Williams Rail Review: what do passengers want?

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transportfocus

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1. Introduction

Over the past 20 years, there has been considerable investment in infrastructure and rolling stock, and more emphasis has been placed on customer service … yet too many people still do not get the service they deserve. So, Transport Focus welcomes the Williams Rail Review – it provides the opportunity to stop and think, and then to reform the structure and systems of the railway. This is such a complicated issue that it is all too easy to get lost in models and commercial frameworks and to lose sight of passengers. This must not happen – the needs of passengers must be at the heart of the review. The railway needs to be structured and governed in such a way that it can best deliver the services that passengers want.

In this, the first of several submissions, Transport Focus will set out what passengers have told us they want and how they want to be involved. This paper does not set out a new structure for the railway. It does, however, establish a number of criteria/characteristics that can, and should, be applied to whatever structure is selected. Transport Focus believes that this should provide a yardstick against which structures and frameworks can be measured.

2. Transport Focus evidence

Transport Focus has a wealth of research and data on passenger needs and aspirations:

- Passenger satisfaction
  Transport Focus consults over 50,000[1] passengers each year to produce the National Rail Passenger Survey (NRPS) – a network-wide picture of passengers' satisfaction with rail travel. Data goes back to 1999 so it forms a long time-series. This can be used to identify trends and to benchmark services both within a train company and between train companies; to measure improvements (for example, the impact of improvement work at stations[2]); and is also used to set service quality targets within a franchise. Further details can be found in Appendix 1.

- Passenger priorities for improvement
  In 2017 Transport Focus asked 12,800 passengers across the country to rank 31

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[1] National Rail Passenger Survey (NRPS). Transport Focus. 2018.
[2] National Station Improvement Programme. Transport Focus. 2012.

possible improvements to their rail service in order of priority[3]. As well as the rank order, this research also shows the relative importance of each criterion – for example by how much more, or less, important one factor is when compared to another. Further details can be seen in Appendix 2.

- Bespoke passenger research
  Transport Focus has a raft of research covering all aspects of a passenger's journey from planning, to buying a ticket, and travelling on the train. Appendix 4 lists the main Transport Focus research reports against each of the key journey components – for example planning a journey, buying a ticket, experience on the train et cetera.

Read together, these complementary studies provide a unique perspective on rail passenger needs and provide hard evidence to inform decisions to be made for the future.

3. Implications for the review

Throughout all of this research work, a number of key themes continually stand out:

a) the importance of the 'core product'
b) effective management of disruption
c) value for money
d) accountability and transparency.

a) The 'core product'

The results of Transport Focus's research on priorities and passenger satisfaction continually emphasises the importance of an affordable, punctual, reliable, frequent service on which you can get a seat or, at the very least, stand in comfort (see figure 1).

These form the 'core product' that passengers want to see improved. How well the industry delivers these core attributes goes a very long way in determining how passengers view the railway. The core product is key in determining passenger satisfaction and also underpins the extent to which passengers 'trust' the railway. Transport Focus's research[4] identified a hierarchy of customer needs (figure 2). It found that a dependable, consistent, value for money product was the key building block that underpinned trust.

[3] Rail Passengers' Priorities for Improvement. Transport Focus. 2017.
[4] Passengers' Relationship with the rail industry. Transport Focus. 2014.

Figure 1

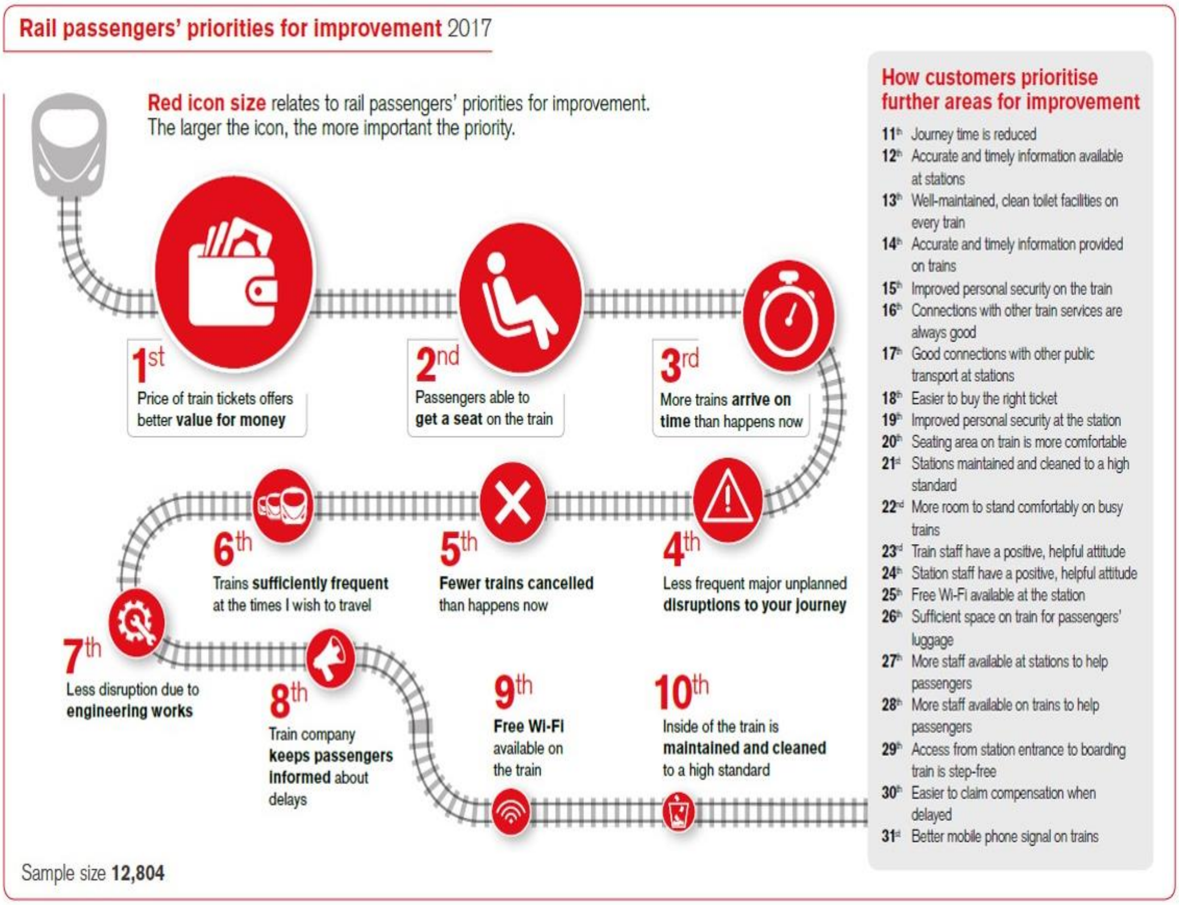
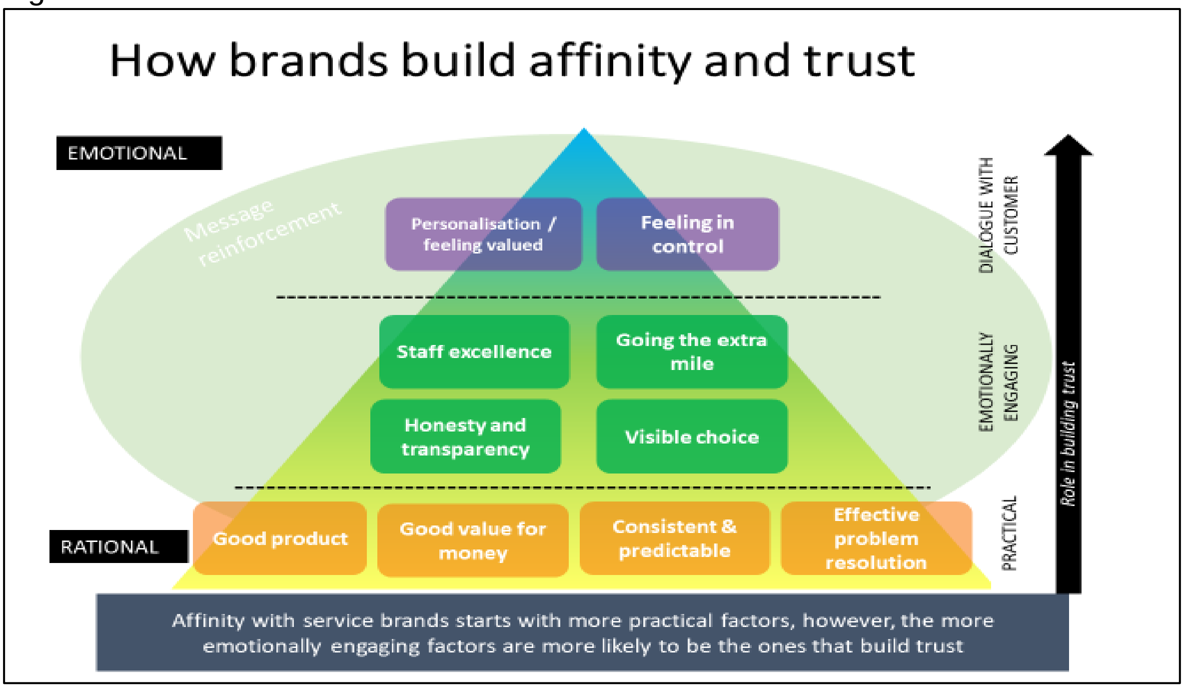


Figure 2



It would be too simplistic to attribute all the problems experienced by passengers to an over-complicated industry structure. However, there are some structural issues that do need to be addressed.

i) *Aligning industry incentives on the passenger.*
The current system is complex and involves various parties working together to deliver services. The better these parts work together the better the chance of those services being delivered well. However, it is clear that the incentives and targets currently used do not always achieve this.

A recent report into performance on South Western Railway provides a case in point. The independent review[5], chaired by Sir Michael Holden, states:

"Unfortunately we have a position today where the incentives are clearly non-aligned. Network Rail's objectives are set for it through each Control Period by the Rail Regulator (ORR), whereas South Western Railway's objectives are set through its franchise agreement. Whilst there is obviously some extent to which these objectives are pointed in the same general direction, they do not dovetail explicitly at all."

The report argues that the most obvious area where alignment would be highly desirable is that of performance. It shows how the punctuality standards agreed as part of the franchise agreement (set in 2016) are considerably higher than Network Rail's draft targets in its Strategic Business Plan (in 2018). Holden concludes:

"The net result of the different way that objectives and incentivisation are set for both the two key parties is to create a serious misalignment between them. The extent of this misalignment closely matches the difference between a clearly unacceptable level (87.5%) and a broadly acceptable level of performance (92.5%) for this railway. The fact that both NR and the franchisee are both under the direct control of DfT means that it ought to be possible to ensure much closer alignment of key objectives".

Transport Focus believes, however, that it is not just a case of aligning Network Rail and train company incentives, they must also be aligned with passenger priorities.

For example, it is simpler (and safer) for the people doing engineering work to impose an 'all line block' and to provide bus replacement services instead – something that has become part of operational culture, despite the fact that

[5] South Western Railway Independent performance review. 2018. Pages 37-38.

many passengers simply will not travel if a replacement bus is involved. So, from a passenger perspective, we believe the default assumption should be that routes remain open while work takes place. Clearly, exceptions will be made where there is compelling need, but the default ought to be to do that which is best for passengers rather than easiest for the railway. Industry incentives, behaviours and processes should, therefore, be designed to reflect this partiality towards the needs of passengers and to deliver this.

Incentives influence behaviour – if they do not, then they are not working. If the railway wishes to put the passenger first, then it is crucial that:

- all parties to pull in the same direction
- the targets and incentives used encourage the outputs and behaviours that passengers want to see in the first place.

ii) Designing metrics and monitoring systems that make sense to passengers and drive behaviours that passengers want to see.

Having established passenger-centric measures, you then need to develop metrics and systems that allow you to monitor delivery. These measurements need to make sense to passengers and drive the behaviours that they want to see. This includes:

- *Specific targets for punctuality and cancellations*

  The choice of performance targets, measurements and degree of transparency can all help generate trust with passengers and the wider public. The traditional measure of punctuality – known as Public Performance Measure (PPM) – is based on arrival times at the final station and allows a five or 10-minute leeway before trains are considered late. This does not match passengers' own experiences nor how they think about punctuality: for instance *they* might be late arriving at an intermediate station but the *train* be classed as on time when it arrives at its final destination. To the customer this is a fail and yet the measure (and the system) records it as a pass.

  In 2010 Transport Focus started looking at passengers' experience of delay and how that corresponded to official PPM figures. The work explored in detail the correlation between passenger satisfaction with punctuality as measured by the NRPS for a three to four-year period and actual train performance recorded by the train company over the same period. An initial study was conducted on London commuter services with (the then) National Express East Anglia, with three further studies in subsequent years carried out on Northern Rail regional commuter services (into and from Manchester) and on longer distance journeys with CrossCountry and East Coast. Just recently this work has also been refreshed looking at Greater Anglia[6].

This research found that, on average, passenger satisfaction with punctuality reduces by between two and three percentage points with every minute of delay. Commuters (except those travelling long distances) notice lateness after one minute of delay, not just after the five or ten minutes allowed by PPM. Their satisfaction with punctuality falls by an average of five percentage points per minute during the initial period of delay. Business, leisure users and long-distance commuters tend to change their level of satisfaction with punctuality after a delay of four to six minutes. So, a commuter train that is four minutes late may technically be on time, but passenger satisfaction will have dropped significantly. There is a clear passenger dividend from being on time, and yet there was nothing in the system to incentivise this.

This confirmed suspicions that PPM does not fully reflect passengers' own experience of delays. The closer the railway is managed to 'right-time', rather than PPM, the closer it will reflect passengers' perceptions. It also shows that there is a value in focusing on reducing small sub-threshold delays – for instance, reducing lateness of a train from four minutes to two minutes may not impact on PPM scores, but it will improve satisfaction.

In short, passenger-centric targets can generate passenger-centric behaviours. New measures of right-time performance monitoring will be introduced for Control Period Six – it will be important that these become the building blocks for any new industry systems and structures.

- *Targets for service quality*
  Traditionally, franchise targets were focused on relatively 'hard' measures such as punctuality and capacity. Transport Focus has long argued that service quality is also important - for instance, it is possible for a train company to meet its punctuality and cancellation targets while offering a poor passenger experience, for example dirty trains, unhelpful staff and poor passenger information.

  Transport Focus's strong preference is for targets based on what passengers think – the best judge of quality being those who have used the services in question. To this end, Transport Focus welcomes the use of passenger satisfaction targets within current franchise agreements[7]. If the train company fails to meet the required targets, it must produce an action plan designed to

[6] Train punctuality: the passenger perspective. Transport Focus. 2015.
[7] These currently use the NPRS carried out by Transport Focus.

rectify this failure and/or face a potential fine. This drives up the quality of service provided and also promotes a greater sense of accountability between service provider and consumer. This sense of accountability and transparency is enhanced when the body doing the monitoring is independent – any sense of the industry 'marking its own homework' will reduce the value of such targets.

Transport Focus believes that any new industry structure should continue to focus on service-quality targets. In a competitive market, the consumer will 'vote with his/her feet' if they do not like the quality of the product on offer. As long as there is little competition or choice within the rail sector, then there will be a need for some form of regulation to engender similar levels of accountability and responsibility.

As before, the crucial elements are that the targets reflect passenger priorities and that the measure reflects passenger experiences.

b) Effective management of disruption

The provision of high-quality and effective passenger information during disruption is vitally important.

The work of Transport Focus 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 passenger satisfaction where, typically, how well the operator dealt with delays is the highest driver of overall dissatisfaction with the journey.

In 2014 Transport Focus published research looking at passengers' needs and experiences during *unplanned* disruption, including around the provision of information[8]. This highlighted two key points that any new industry structure must address:

- Deficiencies in passenger information at times of disruption persist in a way that would not be tolerated if they concerned operational or safety failures. This is an enduring cultural problem, across the rail industry.
- Operators must measure on a robust and ongoing basis the quality of information provided during disruption. This could then form the basis of a target – to incentivise more communication and engagement around engineering work (which will potentially lead to happier – or at the least less dissatisfied – passengers).

[8] Passenger information when trains are disrupted, September 2014.

This challenge is not just limited to unplanned disruption. While passengers understand the need for engineering work, they do not like it – especially when it involves a bus replacement service. However, Transport Focus research on engineering work at Reading/Bath[9], at Waterloo[10] and at Derby[11] shows that giving passengers timely, accurate information can improve satisfaction levels with the way that planned disruption was managed. Higher awareness of disruption also leads to greater acceptance of the alternatives – they can cope better with disruption and bus replacements if they have been able to plan for it. There is, again, a passenger dividend from doing this that is unfortunately not reflected in the project 'balance sheet'.

c) Value for money

Transport Focus research shows that better value for money is the top priority for improvement among all rail passengers. This is not all down to price – it is clear from previous research[12] that judgements about value are influenced heavily by train punctuality and the ability to get a seat – although the cost of tickets clearly matters as well.

We also know that many passengers see the fares structure as complicated and confusing[13]. Issues with how tickets are sold mean that the confidence passengers have in their ability to buy the cheapest or best ticket for the journey they are making can be mixed. This uncertainty means that passengers can end up buying a more expensive ticket than they need, or worse, landing themselves in trouble with the train company by purchasing a ticket that is not valid for their journey. This issue was picked up in our *Ticket to ride*[14] reports, where Transport Focus argued that passengers should not be penalised for making an innocent mistake.

Transparent and fair ticket retailing is not just a 'nice to have' aspiration: there is a legal side to this too. Consumer law dictates that retailers should provide enough information for the consumer to make an informed decision on what to buy. They are not allowed to make any misleading statements or to omit key information.

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[9] Planned rail engineering work – the passenger perspective, December 2015.
[10] Railway engineering work: Putting passengers at the heart of the London Waterloo upgrade. Transport Focus. 2018.
[11] Derby resignalling works. Transport Focus. August 2018.
[12] Understanding drivers of passenger satisfaction with value for money, February 2009.
[13] Fares and Ticketing Study, February 2009.
[14] Ticket to ride, May 2012 and Ticket to ride – an update, February 2015.

Transport Focus joined with the Rail Delivery Group in launching a consultation in 2018 on reform of the fares and ticketing structure. The Williams Review provides an opportunity to build this reform package into any new structure.

Transport Focus would like to see a fare structure that offers:

- affordable flexibility
- an easier to understand structure
- easy ways to buy
- greater personalisation
- a system capable of catering to national and local needs
- consumer protection
- consumer confidence and trust.

Appendix 3 provides more detail on what a reformed fares system might mean/look like for passengers.

d) Accountability and transparency

Passengers want a sense that there is 'someone' in charge when it comes to service delivery[15]. They want someone to take overall responsibility for the railway and for this person/body to be accountable for decisions made and the quality of service provided.

One of the keys to accountability is transparency. Giving rail passengers access to information that matters to them will help them to hold the train company to account and to ask what is being done to improve services in return for the fares they pay.

Joint research undertaken by Transport Focus with the Office of Rail and Road (ORR) showed particularly that passengers want punctuality data that is relevant *to their journey* rather than a company-wide average[16]. Even when they admit it is unlikely they will read it themselves, they see the value in this data being available as it helps keep the operator on its toes. Indeed, the availability of accurate data may actually help the railway – a particularly bad journey can linger in the memory and distort passengers' perceptions. Accurate, relevant data can help challenge these negative perceptions.

An element of transparency is not enough on its own. Passengers also want a sense that their voice matters and that the person/body in charge is actually listening to them. Passengers should not be the passive recipients of major decisions made on their behalf behind closed doors.

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[15] Putting passengers at the heart of rail services. Transport Focus. 2004.
[16] Putting rail information in the public domain. May 2011. Transport Focus and ORR.

The ‘passenger power’ report[17] in 2013 argued for a much-increased voice for passengers in franchise replacements. Transport Focus called for passengers to:

- be consulted on what services were to be specified in a franchise
- be given a clear statement setting out franchise commitments and any targets and then regular progress reports to provide greater accountability and transparency
- have their voice to count through the life of that franchise.

Engagement has undoubtedly improved since then. Public consultation documents and stakeholder events, customer reports setting out promises and delivery against them, and the use of passenger satisfaction targets within franchises have all increased levels of accountability.

This needs to continue – but there is considerable scope to widen passenger engagement beyond franchising. In its submission to the Bowe report[18], Transport Focus set out the need to engage more with passengers when it came to major enhancement programmes. That report acknowledged there was engagement – passenger views and user priorities were sought and considered at the start of the High Level Output Specification process and via the various ‘route studies’ carried out by Network Rail. It also noted the ORR’s pubic consultation as part of the Control Period process.

However, the Bowe report also found:

“…there is less evidence that passenger and user views are fed into the planning of how enhancements should be delivered, as distinct from what those enhancements should be. In most cases, the delivery of enhancements involves disruption to existing services, either via short term possessions of the network, longer term closures and diversions or, as at London Bridge during the Thameslink works, extensive modifications to service patterns.

“The failure to engage effectively with users in this planning of delivery has had two impacts. First, it can be seen as contributing to cost escalation, via inefficient planning of possessions and the associated performance payments required to operators through their track access agreements with Network Rail. And second, it may contribute to passenger dissatisfaction on the occasions when things do go wrong.”

[17] Giving Passengers a Voice in Rail Services. Transport Focus 2013.
[18] Dame Colette Bowe’s review of the planning of Network Rail’s enhancements programme for Control Period 5, from 2014 to 2019. 2015.

The Shaw[19] report into the future shape and financing of Network Rail reached similar conclusions – it also acknowledged the need to give 'users' a say in the planning process. Shaw envisaged a process where stakeholder panels would feed into the planning decisions made within each Network Rail route. The report suggests that the route board and stakeholder panel:

"…should work together to oversee all enhancements planning at route level and make recommendations for both desirable outcomes and specific projects, drawing on the strategic priorities set out in the government's long-term vision for rail. The stakeholder panel and the alignment between enhancement strategies and the wider route-based action plans provides stakeholders with a way of holding the route board to account for planning and delivery, and would also be able to make suggestions to the route board on a variety of issues, including whether to accept or reject third party funded proposals, how best to monitor progress on pre-existing enhancements projects, and when and how to carry out ex-post reviews of completed enhancements projects."

This is not just a 'nice to have' aspiration. Transport Focus research constantly demonstrates the value of involving passengers and the resulting benefits that accrue to the industry. The value of engaging passengers in the engineering work at Reading/Bath, Waterloo and Derby was mentioned above. Another good example surrounds the design of new rolling stock. Transport Focus has been working with Merseytravel to gather the views of passengers on the design of their new rolling stock[20]. The end result will be a train that better meets the needs of those who will use it. The principle (and value) of engaging passengers in the design of new trains is also recognised by the National Audit Office[21].

The Glaister[22] report into the May 2018 timetable crisis clearly shows that there is still a need to resolve the question of who is in charge. However this is addressed, it will be essential that the passenger voice is not silenced. At both a strategic and a delivery level, greater accountability requires high-level, dedicated consumer representation and genuine passenger involvement in all relevant issues. Without this, the passenger voice will always be drowned out.

Transport Focus has identified a number of areas within the current structure where there is scope for engagement – many of which are already successfully in place and will need to be transplanted into any new structure. This is set out in more detail in Appendix 5.

[19] Nicola Shaw's report into the future shape and financing of Network Rail. 2016.
[20] Future Merseyrail rolling stock – what passengers want. Transport Focus. 2014.
[21] Improving passenger rail services through new trains. NAO. 2004.
[22] Independent Inquiry into the timetable disruption in May 2018. ORR. 2018.

4. Next steps

The Rail Review provides an opportunity to put passengers at the heart of the decision-making process. In this submission, Transport Focus has set out some high-level aspirations and suggested ways in which these can be embedded into any new industry structure.

A separate submission will follow setting out the views and aspirations of non-users – since it is vital that any new structure also looks to attract future passengers as well as those who already use the railway.

Alongside this, Transport Focus is also undertaking some new research looking at passengers' attitudes to the existing structure of the rail industry and how they think services should be provided and delivered in future. These results will also be fed into the review team.

5. For further information

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APPENDIX 1 - Passenger satisfaction

Transport Focus consults over 50,000 passengers a year to produce the National Rail Passenger Survey (NRPS) – a network-wide picture of passengers' satisfaction with rail travel. Data goes back to 1999 so it forms a long time-series. It can be used to identify trends and to benchmark services both within a train company and between train companies; to measure improvements (for example, the impact of improvement work at stations[23]); and is also used to set service quality targets within a franchise.

Transport Focus sees a clear distinction in overall satisfaction level by journey purpose, with commuters – especially those in London and South East – least satisfied. Full details of the spring 2018 wave can be found on the Transport Focus website[24]. The autumn 2018 wave will be published on 29 January 2019.

Punctuality by journey purpose - % satisfied - Spring 2018

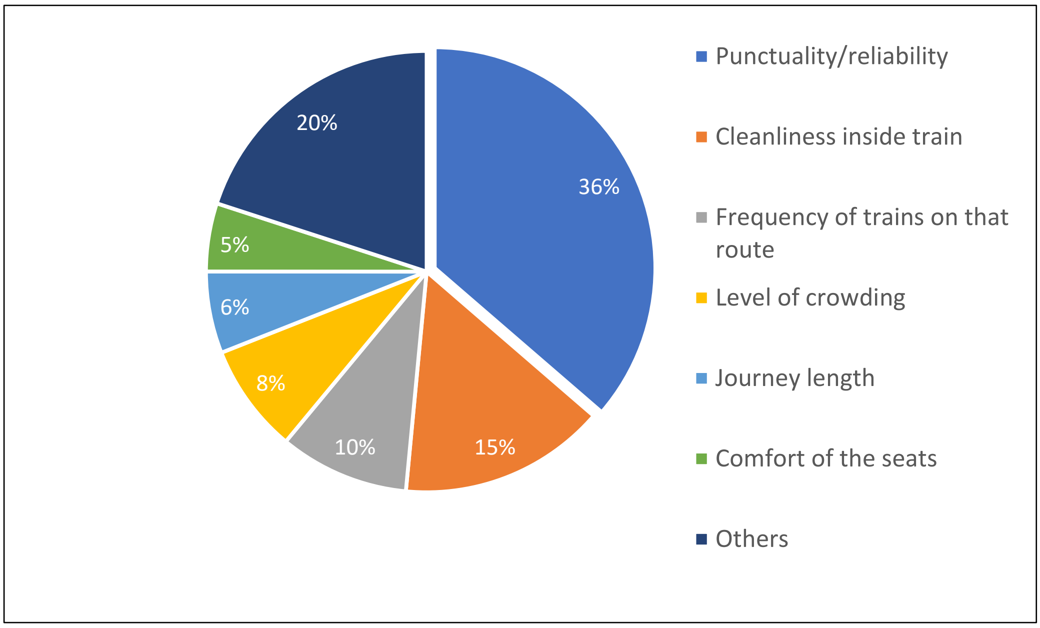
Using regression analysis, it is also possible to identify those factors that correlate most highly with overall satisfaction and dissatisfaction. This shows punctuality is the biggest single driver of satisfaction, and how the industry manages delays is the biggest driver of dissatisfaction (see figure 3, overleaf).

It is clear that punctuality is one of the fundamental issues that underpins passengers' perceptions of the railway. Delivering a punctual and reliable service is essential. This makes the way that the railway measures punctuality – in a way that is meaningful and trusted by passengers – all the more important.

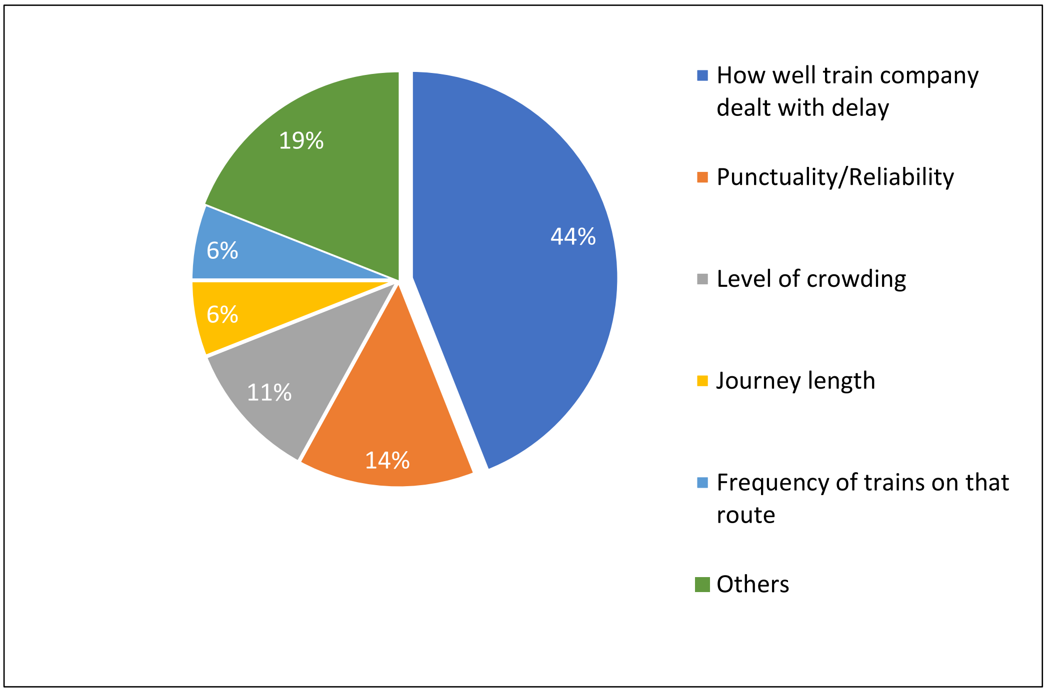
23 National Station Improvement Programme. Transport Focus. 2012.
24 https://www.transportfocus.org.uk/research-publications/publications/national-rail-passenger-survey-nrps-spring-2018-main-report/

Figure 3

Drivers of satisfaction (% of overall satisfaction explained by factor)
NRPS Autumn 2017/Spring 2018

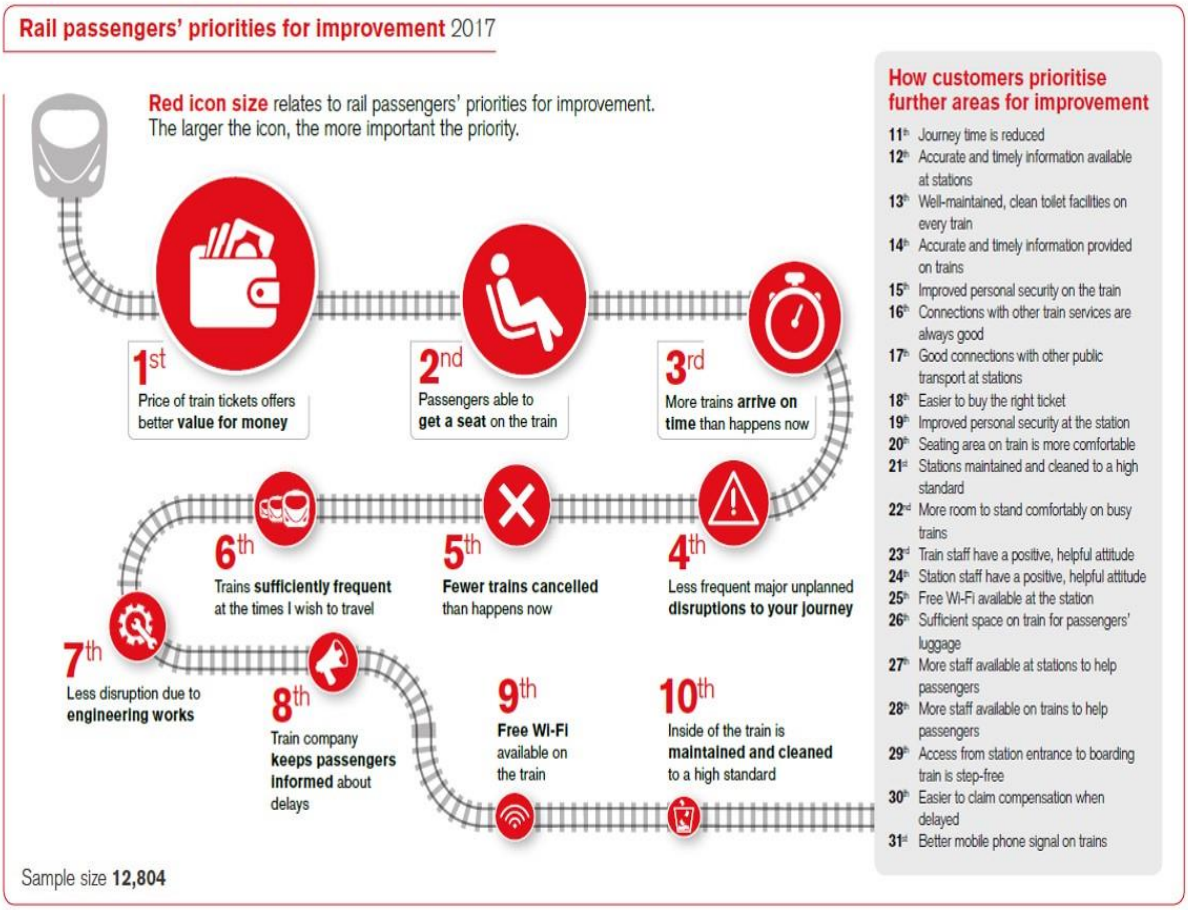


Drivers of dissatisfaction (% of overall satisfaction explained by factor)
NRPS Autumn 2017/Spring 2018



APPENDIX 2 - Passenger priorities for improvement

In 2017 Transport Focus asked more than 12,800 passengers across the country to rank 31 possible improvements to their rail service in order of priority.



As well as the rank order, the research also gives a sense of the relative importance of each criterion – for example by how much more, or less, important is one factor compared to another (see figure 4).

The results emphasise the importance of what can be termed the 'core product' – an affordable, dependable service on which you can get a seat. From the index scores one can see the highest priority for improvement by some margin is value for money. While clearly linked to the price of tickets, it is known from previous research[25] that value for money is also heavily influenced by train punctuality, the ability to get a seat and the quality of information when the service is disrupted.

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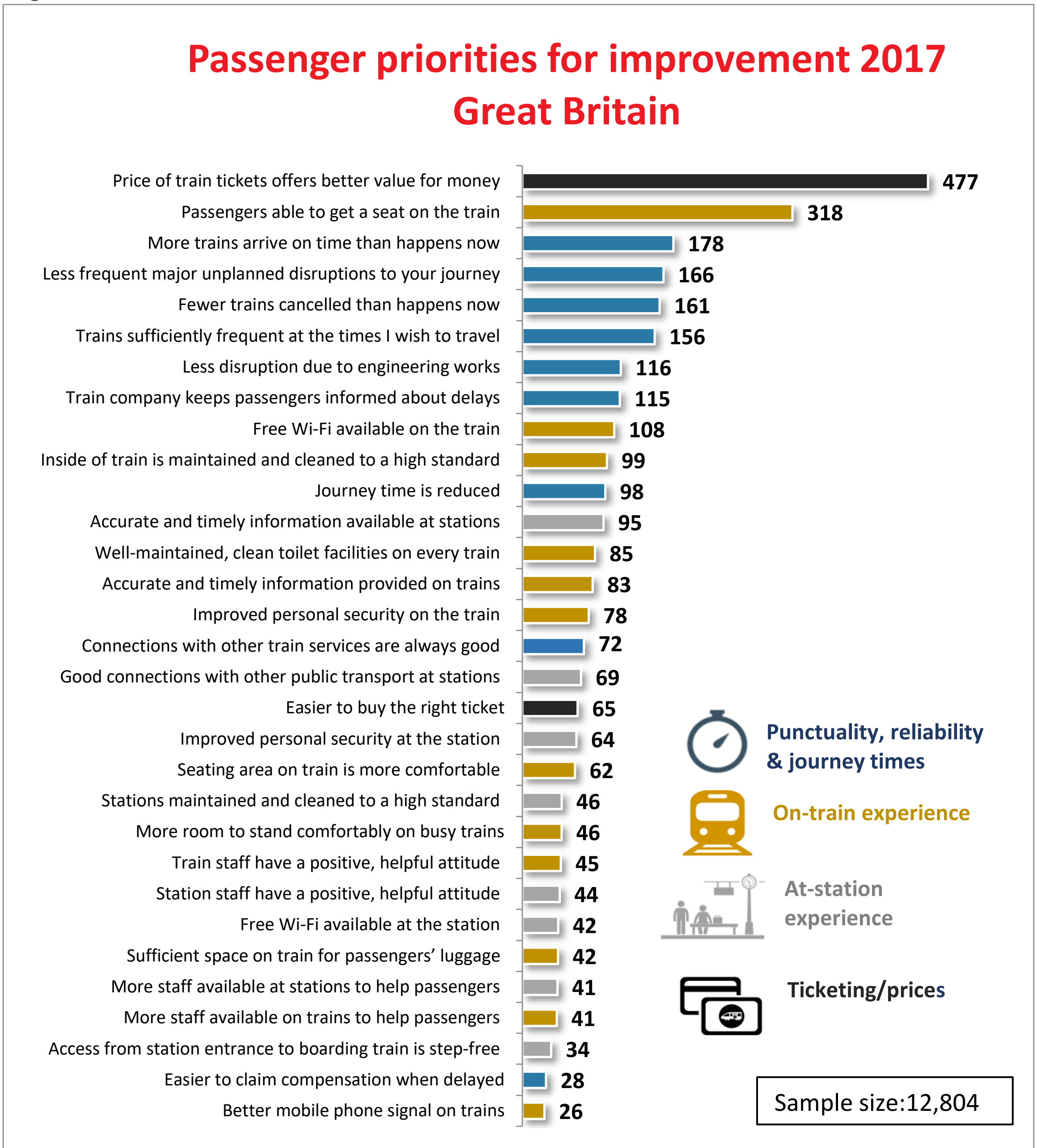
[25] 'Fares and Ticketing Study' . Transport Focus. 2012.

Value for money is followed by core service attributes – getting a seat, reliability, punctuality and frequency – and then by good information (both generally and during times of disruption).

Figure 4



To assess the relative ranking, we use an index score with 100 being average importance, so anything ranked over 100 has above average importance and anything below 100 has less than average importance. For example, an index of 150 means that it is 50 per cent more important than average; a score of 300 means it is three times as important as average; while a score of 50 means that it is half as important as average.

The 'priorities for improvement' research can also be broken down by region, train company, route and journey purpose, as well as by demographics (for example age and disability)[26].

There is a clear distinction between the priorities expressed by commuters, business and leisure passengers. While the rank order is virtually the same for all passengers – with value for money being the number one priority for improvement, followed by getting a seat – it is clear from the index scores that journey purpose makes a difference in terms of the *relative level* of priority.

For example, getting a seat is the second highest priority for improvement for commuters, business and leisure passengers. However, the index scores show that getting a seat has a higher relative importance to leisure passengers (index score of 367) than for business (321) and commuters (289).

As might be expected, commuters place a higher relative importance on performance and cancellations than do other passengers:

- more trains arrive on time than now: commuters 196, business 169 and leisure 149
- less frequent unplanned disruptions to your journey: commuters 182, business 160, leisure 141
- fewer cancellations: commuters 180, business 152, leisure 132.

Business passengers place a higher relative importance on Wi-Fi on board the train. They gave the provision of free Wi-Fi on board a score of 146 against 109 for commuters and 90 for leisure.

In effect, there is a trade-off between capacity and performance. For commuters there is a bigger sense of 'just get me there', perhaps recognising the reality that seats will not always be available at peak times. For leisure and business passengers there is more of an emphasis on the quality of the journey – meaning seats and the provision of Wi-Fi are higher priorities than the national average.

Commuters, in particular, put a huge emphasis on dependability. They do not look to a set of 'nice-to-have' aspirations, rather they continually emphasise the importance of robust, consistent, reliable delivery of the core basics.

The following table compares relative importance by journey purpose.

[26] https://www.transportfocus.org.uk/research-publications/publications/rail-passengers-priorities-for-improvement/

Rail passengers' priorities for improvement - by journey purpose							
	GB	Commuter		Business		Leisure	
	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers better value for money	477	1	438	1	528	1	525
Passengers able to get a seat on the train	318	2	289	2	321	2	367
More trains arrive on time than happens now	178	3	196	3	169	3	149
Less frequent major unplanned disruptions to your journey	166	4	182	4	160	4	141
Fewer trains cancelled than happens now	161	5	180	5	152	6	132
Trains sufficiently frequent at the times I wish to travel	156	6	167	6	150	5	138
Less disruption due to engineering works	116	7	128	8	111	10	97
Train company keeps passengers informed about delays	115	8	117	9	106	8	114
Free Wi-Fi available on the train	108	10	109	7	146	13	90
Inside of train is maintained and cleaned to a high standard	99	12	87	11	102	7	120
Journey time is reduced	98	9	110	10	105	16	73
Accurate and timely information available at stations	95	11	98	13	88	11	94
Well-maintained, clean toilet facilities on every train	85	14	74	12	89	9	104
Accurate and timely information provided on trains	83	13	86	14	77	14	80
Improved personal security on the train	78	15	73	18	63	12	92
Connections with other train services are always good	72	16	73	17	66	17	73
Good connections with other public transport at stations	69	17	71	19	62	19	68
Easier to buy the right ticket	65	20	58	15	68	15	76
Improved personal security at the station	64	18	62	20	53	18	71
Seating area on train is more comfortable	62	19	58	16	67	20	66
Stations maintained and cleaned to a high standard	46	23	45	22	45	21	49
More room to stand comfortably on busy trains	46	21	52	23	44	28	37
Train staff have a positive, helpful attitude	45	24	44	24	42	22	49
Station staff have a positive, helpful attitude	44	25	43	26	41	23	47
Free Wi-Fi available at the station	42	22	47	21	48	29	31
Sufficient space on train for passengers' luggage	42	27	39	25	42	24	47
More staff available at stations to help passengers	41	26	41	27	35	26	45
More staff available on trains to help passengers	41	28	39	28	35	25	45
Access from station entrance to boarding train is step-free	34	30	30	30	28	27	42
Easier to claim compensation when delayed	28	29	32	31	28	30	20
Better mobile phone signal on trains	26	31	29	29	29	31	18
Sample size		2976		1298		8496	

To assess the relative ranking, we use an index score with 100 being average importance, so anything ranked over 100 has above average importance and anything below 100 has less than average importance. For example, an index of 150 means that it is 50 per cent more important than average; a score of 300 means it is three times as important as average; while a score of 50 means that it is half as important as average.

APPENDIX 3 – Strategic outcomes from the fares review: a passenger checklist for assessing proposals

Strategic outcome	What does that mean for customers
Affordable Flexibility	Preserve the walk-up element of rail travel. Flexibility is tradable for price – with the caveat that flexibility remains affordable (in a way that long distance Anytime tickets are not). Ability to exchange/change tickets prior to departure. Easy to obtain a refund for an unused ticket (where applicable). Increased access to the discounts offered by annual season tickets – for example Direct Debit payment schemes.
Easier to understand structure (informed purchase)	Remove anomalies/ inconsistencies: for example two singles may or may not be more expensive than a return, a through ticket more expensive than re-booking on-route; an Anytime ticket is sometimes the only ticket available Provide relevant information at all points of purchase (station, ticket vending machine, web, app) – people need to know what they are buying (price, validities, restrictions and seat reservations). But simplicity should <u>not</u> be used as an argument to severely limit choice. If the product range is good and/or you can personalise products, then people will be willing to accept some complexity in exchange for more choice.

Easy to buy	Choice of outlets: how I want, when I want. Broad consistency of retail terms and conditions across purchase methods (for example why are refunds available via one purchase mode but not another?). Expansion of digital channels – but with the caveat that a 'safety-net' remains for those who cannot/will not move to digital.
Greater personalisation	The ability to buy the right product that matches the way I want to travel. Not paying for something I am not going to use (for example a weekly season when I only want to travel three days; an Anytime return when I am returning in the off-peak). Ability to 'bundle' other purchases into the transaction if I wish – for example multi-modal elements, food/drink, car parking. It is acknowledged that there is potential conflict between additional choice and complexity – this can partly be offset by clear information at the point of purchase.
A system that can cater to national and local needs (one size does not fit all)	A range of national products to ensure some consistency and to generate a sense of 'network' (which is how most passengers still see the railway). Local/regional products that meet the needs of that community (for example local authority products, community rail offers). The ability to use fares to stimulate demand/fill up seats where there is spare capacity and to attract 'non-users' to rail. Systems that can help promote better planning of services (for example more

	sophisticated data capture showing how many passengers are on a particular train).
Consumer protection	Pure commercial considerations offset by the need for social pricing (such as recognising vulnerable consumers and the furtherance of government social policies). Captive passengers (meaning limited ability to change mode or time of travel) protected by regulation.
Consumer confidence and trust	Price promise – coupled with refunds if overpaid. If a passenger has a ticket that is not valid for the train they boarded, the sum paid already should count towards the new ticket they need to buy. Price capping – meaning caps for travel at a fixed amount (for example Oyster/pay as you go in London). Must address 'split ticketing' – the biggest elephant in the room when it comes to consumer confidence Good awareness of, and easy to claim, compensation for delays

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