Passenger Focus response to the rail industry's Initial Industry Plan for England and Wales in Control Period 5, 2014-19

November 2011

Passengerfocus
putting passengers first

Passenger Focus – who we are and what we do

We are an independent public body set up by Government to protect the interests of Britain's rail passengers, England’s bus and tram passengers outside London and England’s coach passengers on scheduled domestic services. We are a non-departmental public body sponsored by the Department for Transport (DfT).

Our mission is to get the best deal for passengers. With a strong emphasis on evidence-based campaigning and research, we ensure that we know what is happening on the ground.

We use our knowledge to influence decisions on behalf of passengers and we work with the industry, passenger groups and government to secure journey improvements.

Contents

1. Introduction

This document provides Passenger Focus's response to the rail industry's Initial Industry Plan (IIP) for England and Wales in Control Period 5 (CP5), 2014-19, while the appendix reproduces our submission to the rail industry's Planning Oversight Group during that body's development of the IIP.

Passenger Focus welcomes publication of the rail industry's IIP for England and Wales for CP5, and is supportive of what it would deliver for passengers on top of the much-needed investment already announced in terms of Crossrail,Thameslink Programme, the Intercity Express Programme and electrification of the Great Western and routes in North West England. The very fact that the IIP represents the rail industry planning together, rather than separately as individual businesses, is a welcome advance on planning for Control Period 4. It must be noted, however, that the IIP is predicated on the industry achieving the efficiencies identified in Sir Roy McNulty's Rail Value for Money Study[1], continuing above-inflation fare increases, a more liberal franchising model and a £260 million increase (over what would otherwise be required) in government funding for the railway. These cannot be taken as read and passengers must expect these plans to change.

While acknowledging the wider economic and financial situation, Passenger Focus is concerned about its assumption of continuing above-inflation fare increases and significant reductions in the number of passenger-facing staff. Neither of these will be popular with passengers and we comment further about them in this document. While acknowledging the challenge of costing a specific target for a measure based on passenger perception, Passenger Focus is disappointed that the IIP talks only of an "ambition to achieve 90% customer satisfaction in the longer term", but is then unambitious about improving punctuality – the very thing that would do most to increase passenger satisfaction.

In our response we also comment about the IIP as it relates to the following:

- frequency
- crowding
- ticketing and retailing
- transparency
- the proposed Control Period 5 funds, including those for stations and improving accessibility
- journey time
- carrying out engineering works in the least disruptive way
- train cleaning.

Passenger Focus looks forward to further discussions with the rail industry, its regulators and Government about the issues raised in this response. In particular, in those areas where we believe the plan needs to be developed further if it is to fully deliver against passengers' priorities for improvement.

[1] http://assets.dft.gov.uk/publications/report-of-the-rail-vfm-study/realising-the-potential-of-gb-rail.pdf

2. The IIP and passengers' highest priorities for improvement

Passenger Focus research[2] has found that passengers' top five priorities for improvement are:

- value for money
- punctuality
- frequency
- crowding
- information during disruption

2.1 Value for money

The IIP was published three months before passengers face the largest increase, at 8% on average and up to 13% for some, in regulated fares since privatisation. To be followed by two more years of Retail Prices Index (RPI) plus 3% increases, and this is at a time when many passengers' income will not keep pace even with RPI.

Many fares are already high in comparison with other European countries

Commuters in Britain, particularly to London, already pay significantly higher fares – in real terms – than their counterparts elsewhere in Europe (annual season ticket prices to London in the 17km-40km bracket are 1.88 times the next most expensive country, France)[3]. There is also the high price of flexibility for many passengers, with Anytime single tickets being up to ten times the price of the cheapest 'one train only' Advance single.

Continuing above-inflation fare increases

While acknowledging the wider economic and financial situation, Passenger Focus is concerned that the IIP is built on the assumption of continuing above-inflation fare increases year on year between 2014 and 2019, something we believe is unsustainable and which the previous Secretary of State for Transport signalled his desire to end[4]. Relentless above-inflation fare increases throughout CP5 (coming on top of the inflation+3% increases between now and 2014) appear to be incompatible with the IIP's sustainable development principle "putting rail in reach of people", in which it being 'affordable' is one of the criteria.

The price passengers are expected to pay to use the railway is key to their assessment of value for money. But the quality of what you get for your money is also an important part of the equation. In particular punctuality, crowding, information during disruption, journey speed and train cleanliness.[5] Three of these are among passengers' top five priorities for improvement, covered immediately below, while the remainder are discussed in Section 3 of the document.

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[2] Passengers' priorities for improvements in rail services, Passenger Focus, August 2010 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=4476

[3] Fares and Ticketing Study (Page 14), Passenger Focus, February 2009 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=2526

[4] Rt. Hon. Philip Hammond MP's address to National Rail Conference, 28 June 2011 http://www.dft.gov.uk/news/speeches/hammond-20110628

[5] Fares and Ticketing Study (Page 10/11), Passenger Focus, February 2009 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=2526

2.2 Punctuality

Punctuality is the principal driver of overall satisfaction

Passenger Focus has demonstrated, through analysis of the National Passenger Survey (NPS), that punctuality and reliability of train services is the top driver of overall passenger satisfaction. Figure 1 on Page 19 of the IIP illustrates how, at 48%, punctuality and reliability dwarfs all other factors. As shown above, improving punctuality is the second highest priority among passengers.

The importance of right time arrival

Passenger Focus has also demonstrated, again through analysis of NPS data, the importance of 'right time' arrival[6] in determining passenger satisfaction[7]. This analysis mapped passenger satisfaction with punctuality against the actual delay experienced by 12,000 NPS respondents (using rail industry 'bugle'[8] data for the train on which they were travelling) and showed that:

- passenger satisfaction with punctuality declines on average by between one and three percentage points per minute of delay
- commuter satisfaction with punctuality declines on average by around five percentage points per minute of delay.

While the rail industry may struggle with the notion that commuters become aware of delay from the very first minute, the sample size was large and the linear relationship between 'right time' arrival and satisfaction with punctuality strong.

One in 14 trains (7%) will still be over five minutes (or over 10 minutes) late by 2019

Passenger Focus supports the IIP's focus on improving the punctuality and reliability of those services that currently perform least well – and on improving the industry's performance on the worst days. We acknowledge the 'more trains on an already crowded railway' argument, but the fact remains that the IIP proposes that by 2018/19, on average, 93% of trains are less than five minutes late (or for long-distance services less than ten minutes late). It is questionable whether this very modest improvement on the 92.6% required by 2013/14 is "largely sufficient to deliver high levels of customer satisfaction", as the IIP suggests.

No 'right time' trajectory

Despite its clear role in driving passenger satisfaction, the IIP does not propose a trajectory to improve 'right time' punctuality over the course of CP5, either as a formal regulatory metric or as an internal operational target. This appears to be incompatible with progress towards the industry's stated ambition of 90% customer satisfaction in the longer term. Passenger Focus fully understands that getting every train to arrive 'right time' every day would be next door to impossible. But we are keen to engage in debate about how the industry can give greater focus to 'right time' punctuality in CP5, including time-keeping at intermediate stations as well as at a train's destination.

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[6] 'right time' arrival meaning a train arriving at precisely the time printed in the timetable rather than during a 'grace period' of up to five or 10 minutes late

[7] Improving Punctuality for Passengers, Passenger Focus, January 2011 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=4966

[8] Bugle is a rail industry database containing historic train running information

2.3 Frequency

The industry must keep firmly in mind that our research shows train frequency to be the third highest priority for improvement among passengers. The table below shows passenger satisfaction with frequency on three passenger franchises, highlighting that at weekends satisfaction is markedly lower than on weekdays. The fact that the market likes high frequency is illustrated by the IIP's own Figure 6, Page 31, illustrating that off-peak in London and the South East the additional revenue earned from a fourth train per hour can outweigh incremental costs. Passenger Focus acknowledges the trade off between frequency and performance, but the importance of frequency to passengers must not be overlooked if the industry is tempted to reduce services in its quest to cut costs and increase average loadings per train.

Satisfaction with frequency of service (% fairly or very satisfied)[9]			
	Intercity West Coast (2010)	**Intercity East Coast (2009)**	**Greater Anglia (2010)**
Weekday	87%	84%	73%
Saturday	81%	73%	43%
Sunday	68%	65%	27%

2.4 Overcrowding

Passenger Focus welcomes the IIP's proposals for additional capacity in Leeds, Liverpool, London, Manchester and Sheffield, on top of the expansion that is being delivered through Crossrail, Thameslink Programme, Great Western and North West England electrification, the Intercity Express Programme and the capacity elements of the High Level Output Specification (HLOS) for Control Period 4 (CP4), 2009-2014. The document rightly acknowledges that while Thameslink Programme and Crossrail will result in significant additional capacity to and from central London, there are many other routes in London and the South East where, without additional capacity, overcrowding will be a major problem by 2019.

Average load factor will still by high in 2019

Even after these welcome proposals have been implemented, the average load factor by 2019 in the high peak hour between 08:00 and 09:00 arriving in Birmingham, Leeds, Liverpool, London, Manchester and Sheffield will be at or above 70% on average. It is important to note that 70% average capacity utilisation broadly equates to 100% seat occupation on average, with the likelihood of significant numbers of standing passengers on particular trains. Passenger Focus urges the rail industry to focus hard on reducing the cost of incremental increases in capacity to strengthen business cases for further investment in capacity to satisfy demand to commute into Britain's principal cities by train.

Peak capacity into Britain's provincial towns and cities

It is clearly appropriate for the industry to focus on capacity into Britain's principal cities. However the IIP does not appear to offer relief for passengers commuting into provincial centres, where current capacity is often inadequate (perhaps being a single 08.00-09.00 AM arrival, operated by a one or two coach train). It is disappointing that the IIP does not set out the industry's strategic thinking about opportunities arising from electrification-related diesel fleet cascades within CP5. Is there an opportunity to crack the

[9] Research undertaken by Passenger Focus to inform its submissions regarding the specification of these franchises

"one extra coach for an hour in the morning and an hour in the evening" problem in a way that gives a positive business case to properly serve existing and predicted demand?

Capacity to and from London Paddington

Finally in this section, a question. The 'top ten' list of most overcrowded train services in London and the South East for Autumn 2010[10] shows all 10 being trains, to or from London Paddington. Given that Paddington is not mentioned in the list of CP5 schemes, given on Page 136 of the IIP, is it the case that Crossrail, the Intercity Express Programme and Great Western electrification fully address the capacity needs to and from Paddington until 2019?

2.5 Information during disruption

How the rail industry handles service disruption, of which information is a key part, is a high priority for improvement among passengers. As Figure 2 on Page 20 of the IIP shows, it is also the top driver of overall dissatisfaction within the National Passenger Survey. Passenger Focus therefore welcomes inclusion of a section of the IIP entitled "Improving the customer experience", of which the Customer Information Strategy is a key component. We support the proposed vision for passenger information, which is closely related to that developed in 2008 following passenger research undertaken by Passenger Focus in partnership with National Rail Enquiries[11]. The focus on accuracy and consistency is welcomed, as is acknowledgement that staff behaviours and responsiveness to passengers' needs have a crucial part to play.

The IIP highlights that significant investment will be required in CP5 to implement the strategy, but is silent about how success will be measured. Passenger Focus believes that there should be an accompanying passenger-centric measure to demonstrate progress in improving passenger satisfaction in return for the investment made.

[10] Department for Transport, 11 August 2011, http://www.dft.gov.uk/publications/overcrowded-train-services

[11] Passenger information: a vision, Passenger Focus, 2008 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=1785

3. The IIP and other passenger priorities

3.1 The value of passenger-facing staff

The IIP assumes that the efficiencies identified by Sir Roy McNulty's study are realised, which may or may not prove possible. But in any case it is highly questionable whether reducing the number of front-line staff is desirable. There is the fact that many passengers wish to buy a ticket from a human being and not a machine, in part because they need guidance and reassurance that a machine cannot deliver. Irregular passengers often need to reassure themselves that they are about to get on the correct train, let alone require assistance when services are disrupted. Passengers tell us that lack of staff on stations and on trains is a key reason why they are concerned about personal security when travelling by train. Lack of staff is second only to anti-social behaviour by others, which cannot be effectively checked on a de-staffed railway. When asked what three things would help them feel safer when travelling by train, passengers said "not allowing rowdy or drunk people to board the train", "more rail staff visibility on trains" and "more police visibility on trains".[12] In summary, our research suggests that passengers do not want a self-service, never-anyone-to-help-you railway. Driving genuine efficiencies is one thing, cutting staff who add value to the product passengers are buying is entirely different.

3.2 Ticketing and retailing

The IIP anticipates that the trend towards self-service ticket purchase will continue, and acknowledges that "there is a need to focus on improvements to some retail channels, such as Ticket Vending Machines (TVMs)". Yet it is unclear from the IIP what the industry actually proposes to do in CP5. Where are the specific plans to tackle the deficiencies with TVMs and internet purchase that Passenger Focus has highlighted in its research?[13] [14] What will be done in CP5 to help ensure passengers buy the right ticket – and that they are confident that they have done so?

3.3 Transparency

Passenger Focus research, undertaken jointly with the Office of Rail Regulation has shown that passengers wish to have greater transparency of rail industry performance.[15] We believe that the industry must give a clear indication that it will move as quickly as possible to a situation in which passengers can access more information about their trains.

If a passenger wishes to understand the punctuality record of the particular trains they use, the industry should make those data available – including the punctuality record at intermediate stations, if that is what they want to know. If passengers want to know the 'right time' punctuality of their trains, that information should be available to them. The vast majority of these data are collected automatically as a matter of course – making them available would not be a huge additional cost to the industry. Similarly, it should be possible to access information about train cancellations and short-formations. And to the extent that reliable data exist, a passenger wishing to understand whether the 08.10 or 08.20 offers a greater chance of getting a seat, then the information should be available. A passenger should be able to see how their station scores for service quality, e.g. if the ticket office has been open when it should

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[12] Anti-social behaviour: Rail passenger views, February 2010 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=3629

[13] Ticket Vending Machine Usability, Passenger Focus, July 2010 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=4460

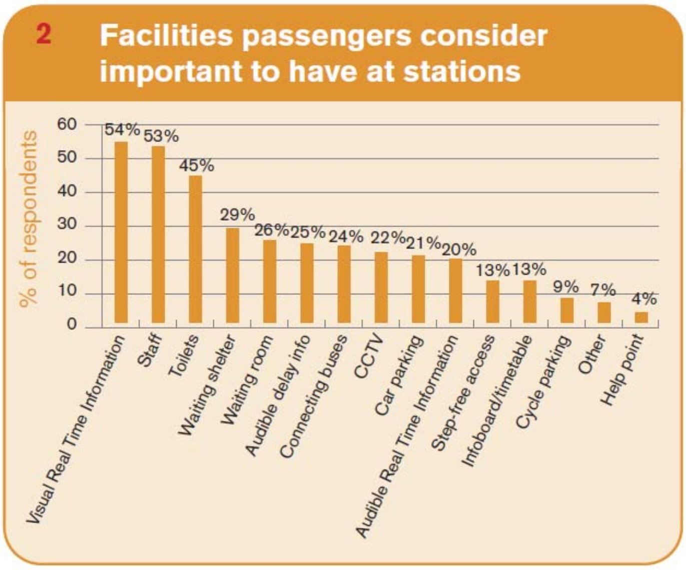
[14] Ticket Retailing Website Usability, Passenger Focus, June 2011 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=5194

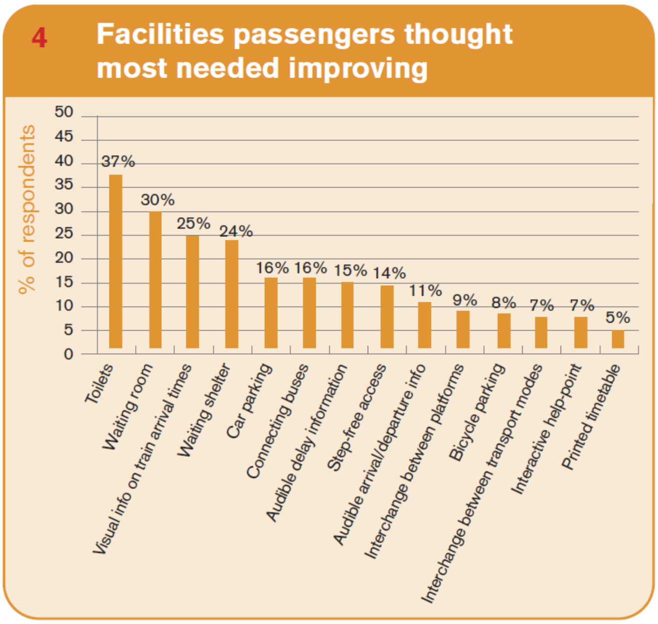
[15] Putting rail information in the public domain, May 2011 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=5166

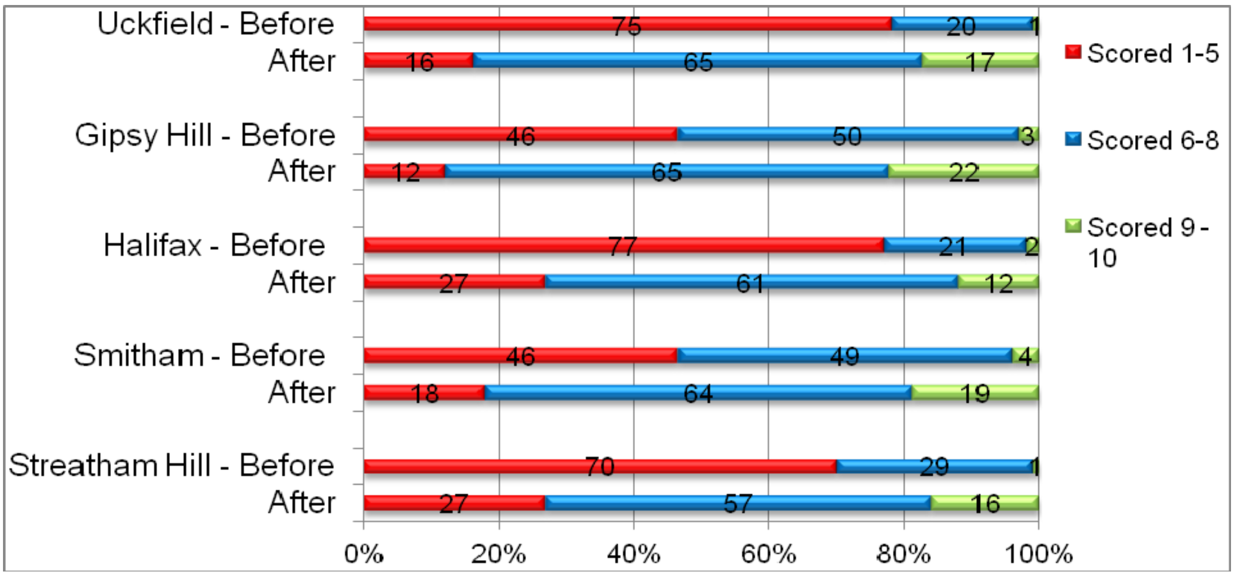
be. Passenger Focus does not believe that greater transparency should be viewed by the rail industry as a threat. On the contrary, visibility of how good or otherwise particular parts of network are should be seen as invaluable information to ensure that managers focus attention on the right areas.

3.4 Proposed Control Period 5 funds

Passenger Focus supports the proposed retention of the National Stations Improvement Programme (NSIP) fund and of a fund designed to improve station accessibility. Investment in stations is noticed by passengers, as illustrated below by research undertaken before and after NSIP work was carried out at a number of stations in CP4. However, we wish to see governance arrangements strengthened to ensure two things. First, that works financed through these funds are truly additional to those the industry is required to deliver under existing maintenance, renewal and operational obligations. Second, that the schemes funded focus closely on those aspects that passengers see as the greatest priority to improve, as illustrated below[16].







Scale of 1 to 10 where: 1 = Very dissatisfied and 10 = Very satisfied

[16] National Station Improvement Programme, benchmarking and improving passenger satisfaction with stations, December 2009 http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=3495

3.5 Journey time

Reducing journey times does not show as a particularly high priority for improvement among existing passengers, partly because existing passengers are sufficiently content with the status quo to be making the journey. However, the IIP notes that demand forecasting over many years has shown that journey time matters in the market place, and it suggests that a fund be created to deliver a number of specific schemes.

Creating a hunger for continual incremental improvement in journey times

Passenger Focus welcomes the proposed schemes, but we note that there are many deserving cases not on the list - e.g. London-Colchester-Ipswich-Norwich and Liverpool-Manchester-Sheffield-Nottingham-Peterborough-Norwich. However, we challenge the industry to go further. How could incentives be introduced to create a hunger for continual incremental improvement in journey times? Ought not the default position be that renewals on every route will, over time, allow train operators to exploit the acceleration and top speed performance of the rolling stock in use? Should not an efficient infrastructure supplier be expected to enhance his product over time without requiring additional funding?

The industry must break out of the paralysis in which signalling is renewed for existing line speed because of the capability of the track, and the track is subsequently renewed at existing line speed because of the capability of the signalling (or vice versa). The bureaucracy and costs involved in increasing speed even when little or no change is required to the infrastructure or maintenance arrangements must be tackled. The fact that the line speed for Leeds to Carlisle Class 158-operated 90mph trains is 80mph, despite the large sums spent on renewing the Settle and Carlisle infrastructure in recent years is an illustration of the problem.

3.6 Engineering works – avoiding the use of replacement buses

Passenger Focus supports the intention to build on the route categorisation principles developed in CP4 that on key routes passengers will be transferred to a replacement bus only if there is no practical alternative. Through the development of the Route Network Availability Strategies, Passenger Focus will continue to highlight a number of key omissions from the original list, including:

- Cardiff-Swansea
- Liverpool-Manchester-Sheffield
- London-Chelmsford-Colchester-Ipswich-Norwich
- London-Hull
- London-Portsmouth
- London-Southend.

As noted in the IIP, Passenger Focus will contribute to discussions about development of revised ‘network availability’ metrics for CP5. Our principle requirements being that they reflect the impact of engineering works on passengers and that it is possible to measure impacts by individual route. A specific challenge to the industry is that routine maintenance of the railway, as distinct from renewals and enhancements, should be eliminated during CP5 as a ‘permitted reason’ for breach of route categorisation principles.

The IIP notes that there is a relationship between the cost of maintaining and renewing the network and keeping the railway open for passengers. It is crucial that in any debate about reducing costs the needs of passengers are considered, and that the industry properly understands the revenue loss and costs associated with running buses in lieu of trains.

3.7 Train cleanliness

The IIP notes that train cleanliness is an important driver of overall satisfaction. It is also an important factor in passengers' assessment of value for money. However, the IIP simply states "train cleanliness is an important quality factor which is generally managed by train operators as part of their franchise obligations." This appears to suggest that the industry does not believe train cleaning is a matter for the IIP. Passenger Focus finds that surprising, given that the standard which can be achieved is closely linked to investment at locations where trains are stabled (e.g. with platform-height walkways, lighting, water, drainage allowing appropriate detergents to be used, electricity for vacuum cleaners, vehicle access for steam cleaning machines etc.). This is an area in which the IIP appears weak on proposals that support the ambition to reach 90% passenger satisfaction.

APPENDIX:

Passenger Focus submission to the rail industry's Planning Oversight Group during that body's development of the IIP for England and Wales

Passenger priorities and drivers of satisfaction England and Wales

Contents

1. Introduction

The Initial Industry Plan (IIP) will set out the rail industry's strategy and advice for the development of the 2013 Periodic Review and the setting of the High Level Output Specifications (HLOS) for England and Wales and for Scotland.

Passenger Focus has undertaken a wide range of research looking at passengers' aspirations and attitudes – much of which centres on measuring passenger satisfaction and understanding priorities for improvement and so is ideally suited to help inform the IIP.

The industry's Planning Oversight Group (POG) has asked Passenger Focus for an analysis of passengers' needs, with particular emphasis on identifying:

- current levels of passenger satisfaction;
- the drivers of passenger satisfaction; and
- passengers' priorities for improvement and factors influencing this.

The following summarises Passenger Focus' research on these issues at an England and Wales level. It is intended more as an analytical submission setting out the conclusions from the research rather than an exposition of Passenger Focus's policy on these issues. These wider views will be set out in Passenger Focus's own submission to the Department for Transport (DfT) and Office of Rail Regulation (ORR) as part of the Periodic Review / HLOS process.

2. Passenger satisfaction

Passenger Focus consults over 50,000[17] passengers a year to produce the National Passenger Survey (NPS) - a network-wide picture of passengers' satisfaction with rail travel.

Passenger opinions of train services are collected twice a year from a representative sample of journeys. This covers overall satisfaction (with the journey and the station) as well as 30 other station and train criteria. NPS is a long-running survey so results can also be compared over time.

This section looks at existing levels of passenger satisfaction and trends over time. It assesses satisfaction at an England/Wales aggregate level as well by industry sector and journey purpose. [NB. All figures exclude non-franchised operators and Scotrail unless otherwise stated].

[17] In the 2010-11 year a total of 57,652 passengers returned questionnaires

2.1 Overall satisfaction

NPS asks passengers for their overall satisfaction with their journey. Over the last 10 waves (five years) we see a broadly upward trend.

Table 1: Overall passenger satisfaction (NPS)

England and Wales (franchised operators)	Autumn 2006	Spring 2007	Autumn 2007	Spring 2008	Autumn 2008	Spring 2009	Autumn 2009	Spring 2010	Autumn 2010	Spring 2011
Overall Satisfaction (%)	80	78	80	80	82	81	83	83	83	84

NPS uses a five-point scale ranging from very satisfied to very dissatisfied. Looking at overall satisfaction by each of these categories shows that the number of passengers who are very satisfied is increasing balanced by a slight but steady reduction in those who are undecided and dissatisfied

Table 2: Overall passenger satisfaction (NPS) – % satisfied and dissatisfied

England and Wales overall satisfaction (%)	Autumn 2006	Spring 2007	Autumn 2007	Spring 2008	Autumn 2008	Spring 2009	Autumn 2009	Spring 2010	Autumn 2010	Spring 2011
very satisfied	33	32	33	31	34	33	35	35	36	36
satisfied	48	46	48	49	48	48	48	47	47	48
neither / nor	12	13	12	13	11	11	11	11	10	11
dissatisfied	5	6	5	5	5	5	5	4	4	4
very dissatisfied	2	3	2	2	2	3	2	2	2	2

2.2 Overall satisfaction – station criteria

NPS also asks passengers to record satisfaction with a number of station-based criteria. As of Autumn 2010 a new question was asked to gauge overall satisfaction with stations – the inaugural results showing a 76% satisfaction rate, which has dropped to 75% for the Spring 2011 wave. Prior to this there were just scores for individual categories rather than an overall ranking.

Table 3 shows satisfaction with station attributes over the past five years. The most noticeable improvements have been with ticket buying facilities and personal security. However, satisfaction with the ‘facilities and services’ at the station and ‘connections with other forms of public transport’ show little (or no) in the way of improvement. It is noticeable that satisfaction with facilities/services also remains low in absolute terms.

Table 3: Passenger satisfaction with station criteria.

Station facilities (% satisfied)	Autumn 2006	Spring 2007	Autumn 2007	Spring 2008	Autumn 2008	Spring 2009	Autumn 2009	Spring 2010	Autumn 2010	Spring 2011
Overall satisfaction station	-	-	-	-	-	-	-	-	76	75
Ticket buying facilities	65	66	69	70	69	71	70	71	72	72
Provision of information about train times/platforms	78	76	77	77	78	77	79	78	81	79
Upkeep/repair of the station buildings/platforms	63	60	63	61	63	62	64	63	65	64
Cleanliness	69	66	69	67	69	68	70	68	71	70
The facilities and services	51	50	51	48	50	49	51	50	50	50
Attitudes/helpfulness of staff	69	68	69	67	69	68	69	70	71	70
Connections with other forms of public transport	74	73	73	72	73	74	74	74	74	74
Facilities for car parking	47	45	46	43	43	43	46	48	49	49
Overall environment	61	59	64	62	64	63	66	63	66	65
Personal security at station	59	56	61	60	62	62	64	64	65	65
The availability of staff	56	55	57	56	58	57	58	58	59	58
How request to station staff was handled	84	81	82	83	83	82	83	83	86	84

Source NPS England and Wales franchised operators

2.3 Overall satisfaction – train criteria

Satisfaction with train-based criteria is more volatile – see table 4. Overall a similar pattern can be seen as with stations - an upward trend being punctuated by some 'slower moving' criteria.

The major increases can be seen with the 'availability of staff' and 'sufficient room to sit/stand' while satisfaction with service frequency, how well the company dealt with delays and train toilets have barely moved over the five year period.

Table 4: Passenger satisfaction with train criteria (NPS). England and Wales.

Train Facilities (% satisfied)	Autumn 2006	Spring 2007	Autumn 2007	Spring 2008	Autumn 2008	Spring 2009	Autumn 2009	Spring 2010	Autumn 2010	Spring 2011
Frequency of the trains on that route	77	75	75	74	75	75	76	77	77	77
Punctuality/reliability	79	77	79	79	81	80	82	82	82	80
Length of time the journey was scheduled to take (speed)	82	81	83	82	83	83	84	84	85	85
Connections with other train services	71	68	71	70	73	72	74	75	76	76
Value for money	43	38	45	39	45	39	44	47	48	43
Upkeep and repair of the train	71	70	70	70	72	71	72	72	74	73
Provision of information during the journey	63	63	65	65	67	66	67	68	69	69
Helpfulness and attitude of staff on train	62	61	56	57	58	58	60	62	63	63
The space for luggage	47	47	48	48	49	49	50	52	53	53
The toilet facilities	36	36	36	34	36	35	37	37	38	36
Sufficient room for all passengers to sit/stand	60	58	63	61	64	65	66	67	68	67
The comfort of the seating area	67	66	67	66	68	68	69	69	72	70
The ease of being able to get on and off	75	75	77	76	77	77	79	79	80	80
Your personal security on board	69	68	70	69	71	71	73	74	75	75
The cleanliness of the inside	71	70	70	70	71	71	72	71	73	72
The cleanliness of the outside	66	64	67	65	70	68	71	66	71	67
The availability of staff	37	36	37	37	38	39	41	43	45	44
How well train company dealt with delays	36	32	35	34	37	35	35	35	39	36

Source NPS England and Wales franchised operators.

2.4 Overall satisfaction by industry sector

Analysis by industry sector reveals little difference between passengers using long distance and regional services – though satisfaction seems to have levelled out over the past few waves. Satisfaction among London and South East passengers is lower (at 83%).

Table 5: Passenger satisfaction by sector (NPS)

England and Wales Overall satisfaction (%)	Autumn 2006	Spring 2007	Autumn 2007	Spring 2008	Autumn 2008	Spring 2009	Autumn 2009	Spring 2010	Autumn 2010	Spring 2011
London & South East	80	77	80	79	82	80	82	82	83	83
Long Distance	84	87	84	83	84	85	87	87	87	87
Regional	82	82	82	82	84	84	85	86	85	86

Source NPS England and Wales franchised operators

2.5 Overall satisfaction by journey purpose

Differences in passenger satisfaction are principally differentiated by journey purpose rather than by sector, with commuters recording far lower levels of overall satisfaction than either business or leisure travellers.

Table 6: Overall passenger satisfaction by journey purpose

NPS: Spring 2011 % satisfied (England and Wales)	Overall	Commuter	Business	Leisure
Overall satisfaction	84	78	85	90

Source NPS England and Wales franchised operators

This pattern is mirrored across the full range of station attributes (Table 7) and across the on-train attributes (Table 8)

Table 7: Satisfaction with station criteria by journey purpose (NPS)

NPS: Spring 2011 % Satisfied England and Wales Station Attributes	Overall	Commuter	Business	Leisure
Overall satisfaction with the station	75	71	74	81
Ticket buying facilities	72	67	74	79
Provision of information about train times/platforms	79	75	80	84
The upkeep/repair of the station buildings/platforms	64	60	62	71
Cleanliness	70	65	69	76
The facilities and services	50	44	54	56
The attitudes and helpfulness of the staff	70	65	72	76
Connections with other forms of public transport	74	71	75	77
Facilities for car parking	49	45	48	56
Overall environment	65	60	63	72
Your personal security whilst using	65	61	66	71
The availability of staff	58	54	57	63
How request to station staff was handled	84	76	90	87

Source NPS England and Wales franchised operators

Table 8: Satisfaction with train criteria by journey purpose (NPS)

NPS: Spring 2011 % Satisfied England and Wales Train Attributes	Overall Average	Commuter	Business	Leisure
Frequency of the trains on that route	77	71	82	84
Punctuality/reliability	80	72	86	89
Length of time the journey was scheduled to take (speed)	85	80	85	90
Connections with other train services	76	72	78	82
Value for money	43	30	45	60
Cleanliness of the train	72	67	73	79
Upkeep and repair of the train	73	67	71	80
Provision of information during the journey	69	63	69	77
Helpfulness and attitude of staff on train	63	55	65	72
The space for luggage	53	49	55	57
The toilet facilities	36	28	37	47
Sufficient room for all passengers to sit/stand	67	56	73	78
The comfort of the seating area	70	63	70	78
The ease of being able to get on and off	80	74	83	85
Your personal security on board	75	70	79	81
The cleanliness of the inside	72	67	73	78
The cleanliness of the outside	67	63	66	73
The availability of staff	44	35	48	54
How well train company dealt with delays	36	27	35	52

Source NPS England and Wales franchised operators

Of perhaps most significance, however, is the size of the ‘gap’ between commuter and leisure traveller satisfaction. For instance, when it comes to value for money we see total satisfaction at 43% while commuters are 30% and leisure passengers 60%.

Table 9 compares each of the commuter, business, and leisure scores with the total. Negative scores show that satisfaction is less than the total for all passengers while positive scores show that it is higher. Of particular note are value for money, space to sit/stand and how delays are handled.

Table 9: Satisfaction by journey purpose: percentage difference from England and Wales percentage satisfied (NPS)

NPS: Spring 2011 % Satisfied	England and Wales total	Diff +/- commuter vs national	Diff +/- business vs national	Diff +/- Leisure vs national
Overall Satisfaction	84	-6	1	7
Station Facilities				
Overall satisfaction with the station	75	-5	-1	6
Ticket buying facilities	72	-5	1	7
Provision of information about train times/platforms	79	-4	1	5
The upkeep/repair of the station buildings/platforms	64	-5	-2	7
Cleanliness	70	-5	-1	6
The facilities and services	50	-6	4	6
The attitudes and helpfulness of the staff	70	-5	2	7
Connections with other forms of public transport	74	-3	1	4
Facilities for car parking	49	-5	-2	7
Overall environment	65	-5	-2	7
Your personal security whilst using	65	-4	0	6
The availability of staff	58	-4	0	5
How request to station staff was handled	84	-8	6	3
Train facilities				
The frequency of the trains on that route	77	-7	5	6
Punctuality/reliability (i.e. the train arriving/departing on time)	80	-8	5	8
The length of time the journey was scheduled to take (speed)	85	-5	1	6
Connections with other train services	76	-5	1	6
The value for money for the price of your ticket	43	-13	2	17
Upkeep and repair of the train	73	-5	-1	7
The provision of information during the journey	69	-6	0	8
The helpfulness and attitude of staff on train	63	-8	2	9
The space for luggage	53	-4	3	4

The toilet facilities	36	-8	1	11
Sufficient room for all passengers to sit/stand	67	-11	6	11
The comfort of the seating area	70	-7	0	9
The ease of being able to get on and off	80	-5	3	5
Your personal security on board	75	-6	3	6
The cleanliness of the inside	72	-5	1	6
The cleanliness of the outside	67	-4	-1	5
The availability of staff	44	-9	4	10
How well train company deals with delays	36	-9	-1	16

NB. For ease of use NPS data are reported without decimal places; however, changes are calculated using three decimal places. Rounding of the data means that results may appear to differ by one percent. For example, overall satisfaction is 83.6% (rounds up to 84%) while that for leisure passengers is 90.1% (rounds down to 90%). The apparent difference between 90 and 84 is 6% points, while the actual difference is 6.5 which is reported as 7% points.

2.6 Overall satisfaction by journey purpose – split by industry sector

Taking the commuter, business, and leisure satisfaction scores and further sub-dividing these by industry sector confirms that commuters record lower levels of satisfaction wherever they may be.

It is noticeable that satisfaction among commuters in the London and South East and regional services is virtually the same – indicating that the lower levels of satisfaction associated with commuting are not just a 'London' issue.

Table 10: Satisfaction by journey purpose split by sector [England and Wales]

NPS: Spring 2011 % Satisfied England and Wales	Overall	Commuter	Business	Leisure
England and Wales average	84	78	85	90
London and South East	83	78	85	90
Long Distance	87	82	85	90
Regional	86	77	85	91

Source NPS England and Wales franchised operators

2.7 Overall satisfaction – by service group

The analysis so far has concentrated on high-level totals. It must be born in mind, however, that satisfaction levels also fluctuate between different train companies and between the different routes within a train company. Overall averages can mask some quite significant fluctuations in satisfaction.

For instance, in NPS terms, East Midlands Trains is broken down into three ‘building blocks’: Liverpool-Norwich route, Local services and London services. We see overall satisfaction scores of 92%, 79% and 87% respectively – a spread of 13% percentage points.

Annex A contains an analysis of overall satisfaction for each of the ‘building blocks’ used to compile NPS.

2.8 Broad conclusion

The analysis above shows that passenger satisfaction is best differentiated by journey purpose rather than market sector. Commuters consistently record lower levels of passenger satisfaction than either business or leisure passengers.

3. Drivers of passenger satisfaction

Not all of the criteria measured by NPS will have equal importance in a passenger’s mind

– some things will clearly be of more importance in determining the overall level of satisfaction than others. By identifying those factors that correlate most highly with overall satisfaction it is possible to identify the main drivers of passenger satisfaction.

The following section concentrates on the drivers of overall passenger satisfaction at an England and Wales level and also by sector, journey purpose and Network Rail region. It also looks at drivers of satisfaction with value for money and what drives dissatisfaction.

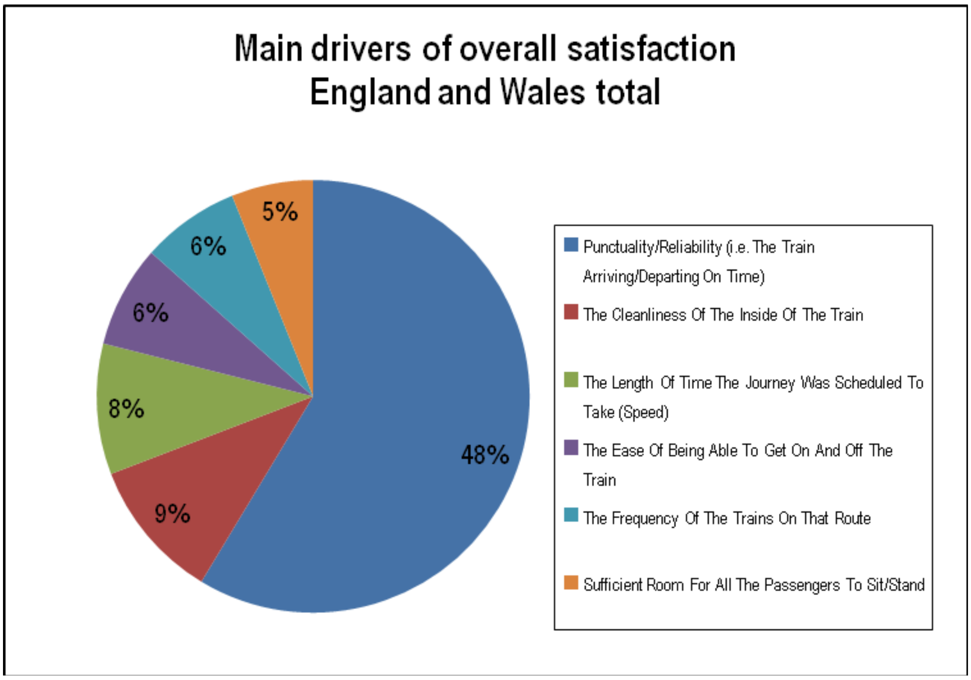
3.1 Drivers of overall satisfaction

The analysis that follows is based on a stepwise regression using the combined results for autumn 2010 and spring 2011 to improve the robustness of the results.

Chart 1 displays the main drivers of satisfaction for all passengers across England and Wales. The analysis looks at all 31 NPS criteria but for ease of presentation this has been restricted to scores of 5% or higher. [NB because of this the totals will not add up to 100%].

It is clear from this that punctuality/reliability is the biggest single contributor to overall satisfaction. It is also noticeable that the main drivers are all train based criteria – strongly suggesting that it is the journey itself that drives overall satisfaction rather than the 'station experience'.

Chart 1: Main drivers of overall satisfaction



Source: NPS Franchised operators. Spring 2011

Only shows criteria which score 5% or higher

3.2 Drivers of overall satisfaction – by industry sector

Table 11 breaks the figures down by sector as well as by total. It confirms the dominance of punctuality and of train criteria over station criteria.

Table 11: Main drivers of overall satisfaction: by total and sector

Main drivers of overall satisfaction	England and Wales total	London and South East	Long Distance	Regional
Punctuality/Reliability (i.e. The Train Arriving/Departing On Time)	48%	46%	50%	38%
The Cleanliness Of The Inside Of The Train	9%	8%	13%	22%
The Length Of Time The Journey Was Scheduled To Take (Speed)	8%	10%	6%	3%
The Ease Of Being Able To Get On And Off The Train	6%	7%	4%	10%
The Frequency Of The Trains On That Route	6%	7%	3%	3%
Sufficient Room For All The Passengers To Sit/Stand	5%	4%	5%	10%
The Overall Station Environment	4%	5%	5%	6%
The Value For Money For The Price Of Your Ticket	3%	3%	4%	6%

NPS: Autumn 2010 and Spring 2011 combined. England and Wales franchised operators

Only shows criteria which score at least 5% in any one sector

3.3 Drivers of overall satisfaction - by journey purpose

Table 12 looks at overall satisfaction by journey purpose. While punctuality still dominates it is less of a driver of satisfaction for leisure passengers than it is for commuters. Likewise we see cleanliness of the inside of the train becoming a big driver of satisfaction for leisure passengers (22% compared to just 5% for commuters) while speed of journey is higher for commuters.

Table 12: Main drivers of overall satisfaction: by total and by journey purpose

Drivers of overall satisfaction	England and Wales total	Commuter	Business	Leisure
Punctuality/Reliability (i.e. The Train Arriving/Departing On Time)	48%	49%	45%	38%
The Cleanliness Of The Inside Of The Train	9%	5%	13%	22%
The Length Of Time The Journey Was Scheduled To Take (Speed)	8%	12%	5%	6%
The Ease Of Being Able To Get On And Off The Train	6%	9%	4%	5%
The Frequency Of The Trains On That Route	6%	5%	5%	6%
Sufficient Room For All The Passengers To Sit/Stand	5%	5%	5%	4%
The Overall Station Environment	4%	4%	4%	5%
Provision Of Information About Train Times/Platforms	2%	2%	5%	3%

NPS: Autumn 2010 and Spring 2011 combined. England and Wales franchised operators

Only shows criteria which score at least 5% in any one sector

3.4 Drivers of overall satisfaction – by journey purpose and sector

Tables 13-15 show the drivers of satisfaction for commuters, business and leisure passengers split by again by industry sector.

While there is a large degree of conformity among commuters regardless of sector we do see journey time and frequency being more of a factor in the London commuter market, while cleanliness of the inside of the train is much more prominent for regional commuters.

__Table 13: Main drivers of overall satisfaction for commuters – split by sector__

	Commuter		
	London and South East	Long Distance	Regional
Station Factors			
The Overall Station Environment	5%	4%	4%
Train Factors			
Punctuality/Reliability (i.e. The Train Arriving/Departing On Time)	46%	49%	47%
The Length Of Time The Journey Was Scheduled To Take (Speed)	13%	8%	8%
The Ease Of Being Able To Get On And Off The Train	10%	7%	10%
The Frequency Of The Trains On That Route	7%	2%	0%
The Cleanliness Of The Inside Of The Train	4%	9%	13%
Sufficient Room For All The Passengers To Sit/Stand	4%	6%	7%
The Value For Money For The Price Of Your Ticket	2%	2%	6%

NPS: Autumn 2010 and Spring 2011 combined. England and Wales franchised operators

Only shows criteria which score at least 5% in any one sector

Drivers of satisfaction for business passengers also vary by sector (Table 14). Frequency and comfort are more of a driver of satisfaction for business travel in the regional sector; while those in the London and South East and Long Distance sectors put more emphasis on punctuality.

The higher scores attributed to cleanliness of the train are also noticeable.

Table 14: Main drivers of overall satisfaction for business passengers – split by sector

Main driver of satisfaction	Business		
	London and South East	Long Distance	Regional
Station Factors			
Provision Of Information About Train Times/Platforms	5%	4%	0%
The Overall Station Environment	5%	3%	0%
Train Factors			
Punctuality/Reliability (i.e. The Train Arriving/Departing On Time)	42%	46%	22%
The Cleanliness Of The Inside Of The Train	12%	12%	9%
The Frequency Of The Trains On That Route	8%	2%	16%
The Length Of Time The Journey Was Scheduled To Take (Speed)	6%	6%	0%
The Comfort Of The Seating Area	4%	4%	13%
Sufficient Room For All The Passengers To Sit/Stand	4%	5%	0%
Personal Security Whilst On Board The Train	3%	0%	24%
Up Keep And Repair Of The Train	2%	6%	0%
The Value For Money For The Price Of Your Ticket	1%	4%	15%

NPS: Autumn 2010 and Spring 2011 combined. England and Wales franchised operators

Only shows criteria which score at least 5% in any one sector

When it comes to passengers travelling for leisure purposes (Table 15) we see that cleanliness is a particularly high driver of satisfaction – especially in the regional sector, where it is on a par with punctuality.

Table 15: Main drivers of overall satisfaction for leisure passengers – split by sector

Main driver of satisfaction	Leisure		
	London and South East	Long Distance	Regional
Station Factors			
The Overall Station Environment	7%	6%	3%
Train Factors			
Punctuality/Reliability (i.e. The Train Arriving/Departing On Time)	35%	43%	29%
The Cleanliness Of The Inside Of The Train	22%	19%	27%
The Length Of Time The Journey Was Scheduled To Take (Speed)	7%	5%	0%
The Frequency Of The Trains On That Route	7%	4%	9%
The Comfort Of The Seating Area	6%	5%	0%
The Ease Of Being Able To Get On And Off The Train	4%	5%	11%
Sufficient Room For All The Passengers To Sit/Stand	3%	3%	7%
Provision Of Information During The Journey	2%	0%	7%

NPS: Autumn 2010 and Spring 2011 combined. England and Wales franchised operators

Only shows criteria which score at least 5% in any one sector

3.5 Drivers of satisfaction – by network rail region

Drivers of satisfaction can also be analysed by Network Rail Region –Table 16.

Again, punctuality is the single biggest driver but we can see significant variances between the different regions.

Table 16: Main drivers of overall satisfaction – split by Network Rail Region

	Network Rail Regions								
Main drivers of overall satisfaction	Anglia	Kent	London North East	London North West	Midlands & Continen tal	Scotland	Sussex	Western	Wessex
Station Factors									
Provision Of Information About Train Times/Platforms	3%	4%	2%	1%	0%	0%	1%	6%	1%
Overall Station Environment	7%	7%	3%	5%	11%	15%	3%	3%	8%
Train Factors									
The Frequency Of The Trains On That Route	6%	11%	5%	4%	8%	2%	9%	3%	4%
Punctuality/Reliability (i.e. The Train Arriving/Departing On Time)	32%	44%	56%	39%	47%	47%	36%	48%	34%
The Length Of Time The Journey Was Scheduled To Take (Speed)	10%	4%	3%	8%	6%	2%	9%	9%	9%
The Value For Money For The Price Of Your Ticket	2%	4%	4%	4%	2%	5%	3%	3%	2%
Up Keep And Repair Of The Train	0%	3%	2%	0%	5%	2%	0%	1%	0%
Sufficient Room For All The Passengers To Sit/Stand	2%	6%	4%	9%	5%	7%	4%	5%	4%
The Comfort Of The Seating Area	7%	0%	3%	2%	0%	3%	2%	5%	5%
The Ease Of Being Able To Get On And Off The Train	11%	6%	7%	6%	8%	4%	8%	3%	10%
The Cleanliness Of The Inside Of The Train	20%	7%	7%	21%	5%	9%	17%	7%	18%
How Train Company Dealt With These Delays	0%	0%	1%	1%	3%	5%	2%	0%	1%

NPS: Autumn 2010 and Spring 2011 combined. Franchised operators.

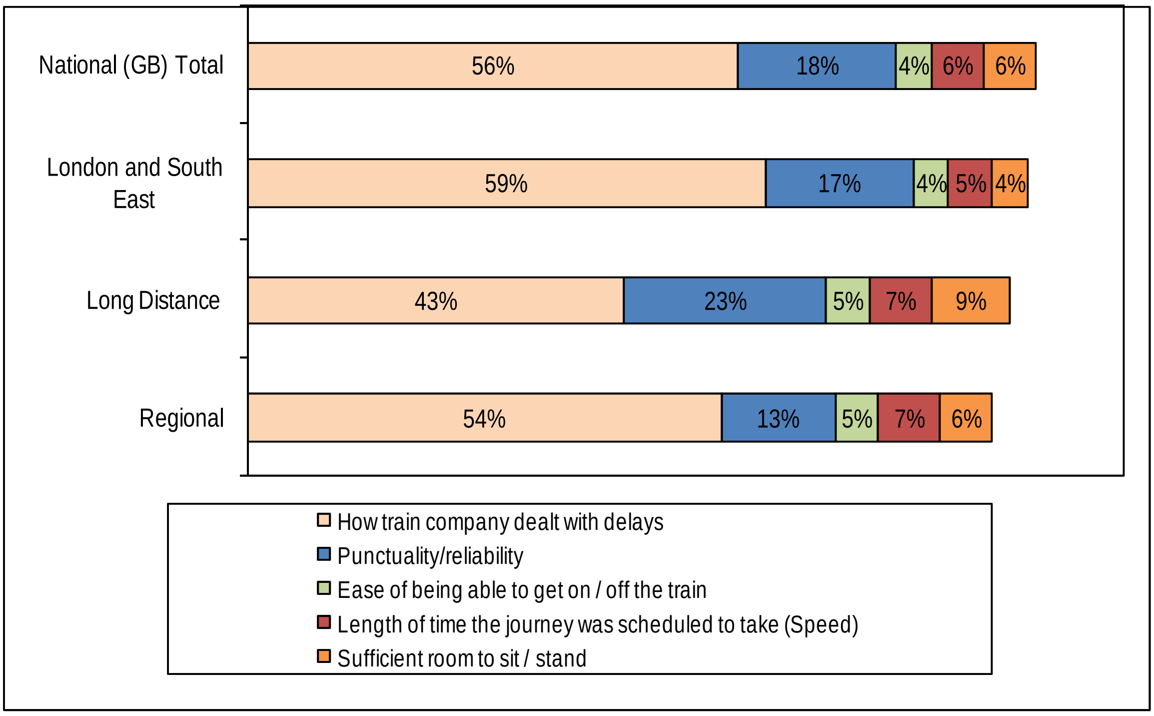
Only shows criteria which score at least 5% in any one sector

3.6 Drivers of overall dissatisfaction

It can also be informative to look at the main drivers of dissatisfaction. This reveals two key criteria: how a train company handles delays and punctuality/reliability.

Please note that due to the small sample sizes chart 2 includes all passengers (not just those in England and Wales)

Chart 2: Main drivers of overall passenger dissatisfaction



NPS: Autumn 2010 and Spring 2011 combined. Franchised operators only

How the industry handles delay is such a dominant factor that there is value in exploring passenger attitudes to disruption in more detail. NPS asks an additional series of questions to passengers who have indicated that they have been delayed. We can see from Table 17 that around one-third of those respondents rate the industry's response to delay as poor across a number of criteria.

Table 17: Responding to delay

% rating very/fairly poorly Spring 2011	**National GB total**	London and South East	Long Distance	Regional
Amount of information provided	36%	36%	25%	43%
Accuracy of information given	33%	34%	21%	36%
Usefulness of the information	30%	31%	18%	34%
Speed with which information was provided	34%	34%	26%	38%
Time taken to resolve the problem	33%	34%	18%	36%
Availability of alternative transport if service could not continue	49%	49%	34%	57%

Base: all respondents who experienced a delay (franchised operators only).

3.7 Drivers of satisfaction with value for money

In 2009 Passenger Focus, as part of a wider piece of work on fares and ticketing[18], carried out some in depth research on the drivers of passenger satisfaction with value for money[19].

This research found that value for money was fundamentally linked to price. For example, among long distance passengers, those holding advance single tickets rated value more highly than those holding full price Anytime tickets.

[18] Fares and Ticketing Study. Passenger Focus 2009.

[19] Fares and Ticketing Study – Appendix A – Understanding Drivers of Satisfaction. Passenger Focus. 2009

However, in looking at the overall drivers of value for money it was also clear that quality factors also play an important part. We found that the three most important factors influencing value for money among both commuters and long distance passengers were:

- punctuality and reliability
- being able to get a seat
- passenger information during service disruption.

Charts 3 and 4 below set out the top-ten value for money attributes identified for both commuters and long-distance passengers. The charts are based on the score each factor achieved in the stated preference exercise. Factors scoring over 100 represent an important influence on satisfaction with value for money, while those scoring under 100 are less significant.

Chart 3: Commuters top-ten value for money attributes (Fares and Ticketing Study 2009)

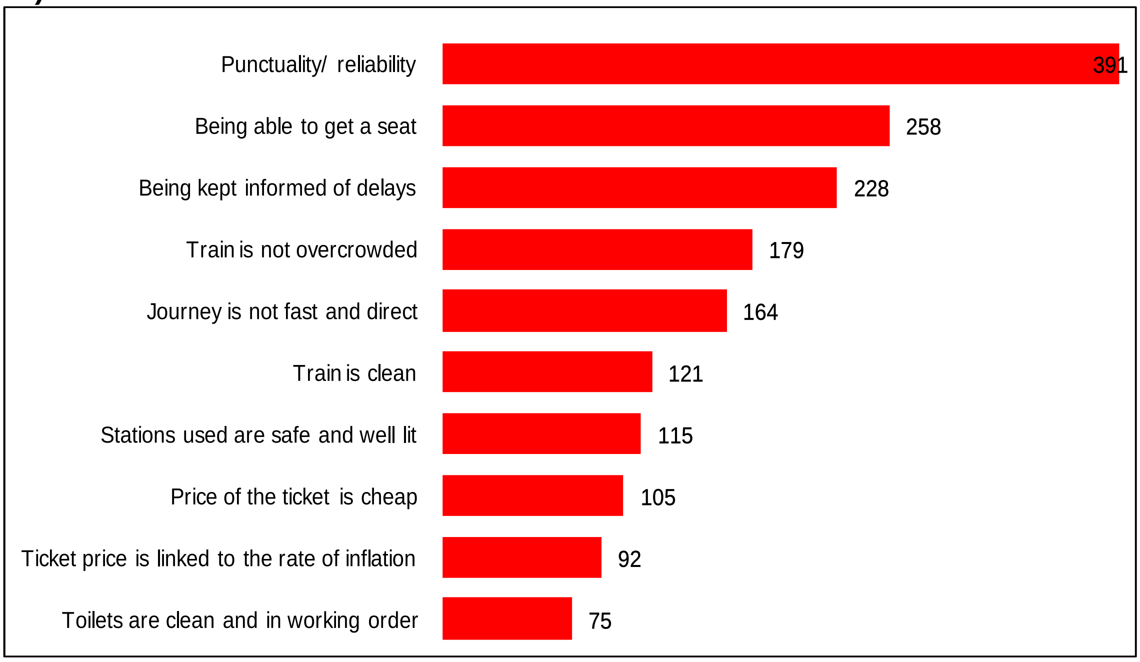
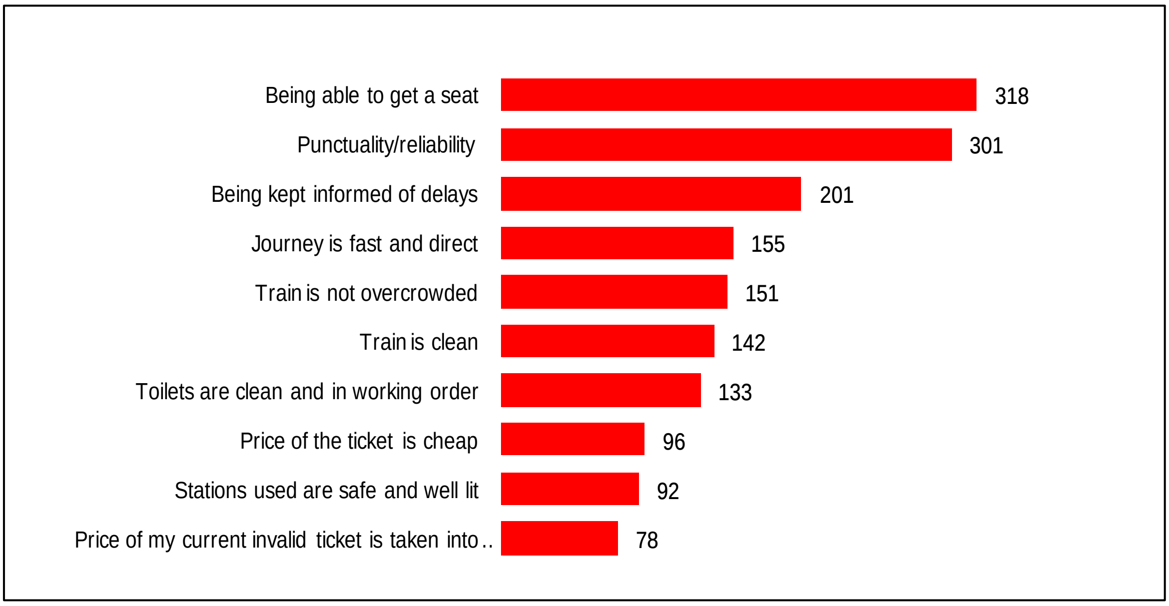


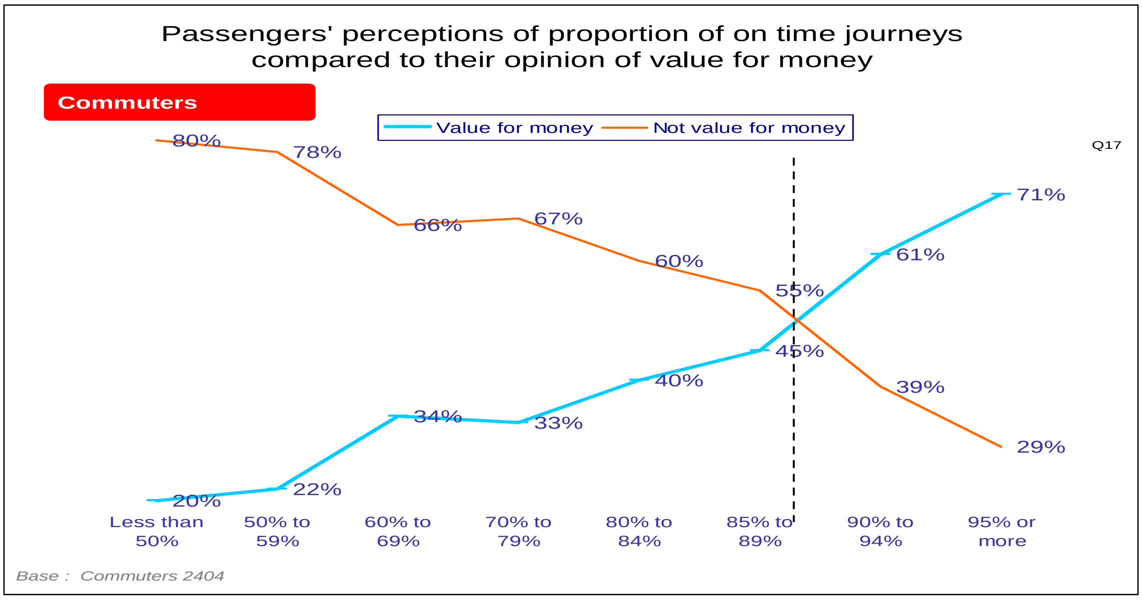
Chart 4: Long-distance passengers' top-ten value for money attributes (Fares and Ticketing Study 2009)



Both charts demonstrate the importance of getting a seat and punctuality. Further analysis reveals a direct correlation between passengers' perceptions of punctuality and getting a seat and their judgement of value.

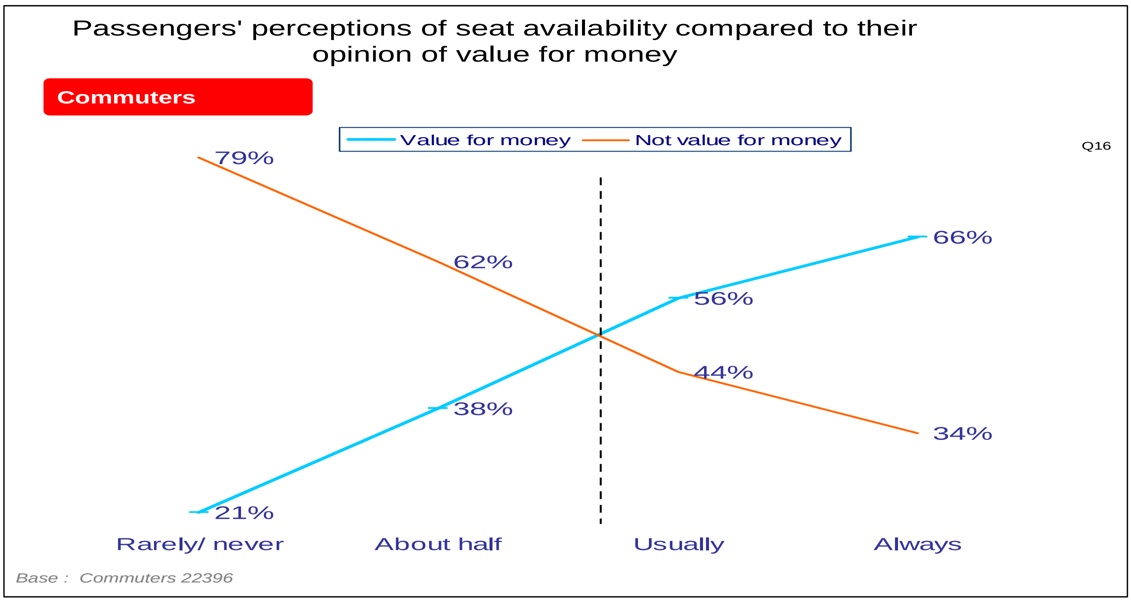
This is particularly apparent for commuters. Chart 5 shows that as commuters' perceptions of punctuality increase so does their satisfaction with value for money. For instance, of those commuters who claimed 95% or more of their journeys were on time, 71% thought their journey represented value for money. At the other end of the scale of those who thought 50% or less of their journeys were on time, only 20% thought their journey represented value for money.

Chart 5: Punctuality and value for money (Fares and Ticketing Study 2009)



Likewise Chart 6 shows the relationship with seat availability. The more likely commuters are to get a seat the higher the perception of value for money. Conversely where passengers were less likely to get a seat they gave a much lower rating for value for money.

Chart 6: Getting a seat and Punctuality (Fares and Ticketing Study 2009)



3.8 Broad conclusions

The drivers of overall satisfaction and dissatisfaction point clearly to the overriding importance of punctuality in forming passenger attitudes. This applies irrespective of sector and journey purpose. Understanding this relationship will be key in determining any future targets/forecasts of passenger satisfaction. We will explore this further in section 5.

It is perhaps not surprising that frequency and journey length also act as drivers of satisfaction for commuters – further emphasising the importance of the 'core product' to this market.

The concept of the core product also features strongly when it comes to analysing value for money: frequency, journey length and getting a seat all being important components.

While punctuality remains the biggest influence on overall satisfaction for leisure and business passengers we also see a higher emphasis on 'quality of service' features – especially cleanliness of the inside of the train.

4. Passenger priorities for improvement

Passenger Focus has also undertaken a series of research that asks passengers to rank priorities for improvement. This section looks at priorities at both a national and franchise level.

4.1 National priorities for improvement

In 2007[20] and 2009[21] we carried out stated preference research that asked passengers to rank a series of station and train based criteria in order of their priority for improvement.

Table 18 below shows the top ten priorities in 2009 compared to 2007. It also shows the relative importance of each attribute ranking relative to punctuality - the higher the score, the greater priority passengers assign to that service aspect.

Table 18: National (GB) Priorities for improvement

2009	Score	Service Improvement Preference	2007
1	1.08	Price of train tickets offer excellent value for money	1
2	1	At least 19 out of 20 trains arrive on time	3
3	0.98	Sufficient train services at times I use the train	2
4	0.86	Passengers are always able to get a seat on the train	4
5	0.79	Company keeps passengers informed if train delays	5
6	0.75	Information on train times/platforms accurate and available	7
7	0.69	Maximum queue time no more than 2 mins	6
8	0.69	Trains consistently well maintained/ excellent condition	8
9	0.67	Seating area on the train is very comfortable	9
10	0.67	Station staff are available whenever required	17

[20] Passenger Priorities for improvement in rail services. Passenger Focus. 2007

[21] Passenger Priorities for improvement in rail services. Passenger Focus. 2010

In the 2009 research there were three clear priorities for improvement: value for money, punctuality and service frequency.

Analysis by journey purpose shows that the top six priorities are also reasonably consistent across all journey purposes.

Table 19: National (Great Britain) priorities for improvement by journey purpose

Priorities for Improvement by journey purpose (2009)				
(rank order, 1 being the highest)	**National (GB)**	**Commuter**	**Business**	**Leisure**
Price of train tickets offer excellent value for money	1	1	1	1
At least 19 out of 20 trains arrive on time	2	3	2	2
Sufficient train services at times I use the train	3	2	3	3
Passengers are always able to get a seat on the train	4	4	4	4
Delay information	5	5	6	5
Train time information	6	6	5	6
Ticket queue time	7	9	8	8
Train maintenance	8	8	9	9
Seating comfort	9	13	7	10
Station staff available	10	15	12	7

4.2 Passenger priorities: regional differences

Alongside work at a national level, Passenger Focus also carries out research into local/regional priorities to help inform our submissions to franchise negotiations and the Route Utilisation Study programme.

The following table summarises the top five priorities identified for recent franchise negotiations. While the specific order of priority may differ there is a large degree of consistency between them all with punctuality, value for money, and getting a seat featuring in all.

Table 20: Passenger priorities: franchise basis

Route based priorities *(where 1= highest priority)*	Essex Thameside (2009)	East Anglia (2010)	East Coast Main Line(2009)	West Coast Main Line (2010)
Punctuality / reliability of the train	1	2	1	2
Frequency of trains on the route	2	3		
Value for money for price of ticket	3	1	2	1
Being able to get a seat on the train	4	5	3	3
Your personal security at the station	5			
Journey time		4	4	4
Facilities on board the train			5	
Upkeep/repair and cleanliness of the train				5

4.3. Broad conclusions

The priorities work, both nationally and regionally, again emphasises the importance passengers place on the 'core product': an affordable, reliable, frequent service on which you can get a seat.

5. Implications for the Initial Industry Plan

The industry's Planning Ahead publication in August 2010 set the scene for the IIP and laid out what it saw as the main challenges ahead.

a) Demonstrating continued improvement in passenger satisfaction

b) Responding to demand growth

c) Availability – continuous improvement

d) Performance – incremental improvement

e) Affordability

The following addresses each of these in turn, draws broad conclusions from the sections above and summarises any additional relevant research from Passenger Focus.

5.1 Continued improvement in passenger satisfaction

5.1.1 Satisfaction

The analysis above shows that passenger satisfaction is best differentiated by journey purpose rather than market sector. Commuters consistently record lower levels of passenger satisfaction than either business or leisure passengers (Tables 7-8). This is particularly apparent when looking at satisfaction with:

- value for money
- space to sit or stand
- how well the train company dealt with delays.

Indeed, such are the fluctuations in satisfaction that a single target for passenger satisfaction in either IIP or HLOS may not act as an incentive for all operators. A challenging target for a commuter-dominated operator might not be so challenging for a longer-distance operator.

If passenger satisfaction targets are to be set in the IIP and HLOS it would be important that these are further disaggregated by journey purpose (or at least by industry sector) in order to create a meaningful challenge / incentive to all. Ideally we would see targets disaggregated to a lower level. Passenger Focus has recently started analysing train company satisfaction by 'building blocks' – i.e. individual service groups or routes. The results (Annex A) highlight the fluctuations within a TOC – something that would be masked if only using a broad average.

The analysis of the drivers of satisfaction points to the overriding importance of punctuality. This is clearly the main driver of overall satisfaction across all passenger types and sectors (Chart 1). This is reinforced by how the train company deals with delays being the main driver of dissatisfaction (Chart 2).

While punctuality is dominant issues like journey time (speed) and frequency of service also drive elements of satisfaction for commuters. These relate to what might be termed the 'hard' measures – i.e. how often the service runs, how fast it runs and how reliable it is. These also feature strongly in our work on national priorities for improvement (Table 18).

That is not to diminish the importance of 'softer' service quality issues. Cleanliness of the inside of the train is a noticeable exception in being one of the main drivers of satisfaction across all sectors but especially among leisure passengers (Tables 11-12); while reducing ticket queuing times and the provision of information (especially during times of disruption) score well in the priorities work (Table 18).

This all suggests that attention to service quality issues can still make a difference for passengers notwithstanding the emphasis on traditional hard measures of performance.

5.1.2 Dissatisfaction

NPS shows consistently that passengers do not believe disruption is well-handled by train companies (Table 4). Handling disruption is also a high priority for improvement among passengers across Britain (Table 18) as well as being the main driver of overall dissatisfaction within NPS (Chart 2).

Additional NPS research by Passenger Focus (Table 17) looks at the passenger dissatisfaction over how different aspects of a delay are handled. It shows that around one-third of passengers who had been delayed rated the industry response as 'poor' across a range of features.

To help understand why scores are so low and what practical steps could be taken to improve them, Passenger Focus established a 'disruption panel' to obtain accounts from passengers of how their train company handled disruption. The panel consisted of regular rail travellers who provided a short report of their experiences whenever disruption occurred, together with their thoughts about what might have been handled better. Over the 12-months that the panel was in operation Passenger Focus received around 2000 'disruption reports'.

The final report[22] identified the importance of:

- providing accurate and consistent information
- enabling passengers to avoid disruption in the first place – e.g. by telling them early enough some can plan an alternative route or use a different station
- behaving 'considerately': when accurate information is shared in a proactive, timely way, passengers are often quite forgiving, even when the delay is lengthy.

5.2 Responding to demand growth

Growth in demand for rail, while welcome, has created crowding problems in some areas. As well as the traditional issues with commuting to and from London there are some significant problems with crowding in regional cities.

This latter point is illustrated in the fact that space to sit/stand drives a slightly higher proportion of overall satisfaction for commuters on regional services than for London

[22] Delays and Disruption. Rail Passengers Have Their Say. Passenger Focus. December 2010.

commuters (Table 13). It is also significant that getting a seat was the third highest priority for improvement in our research for both the East and West Coast franchises.

Capacity/crowding is clearly not just a London commuter issue.

Getting a seat is also one of the key drivers of satisfaction with value for money (Charts 3-4). Indeed, the more likely passengers are to get a seat the higher the likely value for money score (Chart 6).

5.3 Availability – continuous improvement

Frequency of service has been identified above as one of the 'core products' that helps to drive overall passenger satisfaction.

Additional research conducted to inform our franchise submissions shows that this isn't just at traditional peak periods in order to combat crowding – there is a strong desire for more later-evening services and particularly for enhanced weekend frequencies. The latter point can be seen strongly in the following table showing passengers' relative levels of satisfaction for Weekday, Saturday and Sunday services. It is likely that these satisfaction levels reflected prevailing levels of engineering work taking place over weekends

Table 21: Satisfaction with frequency (Passenger Focus franchise research)

Satisfaction with frequency of service (% fairly or very satisfied)			
	West Coast (2010)	**East Coast (2009)**	**Greater Anglia (2010)**
Weekday	87%	84%	73%
Saturday	81%	73%	43%
Sunday	68%	65%	27%

However, more evening and weekend services encroach into the times when engineering work has traditionally been undertaken. Balancing the increasing demand for a 7-day railway with the need for engineering possessions will be a big challenge for Control Period 5.

Passenger Focus has carried out work on planned engineering possessions, and particularly the use of bus replacement service. Understandably, having bought a ticket to travel by train, passengers are not overly keen to disembark onto rail replacement buses. Research into passengers' attitudes to engineering work[23] showed that passengers rated replacement buses as inconvenient and would rather spend up to an hour extra on the train than the time proposed for a bus replacement journey.

More recent work surrounding the major disruption at Reading station over December 2010 also revealed a strong preference to 'stay on the train' and operate over diversionary routes rather than use a rail replacement bus service[24]. However, the research did reveal that a well managed bus replacement service, with good communication, good signing and plenty of staff being available to help could improve passenger satisfaction with the bus replacement.

So, while the key implications for IIP are in respect to providing more diversionary routes to keep passengers on the train and reduce the level of bus replacement services, it also shows that 'customer service' issues (particularly information) can have an impact on satisfaction levels.

5.4 Performance – incremental improvement

One of the key themes running through the drivers of satisfaction and the priorities for improvement analysis is that of punctuality. Given recent improvements in PPM it might have been expected that passenger satisfaction with punctuality would have risen by more than it has (see Table 3).

This prompted Passenger Focus to examine in much greater depth passengers' experience of delay and how it corresponds with PPM figures. The work explored in detail the correlation between passenger satisfaction with punctuality as measured by the National Passenger Survey (NPS) for a three to four year period and actual train performance recorded by the train company over the same period. An initial study was conducted on London commuter services with National Express East Anglia[25], with two further studies carried out on Northern Rail regional commuter services (into and from Manchester) and on longer distance journeys with CrossCountry[26]. Further work is currently being undertaken with East Coast.

The research found:

[23] Passengers Attitudes Towards Engineering Work. Passenger Focus, Network Rail, ATOC, RSSB. 2003

[24] Reading Station engineering works. May 2011. Passenger Focus

[25] Towards a 'right time' East Anglian railway. Passenger Focus. March 2010

[26] Improving Punctuality for Passengers. Passenger Focus. February 2011.

- Average lateness experienced by passengers is worse than that recorded for train services. This is because of the effect of cancellations and because many trains that are on time at their destination are late at intermediate stations.
- on average, passenger satisfaction with punctuality reduces by between two and three percentage points with every minute of delay;
- Commuters (except those travelling long distances) notice lateness after one minute of delay, not just after the five or ten minutes allowed by PPM. Their satisfaction with punctuality falls by an average of five percentage points per minute during the initial period of delay.
- business and leisure users and long distance commuters tend to change their level of satisfaction with punctuality after a delay of four to six minutes.

In many ways this confirms suspicions that PPM does not adequately reflect passengers' own experience of delays. We believe that this raises two key issues that must be addressed by the industry:

- measuring punctuality at intermediate stations rather than just at the destination.
- adequacy of the existing 5 or 10 minute 'allowance' when determining delay and whether a new threshold needs to be considered.

Joint research with the Office of Rail Regulation[27] also looked at the provision of performance information to passengers. The conclusions indicate a need for passengers to have greater access to performance data but at a level that is relevant to them. This will require the industry to provide performance data at much greater levels of disaggregation.

5.5 Affordability

It is clear from the 'Planning Ahead' document and the findings from the Rail Value for Money Study chaired by Sir Roy McNulty that the above challenges will have to be delivered in an environment of cost-cutting and efficiency savings. The findings from the 'McNulty' Study also raised questions about the potential use of greater demand management with fares.

Our own research indicates that value for money for passengers is already a key issue. Not only is it one of the areas of lower satisfaction (Table 3) it is the highest priority for improvement nationally (Table 18) and consistently one of the highest within franchise research (Table 19).

As part of our Fares and Ticketing research in 2009 Passenger Focus compared fares in Great Britain with those of other European countries[28]. It found that commuting to London

[27] Putting rail information in the public domain. ORR and Passenger Focus. May 2011.

[28] Fares and Ticketing Study – Appendix C – Comparisons Between Fares in Great Britain and Continental Europe. Passenger Focus. 2009

was considerably more expensive when compared with commuting to other principal European cities. This wasn't just a London issue, even the regional cost of commuting (i.e. to Cambridge, Nottingham, Newcastle, Nottingham, Bristol, Birmingham and Leeds) was higher than the cost into those principal European cities.

Another element identified by the research was the high price passengers pay for flexibility in their travel plans. Our European comparison showed that long distance travel in Britain can be cheaper than anywhere else, but in return passengers have zero flexibility – the ticket is for one train, and one train only. At the other end of the spectrum, the price of complete flexibility is very high compared with other countries. The price of flexibility is high – up to 10 times higher than the cheapest 'one train only' ticket on some routes. The same research found that Great Britain benefits from a higher frequency of service – something also recognised in European passenger satisfaction research[29] which showed that satisfaction with frequency in Great Britain was the third highest in Europe (just behind Luxembourg and Finland). The benefits of such frequency are in danger of being lost if the cost of flexibility is too high.

Flexibility was also an issue raised in research[30] among business passengers. The high price of flexibility within the ticketing structure, for example to allow for a meeting that overruns by 30 minutes, was cited as a particular problem for businesses.

Any attempt to improve industry affordability by passing costs onto passengers in the form of fare increases will clearly have an impact on perceptions of value for money, as would moves towards greater use of price to manage demand. Many commuters have little (or limited) ability to change travel patterns in response to rising fares. Such decisions are often tied into longer-term choices on where to work or live. Some may be able to change modes of travel but others, especially when commuting into London, have little in the way of a viable alternative.

5.6 Conclusions

[29] Flash Eurobarometer. Survey on passengers' satisfaction with rail services. June 2011

[30] Employers' business travel needs from rail. Passenger Focus. February 2009.

The rail industry is under very clear pressure to reduce costs and to increase efficiency in Control Period 5. There are benefits to passengers from a more efficient railway: higher costs being passed back to passengers directly – through fares – or indirectly through less investment.

However, in an era of cuts it will be important that the remaining funds are spent on providing the type of services that passengers most want and which make the biggest difference to their journeys.

This report aims to set out both – it outlines what passengers tell us are their biggest priorities for improvement and what maximises overall satisfaction.

Passenger Focus

July 2011

ANNEX A: Overall passenger satisfaction by route (NPS Spring 2011 – franchised operators)

Overall satisfaction by route	sample size	% satisfied
Arriva Trains Wales - North Wales	401	85
Arriva Trains Wales - South Wales	254	88
Arriva Trains Wales - Valley	245	88
c2c	1191	91
Chiltern Railways - North	285	88
Chiltern Railways - South	896	89
Crosscountry - Birmingham - Manchester	154	83
Crosscountry - Birmingham - North East And Scotland	344	90
Crosscountry - Birmingham - South Coast	363	79
Crosscountry - Birmingham - South West	265	84
Crosscountry - Birmingham - Stansted	193	87
Crosscountry - Nottingham - Cardiff	140	85
East Coast - London - East Midlands/East Of England	278	85
East Coast - London - Scotland/North	308	86

Overall satisfaction by route	sample size	% satisfied
First Capital Connect - Great Northern	612	76
First Capital Connect - Thameslink Loop	382	81
First Capital Connect - Thameslink North	478	80
First Capital Connect - Thameslink South	320	79
First Great Western - Long Distance	1527	84
First Great Western - London Thames Valley	1176	80
First Great Western - West	760	81
First Hull Trains	733	95
First TransPennine Express - North	716	89
First TransPennine Express - North West	256	88
First TransPennine Express - South	202	92
London Midland - London Commuter	363	81
London Midland - West Coast	211	90
London Midland - West Midlands	633	82

East		
East Coast - London - Yorkshire	451	86
East Coast - Non-London journeys	460	88
East Midlands Trains - Liverpool - Norwich	220	92
East Midlands Trains - Local	241	79
East Midlands Trains - London	918	87

London Overground - Gospel Oak - Barking	180	96
London Overground - Richmond/Clapham - Stratford	276	80
London Overground - Watford - Euston	277	96
London Overground - Dalston - Croydon	202	96

Overall satisfaction by route	sample size	% satisfied
National Express East Anglia - Intercity	489	83
National Express East Anglia - Mainline	477	73
National Express East Anglia - Metro	391	80
National Express East Anglia - Rural	234	90
National Express East Anglia - Stansted	173	76
National Express East Anglia - West Anglia	585	77
Northern - Lancashire & Cumbria	131	88
Northern - Manchester & Liverpool	361	79

Overall satisfaction	sample size	% satisfied
Southern - Gatwick Express	413	89
Southern - Sussex Coast	1141	80
Southern - Metro	956	84
South West Trains - Island Line	131	91
South West Trains - London	564	86
South West Trains - Mainline	280	85
South West Trains - Metro	325	83
South West Trains - Not Managed By	111	93

Northern - South & East Yorkshire	274	83
Northern - Tyne Tees & Wear	117	90
Northern - West & North Yorkshire	345	85
Merseyrail - Northern	363	90
Merseyrail - Wirral	296	92
Scotrail - Interurban	510	88
Scotrail - Rural	63	94
Scotrail - Strathclyde	290	84
Scotrail - Urban	284	88
Southeastern - High Speed	305	89
Southeastern - Mainline	505	79
Southeastern - Metro	1090	83

South West Trains		
South West Trains - Portsmouth	173	78
South West Trains - Reading/Windsor	245	83
South West Trains - Suburban	323	87
South West Trains - West Of England	136	90
Virgin - Birmingham - Scotland	180	88
Virgin - London - Liverpool	130	92
Virgin - London - Manchester	348	91
Virgin - London - North Wales	125	90
Virgin - London - Scotland	241	93
Virgin - London - Wolverhampton	314	88