



Designing our passenger-led future transport system

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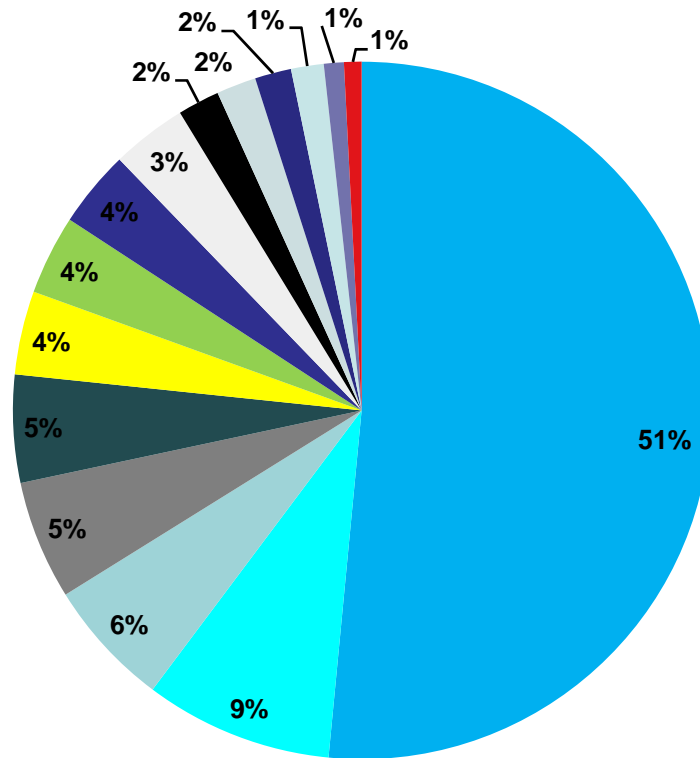
What are passengers telling us?



National Passenger Survey Autumn 2008

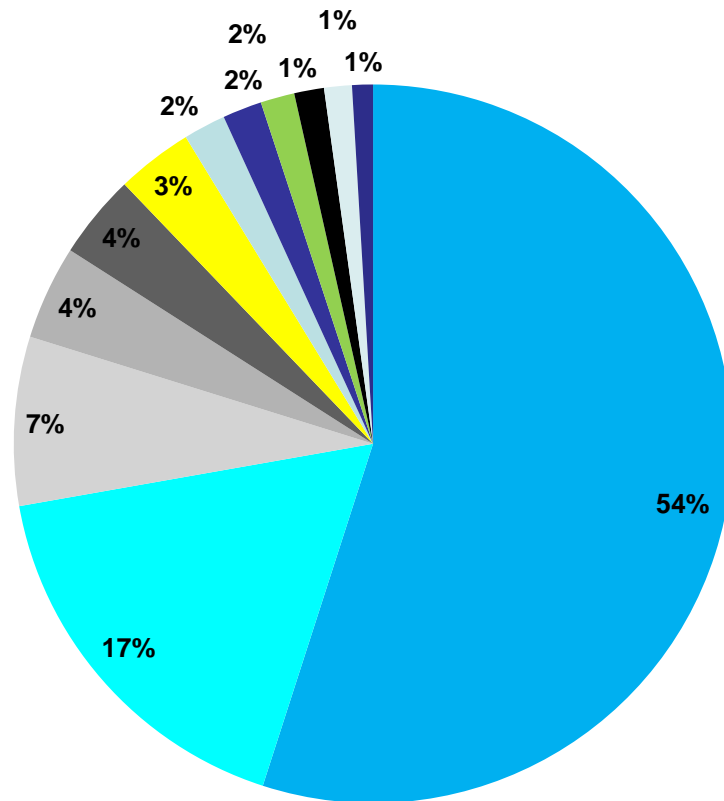
- Overall satisfaction was 83%
 - Women give better ratings than men
 - Older passengers better ratings than younger
 - Commuters give the worst ratings, then business travellers, then leisure travellers who give the best
- Satisfaction with punctuality (81%) has shown good recent improvement
- Highest scores:
 - journey time (84%), how a request to station staff was handled (84%)
- Lowest ratings:
 - dealing with delays (37%), availability of staff on train (40%) and train toilet facilities (36%).

Drivers of satisfaction – Autumn 08



- Punctuality/reliability
- Journey time
- Frequency of trains
- Personal security at station
- Ease of getting on/off train
- Sufficient room to sit/stand
- Cleanliness
- Comfort of seating
- Value for money

Drivers of dissatisfaction – Autumn 08



- How train company dealt with delays
- Punctuality
- Journey time
- Room to sit/stand
- Ease of getting on/off the train
- Request to station staff
- Cleanliness of train
- Connections other train services
- Personal security at station

Passenger priorities for improvement



Top priorities:

1. Value for money fares
 2. Frequency of services
 3. Punctuality
 4. Able to get a seat
 5. Information on delay
- Very similar priorities for all groups of passengers.

Source: Passengers' Priorities for improvements in rail services. Passenger Focus study 2007

Quality of current information provision

Normal service

- Information across all media (i.e. websites, staff, telephone, visual signage and screens and audio announcements) is on the whole considered good, accurate and reliable

Times of disruption

- Information quality through all media considered poor – especially a lack of up to date information.
- Staff often not well informed!

At times of disruption, an expectation of:

- timely information that identifies the extent of the interruption; and
- clear, relevant and trustworthy information on alternative travel options (including advice on alternative routes and/or bus services availability)

Traditional and technology solutions

- Staff presence considered extremely important medium for providing information and reassurance
 - **BUT** staff can only help when have access to the relevant, up-to date information
- ‘Traditional’ staff-centred information and ‘hi tech’ channels are equally important, and complementary
 - **CONCERN** that reliance on technology could lead to down-scaling of customer-facing staff and/or their information-providing function
- Demand from passengers, and enthusiasm for technological developments, especially through SMS text services
 - **BUT** lack of awareness of the currently available services

Railway culture – look like you care

- The timetable is the industry's promise to its customers
 - Does the industry look like it cares?
 - E.g. Stuttgart – “Your train is one minute late”
- Passengers need to know you care
 - Obey the 2-minute rule
 - Provide live-running information on in-train customer information systems
 - Make an announcement even for ‘on the move’ delays

Quality of information – a people issue

- Passengers need speedy information
 - E.g. Inbound expected arrival means outbound departure will be late but passengers not yet told
- Consistency of information
 - NRES v TOC Customer Information Systems
 - Announcements v Customer Information Screen

Fares and Ticketing Study: Conclusions – commuters

The key drivers of value for money for commuters are:

- Price
- Punctuality and cancellations
- Space to sit or stand
- Communications (particularly at times of service disruption)

Annual fares are at the limit of what people can be expected to pay. Fares are already significantly higher than elsewhere in Europe.

- Wigan/Blackburn into Manchester is 60% more expensive and Liverpool/Preston into Manchester twice as expensive as the equivalent journeys into Paris

We cannot keep shifting more and more cost to passengers for, broadly, the same service as the year before.

Fares and Ticketing Study: Recommendations – commuters

Delivering value for money satisfaction in the long run will require even greater focus on:

- train performance
- delivering extra capacity
- communications with passengers during disruption

However, the following **will** help:

- Spreading the cost of a season ticket over 12 monthly instalments – e.g. direct debit scheme
- Meaningful loyalty schemes that show season ticket holders that train companies value them
- Discounts for people commuting regularly, but less than five days a week (e.g. ten trips for the price of eight)

Fares and Ticketing Study: Conclusions – long distance

- Britain has among the cheapest long distance fares – if you can get them and don't need flexibility
- Britain has the most expensive long distance fares – with the latter (e.g. £230 Euston to Manchester) dominating perception
- Fares for long distance travel are regarded as illogical, lack transparency and passengers mistrust the system. It is perceived by some as designed to make you pay more.
- For many people (e.g. students, families) the long distance railway is already an EasyJet railway – they cannot afford to travel by train at short notice when the cheapest tickets have sold out
- Research amongst employers shows concern that flexibility comes at such a high price

Fares and Ticketing Study: Recommendations – long distance

- That the industry be asked to develop a long-distance fares structure that, while delivering broadly the same or increased revenue:
- Feels logical to passengers (e.g. no “two singles might be cheaper than a return”)
- Is transparent in the way it operates (particularly regarding quota-controlled Advance Purchase tickets)
- Displays the cheapest through-ticket return price to the most popular destinations at the station
- Allows Advance single tickets to be purchased up until at least midnight the day before travel
- Moves to a system where, if you miss your train, you pay the difference between what you have paid already and the appropriate walk up fare for that train (less a reasonable fee)

The passenger experience

- **Disproportionate costs for flexibility**
 - Yield management doesn't have to mean no flexibility – look at Eurotunnel
 - If the train isn't full but the costs of switching my ticket are too high, the train company is losing out too
- **Numerous examples of unfair pricing**
 - Two singles cheaper than a return
 - Through fares that can be undercut
- **Lack of transparency**
 - Time restrictions not printed on the ticket or available at the ticket machine
 - Advance ticket availability not clear

Can the industry sort this out?

- Confusion and misperceptions of higher prices are rife
- This is not a revenue-maximising situation
- So the industry loses out too
- Sorting it out requires better co-ordination, sharper market research
- Seems like it's all in the too difficult box
 - Previous policy plus/minus a few minor changes





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