

South Western franchise: passengers' experiences and hopes for future services

January 2016



Introduction

Transport Focus has long said that passengers, now the majority funders of the railway, should be at the heart of all decisions. This includes new franchise deals.

We believe that passengers' views should be taken on the new service, and their interests placed at the heart of the contract. That's why we carried out bespoke research into the passenger perspective, to supplement the data we already have from existing research.

The South Western franchise, currently operated by Stagecoach as South West Trains, ends in June 2017 and the Department for Transport (DfT) is running a competition to find an operator for the next franchise.

As part of the consultation process the DfT asked Transport Focus to carry out research to understand passengers' current experiences and explore their needs and aspirations for future South Western services.

We carried out qualitative (focus group) research and found that passengers reported a somewhat mixed experience, with some positive aspects and a number of areas requiring further development.

Passengers have positive views about the majority of the trains, recognising that many have been replaced under the current franchise, and are considerably better than previously. Feelings towards staff are also largely positive. Where passengers have experience of dealing with staff the majority have found them to be pleasant, knowledgeable and helpful. Passengers highly value staff presence and visibility, and they would like to see this enhanced on both trains and at stations.

Some passengers recognised that there had been attempts to improve punctuality and reliability but consider that this critical area of performance still needs further improvement. Capacity – that is, the space to sit or stand on a service, and the number of services available - is a significant area of current dissatisfaction.

Fares are widely considered to be too high. Views on value for money are more varied and positive opinions have generally been influenced by good experiences of things such as rolling stock, performance or having used a lower-cost Advance ticket.

Passengers identified several key areas for improvement:

- capacity and seats, both number of carriages and frequency
- information provision, particularly during disruption
- innovation in ticket types and products
- on-board experience
- station enhancement and modernisation.

We will now work with the DfT to highlight these, and other issues, and to seek a franchise specification that reflects passenger needs and provides a framework for prospective bidders to propose ambitious and high-quality proposals.

Key findings from this research

The following sections summarise the key findings we identified, referencing Spring 2015 *National Rail Passenger Survey* (NRPS)¹ and other research results for context where appropriate.

Capacity

Overcrowding is identified as an issue, not just during the peak or only affecting commuters, but across the network. All passengers would prefer a seat and many feel that having bought a ticket they are entitled to a seat.

Some people, especially those making a short commute to and from London, have become resigned to the fact that they will not get a seat. In this situation they want to stand safely and comfortably and welcome a train layout which allows for this.

Passengers outside of London or travelling off-peak were the least tolerant of having to stand. Not being able to get a seat has a negative impact on passengers' perceptions of the operator, the overall journey experience and value for money.

The NRPS reinforces overcrowding as a particular area of concern for passengers on South West Trains. Only 61 per cent of passengers are satisfied that there is sufficient room to sit and stand, compared to a London and South East sector average of 63 per cent and a national score of 65 per cent. South West Trains passengers travelling during the peak are considerably less satisfied, at 37 per cent, than off-peak passengers, at 68 per cent.

Our 2014 research into *Rail Passengers' Priorities for Improvement*² found that 'passengers are always able to get a seat on the train' is the third highest priority for improvement for South West Trains passengers.

Although satisfaction with frequency is generally good, and this is seen as an area that must be at the very least maintained, there are exceptions. Passengers believe that additional services (as well as extra carriages) are needed to relieve congestion at busy times.

There is also a common desire for trains that run later into the evening and timetabling better designed for passengers' needs.

¹ <http://www.transportfocus.org.uk/research/national-passenger-survey-introduction>

² <http://www.transportfocus.org.uk/research/publications/rail-passengers-priorities-for-improvements-october-2014>

We know that 'trains sufficiently frequent at the times I wish to travel' is the second highest priority for improvement for South West trains passengers. In the NRPS, satisfaction with frequency is 74 per cent compared to 73 per cent for the sector and 75 per cent nationally.

Performance

Passengers generally feel that South West Trains' record on performance has been getting better. Nevertheless, they believe there is still room for further improvement in this key area. Currently 76 per cent of South West Trains' passengers are satisfied with punctuality and reliability, slightly above the sector average of 73 per cent.

Punctuality and reliability is of critical importance to passengers, and particularly to commuters. Recent research³ demonstrates a clear link between punctuality and overall satisfaction, which declines one and a half percentage points for every minute of lateness (three percentage points for commuters).

Some passengers are aware that punctuality and reliability has improved on South West Trains as a result of revisions to timetables. There is some cynicism about additional time being built into timetables and a feeling that the operator may be motivated by a desire to meet performance targets. While passengers appreciate trains being on time they do not want the trade-off to be a journey that is longer than necessary.

Our research found that 'more trains arrive on time than happens now' is the fourth highest improvement priority for South West Trains' passengers. This is closely followed by 'less frequent major unplanned disruptions to your journey' and 'fewer trains cancelled than happens now'. 'Journey time is reduced' is the eighth highest priority and still more important than the average.

Information

Passengers clearly want better information to be provided, particularly during disruption. Passengers want the train operator to be proactive in offering information and advice. Frontline staff are not always thought to have the most up-to-date information, or often to know any more than the passengers, and this is seen as unacceptable.

Both the quality and quantity of information is important. It must be honest, realistic and consistent across all channels, and updated frequently even if there is nothing new to add. We know from our other work⁴ that providing honest and transparent information enables an operator to build trust and an improved relationship with its passengers.

³ <http://www.transportfocus.org.uk/research/publications/train-punctuality-the-passenger-perspective>

⁴ <http://www.transportfocus.org.uk/research/publications/passengers-relationship-with-the-rail-industry>

Passengers in this research had low awareness of the major engineering works planned at Waterloo. Bearing in mind the likely extent and impact of any disruption, this is an area of concern and one that must be promptly and carefully addressed.

South West Trains' satisfaction score for usefulness of information during delays is 42 per cent compared to 40 per cent for the sector. Satisfaction with how the train company dealt with delays is 36 per cent, higher than both the sector and national averages at 30 per cent and 34 per cent respectively, but still offering significant room for improvement in this crucial area.

Ticketing

The process of buying tickets is a source of frustration for many. Weekly and monthly season-ticket holders are often caught up in Monday morning queues at ticket offices as they renew their tickets. There is a common feeling that this process could be made simpler and quicker.

Less-frequent travellers may lack confidence in their ability to buy the best ticket for their journey from a machine, even if they are aware that this is an option for them. Leisure and business users are more likely to require assistance from staff, seeking advice and reassurance about journey and ticket choices. For some of those who choose to book online the necessity to still collect a paper ticket seems counter-intuitive.

There is a significant amount of interest in a 'smarter' alternative to current paper ticketing⁵. This chimes with other research we have carried out which indicates that passengers find the ticket purchasing experience complex and uncertain.

Across all groups of passengers there is a desire to make the ticketing process smoother, easier and more convenient. People want to see innovation that will deliver improvements to each stage: purchasing a ticket, ticket types (such as smart and e-tickets) and in providing relevant updates after the purchase has been made.

On-board experience

Views on rolling stock are positive overall. Passengers say that trains are new, with good design and comparing well to that of other operators. However, there are a number of areas relating to the on-board experience which passengers want to see improved.

Mobile phone signal issues across the South West Trains network are a major source of dissatisfaction. The main impact of this is that it stops passengers being able to use their time on the train in the way that may be most desired and useful.

⁵ <http://www.transportfocus.org.uk/research/smarter-travel>

Wi-Fi is seen as essential to many, especially for longer journeys. Again, this is seen as crucial to allow passengers to make the most of the time they spend on the train. This need is amplified by the lack of a reliable mobile phone signal. Consistent comparisons are made to the wide availability of Wi-Fi in so many other retail or transport settings. Wi-Fi is expected as a minimum to be reliable and free.

Power sockets or USB ports, especially on longer journeys, are viewed as potentially useful. It is clear that improvements in these areas could enhance the overall rail journey experience for passengers.

Stations

Views of stations are understandably mixed dependent on station size, past experiences and individuals' varying requirements. However, there is still a consistent theme of quality information provision and good levels of personal security being fundamental requirements.

Waterloo is felt to perform well as a major London terminal. It is considered spacious enough to cope with high volumes of passengers. The range of retail and catering outlets are appreciated and it is seen as a pleasant place to pass time while waiting for a train. However, some had experience of long queues to buy tickets and there is not thought to be enough seating.

Overall passengers feel that some stations could benefit from enhancement and modernisation. Shelter, seating, facilities and security are areas that could be improved in the next franchise. These findings are supported by NRPS results for several of these factors which see South West Trains scoring below the national average. Satisfaction with the provision of shelter facilities is at 62 per cent compared to 66 per cent nationally.

The satisfaction level with availability of seating for South West Trains at 38 per cent is ten percentage points lower than the national score of 48 per cent. Satisfaction with personal security is 69 per cent compared to a national average of 71 per cent. At 58 per cent satisfaction with facilities and services is the same as the national score.

What next?

Our aim is to ensure that passenger interests are placed at the heart of the next South Western franchise. The findings from this research provide a useful insight into passengers' current experiences and their aspirations for the future.

We will be drawing on this, alongside our wealth of other research, to inform our further work on the franchise. This will include ongoing dialogue with the Department for Transport as they develop the specification, a formal response to the

Government's consultation and discussions with bidders as they shape their proposals.

Aecom's full report of the qualitative research with South Western passengers is available on our website. Aecom conducts research in accordance with the Market Research Society Code of Conduct.

Further details of all our publications exploring passenger perspectives on a range of issues can also be found on the Transport Focus website (www.transportfocus.org.uk).

© 2016 Transport Focus



Transport Focus
Fleetbank House
2-6 Salisbury Square
London
EC4Y 8JX

0300 123 2350
www.transportfocus.org.uk
info@transportfocus.org.uk