



# What do passengers want?

20 November 2007

Anthony Smith

**Chief Executive**



# National Passenger Survey background

- Set up in Autumn 1999 to provide a network wide picture of passenger satisfaction with rail travel
- It assesses service aspects that are important to passengers
- Passengers asked for views of a 'real' journey
- It enables us to monitor trends in passenger satisfaction over time and across TOCs
- NPS provides information about passenger perceptions of rail for range of uses

# What passengers tell us...

**Nationally – 79% of passengers are satisfied with their journey overall**

## **Areas of High Satisfaction**

82% - How request to station staff was handled

81% - The length of the journey was scheduled to take

77% - Punctuality/reliability

78% - Provision of information about train times/platforms

75% - The ease of being able to get on/off the train

## **Areas of low satisfaction**

32% - How train company dealt with delays

36% - The toilet facilities on train

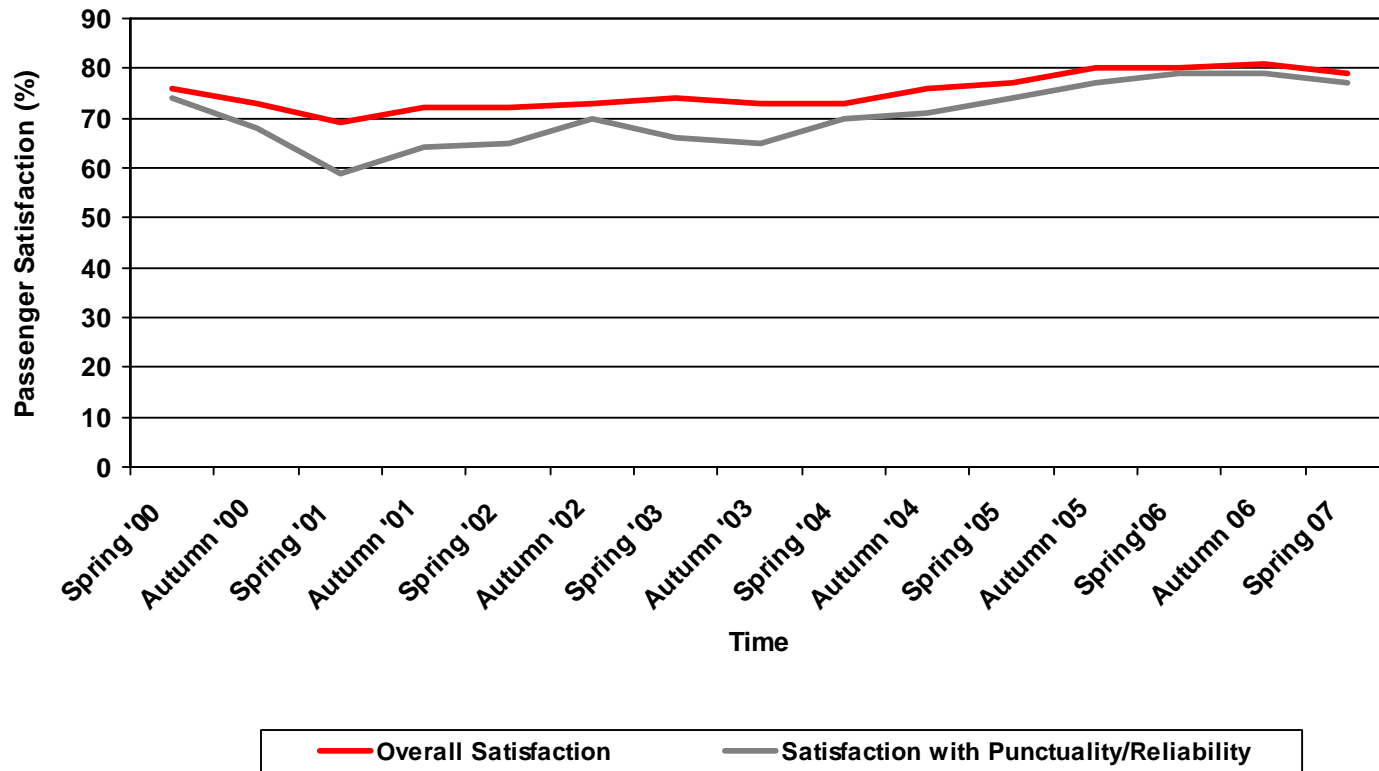
38% - The availability of staff on train

40% - The value for money for the price of your ticket

46% - Facilities for car parking

Source: **National Passenger Survey Spring 2007**

# National Passenger Survey: overall satisfaction vs. punctuality/reliability satisfaction



Source: National Passenger Survey

# Passengers priorities for improvements to rail

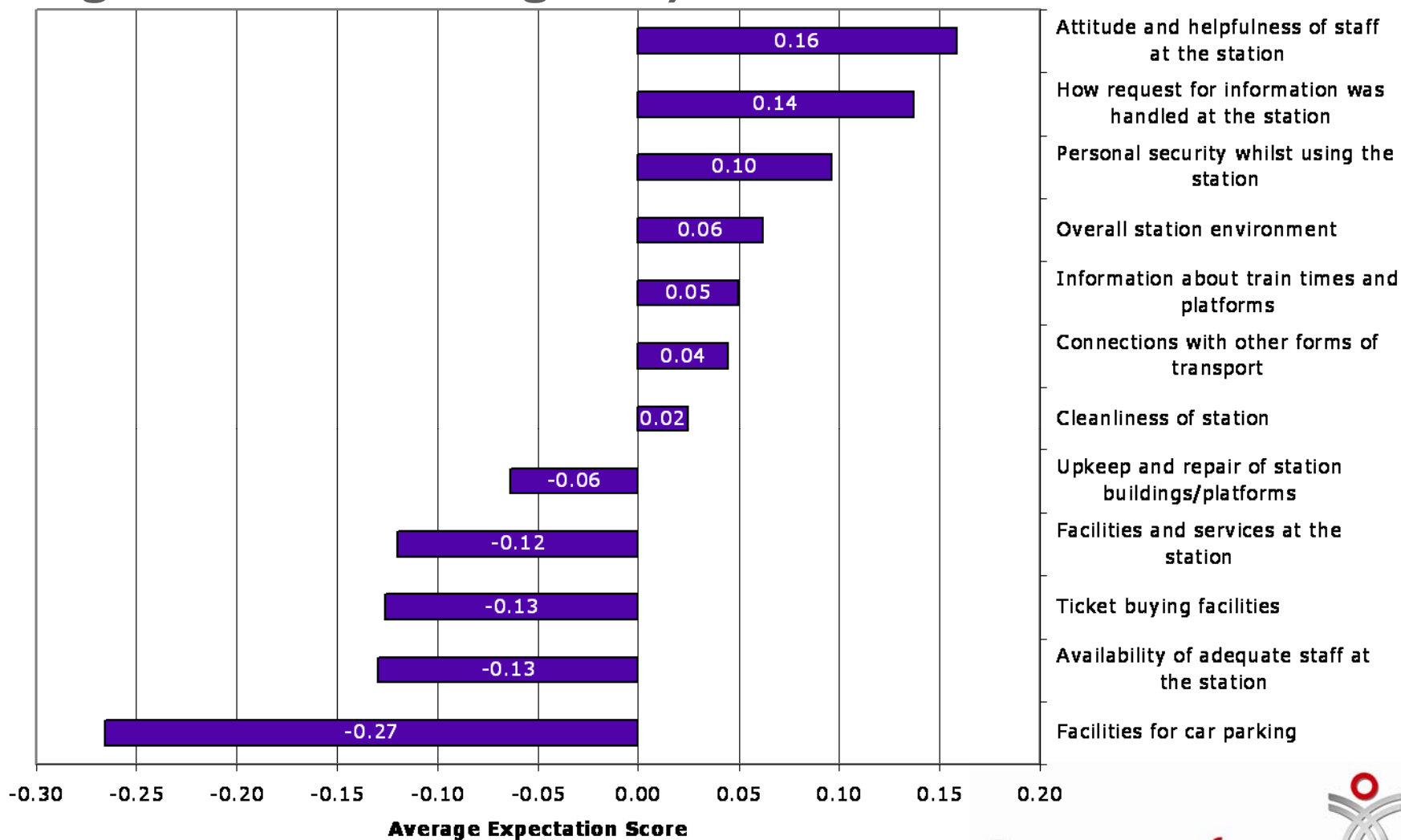
- Joint quantitative research with DfT
- Input into High Level Output Statement
- Identified passengers' expectations of services
- Obtained passengers' current priorities for improvement
- Identified the relative importance that passengers attach to (improving) different elements of their rail journey

# Methodology

- Survey undertaken in England, Scotland and Wales
- Self-completion questionnaires handed out at stations
- Achieved sample of 3,965, reliable data by government office region
- Covering spread of services on weekdays 07:00-20:00 and weekends
- Attributes from NPS tested
- Research undertaken by MVA Consultancy

# GB expectation score for station attributes

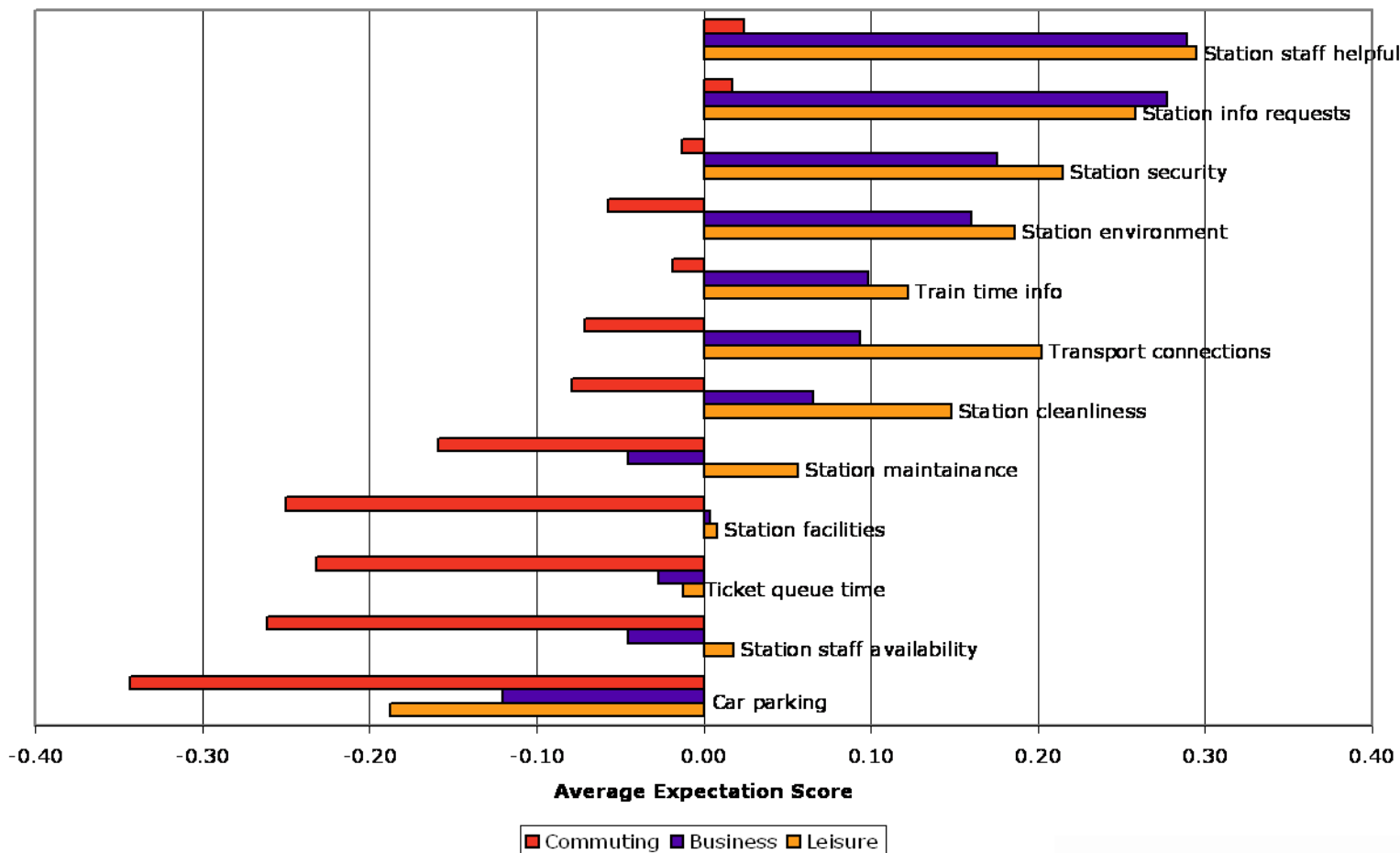
(positive = reasonable expectations exceeded and negative = not being met)



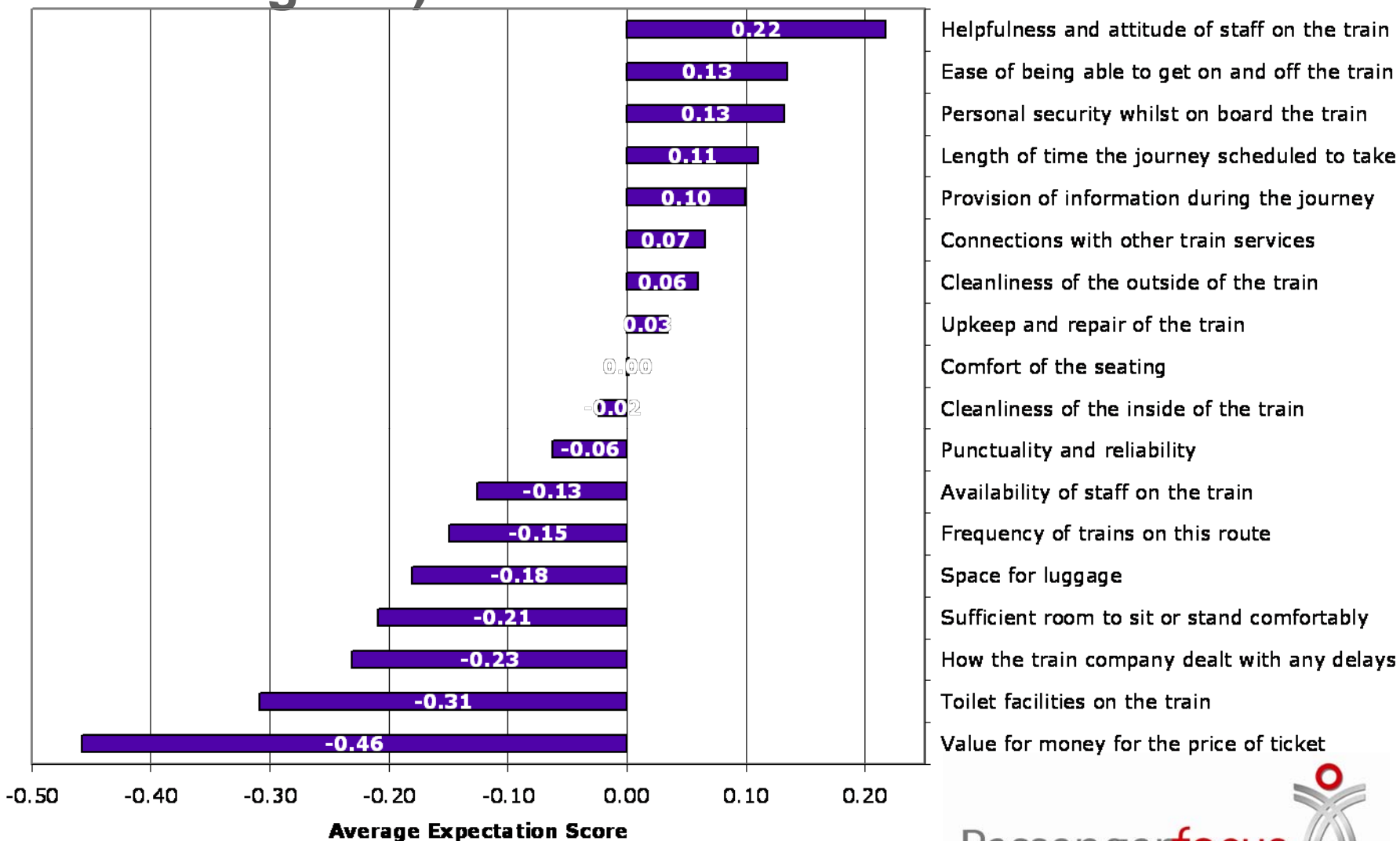


# GB expectation score for station attributes

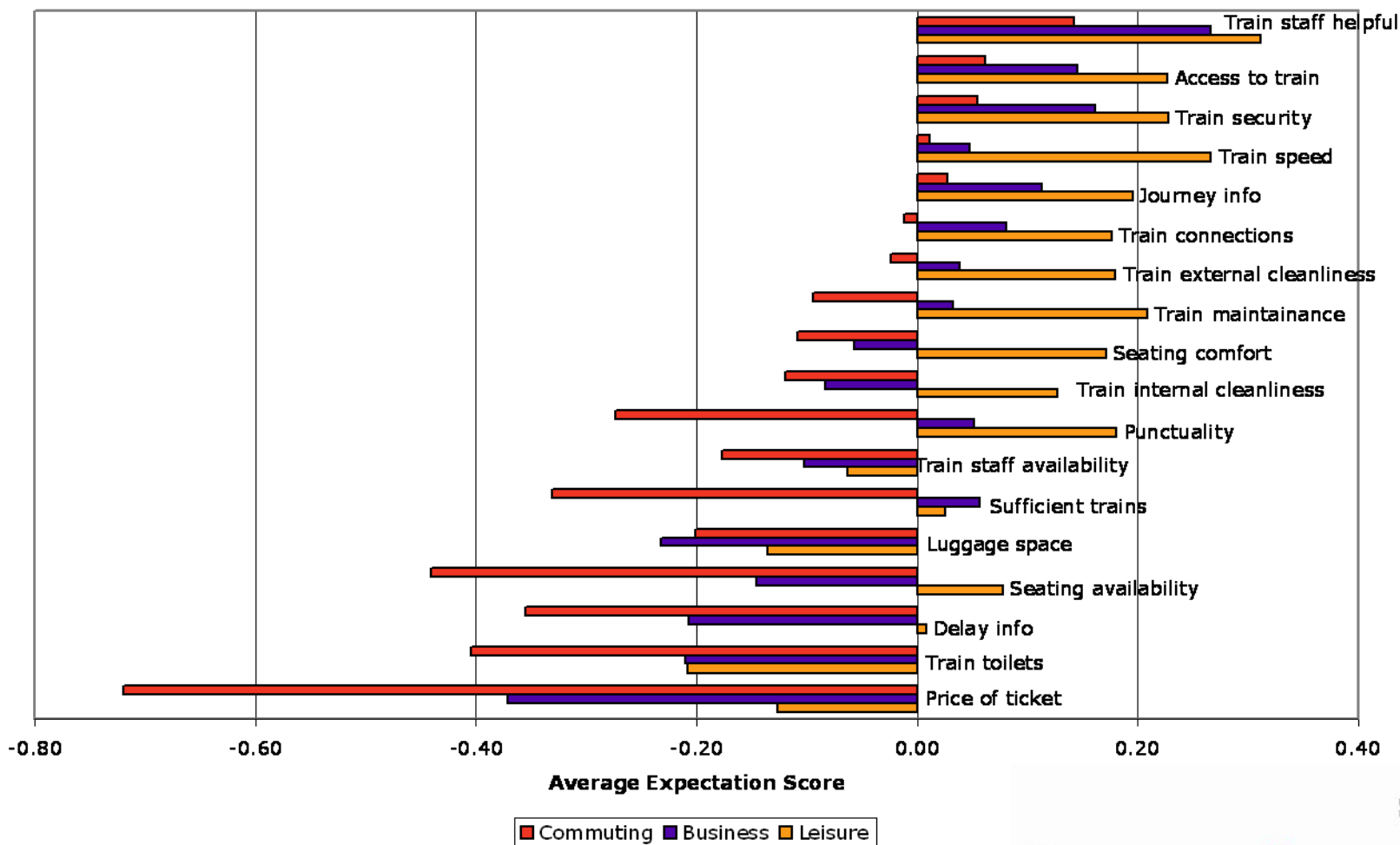
(positive = reasonable expectations exceeded and negative = not being met)



# GB expectation score for train attributes (positive = reasonable expectations exceeded and negative = not being met)



# GB expectation score for train attributes (positive = reasonable expectations exceeded and negative = not being met)



# Importance of improvements - 1

Rank	Attribute
1	Price of train tickets offer excellent value for money
2	Sufficient train services at times I use the train
3	At least 19 out of 20 trains arrive on time
4	Passengers are always able to get a seat on the train
5	Company keeps passengers informed if train delays
6	Maximum queue time no more than 2 mins to purchase tickets
7	Information on train times/platforms accurate and available
8	Trains are consistently well maintained/in excellent condition
9	Seating area on the train is very comfortable
10	Passengers experience a high level of security on the train
11	Personal security at stations is improved through CCTV/staff
12	Good easy connections with other forms of transport
13	Your journey time is reduced by five minutes
14	The inside of the train is cleaned to a high standard
15	Connections with other train services are always good

# Importance of improvements - 2

- 16 The train travels at a fast speed throughout the journey
- 17 Station staff are available whenever required
- 18 Facilities at stations are plentiful and of good quality
- 19 Always a quick response to information requests at stations
- 20 All trains have staff to assist
- 21 All station staff are helpful and with a positive attitude
- 22 Useful information is provided throughout the journey
- 23 All train staff helpful and have a positive attitude
- 24 There is sufficient space for passengers' luggage
- 25 There are good quality toilet facilities on every train
- 26 Station environment always pleasant and comfortable
- 27 Stations are cleaned to a high standard
- 28 All station building maintained to a high standard
- 29 High quality car parking available
- 30 The outside of the train is cleaned to a high standard

# Passenger Focus priorities for improvement survey – spring 2007

- Passengers reasonable expectations were exceeded for half of the service areas tested and fell short for the other half.
- The service areas where experience most exceeds expectations are the attitude and helpfulness of staff, both on train and on the station. Those that are falling furthest short of expectations are:
  - value for money for the price of the ticket
  - toilet facilities on the train
  - car parking facilities at stations
- Improving value for money was ranked as the highest priority for improvement. This was followed by improvements in having sufficient train services, then punctuality, and then seat availability.

# Passenger Focus priorities for improvement survey – spring 2007

- There are marked differences between commuters, leisure and business travellers.
  - **Commuters** feel that the service is falling short of expectations for almost all attributes and give a much higher priority to improvements in journey time savings than other types of passenger.
  - **Business** travellers believe a similar number of expectations are being exceeded as falling short of expectations and they attach more importance to improvements in 'having sufficient train services' than improving value for money of the price of ticket.
  - **Leisure** travellers feel that the service is exceeding expectations for almost all attributes and attach high priority to improvements in seating comfort, and higher priority than other passengers to luggage provision.

# National research – DfT research

- Public experiences/attitudes towards rail travel
  - DfT research 2006
  - asked short-distance travellers (less than 50 miles) about what they value and what could be improved



# DfT Research - findings

- Findings
  - Most valued aspects
    - speed of journeys (selected by 34%)
    - frequency of service (26%)
    - reliability/punctuality (21%)
  - Features that could be improved
    - cost of rail fares (selected by 36%)
    - frequency of train services (22%)
    - reliability/punctuality (20%)

Source: DfT, **Public Experiences / attitudes towards rail travel**

# National Research - conclusions

- Both surveys emphasise the importance of:
  - value for money
  - frequency of service
  - punctuality/reliability

# Regional priorities can differ

- Passenger Focus route based research (2006) designed to inform
  - East Midlands franchise
  - West Midlands franchise
  - New Cross Country Research
  - North Western RUS
  - Scottish RUS
- Gap analysis approach

# Regional priorities

Route	Most important attributes	Priorities for improvement
Liverpool - Norwich	<ul style="list-style-type: none"><li>• Punctuality</li><li>• Provision of information</li><li>• Value for money</li></ul>	<ul style="list-style-type: none"><li>• <b><u>Ticket buying facilities</u></b></li><li>• Value for money</li><li>• Upkeep/repair of the train</li></ul>

# Environmental impact of rail

- Six focus groups to look at awareness of environmental impact of rail, level of interest, impact on travel behaviour
- Environmental impact of journey very low impact on choice of mode, issues such as speed, cost and comfort much more top of mind.
- Green issue seen as an issue for TOCs and government not passengers
- Trains generally seen as less polluting than other modes but some awareness of impact of trains running with low passenger loadings

# Environmental impact of rail (II)

- Limited interest in gaining a further understanding of the environmental impact of different modes
- For those interested would need to be from objective source e.g. Academics
- Passengers enthusiastic about visible gestures of care for the environment such as low energy bulbs on trains and stations, recycling bins at stations, appropriate temperature control. These kind of initiatives are in keeping with what many are doing in their home and are therefore easy to identify with.

# Passenger Focus – other research...



- National Passenger Survey...next wave due Jan 2008
- Mystery Shopping – ticket retailing, APRS, Southern TOC
- Car parking – Greater Anglia study
- Route Utilisation Strategies
- Edge of peak research



[www.passengerfocus.org.uk](http://www.passengerfocus.org.uk)