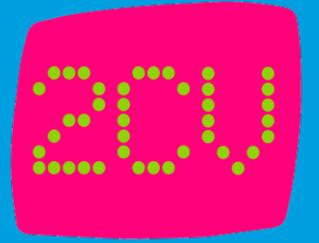


Value of travel time

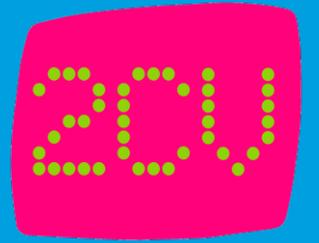
Integrated debrief

March 2016

Contents

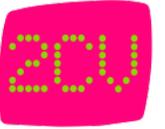


- 1 Background, approach and sample
- 2 Key findings
- 3 Summary and recommendations



Background, approach and sample

Background to the research



- The time used in order to travel to a destination is seen by **transport planners as a 'disutility' or burden**. As a result LU treats travel time as 'dead time' and encourages all parts of the business to reduce customers' duration of travel. Less time travelling is assumed to be desirable and beneficial to the economy as well as individuals.
- LU were looking for a fresh **customer perspective** on the value of their travel time. To unearth how customers fill their time and more importantly, what value do they place on travel time and participation in activities.
- This new research provides LU with a unique understanding of how customers view their travel time and provides LU with new knowledge to inform its current business case metrics and identify ways to capitalise on the value of travel time for customers.



Business and research objectives



Business Question

What is the value of travel time for customers on London Underground? What impact does this 'value' have to LU's business case modelling and wider customer strategy?

Overarching research objectives

- Explore who, when and in what way travel time is used by LU customers
- Explore the value of that travel time use (personal, social, environmental). What are the positive benefits of time spent travelling?
- Understand what LU can do to help customers value their travel time even more
- Measure the strength of the relationship between use of travel time and customer satisfaction

Our approach



Stage 1: 2015

Understanding the who, what, when

1. Desk Review & expert interviews

2. Observations on LU

Stop and Think

3. Auto-ethno & accompanied journeys

Stop and Think

4. Quantitative Measurement

Stage 2: 2016

To understand the why, how and to what benefit

Qualitative approach: digital auto ethnographies and accompanied journeys



AUTO-ETHNOGRAPHIES

What: 20 participants completed a week long diary using the 2CV Momento App.

During the week they tracked their journeys:

- What they were doing
- How they felt during their journey
- How they experienced time on the journey
- What factors influenced this

Why: To capture rich in-the-moment data about customer journeys and experiences across a range of journeys and moments in time

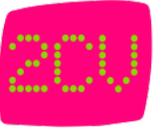
ACCOMPANIED JOURNEYS

What: 10 participants were accompanied on 1-2 hour journeys/interview sessions to understand in more detail how they spent their time and what influenced this.

Why: To understand in more detail what impacts how customers spend their time, the specific and nuanced influence of TfL and what TfL could potentially do to improve the customer experience of time

All of the quotes and the photos in this report come from the qualitative research. These quotes are shown in blue quote bubbles.

Quantitative approach: exit interviews and online survey



EXIT INTERVIEWS

What: 7 minute survey with 607 passengers as they exit LU stations.

Including short and direct questions as passengers are exiting stations

Why: To capture data on use and perceptions of this time in the moment of travel and to explore the link with CSS and reputation metrics

All data from this source is shown in pink throughout the report

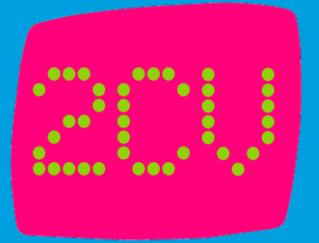
ONLINE SURVEY

What: 15 minute online survey with a representative sample of 509 LU customers

Including more exploratory and in-depth quantitative questions when customers have the time to reflect and respond

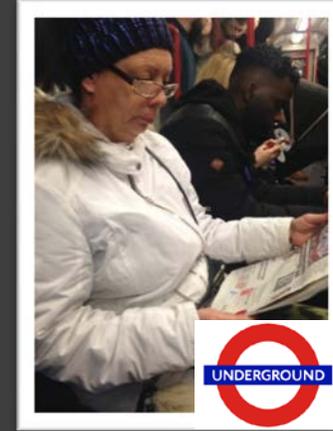
Why: To explore in more depth customer perceptions of how they spend their travel time in general, the quality and value of this time in their lives, and what LU could do to improve this time

All data from this source is shown in purple throughout the report



What do customers think and feel about travel time?

Travel time in your customers' words...



When I leave home I've still got my 'work hat' on...then when I get to the other end I've got my 'daddy hat' on... The time in between is 'me time'... I can just do what I want

It's one of the only times in the day when I get to sit and relax

I feel I use my time well - that's one of the reasons I don't drive as it frees up my time to do other things while I travel. I find the time useful and often productive as I read, plan another day or even relax!

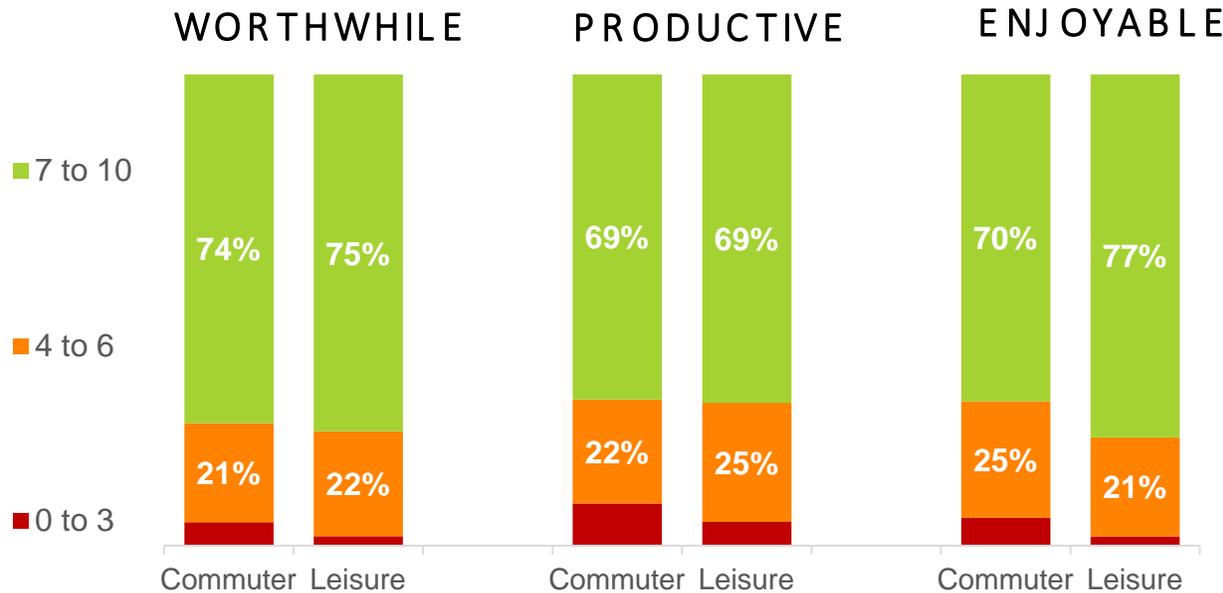
Travelling is a distinct time in the day for people to use as they please

Travelling on London Underground is worthwhile, productive and enjoyable for the majority; it is not a disutility



Thinking about what you have done on this journey, how would you rate your use of time?

Agreement (0-10)



I was looking at Facebook on the tube when I saw this image...made me laugh ...Sometimes the only free time I get is travelling on the tube so it has its good points.



Many see travel time as a gift; an opportunity for 'me time'

- Many see **travel time as a 'gift'** – a unique time period no longer seen as just 'waiting time'
- Travel time **expands your leisure time**; can decide how to spend it
- Can be used for:

Transition

- An opportunity to get ready for the demands of the destination

Time out/Time for

- Give travellers time to be by oneself, 'Me time'
- Some are quite keen to 'defend' this time from the pressures of work and home

Doing

- Scheduling Time/ getting things done
- Activities such as listening to music, reading, browsing

I read, plan another day or even relax!



Almost half would miss the time they spend travelling on LU...

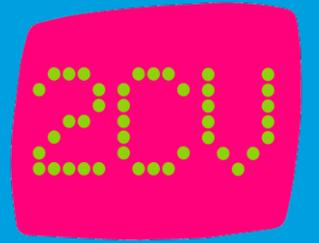


47%

I feel like the time I spend travelling has value, and I would **miss it if I did not have to travel from A to B**

53%

I wish I could skip my travel time altogether and arrive directly where I need to be

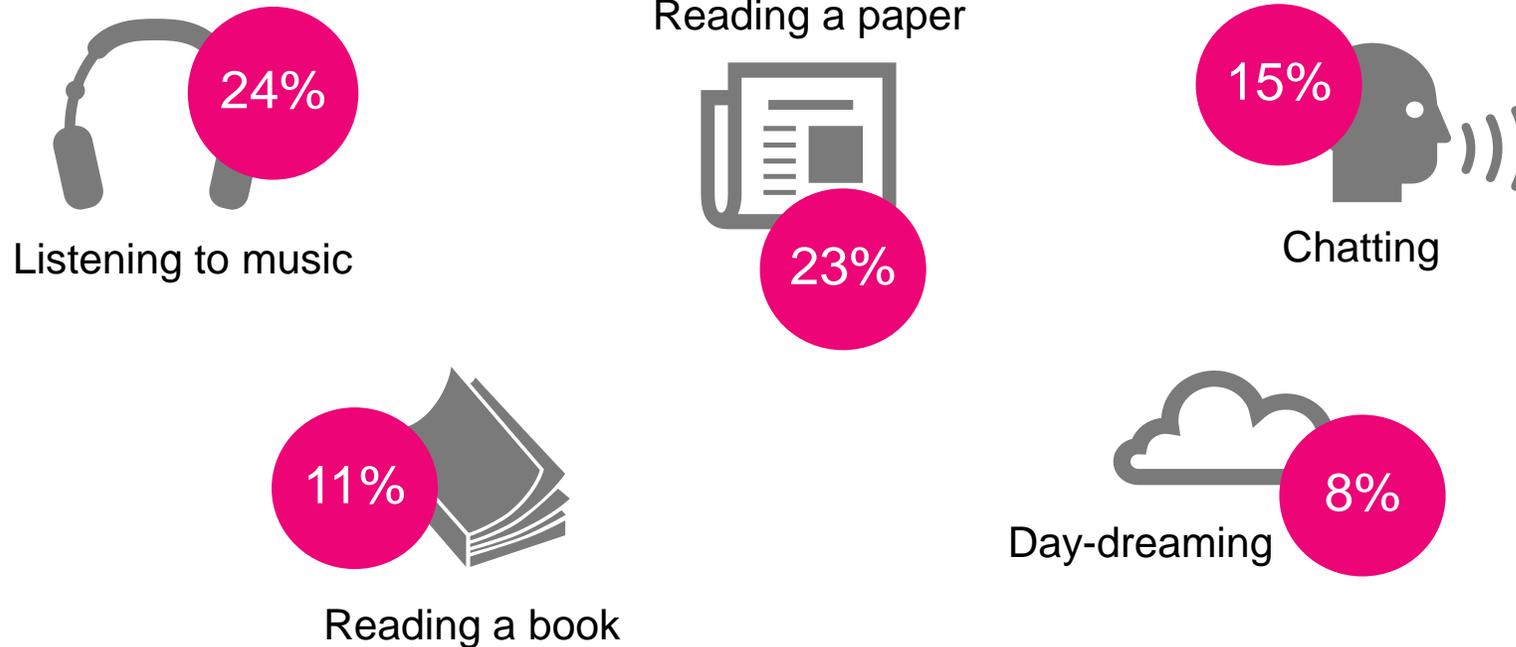


What are customers doing with their time?

Passengers choosing to use this time to do a variety of things..



What did you do during this journey – include everything (top 5)



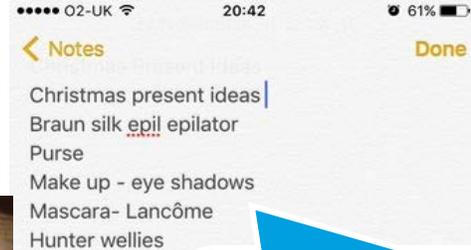
Doing these activities makes the experience on LU more enjoyable...



Listening to Chris Moyles, makes me laugh and chills me out before getting home. Really enjoy listening on the way home to clear my mind

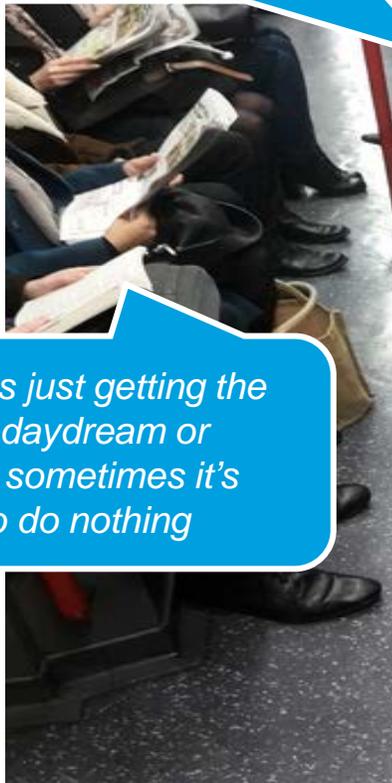


I will be reading this on my way to work. I get this every week



Writing my Christmas present idea list .. So excited for Christmas and a creative use of my time to think about presents for myself and for family and friends

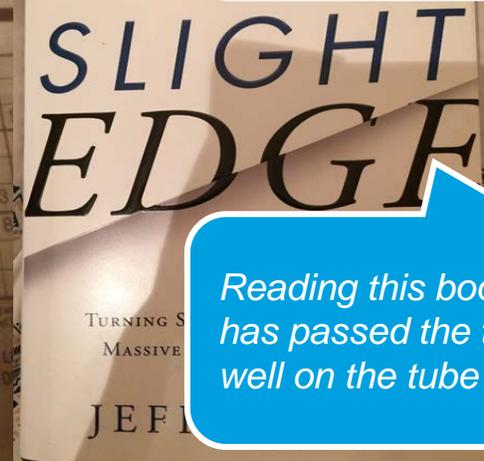
Sometimes just getting the chance to daydream or switch off, sometimes it's nice just to do nothing



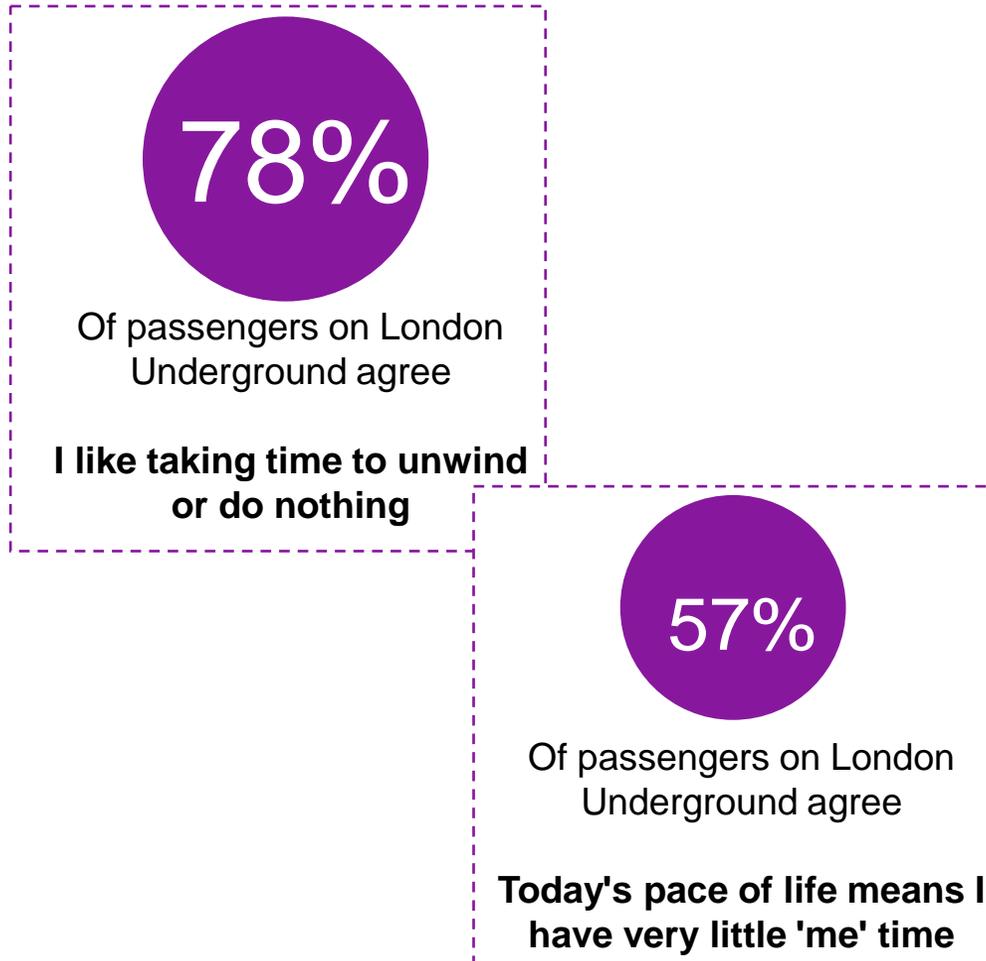
The crossword enables me to have a relaxed journey



Reading this book has passed the time well on the tube

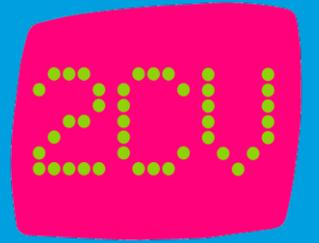


Although sometimes simply gazing/daydreaming is satisfying. This quiet bubble of 'me time' can be a rarity for people in London

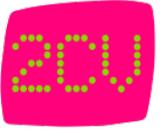


- Commuters in London particularly agree that today's pace of life means that there is **very little 'me' time**
- Travelling on London Underground allows passengers to **create a bubble**, and they are free to do what they like within this bubble
 - Passengers can take this **time to unwind**, and this can mean just staring, gazing or sleeping
 - Whilst it may seem that these passengers are not 'maximising' their travel time, they are **making the most of this rare pocket of 'me time'**

Sometimes just getting the chance to daydream or switch off, sometimes it's nice just to do nothing



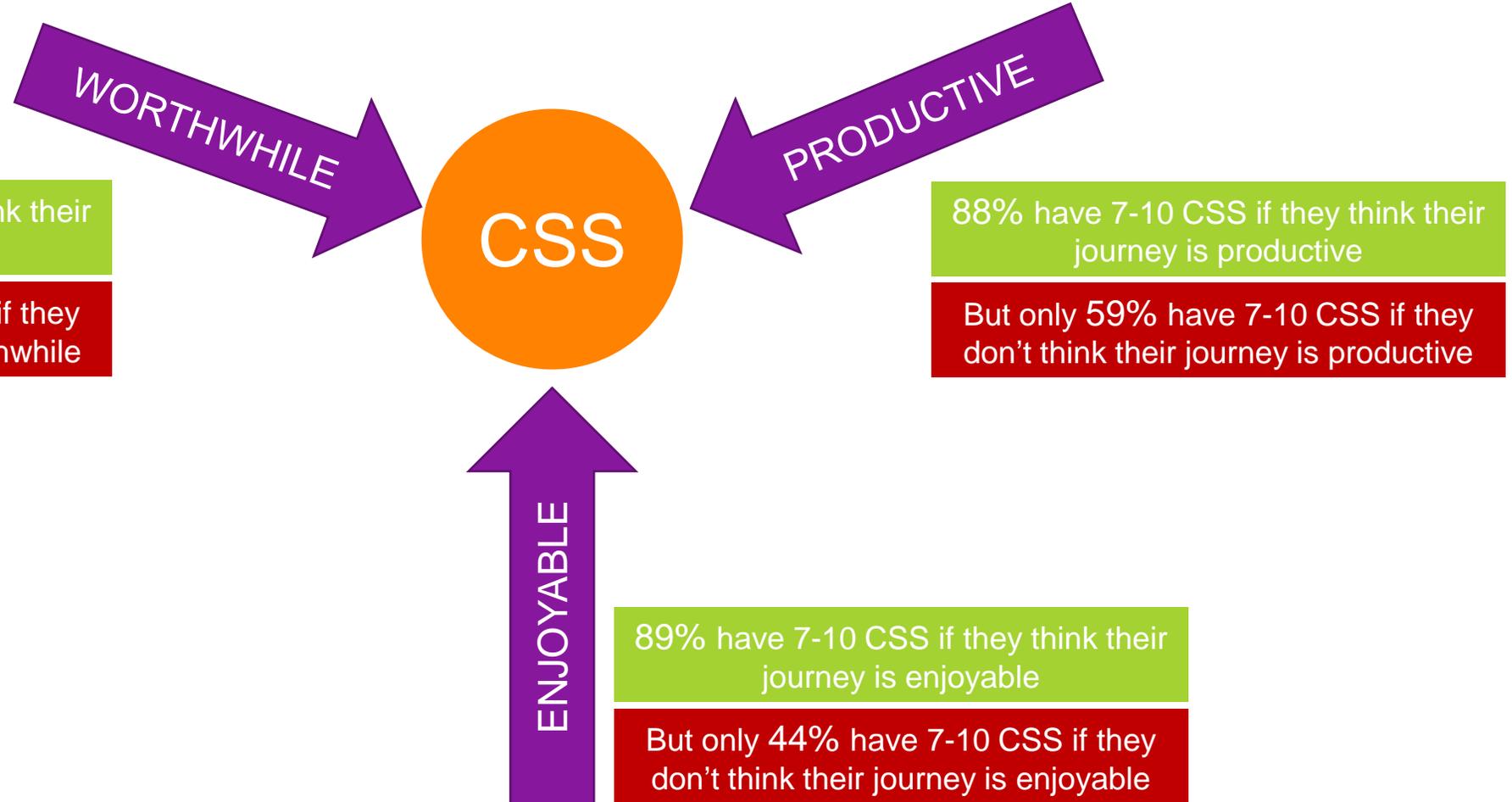
**Is there a relationship between
experience of time and CSS?**



The feeling that a journey is worthwhile, enjoyable or productive increases overall satisfaction

Satisfaction with LU according to perceptions of choice

Satisfaction (CSS 7-10)



Feeling in control of this time also drives satisfaction on LU



Of passengers on London Underground feel they **have a choice over how they spend their time**

My worst nightmare - crowds of people and all pushing and shoving I cannot get a seat cannot read and have someone's armpit in my face

Satisfaction with LU according to perceptions of choice

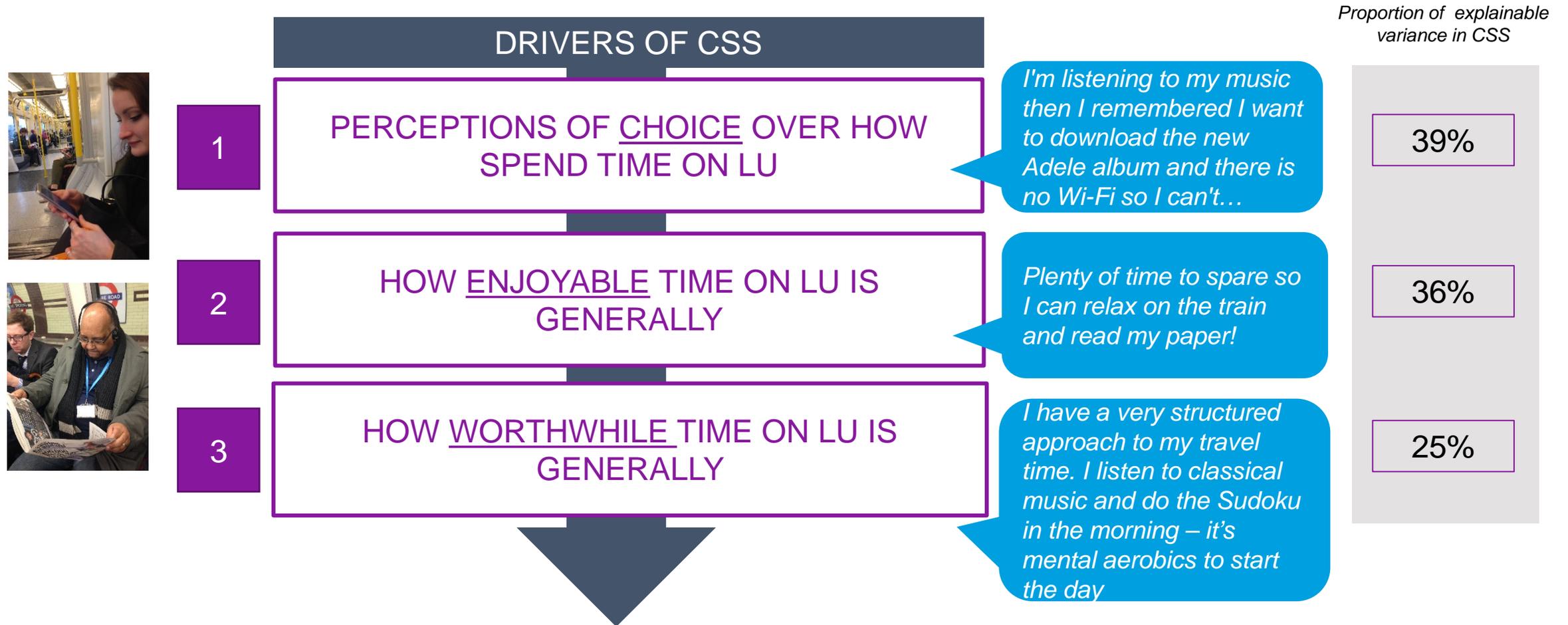
Satisfaction (CSS 7-10)

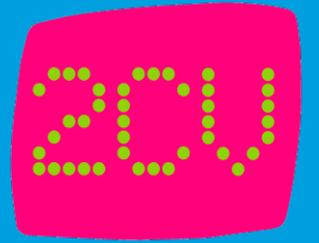
82% have 7-10 CSS if they feel they have choice over how they spend their time

But only 49% have 7-10 CSS if they don't feel they have choice

Feelings of control, enjoyment and worthwhileness each make an important contribution to CSS levels

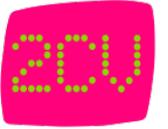
Outputs of drivers analysis [online survey data]





What influences customer experience of time?

Time is not a constant, and experience is highly subjective



- Our **experience of time** on journeys is affected by many factors
 - Emotional state
 - Built environment
 - Social context
 - Distractions / engagement level
- **Time has a 'stretchiness'**; periods can feel like they pass more quickly or more slowly depending on these factors
 - What 'feels' like a quick journey may be different to what is actually a quick journey
 - Perception of time as 'productive' will be made up of many different elements, and can be subjective



Reading this has passed the time well on the tube

Feeling in control of time is key and two factors influence this



Personal factors

How good I am at using my time

Planning ahead

*Feeling comfortable on the Tube in general
(less d-psychology sensitive)*

System factors

Level of crowding and comfort

Availability of information – TfL

*Availability of personal data – on
device/3G/Wifi*

Need to focus on journey/navigation

Personal factors: planning for a journey on LU increases perceived control and has a positive impact; ‘filling’ rather than ‘killing’ time

- Planning the time spend on LU helps to **maximise it’s potential**
 - Regular LU users are more likely to be ‘planners’
 - There is a certain ‘**tube etiquette**’ among planners, who engage more in ‘solo’ activities
 - Irregular tube users are more likely to be chatting to a friend or eating – this goes against ‘tube etiquette; they are less likely to rate their journeys as productive

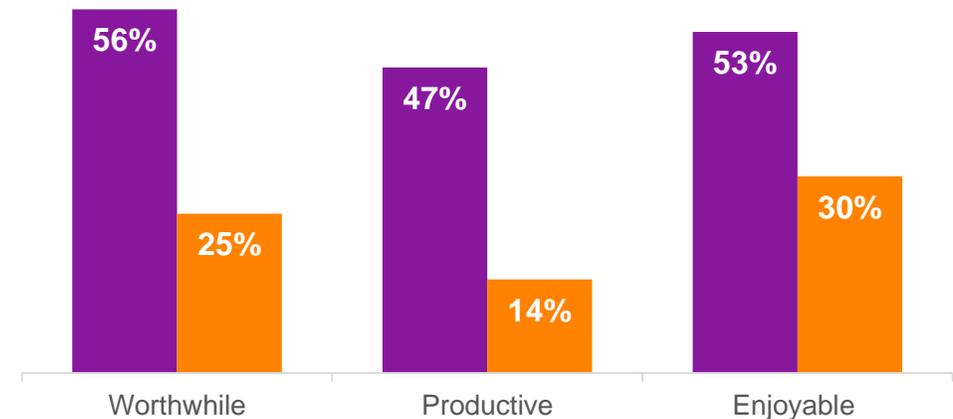
When I have downloaded programmes that I like on my iPad it makes time go a lot faster on tube journeys so I always try to make sure my iPad is charged



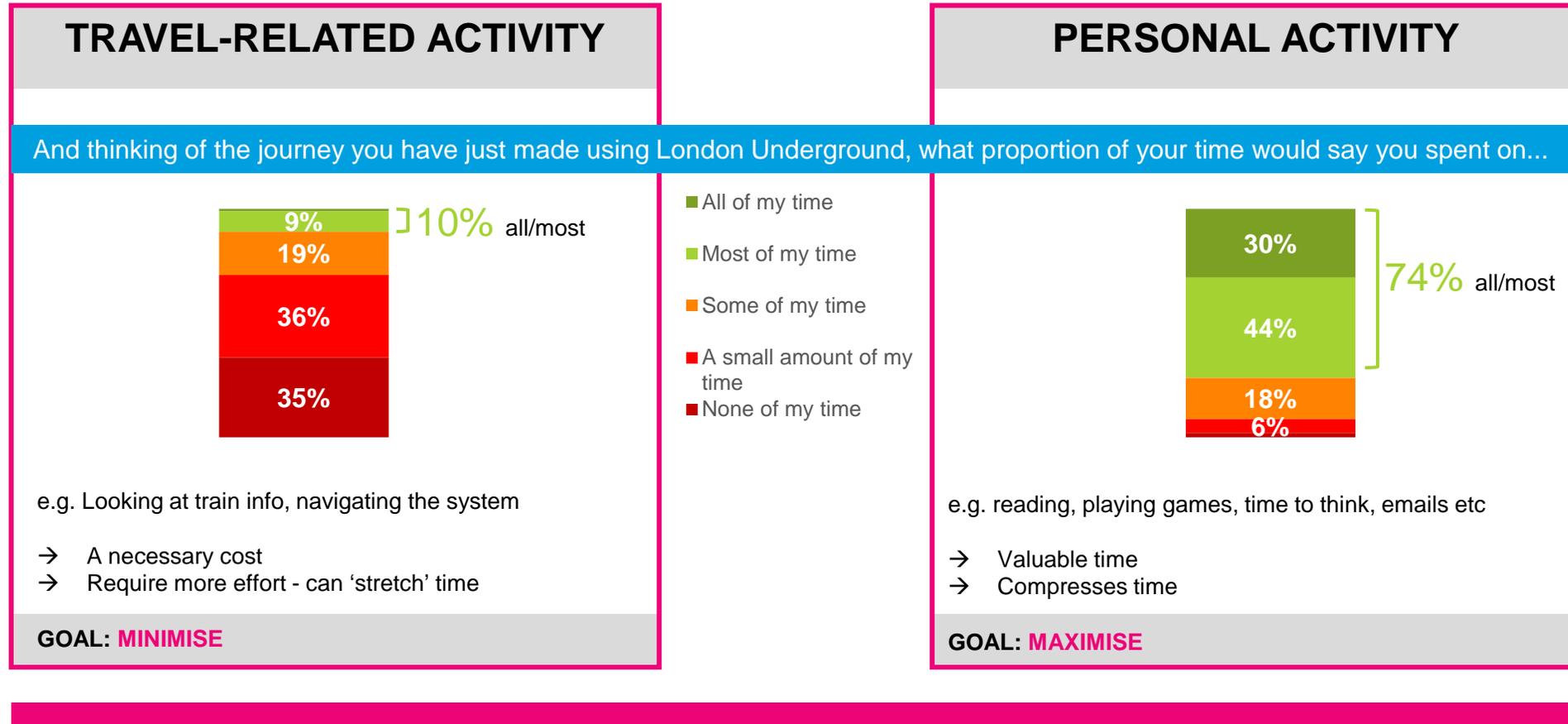
Ratings of journey / do they plan their time

Agreement (1-5)

- AGREE: I always have something to do to pass my time while travelling on the Underground
- DISAGREE: I always have something to do to pass my time while travelling on the Underground



System factors: triggers can detract from 'personal' time and force passengers to be engaged in 'travel' related activities



There are many other triggers which diminish ‘control’ over activity type, these include...



Inability to estimate travel time



Lack of familiarity



Lack of in-the-moment information

Everyday it's stop start with the same message "we are held at a red signal" you try to zone out but it makes you need to think about whether there's a big problem from time to time



Encroached personal space

I try and be productive with the time spent on the train, but it is dependant on how busy it is

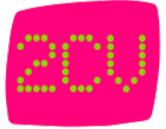


Uncomfortable environment



Excessive external pressures

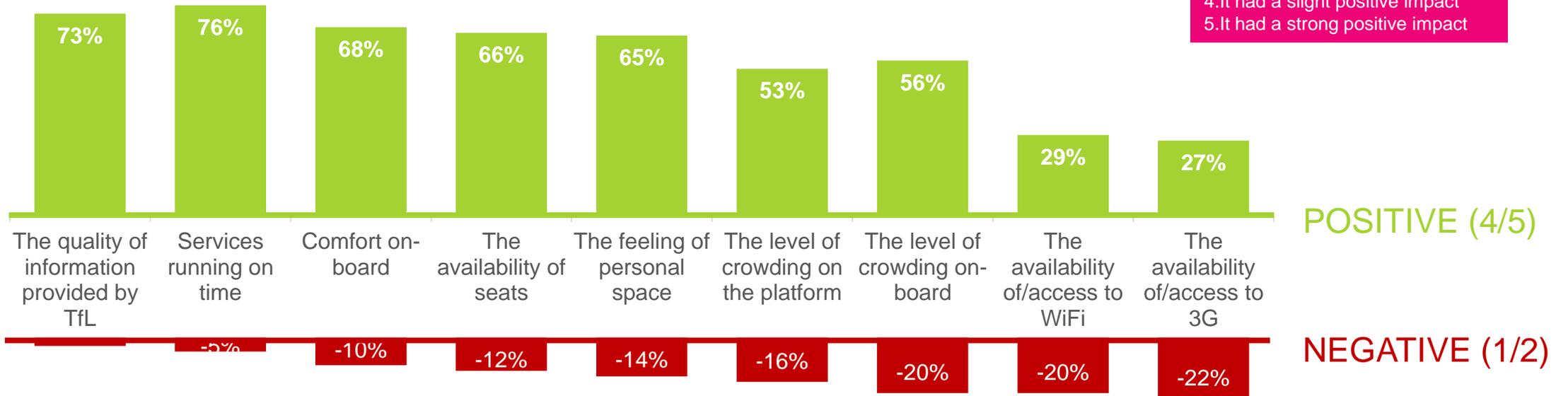
There are positive and negative triggers for each factor that swing LU customers between personal and travel activity

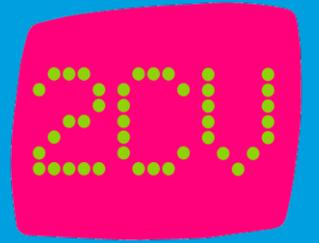


These translate into specific service elements that are having a negative impact on how passengers spend their time travelling on LU

How much did the following aspects of the journey you have just made impact on the quality of your travel time?

Scale:
1. It had a strong negative impact
2. It had a slight negative impact
3. Did not have an impact/ n.a
4. It had a slight positive impact
5. It had a strong positive impact





Summary and recommendations

Summary

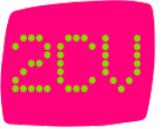


- From a customer perspective **travel time is not a disutility**
 - Many customers see it as a 'gift' or distinct 'me time' in the day
 - Half would miss their time travelling on LU

- Customers use this time for **many different activities** and what they do is simply about individual preference and habits
 - The type of activity does not impact on how they view or experience their time
 - Indeed, customers do not have to be 'doing' anything at all to appreciate this time

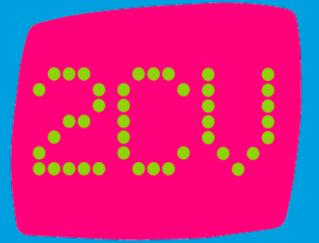
- A **feeling of choice** over how people spend their time is the **top driver of CSS**
 - Followed closely by enjoyment of time and then worthwhileness of that time spent

Recommendations



- Many factors influence customer experience of time that LU can impact:

	Personal factors	Current system factors	Future improvements
<i>Current influence</i>	<ul style="list-style-type: none">• Planning and anticipating of the time they have on the Tube• Feeling they have a choice over how they travel	<ul style="list-style-type: none">• Crowding and comfort• Available information	<ul style="list-style-type: none">• Access to personal information• Pockets of connections
<i>Opportunities</i>	<ul style="list-style-type: none">• Possibilities – remind people of all the things they could do on the tube• Empower – make people feel they have a choice• Entertain – for those who are not planners, improve the in carriage experience for time-passing	<ul style="list-style-type: none">• Create change (TDM) - encourage off peak travel• A nicer place to be – make the environment as safe, easy, comfortable and life enhancing as possible• Support – particularly when things go wrong to allow people to stay calm and in their ‘bubble’	<ul style="list-style-type: none">• Always on (wifi/3G):<ul style="list-style-type: none">• Easier to access• Available underground• Personalisation: use personal data to tailor experience and enhance possibilities as people travel• Entertain – in-carriage digital experiences



Thank you