

## Submission to National Assembly for Wales Enterprise and Business Committee Inquiry into Integrated Public Transport

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### 1. Introduction

- 1.1 Passenger Focus is the statutory watchdog for rail passengers in Great Britain; and for bus, tram and coach passengers in England (outside London). As we have no remit for bus passenger representation within Wales, our submission only focuses on rail.
- 1.2 This submission approaches transport integration from the perspective of rail travel provision.

### 2. National Transport Policy

- 2.1 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'.
- 2.2 The closer that national strategy is aligned with passenger priorities the better the potential service for passengers.

### 3. Rail passengers' priorities and drivers of satisfaction

- 3.1 As part of its input into the High Level Output Specification (HLOS) process Passenger Focus commissioned research into passenger priorities for improvement. Around 4000 passengers were asked to rank 30 different aspects of rail travel<sup>1</sup>. The work was repeated in 2009<sup>2</sup>.
- 3.2 The table below shows the scores for Wales in 2009 and, for comparative purposes, the rankings for Great Britain as a whole.
- 3.3 In the 2009 research there were three clear priorities for improvement: value for money, frequency and punctuality. These, coupled with seats/capacity in fourth place, emphasise the importance passengers place on the 'core product'.

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<sup>1</sup> Passengers' priorities for improvements in rail services. July 2007

<sup>2</sup> Passengers' priorities for improvements in rail services. March 2010

3.4 It is also noticeable that personal security on the train and connections with other forms of transport are of higher importance in Wales.

| Wales Rank 2009 | Great Britain Rank | Attribute   |
|-----------------|--------------------|---|
| 1               | 1                  | Price of ticket offers excellent value for money            |
| 2               | 3                  | Sufficient train services at times I use the train          |
| 3               | 2                  | At least 19 out of 20 trains on time                        |
| 4               | 4                  | Passengers are always able to get a seat                    |
| 5               | 5                  | Company keeps passengers informed if train delays           |
| 6               | 12                 | Passengers experience a high level of security on the train |
| 7               | 18                 | Connections with other train services are always good       |
| 8               | 8                  | Trains consistently well maintained / excellent condition   |
| 9               | 6                  | Information on train times/platforms accurate and available |
| 10              | 13                 | Inside of the train cleaned to a high standard              |
| 11              | 9                  | Seating area of the train is very comfortable               |
| 12              | 14                 | Personal security improved through CCTV / staff at stations |
| 13              | 16                 | All trains have staff available to help passengers          |
| 14              | 15                 | Good easy connections with other forms of transport         |
| 15              | 17                 | All train staff helpful/have a positive attitude            |

i) Personal security

Perception of personal security whilst using stations is of concern to passengers in particular when using unstaffed stations. Passengers see the presence of staff as important to personal security when using the train – see *Cost and Efficiency, 9.4*.

ii) Connections with other services

National Passenger Survey results show that satisfaction for connections with other train services within Wales is slightly lower than for cross-border journeys – see *Transport connections, 4.2*.

## 4. Transport connections

4.1 Passenger Focus conducts the National Passenger Survey (NPS). We consult over 50,000 passengers a year to produce a network-wide picture of passengers' satisfaction with rail travel.

4.2 Comparison of satisfaction with transport connections shows lower levels for journeys within Wales than for Wales-England. Whilst connections between train services are only slightly lower within Wales, when looking at connections with other forms of public transport, this difference is significant. In the spring 2012 wave despite improvements, satisfaction for journeys within Wales was only 64% compared with 73% for Wales-England journeys.

**Transport connections**

|  | %satisfied/good |            |            |            |            |            |            |
|--|-----------------|------------|------------|------------|------------|------------|------------|
|  | Spring '09      | Autumn '09 | Spring '10 | Autumn '10 | Spring '11 | Autumn '11 | Spring '12 |
| <b>Within Wales Journeys</b>                     |                 |            |            |            |            |            |            |
| Connections with other forms of public transport | 60              | 60         | 58         | 61         | 58         | 54         | 64         |
| Connections with other train services            | 79              | 76         | 77         | 82         | 82         | 76         | 79         |
| <b>Wales-England Journeys</b>                    |                 |            |            |            |            |            |            |
| Connections with other forms of public transport | 76              | 75         | 76         | 75         | 72         | 76         | 73         |
| Connections with other train services            | 80              | 76         | 77         | 78         | 73         | 81         | 78         |

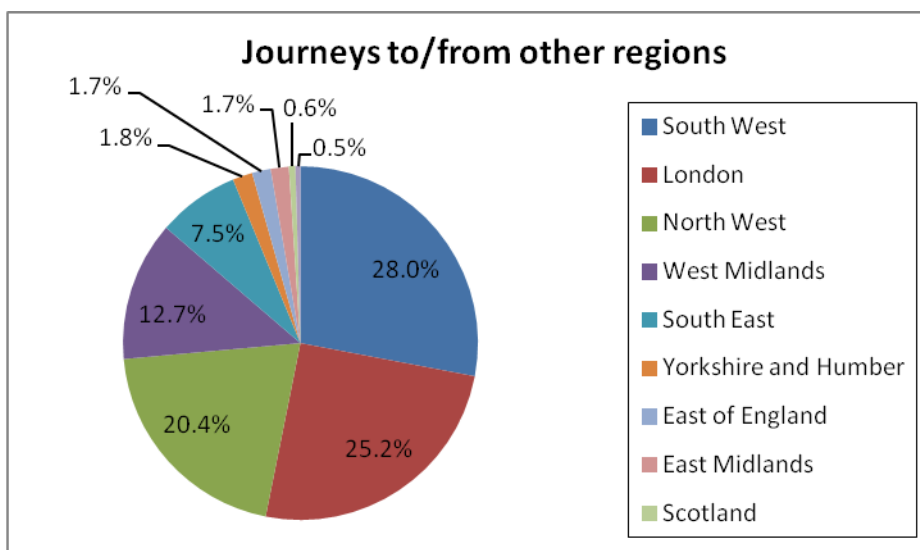
Source: National Passenger Survey

4.3 Good connections are important to maintain, as they are a key consideration when deciding whether to drive or use public transport.

**5. The importance of cross-border rail travel to Wales**

5.1 The latest figures from the Office of Rail Regulation (ORR) highlight the importance of cross-border journeys to Welsh rail users with just under one-third (31.5%) of the 27 million annual journeys that start and/or finish in Wales crossing the Wales-England border.

5.2 Of this one-third (8.59m journeys), the majority are going to/coming from the South West and London



Source: National Rail Trends 2010-11  
Office of Rail Regulation

5.3 Analysis by district/unitary authority shows that the majority of journeys into England start or finish in the Cardiff/Swansea/Newport corridor.

| <b>Wales- Passenger journeys to/from other regions</b>     |                |                |
|--|----------------|----------------|
| Journeys (thousands) 2010-11 by District/Unitary Authority |                |                |
| <b>To/From</b>   | <b>2010-11</b> | <b>2010-11</b> |
| CARDIFF - CAERDYDD   | 2,965          | 34.5%          |
| NEWPORT - CASNEWYDD  | 900            | 10.5%          |
| SWANSEA - ABERTAWE   | 554            | 6.5%           |
| WREXHAM - WRECSAM  | 475            | 5.5%           |
| GWYNEDD - GWYNEDD  | 452            | 5.3%           |
| CONWY – CONWY  | 437            | 5.1%           |
| DENBIGHSHIRE - SIR DDINBYCH                                | 419            | 4.9%           |
| MONMOUTHSHIRE - SIR FYNWY                                  | 373            | 4.3%           |
| FLINTSHIRE - SIR Y FFLINT                                  | 355            | 4.1%           |
| POWYS – POWYS  | 257            | 3.0%           |
| BRIDGEND - PEN-Y-BONT AR OGWR                              | 205            | 2.4%           |
| CEREDIGION - SIR CEREDIGION                                | 202            | 2.4%           |
| NEATH PORT TALBOT - CASTELL-NEDD PORT TALBOT               | 191            | 2.2%           |
| ISLE OF ANGLESEY - SIR YNYS MON                            | 183            | 2.1%           |
| CARMARTHENSHIRE - SIR GAERFYRDDIN                          | 164            | 1.9%           |
| PEMBROKESHIRE - SIR BENFRO                                 | 122            | 1.4%           |
| THE VALE OF GLAMORGAN - BRO MORGANNWG                      | 107            | 1.2%           |
| RHONDDA CYNON TAFF - RHONDDA CYNON TAF                     | 94             | 1.1%           |
| TORFAEN - TOR-FAEN   | 61             | 0.7%           |
| CAERPHILLY - CAERFFILI                                     | 48             | 0.6%           |
| MERTHYR TYDFIL - MERTHYR TUDFUL                            | 18             | 0.2%           |
| BLAENAU GWENT  | 6              | 0.1%           |
| <b>Wales Total</b>   | <b>8,590</b>   | <b>100%</b>    |

Source: National Rail Trends. 2010-11. Office of Rail Regulation

5.4 These figures highlight the fact that for Welsh rail passengers, important parts of the network are located outside of Wales. Travel to these destinations is often on services provided by English-based train operating companies (TOCs), especially (based on the evidence above) of First Great Western.

## 6. Improving cross-border services

6.1 As much of cross-border rail travel between Wales and England involves relatively long journeys, such as to London, many of the issues needed to improve the experience of Welsh passengers using these services are shared by users of Long Distance services more generally. From a Welsh, cross-border perspective, the most important of these issues include:

## 6.2 Fares

6.2.1 Passenger Focus' research<sup>3</sup> shows that passengers rate value for money as their top priority for improvement on the railway, and our National Passenger Survey shows that only 58% of cross-border passengers are satisfied that they get value for their money.

6.2.2 Our submission<sup>4</sup> on the recent consultation for the next Great Western franchise identified a number of recommendations:

- *Introduce an element of flexibility in Advance Fares*  
Allow Advance tickets to be 'upgraded' if a booked train is missed. Passengers should be able to pay the difference between what they have already paid and the price of the ticket valid at the time, subject to a reasonable administration fee. This would address the sense of grievance that many passengers feel when they are confronted with paying the full cost of the most expensive walk-up fare when they miss their train. Such flexibility could indeed be offered as a premium to the basic ticket
- *Improve access to Advance Fares*  
Ideally, passengers should be able to purchase Advance tickets at any time before a service departs. However, we recognise that this is not achievable with the rail industry's current systems. So in the interim we would like to see the cut-off time for the purchase of Advance tickets moved from 1800 to no earlier than 2359 on the eve of travel. This would at least allow people to get home from work and plan their affairs for the following day without automatically paying higher prices. Efforts must also be made to increase Ticket on Departure (TOD) schemes and e-ticketing as there are parts of the country where access to Advance tickets is dependent on delivery by post or involves a lengthy round trip to a station with reservation facilities.
- *Give passengers the information on which to make an informed purchase*  
Ticket restrictions and validities must be supplied at the point of purchase. Passenger Focus's recent research on ticket-vending machines showed that some passengers struggle to buy a ticket from a machine as they were not provided with sufficiently precise or enough information to ensure they got the correct ticket at the right price. This potentially results in passengers buying the more expensive ticket, utilising a 'better safe than sorry' mentality, or taking a chance on the cheaper ticket and risking a penalty or excess fare.

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<sup>3</sup> Passenger priorities for improvements in rail services. Passenger Focus.

<sup>4</sup> The Great Western Franchise: A consultation response from Passenger Focus. April 2012

We believe that validities should also be printed on the ticket itself (or at least be supplied with the ticket) to provide continuing reassurance to passengers.

### 6.3 Car parking

6.3.1 As Long Distance rail travel is from main-line stations and often involves an early departure and/or a late return, good car parking facilities are even more important than for local journeys.

6.3.2 Passenger Focus research<sup>5</sup> has found that passengers travelling to a railway station from rural, semi-rural and edge of town locations will generally drive and park at the station. If they struggle to find a car parking space at their station they may turn their backs on the railway and drive exclusively. The NPS results show that satisfaction with car parking facilities for cross-border travel is on a par with the sector average but, at only 63%, still leaves plenty of room for improvement.

## 7. Drivers of satisfaction

7.1 With more extensive study of NPS data, multivariate analysis reveals that cleanliness of the inside of the train and punctuality are the biggest drivers of overall satisfaction while the biggest driver of dissatisfaction is the way that the industry manages delays. In very simplistic terms, this means that the best way to improve overall passenger satisfaction is to get the trains to run on time and to keep them clean.

| Drivers of satisfaction                                  | Arriva Trains Wales |
|--|---------------------|
| <b>Station Factors</b>                                   |                     |
| Provision of information about train times/platforms     | 2%                  |
| Overall station environment                              | 3%                  |
| How request to station staff was handled                 | 1%                  |
| <b>Train Factors</b>                                     |                     |
| Frequency of the trains on that route                    | 3%                  |
| Punctuality/reliability                                  | 24%                 |
| Length of time the journey was scheduled to take (speed) | 14%                 |
| Value for money for the price of your ticket             | 1%                  |
| Provision of information during the journey              | 2%                  |
| Sufficient room for all the passengers to sit/stand      | 4%                  |
| Comfort of the seating area                              | 10%                 |
| Availability of the staff on the train                   | 3%                  |
| Cleanliness of the inside of the train                   | 34%                 |

<sup>5</sup> Getting to the station. March 2007

| Drivers of Dissatisfaction                               | Arriva Trains Wales |
|--|---------------------|
| <b>Station Factors</b>                                   |                     |
| Ticket buying facilities                                 | 1%                  |
| Provision of information about train times/platforms     | 2%                  |
| Facilities and services at the station                   | 1%                  |
| Attitudes and helpfulness of the staff                   | 2%                  |
| Facilities for car parking                               | 2%                  |
| <b>Train Factors</b>                                     |                     |
| Punctuality/reliability                                  | 25%                 |
| Length of time the journey was scheduled to take (speed) | 12%                 |
| Connections with other train services                    | 3%                  |
| Up keep and repair of the train                          | 1%                  |
| Helpfulness and attitude of staff on train               | 1%                  |
| Sufficient room for all the passengers to sit/stand      | 1%                  |
| Comfort of the seating area                              | 2%                  |
| Personal security whilst on board the train              | 1%                  |
| Availability of the staff on the train                   | 8%                  |
| How train company dealt with these delays                | 38%                 |

## 8. Transparency

8.1 We also think there is value in promoting greater transparency of rail data. This can be a very cost effective way of providing additional scrutiny. Transparency generates greater accountability. Giving rail passengers access to performance figures 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.

8.2 However, punctuality data is currently only provided at an overall TOC level which can easily mask significant differences between routes within the same TOC. Providing performance data at a route/service group level would help prevent this and focus attention on areas that need improving. It is important to stress that this information already exists – it would not involve any new costs in terms of data gathering. Equally, there is currently next to nothing in the public domain about crowding. This is another fundamental aspect of a passenger’s journey and an area where greater transparency can again generate improvements for passengers.



## 9. Cost and efficiency

9.1 Sir Roy McNulty's report on value for money in the rail sector (May 2011) contained a number of far-reaching conclusions for the rail industry and for passengers. Central to the report was a need to achieve a 30% reduction in unit cost by 2018-19 – representing a saving of around £1billion.

9.2 Passenger Focus believes it is essential that the 'post-McNulty' debate does not get lost in a narrow assessment of cost. Efficiency and cost are important - they clearly have a direct impact on the range of service offered to passengers and the fares charged - but cost savings must also be set alongside the value of rail to the economy and the country as a whole. Rail enables people to get to work, acts as a catalyst of economic activity, and, just as importantly, is an environmentally friendly mode of travel. Demand for rail has soared in the last 15 years – with passenger numbers now being at levels last seen during the 1920s. If this growth is to be sustained then it will be essential that the benefits of rail are taken into account in any debate as well as the cost of provision.

9.3 The report identified cutting staff costs (which are approaching £4bn a year) as a major priority. Amongst other things it recommended a move towards Driver Only Operation (DOO) and removing regulation on ticket office opening hours – presumably as a precursor to reducing retail staff.

9.4 Passenger Focus's research continually emphasises the importance of staff, particularly when it comes to issues of personal security, ticketing and the provision of information.

i) Personal security

- Most passengers who have expressed concern about station security attribute this to having witnessed anti-social behaviour by other people at the station and a lack of station staff. It is the same story for concerns about security on-board trains.
- Passengers consistently identify the presence of staff as important to providing reassurance to those travelling on the railway. Passenger Focus research carried out in 2011<sup>6</sup> found that satisfaction with security at unstaffed stations was 9% lower than the average for staffed stations in Wales. Better lighting and CCTV were seen as key and passengers also placed a high value on being able to access real-time information via Customer Information

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<sup>6</sup> The passenger experience at unstaffed stations, February 2011



Screens, particularly at times of disruption when passengers experience delays and cancellations.

- In terms of improving on-train security 75% of passengers believe that staff walking through the train would be effective.

ii) Buying a ticket

Passenger Focus research in 2008 found that many passengers queuing at ticket office window could have bought their ticket from a ticket vending machine (TVM). The decision not to was driven by:

- the purchaser's lack of confidence in using the machine
- the purchaser's lack of confidence in their ability to select the right ticket at the right price
- age: older passengers were less inclined to use ticket machines
- a preference for face-to-face transactions for reassurance

Further research in 2010 confirmed some of these fears. Even some passengers who were used to buying tickets through a TVM experienced difficulty when asked to find the correct ticket for an unfamiliar journey. The main cause of this confusion was linked to questions over the validity of ticket types and the restrictions that apply. Unlike buying tickets from staff or online, TVMs were often unable to provide the precise information or reassurance needed by the passenger. This potentially results in passengers buying the more expensive ticket, utilising a 'better safe than sorry' mentality, or taking a chance on the cheaper ticket and 'hoping for the best'.

The ticket clerk will ask some basic questions (about destination, day and time of travel and, where appropriate, about the choice of route/operator) and then offer the passenger a narrowed down range of options. In essence the ticket clerk navigates the passenger through the decision-making process. With TVMs on the other hand, passengers are left to work things out on their own.

iii) Passenger information

Staff presence at stations and on trains is considered an extremely important medium for delivering information – especially at times of unplanned disruption. Passengers express a strong desire for staff to be available on station platforms so that they can provide confirmation of the information displayed on screens, before committing to board a train. Staff are often

assumed to be aware of the latest available information, and may be sought out by passengers who want updates or reassurance on whether trains are running to schedule.

There is a very real danger that staff are seen only as a cost without considering the value they are adding. There may be scope for efficiency savings - more multi-functional staff for instance – but the debate must not simply be about cost. A visible staff presence brings real benefits to passengers which any review must also take into account.

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