Northern and TransPennine franchises – passenger research

November 2012
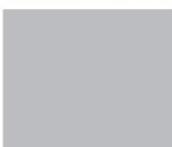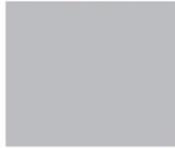
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Contents

Foreword

When new franchises are let, Passenger Focus believes it is vital that the views of passengers who use the railway are placed at the heart of the contract. We undertook a qualitative study with passengers on Northern and TransPennine Express (TPE) services to examine their views of the current operations and to identify the issues that the new franchise should address.

In recent years we have gathered considerable data about passenger priorities for rail improvements, and found them to be broadly consistent across different parts of the country and passenger markets. Through the National Passenger Survey (NPS) and other research we also have a wealth of information about passenger perspectives on many aspects of rail services.

This report combines the new, qualitative research with our existing knowledge of passenger satisfaction and priorities for improvement. In normal circumstances we would have used these to produce an interim report to the Department for Transport setting out the key recommendations that any new franchise agreement should include. However, the pause in the franchising programme (pending the review of the West Coast franchise and the wider review of franchise policy) has changed timescales.

Rather than keep the research 'on the shelf' for the foreseeable future we wanted to publish our workings in order to kick-start the debate, particularly on the key questions of merging the two franchises into one and the potential devolution of responsibility from central government to local level.

Headline findings

The research shows that passengers value the mix of local and longer distance services provided by the two operators. Services are regarded generally as punctual, reliable, and suitable for passenger needs. However, there are a number of issues regarded as particularly important for improvement:
- better quality (age, functionality and cleanliness) of trains on the Northern franchise
- more carriages to reduce overcrowding, especially at peak times, and with improved luggage space
- enhanced airport services.

There were also other concerns, including access, security and staffing at smaller stations, availability of information, the adequacy of timetables for modern lifestyles, and confusion about fare structures and rules, with notable unease about levels of fare evasion.

The significance of staff

A striking feature of the feedback was the significance passengers placed on staffing. There were frequent references to the value of staff presence and the varied assistance staff could provide. Staff were appreciated where available and there were suggestions that they could bring further benefits if deployed at places where they currently are not – in particular passengers felt this could enhance feelings of security, and also prevent fare evasion.

This has implications for franchise planning at a time when industry costs and efficiency are under the spotlight. However, from a passenger perspective, staff clearly play a very important role in the overall service offer.

Branding and devolution

Whilst passengers have some clear views about both of the train companies, ultimately there is no significant brand loyalty and there appears to be little concern about a future change to the operator or branding. Similarly, when it comes to devolution, the most important issue is the effectiveness of the train service rather than structures for specification and regulation.

However, in both instances there is a high level of scepticism about change for change's sake and the potential costs of reorganisation or, in a merged franchise, from any loss of competition. For devolution, passengers also have questions about the perceived competence of local authorities to be an effective controlling body and the potential for fragmentation and differences between local bodies. Conversely, an improved awareness of local issues, increased transparency and accountability, as well as the potential for increasing integration with other services was also recognised. This was notably the case in Manchester where experience of Transport for Greater Manchester was seen to illustrate the potential benefits of local control.

Our findings suggest that comprehensive communication and clearly spelling out the purpose and benefits of any changes to passengers will be of critical importance if new structures are to be implemented.

Using the research findings

The research report which follows draws on the findings of the qualitative research with Northern and TPE passengers and uses NPS data to provide additional insight. It forms a stand-alone document in its own right and we are publishing this at the first opportunity in order to make this information available to other interested parties, who we hope will also be able to make use of the insights that can be drawn from it.

Passenger Focus will make further use of this information as we provide additional input to the Northern and TPE refranchising process.

Passenger Focus

Northern and TransPennine Franchise Research Report

September 2012

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Contents

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1. Management summary

1.1   Background to the research

The current Northern and TransPennine franchises are approaching renewal. Public consultation regarding the new franchise arrangements was initially scheduled to begin in October 2012, with the new contracts expected to run from April 2014. This timescale is now subject to change following the reviews initiated by the Secretary of State for Transport in the wake of concerns about the West Coast franchise competition.

Passenger Focus has undertaken qualitative research to understand the needs and experiences of passengers using the services currently, to help inform its contribution to this refranchising process.

This report describes the findings from this research, and also draws upon other studies undertaken by Passenger Focus which provide relevant information about passenger views on the Northern and TransPennine franchises.

1.2   Summary of the research findings: passenger views on service delivery

Passengers regard the current rail provision in the north of England as adequate but with a great deal of room for improvement. Services provide for general transport needs which are typically frequent, short distance, local leisure and commuting journeys on the Northern franchise and longer, less frequent journeys with a heavy leisure emphasis on First TransPennine Express (FTPE).

There are particular features of the current operations which passengers feel should be protected as a priority under future franchise arrangements, to ensure that services continue to meet their basic needs:

- A mix of local and longer-distance express services.

- Reliability of services, which is felt, on the whole, to be reasonable for both TOCs. The national Public Performance Measure[1] (PPM) Moving Annual Average[2] (MAA) for Period 7 (16 September to 13 October 2012) was at 91.7 per cent, therefore Northern and First TransPennine Express compare favourably (Northern at 91.8 per cent and First TransPennine Express at 93.3 per cent for the same period).

Beyond this, an analysis of the *National Passenger Survey (NPS)* shows the service aspects which drive passenger satisfaction, and dissatisfaction, with rail journeys on these franchises

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[1] PPM measures the performance of individual trains advertised as passenger services against their planned timetable as agreed between the operator and Network Rail at 10pm the night before. PPM is therefore the percentage of trains 'on time' compared to the total number of trains planned. A train is defined as on time if it arrives within five minutes of the planned destination arrival time for London and South East or regional services, or 10 minutes for long distance services.

[2] MAA is an average for the most recent 13 four-week reporting periods. MAA figures smooth out short-term fluctuations and highlight the annual background pattern.

are the environment on board the train (cleanliness in particular), ease of getting on and off the train, sufficient capacity for all to sit, journey speed and information provision.

Passengers also identified the following issues which are in particular need of improvement within the future franchises:

- **The quality of rolling stock on routes currently served by Northern Rail**
  - Trains are felt to be at best uncomfortable but at worst dangerous, and passengers feel that the age and poor appearance of trains is symptomatic of a lack of professionalism and respect for customers.

- **Overcrowding**
  - Passengers are crying out for more space on Northern trains. While frequency could be increased to alleviate crowding, passengers' feedback suggests that increasing the number of carriages would be their preferred solution.

  - Passengers would appreciate more luggage space to improve the environment on FTPE trains, particularly on airport services.

- **Eliminate fare evasion**
  - Fare evasion by some passengers is felt to be a big problem, especially on Northern Rail. This makes fare-paying passengers feel a sense of injustice, and frustration that money is being wasted which might otherwise be invested in improving the service – especially in upgrading rolling stock.

  - Passengers view the cause of this problem to be unstaffed stations, leading to reliance on on-board purchase of tickets, which in turn is often not possible due to overcrowding and too few staff. Some passengers also said not all staff were as proactive in selling or checking tickets as they could be. As a result, passengers feel the main solution to this problem would be an increased staff presence both at stations and on trains.

- **Airport service provision.**
  - Passengers who use FTPE services to/from Manchester Airport (regardless of whether they are using the airport themselves) feel that luggage space needs to be increased, and that it would be beneficial to have luggage storage in the middle of carriages as well as at the ends. This is both to create more space on board for passengers, and for security of luggage.

  - Passengers also comment that airport services do not integrate as effectively as possible with flights, and feel that late-night and overnight services are lacking in particular.

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In addition to these priority areas for improvement, passengers fed back on a number of other aspects of service, which they felt should be taken into consideration for the future franchises:

- **Functionality of smaller stations**
  Passengers highlighted four key aspects of stations which affect them negatively. In the main these were for smaller and more rural stations:
  - Access around stations is not easy where passengers have no choice but to use steps, which are difficult for passengers with disabilities, or with luggage or other items such as pushchairs. While passengers accept that lifts are not always feasible, assistance from staff could make a difference to many in these situations.

  - Information at stations is often felt to be inadequate. In addition to wanting improved signage and announcements, passengers feel that staff have an important role in providing and tailoring information, and reassuring passengers about correct platforms, train times, etc.

  - Many passengers mentioned that they did not feel safe at some stations, or would avoid some stations for this reason. The upkeep of stations can influence security perceptions, and many feel that poorly kept stations are more likely to attract further vandalism or anti-social behaviour; therefore maintenance at stations should be an important part of future operations. Passengers felt that the presence of other people improves their feeling of safety, and discourages crime and anti-social behaviour.

- **Timetables**
  - For some, current timetables are felt to be out of step with modern lifestyles, and do not adequately accommodate passengers who need to travel later at night during the week and at weekends.

- **Fare structures and rules**
  - There is great confusion about when and where different types of tickets can be used. This confusion is magnified on many Northern routes, where passengers are sometimes unable to purchase tickets at stations but are unclear about whether it is legitimate to purchase on board or pay on arrival at destination

  - With this in mind, many passengers complain about uncompromising staff attitudes towards those who have made genuine mistakes about ticket selection or facility to pay on the train.

- **Provision of information on trains.**
  - Passengers using Northern Rail services in particular do not feel that information is provided as effectively as it could be. They would like to see greater frequency of announcements on board, upgrades to the tannoy technology which is sometimes hard to hear, and greater staff presence to help with information.

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It is notable that many of the journey aspects that passengers would like to see improved involve a staff presence. In passengers' view, increased numbers of staff (including just one member of staff at some stations, for part of the day) could make a genuinely positive difference in many ways.

1.3   Summary of the research findings: franchise responsibilities and structures

In addition to understanding passenger experiences and needs on the Northern and First TransPennine Express services, this research explored passenger views about changes to the train companies operating the franchises, and devolution of responsibility for rail.

Ultimately, passengers are concerned about how effectively train services are delivered, rather than who operates them or is responsible for specification and regulation. However, they do express some cynicism about anything that involves changing companies, re-branding or re-structuring, if it appears to be done 'for the sake of it'. Any changes to how the franchises are managed in the future should be made and explained with great care to ensure that passengers perceive there to be genuine benefits.

In relation to devolution specifically, there was a reasonably positive reaction in Manchester. This indicates that passengers are able to see benefits in local transport governance. However, elsewhere there are some important hurdles in terms of public perception which will need to be overcome including:
- concerns about capacity for local authorities and organisations to manage a complex transport network
- fragmentation
- poor track records in localised service delivery
- satisfaction with the current method.

Again, passengers will need to see genuine advantages to making changes.

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2. Background and research objectives

The current Northern and TransPennine franchises are approaching renewal. Public consultation regarding the new franchise arrangements was initially scheduled to begin in October 2012, with the new contracts expected to run from April 2014. This timescale is now subject to change following the reviews initiated by the Secretary of State for Transport in the wake of concerns about the West Coast franchise competition.

Passenger Focus is the statutory watchdog for Britain's rail passengers, England's bus and tram passengers outside London and coach passengers in England on scheduled domestic services. Passenger Focus is funded by the Department for Transport (DfT) but operates independently with a strong emphasis on evidence-based campaigning and research.

Passenger Focus has a recognised role in the refranchise process, providing advice to the Secretary of State and DfT and working closely with potential bidders. Passenger Focus uses its knowledge to influence decisions on behalf of passengers and secure journey improvements.

In advance of the franchise consultation for Northern and TransPennine, Passenger Focus has undertaken market research to understand the needs and experiences of passengers using the services currently.

Qualitative research was undertaken in June 2012, to understand:

- Passengers' experiences of current rail services, as provided by Northern Rail and First TransPennine Express (FTPE)

- Passengers' needs and priorities for the future on these routes

- Passengers' opinions about potential changes to the way services in the north of England are structured, managed and specified, particularly:
    o The implications of changes to the train operating companies, and the implications of merging the two current franchises into one which could be run by a single operator

    o Opinions and expectations of devolving rail service governance from central to more local government.

This report describes the findings from this qualitative research, and also draws upon other studies undertaken by Passenger Focus which provide relevant information about passenger views on the Northern and TransPennine franchises:
- *National Passenger Survey*, Spring 2012
- TransPennine franchise research, 2010
- Research studies into disruption and engineering work, 2010 and 2012.

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3. Research methodology

Passenger Focus has conducted a large number of quantitative surveys into rail passenger needs and experiences on services around the UK, and these will be drawn upon to inform Passenger Focus' input to the consultation on the Northern and TransPennine franchise renewals. For this reason, a qualitative approach was chosen for the June 2012 research in order to explore some of the issues in more detail.

This qualitative research comprised the following:[3]
- 10 focus groups:
  - two each in Manchester, Leeds, Sheffield, Lancaster and Middlesbrough
  - five groups of commuters and five groups of leisure travellers (as the majority of journeys made on these franchises are for leisure or frequent commuting to/from work or education, rather than for more ad hoc business purposes)
  - each group contained a mix of customers of Northern and FTPE, including some with experience of both, and some with a choice between the two
  - there was also a mix of age groups and gender.

- 10 one-to-one depth interviews with business travellers:
  - spread across the same five areas
  - including three passengers who regularly travel for business between these areas and Scotland, and two who travel to/from Manchester Airport.

- Two one-to-one depth interviews with leisure travellers to/from Manchester Airport.

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[3] See Appendix 1 for more detailed descriptions of the sample.

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4. Context: who uses Northern and TransPennine services?

The *National Passenger Survey (NPS)* is a bi-annual study of a large, representative sample of passenger journeys made on each franchised train operating company (TOC) in England, Scotland and Wales. As such it can provide useful information about the types of passengers using Northern and TransPennine services[4].

Typical passenger journeys made using Northern Rail services have the following features:
- individual passengers are **frequent** users (64 per cent travel at least once a month)
- they make relatively **short distance, local journeys** (the average journey time as recorded by passengers themselves is 36 minutes)
- journeys are made principally for **leisure** (53 per cent) and **commuting** (38 per cent)
- six per cent of journeys are made by passengers who consider themselves to have a disability.

For First TransPennine Express:
- passengers travel **less frequently than Northern** (42 per cent travel at least once a month)
- journeys are much **longer** (the average journey time is 76 minutes)
- a higher proportion of journeys are made for **leisure** purposes (62 per cent), but **commuting** is also important (24 per cent)
- **business** travel is more common on FTPE routes (14 per cent)
- a third (34 per cent) of journeys involve **luggage** or heavy baggage
- seven per cent of journeys are made by disabled passengers.

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[4]*NPS* Spring 2012: 1264 Northern Rail passengers and 1175 FTPE passengers.

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5. Research findings: overview and top priorities for future franchise(s)

5.1 Overall satisfaction with current Northern and First TransPennine services

Information from *NPS* shows that passengers are reasonably satisfied overall with the services on both Northern Rail and FTPE. The table below shows the percentage of passengers who are satisfied with their journey for each of the key routes run by these train operating companies (TOCs), and the average for all similar routes run by other TOCs in England, Wales and Scotland.

As the table shows, a high proportion of passengers on FTPE's interurban routes (North West and South) are satisfied with their journey, and this is positive in comparison with interurban routes operated by other TOCs, particularly for the South route. For Northern routes, and for FTPE's North route, passenger satisfaction is reasonable in comparison to similar routes run by other TOCs.

Table 1: Overall satisfaction with journey; NPS, Spring 2012.

TOC	Route	% very/fairly satisfied with journey: TOC route	% very/fairly satisfied with journey: benchmark[5]
FTPE	North West	84	86 (Interurban routes)
	South	92	
	North	89	86 (Long distance routes)
Northern Rail	Lancashire & Cumbria	86	85 (Rural routes)
	West & North Yorkshire	84	
	Manchester & Liverpool	82	83 (Short commute routes)
	Tyne Tees & Wear	88	
	South & East Yorkshire	87	86 (Interurban routes)

Qualitative discussions with passengers also indicated that satisfaction with the services they use is reasonable. Spontaneously, most participants expressed that they were fairly content with rail services in their area, making comments such as:

- "It meets my needs." *Manchester, business traveller*
- "They're perfectly fine." *Manchester Airport, leisure traveller.*

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[5] Please see Appendix 2 for definition of benchmarks.

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5.2   Future franchise operations: passenger priorities

With passengers expressing reasonable satisfaction with current services, there is a good base for new franchisees to work from – although of course there is always room for improvement. In doing so, future franchisee(s) will need to be aware of the key factors which help to provide positive journey experiences.

Analysis of quantitative survey data from *NPS* shows which aspects of rail services are most closely associated with overall journey satisfaction, and this is represented in Figure 1 below. In this graph, the coloured bars indicate the relative importance of each factor to passengers; the most important factors are shown individually.

Figure 1: Factors most closely associated with overall journey satisfaction
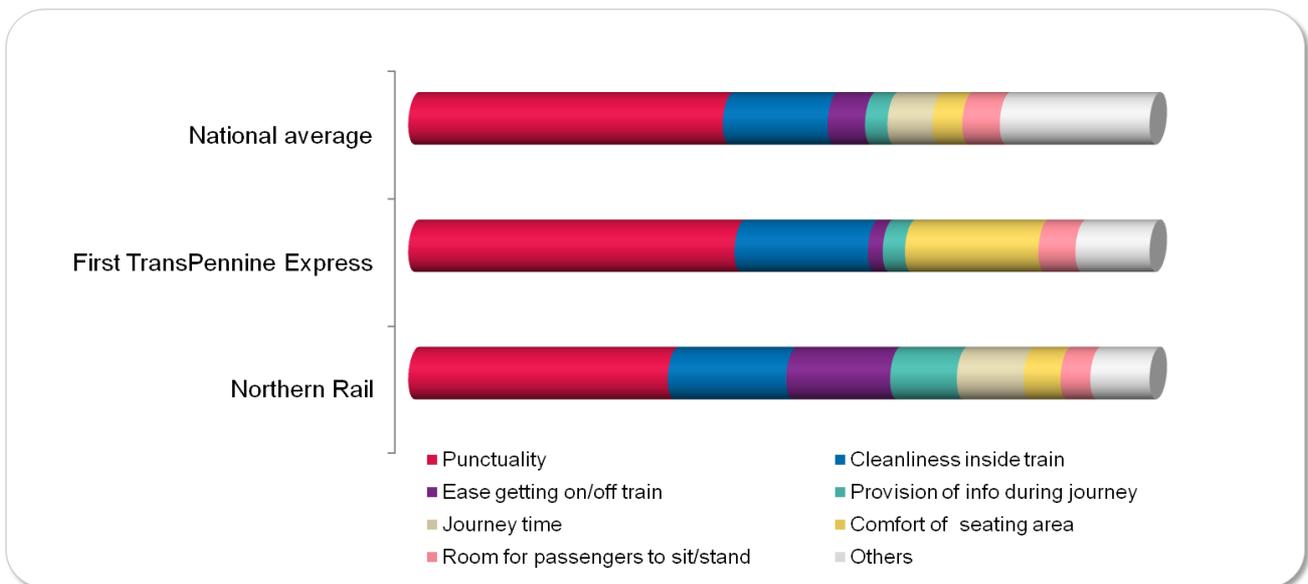
NPS Autumn 2011/Spring 2012

Reliability/punctuality is consistently identified as a critical factor in delivering a satisfactory service in all research that Passenger Focus has undertaken, in all geographic areas and for all types of rail service. As shown above, this is also the case for passengers using both Northern and TransPennine, and should continue to be a key focus for any new operators of these franchises. Other key factors are those related to the environment on board trains, sufficient capacity for all passengers, and information provision.

Qualitative discussions also confirmed various reasons why the current services are felt to be satisfactory. The following were aspects of current service which passengers spontaneously mentioned as positive points:

- The mix of different types of service is appropriate to meet the needs of travellers in and around the north of England:
  - Northern Rail provides good coverage of many smaller towns and villages, a fact which is appreciated by users who might otherwise have fewer transport options

- o This is complemented by the fast, direct links between larger towns and cities, as provided by FTPE

- o "The local trains are Northern...TransPennine is an express–it's a different animal." *Manchester, leisure traveller on FTPE.*

- Both TOCs are felt to be reasonably reliable:
  - o "The reliability aspect of it I can't really fault." *Manchester, business traveller on Northern*

  - o "It gets me there on time, and for me that's the main thing." *Manchester, business traveller on FTPE.*

- On the whole, passengers are positive about their interaction with staff: the majority of staff members are felt to be friendly and helpful when approached by passengers. However, passengers are less satisfied with the <u>availability</u> and <u>visibility</u> of staff, especially on Northern routes; this is covered in more detail later in this report.

These are the service aspects which should be maintained in particular, and built upon in the future.

Of course there are also key things which passengers want to see improved in the future, in order to take services from 'acceptable' to 'good'. Again spontaneously, the following points arose as areas in need of improvement.

For Northern:
- the quality (age and functionality as well as cleanliness) of rolling stock
- too few carriages leading to overcrowding, especially – but not exclusively – during peak hours
- facilities, upkeep and staff presence at smaller rural stations
- high and visible incidence of fare evasion.

The points above can lead to a sense of poor value for money in comparison to other rail services.

For First TransPennine Express:
- insufficient and inadequately positioned luggage space, particularly on services heading to or from Manchester Airport:
  - o note that this impacts on all passengers, not just those with luggage themselves.
- overcrowding, made worse when many passengers have luggage with them
- some feel that the airport services are not adequately designed to serve this function:
  - o in terms of luggage space
  - o also in terms of timetables, where many passengers mentioned that rail services do not integrate well enough with flights, including a lack of trains in the late evening or very early morning.

The following section of this report looks at passengers' views on each of these priority service aspects in more detail, as well as their views on some additional aspects of service which were

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covered in the qualitative discussions, but did not arise spontaneously from passengers themselves.

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6. Research findings: passenger views on specific service aspects

6.1   Punctuality and reliability of rail services

Punctuality and reliability are the most important aspects of rail services to passengers. On Northern Rail and FTPE services, the proportion of journeys on which passengers perceive there to be a delay is in line with the national average, as shown in figure 2.

Figure 2: journeys in which a delay is perceived, NPS Spring 2012
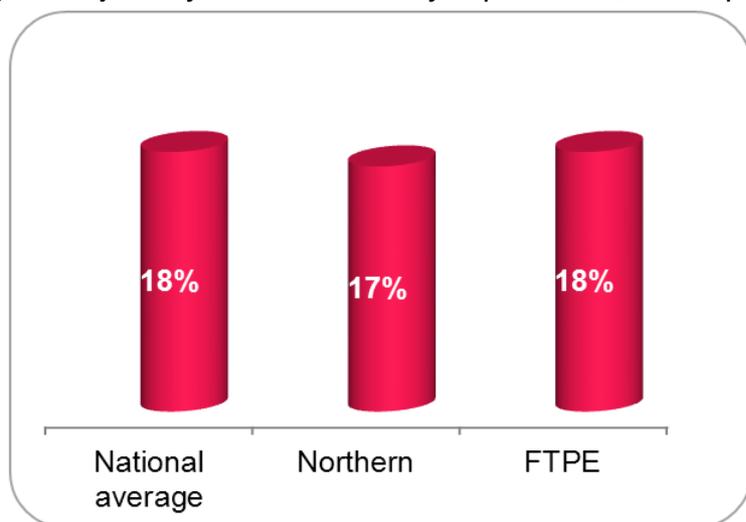
The majority of these delays are described by passengers as 'minor' and, in line with this, passengers in the qualitative discussions were also fairly favourable about the reliability of Northern and FTPE services.

- "Rarely cancelled, rarely late." *Manchester, commuter, Northern*

- *"*Really reliable, and to me that is important…if I want it to come in at 5:12, it comes in at 5:12." *Manchester Airport, business, FTPE*

- "Trains have generally always been on time and have been reliable…and for me, that's the main thing…the reliability aspect is what I need…I need to know I'm going to get there." *Manchester, business, FTPE*

- "If you miss one, you're not waiting a long time for the next one." *Leeds, commuter, Northern.*

Similarly, *NPS* data indicate that, for the majority of journeys, Northern and FTPE passengers are reasonably satisfied with the punctuality of trains – although there are some routes in particular where this would benefit from improvement.

Table 2 shows the percentage of passengers on Northern/FTPE journeys who are satisfied with punctuality, in comparison to those on similar routes run by other TOCs. In particular, satisfaction with punctuality is lower on Northern Rail's short commuter routes; passengers on

other TOCs' similar routes have a better perception of punctuality, so improvement is possible, and we know that even small delays tend to have a bigger impact on commuters than passengers travelling for other reasons, meaning that punctuality is <u>particularly</u> important for commuters[6].

Table 2: Satisfaction with punctuality; NPS, Spring 2012

TOC	Route	% very/fairly satisfied with punctuality: TOC route	% very/fairly satisfied with punctuality: benchmark
FTPE	North West	84	84
	South	89	*(Interurban routes)*
	North	90	87 *(Long distance routes)*
Northern Rail	Lancashire & Cumbria	81	82
	West & North Yorkshire	78	*(Rural routes)*
	Manchester & Liverpool	75	81
	Tyne Tees & Wear	78	*(Short commute routes)*
	South & East Yorkshire	86	84 *(Interurban routes)*

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[6] *Examining the Relationship between customer satisfaction and performance - supplementary report*: http://www.passengerfocus.org.uk/research/publications/examining-the-relationship-between-customer-satisfaction-and-performance-supplementary-report.

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6.2 Adequacy of timetables

Timetabling did not come up spontaneously in the group discussions about Northern and FTPE, other than specifically in relation to airport services. However this is an aspect of the services which may be considered by future franchisees. From a passenger viewpoint, issues related to timetabling were broadly either to do with frequency of services, or the times of day and days of the week that are covered.

6.2.1 Frequency of services

The table below shows the level of satisfaction with frequency on Northern and FTPE routes, as found by the *National Passenger Survey*.

Table 3: Satisfaction with frequency; NPS, Spring 2012

TOC	Route	per cent very/fairly satisfied with frequency: TOC route	per cent very/fairly satisfied with frequency: benchmark
FTPE	North West	80	81
	South	89	*(Interurban routes)*
	North	89	84 *(Long distance routes)*
Northern Rail	Lancashire & Cumbria	65	74
	West & North Yorkshire	74	*(Rural routes)*
	Manchester & Liverpool	63	77
	Tyne Tees & Wear	71	*(Short commute routes)*
	South & East Yorkshire	81	81 *(Interurban routes)*

Frequency of FTPE services is viewed quite positively by the travellers that use these routes; as we have seen these journeys are mainly for leisure, and ad-hoc business travel is fairly common.

For Northern Rail, frequency is seen less positively; this is particularly the case for rural and short commuter routes.

Participants in the qualitative discussions also recognised that rural locations tend to be served less frequently than some other areas, although it should be noted that they did accept this to some degree due to lower population density in rural areas. As mentioned earlier in this report, there is also a sense of appreciation that small rural towns have a rail service at all. Therefore while there could be scope to improve frequency on rural routes, this would be an acceptable lower priority to passengers than other potential improvements within the new franchise(s).

Qualitative discussions revealed that, for short commuter journeys on Northern, overcrowding is a very common and frustrating issue. While increased frequency on these routes will ease this problem for passengers, the next franchisee should also (and perhaps in the first instance) consider adding more carriages to trains running within the existing timetable. This is certainly

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the solution which passengers feel is logical, rather than necessarily increasing frequency. Overcrowding on trains is covered further in section 6.3.

6.2.2   Coverage of times and days

Quantitative research published in 2010 looked at timetabling on TransPennine routes[7], and findings relevant to this are shown in table 4 below.

It is notable that a significant proportion of passengers have no opinion about whether trains should run earlier or later than they do currently. This tallies with the fact that, in qualitative discussions, the topic of timetabling was nearly always introduced by the moderator, rather than being a service aspect which passengers themselves spontaneously mentioned as either a clear priority for improvement, or a real benefit to the current operation. The exception to this was airport services, for which some research participants did spontaneously mention that more later-evening/night services would be appreciated.

However, while not a high priority for passengers, table 4 shows that there is a small appetite for earlier-running trains on weekdays and a sizeable proportion of commuters – the most regular users – would like to see later-running trains Monday to Friday. Weekend travellers would also be interested in later-running trains on Saturdays and Sundays.

Table 4: Passenger opinion on timings of TransPennine services; TransPennine Express franchise research, 2010

Whether first train of the day should be…	Weekday	Saturday	Sunday
Earlier	15 per cent *(20 per cent among commuters)*	10 per cent	14 per cent
About right already	30 per cent	19 per cent	13 per cent
No opinion	55 per cent	71 per cent	73 per cent

Whether last train of the day should be…	Weekday	Saturday	Sunday
Later	27 per cent *(36 per cent among commuters)*	26 per cent	22 per cent
About right already	19 per cent	11 per cent	11 per cent
No opinion	54 per cent	63 per cent	66 per cent

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[7] http://www.passengerfocus.org.uk/research/publications/transpennine-express-results-tables

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The findings shown here are specifically related to FTPE services, but were corroborated in the qualitative discussions for both TOCs. In the discussions, many described timetables as a little old fashioned, and not in tune with modern lifestyles; passengers felt that train services were based around an assumption of 9am–5pm working days, with little need for travel at weekends or later in the evenings:

- "Train companies haven't caught up with the real world. Sunday is like any other day. People work, people go shopping. The trains are used just as much on this day but the service is much poorer." *Lancaster, leisure*

- "I recently went for a day with friends to York on a Saturday, and it was horrible coming back because the last train was half past 8…and it was crammed." *Middlesbrough, leisure*

- "I think people have adjusted to supermarkets opening 24 hours a day, so people expect services to be there…you'd think you'd be able to get some sort of transport late at night rather than a taxi." *Leeds, commuter.*

These comments confirm that passengers would particularly like to see later-running trains at weekends and later/night-time trains during the week. Overnight trains were also seen to be necessary for services running to and from Manchester Airport, and many passengers (even those not needing to travel to the airport themselves) mentioned that the timetables for these services did not seem to be well integrated with flights currently:

- "It's an airport service, and I think in that respect it's incredibly poor…I think the last train back from Manchester is something like 10:20 in the evening, which to me is quite early…I've only ever used it once to get to the airport, and that's because it's never running at the right times." *Lancaster, business.*

As an aside, one of the groups suggested that trains running overnight could reasonably attract higher fares, in order that providing such a service did not force ticket prices up for day-time passengers. Higher fares during the night could be seen as acceptable, since there is already a precedent for this type of approach in taxi fares, for which people are used to paying higher prices after 11pm.

This suggestion was seen as a good idea by members of this group, but we would strongly advocate further testing among a larger group of passengers before developing any proposals for taking the idea forward. It should be noted that the suggestion for fare premiums at night was not made in relation to airport services, and given the sense from passengers that night-time services should be provided to/from the airport, it is unlikely that higher fares would be acceptable in this case.

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6.3 Levels of crowding on trains

Overcrowding is felt to be a problem on both Northern and FTPE trains, and something which new franchisees should aim to improve in order to enhance passenger experiences.

This is particularly the case for peak (commuting) time journeys, but not exclusively so. As demonstrated in the tables below, passenger satisfaction with the amount of room to sit or stand is low for Northern's short commuter routes in particular, and for all FTPE routes. In fact this is the area where FTPE compares most poorly to all other long distance TOCs[8].

Table 5: S*atisfaction with room to sit or stand; NPS, Spring 2012*
Peak services only

TOC	Route	% very/fairly satisfied with room to sit/stand: TOC route	% very/fairly satisfied with room to sit/stand: benchmark
FTPE	North West	66	69
	South	58	*(Interurban routes)*
	North	55	62
			(Long distance routes)
Northern Rail	Lancashire & Cumbria	69	62
	West & North Yorkshire	57	*(Rural routes)*
	Manchester & Liverpool	49	58
	Tyne Tees & Wear	57	*(Short commute routes)*
	South & East Yorkshire	69	69
			(Interurban routes)

Off Peak services only

TOC	Route	% very/fairly satisfied with room to sit/stand: TOC route	% very/fairly satisfied with room to sit/stand: benchmark
FTPE	North West	53	76
	South	73	*(Interurban routes)*
	North	71	75
			(Long distance routes)
Northern Rail	Lancashire & Cumbria	77	78
	West & North Yorkshire	84	*(Rural routes)*
	Manchester & Liverpool	71	78
	Tyne Tees & Wear	74	*(Short commute routes)*
	South & East Yorkshire	83	76
			(Interurban routes)

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[8] For the purposes of the *National Passenger Survey*, long-distance TOCs are CrossCountry, East Coast, East Midlands, First TransPennine Express and Virgin Trains.

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In the qualitative discussions, passengers described some key reasons why overcrowding is a problem:

- It's uncomfortable, and people object in principle to standing when they have paid for a ticket:
  - "It's horrible. There's not enough space, especially when people are trying to push to get out the doors." *Manchester Airport, leisure*

  - "You shouldn't have passengers standing on a train…why should you pay the same amount to stand?" *Manchester Airport, leisure.*

- The perception of safety can be compromised:
  - "Don't wait for something to happen… like a fire on the train and people can't get off." *Manchester, leisure*

  - "People start arguing…and people faint…it's just too hot." *Manchester, commuter.*

- It can be difficult to work, which means that time spent on the train is unproductive. This can be very frustrating for business travellers in particular, who often specifically choose to travel by train rather than car in order to work while travelling:
  - "It's 'down-time', you can't get your laptop out if you haven't got a lap." *Manchester/Leeds-Glasgow, business.*

As mentioned in section 6.2.1, there is a consensus from passengers that an obvious solution to overcrowding would be to increase the number of carriages, rather than increase the frequency of services. This is particularly the case for Northern trains which are often felt to be too short, and this seems illogical to users:

- "I just don't get it. The same train has been overcrowded for so long and yet the train companies do nothing about it. It's not suddenly going to stop being packed so why don't they do something?" *Sheffield, commuter*

- "They just don't seem to grasp that a lot of commuters use their trains. They always seem surprised that it's busy but it's been like that forever." *Lancaster, commuter.*

6.3.1   Luggage storage on board

The other issue mentioned by passengers, in relation to the management of space on board, was luggage storage. Passengers would like to see luggage storage improved on services heading to/from Manchester Airport in particular.

The research carried out on TransPennine services in 2010 highlighted that, of a range of service aspects covered in the survey, luggage space was the least satisfactory on airport trains. This is shown in Table 6, where data is based on people who had travelled to Manchester Airport by train within the previous 12 months, and the question was asked specifically about services to and from the airport.

Table 6: Satisfaction with aspects of Manchester Airport train services; TransPennine Express franchise research, 2010

Service aspect	% very/fairly satisfied
Frequency to Airport	79
Speed of journey	78
Availability of seats	69
Ease of changing at Manchester Piccadilly	54
Connections with other train services at Manchester Piccadilly	53
Amount of space for luggage	49

- "It's not great getting them [FTPE] to Manchester Airport during busy times as there is no space for luggage." *Sheffield, leisure.*

As well as the amount of luggage space, discussions with passengers also highlighted that luggage storage space could also be improved in terms of location. This was for two reasons:
- proximity to location of occupied seat allowing easier access to luggage for more passengers
- and, more importantly, security.

Many passengers expressed anxiety when travelling with luggage that they had stored at the end of the carriage near to the door: they worry that it is not visible from their seat, and this combined with being close to the doors means that another passenger could easily take it, either intentionally or accidentally.

Some people mentioned the layout on some Virgin Trains, where luggage storage is placed in the centre of the carriage as well as at the ends. This can be preferable because luggage is visible, more accessible and further from the doors; some also felt that this greater accessibility could help reduce congestion in the aisles when lots of people want to disembark and others are pulling out their luggage at the same time.

6.4   Quality of rolling stock on the Northern franchise

As highlighted earlier in this report, the environment on board trains is an influential factor in passengers' overall experience of rail travel, and general upkeep is one area that was universally felt to be in need of improvement, in the qualitative discussions.

NPS data in Table 7 shows that passenger satisfaction with the upkeep and repair of Northern Rail trains is very low on all routes. In fact, Northern Rail's overall rating for satisfaction with upkeep and repair is 54 per cent, the lowest score of all franchised TOCs for spring 2012. Similar patterns are seen for related measures like cleanliness of the inside and outside of trains. By contrast FTPE is much better, with scores in the high 80s and 90s.

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Table 7: Satisfaction with upkeep and repair of trains; NPS, Spring 2012

TOC	Route	% very/fairly satisfied with train upkeep/repair: TOC route	% very/fairly satisfied with train upkeep/repair: benchmark
Northern Rail	Lancashire & Cumbria	57	64 *(Rural routes)*
	West & North Yorkshire	59	
	Manchester & Liverpool	48	73 *(Short commute routes)*
	Tyne Tees & Wear	43	
	South & East Yorkshire	60	78 *(Interurban routes)*

These low levels of satisfaction are caused almost entirely by the age of the rolling stock:

- "A bit dingy, pretty well worn, an old feel to it – maybe that's their intention, maybe it adds to the atmosphere…but I doubt it…I'm not convinced myself… How about some new trains mate?!" *Scotland to Leeds, business*

- "Like an old steam train." *Sheffield, leisure*

- "We only get London's rejects." *Leeds, leisure*

- "They're like the coaches you had when you went to the swimming baths at school, the coaches in the sixties." *Middlesbrough, commuter*

- "Some of the rolling stock is almost decrepit…it's 1950s-1960s rolling stock." *Manchester, commuter*

- "It's higher than a bus fare, but it's just like a bus, a bus on rails." *Leeds, leisure.*

This is not a 'superficial' problem; it can have a genuine negative affect on passengers' journeys, in a number of ways:

- At the most basic level, the journey is simply uncomfortable:
  - "If you're travelling for an hour and a half on the train, you want to be comfortable. You wouldn't travel for an hour and a half on a Northern train…not by choice anyway." *Manchester, leisure*

  - "During the summer months it's like a sauna – it's a good weight loss programme!" *Leeds, commuter.*

- On occasions passengers can feel unsafe:
  - "The seats are a bit shabby…the one I was on the other week was quite loose and I almost slipped off it." *Manchester, leisure*

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- o "One of the seats was a health and safety problem, you couldn't sit on it, it was skew-wiff." *Leeds, leisure.*

- Many passengers feel that poor quality rolling stock is a symptom of a lack of pride, professionalism and credibility in the business, and therefore a real lack of respect for its customers. This in turn helps to create a feeling of poor value for money, because passengers do not perceive that fares are any cheaper for Northern services, in comparison to FTPE in particular. These are real issues which the next franchisee should seek to resolve:
  - o "It's like having to wear dirty socks, because all your clean ones are in the wash but you'd rather wear a pair than none at all." *Lancaster, leisure.*

6.5   Fare evasion

The subject of fare evasion arose in all of the discussion groups, and particularly in Sheffield, Lancaster and Middlesbrough. This was usually in relation to Northern Rail, but the prevalence of the problem on Northern Rail trains meant that passengers were also more aware of incidences of fare evasion on FTPE services.

Passengers reported that fare evasion has become common on Northern services, mainly because:

- Many stations are unstaffed, meaning it is easy to avoid buying a ticket, and sometimes simply not feasible if ticket machines are also not provided or not working.

- It is therefore common to need to purchase a ticket on-board. However this is often not possible due to a lack of staff on board, overcrowding which prevents ticket inspectors and conductors selling tickets moving through the train, and/or the frequent stopping nature of Northern services which sometimes means that the turnover of passengers during the journey is too great for the inspector and conductor to reach all passengers.

- Some also feel that there is general disregard within Northern for revenue protection. Many passengers fail to buy a ticket simply because they have not been given the opportunity to do so. However, because fare evasion has become so common, some passengers have learnt how to 'play the system': some will disembark the train at a stop when the ticket inspector/conductor is seen to be moving down the train, and wait at that station for the next train. Most participants in the research had witnessed this, and some even admitted doing it themselves which in itself is a sign of how 'normal' and accepted fare evasion has become:
  - o "They don't bother checking tickets most of the time so there is no incentive to buy one. Everyone knows it." *Lancaster, leisure.*

While fare evasion was sometimes discussed as a local joke, it is also incredibly frustrating for the majority of customers. There are three main frustrations:

- There is a strong sense of injustice amongst those who have paid for a ticket when some passengers are known to be travelling for free:

- o "It infuriates me…a lot of people, you know they haven't paid…and they don't intend to pay…they're just getting a free journey." *Manchester, business.*

- Poor revenue protection compounds any other negative perceptions of Northern Rail; honest passengers feel that others' fare evasion prevents badly needed investment into rolling stock, and many assume that those who do buy a ticket are paying a supplement to cover the losses made via fare evasion. Some passengers go further, and feel that the lack of care for revenue protection is another symptom that Northern Rail is not a serious, credible business, and that it cares little for itself or its customers:
  - o "They should damn well check tickets, get people to pay and invest this back into the trains because they really need it." *Lancaster, commuter.*

- It is often acceptable (and necessary) to buy a ticket on the train rather than before boarding, but sometimes not. As a result there is a great deal of confusion amongst both passengers and, they suspect, staff. Many participants reported that they had attempted to buy a ticket on board but were told that this was against the rules and were either fined or treated very rudely ("like a criminal"):
  - o "I wish they would make up their minds about whether you are allowed to buy a ticket on the train or not so you don't get the rude lecture." *Lancaster, commuter.*

It was felt that more ticket barriers at certain stations would help to alleviate the problem. In particular, participants in Sheffield expressed their frustration that ticket gates had been removed from Sheffield station due to a local public access bylaw.

However, passengers strongly felt that the main solution to fare evasion would be to make better provision for the purchase of tickets at stations and on board, and better checking procedures and enforcement. For this, more staff would be required. Although passengers recognised that this would involve a cost, it was felt that this would be more than covered by ensuring that revenue was not lost to fare evasion.

They also felt that increasing the number of staff available on the Northern network would bring other benefits, including the opportunity to ask for help and information, security and helping to control anti social-behaviour; these are all covered in this report in the following sections.

6.6   Functionality of stations

In the qualitative discussions, on the whole stations were felt to be 'functional' and were not discussed to the same extent as experiences on board trains, indicating that the onboard experience and the journey itself are of higher consequence than stations to passengers.

However, passengers described a few key improvements that they would like to see at stations across the Northern and TransPennine networks, principally at the smaller local stations rather than those in the larger towns and cities. These centred on access, security and information provision.

While many saw the logic in some rural stations being unstaffed, this was felt to add to problems with access, security and information when they occur, and the presence of just one staff member could help to alleviate or prevent these issues.

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6.6.1 Moving around stations

In group discussions, only a small number said they had difficulty with access around stations, but this was felt to be a big problem for this minority. The most common issue raised was the need to walk up steps to reach different parts of the station or different platforms. While there is an acknowledgement that it is not necessarily feasible to install alternatives such as lifts, steps are often felt to be too steep, slippery if wet, and very difficult to negotiate if elderly, disabled or travelling with any kind of luggage or pushchairs. For these groups, difficulty in moving around the station can make rail travel extremely difficult, and sometimes impossible:

- *"They're not disabled friendly." - Manchester, leisure.*

Because it is recognised that it is not feasible to install lifts in most stations, passengers felt that having a member of staff available at stations to assist would make a real difference.

6.6.2 Security at stations

Information from NPS shows that the sense of security at stations varies widely on routes in the north of England, reflecting the wide variety of types, sizes and locations of stations.

Table 8 shows that passenger satisfaction with security at stations served by FTPE is reasonably good. Northern Rail routes tend to score similarly to equivalent routes run by other TOCs, but it is worth recognising that satisfaction with security on rural and short commuter routes in general is quite low (these types of routes often include smaller stations with fewer facilities and fewer staff), and so this could be an area for improvement.

Table 8: Satisfaction with personal security at stations; NPS, Spring 2012

TOC	Route	% very/fairly satisfied with security at stations: TOC route	% very/fairly satisfied with security at stations: benchmark
FTPE	North West	83	*73*
	South	79	*(Interurban routes)*
	North	75	73 *(Long distance routes)*
Northern Rail	Lancashire & Cumbria	76	68
	West & North Yorkshire	65	*(Rural routes)*
	Manchester & Liverpool	66	66
	Tyne Tees & Wear	60	*(Short commute routes)*
	South & East Yorkshire	68	73 *(Interurban routes)*

These scores reflect the discussions in the qualitative research, where some passengers expressed concern about security at stations, and these were more often on Northern routes rather than TransPennine routes:

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- "I get to Thornaby station and it's a bit…desolate….you do feel a bit vulnerable, especially if you're on your own. Somebody was attacked there." *Middlesbrough, commuter*

The reason for feeling unsafe or nervous at these stations was usually due to a lack of other passengers or staff, but participants also talked about the general upkeep of stations which contributes to the feeling of safety.

If a station is poorly cared for and there is litter around, this confirms the feeling that there are no people around to manage it and therefore to keep it safe. If the station is clean and has flower beds, this is seen to be evidence of human activity which is both reassuring to passengers themselves, and is also felt to actually discourage antisocial or criminal behaviour by others. Passengers also believe that keeping stations looking clean and cared for is very easy, and so they feel there is little 'excuse' for not improving this in future franchises.

6.6.3 Provision of information at stations

Quantitative data from *NPS* indicates that the majority of Northern and FTPE users are reasonably (and in some cases very) satisfied with information that is provided at stations, as shown here:

Table 9: Satisfaction with provision of information at stations; NPS, Spring 2012

TOC	Route	% very/fairly satisfied with information at stations: TOC route	% very/fairly satisfied with information at stations: benchmark
FTPE	North West	82	*83*
	South	87	*(Interurban routes)*
	North	92	86 *(Long distance routes)*
Northern Rail	Lancashire & Cumbria	81	82
	West & North Yorkshire	82	*(Rural routes)*
	Manchester & Liverpool	78	81
	Tyne Tees & Wear	79	*(Short commute routes)*
	South & East Yorkshire	88	83 *(Interurban routes)*

Qualitative discussions highlighted ways that information provision could be improved further. This was usually in relation to clarity about which platform a train will leave from, especially when platforms change with short notice, and how exactly to reach that platform. Passengers almost always talked about a need for staff to be present to help with platform information, in addition to any information boards or announcements:

- "It could say for example, platform 6, but it doesn't make it clear which end of platform 6, so there could be a 6a, and I've tried numerous times to get on a train to Lincoln [by mistake]…it would be good if there were more staff around to say actually I am on the right platform, because it does get quite confusing." *Leeds, business.*

The second key area of importance to passengers was information at times of disruption, as distinct from the more usual provision of information about train times and platforms. This research has echoed the findings from other studies, that when disruption takes place, whether planned or unplanned, passengers need TOCs to be proactive and quick in giving information, and again the presence of staff is important in enabling passengers to ask specific questions and gain reassurance about what is happening and what they need to do.

- "If they tell you ASAP you can do something about it. You have more options and you feel more in control." *Sheffield, commuter*

- "There's no staff is there? If there's a problem – there's nobody." *Manchester, leisure.*

The next two sections cover staffing and information provision more generally.

6.7   Staff on the Northern and TransPennine networks

As outlined in the sections above, staff can make an important contribution to passengers' journey experiences, but many passengers feel that there are too few staff members available at present, and this is particularly the case for Northern services. This is reflected in information from the *National Passenger Survey*, shown in the table below, where the lowest scores are given for measures relating to staff availability, for both TOCs but especially for Northern.

Several relevant questions are asked in *NPS*, therefore information about satisfaction with staff is summarised here at TOC rather than individual route level. The figure in the right-hand column below indicates how the TOC indexes against other TOCs of the same type.

Table 10: Satisfaction with staff; NPS, Spring 2012

TOC	Staffing measure	% very/fairly satisfied with staffing measure	Index versus TOC type *Northern indexed against other 'regional' TOCs* *FTPE indexed against other 'long distance' TOCs*
Northern	Availability at stations	61	93
	Attitude at stations	71	94
	Availability on trains	60	94
	Attitude on trains	71	95
FTPE	Availability at stations	69	104
	Attitude at stations	78	101
	Availability on trains	67	98
	Attitude on trains	82	102

Please note the column on the far left is an index; so 100 would be a score equal to the sector average, 90 would be lower than the average, and 110 higher.

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Clearly passengers would appreciate greater staff visibility, and qualitative discussions revealed that the most important reasons for needing staff are:

- information – especially, but not exclusively, during disruption, as described above in section 6.6.3
- security, both on trains and at stations
- enforcement of rail 'rules', including making sure that passengers keep their feet off seats and respect 'quiet coaches', and preventing fare evasion.

Passengers acknowledge that there are sometimes situations which mean that staff cannot always ensure security or enforce rules. However, many feel that the presence of staff members can discourage the majority of incidences of antisocial behaviour such as putting feet on seats, and will prevent the majority of cases of fare evasion.

Both quantitative and qualitative evidence suggests that, when they are available, the attitude and helpfulness of staff is more satisfactory than availability, for both Northern and FTPE. However, participants in the group discussions identified some key areas where improvements should be made:

- Passengers gave examples of situations where staff had been unable to answer questions or help fully, due to a lack of knowledge:
  - o This was seen by passengers to indicate either a lack of training, or a lack of communication within the company – especially in the case of disruption, where some people expressed frustration that sometimes staff do not have information which passengers expect them to have

  - o There was also some concern that TOCs do not communicate with each other effectively, meaning that where more than one TOC serves a station, staff working for the different companies have inconsistent information. These are frustrations which have been seen in other areas of the country, and are not exclusive to the Northern and TransPennine franchise areas, but communication within and between TOCs is something that passengers see as both necessary and 'obvious'.

- While many passengers feel that staff attitude is on the whole positive, a consistent complaint was made in the qualitative discussions about the treatment of passengers in relation to ticket purchase. Other research shows that it is common for passengers throughout the UK to find tickets and fare structures confusing[9], and that they feel unfairly penalised for making innocent mistakes such as boarding trains for which they do not have a valid ticket[10]. This qualitative research has confirmed that this is also the case for passengers using both Northern Rail and FTPE.

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[9] *Passenger requirements of rail fares - qualitative research summary:* http://www.passengerfocus.org.uk/research/publications/passenger-requirements-of-rail-fares-qualitative-research-summary

[10] *Ticket to ride?* http://www.passengerfocus.org.uk/research/publications/ticket-to-ride-full-report-may-2012

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- In addition, this problem is magnified on Northern services by confusion about when passengers are permitted to purchase tickets on board, and when not. When passengers are found to have misunderstood ticketing conditions or rules, they complain that staff usually assume that the mistake is deliberate and that passengers have intentionally tried to pay a cheaper or no fare. Passengers would like to see clearer rules, but also a greater sense of understanding and sensitivity from staff.

6.8   Provision of information on the Northern and TransPennine networks

Passengers feel that the provision of information during normal service is reasonable at present for FTPE services. It is also reasonable at most stations served by Northern – although, as highlighted earlier, for some passengers the lack of staff at some Northern stations means that information provision is sometimes less satisfactory. However, passengers generally feel that information on board Northern services is much poorer. These findings are taken from *NPS*; passenger satisfaction with information at stations is shown in Table 9, and satisfaction with information on board trains is shown in the table below.

Table 11: Satisfaction with provision of information on trains; NPS, Spring 2012

TOC	Route	% very/fairly satisfied with information on trains: TOC route	% very/fairly satisfied with information on trains: benchmark
FTPE	North West	80	76
	South	83	*(Interurban routes)*
	North	80	77 *(Long distance routes)*
Northern Rail	Lancashire & Cumbria	58	63
	West & North Yorkshire	64	*(Rural routes)*
	Manchester & Liverpool	44	70
	Tyne Tees & Wear	57	*(Short commute routes)*
	South & East Yorkshire	67	76 *(Interurban routes)*

.
The qualitative discussions revealed that the specific issues with onboard information for Northern Rail are:

- Inconsistency in whether announcements are made about the next station, or any problems on the line. Passengers mentioned that announcements were usually made by the driver or a member of staff on board, and so the number and quality of announcements are variable depending on the person making them

- When announcements are made, tannoy equipment is unclear or not consistently working. Passengers see this as linked to the fact that Northern Rail rolling stock is generally old

- These issues are compounded by the fact that staff are not sufficiently available on board to clarify the information and answer questions.

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By contrast, FTPE was felt to be better at providing information on board. This was partly due to more consistent announcements which are pre-recorded where appropriate, making them clearer to hear, supplementary information on electronic sign boards in the carriages, and a better (if not as great as many would like) staff presence for confirmation of information and reassurance. Ideally, future operators should take on these principles for a more effective way of providing information on board trains.

6.9   Additional needs and concerns of passengers with disabilities

The research in June 2012 did not specifically set out to explore any particular needs of passengers with different disabilities. However, this section summarises the key concerns and needs of disabled passengers that have been identified in *NPS* and other recent studies.

NPS data show that six per cent of Northern Rail passengers and seven per cent of FTPE passengers consider themselves to have a disability, so this is a small but important group. The majority of these have difficulty with mobility, although passengers have a wide variety of different disabilities.

Of course, in general, passengers with disabilities have the same overall priorities and needs as others; however there are some areas in which some disabled passengers have different experiences and additional needs:

- In *NPS*, disabled users of Northern and FTPE are less satisfied overall with the stations where they board than other passengers:
    - Other research, and feedback from passengers participating in the June 2012 Northern/TransPennine study, shows that the key issue is access to, from, and around stations. Steps can of course pose a problem, but station managers should also consider the location of ramps and lifts, and the ease of finding these facilities.

    - This report has also highlighted the importance of staff in helping people with disabilities.

- For similar reasons, getting on, off, and around trains can be challenging:
    - People with disabilities may need assistance from staff, and more time to reach the doors from their seat and to board or disembark

    - When on board, hand holds at the doors and also along the aisles are important, as is adequate provision (and respect from other passengers) of 'priority' seats.

- Many disabled passengers will inevitably have a greater reliance on staff in some circumstances. For both Northern and FTPE, satisfaction with staff presence is low amongst disabled passengers, as it is for all.
    - Note that although some disabled passengers will book assistance in advance, this is not always possible since people with disabilities may need to be flexible

in the times that they travel (for example to accommodate overrunning business meetings) in the same way that people without disabilities expect to do.

6.10 Value for money and fare prices

This report highlights several areas in which Northern Rail customers in particular feel their service is poor value for money. Passengers that we have spoken to feel that the provision of rail services in the north of England does meet the basic needs for the journeys they make, and that on the whole, reliability of these services is satisfactory. As such, passengers' overall rating of value for money is a little above the national average for all TOCs, as shown in the graph below.

Figure 3: per cent very/fairly satisfied with value for money; NPS Spring 2012
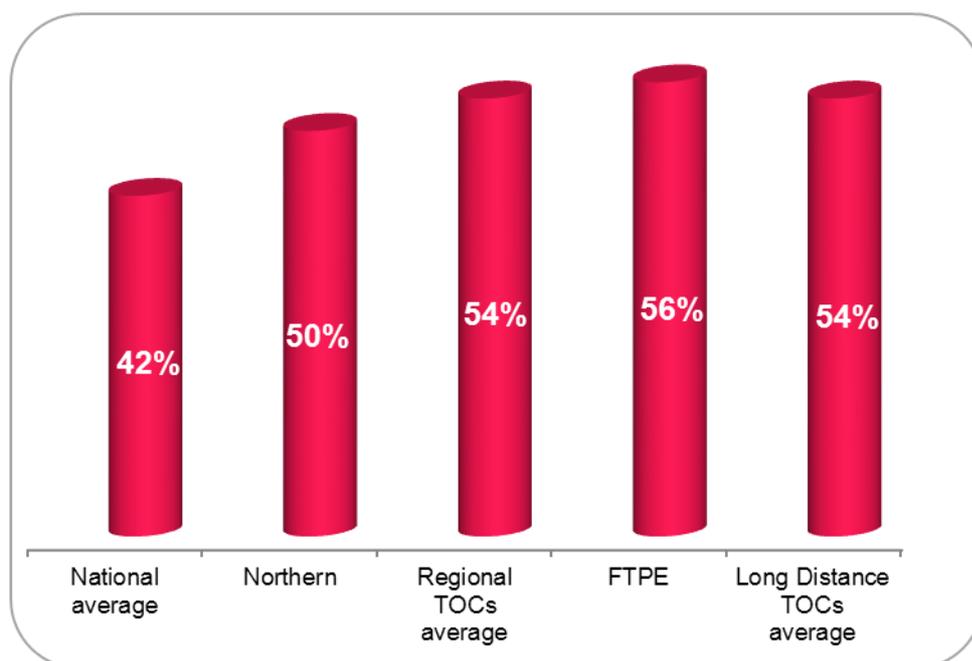
While passengers in the qualitative discussions talked about many things that could and should be improved in future franchises, current fare prices did not arise as a big issue. In fact some compared the cost of travelling by train in the north of England favourably to travelling by car, which can be expensive due to fuel and parking prices; by bus, which is inconvenient and slow; and to making other journeys, for example to London:

- "Price-wise they're not overly expensive… it's not prohibitively expensive." *Manchester Airport, business*

- "I don't mind. I get a weekly ticket which is £21. People who drive would put more than £20 of petrol in if they were doing that journey. For my business trips to Newcastle, again, I found this value for money." *Middlesbrough, business/commuter.*

While the price of rail travel on these routes is often seen to be fair at the moment, passengers expressed a resistance to rises, and there is a general concern about annual rises in fares which affect the whole country but do not appear to bring benefits to passengers locally:

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- "The train prices will go up again in January, above the rate of inflation, but you never see a difference in service and quality levels. I think they should be held more accountable to this." *Sheffield, commuter*

- "Pay increases can be made more acceptable by being able to physically see the evidence of the increase either at the stations or on the trains. Even if they had a 'progress poster' telling people what they had changed/invested in." *Sheffield, commuter*

While value for money is seen quite favourably in comparison to other TOCs, satisfaction is still not high, and so passengers feel there are opportunities to improve the feeling of value for the price they pay. These can be summarised as:

- Maintain and improve on the areas which are most important to passengers, and ensure that investment in these areas is visible to them:
    - Note that increases in fares to pay for such improvements would be unacceptable: passengers believe that fares already provide funds which should rightly be invested back into the service and that if improvements are made, more passengers will use the service meaning that improvements will be self-funding. These might be considered naive assumptions by some in the rail industry, but they are the real perceptions of passengers and so should not be easily dismissed.

- Cut out wastage and create a fairer system for all, by addressing the problem with fare evasion in particular.

7. Potential changes to the way services are structured

7.1 Implications of the operator brand for north of England rail services

Passenger Focus was keen to understand passenger perspectives about any company or branding changes that may take place from 2014 on the Northern and TransPennine franchises.

The Government is also considering the potential for these two franchises to be merged into one, and possibly for some remapping of services into the East Coast franchise. The June 2012 research therefore explored brand perceptions about the current operators to help understand the impact of potential changes to one or both brands in terms of corporate perceptions, train livery, staff uniforms, signage, style used in communications, and so on.

7.1.1 Considerations for changing operator

Although passengers had some clear opinions about the two companies, ultimately there is no significant brand loyalty, and in principle there is no issue for passengers in changing the operator and/or their branding. This is of course providing that the TOC(s) deliver an effective service which meets the needs and priorities of passengers as described in sections 5 and 6 of this report:

- "I'm not so concerned about the flag on the train. For me, it's about costing, reliability and access to a seat – which is what I pay for." *Manchester, leisure*

- "As long as it gets me there on time… I don't really think it matters who's actually taking me there, as long as the level of service is good." *Manchester Airport, leisure*

- "It's not really relevant who actually runs it, I just want it to run." *Sheffield, commuter.*

In fact some participants in this research made little distinction between the two current operators, partly due to very similar brand colourings, and some mistakenly referred to previous operators or other names, such as 'First North Western'. Further, where the remapping was discussed, only a few participants were aware of the East Coast operator.

While there was consensus from passengers that it does not matter who runs rail services, many did express some concern and scepticism about the money and time that might be spent on rebranding.

This is clearly likely if different operator(s) take over the franchise(s), but TOCs should take care that a new management is seen to bring benefits and improvements, so that any brand changes are not simply seen as an expensive 'painting over' of what remains the same service, and a change of names for the sake of it. Ultimately, while passengers see few disadvantages to changing operators, neither do they see obvious advantages so these need to be genuine, and need to be made clear:

- "I don't know what the advantage would be [of changing the TOCs]…they'd have to be doing it in my opinion for a beneficial reason, and not just for profit making." *Manchester, business*

- "It's just another rebranding exercise." *Manchester Airport, business.*

While passengers do not consciously mind who runs their services, the group discussions did highlight certain brand qualities held by the current operators, which can influence passengers' overall feelings towards the services they receive. These tie in with much of the more consciously-articulated advantages and areas for improvement as described through sections 5 and 6 above.

In summary, Northern Rail is seen as:

- Fairly 'functional' and trustworthy for the short, local 'everyday' journeys it is usually used for.

- A 'local' company, both due to its name, and its comprehensive local geographical coverage. The sense of being 'local' is positive in some ways, for example being associated with friendliness and accessibility; however it also has connotations as not quite 'professional' or fully credible, like a second-place option.

- Scruffy and out of date.

- Cost inefficient, not being up to speed with the way that train companies ought to be run 'nowadays.'

First TransPennine Express is seen as:

- More professional and 'solid' as a company

- For everyday use, but also trustworthy and credible enough for more 'special' uses such as a day out or a business meeting

- Comfortable and pleasant environment

- Affordable, in that services are enjoyable but not so aspirational as to be out of reach

- A cross-Pennine express service. The TOC name in this case is important in affirming this straightforward and appealing concept.

Whether they change or remain the same from 2014, future franchise operators should take note of these brand perceptions and work to avoid the negative areas and build on the more positive ones. Interestingly, many participants in this research made comparisons to Virgin Trains: this is seen as a much more luxury, aspirational and therefore expensive way to travel – although the higher cost is felt to be somewhat justified. Discussions indicated that there is no need for the Northern or TransPennine franchises to move towards this 'luxury' positioning, so long as passenger priorities for services appropriate to the journeys made on these routes are delivered.

Similar principles should be taken into account if some services are transferred to the East Coast franchise in future. The potential for this re-mapping was discussed briefly in Middlesbrough groups, as passengers in this location would be most likely to be affected by this.

As mentioned earlier, few in the groups were familiar with East Coast at present, but again they expressed no problems with this operator, or any operator, taking over certain services, providing that the operator managed the services in a way that best meets their needs, and providing that a change of operator brings passenger benefits rather than appearing to be little more than an administrative – or worse – a marketing exercise.

7.1.2 Merging the franchise to a single operator

As indicated above, ultimately Northern/FTPE passengers have little opinion about who runs rail operations, providing that an effective service is delivered. However, when asked to discuss the potential for merging the two franchises into one, passengers did identify some possible benefits:

- Greater efficiency and economies of scale to management of rail services:
  - "They'll have more money to spend between them to improve their services." *Manchester Airport, leisure*

  - "Surely half a dozen heads are better than one." *Manchester, leisure.*

- Improvement to the integration of timetables

- Improved communication across the network (particularly beneficial at times of disruption)

- Bring every route up to the same standard of service including in terms of rolling stock:
  - "The standard could go up to the 'highest common denominator'." *Middlesbrough, business.*

- Reduction of confusion about different ticketing rules.

In addition, there was a comment that the current division of franchises can appear arbitrary anyway, meaning that from the passenger perspective there should be no real problem with dividing franchises differently again if this could be of benefit to passengers:

- "I understand the threat of monopoly and all the rest, but there must be a bit of flex in there…it can be a completely false constraint." *Scotland, business.*

Despite recognising these potential benefits to a single franchise, many passengers were very concerned about a reduction in competition, which could lead to increased prices and a poorer standard of service:

- "When you have one company running everything, standards slip. A prime example is buses: around Leeds the only service you can use is First buses…I detest buses because of them." *Leeds, commuter*

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- "I mean, you've got to have some competition to keep the prices down. It's like with petrol companies. You go to one and find it's expensive so you go to the other and find it's cheaper – you've got a choice." *Middlesbrough, leisure.*

At the same time, passengers recognise that the two companies operate different types of services for different journey needs, and many passengers actually have little choice currently. Nevertheless this is a genuine concern, and so it seems on balance there would be no problem with merging the two franchises if this can bring benefits and providing that any changes are communicated in such a way that concerns about competition are alleviated.

7.2   Devolution of rail responsibility to local areas

The Government is also currently considering a devolvement of rail service specification and oversight to local governments and authorities rather than central government. The research sought to understand the passenger viewpoint on this.

Again, one important point is that passengers care about the delivery of services to meet their needs, over and above who is actually responsible for this - for many, the idea of devolution is irrelevant as they don't fully understand the franchise system at present and the difference between operator and government regulation:

- "To some degree, all that matters to me is getting from A to B efficiently, when I want to. So in a lot of cases, I don't really care who runs the service as long as it runs." *Middlesbrough, business*

- "Don't care – I have the same needs regardless of the operator." *Sheffield, commuter*

- "It's all so devolved [fragmented into TOCs] now that I doubt any traveller really understands the train network…there are so many players now…I don't really care." *Sheffield, business*

- "I'm not sure who has actual overall control, maybe no one." *Sheffield, commuter.*

Passengers do see some potential advantages to devolution:
- local government will have better understanding of local needs and so will be in a better position to manage rail services accordingly, and to think more creatively about the best use of funding
- for the same reasons, the important coverage of small towns and villages will be protected
- rail services may be better integrated with other modes such as trams and buses.

Some of the comments received were:

- "I can see...them wanting to keep local train services which central government may not understand the importance of, both from a social and an economic viewpoint." *Sheffield, business*

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- "Someone in central London doesn't understand how Walkden station operates do they? So why haven't we got a local government sorting it out?" *Manchester, leisure*

- "When you think about government it's so massive, and it's just getting lost, and it's just focussing on London, at least this way… I just think it's more specific, it just gives you a bit more faith…that's someone's job." *Manchester Airport, business.*

Passengers felt that direct ownership and accountability will mean that:
- there will be greater transparency for how funds are spent and how decisions are made
- personnel will have more time dedicated to issues affecting the region
- passengers will have increased dialogue with those involved, and greater opportunity to have their needs considered.

Some of the comments received were:

- "More accessible and not so remote…feels more like got to do something for the local community a bit more." *Manchester, commuter*

- "[They'd be] more receptive to public opinion." *Manchester, commuter.*

However, there will be some significant hurdles to overcome, in order to ensure that passengers genuinely buy into the idea of devolution. Firstly, there are real concerns about fragmentation and the potential for more confusion for passengers, and disagreements between geographic jurisdictions which in themselves could cost time and money.

For some, fragmentation would bring more disadvantages than benefits, and could actually fail to bring the main benefit of decentralisation, since some feel that regional centres such as Manchester or Newcastle would benefit from biases, leaving more rural locations in the same position as they are with centralised London-based government:

- "Potentially quite parochial…if what suits one doesn't suit another it's going to be death by committee before you know where you are." *Scotland, business*

- "By the very nature of transport you're ... crossing boundaries, so there needs to be some ...form of regulator with overall control." *Manchester Airport, business*

- "National government can set standards across the board for everyone." *Manchester, commuter.*

Secondly, the bureaucracy involved in re-structuring the way rail services are managed leads some passengers to question, given the current economic climate, whether now is the right time to pursue such a change:

- "If it's not broke, don't fix it. I just see it as another level of admin." *Scotland, business.*

Thirdly, and most importantly, there is a great deal of distrust in local government capability. This comes from experiences of mistakes or difficulties in local government handling of other issues, and witnessing the influence of funding constraints in local government. This

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experience leads people to doubt that local governments will have the expertise, resource, and organisational infrastructure to take on a responsibility as large as rail provision:

- "They haven't got enough resources to do what they're doing now, without taking over policing the way train companies are run." *Leeds, commuter*

- "If local authorities took over, that would equate to local standards…poorer standards and more errors." *Sheffield, commuter*

- "What do they know about running trains? They can't even get the roads right so how will they be able to take on trains as well?" *Sheffield, leisure*

- "You have councils who can't even empty a rubbish bin, are they really able to run a rail network?" *Leeds, leisure.*

This view was taken by many of the passengers we spoke to in Leeds, Sheffield, Middlesbrough and Lancaster. In Manchester, however, there was more trust in a local authority having responsibility for rail travel, and this is largely due to the existence of Transport for Greater Manchester (TfGM), which is seen to be a body which could feasibly do this:

- "TfGM is clued up about transport around the north west." *Manchester Airport, business*

- "I would see them [TfGM] to be coordinating the public transport…your buses and the trains and the Metrolink…things like that have become a lot, a lot easier…I might be giving them undue praise, but in my lifetime it has become a lot better…there just seems to be a greater plan." *Manchester Airport, business*

- "They have got a proven track record in this case, so perhaps I would feel more confident with them taking over responsibility from central government." *Lancaster/Manchester, business.*

This suggests that the resistance in other areas is partly because passengers cannot imagine a body that could take on this responsibility, and that once such a body is in place they will have opportunity to demonstrate to passengers that this is possible. The Manchester example suggests that there is scope for devolution to work and for the public to accept it. However, in moving towards devolution, the Government and organisations involved will need to address passengers' significant reservations, and demonstrate the real benefits of devolution to passengers.

Appendix 1: stated preference values

Q29/30 on the First TransPennine Express research looked at 'stated preference values' – ranking of most important things that could be improved on the route

Total Sample

Base: All who answered	Experiences (% rating it fairly or very good)	Priorities for improvement: rank order (stated preference score, where 1=highest priority and 12=lowest)	Priorities for improvement: indices
Punctuality/reliability of the train	84%	1	225
Value for money for price of ticket	52%	2	218
Being able to get a seat on the train	76%	3	170
Frequency of trains on this route	78%	4	150
Not having to change trains on this journey	83%	5	91
Length of time the journey was scheduled to take (speed)	80%	6	90
Upkeep/repair and cleanliness of the train	77%	7	71
Cleanliness of toilet facilities on the train	53%	8	70
Personal security whilst on board the train	76%	9	62
Quality of facilities and services at the station	68%	10	44
Connections with other train services	72%	11	43
Visibility of staff on the train	66%	12	36
Provision of information during the journey	72%	13	30
Overall experience of service on this journey	81%		

Route 1: North: Manchester to Glasgow/Edinburgh

Base: All who answered	Experiences (% rating it fairly or very good)	Priorities for improvement: rank order (stated preference score, where 1=highest priority and 12=lowest)	Priorities for improvement: indices
Value for money for price of ticket	56%	1	216
Punctuality/reliability of the train	87%	2	215

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Being able to get a seat on the train	76%	3	176
Frequency of trains on this route	76%	4	152
Not having to change trains on this journey	83%	5	97
Length of time the journey was scheduled to take (speed)	83%	6	82
Upkeep/repair and cleanliness of the train	77%	7	75
Cleanliness of toilet facilities on the train	52%	8	74
Personal security whilst on board the train	76%	9	58
Quality of facilities and services at the station	67%	10	45
Connections with other train services	72%	11	43
Visibility of staff on the train	69%	12	38
Provision of information during the journey	74%	13	29
Overall experience of service on this journey	81%		

Route 2 - North East: Liverpool to Hull/Scarborough/Middlesbrough/Newcastle

Base: All who answered	Experiences (% rating it fairly or very good)	Priorities for improvement: rank order (stated preference score, where 1=highest priority and 12=lowest)	Priorities for improvement: indices
Punctuality/reliability of the train	79%	1	256
Value for money for price of ticket	45%	2	219
Being able to get a seat on the train	75%	3	164
Frequency of trains on this route	82%	4	142
Length of time the journey was scheduled to take (speed)	77%	5	105
Not having to change trains on this journey	84%	6	83
Personal security whilst on board the train	77%	7	66
Upkeep/repair and cleanliness of the train	75%	8	63
Cleanliness of toilet facilities on the train	51%	9	61
Connections with other train services	71%	10	40
Quality of facilities and services at the station	69%	11	40
Visibility of staff on the train	63%	12	32
Provision of information during the journey	70%	13	30
Overall experience of service on this journey	80%		

Route 3 - South: Manchester to Cleethorpes

Base: All who answered	Experiences (% rating it fairly or very good)	Priorities for improvement: rank order (stated preference score, where 1=highest priority and 12=lowest)	Priorities for improvement: indices
Value for money for price of ticket	52%	1	204
Punctuality/reliability of the train	87%	2	203
Being able to get a seat on the train	75%	3	163
Frequency of trains on this route	79%	4	144
Length of time the journey was scheduled to take (speed)	78%	5	98
Not having to change trains on this journey	81%	6	86
Upkeep/repair and cleanliness of the train	79%	7	78
Cleanliness of toilet facilities on the train	61%	8	75
Personal security whilst on board the train	73%	9	74
Quality of facilities and services at the station	67%	10	51
Connections with other train services	72%	11	50
Visibility of staff on the train	64%	12	40
Provision of information during the journey	72%	13	34
Overall experience of service on this journey	79%		

Appendix 2: qualitative research sample summary

Group 1	Group 2

• Manchester
• Commuters into city centre
• 50 per cent travelling within PTE area, 50 per cent from outside PTE area to inside
• Two each of:
  o Northern-only users
  o FTPE-only users
  o Have choice but use Northern
  o Have choice but use FTPE
• Age 40-60.
	• Manchester
	• Leisure travellers into and around city
	• 50 per cent travelling within PTE area, 50 per cent from outside PTE area to inside
	• Two each of:
	  o Northern-only users
	  o FTPE-only users
	  o Have choice but use Northern
	  o Have choice but use FTPE
	• Age 55+.

Group 3	**Group 4**

• Middlesbrough
• Commuters to/from Newcastle, Northallerton or York
• Two each of:
  o Northern-only users
  o FTPE-only users
  o Have choice but use Northern
  o Have choice but use FTPE
• Age 35-55.
	• Middlesbrough
	• Leisure travellers to/from Newcastle, Northallerton, York, Whitby or Durham
	• Two each of:
	  o Northern-only users
	  o FTPE-only users
	  o Have choice but use Northern
	  o Have choice but use FTPE
	• Age 18-25.

Group 5	**Group 6**

• Sheffield
• Commuters to/from Manchester, Stockport or Doncaster
• 50 per cent travelling within PTE area, 50 per cent from outside PTE area to inside
• Two each of:
  o Northern-only users
  o FTPE-only users
  o Have choice but use Northern
  o Have choice but use FTPE
• Age 35-55.
	• Sheffield
	• Leisure travellers to/from Scunthorpe or Cleethorpes
	• 50 per cent travelling within PTE area, 50 per cent from outside PTE area to inside
	• Two each of:
	  o Northern-only users
	  o FTPE-only users
	  o Have choice but use Northern
	  o Have choice but use FTPE
	• Age 25-40.

Group 7	**Group 8**
• Lancaster • Commuters to/from Bolton, Blackburn or Blackpool • A third of the group travelling to/from each of these	• Lancaster • Leisure travellers to the Lake District (Oxenholme, Kendal, Windermere etc) • Two each of: o Northern-only users

• Two each of:
  o Northern-only users
  o FTPE-only users
  o Have choice but use Northern
  o Have choice but use FTPE
 • Age 25-40.
	o FTPE-only users
	   o Have choice but use Northern
	   o Have choice but use FTPE
	 • Age 40+.

Group 9
 • Leeds
 • Commuters to/from Selby, York or Huddersfield
 • 50 per cent travelling within PTE area, 50 per cent from outside PTE area to inside
 • Two each of:
  o Northern-only users
  o FTPE-only users
  o Have choice but use Northern
  o Have choice but use FTPE
 • Age 20-30.
	Group 10
	 • Leeds
	 • Leisure travellers to/from surrounding towns
	 • 50 per cent travelling within PTE area, 50 per cent from outside PTE area to inside
	 • Two each of:
	  o Northern-only users
	  o FTPE-only users
	  o Have choice but use Northern
	  o Have choice but use FTPE
	 • Age 35-50.

10 teledepth interviews – business

Two business travellers in each of the five locations described above:

- depths in Manchester were of business travellers who go to Manchester Airport
- spread of age and gender
- spread of people using Northern/FTPE both with and without choice
- spread of people travelling inside and outside of PTE areas.

Two teledepth interviews – leisure

Two leisure travellers who travel to Manchester Airport by train.

Appendix 3: benchmark groupings for NPS comparisons

The following routes are included in the 'route type' benchmarks in this report:

- **Interurban routes**
  Used as benchmark for FTPE North West and South routes, and for Northern Rail South & East Yorkshire route
    - Arriva Trains Wales: North Wales
    - Arriva Trains Wales: South Wales
    - Chiltern Railways: North
    - Crosscountry: Birmingham - Manchester
    - Crosscountry: Nottingham - Cardiff
    - East Coast: non-London journeys
    - First TransPennine Express: North West
    - First TransPennine Express: South
    - Greater Anglia: intercity
    - London Midland: West Coast
    - Northern: South and East Yorkshire
    - ScotRail: interurban
    - South West Trains: mainline
    - Virgin: Birmingham – Scotland.

- **Long distance routes**
  Used as benchmark for FTPE North route
    - Crosscountry: Birmingham - North East and Scotland
    - Crosscountry: Birmingham - South Coast
    - Crosscountry: Birmingham - South West
    - Crosscountry: Birmingham - Stansted
    - East Coast: Newcastle and Scotland
    - East Coast: London - North East and Scotland
    - East Midlands Trains: Liverpool - Norwich
    - First TransPennine Express: North.

- **Rural routes**
  Used as benchmark for Northern Rail Lancashire & Cumbria and West & North Yorkshire routes
    - Arriva Trains Wales: Valley
    - First Great Western: West
    - Greater Anglia: Rural
    - Northern: Lancashire and Cumbria
    - Northern: West and North Yorkshire
    - ScotRail: rural
    - South West Trains: Island line
    - South West Trains: not managed by South West Trains
    - South West Trains: West of England.

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- **Short Commute routes**

  Used as benchmark for Northern Rail Manchester and Liverpool, and Tyne Tees and Wear routes
    - c2c
    - East Midlands Trains: local
    - First Capital Connect: Thameslink loop
    - Greater Anglia: metro
    - Greater Anglia: West Anglia
    - London Overground: Gospel Oak - Barking
    - London Overground: Richmond or Clapham - Stratford
    - London Overground: Watford - Euston
    - London Overground: Dalston - Croydon
    - London Midland: West Midlands
    - Merseyrail: Northern
    - Merseyrail: Wirral
    - Northern: Manchester and Liverpool
    - Northern: Tyne Tees and Wear
    - ScotRail: Strathclyde
    - South West Trains: London
    - South West Trains: metro
    - South West Trains: suburban
    - Southeastern: metro
    - Southern: metro.

Appendix 4: discussion guide

Please note, due to the dynamic nature of discussion groups, sections will have been moved around and covered in greater/lesser depth as appropriate within each session.

Discussion guide (1 hr 45mins)
Northern / TransPennine Refranchise Research

1. Introduction *(5mins)*
- Introduction and thank respondents for taking part
- Brief background to Passenger Focus
- Explain purpose of research, i.e.to find out about passengers' experiences of and views about travelling by train
- Confidentiality issues/reassurances
- Permission to record

- BRIEF: Respondents work in pairs to introduce each other:
    - Personal details
    - Description of recent train journey – where to/from, purpose, overall opinion of experience, and notable highlights/negative points
    - *Observe for spontaneous mentions of Northern Rail / FTPE (or other) brands*

2. Respondent context – rail travel behaviour *(5mins)*
- Brief descriptions of recent/usual train journeys (if not already arisen in introduction above)
    - Where to/from, what time
    - How frequently?
    - What was the purpose of the journey?
    - Who else did you travel with?
    - Which company runs the train service? *(Observe for spontaneous opinions of TOCs)*
- Why do you use the train for this journey?
    - What other modes could you use?
    - *Allow discussion of Value For Money (VFM) versus buses in particular, if this comes up spontaneously*

- BRIEF: What other types of journey do you make by train?
    - Journey details
    - Which train companies run these services?
    - Why do you travel by train for these types of journeys? *Allow discussion of VFM versus buses/cars in particular, if this comes up spontaneously*

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3. Overview of opinions of relevant train services *(5mins)*

- What are the really good things about the Northern train services for your commuter/leisure [as relevant] journeys? / If a new company was to take over this service tomorrow, what things should they maintain?
- Repeat for FTPE
    - o What impact does that have on you?
    - o Why is this good?

- What are the negative things about Northern train services? / What needs to be improved?
- Repeat for FTPE
    - o Why is that a problem?
    - o What impact does it have on you?
    - o How exactly should it be improved – what would the ideal look like?

4. Train operating companies *(25mins)*

- Introduce brand mapping exercise:
1) Moderator to hold up a series of cards with logos of companies *(see page 7 for suggested list)*
2) Group to shout out initial impressions of each – must be 'quick fire' reactions to gauge top of mind opinions, but allow brief debate if differing opinions arise for <u>rail</u> brands
3) Next, group to take the pile of cards and group the logos by themes, explaining/debating their rationale(s) for the theme(s)
(discourage groupings by industry, e.g. "train companies"' "bus companies")
4) Next, give group additional cards with phrases on journey types*.* Group the brand logos against these phrases, explaining/debating rationale; moderator to probe on the reasons for placement of logos

- Probe on spontaneous reactions and brand mapping of Northern and FTPE
    - o We talked about xx being a positive point about Northern/FTPE services at the moment
        - Does Northern/FTPE [i.e. the other one] do that well?
        - Which other companies here could do that well if they ran the train service, why? *(Allow participants to suggest other TOCs as well as non-TOCs)*
        - And which companies do you think would not be able to do this? Why?
        - Prompt if needed: describe this aspect of the service if Northern / FTPE ran it instead?
    - o Repeat for negative elements of current service

- Pick out specific journeys made by 1 or 2 participants, for which they use <u>FTPE</u>:
    - o Explore brand perception of Northern
        - If <u>Northern</u> ran these services as well as all the services they currently run, what would you think of Northern?
        - Would you change any of the brand mapping groupings if Northern ran this service?

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- ▪ Would this improve or worsen your impression of Northern?
  - o Explore any further perceptions of service delivery of Northern
    - ▪ This particular journey, as you mentioned, is currently run by FTPE. Describe what would be different about it, if it was run by Northern.
    - ▪ And what would change about the services that Northern currently run, if they were to cover more routes?

    Observe differences between the users of the different TOCs, and allow debate. Show large scale route maps if helpful.
- Repeat for First TransPennine Express vs Northern
- If you do have the choice between Northern/TPE services, why do you choose Northern /TPE?

- *For Middlesbrough, and groups where some participants are familiar with East Coast services:* Show map of relevant Northern/TPE services which could be migrated to the next East Coast franchise
  - o Does anybody in the group use these services?
  - o What about if East Coast ran them – how would that make you feel about East Coast?
  - o Describe what the service would be like if run by East Coast instead of Nothern/FTPE
    - ▪ If not come up spontaneously, prompt on how travel connections within/beyond this area might be affected

- Summary: one <u>possibility</u> is that all of Northern and FTPE services would be combined and run by a single company
  - o What would be the benefits of this to Northern customers, why?
  - o What would be the benefits of this to FTPE customers, why?
  - o What would be the disadvantages to Northern/FTPE customers, why?
  - o Prompt if needed on the need (or otherwise) to rebrand stations/train livery/uniforms, etc. What would be the advantages and disadvantages of this, e.g. easy for passengers to understand who to go to, sense of being modernised, updated training and motivation for staff, versus cost, time, confusion for passengers.

5. Specific service issues *(30mins)*
- Pick up on improvements suggested spontaneously by the group in section 3 first, followed by prompting on others, covering all of the below
- *Note, much of the below is likely to come up naturally as part of the discussion above about brands and what different train companies currently/could offer. Therefore the below is just a prompt to ensure that all the points are covered if not already – we will not go through all of section 5 as a separate detailed section.*

- Service patterns and crowding
  - o What times of day do you usually travel for your commute to work / what time of day did you travel when you made your most recent train journey (for leisure)?
  - o What do you think about the time your most regular journey takes? Are the trains frequent enough at this time of day? Can you travel from your nearest station for this journey?

- o What time would you like to travel – if different? Can you travel at this time of day?
- o Are there times/days where you cannot currently travel by train? What kinds of journeys are you unable to make? Does this matter?
- o If you were re-designing the timetable:
  - What times would the first and last trains be on weekdays? Why – what would the benefits of this be, who would use these services?
  - How frequently would they run?
  - What about on Saturdays/Sundays? Do you need any trains on Saturday/Sunday?
  - What about bank holidays, and Easter/Christmas/school summer holidays?
  - If you were a train company-what if I said that this number of services was too expensive: where would you make cuts/reductions? What would be the disadvantages of this, who would lose out? What is a good balance?

- o How crowded is the train? Do you usually get a seat? Is it easy to stand (handholds etc)?
  - Do/have/would you change your plans/not travel at certain times to improve chances of getting a seat?
  - What should be done about overcrowding?

- o The rail networks need to be maintained and sometimes upgraded, which means that parts of the railway need to be closed at times for engineering works
  - BRIEF: When would be the best time for engineering works to take place?
  - Passengers have said that Easter and Christmas holidays are inconvenient times for engineering work – what do you think about this? Why?
  - The same people suggested that school half terms and summer holidays are some of the best times for engineering works (other than overnight). What do you think about this? Why?

- Direct/stopping services
  - o Thinking about your usual commute / your recent journey for leisure:
  - o Do you need to change trains or is the service direct?
  - o What would it be like for you if they changed this? What would be the benefits and disadvantages?
    - Prompt if needed: e.g.
    - The ticket price might be higher for a direct service/lower for indirect. What would you do if the alternative became the only option / what would you do if you had the choice of a (dearer) direct train or a (cheaper) indirect train
    - More people might travel on the direct train, so it might be harder to get a seat

- Making it necessary to change might mean the trains could serve more individual stations along the route, as a result of taking a more roundabout route
- The direct train is likely to be faster (but what if the direct train was slower overall because it uses a longer route – would you prefer the direct train in this scenario?)
  - How often does the train stop along the route?
  - What do you think about that? What would be the benefits and disadvantages of stopping more /less often? Who would benefit/lose out?
    Prompt if needed: e.g.
    - The ticket price might be higher for a faster train which stops less often
    - More people at smaller stations could use the train if it stopped there
    - A stopping train might be less popular, meaning more seats might be available
    - There might be new connections between some of the smaller stations

- Staffing
  - Where do you see staff when making rail journeys? What do they do?
  - What are your impressions of xxx type of staff? *(repeat for all mentioned; ensure staff working on trains and stations are covered)*
  - What could be improved about the staff on trains? And at stations? (Prompt if necessary: the number of staff / attitude / training, etc; specifically in relation to ticket purchase/checking during delays, for security and information provision)
  - Are they needed there/in that role? What would happen if they were not there?
  - Where do you not see staff / where should there be (more) staff?

- IF TIME: Information channels
  - How do you currently find out about train times, platforms, prices, etc?
    - What are the good things about these information sources?
    - What could be improved?
    - Are there any other ways you would like to find this information? Why would xxx be good?
    - Prompt if needed: what about finding information via a Smartphone app? Would you use this, why/why not? What kind of information would you expect to find?
    - Repeat for social media, e.g. Twitter
  - Repeat above for finding out about disruption – planned and unplanned

- Upkeep of trains (if this has not arisen e.g. in brand association/mapping section)
  - Tell me about the environment on the trains for your journey
  - Prompt if necessary on cleanliness of trains (including toilet facilities) inside and out, age and upkeep, and how these compare to other trains the participants have experienced
  - Does it matter?
  - What impact would it have if the upkeep of trains was improved?
  - What might be the disadvantages (e.g. what about cost)?

bdrc continental

- o *Allow debate and observe differences between users of Northern vs FTPE*
- o If a new company was to take over the services you use, should they just clean the trains, upgrade/refurbish, or bring in brand new vehicles?
    - ▪ What would you think if they did each of these?
    - ▪ What impact would each have on you personally?
    - ▪ Prompt if not come up spontaneously: how do you think a new company should pay for this? What would you think if ticket prices increased but you had cleaner/newer/more spacious trains?

- • IF TIME: Ticket types
    - o What type of ticket do you use for your usual commute/recent leisure journey?
    - o What other types of ticket exist or could you use?
    - o What other types of ticket might be good that aren't currently available? Why?
        - ▪ Prompt if needed: e.g. rovers, loyalty schemes, specific regional/PTE tickets, combination rail/bus/tram etc tickets, group/couple discounts, carnets, off-peak season tickets, early bird etc.
    - o *Observe for how much participants know / think they know about the range of tickets, and for spontaneous mentions of how easy it is to understand and achieve the best ticket*
    - o How do you/would you like to find out about the different types of ticket? (likely to overlap with 'Information' topic above
    - o How could the train company make it easier for passengers to get the best deal when they buy tickets?

- • BRIEF: Value for money (if this has not arisen earlier)
    - o How much do you pay for your train ticket for your usual commute/recent leisure journey?
    - o How does this compare to other train journeys / other modes (especially bus)?
    - o Is it value for money?
    - o What would damage the feeling of value for money? What would improve it?
    - o Is it reasonable to pay a premium for faster and modern services?

6. Devolution *(20mins)*
- • Tell me who you think controls train services in this area at the moment?
    - o And what do you think about this?
    - o *Allow spontaneous discussion based on how participants <u>think</u> the railways are managed*
- • [If needed]: Rail services are actually controlled partly by the government. Train companies bid to run certain sections of the national rail network, including promising to run services in a certain way to meet government requirements, and to meet passenger needs
    - o What do you think about this?
    - o Are there other ways that rail services could be managed?
- • One option that is being considered is that local authorities/PTEs [check respondents know what PTE means] could have more influence over the way train services are run, and how they are paid for

- *For example, if TfGM had more influence over train services in this area, rather than central government, they might:*
  - *Have more control over ticketing, for instance they might introduce zonal fares (like London zones 1-6), and smartcards to enable this*
  - *Have more influence over the introduction of new lines, services and rolling stock*
- *Also refer to examples from Merseytravel and TfL – last page*

- What do you think about this?
  - Tell me what rail services would be like if this worked really well. Why would that be the case; what should local authorities / PTEs do to make sure this happens?
  - Tell me what rail services would be like if this didn't work at all. Why would that be the case; what should local authorities / PTEs do to ensure this doesn't happen?
  - Example: for TfGM:
    - Who in the room lives/travels within Greater Manchester, and who doesn't?
    - What would be the differences in how this impacts on you?
    - *For example: living within GM you may have the chance to participate in consultations to any proposed changes to services, and you could consider the transport policies of different candidates when you come to vote in local elections. Those living outside GM would be affected by the decisions made by TfGM but would not have any influence on those decisions.*
  - On balance, is this a good idea or not?

  - Who do you think should be responsible for the following (local government, transport companies, national government (including DFT)
  - *Use flip chart with these aspects of services pre-written on, discuss with group which body(ies) should be written next to each, i.e. which body(ies) should be responsible for each*
    - Station upkeep
    - Specifying performance targets *(e.g. targets for number of trains on time and what constitutes 'on time')*
    - Determining the right balance between fares levels and the amount of funds available for improving rail services *(i.e. income received from fares is one of the principal means of ensuring that net spending on rail within an area is kept within budget. It can also be a means of managing demand on a network and for providing funds for enhancing the network)*Investment in new stations and lines
    - Decisions about number of carriages/services per day in order to manage levels of crowding on trains
    - How train services integrate with other transport (e.g. tram/bus services – this is most likely to be possible in devolved areas)
    - Safety /Security
    - Accessibility

- o IF TIME: If the local authority / PTE had responsibility for these things *(as recorded on flip chart),* they would need to fund this (but would get additional funds from the government to do so)
    - What do you think about this – any concerns? How would this impact on other services run by local authorities, e.g. housing?
    - *Observe any spontaneous discussion of elected mayors*

- o What other examples are there, of localised authorities taking on some of the central governments responsibility for transport? (Prompt if needed: e.g. Wales, London, Scotland).
    - Thinking again about the problems with rail services at the moment, bearing Wales/London/Scotland in mind, could these problems be helped by this type of devolution ("sharing out of responsibility")?

- o *Throughout this section: observe for whether respondents care about who is responsible, and prompt after discussing the above*

7. Closing *(10mins)*
- Earlier we talked about the positives and negatives of the train services you use in this area
    - o Now that we've talked in more detail, are there any other things that you think are really good about the current service?
    - o And any things that really need to be improved?

- Finally, if you could speak to the people who will manage train services on your usual routes in the future, what one thing would you want them to take from this session?

- If time, any questions from observers if present
- Invite any other final comments from group
- Thank and close

Brands for mapping exercise

(NB we don't propose to use all of these in every group, just a selection to get a range)

Facebook	Tesco
Apple	Morrisons
Northern Rail	Co-operative (supermarket)
First TransPennine Express	HSBC
East Coast	Barclays
CrossCountry	Yorkshire Building Society
Virgin Trains	Nationwide
Merseyrail	Barnsley Building Society
Newcastle Metro	British Gas
Scotrail	EDF Energy
Stagecoach	Dee Valley Water / Northumbrian Water /
National Express	Yorkshire Water (as relevant)
Megabus	Vodafone
Arriva Trains Wales	Orange
Eurostar	Sky
British Airways	BMW
Virgin Atlantic	Ford
EasyJet	Kia
Aer Lingus	

Suggested phrases for brand mapping

Going to work
Going to a business meeting
Day out with the kids
Day trip to visit family
Holiday in the UK
Going to a wedding
Night out at theatre/cinema
Drinks with friends
Shopping

bdrc continental

TransPennine Express data summary

This is a summary of the research conducted by Passenger Focus within the TransPennine area. Further details can be found on the Passenger Focus website[1].

Questionnaires were distributed to passengers across three routes:

- North Manchester to Glasgow/Edinburgh (includes passengers travelling on branch lines to Windermere, Barrow-in-Furness and Blackpool North)

- North East Liverpool to Hull/Scarborough/Middlesbrough/Newcastle

- South Manchester to Cleethorpes.

Fieldwork was conducted between 25 February and 14 March 2010, during which 2917 completed questionnaires were received from passengers travelling on TransPennine Express lines.

Most passengers were travelling for leisure (49 per cent) or commuting (36 per cent); only a minority of passengers were on business trips (15 per cent).

Passengers were asked whether they could have used a Northern rail service instead of TransPennine, but 45 per cent said they weren't sure. Over a third (34 per cent) didn't have a choice about which operator they used, while a fifth of respondents (20 per cent) could have used a Northern service, instead of that particular TransPennine service, but chose not to. Reasons given included that:
- it was faster with fewer stops (55 per cent)
- the train time suited them best (46 per cent).

Train times
Between Monday and Friday, two thirds of respondents felt that the first train currently leaves at an appropriate time. However, on Sunday, less than half felt this to be true (48 per cent) with 26 per cent saying that the first train on a Sunday should leave much earlier than it does at present.

Fewer respondents felt that the last train of the day leaves at an appropriate time (41 per cent), in particular on Saturdays where only 29 per cent thought that the last train left at an appropriate time. In fact 39 per cent said that they thought the last train on Saturday should leave much later than it does at present.

While most people were fairly or very satisfied with the frequency of service from Monday to Friday (77 per cent) and on Saturday (73 per cent), this decreased on a Sunday to 58 per cent. If trains were **less** frequent on the route, 28 per cent would make the same number of journeys, while 46 per cent would possibly or definitely make fewer journeys. If trains were **more** frequent 41 per cent would make the same number of journeys, while 38 per cent would possibly or definitely make more journeys.

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[1] http://www.passengerfocus.org.uk/research/publications/transpennine-express-results-tables

Over a third (39 per cent) of both peak time and off-peak travellers said that one service every hour between Manchester Piccadilly and Leeds should be non-stop. Off-peak travellers were more likely to think the service should stay the same as it was currently (23 per cent) than peak travellers (14 per cent). More peak travellers thought that all services should be non-stop (24 per cent) than off-peak travellers (10 per cent).

Seating
Three quarters of respondents (75 per cent) were always or usually able to get a seat on the train, while around 5 per cent said that seats were rarely or never available on their journeys. This applied to all three routes.

Manchester airport services
Almost two thirds of those surveyed (62 per cent) had not used the train service to Manchester Airport in the past 12 months. Of those who had, most used it for leisure travel.

Almost four in five airport passengers were satisfied with the frequency of trains to the airport (79 per cent) and speed of journey (78 per cent) while fewer passengers were satisfied with connections with other train services (53 per cent) and ease of changing trains at Manchester Piccadilly station (54 per cent).

Overall Journey
Passengers on all three routes were broadly satisfied with their overall journey, with 81 per cent rating it very/fairly good, and with all three routes having similar levels of overall satisfaction. Journey ratings varied considerably for different aspects – 84 per cent rated the punctuality/reliability of the train as very/fairly good, while just 52 per cent thought value for money was very/fairly good.

Priorities for improvement on TransPennine services
Passengers were also asked to rank their priorities for improvement. Punctuality/reliability was the number one priority for improvement; however, it was also the highest scoring area for satisfaction.

The second highest priority for improvement was value for money for the price of the ticket; the lowest rated for actual experience, with just over half rating it as fairly or very good.

	Experiences (% rating it fairly or very good)	Priorities for improvement: rank order
Punctuality/reliability of the train	84	1
Value for money for price of ticket	52	2
Being able to get a seat on the train	76	3
Frequency of trains on this route	78	4
Not having to change trains on this journey	83	5
Length of time the journey was scheduled	80	6

to take (speed)		
Upkeep/repair and cleanliness of the train	77	7
Cleanliness of toilet facilities on the train	53	8
Personal security whilst on board the train	76	9
Quality of facilities and services at the station	68	10
Connections with other train services	72	11
Visibility of staff on the train	66	12
Provision of information during the journey	72	13
Overall experience of service on this journey	81	
Key: green highlights = highest scoring factors yellow highlights = lowest scoring factors		