

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:

- 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

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

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]*

*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]*

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

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

Evaluate performance against bid commitments

*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]*

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

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