

# *South Western franchise*

## *Qualitative research*

### *Findings*

Produced for:

transportfocus 

# ***Background***

*Revised version of research  
debrief slides initially presented  
to Transport Focus and DfT on 19  
October 2015*

# Research objectives

*To understand passengers' current experiences of SWT and assess passenger aspirations for the future of the franchise*

**Journey planning and information**

**Station access and needs**

**Tickets and fares**

**Stations and trains**

**Performance issues**

**Staff and customer service**

**Service disruption**

**2017 re-franchising**



# Method and sample

*14 x 2 hour focus groups plus 6 depth interviews with passengers with disabilities. All recruited as current users of SWT. Locations chosen to get a cross section of passengers travelling to/from different places. Fieldwork 30 Sept-12 Oct 2015.*

Group location	Journey type	Age
London	Commute inside M25	Under 40
London	Business	Mixed
London	Commute outside M25	Under 40
London	Commute inside M25	Over 40
London	Commute outside M25	Over 40
London	Off-peak commuters	Core 25-55
Bournemouth	Leisure	Over 50
Bournemouth	Commute / Leisure	Under 45
Salisbury	Commute	Core 25-55
Salisbury	Leisure	Under 50
Guildford	Commute	Core 25-55
Guildford	Leisure	Over 50
Guildford	Business	Mixed
Isle of White	Commute / Leisure	Mixed

# *Pre-journey*

# Journey planning

*SWT site generally considered to be less good than alternatives*



**Default for many (website or app)**  
**Positive experiences**  
**Platform numbers good**  
**Booking fee resisted**



**Nat Rail/Nat Rail Enq confusion**  
**Gateway to TOC sites**  
**Some user-friendliness issues**  
**No fee not seen as a positive**

***I use the National Rail site  
because I might need to  
use the tube when I get to  
London and it will plan the  
whole journey but South  
West only does the trains  
[Commuter, Off-peak]***



**Minimal usage**  
**Not considered by many**  
**Not planning focused**  
**Useful for network info**

# Car parking - overview

*Use of station car parks was generally minimal*



***I work shifts but I  
always know I will be  
able to get a parking  
space in Aldershot car  
park because there  
aren't many people  
who are prepared to  
pay £7 a day  
[Commuter, Off-peak]***

**Spaces generally available at stations  
But considered to be expensive  
Most reluctant to add to cost of rail travel  
(especially frequent users/commuters)**

**Some leisure users more likely to pay 'premium' prices  
Obtaining permit from machine often difficult  
Insufficient disabled spaces at some stations**

# Cycling to stations

*Limited interest across sample even though some facilities have improved*



*There must be some trouble at Strawberry Hill because people put notices up saying their bike was stolen which isn't a great advert. They have CCTV but bikes seem to go missing [Business, London]*

**Still considered a minority activity**

**Seasonal opportunity at best**

**Some aware of recent changes**

**Many facilities greatly improved**

**e.g. Worcester Park, Fleet, Norbiton**

**Some aware of cycling promotion**

**Some security concerns**



# ***Tickets and fares***

***TVM = ticket vending machine***  
***TOD = ticket on departure***

# Fares

*Views on fares often based on inaccurate perceptions rather than knowledge*

**Knowledge of options often based on habit / assumptions**

**Unsure of certain fare criteria (peak / off-peak)**

**Necessary info not always available / sought**

**Complicated by Oyster boundary in London**

**Uncertain how to ensure best fare obtained**

**Equally true of commuters as other users**

*I pay as I go on my Oyster because there is a daily cap so I just stick £60 on it for the week and I don't have to worry about it  
[Commuter, in M25 U40]*



# Ticket purchase

*A frequent source of frustration across all passenger types*

## Commuters

- Monday morning renewal
- Often long queues
- TVM uncertainty
- Photocard complication
- Clunky / cumbersome

*It's far too difficult to renew my weekly ticket. The train company seems to have been slow to embrace the technology to make it work. They are good at taking the money but not good at making it straightforward for me.  
[Commuter, Guildford]*



## Leisure / Business

- More likely to need staff
- Staff unavailable off-peak
- Need validity reassurances
- Lack confidence in TVMs
- Happy to use TVM for TOD...
- ...but odd after buying online
- Unable to buy on trains

# Season tickets

*Role for TOC to provide clearer communication of benefits to passengers*

Low consideration of annual ticket

Minimal awareness of financial benefit

- and also discounts, compensation etc.

Is season ticket registered if it is lost?

Some misunderstand what they would be paying for

Some unable to afford if no employer loan scheme

Want to pay SWT monthly to get annual benefits

Many reluctant to make annual commitment (due to job insecurity)

Uncertainty over refund penalties off-putting

High interest in alternative to paper tickets

Ideally should be durable and smart

*I get six weeks holiday so I would be paying for my travel during my annual leave. The other thing is you get charged for seven days and I only work five days a week  
[Commuter, Guildford]*

# Value For Money

*Consistent views on fares but VFM perceptions much more variable*

**Fares unsurprisingly claimed to be too high**

**No real difference between peak / off-peak users**

**Exacerbated by annual fare increases**

- especially in context of RPI / salaries

**VFM often viewed more positively**

- especially those using Advance fares

**Active choice of rail over other modes**

- especially journeys into London

**Influenced by positive features of current franchise**

- especially rolling stock and performance

*What bothers me most about the fares is that they go up every year but I haven't had a pay rise for ages and there is no change to the service  
[Commuter, in M25 40+]*

# *Stations*

# Stations - overview

*Attitudes determined by station size and nature of journeys*

Responses mainly related to station size / type

Views relate to specific experiences

Needs based on how stations used

Basic hierarchy applies:

*Poole and Bournemouth are manned and well lit but places like Branksome and Harmworthy can be off-putting and intimidating [Commute/Leisure, Bournemouth]*

- information and personal security (hygiene factors)
- shelter / toilets / refreshment (critical success)
- higher level expectations of TOC e.g. free WiFi (surprise and delight)

Victorian buildings impact on functionality and attitudes

- many in need of attention / modernisation

# Facilities

*Specific station examples based on reported personal experiences*

## Good facilities

**Fleet – good example of new station with modern facilities**  
**Salisbury – refurbished and facilities improved**  
**Southampton – also benefitted from recent refurbishment**  
**Reading – benefits from considerable recent investment**  
**Wimbledon – busy station with everything needed**  
**Whitton – recently had new toilet (but usually locked)**  
**Mortlake – positive views from a small number of users**

## Poor facilities

**Bournemouth – well kept but poor facilities for station size**  
**Poole – not much available when waiting for trains**  
**Farnham – old station felt to be in need of modernisation**  
**Worcester Park – facilities available at peak times only**  
**Isle of Wight – all stations lack facilities**



# Environment

*Mixed picture but obvious room for improvement identified in certain areas*

## Station security

**Surbiton – staff always visible so always feel safe**  
**Woking – staff presence enhances security perceptions**  
**Hersham / Pokesdown – often unstaffed (at night)**  
**Stoneleigh / Branksome – poor lighting and scary**  
**Guildford – passengers dislike using underpass**  
**Upper Halliford – resident uses Sunbury instead**

## Waiting areas

**Hampton Court – lovely station to spend time at**  
**Wimbledon – nice waiting room and concourse area**  
**Poole – plenty of seating available**  
**Farnham / Aldershot – not enough platform shelter**  
**Hampton – limited cover and no toilets**  
**Putney – toilets usually locked**

# Waterloo

*Iconic status as the flagship of the South Western franchise*



**Positive views overall**

**Functions well as a major London terminal**

**Nice environment to wait for train**

**Ample retail / catering provision**

**Staff readily available**

**Easy access to platforms and info**

**But often difficult to buy tickets**

**And not enough seating**

***Waterloo obviously has lots of facilities but there are only about four seats and after I have been on my feet all day it would be nice to have somewhere to sit while I'm waiting for my train [Commuter, outside M25 U40]***

# Interchanges

*Platform information critical when interchanging. Many rely on apps*



**High importance to many passengers**

**Functionality has major journey impact**

**Recognised as a frequent stress point**

**Polarised views over Clapham Junction**

- sufficient information usually available
- but staff not always present when needed
- passenger volumes cause major problems



**Woking / Wimbledon tend to perform well**

- smaller / less busy than Clapham Junction



# *Trains*

# Trains – the rolling stock

*Regarded as an example of positive investment for benefit of passengers*

**Positive views overall**

**Some aware of new fleet**

**Better than old rolling stock**

**Generally good condition**

**Mostly clean and tidy**

**Contemporary design**

**Spacious and bright**

**Appropriate to journey type**



*The trains are beautiful, they really are. They're a huge improvement on what they used to be, a massive improvement [Commuter, in M25 40+]*

# Trains – facilities

*Evaluated on basis of journey rather than as a feature of SWT generally .  
Toilets and catering generally not expected for journeys under 60 minutes*

## ***Toilets***

- **Polarised views**
- **In terms of provision**
- **In terms of usability**
- **Accessible preferable**
- **Link to age of trains**

## ***Catering***

- **Majority expect nothing**
- **Trolley meets most needs**
- **Longer journeys only**
- **Off-peak only**
- **Accept practical limitations**

## ***Storage***

- **Generally adequate**
- **Carriages spacious**
- **Accept space / seat trade-off**
- **Minimal overhead provision**
- **Encourages bags on seats**

***The new trains are more spacious. It's better for people with pushchairs and there seem to be more dedicated areas for people with bikes.  
[Commuter, Guildford]***



# Trains – journey enhancements

*Facilities that would make journey time more enjoyable or productive.  
Higher need for WiFi and power sockets due to lack of phone signal*

## ***Phone signal***

- **Major dissatisfaction driver**
- **Network black spots**
- **Especially Farnham – London**
- **Impact on journey quality**

*We need WiFi on the trains.  
They have it on buses so why  
not on trains? You don't get 3G  
or 4G on the train at all and I  
don't know why  
[Commuter, Salisbury]*

## ***Power socket***

- **Similar to WiFi**
- **Can manage without**
- **But why not provide?**
- **Need if signal / WiFi**
- **Some aware of London Overground arrest**

## ***WiFi***

- **Related to journey length**
- **Unless no phone signal**
- **Need then amplified**
- **None expect to pay**

# Seating

*Many accept need to focus on realistic rather than idealistic solutions*

**All would prefer to get a seat but not all expect to get one**

**Major impact on VFM / satisfaction for most**

**But some have become more sanguine**

- **need to stand safely / comfortably**

**Positive about configuration options**

- **especially absence of 3+2 format**

**Seat comfort good enough**

**Leg-space a more important criterion**

**Some want table for longer journeys only**

**Airline seats / fold-down tables acceptable**

**Quiet coaches are welcome (but not always enforced)**

*It would be nice to get a seat, especially when you've paid in advance. It's a lot of money to pay to stand but I've just given up  
[Commuter, Salisbury]*

*The rows of seats that face in aren't very comfortable. They are narrow and too short for your legs but bearable for a short distance. The other seats are okay  
[Commuter, Guildford]*



# Standing

*Important implications for carriage design on different routes*

## Mixed views regarding standing

### Outside London often least tolerant

- higher expectation of getting a seat

### London commuters have specific perspective

- understand circumstances
- realistic rather than idealistic
- standing bearable for short journeys

### Empty 1st class creates frustration

*I don't mind standing because I'm still healthy but there must be a lot of people for whom it's a nightmare  
[Business, Guildford]*

*Sometimes there is one first class carriage, sometimes there are three. On really busy trains there seem to be a lot of first class carriages that are empty  
[Leisure, Salisbury]*

# *Performance*

# Frequency

*Generally positive views but additional peak service(s) would be welcomed on certain commuter routes*

**Critical performance indicator**

**Commuter issue primarily**

**Busiest areas well served**

**Aware of extra trains at peak times (but still overcrowded)**

**Frequency issues on some routes – examples given:**

- Shepperton line – 2 stopping trains p/h
- Worcester Park – poor service for busy station
- Brookwood – use Woking for more trains

**Common feeling that later last trains needed**

*I was really surprised at how frequent trains are from Woking to Waterloo. I'm not very good at time-keeping or going for the same train but sometimes they are about every three minutes*

*[Commuter, outside M25 U40]*

*In the summer season the last train back from Weymouth is 10.30 so if you're having a good time it would be nice to have a later train around 11.45 when the pubs close*

*[Commute/Leisure, Bournemouth]*

# Reliability

*Views across this sample broadly consistent and generally positive*

**SWT record felt to be good / improving**

**London commuters surprised / reassured  
for degree of journey reliability**

**But some problems recently experienced**

**Some aware of timetable revisions**

**Contingency built into journeys**

**Most understand / accept trade-off**

**Prefer to have punctual, longer journey**

- **to minimise otherwise regularly occurring delays**

*It depends which direction  
you are going regarding  
punctuality. If you are going  
to London it's not too bad. If  
you are going West or South it  
only needs one train out of  
sync and the knock-on effect  
is frustrating  
[Commuter, Salisbury]*

*A while ago they built in dwell  
time to the timetable to  
improve punctuality. I prefer  
the trains to arrive on time but  
it can be a bit frustrating  
sitting at stations and outside  
Waterloo sometimes  
[Business, Guildford]*

# Disruption - information

*Key issue is extent to which a TOC is proactive at informing passengers.*

*Regarded as the acid test for the TOC*

Passengers want TOC to be proactive at informing them of situation

- especially most frequent users
- especially when event significant

Quality / quantity of information key

Expect TOC to know more than passengers

Important to get frequent updates

- even if nothing new to add

And want staff to be honest and realistic

Suggest appropriate journey alternatives

Mixed views about use of social media

Some users positive about SWT Twitter feed

*They should give you as much information as possible so at least you know what's going on and how long you're going to be delayed. More information is better than less  
[Leisure, Bournemouth]*

*Their Twitter is quite good and it tells you what the delays are. They know before the staff do at the train station so I don't know how that works  
[Commuter, inside M25 U40]*

# Disruption - specifics

*Important for TOC to be honest and transparent with information provision*

## Bus replacement a last resort

- ample warning required
- but efficient Isle of Wight experiences

*Engineering works can be a pain in the neck but I find the internet is quite often inaccurate so I ring National Rail Enquiries and ask if there are any bus replacements  
[Leisure, Guildford]*

## Taxis a preferable alternative

- but Isle of Wight restricted to using one company

*It will be a good investment for the future. Hopefully there won't be a huge amount of disruption but I hope they provide advice because I don't know anything about it  
[Leisure, Guildford]*

## Low awareness of Waterloo work

- lack of information a concern
- needs to be addressed by TOC
- TfL cited as example to follow

# ***Staff and customer service***

# Staff – experiences

*Passengers would like more staff but assume there are cost implications*

**Positive response to staff overall**

**Individual not universal issues**

**Depends on person / circumstances**

**Mostly knowledgeable / helpful**

**Generally felt to do their best**

- but some less positive experiences too

**Some issues regarding deployment**

- especially at larger stations

**Inconsistent experiences of no valid ticket**

- assumed to be at discretion of staff

*I have often found staff to be very passionate, they're enthusiastic, train-y people and they are always very polite  
[Leisure, Bournemouth]*

*At Clapham Junction staff seem to congregate around the ticket barriers rather than being on the platforms where they would be more useful  
[Commuter, in M25 40+]*



# Staff – what passengers value

*Passengers value reassurance provided by staff presence*

## **Stations**

**Extensive knowledge of fares / network**

**Advice on best route / cheapest fare**

**Friendly / helpful attitude**

**Proactive with assistance / information**

**Visibility / presence**

*Some people may need help getting on or off and when the carriages are emptier late at night it would be nice to know where the guard is  
[Business, London]*



*I've seen a conductor helping out at the ticket office, letting people buy tickets off him to help reduce the queues. It doesn't happen often but I have seen it at Salisbury  
[Leisure, Salisbury]*

## **Trains**

**Sell and check tickets**

**Make appropriate announcements**

**Interchange advice**

**Sympathy for genuine mistakes**

**Visibility / presence**

# Customer service

*Participants had varied and isolated experiences of customer services*

**Intangible concept for most**

**Isolated experiences only**

**Compensation:**

- automatic (season ticket)
- easy / efficient online
- lack of information
- not worth bothering with

**Annual ticket refund**

- complex / frustrating
- poor service provision

*The customer service is very lengthy, so to deal with that particular claim took a period of nine months and it resulted in a negative for me  
[Commuter, outside M25 40+]*

*The guy at the station couldn't do a refund on my annual ticket so he filled out a form and three weeks later I called them and they had no idea. I had to call a team leader three times before I got any decent communication  
[Commuter, inside M25 U40]*

# *Island Line*

# Service provision

*Island Line generally felt to do a good job in difficult circumstances*

## Integration

**Sea crossing timetable coordination a major issue**

- especially for commuters

**Catamarans will wait but trains never do**

**Last train much too early (22.00!)**

## Stations

**Mostly functional with basic facilities**

**Inadequate shelter, seating and lighting**

**Part-time staff at end stations only**

## Trains

**Understand reason for trains being what they are**

**Always clean and suitable for short journeys**

**Some concerns about age of rolling stock**

**Journey comfort depends on driver**

## VFM

**Positive views overall**

**Cheaper and preferable to bus / car journeys**

**Hovertravel / Wightlink do academic season tickets**

# Island Line views on new franchise

*Much higher interest and concern about re-franchising on IoW*

**Higher awareness of refranchising on IoW**

**Many aware and worried about proposals**

**Island Line may not be part of new franchise**

**Concerned about implications for service**

**Wary about concept of a 'social enterprise'**

**Feels like thin end of wedge for passengers**

**Expect service to be less good after 2017**

*It doesn't matter if it makes a loss, it provides a vital service on the island and the new franchise holder should have to take the rough with the smooth  
[Isle of Wight]*

*I've got a horrible feeling they will try to turn the Island Line into a steam railway for tourists  
[Isle of Wight]*

# *Issues for passengers with a disability*

# Case study summaries

*Reported problems illustrative of challenges using network*

## Wheelchair

Unable to use electric chair due to gap e.g. at Hampton  
Lack of staff makes careful planning essential  
Want to sit with family on train not segregated

## Mobility

Has to get taxi due to lack of disabled parking spaces  
Lift never working but staff helpful  
Disability not obvious so can't get seat

## Vision

Lack of service from SWT staff (vs Virgin)  
Information displays and announcements unclear  
Station design a problem if assistance not booked

## Hearing

Announcements unclear  
Background noise difficult when talking to staff  
Busy stations confusing and difficult to lip read

# *Segment overview*



# Commuters

*Would like a better deal but don't always necessarily expect to get it*

**Consider they get worst deal**

**Overcrowding a big issue on some routes**

**But relatively tolerant overall**

**Pragmatic about standing space**

**'Could be worse' mentality for most**

**SWT compare well with other TOCs used**

**Many positive about key service elements**

- **punctuality/reliability/frequency**

**Some off-peak commuters less tolerant**

- **less forgiving when problems occur outside peak hours**

*The price is the wrong way round because some people pay less to get a seat and I pay more for a worse service  
[Commuter, inside M25 U40]*

*I can get First Great Western from Reading to Paddington and it's always crowded and dark and I don't enjoy it. But into Waterloo it's quite a pleasant journey because the seats are nice and they have quiet zones  
[Commuter, outside M25 U40]*

# Leisure users

*More likely to be in a position to enjoy the SWT journey experience*

*You can work out the best deal, when is the best time to go and come back and you can read a book or go to sleep if you want, it's more relaxing than being in traffic*  
*[Leisure, Bournemouth]*

**Much more journey flexibility**

**Usually travel off-peak**

**Pay less and able to get a seat**

**Tend to have more straightforward needs**

**- making them easier to meet**

**SWT compare well with experiences of other routes**

**Some claim to enjoy journeys**

**Journey times make rail preferable to other modes**

*I always travel off-peak, whether it's at the weekend or after 9.30 so it's always cheaper and the trains are less crowded*  
*[Leisure, Guildford]*

# Business users

*Positive views in context of mainly London-centric business journeys*

**Attitudes somewhat mixed**

**Views tend to be journey specific:**

- **peak less favourable than off-peak**
- **may depend on nature and purpose of journey**

**Often well placed to make comparisons**

**SWT felt to perform reasonably well**

**But more difficult to assess VFM**

**Employer usually paying for travel**

*I can park in the station car park or most of the time I'm travelling in the afternoon so I can just park along the road for free  
[Business, London]*

*During the day it's a Godsend to be able to get a seat but on the way back after meetings I want to be able to put it on the laptop but I can't because I haven't got a seat  
[Business, Guildford]*

# *Aspirations for future franchise*

# Passenger experience

*Some encouraging signs and obvious opportunity for improvement identified*

**Mixed experience under current franchise**

**Certain improvements acknowledged in recent past**

**Satisfaction with rolling stock epitomises positive views**

**Attempts to improve punctuality having favourable impact**

**Although still room for improvement in critical areas**

**Overcrowding problems can affect any type of journey**

**Capacity concerns will be exacerbated by increased demand**

**Potential to enhance VFM via ticketing/information improvements**

**Passengers want to see investment under new franchise**

# Current strengths

*Broad consensus of areas in which SWT felt to perform well*

## Aspects of current service to retain:

### 1. Service frequency

- especially busiest commuter routes

### 2. Punctuality

- even if slightly longer journey times required

### 2. Current levels of cleanliness

- primarily associated with trains
- stations to lesser extent

### 4. Level of service provided by staff

- maintain current staffing levels
- ideally additional staff required



# Improvement areas

*Key priorities suggested*

## Key themes identified from this research:

### 1. Additional capacity needed, especially to reduce overcrowding

- either via extra carriages or more frequent peak trains
- and later last services required on many routes

### 2. Station enhancement and modernisation

- shelter, seating, facilities, security

### 3. Enhance on-train journey experiences

- sockets, WiFi, USB ports, air conditioning

### 4. Ticketing innovation

- smart, e-tickets, links to updates

### 5. Improved information provision

- real time, especially during disruption



# *Franchise process and SWT brand*



# Awareness

*Passengers typically adopt attitude of hoping for best but fearing the worst*

**Minimal knowledge of franchise process**

**No awareness of length of current franchise**

**Majority welcome 2017 re-tendering**

**Passengers feel competition in their best interests**

**Assume decision likely to be cost-based**

**5 years not long enough franchise period**

**Think 10 years needed for TOC to invest**

**But ideally with mid-term break clause**

*It's good in theory but will it be judged on service or return on investment? We need to know how it will be measured  
[Commuter, Off-peak]*

*10 years is a long time to get it wrong if the company is not performing but it probably needs to be that long to get a return on the capital invested  
[Leisure, Guildford]*

**Evaluate performance against bid commitments**

# SWT / Stagecoach

*Minimal evidence of emotional connection between passengers and SWT*

## **SWT**

**No strong feelings**

**But sense of 'could be worse'**

**Some improvement recognised**

**No sense of genuine relationships**

**Social media strengthens engagement**



## **Stagecoach**

**Low spontaneous knowledge**

**High prompted awareness**

**Mainly negative views**

**Felt to have poor media profile**

**Focused on Scottish owner**



***WE HELP  
CLIENTS TO  
SEE FURTHER,  
GO FURTHER***

***THANK YOU***

[andy.firman@aecom.com](mailto:andy.firman@aecom.com)