



**Arriva Trains Wales**  
*Ian Bullock, Managing Director*

# Where were we 2003?

- **Performance**
  - Averaged high 70% / low 80s
- **Low growth**
  - In the 7 years leading up to Franchising only 29%
- **Investment**
  - Only £400k required in 15 year franchise
- **Declining subsidy**
  - Real term fall in subsidy each year - reducing cost to Government



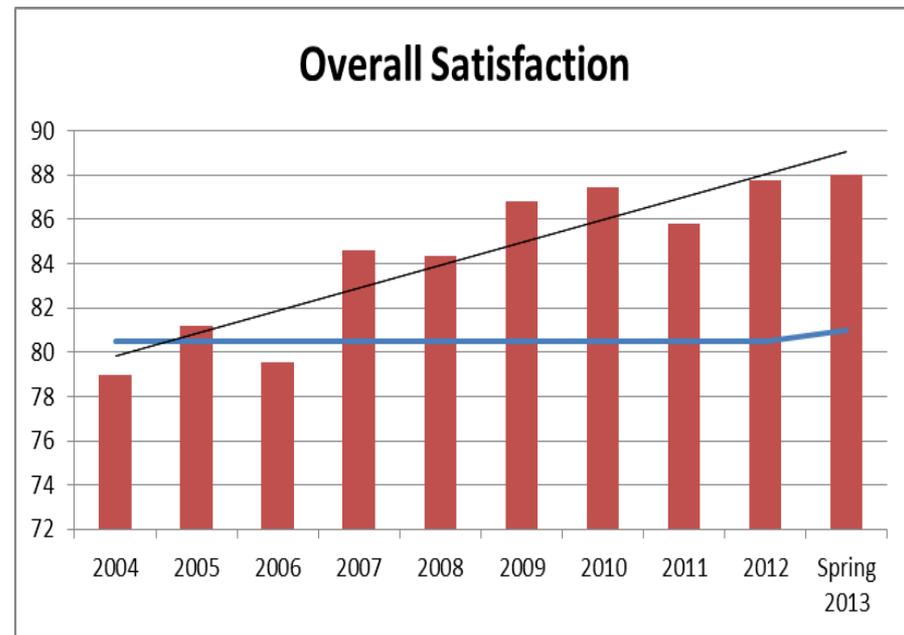
# Where we are now...



- **Performance**
  - Top 5 performer ave. circa 94% ppm top 2 'right time' operator in the UK
- **Growth**
  - Passenger numbers up 66% in 10 years, now 30m passenger journeys pa.
  - 20% more services than contract requires.
- **Financially sound**
  - Created 300 more jobs and credible railway for investment
- **Investment**
  - £30m invested by ATW – contract requirement £400k so where has some of the the money gone ?

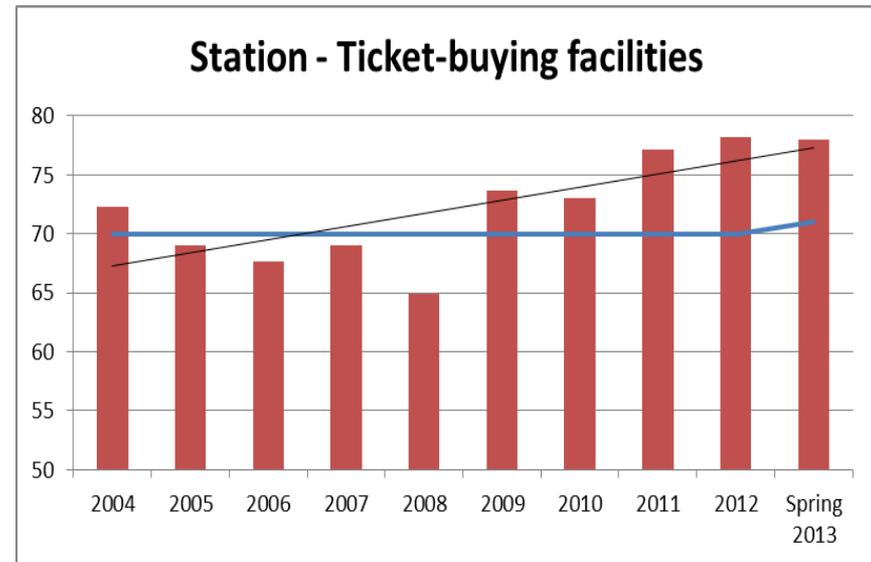
# What do our passengers say?

- Record levels of 88% satisfaction as measured by Passenger Focus
- All 13 contractual benchmarks exceeded
- 32 NPS areas tracked since 2003; 31 up
- Only area down (by 4 points) is “Value for money”
- Lowest scoring area is Dealing with delays at 38%



# Example of how we use the NPS data

- Station ticket buying score steadily falling from 72% to low of 65% in 2008
- In response ATW have invested £2.5m in 123 TVMs
- Score has risen gradually up to 78%



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# Other Investment



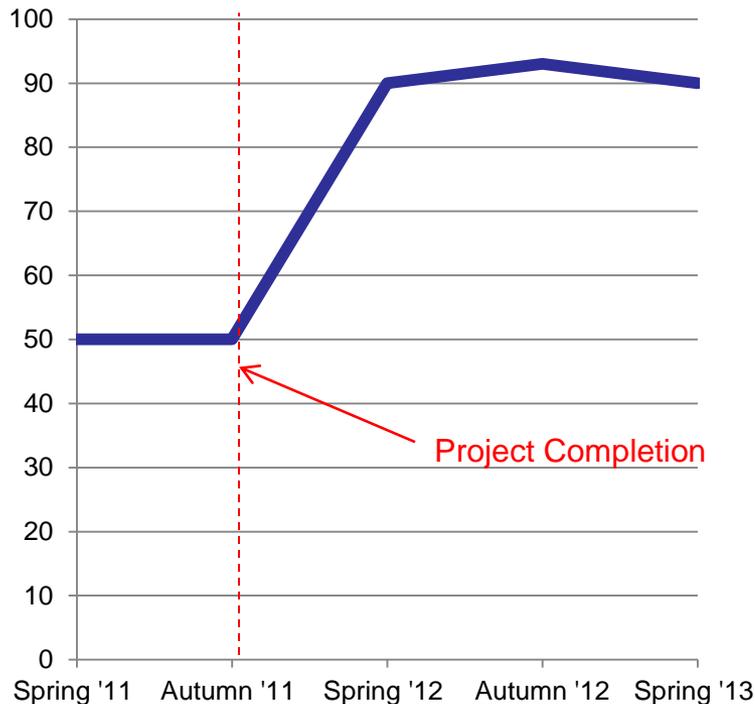
- Circa £30m
- Train passenger environment
  - Class 142/3, Class 150 and Class 175
- New Machynlleth depot
- New staff facilities
  - 4 driver simulators
  - Break areas at depots and stations
- Passenger safety – including PCSOs, security guards, enhanced revenue protection and CCTV on trains and stations
- Improved stations: facilities, booking office and car parking

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# Securing of third party funding and delivery of partnership projects

## Overall satisfaction with Swansea station



## Project Delivery Case Study: Swansea

£7.6m enhancement project funded by Welsh Government and Network Rail, delivered by Arriva Trains Wales.

As well as featuring enhancements to Customer facilities, also included significant accessibility improvements.

Customer satisfaction with the station leapt from 50% to 93% following project completion.

National Rail Awards 2013 Medium Station of the Year.

International Stations Awards, Best Large and Best Overall station 2012.



## Swansea Station



## Swansea Station



**ARRIVA**

Trains Wales  
Trenau Arriva Cymru

TEN YEARS OF SERVICE DEG MLYNEDD O WASANAETH

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# Swansea Station

# Partnership working

- Success leveraging in 3<sup>rd</sup> party investment
- Work closely with WG to deliver their aims:
  - Vale of Glamorgan reopening 2005
  - Ebbw Valley reopening February 2008
  - Gowerton frequency improvements
  - North-South Service – ‘Y Gerallt Gymro’
  - Class 158 Refurbishment
  - Additional services Fishguard
- Developing closer working relationship with NR – signed MOU and work streams
- Unique tripartite working in Local delivery Group - NSIP



# Future Challenges

- Improve operational performance
- Passenger growth v capacity (risk to growth)
- Economy in Wales - uncertainty/volatile revenue
- Big re-franchising agenda
  - e.g. Northern hub, Great Western
- Impact of major projects; CASR, VLE
- Future Franchise
  - Outputs and affordability?



*Proud to have you on board*