Submission to Welsh Government: National Transport Plan 2015 – Draft

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). Our mission is to get the best deal for passengers. With a strong emphasis on evidence-based campaigning and research, we ensure that we know what is happening on the ground. We use our knowledge to influence decisions on behalf of passengers and we work with the industry, passenger groups and government to secure journey improvements.

1.2 In line with our remit focussing on rail passenger representation in Wales, this submission focuses on the following areas:

- Passenger experiences of rail services in Wales
- Passenger priorities for improvements
- Development and delivery of future rail services
- Value for money and connectivity
- Passenger trust

1.3 We also include points from the Bus Passenger Survey conducted in Wales in 2010.

2. Passenger experience

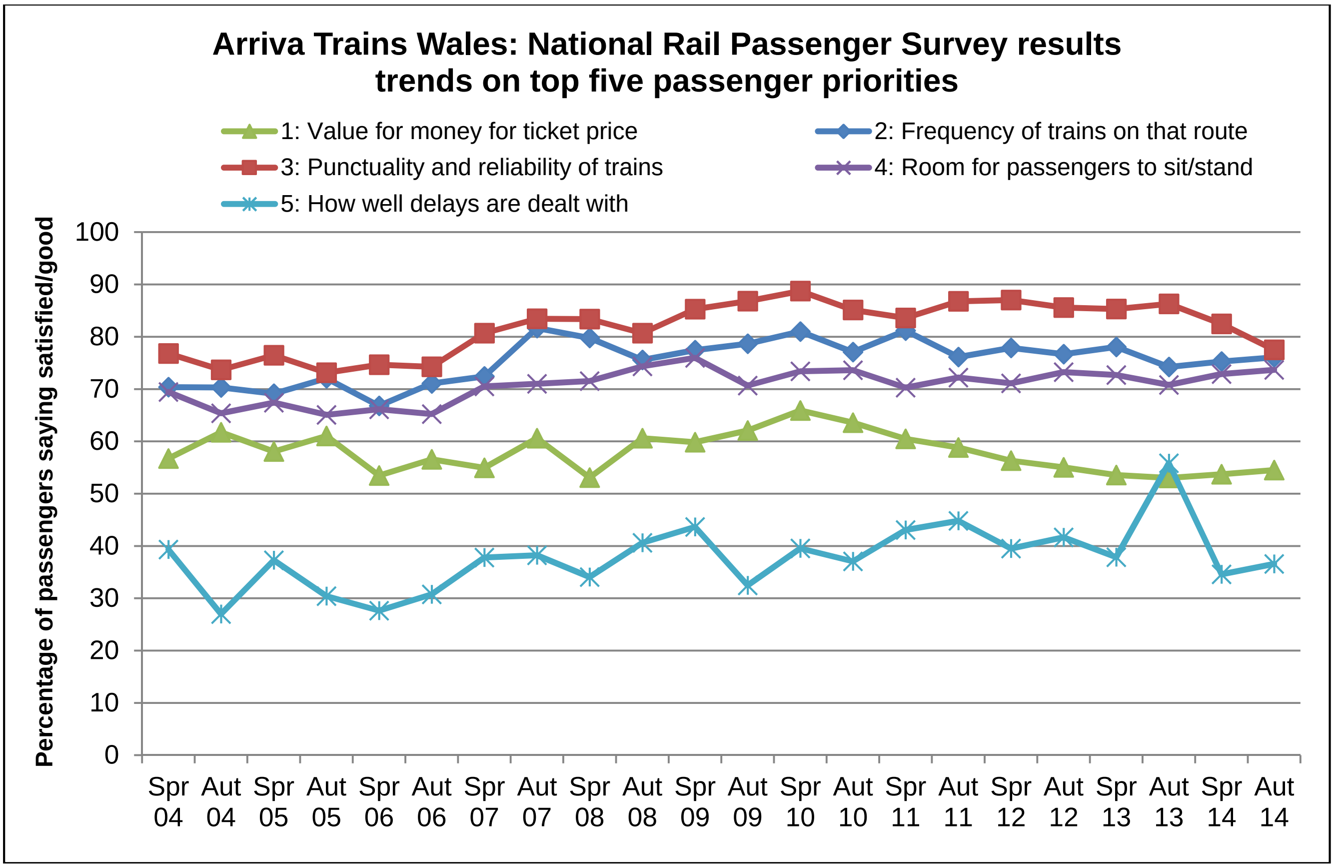
2.1 Passenger Focus conducts the National Rail Passenger Survey (NRPS). We consult over 50,000 passengers a year to produce a network-wide picture of passengers' satisfaction with rail travel.

2.2 Our research shows that passengers tend to be focused on the outputs that matter to them – the value for money for their ticket, how frequent and punctual their service is, how many seats are available and whether they are kept informed when there are delays.

2.3 Analysis of NRPS shows that punctuality is the biggest single driver of satisfaction while managing delays is the biggest single driver of dissatisfaction.

2.4 Arriva Trains Wales (ATW) took over the Wales and Borders franchise in the autumn of 2003. NRPS data has been tracking passenger satisfaction in two waves each year and the trends for these key factors over the operating period of this franchise is shown in the chart below.

2.5 The low level of satisfaction with managing delays together with the decline in punctuality are key aspects of concern. We would recommend interventions to improve performance and passenger experience. Together, these will have a significant direct impact on increasing passenger satisfaction with service provision.

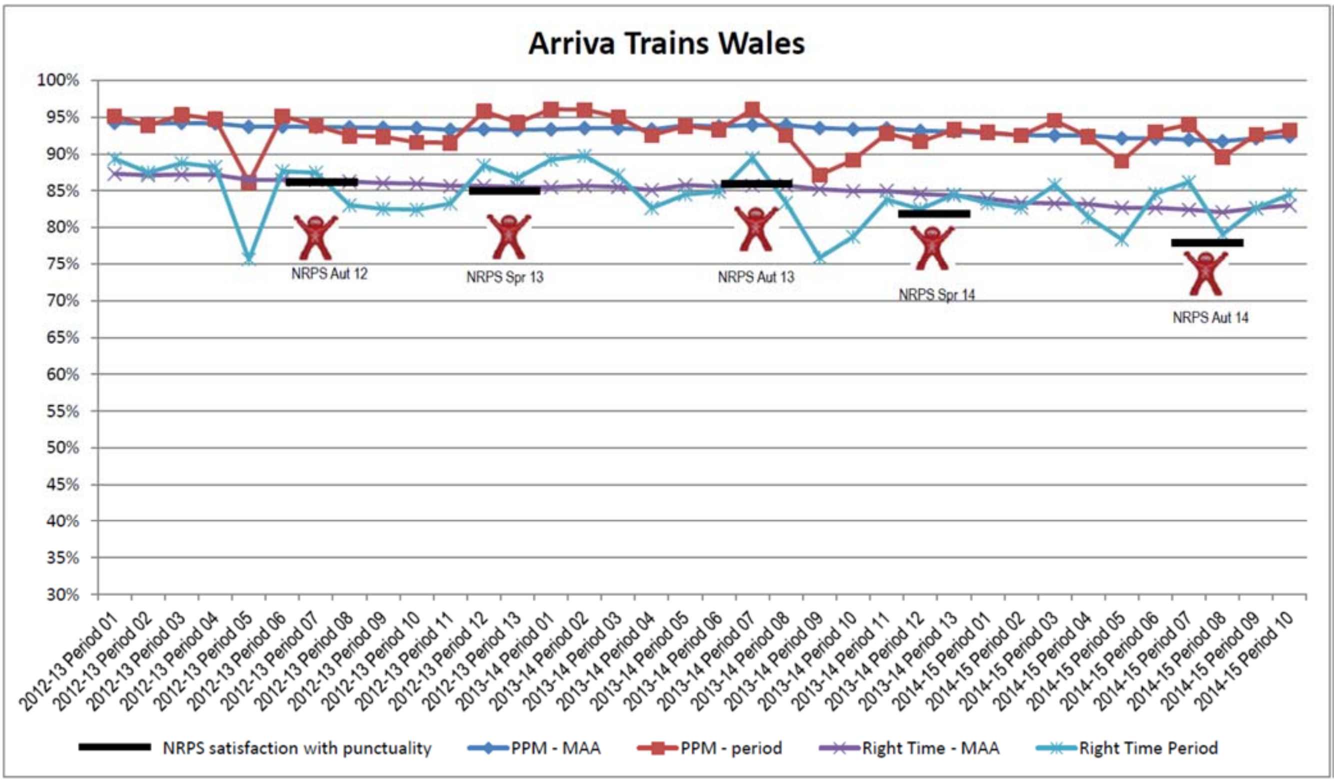


Right time

2.6 Work to explore in detail the correlation between passenger satisfaction with punctuality, as measured by NRPS, and actual train performance for a three to four year period found:

- Average lateness experienced by passengers is worse than that recorded for train services. This is because of the effect of cancellations and because many trains that are on time at their destination are late at intermediate stations.
- On average, passenger satisfaction with punctuality reduces by between two and three percentage points with every minute of delay.
- Commuters (except those travelling long distances) notice lateness after one minute of delay, not just after the five or ten minutes allowed by PPM. Their satisfaction with punctuality falls by an average of five percentage points per minute during the initial period of delay
- Business and leisure users and long distance commuters tend to change their level of satisfaction with punctuality after a delay of four to six minutes

2.7 The effect of performance on passenger satisfaction can be clearly demonstrated by mapping passenger satisfaction with punctuality from each NRPS wave against the trends for PPM and right time. As the chart below shows, passenger satisfaction more closely reflects their experience of right time performance.



2.8 This evidence confirms that PPM does not fully reflect passengers' own experience of delays. We recommend managing (and publishing) right-time rather than PPM performance, as this is more likely to provide bigger and more noticeable improvements to satisfaction.

Passenger satisfaction

2.9 The NRPS results for ATW in Autumn 2014 include a split of passenger satisfaction scores by main route groupings: Cardiff and Valleys, Inter-urban, Mid Wales and Borders, North Wales and Borders, South Wales and Borders/West Wales. The table of this split can be seen in Appendix A, in comparison with the average for the regional sector (i.e. the average for similar operators).

2.10 Satisfaction with a number of station factors are noticeably below the sector average; particularly the upkeep and repair of stations, cleanliness, facilities and seating. Also for connections with other public transport. It is also concerning to see that the majority of station factors for routes in North Wales and Borders and Mid-Wales and Borders are well below the sector average. However it is encouraging to see very positive scores for station staff and higher than average satisfaction on a number of factors from passengers on inter-urban routes.

2.11 Satisfaction with the actual train journey tends to be higher than the sector average particularly for toilets and staff availability/helpfulness, also for on-board information, security, cleanliness and upkeep of trains. It is noticeable, however, that satisfaction with frequency of services and punctuality are lower on a number of routes and that a considerable number of train service factors are below sector average for the Cardiff and Valleys routes, giving them the poorest set of scores from passengers.

2.12 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'. Passenger Focus has a wealth of data on passenger priorities and drivers of satisfaction – key research reports are listed in Appendix B. This work continually emphasises the importance of the 'core product' – a punctual, reliable, affordable railway on which you can get a seat. For us a key part of the passenger test is whether service development and future proposals will result in improvements in these areas.

3. Passenger priorities for improvement

A national study of passenger priorities[1] shows that the top three requirements of passengers in Wales directly reflect those of the Great Britain sample overall.

Rail passengers' priorities for improvement - Comparison of Wales and Great Britain

	Wales		Great Britain	
Factor	**Rank**	**Index**	**Rank**	**Index**
Price of train tickets offers better value for money	1	**458**	1	**494**
Passengers always able to get a seat on the train	2	**402**	2	**367**
Trains sufficiently frequent at the times I wish to travel	3	**238**	3	**264**
Train company keeps passengers informed about delays	4	**168**	5	**163**
More trains arrive on time than happens now	5	**150**	4	**178**
Accurate and timely information available at stations	6	**140**	8	**132**
Less frequent major unplanned disruptions to your journey	7	**133**	6	**161**
Fewer trains cancelled than happens now	8	**116**	7	**136**
Well-maintained, clean toilet facilities on every train	9	**106**	14	**89**
Inside of train is maintained and cleaned to a high standard	10	**106**	11	**93**
Free Wi-Fi available on the train	11	**97**	10	**97**
Accurate and timely information provided on trains	12	**97**	12	**92**
Connections with other train services are always good	13	**95**	15	**84**
Journey time is reduced	14	**84**	9	**105**
Less disruption due to engineering works	15	**76**	13	**90**
Good connections with other public transport at stations	16	**71**	16	**62**
Seating area on train is very comfortable	17	**67**	17	**59**
Train staff have a positive, helpful attitude	18	**54**	18	**47**
Station staff have a positive, helpful attitude	19	**53**	19	**46**
New ticket formats available such as smartcards, ticket Apps, print at home	20	**49**	20	**45**
Sufficient space on train for passengers' luggage	21	**47**	23	**37**
Improved personal security on the train	22	**45**	21	**41**
Improved personal security at the station	23	**42**	22	**38**
Stations maintained and cleaned to a high standard	24	**41**	24	**36**
More staff available at stations to help passengers	25	**33**	25	**29**
There is always space in the station car park	26	**31**	26	**27**
Free Wi-Fi available at the station	27	**25**	27	**24**
More staff available on trains to help passengers	28	**23**	28	**20**
Reduced queuing time when buying a ticket	29	**21**	29	**20**
Access from station entrance to boarding train is step-free	30	**18**	30	**15**
Safe and secure bicycle parking available at the station	31	**12**	31	**10**

[1] http://www.passengerfocus.org.uk/research/publications/rail-passengers-priorities-for-improvements-october-2014

3.1 The priorities in the table above are shown as an index averaged on 100. An index of 300 is three times as important as the average and an index score of 50 is half as important as average. So we can see that, for passengers in Wales, the top priority of 'the price of train tickets offers better value for money' is over four and a half times more important than the average, with 'passengers always able to get a seat on the train' at four times more important than the average.

3.2 This research provides a very clear picture of passengers' priorities for improvement. The two top priorities, by some considerable margin, are 'price of train tickets offers better value for money' and 'passengers always able to get a seat on the train'.

3.3 The strong third priority for improvement, indexed at 238, is 'trains sufficiently frequent at the times I wish to travel'.

3.4 The next group of important priority factors also feature what can be regarded as core elements of service. Passengers want good information about their services, improvements in punctuality and reliability, fewer disruptions and well-maintained toilets and trains. All top ten priorities rank above the average 100 index.

4. Developing future rail services

4.1 Based on NRPS and the priorities for improvement research we can readily identify the core factors that matter to passengers. These should be kept firmly in mind as developments take place for future franchise proposals.

4.2 Passengers want a franchise that will deliver:

- value for money for the price of tickets
- a punctual and reliable service
- provision of sufficient capacity, both in terms of frequency of service and sufficient seating on the train
- effective management of any disruption, especially through information to passengers
- accurate information about trains and platforms
- well-maintained trains and toilets.

Passenger engagement

4.3 Passengers feel detached from the franchise process and many would like opportunity for greater engagement. This agenda should encompass:

- passengers should know when a franchise renewal is coming up and have an opportunity to feed in their views
- when a franchise is let there should be a clear statement setting out what is being purchased for them
- passengers should have a role in monitoring franchise delivery

Passenger accountability

4.4 We believe it is important that the operator and the specifier of a service are accountable to the users of that service. To us this doesn't just mean 'democratic accountability' but also 'passenger accountability'. It will be important that the specifier and the operator set out how they intend to gather the views of passengers on the services being provided. Traditional 'hard' measures on delays, cancellations and crowding are important but so is the quality of service being provided. On the latter our strong preference is for targets based on what passengers think – the best judge of quality being those who have used the services in question.

Transparency

4.5 We wish to see far greater transparency of information that is relevant to passenger experience. Giving rail passengers access to performance figures relevant to their services will help them to hold the train company to account and to ask what is being done to improve services in return for the fares they pay. Good management should not feel threatened by this. Indeed the availability of accurate data may actually help them – a particularly bad journey can linger in the memory and distort passengers' perceptions. Accurate, relevant data can help challenge these negative perceptions and focus management attention on areas that need improving. Hence, at the very least, we believe there is a case for providing performance data at a disaggregated route level.

More generally, we recommend adoption of an increasingly open approach to making data and information about all aspects of rail service provision available in the public domain.

Capacity/crowding

4.6 There is also scope for greater transparency surrounding capacity/crowding. The Office of Rail Regulation has conducted research[2] looking at the impact of publishing more information on train seat availability which found that passengers not only wanted more information but also acted upon it when planning their journeys. We advocate increasing the availability of information about the relative capacity of peak and shoulder-peak trains to enable those passengers who can adapt their travel patterns to be able to make informed choices.

Performance

4.7 We recommend that operational focus on 'right-time' arrival at all stops is made a core requirement of the new franchise, together with a requirement for publication of detailed performance information which will inevitably act as a catalyst to improvement:

- Challenging but achievable PPM targets for the franchise as a whole and key service groups
- Disaggregated punctuality, with passengers able to identify performance of individual trains
- Moves towards a 'right-time' railway, with a requirement to report performance of trains arriving at key intermediate stations.

[2] http://orr.gov.uk/__data/assets/pdf_file/0016/4804/swt-crowding-data-research.pdf

Dealing with disruption and provision of information

4.8 'How the train company deals with delays' is, by far and away, the biggest driver of passenger dissatisfaction. Passenger Focus has been working with ATW to review performance, with very positive outcomes. We recommend building on this by incorporating key objectives:

- Contractual targets to improve NRPS satisfaction with the provision of information during the journey and a strategy developed and implemented to improve NRPS scores for "how well the train company dealt with delay" and "usefulness of information during a delay."
- A facility for passenger emails or text alerts, warning of likely disruption, with an associated requirement to achieve a strong level of uptake
- Full adoption of the Association of Train Operating Companies' (*ATOC) Approved Code of Practice: passenger information during disruption* and compliance with the Good Practice Guides on provision of passenger information, together with a programme of audit and mystery shopping to assess delivery on the ground.

4.9 Further recommendations were published along with our latest findings in September 2014 in our report: Passenger information when trains are disrupted[3].

5. Value for money and connectivity

Fares and value for money

5.1 Passenger Focus has conducted extensive research with passengers on fares, ticketing and value for money and has identified many issues that remain to be adequately addressed. We would be pleased to explore this topic in further detail.

5.2 Whilst 'smart' technology will enable an enhanced offer of ticketing products and services, there is a wider agenda about fares, retailing and revenue protection that must be considered within the franchise. However, the revenue protection strategy must provide safeguards for those who make an innocent mistake and whose intention was never to defraud the system.

Smart ticketing

5.3 Our research[4] shows that rail passengers essentially want something that makes it easier to travel, with more flexibility, but also cheaper, offering a discount and additional products such as carnets. This needs to be delivered in an easy format, either as a single card or on a mobile. Passengers have concerns about security of data and what happens at the ticket gate, so want staff to be available to help them use it. This also highlights seven principles of smart ticketing: value for money, convenience, simplicity, security, flexibility, tailored to their needs and using leading-edge concepts and technology.

5.4 Smart ticketing – mobile applications[5] explores what works well and what doesn't with regard to delivering services through mobile apps. It is essential that smart ticketing schemes are well designed, properly implemented and clearly communicated.

[3] http://www.passengerfocus.org.uk/research/publications/passenger-information-when-trains-are-disrupted
[4] http://www.passengerfocus.org.uk/research/publications/smart-ticketing-what-rail-passengers-want-july-2013
[5] http://www.passengerfocus.org.uk/research/publications/smart-ticketing-mobile-applications

Connectivity

5.5 Proposals will also need to set out the degree of interaction with the rest of the rail network. Passengers value the concept of a network and a seamless delivery of service. Proposals will need to show that it is still easy to make a journey from one area to another – the seamless journey must not acquire any rough edges.

Network integration

5.6 Passenger Focus conducted joint research with the Association of Train Operating Companies (ATOC) into the perception and reality of integrated transport[6]. 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. 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.

5.7 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 up[7].

Modal integration at the rail station

5.8 Train stations can, in many instances, become local transport hubs. The development of the Station Travel Plan initiative is a good way of looking at how passengers get to the station and in identifying improvements. Key amongst these are bus links (in particular the timing of connections), cycle routes and secure storage at the station, and safe walking routes.

5.9 We also believe that car parking is an important part of integration plans, especially for long distance travel from main-line stations. As this involves an early departure and/or a late return, good car parking facilities can be even more important than for local journeys.

5.10 Passenger Focus research[8] 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 NRPS 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.

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[6] Integrated transport: perception and reality. Passenger Focus/ATOC. February 2010

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

[8] Getting to the station. March 2007

6. Passenger trust

6.1 Each year we measure passengers' satisfaction with their individual rail journeys. We wanted to understand why this can differ from passengers' overall perception of the rail industry. We commissioned research, Passengers' relationship with the rail industry[9], to explore the 'gap' between journey satisfaction and perceptions of performance and also to develop a measure to understand public 'trust' in the railways. The research found that some individual train companies are well trusted. But there are others that inspire less trust and, at best, more ambivalence in passengers.

6.2 To improve passengers' trust in the rail industry, train companies not only need to get the basic service right day-to-day, they need to put effort into building long-term relationships with their passengers:

- passengers' 'most frequent journey' scores lower than their 'last journey'
- passengers take a number of factors into account
- improving relationships may increase satisfaction.

6.3 Trust was found to consist of three elements: service, relationship and judgement. Service elements affect day-to-day issues such as punctuality, reliability, helpfulness of staff and value for money. They are the foundations for building passengers' trust.

6.4 Relationship factors are important to focus on to build trust once the service elements are in place. Some train companies have developed good relationships with their passengers. Communicating directly and proactively with passengers goes down well with them. Particular problem areas for communication identified by the research are confusion over ticketing options and when there are delays or cancellations. Communicating with integrity and transparency can inspire trust.

6.5 Many train companies score well on the third trust element – judgement. They are seen to have high principles, a good reputation and show leadership. However, judgement does not contribute as much to trust as service and relationship.

6.6 Passenger Focus recommends that the foundations and principles of building passenger trust are incorporated into the future rail franchise.

7. Bus services in Wales

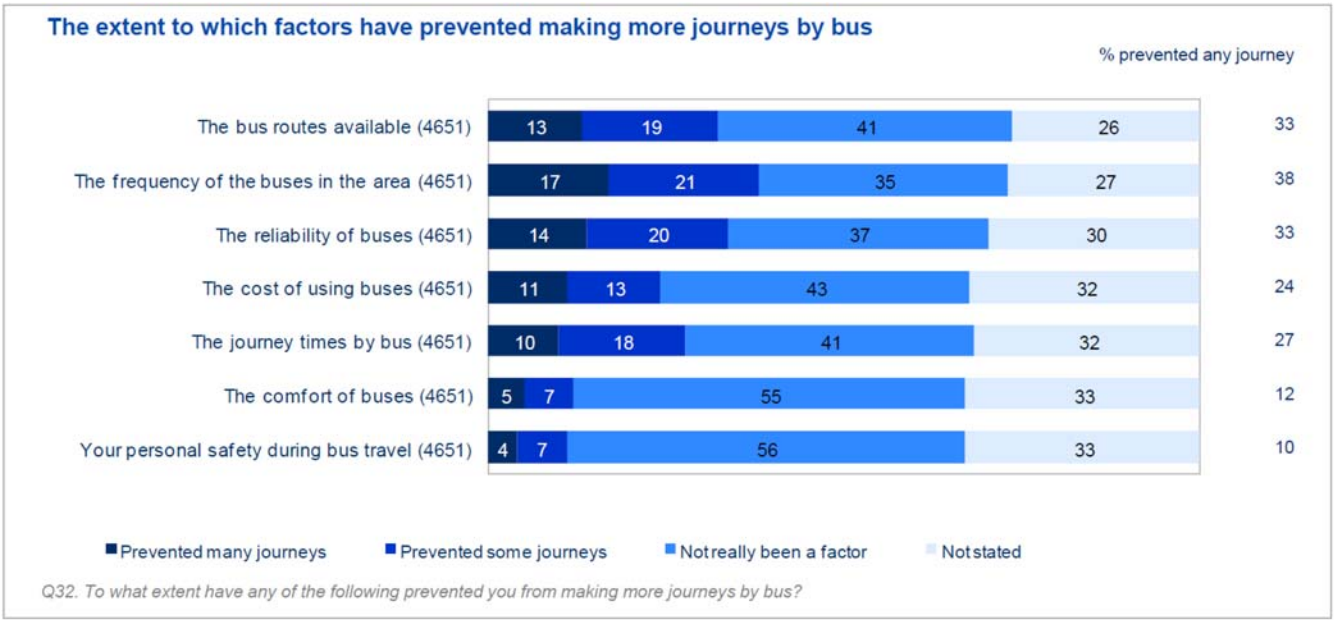
7.1 A Bus Passenger Survey was undertaken across Wales in 2010, commissioned by the Welsh Government and based closely on the methodology established by Passenger Focus. This survey was designed to be representative of the bus passenger journeys at Welsh Regional level.

7.2 Key findings from the survey were:

- Overall satisfaction with the bus journey: 88%
- Value for money (fare-payers): overall 61%; Age 16-34: 52%; Age 35-59: 70%
- Bus punctuality: 76%
- Personal safety: at the bus stop: 75%; on-board: 84%

[9] http://www.passengerfocus.org.uk/research/publications/passengers-relationship-with-the-rail-industry

7.3 In addition, passengers were asked what has prevented them making more journeys by bus. The results are shown below:



7.4 Passenger Focus recommends developing services in a way which focuses particularly on the aspects of service that drive passenger satisfaction. This provision should be benchmarked against comparator services through regular survey of bus passenger satisfaction in Wales.

7.5 Passenger Focus can make available a range of data to inform the development of a suitable regime.

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Appendix A – Passenger Satisfaction in Wales

NATIONAL PASSENGER SURVEY RESULTS **Autumn 2014**

Arriva Trains Wales and Main Route Groupings against Regional sector average (% saying satisfied/good)	Regional Sector	Cardiff & Valleys	Inter-urban	Mid Wales & Borders	North Wales & Borders	S.Wales &Borders W.Wales	Arriva Trains Wales
Overall satisfaction	**84**	80	82	82	93	83	83
STATION FACTORS							
Overall satisfaction with the station	**82**	79	81	67	63	76	75
Ticket buying facilities	**81**	76	87	80	75	84	79
Provision of information about train times/platforms	**84**	80	87	77	81	83	81
Upkeep/repair of the station buildings/platforms	**78**	64	78	59	66	70	67
Cleanliness	**81**	72	77	63	75	69	72
The facilities and services	**56**	29	66	56	44	56	44
The attitudes and helpfulness of the staff	**78**	73	86	78	69	77	75
Connections with other forms of public transport	**71**	58	75	64	46	74	61
Facilities for car parking	**55**	58	65	55	48	68	59
Overall environment	**76**	65	73	58	67	71	67
Your personal security whilst using	**75**	65	73	72	74	72	69
The availability of staff	**70**	61	72	64	61	65	63
The provision of shelter facilities	**77**	61	76	66	66	70	65
Availability of seating	**60**	45	59	45	52	53	49
How request to station staff was handled	**89**	90	94	98	100	87	93
Choice of shops/eating/drinking facilities available	**46**	21	55	40	28	42	32
TRAIN FACTORS							
Overall satisfaction with the train	**80**	78	80	80	89	76	80
The frequency of the trains on that route	**78**	86	83	53	64	71	76
Punctuality/reliability (arriving/departing on time)	**81**	74	79	74	85	81	78
Length of time the journey was scheduled to take	**86**	84	81	72	85	81	82
Connections with other train services	**77**	81	74	68	75	73	76
The value for money for the price of your ticket	**58**	47	57	70	61	59	55
Cleanliness of the train	**72**	62	78	78	82	73	71
Upkeep and repair of the train	**71**	56	75	82	88	70	69
The provision of information during the journey	**69**	55	74	76	84	65	66
The helpfulness and attitude of staff on train	**78**	81	80	87	91	82	83
The space for luggage	**60**	58	59	66	66	60	61
The toilet facilities	**43**	38	49	47	51	51	45
Sufficient room for all passengers to sit/stand	**72**	75	71	71	73	74	74
The comfort of the seating area	**71**	66	72	81	83	75	72
The ease of being able to get on and off	**83**	84	84	84	70	79	81
Your personal security on board	**80**	75	85	88	92	82	81
The cleanliness of the inside	**74**	69	79	77	82	73	74
The cleanliness of the outside	**73**	64	80	58	74	72	68
The availability of staff	**64**	67	71	75	83	66	71
How well train company deals with delays	**39**	20	39	57	82	32	37

More than 5% higher than sector average (green)
More than 5% lower than sector average (red)

Appendix B – Passenger research

National rail passenger survey – autumn 2014
http://www.passengerfocus.org.uk/research/national-passenger-survey-introduction

Rail passengers' priorities for improvement – October 2014
http://www.passengerfocus.org.uk/research/publications/rail-passengers-priorities-for-improvements-october-2014

Passengers' relationship with the rail industry – August 2014
http://www.passengerfocus.org.uk/research/publications/passengers-relationship-with-the-rail-industry

Ticket to ride? – May 2012
http://www.passengerfocus.org.uk/research/publications/ticket-to-ride-full-report-may-2012

Ticket to ride update – February 2015
http://www.passengerfocus.org.uk/research/publications/ticket-to-ride-an-update

Smart ticketing – what rail passengers want - July 2013
http://www.passengerfocus.org.uk/research/publications/smart-ticketing-what-rail-passengers-want-july-2013

Smart ticketing – mobile applications – November 2013
http://www.passengerfocus.org.uk/research/publications/smart-ticketing-mobile-applications

Smart ticketing - contactless payment for rail – December 2014
http://www.passengerfocus.org.uk/research/publications/smart-ticketing-contactless-payment-for-rail

Delays and disruption: rail passengers have their say – November 2010
http://www.passengerfocus.org.uk/research/publications/delays-and-disruption-rail-passengers-have-their-say

Passenger information when trains are disrupted – September 2014
http://www.passengerfocus.org.uk/research/publications/passenger-information-when-trains-are-disrupted

Integrated Transport - perception and reality – January 2010
http://www.passengerfocus.org.uk/research/publications/integrated-transport-perception-and-reality

Giving passengers a voice in rail services – June 2013
http://www.passengerfocus.org.uk/research/publications/giving-passengers-a-voice-in-rail-services