

Cynulliad Cenedlaethol Cymru	National Assembly for Wales
Y Pwyllgor Menter a Busnes	Enterprise and Business Committee
Ymchwiliad i'r Blaenoriaethau ar gyfer dyfodol Seilwaith y Rheilffyrdd yng Nghymru	Inquiry into the Priorities for the future of Welsh Rail Infrastructure
WRI 09	WRI 09
Ffocws ar drafnidiaeth	Transport Focus

Submission to Enterprise and Business Committee inquiry: Priorities for the Future of Welsh Rail Infrastructure

1. Introduction

- 1.1 Transport Focus is the statutory watchdog for rail passengers in Great Britain; bus, tram and coach passengers in England (outside London) and for users of the Strategic Road Network in England. As the statutory body representing the interests of rail passengers in Wales, we work with the industry, user groups and government to secure journey improvements based on passengers' priorities.
- 1.2 We welcome the opportunity to provide input to the inquiry into the priorities for the future of rail infrastructure in Wales. Our starting point is to focus on outputs for passengers: the more that policies reflect passengers' priorities the closer they will be to delivering the type of railway that passengers want. In an era of cost consciousness and efficiency it will be essential that scarce resources are focussed on the things that deliver the biggest passenger 'dividend' across the whole route. Our research is relevant to the development of transport policies at high level, potential franchise decisions that may be taken in the next five years as well as future control periods. Transport Focus has published a wealth of data. Our key research reports are listed in Appendix A.

2. Passenger priorities for improvement

- 2.1 A study of passengers' priorities¹ shows that the top three requirements of passengers in Wales directly reflect those of the Great Britain sample overall.

Rail passengers' priorities for improvement (top 15 by index score)

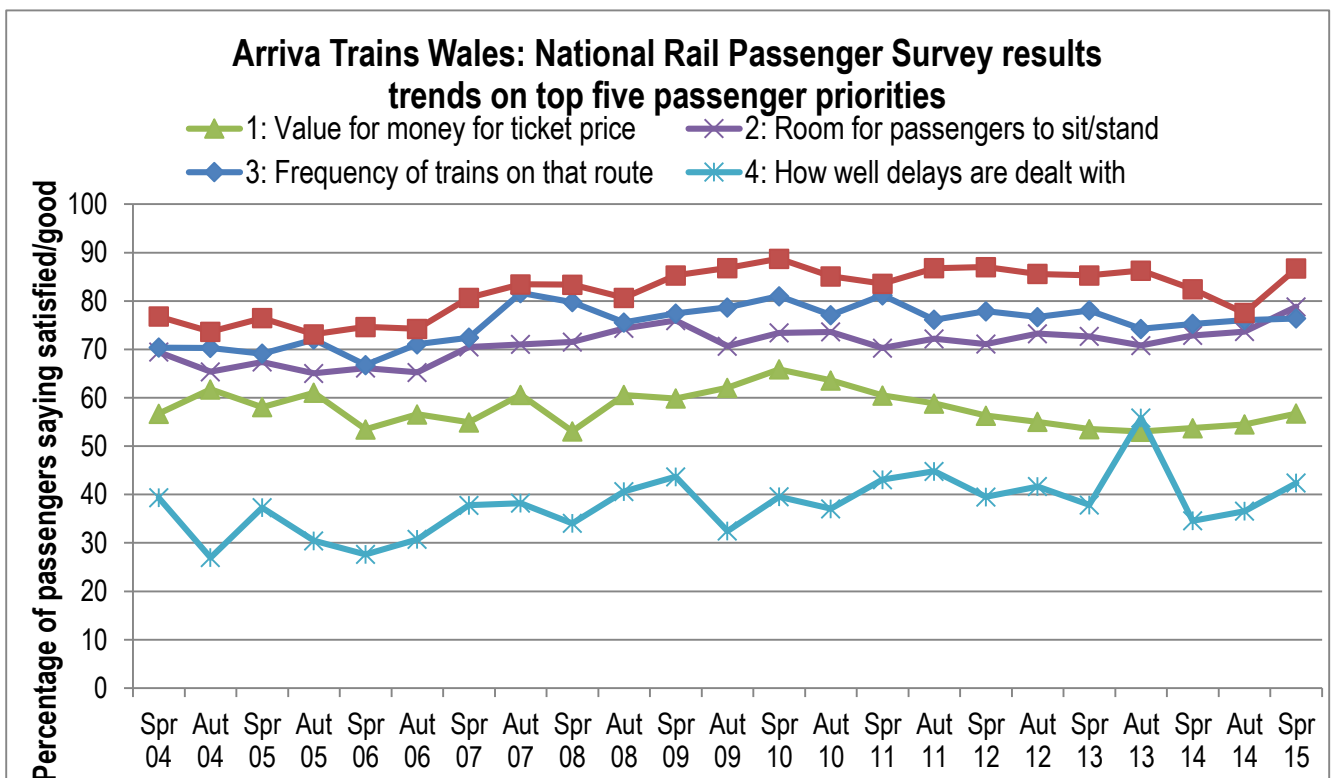
Comparison of Wales and Great Britain Factor	Wales		Great Britain	
	Rank	Index	Rank	Index
Price of train tickets offers better value for money	1	458	1	494
Passengers always able to get a seat on the train	2	402	2	367
Trains sufficiently frequent at the times I wish to travel	3	238	3	264
Train company keeps passengers informed about delays	4	168	5	163
More trains arrive on time than happens now	5	150	4	178
Accurate and timely information available at stations	6	140	8	132
Less frequent major unplanned disruptions to your journey	7	133	6	161
Fewer trains cancelled than happens now	8	116	7	136
Well-maintained, clean toilet facilities on every train	9	106	14	89
Inside of train is maintained and cleaned to a high standard	10	106	11	93
Free Wi-Fi available on the train	11	97	10	97
Accurate and timely information provided on trains	12	97	12	92
Connections with other train services are always good	13	95	15	84
Journey time is reduced	14	84	9	105
Less disruption due to engineering works	15	76	13	90

¹ <http://www.transportfocus.org.uk/research/publications/rail-passengers-priorities-for-improvements-october-2014>

- 2.2 The priorities in the table above are shown as an index 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 average. So we can see that, for passengers in Wales, the top priority of ‘the price of train tickets offers better value for money’ at 458 is therefore over four and a half times more important than average, with ‘passengers always able to get a seat on the train’ at four times more important than average.
- 2.3 This research provides a very clear picture of passengers’ priorities for improvement. The two top priorities, by some considerable margin, are ‘price of train tickets offers better value for money’ and ‘passengers always able to get a seat on the train’. The strong third priority for improvement, indexed at 238, is ‘trains sufficiently frequent at the times I wish to travel’.
- 2.4 The next group of important priority factors also feature what can be regarded as core elements of service. Passengers want good information about their services, improvements in punctuality, reliability and journey time, fewer disruptions, well-maintained toilets and trains and good connections. All top ten priorities in Wales rank above the average 100 index.

3. Passenger experience

- 3.1 Transport Focus has conducted the National Rail Passenger Survey (NRPS) across England, Scotland and Wales since 1999. We consult over 50,000 passengers across two phases of research each year to produce a network-wide picture of passengers’ satisfaction with rail travel. The data set is publicly available and able to be scrutinised on our website².



² <http://data.transportfocus.org.uk/train/nps/question/service-overall/>

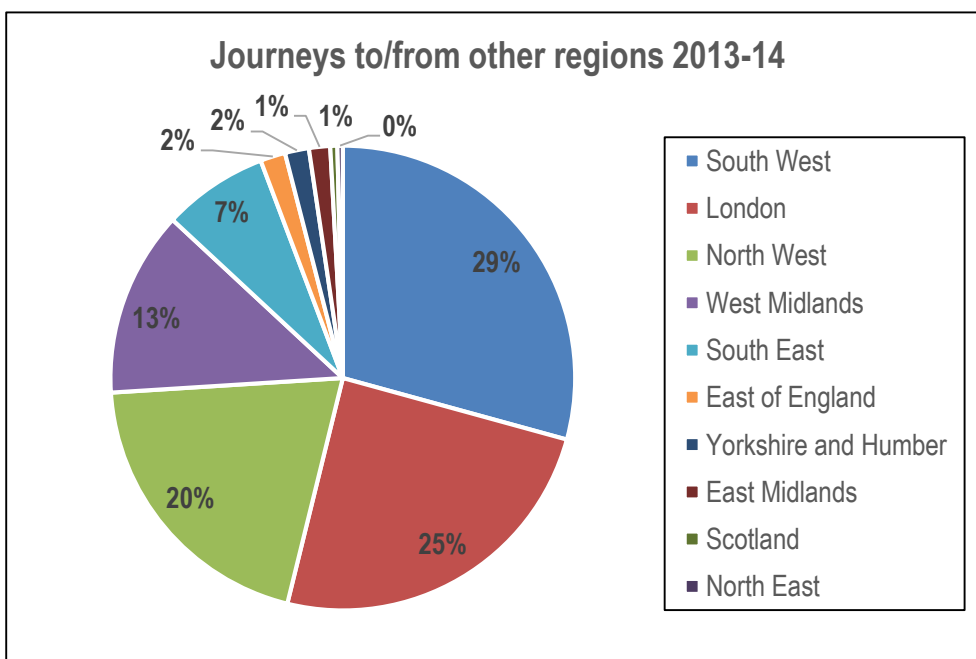
- 3.2 Analysis of NRPS factors for Arriva Trains Wales which correlate most highly with overall journey satisfaction show that train cleanliness is the biggest driver of satisfaction, followed by punctuality, seating comfort and journey length. Managing delays and personal security on-board are the biggest drivers of dissatisfaction. The chart above shows the trends from NRPS data for passengers' satisfaction with these priority factors, since the beginning of the current Wales and Borders franchise.
- 3.3 Based on our NRPS and priorities for improvement research we can readily identify the core factors that matter to passengers. These should be kept firmly in mind as developments take place for future policies. Passengers therefore want a dependable and resilient network that will deliver:
- a punctual and reliable service, with value for money for the price of tickets
 - provision of sufficient capacity, in terms of frequency of service and sufficient seating on the train, network capacity and flexibility through effective design and electrification
 - effective management of any disruption, especially through information to passengers
 - well-maintained trains and toilets
 - accurate information about trains and platforms
 - good connections, with shorter journey times.

4. Factors for transport integration in Wales

- 4.1 Good transport integration should be built on recognising the issues passengers face and improving their experience to create a positive and attractive service.

Cross-border journeys

- 4.2 The latest figures from the Office of Rail and Road (ORR) highlight the importance of cross-border journeys to Welsh rail users. In 2013-14 nearly 29 million annual rail journeys started and/or finished in Wales. Just under one-third of these crossed the Wales-England border – just over nine million journeys. The chart below shows the majority cross the border to or from the South West and London, with a significant proportion then going to or from the North West and West Midlands; making these important areas of focus for the Welsh railway.



Connectivity and network integration

4.3 Comparison of satisfaction with transport connections both within Wales and for Wales-England shows that whilst connections between train services are broadly similar, when looking at connections with other forms of public transport, this difference for journeys within Wales is significant. As shown in the table below, in the spring 2015 wave despite improvements, satisfaction for journeys within Wales was only 68% compared with 78% for Wales-England journeys.

National Rail Passenger Survey - Transport Connections

Attribute % saying satisfied/good	Autumn '10	Spring '11	Autumn '11	Spring '12	Autumn '12	Spring '13	Autumn '13	Spring '14	Autumn '14	Spring '15
Within Wales Journeys										
Connections with other forms of public transport	61	58	54	64	67	61	63	58	61	68
Connections with other train services	82	82	76	79	81	85	87	73	78	77
Wales-England Journeys										
Connections with other forms of public transport	75	72	76	73	72	76	78	72	70	78
Connections with other train services	78	73	81	78	81	78	73	74	73	75

4.4 Passengers value the concept of a network and a seamless delivery of service. They want interaction and connectivity, with good standards of information to ‘hold their hand’ and give them confidence in the ability to make joined-up journeys.

4.5 Transport Focus conducted joint research with the Association of Train Operating Companies (ATOC) into the perception and reality of integrated transport³. This study aimed to gain a better understanding of the role played by integrated transport in attracting new or infrequent passengers to rail; the problems making end-to-end journeys and priorities for improvement. The main barriers we found were:

- the perceived cost of the ticket
- the perceived hassle of going by train
- an assumption that the door-to-door journey (except long-distance) would be longer
- concerns about punctuality and reliability; particularly when changing trains.

4.6 The South East Wales Metro proposes linking a core network with feeder services across a multi-modal network. This will need to demonstrate good transport integration, built on recognising the issues passengers face and improving their experience to create a positive and attractive service, that can be rolled out across Wales. To influence the decisions made by passengers on whether to use public transport, it will need to provide integrated, reliable and frequent services, allowing easy movement across regions and borders, supported by readily-accessible information and simple ticketing, travelling comfort, security and assurance that all stages of the journey will link up⁴.

³ <http://www.transportfocus.org.uk/research/publications/integrated-transport-perception-and-reality>

⁴ Door to door by public transport – improving integration between National Rail and other public transport services in Britain, June 2009

- 4.7 Our smart tickets research⁵ shows that rail passengers essentially want something that makes it easier to travel, with more flexibility, but also cheaper, offering a discount, with further products as technology develops and delivered in an easy format. It is also essential that smart ticketing schemes are well designed, properly implemented and clearly communicated.

5. Developing future rail services

- 5.1 Based on the priorities for improvement research and NRPS we can readily identify the core factors that matter to passengers and how well these are meeting the needs and expectations of passengers in Wales. These should be kept firmly in mind as future proposals are developed.

Transparency

- 5.2 We wish to see far greater transparency of information that is relevant to passenger experience. Giving rail passengers access to performance figures relevant to their services will help them to hold the train company to account and to ask what is being done to improve services in return for the fares they pay. Good management should not feel threatened by this. Indeed the availability of accurate data may actually help them – a particularly bad journey can linger in the memory and distort passengers’ perceptions. Accurate, relevant data can help challenge these negative perceptions and focus management attention on areas that need improving. Hence, at the very least, we believe there is a case for providing performance data at a disaggregated route level.
- 5.3 More generally, we recommend adoption of an increasingly open approach to making data and information about all aspects of rail service provision available in the public domain.

High Level Output Specification (HLOS) – process and engagement

- 5.4 The Bowe report⁶ emphasised the importance of engaging users. While acknowledging that there is engagement in the HLOS process and the Route studies the report recommended much more engagement into how the planning of enhancements should be delivered. She said, and we quote, “The failure to engage effectively with users in this planning of delivery has had two impacts. First, it can be seen as contributing to cost escalation, via inefficient planning of possessions and the associated performance payments required to operators through their track access agreements with Network Rail. And second, it may contribute to passenger dissatisfaction on the occasions when things do go wrong.”
- 5.5 We agree with this analysis. We think there is value in projects containing specific plans covering:
- Consultation on delivery. At its most basic it would involve giving passengers information about the scheme: when it is coming up, a clear statement setting out what is being purchased for them, with an opportunity to feed in their views and a role for passengers in monitoring delivery.

⁵ <http://www.transportfocus.org.uk/research/publications/smart-ticketing-what-rail-passengers-want-july-2013>

⁶ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/479560/bowe-review.pdf

- Disruption. The extent of disruption to services, the consideration of alternatives and how passengers will be informed. This would not be complete from day one as it clearly needs the ongoing involvement of the TOC(s) involved but it can at least set out the working assumptions and then be updated as the project evolves. The reference point for this is our recent research on disruption at Reading and Bath Spa in 2015⁷, which showed that higher awareness of disruption leads to greater acceptance of the alternatives.

Performance

- 5.6 We recommend that operational focus on ‘right-time’ arrival at all stops is made a core requirement of the rail network, together with a requirement for publication of detailed performance information which will inevitably act as a catalyst to improvement:
- Challenging but achievable PPM targets for the network as a whole and key service groups
 - Disaggregated punctuality, with passengers able to identify performance of individual trains
 - Moves towards a ‘right-time’ railway, with a requirement to report performance of trains arriving at key intermediate stations.

Dealing with disruption and provision of information

- 5.7 ‘How the train company deals with delays’ is, by far and away, the biggest driver of passenger dissatisfaction. Transport Focus has been working with ATW to review performance, with very positive outcomes. We recommend a partnership approach to building on this by incorporating key objectives:
- Targets to improve NRPS satisfaction with the provision of information during the journey and a strategy developed and implemented to improve NRPS scores for ‘how well the train company dealt with delay’ and ‘usefulness of information during a delay.’
 - Robust information provision, feeding into a facility for passenger emails or text alerts, warning of likely disruption, with an associated requirement to achieve a strong level of uptake
 - Full adoption of the Association of Train Operating Companies’ (ATOC) *Approved Code of Practice: passenger information during disruption* and compliance with the Good Practice Guides on provision of passenger information, together with a programme of audit and mystery shopping to assess delivery on the ground.
- 5.8 Further recommendations were published along with our latest findings in September 2014 in our report: *Passenger information when trains are disrupted*⁸.

Devolution

- 5.9 Passengers are focused on the outputs that matter to them – how punctual their service is, how many seats are available and whether they are kept informed when there are delays – rather than the structures adopted by the industry and Government to deliver these. The fact that C2C (short-term franchise), Chiltern (longer-term franchise) and London Overground (a concession) all record high levels of passenger satisfaction suggests that that structure / ownership cannot be the sole factor determining success.

⁷ <http://www.transportfocus.org.uk/research/publications/planned-rail-engineering-work-passenger-perspective>

⁸ <http://www.transportfocus.org.uk/research/publications/passenger-information-when-trains-are-disrupted>

5.10 There appear to us to be two key features that need to be taken into account when assessing the different models available:

- Investment

Investment is one of the common features in the examples given above. Money spent to make the infrastructure more reliable and on rolling stock to transform the travelling experience is reflected in higher passenger satisfaction. Put simply, there is a passenger dividend from investment.

Hence one of the considerations when reviewing decentralisation proposals must be the ability of relevant parties to raise funds for investment – not just in terms of a one-off injection but sustained investment over time. History has shown that running/specifying a railway requires deep-pockets and the financial stability to withstand fluctuations in economic conditions.

- Management

Investment must also be backed up with good management. From our perspective this means management that puts the passenger at the heart of the process and which has the skills, abilities and experience to deliver improvements. This may include procurement and contract management experience, engineering, railway planning, as well as the technical knowledge required to engage with train companies and Network Rail.

6. Conclusions

6.1 Our research demonstrates the critical importance of capacity and performance to passengers in Wales. This is clear both for current and future needs. This therefore suggests that improvements in infrastructure to enable greater capacity, frequency and performance should be the cornerstone of any approach. The particular importance attached to improving handling of disruption and provision of passenger information in Wales is also worthy of note.

6.2 Furthermore, given the importance of punctuality as a main driver of overall passenger satisfaction we believe greater adherence to a 'right-time' railway could help drive up levels of overall satisfaction in the future. We are not advocating the complete removal of PPM as the official measure but rather that greater use is made of right-time performance. Using the route study to establish a longer-term trajectory to improve right-time punctuality would help the industry focus efforts in areas that have a direct influence on passenger satisfaction.

6.3 Finally, given the scale of the exercise and timescales it is important that planning assumptions are regularly 'sense checked' to ensure plans continue to reflect passengers' requirements from the network. In the same vein given significant levels of increased demand across the area, it is also important that demand estimates are robust and process is responsive enough to accommodate changes or inaccuracies in planning assumptions.

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Appendix A – Passenger research

National rail passenger survey – spring 2015

<http://www.transportfocus.org.uk/research/national-passenger-survey-introduction>

Rail passengers' priorities for improvement – October 2014

<http://www.transportfocus.org.uk/research/publications/rail-passengers-priorities-for-improvements-october-2014>

Planned rail engineering work - the passenger perspective – December 2015

<http://www.transportfocus.org.uk/research/publications/planned-rail-engineering-work-passenger-perspective>

Train punctuality: the passenger perspective – November 2015

<http://www.transportfocus.org.uk/research/publications/train-punctuality-the-passenger-perspective>

Passengers' relationship with the rail industry – August 2014

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

Ticket to ride? – May 2012

<http://www.transportfocus.org.uk/research/publications/ticket-to-ride-full-report-may-2012>

Ticket to ride update – February 2015

<http://www.transportfocus.org.uk/research/publications/ticket-to-ride-an-update>

Smart ticketing – what rail passengers want - July 2013

<http://www.transportfocus.org.uk/research/publications/smart-ticketing-what-rail-passengers-want-july-2013>

Smart ticketing – mobile applications – November 2013

<http://www.transportfocus.org.uk/research/publications/smart-ticketing-mobile-applications>

Smart ticketing - contactless payment for rail – December 2014

<http://www.transportfocus.org.uk/research/publications/smart-ticketing-contactless-payment-for-rail>

Delays and disruption: rail passengers have their say – November 2010

<http://www.transportfocus.org.uk/research/publications/delays-and-disruption-rail-passengers-have-their-say>

Passenger information when trains are disrupted – September 2014

<http://www.transportfocus.org.uk/research/publications/passenger-information-when-trains-are-disrupted>

Integrated Transport - perception and reality – January 2010

<http://www.transportfocus.org.uk/research/publications/integrated-transport-perception-and-reality>

Giving passengers a voice in rail services – June 2013

<http://www.transportfocus.org.uk/research/publications/giving-passengers-a-voice-in-rail-services>