Wales and Borders rail service - passenger research

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Prepared for Transport Focus

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Contents

This pack reports the findings of qualitative research undertaken with passengers using the current Wales and Borders rail service. These findings are based on the views expressed by participants in the focus groups who were asked to speak candidly about their experiences and identify improvements for the future.

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Acknowledgements

Background, objectives and methodology

Background

The review process

Currently Arriva Trains Wales operate the majority of train services within Wales. The Wales & Borders franchise ends in 2018 and for the first time, the Welsh Government will become responsible for choosing a new provider. Four companies are competing to run train services in Wales:

– Abellio Rail Cymru

– Arriva Rail Wales/Rheilffyrdd Arriva Cymru Limited

– KeolisAmey

– MTR Corporation (Cymru) Ltd.

Background to the process

The Welsh Government has a clear ambition to deliver an improved, faster and more accessible rail service fit for modern Wales. This development has four key elements:

High frequency: four times an hour offering a 'turn up and go' experience

Integrated: all modes of transport working together as one service

Extendable: wider network, new stations, new routes, connecting more areas

Regeneration: better passenger facilities and improved stations

Background

Priorities for the Wales & Borders rail service

Against this backdrop of complex change and ambitious development, Transport for Wales has been established by the Welsh Government to provide support and expertise to the Welsh Government in connection to public transport projects in Wales. Transport for Wales is a wholly-owned, not-for-profit company and its current remit is to undertake the procurement process for the next Wales and Borders Rail Service, including the South Wales Metro, on behalf of the Welsh Government. Stated priorities for new bidders are to provide:

– Updated rolling stock

– Reduced journey times

– Modern technology

– Improved customer service

– An integrated transport system

Transport Focus

Transport Focus is the independent watchdog that represents the interests of Britain's rail passengers. Transport Focus is engaged in influencing all franchising competitions, specifically in terms of setting out passengers' needs in any new contract award. With this in mind, for any new rail service on the Wales & Borders network, decisions need to be made about how best to meet the needs of various passenger groups on a series of key service elements.

– Previous research by Transport Focus highlights the following as priorities for the new Wales & Borders rail service to address: capacity and frequency; value for money; punctuality and reliability; effective disruption management

– Also highlighted as requiring attention are personal security on board trains, cleanliness inside trains, provision of accurate and timely information and, to build trust further, clear and open communication.

Research objectives

Overall aim: Is to gather insight on what passengers want from a new service, including areas that need improvement and any aspirations for the future.

In order to fulfil this aim, a full exploration of the journey experiences and aspirations of rail passengers is needed

A: Pre-Journey experiences: logistics, planning, ticketing, accessing the network

Network accessibility	Network scope	Route	Calling points
Existing service provision	Service frequency	Time-tables	Length of journey
Planning journeys	Systems, range of information	Particular needs of leisure/business/commuter/frequent/infrequent	
Ticketing/pricing	Commuter/Leisure/Business: ticket / fares best match travel patterns		Needs and experiences
Access to the network	Accessing the railway	Barriers to usage	Required improvements
Station requirements	Facilities, environment information	Inter and modal change, destination	Car parking/facilities for cyclists

B: On-board experience: seating, comfort, using time productively/enjoyably, personal security, role of staff, service disruption

Getting a seat	Reasonable expectation	Standards required for seating where a seat is unavailable	
On-train comfort	Seating comfort	Cleanliness and toilets	On-board catering
Able to work/relax	Consider all user needs: leisure/business/commuter	Provision of Wi-Fi, power chargers, luggage storage	Layout and ability to chat/relax/work
Personal security	Where/why and when	What would improve confidence: role of CCTV, technology, help-points, staff	
Role of staff	How many/where/when	Terms of engagement	Reasonable expectation
Service disruption	Information/communication needs	Action required during disruption	Views on replacement rail services

C: Objectives outside of the journey experience:

| The role of the railway alongside other modes of transport | The Metro / Network synergy | **Performance:** what is expected/required, information to be made available, reasonable compensation | **Communication:** correspondence, helplines, complaint resolution, wrong ticket scenario, favoured channels, availability | **Engagement with TOCs:** information, consultation, issues for specific users | Understand any specific issues affecting disabled travellers | NB: In the borders regions we aimed to explore any issues surrounding the inclusion of Transport for Wales in future management of the network |

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Research method

A research approach was chosen that included a number of different focus group locations across Wales and the Borders. This approach was chosen to reflect the diversity of the Wales & Borders network. The research method included three clear outputs, these were:

Pre-tasks

All respondents completed pre-tasks in preparation for the research, which were brought along to be discussed at the groups

– Respondents were tasked with a diary exercise to record their most recent journey (or journeys for more frequent travellers) on Wales & Borders trains. This enabled more immediate 'in-the-moment' experiences

– Where possible/ appropriate, they were asked to use a smart phone app: Experience Fellow. This provided a wider range of inputs, such as images and commentary which could be tagged to location/stage of journey

Lobby questionnaire

Each respondent completed a short quantitative questionnaire immediately before the group discussion. This was designed to provide feedback on core attributes and key service elements.

NB: The number of respondents completing this quantitative exercise is not sufficient for the data to be statistically robust, instead the results should be treated as indicative

15 x focus groups

Locations were chosen to provide a representative cross-section in relation to the Wales and Borders coverage:

– 2 x 1.5 hour full focus groups with Welsh speakers: given the high incidence of Welsh speakers in North and mid-Wales we conducted Welsh speaking groups in Machynlleth and also provided respondents the option to compete pre-tasks in Welsh if they wished

– 8 x 1.5 hour full groups and 5 x 1.5 hour mini groups conducted in English

10 x 1 hour depth interviews with disabled passengers (particularly those suffering from visual impairment and mobility issues)

Specific recruitment criteria and quotas for group and depth respondents are outlined in the following slides

Recruitment criteria

Group discussions

	Location	Journey purpose	Frequency	Welsh speaking	Mini / Full group
1	Cardiff	Business	Frequent	N	Full
2	Cardiff	Commuter	Frequent	N	Full
3	Machynlleth	Leisure	Infrequent	N	Full
4	Machynlleth	Leisure	Mix	Y	Mini
5	Machynlleth	Leisure	Frequent	Y	Full
6	Swansea	Commuting	Frequent	N	Full
7	Swansea	Leisure	Frequent	N	Full
8	Llandudno	Leisure	Infrequent	N	Full
9	Llandudno	Commuting	Mix	N	Full
10	Telford	Leisure	Frequent	N	Mini
11	Telford	Commuter	Frequent	N	Mini
12	Chester	Commuter	Frequent	N	Mini
13	Chester	Leisure	Infrequent	N	Mini
14	Hereford	Business	Infrequent	N	Mini
15	Hereford	Leisure	Frequent	N	Mini

Depth interviews

	Location	Journey purpose	Frequency
1	Swansea	Commuter	Infrequent
2	Swansea	Leisure	Infrequent
3	Cardiff	Commuter	Frequent
4	Cardiff	Leisure	Infrequent
5	Cardiff	Business	Frequent
6	Machynlleth	Leisure	Frequent
7	Llandudno	Leisure	Infrequent
8	Shrewsbury	Leisure	Infrequent
9	Hereford	Leisure	Frequent
10	Chester	Commuter	Frequent

Executive summary

Key takeouts

Wales and Borders is seen as a rail service that **rarely, if ever, delights and often struggles to get the basics right**

While there is significant regional variation, almost all passengers agree on the **key issues**:

– The network feels underinvested and lagging behind services elsewhere
– There is little affinity between the customer and the brand
– There are 'gaps' in the network, especially from Mid-Wales to the South
– There is little sense of any organising structure underpinning transport in Wales at a higher level

The perceived consequences of this are seen in terms of a service that **rarely produces catastrophic failures, but persistently falls down on fundamentals**:

– Overcrowding, especially on commuter services, and to perceived dangerous levels
– Rolling stock that is dated, poorly maintained and lacking in amenity
– Frequent (if relatively minor) shortfalls on punctuality and reliability
– Neglected stations
– Seeming disorganisation (or even lack of care?) in failing to manage predictable peaks in demand (e.g. major sporting events) or even difficulties in buying a ticket
– A sub-standard proposition for longer distance travel e.g. to the Midlands and the North
– A lack of co-ordination/integration within area and across modes

In light of the above, priorities for improvements **are relatively modest and focussed on fixing what is wrong and bringing services 'up to par' with elsewhere in the UK**
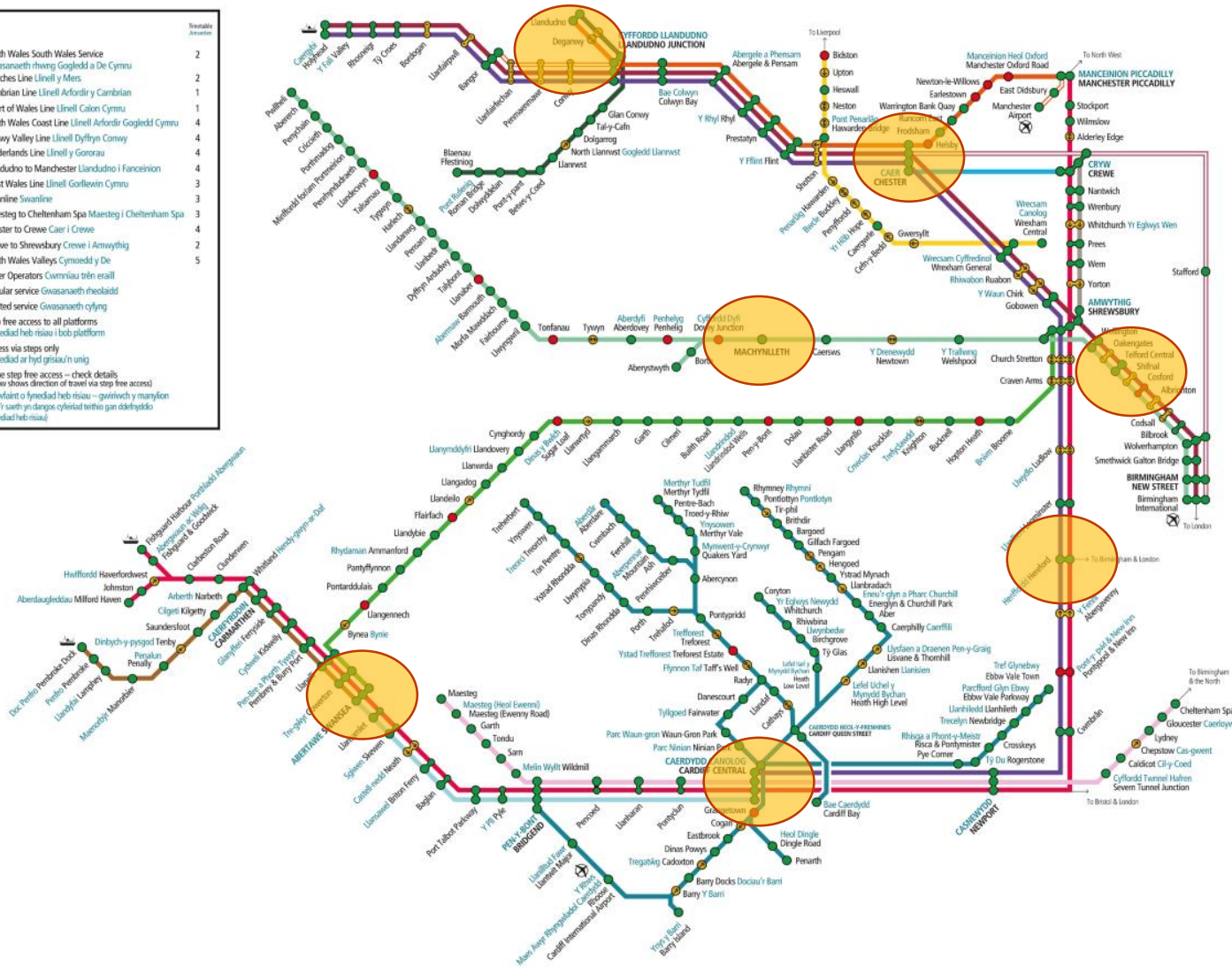
Regional focus

Route map and locations covered

Locations have been divided into four areas:

– South Wales

– Mid-Wales

– North Wales (including Chester)

– Borders

Each location has specific issues that are highlighted on the following slides

Some issues are prevalent across all locations, including:

– Poor rolling stock

– Overcrowding

– An outdated service.

Regional focus: South Wales

Swansea

Cardiff

Journey types

– Commuting & leisure journeys into Cardiff and Swansea from outlying towns and villages

– Commuting & leisure journeys between Cardiff and Swansea

– Some longer distance business & leisure journeys via the Borders to the Midlands and North of England (and more rarely to mid or North Wales destinations)

– Many also make use of Great Western for London journeys

– Leisure (mainly) trips to the coast, especially in summer.

> Personally for me in Llandaff, I think the service is fantastic. The frequency of trains is fine for me.
> Cardiff commuter, frequent

Why choose the train?

– For commuting and shorter distance leisure journeys, the train typically wins on a cost basis compared to driving and parking

– And on a convenience level vs. the 'hassle' of traffic congestion and parking

– For leisure, having a drink can be an important consideration

– On longer distance leisure and business trips, the cost comparison with driving is not always clear cut, depending on: fare achieved, who is paying (self or employer), and the number of people travelling

– However, the train is (usually) less stressful than driving for longer trips and provides opportunity to use time for work/ relaxing.

> It's so much more convenient and I know I'm going to get to work on time.
> Cardiff, commuter frequent

> I suppose sometimes you feel like if it's a nice day to go to Cardiff you could drive, but it's so much easier to get on the train and sit back, read a magazine, have a coffee and get off the other end and just catch a taxi to where you want to go.
> Swansea, leisure frequent

> You know looking for parking and all the hassle and the prices as well, my friends and me just jump on the train, on a bus to Swansea, jumping on the train and get off at Cardiff and straight in
> Swansea, leisure frequent

Regional focus: South Wales

Key issues

- Overall **service provision into and between main urban areas seen as reasonably good**, but some later evening running (esp. at weekends) and Sunday services would be welcomed

- Journeys to mid and North Wales and to England (other than on Great Western) are seen as 'long & laborious'

- Key issue **is frequent and severe overcrowding**, compounded by **regular service failures** (late running, short notice cancellations) and poor rolling stock (old fashioned, limited seating, often dirty, poor temperature control, limited luggage space, unpleasant toilets)

- There is a seeming **failure to plan** for peak demand and for predictable surges (e.g. sports events)

- Anti-social behaviour (esp. on late night trains can be an issue) compounded by lack of staff.

- **Buying a ticket on board can be difficult** (esp. when crowded) and ticketing not always straightforward (easy to buy the 'wrong' ticket)

- **Commuters bear the brunt** of these problems, especially the Valley lines, but congestion and rolling stock are issues for all passengers

- Given this, while fares in themselves are reasonable for local journeys, given the poor service, they are **seldom seen as good value**

- Key stations like Cardiff Central and Swansea seen as **'shabby' and in need of regeneration**

- Smaller suburban/ rural stations have very little amenity (even lacking adequate shelter from weather at times) and can be intimidating at night

- Perception of **limited coordination between rail and other modes**; little sense of an urban or regional 'plan'.

Improvement priorities?

- Many (esp. commuters) are **resigned/ fatalistic** about the service, seeing little evidence of improvement or plans for the future

- Priorities are therefore focussed on straightforward 'here & now' actions to **bring the service up to a C21st standard** and in line with what they believe – and see- exists elsewhere

- More capacity

- Improved reliability

- Modern rolling stock and stations.

> If they weren't so quick then I would never get a train because you can never get a seat, especially in the mornings. First thing in the morning it's ridiculous, and they've got like two carriages every morning. Then, on the days where they start in the middle of the day, when there's no one on the train, there's about six carriages! Cardiff commuter, frequent

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Regional focus: Mid-Wales

 Machynlleth

Journey types

– Most passengers made a range of journeys, notwithstanding main purpose

– All used the train for leisure, with a combination of regular local journeys and more occasional further afield: B'ham (& airport), Shrewsbury, Manchester, Liverpool & London

– A few also commuted from Machynlleth to Aberystwyth

Why choose the train?

– Main motivations for travelling by rail are convenience: avoiding stress and costs of driving (particularly on motorways) and parking

– In terms of costs, train is *usually* seen as cheaper than driving if parking and wear & tear are taken into account (which not all do), though less so if travelling in a group

– However, many valued the convenience/ flexibility of driving and some preferred to drive if travelling with large amounts of luggage/ major shopping

– Buses used mainly for local travel but occasionally further afield to destinations not served by rail network.

[Train travel] It's more convenient. You can have a cuppa, do some work. It's nicer than being in the car. It's not just the driving. Parking is a hassle
Machynlleth, leisure frequently

The number of trains travelling from Machynlleth has increased in recent years and go often enough from the local station – hourly during the day and two-hourly later in the evening
Machynlleth, leisure frequent

We're lucky here because the station is so close and you can get to pretty much anywhere.'
Machynlleth, leisure mix

Regional focus: Mid-Wales

Key issues

– Most feel **fairly well-served by rail services, particularly compared to many other parts of Wales** and see the railway as a vital community resource. Many are particularly positive about the **Cambrian Line**, highlighting the quality of the scenery and service in general.

– Generally satisfied with the frequency of services and the recent increase in trains from Machynlleth

– **Staff are frequently praised** and often cited as going the extra mile to help e.g. providing advice on fares

– Gaps are seen in **the North-South rail provision** (Aberystwyth to Carmarthen/ Pwllheli to Bangor) and the somewhat convoluted route to Cardiff via Shrewsbury

– Punctuality also seen as mostly reasonable.

– Local stations mostly seen as reasonable although some complaints about lack of shelter and some problems with accessibility and car parking

– Some praised Arriva for involving schools in decorating local stations.

– The key issue for this audience is **rolling stock:** cold, dirty trains (particularly toilets and windows), 'grubby' seats

– Improvements in terms of wifi and power sockets on board were noted although complaints that they did not always work

– **Overcrowding**, while not as severe as in South Wales, **also a significant issue** and again, it is thought that known peaks and predictable surges in demand e.g. summer holidays, university start/ end dates at Aberystwyth, are not planned for.

Improvement priorities?

– As with other areas, **a general programme of upgrading and modernisation is required,** particularly as regards rolling stock, but also addressing capacity

– Again, **Wales & Borders is compared unfavourably with services elsewhere** in the UK.

> They need more carriages. Everyone's crammed into two carriages at Shrewsbury. They know it's a problem. It happens too often Machynlleth , leisure, infrequent

> We are surrounded by caravan parks you know and holiday parks and things and the train is jam packed with holiday makers you know coming into town and then going back to the caravans. And the trains are absolutely jam packed you know it is standing room only most of the time Machnylleth Interview

Regional focus: North Wales

Llandudno   Chester

Journey types

– Commuting into and out of Llandudno, from Llandudno to Chester, from Chester to nearby towns

– Some commuting at weekends as part of the hospitality and retail industry

– Many leisure journeys across the North Wales coast going both ways between Llandudno and Chester

– Many leisure journeys from Chester to Manchester

– Leisure trips to London where changes are made at Crewe.

– *Note. Chester is included here because it uses the same train lines as North Wales*

Why choose the train?

– Commuters from both Llandudno and Chester find the train cost effective, particularly in comparison to driving

– Traffic congestion around Llandudno and in the surrounding areas of Chester seen as bad enough to trade off with shortcomings of the train service

– Leisure travellers enjoy space and comfort of the train at off peak times and out of season times

– Alternative modes such as bus travel seen as out of the question due to the slow nature of travel.

> I quite like to have that leisurely time around my headphones moments and especially the route that I go on a lot it's more scenic and more relaxing, you don't get much hassle
> Chester, commuter frequent

> Well you're not going to get into a traffic jam on train are you?
> Chester, commuter frequent

> Going out for drinks or shopping in Chester; Chester races as well
> Llandudno, leisure infrequent

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Regional focus: North Wales

Key issues

– The key issue in Llandudno is the **changes to the service in high tourist season**. The service becomes **overcrowded** and passengers then face issues related to that; uncomfortable journeys, high temperatures, dirty rolling stock, delays and cancellations

– **Passengers do not see any evidence of mitigation of the issue of overcrowding**. This frustrates many as they see overcrowding as a highly predictable problem

– **Chester commuters** feel the same way about **overcrowding**, however the issue is far more persistent (i.e. not only in high tourist season)

– Also seen as predictable and the solution appears obvious to passengers; **additional carriages to deal with capacity**

– **Persistent delays** to services diminish the expectations of passengers. Instead of frustration, the feeling is often despondency

– The **rolling stock is seen as dated** and compares poorly with other more modern trains. Again this gives passengers the perception that Arriva Trains Wales as a company underinvests in their local train network

– Passengers have concerns with the **timetabling and frequency of trains during peak hours and late at night**

– More trains in peak hours seen as a solution to overcrowding

Improvement priorities?

– Additional carriages on trains

– A more frequent service

– Upgraded rolling stock.

> Not enough carriages because the line I travel, I get on in Chirk where my daughter is and like the students are going back to Bangor, the university, and you've got everybody on there, they put two carriages on Llandudno, leisure infrequent

> You can't even get a seat until you get to Chester, and then they move up the corridors by the toilet, everywhere. You cannot move and in the summer, oh it's horrendous. Llandudno, leisure infrequent

Regional focus: Borders

Hereford   Telford

Journey types

– Birmingham is a common commuter and leisure destination

– Leisure trips to English cities are common: Birmingham, Manchester and London. Trips into Wales are less frequent although Cardiff is mentioned

– Given more frequent trips into England, there are competing train services on some of the lines like London Midland

– Both leisure and business trips are more likely to be to England than to Wales

– Overall service provision is seen as reasonable, particularly in Telford where there are a range of alternatives and quick access to Birmingham.

Why choose the train?

– For most, it is a choice between the train or a car: other transport choices are not popular

– The train may be faster than driving, especially when travelling into a town or city – for example, Manchester or Birmingham

– Trains less congested than roads (although this depends on local knowledge) and as such journey time tends to be more reliable

– The train allows users to have a drink on social excursions

– Off-peak, the train is more comfortable than other options and allows passengers to work as they travel

– Trains cheaper than cars, especially after taking into account parking and petrol.

> You can put your feet up... If you get a seat it is very relaxing
> Hereford, Leisure frequent

> I always think that the staff are really nice and polite and really helpful.
> Hereford, business infrequent

> If I'm going to meet friends for drinks... then that's when I use it because I don't want to be over the limit driving back.
> Hereford, Leisure frequent

Regional focus: Borders

Key issues

– **Congestion** – either during a rush hour or during a regularly busy service like the last Saturday night train from Birmingham – can be 'unbearable'

– **Pricing feels unfair**. Those who must stand pay the same as those with a seat and those with a season ticket do not have a reserved seat whereas those with a single do. Station parking is seen as expensive

– **Safety and security is felt to be neglected**, particularly at night. There is some debate over whether it is worse when alone vs. amongst rowdy drunken crowds. Many point to unlit rural stations as something they would rather avoid at night

– **Rolling stock seen as old fashioned and poorly maintained**, with toilets a particular bad issue. In Telford the rolling stock compares poorly to other local operators such as London Midland and Virgin Trains.

Perceptions of Transport for Wales

– **Some ambivalence about Welsh Government involvement** in the new rail service

– Some feel that the Welsh government is likely to have a positive impact, reflecting policies observed in other areas

– But there is some concern that the **Welsh government might prioritise the needs of the Welsh population**

– But **overall, the logic of the network/ geography is accepted** and the outcome likely to be a better service all round.

> They have a smaller area then which they can concentrate on, they could possibly give us a better service.
> Telford, leisure frequent

> A not-for-profit could be a good thing, then they are going to put more money back into the actual service you would hope.
> Hereford, leisure frequent

Improvement priorities?

– Peak times need to be taken into account. **More carriages or more trains** to accommodate the extra passengers is a priority for most

– Cheaper **pricing/discounts** for loyalty would be appreciated, particularly for commuters who regularly have to stand for journeys

– **Rolling stock to be better maintained** and modernised.

> Standing is the worst. I mean you stand for an hour and a half, that's an awful long time and, I don't know, I suppose if you're going to Manchester you're standing for a lot longer than that.
> Telford , leisure frequent

> I think the Welsh Government, you know, you get free prescriptions and that in Wales so they do tend to take care of their population a bit better. If they have the same principle with this then it will improve
> Hereford, leisure frequent

Choice of transport mode

Passengers are using Arriva Trains Wales for reasons largely generic to train travel

Convenient

– The network covers many A to B journeys that can be completed on the train

– Stations available at key destinations for work and home.

> It's cheaper on the bus, but it's just quicker and easier to go on the train
> Swansea, leisure frequent

Enjoyable

– Scenic routes

– *Relative* comfort

– Can incorporate social experiences for leisure travellers

– Can provide space to work on-board for business and commuter journeys

– Children enjoy train travel.

> On train travel: It's more convenient. You can have a cuppa, do some work. It's nicer than being in the car. It's not just the driving. Parking is a hassle
> Machynlleth, leisure, mixed

Quick & (mostly) reliable

– Faster and more predictability than cars and buses on what is seen as an increasingly congested road system.

> On the times I have caught the bus when the trains have been cancelled, it's taken 45 minutes to an hour to get from Llanishen into central Cardiff. Whereas the train, if I caught it from Ty Glas into Queen Street it takes eight minutes
> Cardiff, commuter frequent

Cost effective for short journeys

– Often cost effective compared to other transport modes

– Compared to driving: the cost of petrol, insurance, buying a car and parking, commuters concluded that the one off cost of a season ticket is cheaper than driving

– Shorter journeys seen as reasonably priced (not always the case for longer journeys).

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Train travel has distinct advantages over alternative modes of transport

Driving (& often parking) seen as:

- Expensive compared to rail travel (although not for group travel)
- Time consuming due to poor infrastructure of local roads
- Difficult on congested roads
- Stressful due to the above issues.

> I don't have a car at the moment but I've also weighed up the problems if I did have a car. When travelling through peak hour it would just do my head in
> Chester, commuter frequent

Local buses often the only option

- Seen as suitable for short local journeys, especially if not time urgent, but where there is a train alternative, seen as…
- Slower
- Less predictable
- More limited comfort and amenity.

> If I end up having to get the bus, say, to Buckley or somewhere you've lost a good chunk of your day already
> Chester, leisure infrequent

For longer leisure trips, the coach is seldom the first choice

- Coach often **cheaper**, sometimes considerably so compared to rail
- But slower, more unpredictable and seldom an enjoyable journey experience.

> I never get the coach all the way to Chester. It would take about five hours going round all those little villages!
> Llandudno, leisure infrequent

Relationships with the operator and transport authorities

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There is little sense of relationship with the rail brand

Overall, passengers do not feel that they have a relationship with the current operator

– Struggle to articulate what the brand represents

– Notwithstanding the name and the use of the language, not seen as particularly Welsh

– Feel the 'relationship' is simply that of customer-supplier (although without many of the usual benefits of competition and choice seen in other markets)

– Underinvestment (worn-out rolling stock & stations etc.) often seen as a signifier of a lack of care for passengers, particularly given the lack of any countervailing narrative about improvements and progress

– Consequently, many are cynical and often resigned to the current situation (however poor).

What was the Heart of Wales line? Is that Arriva?
Swansea, leisure frequent

They're just out for themselves. don't think I have heard anything good about Arriva
Cardiff, commuter frequent

They'll take our money, but some of us can't even get on the train. They don't reimburse us. They don't even care.

Llandudno, leisure infrequent

I don't really know anything about Arriva. I don't think I have a relationship with them. I don't think they are anything specific to round here or to Wales; they're just a big business.

Cardiff, leisure frequent

Staff are helpful and provide a human face, but are insufficient in number

Interactions with staff are mostly positive

- Usually seen as knowledgeable and friendly

- In rural areas, seen as a feature of the local community and often 'go the extra mile' (e.g. ticketing advice)

- However, limited associations between staff and the brand

Issues with staff are mostly about their absence at stations and on trains

- In urban areas, safety concerns (on train or at station) increased by lack of staff

- Disruption made worse when staff not available to provide advice

- Ticket purchase is made difficult if no staff are available in ticket offices (or at times on trains)

- For disabled passengers, lack of staff is the main barrier to travel

> The conductors are always helpful if you want to know where to change trains, what platform you want or if you want directions…. …They do go the extra mile.
> Machynlleth, leisure frequent

> I only see one [Guard] on the train, so as I said, so if there was any problems on the train, he's not going to do anything is he?
> Swansea, leisure frequent

> If I get off at my local station late at night, I want the guard to be there with a light on. Otherwise it's scary. Staff definitely make that experience easier for me.
> Chester, leisure infrequent

Understanding of future developments for rail travel in Wales

Passengers know little about the franchising process

- Very few know anything about the role of the Welsh Government or Transport for Wales

- There is some awareness of electrification in South Wales and one or two have a vague understanding of the South Wales Metro concept

At a conceptual level, the involvement of the Welsh Govt./ Transport for Wales is seen as *potentially* positive

- The hope is that passengers' needs will be prioritised

Passengers along the border had few significant issues with the new rail service being awarded by the Welsh Government

- The transferal of powers to Wales is seen as justified due to the majority of the network being in Wales.
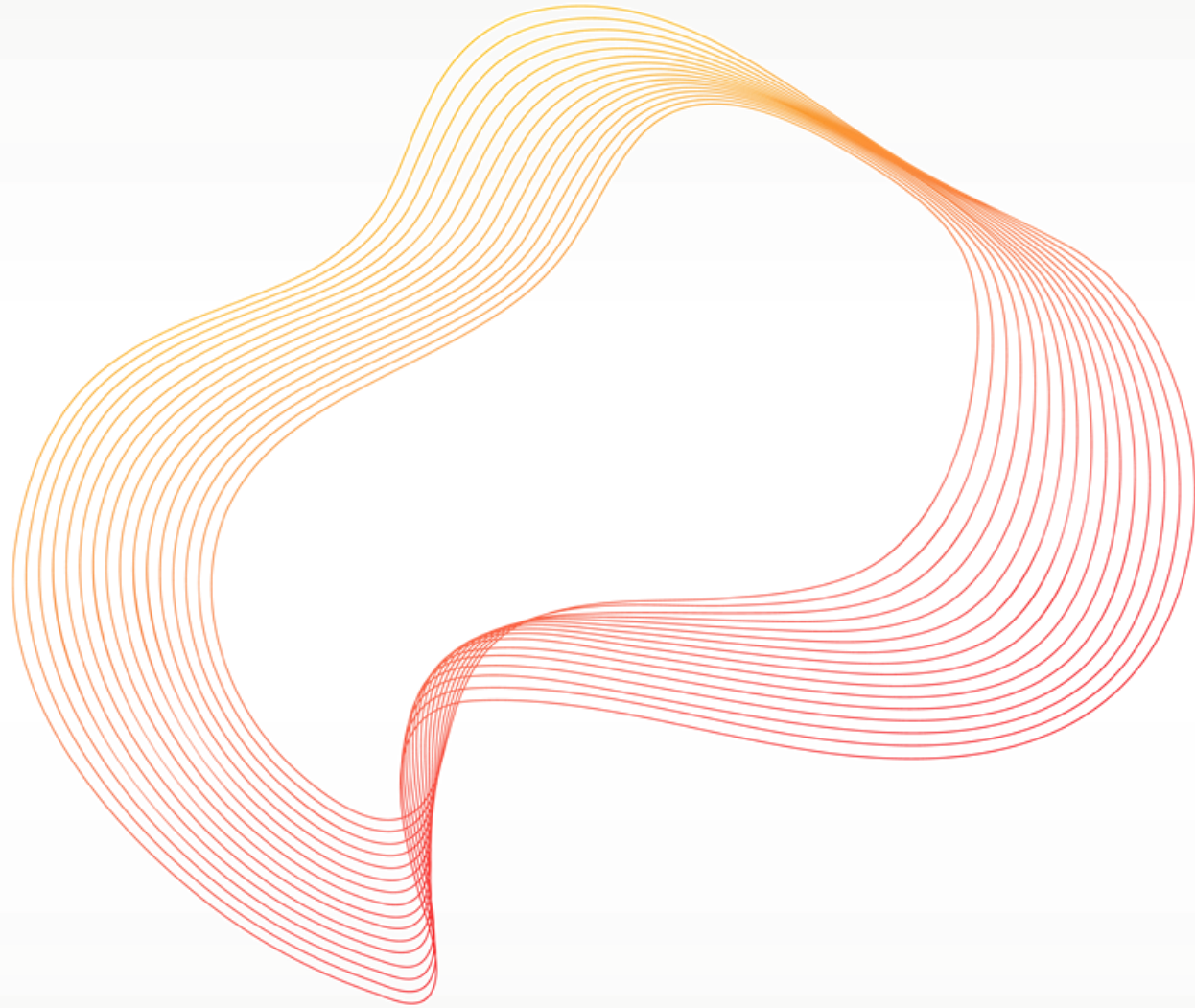
Electrification of the line, and faster and more frequent services but I'll believe it when it happens. They've got to actually start doing it, and then probably the chaos while they're doing it
Cardiff, commuter frequent

I couldn't imagine someone from Millennium Centre organising the London Underground. So the Welsh trains should be organised by the Welsh government. Not the English government running Welsh trains.
Chester, leisure frequent

The network is predominantly in Wales, so that is fair enough because the people of Wales will still get the trains that we get to Manchester for the people that travel there and to Chester. It doesn't bother me.
Chester, commuter frequent

I think it's OK if Wales have absolute power of their lines. Because if they have to report to the Department of Transport, then how much control do they actually have? It's beneficial for them and us if they have control further down the line.
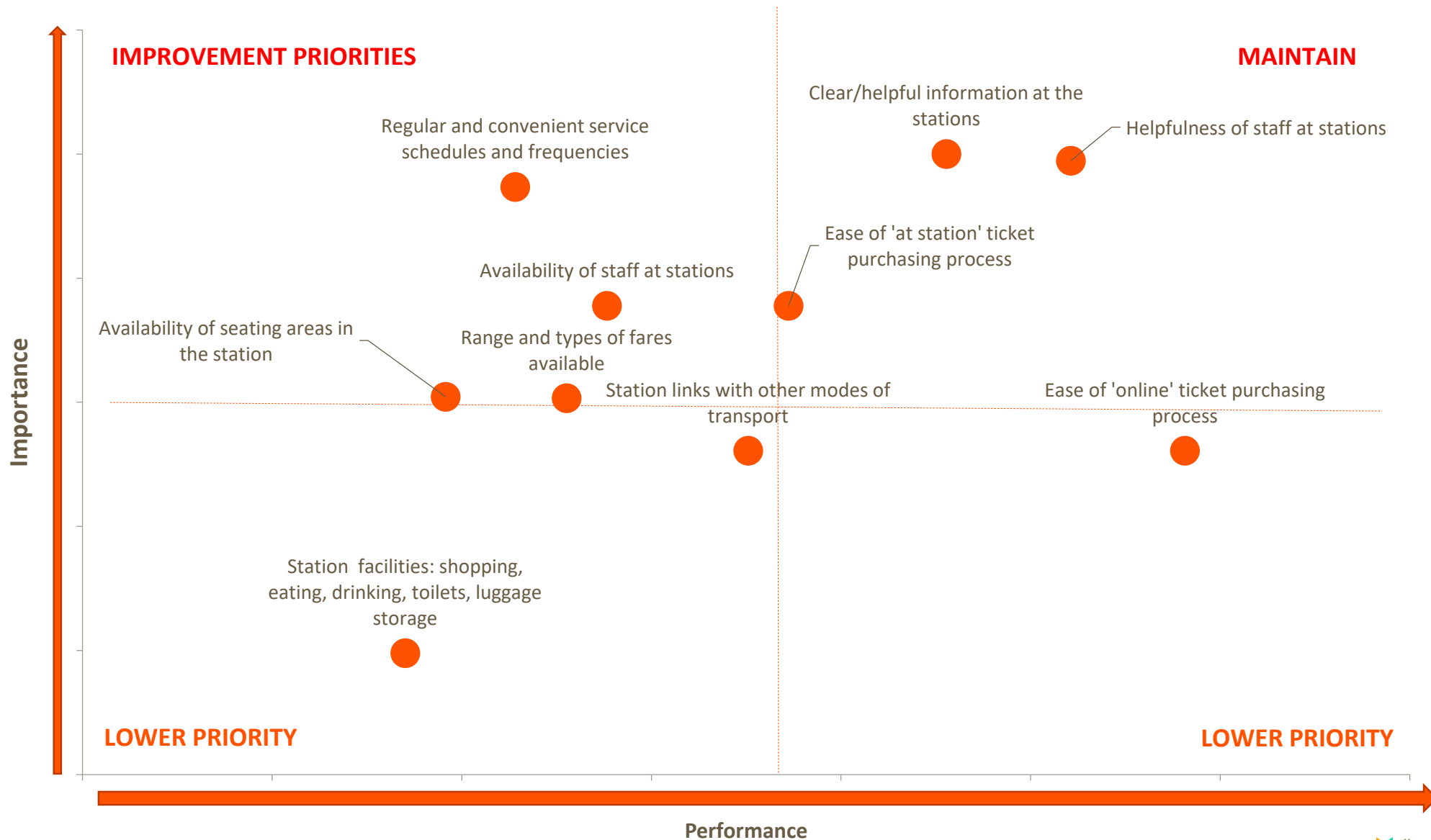Hereford, Leisure infrequent

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End to end journey experience

Pre-journey

Pre-Journey priorities matrix (performance/importance scores for passenger experience)

IMPROVEMENT PRIORITIES

MAINTAIN

Clear/helpful information at the stations

Helpfulness of staff at stations

Regular and convenient service schedules and frequencies

Ease of 'at station' ticket purchasing process

Availability of staff at stations

Availability of seating areas in the station

Range and types of fares available

Station links with other modes of transport

Ease of 'online' ticket purchasing process

Importance

Station facilities: shopping, eating, drinking, toilets, luggage storage

LOWER PRIORITY

LOWER PRIORITY

Performance

NB: Base sizes too small to be statistically significant

Illuminas

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Overall service provision

Rail services in Wales seen as substandard and old-fashioned

– As such, expectations are often fairly modest

– Passengers want the basics fixed rather than focusing on advanced improvements and a significantly enhanced service

– Congestion is the top of mind issue

A key gap in service provision is the link between mid-Wales and South Wales

– This leads to long and expensive journeys via England and Shrewsbury

– Longer distance journeys (e.g. to midland & North of England) are substandard compared to other 'main line' rail services.

Passengers do not highlight service frequency, of itself, as a problem

– In urban areas there is some demand for additional late night and weekend services

– But the key issue of overcrowding is seen as being primarily about insufficient rolling stock, although there are also calls for simply more services.

> There's about six an hour, so I'm happy with that. Things like when they're delayed and that, that's just a different topic altogether but frequency wise, fantastic. I can't fault them.
> Cardiff, Commuter frequent

> If you want to go anywhere to South Wales you have to go to Shrewsbury first, all the way out to Shrewsbury and then back down again you know that's, there's no way you can do like a day trip to Cardiff or something. You wouldn't have time..
> Machnylleth, leisure, frequent

Urban areas in South Wales have:

– An overall poor transport service

– A lack of coordination with other transport modes

Rural areas in Mid-Wales have:

– Seasonal overcrowding

– Slow and lengthy longer distance journeys

North Wales have:

– Similar issues to South Wales commuters

– Towns that aren't serviced by a station

– Gap between Pwllheli and Bangor also mentioned

Borders services compare poorly with other services (e.g. Virgin Trains)

– Other services seen to have adopted a more modern and sophisticated service

– Rolling stock cleaner, modern and faster.

Very few problems are experienced with journey planning

Online is the default approach for journey planning

– Key websites used by passengers include *The Trainline* and *National Rail*

– Leisure passengers typically use these sites to book journeys across the Wales and Borders network and further afield

– Many commuter passengers use these websites **every working day** to check disruptions on the line

– Choice of site is driven more by habit than objective evaluation of features

There is very little mention of Arriva Trains Wales own website

– This has been used by those passengers that do not regularly look for disruption updates, but may do on a 'one-off occasion', such as Storm Doris.

> The only time I needed to use the Arriva website was that Storm Doris. The line was down and I needed to see if I could get home from work, but that's the only time I use it.
> Llandudno, Commuter frequent

Websites and information is accessed on computers, tablets and smart phones

– Many have the *Trainline* and *National Rail* app, which are found as easy to use

– The platform of social media is not seen as a source of up-to-date information, instead a channel on which passengers could complain

> I get all the information on the times of trains from the Trainline website and then it shows you best price, because I'm always looking for... I'll book it in advance.
> Swansea, leisure frequent

A select few passengers still use more traditional methods of journey planning

– Paper timetables, calling national rail to ask for train times, using local ticket offices

– Passengers using these more traditional methods are typically infrequent leisure travellers that are older and/ or from rural areas

– Staff seen as particularly helpful in rural locations.

> The man at the ticket office at the station is great. He gives me advice on all sorts like what ticket I can buy and how much those cost.
> Leisure, infrequent

Many passengers find the array of tickets confusing and the fare structure opaque

Ticketing is complicated and expensive for long distance journeys

– Appreciation of the range of fares on offer and the **ability to get a bargain**

– But many struggle to understand **how to get the best deal**

– **Large price differences** between similar journeys often seem extreme and arbitrary

– Difficult to know **if one has achieved the optimum price** or what strategy one should adopt to do so

– Often results in **confusion and mistrust of the railway**

– N.B many passengers unaware of deals offered by Arriva Train Wales, such as group tickets

– Commuter season tickets seen as reasonable value but limited (e.g. single mode only going from A to B).

Getting a ticket can also be problematic

– **Lack of ticket offices** and ticket machines at suburban/ rural stations

– When ticket offices are open these are seen as reliable, but seldom open

– Lack of confidence in using ticket machines (or getting the best/correct fare)

– On local services, **can be difficult to buy tickets from conductors because of overcrowding or perceived lack of effort by staff** – can lead to delays or hassle at destination and/ or unjustified trouble for having incorrect /wrong ticket

– Long receipt-like tickets overly complicated difficult to fit in a wallet/ purse

– People value various types of railcards. (This applies to regional discount schemes e.g. Cambrian Card)

– But many are unaware of schemes and railcards.

> It is just... you know it will be one price today, another tomorrow.
> Swansea, leisure frequent

> They're very crafty, a single is practically the same price as return, really I can't find much difference in it. So sometimes if you go somewhere and you don't need a return or whatever, there's people there and you can have a lift back, but there's no point because you don't save anything.
> Swansea, leisure frequent

> Thing is, if I got to London I have to get these separate tickets. One going to Crewe and then one going from Crewe to London. But these prices don't make sense because sometimes I am paying more to go a shorter distance!
> Chester, leisure, infrequent

Stations are seen as highlighting underinvestment, particularly compared to elsewhere in the UK

URBAN

– Some urban stations are seen as renovated and up to date, such as Chester

– However key urban stations on the Wales and Borders network are seen as neglected and in need of investment

– Stations that should be 'flagships' (e.g. Cardiff Central, Swansea) compare poorly to English counterparts: dated, 'tatty', lacking amenity

– Intermodal transport in South Wales lacks coordination

RURAL AND SUBURBAN

– Lack of lighting, shelter, seating, toilets, cafes and ticket offices

– Many feel neglected with no staff or staff only at certain times; intimidating places to wait or alight, particularly at night, particularly in the cities

RURAL

– Some 'picturesque' stations that generate affection and are valued for their character

– Seen as part of the local community fabric

– Some have been part of community regeneration projects and this is valued

OTHER ISSUES

– Parking was seldom an issue, although was noted in Machynlleth due to temporary parking restrictions

– Help points seldom used and perceived as impersonal.

> For a capital city, Central Station's an embarrassment
> Cardiff, commuter frequent

> There's nowhere to shelter in Borth and the lighting is poor. They've shut the waiting room at Barmouth. It gets really draughty
> Machynlleth, leisure frequent
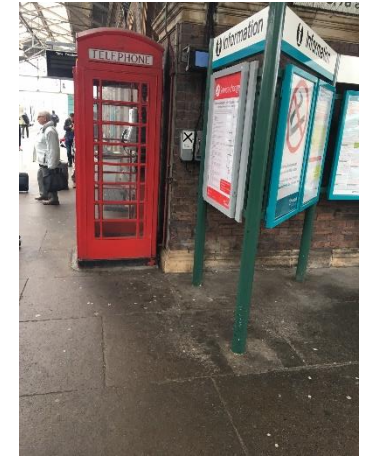
> I bet there's no one on the other end of those things [Help Boxes]. It's probably some automated thing.
> Hereford, leisure frequent

End to end journey summary- pre-journey

Overall Service Provision

- Rail services sub standard and old fashioned
- Gap in service provision between mid-Wales and South Wales
- Distinct lack of coordination with other transport modes and services

Information and journey planning

- Online is the default approach for journey planning, with *The Trainline* and *National Rail* websites the most popular
- A select few passengers are using traditional methods of journey planning (e.g. telephone or paper timetables)
- Planning at the ticket office is still valued in rural locations.
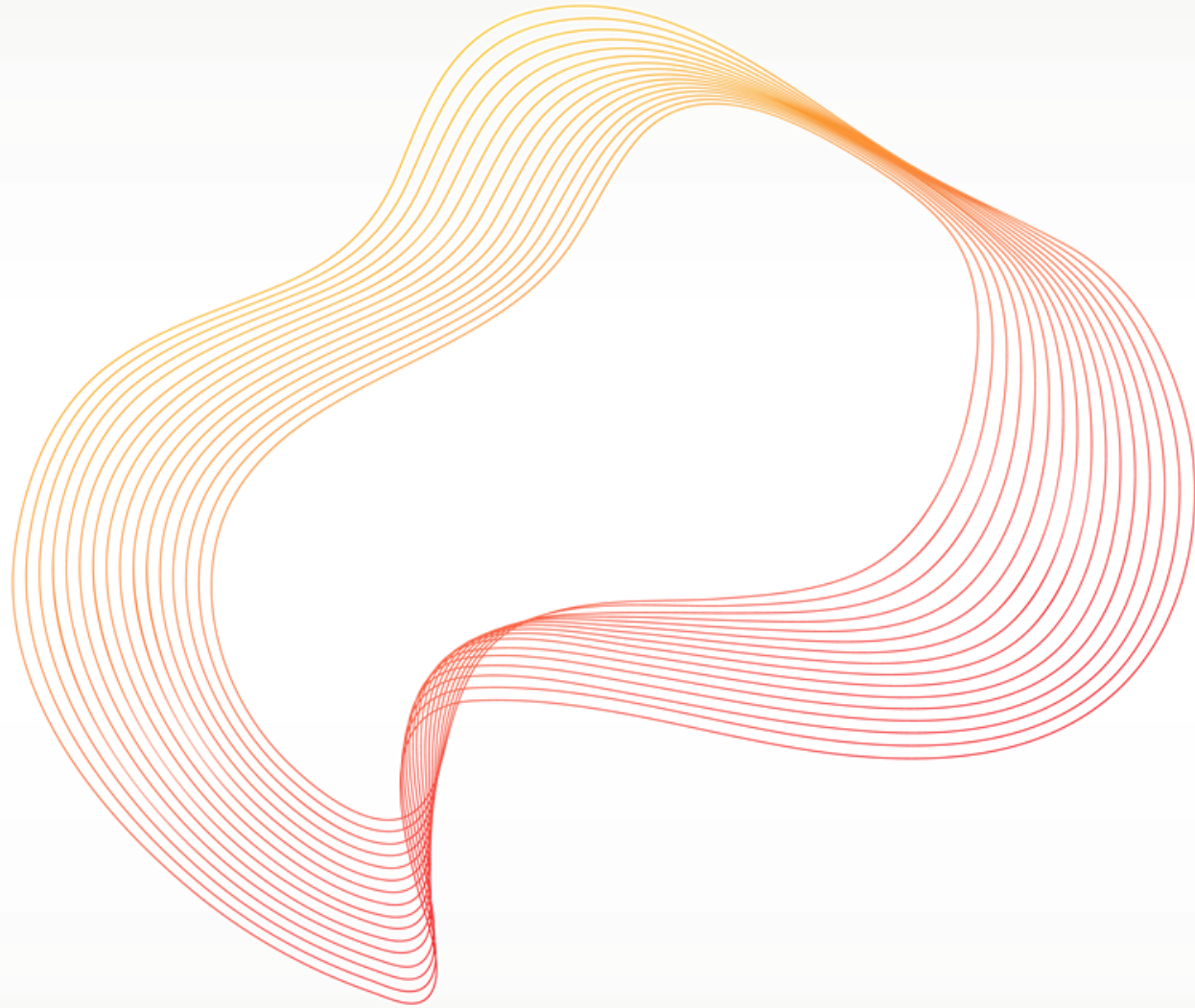
Stations

- Stations seen as an example of underinvestment
- A handful of urban stations are seen as up to date, such as Chester
- However, flagship stations such as Cardiff are seen as dated and in need of regeneration
- Many rural stations are seen as lacking in lighting and basic amenities.

Ticketing

- Passengers find array and complexity of tickets confusing
- Tickets for long distance journeys are expensive
- Getting tickets themselves can be problematic for those that do not use websites.

Punctuality and reliability

Illuminas

Punctuality and reliability- few examples of catastrophic failure, but persistent and ongoing shortfalls

Commuter expectations have been reduced consistently over time

– Although it is recognised that the service *mostly* runs on time...

> There was a replacement bus we were supposed to catch from the train station back to Llandudno Junction. But the place we were told to wait for the bus, by the train guard, wasn't the actual place where the bus was due to stop. A bus came past us on the opposite road, an hour late after being on the phone to Arriva Trains Wales.
> Llandudno, commuter frequent

– The service is neither frequent nor reliable *enough*

– Passengers experience frequent delays and short notice cancellations

The delays experienced by commuter passengers are often relatively minor, but frequent and irritating

– Many commuters are exhausted and frustrated by the inefficiencies of the service

– Replacement services are inadequate when issues do occur

– Reflecting a sense of helplessness, few bother to complain or to claim refunds

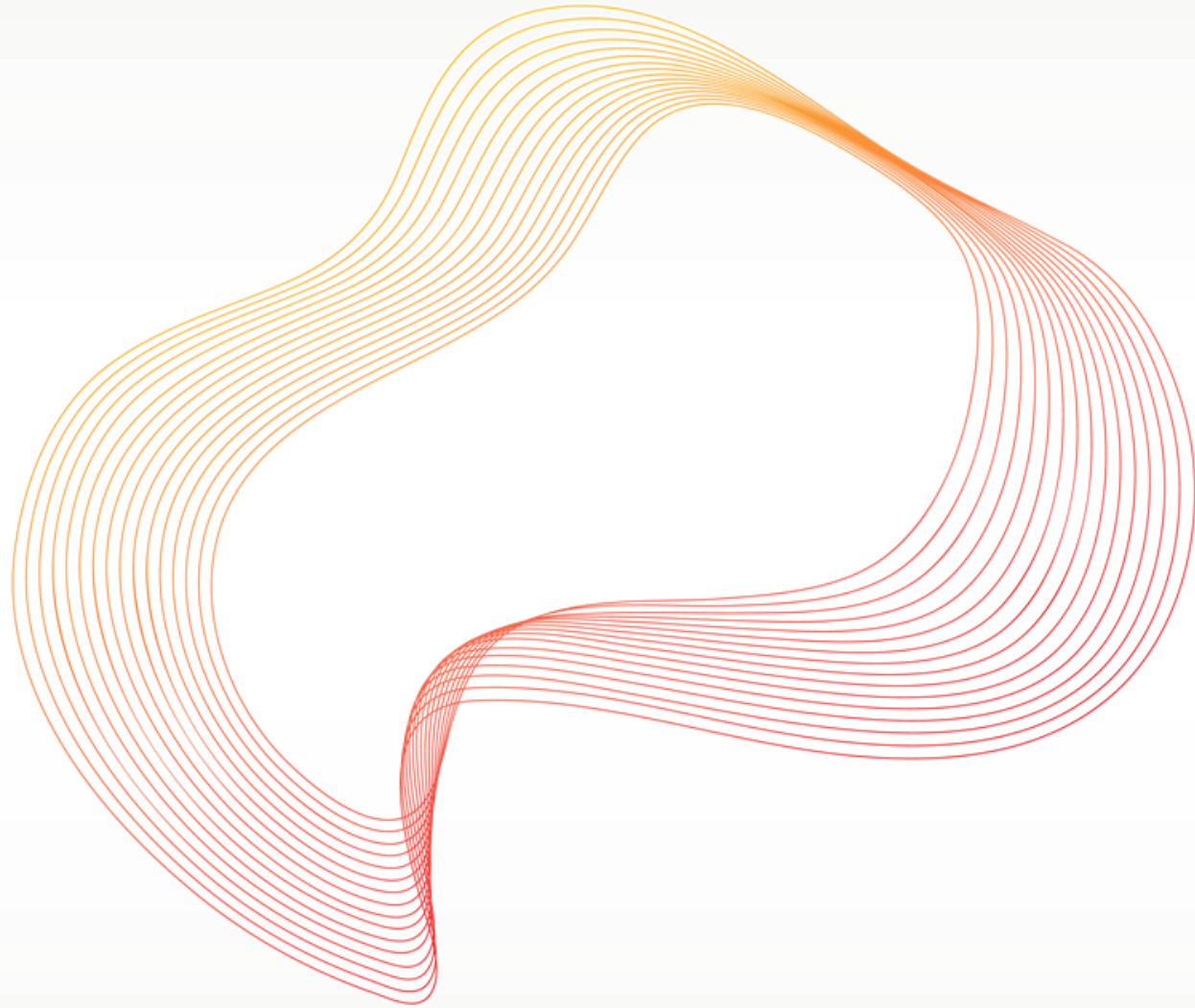**As would be expected, delays and disruptions are a less emotive issue for shorter distance leisure passengers.**

For longer distance business / leisure passengers, the issue is less about punctuality and more about journey length

– Journeys to the North of England and the Midlands seen as slow compared to other 'inter-city' services.

> I'm just fed up and dejected. It's like everyday there's something that happens and there's nothing we can do about it. I need to get to work but I have to put up with just constant delays and disruptions
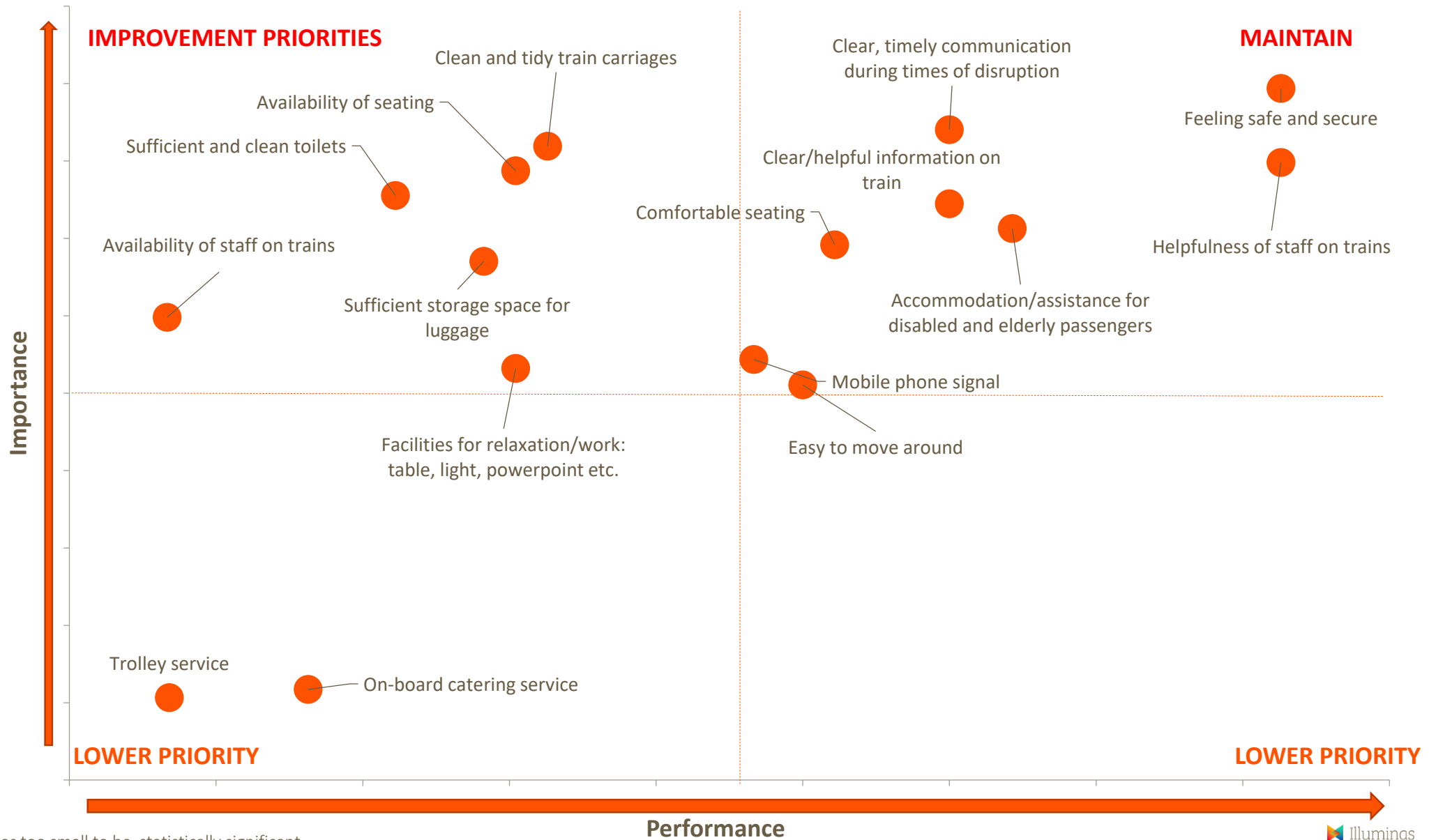> Llandudno, commuter frequent

> The ones going up to Merthyr they're really late. Yeah they're like 10, 15 minutes sometimes an hour late
> Cardiff, commuter frequent

> I had problems going from Newport to Stockport, my train was cancelled and I had to wait for an hour
> Swansea, leisure frequent

On train-experience

On-board priorities matrix

Importance (vertical axis) / Performance (horizontal axis)

IMPROVEMENT PRIORITIES

MAINTAIN

- Clean and tidy train carriages
- Availability of seating
- Sufficient and clean toilets
- Availability of staff on trains
- Sufficient storage space for luggage
- Clear, timely communication during times of disruption
- Clear/helpful information on train
- Comfortable seating
- Accommodation/assistance for disabled and elderly passengers
- Feeling safe and secure
- Helpfulness of staff on trains
- Mobile phone signal
- Easy to move around
- Facilities for relaxation/work: table, light, powerpoint etc.
- Trolley service
- On-board catering service

LOWER PRIORITY

LOWER PRIORITY

Overcrowding is *the key* issue for many passengers

Overcrowding is of paramount concern for commuters (but all passenger types suffer from it)

– Passengers on occasion can't board/ alight

– Overcrowding seen as a permanent fixture with no evidence of improvement

– Overcrowding at predictable times of peak demand (e.g. sports events) seen as inexplicable, even perverse

– Similarly, counterintuitive use of rolling stock: shorter trains at busy times; longer trains at quiet times.

> They need more carriages. Everyone's crammed into two carriages at Shrewsbury. They know it's a problem. It happens too often
> Machynlleth, leisure infrequent

Overcrowding recognised by passengers as the cause of many other on board problems:

– Too hot

– Dirty carriages

– Condition of toilets

– Difficult to buy a ticket on board.

> What's actually the capacity of these trains? Do you know? I'm worried for my safety when we have all these people squeezing on the rickety trains. I means the tracks are a bit flimsy as well so I don't trust it.
> Chester, commuter frequent

> The overcrowding is just awful. On days like Chester races there are thousands of people using that line and you can't move.
> Llandudno, leisure infrequent

All this means that passengers are suffering on their journeys with:

– High stress levels

– Anxiety

– Lack of safety

– Any additional encumbrance (luggage, small children, buggies etc.) seen as ratcheting up the stress levels.

> I wouldn't get on the packed train because I am too nervous you know, having them people around me. I panic then about could I get to the doors in time by my stop you know. Or is the train going to stop long enough for me to get out you know.
> Machnylleth, leisure frequent

Again, priorities for improvement are quite modest (and to passengers' minds, very straightforward); simply provide more carriages at peak times and during demand surges

The other key (and related) issue for passengers is the state of the rolling stock

Rolling stock is seen as dated and shabby:

– Design is old-fashioned

– Poorly maintained

– Often dirty (inside and out)

– Toilets 'unspeakable'; many will only use *in extremis*

– Trains too hot or too cold

– Insufficient seating

– Little space for buggies, wheelchairs and luggage

– Given the importance of capacity, little consideration is given to seating quality and layout

Again, the issues are most acute for commuters, but are experienced across the network

– Condition of the rolling stock reinforces perceptions of underinvestment and of Wales being the 'poor relation' as compared to other UK operators.

You know first thing in the morning when you get on the train you expect a bleachy smell. It smells like a bus stop!
Cardiff, commuter frequent

The toilets are disgusting, I wouldn't go
Cardiff, leisure frequent

Arriva trains seem quite grubby and old and they are just rundown.
Swansea, leisure frequent

Last summer though I saw people having panic attacks on trains when it was high heat, so it's not good
Chester, commuter frequent

Secondary concerns raised about passenger on-board experiences

Wi-Fi and phone signal

– Wi-Fi is seen as a recent and welcomed innovation to train travel

– Increasingly *expected* in any modern environment

– Better phone signal would be nice, but limitations of technology/ geography accepted.

On-board information

– Staff unavailable to provide information

– No point of personalised contact on-board the train.

Security

– Overall people do not feel unsafe on Arriva Trains

– But there are certain times of the day and occasions when passengers feel intimidated by other passengers

– These include incidents of anti-social behaviour that are mostly associated with intoxicated people (more common in urban areas)

– A lack of on-board staff compounded the issue

– CCTV makes customers feel more safe- but this is expected.

Catering

– Catering not a major issue, especially for commuters

– Largely seen as inadequate:

– Limited choice

– Poor quality

– Expensive compared to other and more typical retail outlets

– Seen as a luxury not associated with the Arriva brand.

> There's also things that you can add on and it sounds awful, Wi-Fi and stuff like that I don't feel it's (Arriva) adapted to the society we are now
> Chester, leisure frequent

> They need to make it safer at night, especially with women on the train. The last train, as a bloke I was with my mate and he's a big lad and you know they were just lunatics. They was drunk, they were abusive and there was eight or nine of them
> Swansea, leisure frequent

> [CCTV] is everywhere else anyway, isn't it so why not have it on the trains as well? I think that has to be expected in this day and age …
> Chester, leisure frequent

> Food on-board [should be] better value. It's so bad at the moment the food and it's that expensive
> Swansea, leisure frequent

These remedial issues are seldom a priority, and many passengers only want and expect 'the basics'

End to end journey summary- on-board journey

The big issues on-board

– The key issue for many passengers is overcrowding

– A second issue that is closely related to overcrowding is the poor condition of rolling stock

Overcrowding

– This is of paramount concern for passengers

– Viewed as a permanent fixture that will not be changed in current contract

– Passengers do not understand why more carriages cannot be added to peak services

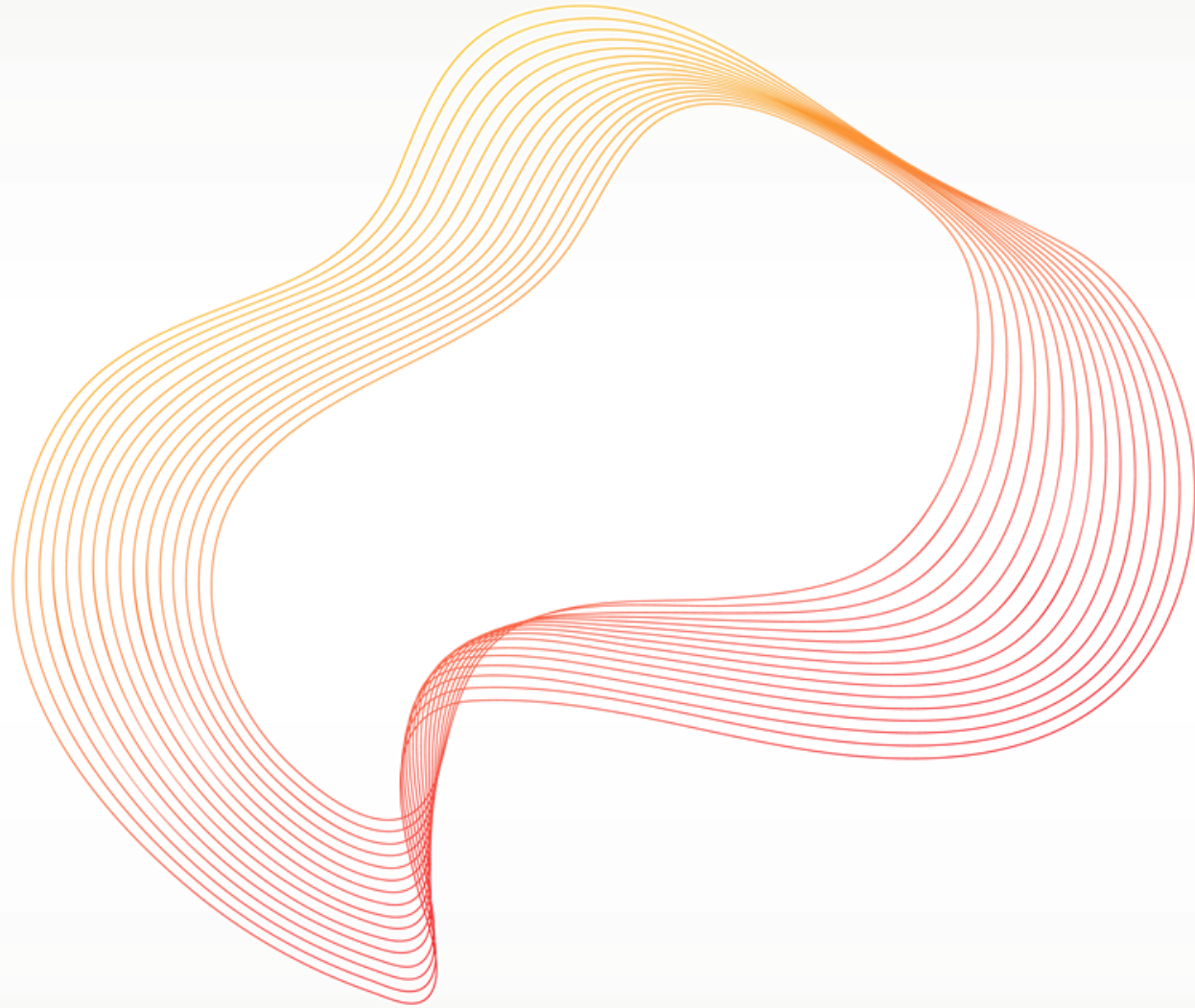– Overcrowding is seen as the cause of many issues that make for an uncomfortable journey (e.g. too hot)

Amenities

– Issues such as Wi-Fi, phone signal and catering are seen as secondary issues

On-board safety

– In general people do feel safe but there are certain times of the day that can be intimidating on trains

– Passengers cited a lack of staff as a cause for concern regarding their safety

Rolling stock

– Rolling stock is seen as dated and shabby, with old fashioned designs poorly maintained

– Toilets are of particular concern and space for luggage, buggies and wheelchairs is insufficient

> I caught a train in Exeter I think it was a couple of years ago and their trains were spotless. And they were bright and clean and they were really modern. You come to Cardiff and what you've got is other people's cast offs that are just about making it down the track and they're absolutely bogging.
>
> Cardiff, commuter frequent

Illuminas

Passengers with disabilities

Key barriers for disabled people using Arriva Trains Wales are lack of staff and overcrowding

Many disabled passengers rely on Arriva Trains Wales

– Many disabled passengers cannot drive

– Taxis are too expensive to use regularly

– Local buses present accessibility issues and are time consuming

– Disabled passengers rely on Arriva Trains Wales to go to work, see family and friends, as well as attend hospital appointments etc.

I had one (seizure) on Birmingham station and the guard on that train sat with me all the way to Shrewsbury and when they changed guards when I went from Shrewsbury to Aberystwyth the guard did his run with the tickets and then he came and sat by me. The other guard must have told him. I had a guard sat with me all the way to Aberystwyth, which I thought was wonderful
Machnylleth Interview

The key issues for disabled passengers are

– A lack of staff to assist them with their journeys

– Overcrowding presents unmanageable and dangerous conditions for people with a variety of impairments: visual, anxiety, impaired mobility, breathing and fatigue impairments etc.

– The confusing nature of ticketing can cause issues for those with anxiety and learning disabilities

– A lack of service provision to parts of South Wales means disabled passengers must find routes to central stations which can be difficult

– Situations of anti-social behaviour are more threatening to disabled passengers with mobility impairments because they cannot move away from danger independently.
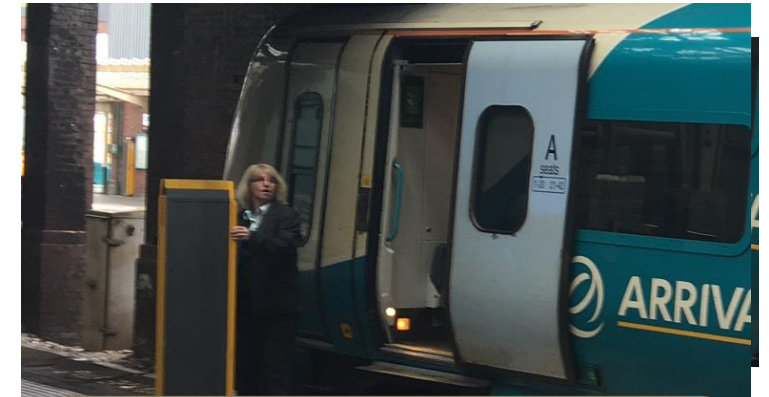
Swansea is the end of the line so they have got to get everyone off but they forget about me sometimes and I have been waiting on there for 20 minutes before they remember I am on the train. Only because the cleaners come past and they like see that I am there
Swansea Interview

Key improvements required

– An increase in staff at stations and on-board trains

– Increase amount of carriages on busy services

– Simplify ticketing process.

Value for money?

Rail is seen as cost-effective rather than good value

Commuters feel trapped and forced into rail travel due to the cost and congestion associated with driving

– Commuters have calculated the cost of owning a car, paying for petrol and parking compared with buying a season ticket on Arriva trains

– Commuters find that purchasing a season ticket is more cost-effective…. but only just

– Congestion in areas around urban centres such as Cardiff is seen to 'force' commuters on to rail.

Comparing Arriva Trains to other national rail services makes passengers (of all types) feel that they are not getting value for money

– Passengers perceive other rail services as offering a better service in terms of:

– Train frequency

– Quality of rolling stock

– Space on trains

Many therefore feel that they are paying the same amount as passengers using 'higher quality' services

– Passengers find it hard to justify the amount they're paying for the service they receive.

> They need to step it up I think, from what they're charging you like Virgin are okay price and they've got nice trains.
> Chester, commuter frequent

Variability in ticket prices is an indication to passengers that they are not receiving value for money, in particular long distance leisure travellers

– The thought of there always being a cheaper option had they booked with a different site, or at a different time of day means passengers feel they never reach optimum value

– The ticketing system fosters distrust in the industry.

> You know, in terms of ticketing, moving from one…say, Virgin to East Coast and so on has made it infinitely more complex. In terms of the pricing structures you can now get on websites which will work out the best way for you to get the cheapest way it might be, well, 50% cheaper
> Chester, leisure infrequent

Summary and Conclusions

Illuminas

Summary and conclusions
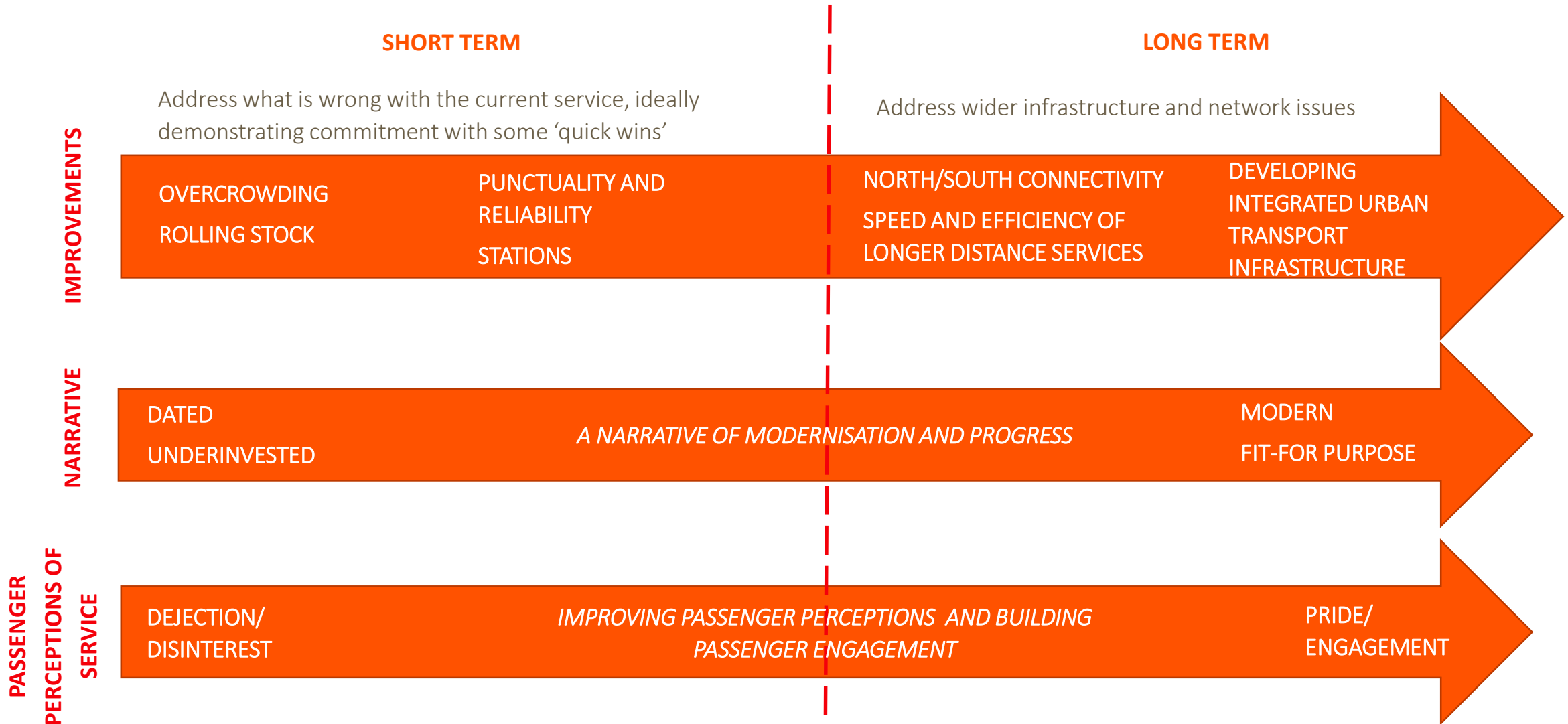
Passengers value the train service in Wales

– Passengers understand that Wales and Borders serves a diverse range of communities, many of which are relatively small and some quite isolated

– As such, their aspirations for the network are both realistic and modest – they do not expect (or want) an airline style transformation

However, at the same time, rail users perceive that the service they receive in Wales is in many ways 'second-rate' in comparison to what they see and experience elsewhere in the UK

– There is widespread belief that there is far greater investment into other rail services, regions and operators

– In the absence of evidence to the contrary, many feel that Wales is being neglected and left behind (both in terms of rail and wider transport provision within Wales)

– Passengers are thus often demoralised and pessimistic about their rail service

Priorities for improvement are primarily remedial: pulling service standards up to a par with those experienced elsewhere in the UK and providing Wales with a railway appropriate for 21st century Britain

The new Wales and Borders rail service must show demonstrable progress *and convey that narrative* to its passengers

Address what is wrong with the current service, ideally demonstrating commitment with some 'quick wins'

Address wider infrastructure and network issues

IMPROVEMENTS

OVERCROWDING

ROLLING STOCK

PUNCTUALITY AND RELIABILITY

STATIONS

NORTH/SOUTH CONNECTIVITY

SPEED AND EFFICIENCY OF LONGER DISTANCE SERVICES

DEVELOPING INTEGRATED URBAN TRANSPORT INFRASTRUCTURE

NARRATIVE

DATED

UNDERINVESTED

A NARRATIVE OF MODERNISATION AND PROGRESS

MODERN

FIT-FOR PURPOSE

PASSENGER PERCEPTIONS OF SERVICE

DEJECTION/ DISINTEREST

IMPROVING PASSENGER PERCEPTIONS AND BUILDING PASSENGER ENGAGEMENT

PRIDE/ ENGAGEMENT

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