

Board Meeting Paper	
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Restricted or confidential Information?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If confidential, protective marking ¹	
Date of Meeting	19 September 2012
Agenda Item	7.0
Report Title	Review of passenger and industry facing work - first quarter of 2012-13 (April-June)
Sponsor	David Sidebottom
Author(s)	David Sidebottom, Jon Clay, Kyle Yeldon



1. Representing passenger interests

Utilising our three core sources of what passenger's tell us about their journey experiences – National Passenger Survey (NPS), Bus Passenger Survey (BPS) and our rail appeals work, we undertook work in quarter one with a range of industry stakeholders to make sure passenger interests are articulated and then acted upon.

National Passenger Survey

We targeted discussions with several train operators to make sure they understand what the results mean and to start work on addressing areas of specific concern. We are not talking to all train operators about NPS results but focusing attention on those operators where we have concerns about a specific set of results or where a trend has been developing for some time.

Our work has included the following operators:

- East Coast – discussed overall results and agreed individual action plans for each East Coast station to improve future NPS results.
- Northern Rail – discussed overall results and the operator is now reviewing train cleanliness regimes to improve future results.
- ScotRail – discussed overall results and agreed action plan to improve passenger satisfaction with information provision at times of disruption.

Discussions with other operators on the back of more recently published NPS results will feature in my quarter two report.

Bus Passenger Survey

In March 2012 Passenger Focus published the latest Bus Passenger Survey. Throughout quarter one the Passenger Team followed up the distribution of the individual authority and operator results to make sure that stakeholders were making best use of the research data and setting up action plans to address poor areas of performance.

¹ ie RESTRICTED plus COMMERCIAL / POLICY / STAFF / PERSONAL PROTECT

This work was undertaken across the Passenger Team in three ways:

- Individual meetings with operator and/or transport authority personnel where results were applicable and it was feasible to do so.
- Discussions with national bus industry stakeholders (bus groups, industry representative bodies, passenger and special interest groups etc).
- Centralised email communication from the team to a range of stakeholders.

In general terms the feedback from the industry has been very supportive and encouraging. The BPS results have certainly been useful in focusing the attention of many transport authorities and operators on key passenger priorities. On a positive note the BPS results are being used as a barometer by transport authorities to assess how investment of DfT's "Better Bus Area" funding is being noticed by passengers. In turn this is supporting our strategy to encourage more financial investment in BPS by authorities and operators to help develop a broader base of work across the country.

This is perhaps best evidenced with our work in the West Midlands through the partnership between Centro (Passenger Transport Executive) and several bus operators. Three key areas of passenger concern were identified through our BPS work in 2011-12:

- Bus punctuality
- Security and antisocial behaviour on buses
- Driver attitude

Work to address improvements includes:

- **Punctuality** - increased the number of staff analysing bus punctuality and reliability to look hard at getting buses out of depots on time. In addition drivers are receiving training on time management to help deliver more consistent performance along routes. Future plans call for real-time information screens at specific bus stops.
- **Security and antisocial behaviour on buses** – Funding secured for two additional police officers who have powers to arrest those causing significant problems. Additional CCTV fitted to buses that did not previously have cameras fitted.
- **Driver attitude** – Programme of customer service training and awareness through internal award schemes within operators.

Centro and National Express commissioned follow-up BPS work in May 2012 to assess the impact of these initiatives. Results available in my quarter two report.

In addition to our general work with locally based bus operators and transport authorities we have held very useful briefing sessions with senior management teams from the large bus groups (First and Go-Ahead), Confederation of Passenger Transport (CPT) and Association of Transport Co-ordinating Officers (ATCO).

Through these national networks we have been able to share information about BPS and also encourage industry stakeholders to start thinking about the next wave of BPS in autumn 2012, particularly about match funding to boost our work in certain areas. This will feature more in my quarter two report.

Rail appeals work

The Passenger Managers (Robert Samson and Linda McCord) pick up escalated rail appeals issues and trends to progress and resolve with train operators. In quarter one this work has included:

- Handover of “legacy” complaints and appeals work following the transition from National Express East Anglia to the Greater Anglia franchise. This also involved work with C2C. We set out our dissatisfaction with the new arrangements to the Managing Director of Greater Anglia which resulted in an agreement to resolve outstanding appeal cases. In addition we have expressed this issue to the Department as an issue to monitor for future franchise mobilisation.
- Met with management from Grand Central and Southeastern to address poor complaint handling processes and response times.
- Ongoing management and scrutiny of high workload issues involving East Coast Trains.

As workloads remain high on our contact team it is important that we continue to pick up trends from our caseload to focus the attention of train company managers.

2. General engagement work with stakeholders

User groups

In quarter one we completed our series of workshop sessions with transport user groups across Great Britain.

The final workshops took place between April and June in York, Preston, Cardiff and Perth. This completed the series of eight successful sessions started in January 2012.

In quarter two I will report on the more detailed findings but some immediate work in quarter one enabled us to set-up a dedicated section on our new website for user groups to help them more easily access our core research products as well as the material we presented and shared at the eight workshop sessions.

National stakeholder work

We continue to provide a mix of verbal and written updates to a cross-section of national stakeholders to help deliver key messages about our bus and rail research work as well as supporting our national theme work. These have included:

- Discussions with Age UK and DEFRA on our Bus Passenger Survey and Reductions to Bus Service research reports
- Gave evidence to Welsh Affairs Select Committee on cross-border connectivity
- Chaired and attended train operator passenger panels and stakeholder events (Chiltern, ScotRail, First Great Western, Southeastern) to highlight recent research and update them on more general Passenger Focus work
- Discussions with Transport Scotland on the next ScotRail franchise
- Provided the various transport consortia in Wales with written updates on our work for passengers

General work with industry

In quarter one we were able to react to a number of specific area/operator based issues on behalf of passenger or user groups. These included:

- Liaison with user groups across parts of Cumbria and Lancashire affected by proposed First TransPennine Express 2013 timetable changes and how the groups can usefully input and influence the process
- Discussions with Cross Country and ScotRail on December 2012 timetable proposals

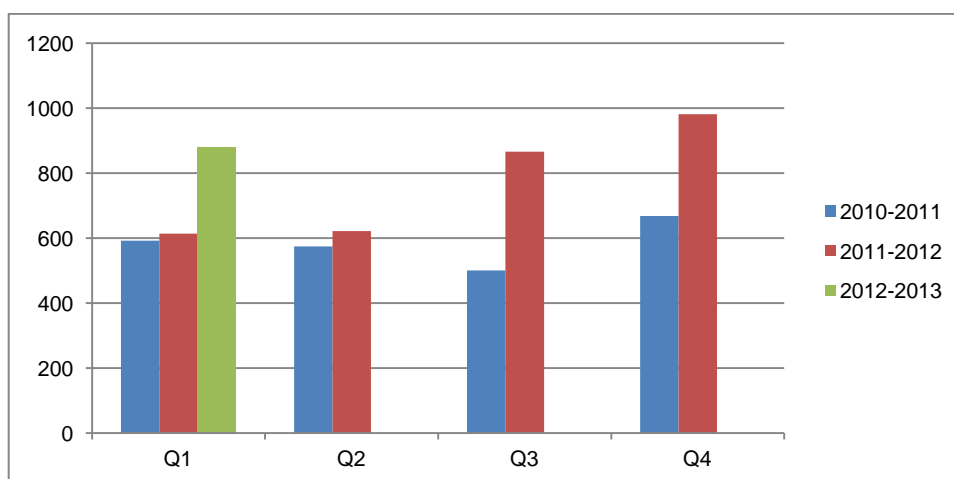
3. Passenger contact *(please see section 5. below for glossary of terms)*

	Q1	Q4	Q3	Q2
Case workload	(Apr-June)	(Jan-Mar)	(Oct-Dec)	(Jul-Sep)
Total appeals opened	880	981	866	622
Total appeals closed	778	742	761	690
Bus enquiries logged	3	2	7	4
Coach enquiries logged	0	1	0	2
Tram enquiries logged	0	0	0	0
Rail enquiries opened	86	133	93	103
Rail enquiries closed	80	125	89	101
Complaint cases opened	4	4	4	3
Complaint cases closed	1	2	2	0
Praise cases logged	39	42	41	14
Re-direct cases logged (LTW)	100	140	137	85
Passenger Satisfaction (target 70%)	86%	85%	83%	77%
Total passenger contacts <i>(email, fax, web form, letter and calls via First Call)</i>	3732	3818	3674	3456

In quarter one, we had a 10% decrease in the number of appeals compared to the previous quarter. However compared to the same quarter in 2011-12 we have an increase in appeals of 43%.

Throughout this quarter, we continued to maintain high levels of passenger satisfaction. The number of passengers praising our work also remains high, with the number of complaints about our work at just 0.5% of the total number of cases opened.

Overview of appeal complaints opened Q1 2010-11 to Q1 2012-13:



TOCs generating most comments this quarter:

	No. comments	Top comment categories
East Coast Trains	363	Fares, retailing and refunds (107); penalty fares/UFNs (94)
Virgin Trains	202	Fares, retailing and refunds (57); staff conduct (32)
Greater Anglia	138	Fares, retailing and refunds (39); train service performance (34)

The top two operators generating the most comments remains the same, however Greater Anglia is currently the third operator generating the most comments. Fares and retailing continues to be our top comment this is mainly made up of concerns regarding refund conditions and administration of tickets.

The contact team continue to flag up recurring themes and issues with our Passenger Managers in the Passenger Issues Team, who are able to provide guidance as well as escalate issues within the industry to drive improvements for passengers.

Contacts review programme

- **Workload:** We are continuing with the trial of the new work allocation system. This trial was due to end in May but has been extended again till August. It was felt that this would give the team more opportunity to trial the new way of working. A review of the trial will be carried out in September 2012.
- **Quality monitoring:** The new quality monitoring system has been established with cases reviewed each month and feedback provided on the handling of the case to the advisors. This has been welcomed by the team who are keen to improve current standards but also establish some best practice across the team.

- **Train company performance reports:** The first tranche of this reporting was carried out in Quarter one of 2012-13. East Coast, First Great Western and Virgin Trains have received their performance reports along with some highlighted issues from the complaints received by the team. No response has been received from either of the TOCs; however, this will be followed up through our ongoing discussions with them.

4. Other projects report

A significant amount of work was undertaken in quarter one to help deliver our various responses to new rail franchises and other key areas of our long-term influencing and stakeholder strategy work by building the systems and capability to reach our various stakeholder groups:

Fares and ticketing

- **Ticket to Ride:** Provided project management support throughout the delivery of this campaign. The examples of complaints used were all sourced from cases which we handled. These were critical to the success of the report publication as they really helped the messages to hit home within the media and industry.

New rail franchises

- **Great Western Franchise:** Work to influence bidders began following the completion and publication of our consultation response in April 2012. We met bid teams to talk about ticketing issues and complaints handling. We met a Member of Parliament to discuss the franchise and the concerns of their constituents.
- **Thameslink / Southeastern Franchises:** The initial submission regarding the combined franchise was submitted in May. We contacted stakeholders to tell them about this and the consultation document which was also published. We sent updates to stakeholders to let them know about the expected forthcoming consultation procedure. The DfT consultation events were announced at short notice to begin at the end of June and arrangements were made for us to attend and speak at these. The attendance at these events was poor as they had not been well publicised. We began to assist the DfT in publicising the other events at the beginning of June to ensure more effective consultation with stakeholders.
- **Essex Thameside Franchise:** Attended Thames Gateway & South East Rail Group to present passenger views on existing C2C research and discuss the forthcoming franchise. Our consultation response was finalised and submitted in May. Stakeholders were updated with links to initial and further Passenger Focus submission documents and contact details for confirmed bidders.

Also in quarter one a large amount of system development and integration work took place to build the long-term capability for the organisation to reach both passenger and stakeholder contacts more effectively and consistently with key communications:

- **Customer Relationship Manager (CRM) system build:** Successfully managed suppliers to build a new upgraded system which has combined both our previous systems which were used separately for passenger appeals and stakeholder details. This system offers an array of new functionality which will be exploited over the course of this year to improve our handling processes for passengers and methods for stakeholder engagement. Early discussions have taken place as to how we can integrate web-forms on the Passenger Focus website with CRM to automate processes for passengers.
- **First Call access to CRM:** We have enabled external access to our CRM system and have trained First Call staff (our frontline call handling provider) on how to use it. They are now using it to log appeals and enquiries when our office is closed. The success of this will be monitored and considered when we review our contact processes later in the year.
- **CommuniGator System:** This is an email system which is powered by the data held in our CRM system. We have worked with suppliers to purchase and implement this system. It is very powerful and gives us new opportunities to improve how we reach and engage with stakeholders and passengers. A lot of work will take place during quarter two to begin exploiting this system. The benefits anticipated will include being able to allow passengers and stakeholders to choose their own subscription preferences, meaning they receive information of interest to them. This will help us to extend our influence in the industry.
- **Stakeholder contact details:** We began the delivery of a process to ensure the stakeholder contact details we hold are accurate. The first stage has been delivered using CommuniGator; we emailed stakeholders a personal web-form containing their details asking them to update them if they are inaccurate. If they update details the web-form automatically synchronises with our CRM system and updates their details. The process will be completed in the next quarter by us writing and phoning contacts whom we were unable to email. After this process we should have a database containing the most accurate stakeholder details we have ever held, which will allow us to engage more effectively with stakeholders.
- **Stakeholder mapping:** Work has begun to map all our key and important contacts which are vital to our organisations ability to deliver against our work plan. A workshop was held with the Passenger Issues Team to identify their stakeholders. Similar exercises will now be undertaken with other teams. The results will be analysed to ensure we are not duplicating work and that no gaps exist in our engagement. The completed work will be integrated into our stakeholder engagement/communications strategy which will shortly be reviewed.

Looking ahead to Q2 2012-13:

In addition to progressing the new work plan, some franchise work has become a higher priority for Q2:

- **East Coast Franchise:** The East Coast franchise renewal project is now under way, with a response to be submitted in August 2012
- **TPE/Northern Franchise replacement:** Initial work has started on the TPE and Northern Franchise replacement project. Research will be carried out in July, with an initial submission by Passenger Focus likely in September

5. Glossary of Passenger Contact Terms

Appeal complaint	A complaint the operator has been unable to resolve, the passenger is seeking our help to resolve the matter.
Initial complaint	The passenger has a complaint about their operator and has approached us in the first instance without complaining to the operator. The passengers should allow the operator the opportunity to resolve the complaint before Passenger Focus can get involved.
Enquiry	Any enquiry about Passenger Focus and its work, passenger rights or a general enquiry about the rail, bus, coach or tram industry.
Redirect	A contact or complaint outside of our remit, such as for London TravelWatch or Bus Users UK.
Copied in	The passenger has copied us in to a correspondence that they have sent to another organisation.
Praise	Positive feedback about Passenger Focus, its work or its complaint handling.
Complaints about us	Any complaint about Passenger Focus or any aspect of its work. This includes the way Passenger Focus has handled an appeal.