

Submission to Commission on Devolution in Wales: Transport in Wales

1. Introduction

1.1 Passenger Focus is the statutory watchdog for rail passengers in Great Britain; and for bus, tram and coach passengers in England (outside London). As we have no remit for bus passenger representation within Wales, our submission approaches transport in Wales from the perspective of rail travel provision.

1.2 This submission focuses on the following areas:

- i) Whether or not responsibility for the rail network in Wales including rail infrastructure and the franchising system should be fully devolved
- ii) Other aspects to help create an integrated public transport system in Wales

2. National Transport Policy

2.1 In an era of cost consciousness and efficiency it will be essential that scarce resources are focussed on the things that deliver the biggest passenger 'dividend'.

2.2 The closer that national strategy is aligned with passenger priorities the better the potential service for passengers.

3. Rail passengers' priorities and drivers of satisfaction

3.1 As part of its input into the High Level Output Specification (HLOS) process Passenger Focus commissioned research into passenger priorities for improvement. Around 4000 passengers were asked to rank 30 different aspects of rail travel¹. The work was repeated in 2009².

3.2 The table below shows the scores for Wales in 2009 and, for comparative purposes, the rankings for Great Britain as a whole.

¹ Passengers' priorities for improvements in rail services. July 2007

² Passengers' priorities for improvements in rail services. March 2010

3.3 In the 2009 research there were three clear priorities for improvement: value for money, frequency and punctuality. These, coupled with seats/capacity in fourth place, emphasise the importance passengers place on the ‘core product’.

3.4 It is also noticeable that passenger security on board trains and connections with other train services are of significantly higher importance in Wales, whilst improved security at stations and good easy connections with other forms of transport also rank higher than Great Britain.

Wales Rank 2009	Great Britain Rank	Attribute
1	1	Price of ticket offers excellent value for money
2	3	Sufficient train services at times I use the train
3	2	At least 19 out of 20 trains on time
4	4	Passengers are always able to get a seat
5	5	Company keeps passengers informed of train delays
6	12	Passengers experience a high level of security on the train
7	18	Connections with other train services are always good
8	8	Trains consistently well maintained / excellent condition
9	6	Information on train times/platforms accurate and available
10	13	Inside of the train cleaned to a high standard
11	9	Seating area of the train is very comfortable
12	14	Personal security improved through CCTV / staff at stations
13	16	All trains have staff available to help passengers
14	15	Good easy connections with other forms of transport
15	17	All train staff helpful/have a positive attitude

3.5 Well integrated transport needs combined aspects of positive security and good connections in order to be attractive to passengers, as these are key considerations when deciding whether to drive or use public transport.

3.6 Passenger Focus conducts the National Passenger Survey (NPS). We consult over 50,000 passengers a year to produce a network-wide picture of passengers’ satisfaction with rail travel.

3.7 Comparison of satisfaction with transport connections shows lower levels for journeys within Wales than for Wales-England. Whilst connections between train services are only slightly lower within Wales, when looking at connections with other forms of public transport, this difference is significant.

3.8 As shown in the table below, in the autumn 2012 wave despite improvements, satisfaction for journeys within Wales was only 67% compared with 72% for Wales-England journeys.

National Passenger Survey - Transport Connections

% saying satisfied/good

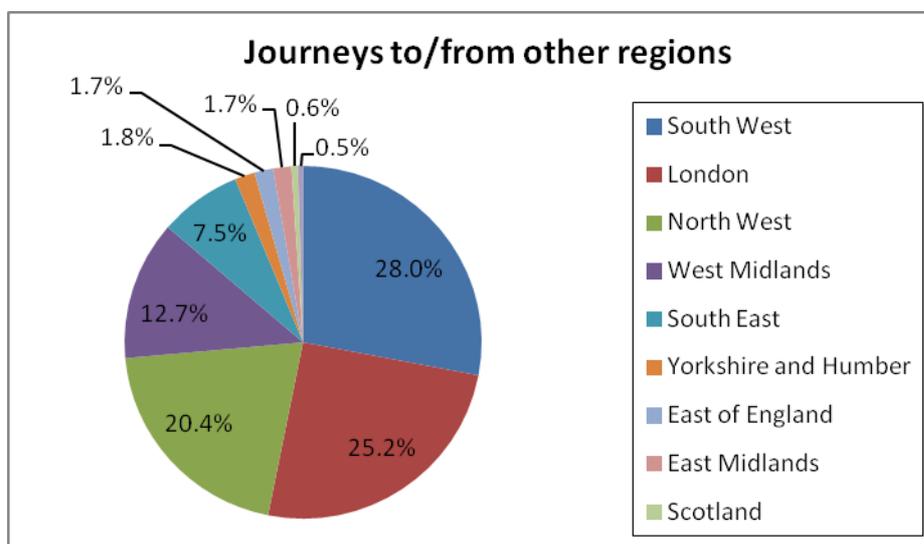
Attribute	Spring '09	Autumn '09	Spring '10	Autumn '10	Spring '11	Autumn '11	Spring '12	Autumn '12
Within Wales Journeys								
Connections with other forms of public transport	60	60	58	61	58	54	64	67
Connections with other train services	79	76	77	82	82	76	79	81
Wales-England Journeys								
Connections with other forms of public transport	76	75	76	75	72	76	73	72
Connections with other train services	80	76	77	78	73	81	78	81

4. Factors for transport integration in Wales

4.1 Good transport integration should be built on recognising the issues passengers face and improving their experience to create a positive and attractive service. These issues include:

4.2 Cross-border journeys

4.2.1 The latest figures from the Office of Rail Regulation (ORR) highlight the importance of cross-border journeys to Welsh rail users with just under one-third (31.5%) of the 27 million annual journeys that start and/or finish in Wales crossing the Wales-England border. Of this one-third (8.59m journeys), the majority are going to/coming from the South West and London



Source: National Rail Trends 2010-11
Office of Rail Regulation

4.2.2 Analysis within Wales shows that the majority of journeys into England start or finish in the Cardiff/Swansea/Newport corridor. This highlights that for Welsh rail passengers, important parts of the network are located outside of Wales and that identifying the journeys that passengers want to make is essential in establishing a robust network of local services feeding into key corridors.

4.3 Network integration

4.3.1 Passenger Focus conducted joint research with the Association of Train Operating Companies (ATOC) into the perception and reality of integrated transport³. This study aimed to gain a better understanding of the role played by integrated transport in attracting new or infrequent passengers to rail; the problems making end-to-end journeys and priorities for improvement.

4.3.2 The main barriers we found were:

- the perceived cost of the ticket
- the perceived hassle of going by train
- an assumption that the door-to-door journey (except for long-distance) would be longer
- concerns about punctuality and reliability; particularly if there would be a change of train.

4.3.3 Other factors which influence the decisions made by passengers on whether to use public transport are the availability of information, travelling comfort, security and assurance that all stages of the journey will link up⁴.

4.3.4 Our study showed that, when put to the test, most of these perceptions can be challenged. Passengers who were encouraged to try rail found that it was more reliable than envisaged, more comfortable and that, in some cases, perceptions of high cost could be overcome. Some of the ways to remove barriers are:

- providing a **good interchange** helps make the whole journey more convenient
- enabling **door-to-door journey planning** is critical if public transport is to compete with the simplicity of satnav technology
- a **frequent service** will never replace the 24/7 availability of the car but is important in encouraging people to use public transport, especially in the evening or at weekends

³ Integrated transport: perception and reality. Passenger Focus/ATOC. February 2010

⁴ Door to door by public transport – improving integration between National Rail and other public transport services in Britain, June 2009

- **demonstrating the value for money** of tickets (especially rail) can prevent non-users over-estimating how much the journey is likely to cost. We know that car users generally only count the additional petrol costs as most would not consider giving up their cars completely. There is also the multiplier effect of more than one passenger in a group meaning multiple tickets compared to one price for petrol.

4.3.5 These integration principles have been contributed to the proposals for integrated transport in South East Wales⁵:

- a core network of rail and bus services integrated together to offer the customer an improved level of service; comprising the electrified valley lines network, electrified South Wales main line and strategic regional bus routes
- The core network will be supported by a network of local connections, including local bus services and community transport services
- The network should be supported by a centralised source of planning and information which can inform users for a complete door-to-door journey and include fare and timetable information for all modes of transport
- The core network should operate at a high frequency services between these key points to support commuting demands to main centres with extended operating hours to enable the opportunity to travel by public transport at a range of times
- A single multi-modal ticketing product for the region for payment on basis of partnerships between bus and rail operators which includes the integration of fares

4.3.6 In particular, the report notes that: responsibility for transport delivery is vested in many different organisations and constitutes ‘multi-layered governance’. Although mechanisms have been put in place to align investment programmes and delivery, the systems are complex and do not fully embrace the opportunities of joint working, sharing of resources, and effective working with private partners. Support for the implementation of regional integrated transport systems may require amended governance arrangements which open up opportunities including enhancing the availability of funding.

4.4 Fares

4.4.1 Passenger Focus' research⁶ shows that passengers rate value for money as their top priority for improvement on the railway, and our National Passenger

⁵ South East Wales Integrated Transport Task Force, Proposals for the delivery of the future public transport network. March 2013

⁶ Passenger priorities for improvements in rail services. Passenger Focus.

Survey shows that only 58% of cross-border passengers are satisfied that they get value for their money.

4.4.2 Our submission⁷ on the recent consultation for the next Great Western franchise identified a number of recommendations:

- Introduce an element of flexibility in Advance Fares
- Improve access to Advance Fares
- Give passengers the information on which to make an informed purchase

4.5 Car parking

4.5.1 As Long Distance rail travel is from main-line stations and often involves an early departure and/or a late return, good car parking facilities are even more important than for local journeys.

4.5.2 Passenger Focus research⁸ has found that passengers travelling to a railway station from rural, semi-rural and edge of town locations will generally drive and park at the station. If they struggle to find a car parking space at their station they may turn their backs on the railway and drive exclusively. The NPS results show that satisfaction with car parking facilities for cross-border travel is on a par with the sector average but, at only 63%, still leaves plenty of room for improvement.

4.6 Cost and efficiency

4.6.1 Sir Roy McNulty's report on value for money in the rail sector (May 2011) contained a number of far-reaching conclusions for the rail industry and for passengers. Central to the report was a need to achieve a 30% reduction in unit cost by 2018-19 – representing a saving of around £1 billion.

4.6.2 Passenger Focus believes it is essential that the 'post-McNulty' debate does not get lost in a narrow assessment of cost. Efficiency and cost are important - they clearly have a direct impact on the range of service offered to passengers and the fares charged - but cost savings must also be set alongside the value of rail to the economy and the country as a whole. Rail enables people to get to work, acts as a catalyst of economic activity, and, just as importantly, is an environmentally friendly mode of travel. Demand for rail has soared in the last 15 years – with passenger numbers now being at levels last seen during the 1920s. If this growth is to be sustained then it will

⁷ The Great Western Franchise: A consultation response from Passenger Focus. April 2012

⁸ Getting to the station. March 2007

be essential that the benefits of rail are taken into account in any debate as well as the cost of provision.

4.6.3 The report identified cutting staff costs (which are approaching £4bn a year) as a major priority. Amongst other things it recommended a move towards Driver Only Operation (DOO) and removing regulation on ticket office opening hours – presumably as a precursor to reducing retail staff.

4.6.4 Passenger Focus's research continually emphasises the importance of staff, particularly when it comes to issues of personal security, ticketing and the provision of information.

Personal security:

- Most passengers who have expressed concern about station security attribute this to having witnessed anti-social behaviour by other people at the station and a lack of station staff. It is the same story for concerns about security on-board trains.
- Passengers consistently identify the presence of staff as important to providing reassurance to those travelling on the railway. Passenger Focus research carried out in 2011⁹ found that satisfaction with security at unstaffed stations was 9% lower than the average for staffed stations in Wales. Better lighting and CCTV were seen as key and passengers also placed a high value on being able to access real-time information via Customer Information Screens, particularly at times of disruption when passengers experience delays and cancellations.
- In terms of improving on-train security 75% of passengers believe that staff walking through the train would be effective.

Buying a ticket

- Passenger Focus research in 2008 found that many passengers queuing at ticket office window could have bought their ticket from a ticket vending machine (TVM).
- Further research in 2010 found that even some passengers who were used to buying tickets through a TVM experienced difficulty when asked to find the correct ticket for an unfamiliar journey. TVMs were often unable to provide the precise information or reassurance needed by the passenger.
- The ticket clerk will ask some basic and then offer the passenger a narrowed down range of options, navigating through the decision-making process. With TVMs on the other hand, passengers are left to work things out on their own.

Passenger information

⁹ The passenger experience at unstaffed stations, February 2011

- Staff presence at stations and on trains is considered an extremely important medium for delivering information – especially at times of unplanned disruption. Passengers express a strong desire for staff to be available on station platforms so that they can provide confirmation of the information displayed on screens, before committing to board a train. Staff are often assumed to be aware of the latest available information, and may be sought out by passengers who want updates or reassurance on whether trains are running to schedule.
- There is a very real danger that staff are seen only as a cost without considering the value they are adding. There may be scope for efficiency savings - more multi-functional staff for instance – but the debate must not simply be about cost. A visible staff presence brings real benefits to passengers which any review must also take into account.

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