

<b>Board Meeting Paper</b>	
<b>May 13 BM 7.0</b>	
<b>Report for</b>	Decision <input type="checkbox"/> Information <input checked="" type="checkbox"/>
<b>Restricted or confidential Information?</b>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
<b>If confidential, protective marking<sup>1</sup></b>	
<b>Date of Meeting</b>	16 May 2013
<b>Agenda Item</b>	7.0
<b>Report Title</b>	Review of passenger and industry facing work
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**1. Making a difference using our research and policy evidence**

During the quarter the team focused their work around the following core activities:

**Using National Passenger Survey results with train operators**

The team met with many train operating companies (TOC) and other key regional/national stakeholders to present the results of the autumn 2012 National Passenger Survey (NPS) and to seek commitment from operators to agree action plans to tackle areas where improvements were identified.

This work included:

- Discussions with several TOCs - Northern Rail, East Coast Trains, Arriva Trains Wales, First ScotRail, Greater Anglia, First Capital Connect, London Midland and Southern to present NPS results and develop action plans for service improvements for passengers
- Presentations to two Regional Transport Partnerships in Scotland on rail passenger priorities and emerging trends from the most recent NPS publication
- Analysis of NPS data for distribution across Transport Consortia in Wales
- A presentation to “West Coast 250” on the latest NPS results for those TOCs who operate on the West Coast Main Line

Two specific examples to further illustrate our NPS influencing work with TOCs include:

**Greater Anglia** – Presentation of NPS results to senior executive of the TOC which included about 15 staff. The DfT’s Franchise Manager for the Greater Anglia franchise also attended.

NPS results had improved in many aspects. We identified that interior cleanliness as an area that drove passenger satisfaction but needed attention and improvement by the TOC. We agreed to follow up by meeting with their Head of Train Presentation at one of their depots to review their onboard cleaning regime. The meeting scheduled for May 2013 will again also include the DfT Franchise Manager.

<sup>1</sup> ie RESTRICTED plus COMMERCIAL / POLICY / STAFF / PERSONAL PROTECT

**First Capital Connect** – Presentation of NPS results to the TOC’s senior executive team of about 10 people.

They asked for the presentation to be centred particularly on their management of disruption to services. We recognise this as being a key driver of passenger dissatisfaction when not carried out effectively.

In addition we identified particular areas that the TOC need to focus on including improvements needed with punctuality and train cleanliness. Follow up action plan discussions arranged for April 2013.

**National passenger representation**

In addition to work around the latest NPS results, in **Scotland** Robert Samson (Passenger Manager) met with officials of Transport Scotland to discuss the future ScotRail franchising plans and to review current First ScotRail performance. In **Wales** David Beer (Passenger Executive) continued his work with the “integrated ticketing and network efficiencies sub-group” of the Welsh Government’s task force. Contributed recommendations on smart ticketing, integrating services and specifications for core and connecting bus service network, with minimum standards for service frequencies of a south east Wales pilot scheme. Task force recommendations submitted to Minister early in March. Currently awaiting response from the Minister.

**Presenting Bus Passenger Survey results to bus operators and transport authorities**

Throughout February and early March 2013 the Passenger Team and Murray Leader (Senior Research Adviser) undertook a significant programme of presentations to bus operators and transport authorities covered by the work across 22 geographic areas of England.

This work brought us into direct contact with nearly 45 different organisations:

Authorities	Bus companies
Suffolk, Centro, Milton Keynes	Ipswich Buses, National Express, Stagecoach Warwickshire, Travel deCoursey
Metro, SYPTE, Darlington, Tees Valley, Middlesbrough, Hartlepool, Stockton, Redcar-Cleveland, Northumberland, Worcestershire, Nexus	First Yorkshire, Stagecoach North East, Go Northeast, Arriva North East, First Worcestershire, Rotala
Hampshire, West of England Partnership, Cambridgeshire, Essex	First Hampshire, First West, Stagecoach East
Warrington, Merseytravel, Thurrock, Nottingham City, Devon, Kent	Network Warrington, First East, Nottingham City Transport, Reading Bus, Stagecoach East Kent, Arriva South East

The programme of work enabled the team to discuss the results in detail with operators and authority staff, enabling us to rationalise the results against the local experience and expertise of industry personnel. The work also provided a great opportunity to build longer-term relationships

that will provide us with the ability to follow-up with stakeholders in areas such as how they used the BPS work to deliver benefits and improvements for passengers or evidence our work in policy and funding developments.

The main results were published and briefed to the industry on 11 March 2013 at an event supported on the day by Norman Baker MP who made the keynote speech.

#### **Looking ahead to quarter one 2013-14**

- Programme of follow-up discussions with bus operators and transport authorities to verify usefulness of BPS results and monitor progress of area/route based action plans
- Follow-up discussions with several TOCs to monitor action plan progress to tackle areas of specific performance identified through NPS

## **2. Making a difference passengers locally**

### **Transport user groups**

We held four workshops with rail and bus user groups in London, Bristol, Manchester and Newcastle. These events each included an update on Passenger Focus's current work and training on the themes of research and media presented by colleagues from the Research and Communications teams. These workshops were well supported with approximately 100 attendees in total, and we received positive feedback from many attending; 77 attendees completing feedback forms with 75 agreeing that the events were beneficial for them. Workshops have proven to be successful and useful, complementing our "Exchange" newsletter communications as a way of maintaining and effectively managing our engagement with these groups.

### **Other advocacy work with the rail industry**

Across Britain the team undertook a range of work with TOCs and other key stakeholder groups to raise and represent issues of concern to passengers seeking positive outcomes for passengers. This work can largely be grouped under the following themes:

#### Service disruption

- Discussions with Arriva Trains Wales on a range of issues including the impact on passengers of disruption to services caused by recent snowfall
- Meetings with a variety of stakeholders in Scotland to discuss ongoing improvements for passengers as part of our work on Passenger Information During Disruption (PIDD)

#### Franchise work

- Meeting with Virgin Trains on the announcement of the franchise extension to discuss passenger benefits

#### Investment

- Met with Network Rail for East Coast and West Coast Main Lines to discuss long-term utilisation of both lines

- Regular dialogue with First TransPennine Express on timetable enhancements following the introduction of new trains and infrastructure upgrades

### Passenger redress

Passenger Focus is pleased that London Midland responded positively to our recommendation of additional compensation for passengers affected by severe disruption and cancellations due to shortage of drivers in Autumn 2012.

London Midland started announcing some of the detail of this at the beginning of February through their website. We felt initially that this was not being communicated effectively to all passengers and urged London Midland to ensure that those entitled to compensation are made fully aware of it and how to apply. We were assured of their intention to do so through a communication programme including social media updates, posters and leaflets at key stations plus the potential for station and on-train announcements.

Also during the quarter the team continued a programme of ongoing **engagement** with a number of TOCs by supporting or leading work with various passenger panels, stakeholder fora and customer service initiatives. This work is valued by operators and helps Passenger Focus to maintain a regular presence with operators, stakeholders and identify and share best practices across operators.

### **3. Passenger contact** (please see section 5. below for glossary of terms)

Overview of past quarter's complaints performance and figures.

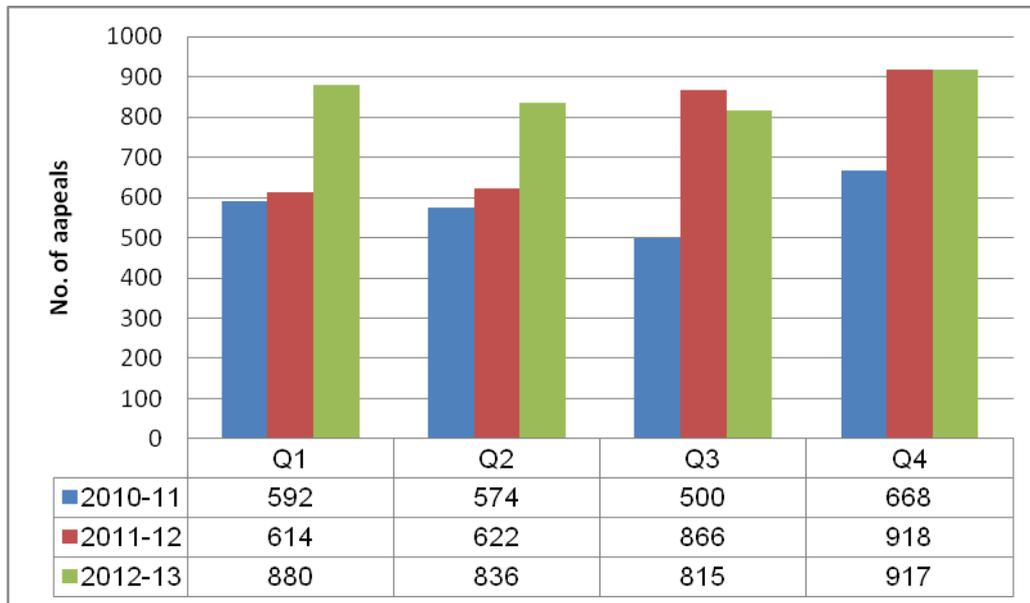
	Q4 (Jan-Mar)	Q3 (Oct-Dec)	Q2 (Jul-Sept)	Q1 (April-June)
Total appeals opened	917	815	836	880
Total appeals closed	1174	820	777	778
Bus enquiries logged	9	4	1	3
Coach enquiries logged	0	0	0	0
Tram enquiries logged	1	0	1	0
Rail enquiries opened	227	144	123	86
Rail enquiries closed	254	171	134	80
Complaint cases opened	3	2	5	4
Complaint cases closed	3	6	2	1
Praise cases logged	38	38	20	39
Re-direct cases logged (LTW)	133	107	115	100
<b>Passenger Satisfaction (target 70%)</b>	75%	75%	82%	86%
<b>Total passenger contacts</b> (email, fax, web form, letter and calls via First Call)	3406	3473	3770	3732

In quarter three, we saw an increase of **13%** in the number of appeals compared to the previous quarter. During quarter four passenger satisfaction remained above target at an average of **75%**. Giving us a year to end average of **80%**.

There has been a focus over the last 3 months to reduce our case handling times. This has steadily decreased within the quarter and in March we met the 'appeal cases closed within 35 working days' target.

Again, the number of complaints about our service remains low - with only three complaint cases opened in the quarter.

**Overview of appeal complaints opened Q1 2010-11 to Q4 2012-13:**



**TOCs generating most comments this quarter:**

	No. comments	Top comment categories
East Coast	307	Complaints Handling (102); Fares, Retailing and Refunds (54); Penalty fares/Unpaid Fares notice/prosecution (54)
Southern	137	Complaints Handling (50); Fares, Retailing and Refunds (32); Train Service Performance (23)
Northern	103	Complaints Handling (36); Train Service Performance (20); Quality on T

East Coast remains the operator generating the most comments. Comments about the TOCs complaints handling remains high, which is understandable given the nature of the appeals work.

The contacts team continue to flag up recurring themes and issues with the Passenger Issues Team, who are then able to provide guidance on the current situation as well as escalate issues within the industry to drive improvements for passengers.

**4. Other projects report**

**Open data programme**

- **Formation of Open Data Board** – a programme board was formed to oversee this programme and has subsequently met on three occasions. It is formed of key members of the Management Team with Philip Mendelsohn providing board representation
- **Open data strategy** – an organisational strategy was developed outlining our ambitions; it was published on our website in late March

- **Analysis tools** – working with mySociety, we have made good progress on developing digital analysis tools to allow increased public analysis of our National Passenger Survey (NPS) results and complaints appeal data. We recruited passengers to test the first version of our complaints tool. This gave some very interesting feedback which has been used to inform further development of the tool
- **Refining complaints data** – making our data easily understandable for public use has required us to take a fresh look at some of the processes we use for recording information. As a result we have delivered a number of small projects to improve our processes, some of which will deliver immediate results, and others will collate new information which we can analyse next financial year
- **Engaging staff** – it is vital all staff understand the reasons for open data and support our work in this field. To help facilitate this cultural shift we ran a half day workshop on Open Data at the staff away day in early March. This proved very successful and really helped to develop an appreciation amongst staff for what we are doing, and why it affects them. We plan to keep involving staff in the programme during quarter two

### **Accessibility**

We arranged a second accessibility forum in London, in addition to the groups who attended the first forum we were pleased to have people from mental health charities represented this time.

### **Changes to ticket office opening hours**

We have been consulted on changes to opening hours at station booking offices with Southern, East Midlands Trains (EMT) and Virgin Trains. Southern asked for our input on minor adjustments to staffing changes at Burgess Hill, Horley and Merstham stations, none of which we decided would significantly affect passengers. Virgin Trains have proposed major changes to the ticket buying facilities at Birmingham New Street. We have met with them to ensure that there is a clear review procedure in place after the first six months to ensure passengers are not being inconvenienced.

East Midlands Trains (EMT) consulted us on changes at Oakham and Stamford stations. After further investigation the Department for Transport (DfT) alerted us to concerns they had that these stations were not being staffed in accordance to franchise specification. We therefore objected to the proposal to reduce hours at these stations, and made clear to East Midlands Trains and DfT that the stations should be adequately staffed for at least a year before changes are considered again. DfT have since rejected EMTs application on these grounds.

### **Developing stakeholder engagement: Recording Engagement and Increasing our Reach**

The Recording Engagement project has been progressed, addressing the previously identified need to ensure our level of engagement remains appropriate for our various stakeholders. This project has involved training nominated staff to champion the correct use of our Customer Relationship (CRM) systems to record their engagement with key stakeholders. This work will be complemented by the recently begun work that forms the Increasing our Reach project. This includes work to identify and address key and important stakeholders that are missing from our database and to grow the number of stakeholders that we keep in touch with through our regular newsletters and other communications. A particular effort was made this quarter to ensure details for stakeholders identified as key were populated on CRM.

We have continued to use email to publicise our work and this quarter have successfully sent 29,056 emails. Building on the success already shown through email, we have worked with the Communications Team to re-develop Passenger Voice into a new monthly electronic newsletter. This new form allows Passenger Voice to reach many more stakeholders and passengers than before, and allows us to see exactly what articles they are reading. We have also taken this opportunity to reassert our national brands by developing the newsletter to display the Wales or Scotland Passenger Focus logo to stakeholders based in those nations.

In addition to Passenger Voice we also used email to publicise:

- National Passenger Survey results
- Bus Passenger Survey results
- Exchange (user group newsletter)

## 5. Glossary of Passenger Contact Terms

<b>Appeal complaint</b>	A complaint the operator has been unable to resolve, the passenger is seeking our help to resolve the matter
<b>Initial complaint</b>	The passenger has a complaint about their operator and has approached us in the first instance without complaining to the operator. The passengers should allow the operator the opportunity to resolve the complaint before Passenger Focus can get involved.
<b>Enquiry</b>	Any enquiry about Passenger Focus and its work, passenger rights or a general enquiry about the rail, bus, coach or tram industry
<b>Redirect</b>	A contact or complaint outside of our remit, such as for London TravelWatch or Bus Users UK
<b>Copied in</b>	The passenger has copied us in to a correspondence that they have sent to another organisation.
<b>Praise</b>	Positive feedback about Passenger Focus, its work or its complaint handling.
<b>Complaints about us</b>	Any complaint about Passenger Focus or any aspect of its work. This includes the way Passenger Focus has handled an appeal.