



The future of the Wales and Borders rail service: what passengers want

June 2017

Introduction

Passengers should be at the heart of all decisions about public transport. This includes the new deal to develop and operate the Wales and Borders rail service.

The current Wales and Borders franchise, operated as Arriva Trains Wales, ends in October 2018. Transport for Wales (TfW) is running a competition on behalf of the Welsh Government to find an 'operator and development partner' for the rail service, and is expecting to award a contract in December 2017 for the next service. As part of the consultation process, TfW asked Transport Focus to carry out research to understand passengers' current experiences and explore their needs and hopes for future Wales and Borders services. The Department for Transport (DfT) also funded some additional work to understand the specific needs of passengers in the Borders area.

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 focus group research in March 2017 to understand the passenger perspective based on the current service, to supplement the data we already have from existing research.

Summary

Passengers find the current service outdated and in need of investment compared with their experiences of using other operators.

Overview

Passengers would like to see the operator of the new franchise to have a very local focus and 'non-corporate' feel. Current passengers often speak highly of local staff members. They recognise the big gaps in the network between North, Mid and South Wales, and would like to see more of a coherent organisation behind the provision of transport services in Wales. Overall, passengers want the basics fixed before focusing on advanced improvements and a significantly enhanced service. Passengers see these as the overarching themes, which are manifested in a number of day-to-day concerns.

The reasons passengers choose to use Arriva Trains Wales services are similar to those for other operators. Driving (and parking) is seen as expensive, time consuming and more stressful than taking the train, although for group travel it can be cheaper. Buses are useful for short journeys, but where the train is an option it is seen as preferable due to speed, predictability and comfort. Coaches for longer journeys are perceived to be cheaper, but also slower, more unpredictable and seldom an





enjoyable journey experience. Many parts of the rail network are rural, and local people stress the value of the train service to their communities, feeling that it is an asset they are grateful to have.

Capacity and overcrowding

The top priority for improvement for Arriva Trains Wales passengers is capacity. Passengers want to be able to get a seat, and having to stand often makes for a less satisfactory journey. In places, and at certain times, they experience severe overcrowding where they start to feel unsafe. Sometimes they are not even able to board the train at all.

Issues with capacity are exacerbated by passengers' perception that the current operator hasn't addressed known crowding issues, or planned sufficient additional capacity for things like special events and seasonal demands. The new operation should demonstrate how it will alleviate particular pinch points, respond to occasions like sporting events and offer a service that will cater for the needs of both tourists and local passengers.

Punctuality and reliability

Delivering a punctual and reliable service is fundamentally important. Whilst passengers feel that there is rarely severe disruption on the Arriva Trains Wales network, many feel ground down by persistent punctuality problems. Even though the actual delays are usually small, being five or 10 minutes late day-in-day-out becomes frustrating, and erodes passengers' trust. TfW should look to the new operator to deliver a service that people can truly rely on.

Services and quality

Overall, passengers would like to see the standard of service raised. Passengers particularly find the quality of the trains themselves to be poor, made worse by inadequate cleaning and maintenance. There are similar issues at stations, where poor lighting and upkeep in places leads to concerns about personal security. It is these factors that have helped

fuel perceptions of the current operator being out of touch with the needs of passengers.

This includes the longer-distance services, for example, South to North Wales and into North West England, where passengers find the journey to be long and slow, and the service sub-standard, compared to what they experience on other operators.

Relationship between the operator and passengers

Passengers highly value staff at stations and on trains, and our research shows that Arriva Trains Wales passengers often rate their local staff highly where they are present, finding them friendly and helpful. Passengers see them as being 'on their side' – but often don't associate the personal face with the 'corporate' train operator. Many passengers would like to see the staffing levels 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.

Tickets, retailing and value for money

The research revealed mixed opinions about ticket prices, with some passengers finding their local journey to be relatively inexpensive, but some finding longer journeys rather pricey. But passengers consider the overall service on offer when assessing whether they receive value for money. Given the service currently provided on many routes, passengers believe that considerable improvements need to be made to capacity, punctuality and quality before they could start to consider that they receive value for money for the price of their ticket.

Conclusion

Our research clearly identifies passengers' key requirements for improvement from the next operator of the Wales and Borders rail service:

- capacity and overcrowding
- punctuality, reliability and dealing with disruption
- replacing trains and improving stations
- tickets, retailing and value for money
- staffing, and passengers' relationship with the operator.

We will now work with TfW to highlight these, and other issues, and to seek a future for the rail service that reflects passenger needs. We will also work with the shortlisted bidders to encourage them to respond with ambitious and high-quality proposals that offer passengers the future services they want and deserve.

Key findings

The following sections explore the key findings we identified in our focus group research with Arriva Trains Wales passengers. We reference National Rail Passenger Survey (NRPS) Autumn 2016¹ results, and other passenger research for context where appropriate.

Capacity and overcrowding

Concerns about capacity come up time and time again in this research. Rail passengers right across the Wales and Borders network feel that there is all too often simply not enough capacity on their route. This manifests itself in different ways, from commuters suffering severe overcrowding on their daily journey to work, to sports fans heading to a big match struggling to get on a packed train, to families unable to sit together on a holiday to the seaside. Many services run with insufficient seating and too little space for buggies, wheelchairs and luggage.

Passengers would like to see more seats and more space to alleviate these problems. It is important to prioritise providing trains of appropriate length during peak periods, and provide a service frequency that anticipates potential demand. All too often, the number of carriages provided falls woefully short in relation to the demand.

Our 2014 research, *Rail passengers' priorities for improvements*², found that passengers' ability to always get a seat on the train is the number one priority for improvement for Arriva Trains Wales passengers, at nearly five times the average importance³.

The NRPS reinforces overcrowding as a particular area of concern for Arriva Trains Wales passengers, highlighting the different issues for the various types of passenger. On Cardiff and Valleys services, 53 per cent of commuters are satisfied with the amount of space to sit or stand, compared to 65 per cent for all passengers. Looking at Arriva Trains Wales Inter Urban services, 65 per cent of weekday passengers are satisfied with space to sit or stand, but this falls to 54 per cent on Saturdays. The sample sizes are too small to break down by journey purpose or day for other routes, but for Arriva Trains Wales in general, 77 per cent of business and 78 per cent of



¹ National Rail Passenger Survey, Autumn 2016. We compare against the average for operators with a similar profile, which we call the 'regional sector'.

² *Rail passengers' priorities for improvements*, October 2014

³ We ask passengers about the level of priority they place on improving 31 factors, and assign an index of priority level averaged on 100. An index of 300 is three times as important as the average and an index score of 50 is half as important as the average.



leisure passengers are satisfied with the amount of space to sit or stand, but just 55 per cent of commuters. The average for satisfaction with space to sit or stand with Regional operators overall is 72 per cent.

Our research among Arriva Trains Wales passengers illustrates the range of concerns about capacity among different types of passenger.

Commuters across the network find crowding to be a daily problem, but especially in the urban centres of South Wales, and North Wales and the Borders. The aged nature of the rolling stock, carrying far more passengers than the number of seats available, makes for an uncomfortable journey and, at times, passengers even feel unsafe. They also express frustration when they see off-peak services with more carriages than the busy service they use to get to and from work.

In Mid Wales and in parts of North Wales, the issues are more seasonal. Passengers would like to see extra capacity to anticipate and cope with the extra demand during the busy tourist season. For the leisure passengers using these services, their choice of travel mode is likely have a high degree of discretion. If the train service isn't an attractive option – for example, if families are unable to sit and spend time together due to crowding – they may choose to drive instead.

Passengers in the Borders often find peak-time services to be crowded, but also regularly at certain other times. For example, the last Saturday night train from Birmingham can be 'unbearable'. Given that these issues occur regularly and are well-known, passengers struggle to understand why nothing has been done to improve capacity on these services.

Passengers across the network highlight dealing with special events and other particularly busy occasions when crowding becomes a real issue. Examples include sports matches and

university term times. Passengers do not understand why the current operator has, for whatever reason, been unable to address issues that they know are commonplace. Such events are well-publicised, people's travel plans are predictable and so there ought to be plans in place to provide the additional capacity to anticipate potential demand. Passengers again cite concerns with discomfort or even safety due to crowding at such times, or even recall times when they haven't been able to board the train.

In 2016 we carried out some research into how passengers feel during their journey⁴. 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 use their time effectively, for example, if they are not able to use their smartphones because of overcrowding.

The new operation must look seriously at how to address the capacity issues across the network, and strive to provide a consistent level of space and comfort, appropriate to the journey type, that allows passengers to make the most of their time on board.

Capacity concerns aside, the research doesn't show that the frequency of services is a top priority for improvement in itself, apart from a need for additional later evening and weekend services. Passengers in North Wales also want more trains in peak hours. However, in Mid Wales, people value their recent increase in service frequency. Passenger usage at many stations, such as Welshpool, has increased significantly since the improvements, demonstrating the demand for a more frequent service.

Punctuality, reliability and dealing with disruption

Punctuality, reliability and how disruption is dealt with are highly important across all passenger types, but particularly key priorities for commuters. Persistent delays to services on parts of the Arriva Trains Wales network have diminished the expectations of passengers. Instead of just frustration, for some passengers the research reveals a feeling of despondency that the issues have been persistent for years and the service doesn't seem to be improving.

Commuters using Arriva Trains Wales services in South Wales (especially those using the Valleys routes into Cardiff) and around the urban centres of the North Wales and Borders area appear to be the hardest hit by these persistent issues with punctuality. Their basic needs are simple: they want a service that they can rely on to get them to work on time.

⁴ *How rail passengers really feel*, June 2016 <http://www.transportfocus.org.uk/research-publications/publications/rail-passengers-really-feel>



Our research, *Train punctuality: the passenger perspective*⁵, 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.

Concerns with performance on Arriva Trains Wales 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 80 per cent of Arriva Trains Wales passengers overall are satisfied with punctuality and reliability, falling to 66 per cent of commuters.

Our 2014 research, *Rail passengers' priorities for improvements*⁶, found that having more trains arriving on time than happens now is the fifth highest improvement priority for commuters in Wales. This is followed by 'less frequent major unplanned disruptions to your journey' and preceded by 'train company keeps passengers informed about delays'. These factors come in at around one and a half times the importance of the average.

In our Arriva Trains Wales focus group research, passengers told us that they rarely experience major disruption across the network. When it does happen, they are understanding of and sympathetic to the reasons. Passengers recall Storm Doris as a time when there was major disruption, but note that they were warned about it beforehand and given advice about their journey.

The way disruption is handled is an important issue for passengers. 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.

If the operator is seen to handle the disruption situation well, they can go some way to mitigating the anger and frustration felt by passengers, but handling it badly erodes passengers' trust.

Handling disruption is not highlighted as a major cause for concern for Arriva Trains Wales passengers in our focus group research, but our other research suggests there is still plenty of room for improvement. How the train company dealt with delays is the number one driver of dissatisfaction for Arriva Trains Wales passengers, according to the NRPS. Satisfaction with this is low, at 42 per cent, although this is on a par with other regional sector operators. Satisfaction with 'usefulness of information during delays' stands at 50 per cent, slightly below the Regional sector average of 53 per cent. However, while on Cardiff and Valleys routes it is low at just 49 per cent, it is much higher on the Inter Urban route at 77 per cent.

⁵ *Train punctuality: the passenger perspective*, November 2015

⁶ *Rail passengers' priorities for improvements*, October 2014



Replacing trains and improving stations

In our research, Arriva Trains Wales passengers say that they find trains and many stations to be outdated and in need of investment. They find the standard of cleanliness and upkeep and repair to be below that experienced on other operators. There are places where passengers notice and appreciate small improvements, but they feel it is superficial, perceiving a lax attitude to keeping trains and stations clean and tidy. The issues are most acute for commuters, but are experienced by passengers right across the network.

Trains are seen as being old-fashioned, poorly maintained and dirty. While some of this is probably related to the actual age of the trains, it has helped fuel a perception of an operator that does not care. Passengers cite the state of toilets on board as a particular issue. In some places passengers have seen improvements, such as the introduction of plug sockets and Wi-Fi, but then they sometimes find that these don't work. In any case, the basic state of the train is more important.

Passengers' key concerns are that trains are cold (fieldwork was carried out in March), or at other times too hot, with dirty windows, unclean toilets and grubby seats. Those who also travel on other operators that connect with the Arriva Trains Wales network, such as London Midland, Great Western Railway and Virgin Trains, notice a difference in standards.

The NRPS shows that the cleanliness of the inside of the train is the top driver of overall satisfaction for Arriva Trains Wales passengers. This is noteworthy because for most operators punctuality and reliability is the biggest driver. Satisfaction is at 70 per cent, against a regional sector average of 74 per cent. Cardiff and Valleys passengers are less satisfied with cleanliness,

at 62 per cent. There is a difference between cleanliness of the inside and of the outside of the train. In general passengers rate the cleanliness of the outside (66 per cent) lower than the cleanliness inside (70 per cent). On some routes, this difference is starker. The Mid Wales and Borders services cover some particularly scenic routes and are more geared towards leisure travel, so being able to see out of the window is important. Satisfaction with the cleanliness inside the train is 81 per cent, but 68 per cent with cleanliness outside the train.

Satisfaction with the upkeep and repair of the train is 64 per cent, below the regional sector average of 70 per cent. This falls to just 54 per cent among Cardiff and Valleys passengers, well below the average for similar short commuter routes on other operators of 74 per cent. Satisfaction with toilet facilities on board is also low, at 47 per cent, but higher than the regional average of 43 per cent.

Stations are also in need of investment. Some urban stations, such as Chester, have been renovated relatively recently and passengers recognise the improvements, seeing them as 'up to date'. But other key urban stations on the Wales and Borders network are seen as neglected and in need of investment. Passengers feel that stations that should be 'flagships', such as Cardiff Central, often feel dated, lacking amenity and even a bit 'tatty'.

Smaller stations suffer from a lack of basic facilities such as shelter, lighting, toilets, cafes and ticket offices. Whilst passengers recognise that it isn't realistic to expect all of these everywhere, people should be able to sit somewhere, without being exposed to the elements, whilst waiting for their train. Many smaller stations feel neglected, with no staff at all or at certain times. They can feel intimidating places to wait or alight, especially at night. This is particularly the case for smaller



stations in urban areas. Passengers also raise concerns about getting to the station, with the perception of limited co-ordination between rail and other modes and little sense of an urban or regional plan. Some passengers also see station parking as expensive.

However, across the network our research highlights that there are many 'picturesque' stations that generate affection and are valued for their character. In rural areas they are seen as part of the local community fabric. Some have been part of community regeneration projects, and this is valued by local passengers. Passengers in Mid Wales praise Arriva Trains Wales for involving schools in decorating local stations.

Passengers also generally find basic information provision to be adequate. Stations have live departures boards, and people find these useful.

The NRPS backs up the research. Satisfaction with the upkeep and repair of the station buildings/platforms is at 66 per cent – significantly lower than the regional sector average of 78 per cent. It is relatively consistent across the network, but notably lower for South Wales and Borders and West Wales, at 59 per cent.

Satisfaction with the cleanliness of the station shows a similar picture, with 69 per cent for Arriva Trains Wales against a Regional sector average of 80 per cent. South Wales and Borders and West Wales again falls behind, at 61 per cent.

Satisfaction with personal security whilst using the station is also 69 per cent, against a sector average of 76 per cent. It's lowest for Cardiff and Valleys routes, at 62 per cent. We know that passengers want stations to be well-lit, and that they are reassured by the presence of staff. Where staff are not present, they value monitored CCTV and an ability use a phone or help point to contact a helpful, informed member of staff.

Tickets, retailing and value for money

We know from our *Rail passengers' priorities for improvement* research that value for money is the second highest priority for improvement for Arriva Trains Wales passengers, after the ability to get a seat. It's over four and a half times the average importance.

But based on our focus groups with Arriva Trains Wales passengers, fares are felt to be comparatively reasonable when compared to other options. This is especially true for local journeys, although less true for longer journeys or group travel.

However, passengers don't feel that the ticket prices offer value for money, given the quality of the service on offer. In order for them to feel like they are getting decent value, they expect to get a seat, they expect the train to be on time and they expect it to be clean. Their perception of value for money is hindered by the feeling

that stations and trains are old-fashioned and run down.

The NRPS shows that, at 61 per cent, overall satisfaction with value for money is similar to the average for regional sector operators at 60 per cent.

Passengers making longer journeys find the ticketing structure complicated, confusing and often expensive. Some recognise that there are bargains to be had, but many struggle to understand how to get the best deal. Large price differences between similar journeys often seem extreme and arbitrary, and it can be difficult for passengers to know if they have achieved the optimum price for their journey, or even what approach they should adopt to find that. This often results in confusion and mistrust of the railway.

Many passengers are unaware of deals offered by Arriva Train Wales, such as group tickets or Rovers. Season tickets are seen as reasonable value, but limited in that they only cover a single mode of transport going from A to B and do not include a reserved seat. Where more than one mode is available, passengers would like to be able to buy a season ticket to cover both bus and train. For those who know about them, people value various types of railcards, such as regional discount schemes like the Cambrian Railcard.

Buying a ticket can also be problematic. Many passengers are less confident in using ticket machines, due to the machines' unreliability or uncertainty about whether they're getting the best, or even buying the correct fare. A lack of ticket offices and ticket machines at suburban and rural stations makes buying a ticket a challenge, or impossible if facilities are absent altogether, and many have to rely on buying a ticket on board the train.

However, on many local services it can be difficult to buy tickets from conductors, who can't get through the train because of overcrowding, or sometimes just because of a perceived lack of effort by staff in making themselves visible. This can lead to added hassle and delays at the destination. At worst, passengers get into unjustified trouble for not having been able to buy a ticket, or for having mistakenly bought the wrong ticket.

Transport Focus receives complaints appeals cases where Arriva Trains Wales passengers have been penalised for having expected to be able to pay on the train, when in fact they were supposed to have bought a ticket beforehand.

Passengers should buy the right ticket for their journey, but they must have a clear and straight-forward means of purchase. Given there are sometimes insufficient retail facilities at stations, and the conductor is not always able to get through the train due to overcrowding or is unavailable while attending to operational duties, there needs to be a fairer and more consistent approach. The current operator has proved inflexible with many of Transport Focus's appeals team on this issue, applying a 'rules are rules' approach rather than using discretion to give people the benefit of the doubt, and offering goodwill gestures where people feel unfairly treated. This destroys trust with people affected.

Staffing and the passenger's relationship with the operator

Importantly, people value staff at stations (where present) and on trains. They find them friendly, helpful and approachable. At staffed rural stations, the ticket office is seen as an important part of the community. Some passengers choose to buy from their local ticket office, as opposed to online or over the phone, for that very reason. They also know and trust the local staff to help them get the best ticket. At such stations, the staff are often well known locally. Passengers we spoke to refer to them by name. Passengers would like to see the operator of the new franchise to have a very local focus and 'non-corporate' feel.

The NRPS shows that satisfaction with the helpfulness and attitude of staff on the train is high, at 84 per cent for Arriva Trains Wales overall, against a regional sector average of 79 per cent. It's even higher for the more rural routes; in the North Wales and Borders area it rises to 94 per cent. At stations, satisfaction with the attitudes and helpfulness of staff is 75 per cent against a regional average of 80 per cent.

Passengers would like to see more members of staff at stations and on trains. As well as being able to offer general information, assistance and customer service, this would aid the issues around buying a ticket, dealing with disruption and helping people feel safe and secure. In particular, for passengers with disabilities, lack of staff is the main barrier to travel. The NRPS shows that satisfaction with the availability of staff at stations is just 58 per cent against a



regional sector average of 70 per cent. It's particularly low for Cardiff and Valleys stations at 51 per cent. Satisfaction with the availability of staff on trains is 73 per cent overall, the higher score perhaps reflecting the fact that all Arriva Trains Wales services currently have a conductor on board. It's 64 per cent for the regional sector overall.

But there is a sense that, whilst local staff have a relationship with passengers, they represent their communities rather than the train company. Passengers see them as separate from Arriva Trains Wales, detached from the brand. In our focus groups research, passengers struggle to articulate what the Arriva brand represents. Notwithstanding the name 'Arriva Trains Wales' and the use of the Welsh language on signage and in announcements, it's not seen as particularly Welsh. Passengers feel the 'relationship' is simply that of consumer-supplier, but without many of the usual benefits of competition and choice seen in other markets.

Underinvestment, such as worn-out rolling stock and stations, is often perceived as a lack of care for passengers, particularly where they don't see any countervailing narrative from Arriva Trains Wales about improvements and progress. The train company is the 'face' of the rail industry and takes the 'blame' for investment issues despite the key role also played by Network Rail and governments. This leads many passengers to express cynicism about the company and its motives. They feel resigned to the current issues with the network, not really believing it can improve.

Previous research looking at passengers' relationship with the rail industry⁷ 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 Arriva Trains Wales stands at minus 16 per cent, against an industry average of minus 14 per cent⁸. Net trust in the relationship passengers have with Arriva Trains Wales is also low, at minus 14 per cent, compared to an industry average of minus six per cent. It is important that the new operation works to address this lack of faith in the ability to run an effective service, and to build a positive relationship with passengers.

⁷ *Passengers' relationship with the rail industry*, August 2014

⁸ Passengers 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.

Passengers' understanding of the network

Passengers would like to see TfW and the next operator of the Wales and Borders rail service to put forward a coherent plan to address the issues identified. They want a plan that is designed in conjunction with other transport modes. There is some awareness of the electrification programme in South Wales, and a little of the proposed South Wales Metro concept. Passengers in the Borders areas don't have significant problems with the new rail service contract being awarded by the Welsh Government as they understand the geography of the network. In general, though, passengers would like to know more about the role of the Welsh Government and TfW, and hope that passengers' needs are prioritised.

What next?

Our aim is to ensure that passenger interests are placed at the heart of the Wales and Borders rail service. 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 competition to appoint a new operator and development partner for the Wales and Borders rail service. This will include ongoing dialogue with TfW as they develop the requirements from the bidders. We have used it in our formal response to TfW's consultation and in discussions with bidders as they shape their proposals.

Our full response to the TfW consultation and the research agency report of the qualitative research with Arriva Trains Wales passengers are available on our website.



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