transportfocus

# Memorandum to the Transport Committee
# *Improving the rail passenger experience*

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## 1. Introduction

1.1 Transport Focus is the independent consumer watchdog representing the interests of rail users throughout Great Britain; bus, coach and tram users across England, outside London; and users of the Strategic Road Network in England.

## *2. General views on the passenger experience*

Transport Focus is an evidence-based organisation. We have four main strands of research which combine to give a good overview of the overall passenger experience.

2.1 *Passenger Priorities*

In 2014 we asked 3,500 passengers across the country to rank a series of train and station categories in order of their perceived priority for improvement[1]. This research is used to help inform decisions on the High Level Output Specification (HLOS) and individual franchise negotiations.

Appendix 1 shows the top-ten priorities at a Great Britain level alongside those for commuters, business and leisure passengers. While there are some differences there is a clear desire from all passengers for:

- value for money for the price of tickets
- a good 'core product' (punctuality, reliability, frequency and capacity) [2]
- good information (both generally and during times of disruption)

Perhaps one of the bigger differences is over the provision of free Wi-Fi – this is 10th highest nationally but rises to 4th among business passengers.

2.2 *Passenger satisfaction*

Transport Focus consults over 50,000[3] passengers a year to produce the National Rail Passenger Survey (NRPS) - a network-wide picture of passengers' satisfaction with rail travel. Data goes back to 1999 so it forms a long time-series. It can be used to identify trends and to benchmark services both within a train company and between train companies; to

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[1] Rail Passenger Priorities for Improvement. Transport Focus. 2014

[2] Our 'Fares and Ticketing Study' in 2012 identified that punctuality and getting a seat were (along with the price of the ticket) also the main drivers of value for money.

[3] National Rail Passenger Survey (NRPS). Transport Focus. 2015

measure improvements (for example, the impact of improvement work at stations[4]); and is also used to set service quality targets within a franchise.

We see a clear distinction by journey purpose, with commuters, especially those in the London and South East, being least satisfied. Full details of the autumn 2015 wave are on our website[5]. For ease of reference we have attached our 'at-a-glance' national overview as Appendix 3.

Using regression analysis we can identify those factors that correlate most highly with overall satisfaction and dissatisfaction. We see punctuality being the biggest individual driver of satisfaction and how the industry manages delays being the biggest driver of dissatisfaction.

2.3 *Emotional Tracking*

NRPS is published twice a year but in today's 'always on' society, we know that passengers often use social media for feedback to train operators 'in the moment'. We wanted to tap into this feedback and devise a way of 'taking the temperature' between the waves of the main NRPS survey. To help the rail industry get 'actionable' data from the feedback, we piloted a way to track emotion/sentiment overtime. This involved passengers using an App to select the image of a face that best reflected their journey (i.e. happy, indifferent, angry etc). This has its foundation in behavioural sciences and is a technique widely used in other sections such as retail. We ran the tracker on six routes affected by the London Bridge redevelopment, from December 2015. We gathered comments from passengers on a day-to-day basis. Over the course of four months 364 passengers recorded comments on just under 13,000 journeys.

It is no surprise that the two key factors that drove passenger happiness were being on time and getting a seat. What this survey clearly shows, however, is the volatility of performance – passengers are quickly annoyed by small delays even up to five minutes. Negative emotions also rise rapidly when passengers are not able to get a seat or experience overcrowding so are unable to do what they want to on the train. These negative emotions also tend to be much more intense – suggesting that they could stay in the memory longer. This does have implications for the industry. It suggests that choosing performance measures that incentivise operators to focus on right-time performance (rather than allowing a five minutes threshold) will have a passenger 'payback'; and that the provision of free, reliable Wi-Fi can at least ensure that time spent standing on a train is not completely wasted.

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[4] National Station Improvement Programme. Transport Focus. 2012

[5] http://www.transportfocus.org.uk/research-publications/publications/national-rail-passenger-survey-nrps-autumn-2015-main-report/

2.4 *Trust*

In 2014 we looked at consumer confidence and whether passengers trusted their train company[6]. It shows that, once again, improving the reliability of services is key. However, it also shows improving performance will only go so far and to really unlock the potential 'passenger dividend' requires additional focus on engagement and trust. This includes building direct engagement into industry planning processes (since mentioned in the Bowe and Shaw reviews), using passenger satisfaction metrics in franchises (now included in franchise specifications), honest factual explanations when things go wrong, and making it easier for passengers to claim and get compensation for delays.

## 2 *Specific issues/questions*

The Committee seeks views on a number of specific questions surrounding the passenger experience.

2.1 *Information provided to passengers before, during and after rail journeys, including information provided at stations, in trains and via National Rail Enquiries, operators' websites and online apps (excluding in relation to the process for claiming compensation for a delay/cancellation)*

We have seen above how information, especially during times of disruption, is a priority issue for passengers, and how the way that delays are managed is the biggest driver of dissatisfaction. Our research suggests there are two key aspects to journey planning: building an original journey (checking routes, fares, options etc) and checking to see if a pre-planned or a regular journey is running as it should.

Websites are the starting point for many when planning a journey[7]. Passengers want a website that gives them clear information on which they can make an informed decision, uses language that they understand and instils confidence (primarily that they have bought the right ticket – more below).

Clarity and ease of use also come through as a key issue when speaking to those who do not use rail or who do so infrequently. Our work[8 and 9] shows that the main barriers to increased rail use are an assumption that the door-to-door journey would take longer, a belief that using rail would cause extra "hassle" compared to using the car, and the perceived cost of the ticket. Non

[6] Passengers' relationship with the rail industry. Transport Focus. 2014
[7] Ticket Retailing Website Usability. Transport Focus. 2011
[8] Integrated Transport – perception and reality. Transport Focus. 2010
[9] Transport Integration in Scotland. Transport Focus. 2014

users tend to over-estimate the negatives – i.e. that journeys will take longer, cost more and be less punctual than they actually are. Good journey planning information can help to challenge these perceptions.

Information on planned disruption is another key requirement. Passengers need to know if there is engineering work causing extended journey times or bus replacements. Our latest research (with GWR) looked at passengers' experiences from two sets of planned works, at Reading and Bath Spa, in 2015[10]. It showed that targeted and timely information in advance is key to managing expectations. The more that passengers were aware of the scale of the disruption, the alternative transport provided and the ultimate benefits of the work, the higher their level of satisfaction on the day. It is also an important component of trust and building a relationship with passengers.

Information is also essential during unplanned disruption. At such times passengers need personalised information (i.e. what does the delay mean to me?) so that they can rearrange meetings, alert family members etc. Accurate, timely information can help to empower passengers during such times. Social media (twitter) is increasingly being used by passengers who value the fact that it offers more of a 24/7 facility and, crucially, allows advice to be personalised[11].

We continue to work with the industry on passenger information during disruption (PIDD). Our work originally helped lead to the industry's code of practice and the subsequent licence requirement; more recently we have worked with ORR on measuring compliance[12].

2.2 *Ticketing, including overcoming obstacles to the more widespread delivery of "smart-ticketing" and part-time season tickets*

Many passengers find the current fare structure complicated, confusing and illogical and do not have confidence that they have bought the best-value fare[13]. This is not helped by limitations with Ticket Vending Machines (TVMs) which still do not currently provide passengers with sufficient information on things like ticket validities[14]. Our recommendations from that report still stand:

- guide passengers to the right ticket – don't make them guess
- make sure TVMs can sell the full range of tickets – the industry cites TVMs as an alternative to a booking office, but there are significant gaps

10 Planned rail engineering work - the passenger perspective. Transport Focus. 2015
11 Short and Tweet. How passengers want social media during disruption. Transport Focus. 2012
12 Passenger information when trains are disrupted. Transport Focus. 2014
13 Passenger Focus response to the Government's rail fares and ticketing review. Transport Focus. 2012
14 Ticket Vending Machine Usability. Transport Focus. 2010

- fix the underlying issues with the fares structure

Passengers do not, though, want to trade off choice for complexity – they still want to be offered a range of fares but expect technology to present this in an easy-to-understand manner. Our existing work suggests that a single-leg pricing structure offers the best mix of flexibility and personalisation (e.g. the ability to travel out on a fixed-train ticket and return on a semi-flexible ticket).

New technology is also viewed positively when it comes to purchasing tickets. Smart ticketing is seen as being quicker and easier to use and, through the use of price capping / best fare guarantees, as potentially saving money[15]. One of its key benefits, however, is in the way it could allow for new, tailored products to be introduced – for instance, flexible tickets such as Carnets which reflect today's less conventional working patterns[16]. Equally, technology offers additional fulfilment opportunities whether this be via an app, mobile phone or contactless smart/bank card[17 and 18]. Technology must, though, facilitate the door-to-door journey and needs to give passengers reassurance that they are on the right train at the right time and will not be penalised for ticketless travel. Much, once again, comes down to trust.

2.3 *In-train facilities, including on-journey Wi-Fi and power*

The design of a train will clearly also have an impact on the passenger experience. We have a raft of work looking at what passengers want from new trains[19] [20] [21].

One broad area that does stand out is ensuring the design allows passengers to use their travel time productively. The University of Western England, using NRPS passenger satisfaction data, showed that passengers were increasingly using technology to get more value out of their journey[22]. This means the provision of free Wi-Fi, better mobile phone reception and power sockets become more important. Our passenger priorities work reflects this – with free Wi-Fi being the fourth highest priority for improvement for business passengers – as does our work on emotional tracking.

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15 Smart ticketing – what rail passengers want. Transport Focus. 2013
16 New types of tickets with smart ticketing: what do passengers think about carnets? Transport Focus. 2016
17 Rail passengers and apps: what next? Transport Focus. 2015
18 Smart ticketing - contactless payment for rail. Transport Focus. 2014
19 Thameslink Rolling Stock Qualitative Research. Transport Focus. 2008
20 Future Merseyrail rolling stock – what passengers want. Transport Focus. 2014
21 Designing the future - rolling stock design. Transport Focus. 2011
22 Rail passengers' travel time use in Great Britain. Prof. G Lyons, UWE Bristol. 2012

Our research among passengers on the East[23]and West Coast[24] rail franchises also looked at the on-board offer. On West Coast the main areas for improvement identified were luggage, toilets and Wi-Fi. Passengers wanted to see greater 'personalisation' of their journey so as to help make the most of their time on board – this could include being able to choose from different options in terms of seating, food and entertainment. East Coast passengers also wanted to see better toilets and Wi-Fi.

2.4 *Performance measures in relation to passenger experience, including passenger survey methodologies*

We want to see measurements that make sense to passengers and drive behaviours that they want to see. This includes:

- *Hard targets for punctuality and cancellations*

  The choice of performance targets, measurements and degree of transparency can all help generate trust. At present the PPM measure of performance is based on arrival times at the destination station and allows a 5-or 10-minute threshold before trains are considered late. This does not match passengers' own experiences: for instance they might be late arriving at an intermediate station but the train be classed as on time when it arrives at its final destination[25].

  We know from our research that satisfaction with punctuality starts to drop well before the 'official' 5- or 10-minute allowance has expired. On average, passenger satisfaction with punctuality reduces by between two and three percentage points with every minute of delay. This shows that there is a value in focussing on reducing small sub-threshold delays – for instance, reducing lateness on a train from 4 minutes to 2 minutes may not have an impact on PPM scores but it will on satisfaction. All of which points strongly to the use of right-time performance metrics.

- *Targets for service quality*

  We believe that it is not just a case of 'what' the railway does but of 'how' it does it. Our strong preference is to base this qualitative measure on what passengers say - the best judge of quality being those who have used the services in question.

  The Committee's call for evidence mentions the differences between NRPS and Which? passenger satisfaction research. We offer a bit more background on sample sizes and methodologies in Appendix 2 but essentially the key differences are:

[23] What passengers want from the East Coast rail franchise - An initial submission. Transport Focus. 2012

[24] West Coast trains – what passengers want. Transport Focus. 2016

[25] Train punctuality: the passenger perspective Transport Focus 2015

- NRPS asks passengers to rate the specific journey they are making when given the questionnaire.

- Which? asks passengers to recall journeys they had taken in the previous 12 months. A 'customer score' is then created based on overall satisfaction and the likelihood of recommending the service to a friend.

The fact that they measure different things is mainly responsible for why they record different levels of satisfaction (with Which? typically giving lower scores than NRPS). However, the relative order is consistent – i.e. companies that do well on one do so on the other and vice versa.

We looked at the differences in more detail in 2014. Our research[26] compared three different methodologies: satisfaction with a specific journey, satisfaction on being asked to recall a journey, and satisfaction with journeys in general.

We found that negative journeys tend to stick in the mind longer than good ones and so have more chance of being ones that are recalled. (This is also consistent with the relative intensity of the emotions we monitored in our emotional tracking research). So as surveys move from a specific, in the moment assessment to a more 'recall' based system and then to general perceptions, the lower the level of satisfaction recorded. This difference is not unique to rail. For example, an individual may have a negative view about the NHS or banking sectors and yet their most recent experience of either could be favourable.

As we have mentioned earlier, we see improving trust as one of the ways of closing this gap. A train company that has 'put some credit in the bank' (e.g. through handling delays well, through helpful staff, through providing compensation automatically) may be better able to withstand a period of poor performance.

2.5 *Mechanisms to hold operators to account for poor performance and spread the best practice across the industry*

We have covered this to some extent in the sections above: we want to see a move towards right-time performance and we want passenger satisfaction targets built into franchises.

[26] Passengers' relationship with the rail industry. Transport Focus. 2014

We also want to see levels of accountability to passengers increased. This can include direct engagement. For example, through providing:

- customer reports that combine a clear statement of promises from the franchises operator with regular updates on progress
- greater transparency on performance metrics. Joint research[27] with ORR established that passengers want more information in the public domain. Even when they admit that they will be unlikely to read it themselves they see the value in it being available as it helps keep the operator on its toes. The more the information can be broken down to individual journey – i.e. the ‘my journey’ concept - the more engaged passengers will be. Network Rail has been one of the driving forces behind greater transparency of performance data – for example, making right-time data available on its website - but there is still much more that could be done to provide passengers with personalised data.

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

Appendix 1: *Priorities for improvement*

The table below shows the relative scores at a national level for the top- ten priorities (out of a list of 31) alongside those for commuters, business and leisure passengers.

| | National | | Commuter | | Business | | Leisure | |
|---|---|---|---|---|---|---|---|---|
| **Passenger Priorities for Improvement (top 10 – in order of priority)** | **Rank** | **Index Scores** | **Rank** | **Index Scores** | **Rank** | **Index Scores** | **Rank** | **Index Scores** |
| Price of train tickets offers better value for money | 1 | 494 | 1 | 537 | 1 | 513 | 1 | 440 |
| Passengers always able to get a seat on the train | 2 | 367 | 3 | 282 | 2 | 496 | 2 | 408 |
| Trains sufficiently frequent at the times I wish to travel | 3 | 264 | 2 | 315 | 3 | 239 | 3 | 217 |
| More trains arrive on time than happens now | 4 | 178 | 4 | 218 | 5 | 137 | 5 | 150 |
| Train company keeps passengers informed about delays | 5 | 163 | 6 | 170 | 6 | 133 | 4 | 167 |
| Less frequent major unplanned disruptions to your journey | 6 | 161 | 5 | 198 | 7 | 123 | 7 | 134 |
| Fewer trains cancelled than happens now | 7 | 136 | 7 | 166 | 10 | 105 | 8 | 116 |
| Accurate and timely information available at stations | 8 | 132 | 8 | 133 | 9 | 110 | 6 | 139 |
| Journey time is reduced | 9 | 105 | 9 | 125 | 8 | 111 | 14 | 81 |
| Free Wi-Fi available on the train | 10 | 97 | 12 | 90 | 4 | 143 | 13 | 87 |
| Sample size: 3559 | | | | | | | | |

The priorities are shown as an index averaged on 100. In this case 100 would be the average score should all criteria be ranked equally important. So for example 150 = 50% more important than average, 300 = three times as important as average, 50 = half as important as average

## Appendix 2: Passenger Satisfaction Methodologies

*NRPS measure*

This asks passengers on trains and at stations to assess the specific journey they are making. The sample plan ensures that there is a spread of journeys (e.g. peak/off-peak, weekday/weekends, big stations/unstaffed, journey purpose). Passengers are asked to give a rating to 30+ different criteria as well as an overall assessment of that particular journey. It is conducted twice a year, with each wave being around 28000 passengers.

The results are produced at a train company level, though we can break these down further into routes or ‘building blocks’. Data goes back to 1999 so it forms a long time-series that can be used to identify trends both within a train company and between train companies.

By virtue of knowing which services are being surveyed we can also link the satisfaction scores with other factors. For example, we have a body of research that allows us to correlate passenger satisfaction with punctuality on a particular train with the actual punctuality of that same train.

*Which? survey*

Which? asked 7000 passengers about their train journeys during the past 12 months.

This includes levels of satisfaction with around 10 criteria as well as overall satisfaction. They then create a ‘customer score’ based on overall satisfaction and the likelihood of recommending the service to a friend.

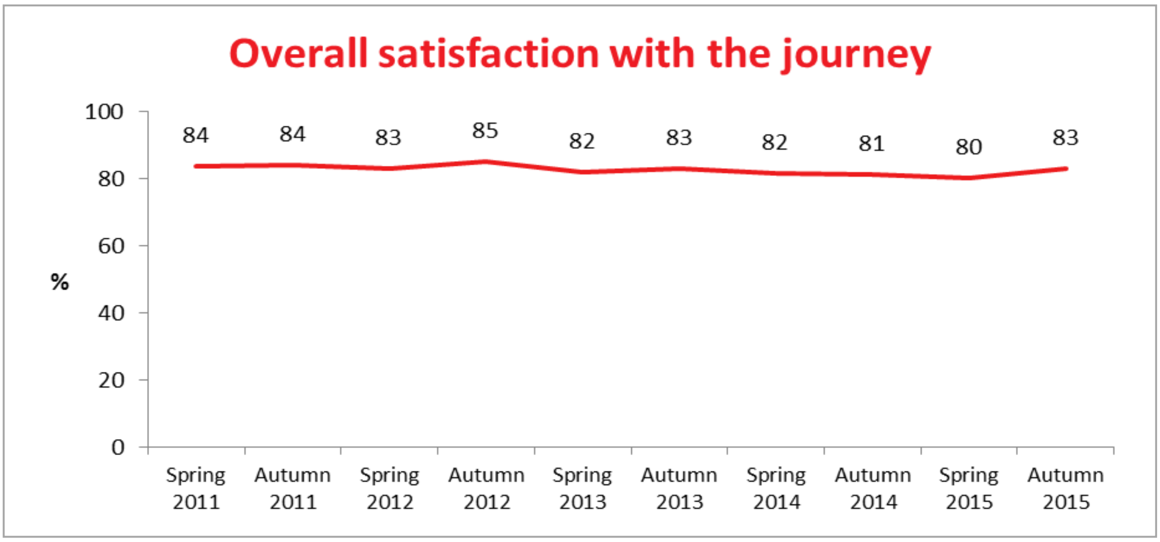
This survey is now in its third year.

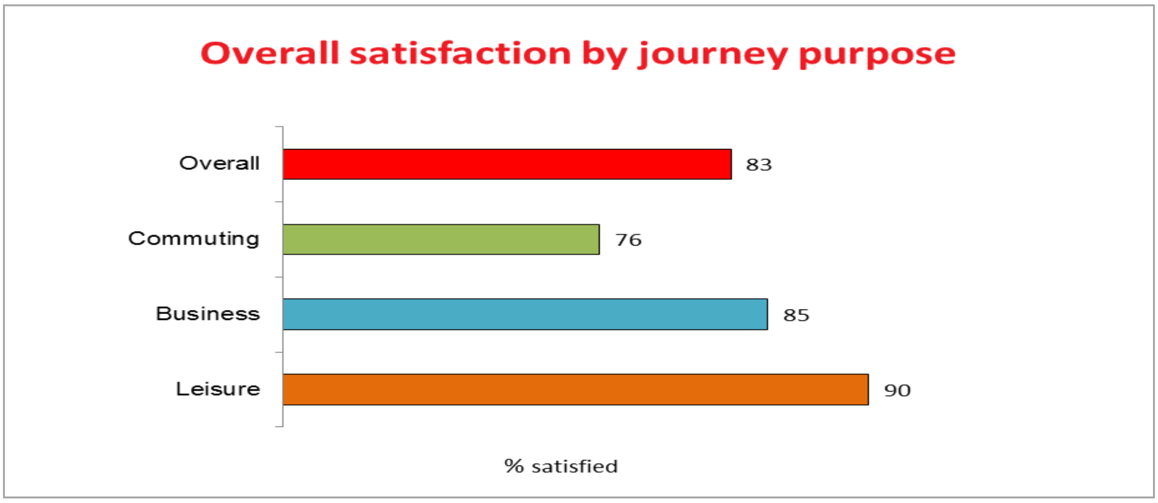
# Appendix 3: Rail Passenger Satisfaction at a glance: Great Britain - Autumn 2015

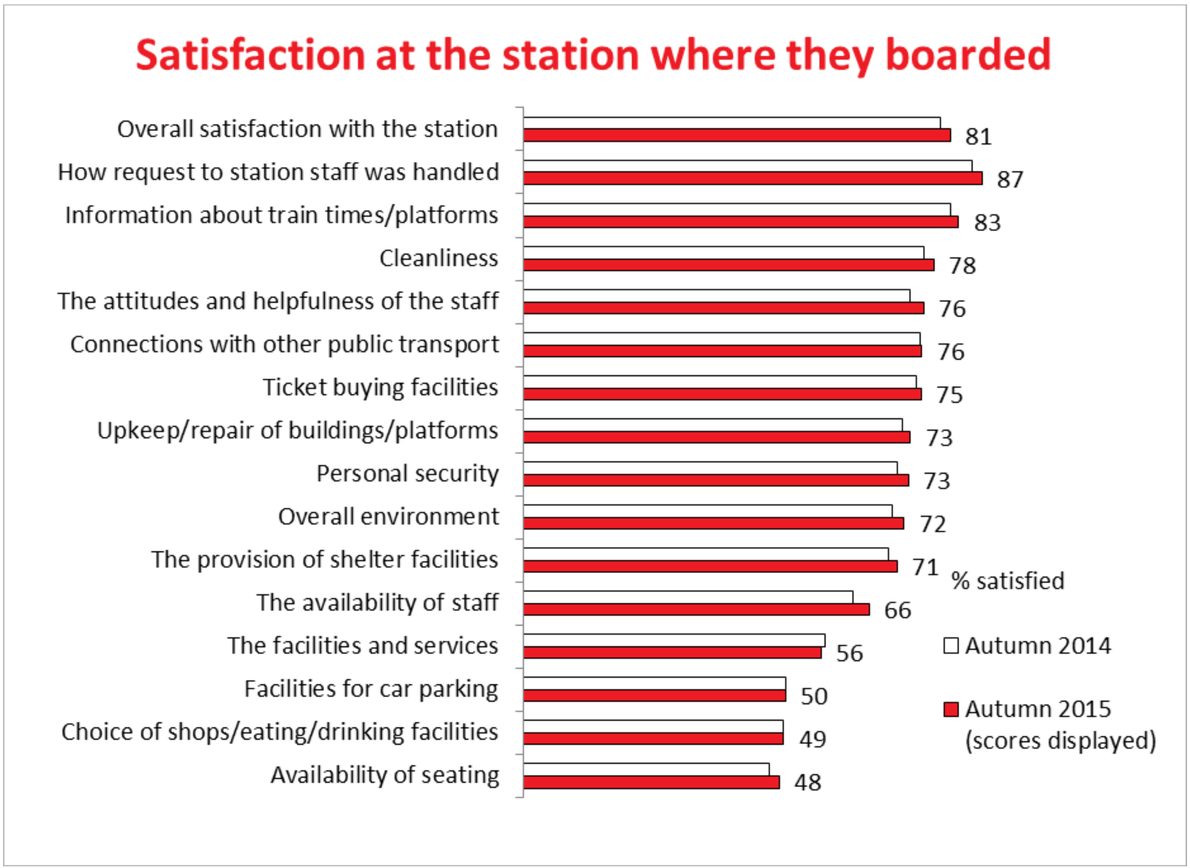
Transport Focus is the independent transport-user watchdog. Our mission is to get the best deal for transport users. In spring and autumn we carry out the National Rail Passenger Survey (NRPS), a network-wide picture of passengers' satisfaction with rail travel in Great Britain.

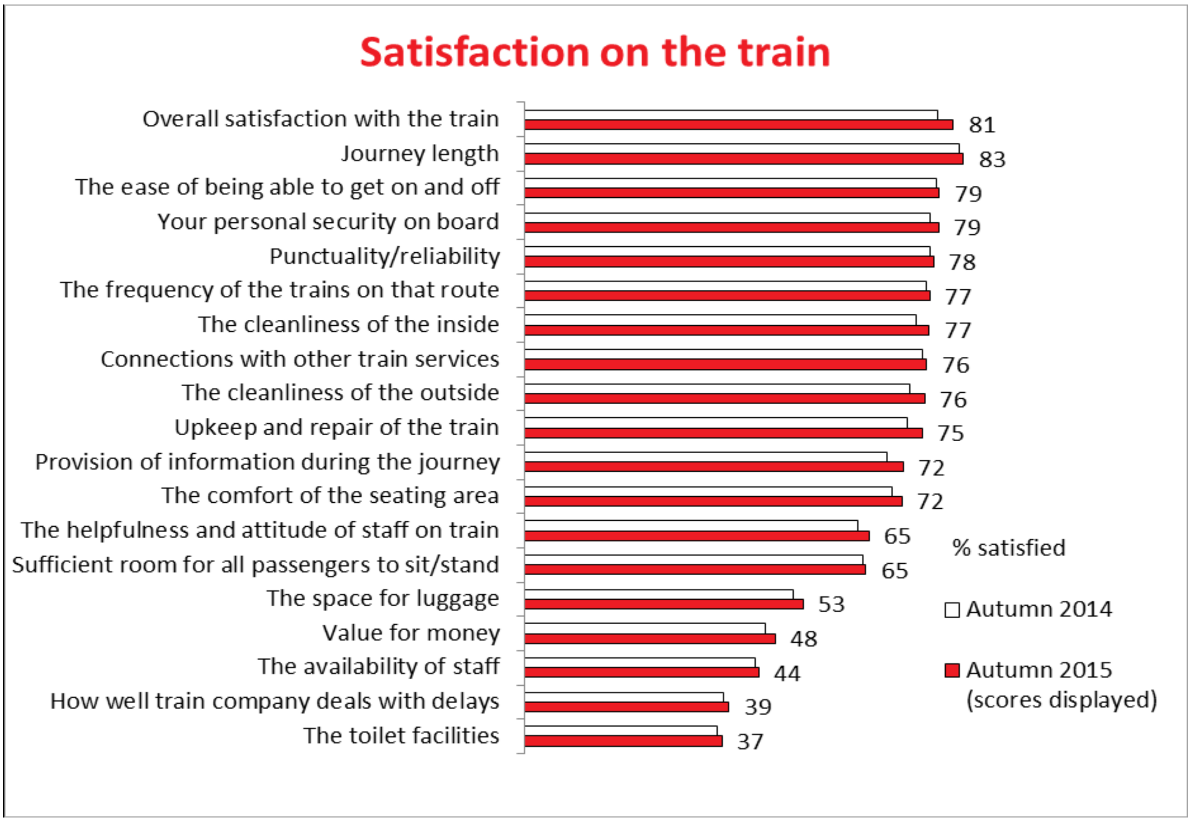
We ask passengers for their views of the specific journey they are making at the point they are surveyed, both in general and on a number of specific areas regarding the station, the train and the service received.

Nationally each survey covers around 30,000 passengers. This page shows the headlines. Page 2 shows satisfaction with individual aspects of the station and the train. Page 3 looks at some factors in a bit more depth. The last page shows which factors have the biggest effect on satisfaction and dissatisfaction.

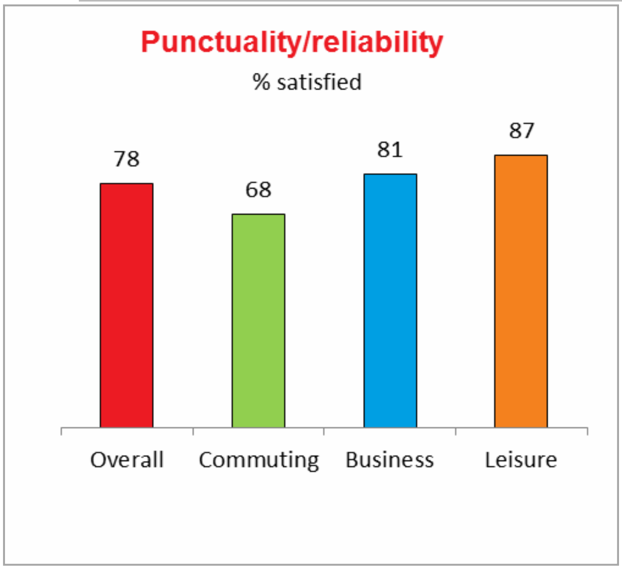


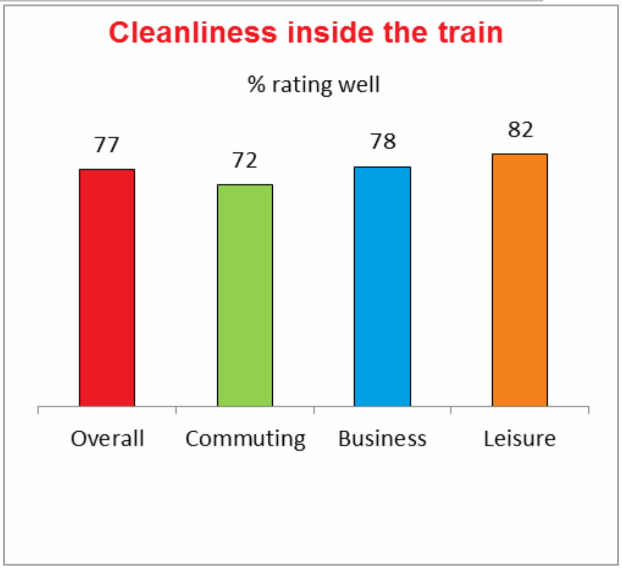



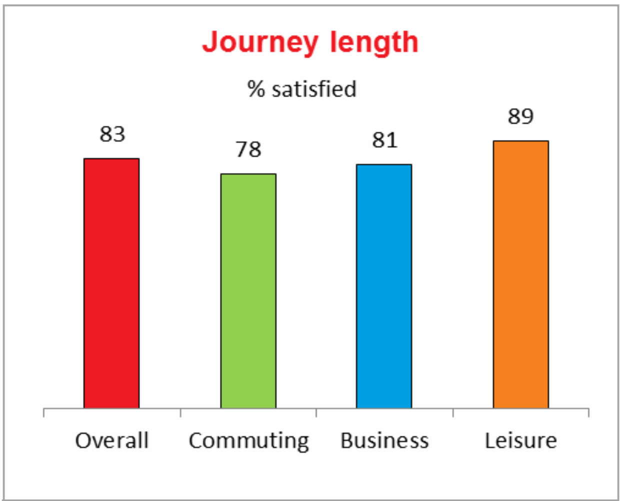

Satisfaction at the station where they boarded
Overall satisfaction with the station
How request to station staff was handled
Information about train times/platforms
Cleanliness
The attitudes and helpfulness of the staff
Connections with other public transport
Ticket buying facilities
Upkeep/repair of buildings/platforms
Personal security
Overall environment
The provision of shelter facilities
The availability of staff
The facilities and services
Facilities for car parking
Choice of shops/eating/drinking facilities
Availability of seating
81
87
83
78
76
76
75
73
73
72
71
66
56
50
49
48
% satisfied
Autumn 2014
Autumn 2015 (scores displayed)

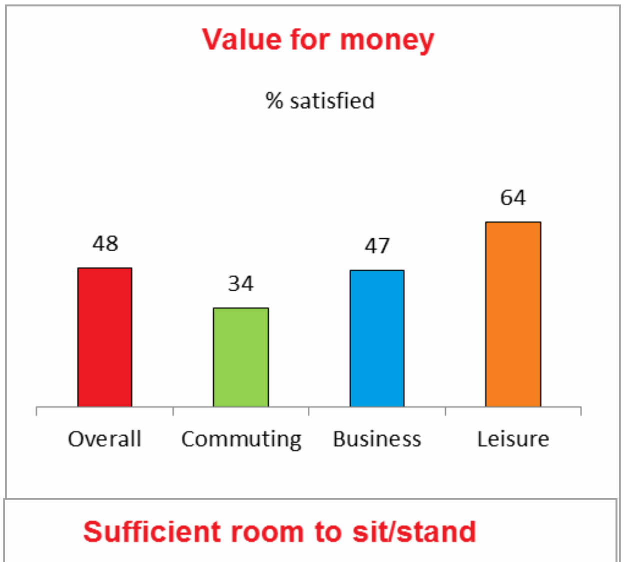

Satisfaction on the train
Overall satisfaction with the train
Journey length
The ease of being able to get on and off
Your personal security on board
Punctuality/reliability
The frequency of the trains on that route
The cleanliness of the inside
Connections with other train services
The cleanliness of the outside
Upkeep and repair of the train
Provision of information during the journey
The comfort of the seating area
The helpfulness and attitude of staff on train
Sufficient room for all passengers to sit/stand
The space for luggage
Value for money
The availability of staff
How well train company deals with delays
The toilet facilities
81
83
79
79
78
77
77
76
76
75
72
72
65
65
53
48
44
39
37
% satisfied
Autumn 2014
Autumn 2015 (scores displayed)

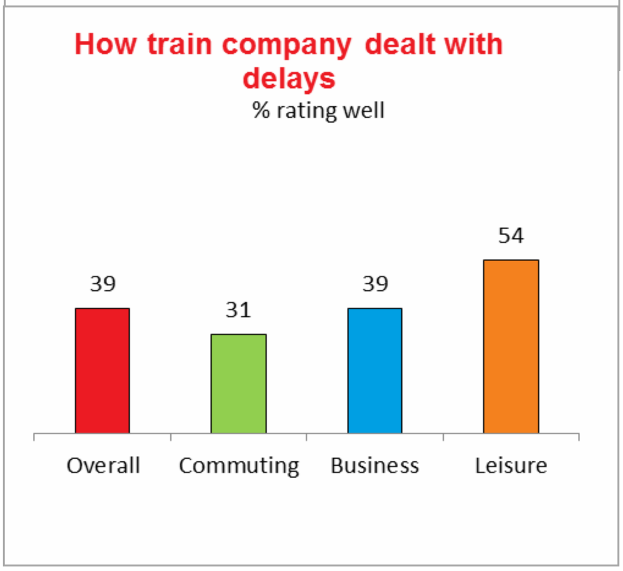
## Satisfaction - in a bit more depth (Autumn 2015)

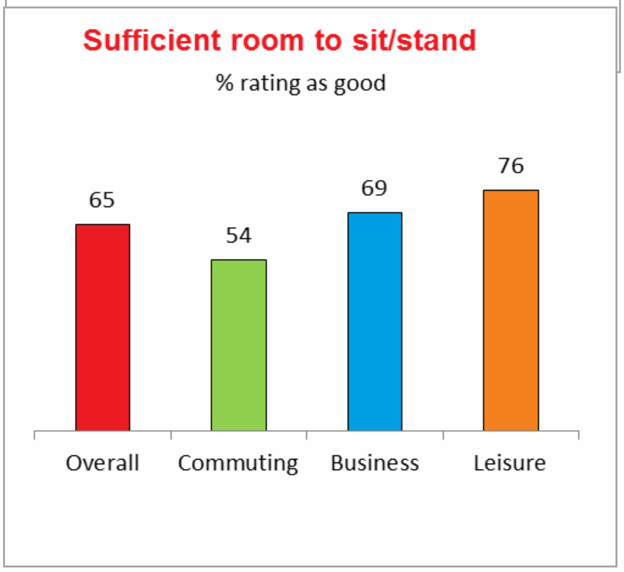


## What impacts on satisfaction and dissatisfaction?

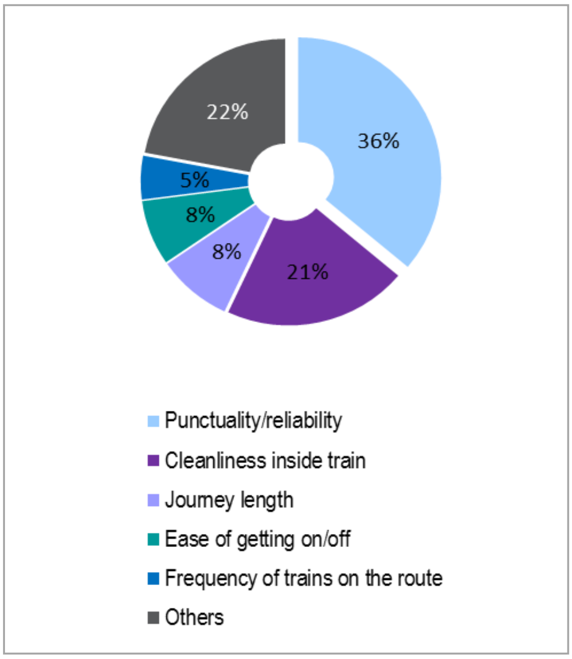
Not all factors will have equal importance - some things will have a much bigger influence on whether a passenger is satisfied with the overall journey than others.

The charts below show which station and train factors are statistically most important in determining overall passenger satisfaction and dissatisfaction.

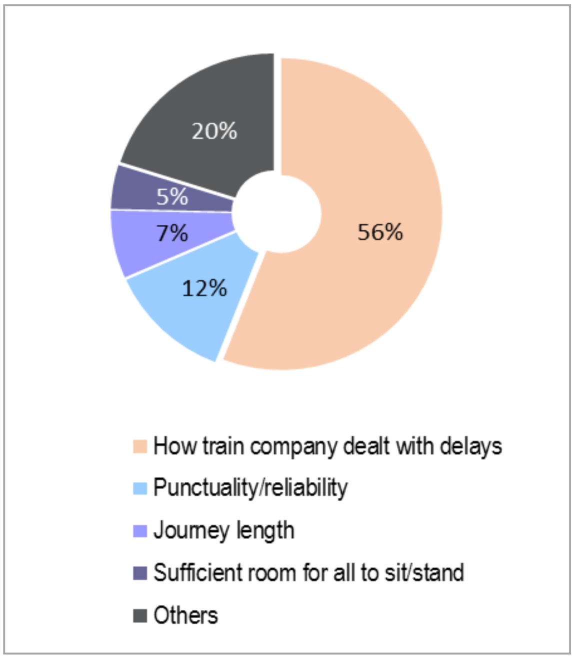
The analysis looks at which factors correlate most highly with overall journey satisfaction. For example, if those satisfied with punctuality are much more likely to be satisfied overall, then punctuality is likely to have a bigger impact on overall satisfaction. The higher the percentage figure below, the greater the influence on overall journey satisfaction.

These charts show that punctuality remains the biggest single influence on satisfaction, and that the way delays are handled by TOCs has a strong influence on dissatisfaction. If looked at over time, we would see the impact of punctuality has actually decreased, while cleanliness of the inside of the train has increased.

### What has the biggest impact on overall satisfaction?




### What has the biggest impact on overall dissatisfaction?




To download the full National Rail Passenger Survey, visit:
[http://www.transportfocus.org.uk/research/national-passenger-survey-introduction](http://www.transportfocus.org.uk/research/national-passenger-survey-introduction)

You can explore the results in more depth at:

[http://www.transportfocus.org.uk/our-open-data](http://www.transportfocus.org.uk/our-open-data)