Rail passenger satisfaction dips

The spring 2013 National Passenger Survey shows that satisfaction with services has fallen to 82%

Rail passenger satisfaction slipped for the second consecutive year, according to the spring 2013 installment of Passenger Focus's National Passenger Survey. Overall satisfaction with rail services was 82%, compared to 83% in spring 2012 and 84% in spring 2011.

The latest NPS score was three percentage points down on the result of the autumn 2012 survey, which reported that a record-breaking 85% of passengers considered themselves to be 'very' or 'fairly' satisfied with their journey.

During the spring 2013 period and the months leading up to it, the railway faced performance issues caused by weather, track and signalling problems, suicides and congestion on the network. However, on a positive note, cable theft became much rarer as a result of industry and police action.

Commenting on the figures, Passenger Focus chief executive Anthony Smith said: "Passengers faced variable performance in the early part of 2013. There continues to be a wide gap between the better and weaker performing services - satisfaction with individual operators ranges from 76% to 95%. Value for money by route is even more striking with satisfaction levels ranging from 17% to 76%.

"Passengers are now the main overall funder of Great Britain's railway, so it is vital that their key needs are met. Given that performance is the key factor that underpins most passengers' general view of the railway, train companies and Network Rail must keep striving to get more trains on time."

For the first, *Passenger Transport* is publishing an analysis of the performance of every train operating company featured in the survey (see pages 29-34). The analysis shows that while satisfaction remains steady for many operators, a number of larger operators, particularly in London and the South East, have seen dips since spring 2012. Of the 12 London and South East operators, eight experienced falls in passenger satisfaction. The biggest (and only significant) drop was at Govia-owned London Midland, which saw it satisfaction score plummet by seven percentage points.

The three highest scores were achieved by open access train operators: First Hull Trains (95%), Heathrow Express (94%) and Grand Central (93%). Four train operating companies shared the title of highest scoring franchise operator, with 92% satisfaction: c2c, Merseyrail, London Overground and Virgin Trains. The lowest scoring operators were First Capital Connect (76%), Northern (76%), Greater Anglia (77%), Southeastern (78%) and Southern (78%).

NEW! Passenger Focus has produced at-a-glance guides to results for GB, Wales and Scotland - passengerfocus.org.uk

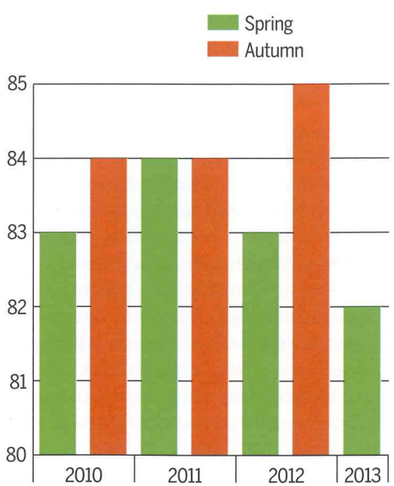
Value for money

Overall satisfaction with value for money was 42%, unchanged from spring 2012. At individual train operating companies value for money ranged from 32% (First Capital Connect) and 75% (Grand Central).

Variations in value for money by route are even more striking with satisfaction levels ranging from 17% (Stansted Express) to 76% (on Grand Central's London-Bradford route).

OVERALL RAIL PASSENGER SATISFACTION (%)

Source: NPS data, Passenger Focus



Punctuality/reliability

Punctuality/reliability is by far the biggest driver of overall satisfaction, and it appears to have had a big influence in the decline in overall satisfaction in the spring 2013 survey.

Of the 30-plus aspects of train services covered by the survey, punctuality/reliability saw the biggest drop in satisfaction - falling three percentage points to 78%.

At individual train operating companies, satisfaction with punctuality/reliability ranged from 70% (London Midland) to 95% (Heathrow Express). The biggest drop was experienced at Heathrow Connect (14 percentage points), followed by London Midland (12 percentage points). There were falls of six percentage points at CrossCountry, First TransPennine Express, Northern Rail and Southern.

Sufficient room to sit and stand

Two thirds of passengers (67%) were satisfied with 'sufficient room for all passengers to sit/stand', down two percentage points on spring 2012. However, there were much bigger declines at individual train operating companies. The biggest drop was at Stagecoach's South West Trains, where satisfaction with room to sit/stand plunged 10 percentage points to 63%.

Other aspects of the service

There were significant year-on-year drops (of two percentage points) in satisfaction with train frequency, the space for luggage and the cleanliness inside and outside trains.

However, there were also a number of aspects of the service that saw significant improvements such as station facilities and services (up five percentage points) and station cleanliness (up three percentage points). ■

SURVEYING PASSENGERS

Passenger Focus also carries out an annual Bus Passenger Survey and this year it has completed a pilot Tram Passenger Survey

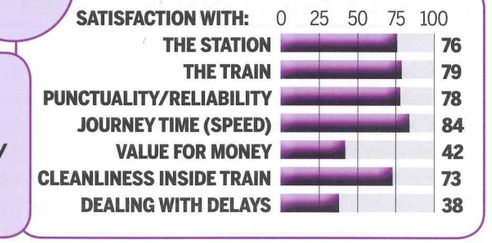
National total - all TOCs

82%

Overall satisfaction (change since Spring 2012 = -1%)

Overall passenger satisfaction dropped again, following last year's fall. At 82%, it was down on the 83% achieved in sping 2012 and 84% in spring 2011. The were some significant increases in some aspects of satisfaction with stations, including upkeep and repair, cleanliness, facilities and services and car parking facilities. However, there were significant declines in satisfaction with train frequency, punctuality/reliability, upkeep and repair of trains, space for luggage, room to stand/stand and the cleanliness of trains.

Punctuality/reliability: -3%



=22. First Capital Connect

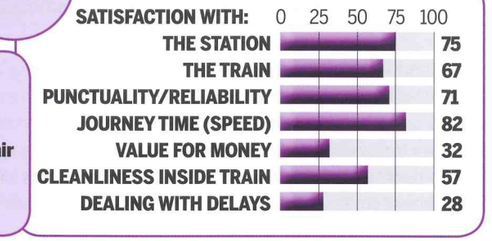
OWNING GROUP: FirstGroup **FRANCHISE ENDS:** September 2014

76%

Overall satisfaction (change since Spring 2012 = -3%)

Passenger Focus acknowledged FCC's descent to the bottom of the NPS table is likely to be due to infrastructure failures, which caused a significant number of cancellations over 10 days. FCC's latest research shows satisfaction is now around previous levels at 80%. However, the company has long been in the lower echelons. It is attempting to address communication and infrastructure issues in new initiatives with Network Rail and has promised improvements to train interiors.

Upkeep/repair of the train -6%



=22. Northern Rail

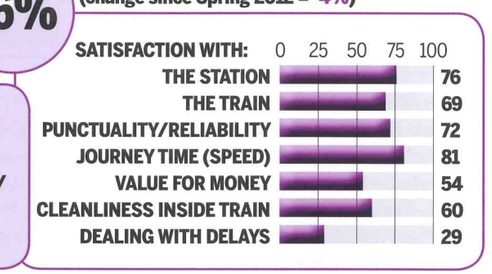
OWNING GROUP: Abellio/Serco **FRANCHISE ENDS:** February 2016

76%

Overall satisfaction (change since Spring 2012 = -4%)

It's hard not to sympathise with Northern, given its ageing fleet, vast franchise and lack of DfT investment. The company is generally recognised as making a good fist of its task and satisfaction rose to 83% in the early years. The impact of weather on performance explains some of the ongoing fall in satisfaction. Nonetheless, NPS scores for some factors within Northern's control remain low. The franchise needs modernising, and perhaps breaking up.

Punctuality/reliability: -6%



21. Greater Anglia

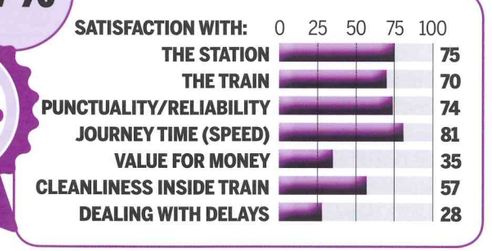
OWNING GROUP: Abellio **FRANCHISE ENDS:** October 2016

77%

Overall satisfaction (change since Spring 2012 = +4%)

Since taking over from National Express in February 2012, Abellio has formed a successful partnership with Network Rail, raising the franchise's punctuality from the doldrums to record levels. The spring NPS also shows significant improvements in satisfaction in areas including value for money and information during the journey. However, Greater Anglia acknowledges that it was starting from a low base. It will need to deliver prolonged improvements to reach mid-table.

MOST IMPROVED



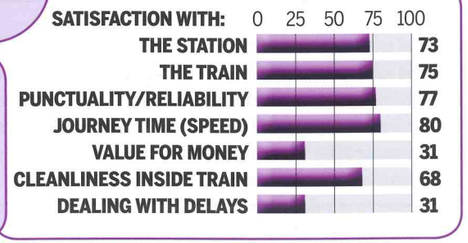
=19. Southeastern

OWNING GROUP: Govia **FRANCHISE ENDS:** June 2018

Southeastern recorded best ever annual punctuality of 91.6% 18 months ago. It has maintained those standards apart from weather-affected months at the end of 2012 and the beginning of 2013. That led to satisfaction falling considerably in the spring survey. NPS scores for punctuality and overall were comparable to those at sister company Southern despite much lower punctuality at the neighbouring TOC. Satisfaction with Highspeed services remained high at 92%.

78% Overall satisfaction (change since Spring 2012 = -3%)

Punctuality/ reliability: -3%



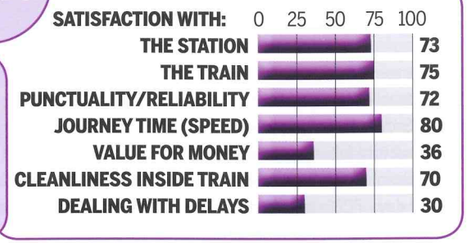
=19. Southern

OWNING GROUP: Govia **FRANCHISE ENDS:** September 2014

Southern's overall NPS score has been falling for three years from 84% in 2010, as infrastructure issues have seen punctuality decline from over 90% to below 88%. Performance improvement programmes with Network Rail are underway. However, satisfaction with other aspects of service have also fallen considerably. The spring NPS suggests Southern has addressed some problems, but satisfaction remains low in areas like staff attitude, train upkeep and dealing with delays.

78% Overall satisfaction (change since Spring 2012 = -2%)

Punctuality/ reliability: -6%



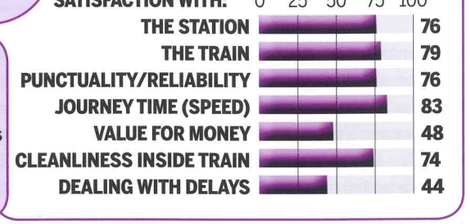
=17. First Great Western

OWNING GROUP: FirstGroup **FRANCHISE ENDS:** July 2016

FGW is near the bottom of the NPS tables on all three of its service types. Among intercity services into London, only Greater Anglia Norwich-London scores are lower (81%) than FGW's 85%. Thames Valley commuter services have low overall satisfaction of 79% and 75% of passengers are satisfied with rural West of England services, below Northern's average at the bottom of the regional table. However, there was significant improvement in several station scores.

80% Overall satisfaction (change since Spring 2012 = -2%)

Station facilities and services +4%



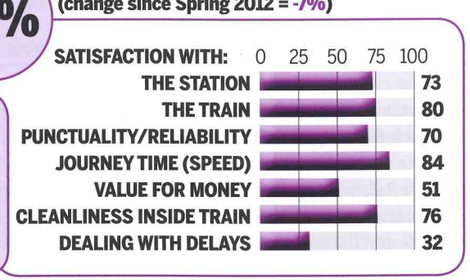
=17. London Midland

OWNING GROUP: Govia **FRANCHISE ENDS:** June 2017

No surprise London Midland got pinged by passengers. Driver shortages saw 1,000 trains cancelled from mid-October to early December, with low punctuality continuing in early 2013. Its own errors were compounded by NR delays rising 28.5% in 2012/13. Satisfaction with punctuality fell from 82% to 70%, the lowest in the survey; for dealing with delays it fell from 49% to 32%. Passengers took out their frustration marking the TOC down significantly in 16 of 35 NPS categories.

80% Overall satisfaction (change since Spring 2012 = -7%)

How delays are dealt with: -17%



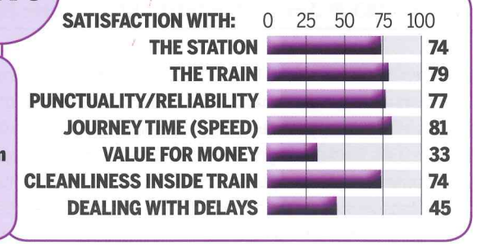
16. South West Trains

OWNING GROUP: Stagecoach **FRANCHISE ENDS:** April 2019

SWT remains top TOC south of the Thames, but overall satisfaction has fallen steadily from 87% in 2010, mirroring a decline in punctuality from touching 94% to 91.7%. SWT claims the downward trend has been inevitable given continual increases in use on a network at the limits of its capacity. The spring NPS saw significant declines in various scores for comfort on trains as well as for punctuality. The remodelling of Waterloo can't come soon enough.

81% Overall satisfaction (change since Spring 2012 = -3%)

Sufficient room to sit/stand -10%



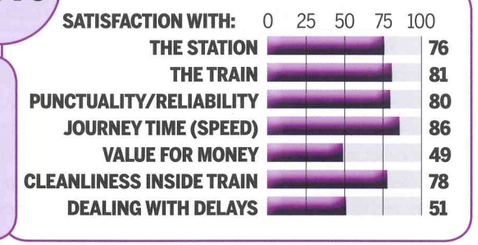
15. CrossCountry

OWNING GROUP: Arriva **FRANCHISE ENDS:** November 2019

CrossCountry's satisfaction varies from 88% on Birmingham-Manchester services to 81% on Birmingham-South West. Unusually, its leading Birmingham-Manchester service only has a middling score for punctuality among its six routes - value for money is where passengers rate it. Overall, CrossCountry has the lowest satisfaction in the long distance category (bar London-Norwich). Results reveal dissatisfaction with crowding.

84% Overall satisfaction (change since Spring 2012 = 0%)

Ticket buying facilities +7%



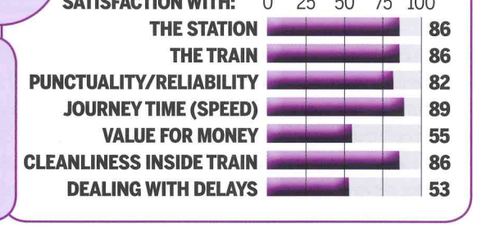
14. TransPennine Express

OWNING GROUP: FirstGroup/Keolis **FRANCHISE ENDS:** February 2016

TransPennine's crowding issues mean a 65% satisfaction score for ease of getting a seat - the lowest among long distance TOCs. It is also a different type of long distance service and satisfaction with punctuality is out of sync, given that 92% of trains are on time. Perhaps these factors explain why it has achieved only a mid-table position, among long distance operators and overall. Additional trains coming into service next year are likely to produce a change.

85% Overall satisfaction (change since Spring 2012 = -2%)

Punctuality/ reliability: -6%



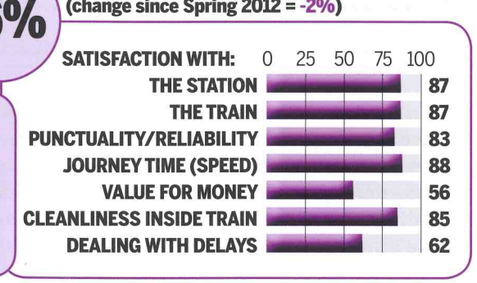
13. East Coast

OWNING GROUP: DOR **FRANCHISE ENDS:** February 2015

A greater fall in satisfaction may have been expected given punctuality was mid-70% for four months at the end of 2012 and start of 2013. Regardless, NPS scores with what should be a flagship service are a moderate advert at best for the company and Network Rail. Customer service and brand building could be expected to improve NPS scores after a return to the private sector. Exceptional improvement in station satisfaction is due to the new Kings Cross concourse.

86% Overall satisfaction (change since Spring 2012 = -2%)

Overall station environment +16%



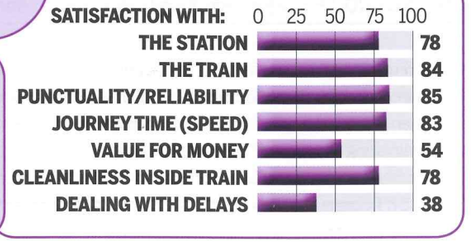
=11. Arriva Trains Wales

OWNING GROUP: Arriva **FRANCHISE ENDS:** October 2018

Arriva's position is reward for improving punctuality dramatically and then consistently sustaining it above 93%. On the Valley Lines where punctuality is above 95%, overall satisfaction is 90%. Almost all NPS scores for stations have been on a continual upward curve. As the fleet remains a mix of ageing Pacers and DMUs, dealing with delays appears the only major factor within Arriva's control where significant improvements in satisfaction could realistically be expected now.

88% Overall satisfaction (change since Spring 2012 = 0%)

Availability of station staff **+8%**



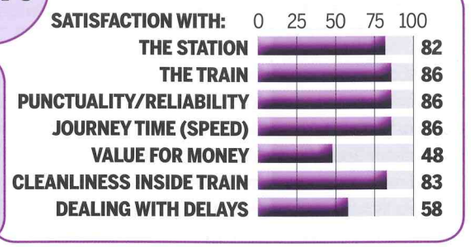
=11. East Midlands Trains

OWNING GROUP: Stagecoach **FRANCHISE ENDS:** October 2017

East Midlands's overall satisfaction score appears a little lower than might be expected. It has comfortably the best punctuality in the long distance sector, regional performance is strong, and its score for dealing with delays improved significantly in the spring NPS. However, satisfaction with regional stations, value for money and journey time are middle of the road. Quicker long distance services and improvements to Nottingham station over the next year may take scores higher.

88% Overall satisfaction (change since Spring 2012 = +1%)

How delays are dealt with: **+7%**



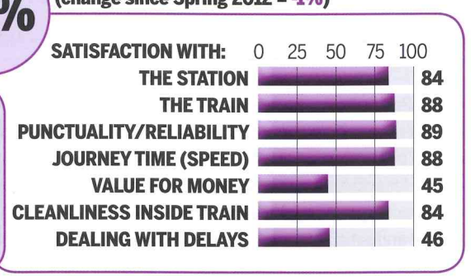
10. Chiltern Railways

OWNING GROUP: Arriva **FRANCHISE ENDS:** December 2021

Despite a slight drop in overall satisfaction, all round performance is exceptional. Chiltern leads the London commuter satisfaction scores for trains and is second only to c2c for punctuality and stations. Emphasis on customer service over many years is evident in high scores for a range of staff, station and train environment factors. Dealing with delays is the weakest link at 46% satisfaction, but here too Chiltern is second in the London commuter market.

89% Overall satisfaction (change since Spring 2012 = -1%)

How delays are dealt with: **+8%**



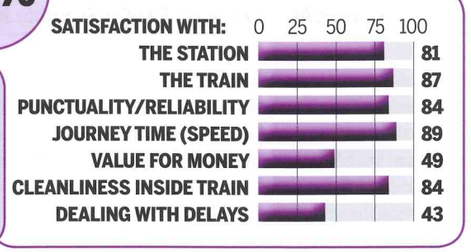
9. ScotRail

OWNING GROUP: FirstGroup **FRANCHISE ENDS:** March 2015

First may not quite have achieved the same heights of punctual performance as Arriva in Wales, but the all round quality of its service, assisted by support and investment from the Scottish government, has put it in top spot among the major regional operators. However, there is a clear difference between NPS scores in the Glasgow area and elsewhere. Satisfaction with Strathclyde services is 92%, other urban services 85% and interurban services 86%.

90% Overall satisfaction (change since Spring 2012 = +1%)

How delays are dealt with: **+8%**



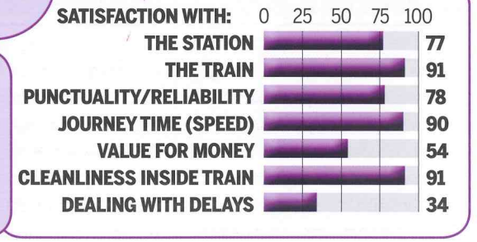
8. Heathrow Connect

OWNING GROUP: Heathrow Airport/FirstGroup **FRANCHISE ENDS:** n/a

As a dedicated short-hop stopping service to the airport from Paddington, Heathrow Connect should be straightforward to run and achieve high levels of satisfaction. However, it experienced significant disruption prior to the spring NPS. Satisfaction with punctuality fell from 92% to 78%. In difficult circumstances, passengers do not appear to have been impressed with the response from the Heathrow Airport/First Great Western joint venture.

91% Overall satisfaction (change since Spring 2012 = -3%)

Availability of station staff **-14%**



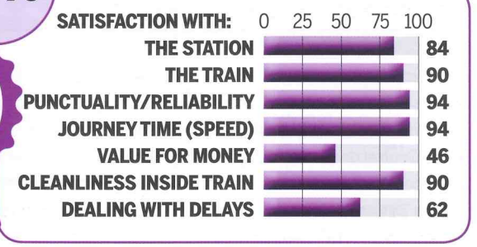
=4. c2c

OWNING GROUP: National Express **FRANCHISE ENDS:** September 2014

It is not just c2c's table-topping 97% punctuality that is impressing passengers but all round performance. As well as industry-leading satisfaction with punctuality, it had the best NPS score among London commuter operators in 16 of the 35 NPS categories, including quality of stations and helpfulness of station staff. c2c may not be the best in terms of right time punctuality. In fact it is fourth, but passengers seem more influenced by the 97% PPM measure.

92% Overall satisfaction (change since Spring 2012 = +1%)

BEST London & South East operator



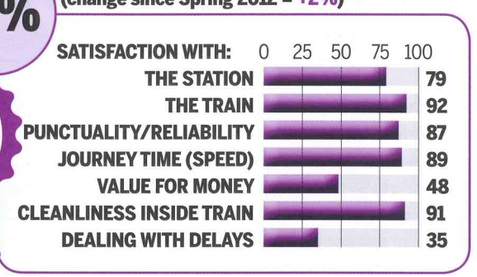
=4. London Overground

OWNING GROUP: Arriva/MTR **FRANCHISE ENDS:** November 2016

The impact of investment in trains, stations, ticketing and management resources took London Overground to joint first place among franchised/concession operators in the spring NPS, underpinned by punctuality of over 96%. However, there are a number of areas with relatively low satisfaction scores. They include several issues with stations which resulted in overall satisfaction with stations of 79%. Only 35% were satisfied with how the few delays that occur are dealt with.

92% Overall satisfaction (change since Spring 2012 = +2%)

BEST London & South East operator



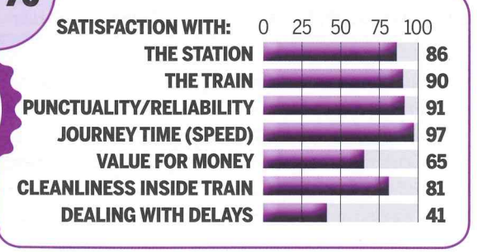
=4. Merseyrail

OWNING GROUP: Abellio/Serco **FRANCHISE ENDS:** July 2018

Merseyrail remained the leading franchise/concession operator in the spring NPS, albeit now occupying joint top spot. It is hard to discern why satisfaction overall and with punctuality fell as seasonal weather had a relatively light impact on performance which was virtually unchanged on the previous year. In addition, improvements to underground stations saw scores rise significantly in several NPS categories. Merseyrail has 65% satisfaction with value for money.

92% Overall satisfaction (change since Spring 2012 = -3%)

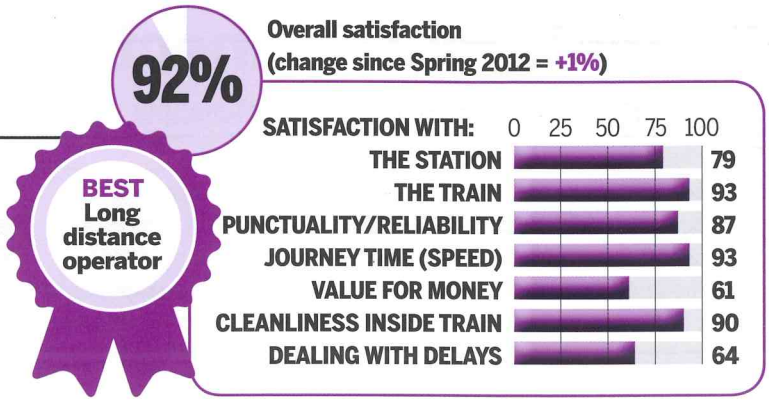
BEST Regional operator



=4. Virgin Trains

OWNING GROUP: Virgin/Stagecoach **FRANCHISE ENDS:** April 2017

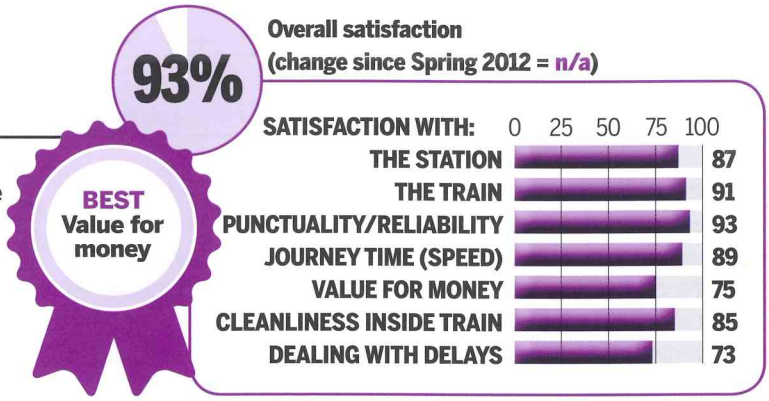
On the face of it Virgin has no right to its lofty position given its bottom of the table punctuality. To increase satisfaction after months of dreadful performance due to weather conditions and infrastructure failures is remarkable. Virgin deals with delays well. A 64% score is the highest among franchised operators. But how it achieves 87% satisfaction for punctuality is a mystery. Brand power and public support after the refranchising fiasco must come into it.



3. Grand Central

OWNING GROUP: Arriva **FRANCHISE ENDS:** n/a

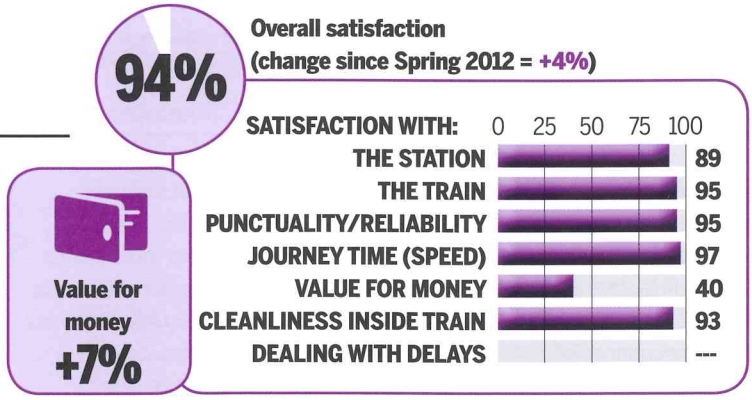
The emphasis open access operators place on customer care is evident in satisfaction with how Grand Central deals with delays. Its 73% score is the best in the industry as is its 75% value for money rating. High scores for staff and information also illustrate the service ethos. Like fellow open access operator First Hull Trains, punctuality is slightly lower than competing East Coast's, but satisfaction with punctuality is much higher. Perhaps perceptions are influenced by customer service.



2. Heathrow Express

OWNING GROUP: Heathrow Airport **FRANCHISE ENDS:** n/a

The premium fare, non-stop Paddington-Heathrow service improved its satisfaction rating from 90% to 94%. Significant improvements were recorded for a number of soft service issues such as the cleanliness of stations, availability of station staff and the condition of trains. Industry leading scores were recorded in areas including punctuality, the train and journey time. However, the £20 fare for a 15-minute journey meant satisfaction with value for money was just 40%.



1. First Hull Trains

OWNING GROUP: FirstGroup **FRANCHISE ENDS:** n/a

The quality of service delivered by small market-focused companies is evident throughout the NPS rankings and typified by Hull Trains which was the leading operator in the spring survey. Station ratings suggest it benefited considerably from the new Kings Cross concourse, but factors within its control have uniformly high scores. Only Virgin scores higher for its trains. Information during the journey (90%) and train staff (94%) are among the NPS categories where Hull Trains leads.