



## Foreword

Transport Focus believes it is vital that passengers' views influence the key decisions when new franchises are let and that their interests are placed at the heart of the contract.

For the next InterCity West Coast franchise this perhaps matters more than usual, given the disruption to the previous franchise competition. We therefore wanted to ensure that we carried out bespoke research into the passenger perspective to add to what we know from existing research.

The InterCity West Coast franchise, currently operated by Virgin Trains, ends in April 2018 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 InterCity West Coast services.

We carried out qualitative (focus group) research and the findings indicate that the current experience is largely a positive one for the majority of passengers. It holds up well in comparison to both other modes of transport and other rail journeys. InterCity West Coast is seen as generally performing well against alternatives in a range of areas including value for money, journey experience, and reliability and punctuality.

Passengers want to see these good points maintained at the least, if not improved. Nonetheless, there are some key areas identified as requiring improvement and worthy of a particular focus within the next franchise:

- a fare structure that is transparent and easy to understand
- a simple, seamless ticketing process
- on-board enhancements to luggage storage, Wi-Fi and toilets
- increased staff visibility and a proactive approach to customer service
- overcrowding of concourse and train boarding issues at Euston Station
- customer recognition and reward.

We will now be working with the DfT to highlight these and other issues. We will seek a franchise specification that both 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 have identified from this research. Relevant Autumn 2015 National Rail Passenger Survey (NRPS)<sup>1</sup> results and findings from other research are referenced for context where appropriate.

### Fares and ticketing

Perceptions of value for money are found to be intrinsically linked to perceptions of choice. Passengers who can be flexible about when they travel are often able to find a low-cost fare and feel that the train represents good value for money. Where there is a choice between different modes of travel InterCity West Coast is thought to compare well against alternatives.

These relatively positive findings about pricing reflect an NRPS score of 63 per cent satisfaction with value for money of the price of your ticket. This is notably higher than the long-distance sector average of 58 per cent and the national score of 48 per cent.

It is those passengers who have no choice, over either what time they travel or by what mode, who are the least satisfied with value for money. There is some acceptance that paying a costly walk-up fare is the consequence of being unable to plan your journey in advance.

Despite this, it is difficult for passengers to understand why there can be such a big difference between these and the cheaper fares. Charging the higher-priced fares can seem opportunistic and profiteering on the part of the train company.

Our 2014 research *Rail Passengers' Priorities for Improvement*<sup>2</sup> found that, for InterCity West Coast passengers, the 'price of tickets offers better value for money' is the second highest priority. It has an importance of nearly five times higher than an 'average' factor.

Many passengers struggle to fully understand the fare structure and pricing. Significant differences in cost between similar journeys seem illogical. This means that passengers aren't always confident that they're managing to find the best ticket available for their journey. This chimes with the findings of other research we have done. We know that passengers find the ticket purchasing experience complex and uncertain and that more transparency is needed.

While people appreciate and take advantage of the ease of booking online this can still be undermined by the ticket issuing and checking processes, which are viewed as slow and 'clunky'. Passengers want a seamless ticketing experience from planning their journey right through to arriving at their destination.

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

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

## **Stations**

Although InterCity West Coast manages a relatively small number of stations, passengers are still influenced by their experience at these entry, interchange and exit points of the rail network. There is widespread acknowledgement of recent investment and resulting improvements, particularly at major stations. The increased choice and better quality of food, drink and retail outlets is appreciated.

However charging for toilets, especially when they often aren't as clean as desired, is seen as unacceptable - especially when passengers have paid, often a lot of money, for a train ticket.

There is thought to be room for improvement at some of the smaller stations, which can feel rather neglected and forlorn.

Passengers with disabilities tell us that arriving at and navigating through the station is the most difficult part of their journey. The key issue in this respect is the assistance that is on offer, which is variable in both availability and quality.

Euston is considered to have particular problems with crowd management. The 'scrum' on the concourse as everyone watches the departure boards, the short time between platform announcement and departure, and the time-consuming pre-boarding ticket checks are all felt to contribute. Passengers describe the experience as stressful and unpleasant. Smarter ticketing, better station design and more intelligent scheduling are considered priorities to improve the situation at Euston.

NRPS scores show only 68 per cent satisfied with the overall station environment compared to the sector average of 79 per cent.

## **On-board experience**

Overall the experience on board is a positive one. Trains are fairly modern, although the lack of sufficient power points is an issue, and they seem to compare well against competitors. Generally people feel comfortable, safe and secure.

Although the passengers in this study, many of whom travel on advance tickets with reservations, usually get a seat themselves, they did have experience of travelling on congested trains. They feel that overcrowding is largely unacceptable and demonstrates a lack of care on the part of the train company.

While NRPS shows that eight in ten passengers are satisfied with the room to sit and stand, our priorities research found that 'passengers always able to get a seat on the train' is top of the list for improvement for customers on the InterCity West Coast.

Three areas of the on-board experience were consistently raised as requiring particular attention: luggage, toilets and Wi-Fi.

Space for luggage is considered to be limited, with overhead racks often too small. The necessity to store larger bags in the racks at the end or middle of the carriage is often a significant cause for concern. Passengers do not want to be parted from their personal belongings and this creates anxiety.

It is also seen as difficult to manage luggage or buggies because of narrow aisles and limited space. Inability to move freely through the train can contribute to perceptions of overcrowding. InterCity West Coast NRPS scores for satisfaction with space for luggage are just above the sector average at 59 compared to 57 per cent.

The majority of passengers have a basic expectation that good-quality, free Wi-Fi should be provided. The current quality of the Wi-Fi service is seen as variable and unreliable, by both paying standard class passengers and those receiving the complimentary service in first class. Negative comparisons are made against retail, hospitality and other transport environments where even a small, inexpensive purchase often entitles you to free Wi-Fi. Research into passengers' priorities for improvement showed that 'free Wi-Fi available on the train' is the fourth priority for InterCity West Coast passengers, much higher than the national sample in which it was tenth.

NRPS shows that satisfaction with toilet facilities is higher on InterCity West Coast than the long-distance sector average, with scores of 60 per cent and 52 per cent respectively.

Nevertheless, this research identified toilets, and in particular their cleanliness, as a concern for passengers. People feel that toilets start off clean but deteriorate during the journey and a lack of on-board cleaning means they can be in a poor state later on. Unpleasant smells in toilets and corridors are a source of complaint.

Although some passengers like the spacious toilets with electronically closing doors, the mechanism to open and close these can be confusing and is a source of anxiety for some.

### **Customer service and staff**

Passengers feel that staff play a key role in delivering a truly enhanced service. This underpins all aspects of the InterCity West Coast experience and is an area that could be further improved. They believe that staff need to embody and personify a wider brand commitment to the customer through taking ownership, being proactive and being empowered.

Station staff are considered to be helpful when approached. However, they are not sufficiently visible and proactive. There can be confusion over which staff do what. There is a need for staff at stations to be more obviously ready to help and for it to be clear that they are there to provide customer service.

Staff on trains are viewed as friendly, helpful and approachable. They are generally thought to be better than station staff. However, increased visibility, especially on later/quieter services is desired and would provide reassurance. There is a concern among some passengers that it would be difficult to summon staff to help if it was required.

These broadly positive findings about staff attitude are reflected by the NRPS, which shows satisfaction with the helpfulness and attitude of station staff at 81 per cent. This is just under the sector average of 83. For staff on the train, satisfaction with this factor is at 82 per cent, just above the sector average of 81.

However, scores for availability of station staff are lower, with the operator scoring 69 per cent against a sector average of 73 per cent. On board the satisfaction with availability of staff is 65 per cent, matching the sector average exactly.

### **Loyalty**

In retail, and in other travel environments such as airlines, customer reward programmes are now the norm. Passengers feel that rail is lagging behind and want to see their loyalty rewarded. The key priorities are to have an inclusive, individually tailored offer with something for everyone, and which delivers something of genuine benefit to people. There is low awareness of any existing schemes.

This chimes with findings of our 2014 research, *Passengers' relationship with the rail industry*. This found that most passengers had low 'trust in relationship' with their train operator (although Virgin Trains was second from top). It also found that once a reliable service is established as a foundation, it is possible to create higher levels of trust through building closer relationships with customers. Loyalty schemes present an opportunity for the operator to get to know their customer better and offer them the personalised service they desire.

## What next?

Our aim is to ensure that the interests of passengers are placed at the heart of the next InterCity West Coast 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 DfT as it develops the specification, a formal response to the Government's consultation during 2016 and discussions with bidders as they shape their proposals.

A full report from Illuminas is available on our website. Illuminas carries out 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 be found on the Transport Focus website ([www.transportfocus.org.uk](http://www.transportfocus.org.uk)). For specific information about franchising please see: <http://www.transportfocus.org.uk/franchising>.

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