

Assisted Transport Services- Customer Research Findings

July 2022



Background to this work

- As part of the Assisted Transport Services (ATS) Roadmap we committed to undertaking research to better understand our customers
- The main focus of this research was to understand how customers use ATS and the wider public transport network
- Using this information we hope to be able to improve service provision for our customers - the Mayor's Transport Strategy (MTS) sets out TfL's vision to enable all Londoners to travel *'spontaneously and independently' (policy 14)*
- We want to ensure we are maximising the opportunities for people who wish to travel independently whilst supporting and developing essential Assisted Transport Services (ATS)
- Until now there has been little research to understand and support the respective needs and desires of our ATS customers



The current policy context

ATS form a key part in the success of a number of policies across TfL, London and the UK:

Policy	Objectives
Department for Transport (DfT) Inclusive Strategy 2021	<p>Our vision is for disabled people to have the same access to transport as everyone else. They will travel confidently, easily and without extra cost. By 2030 we envisage equal access for disabled people using the transport system, with assistance if physical infrastructure remains a barrier.</p>
Mayor's Transport Strategy 2018	<p>Aims to enable spontaneous and independent travel by all people in London. Improving ATS services is key to this deliverable as well as increasing support to enable customers to travel independently. The travel mentoring programme is key to this delivery. There is also the aspiration to make ATS World Leading. The action plan will support the Mayor's aim for 80 per cent of trips by foot, cycle or public transport by 2041</p>
TfL Equality Objectives	<p>Objective 1: Customer service - our approach to assisted transport</p> <ul style="list-style-type: none"> • Continue to deliver and build on the assisted transport vision and roadmap, working in partnership with London Councils and the London boroughs to enhance opportunities for spontaneous and independent travel and greater awareness of the range of travel options available for those Londoners who need additional help getting around London • Broaden the remit of the travel mentoring service to include active travel options such as walking, cycling and the use of mobility scooters, as well as all public transport modes including the Elizabeth line • Develop new partnerships between our travel mentoring team and health, social care and education professionals to promote independent travel support through travel mentoring provision • Work with London Councils and the London boroughs towards establishing greater consistency of the Taxicard offering across London

Increasing access to the public transport for disabled customers is vital for encouraging our customers back to our services and will ultimately improve the experience for all customers across London.



ATS Customer Action Plan

To help make ATS 'World Leading' the ATS team are working with City Planning and Customer Insight, Strategy and Experience (CISE) to develop a customer focused action plan.

This slide deck sets out results from our customer research which will form part of the evidence base for this plan.

We will also be engaging directly with stakeholders and customers to gather their input and feedback. We have started these conversations at the recent Inclusive Transport Forum.

The ATS customer action plan will aim to:

1. Ensure door-to-door ATS services reach those who need them most and who would find it difficult or impossible to use the wider public transport network or active travel
2. Encourage and support those ATS customers who are able to and wish to, to use the wider public transport network or active travel when they can
3. Ensure funding committed by TfL for ATS enables us to effectively and efficiently reach the customers who need our services most



Improving the current ATS offering

We have worked to address some of these issues through the ATS Roadmap, however, we now want to build a plan for the next steps.

Part of this will be developing an ATS Strategy and refreshed roadmap, to do this understanding our customers is key.

- **Offering is complex for customers to navigate**
 - Separate application, eligibility and booking channels for door-to door options
 - Taxicard offering varies by borough
- **ATS promotion lacking strategic vision**
 - Customer choice not always aligned with needs
 - Travel mentoring awareness is low
- **Service delivery fragmented**
 - Both within TfL and in the wider ATS market
 - Integration has been limited in the past, encouraging over-reliance on one or other of the door-to-door services (i.e. DaR, Taxicard, Travel Mentoring)
- **Capacity and scheduling is inefficient**
 - Dial-a-Ride booking system reliant on old technology
 - Dial-a-Ride operating locations based on legacy requirements



The aims of our customer research

The first stage was to carry out research on who the ATS customers are. The research had three core objectives:

1. **Understand our ATS customers** – current travel behaviour, demographics, attitudes and perceptions
2. **Customer insight**– highlighting potential to use public transport, active travel and Travel Mentoring
3. **Understand the level of desire for independent or multi-modal travel** – based on existing travel patterns and stated preferences

Opportunities this research could present:

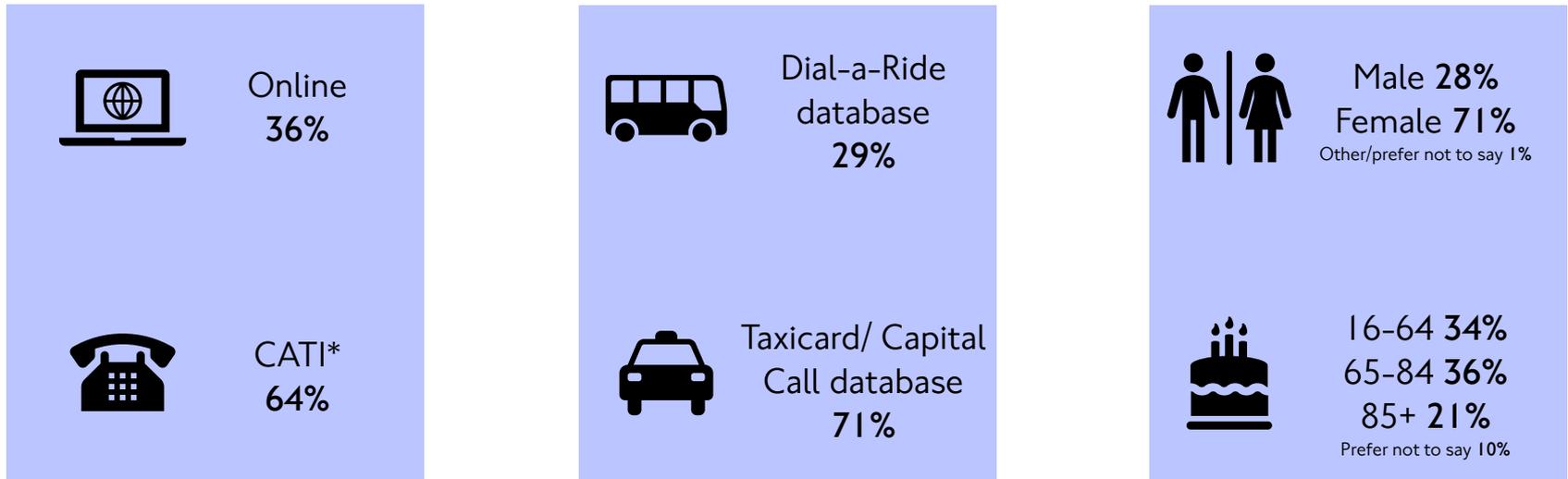
Clear understanding of ATS Customers and how we can best support them ensuring the service is 'World Leading' and that customers have the most travel options available as possible



Research sample size and background

We used established transport and customer survey methods to understand our ATS customers and gather insights on their travel patterns and preferences.

Total sample: 1509 respondents



Fieldwork dates: 7 April – 14 May 2021. Research carried out by 2CV

Sample taken from customers who registered or used Taxicard / Dial-a-Ride Since April 2019. This was to ensure customers could discuss their journeys pre-pandemic.

The size and demographics of the sample was determined to be representative.

* Computer Assisted Telephone Interviewing



Findings – understanding our ATS customers

Current travel patterns of ATS customers

- On average ATS customers are using 4 modes to make journeys
- Overall 93 % of people had travelled using ATS services in two years prior to the survey
 - 61 % use Taxicard / Capital Call
 - 13 % use Dial-a-Ride
 - 18 % use all of these services
- 68 % survey already use public transport
 - 63 % use London Buses
 - 34 % London Underground
 - 31 % London Overground, DLR, National Rail or TfL Rail
- 60 % use a private car as a passenger
- 60 % already travel by foot, assisted walking, mobility scooters or wheelchair (2 % by bike / adapted bike)



Findings – understanding our ATS customers

Specific findings

- Positive feedback for Dial-a-Ride with:
 - **78 %** of respondents confirming that staff would support them
 - **77 %** of customers appreciate that it takes them door to door
 - Though only **54 %** found it easy to book
- Taxicard is reported as feeling safe and offering flexibility that Dial-a-Ride doesn't for longer journeys and the ability hail without booking:
 - **76 %** of customers appreciate that it takes them door-to-door
 - Though only **57 %** found it easy to book
- The top barriers for customers for using active travel other than mobility issues include:
 - **32 %** finding it hard to take their belongings
 - **27 %** don't feel safe
 - **25 %** feel it isn't as flexible as other modes
- Accessibility is cited as the key barrier for using public transport more so on London Underground than buses (**60 %** London Underground and **42 %** buses)
- The second biggest barrier that public transport doesn't take customers directly to their door (**39 %** London Underground and **43 %** buses)



Findings – understanding our ATS customers

Interest in travelling independently

There is a significant appetite amongst ATS customers to use public transport and active travel modes:

- **Over half of customers (52 %)** are open to increasing the number of journeys by public transport
 - This group of customers are also significantly more interested in using Travel Mentoring services than those who did not express an interest in increasing their use of public transport
 - **42 %** of these customers had used public transport in the last two years and wanted to make more public transport journeys
 - **7 %** had not used public transport in the past two years but wanted to change this
 - A key driver for wanting to make more public transport journeys was the convenience and time savings it would provide compare to using ATS services
- **47 %** of those surveyed are open to increasing the number of journeys by active travel
 - **34 %** had made journeys by active travel in the past two years and wanted to increase this
 - **13 %** had not made an active travel journey in the past two years but wanted to change this
- **32 %** were open to both using public transport and active travel journey options

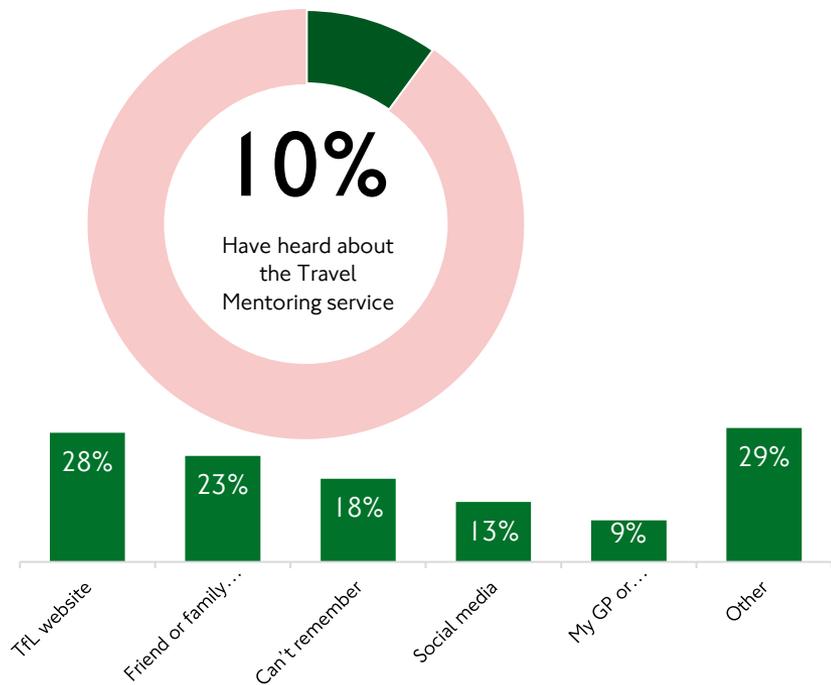


Findings - understanding our ATS customers

Travel Mentoring

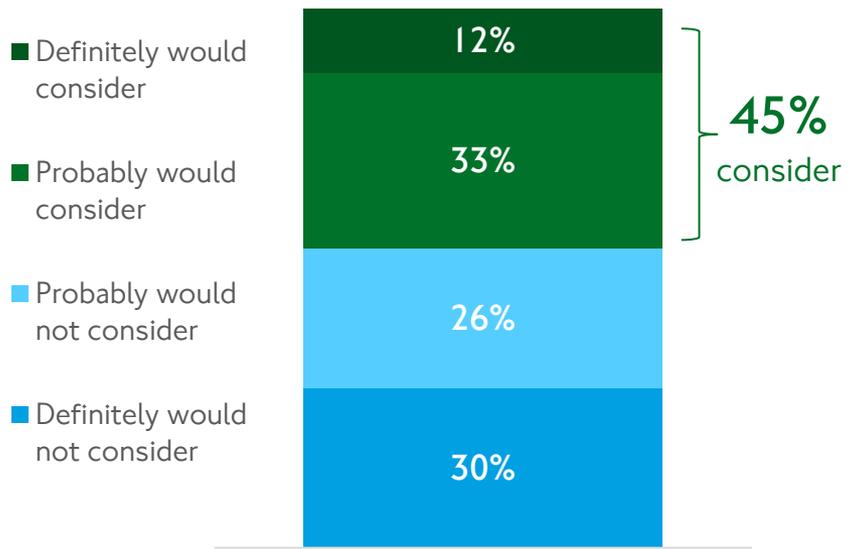
There is a large opportunity to support customers in making more public transport and active travel journeys. Only **10 %** of the audience had heard of the Travel Mentoring Programme, however, **45 %** would consider using it.

Awareness of the Travel Mentoring service | Total



Mostly via the TfL website, family/ friends, and some from ATS services or TfL staff

Consideration of the Travel Mentoring service | Those who have not used it before



Customer Insights

Based on the research, three broad customer groups have been identified. Actions and initiatives for the Customer Action Plan will be focused around these.

Customer Groups	Description	Aim
Potential wider public transport network users	People who currently use ATS and who express an interest in using the wider public transport network or active travel modes	Guide, support and enable these customers to maximise their ability to use the wider public transport network and active travel modes
ATS users	People who are likely to continue to use ATS as they are unable or don't wish to to use the wider public transport network or active travel modes	Maximise the availability of our ATS services to meet their aspirations for travel and prioritise our services towards this group – so that we are focusing our services on those who need them most
Current non-users	People who don't currently use either ATS or the wider public transport network or active travel	Guide and support these customers to give them full awareness of the services we offer, and to support them to feel more confident and empowered to travel



Identifying the focus for our Customer Action Plan

Informed by the research undertaken by 2CV, **three pillars** have been identified to help guide us in achieving our aims for the ATS Customer Action Plan.

Listen and coach	Enable	Learn & Improve
Using customer insights we will listen and understand peoples’ individual needs, and coach them how to access and use their preferred forms of transport	Provide the help customers need to understand the wider public transport system, active travel or ATS to enable them to travel with confidence	Seek feedback from customers so that we can further improve the wider public transport network, active travel or ATS to ensure they are accessible and inclusive

Workshops have been held with colleagues from London Councils, Customer Experience (CISE), City Planning, ATS Team, D & I team to start developing a range of potential initiatives under each of the three pillars.

The workshops have formed the long list of potential measures. Our next step is to engage with our customers and stakeholders to get their input and ideas before shortlisting the measures and creating a short, medium and long term Customer Action Plan as part of a refreshed ATS Strategy and Roadmap.

We have started engagement at the Inclusive Transport Forum.



Next Steps

We plan to report back to CSOPP with an update on activities in December 2022.

Actions:

- Best Practice Review – what is happening in UK, Europe and World Wide that we can learn from
- Carry out external engagement with stakeholders and customers on the proposed Customer Action Plan as part of developing a refreshed ATS Strategy – ongoing engagement and updates through forums such as the Inclusive Transport Forum
- Prioritise long list of potential options working with stakeholders and inline with the funding agreement
- Finalise budgets and resourcing
- Incorporate agreed actions into the refreshed ATS Roadmap for tracking
- Further internal engagement
- Final internal sign off



Appendices



What are Assisted Transport Services?



Dial-a-Ride



Travel Mentoring



Taxicard



Capital Call



Assisted Transport Facts and Figures

	2019/20	2021/22
Total number of ATS members	90,700	95,156
Total number of DAR members	32,211	35,793*
Number of DAR journeys per annum	1 million	375,045
Total number of Taxicard members	57,128	58,078
Number of Taxicard journeys per annum	915,469	770,751
Total number of Capital Call members	1,361	1,285
Number of Capital Call journeys per annum	5,044	3,100



*No customer deactivation exercise was undertaken in 2021/22 due to the pandemic so the DAR member figure is higher than expected - usually an exercise is undertaken once a year to remove customers from the system who have not travelled in the past five years



Customer Journey Overview

