



Understanding rail passengers – is there an ‘average’ commuter?

July 2013

Contact: Keith Bailey, Research Team, Passenger Focus
Fleetbank House, 2-6 Salisbury Square, London, EC4Y 8JX
Tel: 0300 123 0822 Email: keith.bailey@passengerfocus.org.uk

Contents

	Page
• Passenger Focus introduction	3
• BDRC Continental's summary of key findings	9
• Main slide deck	21
• Background and methodology	22
• Commuting behaviour	26
• Who are commuters?	
– Days travelled	29
– Working hours	42
– Occupation	51
– Locations worked	60
– Use of other modes	67
– Commuting behaviour over time	75
– Demographics	82
• How well commuters are provided for:	
– Tickets currently used	85
– Potential ticketing products	91
– Summary of experience (NPS)	100
• Summary: meeting the needs of the 'average' commuter	102
• Appendix – Questionnaire	106

Understanding rail passengers



- The *National Passenger Survey (NPS)* run by **Passenger Focus** provides a detailed picture of passengers' journey experiences but cannot address every topic of interest to the industry (for more details click [here](#))
- This series of occasional reports aims to fill some of these gaps in our knowledge through additional analysis or separate ad hoc survey research

Understanding rail passengers – the ‘average’ commuter

- In this report we look at the ‘average’ commuter – does he or she exist and how does he/she act in terms of rail commuting behaviour?
- There is a tendency to think of commuters as besuited, umbrella-wielding, middle-aged professionals travelling to the City from a leafy suburb where they religiously board the 08.16 every Monday to Friday. We know this can’t be reality – but what is ‘reality’?
- Furthermore, recent research into passengers’ festive period travel experiences showed up to 20 per cent of passengers at the weekends over the Christmas/New Year 2012/13 festive period to be commuters
- To help get a better understanding of passenger behaviour – including weekend commuting – we undertook additional analysis of NPS data as well as specific research into commuting habits, looking at the demographic profile of commuters, the work they do, when they travel, and the tickets they use

The 'average' commuter

What did we find?

- The weekday '9am-5pm' commuter is still very much alive:
 - 97 per cent of commuting journeys are made on weekdays (but even the 3 per cent at weekends represents 29 million journeys per year)
 - Most (83 per cent) commute to an office – with 40 per cent being professional/senior management and 23 per cent middle management
 - 83 per cent of weekday commuters travel in peak hours (starting work between 8-10am in the morning and finishing between 4-7pm at night)

The 'average' commuter

What did we find?

- But not everything conforms to the stereotype:
 - Of those who commute only on weekdays, just 57 per cent did so for all five days
 - Only 59 per cent had a season ticket – 29 per cent had a peak single/return
 - Much of the three per cent commuting at weekends is by people who also travel in the week rather than just at weekends – the 'week-round' commuter

The 'average' commuter

What did we find?

- Understanding the 'week-round' commuter
 - Almost a quarter of week-round commuters worked six (17 per cent) or seven (seven per cent) days a week
 - There are fewer managerial workers at weekends and a higher proportion of retail/transport and hospitality workers
 - Only 68 per cent travel to an office
 - Week-round commuters spend a higher proportion of their net income on commuting than do weekday commuters
 - 31 per cent of commuters on Saturdays occasionally/regularly catch the first train; on Sunday it is 62 per cent
 - 'Week-round' commuters are more reliant (than weekday only commuters) on other forms of public transport as a part of their commute

The 'average' commuter

Implications and challenges for the industry

- Tickets
 - Not everyone travels enough to justify a season ticket
 - Seasons are less attractive for those travelling at weekends or working at different sites on different days of the week
 - Those travelling a few days each week are particularly interested in Carnet tickets
 - Amongst weekday commuters there is an indication some might adjust their working/travelling hours if appropriate ticket offers made this financially attractive
- Timetables
 - A desire for earlier first and later last trains, especially at weekends

**Rail commuter research:
Is there any such thing as
the average commuter?**

Summary of key findings

May 2013



Background

The research

In March 2013, Passenger Focus conducted an online survey to better understand passengers' behaviour and needs when commuting by rail. The research has a particular focus on weekend commuting, since people who commute at weekends emerged as an important and unexpected subgroup in other recent research. The National Passenger Survey (NPS) also indicates that around 3 per cent of all commuter journeys are made at weekends (approx. 29 million journeys). Passenger Focus therefore wished to understand more about how this fits in with traditional assumptions about rail commuters.

583 passengers were interviewed, all of whom commute to work or education by train. Within this we spoke to two groups of passengers: those who commute on weekdays only (Monday – Friday), and those who commute at weekends (Saturday and/or Sunday). Almost all of the latter group also commute on weekdays in addition to weekends, and so this report describes them as '**week-round**' commuters (in contrast to '**weekday**' commuters).

The research sought to understand:

- The types of jobs which commuters undertake
- Which days of the week they work and of these which days they commute by train
- Whether other methods of transport are also used for commuting
- Times of travel, including whether first/last trains are early/late enough
- Ticketing, and appeal of potential flexible ticketing products
- Access to the station
- Length of time making this commute (including previous modes used and reasons for change)
- Any previous commuting journeys made

This report

This document provides a top-line summary of the key findings of this survey, '*Understanding rail passengers: the 'average' commuter*'. The accompanying slides contain further detailed analysis. The notes at the bottom of each page of this summary highlight where additional analysis can be found within the main slide deck.

For more detail on the background, the methodology, and the context in terms of number of journeys made at weekends, please see pp. 21-27 of the main slide deck

Days travelled by rail commuters

While rail commuters are most likely to work/attend education on weekdays, a small number also do so at weekends

The vast majority of rail commuters only ever travel to work on weekdays (Monday – Friday), which is consistent with industry assumptions about the travel patterns of commuters. However, weekend commuting does also exist; 3 per cent of all commuters report travelling to work on Saturday in the last week and 2 per cent on Sunday. Therefore although weekend commuting applies to only a small proportion of all commuters, it is present and should be acknowledged.

Throughout the week, Monday to Thursday are the days on which the highest levels of commuting activity are reported. Around 90 per cent of all commuters travel to work on each of these days every week or regularly. Slightly fewer commute on a regular basis on Fridays (81 per cent), making Friday slightly atypical as a weekday in terms of commuting journeys made.

While weekday commuters tend to travel on the same days of the week, every week, commuting at weekends is habitual for those that do this but is not consistent on a weekly basis.

For those that commute at weekends, it is more common to travel to work/education on Saturday than on Sunday. Most week-round commuters (62 per cent) work/attend education on Saturdays on a regular or occasional basis; only 9 per cent work/attend education on this day every week. Similarly, whilst almost half of week-round commuters (48 per cent) work/attend education regularly or occasionally on Sundays, only 4 per cent do so on this day every week.

Commuters do not always work/attend education in a fixed five-day week pattern as is often assumed. Whilst most commuters do work/attend education five days each week, over 40 per cent do so on fewer days each week. Conversely, week-round commuters tend to work/attend education on average slightly more days per week: almost a quarter do so on six or seven days each week. This is partly linked to the type of employment which week-round commuters have, and also suggests that weekend commuting is 'additional' to also working/attending education on a number of 'core' days within the traditional working week.

Hours worked by rail commuters

Most rail commuters usually work/attend education between 'peak' hours on a full time basis; however there is substantial variance with many having some choice over their working hours

Almost 80 per cent of commuters are in full time employment (30 hours a week or more). This is true for both weekday and week-round commuters; however week-round commuters are more likely to work 36 hours or more, meaning that on average this groups works (and/or attends education) for slightly more hours per week than those commuting on weekdays only.

During the week, the vast majority of all commuters begin and finish work/education between 'peak' times, with 83 per cent starting between 8am and 10am and finishing between 4pm and 7pm. Just over one in ten start and finish work earlier than this, beginning at before 8am and finishing before 4pm, so there is some spread across the day.

For those who (also) work/attend education at weekends, there is much more variance in the hours worked. There is still something of a 'peak' on Saturdays and Sundays although this is slightly later in the mornings and slightly earlier in the evenings than on weekdays and is not so definitive as during the week. This indicates a potential appeal for having more frequent services around peak times as for weekdays, but also to ensure service provision more generally throughout the whole day to accommodate the flexibility in working patterns.

Whilst working/education hours are fairly routine for many commuters, absolute fixed hours are rare. The majority report slight variance in hours worked on a day-to-day basis and over a quarter say that the hours they work completely differ each day (whilst less than one in five report working the exact same hours daily). This variance is even more pronounced amongst week-round commuters, almost half of whom report working/attending education during completely different hours each day.

Over 40 per cent of all commuters have some degree of choice over the precise hours which they work/attend education. This could be an early indication that new ticket products (such as off-peak seasons) might encourage more travel outside of peak periods to help relieve the peaks themselves, because some commuters have capacity to change travel behaviour.

Note that, whilst week-round commuters have greatest variance in working hours, they tend to have less personal control over this than other commuters. Daily hours are fixed for 68 per cent of week-round commuters, compared to 55 per cent of weekday commuters. This indicates more shift working amongst week-round commuters, where hours are prescribed but variable.

For more detailed analysis, please see pp. 41-47 of the main slide deck

Use of first and last services by rail commuters

There is some demand for earlier and later trains amongst commuters, particularly at weekends

The proportion of passengers using the existing first and last trains on their route to make commuting journeys is considerable, and is even higher at weekends. First trains in particular are regularly used, especially at the weekend. First trains are used on an occasional or regular basis by more than one in five commuters during the week, by 31 per cent of those commuting on Saturday and 62 per cent on Sunday (of which 39 per cent use the first train on Sunday regularly). Last trains are also used in a similar pattern across the week, although to a lesser extent overall.

Of those using the first train, 75 per cent of commuters consider it to be early enough for their needs – so a quarter do not. Satisfaction with the timing of the first train drops to only 59 per cent amongst those who commute at weekends.

Similarly 64 per cent of those that use the last train consider it to be late enough for their needs whilst less than half – only 44 per cent – of those using the last train at weekends are satisfied with its timing.

This demonstrates that there is a significant appetite for earlier and later services seven days a week, and particularly at weekends where demand for services for commuting journeys does not appear to be fully met by current timetables. Earlier and later services at weekends might therefore better accommodate weekend commuting.

Occupation of rail commuters

Rail commuters span a range of occupations, but managerial grades within the public and 'business services' sectors are most prevalent

Almost 90 per cent of all rail commuters define their occupation as 'managerial', with around 40 per cent in professional or senior managerial roles, and almost a quarter in each of middle and junior managerial positions. Whilst only 3 per cent of all rail commuters describe their occupation as 'manual', these roles apply to a higher proportion of week-round commuters (amongst whom there is a correspondingly slightly lower proportion of managerial occupations).

Rail commuters are employed across a wide range of sectors, the most prevalent of which are government and the public sector (accounting for almost a third) and 'business services' including banking/finance and IT/telecoms (accounting for a quarter). Whilst this is true of both weekday and week-round commuters, a higher proportion of the latter are employed in services which typically function seven days a week, namely retail, transport and logistics, hospitality and other service sectors.

There is a diverse variety of specific job titles encompassed within each of these sectors – from 'crematorium technician' to 'consultant cardiologist', 'tax inspector' to 'social worker', and 'financial analyst' to 'customer service officer'. Jobs held by weekday commuters are predominantly managerial and office based. Whilst many of these sorts of jobs were also undertaken by week-round commuters, more of amongst this group held positions which naturally imply more of a frontline element, within both public and private sectors, such as healthcare, the police, other local government functions and customer services.

Locations worked at by rail commuters

Most rail commuters travel to offices in city centres

Most commuters travel to an office (83 per cent), although this is a little less the case for week-round commuters (only 68 per cent of whom travel to an office). Week-round commuters are more likely than other commuters to travel to shops or other retail units, hospitals and hotels – reflecting the higher incidence of customer-facing and ‘frontline’ staff among those who commute at weekends.

The majority of all commuters travel to the same site each day (70 per cent). Week-round commuters are more likely than those who commute only on weekdays to work from different sites, but are less likely to work from home; again, indicating the increased likelihood of this group to do ‘face-to-face’ or ‘on location’ work.

As is well established, commuters tend to travel from peripheral areas to regional centres; most commuters travel to large towns or cities for work or education, and many commute from suburban areas to the principal town or city in that area. London is an important centre drawing commuters from its outer lying areas as well as those making long distance commutes from other locations all over the country. However, 55 per cent of commuters in this research commuted into a range of other towns and cities across Great Britain.

Alongside this general trend, alternative commuting behaviour does also exist. For example, some commuters make interurban journeys from one city to another, and a small number ‘reverse’ commute from a larger town or city to a smaller location or suburban area.

(Note that NPS shows that around half of commuter rail journeys take 30 minutes or less, but a third of all commuter journeys take between 30 minutes and an hour, and many commutes also take substantially longer than this).

Use of other modes of transport amongst rail commuters

Rail commuters tend to use the train for most of their commuting journeys, although train travel is often likely to be combined with other modes for those commuting at weekends

Rail commuters travel by train for the majority of their commuting journeys, however train travel is more likely to be combined with other modes for those commuting at weekends. 31 per cent of commuters who work/attend education on Saturday, did not travel by train on their most recent Saturday commute, whilst 41 per cent chose to travel by another mode when working/attending education on Sundays.

Those that do use other modes for their main commute use a range of alternatives. Over half travel by car, whilst other public transport such as bus and the Underground are also popular, as is walking and cycling. Use of alternative public transport (particularly bus travel) and walking is much more prevalent amongst week-round commuters, who are less likely to travel by car.

Convenience is the key reason for using modes other than rail to commute on some days. Timetabling concerns, including the journey time, frequency of services and first/last services are far more prevalent amongst week-round commuters. This again indicates that timetables may not always meet the needs of those commuting at weekends and mean they are obliged to use other modes.

Travel to origin stations for outbound commuting journeys is mainly on foot whilst car is also an important alternative. Again, car use is higher amongst weekday commuters and week-round commuters are more likely to walk, use the bus, or travel by bicycle.

Commuting behaviour over time

Most rail commuters are long term users of their routes, with around a quarter using the train more now for commuting purposes than in the past

More than half of commuters have been commuting on their route for five years or longer, with almost a quarter of those using the route for ten years or more. Week-round commuters are more likely to be medium-term users of their routes, with almost half of this group commuting for two to five years (this group is a little younger on average).

Most commuters feel that they use trains about the same amount now as they have done in the past. Those who commute by train more now than in the past (around a quarter of all commuters), do so for a wide range of reasons, including price, proximity to a railway station and improved frequency of trains, whilst less access to a car is a particularly important influence for week-round commuters. Amongst those who use trains for their commute less now than in the past (13 per cent of the total), reduced working hours or more working from home are important contributing factors, with price and ability to use other public transport services being particularly important for week-round commuters.

A quarter of rail commuters have commuted using another mode previously before switching to rail, whilst the majority have only ever used the train for the commuting journey they make currently. Most of those who switched to train, previously used to travel by car. However, week-round commuters were more reliant on other public transport or shared transport. (It should be noted that this research captured only *current* rail commuters, so cannot comment on any passengers who may have switched *from* rail to other modes).

Reasons for starting to travel by train are varied. Almost a quarter of all commuters list other transport being too expensive as a reason for switching, whilst a significant proportion also switched due to living closer to a railway station now than in the past. A lack of alternatives, both car and other public transport, are more important amongst week-round commuters.

The reasons given for travelling more or less by train, and for switching to train, indicate that rail has often become a more attractive option for those commuting during the week, than it was previously. However, this doesn't appear to be the case for those commuting at weekends, for whom any changes in usage of rail over time are often more likely to be for other reasons, and importantly appear to be less often the result of personal choice.

For more detailed analysis, please see pp. 74-80 of the main slide deck

Demographic profile of rail commuters

Commuters cover a full range of age, gender, location and ethnicity

There is a fairly even split between males and females amongst commuters, although week-round commuters are a little more likely to be male. Most commuters are between the ages of 26 and 64, although weekday commuters are slightly older on average than week-round (just over half of weekday commuters are age 45-64, whilst just over half of week-round commuters are 16-44).

Commuters live across all regions of Great Britain, including almost 10 per cent in the North West, 7 per cent in each of Scotland and the Midlands, and 6 per cent in Yorkshire and the North East. Within this research sample, over half of all commuters lived in London and the South East. Week-round commuters are a little more likely to live within London, than commuting into London, as many weekday commuters do.

NPS shows that 85 per cent of commuting journeys are made by passengers from white backgrounds and 12 per cent are made by passengers of other ethnicities, making other ethnic groups a little more prevalent amongst commuting journeys than leisure or business journeys. Those commuting at weekends are again more likely to be of other ethnicities: 20 per cent of weekend commuter journeys are made by people from non-white backgrounds. This suggests that week-round commuters will include a slightly higher proportion of minority ethnicities than weekday commuters.

Tickets currently used by rail commuters

A substantial proportion of commuters are not catered for by season tickets

Whilst season tickets are prevalent (used by 59 per cent of all commuters) they do not serve for all commuting journeys. Almost a third of commuters use Anytime tickets, whilst 21 per cent use Off-peak or Advance options.

The ticket types used do vary by days commuted. Weekday commuters are a little more likely to use a season ticket, particularly on an annual basis, than week-round commuters. More week-round commuters make use of Off-peak and Advance options, with almost a half of this group opting for these tickets.

Many commuters use more than one type of ticket for their commuting journeys, with week-round commuters on average using a slightly greater variety of ticketing products than weekday commuters. This combination approach indicates that for some, there is no single existing ticket type which fully meets their needs. The greater incidence of this amongst week-round commuters suggests these passengers are less well catered for by the current ticketing system.

There are a number of factors which deter commuters from using season tickets. Most commuters are primarily concerned with the 'value per journey' and are less inclined to purchase a season ticket if they do not expect to travel on enough days to make this worthwhile or if they believe there are other cheaper options available. This is true of all commuters, however commuting to different locations and the upfront expense of season tickets are more of an issue for week-round commuters than others.

On average, commuters report that they spend nearly 10 per cent of their income (after tax and deductions) on their commuting journeys. Proportional spend is slightly higher amongst week-round commuters, almost one in five of whom spend more than 15 per cent on commuting.

Appeal of potential ticketing products

There is substantial appetite for a carnet product, whilst off-peak season tickets are appealing to some week-round commuters

Carnet ticket

A carnet product, allowing passengers to 'bulk buy' tickets at a preferential rate, is very appealing to commuters: 43 per cent claim that they would be likely to use such a product if available. It is a little more attractive to week-round commuters, 46 per cent of whom feel they would be likely to use such a product.

The primary motivations for likely uptake were flexibility and reduced cost. Also important is that a carnet would avoid the issue of 'wasted journeys' which can be a drawback of, or barrier to, season tickets. Other advantages cited included time saved through not having to buy individual tickets, and a better recognition from the industry of flexible working patterns which some feel the current system penalises.

Importantly, the appeal of carnets would depend on the terms of use. Commuters generally are in favour of carnets provided that they would have a long period of validity, be redeemable at both peak and off peak times, and cost less than other options.

Off-peak season ticket

Less than 10 per cent of commuters feel they would be likely to use an off-peak season ticket if available. The concept is slightly more appealing to week-round commuters, but not overwhelmingly so (17 per cent feel they would be likely to use this product).

For those interested, the main attraction is the cost saving incurred, however this is only feasible to those who have considerable flexibility in their working pattern to be able to commit to switching to travel only at off-peak times. It was therefore appealing to those who currently only travel at off peak times, however, some also expressed a willingness to adjust their working hours if financially advantageous.

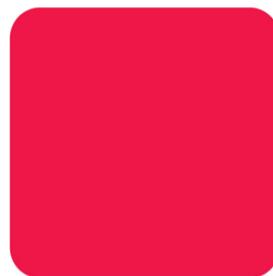
Rail commuter research:

Is there any such thing
as the 'average'
commuter?

Main slide deck

April 2013

Background and methodology



Research Methodology

- Respondents were recruited from the NPS re-contact panel and the survey was completed online
 - The NPS panel is comprised of those who have completed the NPS questionnaire and agreed to being re-contacted by Passenger Focus, to take part in future research about the rail industry. By definition therefore, all were rail travellers
 - The panel contains some biases (such as a bias towards commuters) as a result of NPS using journeys rather than people as the unit of measurement
- In order to be eligible for the survey, respondents must have commuted by train to a place of work or education
 - Survey invites were emailed to passengers who had made a commuter journey when they originally took part in NPS
 - This was supplemented with further invites emailed to a random sample of all other NPS respondents on the panel
 - All those invited to take part had originally completed an NPS questionnaire in the four waves between Spring '11 and Autumn '12
 - Interviewing took place between 25th and 28th March 2013
- The take-up rate was 8 per cent, and 583 people were surveyed. Quotas were set to ensure a minimum of 250 who commute on weekdays only, and 250 who commute at weekends (the latter could also commute at other times)
- As such, **people who commute at weekends were deliberately over-sampled** to provide robust numbers for analysis; in reality the proportion who commute at weekends is much smaller than this. Many results are reported here separately for those who commute at weekends versus those who do not, but when reporting at “all commuters” level, **it is necessary to re-weight the data** so that those commuting on different days are proportionate. Weighting involved three stages:
 1. NPS was used as a source for the number of commuter journeys made on weekdays and weekends
 2. Before this could be done, NPS data was first weighted to convert the sample unit from journeys into passengers, using an estimation of frequency. The sample unit for NPS thus matched the sample unit for the Commuters research
 3. Data from the Commuters survey was then weighted to the proportions of weekend versus weekday commuters, in NPS
- (More detail on these weighting stages is given on the following slide)

More detail on weighting

Stage 1

NPS data was re-weighted to convert journeys into individual passengers (Data from Autumn '10 – Autumn '12 was used, at national level)

Frequency of journey described in NPS	Estimated times journey is made per month	Weight factor applied
3+ times per week	20	0.05
1-2 times per week	6	0.1667
1-2 times per month	1.5	0.6667
Once every 3 months	0.33	3
Once every 6 months	0.17	6
Less often	10	10
First time	1	1

Stage 2

Re-weighted NPS data then provided the following proportions for weekday versus weekend commuters, among all commuters

Cell	NPS
Weekday commuter	94%
Weekend commuter	6%

Stage 3

The Commuters research sample was then weighted to these proportions

Cell	NPS
Weekday commuter	55%
Weekend commuter	45%

Sample groups cited in this research

Throughout this document, several sample subgroups are cited in order to compare and contrast commuting patterns.

Key groups referenced include:

All commuters

All commuters sampled for this research (583)
All respondents said they commute by train to work or a place of education
This includes those who commute on weekdays and at weekends – weighted to NPS journey proportions

Weekday only commuters

All commuters within sample who only ever commute on weekdays (327)

Week-round commuters

All commuters within sample who commute at weekends (i.e. Saturday and/or Sunday) (256)
Almost all commuters within this group also commute on weekdays, in addition to at weekends



Only 2 per cent of those who commute at weekends in our sample had only commuted on Saturday and/or Sunday in the last week – 98 per cent had therefore also worked on weekdays as well as at weekends

NPS

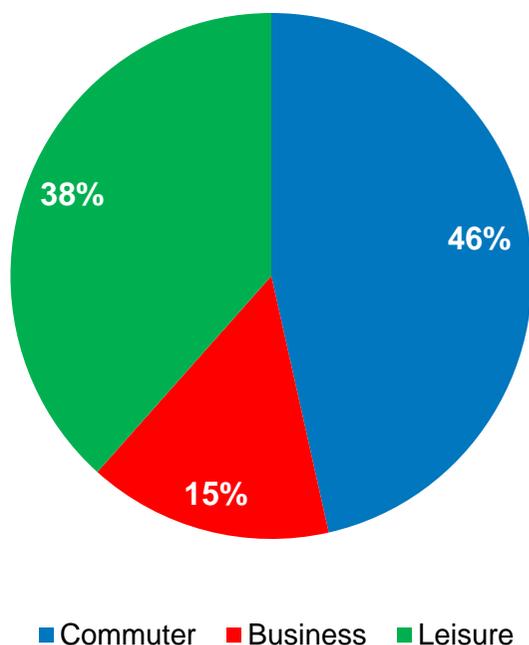
Where NPS is referenced, the last two waves – Spring '12 and Autumn '12 – have been combined
This eliminates any (slight) seasonal variance and boosts sample size for robustness
NPS uses journeys as main sample unit, so refers to commuting journeys rather than commuters

Commuting behaviour

Context: why and when journeys are made by train (NPS)

Journey purpose

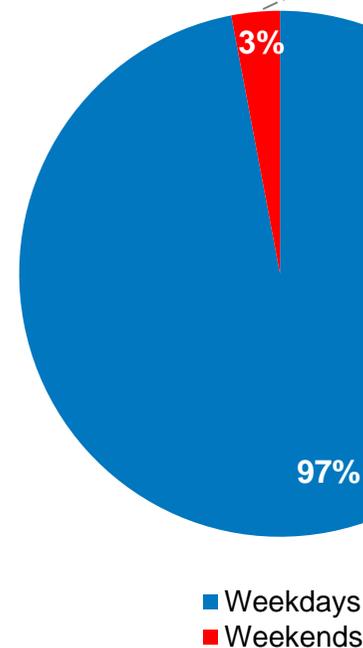
NPS, Spring/Autumn 2012 (i.e. data shows proportion of journeys)



Commuters make up nearly half of all journeys: an important group to cater for

Day of week on which commuting journeys are made

NPS, Spring/Autumn 2012 (i.e. data shows proportion of journeys)

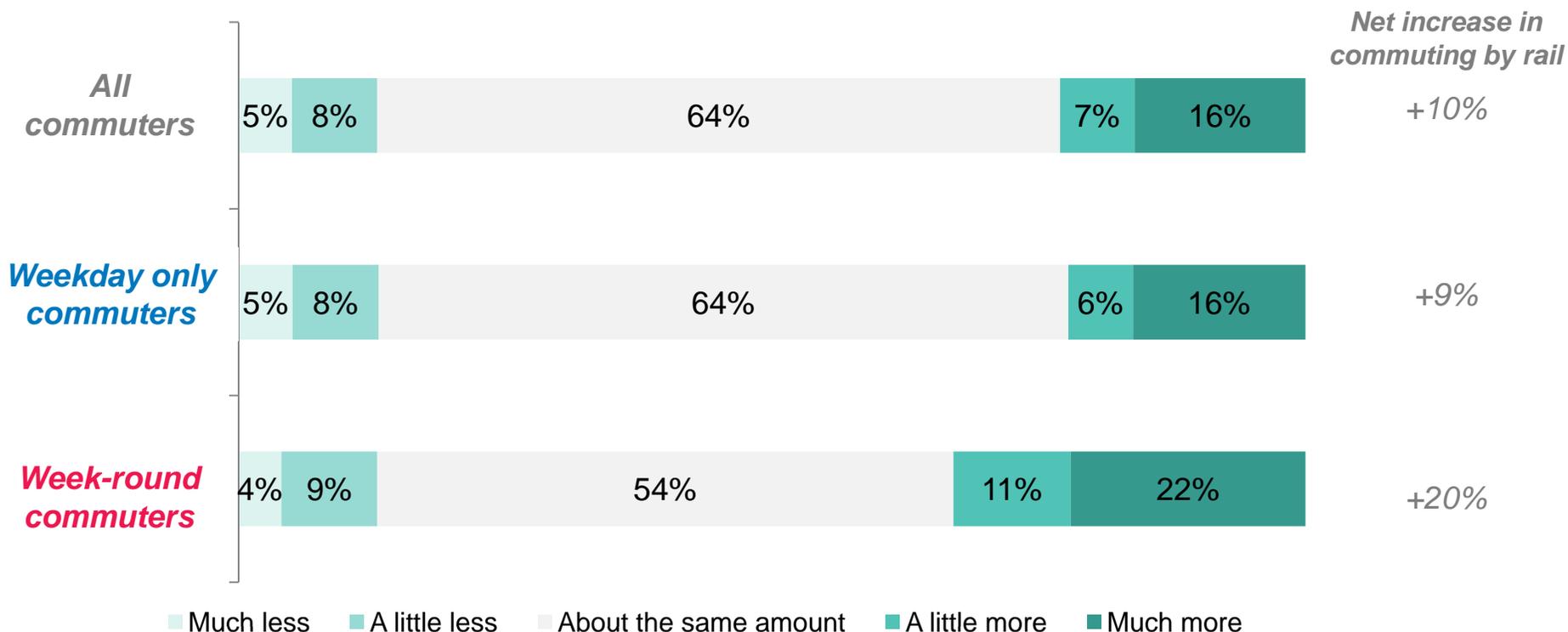


'Pure' weekend commuters who commute only on Saturday and/or Sunday account for only 0.2 per cent of all commuting journeys

The vast majority of commutes are made on weekdays ...but weekend commutes still account for around 29 million journeys per year

Some feel their rail commuting has increased - particularly those who commute at weekends

Use of train for commuting now compared to when first began commuting by rail on this route



Many week-round commuters feel they are commuting by rail even more over time: this substantial minority will feel they deserve recognition

Q27 Compared with when you first started making this journey to your place of work/education, do you now travel by train....?
 Base: All that did not make journey by another mode before starting to use train to commute on this route (441), weekday only (250), week-round (191)

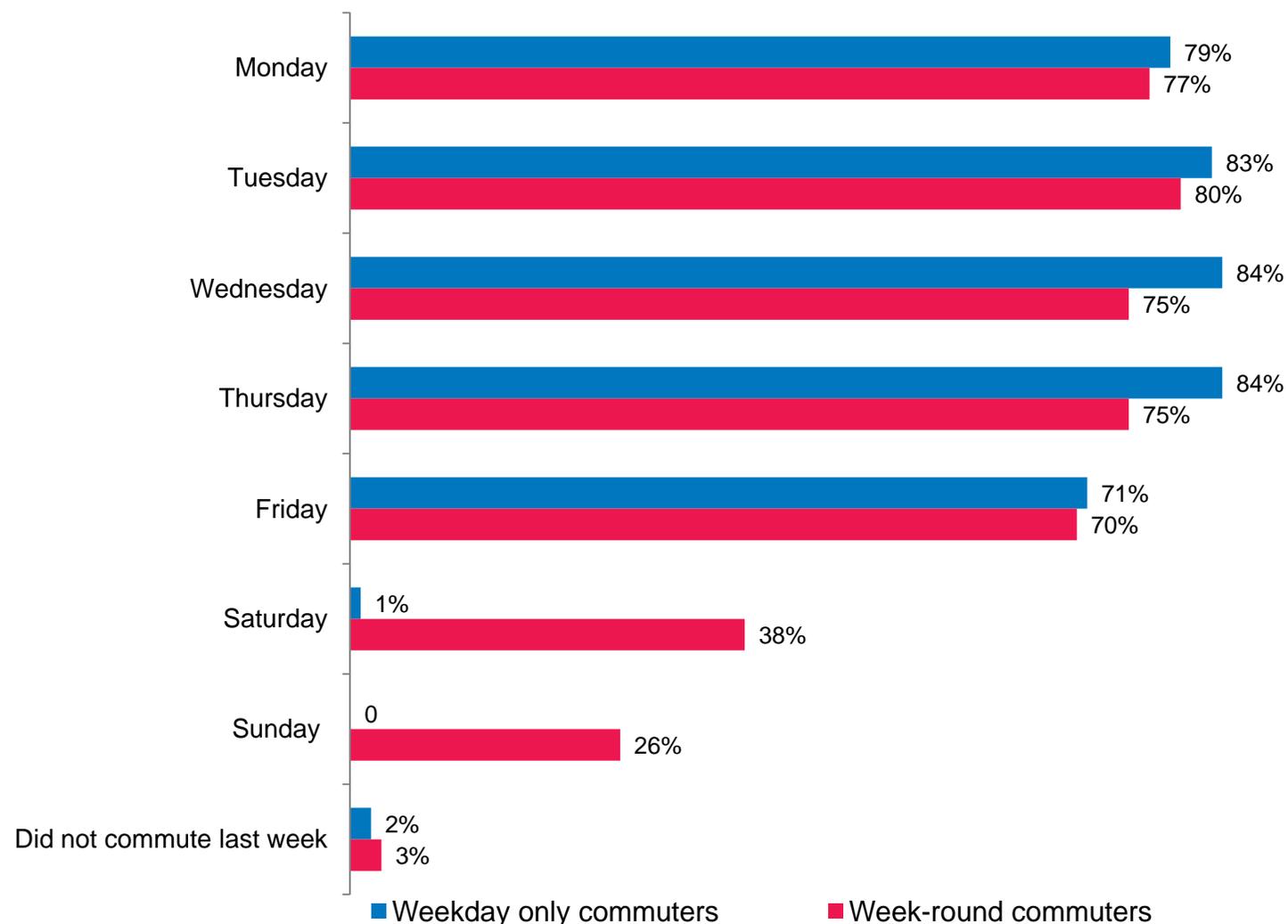
Who are commuters?

Days travelled



Rail commuters are most likely to work on weekdays (even if also at weekends)

Days commuted by any mode in the last seven days



94 per cent of rail commuters only commute from Monday – Friday

Only 1 per cent only commute at weekends

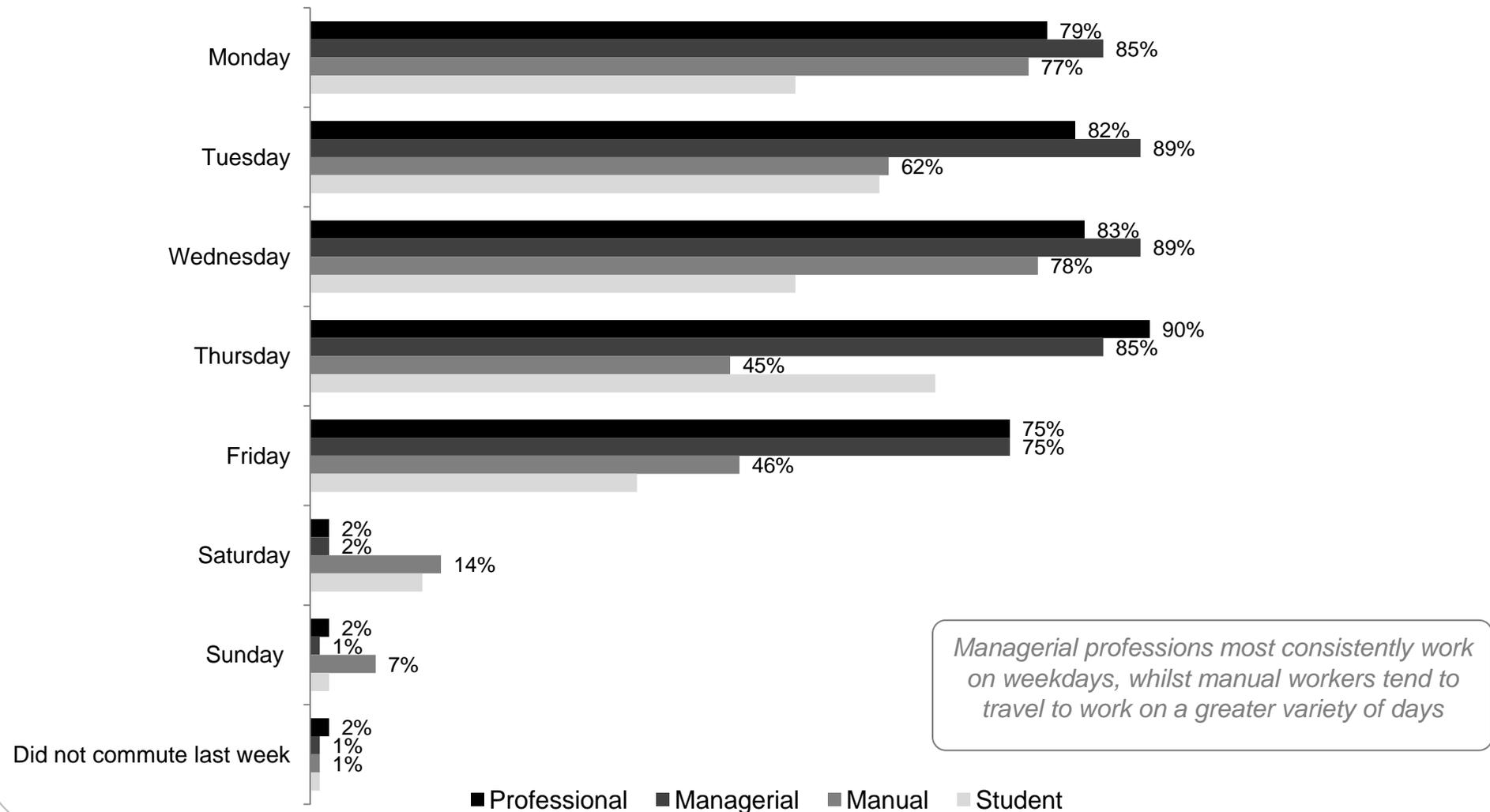
Highest proportion of commuters worked Mon-Thurs, whilst Friday is slightly lower

Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?

Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Proportionally, there is less weekend commuting amongst managerial occupations

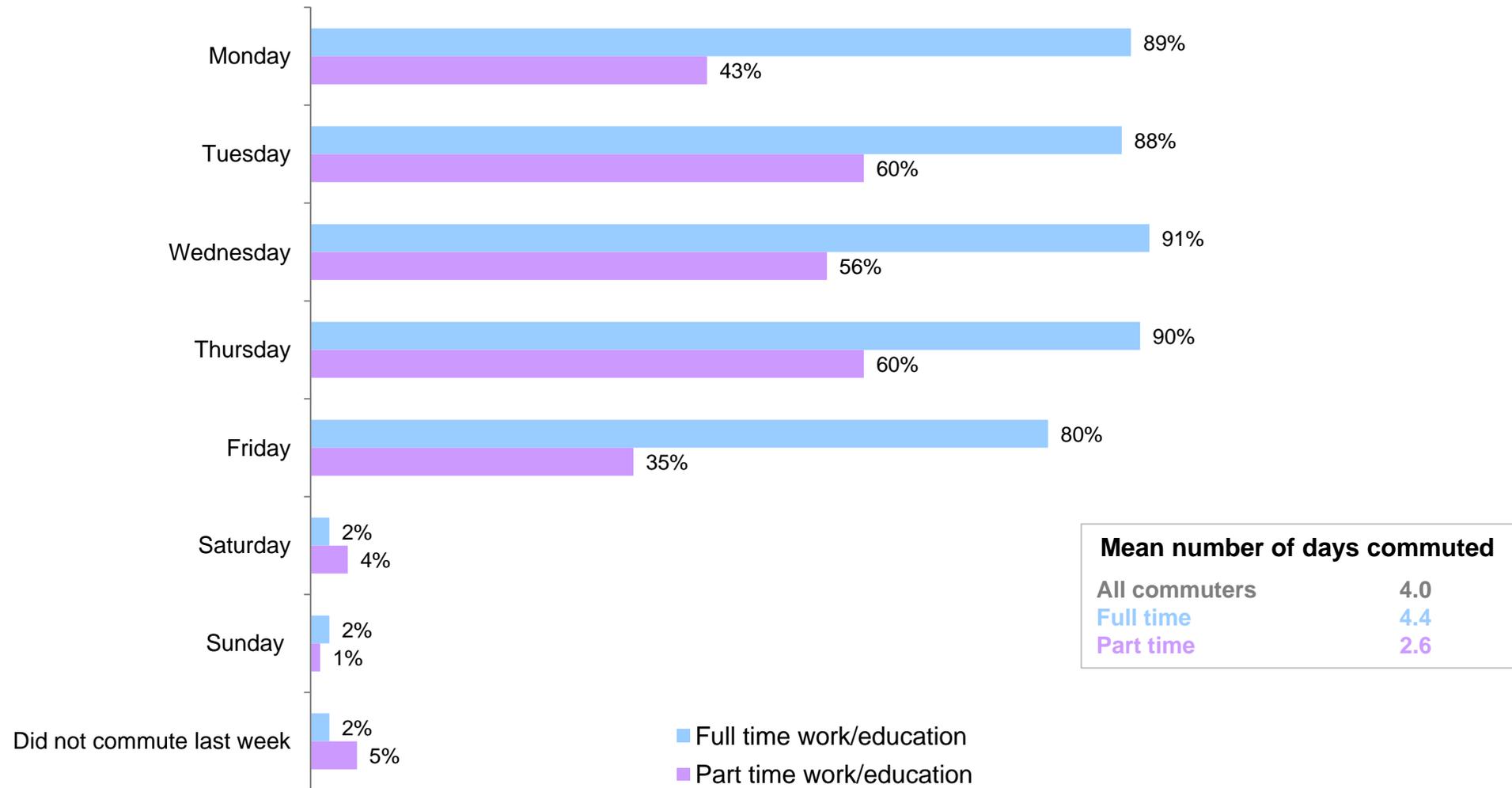
Days commuted by any mode in the last seven days



Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?
Base: All commuters (583)

Those in part time work/education travel on fewer days

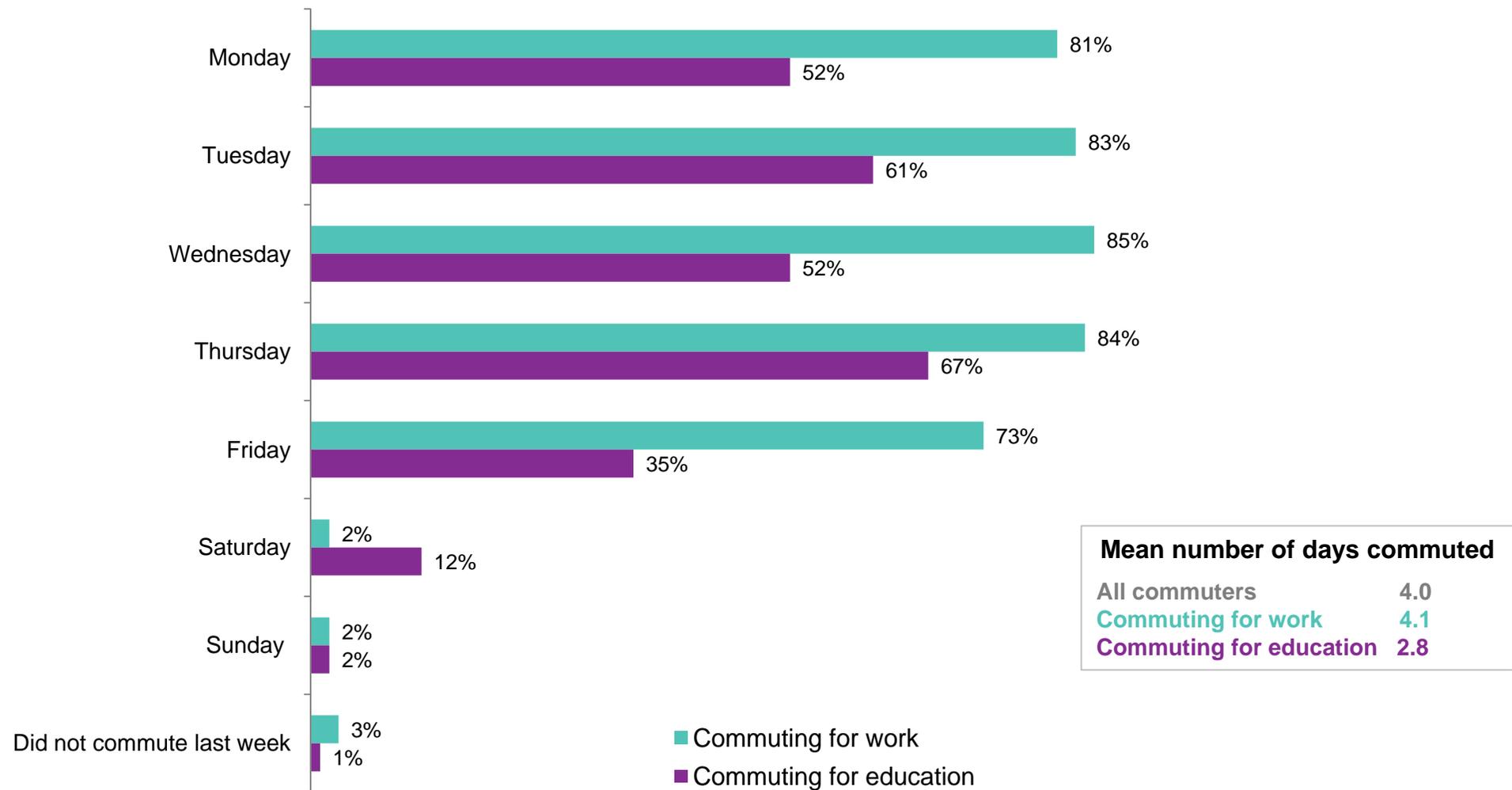
Days commuted by any mode in the last seven days



Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?
 Base: All commuters (583), Full time (473), Part time (110)

Those in part time work/education travel on fewer days

Days commuted by any mode in the last seven days



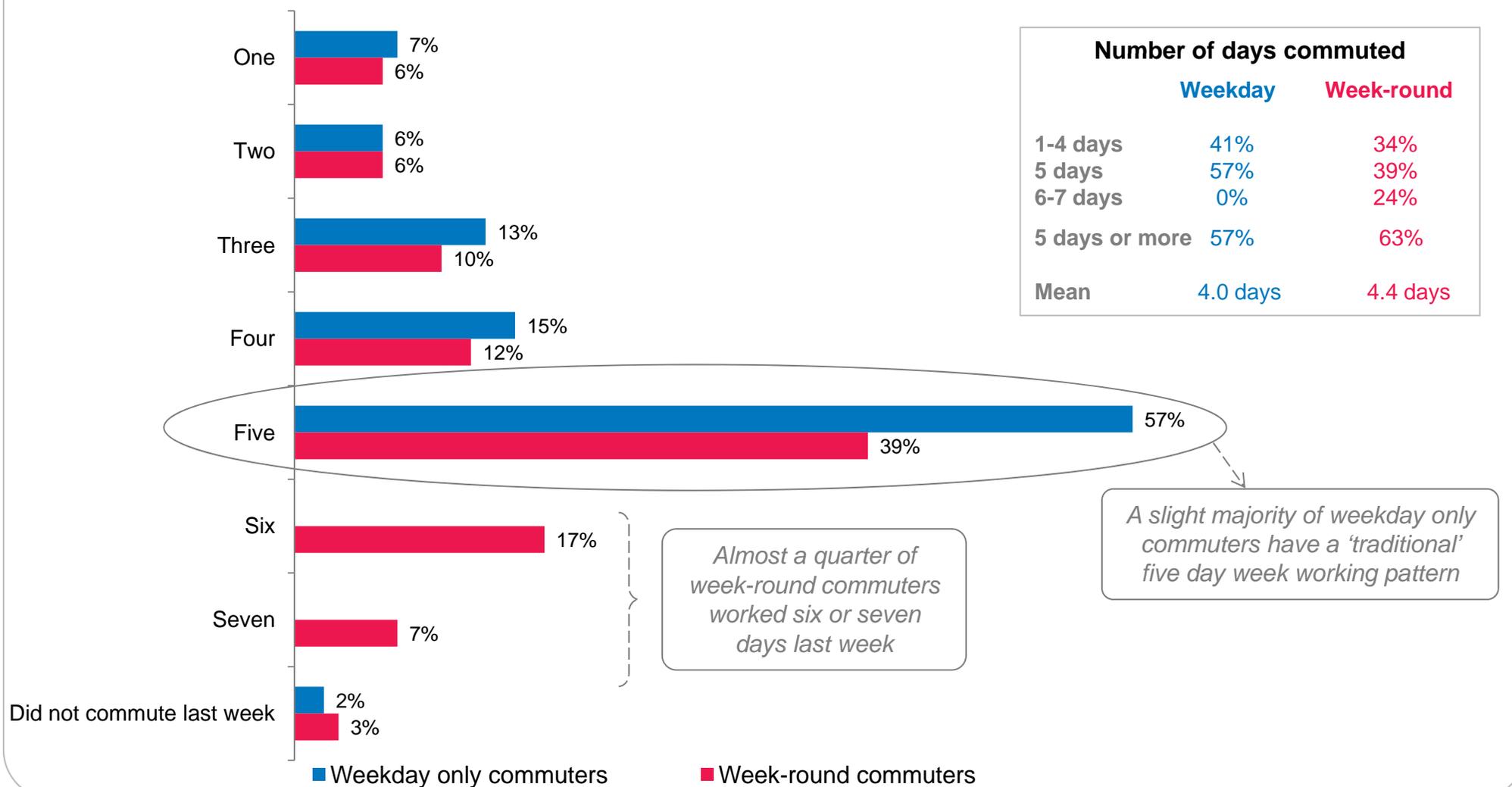
Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?

Base: All commuters (583), Work (546), Education(37)*

*CAUTION: Very low base

Week-round commuters tend to work more days per week

Number of days commuted by any mode in the last seven days



Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

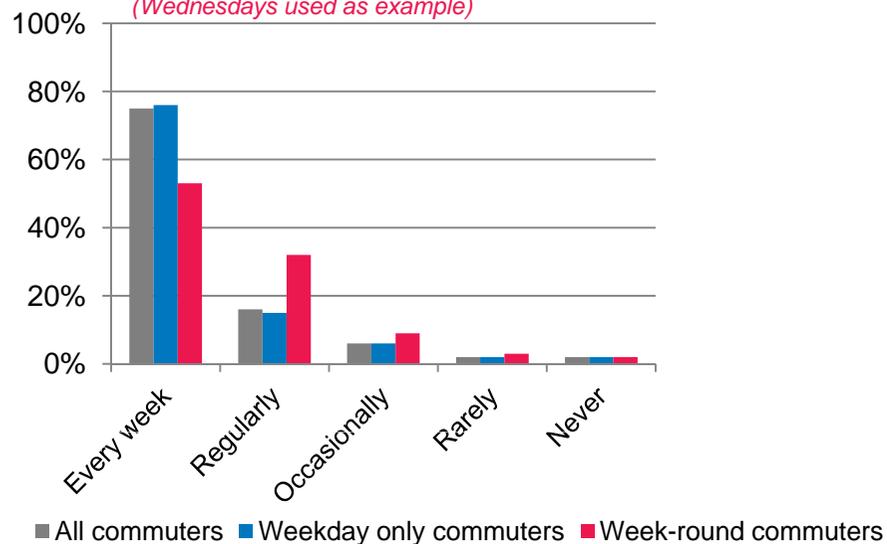
Commuting patterns during the week are relatively stable, but alter slightly on Fridays

How often work/attend education on each day of the week

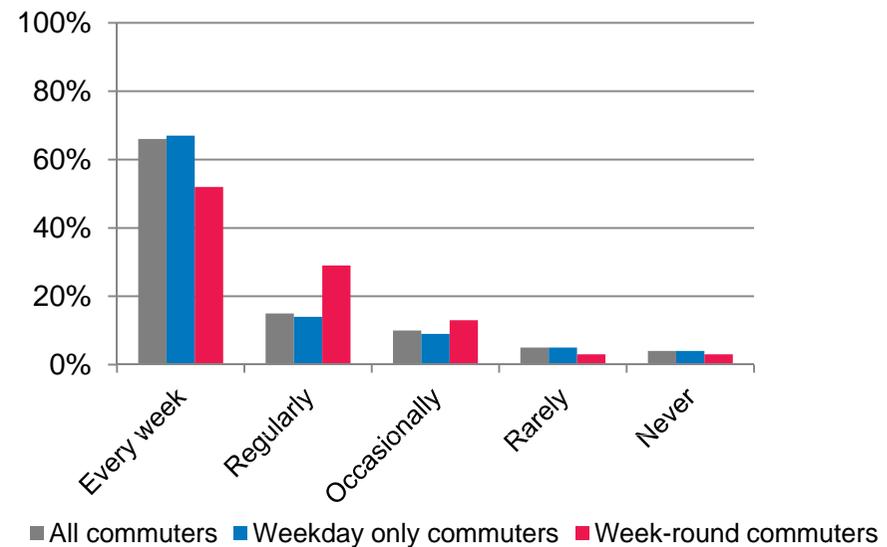
- There is little variance in days worked/attended education on weekdays between Monday–Thursday for both week-round and weekday only commuter groups
 - Around 90 per cent of weekday only commuters work/attend education on these days each week or regularly
 - Around 85 per cent of week-round commuters work/attend education on these days each week or regularly
- On Fridays, the picture changes a little and working/attending education becomes less common for weekday only commuters – the proportion who work/attend education each week or regularly drops to 81 per cent
 - Although the trend remains more consistent with other weekdays amongst week-round commuters (81 per cent work/attend education each week or regularly)
- Those who commute on weekends also regularly work/attend education on weekdays
 - Only 2 per cent of week-round commuters only commute at weekends – the vast majority do so in conjunction with weekdays

How often work/attend education on Wednesdays

(Wednesdays used as example)

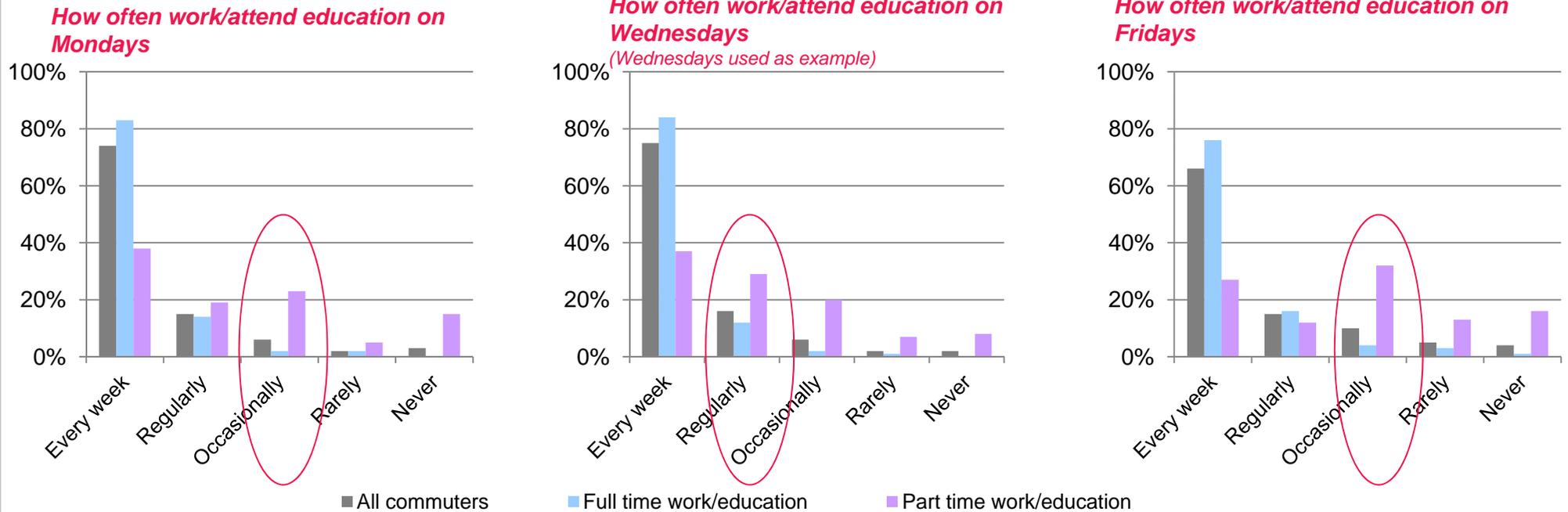


How often work/attend education on Fridays



Those in part time work/education are less likely to commute on Mondays or Fridays

How often work/attend education on each day of the week



Those in part time employment/education are most likely to work/attend education between Tuesday – Thursday when frequency of commuting patterns are stable, but are less likely to work/attend education on both Monday or Friday

Commuters across all groups are less likely to work/attend education on Fridays – and this is even more pronounced amongst part time workers/students (almost a third of whom rarely or never work/attend education on this day)

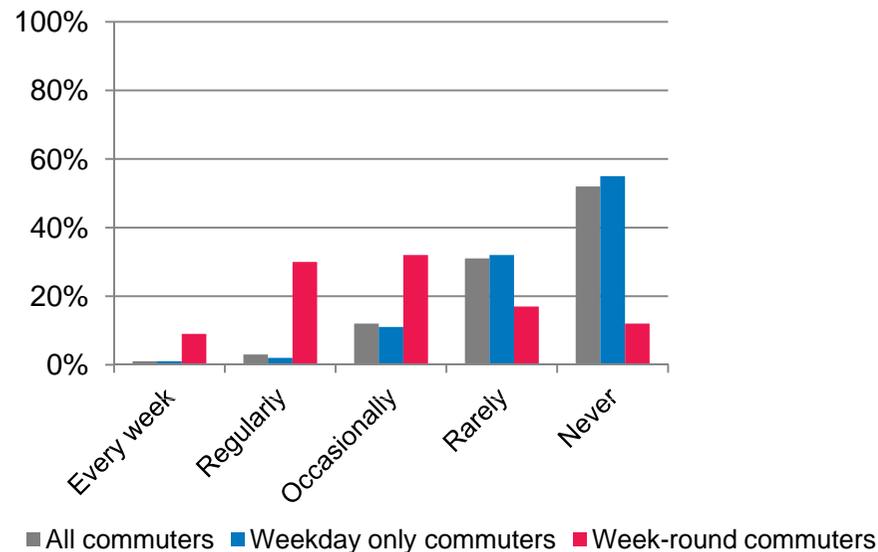
Q5 How often would you say you work/attend education on each day of the week?
Base: All commuters (583), Full time (473), Part time (110)

Weekend commuting is habitual, but not on a consistent weekly basis

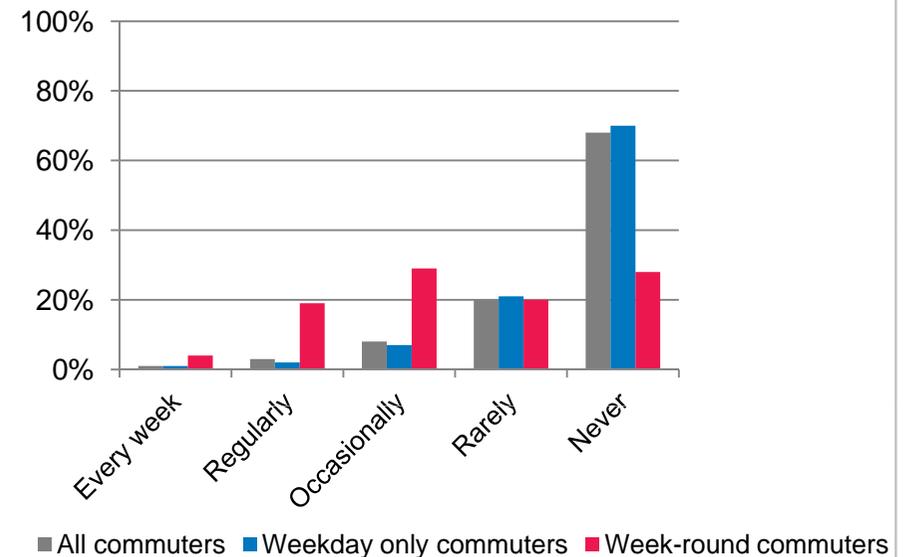
How often commute to work/education on each day of the week

- Most week-round commuters (62 per cent) work on Saturdays on a regular or occasional basis, only 9 per cent work on this day each week
- Similarly, whilst almost half of week-round commuters (48 per cent) work regularly or occasionally on Sundays, only 4 per cent work on this day each week
- Working on Saturday is more common than working on Sunday. More than a quarter of week-round commuters (28 per cent) never work on the latter
- Some 'weekday only' commuters also work at weekends on occasion. This is likely to be on an infrequent ad hoc basis and is likely to be working without commuting (i.e. working from home)

How often work/attend education on Saturdays



How often work/attend education on Sundays

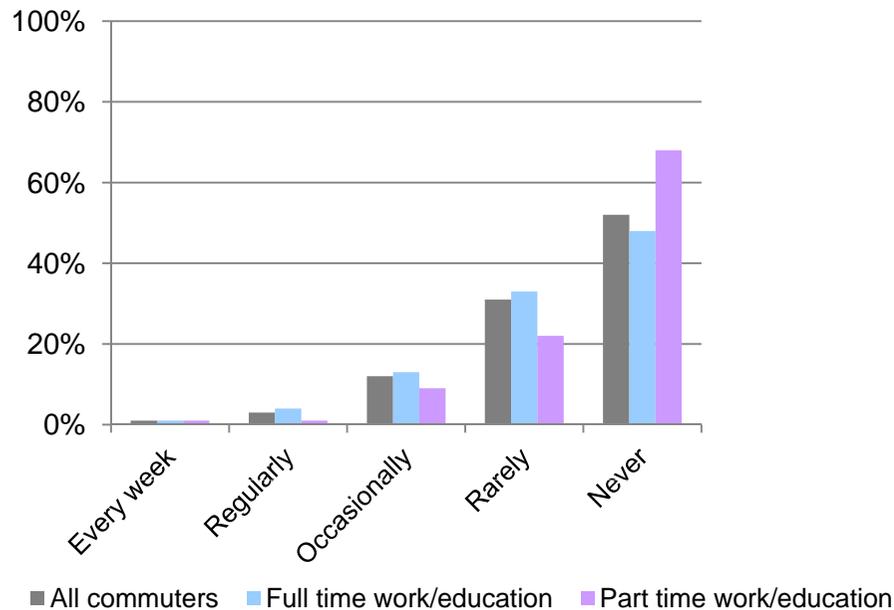


Week-round commuters may not be as predictable as more 'typical' weekday only commuters – but they are consistent, and perhaps merit 'reward' for their custom, as more predictable travellers can do via season tickets

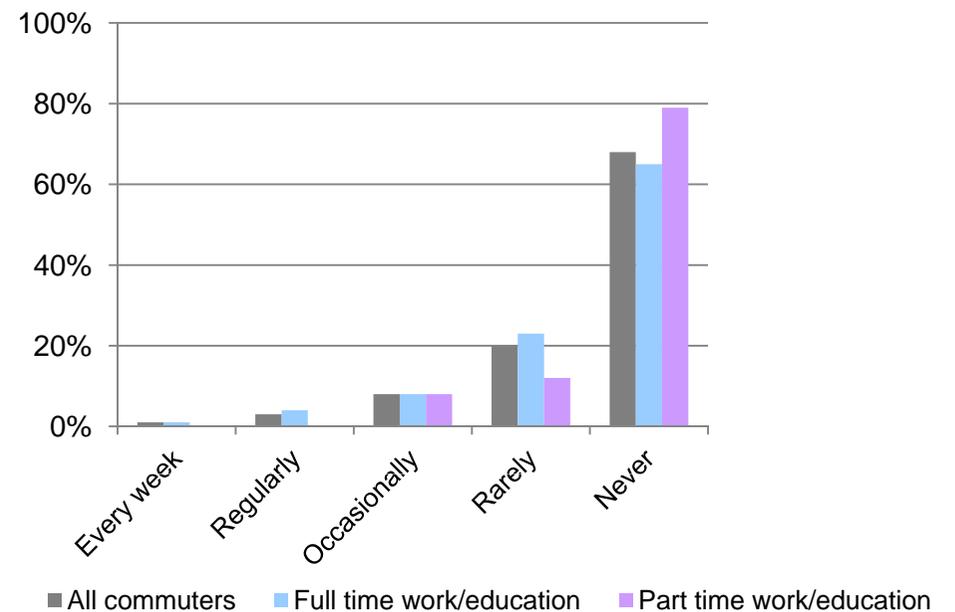
Those in part time work/education are even less likely to commute at weekends

How often work/attend education on each day of the week

How often work/attend education on Saturdays



How often work/attend education on Sundays



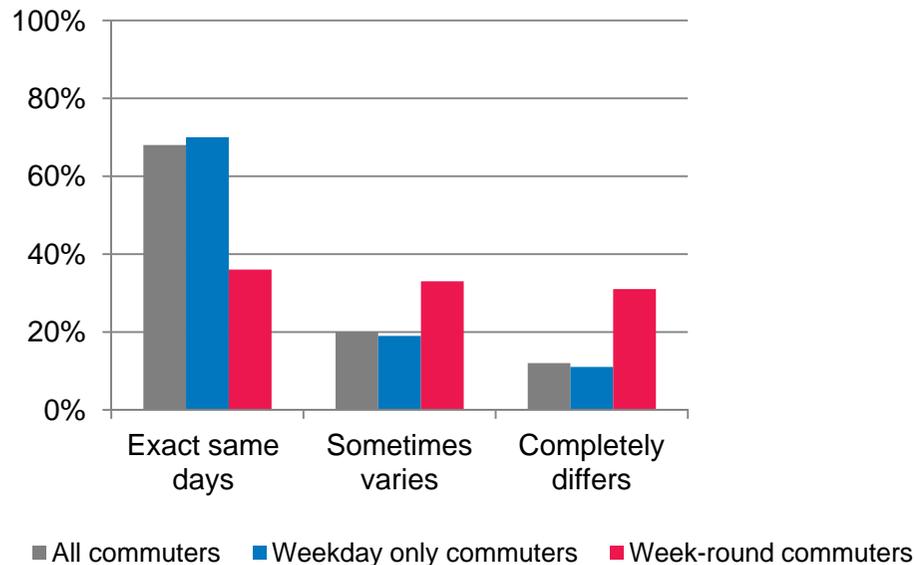
This is a likely function of fewer overall hours worked, so these tend to be more likely to fall within the traditional 'working week'

Q5 How often would you say you work/attend education on each day of the week?
 Base: All commuters (583), Full time (473), Part time (110)

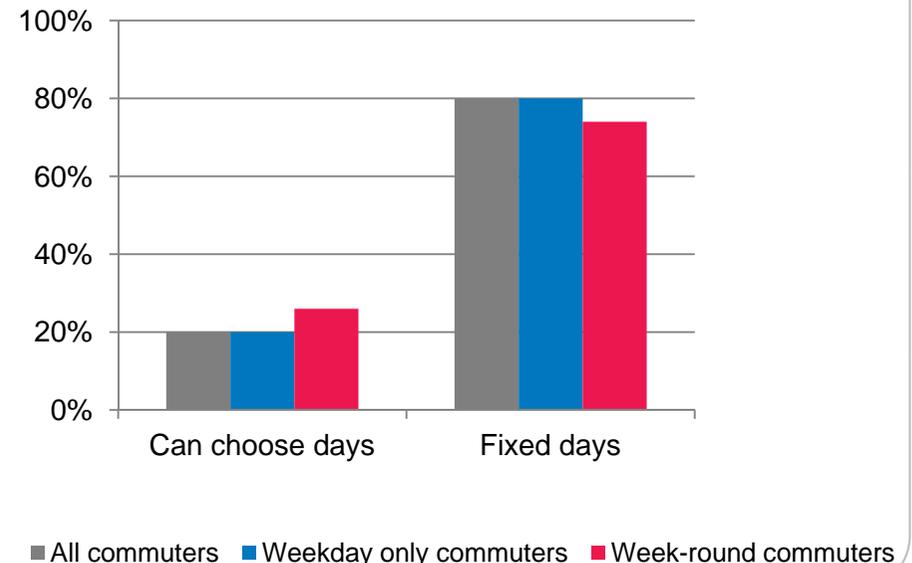
Flexibility in weekly working pattern – days worked by commuter type

- Most commuters work the same days each week, and this is even more true for those who commute on weekdays only
- Weekend commuters are likely to have either a slightly varying (33 per cent) or completely differing (31 per cent) pattern of work from week to week
- Weekend commuters also have slightly more choice over the days that they commute
- This seems consistent with more shift or flexible work, where employees may have some say over the days they are scheduled to work each week which are arranged on a more ad hoc basis than a traditional contract

Variance in days worked each week

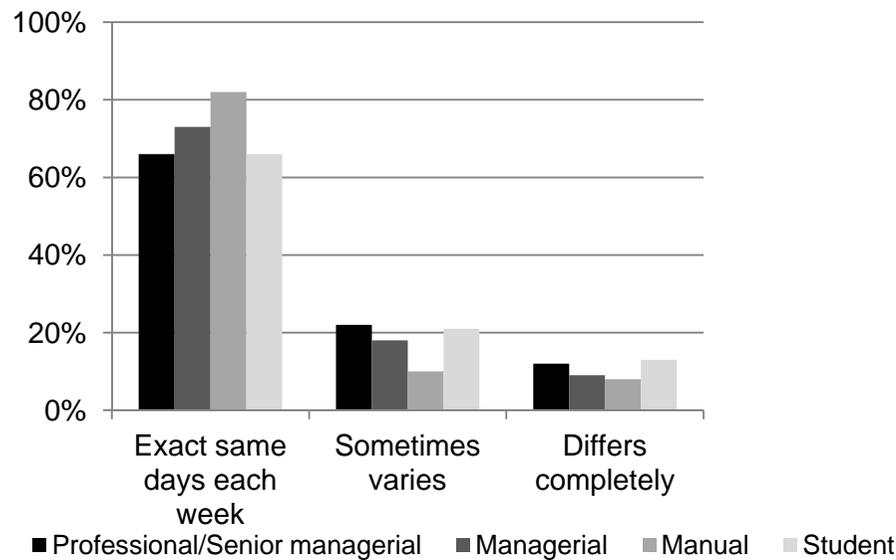


Choice over days worked each week

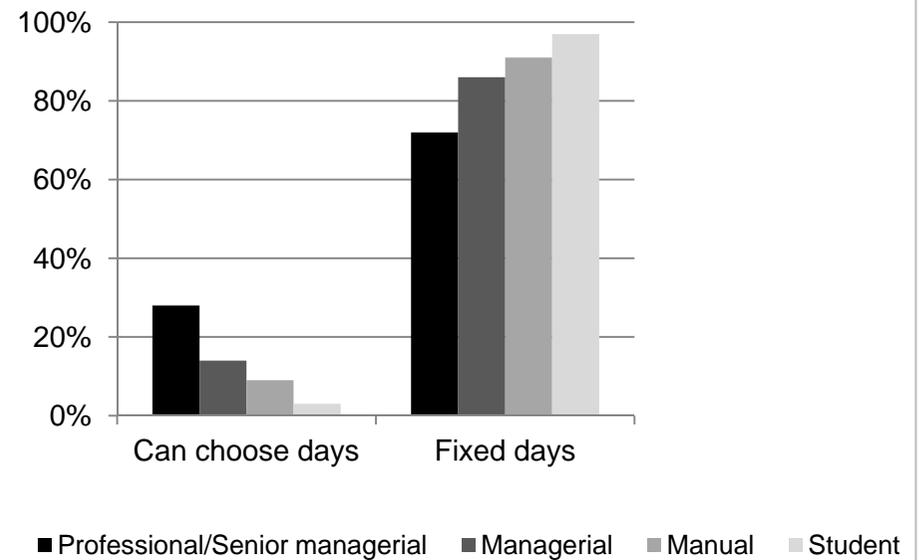


Flexibility in weekly working pattern – days worked by occupation

Variance in days worked each week

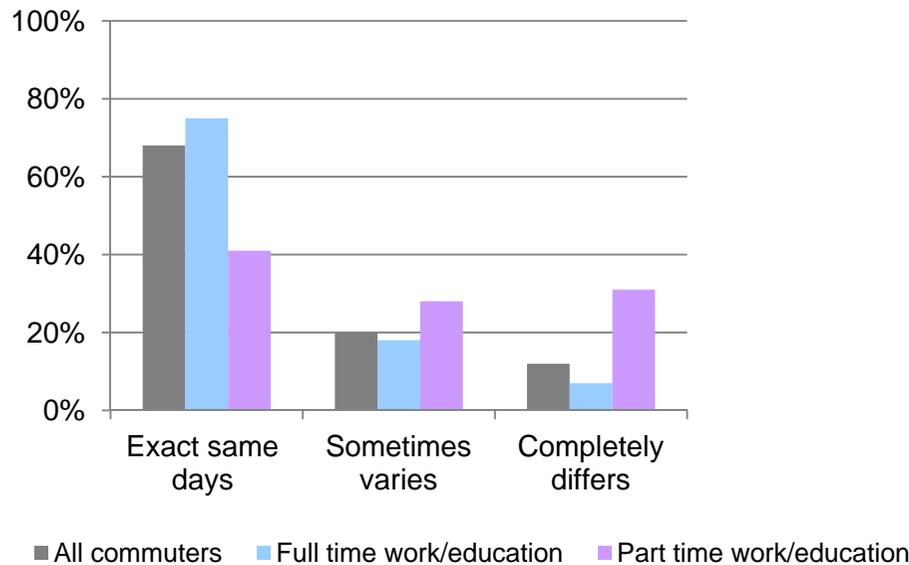


Choice over days worked each week

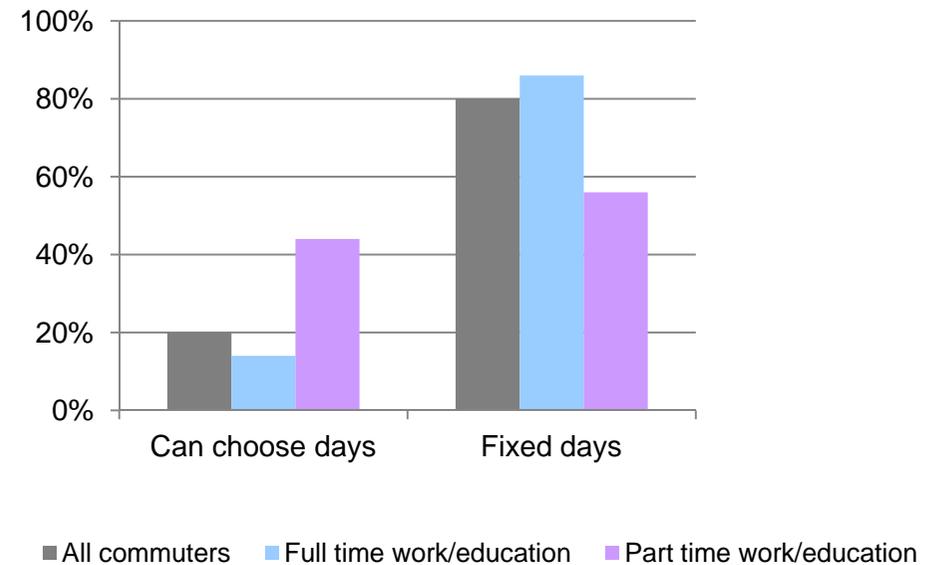


Flexibility in weekly working pattern – days worked by working hours

Variance in days worked each week



Choice over days worked each week



Part time workers tend to have much more flexibility in their working days, and much more influence over this than those who work full time

*However, variance in and choice over **hours worked each day** is consistent across both full and part time*

Q4 Which of these statements best describes your pattern of working/attending your place of education?
Base: All commuters (583), Full time (473), Part time (110)

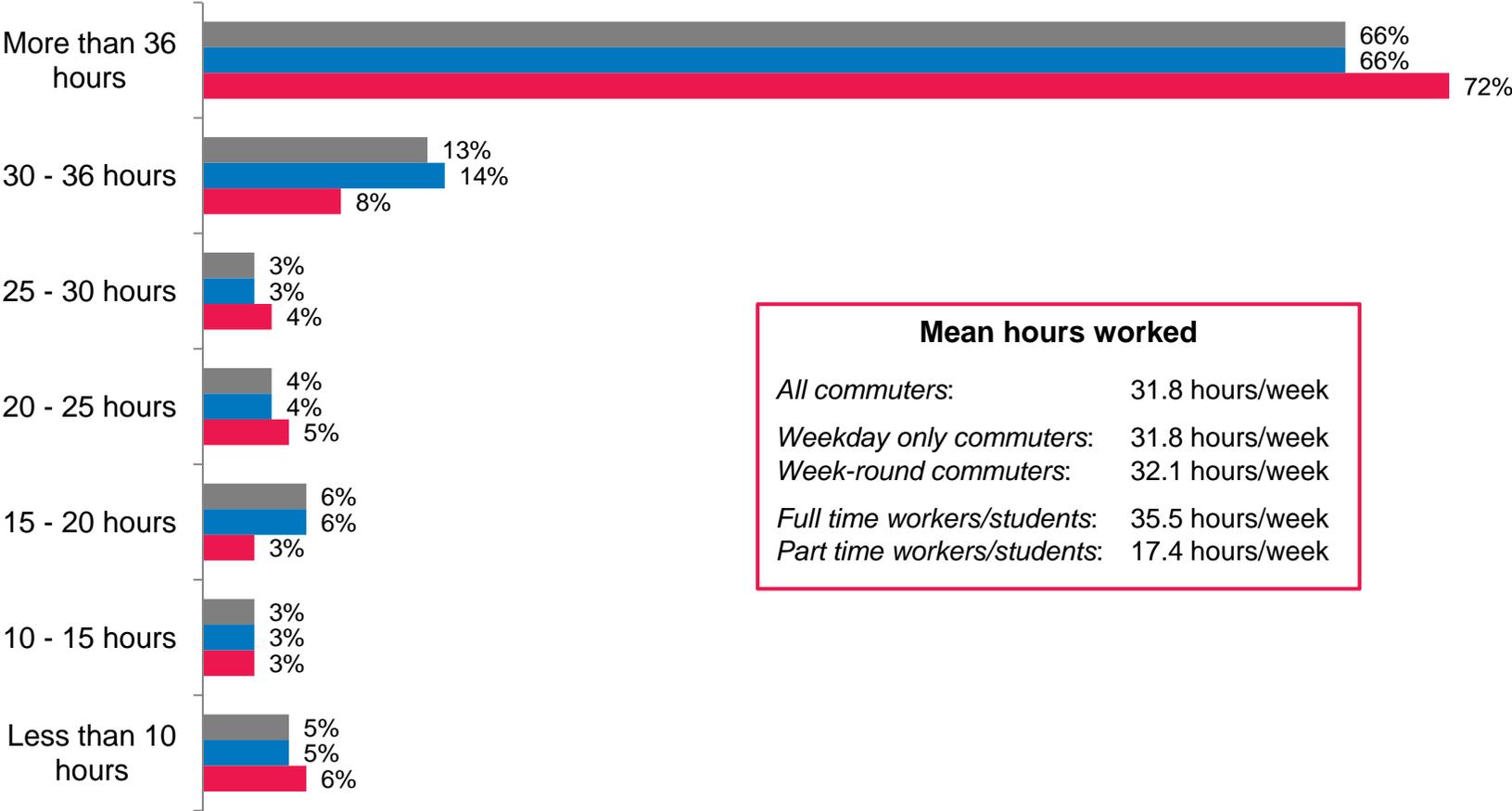
Who are commuters?

Working hours



The majority of commuters are in full time employment/education (30+ hours)

Hours worked/attended education per week by rail commuters



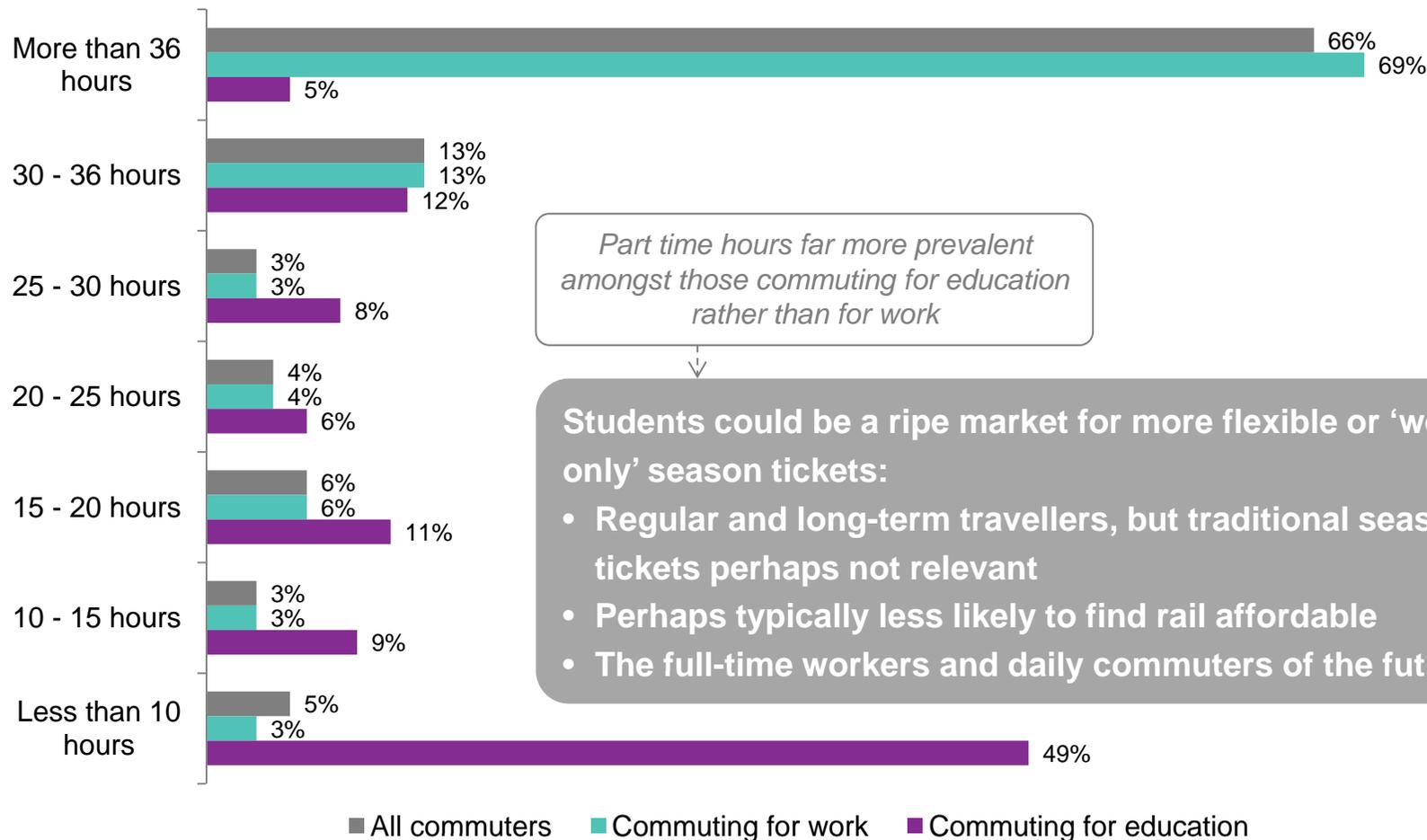
Mean hours worked	
All commuters:	31.8 hours/week
Weekday only commuters:	31.8 hours/week
Week-round commuters:	32.1 hours/week
Full time workers/students:	35.5 hours/week
Part time workers/students:	17.4 hours/week

■ All commuters ■ Weekday only commuters ■ Week-round commuters

Q1 How many hours do you work/attend education each week?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Hours attending place of work/education varies considerably between those in employment and those in education

Hours worked/attended education per week by rail commuters



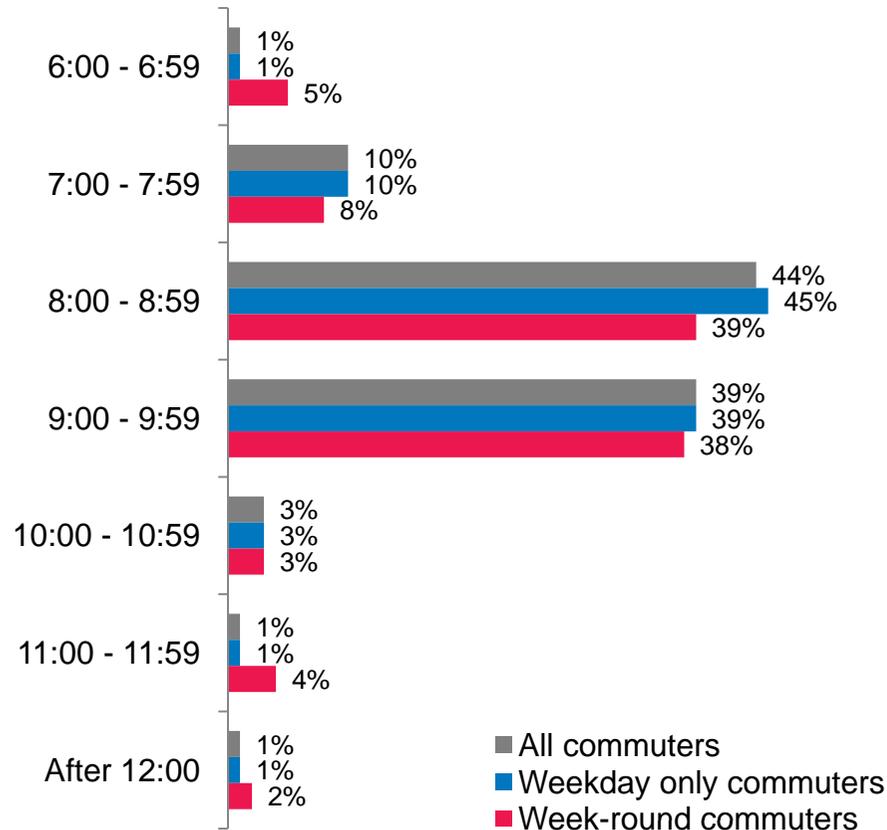
Q1 How many hours do you work/attend education each week?

Base: All commuters (583), Commuting for work (546), Commuting for education (37**)

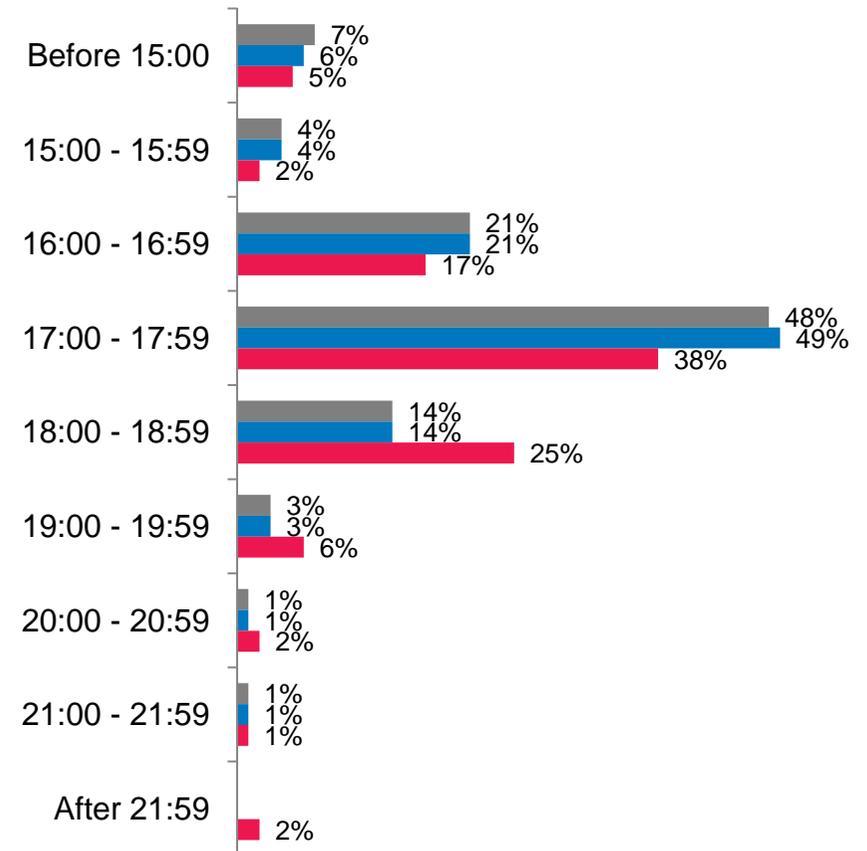
**CAUTION: Low base size

Most commuters work between 'traditional' peak times on weekdays

Time starting work on weekdays



Time finishing work on weekdays

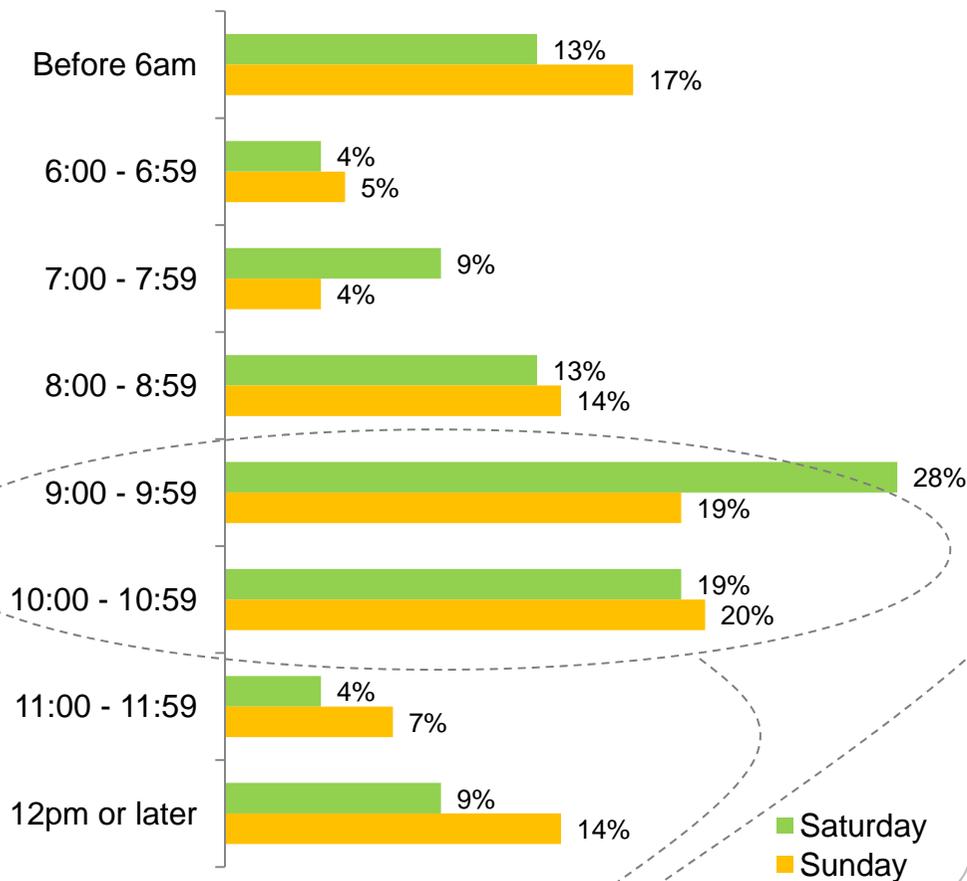


83 per cent of commuters begin work between 8am-10am and finish between 4pm-7pm

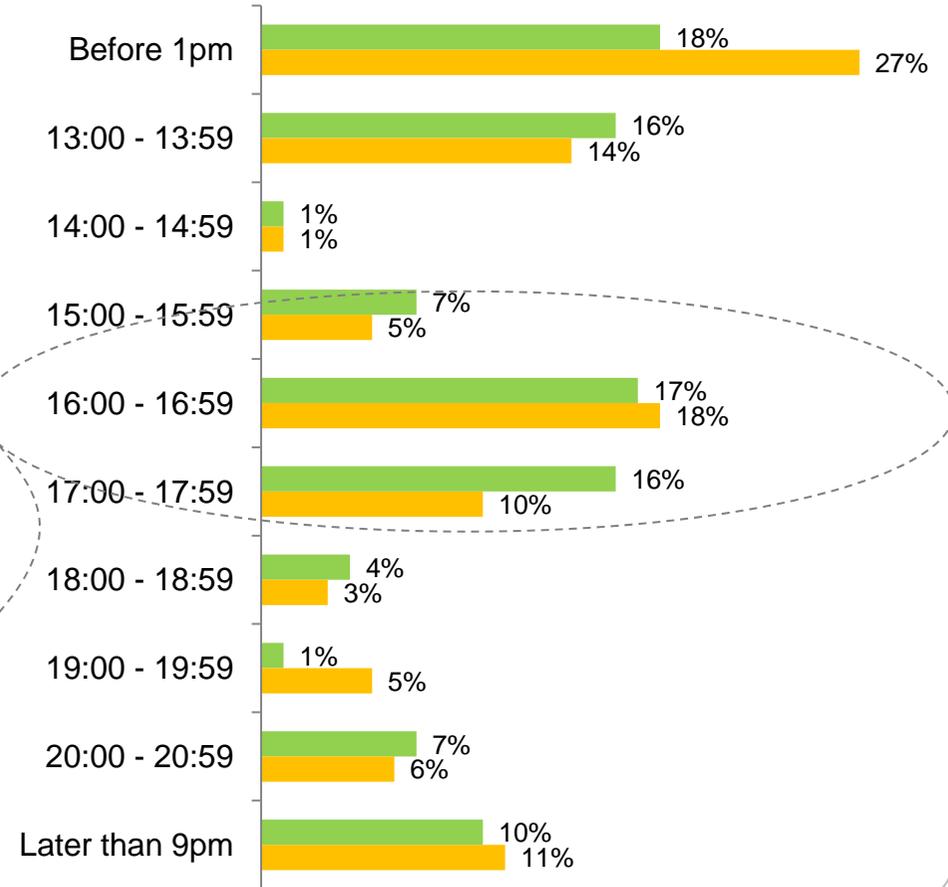
Q16 At what time do you usually start work/education on a weekday (Monday to Friday)?
 Base: All working on weekdays (380), Weekday only commuters (247), Week-round commuters (133)

There is more variance in times of starting and finishing work at the weekend

Time starting work at the weekend



Time finishing work at the weekend



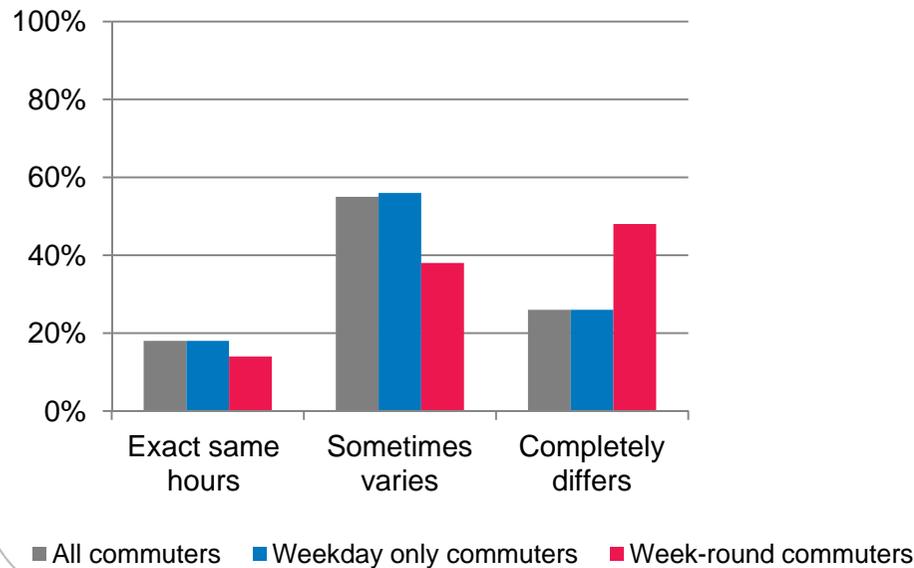
There is still something of a peak, but more variance in times of starting and finishing work at the weekend: *Maybe a requirement to provide more frequent services around these peak times, as for weekdays?*

Q17 When you work/attend a place of education at the weekend, at what time do you normally finish work/education on these days?
 Base: All working on: Saturday (223), Sunday (172)

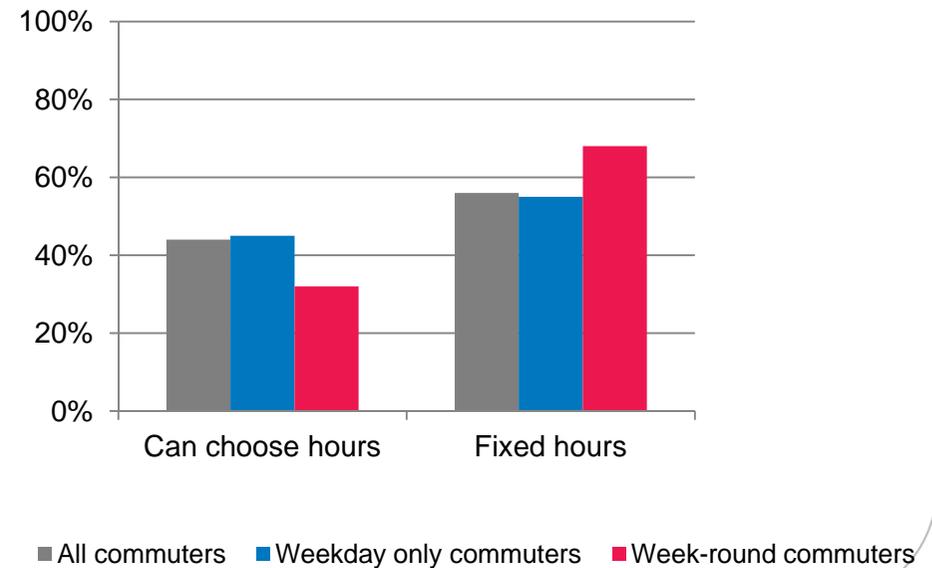
While working hours follow a general pattern, absolute fixed hours are rare

- Less than a fifth of commuters (18 per cent) have completely rigid working hours on a day to day basis
- Weekend commuters have most variance in working hours – this differs from day to day for almost half (48 per cent) of all those who commute at weekends
- Weekend commuters however have the least amount of personal control over their hours of work (hours are fixed for 68 per cent of weekend commuters, as opposed to 56 per cent of all commuters)
- Although weekday commuters have less variance in their working hours, they have more control over this

Variance in hours worked each day



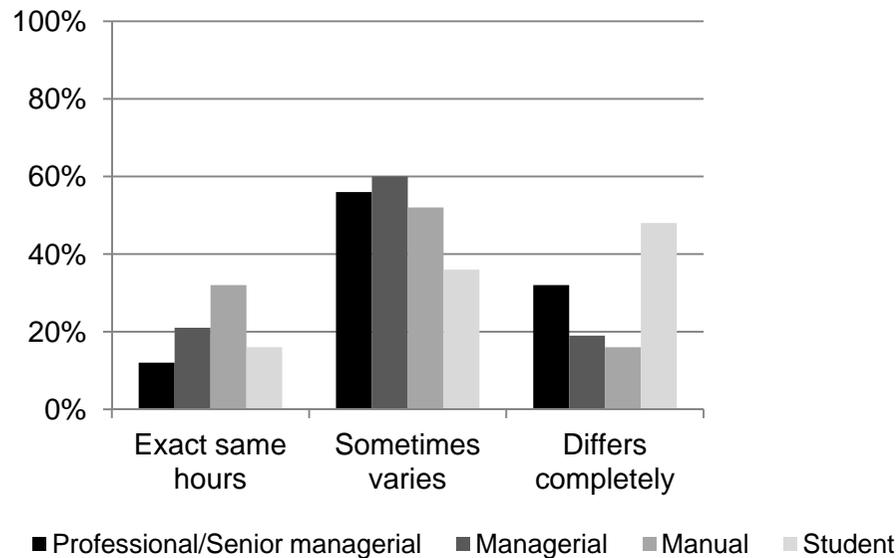
Choice over hours worked each day



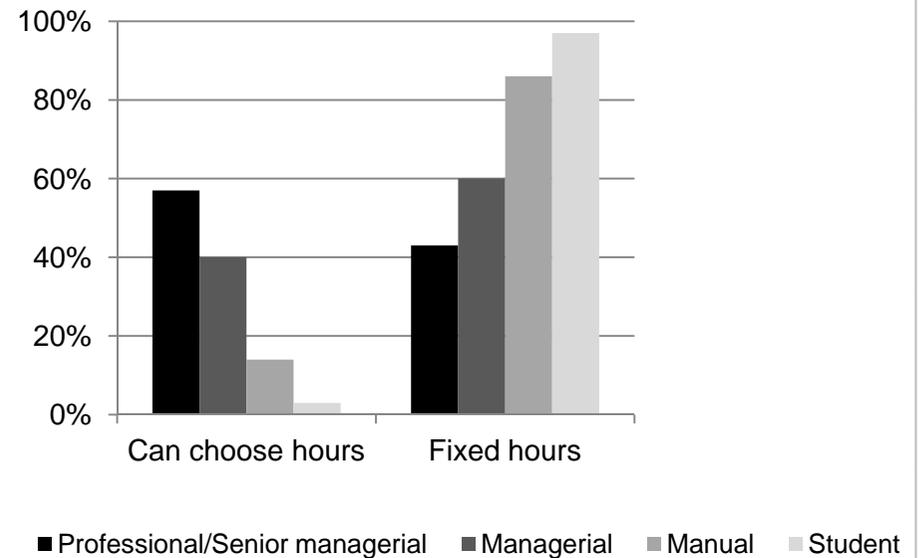
Flexibility in daily working pattern – hours worked by occupation

- The most senior managers have the most control over the hours they work each week

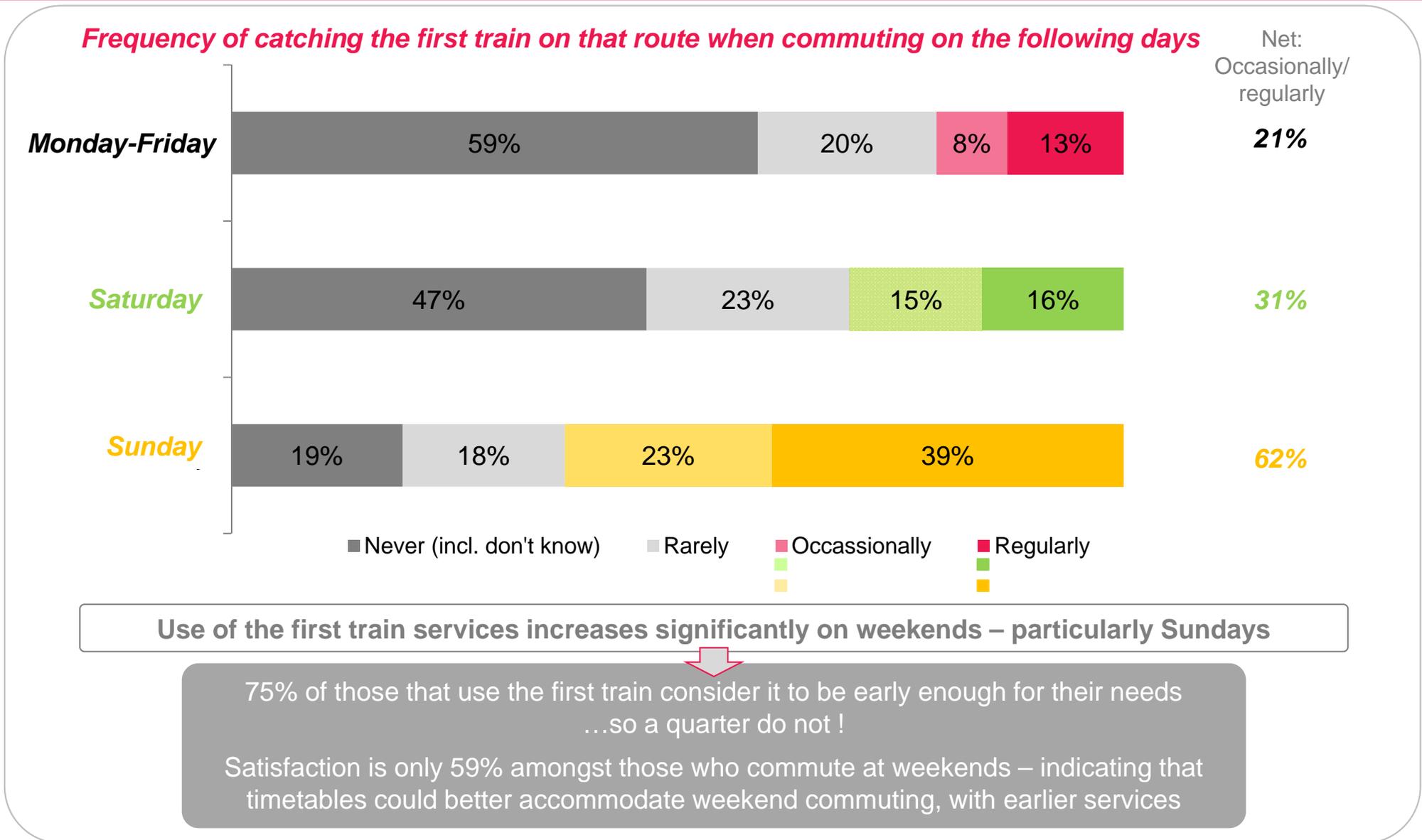
Variance in hours worked each day



Choice over hours worked each day



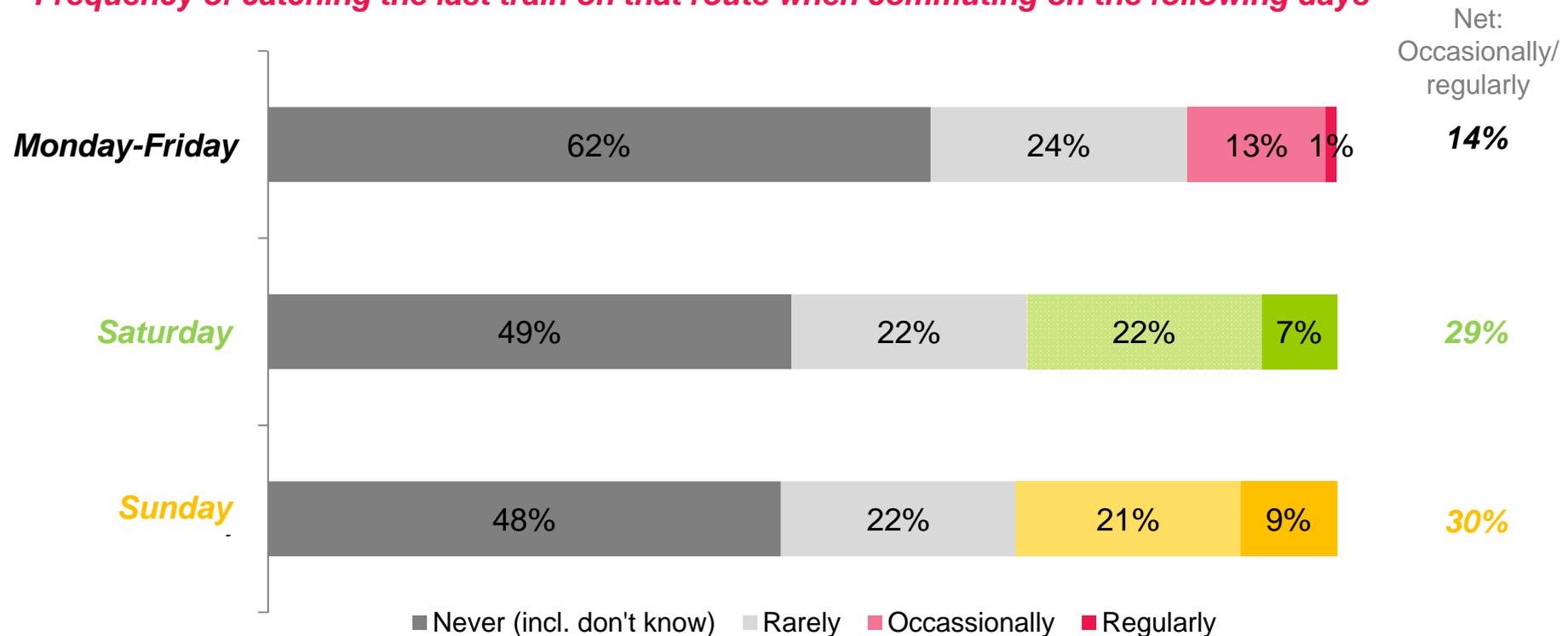
The proportion using the first train for commuting increases at weekends



Q18a How often, if at all, do you get the first train on your route when you commute by train?
 Q18b Is that first train early enough for your needs when commuting?
 Base: All commuting on: weekdays (581), Saturday (223), Sunday (172)

Last trains are also used more at weekends

Frequency of catching the last train on that route when commuting on the following days



Whilst use of the last train is higher at weekends than on weekdays, a lower proportion overall use this than first train services, especially on Sundays

Only 64 per cent of those that use the last train consider it to be late enough for their needs
 Less than half – only 44 per cent – of those who use the last train at weekends are satisfied with this which demonstrates a significant appetite for later trains seven days a week

Q19a How often, if at all, do you get the last train on your route when you commute by train?

Q19b Is that last train late enough for your needs when commuting?

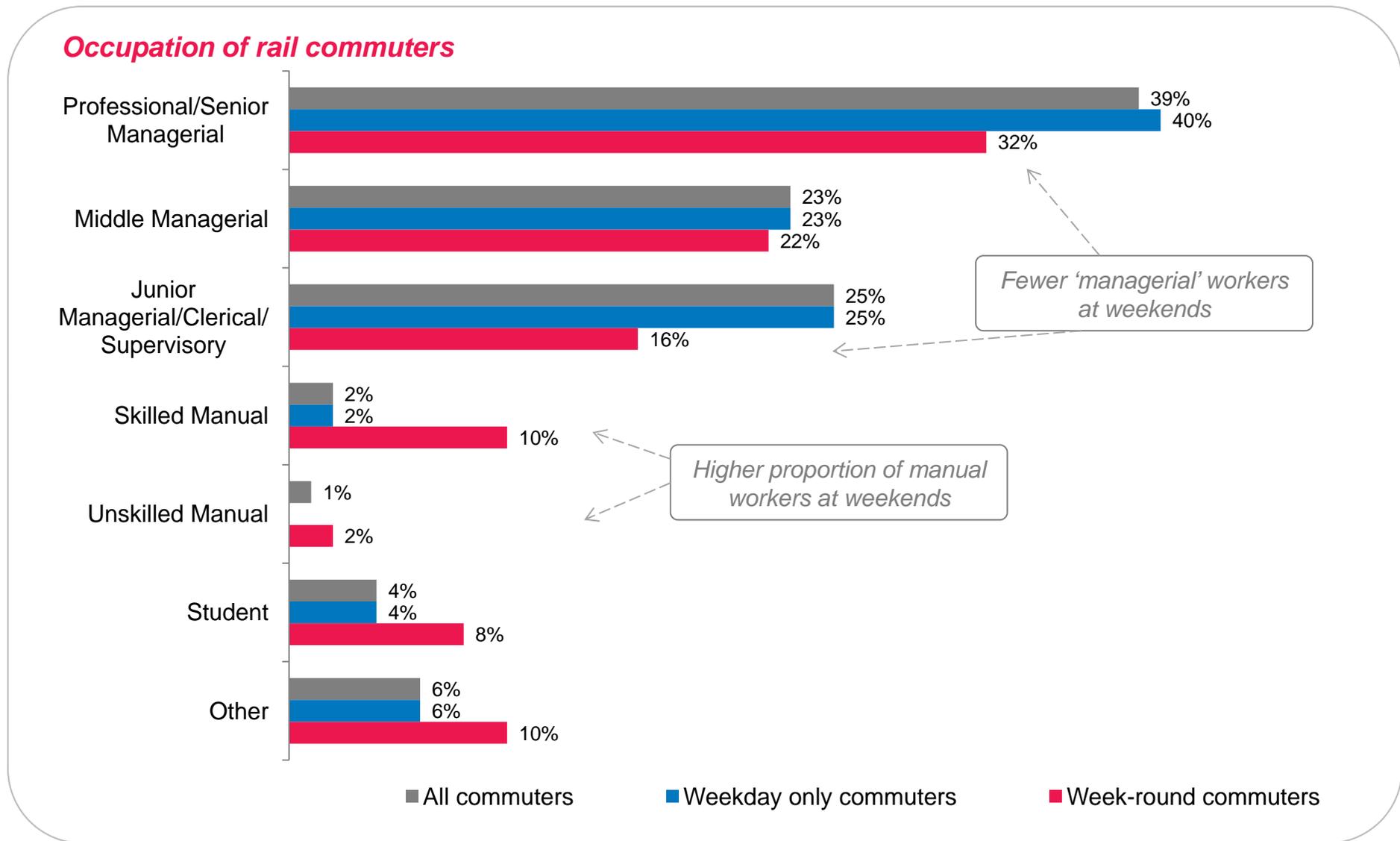
Base: All commuting on: weekdays (581), Saturday (223), Sunday (172)

Who are commuters?

Occupation



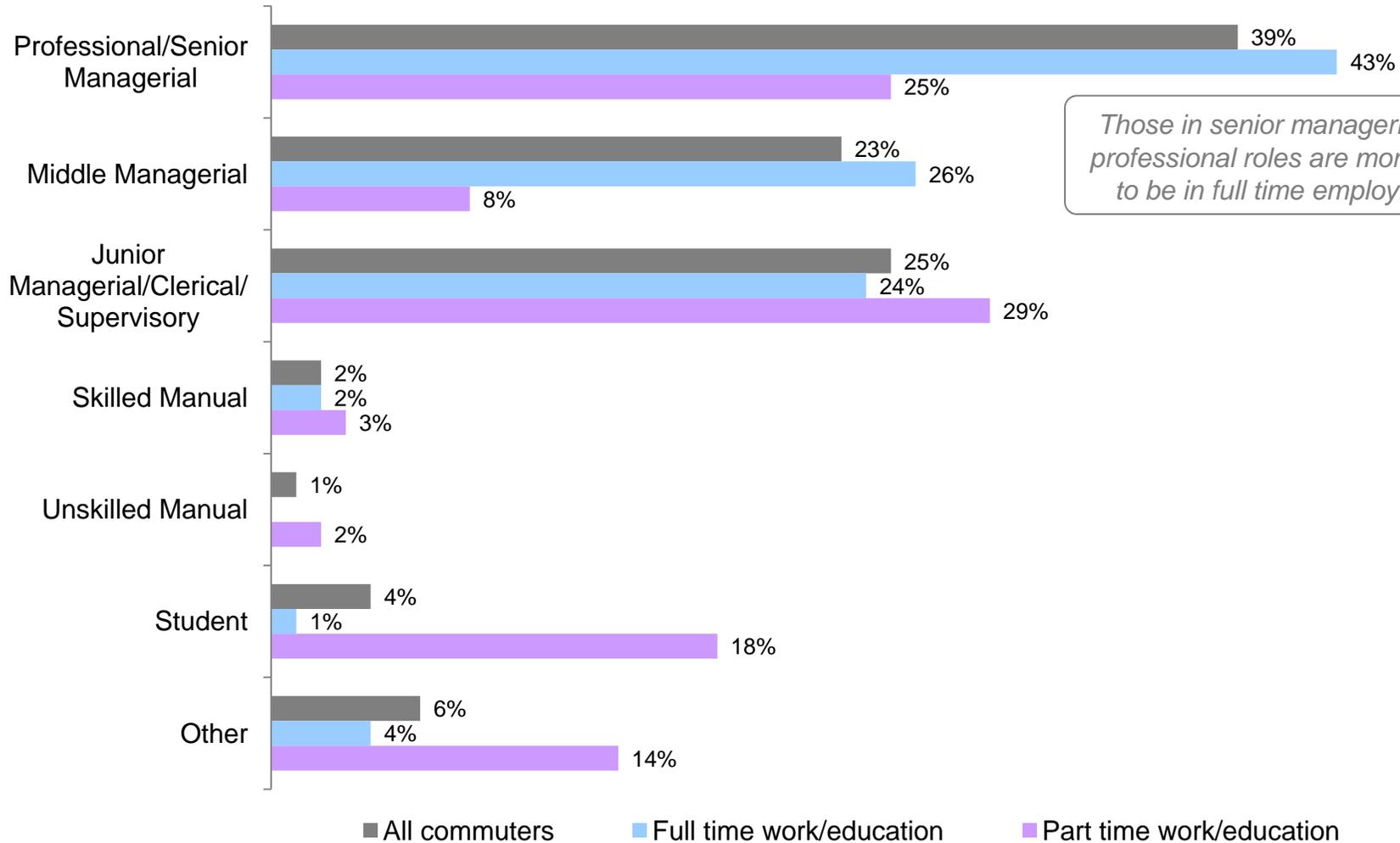
Rail commuters span a range of occupations but more senior managerial grades are most prevalent



Q2a. Which of the following best describes your occupation?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Those working (and so commuting) part time are more likely to be in more junior or manual roles, or in education

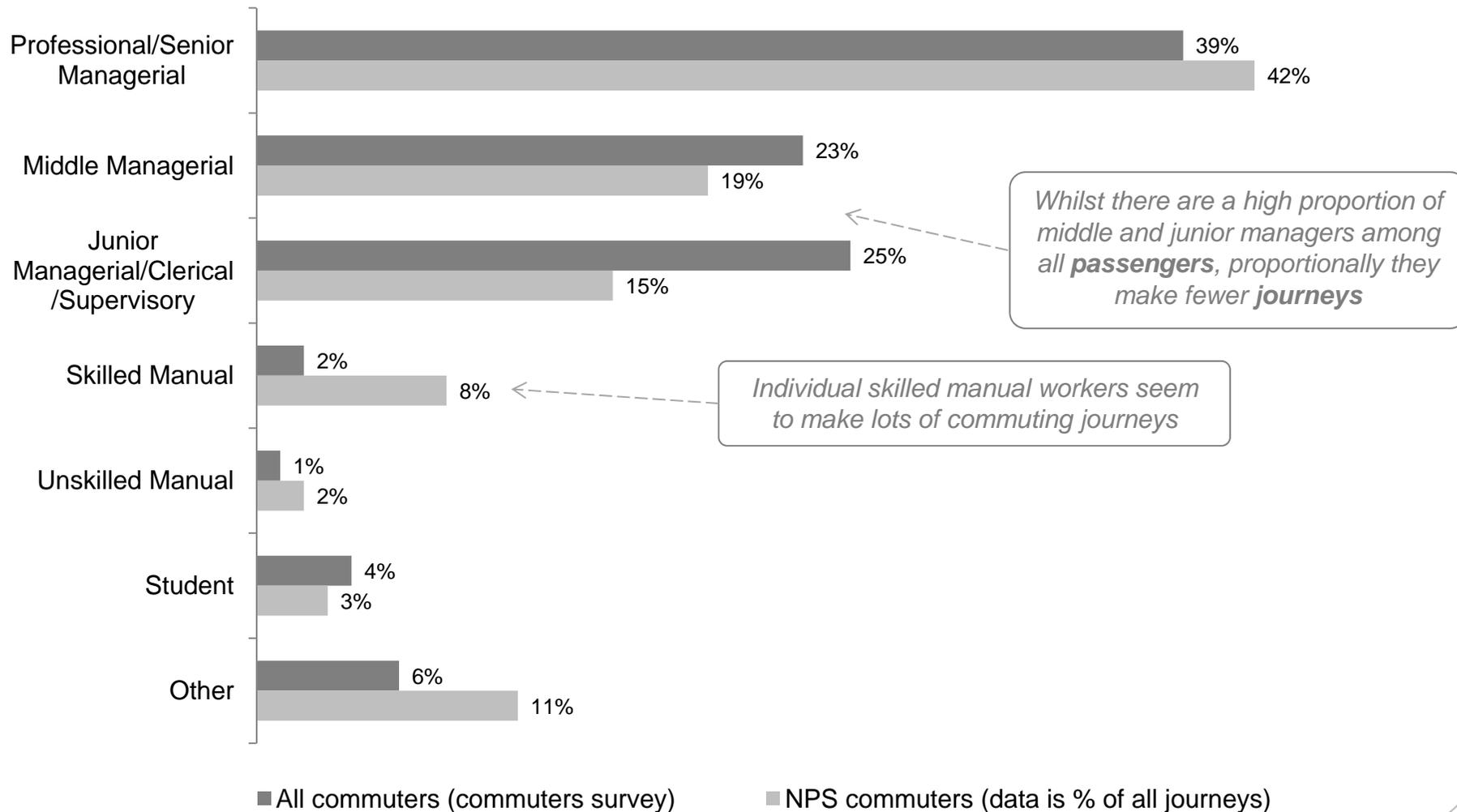
Occupation of rail commuters



Q2a. Which of the following best describes your occupation?
 Base: All commuters (583), Full time (473), Part time (110)

Some occupations seem to make more commuting journeys

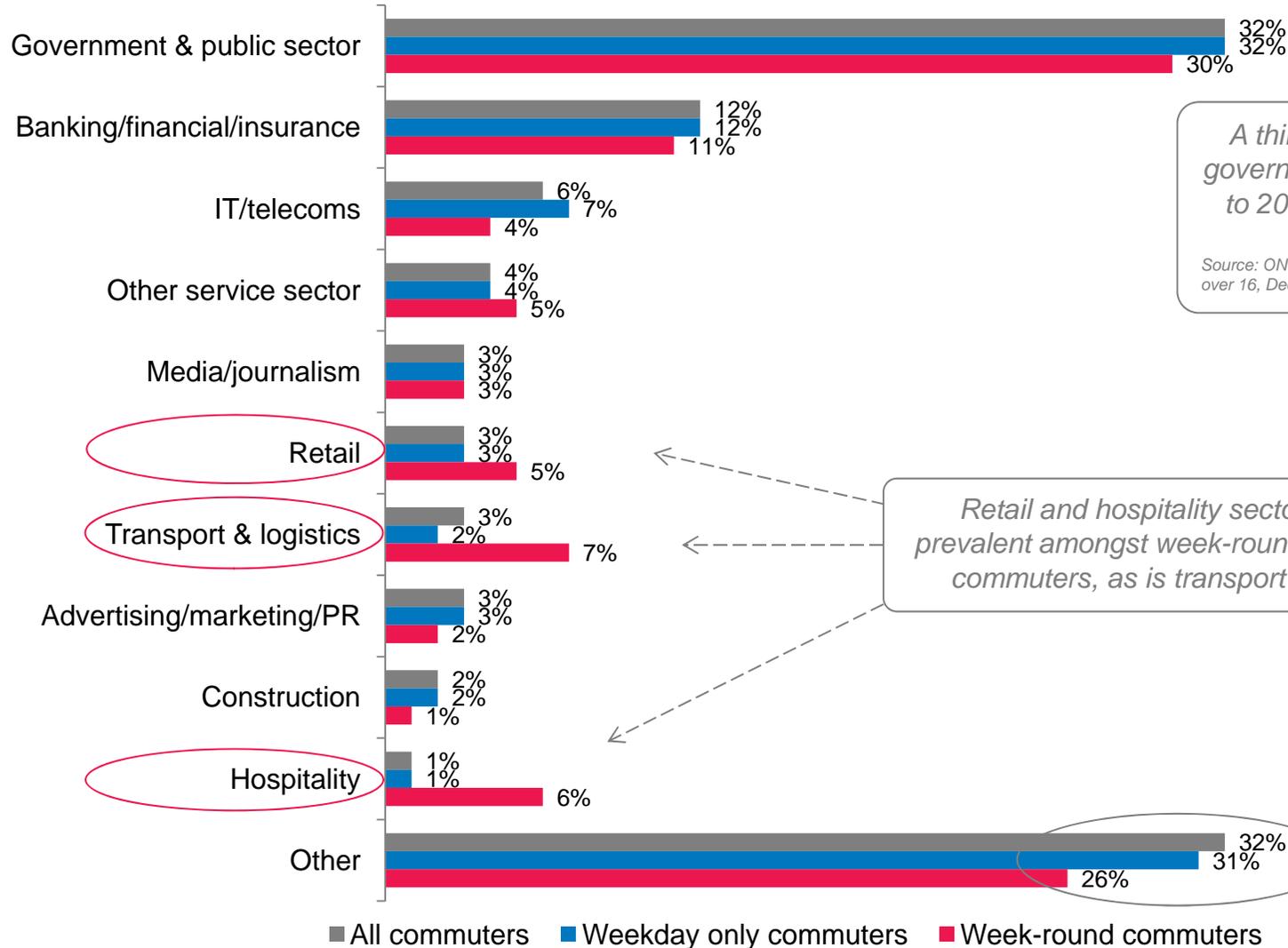
Occupation of rail commuters – comparison with NPS journeys



Q2a Which of the following best describes your occupation?
 Base: All commuters – commuting survey(583), NPS commuters – Spring-Autumn 2012 (24,135)

Public and service sectors are key employers of rail commuters

Organisations by which rail commuters are employed



A third of rail commuters work in government/public sector; compares to 20% of population as a whole*

Source: ONS Labour Market Statistics, UK employed adults over 16, Dec 2010-Dec 2012

Retail and hospitality sectors are more prevalent amongst week-round than weekday commuters, as is transport and logistics

- This includes:
- Charity/Voluntary
 - Legal
 - Education
 - Energy/power

Q2c What kind of organisation do you work for?
 Base: All commuters commuting for work (546), Weekday only only (312), Week-round commuters (234)

The kinds of jobs undertaken by week-round commuters are varied (1)

Government and the public sector employs almost a third (30%) of weekend commuters

Many involved healthcare

Custody nurse
(Professional)

Dispenser in a pharmacy
(Other)

Consultant cardiologist
(Professional)

*Senior community
Mental health nurse*
(Professional)

NHS Manager
(Middle Managerial)

Support worker
(Skilled manual)

Radiographer
(Professional)

Nurse tutor
(Professional)

Other emergency services including the police

Detective Constable
(Skilled manual)

Police Officer
(Professional)

Some in education and academia

*Senior lecturer at
university*
(Professional)

*Professor of the
History of London*
(Professional)

Other 'functional' occupations in local government

Gardener/Greenkeeper
(Skilled manual)

*IT technical
manager*
(Professional)

Crematorium technician
(Skilled manual)

Team Leader, Call Centre
(Middle managerial)

Urban transport manager
(Professional)

Publicly funded arts

Museum curator
(Professional)

*International Project
Consultant in Library*
(Professional)

Mainly 'front line' occupations which operate on a daily basis

Q2a. Which of the following best describes your occupation?

Q2b. And what is your job title?

Base: All week-round commuters commuting for work (234)

The kinds of jobs undertaken by week-round commuters are varied (2)

Banking/financial/insurance (11%)

- Many were in customer services and retail bank management, but there were also several senior professionals

Building society manager
(Middle managerial)

Customer Service officer
(Junior Managerial/Clerical/Supervisory)

Area manager
(Professional)

Telephony based Customer Service Claims Advisor
(Other)

Global end user support
(Middle managerial)

Chief Operating Officer
(Professional)

Director business banking
(Middle managerial)

Transport & logistics (7%)

Cabin crew
(Skilled manual)

Revenue protection inspector
(Middle managerial)

Team leader on East Coast Trains
(Junior Managerial/Clerical/Supervisory)

Operations Compliance Manager
(Middle managerial)

Staff development manager
(Middle managerial)

Hospitality (6%)

Hotel general manager
(Professional)

Waitress
(Unskilled manual)

Hotel sales and revenue manager
(Middle managerial)

Housekeeper
(Unskilled manual)

Tourist Guide
(Other)

Fast food restaurant worker
(Other)

Retail (5%)

Sales assistant
(Unskilled manual)

Property director of a retail company
(Professional)

Branch manager
(Middle managerial)

Baker
(Skilled manual)

Q2a. Which of the following best describes your occupation?

Q2b. And what is your job title?

Base: All week-round commuters commuting for work (234)

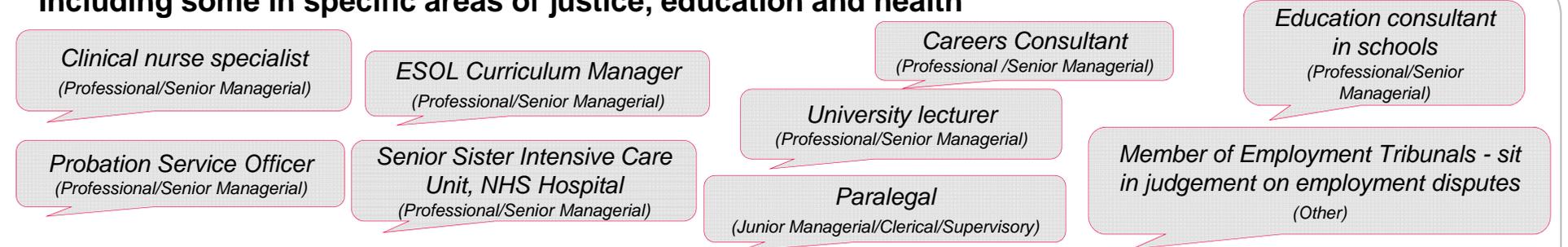
Jobs undertaken by weekday only commuters are largely managerial (1)

Government and the public sector also employs almost a third (32%) of weekday commuters

Managerial positions across central and local government



Including some in specific areas of justice, education and health



Mainly office-based professional/managerial jobs

Q2a. Which of the following best describes your occupation?
 Q2b And what is your job title?
 Base: All weekday only commuters commuting for work (312)

Jobs undertaken by weekday only commuters are largely managerial (2)

Banking/financial/insurance (12%)

Senior Accountant
(Professional/Senior Managerial)

Head of Client Relationship Management
(Professional/Senior Managerial)

Financial analyst
(Professional/Senior Managerial)

Risk analyst
(Junior managerial/Clerical/Supervisory)

Investor Relations Manager
(Professional/Senior Managerial)

Deputy Group Treasurer
(Professional/Senior Managerial)

Pensions manager
(Professional/Senior Managerial)

Compliance director
(Professional/Senior Managerial)

Audit manager
(Professional/Senior Managerial)

Head of Security
(Professional/Senior Managerial)

IT/telecoms (7%)

Chief Operating Officer for an Internet company
(Professional/Senior Managerial)

Principal IT Consultant
(Professional/Senior Managerial)

Computer software test engineer
(Junior managerial/Clerical/Supervisory)

Head of Strategy & Business Change for a global IT Services company
(Professional/Senior Managerial)

Executive assistant
(Junior managerial/Clerical/Supervisory)

Product Manager
(Professional/Senior Managerial)

Other service sector (4%)

Senior Electronics Technician
(Skilled manual)

Account Manager in a translation agency
(Junior managerial/Clerical/Supervisory)

Clean Water Network Optimisation Analyst
(Junior managerial/Clerical/Supervisory)

Q2a. Which of the following best describes your occupation?

Q2b. And what is your job title?

Base: All weekday only commuters commuting for work (312)

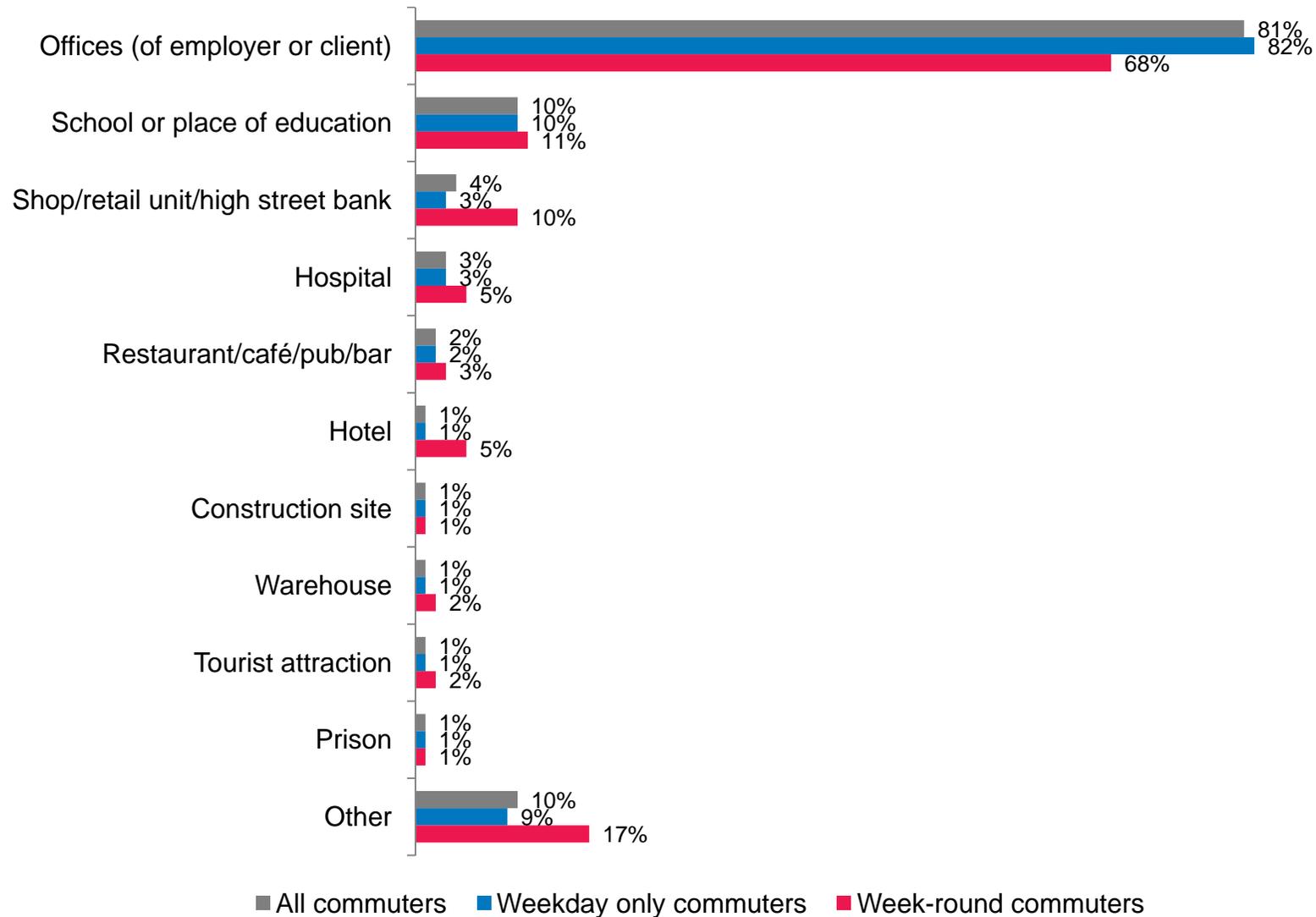
Who are commuters?

Locations worked



Most commuters travel to an office, although a little less so for week-round commuters

Places of work for rail commuters



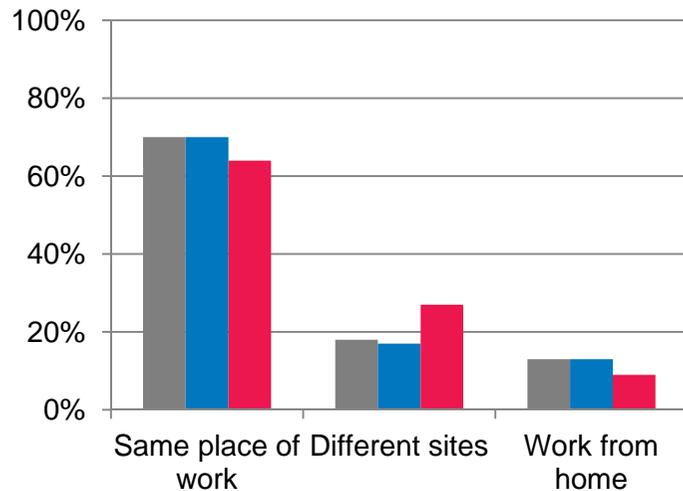
Q3b Other than any occasions when you work at home, which of the following do you work at?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Flexibility in places of work – locations worked

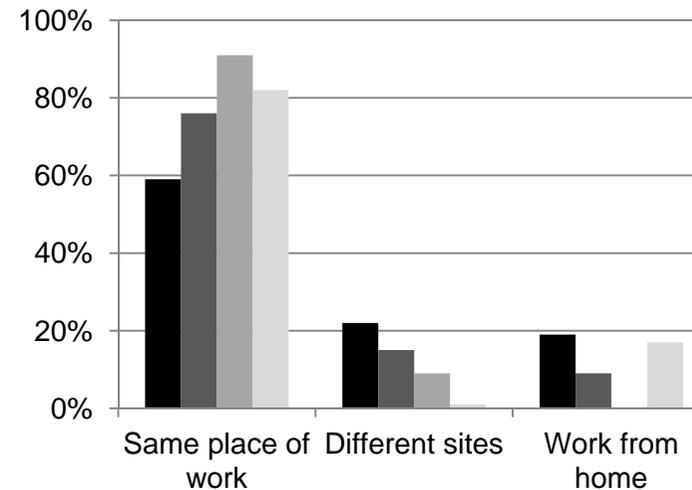
Usual place of work or study

- Most commuters travel to the same place everyday
- Weekend commuters are more likely than weekday commuters to work from different sites, but are less likely to work from home (weekend commuters more likely to do 'face-to-face' or 'on location' work)
- Manual workers are the most static ('on location')
- Senior managerial have the most varied locations of work, including from home
- Students also have a high incidence of working from a home location
- (Part time workers/students are also more likely to work from home or from different sites than full time commuters)

Usual places of work/study by commuter type



Usual places of work/study by occupation



All commuters
 Weekday only commuters
 Week-round commuters
 Professional/Senior managerial
 Managerial
 Manual
 Student

Working patterns indicate that a substantial proportion of commuters – both on weekdays and weekends, could benefit from more flexible ticket options if introduced in future

Q3a Do you usually work/study at the same site each day?
Base: All commuters (583)

Commuters tend to travel from 'peripheral' areas to regional centres, but alternative commuting patterns also exist

As is well established...

- **Most commuters travel to large cities for work or education**
 - For example, only 1 per cent of outbound commuting journeys begin in central London, but 45 per cent of our sample end these journeys at central London termini*
- **Many commute from suburban areas or smaller towns to the principal city in that region**
 - This is true for commuting from home counties/Greater London to central London in the south east, as well as for other regions elsewhere in the country

However, alternative commuting behaviour does also exist...

- **Although London is an important destination, rail commuters travel to a wide range of areas across the country**
 - e.g. Edinburgh, Manchester, Aberdeen, Bristol, Birmingham, Cambridge, Cardiff, Glasgow, Leeds, Liverpool, Leicester, Nottingham, Reading, Swansea, York
- **Some commuters make interurban journeys, commuting from one city to another**
 - These also tend to be in the same general region, and with outbound commuting direction from smaller to larger cities
- **London in particular also draws commuters from much further afield than its 'region' – commuters travel here from all over the country**
- **A small number also 'reverse' commute, from a larger city to a smaller location or suburban area**

Commuters tend to travel from 'peripheries' to regional centres

Most commuters travel to large cities for work or education

- Only 1 per cent of commuters sampled begin their outbound journey from home to work/education at a central London station, however 45 per cent of our sample end these journeys at central London termini
 - Similarly less than 1 per cent begin their outbound commute in Manchester and Edinburgh, but 4 per cent and 2 per cent of the sample ended in these locations respectively
 - Some also travel to other cities such as Aberdeen, Bristol, Birmingham, Cambridge, Cardiff, Glasgow, Leeds, Liverpool, Leicester, Nottingham, Reading, Swansea and York

*Note: The sample shows a high proportion of 'London' commuters, however, this is a likely function of the bias towards commuters in the south east in the NPS recontact database as a result of NPS sampling journeys – of which these commutes represent a large proportion of all rail journeys made. Data for this survey was **not** weighted by region.*

Many travel from suburban areas or smaller towns to the principal city of that region

This is true for London in the south east, and for other regions elsewhere in the country

- For those commuting into London, travel is mainly from the home counties to central London
 - e.g. from Grays/Chemsford/Colchester (Essex), High Wycombe/Reading/Windsor/Maidenhead (Berkshire), St Albans (Herts), Ashford (Kent), Worthing/Brighton/Hove (Sussex)
- ...and some journeys begin within the greater London area itself
 - e.g. from Wimbledon, Croydon, Herne Hill
- This is mirrored in across other regions:
Beverley → Hull, Stalybridge → Manchester Oxford Road, Pontypridd → Swansea, Thornaby → Newcastle

There is also evidence of intercity and long distance commuting

Some commuters make interurban journeys, commuting from one city to another

York → Leeds, Norwich → Nottingham, Derby → Sheffield, Leicester → Nottingham, Liverpool → Sheffield,
Manchester Oxford Road → Liverpool Lime Street,

- These commutes also tend to follow the principles of being within the same region and most commute from slightly smaller to larger cities, as above

London in particular also draws commuters from much further afield

- Many travel to London from outside of the south east region
 - Including *from* Hull, Swansea, Carlisle, Halifax, Leeds, Taunton, Scarborough
- The vast majority of commuters making these long distance ending in London are in Professional/Senior Managerial roles (however, some are in middle and junior managerial positions)
- A few also make long distance commutes not ending in London (e.g. Durham → Milton Keynes)

A small number also 'reverse commute' from a larger city to a smaller town or suburban location

London Paddington → Slough, London Victoria → Clapham Junction, Manchester → Wellington, Shropshire

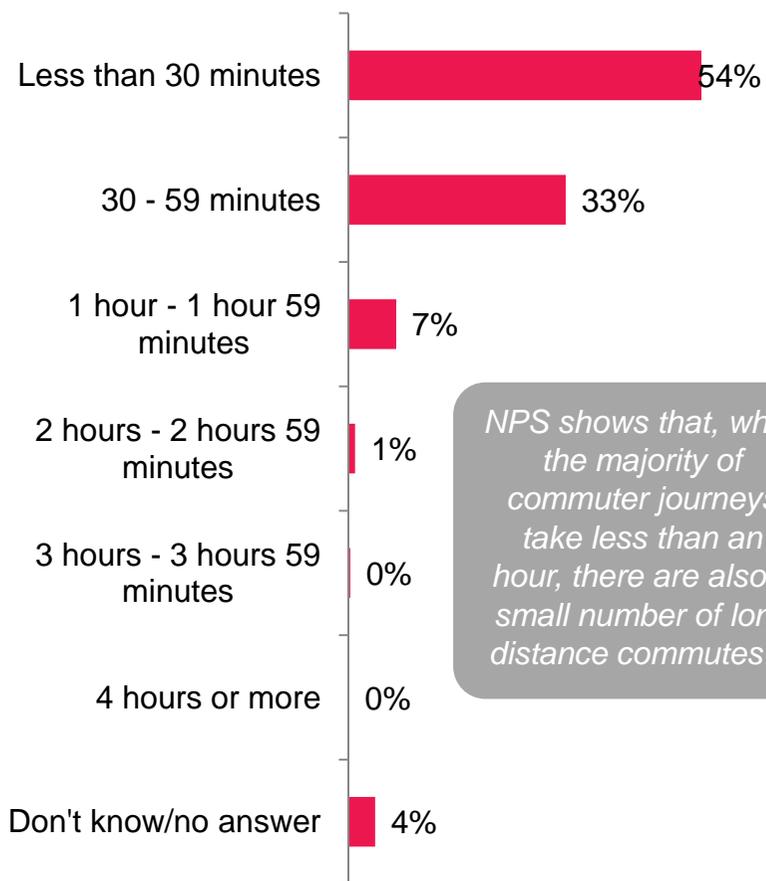
Although established commuting patterns between suburban areas and dormitory towns are still dominant, a range of commuting journeys are being made by rail

Stations travelled between by week-round commuters tend to follow the same principles as other commuters

Length and frequency of journeys

Length of commuter journeys

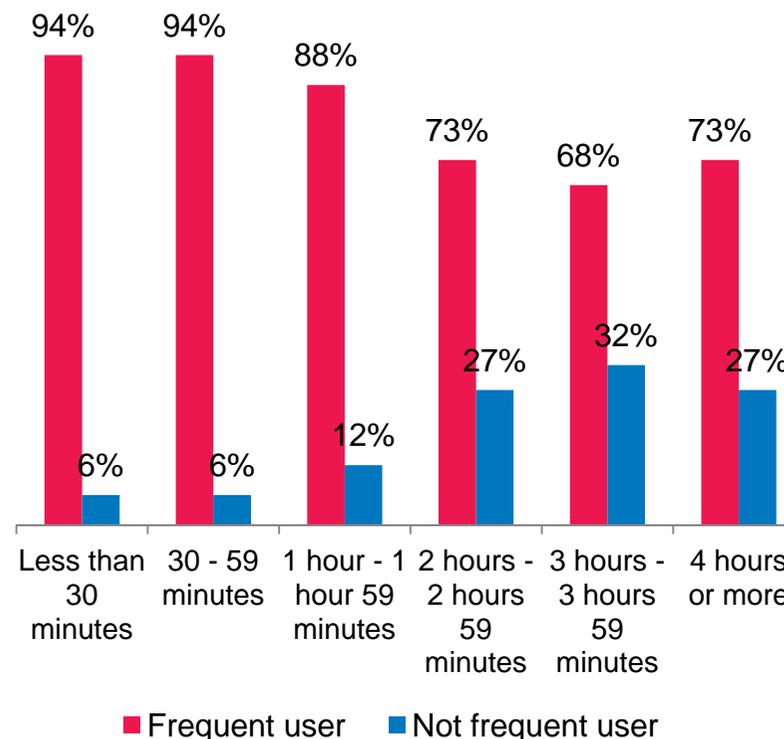
(NPS Spring/Autumn 2012)



NPS shows that, while the majority of commuter journeys take less than an hour, there are also a small number of long distance commutes...

Length of commuter journeys

(NPS Spring/Autumn 2012)



"Frequent user" = make this train journey at least once or twice a month

...and even very long distance commutes are made quite frequently

Q31. How long were you on the train that you got on at xxx station? / Q32. How often do you make the train journey that you were on today when handed this questionnaire?
Base: NPS Spring/Autumn 2012, commuter journeys (25212)

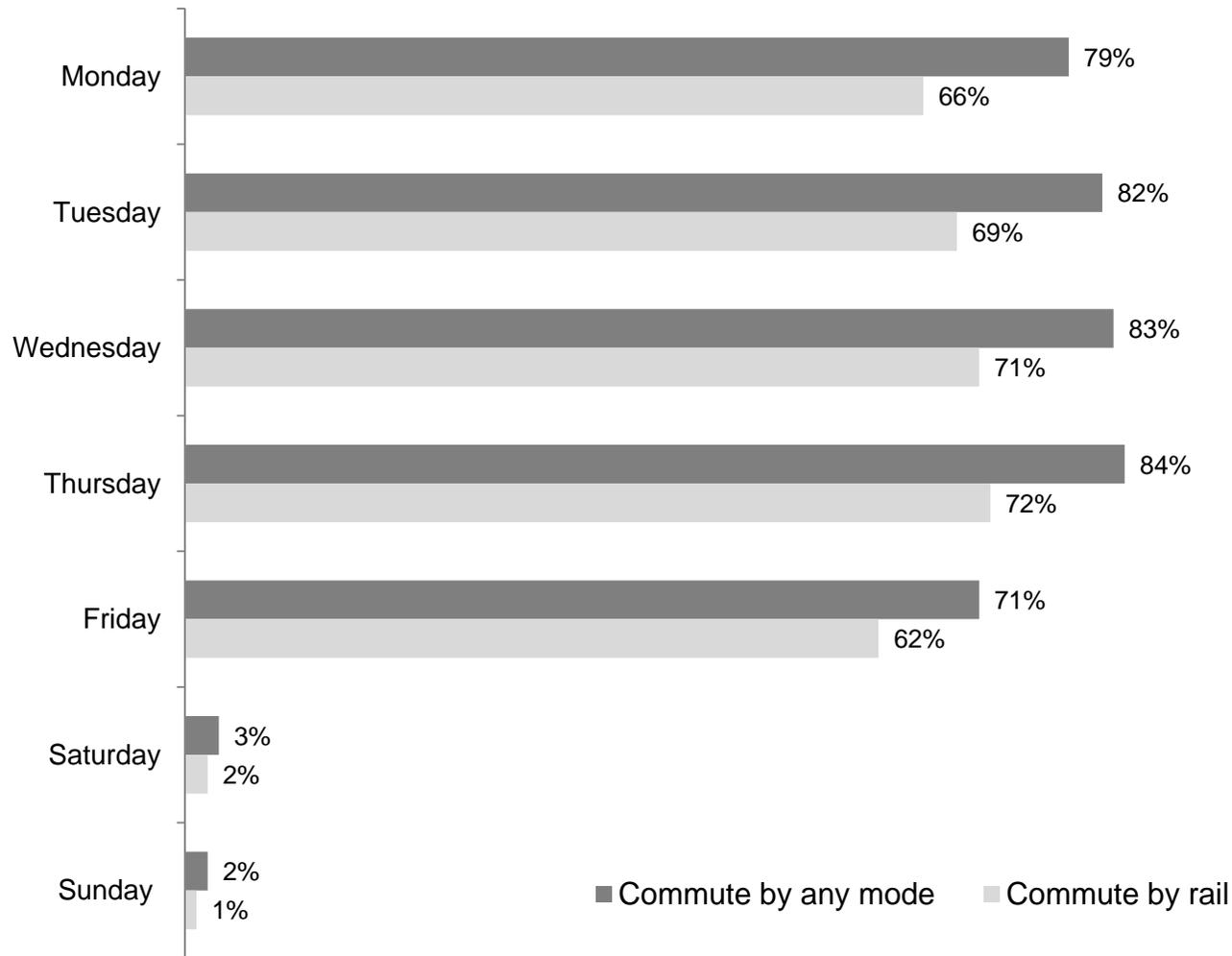
Who are commuters?

Use of other modes



Rail commuters tend to travel by train for most of their commuting journeys...

Days commuted in the last 7 days



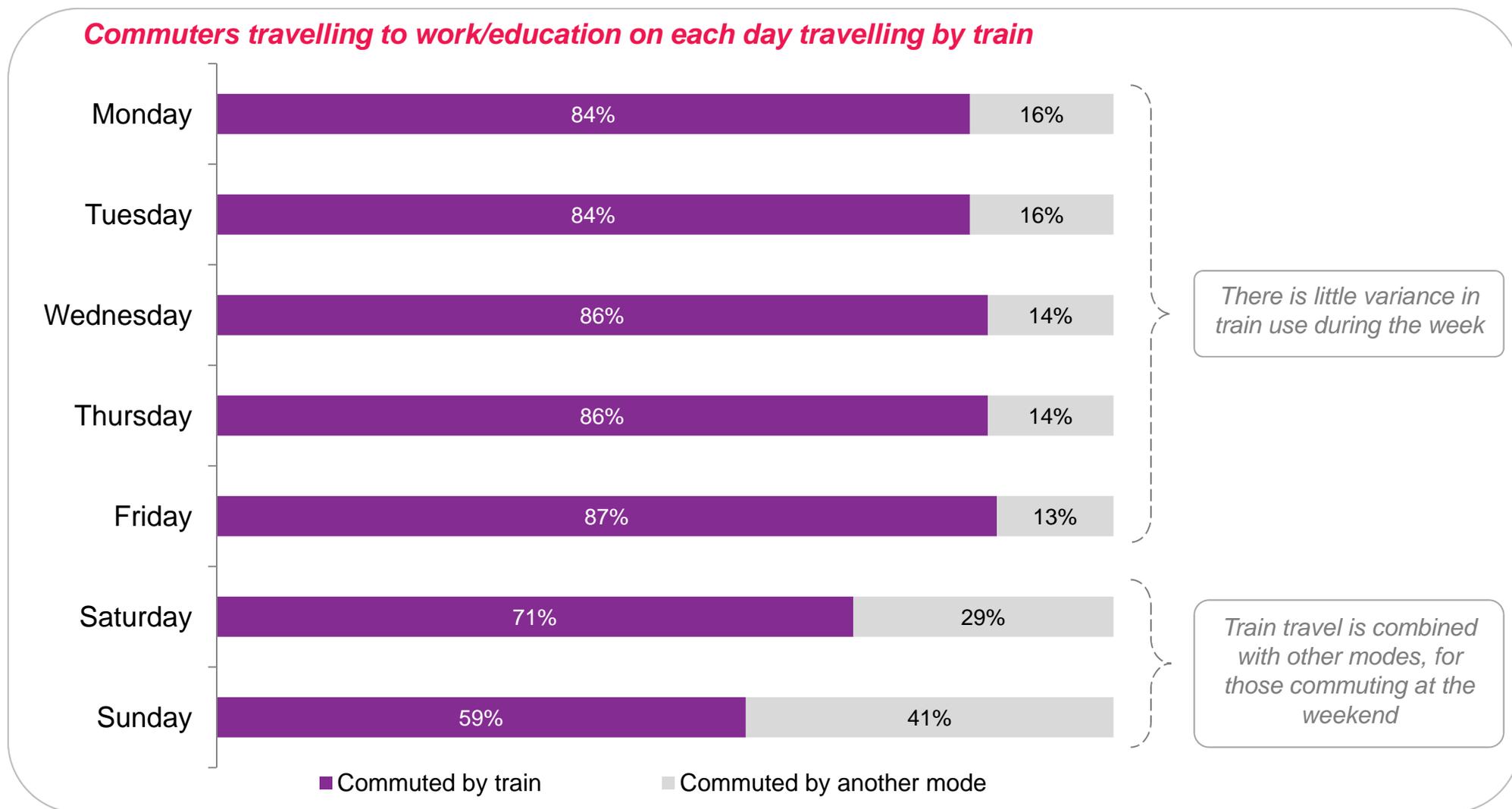
Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?

Q7 Of the days that you commuted to work/education last week, which days did you commute by train as your main mode?

Base: All commuting to work/education on each day in the last week

Monday (465), Tuesday (476), Wednesday (469), Thursday (469), Friday (420), Saturday (97), Sunday (67)

...although those commuting at weekends are also likely to travel by other modes



Q6 Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education whether by train or any other mode of transport?

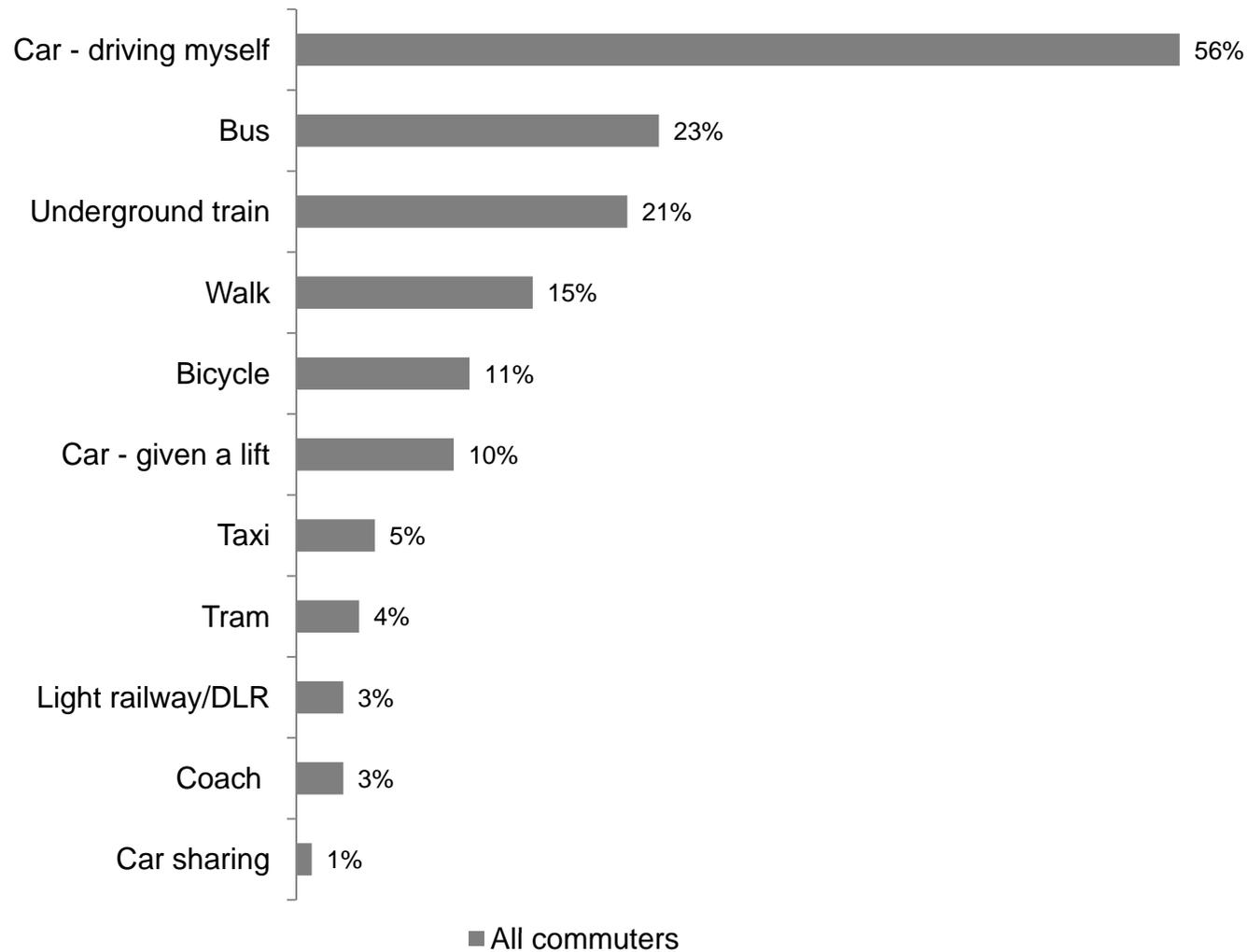
Q7 Of the days that you commuted to work/education last week, which days did you commute by train as your main mode?

Base: All commuting to work/education on each day in the last week

Monday (465), Tuesday (476), Wednesday (469), Thursday (469), Friday (420), Saturday (97), Sunday (67)

Those that do use other modes for their main commute use a range of alternatives

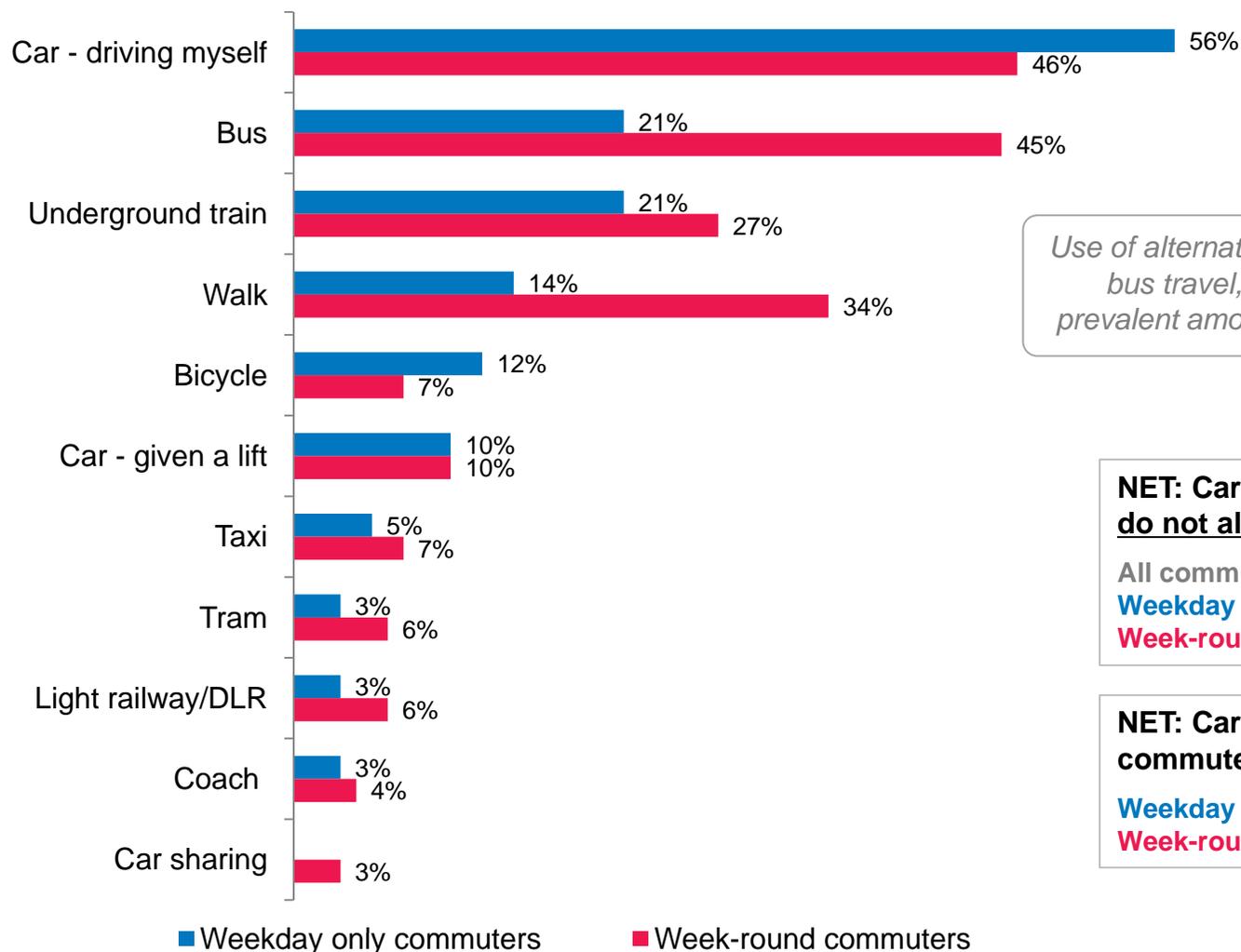
Modes also used by rail commuters for main commuting journey



Q10 What other mode(s) of transport do you use as the main mode to commute to work/education?
Base: All commuting by a mode other than train (260)

Week-round commuters use more alternative public transport

Modes also used by rail commuters for main commuting journey



Use of alternative public transport, particularly bus travel, and walking is much more prevalent amongst **week-round commuters**

NET: Car use by commuters who do not always travel by train

All commuters	67%
Weekday only	66%
Week-round	59%

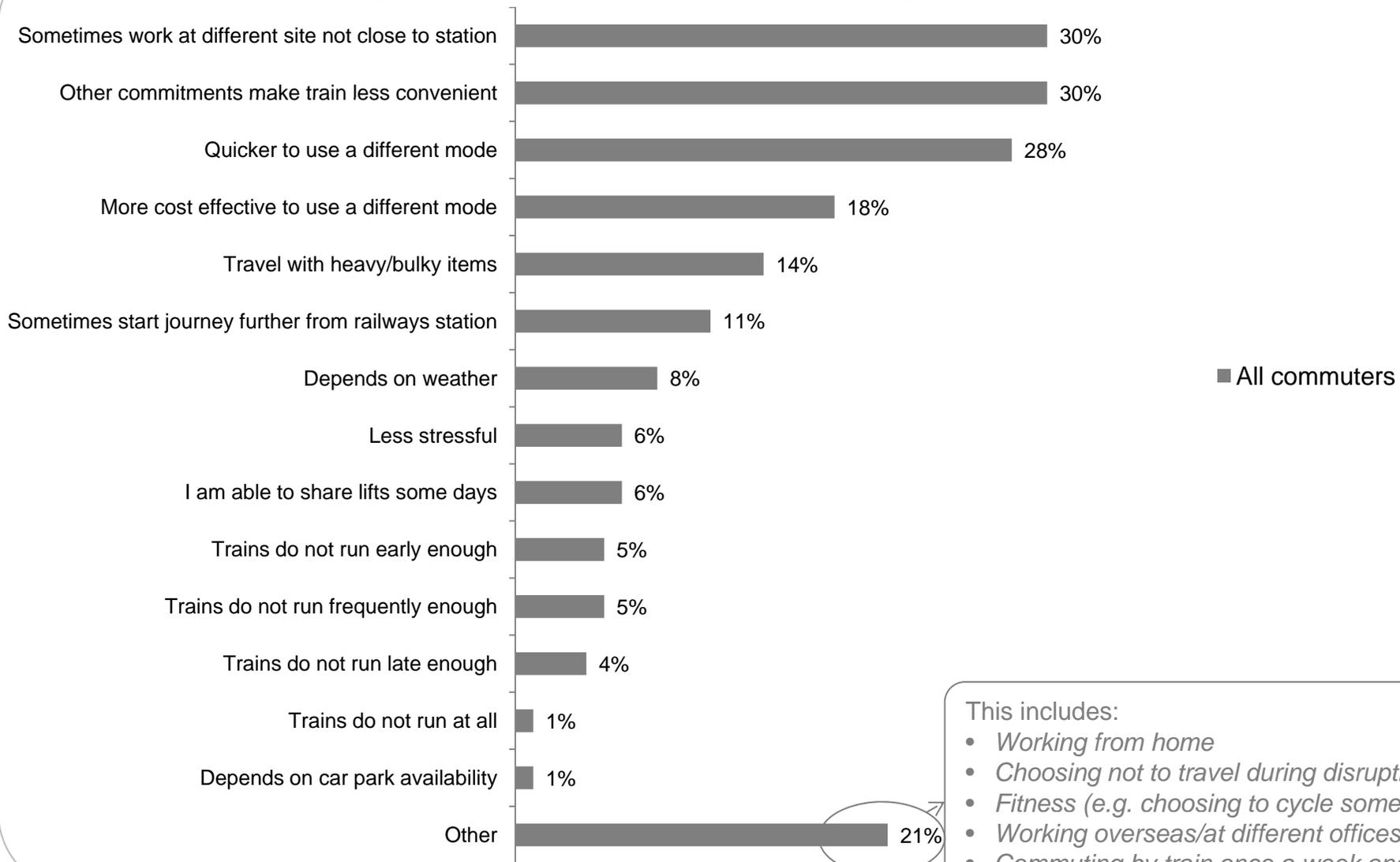
NET: Car use amongst all commuters

Weekday only	11%
Week-round	21%

Q10 What other mode(s) of transport do you use as the main mode to commute to work/education?
 Base: All commuting by a mode other than train (260), on weekdays (133) on weekends (127)

Convenience is the key reason for using other modes

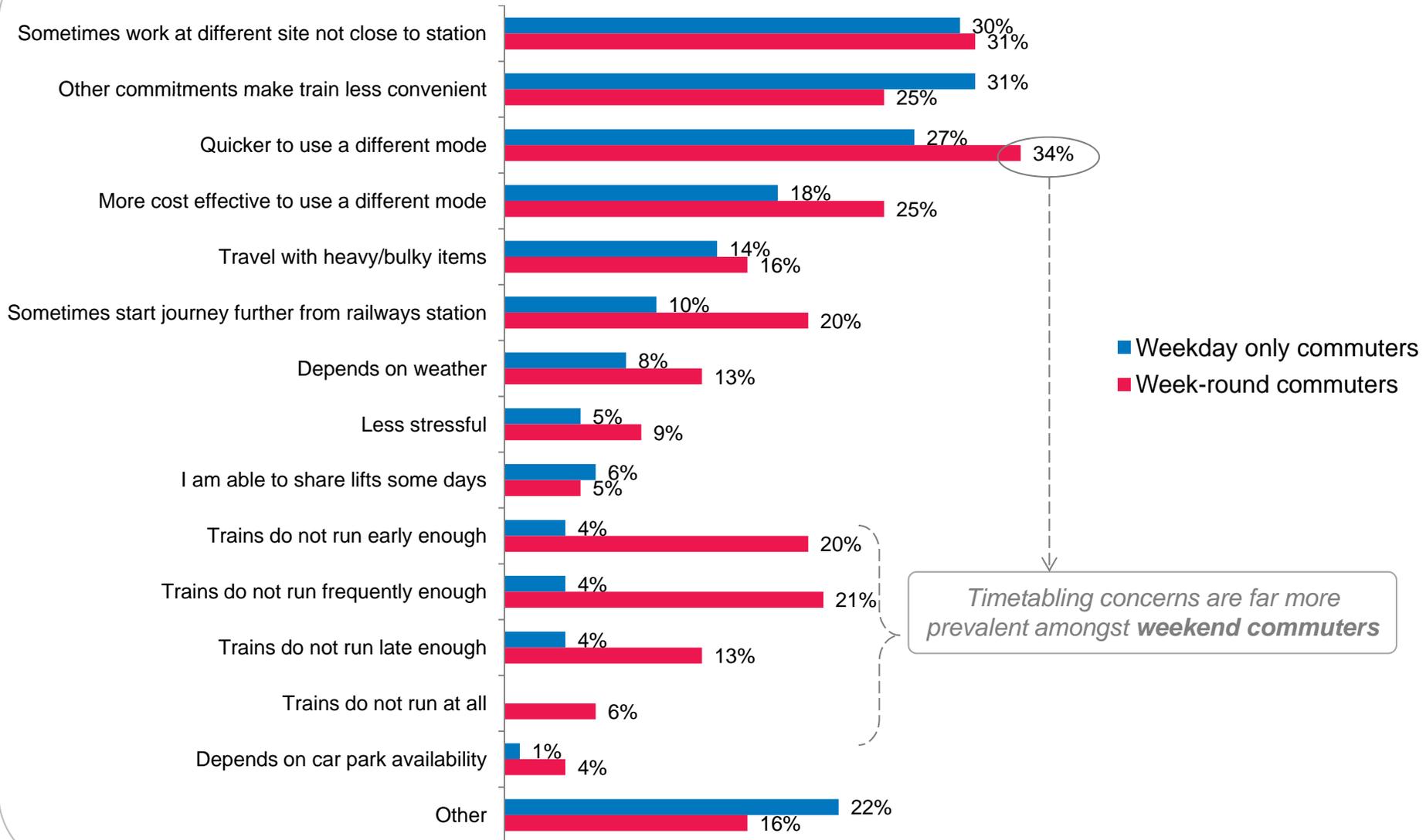
Reasons for deciding not to commute by train on some days



Q13 Why do you decide not to commute by train on some days?
Base: All commuting by a mode other than train (260)

Timetabling concerns are more prevalent amongst weekend commuters

Reasons for deciding not to commute by train on some days

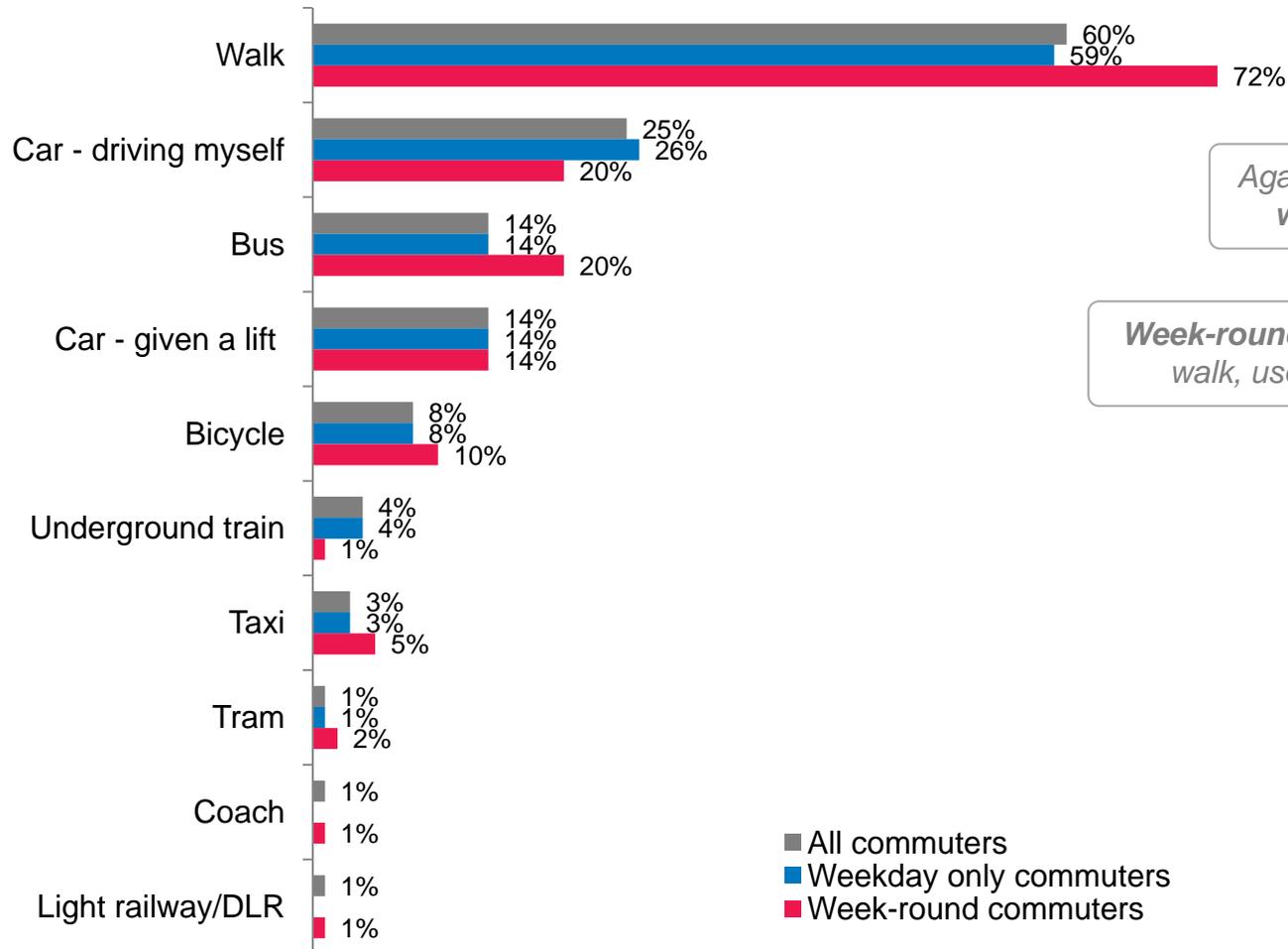


Q13 Why do you decide not to commute by train on some days?

Base: All commuting by a mode other than train (260), on weekdays (133) on weekends (127)

Travel to origin stations is mainly on foot whilst car is also an important alternative

Modes used to travel from home to railway station for outward commuting journey



Again, car use is higher amongst weekday only commuters

Week-round commuters are more likely to walk, use the bus or travel by bicycle

NET: Car use

All commuters	39%
Weekday only	40%
Week-round	34%

Q20 Which method(s) of transport do you use most often when travelling from your home to the National Rail station at which you start your journey?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Who are commuters?

Commuting behaviour over time

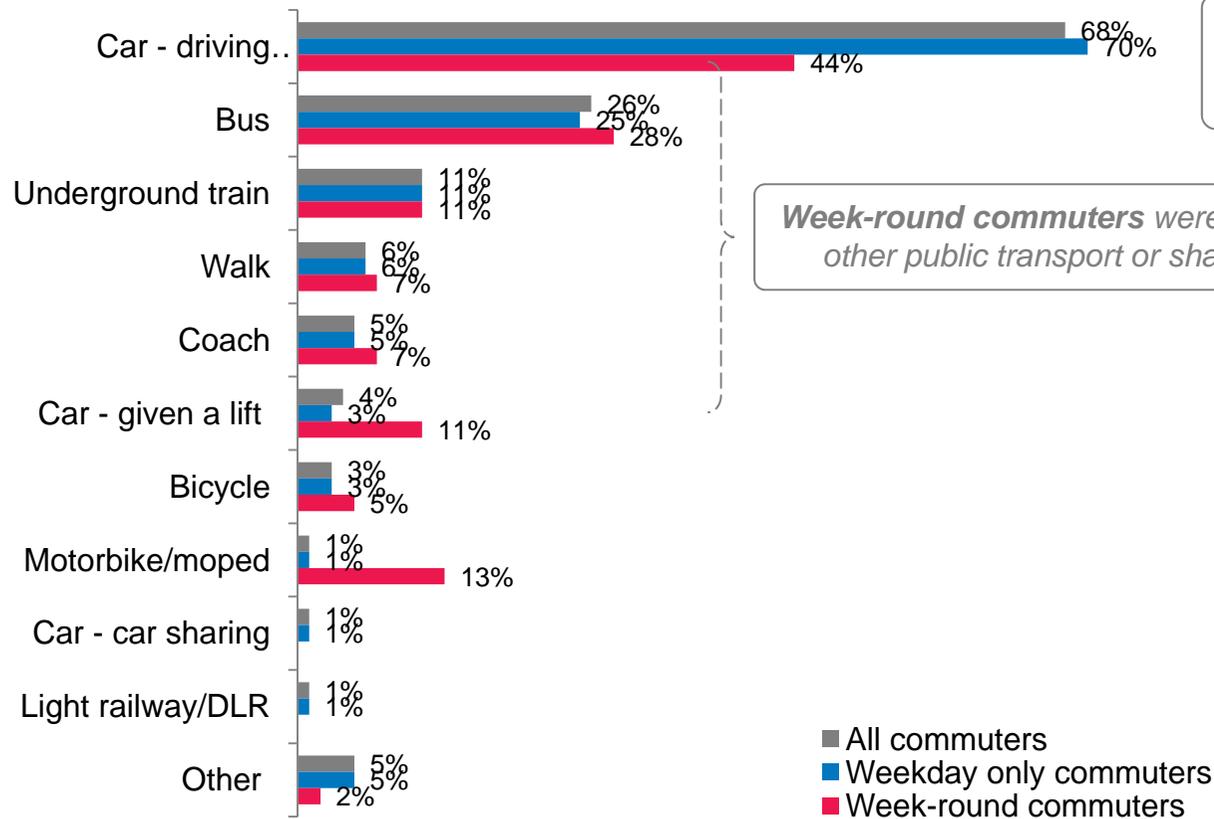


A quarter of rail commuters have commuted using another mode previously

Across all commuters groups (weekend and weekday):

- 75 per cent of commuters have only ever commuted by train on the route on which they currently travel
- 25 per cent used to travel by another mode of transport before switching to train

Modes used before switching to train



Car was an important mode for all groups, particularly **weekday only commuters**

Week-round commuters were more reliant on other public transport or shared transport

NET : Car use	
All commuters	73%
Weekday only	73%
Week-round	55%

Q25 Before you first started making this journey by train, did you previously make this journey by any other mode of transport?

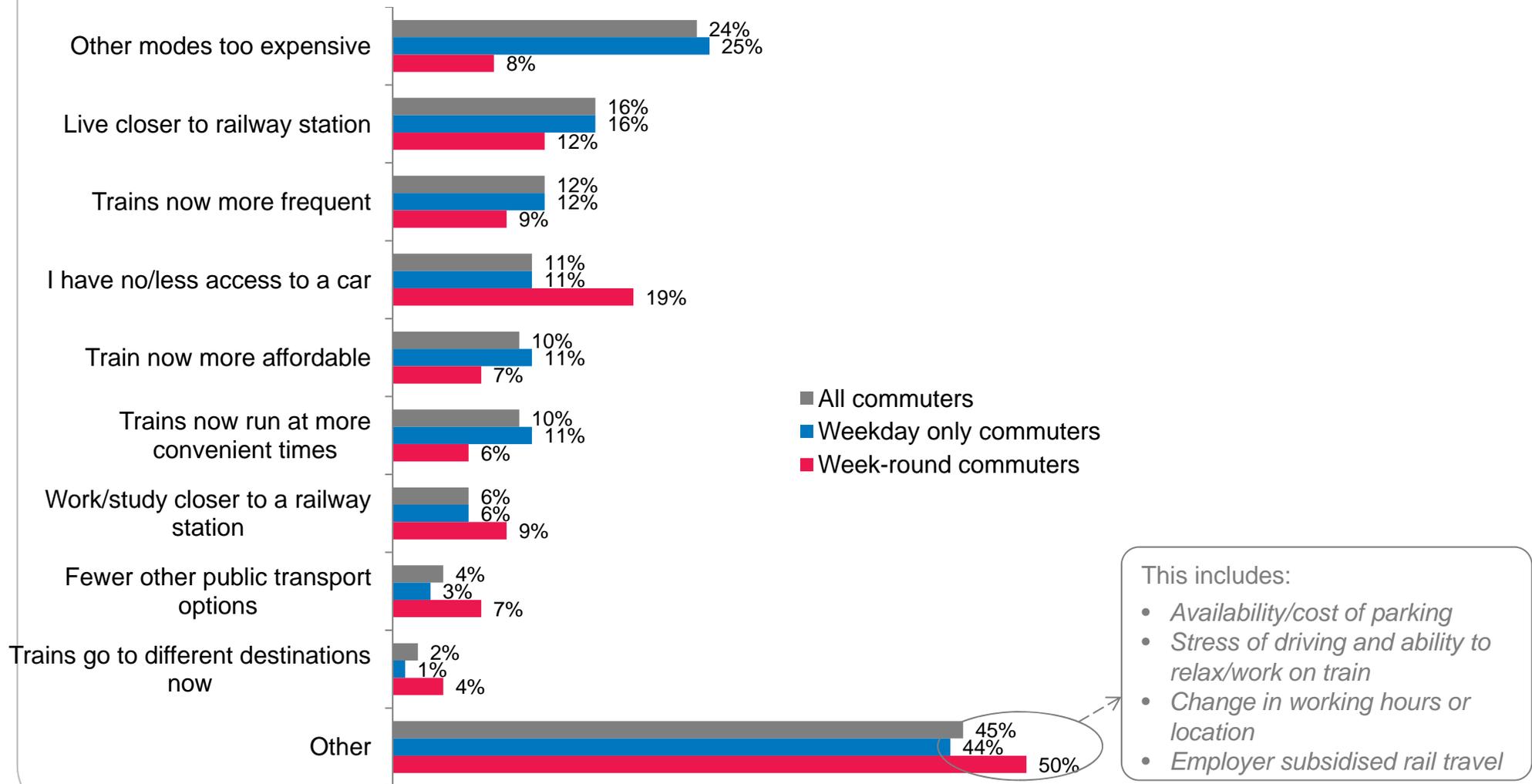
Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Q26 Before you started making this journey by train, which other main mode(s) of transport did you use to make this journey?

Base: All using another mode before beginning to use rail on this route (142), Weekday (77), Weekend (65)

Reasons for starting to travel by train are varied

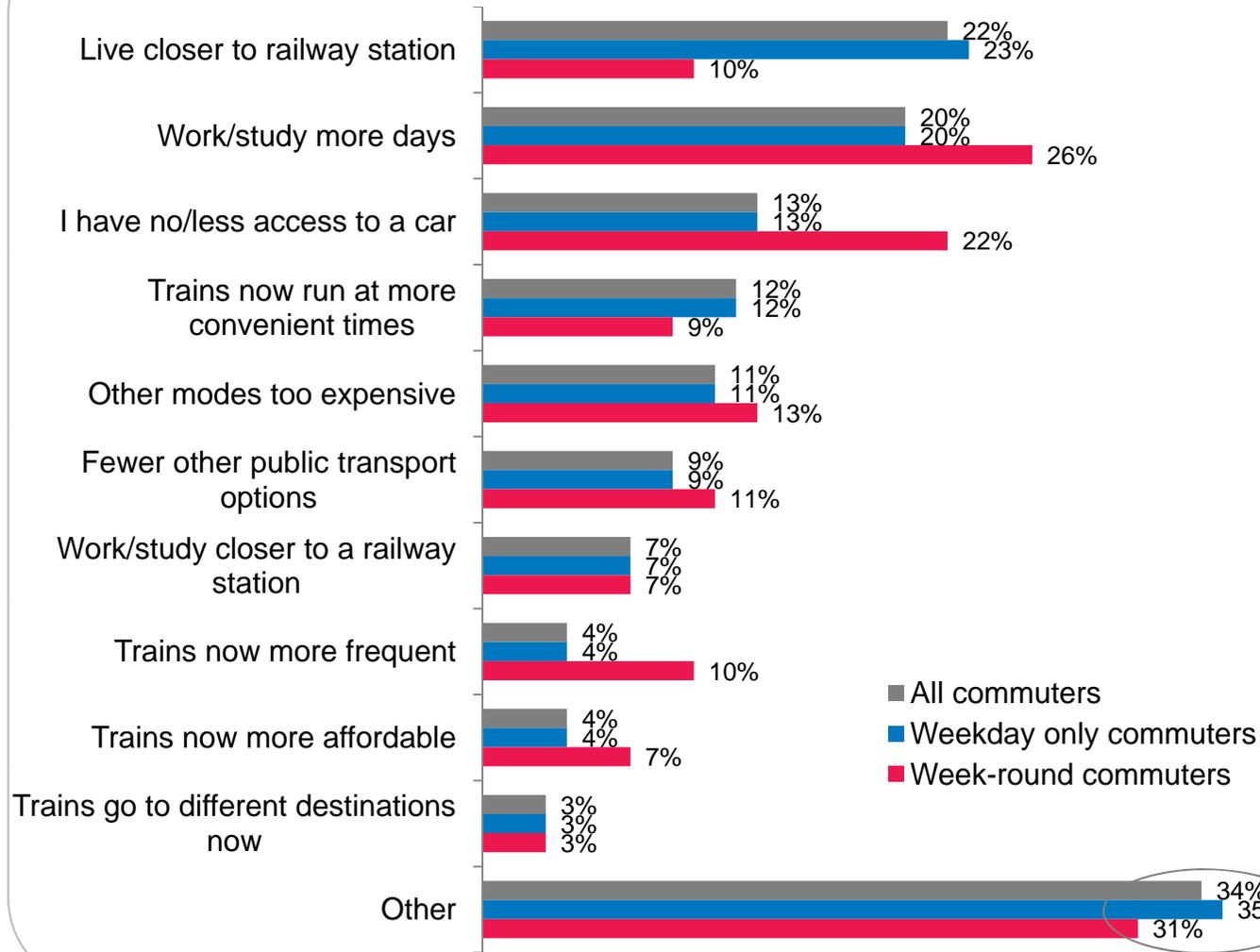
Reasons for deciding to start to commute by rail rather than another mode



Q28 Why did you decide to start making the journey by train instead of by another mode of transport?
 Base: All using another mode before beginning to use rail on this route (142), Weekday only (77), Week-round (65)

Reasons for now commuting by train more

Reasons for commuting by rail more now than when first started using this route

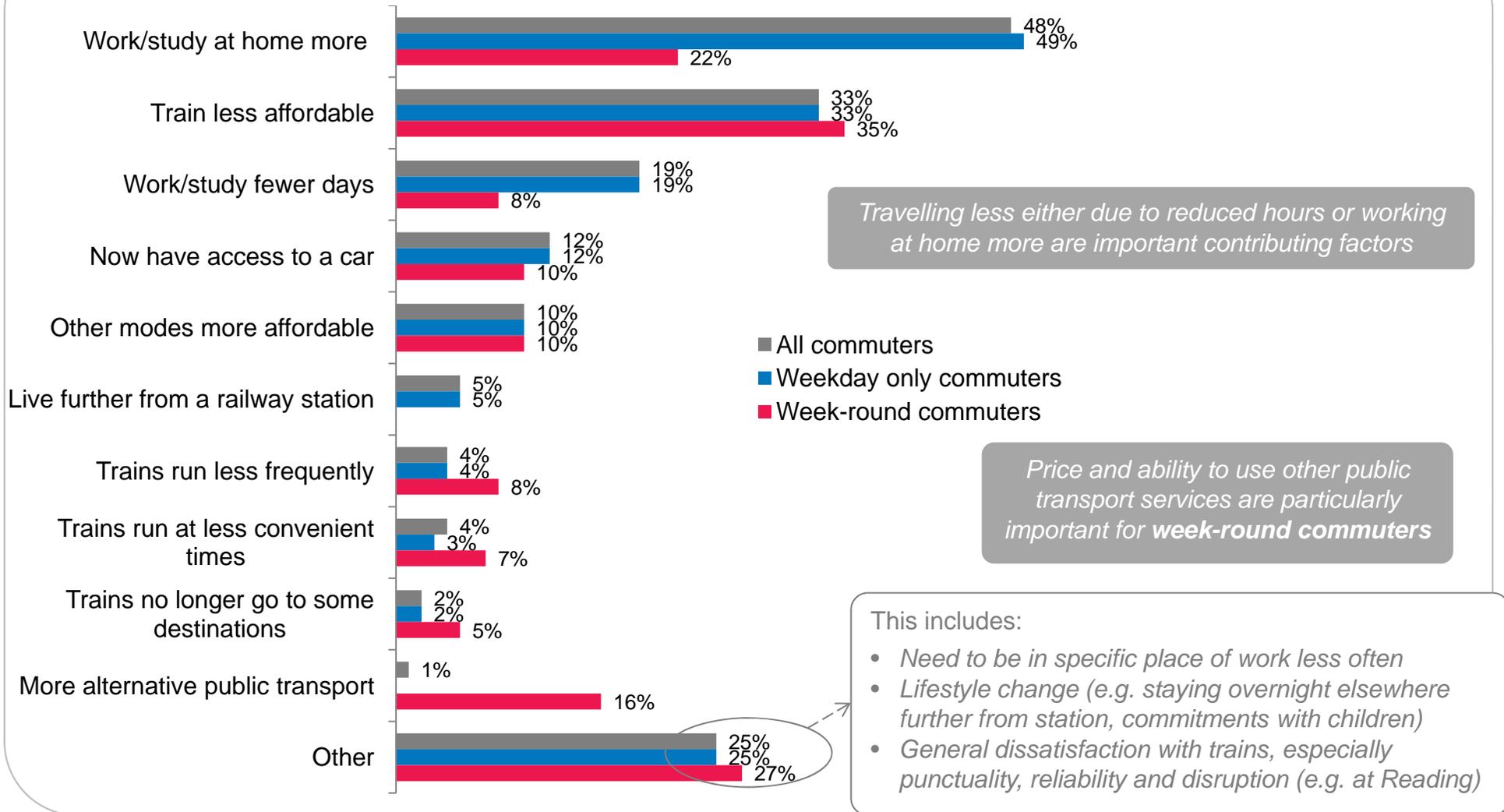


This includes:

- Moving home or job
- Required to commute more often (including to 'away' head offices)
- Journey time now quicker
- Cost/stress of car
- Season tickets/Oyster making increased travel more affordable/easier

Reasons for now commuting by train less

Reasons for commuting by rail less now than when first started using this route



Q29b Why do you now use the train less than you did before for this journey?
 Base: All commuting by train less now: all (55), weekday only (31), week-round (24)
 **CAUTION: Low base size

Reasons for switching to rail or increasing rail travel, for commuting

Weekdays only

Week-round

Reasons for **switching to rail** for commuting

Better price vs. other modes

Better timetabling

Proximity to station

No access to car

No access to car

Proximity to station

Better timetabling

Better price vs. other modes

Reasons for **greater use of rail** for commuting

Proximity to station

More frequent need to travel

No access to car

Better timetabling

Better price vs. other modes

More frequent need to travel

No access to car

Better price vs. other modes

Few alternatives

Proximity to station

Reasons for **lesser use of rail** for commuting

Less frequent need to travel

High price of rail

Other modes more affordable/available

High price of rail

Less frequent need to travel

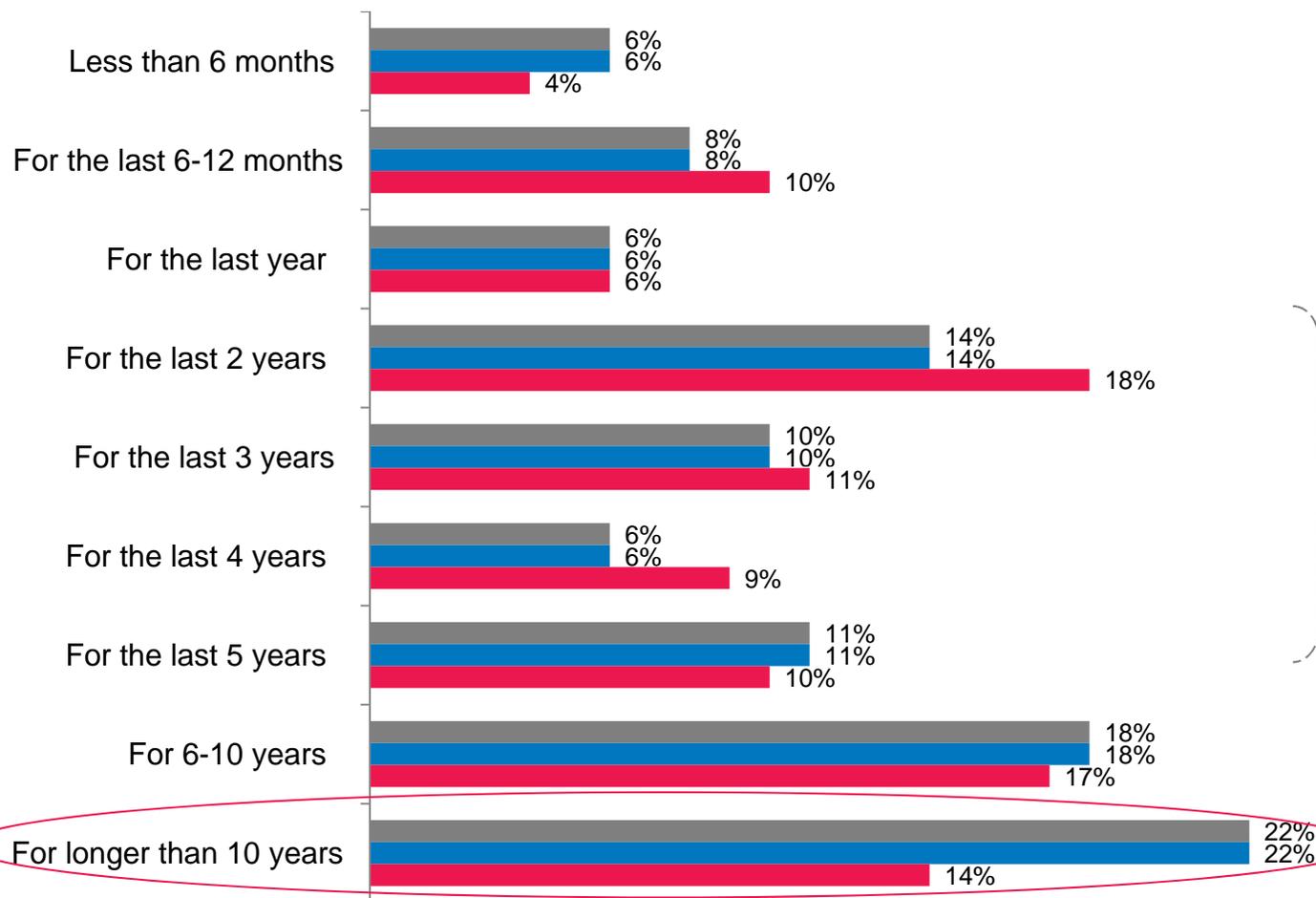
Other modes more affordable/available

- Suggests that weekday commuters are finding weekday service provision to have improved over time
- ...but that **weekend provision hasn't yet caught up** – key reason for switch or increased used is by default

Price of rail tickets looks to be a barrier to even more weekend commuting by rail

Weekday only commuters are longer term users of rail on their route

Length of time used train to commute on current route



More **week-round commuters** are medium term commuters. 48 per cent have commuted by rail on their route for the last 2-5 years

More than half of **weekday only commuters** have commuted by rail on their route for 5 years or more, and almost a quarter for longer than 10 years

■ All commuters (Mean: 5.1 years) ■ Weekday only commuters (Mean: 5.2 years) ■ Week-round commuters (Mean: 4.5 years)

Q24 Approximately how long have you been commuting by train between xxx and xxx?
Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

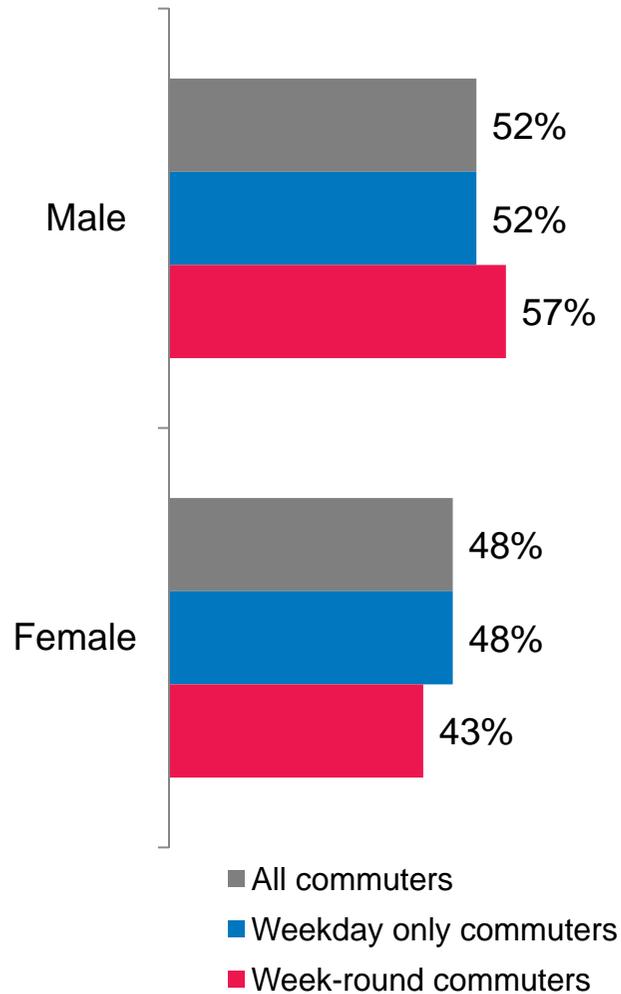
Who are commuters?

Demographics

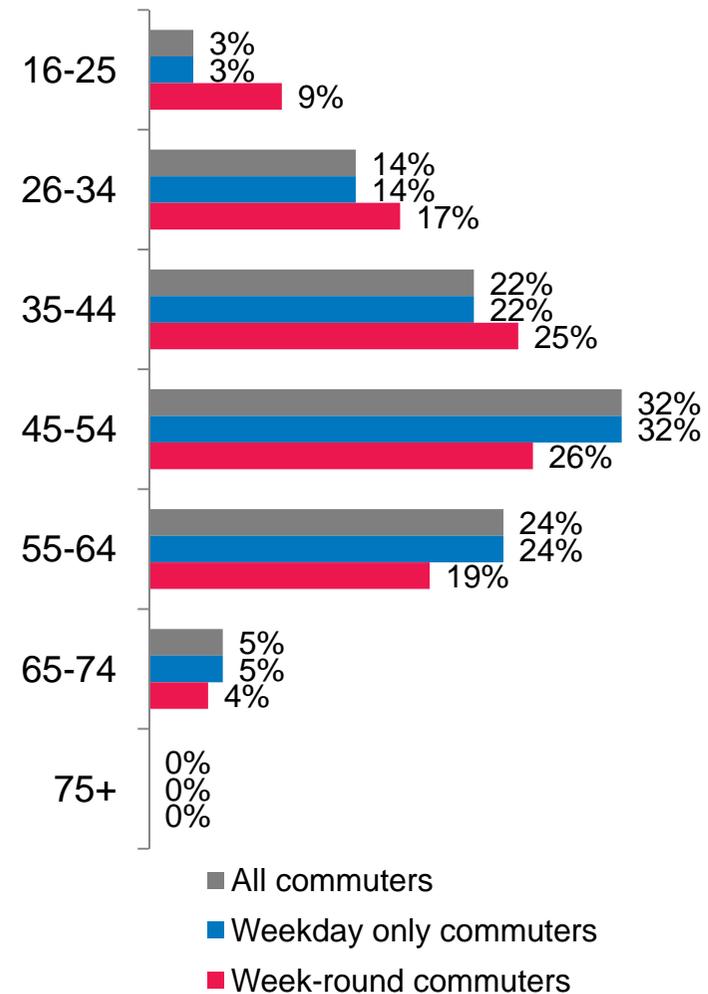


Week-round commuters slightly more likely to be female, and a little younger

Gender of commuters



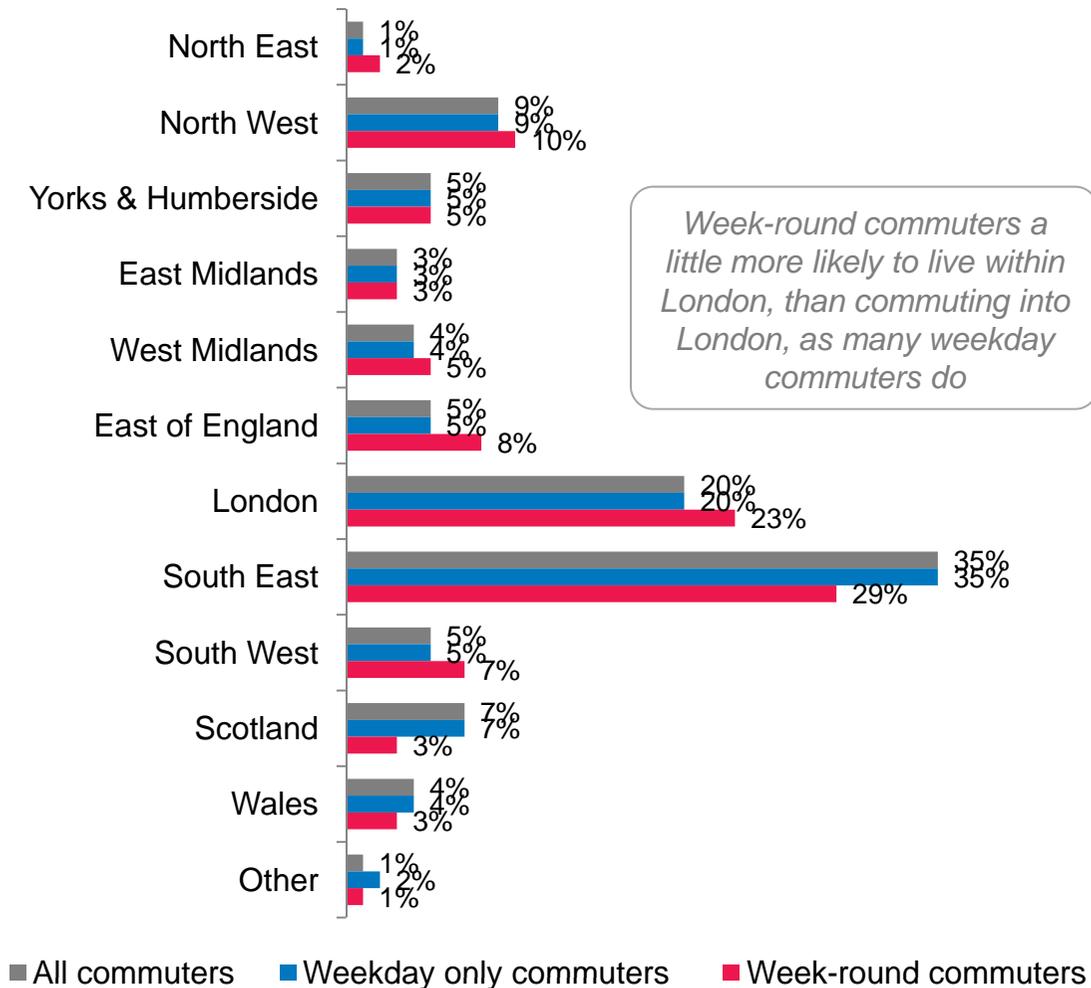
Age of commuters



QY. Are you...? / QX. Which age group do you fall into?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

Little regional of ethnic difference in commuter types

Regions where commuters live



Ethnicity of commuters

- NPS shows that the majority of rail journeys (87%) are made by people of white British or other white background
- Those making commuter journeys are similar, but other ethnic backgrounds are a little more common: 85 per cent are from white backgrounds and 12 per cent are of other ethnicities (3 per cent did not answer this question)
- Those commuting at weekends are more likely again to be of other ethnicities: 20 per cent weekend commuter journeys are made by people from non-white backgrounds. This suggests that week-round commuters will include a slightly higher proportion of minority ethnicities, than weekday commuters

QZ. In which region of the UK do you live?

Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

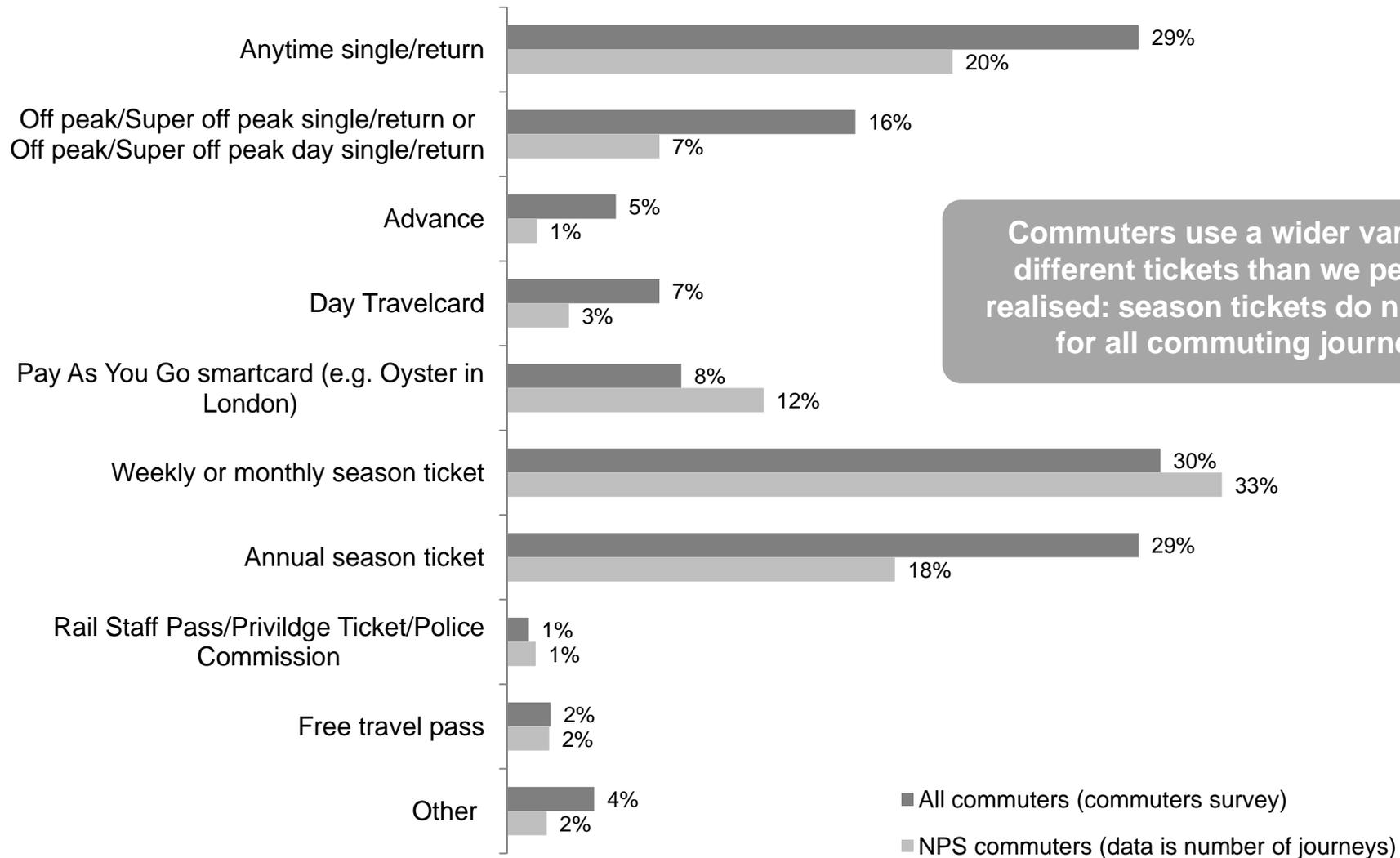
How well commuters are provided for:

Tickets currently used



Commuters use more than one ticket type for different commuting journeys

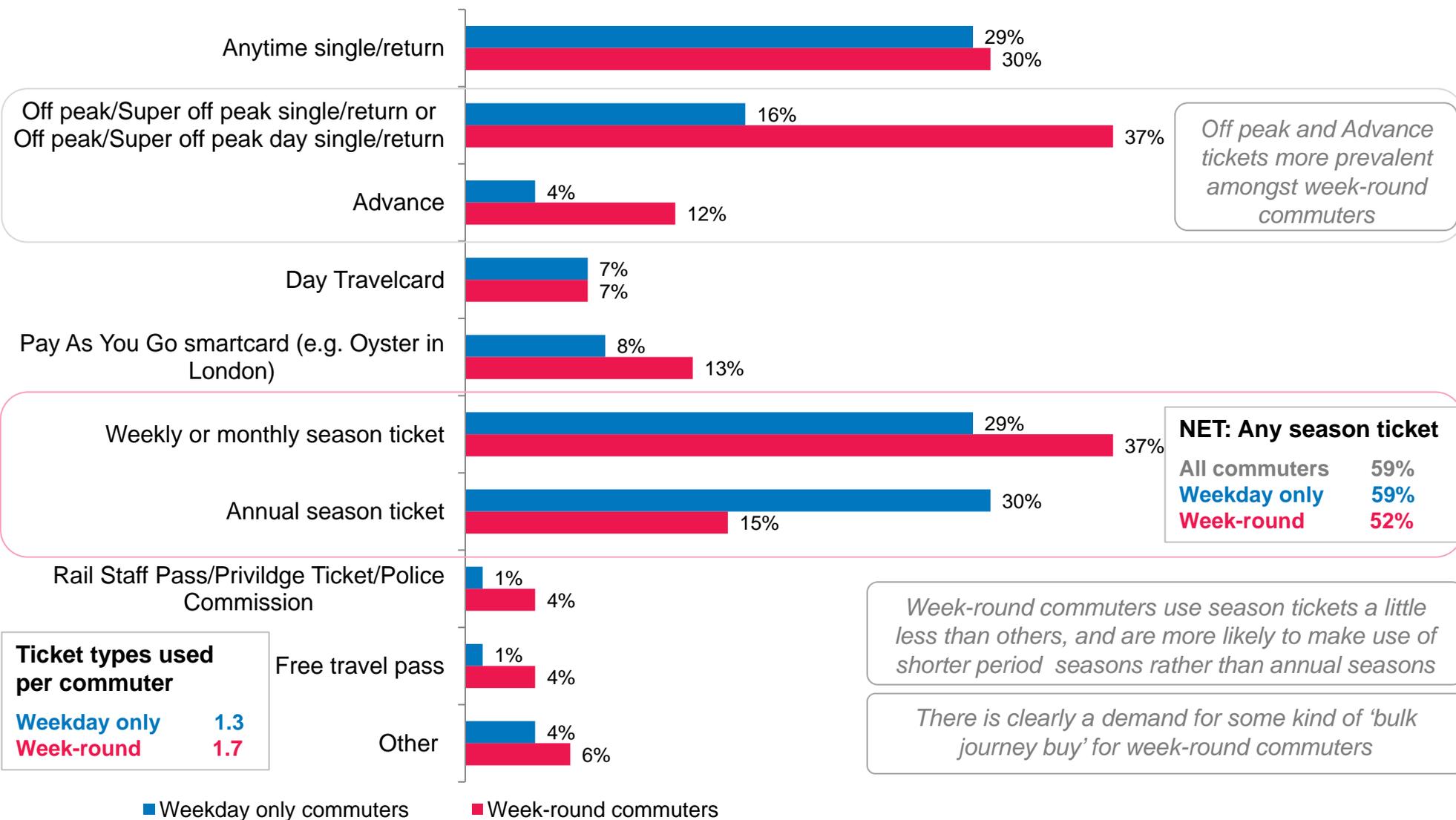
Tickets used by rail commuters for their commuting journey



Q21a What ticket type do you use when you commute to work/education?
 Base: All commuters – commuter survey(583), NPS commuters – Spring-Autumn 2012 (24,135)

Tickets used vary by days commuted

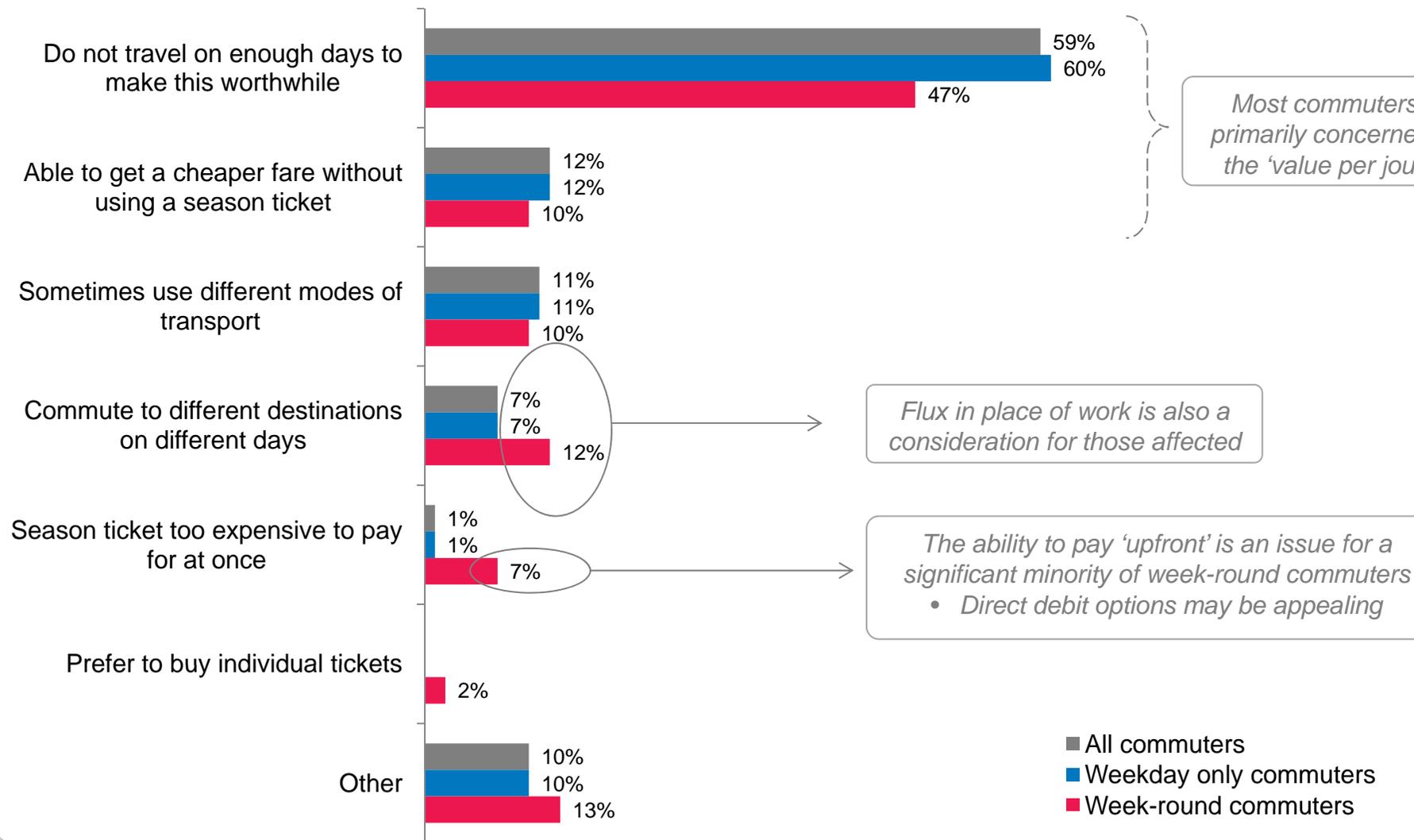
Tickets used by rail commuters for their commuting journey



Q21a What ticket type do you use when you commute to work/education?
 Base: All commuters (583), Weekday only commuters (327), Week-round commuters (256)

A number of factors deter commuters from using season tickets currently

Reasons for choosing not to use a season ticket

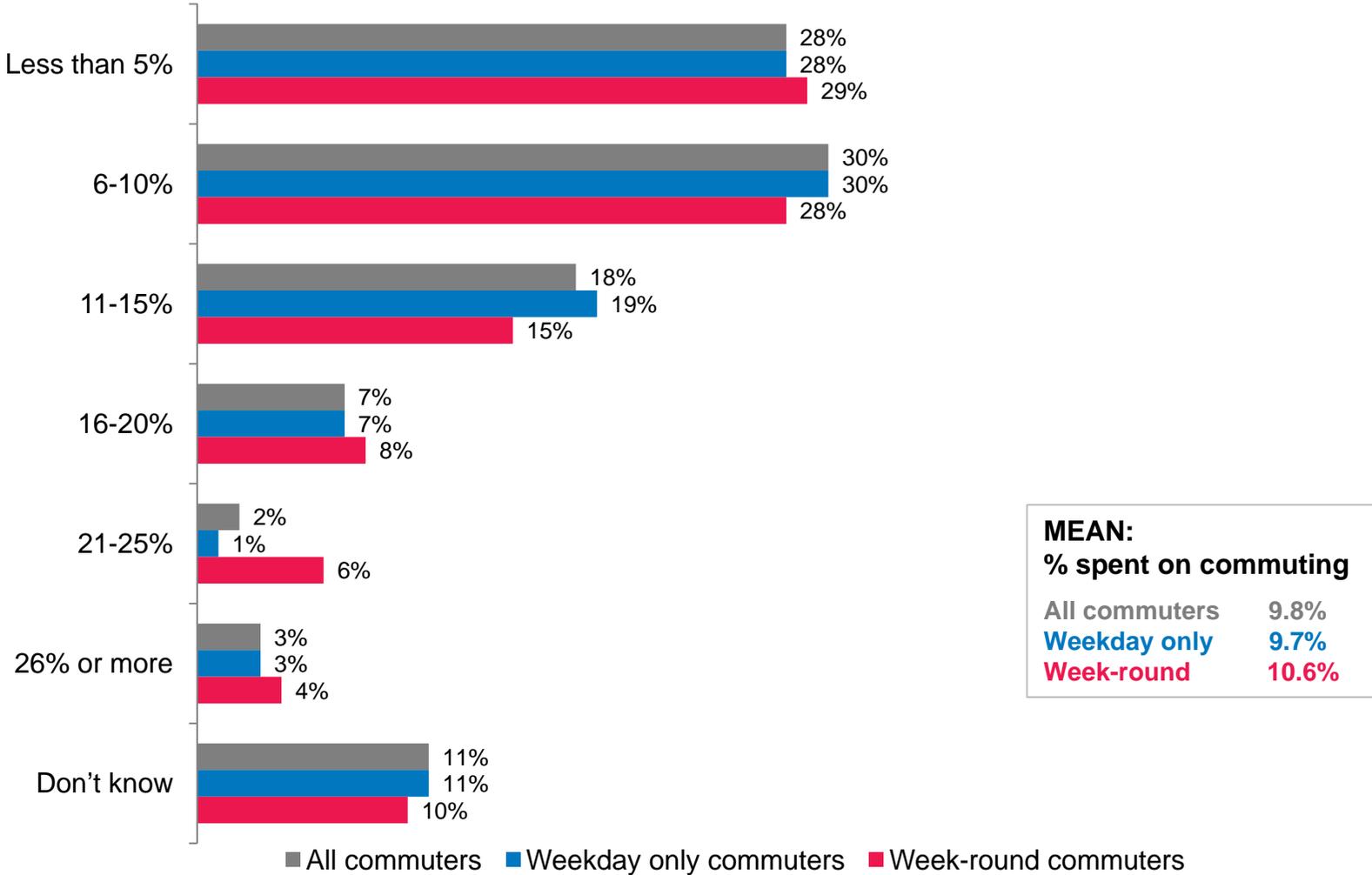


Q21b Why do you choose not to use a season ticket for your commute?

Base: All not using a season ticket for commuting journeys (252), Weekday only commuters (128), Week-round commuters (124)

Spend on commuting is slightly higher amongst week-round commuters

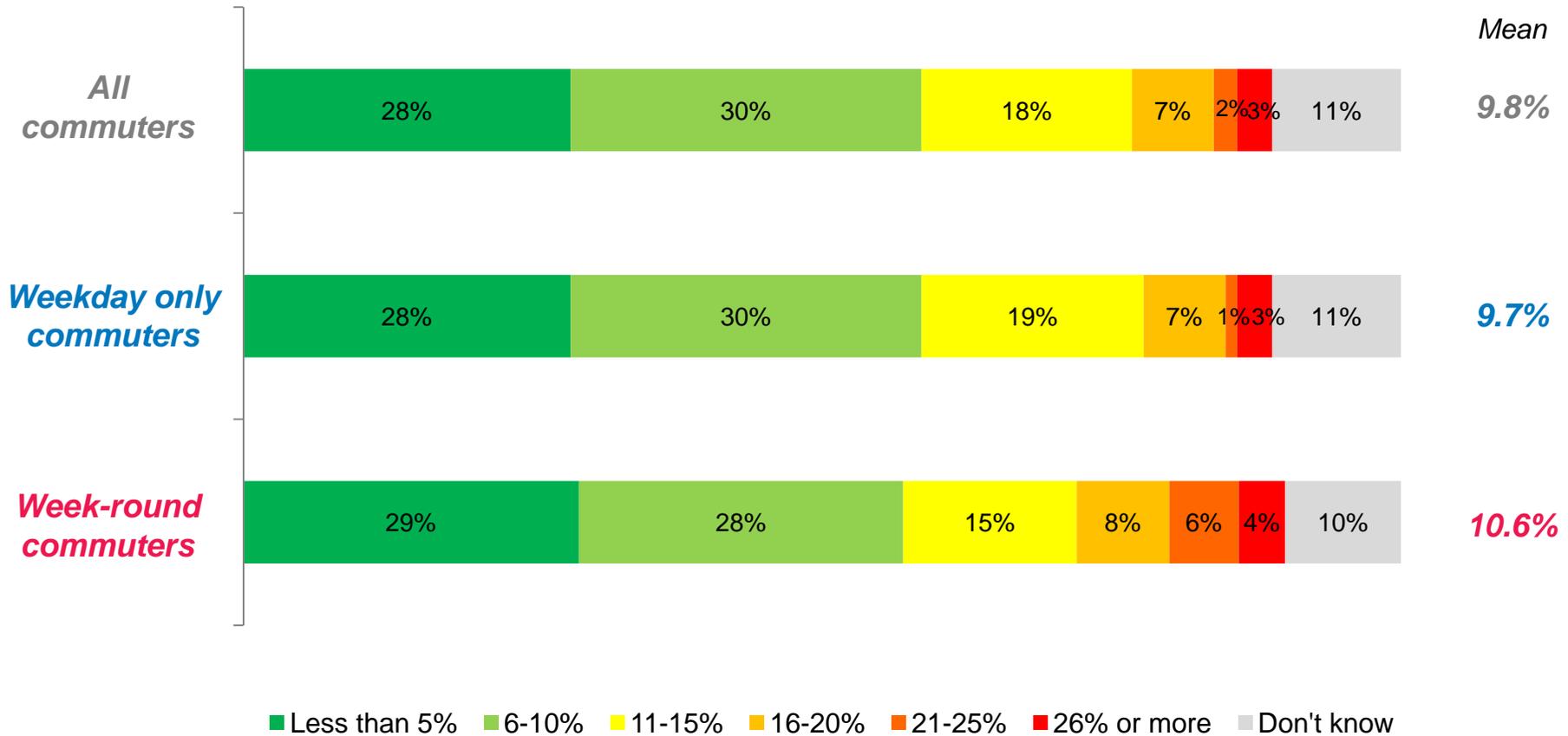
Percentage of income after tax and deductions spent on commuting (all modes of transport)



Base: All
 All commuters(583), Weekday only commuters (327), Week-round commuters (256)

Week-round commuters spend more on commuting

Percentage of income after tax and deductions spent on commuting (all modes of transport)



Q22 What would you estimate the percentage of your income (after tax and deductions) that you spend on commuting to be?
 All commuting for work (546), Weekday only commuters (312), Week-round commuters (234)

How well commuters are provided for:

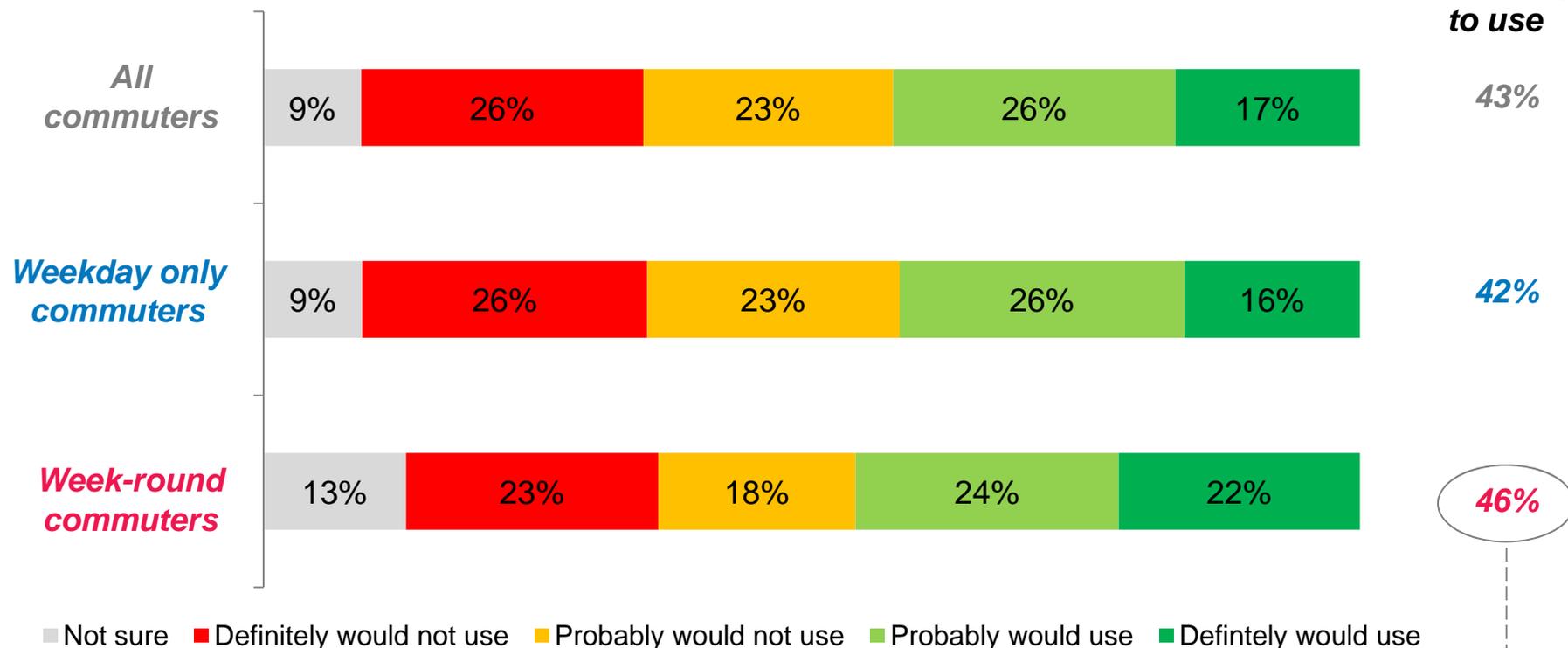
Potential ticketing products



There is substantial appetite for a carnet ticket product

*“A **carnet ticket** which allows you to buy several single tickets (for example ten) in bulk at a preferential rate, which would be cheaper than a standard single ticket. You can then use these to travel on different days as and when you need them”*

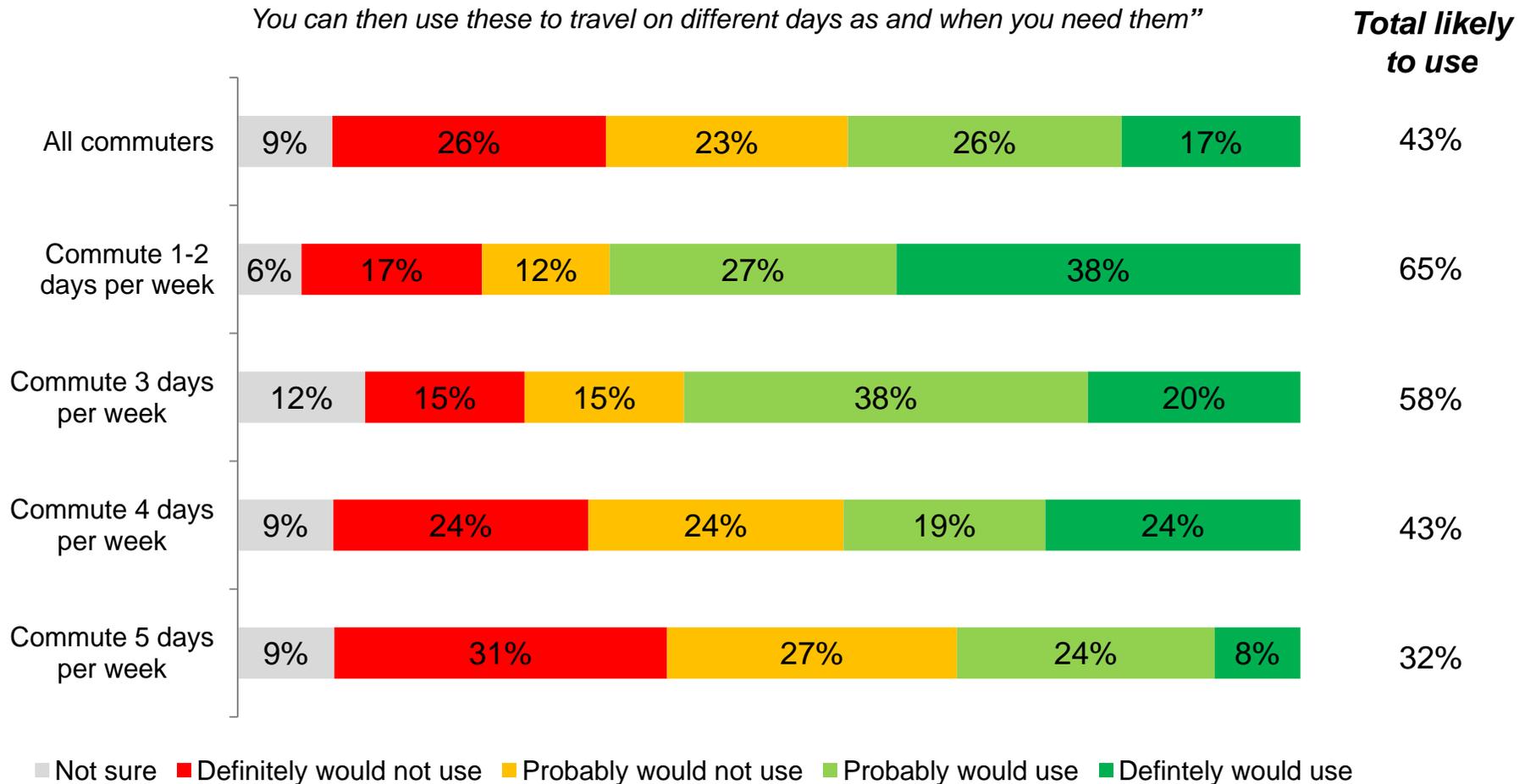
Total likely to use



A carnet ticket would be particularly appealing to week-round commuters

Naturally, those commuting only a few days each week are particularly interested in carnets

*“A **carnet ticket** which allows you to buy several single tickets (for example ten) in bulk at a preferential rate, which would be cheaper than a standard single ticket. You can then use these to travel on different days as and when you need them”*



Q23a How likely would you be to use either of the following when travelling to your place of work/education by train...?
 Base: All commuters (583), Commute 1-2 days (81), 3 days (69), 4 days (85) 5 days (290)

Carnets have wide appeal to a range of current ticket holders

The primary motivations for likely uptake were flexibility and reduced cost

Flexible usage and the period of validity allows for changes of routine

Flexibility and potential to save money

If it saves me money I am interested

Freedom of choice to use when I need

I like the idea of saving money and having the tickets available to use when I want

Sounds flexible - would probably work with my commuting pattern which tends to be irregular

Erratic work engagements, unpredictable schedule, at present no card caters for my needs

I do not travel enough to use a season ticket, but a carnet would be cost-effective and allow me to chose to use the train more often than my car

My works varies enormously as I am a freelance worker. A carnet/book of tickets would give maximum flexibility

Time saved through not having to buy individual tickets is also an advantage

Because it should be cheap-ish and give me more flexibility than advance tickets and save me time booking tickets which takes up TOO much of my time, trying to find the cheapest deal

Takes less time than buying a ticket for every journey

It would be a time saver

Cheaper and avoids the hassle of buying tickets at the station every day

A few already use Carnet products and feel these are of benefit

More flexible, cheaper, used [it] in Paris so know how easy it is

I use one already

My travel is not regular, but I travel often and would like to reduce costs. I have found the carnet helpful with the Heathrow Express

Some days I don't travel so season ticket doesn't make sense - but carnet is easier and cheaper than buying daily tickets - I am already a user of Chiltern Carnet

Carnets have wide appeal to a range of current ticket holders

For many, it would avoid the issue of 'wasted journeys' which can be a drawback of, or barrier to, season tickets

I sometimes work from home and yet I currently buy an annual season ticket because it's cheaper and quicker than buying daily tickets

Because buying the normal season means buying journeys that I sometimes do not use

Some days I do not travel to work for various reasons and this becomes a wasted day on my weekly pass. With a carnet, I would not have wasted days

There are occasions when it is not cost effective to buy a monthly or weekly ticket because of annual leave or bank holidays. On those occasions, I buy a daily return but a carnet might be cheaper

Gives me flexibility on which journeys I choose, and it means that I am not wasting money on the days I do not use the train to commute

I regularly travel the same route but at different times, so buying a peak season is not beneficial, neither would the off-peak be, as I sometimes travel at peak times. A carnet seems like a happy medium between the two

As I reach retirement and might just commute 1 or 2 days per week a Carnet ticket would be useful. From Worthing it only pays to buy a weekly ticket when commuting 3 days or more. It is very expensive to buy a daily ticket to London

The move to flexible ticketing is also welcomed as accommodating flexible working patterns, which some feel the current system penalises

I think it would be more fair for part-time workers who use the train regularly to get some discount for regular use. The current structure of season tickets or full-price day tickets seems to assume that everyone is either a full-time worker or a tourist, but in fact part-time work is increasing and should be encouraged and supported

Because I work shifts and the week's work are broken meaning I have to buy a 7 day ticket plus 1 off peak ticket to cover my working week

I would like to get a discount for the amount of travel I do but I don't travel every day and not to the same destinations. I would like to see something like the Oyster card introduced nationally, as getting the best value is a nightmare

The appeal of carnets would be dependent on the terms once implemented

Passengers made several (and varying) assumptions about carnet ticket terms of use The finalised terms of any carnet product would be crucial to uptake in practice

- The period of validity – many assumed this would range from one month to 6 months, with longest terms preferred
- The ability to use at peak and off peak times – some assumed you would choose peak or off-peak on purchasing the carnet, whilst others anticipated it would be used on an anytime basis which was most appealing
- The ability to use as singles rather than committing to returns on each day of use would benefit some – i.e. could make outward journey by train, and homeward by another mode (e.g. bicycle, taxi)
- No compulsory seat reservation, ensuring flexibility to take any train on a given route (unlike Advance tickets)
- Passengers expect this to be cheaper than all other available options (including Travelcards, price caps on Oyster)
- Some would prefer this if it was issued as a smartcard ticket

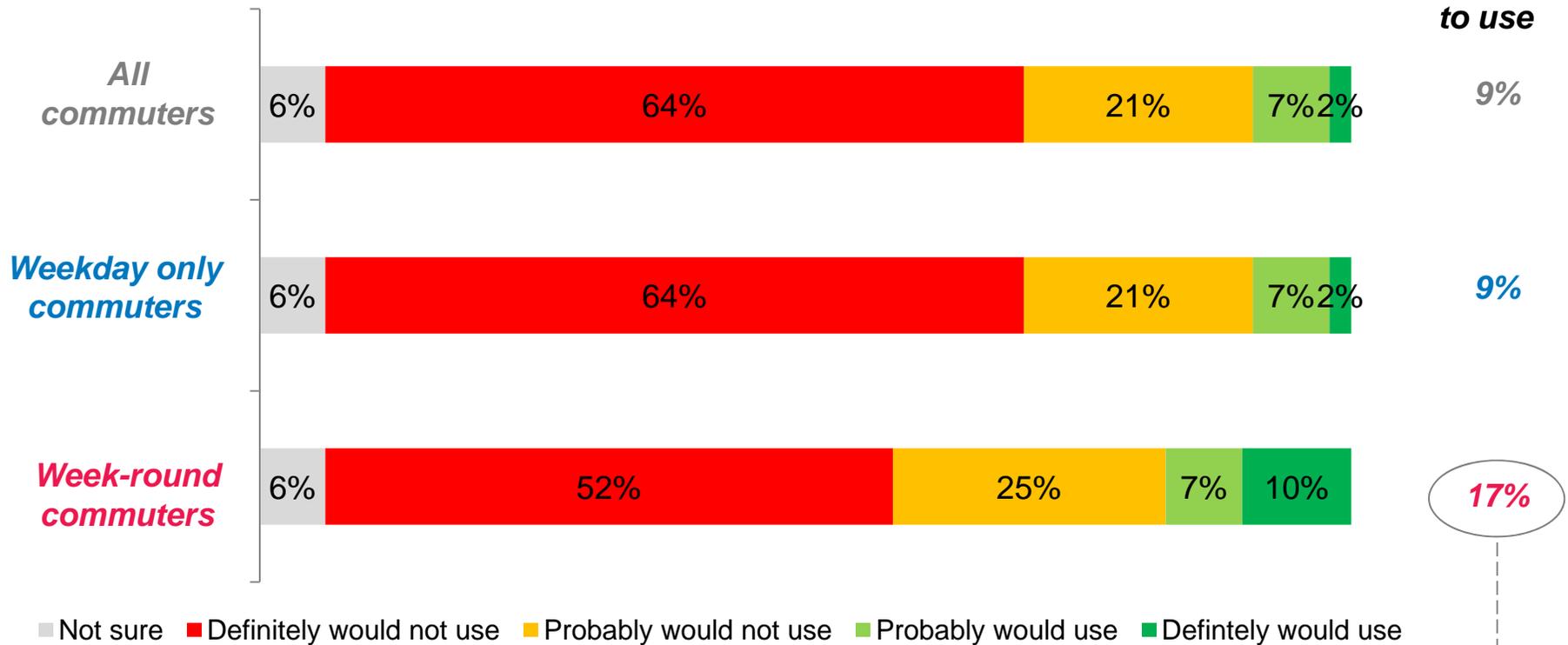
It would allow one way journey- instead of a return I could cycle home

Convenience - less transactions. Would prefer an Oyster type card

Off peak seasons are less appealing than carnets across all commuter groups

*“An **off-peak season ticket** which allows you to travel on any trains on your route which do not fall within ‘peak’ times. This would be less expensive than a normal season ticket (which allows you to travel at any time of the day including peak times)”*

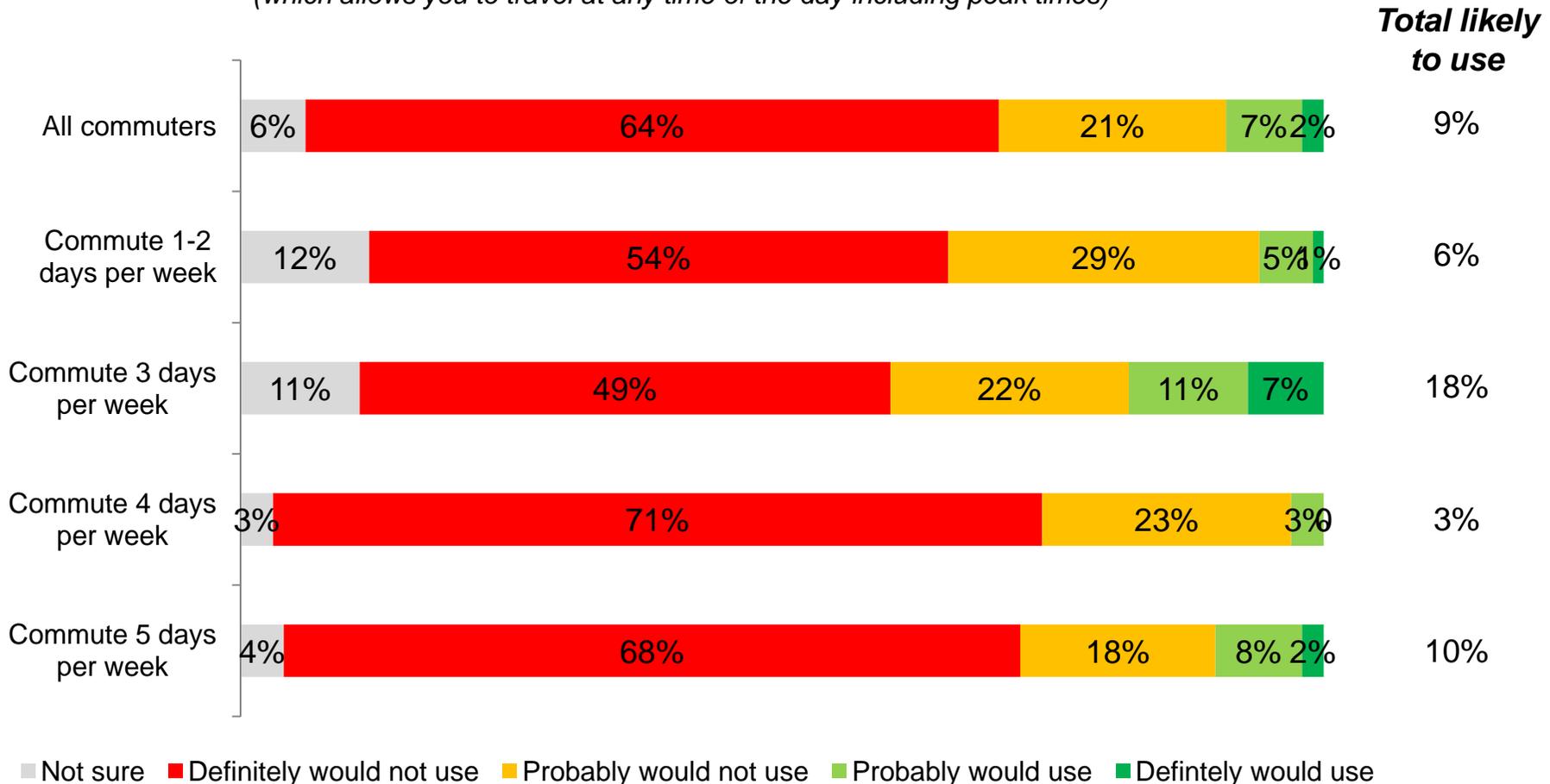
Total likely to use



...although this is appealing to a number of week-round commuters

Off peak seasons are less appealing than carnets regardless of commuting frequency

*“An **off-peak season ticket** which allows you to travel on any trains on your route which do not fall within ‘peak’ times. This would be less expensive than a normal season ticket (which allows you to travel at any time of the day including peak times)”*



Q23a How likely would you be to use either of the following when travelling to your place of work/education by train...?
 Base: All commuters (583), Commute 1-2 days (81), 3 days (69), 4 days (85) 5 days (290)

Off-peak season tickets are attractive to those who have flexibility in their working pattern

The main benefit would be the financial savings that would be expected

If the cost is cheaper I would choose the cheaper option as I am a student

I am keen to save costs where I can

It would be a lot cheaper

Anything that can save me money is welcome

As long as it was a measurable discount

It would save me around £12 per week

For some, this is attractive as it supports current patterns of travel

I travel almost every day at off peak times

My working hours allow for delivering children to school first so I would be travelling in off-peak hours

Because I work shifts and some weeks I start at 14:30 and finish at 21:30. On nights I travel in at 18:45 and come home the following day at 08:00

Most of my travelling is at weekends or weekday out of the morning peak so it would be useful

One week in 6 I work seven nights on the trot so don't travel during peak times

I don't like paying full price for a season ticket when I do not have to travel at peak times

Even more express a willingness to adjust their working pattern if financially advantageous

I sometimes travel off peak or could do so more if there was more incentive

I could then amend my work schedule to travel off peak and save money

I would alter my work times to fit in with this

If I could rearrange my work start and finish times, an off peak season ticket would be cheaper

It would be cheaper, and my working hours are flexible, so I would be extremely keen to take advantage of this

I would change my start and finish times to suit the fare

Because I can often choose my hours and could travel later

Because the flexibility of my job would allow me to

How well commuters are provided for:

Summary of experience (NPS)



Current commuter experience of rail journeys

Overall satisfaction with journey

NPS (i.e. data shows proportion of journeys)



- Experience is generally better for those who commute on weekends than weekdays – and improved for both in last five years
- However, are we confident that rail is accessible in the first place for weekend commuters?

**Summary: meeting
the needs of the
'average' commuter**



The rail commuter

The common stereotype

Regular travel pattern:

- Office-based
- Monday-Friday
- Nine to five
- Work full time

City worker (a “suit”)

Travelling into London for work

Short journeys to work

Season ticket holder

Male?

The reality

Regular travel, but not a clear pattern

- Typically office-based, but a quarter work at a variety of sites
- Small (but growing?) market for weekend commuting
- Flexible working including blurring across weekend/weekdays

Varied types of jobs (high proportion of government/public sector workers)

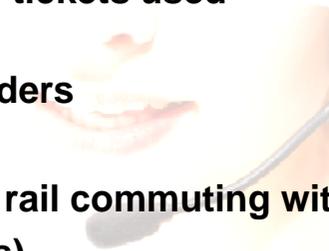
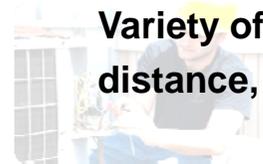
Nationwide, including inter-urban journeys

Variety of journey lengths including some very long distance, less frequent journeys

Variety of tickets used

Both genders

Combine rail commuting with other modes (especially at weekends)



The typical weekday commuter

- Office-based, managerial/professional
 - Full time worker
 - Public sector & “business services”
 - Age 26-60
-
- Travel to work on most weekdays, at peak times – reasonably, but not totally, predictable
 - Anytime or season tickets (annual, monthly, weekly)
 - Stick to train as commuting mode



There are a lot of commonalities among weekday commuters – yes, there is such thing as a “**modal average**” weekday commuter

Therefore indicating the industry has some understanding of ‘commuter’ needs, and should continue striving to meet them

Inevitably, there does exist a substantial number who do not fit the profile

More flexible tickets appeal, especially carnets

- The industry generally matches service provision to these typical behaviours
- But common for journey experience to be less than satisfactory



Need continued improvements to punctuality and on-board cleanliness in particular

The (less) typical week-round commuter

- Often office-based, managerial/professional
- Or skilled manual workers
- Full time workers
- (Plus students, attending education site for short periods)

- Public and service sector, including retail and hospitality sectors
- Extremely likely to work both weekdays and weekends
- Regular but unpredictable times/days of travel

- Age 26-60 (but a little younger than weekday)

- Variety of tickets used, particularly Anytime, off-peak, weekly season

- Tendency to also commute by other modes (a fifth by car)



No such thing as a typical week-round commuter!

Wide variety of travel needs including (broadly):

- Earlier and later trains at weekends
- Tickets to reward (rather than penalise) regular but non-standard travel – carnets in particular appeal
- Given need for flexibility, might multi-modal tickets also appeal?

- Not provided for as well as weekday commuters
- But generally satisfied with many aspects of journey experience when making journeys



- Deserve greater recognition within rail industry, as regular passengers and valued customers
- Improvements such as the above likely to be very beneficial

Appendix

QUESTIONNAIRE

Questionnaire (1/7)

J20431 – Questionnaire

Thank you for agreeing to help with our survey about train travel

SCREENING – ASK ALL

Q1a. Do you ever commute by train?

Please think of any commuting journeys you make by National Rail trains (including London Overground). Please do not include London Underground, DLR, or other underground or light railway services.

Yes - commute to work by train GO TO Q2

Yes - commute to a place of education (e.g. school/college/university) by train
GO TO Q2

IF 'YES' FOR BOTH EDUCATION & WORK GO TO Q1b

No, and I never have GO TO Q4

No, but I used to GO TO Q1c

IF COMMUTE TO BOTH WORK & EDUCATION AT Q1a

Q1b. Which of the following do you do most often?

Commute to work by train GO TO Q2

Commute to a place of education by train GO TO Q2

IF COMMUTE FOR BOTH WORK AND EDUCATION, USE MOST COMMON PURPOSE FOR Q WORDING IN THE COMMUTING SECTION

IF 'NO, BUT USED TO' AT Q1a

Q1c. How long ago did you stop commuting by train?

In 2013 GO TO Q4

In 2012 GO TO Q4

In 2011 GO TO Q4

Before 2011 GO TO Q4

IF COMMUTE (EITHER/BOTH OF WORK/EDUCATION) AT Q1a

Q2. Do you ever commute by train on Saturdays or Sundays?

Yes, I commute on Saturday and/or Sunday GO TO Q3

No, I only ever commute on weekdays (Mon-Fri only) GO TO Q4

IF YES AT Q2

Q3. When was the last time that you made a commuting journey by train on a Saturday or Sunday?

In the last seven days GO TO Q4

In the last two weeks GO TO Q4

In the last month GO TO Q4

Longer than one month ago GO TO Q4

Q4-5 RELATE TO EXPERIENCE OF DELAYS AND COMPENSATION DESIGNED TO RECRUIT PARTICIPANTS FOR A SEPARATE SURVEY

SCREENING RULES:

IF NEITHER COMMUTER, NOR DELAYED – ROUTE TO CLOSING

IF WEEKEND COMMUTER – ROUTE TO 'COMMUTING' SECTION

IF CLAIMED COMPENSATION – ROUTE TO 'COMPENSATION' SECTION

IF WEEKDAY COMMUTER, NO DELAY – ROUTE TO 'COMMUTING' SECTION

IF NOT COMMUTER, BUT DELAY – ROUTE TO 'COMPENSATION' SECTION

IF WEEKDAY COMMUTER AND DELAYED – RANDOMLY ASSIGN TO 'COMMUTING' OR 'COMPENSATION' SECTION

DEFINITIONS:

WEEKEND COMMUTER IF YES AT Q2

WEEKDAY COMMUTER IF YES TO WORK AND/OR EDUCATION AT Q1a, AND NO AT Q2

COMMUTING SECTION

We would now like to ask you a bit more about the commuting journeys that you make.

IF COMMUTE FOR BOTH WORK AND EDUCATION AT Q1a, USE MOST COMMON PURPOSE FROM Q1b IN Q WORDING THROUGHOUT COMMUTING SECTION

Your daily routine

Q1. How many hours do you work/attend education [as applicable] each week?

36 hours or more

More than 30 hours but less than 36

More than 25 hours but less than 30

More than 20 hours but less than 25

More than 15 hours but less than 20

More than 10 hours but less than 15

10 hours or less

ASK Q2a IF COMMUTE TO WORK ONLY AT SCREENING Q1a OR MOST OFTEN AT Q1b

Q2a. Which of the following best describes your occupation?

Professional/Senior Managerial

Middle Managerial

Junior Managerial/Clerical/Supervisory

Skilled Manual (With professional qualifications/served an apprenticeship)

Unskilled Manual (No qualifications/not served an apprenticeship)

Student

Other (Please specify)

ASK Q2b IF COMMUTE TO WORK

Q2b. And what is your job title?

Please tell us your job title c

TYPE IN

Questionnaire (2/7)

ASK Q2c IF COMMUTE TO WORK ONLY AT SCREENING Q1a OR MOST OFTEN AT Q1b

Q2c. What kind of organisation do you work for?

- Government
- Local government
- Other public sector
- Transport and logistics
- IT/telecom
- Advertising/Marketing/PR
- Media/Journalism
- Banking/Financial/Insurance
- Retail
- Hospitality
- Other service sector
- Agriculture
- Wholesale
- Manufacturing
- Construction
- Other (Please specify)

ASK ALL

Q3a. Do you usually work/study [as appropriate] at the same site each day?

- Yes, I usually work/study [as appropriate] at the same site each day
- No, the site that I work at/study [as appropriate] can differ from day to day
- No, some days I work/study [as appropriate] from home

ASK Q3bi/ii IF COMMUTE TO WORK ONLY AT SCREENING Q1a OR MOST OFTEN AT Q1b

IF SOMETIMES WORK FROM HOME AT Q3a

Q3bi. Other than any occasions when you work at home, which of the following do you work at?

OR ALL OTHER CODES AT Q3a

Q3bii. Which of the following do you work at?

(Single code for 'yes' at Q3a, and multicode for 'no' at Q3a)

- My organisation's offices
- Another company's offices (e.g. a client's office for contract work)
- Factory
- Warehouse
- Shop/retail unit
- High street bank
- Restaurant/café/pub/bar
- Other high street outlet
- Hotel
- Tourist attraction
- Depot
- Construction site
- School or a place of education
- Hospital
- Prison
- Other (Please specify)

ASK ALL

Q4. Ignoring holidays or days when you are sick, which of the following statements best describes the days that you work/attend education [as appropriate]?

STATEMENTS TO APPEAR ON SCREEN IN THE 'BATCHES' SHOWN BELOW (ROTATE BATCHES) & RESPONDENT CAN PICK ONE STATEMENT FROM EACH 'BATCH' ONLY

BATCH 1

- I always work/attend education [as appropriate] on these exact same days each week
- I usually work/attend education [as appropriate] on these days each week, but it varies
- The days of the week that I work/attend education [as appropriate] can differ completely from week to week

BATCH 2

- I can choose the days of week that I work/attend education [as appropriate]
- The days of week that I work/attend education [as appropriate] are fixed and I cannot change them

Q5. How often would you say you work/attend education [as appropriate] on each day of the week (during term time [for those commuting for education])?

Please include all days of the week that you have ever had to travel to your place of work/education [as appropriate], even if this was not a regular occurrence.

- | | | | | |
|------------|-----------|--------------|--------|-------|
| Every week | Regularly | Occasionally | Rarely | Never |
| Monday | | | | |
| Tuesday | | | | |
| Wednesday | | | | |
| Thursday | | | | |
| Friday | | | | |
| Saturday | | | | |
| Sunday | | | | |

IF 'NEVER' FOR EACH DAY OF WEEK – GO TO CLOSE

Q6. Thinking of the last full week (i.e. the seven days from Monday to Sunday), on which days of the week did you commute to work/education [as applicable] (whether by train or any other mode of transport)?

Please tick all the days that you travelled to your place of work/education [as appropriate] last week using any mode of transport

Select all that apply

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

The modes of transport you use for your main commuting journey

When answering the next questions, please think about the main mode of transport you use when travelling to your place of work/education [as appropriate]

For example, if you walk for 10 minutes then get a train for 45 minutes then get a bus for 15 minutes, the train would be the main part of your journey.

Questionnaire (3/7)

Q7. Of the days that you commuted to work/education [as appropriate] last week, which days did you commute by train as your main mode?

Please think of any commuting journeys you made by National Rail services (including London Overground). Please do not include London Underground, DLR, or other underground or light railway services.

SHOW DAYS WORKED/ATTENDED EDUCATION LAST WEEK AT Q6

I commuted by train each day I worked last week

I did not commute by train on any day last week

IF COMMUTED BY TRAIN EVERY DAY WORKED/STUDIED LAST WEEK AT Q7

Q8. Do you ever commute by any mode of transport other than by train?

No – I always commute by train

Yes – I sometimes commute by train, but I sometimes use another mode of transport

ASK ALL

IF DID NOT TRAVEL BY TRAIN EVERY DAY LAST WEEK AT Q7 OR YES AT Q8 (i.e. SOMETIMES TRAVEL BY MODE OTHER THAN TRAIN)

Q9. Which days of the week do you typically choose to commute by another mode of transport instead of by train as the main mode?

Please select the days of the week that you use another main mode of transport to get to work/education [as appropriate], even if you don't do this every single week

Select all that apply

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

It can vary and does not depend on the day of the week

IF DID NOT TRAVEL BY TRAIN EVERY DAY LAST WEEK AT Q7 OR YES AT Q8 (i.e. SOMETIMES TRAVEL BY MODE OTHER THAN TRAIN)

Q10. What other mode(s) of transport do you use as the main mode to commute to work/education [as appropriate]?

Walk

Car – driving myself

Car – given a lift by a friend/relative/colleague

Car – car sharing arrangement

Bicycle

Bus

Underground train

Light railway/DLR

Tram

Motorbike/moped

Van

Taxi

Coach

Ferry/Riverboat

Other (Please specify)

IF DID NOT TRAVEL BY TRAIN EVERY DAY LAST WEEK AT Q7 OR YES AT Q8 (i.e. SOMETIMES TRAVEL BY MODE OTHER THAN TRAIN)

Q11. And how often do you commute to work/education [as appropriate] by this/these alternative mode(s) of transport?

3 times or more per week

Once or twice a week

1-2 times a month

Once every 2-3 months

Less often

ASK ALL

We are interested in the reasons that people choose certain modes of transport when commuting.

Q12. Why do you commute to work/education [as appropriate] by train rather than another mode of transport?

Please select all that apply

MULTI-CODE

RANDOMISE

Railway station is close to my home

Railway station is close to my place of work/education [as appropriate]

Trains run at times which are convenient for me to make these journeys

It is quickest to travel by train for these journeys

It is more cost effective to travel by train for these journeys

It is environmentally friendly to travel by train

I have no alternatives (i.e. no other public transport and no car)

It is the least stressful way to make these journeys

I don't like driving to my place of work/education [as appropriate]

It is difficult to park near my place of work/education [as appropriate]

It is expensive to park near my place of work/education [as appropriate]

I can do some work on the train

I like to be able to read books/newspapers on the train

I like to be able to listen to music on the train

I like to be able to relax/sleep on the train

Other (Please specify)

IF DID NOT TRAVEL BY TRAIN EVERY DAY LAST WEEK AT Q7 OR YES AT Q8 (i.e. SOMETIMES TRAVEL BY MODE OTHER THAN TRAIN)

Q13. Why do you decide **not** to commute by train on some days?

MULTICODE

RANDOMISE ORDER WITH OTHER AS LAST

Questionnaire (4/7)

I sometimes start my journey from a different place, and this is not close to a railway station
I sometimes work/study [as appropriate] at a different site, and this is not close to a railway station
It is quicker to use a different mode on these days
It is more cost effective to use a different mode on these days
It is the less stressful than travelling by train on these days
Trains do not run early enough on these days
Trains do not run late enough on these days
Trains do not run frequently enough on these days
Trains do not run at all on these days
It depends on the weather
If depends on car parking availability
I have other commitments on some days which means it is less convenient for me to travel by train (e.g. hobbies, socialising, childcare)
I am able to share lifts on these days (e.g. lift/car sharing arrangement)
I have to take heavy/bulky items or luggage with me
Other (Please specify)

Q14. When you commute to work/education [as appropriate] by train, which stations do you usually travel between?
*Please write in the National Rail stations that you travel between. If the stations that you travel between vary, please write in the stations that you travel between **most often***
Starting station (home): *Type in*
Destination station (work/place of education) [as appropriate]: *Type in*

Your working hours

Q15. Which of these statements best describes your pattern of working/attending your place of education [as appropriate]?

STATEMENTS TO APPEAR ON SCREEN IN THE 'BATCHES' SHOWN BELOW (ROTATE) & RESPONDENT CAN PICK ONE STATEMENT FROM EACH 'BATCH' ONLY

BATCH 3

I can choose the times of day that I work/attend a place of education [as appropriate]
The times of day that I work/attend a place of education [as appropriate] are fixed and I cannot change them

BATCH 4

Please think about the hours that you attend your place of work/education [as appropriate]. Do not include any times when you are unexpectedly early or late.

I start and finish work/education [as appropriate] at the same time everyday
I usually start and finish work/education [as appropriate] at the same time every day but it occasionally differs
The times that I start and finish work/education [as appropriate] can vary from day to day

IF START/FINISH AT SAME TIME OR USUALLY DO AT Q15 BATCH 4:

Q16. At what time do you usually start and finish work/education [as appropriate] IF COMMUTE AT THE WEEKEND, ADD: on a weekday (Monday to Friday)?

Please write in the times in the boxes below using the 24 hour clock (e.g. 9am = 09:00 and 5:30pm = 17.30)

Start time: *TYPE IN*

Finish time: *TYPE IN*

IF WORK/STUDY ON SATURDAY OR SUNDAY AT Q6 OR EVERY WEEK/REGULARLY/OCCASIONALLY AT Q5:

Q17. When you work/attend a place of education [as appropriate] at the weekend, at what time do you normally start and finish work/education [as appropriate] on these days?

Please write in the times in the boxes below using the 24 hour clock (e.g. 9am = 09:00 and 5:30pm = 17.30)

SHOW DAY(S) WORKED/STUDIED AT Q5/Q6 ONLY

Saturday (START AND END TIME BOXES)

Sunday (START AND END TIME BOXES)

Q18a. How often, if at all, do you get the first train on your route when you commute by train?
Regularly Occasionally Rarely Never Don't know

SHOW DAYS EVER WORKED AT Q5/6 AS FOLLOWS:

Monday to Friday

Saturday

Sunday

ASK ALL WHO REGULARLY OR OCCASIONALLY CATCH FIRST TRAIN AT Q18a

Q18b Is that first train early enough for your needs when commuting?

Yes

No

Q19a. How often, if at all, do you get the last train on your route when you commute by train?

Regularly Occasionally Rarely Never Don't know

SHOW DAYS EVER WORKED AT Q5/6 AS FOLLOWS:

Monday to Friday

Saturday

Sunday

ASK ALL WHO REGULARLY OR OCCASIONALLY CATCH LAST TRAIN AT Q19a

Q19b. Is that last train late enough for your needs when commuting?

Yes

No

Q20. Which method(s) of transport do you use most often when travelling from your home to the National Rail station at which you start your journey when you travel to your place of work/education [as appropriate] by train?

Select all that apply

Questionnaire (5/7)

Walk
Car – driving myself
Car – given a lift by a friend/relative/colleague
Car – car sharing arrangement
Bicycle
Bus
Underground train
Light railway/DLR
Tram
Motorbike/moped
Van
Taxi
Coach
Ferry/Riverboat
Other (Please specify)

The train tickets used for your commute

Q21a. What ticket type do you use when you commute to work/education [as appropriate]?

Please tick all that apply

Anytime single/return
Off peak single/return or Off peak day single/return
Super off peak single/return or Super off peak day single/return
Advance
Day Travelcard
Pay As You Go smartcard ticket (e.g. Oyster in London)
Weekly season ticket (including Travelcard/smartcard)
Monthly or longer period season ticket (including Travelcard/smartcard)
Annual season ticket
Special promotion ticket (e.g. rover ticket)
Rail Staff Pass/Privilege Ticket/Police Commission GO TO Q22
Free travel pass (e.g. freedom pass) GO TO Q22
Q22
Other (Please specify)

IF NO SEASON TICKET MENTIONED AT Q21a

Q21b. Why do you choose not to use a season ticket for your commute?

RANDOMISE

I don't travel on enough days to make this worthwhile
I am able to get a cheaper fare if I do not use a season ticket
A season ticket is too expensive to pay for all at once
I prefer to buy individual tickets
I sometimes use different modes of transport
I commute to different destinations on different days
Other (Please specify)

IF COMMUTE FOR WORK ONLY AT SCREENING Q1a OR MOST OFTEN AT Q1b

Q22. What would you estimate the percentage of your income (after tax and deductions) that you spend on commuting to be?

Please include everything that you spend on all modes of transport that you use to commute to work

Less than 5%
6-10%
11-15%
16-20%
21-25%
26% or more
Don't know

ASK ALL

Q23a. How likely would you be to use either of the following when travelling to your place of work/education [as appropriate] by train...?

SHOW ONE PER SCREEN [ROTATE] WITH THE FOLLOWING SCALE

Definitely would use
Probably would use
Probably would not use
Definitely would not use
Not sure

A **carnet ticket** which allows you to buy several single tickets (for example ten journeys) in bulk at a preferential rate, which would be cheaper than a standard single ticket. You can then use these to travel on different days, as and when you need them.

An **off-peak season ticket** which allows you to travel on any train on your route which do not fall within 'peak' times of 7am-10am and 4pm-7pm. This would be less expensive than a normal season ticket (which allows you to travel at any time of day, including peak times).

FOR EACH TICKET PRODUCT WOULD LIKE TO USE AT Q23a:

Q23b. You said that you would like to use [a carnet/off peak season ticket]. Why is this?

TYPE IN

REPEAT FOR BOTH OPTIONS IF SELECTED

Commuting journeys you have made in the past

Q24. Approximately how long have you been commuting by train between xxxxx and xxxxxx? [INSERT STATIONS AS GIVEN AT Q14]

Please think about how long you have been using the train as your main mode of transport for this journey

Less than 6 months
For the last 6-12 months
For the last year
For the last 2 years
For the last 3 years
For the last 4 years
For the last 5 years
For 6-10 years
For longer than 10 years

Questionnaire (6/7)

Q25. Before you first started making this journey by train, did you previously make this journey by any other mode of transport?

No - I have only ever travelled to my place of work/education [*as appropriate*] on this route by train

Yes - I used to travel by another mode of transport before I started using the train

IF YES AT Q25

Q26. Before you started making this journey by train, which other main mode(s) of transport did you use to make this journey?

Walk

Car – driving myself

Car – given a lift by a friend/relative/colleague

Car – car sharing arrangement

Bicycle

Bus

Underground train

Light railway/DLR

Tram

Motorbike/moped

Taxi

Coach

Ferry/Riverboat

Other (Please specify)

IF NO AT Q25

Q27. Compared with when you first started making this journey to your place of work/education [*as appropriate*], do you now....?

Travel by train much more often than before

Travel by train a little more often than before

Travel by train about the same amount as before

Travel by train a little less often than before

Travel by train much less often than before

IF USED TO COMMUTE BY ANOTHER MODE AT Q25

Q28. Why did you decide to start making the journey by train instead of by another mode of transport?

Please select all that apply

RANDOMISE

Train has become more affordable

Other modes of transport have become too expensive

I live closer to a railway station than I did before

I work/study [*as appropriate*] closer to a railway station than I did before

I have no/less access to a car

There are fewer alternative public transport options than there were before (e.g. bus)

Trains now run at more convenient times than they did before

Trains now run more frequently than they did before

Trains now go to destinations that they did not go to before

Other (Please specify)

IF ANSWERED Q28 – GO TO CLOSE

IF NOW COMMUTE BY TRAIN MORE AT Q27

Q29a. Why do you now use the train more than you did before for this journey?

Please select all that apply

RANDOMISE

Train has become more affordable

Other modes of transport have become too expensive

I live closer to a railway station than I did before

I work/study [*as appropriate*] closer to a railway station than I did before

I now work/study [*as appropriate*] more days than I used to

I have no/less access to a car

There are fewer alternative public transport options than there were before (e.g. bus)

Trains now run at more convenient times than they did before

Trains now run more frequently than they did before

Trains now go to destinations that they did not go to before

Other (Please specify)

IF NOW COMMUTE BY TRAIN LESS AT Q27

Q29b. Why do you now use the train less than you did before for this journey?

Please select all that apply

RANDOMISE

Train has become less affordable

Other modes of transport have become more affordable

I live further from a railway station than I did before

I work/study [*as appropriate*] further from a railway station than I did before

I now work/study [*as appropriate*] fewer days than I used to

I now work/study [*as appropriate*] at home more than I used to

I now have access to a car

There are more alternative public transport options than there were before (e.g. bus/tram)

Trains run at less convenient times than they did before

Trains run less frequently than they did before

Trains no longer go to some destinations which they did before

Other (Please specify)

GO TO CLOSING SECTION

Questionnaire (7/7)

CLOSING SECTION

These final few questions about you are to ensure we interview a cross section of passengers.

ASK ALL

QX. Which age group do you fall into?

- 16-25
- 26-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+

ASK ALL

QY. Are you...?

- Male
- Female

ASK ALL

Q. In which region of the UK do you live?

- North East
- North West
- Yorkshire & Humberside
- East Midlands
- West Midlands
- East of England
- London
- South East
- South West
- Northern Ireland
- Scotland
- Wales
- Isle of Man
- Jersey
- Guernsey
- Isle of Wight
- Other (Please specify)

ASK ALL COMPLETING COMMUTER SECTION

QZ. To enable us to look at the distance you travel between home and your place of work/education [*as appropriate*] it would be very helpful if you could tell us the postcodes of these locations. The postcodes will **only** be used to calculate the distance in our analysis.

Please could you enter the postcodes below:

If you cannot remember the full postcode, please just leave the first part (e.g. NE2, SW19)

HOME POSTCODE:

Don't know/can't remember

Prefer not to say

PLACE OF WORK/EDUCATION [*as appropriate*] POSTCODE

Place of work/education [*as appropriate*] varies

Don't know/can't remember

Prefer not to say

ASK ALL

Thank you very much for your help in completing this survey. The results will be published by Passenger Focus and will be used to help improve passengers' experiences when travelling by train.

If you would be interested in receiving an email with details of the findings from this research once these are published in a couple of months, please tick the box below.

OPT IN TICK BOX

CLOSE SURVEY



Understanding rail passengers – the ‘average’ commuter

May 2013

Contact: Keith Bailey, Research Team, Passenger Focus
Fleetbank House, 2-6 Salisbury Square, London, EC4Y 8JX
Tel: 0300 123 0822 Email: keith.bailey@passengerfocus.org.uk