

South Eastern rail franchise: what passengers want

April 2017

Introduction

Passengers, now the majority funders of the railway, should be at the heart of all decisions. This includes new franchise deals.

We believe that passengers' views should be understood before new services are specified, and their interests placed at the heart of the contract. That's why we carried out bespoke research into the passenger perspective, to supplement the data we already have from existing research.

The South Eastern franchise, currently operated by Govia as Southeastern, ends in December 2018. The Department for Transport (DfT) is running a competition to find an operator for the next franchise. As part of the consultation process, the DfT asked Transport Focus to carry out research to understand passengers' current experiences and explore their needs and aspirations for future South Eastern services.

We carried out focus group research in November 2016, and found that passengers placed a strong emphasis on the need to focus on getting the basics right, before considering additional areas that would make travelling on the South Eastern franchise a good experience. These core needs may have tempered expectations among passengers, compared with a franchise where the essential requirements are already adequately being met. Also, the fieldwork was carried out against the backdrop of the extended disruption to Southern services. This created a feeling, explicitly expressed during focus groups, of "at least it's not us".

Whilst passengers are broadly satisfied with service factors such as frequency and timings, they see delivering a punctual, reliable train service with sufficient capacity as a key priority for improvement, along with the way disruption is handled. These requirements are important for all types of passengers, but especially for commuters, particularly on Metro and Mainline services, as they don't think their service meets these basic needs sufficiently.

Where passengers' basic needs are generally met, they start to focus on what would improve the quality of their journey. Passengers highly value staff presence and visibility, and they would like to see this enhanced. Helpful, informed staff on stations and on trains would help to improve satisfaction with handling disruption and perceptions of personal security, which are both seen as important areas for improvement.

Passengers would like to see cleaner, more comfortable trains that allow them to use their time productively. Station facilities were identified as being in need of improvement, even at the most basic level such as provision of shelter. Wi-Fi and plug sockets on trains are seen as being nice to have, but it is more important to get the basic service right first.

Perceptions of the High Speed service are markedly different. Passengers view it as a premium product, being cleaner and smarter, with better reliability and comfort, as well as shorter journey times. Given that the basic needs of passengers using High

Speed seem to be broadly met, expectations shift. For example, Wi-Fi provision is increasingly seen as a core requirement.

Most passengers find fares too expensive, with commuters often describing them as extortionate. But because they don't believe that they can change much about the cost of travel, their expectations for improvement shift towards getting a good service for their money.

Our research clearly identifies passengers' key requirements for improvement from the next South Eastern franchise:

- punctuality and reliability
- dealing with disruption
- capacity and crowding
- environment and staffing at stations and on trains
- ticketing and value for money.

We will now work with the DfT to highlight these, and other issues, and to seek a franchise specification that reflects passenger needs and provides a framework for prospective bidders to propose ambitious and high-quality proposals.

Key findings

The following sections summarise the key findings we identified. We reference Autumn 2016 National Rail Passenger Survey (NRPS)¹ results and other research for context where appropriate.

Getting the basics right: punctuality and reliability

Punctuality, reliability and how disruption is dealt with are highly important across all passenger types, but particularly key priorities for commuters, most of whom feel their basic needs aren't met, in these areas.

Although High Speed services are seen as more punctual, Metro and Mainline services are seen as being frequently delayed. Commuters in particular say that delays are too frequent and too long. The NRPS reflects this discrepancy: currently, 68 per cent of Southeastern passengers are satisfied with punctuality and reliability, in line with the London and South East sector average of 69 per cent. However, the Southeastern overall score includes passengers using High Speed, of whom 75 per cent are satisfied with punctuality and reliability.

Punctuality and reliability is of critical importance to passengers, and particularly to commuters. Our research, *Train punctuality: the passenger perspective*², demonstrates a clear link between punctuality and overall satisfaction, which declines one and a half percentage points for every minute of lateness for all passengers and three percentage points for commuters. Southeastern passengers told us:

- they could tolerate an occasional delay of up to five minutes but where this occurs more frequently it becomes annoying
- delays of five to 10 minutes can be frustrating, especially when they cause missed connections
- delays of more than 10 or 15 minutes are likely to have a major impact
- disruption also increases other problems, such as overcrowding.

Concerns with performance are felt more acutely by commuters than by leisure or business travellers. Many leisure and business users find delays less frequent in off-peak hours and these also tend not to cause such significant overcrowding. In addition, leisure passengers often feel less time sensitive so are not so frustrated by minor delays. The NRPS shows that 72 per cent of Southeastern passengers travelling off-peak are satisfied with punctuality and reliability, compared with just 62 per cent of passengers travelling in the peak.

¹ *National Rail Passenger Survey*, <http://www.transportfocus.org.uk/research/national-passenger-survey-introduction>

² *Train punctuality: the passenger perspective*, November 2015
<http://www.transportfocus.org.uk/research/publications/train-punctuality-the-passenger-perspective>

Our 2014 research, *Rail passengers' priorities for improvements*³, found that 'more trains arrive on time than happens now' is the fourth highest improvement priority for Southeastern passengers. This is closely followed by 'less frequent major unplanned disruptions to your journey' and 'fewer trains cancelled than happens now'. These factors come in at around twice the importance of the average. 'Journey time is reduced' is the tenth highest priority and is of average importance to Southeastern passengers.

Dealing with disruption

Information provided during disruption and measures taken to reduce the frequency and impact of delays are seen as major areas for improvement for the South Eastern franchise.

Southeastern passengers told us that staff are often unable to provide vital information at times of disruption. Even when information is available, passengers distrust its accuracy, both in the expected times of train arrivals and in the reasons given for disruption. They don't feel that Southeastern takes sufficient responsibility for disruption, or adequate steps to avoid it in the first place.

The way Southeastern acts to reduce the impact of disruption is also an important area to improve. Our research revealed a perceived lack of measures that would help reduce the frequency and impact of delays. For example, passengers would welcome being able to use High Speed services when there is disruption elsewhere on the network. They would like to see more investment in the network to allow it to better deal with causes of delay outside its immediate control, such as weather.

The new operator must be seen to take action to eliminate causes of delays within its control, such as staff shortages. Running trains with the maximum number of carriages during periods of disruption would also help alleviate overcrowding issues arising as a knock on effect of delays and cancellations.

Passengers are frustrated with a lack of quality, accurate information during disruption. They want to know how long the delay will last, when the next trains will run and details about alternative routes with the likely impact on travel connections. They want to see accurate, real-time, GPS-based trackers presented on apps and screens to show the progress of trains. They want regular announcements, and they would like to see staff taking ownership of disruption situations, apologising for the inconvenience and being honest about how they are able to help.

Southeastern's NRPS satisfaction score for 'usefulness of information during delays' is 40 per cent, close to the 41 per cent for the London and South East sector – in itself a low score. Satisfaction with how the train company dealt with delays is 29 per

³*Rail passengers' priorities for improvements*, October 2014
<http://www.transportfocus.org.uk/research-publications/publications/rail-passengers-priorities-for-improvements-october-2014>

cent, lower than the sector average at 33 per cent. It is noteworthy that for this factor, dissatisfaction on Southeastern is higher than satisfaction, at 34 per cent.

Previous research looking at passengers' relationship with the rail industry⁴ demonstrates the need for operators to get the basic service right to start with, before they can focus on building a trusting relationship with passengers. It shows that net trust in the service provided by Southeastern stands at -23 per cent, against an industry average of -14 per cent⁵. Net trust in the relationship passengers have with Southeastern is also low, at -19 per cent, compared to an industry average of minus six per cent. It is important that the new franchisee works to address this lack of faith in the ability to run an effective service, and to build a positive relationship with passengers.

Capacity and overcrowding

Train capacity, in terms of having sufficient space to sit or stand comfortably, is a key priority area for commuters. Passengers would like to see more seats and more space, and if this isn't achievable within the current service pattern, would like an increase in frequency of trains to allow for this. It is important to prioritise providing full-length trains during peak periods.

Aside from the need to provide more carriages, passengers feel that many of the current trains are not well designed to maximise the use of the space available. This issue manifests itself in a number of ways. For example seats that are too small to fit the number of people they are designed for with very little space to stand between seats and a lack of provision for standing passengers to hold on to something. Passengers don't think that the most suitable types of trains are selected for use during rush hour.

Passengers' needs vary according to the length of journey they are making. People who use Southeastern Metro services to make short journeys, typically with a maximum length of 15 to 30 minutes, often express a pragmatic view about the need to provide more space to stand in comfort. They recognise that the design of trains used on London Overground services compromise on the number of seats, but provide a smoother journey overall in terms of the ease of getting on and off and the space to move around. Lack of sufficient standing space is experienced by passengers as physical discomfort, and in some cases is even seen as a safety issue.

However, for journeys longer than 15 minutes, many Southeastern passengers start to prioritise the need to get a seat, and for most making journeys longer than 30

⁴*Passengers' relationship with the rail industry*, August 2014

<http://www.transportfocus.org.uk/research-publications/publications/passengers-relationship-with-the-rail-industry>

⁵Passengers were asked to rate their perception of the operator on five factors relating to service delivery. The net score is the difference between those who had positive attitudes and those who had negative opinions.

minutes this becomes a requirement. They see a seat as being part of what they pay for, and failing to deliver this drives dissatisfaction.

The NRPS reinforces overcrowding as a particular area of concern for commuters on Southeastern. Only 37 per cent of peak-time Southeastern passengers are satisfied that there is sufficient room to sit and stand, compared with 76 per cent in the off-peak. Overall, 62 per cent of Southeastern passengers are satisfied against a London and South East sector average of 65 per cent.

Our priorities for improvement research found that 'passengers are always able to get a seat on the train' is the second highest priority for improvement for Southeastern passengers, at three times the average importance. It's closely followed by 'trains sufficiently frequent at the times I wish to travel', another way of addressing capacity issues.

In 2016 we carried out some research into how passengers feel during their journey⁶. This showed that crowding is a significant contributing factor to negative emotions – second only to delays. Within that, we can see that passengers become increasingly angry and frustrated when they are not able to do what they want, for example, if they are not able to use their smartphones because of overcrowding.

The new operator must look seriously at how to address these issues, and work to provide a consistent level of space and comfort, appropriate to the journey type, that allows passengers to make the most of their time onboard.

Environment and staffing at stations and on trains

Southeastern passengers find many stations to be unsatisfactory in meeting their basic needs. This is felt more acutely by leisure passengers than commuters, as they tend to spend more time at stations. Facilities such as toilets, waiting rooms and shelters are often seen as not being good enough. Provision of retail and refreshments is seen as variable at stations across the network, but the research showed that its importance is secondary to the more pressing issues.

Many find that the shelter provided does not offer protection from wind, rain or cold, and in any case is insufficient at busy times. Even at Rochester, a brand new station, passengers like the station building itself but find the platforms spartan and exposed to the elements. This is reflected in NRPS satisfaction scores with 'the provision of shelter facilities' where, at 68 per cent, Southeastern is among the lowest scoring operators nationally.

Toilets are often seen as being unclean, shut at the times people want to use them or absent altogether. Passengers think that stations should have clean toilet facilities available. Satisfaction with toilet facilities on trains is just 28 per cent, against a sector average of 35 per cent.

⁶*How rail passengers really feel*, June 2016 <http://www.transportfocus.org.uk/research-publications/publications/rail-passengers-really-feel>

We know that passengers welcome face-to-face contact with members of staff. Our research tells us that passengers would like to see at least one member of staff at each station whenever a train service is running. In general, passengers' experiences of staff is mixed, with a feeling that additional customer service training would be helpful, and that staff can be 'short' when dealing with 'difficult' passengers. Training should help staff in being more proactive in helping people with disabilities.

It is important that staff have access to the most up-to-the-minute information, especially during times of disruption, and that they are suitably empowered to be able to make decisions in the interests of passengers. Satisfaction with the availability of staff on board trains is low, at just 28 per cent, compared with a sector average of 35 percent. Satisfaction with staff availability at stations is 69 per cent for Southeastern and 65 percent for the sector.

Some passengers express concern about their personal security when using stations and trains, especially in the evenings or after dark. This is seen to be caused by a lack of lighting in underpasses, stations and station car parks, as well as the absence of visible staff at stations and on trains. Using smaller, more remote stations can feel particularly daunting for some passengers after dark, where there is no obvious means of getting help and there are few other passengers around for support. This issue is also reflected in the NRPS. The London and South East average for 'satisfaction with your personal security whilst using the station' is 72 per cent, whereas Southeastern scores 69 per cent. Passengers want a visible member of staff present, better lighting, help buttons and CCTV to address their safety concerns.

On trains, aside from on High Speed services, cleanliness is often seen as not good enough, and toilets are often unclean or out of action. Once these more basic factors are addressed, only then do passengers emphasise a desire for additional useful features such as plug sockets and Wi-Fi.

Overall satisfaction with the station environment stands at 69 per cent, against a sector average of 72 per cent. Satisfaction with the train is 76 per cent for Southeastern and 79 per cent for the sector as a whole.

Ticketing and value for money

The cost of rail travel is a big concern for many Southeastern passengers. While they are resigned to believing that prices won't come down, they want to see the amount of money they pay reflected in the quality of service they get.

In particular, season ticket holders feel that they should get something back, such as loyalty discounts, and should be able to see how the money they pay is being invested in improving the service. Taking note of this could be a good opportunity for the new franchise holder to build a relationship and level of trust with its core customers.

Passengers were broadly satisfied with the range of tickets on offer. Certain types of passengers, however, would like to see tickets more tailored to their needs.

Part-time commuters feel they should get some benefit as regular passengers, albeit not at the same level of discount as a full season ticket. Young people aged 16 and over, but still in education, feel penalised by having to pay adult fares. With education now being compulsory until 18, it is important to find ways of making 'school' travel affordable. Some passengers would like to see an incentive for travelling on early morning trains, to reduce the strain on the busiest periods.

There is a significant amount of interest in a 'smarter' alternative to current paper ticketing. Many passengers outside the Oyster zone would like to see a similar mechanism for paying available to them. This chimes with other research we have carried out which indicates that passengers find the ticket purchasing experience complex and uncertain⁷. Across all groups of passengers there is a desire to make the ticketing process smoother, easier and more convenient. People want to see innovation that will deliver improvements to each stage: purchasing a ticket, ticket types (such as smart and e-tickets) and in providing relevant journey updates after the purchase has been made.

Overall, there is a sense that passengers (particularly commuters) should be getting a fairer deal for the quality of service they get for their money. Overall satisfaction with value for money on Southeastern is at 36 per cent, with higher dissatisfaction at 40 per cent. This is even starker for commuters, at 25 per cent satisfied and 51 per cent dissatisfied. The sector average is 43 and 34 per cent respectively.

⁷ <http://www.transportfocus.org.uk/research/smarter-travel>

What next?

Our aim is to ensure that passenger interests are placed at the heart of the next South Eastern franchise. The findings from this research provide a useful insight into passengers' current experiences and their aspirations for the future.

We will be drawing on this, alongside our wealth of other research, to inform further work on the franchise. This will include ongoing dialogue with the DfT as they develop the specification, a formal response to the Government's consultation and discussions with bidders as they shape their proposals.

The full research agency report of the qualitative research with South Eastern passengers is available on our website.

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