

## Winning back our customers

October 2021



- The pandemic has had a significant impact on the way people travel around London and on our finances as a consequence
- We have taken action to ensure:
  - Customers feel safe and confident to travel via cleaning and the wearing of face coverings
  - We drive the recovery of London, encouraging people to travel as restrictions lift
- This paper sets out what actions we are taking and the positive outcomes we are achieving as a result

# Ensuring customers feel safe to travel

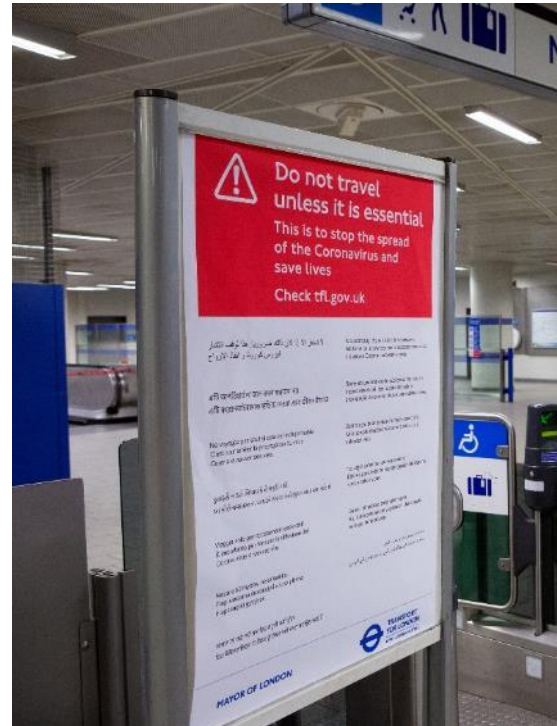


# Ensuring customers feel safe to travel

We remind customers of the requirement to wear face coverings through announcements in stations, emails, whiteboard posters, our website, press activity, marketing campaigns, social media and our engagement with stakeholders and the boroughs

Sources:  
Customer Pulse Tracker

- Customers told us they want to travel on a network that feels safe, clean and orderly
- Specifically, customers want to see the enforcement of face coverings, cleanliness and ventilation before they decide to travel on public transport (e.g., 79 per cent of Londoners say mandatory face coverings is an important aspect in deciding whether to use public transport)



Awareness that wearing of face coverings is mandatory\* = 95 per cent of Londoners

\*As at 2020

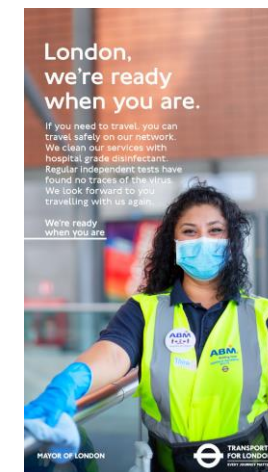
# We have responded by implementing a number of different measures



- Unlike the National Rail network, we made the wearing of face coverings a condition of carriage
- 500+ enforcement officers are supporting staff to enforce compliance
- We promote visible cleaning across the network
- We use anti-viral disinfectant
- We provide hand sanitisers
- The network is independently tested
- We are running a near full service to minimise crowding



- The TfL Go app helps people travel at quieter times to aid social distancing (433k downloads)



- Our safety measures have been supported by a marketing campaign to reassure customers it is safe to travel

We are reminding customers of the requirement to wear face coverings

We promote this customer message through a variety of channels:

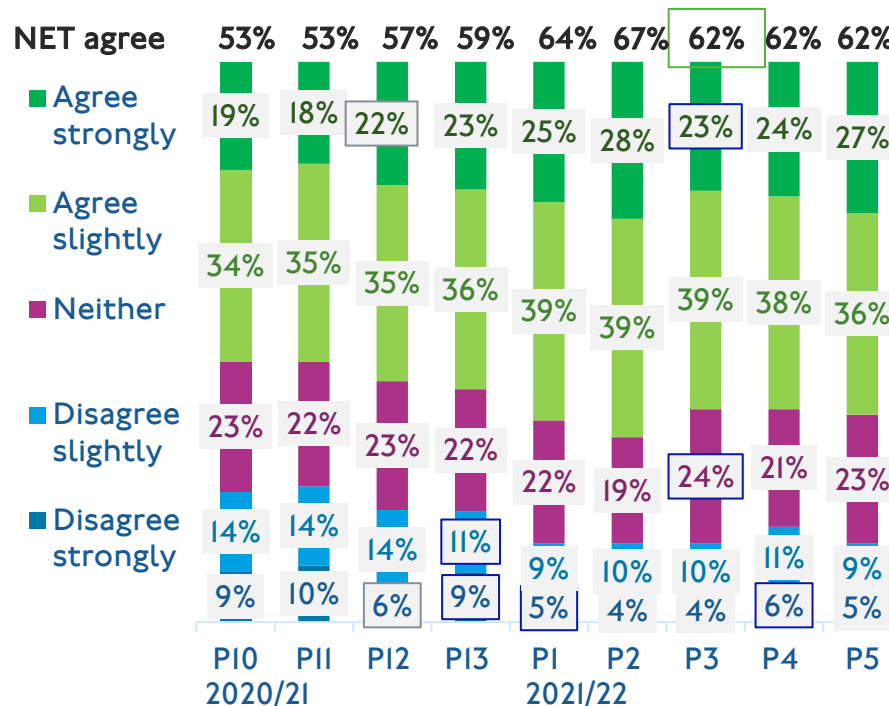
- Station and on bus announcements are played every 15 minutes, with plans for increased frequency
- Whiteboard posters in stations
- Press activity including through our Metro page
- Ongoing marketing campaign
- Engagement with stakeholders, businesses and boroughs
- Regular promotion on social media and our website
- Reminder to customers in travel advice emails

# As a result, Londoners are growing in confidence to travel around London...

The number of Londoners who do not feel confident to travel around London has been falling steadily. Currently, only 14 per cent of Londoners say they do not feel confident.

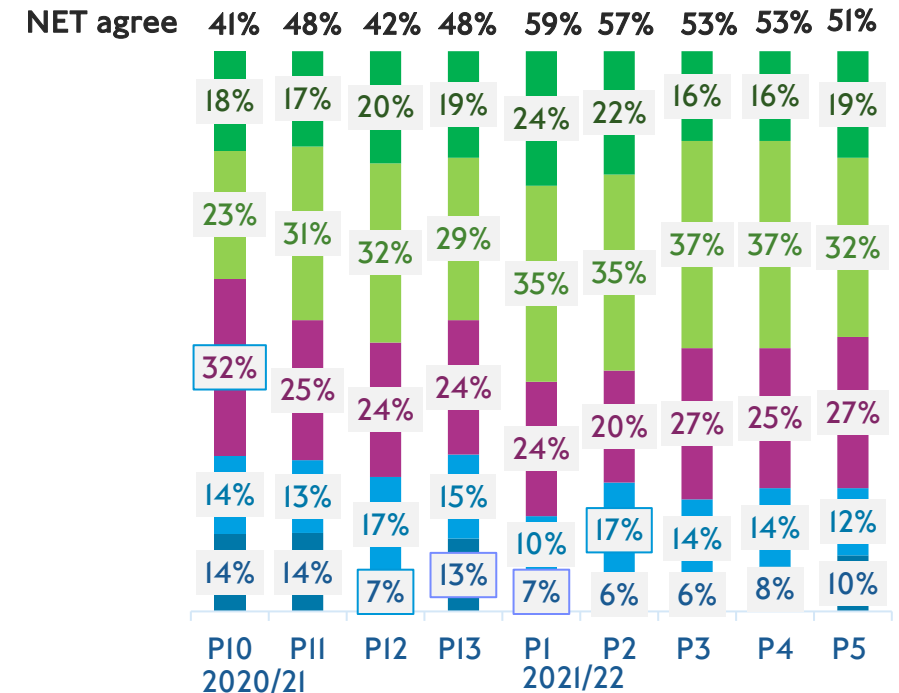
## Customers praise us for taking a stance on face coverings and prioritising safety

"I feel confident to travel around London" (All Londoners)



P5: NET agree among those who have used PT in P7 Days 70% (P4 70%)  
 P5: NET agree among those who have not used PT in P7 Days 46% (P4 46%)

"I feel confident to travel around London" (Disabled Londoners)



P5: NET agree among those who have used PT in P7 Days 64% (P4 59%)  
 P5: NET agree among those who have not used PT in P7Days\*\* 32% (P4 44%)

"I'm getting more familiar and used to it, it's been such a long time since I used it I feel like I need to get back into the swing of things again"  
*Longitudinal Qual (wave 3)*

"I wanted TfL to have more of a stance and I have seen signs saying wear a mask still and I thought at the time 'good on you for taking a stance'" – *Longitudinal Qual (wave 3)*

PT\_01: To what extent do you agree or disagree with the following statements? Base: All respondents P10 (1001), P11 (1004), P12 (1000), P13 (1000), P1 (1003), P2 (1001), P3 (983) P4 (1005), P5 (1002); Disabled Londoners P9 (197), P10 (190), P11 (182), P12 (211), P13 (223), P1 (215), P2 (232), P3 (199) P4 (191), P5 (203)  
 \*SOURCE: Longitudinal Qual Research Wave 3, Aug 2021, TfL & 2CV  
 Contact: amywallis@tfl.gov.uk, Customer Insight, Strategy & Experience

\*\*Low base, under 100

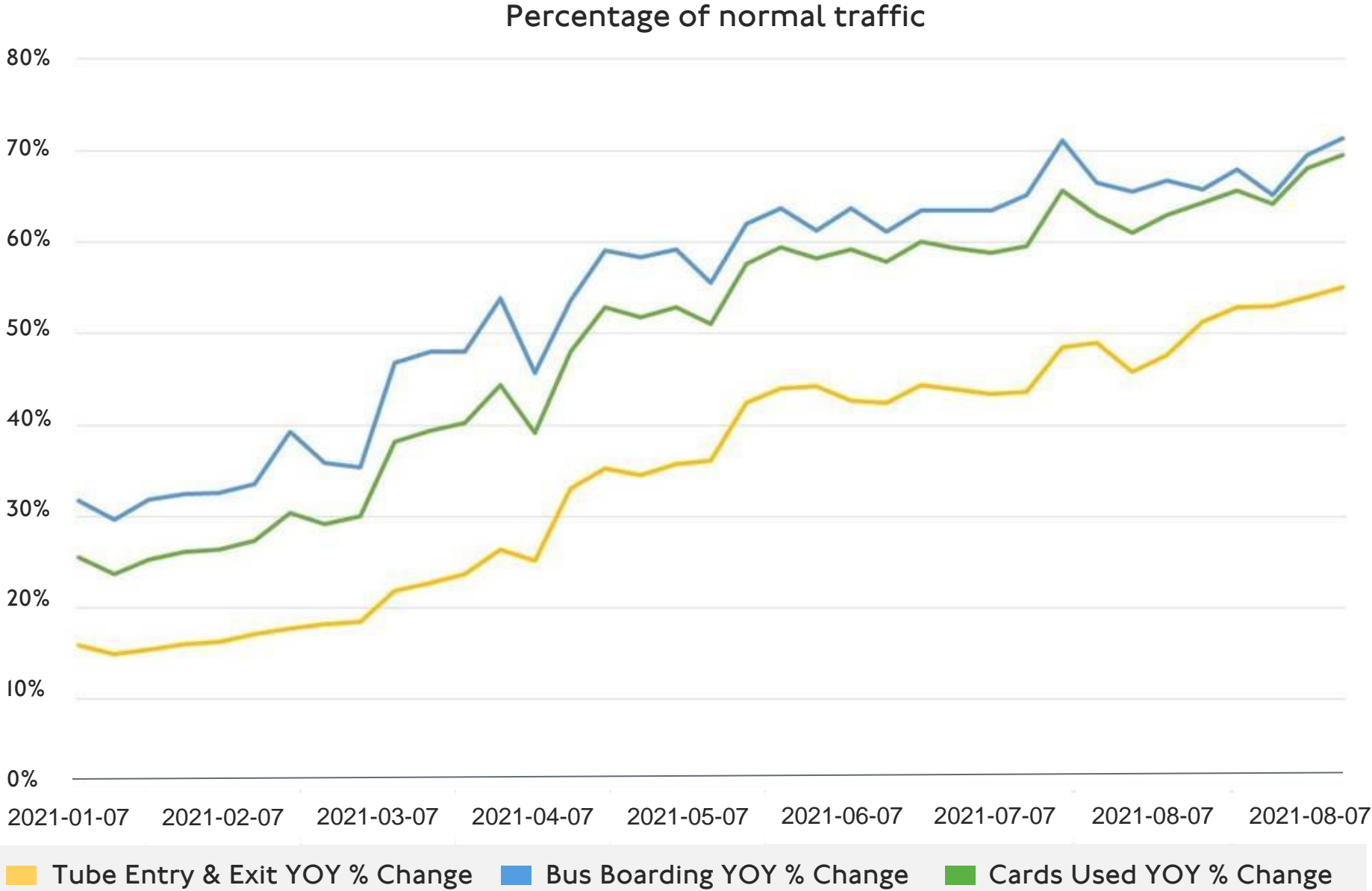
□ Significant difference vs. previous period

# ...and demand is steadily rising

We are closely monitoring daily demand and this has continued to rise as restrictions have eased.

We have made daily Tube and Bus demand data available [online](#), helping people to plan as London recovers.

# Current demand for transport is strong

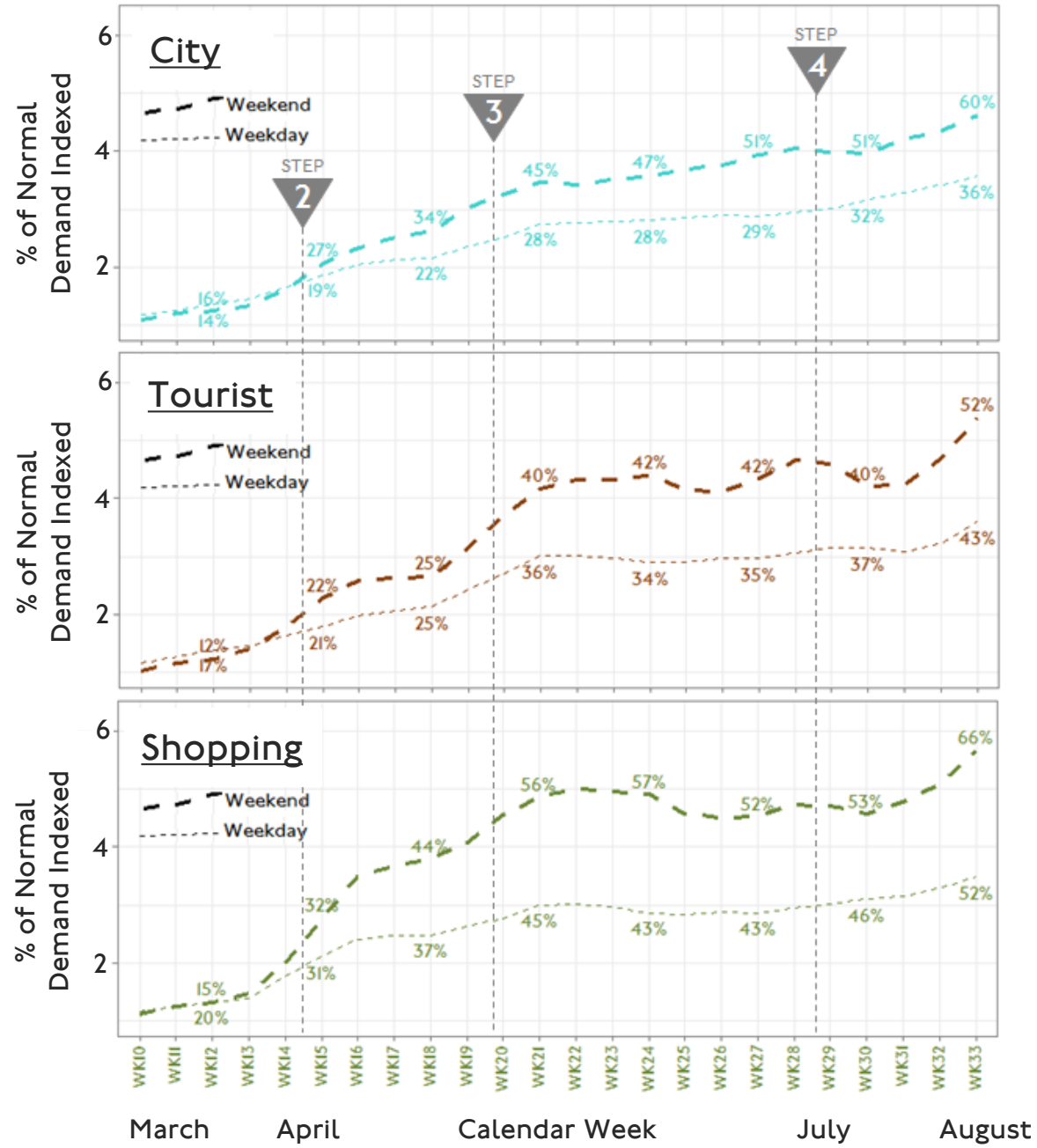




# Weekend demand is recovering faster than weekday demand, though is expected to change as offices start to re-open in September

We are seeing growth in demand, which is driven by the lifting of restrictions. This has created more reasons to travel – such as being able to errands, go shopping and attend sports events.

## Tube and rail ridership by purpose and day of week



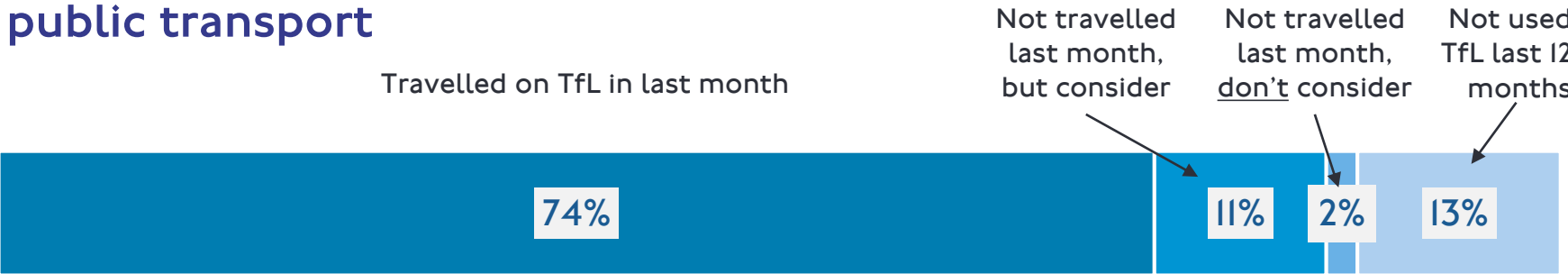
- These charts show how the percentage of pre-pandemic demand at City, Tourist and Shopping stations for weekdays and weekends has changed since March 2021.
- At weekends the rate of growth has been much more pronounced as lockdown measures eased. This suggests that when people have a reason to travel (errands, leisure or otherwise), they are doing so in increasing numbers.
- Weekdays have seen a more gradual rate of growth with steady levels of office/work travel (i.e. to/from city stations) and some leisure activities in the evenings. This is expected to change as more offices start re-opening from September.

# Winning back our customers

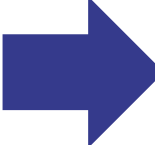


# We have the opportunity to win back customers and journeys as London opens up

## The majority of Londoners have used or would consider using public transport



More than half of those not considering travelling in the near future haven't needed to



But now restrictions are easing, customers are beginning to return to public transport, safe in the knowledge we are prioritising their safety (e.g. enforcing face coverings)



"I'll probably be going shopping and depending on where I am going, I would get either the train to Waterloo or jump on the bus or walk, or bus to High Street Kensington"

"Things are starting to open up again; clubs and bars are open which is absolutely great"

Sources:  
 Winning Customers Back research September 2020 and May 2021  
 Longitudinal  
 Qualitative customer research May and August 2021

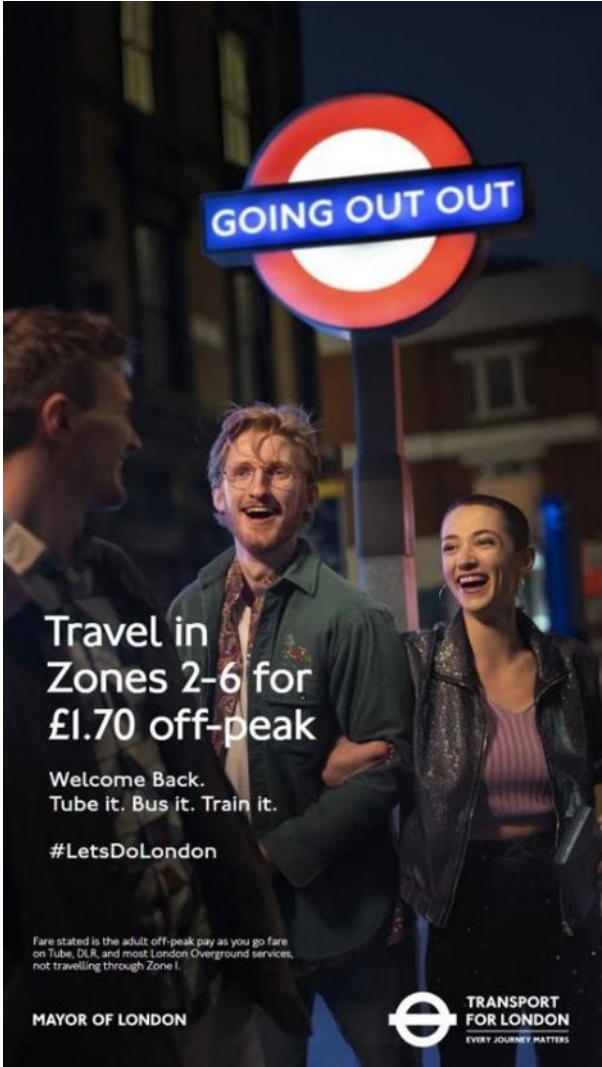


# We are supporting London's unique retail, leisure and hospitality offer...

Our own Welcome Back campaign is reaching 8m Londoners and a national audience, with a motivating and playful TV advert, and we continue to support the promotion of London through national GLA-led national campaigns like Let's Do London.

Reminding customers of the safety of the network is key, confident customers will be more likely to travel.

# We will continue to promote what makes London a great place to live, work and visit



We will continue to connect with our customers around why they travel



...and our TV advert is welcoming back our customers

Our [television advert](#) welcomes our customers back to the network by reminding them what they have missed.

It is running on some of the busiest audience slots on television and has been seen by 4.1m people as well as 1.5m via video on demand, and 0.8m in cinema.


Our YouTube video advertising has been seen 2.9m times.


Our associated social media campaign has generated almost 1m impressions and 500,000 people have [accessed our Let's Do London animated roundels](#).

For Londoners who are returning, safety and real time information are increasingly important, but frequent service, value, and face coverings remain crucial




 Enforcement of face coverings

 Cleanliness

 Visible social distancing measures/ capacity management

 Green box indicates statements that were not previously in the top five

## Top 5 (of c.20) measures to drive satisfaction among current users | Kano performance factor score\*

Bus 	Tube 	Rail modes 
The buses are frequent/ regular 23%	Safe environment 31%	Value for money 31%
Buses cleaned every night with anti-viral products 22%	Value for money 30%	Safe environment 28%
Value for money 22%	Face coverings are enforced 26%	Real time information about disruption available 22%
Safe environment 22%	Real time information about disruption available 24%	Face coverings are enforced 21%
Face coverings are enforced 19%	Trains are frequent 23%	Trains are frequent 20%

Note: Whilst face coverings have potential to drive satisfaction for some, for many they have become a hygiene factor and without this could negatively impact satisfaction

Q | Kano analysis: K1a/K1b/K2a/K2b/K3a/K3b. How would you feel if this feature was present when taking the [mode]? How would you feel if this feature wasn't present when taking the [mode]? Text shown to respondents has been shortened for presentation purposes; full answer text available in appendix. Rail refers to London Overground, DLR or Tram. Base | Travelled on mode in last month and considering using it again; floating base: Bus n=226 Tube n=227, Rail n=225.

Because Face coverings are so crucial to customers, we are reinforcing the message through our comms and a visible enforcement presence

Our customers are required to wear face coverings

**YOU MUST WEAR A FACE COVERING ON TfL SERVICES AND STATIONS**

Please continue doing this at all times when travelling on TfL public transport services and stations, to keep everyone safer. If you do not, you may be refused entry to the network. Please remember that some people are exempt.

For more information, search TfL face coverings.

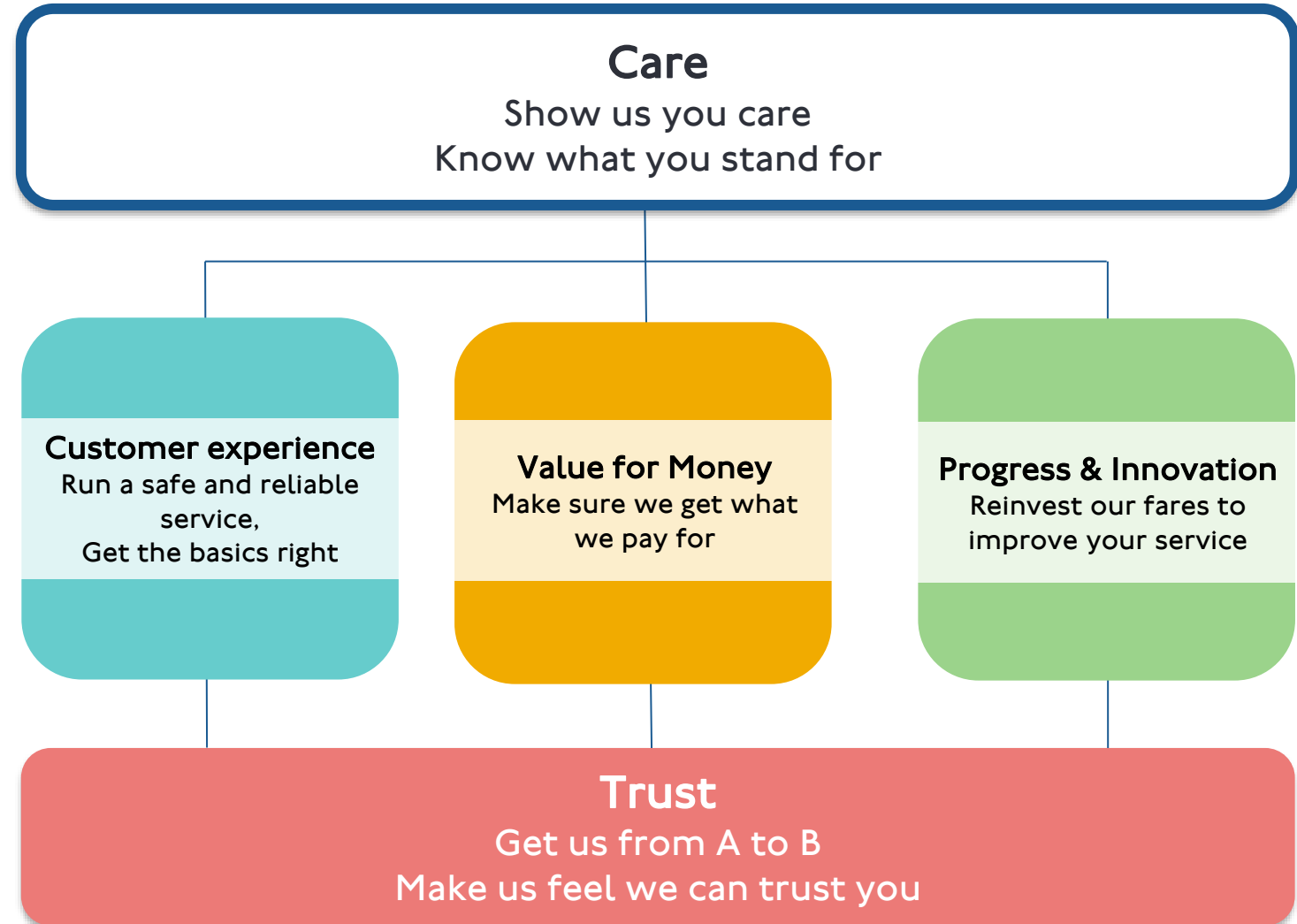
MAYOR OF LONDON

TRANSPORT FOR LONDON  
EVERY JOURNEY MATTERS



Our *Core truths* therefore remain critical: safety and reliability, good value, supported by real-time information is critical

## The TfL Customer Model



Being a trusted organisation is the key driver of our customer care score, consistently delivering a good customer experience will make customers trust us

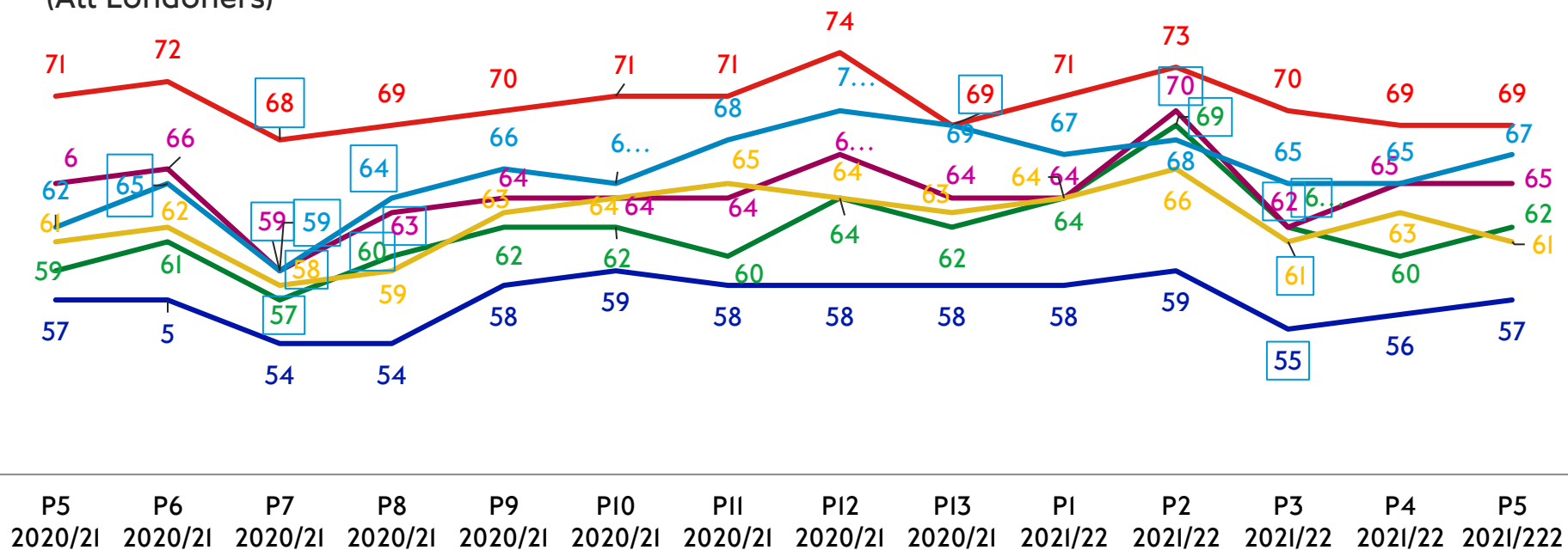
**Customers who trust us will travel with us**



Customers have continued to rate us highly throughout the pandemic, particularly for safety, support and communication

## Key Performance for TfL in P5 2021/22

Key TfL Metrics (Agree %) (All Londoners)



- TfL cares about its customers
- TfL provides a safe service for customers
- TfL is supporting Londoners well during the Coronavirus crisis
- TfL is communicating well with Londoners during the Coronavirus crisis
- TfL gives customers ways to complete their journeys during the Coronavirus crisis
- TfL is an organisation I can trust

RedCoreTFL\_01. How much do you agree or disagree with the following statements about TfL? COV\_06. Now, thinking specifically about the Coronavirus crisis, how much do you agree or disagree with the following statements about TfL?

Base: All Respondents – P5 20/21 (2020), P6 20/21 (2004), P7 20/21 (I050), P8 20/21 (I010), P9 (I003), P10 (I001), P11 (I004), P12 (I000), P13 (I000), P1 (I003), P2 (I001), P3 2021/22 (983), P4 2021/22 (I005), P5 2021/22 (I002)

Note, change in methodology P2 – P6 2020/21 (Periodic to Weekly to Periodic)

Contact: [amywallis@tfl.gov.uk](mailto:amywallis@tfl.gov.uk), Customer Insight, Strategy & Experience

Significant difference vs. previous period

Sources:  
Customer Pulse Tracker



By focusing on  
nine key areas we  
can improve the  
customer  
experience further  
to win back  
customers

1. Boosting public  
transport ridership by  
winning back our  
customers

2. Brilliant basics –  
safety, reliability, the  
environment and design

3. Enhancing customer  
information

4. Ways to pay

5. Affordable and  
accessible travel choices  
for everyone

6. Transforming the  
Tube station customer  
proposition

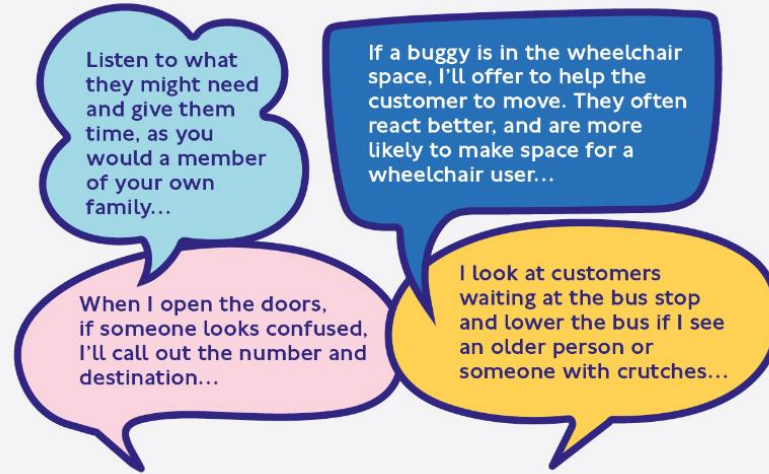
7. Revolutionising bus  
services

8. Roads customer  
proposition

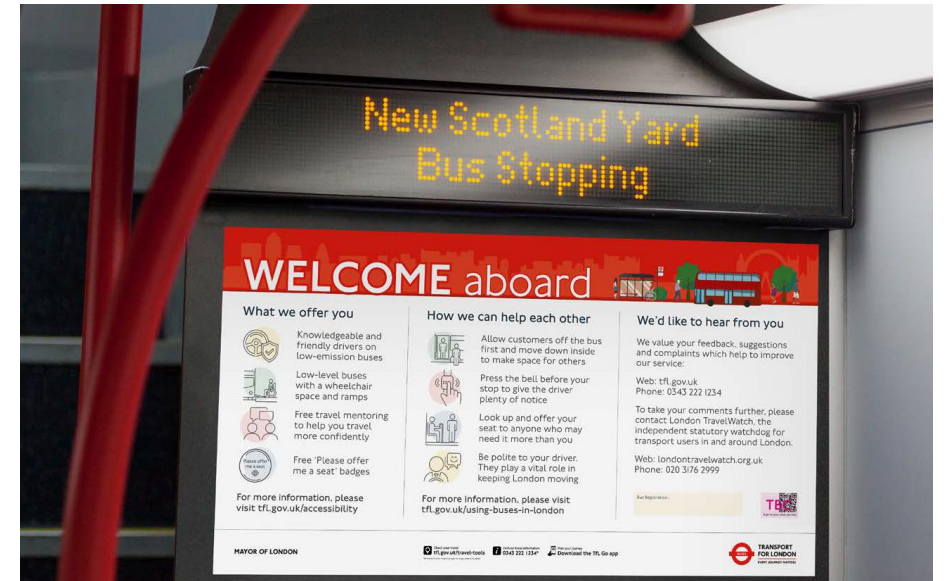
9. Encouraging more  
trips by foot and cycle

A number of initiatives are already having a positive impact

Here are some thoughts from London's bus drivers:



The *Keep London Moving* campaign shares bus drivers' best practices in their own words to inspire one another as customers return to the network



New bus signage to welcome customers aboard and provide more engaging customer information about travelling by bus and our accessible services – from October



An LU stations audit programme to ensure stations are clean and orderly



Return of all aspects of our Turn Up & Go service

# Working towards a better London



Londoners are telling us they want to live in a London for all.

Our actions will contribute to the economy, air quality, health, safety and equality.

*“It’s called Transport for London – it’s for us. So it needs to be for all Londoners”*



Making London an attractive place to live and work via infrastructure improvements, e.g. Elizabeth line, Northern Line Extension and bus electrification



Improving air quality and healthy outcomes via active travel, our environmental plan and Healthy Streets



Making London a safer place for everyone to live and work via Vision Zero, safety of women and girls



Making London a more equal and accessible place to live and work via inclusive infrastructure and information, affordable fares, community engagement and inclusivity built into customer service and decision making

# Summary

- Londoners are growing in confidence to travel in London due to the safety measures we have put in place, including:
  - Thorough cleaning
  - Enforcement of wearing face coverings
  - Reassurance messages
- Leisure journeys have been recovering strongly
- There is now a steady return of commuters as offices re-open
- Our communications campaigns are welcoming people back and reminding them about what they love about London to drive the city's recovery

