# Wales and Borders rail service: consultation response

**May 2017**

transportfocus

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# Contents

# 1. Transport Focus

Transport Focus is the independent transport user watchdog. Our mission is to get the best deal for passengers and road users. 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 road users, to secure improvements and make a difference.

Transport Focus appreciates the open consultation on the future of the Wales and Borders rail service, particularly the efforts to engage directly with individual passengers as well as wider stakeholders.

# 2. Introduction

Transport Focus welcomes the opportunity to provide a rail passengers' perspective as the specification for the new Wales and Borders rail service is developed. When the requirements are established, it is vital that the needs of passengers using and paying for rail services are placed squarely at the heart of the contract.

Passengers' top priorities for the rail service are:

- capacity and frequency – increasing the overall number of carriages and optimising the availability of these appropriate to demand, considering service frequencies and train layouts, as well as how fares incentives might make a contribution to alleviating pressures
- value for money – encompassing the important service elements which drive this as well as the ticket price
- punctuality and reliability – at all stages of the train journey, not simply the timing of the train at its destination
- minimise and effectively manage disruptions – with planning and contingency arrangements putting passenger interests first
- provision of accurate and timely information – for all stages of the journey but especially during delays and disruption.

Alongside this, there must also be improvements to other elements of the journey experience. The next operator of the Wales and Borders rail service also needs to embed a genuinely customer-service focused culture at all levels and provide a personalised, rewarding passenger experience.

We are pleased to have engaged with Transport for Wales from an early stage in the rail service contract replacement process. We have used discussions to highlight key passenger issues and the findings of our research on a range of subjects.
This formal consultation response draws on three rich seams of Wales and Borders-specific data. Firstly, it combines knowledge and understanding drawn from passenger reports of their current journeys on Arriva Trains Wales services with information on passenger priorities for improvement. Read together these two complementary studies provide a unique perspective on passenger needs from the franchise and provide hard evidence to inform the decisions to be made for the future.

In addition, we also reference the findings of qualitative research into the views of Arriva Trains Wales passengers that we undertook in March 2017. More generally, we cite findings from our wider research into a range of issues that are important to passengers.

Our research, which will be detailed in further sections of this response, highlights the central importance to passengers of capacity, punctuality and value for money. These core needs must be the top requirements in the specification for the next franchise.

Our research into passenger understanding of, and desire for involvement in, the franchise process led to our emphasis on *Passenger Power!* and a call for more recognition of the passenger within the franchising system. Recent policy announcements have made welcome commitments to a greater emphasis on the quality of the passenger experience and enhanced arrangements for engagement and communication with passengers. It is important these promises are brought to life in the specification for the Wales and Borders rail service and that passengers can see these ideals manifest in the services they receive.

It is vital that, throughout the duration of the contract, the rail service operator remains responsive to changing passenger needs. This means not only that there must be a clear understanding of passenger requirements at the outset but that there is an ongoing emphasis on consultation and engagement with stakeholders and a set of output measures that reflect passenger satisfaction.

Any potential change of contact centre and complaints handling supplier should be well managed, with clear plans in place to ensure a smooth transition. Consideration should be given to the possibility that a new team, unfamiliar with the network and nature of cases they will be handling, might be initially slower at resolving complaints. Contingency plans should be in place to mitigate this and avoid any build-up or back-log of cases as a result of the transition.

There is an important role for the National Rail Passenger Survey (NRPS) in providing direct feedback from passengers using the services.

Transport Focus is committed to the promotion of passenger interests in the future decisions on the Wales and Borders rail service. We will continue to work closely with Transport for Wales, and with the bidders for the operation, to ensure that services address both current and evolving needs throughout the contract term.


## 2.1 Wales and Borders rail service consultation response

Many of the questions posed in the consultation are aimed at individuals or stakeholders, who will almost inevitably have a particular, often local, perspective and consequently their own set of priorities. It is appropriate that Transport for Wales and the bidders listen carefully to the views expressed. However, we would caution that conclusions must ultimately reflect the needs of all passengers whose lives will be impacted by decisions about the future of the rail service and the day-to-day operations which result from this, many of whom may live some way beyond the

network and others who will not be directly engaged with this consultation process, despite the outreach efforts.

As the independent passenger watchdog, our overarching responsibility is to provide an evidence-based response to the consultation, drawing on our research representing the views of a wide cross-section of the passengers who use the Wales and Borders rail service. As such, Transport Focus is adopting a strategic approach to this response and will focus largely on higher level issues.

Because various themes are inter-woven throughout the consultation document, we have grouped a number of questions, including those relating to the South Wales Metro, together to provide a more streamlined response. In the absence of question numbers we reference the relevant page number(s) in and summarise the key elements of the text to which our answers refer.

# 3. Wales and Borders rail service – passenger research and implications for the future

### 3.1 The Transport Focus evidence base

Transport Focus is committed to underpinning our work to get the best deal for passengers with a solid evidence base: we have a considerable body of research on matters that are important to passengers. Much of this is directly relevant to the specification for the next Wales and Borders rail service contract.

In this section we highlight the findings of our investigations into passengers' priorities for improvement and trust in the rail industry. We also draw on NRPS data for information about the current experience on the Arriva Trains Wales franchise. Read together these complementary studies provide a unique perspective on passenger needs from the franchise and provide hard evidence to inform the decisions to be made for the future.

Other research is cited as applicable within following sections.

### 3.2 Rail passengers' priorities for improvement 2014[1]

This 2014 study of passenger priorities allows us to compare the priorities of Arriva Trains Wales passengers against the national samples for Wales and Great Britain and also those of both business and leisure long distance passengers.

The priorities are shown as an index averaged on 100 (Figure 1). An index of 300 is three times as important as the average and an index score of 50 is half as important as the average. This information can also be shown graphically to illustrate just how much the relative importance varies between the factors (Figure 2).

We can see that there are two striking factors for Arriva Trains Wales passengers, with the top priorities of 'passengers always able to get a seat on the train' and 'price of train tickets offers better value for money' both more than four and a half times more important than the average factor. It is noteworthy that, contrary to the priority order nationally, getting a seat is the top priority for improvement for Arriva Trains Wales passengers, ahead of value for money.

The next group of important priority factors also feature what can be regarded as core elements of service. Passengers want frequent trains, good information about their services, improvements in punctuality and reliability and fewer disruptions. Other important features include well-maintained and clean train interiors and toilets.

Comparison by journey purpose highlights the differing priorities of passengers in Wales. 'Accurate and timely information available at stations' is the fifth highest priority for improvement for leisure passengers (Figure 3) while ranking 11th among business passengers. 'Journey time is reduced' is the seventh highest priority for

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[1] *Rail passengers' priorities for improvement*, Transport Focus, 2014

business passengers whilst this ranks 14th for leisure passengers. Figure 4 shows that 'Free Wi-Fi available on the train' is fourth priority for business long distance passengers compared to twelfth for leisure long distance passengers.

Summarising the findings, it is clear that the top priorities for improvement largely focus on the basic elements of the rail service – getting a seat, value for money, frequency, punctuality, managing delays and provision of information. Arriva Trains Wales passengers also rate improving the cleanliness and upkeep of the train above average in terms of priority level. This is not to say the remaining priorities are not important to the passenger experience, it is just that they are not as important to improve as the top ranking.

The database contains a wealth of information which can be analysed in many ways to explore how priorities vary by demographic and journey purpose, amongst other things[2]. We have a Wales-specific simulator, which is not published online but is available on request. We recommend its use to Transport for Wales and potential operators to enable a detailed understanding of the aspirations of passengers to apply to the specification and plans for the Wales and Borders network.

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[2] *Rail passengers' priorities simulator*, Transport Focus, 2014

## Figure 1. Passenger priorities for improvement: comparison Arriva Trains Wales, Wales overall and Great Britain overall (index and rank)

| | Arriva Trains Wales | | Wales | | Great Britain | |
|---|---|---|---|---|---|---|
| Passengers always able to get a seat on the train | 482 | 1 | 402 | 2 | 367 | 2 |
| Price of train tickets offers better value for money | 473 | 2 | 458 | 1 | 494 | 1 |
| Trains sufficiently frequent at the times I wish to travel | 231 | 3 | 238 | 3 | 264 | 3 |
| Train company keeps passengers informed about delays | 161 | 4 | 168 | 4 | 163 | 5 |
| More trains arrive on time than happens now | 140 | 5 | 150 | 5 | 178 | 4 |
| Accurate and timely information available at stations | 135 | 6 | 140 | 6 | 132 | 8 |
| Less frequent major unplanned disruptions to your journey | 123 | 7 | 133 | 7 | 161 | 6 |
| Fewer trains cancelled than happens now | 108 | 8 | 116 | 8 | 136 | 7 |
| Well-maintained, clean toilet facilities on every train | 107 | 9 | 106 | 9 | 89 | 14 |
| Inside of train is maintained and cleaned to a high standard | 106 | 10 | 106 | 10 | 93 | 11 |
| Connections with other train services are always good | 98 | 11 | 95 | 13 | 84 | 15 |
| Accurate and timely information provided on trains | 91 | 12 | 97 | 12 | 92 | 12 |
| Free Wi-Fi available on the train | 90 | 13 | 97 | 11 | 97 | 10 |
| Journey time is reduced | 77 | 14 | 84 | 14 | 105 | 9 |
| Good connections with other public transport at stations | 73 | 15 | 71 | 16 | 62 | 16 |
| Less disruption due to engineering works | 71 | 16 | 76 | 15 | 90 | 13 |
| Seating area on train is very comfortable | 69 | 17 | 67 | 17 | 59 | 17 |
| Train staff have a positive, helpful attitude | 52 | 18 | 54 | 18 | 47 | 18 |
| Station staff have a positive, helpful attitude | 50 | 19 | 53 | 19 | 46 | 19 |
| Sufficient space on train for passengers' luggage | 49 | 20 | 47 | 21 | 37 | 23 |
| New ticket formats available | 43 | 21 | 49 | 20 | 45 | 20 |
| Improved personal security on the train | 42 | 22 | 45 | 22 | 41 | 21 |
| Stations maintained and cleaned to a high standard | 40 | 23 | 41 | 24 | 36 | 24 |
| Improved personal security at the station | 39 | 24 | 42 | 23 | 38 | 22 |
| More staff available at stations to help passengers | 31 | 25 | 33 | 25 | 29 | 25 |
| There is always space in the station car park | 27 | 26 | 31 | 26 | 27 | 26 |
| Free Wi-Fi available at the station | 22 | 27 | 25 | 27 | 24 | 27 |
| More staff available on trains to help passengers | 22 | 28 | 23 | 28 | 20 | 28 |
| Reduced queuing time when buying a ticket | 20 | 29 | 21 | 29 | 20 | 29 |
| Access from station entrance to boarding train is step-free | 17 | 30 | 18 | 30 | 15 | 30 |
| Safe and secure bicycle parking available at the station | 12 | 31 | 12 | 31 | 10 | 31 |
| *Sample size* | *697* | | *750* | | *3559* | |

## Figure 2. Arriva Trains Wales passengers' priorities for improvement - relative importance

| Priority | Value |
|---|---|
| Passengers always able to get a seat on the train | 482 |
| Price of train tickets offers better value for money | 473 |
| Trains sufficiently frequent at the times I wish to travel | 231 |
| Train company keeps passengers informed about delays | 161 |
| More trains arrive on time than happens now | 140 |
| Accurate and timely information available at stations | 135 |
| Less frequent major unplanned disruptions to your journey | 123 |
| Fewer trains cancelled than happens now | 108 |
| Well-maintained, clean toilet facilities on every train | 107 |
| Inside of train is maintained and cleaned to a high standard | 106 |
| Connections with other train services are always good | 98 |
| Accurate and timely information provided on trains | 91 |
| Free Wi-Fi available on the train | 90 |
| Journey time is reduced | 77 |
| Good connections with other public transport at stations | 73 |
| Less disruption due to engineering works | 71 |
| Seating area on train is very comfortable | 69 |
| Train staff have a positive, helpful attitude | 52 |
| Station staff have a positive, helpful attitude | 50 |
| Sufficient space on train for passengers' luggage | 49 |
| New ticket formats available | 43 |
| Improved personal security on the train | 42 |
| Stations maintained and cleaned to a high standard | 40 |
| Improved personal security at the station | 39 |
| More staff available at stations to help passengers | 31 |
| There is always space in the station car park | 27 |
| Free Wi-Fi available at the station | 22 |
| More staff available on trains to help passengers | 22 |
| Reduced queuing time when buying a ticket | 20 |
| Access from station entrance to boarding train is step-free | 17 |
| Safe and secure bicycle parking available at the station | 12 |

100 = the average

## Figure 4. Passengers' priorities for improvement by journey purpose – Wales overall



Categories (top to bottom):
- Price of train tickets offers better value for money
- Trains sufficiently frequent at the times I wish to travel
- Passengers always able to get a seat on the train
- More trains arrive on time than happens now
- Less frequent major unplanned disruptions to your…
- Train company keeps passengers informed about…
- Fewer trains cancelled than happens now
- Accurate and timely information available at stations
- Journey time is reduced
- Accurate and timely information provided on trains
- Less disruption due to engineering works
- Free Wi-Fi available on the train
- Inside of train is maintained and cleaned to a high…
- Connections with other train services are always good
- Well-maintained, clean toilet facilities on every train

Legend: ■ Commuter ■ Business ■ Leisure

## Figure 3. Comparison of priorities for improvement between Business long distance, and long distance leisure and local leisure users in Wales



Categories (top to bottom):
- Passengers always able to get a seat on the train
- Price of train tickets offers better value for money
- Trains sufficiently frequent at the times I wish to travel
- Free Wi-Fi available on the train
- Journey time is reduced
- Train company keeps passengers informed about delays
- Well-maintained, clean toilet facilities on every train
- More trains arrive on time than happens now
- Inside of train is maintained and cleaned to a high standard
- Accurate and timely information available at stations

Legend: ■ Business Long dist. ■ Leisure Long dist. ■ Leisure Local

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### 3.3 NRPS and drivers of satisfaction and dissatisfaction

The NRPS, together with an analysis of the drivers of satisfaction and dissatisfaction, is a comprehensive source of information about passenger perceptions of the current franchise.

Evidence from the NRPS reinforces the importance of punctuality and reliability as one of the highest priorities identified for the franchise.

Tables detailing the NRPS headline factor scores for Wales and Borders and the five component building blocks are provided in Appendix 2. These include a comparison of scores with the sector or typology average and the typology best in class.

### 3.3.1 Drivers of satisfaction

Figure 5 shows the importance of the cleanliness of the inside of the train as a driver of satisfaction for Wales and Borders overall at 32 per cent, with punctuality in second place at 16 per cent. These two factors are even more important driving satisfaction for Cardiff and Valleys passengers at 42 per cent and 26 per cent respectively. This is noteworthy in how it differs with other operators, where punctuality and reliability is typically in first place by some margin.

Other important factors for the operator overall are the journey length, value for money and comfort of the seating area. For Cardiff and Valleys passengers, the ease of getting on and off the train also features strongly.

Due to changes in the definitions of the NRPS building blocks between Spring 2016 and Autumn 2016, we're not able to calculate the drivers of satisfaction at building block level using those two NRPS waves. But looking at the Autumn 2015 and Spring 2016 drivers of satisfaction, we can see that for passengers using North Wales and Borders services, punctuality and reliability is a much more significant driver of satisfaction, at 50 per cent. This follows a pattern much more similar to other operators than the overall Arriva Trains Wales picture.

Note: drivers analysis is unavailable for other building blocks due to changes to their makeup between Spring 2016 and Autumn 2016. To give some indication of relative values we have used previous waves for Autumn 2015 and Spring 2016 – shown in Figure 4.

**Figure 5. Drivers of satisfaction, NRPS Spring 2016/Autumn 2016: Arriva Trains Wales and Cardiff and Valleys building block\***

## Arriva Trains Wales drivers of satisfaction
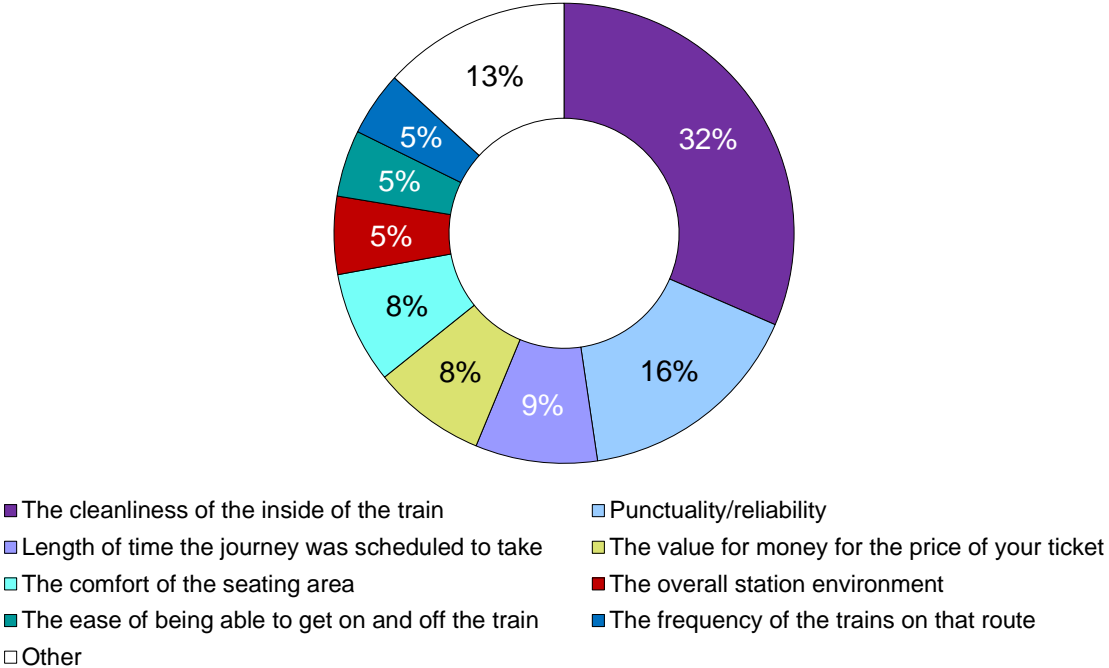


- ■ The cleanliness of the inside of the train
- ■ Length of time the journey was scheduled to take
- ■ The comfort of the seating area
- ■ The ease of being able to get on and off the train
- □ Other
- ■ Punctuality/reliability
- ■ The value for money for the price of your ticket
- ■ The overall station environment
- ■ The frequency of the trains on that route

\*Note: drivers analysis is unavailable for other building blocks due to changes to their makeup between Spring 2016 and Autumn 2016.To give some indication of relative values we have used previous waves for Autumn 2015 and Spring 2016 – shown in Figure 4.



- ■ The cleanliness of the inside of the train
- ■ The length of time the journey was scheduled to take (speed)
- ■ The comfort of the seating area
- ■ The ease of being able to get on and off the train
- ■ The choice of shops/eating/drinking facilities available
- ■ The attitudes and helpfulness of the staff
- ■ Your personal security whilst on board the train
- □ Punctuality/reliability (i.e. the train arriving/departing on time)
- □ The value for money for the price of your ticket
- ■ The overall station environment
- ■ The frequency of the trains on that route
- ■ Sufficient room for all the passengers to sit/stand
- ■ Your personal security whilst using that station
- ■ Cleanliness of the station

**Figure 6. Drivers of satisfaction, NRPS Autumn 2015/Spring 2016: Arriva Trains Wales building blocks**



| | |
|---|---|
| ■ The cleanliness of the inside of the train | □ Punctuality/reliability (i.e. the train arriving/departing on time) |
| ■ The overall station environment | □ The value for money for the price of your ticket |
| ■ Sufficient room for all the passengers to sit/stand | ■ The ease of being able to get on and off the train |
| ■ The frequency of the trains on that route | ■ Your personal security whilst on board the train |
| ■ The choice of shops/eating/drinking facilities available | ■ The length of time the journey was scheduled to take (speed) |
| ■ The comfort of the seating area | ■ The attitudes and helpfulness of the staff |
| ■ Facilities for car parking | □ Availability of seating |
| ■ Connections with other train services | ■ Up keep and repair of the train |
| ■ The space for luggage | □ How train company dealt with these delays |

### 3.3.2 Drivers of dissatisfaction

An analysis of the factors that drive passenger dissatisfaction also echoes the importance of key factors to passengers (Figure 7). The most significant driver of dissatisfaction is how well the train company dealt with delays at 34 per cent. Where delays are not dealt with well, passengers will be dissatisfied. The ease of being able to get on and off the train is the second highest driver of dissatisfaction, at 13 per cent, which may be attributable to concerns about capacity.

These factors are followed by how requests to station staff were handled, at eight per cent, and the helpfulness and attitude of staff on the train at six per cent. Together this means that, at 14 per cent, factors relating to the interaction with staff make up the second highest driver of dissatisfaction. This shows the importance of having helpful, informed and proactive staff in delivering a positive customer experience.

**Figure 7. Drivers of dissatisfaction, NRPS Spring 2016/Autumn 2016: Arriva Trains Wales**



■ How train company dealt with these delays
■ How request to station staff was handled
■ Sufficient room for all the passengers to sit/stand
■ Punctuality/reliability
□ Other

■ The ease of being able to get on and off the train
■ The helpfulness and attitude of staff on train
■ Your personal security whilst on board the train
■ The cleanliness of the inside of the train
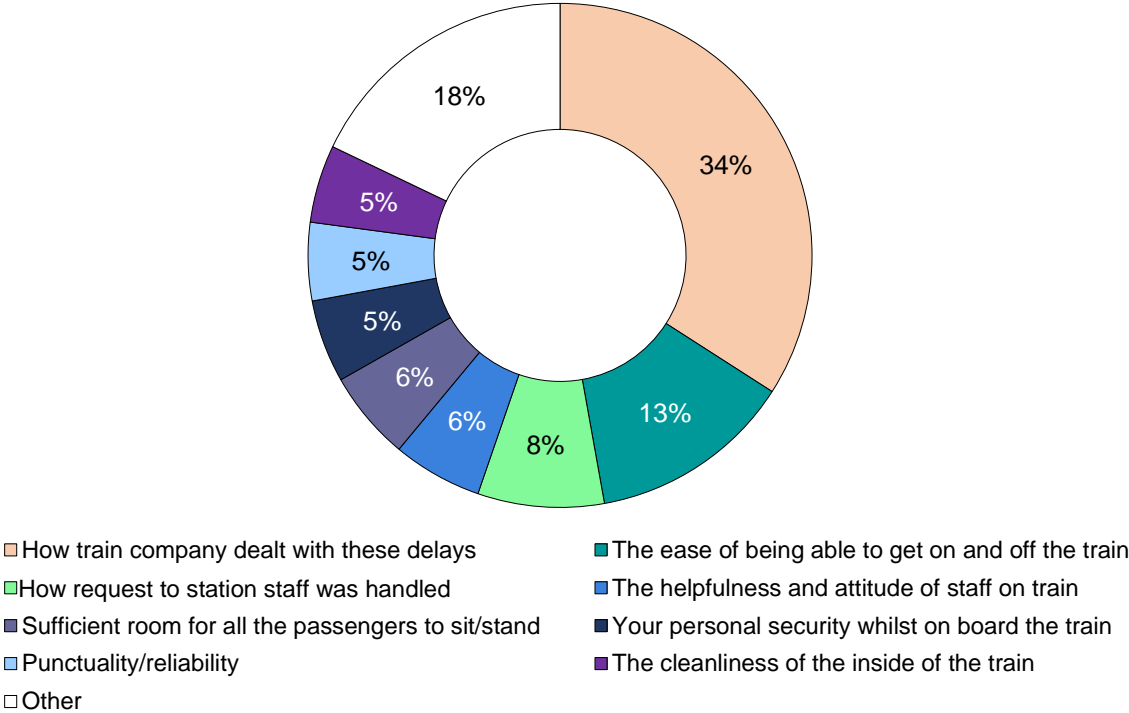
### 3.3.3 Satisfaction with value for money and the overall journey

A comparison between Arriva Trains Wales and the Regional sector shows that the operator has generally had relatively similar levels of overall satisfaction, but is more recently showing a slight decline. Since Autumn 2015 it has been a few points lower than the Regional sector average (Figure 8). The most recent results from Autumn 2016 NRPS show Arriva Trains Wales achieving 82 per cent compared to a sector average of 84 per cent.

Scores for satisfaction with value for money are considerably lower for both Arriva Trains Wales and the sector. The operator has been trailing the sector average by a few points for most of the past ten NRPS waves, but it has been showing a steady increase since Autumn 2013. In the Autumn 2016 NRPS Arriva Trains Wales was ahead of the sector average for satisfaction with value for money, by 61 per cent to 60, for the first time since Spring 2013.

**Figure 8. Arriva Trains Wales and Regional sector NRPS trends for satisfaction with overall journey and value for money**

## Overall journey satisfaction
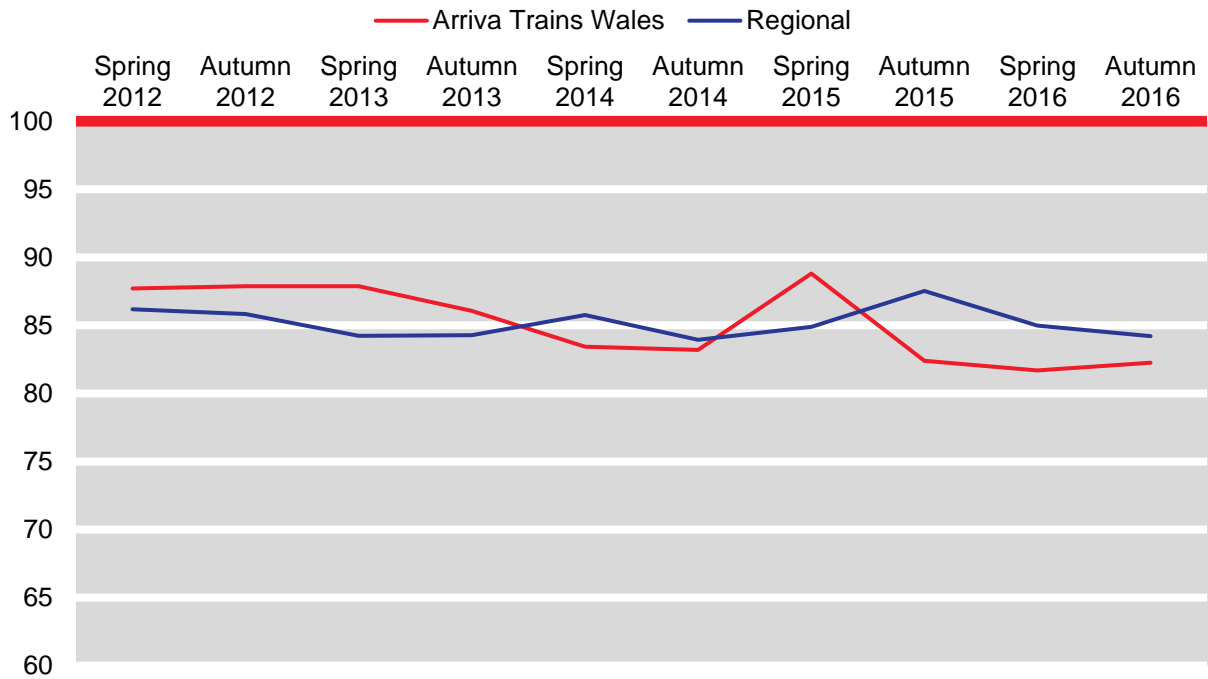


## Satisfaction with value for money
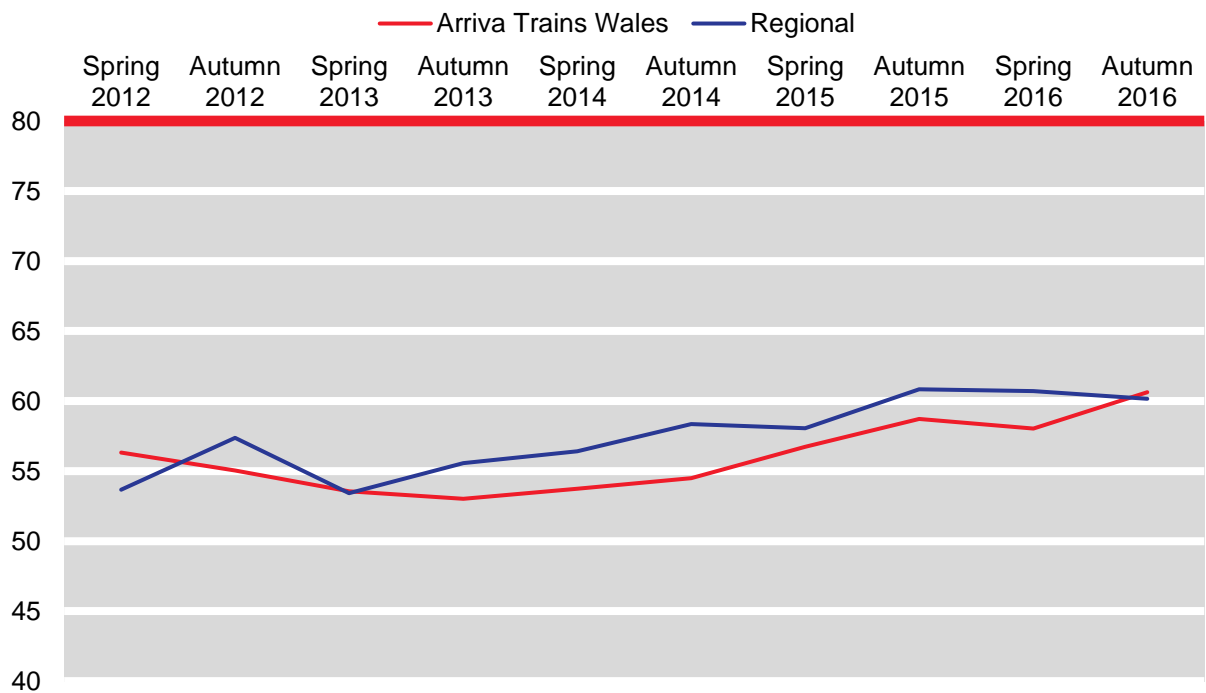
## 3.4 Qualitative research into passengers' experiences and aspirations for the future

We held focus groups with passengers from across the Wales and Borders network to gather further insight into their experiences of using Arriva Trains Wales and what they would like to see from their rail service in future.

In general, passengers find the service outdated, underinvested and falling behind the standard they see elsewhere on Britain's network. This applies to both stations and trains. Although they rate local staff highly, they find the current operator, Arriva Trains Wales, to be rather 'corporate' and 'distant' – and staff don't always seem to represent the operator. Passengers find the presentation to be a bit scruffy, with stations and trains in need of both a good clean and an overall upgrade.

Right across the network, people find capacity to be a concern. It's a regular issue at certain times for many passengers, for example for commuters and on Inter-urban services. But it's also acutely felt when special events happen, for example sports matches. Passengers feel that the operator knows about these issues, but doesn't seem to do anything to improve the situation.

Passengers find that the service is reasonably reliable – in that it rarely has major failures – but that there are frequent, niggling delays, for example of 10 to 15 minutes.

Whilst passengers appreciate staff and find them helpful where they are present, they generally believe there ought to be more staff at stations and on trains overall. This would not only aid information provision, dealing with issues and giving passengers a greater feeling of personal security, it would also make it easier to buy a ticket. This can be an issue for passengers at busy times on stations, for example, where there is only one ticket machine.

Passengers commented on 'gaps' in the network, especially from Mid-Wales to the South. It is also felt to be a sub-standard service proposition for longer distance travel, for example to the Midlands and North. There is little sense of an organising structure underpinning transport in Wales at a higher level and a lack of co-ordination/ integration within the area and across modes.

Overall, passengers find the service to be in need of an upgrade. On some routes they find the fares reasonably inexpensive, but that they still don't represent good value for money given their concerns about the quality of the service they receive.

## 3.5 Recommendations - top level priorities for the Wales and Borders rail service

Analysis of the passenger priorities for improvement, drivers of satisfaction/ dissatisfaction and the feedback from the passenger focus groups highlights a

number of factors that should be top level priorities for the next Wales and Borders franchise.

The primary requirements are for an absolute focus on the fundamentals to deliver improvements to:

- capacity and frequency – increasing the overall number of carriages and optimising the availability of these appropriate to demand, considering service frequencies and train layouts, as well as how fares incentives might make a contribution to alleviating pressures
- value for money – encompassing the important service elements which drive this as well as the ticket price
- punctuality and reliability –at all stages of the train journey, not simply the timing of the train at its destination
- minimise and effectively manage disruptions – with planning and contingency arrangements putting passenger interests first
- provision of accurate and timely information – for all stages of the journey but especially during delays and disruption.

Alongside this, there must also be improvements to other elements of the journey experience including:

- improvements on-board – with particular emphasis on the cleanliness and maintenance of the inside of the train and on-board toilets, layouts that facilitate luggage storage and passenger comfort and with high quality connectivity to facilitate access to information and enable a range of activities during the journey
- giving particular attention to improving perceptions of personal security on board trains
- enhanced station environments – that create easily navigable spaces providing the facilities and comfort that passengers value
- proactive and helpful staff available to provide information, reassurance and assistance to passengers
- seamless ticketing – which allows passengers to select and easily obtain the best and most appropriate fare for their journey delivered through the medium of their choice, and
- building trust with passengers, with clear and open communication.

The next operator of the Wales and Borders rail service also needs to embed a genuinely customer-service focused culture at all levels and provide a personalised, rewarding passenger experience.

These points, and other elements that require consideration in the specification and bidders' proposals, are developed in the remainder of this document. Where relevant, we provide enhanced details of key topics and our policy perspective on wider issues related to rail franchising.

# 4. Response to consultation questions

### 4.1 Train facilities and layout

Page 17. *In designing the trains to utilise the available space effectively, we want to understand what is important to you. Please rate each item from 1 to 6 (Please only use each number once, i.e give the most desirable 1, the least desirable 6 and rate the others in between)*

- *Luggage space*
- *Space for standalone tables*
- *Visibility from windows (seat alignment)*
- *Additional legroom*
- *Storage space for bicycles*
- *Dedicated Business Class facilities*

Page 17/18. *Consideration needs to be given towards balancing how we maximise space for passengers whilst accommodating cyclists with their bicycles, particularly at peak times. Please give your ideas on how we can achieve an appropriate balance.*

Page 27. *Thinking about the South Wales Metro, how much do you agree with each of the following (strongly agree, agree, don't know, disagree, strongly disagree)*

- *Toilets are not required on trains*
- *Toilets are not required on trains only if more are provided at stations*
- *There can be fewer seats if more, safe standing space is provided*
- *Bicycles (non-folding) should remain restricted during peak times*
- *All station platforms should have level access to trains.*

We know from our research that being able to get a seat on the train is the number one priority for improvement on Arriva Trains Wales services, at nearly five times the importance of the average factor[3].

Satisfaction with various aspects of the train layout is measured in the National Rail Passenger Survey (NRPS)[4], shown in

| | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| **Overall satisfaction with the train** | 75 | 68 | 76 | 80 | 83 | 80 |

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[3] *Rail passengers' priorities for improvement*, October 2014

[4] *National rail passenger survey*, http://www.transportfocus.org.uk/research/national-passenger-survey-introduction

| | | | | | | |
|---|---|---|---|---|---|---|
| **The space for luggage** | 63 | 56 | 60 | 63 | 72 | 71 |
| **Sufficient room for all passengers to sit/stand** | 70 | 65 | 62 | 71 | 88 | 68 |
| **The comfort of the seating area** | 72 | 62 | 67 | 80 | 79 | 83 |
| **The ease of being able to get on and off** | 78 | 74 | 77 | 84 | 79 | 82 |
| **The toilet facilities** | 47 | 39 | 44 | 57 | 57 | * |

**Figure 9**. Whilst this does not cover all of the elements listed above, we can use the data available to us to infer how passengers currently feel about the environment on the trains they use.

In the Autumn 2016 results, we can see that although 70 per cent of passengers are satisfied overall with the amount of space to sit or stand, this varies across the network. For Cardiff and Valleys it is low, at 65 per cent, and even lower for Inter-Urban services at just 62 per cent. But it rises to 88 per cent for services in North Wales and Borders. Satisfaction with luggage space ranges from 56 per cent (Cardiff and Valleys) to 72 per cent (North Wales and Borders). Satisfaction with the comfort of the seating area and with the ease of getting on and off the train follow a similar pattern. Satisfaction with toilet facilities on trains is a little above the Regional sector average, but still low at 47 per cent. Passengers on Cardiff and Valleys services tend to be rather less satisfied with toilets on board (39 per cent) than passengers using North and Mid Wales and Borders routes, but they are still more satisfied than the 'short commute' typology average of 29 per cent.

**Figure 9. Autumn 2016 NRPS satisfaction with factors relating to train layout.**

| | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| **Overall satisfaction with the train** | 75 | 68 | 76 | 80 | 83 | 80 |
| **The space for luggage** | 63 | 56 | 60 | 63 | 72 | 71 |
| **Sufficient room for all passengers to sit/stand** | 70 | 65 | 62 | 71 | 88 | 68 |
| **The comfort of the seating area** | 72 | 62 | 67 | 80 | 79 | 83 |
| **The ease of being able to get on and off** | 78 | 74 | 77 | 84 | 79 | 82 |
| **The toilet facilities** | 47 | 39 | 44 | 57 | 57 | * |

*Sample size is below 50

We apply multivariate analysis to establish the things that drive satisfaction and dissatisfaction. The comfort of the seating area is a driver of satisfaction for Arriva Trains Wales passengers, and the ease of getting on and off the train, and the amount of space to sit or stand, are drivers of dissatisfaction.

Our focus group research into the experiences of Arriva Trains Wales passengers, and their aspirations for the future of their rail service, corresponded with this. Passengers are unhappy with the amount of overcrowding, and sometimes perceive this to be at dangerous levels. This is especially an issue for commuter services, but is apparent across the network. There is a perception that the current operator is not responding to issues with severe overcrowding that they know happen repeatedly, or planning for events that are likely to cause overcrowding, such as sports matches.

The NRPS reveals that this is especially true among commuters. Just 55 per cent of commuters are satisfied with the amount of space to sit or stand, compared with 77 per cent of business travellers and 78 per cent of leisure users.

While overcrowding is the dominating issue from our research that needs attention for many Arriva Trains Wales passengers, they are also concerned about the quality, condition and presentation of the trains. Rolling stock is generally thought to be in need of renewal, especially where passengers make comparisons with other train operators. They find trains to be poorly maintained, unclean and the environment on-board to be uncomfortable – for example, too hot or too cold. In particular, passengers right across the network cite the toilets as being particularly unpleasant.

Ultimately, passenger views on the suitability of particular rolling stock set-ups are likely to be driven by personal circumstances related to the type of journey being made and the likelihood of a seat, or even standing room, being available when they get on.

Transport Focus has conducted several research projects on rolling stock design and, where capacity has proved to be a driving force for change, there are two areas that passengers consistently point to in terms of need for improvement:

- the design of the aisle and gangway running the length of the carriage
- the vestibule area and entrance to the carriage.

Research among Thameslink passengers[5] indicated that on busy peak trains the design should allow passengers who have to stand to do so in complete safety and as comfortably as possible. This could include improved provision of grab handles and rails. Passengers welcomed designs that showed wider gangways and aisles between each coach, as they were felt to greatly enhance freedom of movement along the train, and provided more standing space; but only if coupled with something to hold on to when doing so.

These findings were echoed in Merseyrail rolling stock research[6]. Congestion in the vestibule area was identified as an issue. Passengers are reluctant to stand in the aisles, primarily due to a lack of usable grab poles in this part of the carriage. The narrowness of the space also creates the perception that there is a risk of those who move down the aisle becoming trapped there. This creates concerns about being able to get off quickly enough and perhaps missing the intended stop, especially for those making relatively short journeys.

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[5] *Thameslink Rolling Stock Qualitative Research*, August 2008
[6] *Future Merseyrail rolling stock – what passengers want*, April 2014

Aspirations for the type and layout of trains will differ according to passenger characteristics across various routes. For example, in our Merseyrail rolling stock research, passengers expressed a preference for bay-style seating, whereas similar research among Tyne and Wear Metro passengers[7] revealed a preference for longitudinal-style seating, along the length of the carriage, although ideally a mix of options would be available.

Intuitively, we might expect vast majority of passengers to prefer seats aligned with windows to facilitate a view, and this likely to be especially relevant where tourism and leisure are prevalent uses.

We would advocate a policy towards bicycles that recognises the diversity of reasons why people travel on the Wales and Borders rail service. Retaining the ability to convey bicycles is important for some leisure users, but maximising the amount of space on the train has to be a priority for busy, commuter services. Satisfaction with facilities for bicycle parking at stations is low, at 58 per cent, compared with a regional sector average of 63 per cent. Improving this could encourage passengers to cycle at either end of their journey. Another possibility could be to look at improving the provision of bicycle hire at stations.

Overall, the best way of capturing the aspirations of the people who use the Wales and Borders rail service is with bespoke research at a point where the more detailed design of new or refurbished trains is being finalised.


### 4.2 On-board staff

Page 18/27. *Currently all Wales and Borders services (including ones that are in the South Wales Metro) have a second member of staff to help with security, safety, providing information and ticket sales. How important do you consider this service to be? Please tick one:*

- *Essential*
- *Quite important*
- *Not important*
- *No strong view*

Page 18/28. *Please give your ideas on what a second member of staff should focus on.*

Passengers value having visible, helpful and informed staff at all stages of their journey. The NRPS shows (Figure 10) that, at 84 per cent, Arriva Trains Wales passengers are fairly satisfied with the helpfulness and attitudes of staff on trains, but that where they are not satisfied it becomes one of the main drivers of overall dissatisfaction. Passengers are less satisfied with the availability of staff on trains, at 73 per cent overall and just 63 per cent in Cardiff and the Valleys.

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[7] *Tyne and Wear Metro: what passengers want from new trains*, February 2017

**Figure 10: Autumn 2016 NRPS satisfaction with factors relating to on-train staff**

| | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| The availability of staff on the train | 73 | 63 | 74 | 80 | 89 | 74 |
| The helpfulness and attitude of staff on train | 84 | 76 | 83 | 88 | 94 | 92 |

Our Wales and Borders passenger research showed that staff are helpful and provide a human face, but that they are insufficient in number. Where staff are present, they are highly valued. However, passengers cited a lack of staff presence, particularly on late evening services, as compounding concerns with safety and anti-social behaviour.

The research showed that ticket purchasing is made more difficult when no staff are available, and that the effects of disruption are worse when no staff are on-hand to provide advice. For disabled passengers, lack of staff is the main barrier to travel.

The impact on passengers of recent high-profile disputes about the role and responsibilities of a second staff member of staff on the train cannot be overlooked. Safety is of paramount importance. The safety regulator, Office of Rail and Road (ORR), has said that, as long as suitable equipment, proper procedures and competent staff are in place then Driver Only Operation is safe; rail unions disagree.

The precise duties of staff on board will clearly require negotiation and agreement in relation to the identified needs across the network; but what should not be overlooked is the value to passengers of their presence. Passengers value the information and assistance they provide, especially in times of disruption, and their presence also enhances feelings of personal security.

The culture and attitude among staff towards customer service is crucial to improving the passenger experience. This is driven not just by training front-line staff, but by ensuring that customer service is central to the way of working across the whole organisation. We believe that empowering frontline staff to proactively address passenger needs, and giving them the authority and tools to respond to issues where and when they arise, will do much to improve perceptions of customer service.

While many stations on the Wales and Borders network lack ticket retail facilities, it is important to ensure that passengers have an opportunity to either buy a ticket or collect a pre-booked ticket on the train.

## 4.3 Station facilities

Page 19/28. *Please mark the facilities you consider to be essential with an E and the facilities you consider to be desirable with a D, for larger stations and for smaller stations.*

*Station staff, Help points including emergency assistance, CCTV for personal safety, Covered waiting areas, Ticket purchasing facilities, Toilets, Parking, Retail spaces including food, Cycle parking, Bus stops, Click and collect points (for parcels and deliveries), Mobile data connectivity, Customer information points, Mobile charging points, Electric car charging points*

Page 19/29. *What other facilities would you expect to see at your station?*

All passengers should have access to effective shelter from the wind and rain (or sun when appropriate), seating and reliable information whilst waiting to catch the train. We know from our research that passengers would also like to be able to access toilet facilities, waiting rooms and refreshments, but are generally pragmatic about what is realistic to offer at smaller stations.

We would like to see bidders propose a classification system for stations, identifying an appropriate offer of facilities for each type. Classification should be based on a range of measures, including not just current footfall, but also passenger type and future demand, as well as other local provision. It should be able to adapt over time as local demographics and journey patterns change. Using data from the NRPS, we have analysed what drives overall satisfaction with the station. Figure 11 shows the drivers of satisfaction for Arriva Trains Wales passengers, and Figure 12 shows a GB-wide comparison between small, medium and large-footfall stations. We can see that passengers want a station that is clean and well-kept. It is important to provide decent shelter from the elements, and good information about the train service. Passengers appreciate a staff presence, not least to help them feel safe and secure using stations. At larger stations passengers expect a decent range of facilities and services. We know from our qualitative research with Arriva Trains Wales passengers that people want access to toilet facilities at stations where possible.

**Figure 11. Arriva Trains Wales drivers of overall satisfaction with the station (Spring 2016/Autumn 2016 NRPS)**



Pie chart segments:
- 23%
- 20%
- 16%
- 14%
- 9%
- 8%
- 5%
- 6%

Legend:
- ■ The upkeep/repair of the station buildings/platforms
- ■ Cleanliness of the station
- ■ The provision of shelter facilities
- ■ Provision of information about train times/platforms
- ■ Your personal security whilst using that station
- ■ Ticket buying facilities
- ■ The availability of staff at the station
- □ Other
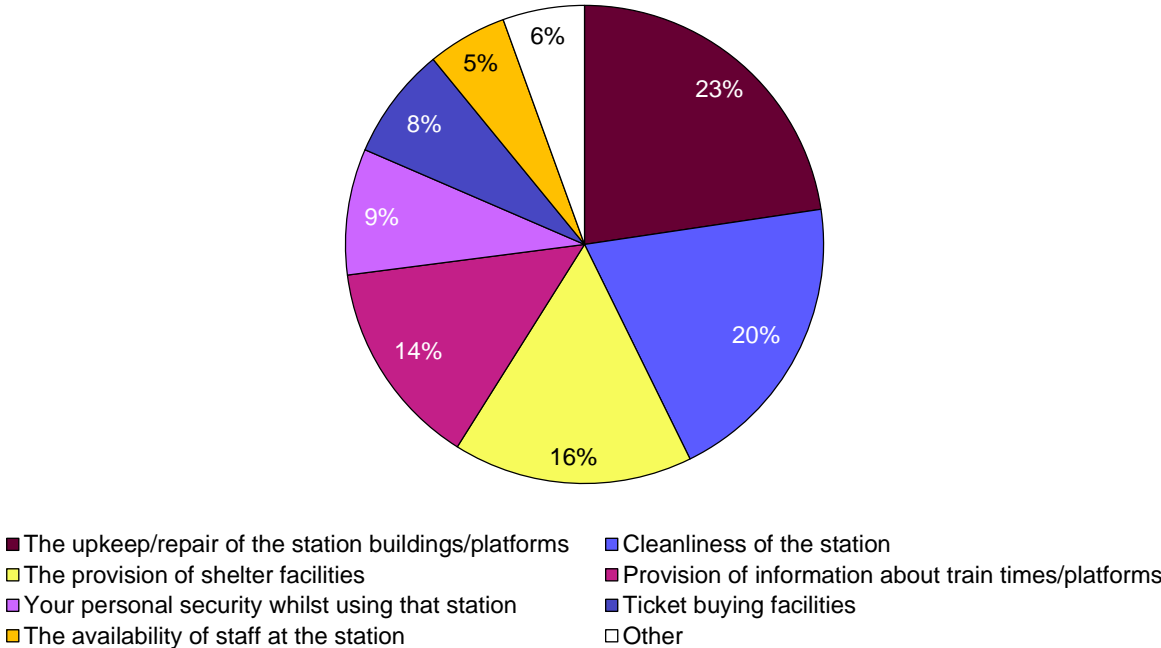
**Figure 12. GB-wide drivers of satisfaction with the station, by station size (Spring 2016/Autumn 2016 NRPS)**



| Station size | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Large | 28% | 23% | 19% | 12% | 8% | | | |
| Medium | 14% | 27% | 20% | | 12% | 5% | 7% | 5% |
| Small | 6% | 22% | 24% | 13% | 10% | 8% | 10% | 6% |

Legend:
- ■ Provision of information about train times/platforms
- ■ The upkeep/repair of the station buildings/platforms
- ■ Cleanliness of the station
- ■ The facilities and services at the station
- ■ Your personal security whilst using that station
- ■ Availability of seating
- ■ The provision of shelter facilities
- ■ Ticket buying facilities
- ■ The availability of staff at the station
- □ Other

We know that passengers place a strong value on having access to helpful, informed and empowered members of staff. They play a key role in offering assistance, providing information and helping passengers feel secure.

In 2014 we carried out priorities for improvement research. Keeping passengers informed during delays, and providing accurate and timely information at stations emerged as the fourth and sixth priorities for improvement overall.

As part of the project, we explored passengers' priorities for improvement at stations both in terms of what they wanted to see improved and what existing facilities they wanted to be provided. Passengers' top priorities for improvement were seating, toilets, litter bins, shelter and waiting rooms. Their top priorities for provision were free Wi-Fi, toilets, litter bins, cash points and waiting rooms. There is considerable variation by size of station – for example, improving shelter facilities is the top priority for improvement at low-footfall stations.

### 4.3.1 Current satisfaction with stations

The NRPS reveals that satisfaction with stations on the Arriva Trains Wales network falls well behind the regional sector average across a range of factors. Overall satisfaction stands at 75 per cent against a sector average of 81 per cent. Several factors related specifically to stations (overall environment, choice of retail/refreshment facilities, personal security) form a drivers of overall satisfaction for Arriva Trains Wales passengers.

**Figure 13. Autumn 2016 NRPS satisfaction with factors relating to station facilities**

|  | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| Overall satisfaction with the station | 75 | 72 | 84 | 78 | 75 | 76 |
| The overall station environment | 67 | 63 | 74 | 70 | 73 | 63 |
| Provision of shelter facilities | 70 | 65 | 75 | 74 | 78 | 67 |
| Availability of seating | 56 | 51 | 56 | 62 | 76 | 48 |
| Your personal security whilst using the station | 69 | 62 | 77 | 76 | 80 | 64 |
| The facilities and services at the station | 49 | 36 | 63 | 63 | 55 | 54 |
| The choice of shops/eating/drinking facilities available | 38 | 28 | 55 | 53 | 36 | 40 |

But satisfaction with these important factors is low. Figure 13 shows that 67 per cent of Arriva Trains Wales passengers are satisfied with the overall station environment,

against 76 per cent for the regional sector overall. Satisfaction with the facilities and services at stations is especially low, at 49 per cent, against a sector average of 55 per cent, and this falls to just 36 per cent for Cardiff and Valleys routes. Improving this could increase overall journey satisfaction.

Overall, satisfaction with stations on the Cardiff and Valleys routes is lower than elsewhere on the network.

Our research among Arriva Trains Wales passengers revealed that people often find stations to be rather neglected, and behind the level of provision and upkeep that they might find elsewhere in Britain. Key stations such as Cardiff and Swansea are seen as 'shabby' and in need of regeneration. Smaller stations have very little amenity, with some places even lacking adequate shelter from the weather. Many, especially in South Wales, are seen to be intimidating at night, particularly where lighting is poor.

### 4.3.2 Station investment

While Transport Focus is supportive of the principle of funding streams allocated to specific purposes, it is important that passenger needs are central to the investments made.

Resources should be directed to the things that users of specific stations, and the rail services from them, value. To this end, proposals should include information on how the bidder will address the findings of research into passenger requirements and perceptions of stations, including NRPS satisfaction scores.

Transport Focus research conducted at Clapham Junction, Barking and Luton stations following the *Better Rail Stations* report[8] shows that at individual stations there are often specific areas of improvements that passengers want to see and that priorities can vary according to location and circumstance. Bidders should seek station feedback from local passengers and Community Rail Partnerships (CRPs) to identify aspirations for specific locations, and to gather information about relevant accessibility issues.

Other research looked at passenger satisfaction at stations benefitting from investment under the National Station Improvement Programme[9]. The positive impact of doing work at each of the stations was clear to see. The factors with most impact on overall passenger satisfaction were: improvements to the appearance of the booking office, the condition of platform shelters, the footbridges, ticket sales points, the main entrances/exits, and the waiting rooms.

The Wales and Borders rail service specification should require bidders to commit to ensuring that minimum standards - appropriate for the size, footfall, location and reflecting local passenger aspiration - are delivered and maintained at all stations.

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[8] *Better Rail Stations*, Department for Transport, November 2009, identified ten of the worst category B stations in the country. Clapham Junction, Barking and Luton, all featured in that list.
[9] *National Station Improvement Programme – summary report*, January 2010

Cycles of investment should be planned throughout the life of the rail service contract to maintain and progressively improve upon the station environment and facilities.

We suggest consideration is given to specifying a rolling programme of steady improvement to stations, on a line-by-line basis, to concentrate benefits in a way that should create a bigger impact than spreading improvements around randomly. This should also create greater synergies in the works.

In addition to using all available industry funding schemes, the new operator should also look beyond these and work with stakeholders and other partners to seek opportunities to bring in funding for allied improvements where these address wider objectives such as promoting economic development, improving transport integration, increasing safe access or enhancing the public realm. Holistic approaches to investments in and around stations are likely to deliver better results and increase efficiency and value.

### 4.3.3 Passenger information requirements at stations

The first requirement for passengers at the station is navigation and wayfinding. Signs and directions from all entrances should make it simple to find key locations such as ticket facilities, shops, toilets, and, of course, platforms and trains.

Research with passengers at Euston and Edinburgh Waverley stations highlights the importance of real-time information about train times, platforms and information during disruption, which were the top two priorities for improvement in both studies[10]. Beyond actually locating the train, other information - such as length of time the train will be at the platform and where to stand for easy access to the carriages - can both assist passengers and contribute to calm, smooth boarding and therefore safe operations and timely departures.

The way the industry manages delays is the biggest single driver of rail passenger dissatisfaction; the key to improving this is through the provision of accurate, timely and consistent information.

Despite the increasing use of technology many passengers still only tend to find out about disruption once they have arrived at the station. Passengers need to know what is happening, how long the delay will be, what the problem is, and what alternatives there might be, so that they can make other plans if necessary. Communications need to be up-to-the-minute, as lack of information contributes to stress and a sense of powerlessness.

Customer Information Systems (CIS) at stations play an important part in keeping people informed. Our work shows that CIS screens generally perform well in meeting passengers' needs because they provide confirmation of departure time, platform number, destination and calling points and act as a 'focal point' for passengers entering a station[11].

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[10]*Improving Euston Station*, October 2011 and *Edinburgh Waverley Station Improvements Research*, June 2014
[11]*Passenger information screens at railway stations*, November 2014

Passengers also welcome what is seen as a broadly 'standard' approach to CIS design across the network – something that provided a degree of reassurance/continuity when in an unfamiliar station. Real-time information provision at all stations should be a core requirement of the rail service.

Announcements are also important. However they are often felt to be automated and inaccurate, and sometimes may be at odds with the display boards. Help points can also play a useful role, although more information about their purpose may encourage greater usage as some passengers are uncertain about their function and thus less inclined to use them.

Staff play a vital role in information provision. It is important that, at all times when trains are running, passengers can have access to someone who can provide useful and appropriate information, particularly during disruption. Staff are thought to be too often 'out of the loop', not having access to the up-to-the-minute information that some passengers have (via smartphones)[12]. Staff must have the appropriate technology to enable them to provide information but this must be accompanied by suitable training so they can use that technology confidently and effectively and communicate well with passengers.

More generally, bidders should be required to propose strategies that maximise the effective use of evolving technology to consistently improve the information available to passengers at stations.


### 4.3.4 Staffing at stations
The pressure on the industry to reduce costs inevitably places a focus on the overheads associated with staff. However, Transport Focus is concerned that the very significant roles staff play and the value passengers attach to a visible staff presence, especially at stations, is not overlooked[13]. We urge that specifications are mindful of the many benefits derived from staffing and that bid evaluation ensures sufficient credit for initiatives to make proposals viable.

Changes to retailing practices have seen a trend towards moving staff out from behind the glass of the ticket office and into sometimes multi-functional roles on the station concourse. Transport Focus has no intrinsic objection to this evolving role, provided that passengers still have access to the full range of tickets, it does not take any longer to buy a ticket and that the current regulatory safeguards (in other words changing the hours that staff are present) are retained. It must not become a back-door means to cutting staff.

Passengers with assistance needs are particularly dependent on staff to deliver the help they require and to fulfil requests made through Passenger Assist. Disability awareness training should be considered for all staff and regarded as essential for anyone in a passenger-facing role.

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[12] *Passenger information when trains are disrupted*, September 2014
[13] *Passenger attitudes towards rail staff*, February 2016

Many station facilities and services are available only while staff are present. Feedback indicates significant concern about the lack of access to toilets and waiting rooms if staff are withdrawn from stations or hours are significantly reduced.

Passengers also cite the lack of staff as a major reason for their feelings of concern over personal security and consistently identify a visible staff presence as being important to providing reassurance to those travelling on the railway. It is vital that those staff receive the appropriate training both in terms of managing the station environment and personal security within it, and customer service.

The industry needs to give serious consideration to how it can best use staff and make best use of the different types of complementary policing available to it. Our research sets out passengers' concerns in more detail[14]. The specification should include a requirement to set out how these issues will be addressed across the network.

It is important that staff are trained, managed and supported to deliver the highest possible levels of customer service. Expectations of customer service continue to rise as standards do across the range of passenger experience, both within and beyond the rail industry.

### 4.4 Station management

Page 22/23. *Do you consider that the transfer of station management (from W&B Rail Service to other operators) should take place for some or all of these stations: Shrewsbury, Chester and Hereford? If so, please explain, focusing on the perceived benefits for passengers.*

Page 23. *Should the smaller stations in England currently run by Arriva Trains Wales stay within the Wales and Borders rail service? If no, please specify which might transfer, to which, and what the perceived benefits would be.*

In our research among Arriva Trains Wales passengers, there was a clear view that it is sensible for the operator of the majority of the train services through the station to also run the station. It is important that that feedback from passengers regarding stations is heard, and that mechanisms and funding are in place to ensure that points raised are acted on, so as to meet the needs of all passengers using stations on the Wales and Borders network – not just the ones in Wales. The operator should represent and engage with passengers and stakeholders from across the whole network.

It is also important to ensure that the operator of the Wales and Borders rail service collaborates with other franchise operators and local partners/stakeholders to

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[14]*Passenger perceptions of personal security on the railways*, May 2016

improve the overall experience of using stations and provide a consistent service right across the network.

## 4.5 Community involvement in stations

Page 20. *In what way could your community be involved in your local station?*

Passengers expect the stations they use to be welcoming and attractive. Local involvement, typically by 'friends of' groups and supported by the railway industry and local government, can achieve significant improvements in the attractiveness of stations. It can also stimulate community engagement with the railway and promote the use of redundant station buildings by local businesses and organisations, including those involved in local tourism.

Educational schemes, event sponsorship and engagement with local businesses are examples of ways in which the railway can be brought closer to local communities and potentially drive patronage. More ambitious business models are also developing in other parts of the rail network to create commercial conditions in a way that enables them to prosper and to deliver benefits to the regional economy.

Potential opportunities to enhance service provision can be realised through funding channels and sponsorship that may not otherwise be available to train operators – from county councils, Local Enterprise Partnerships where relevant, local businesses and match funding.

Community Rail Partnerships (CRPs) can also play an effective role in building links and increasing passenger numbers, particularly where there is funding to support dedicated officers to pursue a range of activities. They can bring distinctive attributes to local rail compared with other parts of the national rail network, including:

- creating a sense of involvement

- information and marketing activities

- implementing local schemes

- providing a focus for investment.

The 2015 report on the Value of Community Rail Partnerships, including the Conwy Valley Line from Llandudno to Blaenau Ffestiniog, shows that they can be extremely successful[15]. Focusing on the regional and local level, results can be seen in increased footfall at stations along CRP lines. The report goes on to show that the costs of running CRPs are less than the value of additional revenues earned by their lines and they therefore present a commercial case.

The Value of Community Rail Partnerships report also shows high level sustained year on year growth in passengers travelling on community rail lines and local rail services in recent years with community rail routes growing by 2.8 per cent each year more than regional lines.

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[15] *Value of Community Rail Partnerships*, Association of Community Rail Partnerships, January 2015

Educational schemes which link with local schools through art projects using local artists, organising visits to the station and links with older volunteers can successfully raise awareness of the railway, familiarity with local services and by linking curriculum-based learning into rail projects, promote future local rail use with the children.

Event sponsorship is a useful tool in encouraging infrequent or new users. Local tourism is enhanced through promotion of walks which start and finish at local train stations, publicised through leaflets and websites. These initiatives can also support service enhancements. Abbey Line Community Rail CRP has developed a programme of walks[16] that start and finish at stations to attract people to use the railway.

Involvement of local businesses is achieved in a variety of ways. The strongest way of getting firms involved (particularly larger ones) is where there is commercial benefit through joint promotions, sponsoring projects or environmental initiatives such as green travel plans which show the company in a positive light.
More ambitious business models are also developing in other parts of the rail network to create commercial conditions in a way that enables them to prosper and to deliver benefits to the regional economy.

In its report on Innovative Community Uses for Railway Stations and Land[17], the Association of Community Rail Partnerships (ACoRP) highlights; 'many success stories that can be replicated and learnt from, across Britain and beyond. These successes are very much down to voluntary and community efforts, but would not have been achieved without a supportive industry framework and enthusiasm and understanding from individuals and organisations in the rail industry. The challenge now is to ensure barriers are removed and the path set for more communities to reconnect with their stations and railways, to bring more buildings and land back into community use.'

The report cites a number of examples of innovation at Wales and Borders stations:
- Llandovery Station Cafe is run by a team of volunteers from Friends of Llandovery Station, using the former booking hall area. With help from the Railway Heritage Trust it was restored to a high standard and the lease is held by the Heart of Wales Line Development Co.
- At Leominster, Fetch Theatre has taken over unused rooms on the northbound platform. It is a touring theatre company producing a highly visual style of theatre incorporating puppetry and mask work. It is committed to bringing theatre to audiences that may not have easy access to the arts. They have a sub-lease from the local town council, which leases the building from Network Rail.

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[16] http://www.abbeyline.org.uk/walks.htm
[17] *Community Stations: innovative community uses for railway stations and land*, Association of Community Rail Partnerships, April 2017

- At Borth, between Aberystwyth and Machynlleth, part of the substantial station building is a volunteer-run museum recording the history of the railway in this part of Ceredigion.
- The appended case studies also feature the new Llandeilo 'station hub'; designed to create affordable space for community-managed facilities and local businesses in a site where no suitable buildings are available. The project won an award at the ACoRP national community rail awards in 2016. It is a modular, 6m x 2.7m transportable building with a covered aisle, leading to a modern composting toilet. It was built using sustainably sourced Welsh wood and the idea was to create a space that could be run on a tiny budget by and for the community, improving the station for everyone. The design features a rainwater harvesting system and optional renewable energy unit to create a stand-alone, multi-purpose mini-building. In late autumn 2016, Arriva Trains Wales trialled a small freight service, collecting locally grown vegetables from the Gower via Llanelli and transporting it to the Llandeilo Hub for distribution.

The new Northern Rail franchise includes a commitment to support community rail, which is part of the Department for Transport (DfT) Community Rail Development Strategy. This includes:
- discussion of aims and needs with CRPs and funding required to achieve them
- collaboration with CRPs to implement a station adopters' scheme
- establishing and co-ordinating a Community Rail Executive Group to foster collaboration and provide guidance for CRP policies and plans
- committing £600,000 per year in support of CRPs
- agreeing service level commitments with each CRP
- producing an annual Community Rail Report[18] for the Secretary of State, giving an update on progress and future initiatives.

The DfT and the Association of Community Rail Partnerships (ACoRP) have established a fund to help to support initiatives on designated community rail routes, to support projects identified as:
- marketing Campaign
- station Improvement
- community Engagement
- passenger Information
- research Project.

Projects are assessed against one or more of four objectives of the 2007 Community Rail Strategy:
- increasing revenue
- reducing costs
- increasing community involvement in lines

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[18] *Community Rail Report*, Northern, August 2016

- stimulation of economic and social regeneration.

Funding of £102,000 was provided for projects in 2015/16[19], with additional match funding of £245,000.

The service specification process should consider what scope there might be for support of existing, or development of new, CRPs across the network. They should require bidders to make appropriate provision in their proposals.

### 4.6 Getting to the station

Page 20. *In order to maximise their use by train users, would you be prepared to pay for parking if this funded improvements in car parking capacity, quality and security?*

Page 21. *What are the difficulties you face in terms of travelling on more than one type of service – e.g. changing trains, changing from bus to train?*

The Wales and Borders network covers a diverse area, and includes many rural stations with a wide catchment area. Given the nature of the geography, driving is a necessity for many people and, in the absence of convenient alternative options, using the train means also driving to the station and either parking or getting dropped off. In 2007 we published research into getting to the station, conducted in the East of England[20]. It shows that many passengers drive to and park at the station. Where parking becomes more difficult, due to a lack of spaces or the cost becoming "unfair", they would simply either drive to the next station or make the whole journey by car. This demonstrates that the availability of parking, at a price people are willing to pay, is a significant factor in the decision of people who might otherwise drive whether to take the train.

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[19] https://acorp.uk.com/wp-content/uploads/2015/09/15-DCRDF-report-2015-16-Int-Final.pdf
[20] *Getting to the station*, March 2007

**Figure 14. Methods of transport used to get to the station where started journey, Spring 2016 NRPS – Arriva Trains Wales**
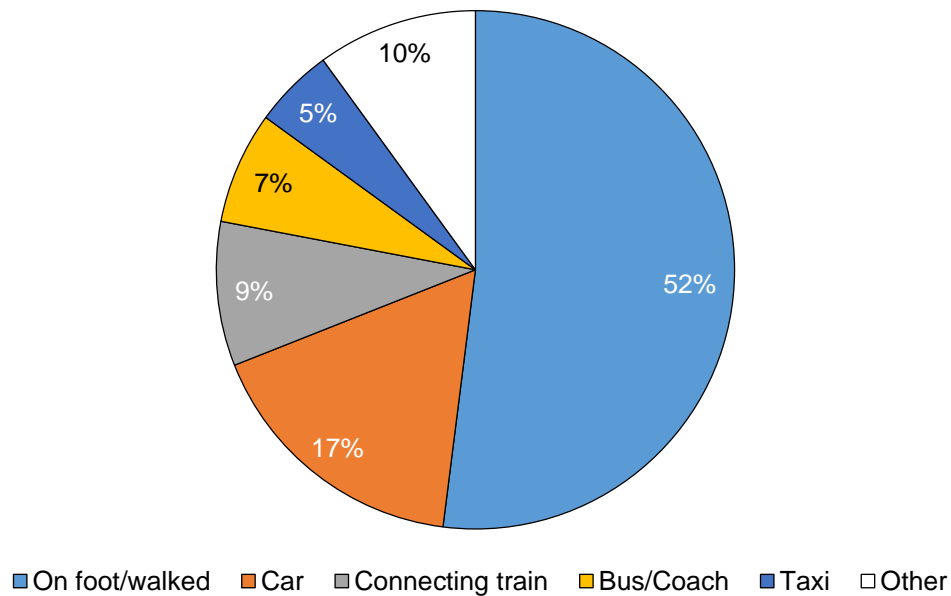


Despite this, the majority of passengers, both GB-wide and on the Wales and Borders network, walk to the origin station[21].

Figure 14 shows how people travelled to the station where they started their journey with Arriva Trains Wales during the Spring 2016 NRPS. It is similar to the regional sector average, although slightly fewer Arriva Trains Wales passengers arrive on foot and slightly more arrive by car (regional sector average is 57 per cent and 11 per cent respectively).

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[21] *National Rail Passenger Survey open data*, Spring 2016

**Figure 15. Methods of transport used to get to the station where started journey, Spring 2016 NRPS, by Arriva Trains Wales building block**

| Building block | On foot/walked | Car | Connecting train | Bus/Coach | Taxi | Other |
|---|---|---|---|---|---|---|
| South Wales and Borders/West Wales | 44 | 20 | 8 | 9 | 8 | 11 |
| North Wales and Borders | 48 | 22 | 6 | 10 | 2 | 12 |
| Mid Wales and Borders | 32 | 27 | 16 | 4 | 13 | 8 |
| Inter Urban | 36 | 23 | 15 | 10 | 12 | 4 |
| Cardiff and Valleys | 65 | 10 | 6 | 6 | 2 | 11 |
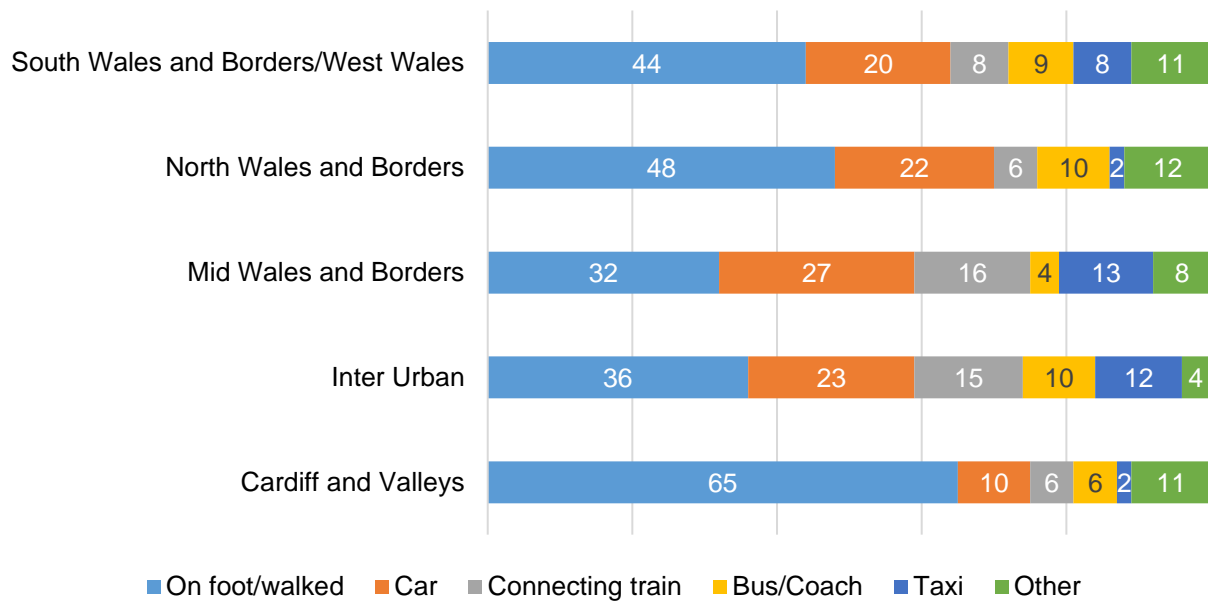
Figure 15 again shows how people travelled to their starting station, but broken down by route (NRPS building block). It demonstrates that there is considerable variation – the vast majority of Cardiff and Valleys passengers (65 per cent) walk to the station, whereas for Mid Wales and Borders almost as many people drive to the station as walk (27 per cent drive, 32 per cent walk).

Overall, 18 per cent of respondents said that an alternative mode was available and 41 per cent of people said that they would have liked to travel to the station by bus, had that option been available. When asked about what additional facilities would have enabled a change of mode, passengers primarily cited timetable constraints. They wanted to see more frequent buses that connect better with trains and run earlier/later in the day. After that passengers cite the location of the bus stop as a concern, as well as the quality of the lighting on the approach to the station. And passengers would like to see discounted fares to encourage them to use a different mode.

In our recent focus group research among Arriva Trains Wales passengers, we asked people why they choose to use the train. One reason that is cited is that the cost of taking the train compares favourably with the cost of driving and paying for parking and the current option of free parking at some stations aids this. They also feel that the train is less hassle than dealing with congestion and trying to find somewhere to park. However, some passengers who use Arriva Trains Wales stations in England where there is already a parking charge think that the cost of parking at their station is rather expensive. This may suggest that, if parking charges were introduced more widely across the network, some passengers would reconsider whether it still makes financial sense for them to use the train.

According to the NRPS (Figure 16), satisfaction with the facilities for car parking at Arriva Trains Wales stations is, at 60 per cent, markedly higher than the regional sector average of 54 per cent. It's slightly lower for Cardiff and Valleys stations, at 56 per cent, but this is still well above the 'short commute' typology average of 46 per cent.

**Figure 16: Autumn 2016 NRPS satisfaction with factors relating to getting to the station**

| | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| Facilities for car parking at the station | 60 | 56 | 70 | 60 | 74 | * |
| Connections with other train services | 75 | 70 | 72 | 72 | 79 | * |
| Connections with other forms of public transport | 62 | 56 | 69 | 77 | 67 | * |
| Facilities for bicycle parking at the station | 58 | 48 | 66 | * | * | * |

Overall Arriva Trains Wales passenger satisfaction in the Autumn 2016 NRPS with connections with other train services is 75 per cent, against a regional sector average of 78 per cent. Connections with other forms of public transport is at 62 per cent, significantly below the sector average of 72 per cent. This varies considerably across the network, with Cardiff and Valleys scoring just 56 per cent.

In 2014 we conducted research into transport integration in Scotland[22]. We found that expectations of integrated journeys were often low, and that passengers would try to avoid them if they could. Integrated journeys that involved more modes of transport and stages of travel were perceived to be more risky, stressful and more costly. The perceptions were not only fuelled by any personal experiences on public transport, but also by other people's experiences and news coverage about transport disruptions. Thus, it seemed common sense to avoid the 'gamble' of complex or multi-stage journeys by public transport and take the car. Convenience, speed and cost were key considerations for a satisfactory travel experience.

In general, when passengers decide what mode of transport to take they are swayed by three overwhelming factors: how convenient will the journey be, how much will it cost and how long will it take[23]. This applies to the whole door-to-door journey. Improving access to stations should therefore drive rail usage and provide some additional revenue.

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[22] *Transport Integration in Scotland*, June 2014
[23] *Integrated transport – perception and reality*, January 2010

The way passengers access the station can affect both overall journey cost and time. If getting to the rail station becomes too inconvenient passengers will often choose to make their whole journey by car, adding congestion to the roads and to transport's carbon footprint. Similarly, car parking charges can add sometimes substantial sums to the price of a journey and can create disincentives to choosing rail. There should be restrictions that limit the level of increase in those costs that fall within the operator's own control.

At some locations the solution to station access needs will be to improve public transport links and parking provision; but at others the solution will be more complex and could be more creative.

With limited space for car parking at some stations, and the industry's desire to look at more sustainable options, Transport Focus supports the use of Station Travel Plans. Local groups and CRPs should be involved in developing proposals to improve station access.

The specification for the rail service should encourage commitment to station travel plan schemes, with rollout dispersed across the network and throughout the life of the contract. The stations selected should not just be those with the highest footfall; we know that congestion does not just occur at those stations with the highest number of passengers starting or ending their journeys.

Bidders might also be asked to explore the potential to develop 'virtual branch lines' using existing scheduled bus services, with bus times and through fares available through railway journey planning and retail systems to and from towns with no railway station or limitations in service provision.

They may also need to address the absence, or potential loss, of access via public transport in places, particularly rural areas, where there is little or no funding for bus services. They should be encouraged to explore how they can contribute to potential initiatives for demand-led schemes.

The bidders should be able to demonstrate how they will work in partnership with local authorities and other agencies to improve accessibility to stations by all modes, including cycling and walking. Where identifiably beneficial schemes for passengers can be delivered by other partners, they should be encouraged and their future assured. Bidders should accommodate commitments to the future operation of any facilities provided.

### 4.6.1 Onward connections

Connecting onto other trains is another stress-point for passengers. In this country passengers very much favour direct services. This is again an issue of perceived convenience – one of the main barriers to using public transport[24]. Direct trains avoid the scenario of having to know which platform you need, manoeuvring heavy

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[24] *Integrated transport – perception and reality*, January 2010

suitcases or young children up and down staircases, only to discover that the train is late or that you have missed it altogether.

Where passenger journeys are reliant on connections, whether planned or in response to disruption, the operator must provide good-quality information for all circumstances relating to the journey. Well-timed connections with sufficient, but not excessive, time between arriving and departing trains and ease of transfer between the platforms are also important. Where possible this should be a level transfer, with minimal distance between arrival and departure points.

If there are delays to trains approaching common interchange stations then consideration should be given to the practicalities of holding connecting services and passengers should be informed about this in advance of arrival.

### 4.6.2 Supporting priorities for improving bus services

One of the barriers to encouraging more journeys is the ability to reach destinations by bus. This is reflected in our research into bus passengers' priorities for improvement[25]; where buses going to a wider range of destinations ranks sixth overall and fifth in rural areas. It is therefore vital to incentivise development of service networks, across a range of provision with properly planned connections and good standards of information, to give passengers the ability and confidence to make joined-up journeys, including across modes.

Bus passengers' top priority is better value for money, which is also key for rail passengers in Wales. This common interest should mandate working in partnership and consultation with bus operators, to deliver a well-supported door-to-door journey experience across modes, which will be a positive factor towards improving this priority and encouraging travel by public transport.

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[25] *Bus passengers have their say: Trust, what to improve and using buses more*, March 2016

## 4.7 Train services

Page 20. *How would you rate the following in order of priority?*

- *More frequent peak services*
- *More frequent off peak services*
- *Later last train*
- *Earlier first train*
- *More Sunday services*
- *Boxing Day services*
- *New Year's Day services*

Page 21. *How would you rate the following in order of priority?*

- *Faster journey times*
- *More reliable services*
- *More direct services (fewer changes)*
- *Co-ordination with other train and bus services*
- *Express services (limiting stops)*

Individual passengers' circumstances are likely to affect their views and priorities for the future of their rail service. To really understand people's needs locally, we would encourage Transport for Wales and any future operator to thoroughly consult the people who either use, or might use, these services, indicating what needs are intended to be addressed and providing detail about specific proposals.

In our research among current Arriva Trains Wales passengers, one issue that emerged was a desire for faster journey times on the longer-distance routes, such as North – South Wales and Arriva Trains Wales routes into England.

On many routes, passengers are fairly satisfied with service frequencies, but do welcome recent improvements in some areas. But there are exceptions – passengers in North Wales would like to see improvements to service frequency, and across the whole network passengers would welcome services that run later into the evening. In general, additional services to enhance frequency is seen to be a solution to issues with overcrowding, especially at peak times.

Punctuality, scheduled journey time and the frequency of the service are all key drivers of satisfaction, meaning that if passengers are satisfied with these factors, they are more likely to be satisfied with their journey overall.

Frequency is the third highest priority for improvement for Arriva Trains Wales passengers, at nearly two and a half times the importance of the 'average' factor. Factors relating to punctuality, getting a seat and information during disruption are also important priorities for improvement.

If we look at the priorities for improvement for passengers in Wales overall, as opposed to Arriva Trains Wales passengers, we can break the figures down by journey purpose. This reveals that there is considerable variation between different types of passenger. Figure 3 shows the top 15 priorities for improvement for passengers in Wales broken down by commuter, business and leisure journey

purpose. It shows that frequency is the second highest priority for improvement among commuters, slightly ahead of getting a seat. This suggests that capacity overall is an issue for commuters – and the fact that getting a seat is a much lower priority for improvement for commuters than business or leisure passengers suggests that, actually, passengers just want to be able to get on the train in the first place.

**Figure 17. Autumn 2016 NRPS satisfaction with factors relating to service parameters**

| | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| The frequency of trains on that route | 69 | 79 | 77 | 67 | 50 | 60 |
| The length of time the journey was scheduled to take | 82 | 83 | 74 | 76 | 91 | 81 |
| Sufficient room for all passengers to sit/stand | 70 | 65 | 62 | 71 | 88 | 68 |

The NRPS reveals (Figure 17) that satisfaction with frequency on Arriva Trains Wales routes overall is at 69 per cent, 10 points lower than the regional sector average. This is driven by particularly low satisfaction with frequency on North Wales and Borders and West Wales and Borders routes. Passengers using the Inter Urban and particularly the Cardiff and Valleys routes are significantly more satisfied with service frequency.

There is a big drop in satisfaction with frequency on Sundays, with only 57 per cent of passengers satisfied compared with 70 per cent on weekdays and Saturdays. People's lives have changed: they expect to go about their business, either work or leisure, seven days a week. They would like to see a timetable that reflects this.

Satisfaction with punctuality and reliability overall is slightly below the regional sector average, at 80 per cent to 82 per cent. But there is considerable variation across the network, with North Wales and Borders scoring 88 per cent and Cardiff and Valleys just 75 per cent. Given that delivering a punctual and reliable service is one of the most important drivers of satisfaction, it is important to get this right.

The scheduled journey time is also a driver of satisfaction, with 82 per cent of passengers satisfied. But only 74 per cent of passengers on the Inter Urban route are satisfied with journey length, suggesting this may warrant some attention.

Connections with other train services attracts a satisfaction level of 75 per cent, slightly below the regional sector average of 78 per cent. Satisfaction with connections with other forms of public transport is particularly low; at 62 per cent it is 10 points below the sector average.

### 4.7.1 Train service specification

The new operator should ensure that train service provision is based on passenger needs and priorities and is linked to measures of passenger satisfaction.

The key issue is whether passengers at each station have the required level of service to and from the places they want or need to travel, at the times they wish to do so. The starting point should be to optimise rail services based on passenger demand and any new opportunities that become available. The provision of sufficient capacity must be addressed, particularly for times of peak demand.

Our view is that origin and destination data should be used as the basis for understanding existing travel requirements. This data is available to the industry, but not generally to stakeholders. Without access to this key data and other relevant information, particularly about network capacity, timetabling options and comprehensive assessments of stakeholder views, it is not possible for others to derive a properly balanced judgement about service options.

It is therefore important that, when considering choices and bringing forward proposals, the decision makers, whether Government, Network Rail or the operator, should ensure that the rationale that underpins them is properly set out to all who have an interest.

Transport Focus supports a specification which is flexible enough to allow the operator to review usage and how station calls are allocated to train paths in order to improve overall capacity and efficient use of resources.

However, while acknowledging the need for some flexibility to adapt the train service to respond to current and changing demands, Transport Focus is clear that there must be sufficient detail in the specification to protect key journey opportunities. These must include journeys to/from school and work and, at key locations, to retain or improve connection opportunities.

This should also include consideration of the appropriate capacity and frequencies required for earlier and later in the day as well as weekends and bank holidays. In respect of the latter, invitations to tender should give strong encouragement for bidders to explore the potential for services to run on 26 December.

The service specifications and service options developed by bidders for the rail service must demonstrate full consideration of the capacity implications of all proposals.

Whatever the plans for the train service it is essential that the timetable proposals are subject to proper consultation, including the initial proposals for the specification.

Engagement with passengers and local communities should be regarded as a starting point for service developments. There must be a requirement for timely, transparent and meaningful consultation that allows all stakeholder views to be listened to prior to changes being finalised. Feedback, irrespective of whether it has been possible to accommodate the recommendation or request, must be provided.

From the outset, and throughout the life of the contract for operating the rail service, there are some principles that should be embedded, to be followed whenever timetables are revised:

- early consultation with passengers, followed by honest feedback about why the ultimate decisions were made

- existing basic features such as first and last trains, if satisfactory, should remain

- aspirations for improvements should be met if possible

- capacity and resources should be matched as closely as possible.

The service specification should take a holistic view of the needs of all passengers; commuter, business and leisure, from all parts of the network. Timetable opportunities must be optimised with passenger interests placed at the heart of planning and ahead of operational convenience.

Within the acknowledged capacity constraints of the rail service, the distribution of train services should be appropriate to passenger demand. Where possible there should be clearly differentiated services for different markets.

## 4.8 Service development

Page 21. *Please supply your ideas for new services or to address issues with the current timetable that cause difficulties*

In our focus group research with Arriva Trains Wales passengers comment on 'gaps' in the network, especially between North Wales, Mid-Wales and South. Specific examples include Aberystwyth to Carmarthen and Bangor to Porthmadog/Pwllheli. It is also felt to be a sub-standard service proposition for longer distance travel, for example to the Midlands and North. Passengers find such journeys to be long and laborious.

In different parts of the network, the research groups revealed the following feedback:

- In South Wales people find there to be little coordination between rail and other modes of transport; there is little sense of an urban or regional 'plan'
- In Mid Wales, the recent service enhancements to Aberystwyth are welcome. Passenger numbers have increased markedly since the changes, so they are clearly of value. To really make the most of this and tackle current concerns about capacity, with a service people can understand and rely on, we would recommend increasing this further to a regular, hourly service throughout the day.
That aside, people do find the current journey to Cardiff, requiring a change at Shrewsbury, to be rather convoluted.

- Passengers in North Wales highlight the need to adapt frequencies and the length of trains during peak tourist season to anticipate the demand and reduce crowding. They also call for more evening and weekend services.

The NRPS shows (Figure 18) that passengers are less satisfied with the frequency of services on Sundays compared to weekdays and Saturdays, by 57 per cent to 70 per cent. They're also less satisfied with the length of time the journey was scheduled to take and the connections with other train services.

**Figure 18. Autumn 2016 NRPS –Arriva Trains Wales service comparison between weekdays, Saturdays and Sundays**

| Arriva Trains Wales | Weekdays | Saturdays | Sundays |
|---|---|---|---|
| The frequency of trains on that route | 70 | 70 | 57 |
| The length of time the journey was scheduled to take | 83 | 80 | 71 |
| Connections with other train services | 75 | 79 | 67 |

We live in a seven-day economy. People use the train for all sorts of purposes – shopping, leisure, visiting friends and family to name but a few examples. Many people need to get to work on Saturdays and Sundays, as well as during the week. We advocate providing a train service that reflects the diversity of needs that local people have. This means providing a seven-day rail service, and on many routes one that runs later into the evening to allow people to use the train to return home after social events, such as going to a concert.

### 4.8.1 Connecting services

Many people across the Wales and Borders network have to catch more than one train as part of their journey, changing trains at places like Cardiff, Shrewsbury or Chester. These passengers rely on having convenient, straight-forward connections that they can trust and that avoid waiting around for extended periods. Satisfaction with connections with other train services is lower on Sundays than on weekdays and Saturdays, perhaps due to the reduced overall frequency. It is important to consider how to improve connections when looking at ideas for new or improved service patterns. It is important, also, to consider how to improve connections onto other operators' services, as well as within the Wales and Borders network.

'Connections with other train services are always good' ranks 11th out of 31 priority factors for improvement for Arriva Trains Wales passengers, which is higher than 15th in the Great Britain sample overall.

**Figure 19. NRPS satisfaction with transport connections**

| Attribute<br>% saying satisfied/good | Spr<br>12 | Aut<br>12 | Spr<br>13 | Aut<br>13 | Spr<br>14 | Aut<br>14 | Spr<br>15 | Aut<br>15 | Spr<br>16 | Aut<br>16 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Within Wales Journeys** | | | | | | | | | | |
| Connections with other forms of public transport | 64 | 67 | 61 | 63 | 58 | 61 | 68 | 59 | 57 | 59 |
| Connections with other train services | 79 | 81 | 85 | 87 | 73 | 78 | 77 | 74 | 84 | 74 |
| **Wales-England Journeys** | | | | | | | | | | |
| Connections with other forms of public transport | 73 | 72 | 76 | 78 | 72 | 70 | 78 | 66 | 68 | 74 |
| Connections with other train services | 78 | 81 | 78 | 73 | 74 | 73 | 75 | 73 | 70 | 75 |

Comparison of satisfaction with transport connections both within Wales and for Wales-England shows that whilst connections on Wales-England journeys are broadly similar for train and other forms of transport, when looking at journeys within Wales, the difference between connections with trains and with other forms of transport is significant. As shown in Figure 19, connections for Wales-England journeys did show marked deterioration since the Spring 2015 wave, but have now regained similar levels of satisfaction. Although at 75 per cent for train connections and 74 per cent for other transport, these need to improve further. However for journeys within Wales, satisfaction with train connections is at 74 per cent, whilst other transport is only at 59 per cent. This difference again highlights a need to ensure consultation with bus service providers, to ensure network connectivity, with integrated ticketing across Wales, to support passengers getting to the station and for their onward journeys.

### 4.8.2 Cross-border journeys

The latest figures from the Office of Rail and Road (ORR) highlight the importance of cross-border journeys to Welsh rail users[26]. In 2015-16 over 30 million annual rail journeys started and/or finished in Wales – an increase of 3.4 per cent on the previous year. Just under one-third of these crossed the Wales-England border – just over nine and a half million journeys. Figure 20, below, shows that the majority cross the border to or from the South West and London, with a significant proportion then going to or from the North West and West Midlands. Significant attention should therefore be given in the service specification to supporting key flows including:

- Bristol, Taunton, Birmingham, Manchester and Liverpool
- Heathrow, Birmingham, Manchester, Liverpool and Bristol Airports.

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[26] *Table 15.10: Regional rail journeys – Wales*, Office of Rail and Road, January 2017

This should include direct services and good connections, with understanding of key draws for business, service patterns for shifts and access to ticketing that might operate 'over the border'.

**Figure 20. Wales passenger journeys to/from other regions**



- South West
- London
- North West
- West Midlands
- South East
- East of England
- Yorkshire and Humber
- East Midlands
- Scotland
- North East
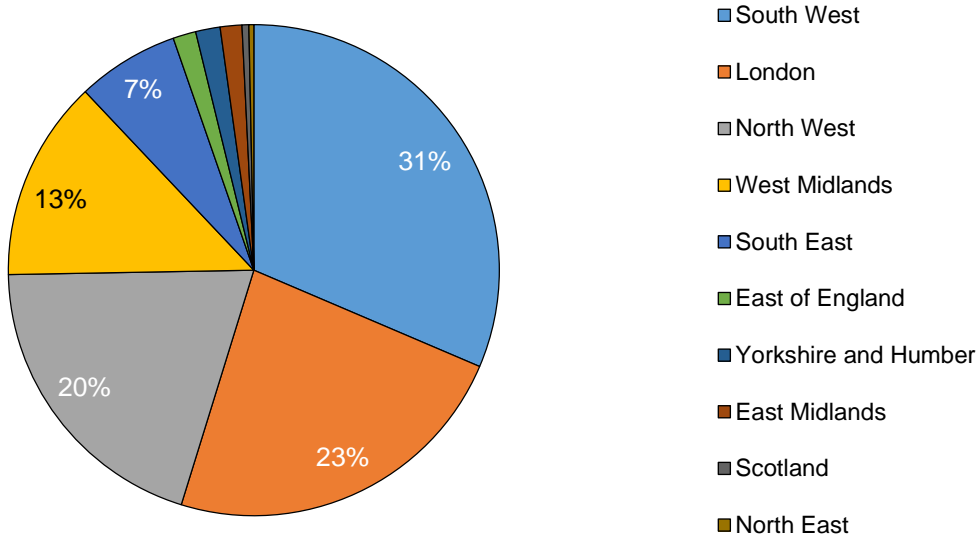
### 4.8.3 Freight trains

Page 29. *Currently, some of the core valley lines railway is dedicated to freight trains which are predicted to make declining use of it. Do you consider that the use of the network not needed for freight in the foreseeable future should be dedicated to passenger trains instead, with the consequence being that it would not then be available for use by freight trains in the event of new demand for freight traffic materialising in the future?*

Where there is a clear requirement for more frequent passenger services and for more capacity on trains, dedicating routes to passenger services at the expense of freight paths that are not currently used could provide a solution where one might otherwise be unavailable. Reaching such a decision should be subject to first gaining a clear understanding about any future needs for freight transport.

## 4.9 Promoting train usage

Page 24/30. *Please rank the following from 1 to 4 in terms of likelihood to encourage train use:*

- *special offers to encourage increased usage of off peak services*
- *discounts to the cost of travel for people with irregular work patterns or part-time hours*
- *more integrated tickets with other public transport modes such as buses*
- *simpler fare structure*
- *integration with other public transport e.g. buses*
- *park and ride facilities at stations*
- *special ticket fares (e.g. peak, off-peak, frequent travellers, arrangements for part-time and shift workers*
- *one point of contact for tickets, timetables , information on all public transport*

*Are there any other ticket offers we should ask the provider to consider?*

We know from our research that value for money is the top priority for improvement in Britain as a whole, and the second highest priority for improvement in Wales. The NRPS reveals that 61 per cent of Arriva Trains Wales passengers are satisfied with value for money, which is on par with the regional sector average of 60 per cent.

This message came out in our qualitative research with Arriva Trains Wales passengers. People recognised that fares were often cheaper than on other operators, and generally thought that the cost itself was reasonable. But they didn't feel that it represented value for money, given their lack of satisfaction with various aspects of the service, such as punctuality, capacity and the quality of the train.

Passengers want to feel valued. Our Arriva Trains Wales research showed that passengers view the current operator as rather 'distant' and 'corporate', not really representing the people it serves. People increasingly expect to be treated as individuals, and regular users want to be valued as loyal customers. Our earlier NRPS analysis of how people travel to the station on page 20 showed that passengers would appreciate discounted tickets being available for integrated journeys.

Effective promotion of offers and discounted travel is therefore a key component in communicating with passengers, supporting their understanding of what is available and improving satisfaction with value for money. The existing range of tickets and offers provides a useful starting point for bidders to build from:

- Mobile Multiflex – reduced cost pack of 12 mobile tickets, that enable passengers to select six train journeys each way between two applicable stations
- PlusBus – add-on ticket to allow onward travel by bus
- corporate season tickets – offering an interest free loan for business employees to buy an Annual Season Ticket, which is repaid through monthly salary deductions

- business service – selected North-South services offering faster journey times, with supplement for business class facilities and complimentary meals
- concessionary travel – continuing support for the Welsh Government's free travel scheme on lines where bus services are limited
- SailRail – providing integrated ticketing for train+ferry journeys to Ireland
- Explore Wales pass – allowing four days' train and eight days' bus travel within a period of eight consecutive days
- rover and ranger tickets – offering unlimited train travel for one day on specific areas of the Arriva Trains Wales network.

## 4.10 Ticketing

### 4.10.1 Value for money for passengers

Passengers are paying an increasingly high proportion of the costs of the railway and this makes the delivery of value for money a significant challenge. It is the top priority for improvement nationally.

Our fares and ticketing study investigated what influences passenger perceptions of value for money[27]. We found that, while intrinsically linked to the price of the ticket, value for money is also influenced by several other significant factors. These link directly to the findings of priorities research and NRPS drivers of passenger satisfaction:
- punctuality and reliability
- being able to get a seat
- passenger information during service disruption.

### 4.10.2 Making buying a ticket easier

Bidders must set out how they will make ticket purchase easier for passengers, who can be confused by the complexity of the fares system.

Clear information about the validity of tickets and any applicable restrictions must be readily available. Passengers should be offered the most appropriate ticket for their intended journey, regardless of whether this is at a ticket office, online, at a ticket machine or through any other method.

The new operator should provide a wider range of tickets for passengers. They should take advantage of developments in ticketing such as smartcards or contactless bank cards and mobile phone products.

They should also require the introduction of innovative new products such as carnet-style tickets that will enable passengers who cannot benefit from season ticket discounts (for example part-time workers) to achieve some economies from repeat travel. Schemes to spread the cost of annual season tickets should also be available.

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[27] *Fares and ticketing study*, February 2009

Bidders should also look at simplifying the fare structure. We believe a single-leg fare structure is easy to understand, removes the confusion of a return being £1 more than a single and allows passengers to mix and match different tickets, for example an Advance ticket for the outward leg and a semi-flexible ticket for the return.

The new operator should bring in systems that allow for sales of Advance tickets closer to the time of travel, as has been successfully introduced on the Cross Country (subject to adequate protections for people occupying 'empty' seats that can be booked). Information about the availability of Advance tickets and the number remaining for specific journeys should also be readily available. This helps give passengers confidence that such tickets exist.

Passengers should be given a range of options for ticket purchase so they can choose the method which is simplest and most convenient for them. This includes using the ticket office, ticket vending machines (TVMs), website, mobile and smartcard or contactless bank cards.

Many passengers prefer to buy from a ticket office because it offers the full range of tickets and staff can provide advice and reassurance on the best ticket to buy. Any proposals by bidders to significantly change ticket office opening hours must involve proper consultation and demonstrate that passengers will not suffer, for example no reduction in the range of tickets sold or the time it takes to buy them.

Even if it is not possible to buy a ticket at the station, there is value in having a mechanism in place that can provide passengers with evidence of an attempt to pay and reassurance against allegations of ticketless travel. If there is to be greater reliance on TVMs, or other methods, then some fundamental safeguards must be put in place. These include:

- ease of use and clear details of about the validity of, and any restrictions applicable to, tickets offered

- offer of a comprehensive range of tickets and/or ability to tell passengers what to do should the ticket they want not be available

- capability of remote monitoring so that any faults are identified and can be rectified.

In addition revenue protection strategies must set out:

- procedures for alerting revenue protection staff if there is a fault with the machine

- systems for monitoring queue length – passengers should not be penalised for queue lengths in excess of the three/five minutes targets set out in the Ticketing and Settlement Agreement (TSA).

Transport Focus's research has identified a number of issues with both TVMs and websites – much of which was reflected in Government's own Fares and Ticketing Review consultation in 2012, and subsequently in the industry's own retail

information code of practice[28]. We are taking an active role in a task force, set up by the Government, to tackle these issues. The task force published its *Action plan for information on rail fares and ticketing*[29] in December 2016, and is reviewing progress on a monthly basis. A final report will be published in December 2017.

Key issues to focus on include:
- printing any restrictions on passengers' tickets to remove confusion over validity

- displaying outward and return ticket restrictions on TVMs prior to a passenger committing to purchase

- making it impossible to buy an Advance ticket on the internet at a higher price than the 'walk-up' fare available on the same train

- making TVMs capable of accepting cash as well as card payments.

More details of the problems passengers experience, and recommendations about how to improve retailing through these channels, can be found in our research into ticket vending machine usability and ticket retailing website usability[30].

The key is to ensure that passengers have all the necessary information on which to make an 'informed purchase'.

### 4.10.3 Smart ticketing
We know, from our research programme on smarter travel[31], that passengers across modes and throughout the country do see real benefits in smart ticketing.

When thinking about the introduction of smart ticketing, and preferences for how this will work, there are seven key attributes that drive attitudes and views.

- **Value for money**
  Value for money is a key driver for ticket choice at the moment, and remains an important factor when considering smart ticketing. Passengers expect that smart ticketing will involve some kind of cost saving either via cheaper fares or new cost-effective tickets and products.

- **Convenient**
  Smart ticketing needs to be a convenient option that is easy to use. The research participants told us they look for a ticketing system that makes life easier, rather than complicating their commute. When thinking about convenience, they want a system where it is easy to buy tickets, to manage their smart ticket account and use their ticket.

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[28] *A Code of Practice on retail information for rail tickets and services,* March 2015, http://www.nationalrail.co.uk/times_fares/ticket_types/93747.aspx
[29] *Action plan for information on rail fares and ticketing*, December 2016
[30] *Ticket vending machine usability*, July 2010 and *Ticket retailing website usability*, July 2011
[31] http://www.transportfocus.org.uk/research-publications/research/smarter-travel/

- **Simple**
  Simplicity is important, especially for those unfamiliar with smart technology or smart ticketing. These people are most likely to need education regarding how smart ticketing will work, and a simple system is likely to support them in moving to smart ticketing.

- **Secure**
  Our research participants had some concerns about the security of smart ticketing. When thinking about smart cards, people expect that their personal data will be kept safe – especially any details that will be printed and visible on the card.

  When thinking about mobile ticketing and contactless, many were concerned about the safety and security of their mobile phone or credit card, and the potential for theft when using these. However, a benefit of smart ticketing is that the ticket details are thought to be safer – for instance if a card is lost or stolen then it will be easier to get the product cancelled and reissued.

- **Flexible**
  Alongside a convenient and easy-to-use system, people want smart ticketing to be flexible. They want the ability to choose and purchase new products and tickets that offer flexible travel options. They also want flexibility with regards to managing their smart ticketing account, including being able to make ticket purchases at the last minute and being able to upload tickets at a range of stations.

- **Tailored management**
  In addition to new products that would enable people to tailor their smart ticket products to their needs, people also want tailored smart ticketing accounts. Many want to manage them online and via an app. They want the ability to choose how they prefer to manage their account (online, app, text message), and reassurances that this will be tailored to be compatible with the technology they own, for example, Apple or Android-compliant.

- **Leading edge**
  People feel that the introduction of smart ticketing is a shift into a more technology-focused way of ticketing. With this in mind they are keen that the technology used is forward-thinking. This is particularly noted by those who are familiar with smart technology and smart ticketing, and who see this as an opportunity for train operating companies to lead the way in ticketing technology rather than replicate existing systems.

Some key principles have emerged from our smart ticketing work:
- designing good systems, where passengers are consulted from the outset and their views are fully incorporated

- making sure that communications to both customers and staff are clear, easily-accessible, consistent and comprehensive
- ensuring that staff are fully trained when systems are introduced, so that they can sympathetically deal with any issues, problems or queries that their passengers may have.

### 4.10.4 Ticketless travel

Research has shown that passengers find the issue of fare evasion very frustrating[32]. There is a strong sense of injustice amongst those who have paid for a ticket when some passengers are known to be travelling without a ticket. They also felt that this reduced the amount of money available for investment.

Passengers believe that the main solution to fare evasion would be to make better provision for the purchase of tickets at stations and on board, and to implement better checking procedures and enforcement. This must include:

- clarity and consistency over when it is permissible to buy a ticket on board a train – the current system is felt to be too arbitrary

- managing ticket queues effectively (at TVMs and offices)

- providing ticket restrictions in an easy-to-access form and in plain language

- providing the passenger with verification of permission to travel without a ticket

- providing the passenger with verification of attempt to purchase a ticket if a card is declined due to bank security measures or signal issues.

Further roll-out of ticket barriers and ensuring that ticket barriers, where provided, are in use consistently can be helpful in ensuring that all travellers pay for the journey they are making. It is important that there are sufficient numbers of staff available to ensure that barriers in place are used effectively and not left open. Gate-line staff also provide the visible staff presence that passengers value.

There need to be sufficient barriers to cope with the number of passengers passing through them, particularly at peak times. Where problems arise staff should be empowered to take appropriate action to ease congestion at the gates.

Where remote staffing for barriers is a consideration, there will need to be proper consultation to look at demand, the suitability of this approach for each location and any implications for disabled passengers.

Transport Focus believes ticketless travel is an important issue and one that needs to be addressed. Passengers who avoid paying for their ticket are in effect being subsidised by the vast majority of fare-paying passengers.

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[32] *Passenger views on Northern and TransPennine rail franchises,* December 2012

However, the revenue protection strategy must provide safeguards for those who make an innocent mistake and whose intention was never to defraud the system. We believe this requires:

- clear consistent guidelines explaining when staff should show discretion in the enforcement of penalties (for example, when passengers do not have their railcard with them)

- commitment not to go straight to any form of criminal prosecution unless operators suspect (or have proof) that there was intent to defraud

- penalties that are proportionate to the actual loss suffered by the operator

- operators to work with others in the industry to create a national system that is transparent and supports the honest passenger who makes a mistake

- giving passengers charged a penalty or a fine a genuine opportunity to appeal against that decision, via an independent, binding appeals mechanism, before any action is taken (including the addition of administration fees).

We recommend that operators develop and publicly consult on a revenue protection strategy. In doing so they should be mindful of the recommendations within our *Ticket to Ride* publications[33].

The UK Government has announced plans to ensure that passengers who have received a penalty fare are treated fairly, with an independent appeals process in place. The plans include:

- simpler rules on deadlines for payments and appeals
- creation of a third-stage independent appeals panel
- existing appeals bodies must be independent of train operators
- better government oversight of appeals process through an annual audit of penalty fares data.

### 4.10.5 Fares regulation

Passengers have experienced years of above-inflation fare increases. We were pleased when Government in Westminster agreed to peg increases to regulated fares in England to the rate of inflation (RPI). Transport Focus supports the concept of fares regulation as it provides some degree of protection to passengers, many of whom are captive consumers.

We recommend that the new operator incorporates these recommendations on ticket retailing within the requirements. Increases to unregulated fares should be capped at the same level applied to regulated fares. The journey opportunities of off-peak passengers should be protected and there should be no further dilution of periods of validity of off-peak tickets.

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[33] *Ticket to ride?*, May 2012 and *Ticket to ride – an update*, February 2015

## 4.11 Information for passengers

Page 24/31. *How would you prefer to receive passenger information? For each of the bullets below, select from the following options: information at station, app, email and text, website, on train, social media, staff at stations.*

- *Planned disruption and service alterations*
- *Live travel information including delays*
- *Journey planning including train times*
- *New services*
- *Fare changes*
- *Travel information for major events*
- *Train and service performance information.*

Page 32. *Thinking about planned disruption for major infrastructure projects such as Metro, which of the following would you prefer:*

- *Blocked closure period of consecutive months (shortest construction period)*
- *Several closure periods of weeks at a time over the course of the construction phase (construction period longer than option 1)*
- *Maintain services as much as possible and limit work to nights and weekends, which may affect early and late services (construction would take longest to complete).*

Passengers expect to be kept informed. Their needs are diverse, and the way they prefer to receive information is specific to the individual, so we would expect the operator to provide accurate, consistent and comprehensive information via a range of channels.

In our rail passenger priorities for improvement research, Arriva Trains Wales passengers identified 'keeping passengers informed about delays' and 'accurate and timely information available at stations' as the fourth and sixth highest priorities for improvement, both at around one and a half times the importance of the average factor.

The NRPS shows (Figure 21) that satisfaction with the provision of information during the journey is well below where it could be, at 63 per cent against a regional sector average of 71 per cent. Satisfaction with how well the train company dealt with delays, and usefulness of information during delays, is also low, at 42 per cent and 50 per cent respectively.

Passengers repeatedly tell us that they want visible, helpful and informed staff, both at stations and on trains. They are a valuable source of information and assistance, as well as helping people to feel safe and secure.

**Figure 21. Autumn 2016 NRPS satisfaction with factors relating to information**

| | Arriva Trains Wales | Cardiff and Valleys | Inter Urban | Mid Wales and Borders | North Wales and Borders | South Wales and Borders/ West Wales |
|---|---|---|---|---|---|---|
| **The provision of information during the journey** | 63 | 53 | 70 | 73 | 72 | 62 |
| **How well train company dealt with delays** | 42 | 37 | 59 | * | * | * |
| **Usefulness of information during delays** | 50 | 49 | 77 | * | * | * |
| **Provision of information about train times/platforms** | 78 | 78 | 85 | 81 | 82 | 71 |

*Sample size is below 50

Our research among current Arriva Trains Wales passengers highlights that people rely on visible, helpful and informed staff for information and assistance, and that they express concern when a personal point of contact isn't available. Passengers, especially commuters, use websites like National Rail to check for disruption. They don't view the Arriva Trains Wales social media feeds as a reliable source of information, and tend not to use the operator's own website for information, except in times of major disruption such as that caused by the recent Storm Doris. This suggests that there is scope for future improvement to digital channels and a case for increased promotion, possibly linked to loyalty schemes.

Passengers feel that the current operator doesn't respond sufficiently to special events or circumstances that cause crowding or disruption. Plans should be made and well-publicised to help people make their journeys as smoothly as possible. The operator should work with event providers and ticket outlets to ensure that travel information is fully communicated, and that. They should also ensure that regular passengers are aware of the impact of such plans.

Passengers want information that is specifically relevant to them. For many passengers, for example if they have booked online or they hold a season ticket, the operator should be able to provide travel information and service updates about their particular journey. Passengers would like to be able to access performance information, specific to their journey.

### 4.11.1 Managing service disruption
Our work on passenger priorities shows that keeping passengers informed when there is disruption is one of the top five priorities for improvement. The impact of not doing so can be seen in our work on passenger satisfaction where, typically, how well the operator dealt with delays is the highest driver of overall dissatisfaction with the journey.

The provision of high-quality and effective passenger information during disruption is vitally important. However, it is intrinsically linked to the broader

topic of managing or, better still, minimising the disruption that blights far too many passenger experiences.

### 4.11.2 Unplanned service disruption

In 2014 Transport Focus published research looking at passengers' needs and experiences during unplanned disruption, including around the provision of information[34].

We made a number of recommendations we would encourage bidders to make credible plans to address. However, there are two key points that the operator must address from day one:

- the cultural issue, across the industry, that deficiencies in passenger information at times of disruption persist in a way that would not be tolerated if they were operational or safety failures
- operators must measure the quality of information provided during disruption on a robust and ongoing basis.

In addition to the recommendations within that research, we encourage Government to secure two important factors in providing effective passenger information during disruption:

- visual and audible information at all stations
- train movement data sufficiently detailed to deliver accurate live departure predictions for all stations – this could mean fitting GPS devices to all trains. Allowing positional data to be fed to Darwin via the 'GPS gateway' currently under development would seem likely to be the best solution.

### 4.11.3 Resilience

Transport Focus recommends that the new operator places a strong emphasis on service resilience, including in the face of severe weather. Specifically, we feel bidders should be required to:

- set out the extent to which they will rely on overtime and rest-day working to deliver the service, including on Sundays and at Christmas
- show they have effective maintenance and repair facilities balanced with reasonable rolling stock availability assumptions that are not so optimistic that passengers are at continual risk of experiencing short-formed and cancelled trains.

Recent research into passengers' views and expectations of rail services during extreme weather found three core principles that the rail industry must embrace[35]:

- provide timely, accurate information so passengers can make informed decisions about their journeys

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[34] *Passenger information when trains are disrupted*, September 2014
[35] *Reacting to extreme weather on the railways*, July 2015

- be transparent – help passengers understand why timetable changes and service suspensions have been made
- demonstrate that train companies and Network Rail are doing their best on behalf of passengers, despite the weather.

### 4.11.4 Engineering works

Engineering works are inevitable in maintaining the infrastructure that supports rail operations and allowing future improvements. As such, the planning, scheduling and management of this disruption is part and parcel of regular business. There should be structured procedures for managing this activity that are regularly reviewed, then adapted and refined in the light of experience.

Regardless of scale, and as a core principle, it is vital that passengers receive appropriate and timely information about the effect that engineering works will have on their particular journey and are given appropriate advice about alternatives. It is important that revised timetables are robust and achievable.

More generally, bidders should be required to set out how they will work with Network Rail to minimise the use of 'all line' engineering blocks. Culturally, the default assumption must be that routes remain open while maintenance, renewal and enhancement takes place, with exceptions made where there is compelling need.

There should be a full consultation exercise with passengers who will be affected by major infrastructure changes to identify the best way to schedule the works. Any decision on scheduling should consider and account for the needs of everyone who uses the service as far as possible. Whatever conclusion is reached should be communicated clearly to passengers, a full explanation of what is happening, how and why, and specifically how it affects their journey.

Bidders should recognise that 55 per cent of passengers say they would not travel at all if a replacement bus is involved[36]. We encourage a joint, public commitment from future operators and Network Rail that, wherever practically possible, they will keep passengers on trains and transfer them to buses only as a last resort. Decisions should not be based solely on operational convenience.

Use of diversionary routes and/or using shuttles to move passengers as far along the route as possible is an important way to minimise the number of passengers needing to use replacement buses or the length of this element of the journey.

Transport Focus encourages bidders to have credible proposals for regularly submitting a high-quality bid to Network Rail 18 weeks out from work starting, so accurate amended timetables are in the public domain and reservations open 12 weeks before. We recommend that operators should be required to report, period by period, on the level of changes to the train plan after this 12-week point.

Recent Transport Focus research looks at passengers' experiences from two sets of planned works, at Reading and Bath Spa, in 2015[37]. While the nature and impact of the two engineering projects were very different, the research findings provide useful

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[36] *Rail passengers' experiences and priorities during engineering works*, September 2012
[37] *Planned rail engineering work – the passenger perspective*, December 2015

insight into passengers' core information needs and offer valuable lessons for the rail industry as a whole.

The research indicates the need for a flexible approach to communications planning in the build up to scheduled disruption. The fact that every project and the associated disruption is different means that the onus is on train companies and Network Rail planners to know what their passengers want and understand how a specific project will affect different passenger types.

The results of that assessment should then allow them to tailor communications to give the right level of detailed information when passengers want it, using the most effective communications channel.

The research makes five key recommendations for planning and delivering engineering schemes:

- consider how the various elements of the engineering work are likely to affect individual passengers' journeys: who does it affect and how?
- build this insight into your planning approach so that you are able to deliver a tailored information campaign: tell passengers what they want to know about their journey, when they need to know it
- tailor your message
- timing of information: every project is different so be prepared to be flexible
- use full range of information channels to reach different types of passengers.

# 5. Further information

For further information about this response to the Wales and Borders rail service consultation please contact:

Sharon Hedges
Franchising programme manager
sharon.hedges@transportfocus.org.uk

David Beer
Stakeholder Manager
david.beer@transportfocus.org.uk

Further details of all our publications exploring passenger perspectives on a range of issues can be found on the Transport Focus website www.transportfocus.org.uk. For specific information about franchising visit www.transportfocus.org.uk/franchising.

# 6. Appendices

## Appendix 1. NRPS building block definitions

### A1.1 Arriva Trains Wales NRPS building blocks

**Arriva Trains Wales: Cardiff and Valleys**
Journeys on the Valley lines around Cardiff

**Arriva Trains Wales: Inter Urban**
Journeys on the Fishguard Harbour – Manchester Piccadilly, Milford Haven – Manchester Piccadilly, and Holyhead – Cardiff Central lines

**Arriva Trains Wales: Mid Wales and Borders**
Journeys on the Pwllheli/Aberystwyth – Birmingham International, Shrewsbury – Crewe, and Holyhead – Birmingham International lines

**Arriva Trains Wales: North Wales and Borders**
Journeys on the Llandudno – Manchester Piccadilly, Bidston – Wrexham Central, Chester – Crewe, and Llandudno/Llandudno Junction – Blaenau Ffestiniog lines

**Arriva Trains Wales: South Wales and Borders/West Wales**
Journeys on the Swansea – Shrewsbury, Maesteg – Cheltenham Spa, Pembroke Docks – Swansea, Swansea – Cardiff Central, and Cardiff Central – Ebbw Vale Town lines


### A1.2 NRPS typology groups and comparator services

**Arriva Trains Wales – Cardiff and Valleys, South Wales and Borders/West Wales: Short commute**
Arriva Trains Wales - Cardiff and Valleys
Arriva Trains Wales - South Wales and Borders/West Wales
c2c - Southend Line
c2c - Tilbury Line
Chiltern Railways - Metro
East Midlands Trains - Local
London Midland - West Midlands
London Overground - Highbury & Islington - Croydon/Clapham
London Overground - Richmond/Clapham - Stratford
London Overground - Watford - Euston
London Overground - West Anglia
Merseyrail - Northern
Merseyrail - Wirral
Northern - Central
Northern - North East
Northern - West

ScotRail - Strathclyde
South West Trains - Metro
Southeastern - Metro
Southern - Metro
TfL Rail
Thameslink - Loop
Thameslink – Kent

**Arriva Trains Wales – Inter Urban: Interurban**
Arriva Trains Wales - Inter Urban
CrossCountry - East - West
Greater Anglia - Intercity
London Midland - West Coast
Northern - East
ScotRail - Interurban
South West Trains - Longer distance
TransPennine Express - North West
TransPennine Express – South

**Arriva Trains Wales – Mid and North Wales and Borders: Rural**
Arriva Trains Wales - Mid Wales and Borders
Arriva Trains Wales - North Wales and Borders
Greater Anglia - Rural
Great Western Railway - West
ScotRail - Rural
South West Trains - Island Line

## Appendix 2 NRPS satisfaction scores[38]

## A2.1 NRPS Autumn 2016: percentage satisfied, Arriva Trains Wales (ATW) compared to Regional sector

| Factor | ATW | Regional | TOC Index[39] |
|---|---|---|---|
| **Overall satisfaction with the journey** | 82 | 84 | 98 |
| Train factors | | | |
| Overall satisfaction with the train | 75 | 80 | 94 |
| The frequency of the trains on that route | 69 | 79 | 88 |
| Punctuality/reliability (i.e. the train arriving/departing on time) | 80 | 82 | 97 |
| The length of time the journey was scheduled to take (speed) | 82 | 87 | 94 |
| Connections with other train services | 75 | 78 | 96 |
| The value for money for the price of your ticket | 61 | 60 | 101 |
| Cleanliness of the train | 70 | 74 | 95 |
| Upkeep and repair of the train | 64 | 70 | 92 |
| The provision of information during the journey | 63 | 71 | 89 |
| The helpfulness and attitude of staff on train | 84 | 79 | 108 |
| The space for luggage | 63 | 61 | 102 |
| The toilet facilities | 47 | 43 | 109 |
| Sufficient room for all passengers to sit/stand | 70 | 72 | 97 |
| The comfort of the seating area | 72 | 72 | 99 |
| The ease of being able to get on and off | 78 | 83 | 93 |
| Your personal security whilst on board | 80 | 81 | 98 |
| The cleanliness of the inside | 70 | 75 | 94 |
| The cleanliness of the outside | 66 | 71 | 92 |
| The availability of staff on the train | 73 | 64 | 113 |
| How well train company dealt with delays | 42 | 42 | 99 |
| Usefulness of information during delays | 50 | 53 | 95 |
| Station factors | | | |
| Overall satisfaction with the station | 75 | 81 | 93 |
| Ticket buying facilities | 71 | 78 | 91 |
| Provision of information about train times/platforms | 78 | 84 | 93 |
| The upkeep/repair of the station buildings/platforms | 66 | 78 | 85 |
| Cleanliness of the station | 69 | 80 | 86 |
| The facilities and services at the station | 49 | 55 | 89 |
| The attitudes and helpfulness of station staff | 75 | 80 | 94 |
| Connections with other forms of public transport | 62 | 72 | 87 |
| Facilities for car parking at the station | 60 | 54 | 111 |
| The overall station environment | 67 | 76 | 88 |
| Your personal security whilst using the station | 69 | 76 | 90 |
| The availability of staff at the station | 58 | 70 | 83 |
| The provision of shelter facilities | 70 | 77 | 91 |
| Availability of seating | 56 | 61 | 92 |
| How request to station staff was handled | 84 | 87 | 96 |
| The choice of shops/eating/drinking facilities available | 38 | 45 | 85 |
| Facilities for bicycle parking at the station | 58 | 63 | 92 |
| TOC score is five per cent or more below sector average[40] | | | |
| TOC score is five per cent or more above sector average | | | |

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[38] In Appendix 2 * indicates building block scores where the sample size is below 50

[39] TOC Index shows performance of TOC against the sector as a percentage (e.g. if TOC score is equal to sector score the TOC Index would be 100%. If it is 102% the performance is better)

[40] In Appendix 2, red or green colouring is applied before rounding – for example, if a factor is 4.62 per cent below the average it would appear as 5 per cent below due to rounding, but would not be coloured red.

## A2.2 NRPS Autumn 2016: percentage satisfied, Cardiff and Valleys route, compared to Short Commute typology average and best in class

| Factor | Cardiff and Valleys | Short commute typology | Best in class (BIC) |
|---|---|---|---|
| **Overall satisfaction with the journey** | 78 | 81 | 95 |
| Train factors | | | |
| Overall satisfaction with the train | 68 | 79 | 92 |
| The frequency of the trains on that route | 79 | 73 | 97 |
| Punctuality/reliability (i.e. the train arriving/departing on time) | 75 | 72 | 93 |
| The length of time the journey was scheduled to take (speed) | 83 | 82 | 97 |
| Connections with other train services | 70 | 76 | 90 |
| The value for money for the price of your ticket | 52 | 48 | 75 |
| Cleanliness of the train | 62 | 75 | 91 |
| Upkeep and repair of the train | 54 | 74 | 95 |
| The provision of information during the journey | 53 | 69 | 88 |
| The helpfulness and attitude of staff on train | 76 | 56 | 92 |
| The space for luggage | 56 | 53 | 71 |
| The toilet facilities | 39 | 29 | 58 |
| Sufficient room for all passengers to sit/stand | 65 | 65 | 81 |
| The comfort of the seating area | 62 | 71 | 84 |
| The ease of being able to get on and off | 74 | 78 | 91 |
| Your personal security whilst on board | 72 | 74 | 86 |
| The cleanliness of the inside | 61 | 76 | 90 |
| The cleanliness of the outside | 62 | 74 | 89 |
| The availability of staff on the train | 63 | 35 | 83 |
| How well train company dealt with delays | 37 | 32 | 64 |
| Usefulness of information during delays | 49 | 44 | 79 |
| Station factors | | | |
| Overall satisfaction with the station | 72 | 81 | 92 |
| Ticket buying facilities | 70 | 76 | 88 |
| Provision of information about train times/platforms | 78 | 81 | 91 |
| The upkeep/repair of the station buildings/platforms | 66 | 74 | 90 |
| Cleanliness of the station | 66 | 78 | 89 |
| The facilities and services at the station | 36 | 53 | 66 |
| The attitudes and helpfulness of station staff | 73 | 77 | 92 |
| Connections with other forms of public transport | 56 | 77 | 86 |
| Facilities for car parking at the station | 56 | 46 | 77 |
| The overall station environment | 63 | 72 | 86 |
| Your personal security whilst using the station | 62 | 73 | 83 |
| The availability of staff at the station | 51 | 67 | 88 |
| The provision of shelter facilities | 65 | 71 | 89 |
| Availability of seating | 51 | 52 | 75 |
| How request to station staff was handled | * | 83 | 100 |
| The choice of shops/eating/drinking facilities available | 28 | 42 | 58 |
| Building block score is five points or more below typology average | | | |
| Building block score is five points or more above typology average | | | |

## A2.3 NRPS Autumn 2016: percentage satisfied, ATW Inter Urban, compared to Interurban typology average and best in class

| Factor | ATW Inter Urban | Interurban | BIC |
|---|---|---|---|
| **Overall satisfaction with the journey** | 84 | 85 | 88 |
| Train factors | | | |
| Overall satisfaction with the train | 76 | 82 | 86 |
| The frequency of the trains on that route | 77 | 81 | 89 |
| Punctuality/reliability (i.e. the train arriving/departing on time) | 79 | 82 | 85 |
| The length of time the journey was scheduled to take (speed) | 74 | 84 | 87 |
| Connections with other train services | 72 | 75 | 89 |
| The value for money for the price of your ticket | 53 | 53 | 73 |
| Cleanliness of the train | 71 | 77 | 86 |
| Upkeep and repair of the train | 64 | 73 | 88 |
| The provision of information during the journey | 70 | 75 | 84 |
| The helpfulness and attitude of staff on train | 83 | 79 | 86 |
| The space for luggage | 60 | 58 | 77 |
| The toilet facilities | 44 | 43 | 64 |
| Sufficient room for all passengers to sit/stand | 62 | 68 | 81 |
| The comfort of the seating area | 67 | 72 | 81 |
| The ease of being able to get on and off | 77 | 83 | 87 |
| Your personal security whilst on board | 81 | 83 | 87 |
| The cleanliness of the inside | 74 | 78 | 87 |
| The cleanliness of the outside | 66 | 77 | 88 |
| The availability of staff on the train | 74 | 63 | 74 |
| How well train company dealt with delays | 59 | 48 | 65 |
| Usefulness of information during delays | 77 | 50 | 77 |
| Station factors | | | |
| Overall satisfaction with the station | 84 | 84 | 89 |
| Ticket buying facilities | 85 | 81 | 92 |
| Provision of information about train times/platforms | 85 | 87 | 93 |
| The upkeep/repair of the station buildings/platforms | 72 | 76 | 83 |
| Cleanliness of the station | 74 | 80 | 87 |
| The facilities and services at the station | 63 | 63 | 77 |
| The attitudes and helpfulness of station staff | 79 | 80 | 86 |
| Connections with other forms of public transport | 69 | 77 | 83 |
| Facilities for car parking at the station | 70 | 54 | 70 |
| The overall station environment | 74 | 76 | 86 |
| Your personal security whilst using the station | 77 | 77 | 81 |
| The availability of staff at the station | 68 | 68 | 82 |
| The provision of shelter facilities | 75 | 75 | 86 |
| Availability of seating | 56 | 51 | 67 |
| How request to station staff was handled | 80 | 86 | 96 |
| The choice of shops/eating/drinking facilities available | 55 | 55 | 67 |

Building block score is five points or more below typology average
Building block score is five points or more above typology average

**A2.3 NRPS Autumn 2016: percentage satisfied, Mid Wales and Borders building block, compared to Rural typology average and best in class**

| Factor | Mid Wales and Borders | Rural | BIC |
|---|---|---|---|
| **Overall satisfaction with the journey** | 87 | 83 | 90 |
| Train factors | | | |
| Overall satisfaction with the train | 80 | 80 | 86 |
| The frequency of the trains on that route | 67 | 67 | 87 |
| Punctuality/reliability (i.e. the train arriving/departing on time) | 85 | 82 | 97 |
| The length of time the journey was scheduled to take (speed) | 76 | 83 | 98 |
| Connections with other train services | 72 | 72 | 91 |
| The value for money for the price of your ticket | 63 | 64 | 84 |
| Cleanliness of the train | 80 | 75 | 80 |
| Upkeep and repair of the train | 76 | 74 | 78 |
| The provision of information during the journey | 73 | 67 | 82 |
| The helpfulness and attitude of staff on train | 88 | 82 | 97 |
| The space for luggage | 63 | 62 | 84 |
| The toilet facilities | 57 | 50 | 74 |
| Sufficient room for all passengers to sit/stand | 71 | 72 | 93 |
| The comfort of the seating area | 80 | 74 | 82 |
| The ease of being able to get on and off | 84 | 77 | 93 |
| Your personal security whilst on board | 87 | 81 | 93 |
| The cleanliness of the inside | 81 | 75 | 81 |
| The cleanliness of the outside | 68 | 70 | 85 |
| The availability of staff on the train | 80 | 70 | 94 |
| How well train company dealt with delays | * | 52 | 100 |
| Usefulness of information during delays | * | 51 | 61 |
| Station factors | | | |
| Overall satisfaction with the station | 78 | 81 | 82 |
| Ticket buying facilities | 75 | 77 | 82 |
| Provision of information about train times/platforms | 81 | 84 | 87 |
| The upkeep/repair of the station buildings/platforms | 68 | 75 | 79 |
| Cleanliness of the station | 74 | 82 | 88 |
| The facilities and services at the station | 63 | 57 | 69 |
| The attitudes and helpfulness of station staff | 83 | 83 | 97 |
| Connections with other forms of public transport | 77 | 66 | 88 |
| Facilities for car parking at the station | 60 | 62 | 90 |
| The overall station environment | 70 | 75 | 79 |
| Your personal security whilst using the station | 76 | 76 | 80 |
| The availability of staff at the station | 67 | 67 | 73 |
| The provision of shelter facilities | 74 | 71 | 79 |
| Availability of seating | 62 | 59 | 76 |
| How request to station staff was handled | * | 89 | 94 |
| The choice of shops/eating/drinking facilities available | 53 | 42 | 53 |

Building block score is five points or more below typology average
Building block score is five points or more above typology average

**A2.3 NRPS Autumn 2016: percentage satisfied, North Wales and Borders, compared to Rural typology average and best in class**

| Factor | North Wales and Borders | Rural | BIC |
|---|---|---|---|
| **Overall satisfaction with the journey** | 89 | 83 | 90 |
| Train factors | | | |
| Overall satisfaction with the train | 83 | 80 | 86 |
| The frequency of the trains on that route | 50 | 67 | 87 |
| Punctuality/reliability (i.e. the train arriving/departing on time) | 88 | 82 | 97 |
| The length of time the journey was scheduled to take (speed) | 91 | 83 | 98 |
| Connections with other train services | 79 | 72 | 91 |
| The value for money for the price of your ticket | 70 | 64 | 84 |
| Cleanliness of the train | 79 | 75 | 80 |
| Upkeep and repair of the train | 74 | 74 | 78 |
| The provision of information during the journey | 72 | 67 | 82 |
| The helpfulness and attitude of staff on train | 94 | 82 | 97 |
| The space for luggage | 72 | 62 | 84 |
| The toilet facilities | 57 | 50 | 74 |
| Sufficient room for all passengers to sit/stand | 88 | 72 | 93 |
| The comfort of the seating area | 79 | 74 | 82 |
| The ease of being able to get on and off | 79 | 77 | 93 |
| Your personal security whilst on board | 88 | 81 | 93 |
| The cleanliness of the inside | 75 | 75 | 81 |
| The cleanliness of the outside | 68 | 70 | 85 |
| The availability of staff on the train | 89 | 70 | 94 |
| How well train company dealt with delays | * | 52 | 100 |
| Usefulness of information during delays | * | 51 | 61 |
| Station factors | | | |
| Overall satisfaction with the station | 75 | 81 | 82 |
| Ticket buying facilities | * | 77 | 82 |
| Provision of information about train times/platforms | 82 | 84 | 87 |
| The upkeep/repair of the station buildings/platforms | 68 | 75 | 79 |
| Cleanliness of the station | 78 | 82 | 88 |
| The facilities and services at the station | 55 | 57 | 69 |
| The attitudes and helpfulness of station staff | 79 | 83 | 97 |
| Connections with other forms of public transport | 67 | 66 | 88 |
| Facilities for car parking at the station | 74 | 62 | 90 |
| The overall station environment | 73 | 75 | 79 |
| Your personal security whilst using the station | 80 | 76 | 80 |
| The availability of staff at the station | 59 | 67 | 73 |
| The provision of shelter facilities | 78 | 71 | 79 |
| Availability of seating | 76 | 59 | 76 |
| How request to station staff was handled | * | 89 | 94 |
| The choice of shops/eating/drinking facilities available | 36 | 42 | 53 |

Building block score is five points or more below typology average
Building block score is five points or more above typology average

**A2.3 NRPS Autumn 2016: percentage satisfied, South Wales & Borders/West Wales building block, compared to Short commute typology average and best in class**

| Factor | South Wales and Borders / West Wales | Short commute | BIC |
|---|---|---|---|
| **Overall satisfaction with the journey** | 81 | 81 | 95 |
| Train factors | | | |
| Overall satisfaction with the train | 80 | 79 | 92 |
| The frequency of the trains on that route | 60 | 73 | 97 |
| Punctuality/reliability (i.e. the train arriving/departing on time) | 79 | 72 | 93 |
| The length of time the journey was scheduled to take (speed) | 81 | 82 | 97 |
| Connections with other train services | * | 76 | 90 |
| The value for money for the price of your ticket | 75 | 48 | 75 |
| Cleanliness of the train | 73 | 75 | 91 |
| Upkeep and repair of the train | 70 | 74 | 95 |
| The provision of information during the journey | 62 | 69 | 88 |
| The helpfulness and attitude of staff on train | 92 | 56 | 92 |
| The space for luggage | 71 | 53 | 71 |
| The toilet facilities | * | 29 | 58 |
| Sufficient room for all passengers to sit/stand | 68 | 65 | 81 |
| The comfort of the seating area | 83 | 71 | 84 |
| The ease of being able to get on and off | 82 | 78 | 91 |
| Your personal security whilst on board | 82 | 74 | 86 |
| The cleanliness of the inside | 77 | 76 | 90 |
| The cleanliness of the outside | 73 | 74 | 89 |
| The availability of staff on the train | 74 | 35 | 83 |
| How well train company dealt with delays | * | 32 | 64 |
| Usefulness of information during delays | * | 44 | 79 |
| Station factors | | | |
| Overall satisfaction with the station | 76 | 81 | 92 |
| Ticket buying facilities | * | 76 | 88 |
| Provision of information about train times/platforms | 71 | 81 | 91 |
| The upkeep/repair of the station buildings/platforms | 59 | 74 | 90 |
| Cleanliness of the station | 61 | 78 | 89 |
| The facilities and services at the station | 54 | 53 | 66 |
| The attitudes and helpfulness of station staff | 70 | 77 | 92 |
| Connections with other forms of public transport | * | 77 | 86 |
| Facilities for car parking at the station | * | 46 | 77 |
| The overall station environment | 63 | 72 | 86 |
| Your personal security whilst using the station | 64 | 73 | 83 |
| The availability of staff at the station | 61 | 67 | 88 |
| The provision of shelter facilities | 67 | 71 | 89 |
| Availability of seating | 48 | 52 | 75 |
| How request to station staff was handled | * | 83 | 100 |
| The choice of shops/eating/drinking facilities available | 40 | 42 | 58 |
| Building block score is five points or more below typology average | | | |
| Building block score is five points or more above typology average | | | |

## Appendix 3. Passenger priorities for station requirements and improvements

### A3.1 Facilities need providing, according to station footfall, GB stations

Free Wi-Fi at stations consistently required by station type

*Station improvements [prompted] – needs providing: All GB rail passengers*

| | | Station footfall | | |
|---|---|---|---|---|
| | | High | Medium | Low |
| Free WiFi at the station | 27% | 25% | 31% | 28% |
| Toilets | 21% | 9% | 40% | 41% |
| Litter bins | 18% | 22% | 10% | 17% |
| Cash point | 18% | 12% | 30% | 21% |
| Waiting rooms (i.e. fully enclosed waiting area) | 17% | 11% | 24% | 29% |
| Seating on platforms | 12% | 16% | 5% | 9% |
| Canopies over the platforms to stop you getting wet | 11% | 6% | 18% | 24% |
| Outlet selling tea/ coffee, sandwiches and snacks | 11% | 6% | 18% | 18% |
| Left Luggage facility | 10% | 10% | 10% | 8% |
| Point to collect goods ordered on the internet | 9% | 8% | 12% | 10% |
| Shop selling a small range of convenience items | 9% | 6% | 14% | 14% |
| Machine to collect train tickets ordered on the internet | 9% | 5% | 14% | 19% |
| Shelter on platforms (i.e. semi enclosed waiting area) | 8% | 7% | 10% | 10% |
| Automatic ticket gates | 6% | 5% | 9% | 9% |
| Other shops and facilities (e.g. florist, dry cleaners etc.) | 6% | 5% | 7% | 7% |
| Help point telephone (i.e. to speak to railway staff) | 6% | 5% | 8% | 9% |
| Departure information screens | 5% | 2% | 8% | 13% |
| Public address system | 4% | 3% | 4% | 10% |
| Other | 5% | 5% | 5% | 10% |
| Nothing extra needs to be Improved | 15% | 17% | 9% | 11% |
| Don't know | 17% | 20% | 11% | 8% |

29  Q.26b Still thinking only about the station where you were handed this questionnaire, which of the following station facilities need to be improved or need to be provided at this station? providing; Base: All GB Rail Passengers n=3,559

Passengerfocus
putting passengers first

### A3.2 Facilities need improving, according to station footfall, GB stations

Improvements to seating consistently important. Improving toilets important at high footfall stations, and shelter important at lower footfall

*Station improvements [prompted] – needs improving: All GB rail passengers*

| | | Station footfall | | |
|---|---|---|---|---|
| | | High | Medium | Low |
| Seating on platforms | 30% | 30% | 32% | 28% |
| Toilets | 20% | 26% | 9% | 7% |
| Litter bins | 17% | 19% | 13% | 14% |
| Shelter on platforms (i.e. semi enclosed waiting area) | 15% | 9% | 23% | 28% |
| Waiting rooms (i.e. fully enclosed waiting area) | 14% | 14% | 14% | 14% |
| Public address system | 13% | 13% | 12% | 12% |
| Departure information screens | 12% | 11% | 14% | 14% |
| Canopies over the platforms to stop you getting wet | 11% | 8% | 19% | 12% |
| Outlet selling tea/ coffee, sandwiches and snacks | 7% | 8% | 8% | 3% |
| Machine to collect train tickets ordered on the internet | 7% | 7% | 6% | 7% |
| Help point telephone (i.e. to speak to railway staff) | 6% | 6% | 4% | 10% |
| Automatic ticket gates | 5% | 8% | 2% | 3% |
| Cash point | 5% | 6% | 4% | 4% |
| Shop selling a small range of convenience items | 5% | 5% | 4% | 3% |
| Free WiFi at the station | 5% | 6% | 3% | 2% |
| Left Luggage facility | 3% | 4% | 1% | 1% |
| Other shops and facilities (e.g. florist, dry cleaners etc.) | 3% | 3% | 1% | 1% |
| Point to collect goods ordered on the internet | 2% | 2% | 1% | 2% |
| Other | 3% | 3% | 3% | 5% |
| Nothing extra needs to be provided | 13% | 14% | 10% | 9% |
| Don't know | 25% | 23% | 29% | 27% |

30  Q.26b Still thinking only about the station where you were handed this questionnaire, which of the following station facilities need to be improved or need to be provided at this station? Improving; Base: All GB Rail Passengers n=3,559

Passengerfocus
putting passengers first

69

## Appendix 4. Wales Passenger priorities for improvement by journey purpose/length/age

### A4.1 Priorities by journey length

| | Long distance | Difference | Short distance |
|---|---|---|---|
| Price of train tickets offers better value for money | 451 | 11 | 462 |
| Passengers always able to get a seat on the train | 473 | **107** | 366 |
| Trains sufficiently frequent at the times I wish to travel | 220 | 27 | 247 |
| Train company keeps passengers informed about delays | 146 | 34 | 180 |
| More trains arrive on time than happens now | 120 | **45** | 165 |
| Accurate and timely information available at stations | 123 | 25 | 148 |
| Less frequent major unplanned disruptions to journey | 107 | **40** | 147 |
| Fewer trains cancelled than happens now | 92 | 37 | 129 |
| Well-maintained, clean toilet facilities on every train | 119 | 19 | 100 |
| Inside of train is maintained and cleaned to high standard | 110 | 7 | 103 |
| Free Wi-Fi available on the train | 160 | **95** | 65 |
| Accurate and timely information provided on trains | 87 | 15 | 102 |

## A4.2 Priorities by journey purpose

| | Commuter | Business | Leisure |
|---|---|---|---|
| Price of train tickets offers better value for money | 491 | 485 | 434 |
| Passengers always able to get a seat on the train | 277 | 526 | 448 |
| Trains sufficiently frequent at the times I wish to travel | 279 | 220 | 219 |
| Train company keeps passengers informed about delays | 181 | 135 | 167 |
| More trains arrive on time than happens now | 202 | 109 | 128 |
| Accurate and timely information available at stations | 143 | 115 | 143 |
| Less frequent major unplanned disruptions to journey | 186 | 95 | 111 |
| Fewer trains cancelled than happens now | 158 | 83 | 99 |
| Well-maintained, clean toilet facilities on every train | 75 | 117 | 122 |
| Inside of train is maintained and cleaned to high standard | 83 | 115 | 117 |
| Free Wi-Fi available on the train | 99 | 161 | 82 |
| Accurate and timely information provided on trains | 101 | 80 | 98 |

## A4.3 Priorities by age

| | 16-34 | 35-54 | 55+ |
|---|---|---|---|
| Price of train tickets offers better value for money | 517 | 483 | 393 |
| Passengers always able to get a seat on the train | 286 | 375 | 517 |
| Trains sufficiently frequent at the times I wish to travel | 260 | 267 | 199 |
| Train company keeps passengers informed about delays | 167 | 170 | 171 |
| More trains arrive on time than happens now | 171 | 161 | 127 |
| Accurate and timely information available at stations | 136 | 141 | 145 |
| Less frequent major unplanned disruptions to journey | 157 | 142 | 110 |
| Fewer trains cancelled than happens now | 131 | 125 | 100 |
| Well-maintained, clean toilet facilities on every train | 81 | 96 | 134 |
| Inside of train is maintained and cleaned to high standard | 84 | 100 | 127 |
| Free Wi-Fi available on the train | 176 | 69 | 54 |
| Accurate and timely information provided on trains | 97 | 96 | 98 |

# Appendix 5. Arriva Trains Wales research – performance/priority matrices

## 5.1 Pre-Journey priorities – Arriva Trains Wales passengers overall



**IMPROVEMENT PRIORITIES**

**MAINTAIN**

Regular and convenient service schedules and frequencies

Clear/helpful information at the stations

Helpfulness of staff at stations

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

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

**LOWER PRIORITY**

**LOWER PRIORITY**

More

Importance

Less

More

Performance

**5.2 Pre-boarding priorities among Leisure and business Arriva Trains Wales passengers**



More

**IMPROVEMENT PRIORITIES**

Range and types of fares available

Regular and convenient service schedules and frequencies

Station links with other modes of transport

**MAINTAIN**

Clear/helpful information at the stations

Ease of 'at station' ticket purchasing process

Helpfullness of staff at stations

Ease of 'online' ticket purchasing process

Importance

Availability of staff at stations

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

Availablity of seating areas in the station

**LOWER PRIORITY**

**LOWER PRIORITY**

Less

More

Base size: 56

74

## 5.3 Pre-boarding priorities among Arriva Trains Wales commuters



**IMPROVEMENT PRIORITIES**

**MAINTAIN**

More

Importance

Less

Performance

Less ← → More

Range and types of fares available

Regular and convenient service schedules and frequencies

Clear/helpful information at the stations

Ease of 'at station' ticket purchasing process

Helpfullness of staff at stations

Availability of staff at stations

Ease of 'online' ticket purchasing process

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

Availablity of seating areas in the station

Station links with other modes of transport

**LOWER PRIORITY**

**LOWER PRIORITY**

Base size: 65

**5.4 On-board experience priorities for Arriva Trains Wales passengers overall**



More

Importance

**IMPROVEMENT PRIORITIES**

Clean and tidy train carriages

Availability of seating

Sufficient and clean toilets

Availability of staff on trains

Sufficient storage space for luggage

Facilities for relaxation/work: table, light, powerpoint etc.

Comfortable seating

Mobile phone signal

Easy to move around

Clear, timely communication during times of disruption

Clear/helpful information on train

Accommodation/assistance for disabled and elderly passengers

**MAINTAIN**

Feeling safe and secure

Helpfulness of staff on trains

Trolley service

On-board catering service

**LOWER PRIORITY**

**LOWER PRIORITY**

Less

Performance

More

Base size: 121

76

**5.5 On-board experience priorities for Arriva Trains Wales business/leisure passengers**



More

IMPROVEMENT PRIORITIES

MAINTAIN

Importance

Sufficient and clean toilets

Clean and tidy train carriages

Availability of seating

Clear, timely communication
during times of disruption

Helpfulness of staff on trains

Comfortable seating

Clear/helpful information on
train

Feeling safe and
secure

Sufficient storage space for
luggage

Accommodation/assistance for
disabled and elderly passengers

Mobile phone signal

Availability of staff on trains

Facilities for relaxation/work:
table, light, power point etc.

Easy to move around

On-board catering service

LOWER PRIORITY

LOWER PRIORITY

Trolley service

Less

More

Base size: 56

Performance

77

**5.6 On-board experience priorities for Arriva Trains Wales commuters**



More

**IMPROVEMENT PRIORITIES**                                                 **MAINTAIN**

Availability of seating

Clear, timely communication
during times of disruption

Feeling safe and secure

Helpfulness of staff on trains

Clean and tidy train carriages

Sufficient and clean toilets

E

Clear/helpful information on
train

A

D

B                    C

Importance

Facilities for relaxation/work:
table, light, power point etc.

Mobile phone signal

A: Accommodation/assistance for disabled and elderly
B: Storage for luggage
C: Availability of staff on trains
D: Comfortable seating
E: Easy to move around

**LOWER PRIORITY**

Trolley service

**LOWER PRIORITY**

On-board catering service

Less                                                                          More

Base size: 65

Performance