National Assembly for Wales
Enterprise and Business Committee

Inquiry into the future of the Wales and Borders Rail
Evidence from Passenger Focus – WBF 8 3

Submission to Enterprise and Business Committee Inquiry: Future of the Wales and Borders Rail Franchise

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1. Introduction

1.1 Passenger Focus is the statutory watchdog for rail passengers in Great Britain; and for bus, tram and coach passengers in England (outside London). Our mission is to get the best deal for passengers. With a strong emphasis on evidence-based campaigning and research, we ensure that we know what is happening on the ground. We use our knowledge to influence decisions on behalf of passengers and we work with the industry, passenger groups and government to secure journey improvements.

1.2 This submission focuses on the following areas:

i) Passenger experiences from the existing franchise

ii) Passenger priorities for development and delivery of future rail services

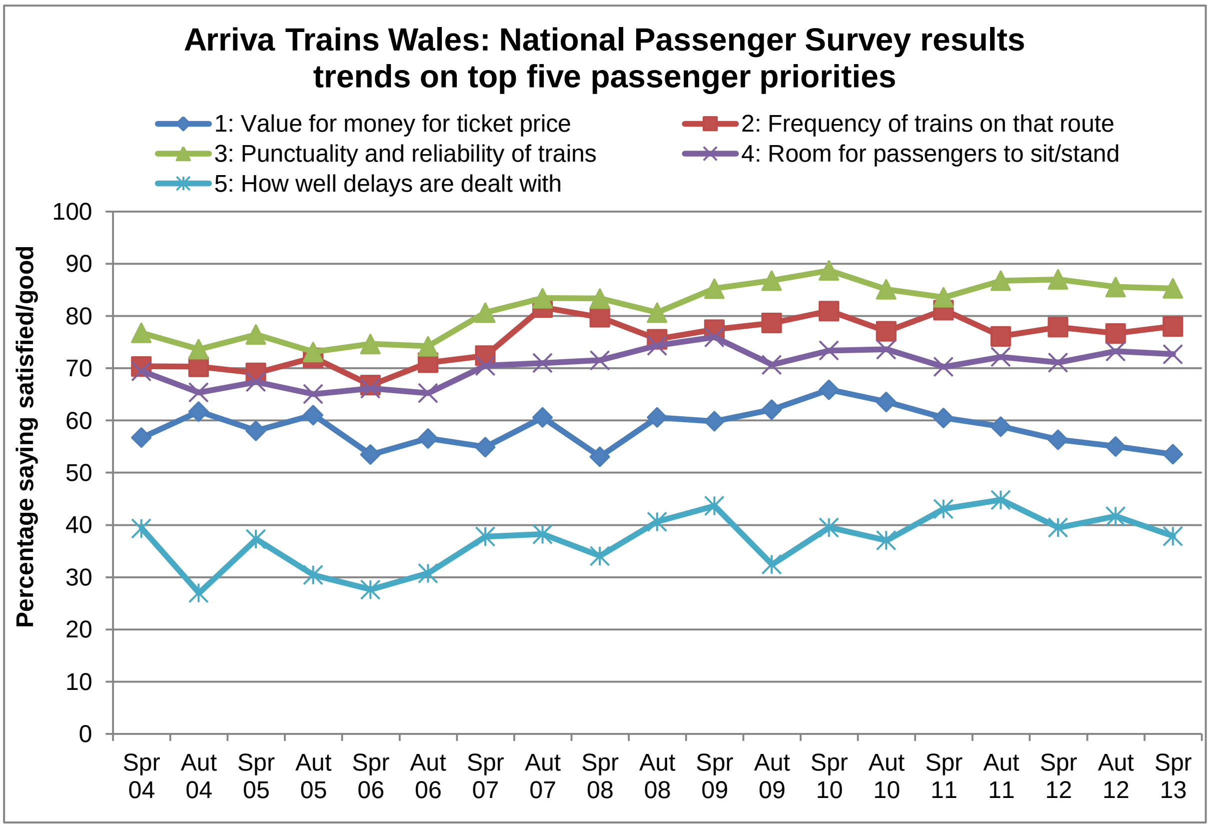
iii) Value for money and connectivity for passengers after 2018

2. Passenger experience

2.1 Passenger Focus conducts the National Passenger Survey (NPS). We consult over 50,000 passengers a year to produce a network-wide picture of passengers' satisfaction with rail travel.

2.2 Our research shows that passengers tend to be focused on the outputs that matter to them – the value for money for their ticket, how frequent and punctual their service is, how many seats are available and whether they are kept informed when there are delays.

2.3 Arriva Trains Wales (ATW) took over the Wales and Borders franchise in the autumn of 2003. NPS data has been tracking passenger satisfaction in two waves each year and the trends for these key factors over the operating period of this franchise is shown in the table below.



2.4 The overall scores for ATW can also be split into three routes: North Wales, South Wales and the Valley lines. These, plus a comparison with the sector average (i.e. the average for similar operators) can be seen in Appendix A.

2.5 Satisfaction with the upkeep and repair and the cleanliness of stations are noticeably below the sector average, while that for car parking is higher. Satisfaction with the actual train journey tends to be higher than the sector average particularly toilets and staff provision, also for cleanliness, upkeep and on-board security. It is noticeable, however, that satisfaction with punctuality and frequency of services is lower on North Wales services.

2.6 In an era of cost consciousness and efficiency it will be essential that scarce resources are focussed on the things that deliver the biggest passenger 'dividend'. Passenger Focus has a wealth of data on passenger priorities and drivers of satisfaction - summarised briefly in Appendix B. This work continually emphasises the importance of the 'core product' – a punctual, reliable, affordable railway on which you can get a seat. For us a key part of the passenger test is whether future proposals will result in improvements in these areas.

3. Developing future rail services

3.1 We believe it essential that proposals for future rail development addresses these key points:

Passenger engagement

3.2 Passengers feel detached from the franchise process and many would like opportunity for greater engagement. This agenda should encompass:

- passengers should know when a franchise renewal is coming up and have an opportunity to feed in their views
- when a franchise is let there should be a clear statement setting out what is being purchased for them
- passengers should have a role in monitoring franchise delivery

Passenger accountability

3.3 We believe it is important that the operator and the specifier of a service are accountable to the users of that service. To us this doesn't just mean 'democratic accountability' but also 'passenger accountability'. It will be important that the specifier and the operator set out how they intend to gather the views of passengers on the services being provided. Traditional 'hard' measures on delays, cancellations and crowding are important but so is the quality of service being provided. On the latter our strong preference is for targets based on what passengers think – the best judge of quality being those who have used the services in question.

Performance

3.4 We recommend that operational focus on 'right-time' arrival at all stops is made a core requirement of the new franchise, together with a requirement for publication of detailed performance information which will inevitably act as a catalyst to improvement:

- Challenging but achievable PPM targets for the franchise as a whole and key service groups
- Disaggregated punctuality, with passengers able to identify performance of individual trains
- Moves towards a 'right-time' railway, with a requirement to report performance of trains arriving at key intermediate stations

Dealing with disruption and provision of information

3.5 'How the train company deals with delays' is, by far and away, the biggest driver of passenger dissatisfaction. Passenger Focus recommends incorporating key objectives:

- Contractual targets to improve NPS satisfaction with the provision of information during the journey and a strategy developed and implemented to improve NPS scores for "how well the train company dealt with delay" and "usefulness of information during a delay."
- A facility for passenger emails or text alerts, warning of likely disruption, with an associated requirement to achieve a strong level of uptake
- Full adoption of the Association of Train Operating Companies' (*ATOC) Approved Code of Practice: passenger information during disruption* and compliance with the Good Practice Guides on provision of passenger information, together with a programme of audit and mystery shopping to assess delivery on the ground.

4. Value for money and connectivity

Fares and value for money

4.1 Passenger Focus has conducted extensive research with passengers on fares, ticketing and value for money and has identified many issues that remain to be adequately addressed. We would be pleased to explore this topic in further detail.

4.2 Whilst 'smart' technology will enable an enhanced offer of ticketing products and services, there is a wider agenda about fares, retailing and revenue protection that must be considered for the new franchise. However, the revenue protection strategy must provide safeguards for those who make an innocent mistake and whose intention was never to defraud the system.

Connectivity

4.3 Proposals will also need to set out the degree of interaction with the rest of the rail network. Passengers value the concept of a network and a seamless delivery of service. Proposals will need to show that it is still easy to make a journey from one area to another – the seamless journey must not acquire any rough edges.

Network integration

4.4 Passenger Focus conducted joint research with the Association of Train Operating Companies (ATOC) into the perception and reality of integrated transport[1]. This study aimed to gain a better understanding of the role played by

[1] Integrated transport: perception and reality. Passenger Focus/ATOC. February 2010

integrated transport in attracting new or infrequent passengers to rail; the problems making end-to-end journeys and priorities for improvement.

4.5 The main barriers we found were:
- the perceived cost of the ticket
- the perceived hassle of going by train
- an assumption that the door-to-door journey (except for long-distance) would be longer
- concerns about punctuality and reliability; particularly if there would be a change of train.

4.6 Other factors which influence the decisions made by passengers on whether to use public transport are the availability of information, travelling comfort, security and assurance that all stages of the journey will link up[2].

Modal integration at the rail station

4.7 Train stations can, in many instances, become local transport hubs. The development of the Station Travel Plan initiative is a good way of looking at how passengers get to the station and in identifying improvements. Key amongst these are bus links (in particular the timing of connections), cycle routes and secure storage at the station, and safe walking routes.

4.8 We also believe that car parking is an important part of integration plans, especially for long distance travel from main-line stations. As this involves an early departure and/or a late return, good car parking facilities can be even more important than for local journeys.

4.9 Passenger Focus research[3] has found that passengers travelling to a railway station from rural, semi-rural and edge of town locations will generally drive and park at the station. If they struggle to find a car parking space at their station they may turn their backs on the railway and drive exclusively. The NPS results show that satisfaction with car parking facilities for cross-border travel is on a par with the sector average but, at only 63%, still leaves plenty of room for improvement.

[2] Door to door by public transport – improving integration between National Rail and other public transport services in Britain, June 2009
[3] Getting to the station. March 2007

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Appendix A – Passenger Satisfaction in Wales

NATIONAL PASSENGER SURVEY RESULTS **Spring 2013**

Arriva Trains Wales and Main Service Groupings against Regional Sector average (% saying satisfied/good)	Regional Sector	North Wales	South Wales	Valleys	ATW
Overall satisfaction	**84**	84	87	90	**88**
STATION FACTORS					
Overall satisfaction with the station	**79**	75	78	80	**78**
Ticket buying facilities	**80**	77	82	77	**78**
Provision of information about train times/platforms	**86**	81	85	83	**83**
The upkeep/repair of the station buildings/platforms	**78**	68	72	69	**69**
Cleanliness	**80**	72	74	67	**70**
The facilities and services	**51**	59	54	44	**51**
The attitudes and helpfulness of the staff	**77**	75	77	77	**76**
Connections with other forms of public transport	**74**	70	64	64	**66**
Facilities for car parking	**52**	60	68	61	**62**
Overall environment	**73**	68	70	68	**68**
Your personal security whilst using	**70**	73	72	68	**70**
The availability of staff	**66**	63	68	65	**65**
The provision of shelter facilities	**72**	67	72	71	**70**
Availability of seating	**59**	53	62	52	**54**
How request to station staff was handled	**88**	93	88	93	**92**
TRAIN FACTORS					
Overall satisfaction with the train	**80**	84	85	84	**84**
The frequency of the trains on that route	**79**	66	76	85	**78**
Punctuality/reliability (i.e. the train arriving/departing on time)	**81**	80	86	88	**85**
The length of time the journey was scheduled to take (speed)	**87**	76	87	86	**83**
Connections with other train services	**78**	75	86	83	**82**
The value for money for the price of your ticket	**53**	54	55	53	**54**
Cleanliness of the train	**73**	82	82	75	**78**
Upkeep and repair of the train	**71**	84	83	74	**79**
The provision of information during the journey	**71**	68	77	62	**66**
The helpfulness and attitude of staff on train	**74**	80	87	81	**82**
The space for luggage	**60**	61	70	63	**63**
The toilet facilities	**38**	54	56	55	**55**
Sufficient room for all passengers to sit/stand	**73**	70	76	73	**73**
The comfort of the seating area	**72**	79	78	77	**78**
The ease of being able to get on and off	**83**	82	84	86	**85**
Your personal security on board	**79**	86	84	86	**86**
The cleanliness of the inside	**73**	82	80	76	**78**
The cleanliness of the outside	**65**	73	73	67	**70**
The availability of staff	**61**	68	80	73	**73**
How well train company deals with delays	**35**	44	55	30	**38**

More than 5% points higher than sector average

More than 5% points lower than sector average

Appendix B – Passenger Priorities in Wales

In an era of cost consciousness and efficiency it will be essential that scarce resources are focussed on the things that deliver the biggest passenger 'dividend'. The closer that national strategy is aligned with passenger priorities the better the potential service for passengers.

1. Rail passengers' priorities and drivers of satisfaction

1.1 As part of its input into the High Level Output Specification (HLOS) process Passenger Focus commissioned research into passenger priorities for improvement. Around 4000 passengers were asked to rank 30 different aspects of rail travel[4]. The work was repeated in 2009[5].

1.2 The table below shows the scores for Wales in 2009 with rankings for Great Britain for comparison. This shows three clear priorities for improvement: value for money, frequency and punctuality. These, coupled with seats/capacity in fourth place, emphasise the importance passengers place on the 'core product'.

1.3 It is also noticeable that passenger security on board trains and connections with other train services are of significantly higher importance in Wales, whilst improved security at stations and good easy connections with other forms of transport also rank higher than Great Britain.

Wales Rank 2009	Great Britain Rank	Attribute
1	1	Price of ticket offers excellent value for money
2	3	Sufficient train services at times I use the train
3	2	At least 19 out of 20 trains on time
4	4	Passengers are always able to get a seat
5	5	Company keeps passengers informed of train delays
6	**12**	**Passengers experience a high level of security on the train**
7	**18**	**Connections with other train services are always good**
8	8	Trains consistently well maintained / excellent condition
9	6	Information on train times/platforms accurate and available
10	13	Inside of the train cleaned to a high standard
11	9	Seating area of the train is very comfortable
12	**14**	**Personal security improved through CCTV / staff at stations**
13	16	All trains have staff available to help passengers
14	**15**	**Good easy connections with other forms of transport**
15	17	All train staff helpful/have a positive attitude

[4] Passengers' priorities for improvements in rail services. July 2007
[5] Passengers' priorities for improvements in rail services. March 2010

1.4 Well integrated transport needs combined aspects of positive security and good connections in order to be attractive to passengers, as these are key considerations when deciding whether to drive or use public transport.

1.5 Fares

1.5.1 Passenger Focus' research[6] shows that passengers rate value for money as their top priority for improvement on the railway, and our National Passenger Survey shows that only 58% of cross-border passengers are satisfied that they get value for their money.

1.6 Staff

1.6.1 Sir Roy McNulty's report on value for money in the rail sector (May 2011) contained a number of far-reaching conclusions for the rail industry and for passengers. Central to the report was a need to achieve a 30% reduction in unit cost by 2018-19 – representing a saving of around £1billion.

1.6.2 The report identified cutting staff costs (which are approaching £4bn a year) as a major priority. Amongst other things it recommended a move towards Driver Only Operation (DOO) and removing regulation on ticket office opening hours – presumably as a precursor to reducing retail staff.

1.6.3 Passenger Focus's research continually emphasises the importance of staff, particularly when it comes to issues of personal security, ticketing and the provision of information.

Personal security:

- Most passengers who have expressed concern about station security attribute this to having witnessed anti-social behaviour by other people at the station and a lack of station staff. It is the same story for concerns about security on-board trains.
- Passengers consistently identify the presence of staff as important to providing reassurance to those travelling on the railway. Passenger Focus research carried out in 2011[7] found that satisfaction with security at unstaffed stations was 9% lower than the average for staffed stations in Wales. Better lighting and CCTV were seen as key and passengers also placed a high value on being able to access real-time information via

[6] Passenger priorities for improvements in rail services. Passenger Focus.
[7] The passenger experience at unstaffed stations, February 2011

Customer Information Screens, particularly at times of disruption when passengers experience delays and cancellations.

- In terms of improving on-train security 75% of passengers believe that staff walking through the train would be effective.

Buying a ticket

- Passenger Focus research in 2008 found that many passengers queuing at ticket office window could have bought their ticket from a ticket vending machine (TVM).
- Further research in 2010 found that even some passengers who were used to buying tickets through a TVM experienced difficulty when asked to find the correct ticket for an unfamiliar journey. TVMs were often unable to provide the precise information or reassurance needed by the passenger.
- The ticket clerk will ask some basic and then offer the passenger a narrowed down range of options, navigating through the decision-making process. With TVMs on the other hand, passengers are left to work things out on their own.

Passenger information

- Staff presence at stations and on trains is considered an extremely important medium for delivering information – especially at times of unplanned disruption. Passengers express a strong desire for staff to be available on station platforms so that they can provide confirmation of the information displayed on screens, before committing to board a train. Staff are often assumed to be aware of the latest available information, and may be sought out by passengers who want updates or reassurance on whether trains are running to schedule.
- There is a very real danger that staff are seen only as a cost without considering the value they are adding. There may be scope for efficiency savings - more multi-functional staff for instance – but the debate must not simply be about cost. A visible staff presence brings real benefits to passengers which any review must also take into account.