



Welsh passenger insights:
Passenger satisfaction with rail
services in Wales

May 2009

Quick facts about passenger satisfaction with rail services in Wales

- Passenger's overall satisfaction with rail services in Wales has been steadily increasing for the last five years and is now 87%.
- Passenger's rate their experience on board the train higher than that at the station, the reverse of the trend elsewhere in Britain.
- For stations, passengers are most satisfied with how requests to staff are handled, the provision of journey information and ticket buying facilities.
- For stations, passengers are least satisfied with station facilities and services, the availability of station staff and the overall station environment.
- For trains, passengers are most satisfied with the duration/speed of journeys and the ease of getting on/off the train.
- For trains, passengers are least satisfied with how train companies deal with delays and on-board toilets.
- Passenger satisfaction varies significantly with the type of journey being undertaken, with leisure travellers the most satisfied and commuters the least satisfied.
- Passenger satisfaction increases as people get older. People aged 65 and above are most satisfied, while the least satisfied age group is 26-34 years.
- Women are more satisfied with rail services than men.
- Although the level of passenger satisfaction varies with age and gender, all passengers tend to have a common view of which attributes of the train and station experience are the best and worst.
- Punctuality/reliability is the most important factor in passenger's rating their overall journey highly, followed by journey duration (speed).
- The biggest cause of low satisfaction scores from passengers is how train companies deal with delays, followed by punctuality and journey duration (speed).
- Passengers' priorities for long-term investment in the rail network in Wales are for improvements to the value for money of tickets, followed by increased frequency and punctuality of services.
- Passenger satisfaction with value for money is most influenced by the punctuality and reliability of services, while the greatest cause of dissatisfaction is the inability to get a seat.

Introduction

Wales' railways have enjoyed a renaissance in recent years with sustained passenger growth reviving both public and political interest in the rail network.

Passenger Focus has assembled a wide range of evidence that highlights the travelling public's opinion on trains, stations and other aspects of the rail network. Our work gives clear messages about what passengers like and don't like, their priorities for improvements and their views on subjects such as new ticketing technologies and the environment. The key messages coming from passengers' are:

- punctual and reliable trains are the biggest contributor to passenger satisfaction
- poor handling of delays is the biggest contributor to passenger dissatisfaction
- satisfaction with stations in Wales is considerably lower than it is elsewhere in Britain
- value for money of fares, punctuality and the ability to get a seat are the top priority for passengers for investment in the rail network.

How satisfied are passengers with the railway in Wales?

There has been a general upward trend in passenger's overall satisfaction with rail services in Wales during the last five year. For people beginning their journey in Wales (all train companies) 87% of passengers surveyed in the Autumn 2008 National Passenger Survey (NPS) rated their journey as satisfactory or better. This compared with 79% in Spring 2004.

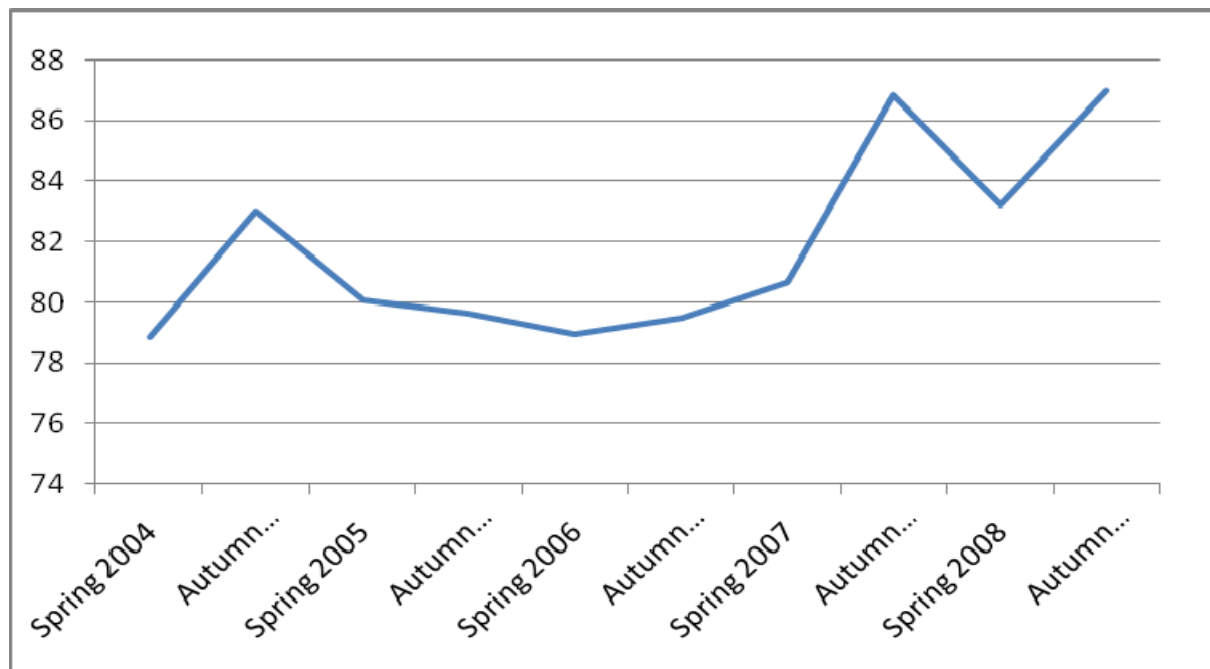


Figure 1: Passenger's overall satisfaction with train journeys in Wales has steadily increased in recent years.

Passengers in Wales rate their experiences on-board the train more favourably than those at a rail station, which is the reverse of the pattern seen across Britain as a whole. This reflects the fact that passengers in Wales are much less satisfied with their experiences at stations than elsewhere in Britain - for example in the Autumn 2008 NPS satisfaction with station facilities in Wales was 36% compared with 50% in Britain.

It is also worth noting that passengers' experience of specific aspects of their journey varies quite markedly, both at the station and for the train journey itself.

With regards to their experience on-board the train (based on average scores from the National Passenger survey 2006-2008), passengers in Wales are most satisfied with the duration/speed of their journeys (86%), the ease with which they can get on/off the train (80%) and the punctuality/reliability of services (78%), while they give low ratings to how train companies deal with delays (37%) and on-board toilets (42%).

While at the station, passengers give their highest ratings to how requests to staff are handled (82% satisfied) and the provision of journey information (72%). In contrast, passengers continue to rate station facilities and services (35%) and the availability of station staff (50%) poorly.

How does passenger satisfaction vary with journey type?

The type of journey that passengers in Wales are undertaking has a noticeable impact on their satisfaction with train services. Commuters, typically travelling on the busiest trains and paying peak fares, are the least satisfied passenger group rating their overall experience at 77% (based on average scores from the National Passenger survey 2006-2008). In contrast, leisure travellers, likely to have greater freedom and flexibility with their travel arrangements, are the most satisfied with an overall rating of 87%. In between these two groups, are business travellers with an overall satisfaction rating of 78%.

The biggest difference in satisfaction ratings between these different journey types in Wales relates to value-for-money where only 42% of commuters are satisfied with the price of their ticket compared with 65% of leisure travellers. Other big differences relate to train capacity, where only 60% of commuters are satisfied with the room to sit or stand compared with 76% of leisure passengers, and punctuality/reliability which rates at only 67% with commuters compared with 84% for leisure travellers.

While the actual ratings scores vary, there is a great deal of similarity between the different journey types when it comes to the specific areas of the rail experience that they rate highly and those they rate poorly. For all journey types, some of the highest satisfaction scores are given to the length of time the journey is scheduled to take (journey speed) and how requests to station staff are handled. Similarly, station facilities and services, how well train companies deal with delays and train toilet facilities receive the lowest satisfaction scores for all journey types.

Service attribute	% very satisfied or satisfied			
	All	Commuter	Business	Leisure
Overall satisfaction	83	77	78	87
<i>Station facilities</i>				
Ticket buying facilities	66	63	67	69
Info about train times/platforms	72	66	74	75
Upkeep/repair of the station buildings	54	48	49	57
Cleanliness	57	52	60	59
Facilities and services	35	30	43	36
Attitude and helpfulness of staff	66	62	71	68
Connections with other public transport	61	52	68	65
Facilities for car parking	53	46	53	57
Overall environment	52	47	53	55
Personal security while using	54	50	62	55
Availability of staff	50	47	58	51
How request to station staff was handled	82	74	79	85
<i>Train facilities</i>				
Frequency of trains on route	77	70	79	80
Punctuality/reliability	78	67	77	84
Length of time of journey (speed)	86	82	81	89
Connections with other train services	69	62	66	73
Value for money of ticket	56	42	49	65
Cleanliness of the train	71	63	76	75
Upkeep and repair of the train	69	60	71	74
Provision of information during journey	58	48	65	62
Helpfulness/attitude of staff	76	70	76	79
Space for luggage	60	53	61	62
Toilet facilities	42	34	44	47

Sufficient room to sit/stand	71	60	71	76
Comfort of seating area	72	63	68	77
Ease of getting on/off	80	74	78	83
Personal security while on board	75	71	79	77
Cleanliness of the train (inside)	71	63	75	74
Cleanliness of the train (outside)	60	51	64	63
Availability of staff	61	52	64	66
How well company dealt with delays	37	25	41	45

Table 1: Commuters typically give the latest ratings for overall satisfaction, while leisure passengers give the highest (based on NPS scores 2006-2008).

Overall	Commuter	Business	Leisure
1. Journey speed (86) 2. Station staff requests (82) 3. Ease of getting on/off train (80)	1. Journey speed (82) =2. Ease of getting on/off train (74) =2. Station staff requests (74)	1. Journey speed (81) =2. Frequency (79) =2. Station staff requests (79) =2. Personal security on-board train (79)	1. Journey speed (89) 2. Station staff requests (85) 3. Punctuality/reliability (84)

Table 2: NPS train and station factors with highest passenger satisfaction scores

Overall	Commuter	Business	Leisure
1. Station facilities and services (35) 2. How delays handled (37) 3. Train toilets (42)	1. How delays handled (25) 2. Station facilities and services (30) 3. Train toilets (34)	1. How delays handled (41) 2. Station facilities and services (43) 3. Train toilets (44)	1. Station facilities and services (36) 2. How delays handled (45) 3. Train toilets (47)

Table 3: NPS train and station attributes with lowest passenger satisfaction scores

How does passenger satisfaction vary with age?

As with journey purpose, the age of passengers making rail journeys in Wales also has an impact on the level of satisfaction with older people likely to rate rail services more highly than their younger counterparts.

Based on average scores from the National Passenger survey between 2006-2008, the age group most satisfied with their journeys are those aged 65 and above (91% satisfied), followed by those between 60-64 years (88%) and 55-59 years (87%). In contrast, the least satisfied age group is 26-34 years (77%) followed by 16-25 (78%).

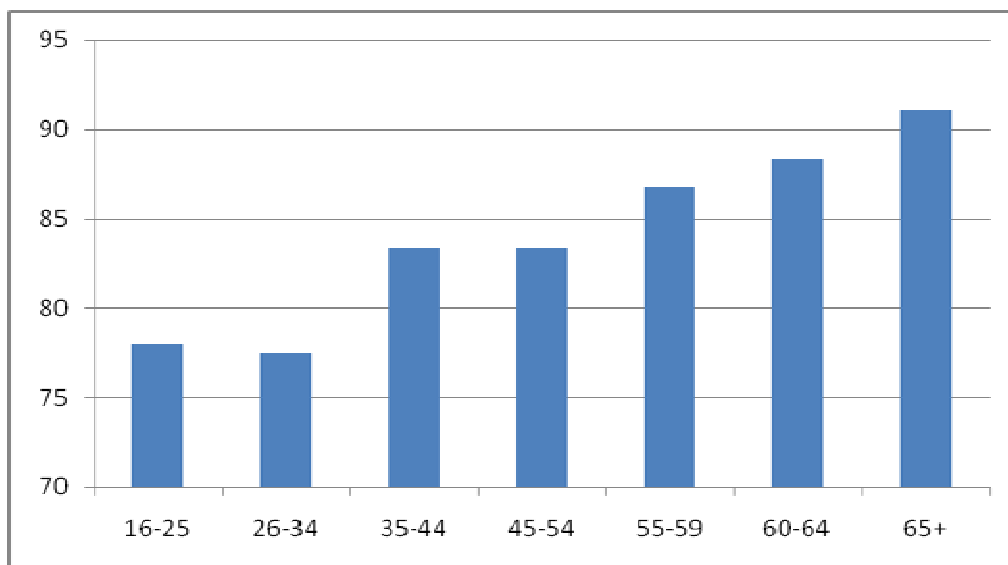


Figure 2: Passenger satisfaction in Wales tends to increase as passengers get older.

As with journey purpose, while the actual ratings scores vary, there is a great deal of similarity between the different age groups when it comes to the specific areas of the rail experience that they rate highly and those they rate poorly. With regards to the station experience, all age groups give their highest rating to how requests to station staff are handled and all but one give the second highest to the provision of information on services/platforms. Other aspects of the station experience receiving relatively high scores are the attitude and helpfulness of staff and ticket buying facilities. All age groups give their lowest ratings for station factors to station facilities and services, while other aspects rated poorly include the availability of station staff, personal security at the station, the overall station environment, the upkeep and repair of station buildings and facilities for car parking.

In relation to the experience on the train itself all age groups give their highest satisfaction score to the length of the journey (speed). Other aspects of the on-board journey that receive high scores include punctuality/reliability, the ease of getting on/off the train, the frequency of services and the helpfulness of train staff. The lowest areas of satisfaction is universally with how train companies deal with delays, while similarly the second lowest score is given to train toilet facilities. Other factors receiving low scores include value for money of the price of the ticket and the information provided during the journey.

Station							
	16-25	26-34	35-44	45-54	55-59	60-64	65+
Best	1. Request to station staff (73) 2. Train information (67) 3. Ticket buying facilities (66)	1. Request to station staff (79) 2. Train information (66) 3. Attitude/helpfulness of staff (61)	1. Request to station staff (83) 2. Train information (72) 3. Ticket buying facilities (69)	1. Request to station staff (80) 2. Train information (70) 3. Attitude/helpfulness of staff (64)	1. Request to station staff (88) 2. Train information (78) 3. Attitude/helpfulness of staff (72)	1. Request to station staff (90) 2. Train information (81) 3. Ticket buying facilities (73)	1. Request to station staff (90) 2. Attitude/helpfulness of staff (88) =3. Ticket buying facilities (85) =3. Train information (85)
Worst	1. Station facilities & services (34) 2. Upkeep/repair of station buildings (49) 3. Car parking (50)	1. Station facilities & services (29) 2. Availability of station staff (46) 3. Overall station environment (48)	1. Station facilities & services (34) =2. Availability of station staff (48) =2. Personal security at station (48)	1. Station facilities & services (35) 2. Personal security at station (49) =3. Availability of station staff (50) =3. Car parking (50)	1. Station facilities & services (37) 2. Availability of station staff (50) 3. Car parking (56)	1. Station facilities & services (35) 2. Availability of station staff (46) 3. Car parking (54)	1. Station facilities & services (44) 2. Station overall environment (60) 3. Upkeep/repair of station (64)

Table 4: NPS station factors receiving highest and lowest scores by age.

Train							
	16-25	26-34	35-44	45-54	55-59	60-64	65+
Best	1. Journey duration/speed (80) 2. Ease of getting on/off train (78) =3. Punctuality/reliability (72) =3. Personal security on train (72)	1. Journey duration/speed (82) 2. Ease of getting on/off train (77) =3. Personal security on train (72). =3. Helpfulness of train staff (72)	1. Journey duration/speed (87) 2. Punctuality/reliability (80) =3. Ease of getting on/off train (78) =3. Frequency (78)	1. Journey duration/speed (86) =2. Punctuality/reliability (78) =2. Helpfulness of train staff (78)	1. Journey duration/speed (92) 2. Ease of getting on/off train (83) 3. Frequency (82)	1. Journey duration/speed (91) =2. Ease of getting on/off train (86) =2. Helpfulness of train staff (86)	=1. Journey duration/speed (94) =1. Frequency (94) 3. Helpfulness of train staff (90)
Worst ratings	1. How delays are handled (30) 2. Toilet facilities (34) 3. Value for money (35)	1. How delays are handled (27) 2. Toilet facilities (33) 3. Value for money (42)	1. How delays are handled (38) 2. Toilet facilities (39) 3. Information during journey (54)	1. How delays are handled (36) 2. Toilet facilities (45) 3. Value for money (57)	1. How delays are handled (37) 2. Toilet facilities (48) 3. Cleanliness of outside of train (58)	1. How delays are handled (55) 2. Toilet facilities (57) 3. Information during journey (69)	1. How delays are handled (59) =2. Toilet facilities (63) =2. Space for luggage (63)

Table 5: NPS train factors receiving highest and lowest scores by age.

How does passenger satisfaction vary with gender?

When it comes to the relationship between gender and passenger satisfaction in Wales there is a general pattern of women giving higher ratings than men. In terms of overall satisfaction, 84% of women rate their rail experience as satisfactory compared with 81% of men (based on average scores from the National Passenger survey 2006-2008). Women are also more satisfied than men with most specific aspects of their rail journey, particularly their experiences at the station.

What are the major influences on passenger satisfaction?

Passenger Focus has analysed the results from the National Passenger Survey from 2006-2008 to see what it is that the journeys of satisfied passengers in Wales have in common. Similarly, we have looked at the train and station factors that are most likely to result in passengers being dissatisfied with their rail journeys.

The analyses show that good punctuality (44%) is easily the most important factor in passengers being satisfied with their overall journey, followed by the journey duration (17%), comfort of seating (7%) and ease of getting on/off the train (7%).

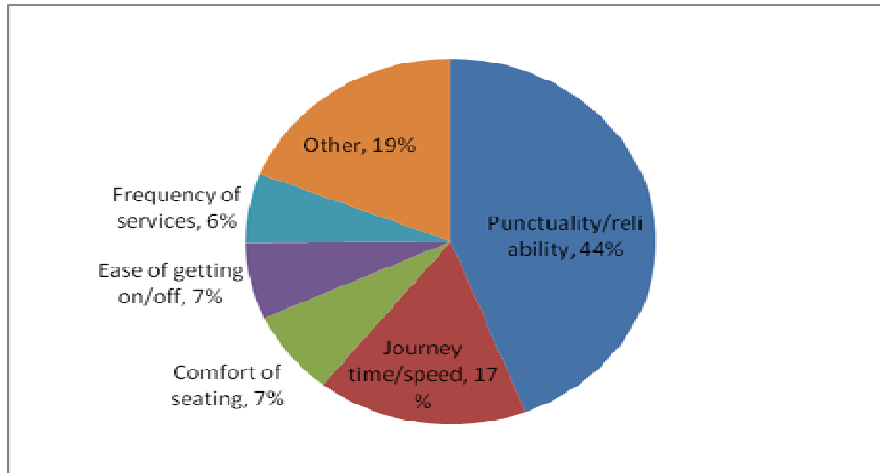


Figure 3: Punctuality is the main driver of overall journey satisfaction in Wales.

When it comes to the causes of dissatisfaction among rail passengers in Wales, the most influential factor is how well train companies deal with delays (50%). Punctuality (16%) is again an important factor, being the second biggest contributor to passengers rating their journey poorly. Other contributors to poor ratings include journey speed (10%) and the cleanliness of the train (5%).

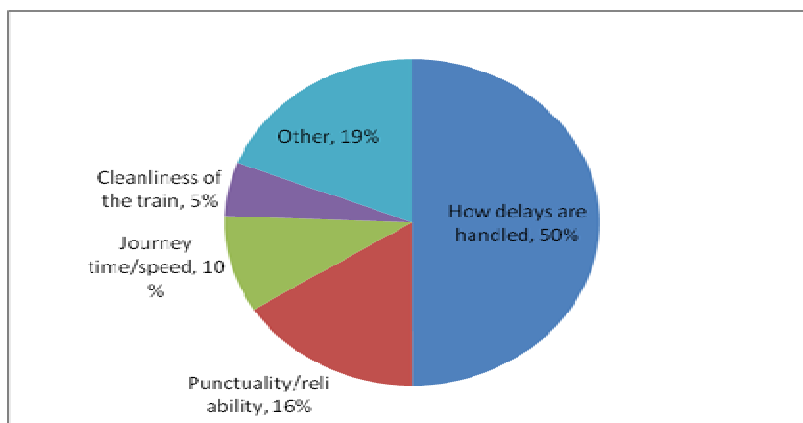


Figure 4: How delays are handled is the main driver of overall journey dissatisfaction in Wales

What are passengers' priorities for investment?

When passengers in Wales are asked to think beyond their most recent journey and consider where they would like to see investment in Britain's rail network directed, some clear priorities emerge. Top of the list is to improve the 'value-for-money' offered by rail fares, followed by investment to increase the punctuality/reliability of services and service frequency. The next highest priorities are tackling overcrowding on trains and ensuring trains are clean and well presented.

Compared with Great Britain overall, Welsh passengers expressed a lower priority for faster journeys and connections with other forms of public transport, but greater priority for train service connections and the condition of trains.

Wales	Attribute	GB
1	Price of train tickets offer excellent value for money	1
2	At least 19 out of 20 trains arrive on time	3
3	Sufficient train services at times I use the train	2
4	Passengers are always able to get a seat on the train	4
5	Trains are consistently well maintained/in excellent condition	8
6	Company keeps passengers informed if train delays	5
7	Seating area on the train is very comfortable	9
8	Maximum queue time no more than two minutes to purchase tickets	6
9	Information on train times/platforms accurate and available	7
10	Connections with other train services are always good	15
11	Passengers experience a high level of security on the train	10
12	The inside of the train is cleaned to a high standard	14
13	Station staff are available whenever required	17
14	Personal security at stations is improved through CCTV/staff	11
15	Facilities at stations are plentiful and of good quality	18
16	All trains have staff to assist	20
17	Good easy connections with other forms of transport	12
18	Your journey time is reduced by five minutes	13
19	All station staff are helpful and with a positive attitude	21
20	Always a quick response to information requests at stations	19
21	All train staff helpful and have a positive attitude	23
22	There are good quality toilet facilities on every train	25
23	Useful information is provided throughout the journey	22
24	There is sufficient space for passengers' luggage	24
25	The train travels at a fast speed throughout the journey	16
26	Station environment always pleasant and comfortable	26
27	Stations are cleaned to a high standard	27
28	All station building maintained to a high standard	28
29	High quality car parking available	29
30	The outside of the train is cleaned to a high standard	30

Table 6: Passenger priorities for investment.

What influences passengers' views on value for money?

With value for money being passengers' top priority for investment in Wales, Passenger Focus has analysed the results from the NPS to see what factors contribute most significantly to their views in this regard. Based on average results between 2006-2008, the analysis shows that the biggest influence on positive feelings towards value for money comes from punctuality and reliability – the same driver as for overall satisfaction. In terms of negative feelings, however the biggest drivers are related to capacity (sufficient room to sit and stand) in contrast to overall satisfaction where it is how delays are handled.

Three factors are common to the top five drivers of both satisfaction and dissatisfaction with value for money – in other words, when good these factors drive up satisfaction, but when poor they drive up dissatisfaction. They are: sufficient room for all passengers to sit or stand; length of time the journey is scheduled to take (journey speed); and the availability of staff on the train. These show significant overlap with the main influences of passengers' overall satisfaction with rail journeys discussed earlier.

Drivers of satisfaction with value for money (all passengers)			Drivers of dissatisfaction with value for money (all passengers)		
1	Punctuality and reliability	19%	1	Sufficient room for all passengers to sit or stand	24%
2	Length of time the journey is scheduled to take	18%	2	Length of time the journey is scheduled to take	14%
3=	Connections with other train services	13%	3=	Availability of staff on the train	11%
3=	Sufficient room for passengers to sit or stand	13%	3=	Car parking facilities	11%
5	Availability of staff on the train	10%	5	Frequency of trains on that route	10%

Table 7: Drivers of satisfaction with value for money in Wales.



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Passenger Focus
FREEPOST (RRRE-ETTC-LEET)
PO Box 4257
Manchester
M60 3AR

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

Passenger Focus is the operating
name of the Rail Passengers Council