

# Victoria station upgrade research

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Research conducted by SPA Future Thinking

# Executive summary

This paper summarises and discusses customer research conducted on behalf of the Victoria Underground station upgrade project team to investigate the profile of customers using ticket issuing facilities at the station.

The research was required because modelling has forecast that changes to the station during upgrade works, necessary for health and safety reasons and to comply with fire evacuation procedures, are likely to generate substantial congestion at the station which could necessitate temporary station closures which have significant disbenefits for customers.

In conjunction with substantial input from the project team, the research has generated recommendations on how to reduce demand in the Victoria line ticket hall during the upgrade works, which are due to start after the Olympic and Paralympic Games in 2012 and are scheduled to be completed in Winter 2018.

In order to develop effective solutions there are a number of challenges which need consideration:

- ➔ Many customers, particularly those from outside of London, lack confidence with using the London transport network and will seek assistance in person to confirm or complete their ticket purchase. Any solution must tackle this, or it is likely that customers will not change their behaviour but continue to seek to purchase tickets at Victoria Underground station
- ➔ There is relatively low awareness of alternative ticket purchase channels, again particularly for customers arriving from outside London. If customers are to be encouraged to purchase their tickets before arriving at Victoria, there must be wider awareness of the options
- ➔ Customers tend to travel without a high degree of pro-active conscious involvement, taking the easy option even if this means they will queue for longer, so any behaviour change initiative must generate sufficient cut-through to engage customers

The recommendations discussed in this paper, if implemented in full, are estimated to lead to a demand reduction of up to 30%, however this is contingent upon substantial resource allocation. The four target groups identified through the research are:

- ➔ Customers travelling to Victoria Underground station by coach, who make up 26% of those queuing at the Victoria line ticket hall
- ➔ Customers arriving by train from Gatwick airport, making up 17% of the queue
- ➔ Customers arriving from all other train stations, who make up 22% of the queue

- Commuters, who make up 14% of the queue<sup>1</sup>

Specific recommendations are found in this report however, there are a number of themes which will need to address for all suggested initiatives or measures:

- Alternative ticket purchase facilities must be made available for customers
- It is likely that partnerships will need to be formed with third parties such as train operating companies
- Publicity and posters will need to advertise that the initiative has been put in place and act as a call to action
- Initiatives must include an element which reassures customers and enables them to self-serve with confidence

Additional work is currently underway to predict what level of demand reduction will be required to mitigate the risk of widespread disruption at Victoria during the upgrade works, and this paper should be considered in conjunction with that report and any other available knowledge.

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<sup>1</sup> It is likely that throughout the whole day, the demand from commuters is greater as the research did not cover the afternoon peak period due to the escalator works in progress at the time.

# Background, objectives and method

## Background

Major upgrade works are planned at Victoria Underground station, commencing after the Olympic and Paralympic Games next year. These works will necessitate the closure of the Wilton Street stairwell, which leads in to the Victoria line ticket hall, for the duration of the upgrade works. Three Passenger Operated Machines (POMs) which are located in the vicinity of the Wilton Street stairwell will need to be removed from service during these works.

In order to comply with station evacuation procedures and fire safety regulations, the Sussex staircase (which also serves the Victoria line ticket hall) will be widened in order to make up for the lost staircase capacity caused by removing the Wilton Street access point.

This change is likely to have two effects. Firstly, it will bring an increased flow of passengers into the Victoria line ticket hall area at the bottom of the Sussex staircase – an area which already becomes congested at times. Secondly, the removal of POMs in the Wilton Street staircase will increase demand at the main Victoria line ticket issuing facilities, further increasing congestion.

Together, these effects may cause increased conflict in passenger flows which could cause a rise in the frequency of temporary station closures at peak times – this is an unacceptable outcome for London Underground (LU) and customers, particularly considering that the upgrade works will take place over five years.

## Objectives

In order to develop and implement an effective Interim Station Arrangement (ISA), customer research has been conducted to provide data on customer ticketing demand and behaviour. This complements on-going ticketing analysis carried out by LU by revealing further information about the demographics, motivations and origin points of those purchasing tickets or accessing information at the Victoria line ticket hall.

In particular the customer data have added to our understanding of the profile of those purchasing tickets or making enquiries at the Victoria line ticket hall (both Ticket issuing Windows (TiWs) and POMs) in terms of their:

- Point of origin
- Mode of arrival

- Journey purpose
- Reasons for using the ticket issuing facilities
- Awareness of alternative ticket purchase facilities
- Barriers to using alternatives

Combining data from the customer research, ticket sales analysis, and substantial input from the Victoria station upgrade project team, a number of recommendations have been generated on how customers may be encouraged to purchase tickets before arriving at Victoria, thus easing congestion. These are discussed in this report.

## Method

The research was conducted between Friday 2<sup>nd</sup> September and Saturday 10<sup>th</sup> September inclusive. Interviews were conducted between 7am and 4pm, at which time, due to on-going escalator upgrade works, ticket issuing ceased at Victoria until 8pm.

A total of 1,110 customers were interviewed as they queued at the TiWs and POMs in the Victoria line ticket hall.

It is important to note that, as research took place only amongst those who were using the ticket issuing facilities, the findings in this paper do not reflect the general Victoria Underground station customer profile. Indeed, those buying tickets account for just 12% of station entrants<sup>2</sup>.

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<sup>2</sup> See separate analysis conducted by LU “Victoria Station Ticketing Sales Analysis”

# Main findings

## Customer profile

This section examines the profile of those using the ticket issuing facilities at the Victoria, and outlines the challenges in encouraging customers to make use of alternative ticket issuing and information services.

The profile of customers queuing at the Victoria line ticket hall is quite different compared with the general profile of Victoria Underground station users. For example, while 37% of those arriving at Victoria do so on foot, just 14% of those in the queue arrived in this way (see table below).

This has important implications when considering initiatives to reduce congestion at Victoria as it shows certain groups are much more likely to seek assistance or tickets at the station.

### Mode of transport to Victoria

	Survey data (1,110)	Operational data
Train	39%	48%
Coach	26%	5%
Bus	10%	37%
Walking	14%	10%
Tube / Other	11%	

### Profile of queuing customers

A quarter of those queuing in the Victoria line ticket hall are Londoners, with a further 45% living somewhere else in the UK, and 29% being overseas visitors.

The majority (70%) are travelling for leisure rather than work reasons; just 14% are commuters, which proportionately is substantially lower than the overall profile of Victoria Underground station users<sup>3</sup>. Amongst Londoners the proportion travelling for leisure is lower at 52%, while for those from overseas 87% are travelling for leisure reasons.

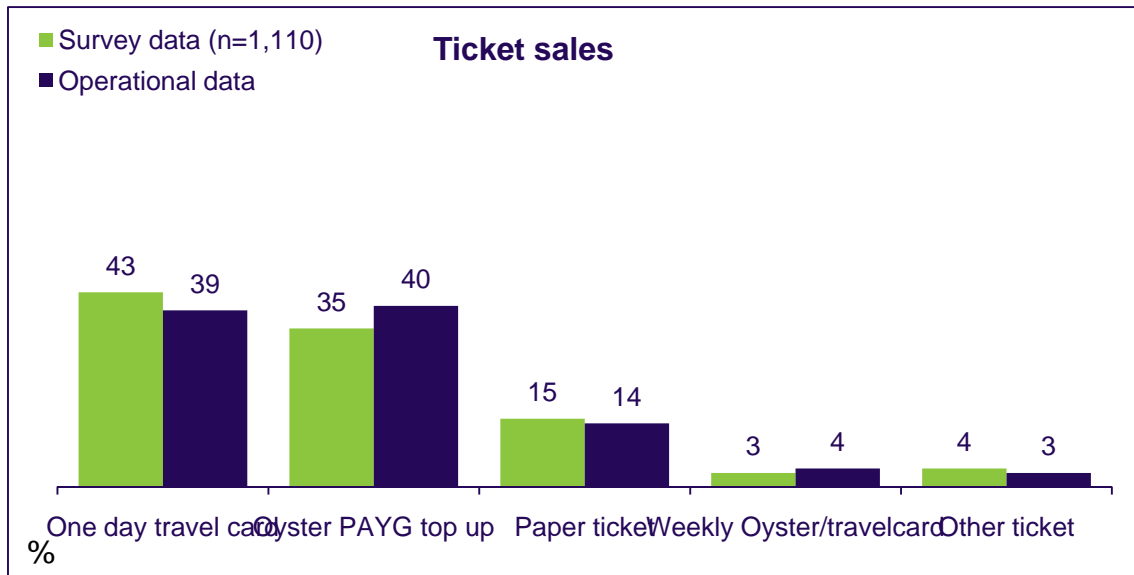
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<sup>3</sup> As previously noted, the proportion of commuters interviewed may be lower than all those in need of ticket purchasing/information throughout the whole day due to the need to stop interviewing at 4pm.

## Ticket purchases

The main ticket purchase requirements at Victoria are One Day Travelcards (ODTCs) and Oyster pre-pay credit. This is confirmed by LU internal on-going analysis of tickets purchases, as shown in the figure below.

### Ticket sales at Victoria during fieldwork period



*NB: Operational data are from the same period as the fieldwork*

The close comparison of survey data with operational figures gives us confidence that the research is a good representation of the overall profile of those using the ticket issuing facilities in the Victoria line ticket hall.

## Challenges

Whatever interventions are utilised to reduce the demand for tickets or service at Victoria Underground station will need to be designed with due consideration to a number of challenges which the research identified in encouraging customers to purchase their tickets elsewhere.

### *Lack of confidence in ticket types and POMs*

The research found that queuing customers had relatively low confidence in their knowledge of the different ticket types available, and in their ability to use the POMs effectively.

As would be expected, non-Londoners show the lowest confidence in these areas due to their lower familiarity with, and experience of, the system. 93% of those from overseas use Victoria station less than once a month, and for 25%, they were using the station for the first time when they were interviewed.



For those from the UK but outside of London, experience of the network is slightly higher – 28% use Victoria at least once a month – but the majority are irregular users, and 5% had never been to Victoria before.

Many of those using the TiWs (43%) were doing so because they wished to ask a question, either relating to their ticket, for directions or more generally.

This is important as it shows that any actions LU takes to encourage ticket purchase elsewhere must take into account the fact that many customers will need guidance and reassurance in order to have the confidence to make purchases. Should this not be provided, it is unlikely that these customers will be encouraged to purchase before arriving at Victoria, and they will therefore continue to add to the congestion in the Victoria line ticket hall area.

### ***Lack of awareness of alternative ticket purchase options***

Although Londoners are generally aware that they can purchase tickets at alternative locations, a large proportion of those from elsewhere in the UK and overseas do not know what options are available. Indeed, less than half of those from elsewhere in the UK, and only around a quarter of overseas customers are aware that tickets can be purchased at newsagents, National Rail stations or online – and these are the channels which have the highest awareness (see table below).

#### **Awareness of alternative ticket purchase channels**

	Londoners (n=286)	Elsewhere in UK (n=500)	Overseas (n=322)
Newsagents / shops	85%	42%	27%
National Rail stations	62%	43%	25%
On the internet	49%	41%	29%
Travel Information Centre	26%	22%	14%
District Line ticket office	18%	10%	5%
Airports	14%	6%	8%
Telephone	13%	9%	3%
Some National Rail trains	13%	8%	3%
On some coaches	10%	6%	2%
On some airlines	10%	4%	4%
None	5%	30%	45%

If customers are to be encouraged to purchase their tickets prior to arriving at Victoria Underground station, work must take place to raise awareness of the possibility that tickets can be purchased elsewhere.

There is a belief amongst some customers that third party ticket suppliers will add a mark up to the price, and that making their purchase from a London

Underground station will therefore offer them the best value; this too will also need to be challenged.

### ***Customers tend to want to travel without making too many decisions***

Even for those with the awareness and confidence to purchase their tickets without much support or reassurance in advance of travelling, research has shown that customers tend not to make detailed travel plans for journeys on the LU network compared with other forms of travel (for example, advance purchase of air travel tickets, or the planning of an unfamiliar car journey). In this study, for example, it was found that when asked why they were queuing at the TiWs rather than the POMs, 22% of customers could offer no explanation of their behaviour – the second highest single response.

This way of travelling is likely to result from a variety of factors including the comparative simplicity of travelling on public transport in London, the frequency of services, the relatively low cost and, amongst some groups, their familiarity with the network. With regard to encouraging customers to purchase tickets before arriving at Victoria, the challenge will be to break through the subconscious mode of travel to induce behaviour change amongst customers.

For Londoners the situation may be different than for those from elsewhere. Londoners are more likely to be familiar with ticket purchasing, and with alternative purchase channels, so for these the main challenge is to encourage them to change behaviour.

On the other hand for customers from elsewhere, with limited knowledge of alternative means, one of the primary challenges will be to raise awareness of other methods.

### ***Summary***

Whichever initiatives are put in place to encourage customers to purchase their tickets outside Victoria Underground station, a number of key factors must be borne in mind:

- ➔ Many customers have a low understanding of ticket types, and lack confidence in using ticket machines
  - Linked with this, many customers want to speak to someone official about their ticket and require knowledgeable support to provide confidence for their ticket purchase
- ➔ There is low awareness of alternative purchase channels, particularly from those outside of London

- Customers tend to travel without much pro-active conscious involvement and this means that any initiatives to encourage ticket purchase elsewhere must cut through this mind-set

## Targetting groups of customers

When looking at which groups would be most effective to target, we have identified groups which contain a large number of customers who arrived at Victoria from either a single origin point or via a particular transport operator.

Looking at customers from different parts of the world, there are clear patterns which enable us to identify suitable targets for behaviour change action, with overseas customers most likely to arrive by train (and a large proportion of those entering the country via Gatwick airport), while those from elsewhere in the UK are most likely to arrive by coach, with a further third coming by train.

### Mode of transport to Victoria Underground station

	Londoners (n=286)	Elsewhere in UK (n=500)	Overseas (n=322)
Train	33%	36%	48%
Coach	8%	48%	10%
Walking	14%	6%	25%
Bus	20%	6%	7%
Tube	20%	3%	10%

There are patterns within these figures which contribute further to the analysis of which groups to target:

- Customers who had travelled to Victoria with National Express coaches made up 17% of the queue
- 17% of the total queue was made up of people who arrived by train from Gatwick airport
- Commuters make up 14% of the queue
- 22% of the queue was made up of customers arriving by train (excluding Gatwick)

In total, removing any overlap, the groups identified above contribute 72% of the total queue, and if their behaviour can be changed in large numbers then there is likely to be considerably less congestion at the Victoria line ticket hall.

The number of customers whose behaviour LU will be able to change will depend on the nature and scale of any initiatives which are implemented. This,

along with various means of approaching the task, are discussed over the following pages.

## General recommendations

We have made some very specific recommendations for targeting different customer groups. However there are some over-arching points which should be borne in mind whichever initiatives are implemented.

- Customers must be aware of the mitigation processes that you put in place in order to be able to act on them. Publicity and promotion need to generate sufficient cut-through to engage with customers that are in a travelling mindset
- LU must provide alternative ticket purchase channels which meet the needs of customers. For example if LU seeks to encourage ticket sales at National Rail stations, then appropriate facilities must be provided
- It is likely that initiatives will involve partnership with other organisations (eg National Express, Gatwick Airport Limited, Southern trains). As well as forming productive alliances with organisations, it is vital to gain the support of the front-line staff who will be delivering on the initiatives (eg Rail ticket window staff, National Express coach drivers etc)
- In addition to providing ticket purchase facilities, customers must be able to access the information and support they need to be confident making ticket purchases or enquiries away from Victoria

During the fieldwork period, c.66,500 tickets were sold at the Victoria line ticket hall during interviewing times (7am – 4pm Monday to Sunday). When grossed up to an annual estimate, this would equate to around 2.6m tickets being issued per year.

For each of the recommendations below, we have estimated the number of customers who may be removed from the queue if initiatives are put in place. As there will be considerable variation depending on factors such as the extent to which initiatives are supported, or cross-over with other initiatives, we have provided a range of impact (eg if LU implements recommendation x, the number of customers likely to be affected is between y and z). These ranges are discussed in the text of this document, and summarised in the appendix.

The numbers provided are estimates based on the experience of the research agency and interpretation of the findings, and should be used in conjunction with any other data available relating to similar initiatives which have been used, and any other pertinent data. To be clear, the estimates have not come about as a result of data modelling or advanced analytic techniques and should not be treated as such. They are included to provide a sense check and possible additional context to each recommendation.

# Targeting coach arrivals

## *Context*

As we have seen coach arrivals make up a quarter of the queue in the Victoria line ticket hall, and as such they are a key target. During the busiest time in the morning (9am – 11am), this rises to 34% of the queue, so encouraging this group to purchase their tickets before arriving at Victoria could have a substantial impact on congestion levels at the station during the upgrade works.

National Express and Megabus account for 81% of the coach arrivals to Victoria, with National Express carrying 64% of all those arriving by coach, and Megabus contributing 17%, and therefore any partnership initiative would benefit from the involvement of these operators.

Anecdotal evidence suggests a high volume of leisure customers arrive by coach and this is supported by the research findings: 78% of those interviewed were travelling for leisure purposes.

The most commonly purchased tickets by those arriving at Victoria Underground station by coach are One Day Travelcards (accounting for half of all tickets requested), and single/returns (14%).

Low confidence with the network and ticket types is a pertinent issue with this group of customers: only a quarter said they were “very confident” with the different tickets available for travel on the London Underground, and three quarters of those queuing at a TiW either said that their request could not have been dealt with by a ticket machine, or that they specifically wanted to speak to a member of staff (either about their ticket or something else).

## *Pre-travel ticket sales*

The first place that customers who travel to Victoria by coach can be targeted is before they set off on their journey. 89% of National Express passengers (and 98% of Megabus customers) purchase their coach tickets online, and this presents an opportunity to combine coach ticket sales with travel on the TfL network.

However, neither National Express nor Megabus issue paper tickets to customers purchasing their tickets online: both either produce a print-out voucher, or provide customers with a reference number which acts as their ticket. With no need to wait to receive a ticket through the post, coach customers may purchase their tickets at short notice before travel.

LU issues physical tickets – either with a magnetic strip or Oyster – which are not printable by customers.

Therefore it will not be possible simply to 'add LU travel' to a customer's coach ticket purchase and alternatives must be considered including:

- Coach operators linking to TfL website for LU ticket purchase
- Advertising on coach operators' websites to encourage ticket purchase prior to arriving in Victoria
- Producing a printable ticket voucher which could be issued by coach operators and accepted on LU

### *On board coaches*

It is possible to target coach customers while they are on board with promotional messages or advertising. This could involve coach drivers making announcements (either personally or pre-recorded), or through advertising on board (a flyer, poster or other comms). Drivers could also sell LU tickets, however this would be likely to involve considerable training and a high level of partnership with operators.

Taking pre-travel and on-board initiatives together, 17% of those queuing at Victoria Underground station could be targeted. Of these we have estimated that between 5% and 30% could be persuaded to purchase their LU ticket prior to arriving at Victoria Underground station. Grossing up the figures to a year's worth of ticket sales, this ranges between c24,000 and c148,000 customers removed from the Victoria line ticket hall queues.

The variation would be affected by the extent to which partnership with operators is possible in terms of:

- Website adaptations
- Advertising
- On-board announcements
- Coach driver ticket sales

If significant partnership can be secured, particularly in relation to website adaptations which allow the sale or promotion of LU tickets, then we would envisage the percentage change to be towards the higher end of the spectrum, while if arrangements are limited to on-board announcements the number of customers who may be reached would be substantially lower.

## *At Victoria Coach Station*

Although not all coach arrivals pass through VCS, there is an opportunity to intercept those who do to ease demand at Victoria Underground station through the provision of a ticket issuing facility at the station.

Given the low confidence that many customers have with ticket purchasing, this would need to be a staffed facility so that customers could ask questions and confirm which tickets they needed to purchase.

In order for this to be an effective means of reducing demand the ticket issuing facility would need to be:

- Sited in an area of high footfall
  - Customers are unlikely to go back on themselves to purchase an LU ticket when they think they can get one at the Underground station anyway
- Able to dispense large volumes of tickets
  - During the nine day fieldwork period, 17,000 tickets were issued at Victoria Underground station to customers who had travelled there by coach
  - If there were even a small queue at the facility, customers would probably be inclined to try to get their tickets at Victoria Underground station instead

We have estimated that installing a ticket issuing facility at VCS could have an impact on between 7% and 25% of those arriving at Victoria by coach, depending on factors including:

- Size and opening hours
- Whether the facility would be staffed
- Precise location

In terms of customer numbers, these estimates would equate to between 47,000 and 169,000 fewer customers queuing at Victoria line ticket hall in a year.



## ***Between the coach and Victoria Underground station***

Presently there are few Oyster Ticket Stops between the drop-off points for coaches arriving at Victoria and the Underground station, particularly along Buckingham Palace Road.

If more Ticket Stops could be established, and with significant promotion of these (potentially including partnership with coach operators) then we have estimated between 2% and 10% of coach arrivals may purchase their tickets through this channel (equal to between 13,000 and 67,000 people per year).

## **Targeting Gatwick airport arrivals**

### ***Context***

Arrivals from Gatwick airport make up 17% of the queue at the Victoria line ticket hall, rising to 27% of the queue during inter-peak hours (10am – 4pm).

The majority of those arriving from Gatwick airport are from overseas (72%), and only 9% are Londoners (the remaining 19% are from elsewhere in the UK). Overseas visitors come from a wide variety of countries and language groups; the largest single language spoken by overseas visitors is English, with 40% coming from a country which has English as its first language (USA, Australia etc).

Overseas customers are least likely to be confident with ticket types or with using POMs, and are therefore much more likely to require assistance from a staff member than Londoners – indeed, of those arriving from Gatwick airport, 29% of Londoners were interviewed at a TiW compared with 60% of overseas customers. Assistance in person will therefore be important in enabling this group to purchase their ticket prior to arriving at Victoria.

The most commonly purchased tickets by arrivals from Gatwick airport are ODTs (43%) and single/return tickets (23%); only 19% are topping up Oyster PAYG.

### ***Partnership with Easyjet/British Airways (BA)***

Of those who arrived at Victoria from Gatwick airport, 29% flew on Easyjet and a further 16% with BA, totalling 45% of all queuing customers at Victoria. Partnership with these airlines could therefore provide an avenue to encourage ticket purchase before or during travel to Victoria.

It is currently possible for customers to purchase LU tickets on Easyjet, and one initial action may be to investigate the effectiveness of this channel.



The likely impact of closer working with airlines would depend on the extent to which they will support the initiative. We have estimated that with a small push to encourage greater volumes of ticket sales it may be possible to encourage 5% to purchase their tickets on board (equivalent to around 10,000 customers per year). If there is greater collaboration, potentially including links or promotional material on BA / Easyjet websites, promotional material included in an in-flight magazine, and greater push for sales from cabin crew, then this may rise to around 20%, or c41,000 customers per year.

## *At Gatwick airport*

Two thirds of Gatwick arrivals in the queue bought their ticket to Victoria at Gatwick, either from a ticket window (45%) or ticket machine (21%). There is therefore an opportunity to include LU travel within customers' train ticket purchases.

There are various ways in which LU could encourage further ticket sales at Gatwick airport, including:

- ➔ Utilisation of the ticket window in air-side baggage reclaim
  - Though anecdotal evidence suggests that this is under-used, meaning that it is rarely open
  - Also involves operational difficulties arising from the need for staff to undergo additional security checks to work air-side
- ➔ LU staff working at a ticket window at Gatwick airport rail station
  - Likely to require substantial investment as well as agreement of Southern for the use of the space
  - Raises the question of whether customers would 'queue twice' at Gatwick, once for their rail ticket and then for LU travel
- ➔ Encouragement of Gatwick airport rail staff to sell LU tickets
  - Again would require partnership with Southern
  - Training / incentivisation of ticket issuing staff to be motivated and able to offer the advice that customers need to feel reassured they are buying the right ticket
- ➔ Integration of LU ticket issuing facilities into ticket machines already in use at Gatwick
  - Would require a technical solution and need to provide sufficient assistance to ensure customers don't revert to purchasing at Victoria
  - And requires co-operation with Southern
  - The option to buy LU tickets should be as obvious as possible for customers
- ➔ Installation of LU POMs at Gatwick airport

- Does not address the need for assistance in person for those unsure which ticket to purchase, or how to use the POM unless they are staffed
  - And may also require customers to queue twice if the machines cannot issue train tickets to Victoria
- Advertising at Gatwick promoting ticket purchase before boarding a train to Victoria
- Would need to generate sufficient cut-through to make a meaningful difference to the queue at Victoria

Many of these measures could be introduced independently of each other or in combination. We have estimated that between 5% and 40% of customers could be encouraged to purchase their tickets at Gatwick airport on the basis of:

- 5%: POMs installed at Gatwick but little promotion or partnership with Southern
- 40%: substantial push including training ticket issuing staff at Gatwick to sell LU tickets, advertising at the airport, ticket machine adaptations to sell LU tickets, potentially even LU staff providing assistance to customers at ticket machines

There is also the possibility to partner with Southern to sell LU tickets on train services running from Gatwick airport to Victoria. It is understood that discussions have already take place with Southern on this issue and that there are issues with the amount of time this would take and whether staff would be able to inspect all tickets if they were also required to sell LU travel tickets. The possibility of partnering more closely with Southern more generally is discussed below.

## Targeting commuters

### *Context*

People travelling to or from work make up 14% of the total queue at the Victoria line ticket hall, rising to 30% during the morning peak (7am – 10am), and 20% during the particularly busy period between 9am and 11am.

42% got to Victoria by train before they were interviewed, although a higher than average proportion of this group joins the queue after getting off the Underground (19%). There is no one common train origin point, but 45% arrive on Southern, 22% on South East and 18% on the Gatwick Express (either from Gatwick or connecting from another station).

Half of commuters (48%) are topping up an Oyster PAYG, and this group are much more likely to have an Oystercard than the average (77% do, compared with 49% of the total sample).

As this group is already familiar with both the LU network and Victoria station, and are more confident with ticket types and use of POMs; they are also much more likely to be aware of alternative purchase points, particularly newsagents, Ticket Stops and National Rail stations.

There are fewer barriers to overcome with this group than with others in terms of encouraging behaviour change, and the two biggest issues will be addressing the tendency of customers not to plan their ticketing arrangements before travelling, and ensuring adequate provision of alternatives.

### ***Providing information***

As regular users of Victoria Underground station and the LU network in general, there is an opportunity to communicate with commuters both prior to and during the upgrade works to encourage and remind them that ticket purchases can and should be made prior to arriving at Victoria.

Such activity could include:

- ➔ Posters and announcements at Victoria Underground station, across the network and off-system
- ➔ Promotional materials on POMs and at TiWs advertising alternative ticket purchase channels and elsewhere in stations and on trains
- ➔ Information on the TfL website / via email to registered Oyster users
- ➔ If practical, information provided through social media

### ***Providing alternatives***

Alongside providing information to prepare and advise customers on alternative ticket purchase options, provision could be expanded to give higher coverage including:

- ➔ Heavily increasing the number of Oyster Ticket Stops in the Victoria area
- ➔ Providing POMs / Oyster top up facilities at National Rail stations, or extending functionality of National Rail ticket machines

Following discussions with the Victoria station upgrade team it appears unlikely that it would be possible to provide further ticket issuing facilities at Victoria National Rail station.

It is likely that commuters will adapt quickly to new arrangements at Victoria and that if capacity and overcrowding are serious issues then we have estimated around 60% - equating to around 218,000 customers per year – will make their ticket purchases outside of Victoria Underground station, even if very little effort is made to change their behaviour. If many of the measures discussed above are implemented, that could rise to 90%, or around 328,000 per year.

## Targeting arrivals from rail stations other than Gatwick airport

### *Context*

People arriving by train, from stations other than Gatwick (henceforth termed 'other rail arrivals') account for 22% of those queuing at the Victoria line ticket hall. 61% travelled with Southern, and a further 19% with South East<sup>4</sup>.

Brighton is the most common origin point for rail arrivals from stations other than Gatwick, making up 4% of the entire queue, and 18% of all other rail arrivals. 8% of other rail arrivals boarded the train at Clapham Junction, 7% at East Croydon and the rest are dispersed across the network.

The majority are travelling for leisure reasons, particularly from Brighton where 70% are leisure customers, and ODTCs and single/return tickets are the most commonly purchased by this group overall.

For those travelling from Brighton, 43% bought their ticket to Victoria from a ticket window at Brighton (9% from a ticket machine), and for those from other stations, 62% bought their ticket to Victoria at either a window or machine at their station of origin.

This group is relatively knowledgeable with ticket types and with the use of POMs, and are unlikely to be overly reliant on assistance in person to enable them to self-serve.

### *Partnership with Southern*

Given that Southern is the TOC which brings the largest percentage of customers to the ticket lines at Victoria Underground station, it would be most fruitful to partner with Southern to encourage and enable customers to purchase tickets prior to arriving at Victoria.

The nature of any partnership will depend on discussions with Southern but there is a mutual benefit in attempting to work together to reduce demand at Victoria Underground station as Southern's passengers would appreciate the

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<sup>4</sup> The majority of the remainder weren't sure which operator they used.

optimum functioning of Victoria for their onward connections, and LU would gain by potentially being able to avoid station closures caused by over-crowding.

Partnership ideas could include:

- Training Southern ticket sales staff (at station and on-board) to sell and be able to explain the different LU tickets (or just ODTCs as an initial step)
- Integration of LU tickets into Southern`s ticket machines which are situated on routes that feed Victoria, and featuring this functionality prominent
- Southern staff providing information to customers about the upgrade works and the fact that it will be easier to purchase tickets in advance
- Advertising on Southern trains regarding the upgrade works and alternative ticket purchase facilities

Although most other customers arriving by train bought their ticket to Victoria at their origin station, 27% did so online – a partnership with [nationalrail.co.uk](http://nationalrail.co.uk) and/or [thetrainline.co.uk](http://thetrainline.co.uk) could also reduce demand at Victoria Underground station.

The effectiveness of any partnership with Southern will depend on the success of negotiations to secure cooperation. We have estimated that if a small degree of partnership is formulated, then up to 5% more Southern passengers may purchase their LU tickets before arriving at Victoria compared with current levels, equating to c.28,000 customers per year. If significant partnership can be obtained including a big push for window and onboard sales, and a high level of publicity on train and at stations, this may increase to 35%, or around 200,000 customers per year.

## Summary

Altogether, removing any overlap, we estimate that if the measures set out above are implemented in full, this could lead to a 30% drop in demand at the Victoria line ticket hall, however this will require considerable investment of time and other resources.

Other work is currently being undertaken to investigate what level of demand reduction will be needed in order to mitigate the risk of widespread and ongoing disruption to services at Victoria during the upgrade works. This document should be reviewed in conjunction with that work, and other available knowledge, to ensure appropriate resourcing of mitigation initiatives.

# Appendix

## Summary of recommendations and estimated impact

		Proportion of queue	Estimated per cent change	Number of people (based on 2.6m ticket sales at Victoria POMs and TOMs using week of fieldwork as best estimate)
National Express and Megabus sales	Low (link on the website, low engagement)	19%	5%	24,700
	High (integrated sales, on coach announcements, website link, advertising, high engagement)		30%	148,200
VCS staffed window	Low (no promotion)	26%	7%	47,320
	High (announcements on all coaches, advertising, staff at coach station offering assistance)		25%	169,000
Intercept between VCS and Victoria Underground station	Low (a few posters advertising Ticket Stops)	26%	2%	13,520
	High (large increase in the number of Ticket Stops, heavy promotion, partnership with coach operators)		10%	67,600
BA/Easyjet partnership	Low (no announcements just more push)	8%	5%	10,400
	High (with announcements, website link etc)		20%	41,600
Ticket window at LGW	Low (NR staff, some posters, little push)	8%	10%	20,800
	High (trained LU staff, posters in very prominent positions, and big push)		40%	83,200 (can potentially add ticket machine proportions as well)
Ticket machines at LGW	Low (few machines no promo)	4%	5%	5,200
	High (Oyster pushed through NR machines, lots of promotion)		25%	26,000
Commuters	Low (no push, just relying on them to move)	14%	60%	218,400
	High (information provided, advertising, provision of more alternatives)		90%	327,600
Partnership with Southern	Low (more sales on board, slightly more at windows)	22%	5%	28,600
	High (big push for window and onboard sales, high level of publicity on train and at stations)		35%	202,200