



# **Scottish passengers' priorities**

**June 2014**

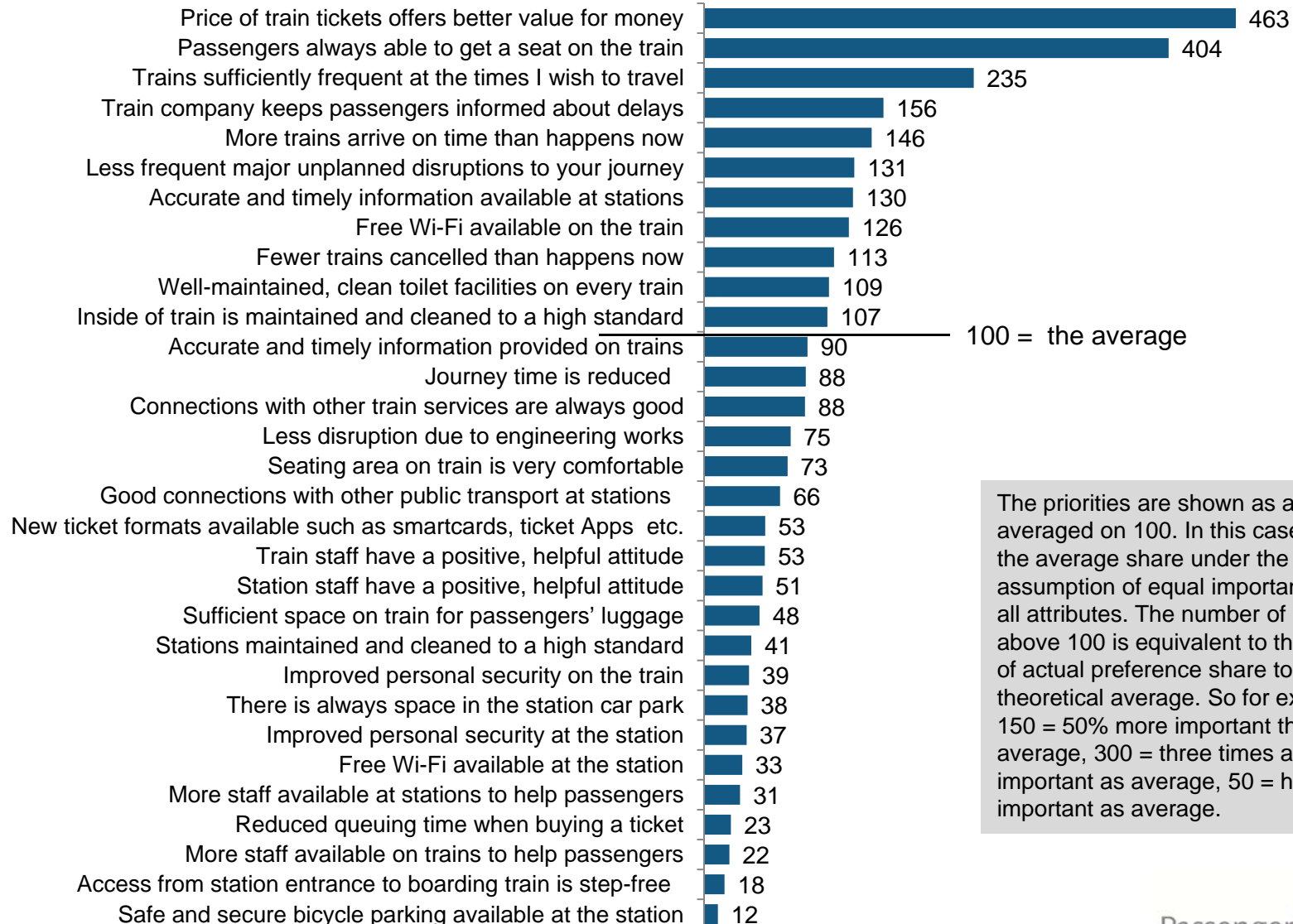
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## National Rail Passenger Survey

- Approximately 55 stations covered each wave (each spring and autumn)
- Minimum sample size of 1,000 passengers each wave
- The key driver of passenger satisfaction in 2013 was punctuality/reliability
- Self-completion questionnaires are given to passengers about to make a journey at several stations, selected to be representative of the ScotRail network. Some questionnaires on rural lines also given out on train
- Other main drivers are cleanliness of the inside of the train, value for money, and ease of being able to get on and off the train
- Overall satisfaction is consistently between 86% and 90% and ScotRail is generally a better performing TOC on most factors.

# Top 3 priorities - value, getting a seat and sufficient trains

## *Priorities for improvement – rank order indexed to 100: Passengers in Scotland*



The priorities are shown as an index averaged on 100. In this case 100 = the average share under the assumption of equal importance of all attributes. The number of points above 100 is equivalent to the ratio of actual preference share to this theoretical average. So for example 150 = 50% more important than average, 300 = three times as important as average, 50 = half as important as average.

# Priorities show more variation by journey purpose

## *Priorities for improvement – rank order indexed to 100: by journey purpose*

	TOTAL (All)		Commuter		Leisure		Business	
Price of train tickets offers better value for money	463	1	510	1	424	2	477	2
Passengers always able to get a seat on the train	404	2	294	2	454	1	517	1
Trains sufficiently frequent at the times I wish to travel	235	3	276	3	208	3	222	3
Train company keeps passengers informed about delays	156	4	170	5	150	4	143	5
More trains arrive on time than happens now	146	5	178	4	128	7	124	6
Less frequent major unplanned disruptions to your journey	131	6	162	6	113	10	110	10
Accurate and timely information available at stations	130	7	137	8	126	8	123	7
Free Wi-Fi available on the train	126	8	108	9	134	5	145	4
Fewer trains cancelled than happens now	113	9	138	7	100	11	96	11
Well-maintained, clean toilet facilities on every train	109	10	76	15	131	6	113	8
Inside of train is maintained and cleaned to a high standard	107	11	86	13	121	9	113	9
Accurate and timely information provided on trains	90	12	96	11	87	13	84	12
Journey time is reduced	88	13	105	10	78	15	84	13
Connections with other train services are always good	88	14	79	14	96	12	83	14
Less disruption due to engineering works	75	15	91	12	68	17	60	16
Seating area on train is very comfortable	73	16	51	18	87	14	79	15
Good connections with other public transport at stations	66	17	60	17	73	16	59	18
New ticket formats available such as smartcards, ticket Apps, print at home etc.	53	18	69	16	45	22	43	21
Train staff have a positive, helpful attitude	53	19	47	20	58	19	52	19
Station staff have a positive, helpful attitude	51	20	46	21	55	20	48	20
Sufficient space on train for passengers' luggage	48	21	32	25	63	18	39	22
Stations maintained and cleaned to a high standard	41	22	35	24	46	21	39	23
Improved personal security on the train	39	23	37	22	41	23	38	24
There is always space in the station car park	38	24	49	19	23	28	60	17
Improved personal security at the station	37	25	35	23	39	24	35	25
Free Wi-Fi available at the station	33	26	30	26	36	25	31	26
More staff available at stations to help passengers	31	27	29	27	35	26	25	27
Reduced queuing time when buying a ticket	23	28	26	28	23	29	20	28
More staff available on trains to help passengers	22	29	20	29	24	27	18	29
Access from station entrance to boarding train is step-free	18	30	17	30	21	30	10	30
Safe and secure bicycle parking available at the station	12	31	12	31	13	31	9	31

## Bus Passenger Survey

- It is a survey of an actual journey experience – not a general view of bus services nor a household survey on bus travel
- 19 English authority areas, 34 English area-operators, and for the first time Lothian and First Glasgow joined survey
- 34000 passengers responses – a substantial survey
- Lothian achieved highest result of all operators surveyed for both overall satisfaction at 96%, and value for money at 79%.
- First Glasgow achieved a very commendable 91% for overall satisfaction and 71% for value for money
- Response rates to the survey in these areas – in Edinburgh the response rate was a huge 55% and Glasgow 45%.

# Methodology and sample

The sampling locations were selected by Transport Scotland to provide a representative picture of Scotland

## Paisley

Three local rail stations, buses and airport link with good car/taxi/ walking/ cycling integration

## Perth

Typical example of a rail-rail interchange. Anecdotally perceived to be poorly integrated with bus service and town centre

## Dunbar

Passenger profile is close to that of many stations across the rail network. Serves Edinburgh commuter and leisure

## Aviemore

Feeder station for Inverness and beyond. Strong tourist profile

**8 x 1½ hr groups with passengers - 2 in each location**

(6 respondents per group aged 18-65, mixed social grade and gender)

Group 1. Frequent and semi-frequent rail travellers

Group 2. Infrequent and rare rail travellers – who were also asked to make a rail journey before the group

# Rail travel is different from car travel but does have its own benefits and motivations. These need to be made more overt for less regular/ non rail users

The benefits of car travel are the default benchmark of what 'good travel' is but it has its own specific benefits and disadvantages

Rail travel is often considered 'worse' than car travel - or at best, a forced compromise due to this benchmark

The benefits of rail travel are specific (*activities, headspace and devolved autonomy*) and are based on real passenger travel needs (*convenience, speed/time and cost*) – this is currently being undermined by poor delivery of these benefits

Positively differentiating rail travel (as part of integrated travel) via the positive benefits + credible travel needs will help to make integrated travel a positive choice that is not directly comparable with car travel:

**Positive, Credible, Differentiated**

# Credibility and quality are central to re-appraisal and commitment to integrated travel as a 'positive choice'

Expectations are low and needs are high within integrated travel and so actual experiences can be deal breakers

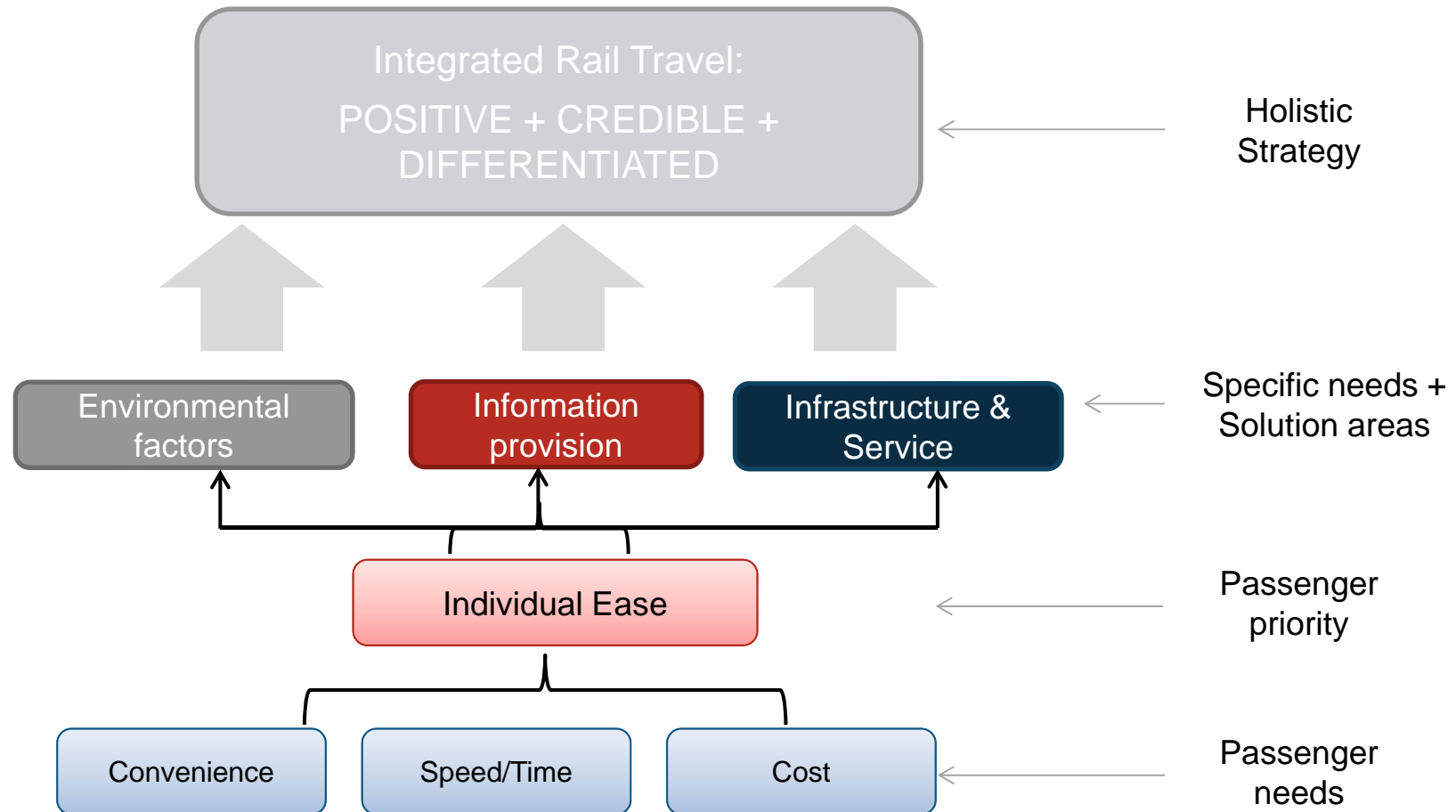
Potential passengers will not 'see' the benefits unless the offer tangibly meets their core need - 'Individual Ease' - via cost, convenience and speed/time

The balance of priorities and benefits of integrated travel is currently weighted towards transport providers – passengers have to do all the work with very little benefit (perceived or real)

Taking a holistic approach, will ensure that leisure, commuter, business travellers, in differing transport areas, all benefit and are enabled to choose alternatives to the car – without a sense of compromise



# In summary, an integrated travel strategy informed by passenger needs and rail benefits is required





## Edinburgh Waverley Station improvements research

Passengers are **aware of almost all the improvements begun** at Waverley station and the most commonly recognised improvements (the new roof and floor surfaces) have **made a positive impact** on passengers' experience of the station

There is **further room for improvement**, even where improvements had been noticed and especially where **getting around the station** and **finding your way** around the station are concerned

Signage

Access

Particularly problematic for  
**business passengers and  
commuters**

The main issues relate to **accessing (and access between) platforms**, and understanding the **platform numbering system** rather than issues with the main concourse. This can be overcome with clearer **signage** that passengers can see and use quickly whilst getting to their train

Some passengers, feel let down by the **provision of information** particularly at times of **disruption**. There is room for improvement where the **helpfulness of staff** is concerned and the **clarity of announcements** made over the tannoy