



OFFICE OF RAIL REGULATION

# Rail passenger experience report

April 2014

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# Summary

## Purpose

1. The ORR has regulatory responsibilities covering a wide range of firms and services necessary to deliver Britain's railways. Our role covers the financing and operation of rail infrastructure, through regulation of Network Rail, oversight of access to this infrastructure, consumer protection and competition law, all of which can significantly affect passengers. We need to understand the experience of passengers to ensure we regulate effectively and proportionately.
2. The report:
  - (a) "takes stock" of the experience of rail passengers and their concerns;
  - (b) builds the evidence base of outcomes for passengers when using railways; and
  - (c) informs us how measures to improve passengers' experiences may be working.
3. This report may also be of interest to train operating companies, passengers groups, consumer representatives and others interested in understanding the outcomes and experiences of passengers buying rail services.

## Approach

4. From a consumer perspective, purchasing a rail ticket is the same as purchasing any other service: there are a series of decisions to be made before, during and after the purchase necessary to get good value. In this report we examine each of these steps in detail, and build an evidence base on what the rail passenger experience looks like. This uses a wide range of additional data, not limited to overall passenger satisfaction, to inform our views.
5. Our approach to understanding and assessing the quality of passengers' experience is built on a number of steps:
  - (a) we set out the 'passenger journey' – the transaction process people engage in to compare trains with other modes, buy tickets and use trains, considering what is important for a 'good' experience using a framework of principles;
  - (b) we describe the key evidence or data relevant to each stage of the transaction; and
  - (c) we consider the experience of passengers as a whole and whether certain groups of passengers or those with certain needs or characteristics are systematically better or worse off.
6. We have drawn on a wide range of existing research. This includes data from the rail industry that ORR holds and published research into specific issues, such as ticket

complexity. We have also drawn on results from the National Rail Passenger Survey (NRPS). The rail industry itself, in particular Network Rail and train operating companies, engage daily with the passengers using their services. We have met with operators to look at how they engage with and respond to their passengers, and will be publishing these findings separately highlighting good practice or innovative approaches.

7. In partnership with Passenger Focus we have undertaken new research. This was aimed at understanding peoples' travel habits when comparing rail and other modes of transport. It also looked again at some of those issues previously raised as problematic, such as ticket complexity or passenger information during disruption.

## Findings

8. The summary below sets out the key findings or insights based on three stages of the passengers' transaction.
  - (a) **Planning a journey, chapter 3:** this presents and assesses the evidence of passengers' experience when planning a journey, comparing options and in some cases buying tickets. This includes comparison between modes of transport, for which we have undertaken new research, as well as comparing rail options.
  - (b) **The journey, chapter 4:** this presents and assesses the evidence of using the railways, from arriving at the station, purchasing tickets and quality of the rail journey. This draws on a wide range of existing research and data.
  - (c) **After the journey, chapter 5:** this presents and assesses the evidence of how effectively passengers can seek redress.
9. The following summarises key points for each stage.

### Planning a journey

10. This focuses on passengers' experience of: comparing modes of transport when planning a journey; using information and advice to plan a rail journey; and buying a rail ticket before the day of travel (i.e. in advance). Key findings are set out below.
  - (a) A significant minority (one-quarter) of leisure/ business rail passengers compare rail with different modes of transport when planning a journey. About a fifth of commuters also compare rail to alternative modes. The car is the main alternative considered.
  - (b) The key factor for leisure/ business passengers for choosing rail is the cost. For commuters, the reliability of journey time is the most important factor but this is the most difficult factor to compare between modes of transport.

- (c) Online sources of information are widely used and trusted to plan journeys. The internet is also the principal channel used to buy tickets before the day of travel, but commuters continue to use ticket offices to renew season tickets.
- (d) People that do not use the internet do not feel unduly disadvantaged when planning journeys but do consider they may be losing out by paying higher fares. Other groups of passengers, for example people with visual impairments, may have difficulty using some websites or apps that have not been suitably adapted.
- (e) The rail industry has improved how it communicates with passengers before and during planned works, in particular so passengers are aware of changes to services and alternatives routes or use of rail replacement bus services. However, passengers are not sufficiently made aware of the longer term benefits from the engineering work undertaken.
- (f) Advance tickets appear to be well established with some groups of passengers, principally leisure/ business passengers travelling long distance. Some passengers may not always be taking advantage of better deals, for example those taking day trips may not consider their ticket options carefully. Commuters have limited flexibility with the current fare structure.
- (g) Ticket restrictions appear to be much clearer to passengers buying tickets before the day of travel, especially if purchased online. However, even with online sales channels, over 20 per cent of people are unsure whether ticket restrictions were brought to their attention during the sales process.

## The journey

11. This considers four key steps: at the station, when planning or continuing journeys; purchasing tickets on the same day when planning to travel; on the train, considering punctuality, comfort, safety and information; and managing delays and disruption. Key findings follow.
- (a) Passenger satisfaction scores have generally improved over recent years. However, despite historic improvements to rail performance (i.e. punctuality) not all regulated targets have been met since 2010-11, specifically in the long distance and London & South-East sectors.
  - (b) The industry appears to suffer from a persistently poor perception of its services, which is often out of line with passengers' individual experiences. This is illustrated in the higher satisfaction experienced by passengers that have asked rail staff for assistance compared to the ratings given for staff attitude and helpfulness in general.
  - (c) Some train operators are introducing innovations. For example, developing e-tickets that offer greater convenience to passengers or exploring new ways of providing information to help plan journeys, such as about train crowding or disruption to services.

- (d) Ticket buying habits are changing with growing use of online sales channels, but many passengers buying tickets on the day of travel are still likely to use ticket offices (57%), with around one third using ticket vending machines (TVMs). Older passengers are more reliant on ticket offices. People who are not working or working part time are more likely to purchase tickets on the day.
- (e) We have found significant variation between sales channels for when, if at all, passengers are given information about ticket restrictions. For example, nearly 30 per cent of respondents buying from a ticket office stated they were not informed about ticket restrictions. Our qualitative research found that some people still perceive rail fares as complex or counter-intuitive. This is exacerbated where passengers do not have a clear reference or benchmark price against which to compare rail fares, for example where they do not make the same journey regularly.
- (f) Previous research, for example by Passenger Focus, also found some confusion or complexity with ticketing. This affected passengers using ticket offices or TVMs. In the case of TVMs the main issue was the lack of intuitive prompts or instructions to guide passengers to making the best purchase and insufficient explanation of ticket restrictions.
- (g) Passengers have more ways of finding out about rail services and any disruption to scheduled services, with a growing use of apps. These are seen as complementary to traditional information channels (i.e. display screens and public announcements).
- (h) Despite greater access to information, passengers' experience of delays remains poor. Less than two-fifths of NRPS respondents were satisfied with how train operators manage delays. A third of passengers travelling for leisure/ business and nearly half (47%) of commuters state they received no information about delays whilst on board the train. A significant minority also report that the information supplied was not useful for them to manage the delay.
- (i) Disabled passengers share many of the same concerns as passengers overall with punctuality and reliability of trains a key concern. There is some evidence that rail services are not serving disabled passengers well on every occasion: additional assistance is not always working smoothly on the day, facilities such as TVMs are not always accessible to disabled passengers and disabled people feel slightly less safe compared to passengers overall.

### After the journey

12. This focuses on the more formal ways in which passengers engage with or contact their train operator, including: recognising good service or performance; registering a complaint or grievance; and making a claim for compensation. The Key findings are set out below.

- (a) The number of complaints to train operators has been falling steadily (by nearly 60% since 2003-04). This may suggest that train operators are dealing with passengers more effectively, avoiding complaints.
- (b) Just over 1 in 10 people eligible for compensation due to a delay actually make a claim. Overall, passengers are not well informed about their rights to compensation with two-fifths of people stating they know nothing at all about their compensation rights. Detailed findings on passenger awareness and take-up of refunds and compensation has been separately published by ORR in February 2014.
- (c) Train operators have developed a number of approaches to help raise awareness and access to compensation. This includes a toolkit developed by ATOC to help train operators ensure passengers understand their rights and can exercise them.

## Developments

- 13. Rail travel has grown significantly, with many thousands of journeys made successfully every day. Many people that had not previously travelled by train are now using the railways more regularly. The growth in the railways has continued despite difficult economic conditions, with households facing a squeeze on their living standards. This has been achieved with growing passenger satisfaction, matching improvements to performance over time.
- 14. Nevertheless, there is room for improvement to ensure passengers make informed choices, receive a good quality service and are able to exercise their rights successfully. Our findings reflect existing issues of concern:
  - (a) inconsistency in making consumers aware of relevant ticket restrictions or other terms necessary to make an informed choice;
  - (b) information for passengers during disruption that is not always consistent or helpful to plan or manage their journey; and
  - (c) poor awareness and take-up of compensation by passengers eligible due to delays.
- 15. In addition, an overall theme suggested by the evidence is that passengers may, from time to time, lack confidence in the rail services provided. Ticket restrictions and the terms used remain confusing for some passengers (for example, paragraphs 3.37 to 3.38 below), and a substantial minority of people do not find information provided during delays useful (for example, paragraphs 4.59 to 4.60 below). This research does not investigate whether this uncertainty is limited to a particular passenger group or other circumstances (for example, sales channels), or whether people can adapt and learn over time.

16. We have a developed work programme, reflected in our business plan, that addresses a number of these concerns. In many cases, the industry has led or implemented changes to meet these challenges. Our focus ahead will be to ensure progress across the issues identified, with an improvement to the outcomes experienced by passengers.

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# 1. Introduction

## Purpose of this report

- 1.1 The ORR has regulatory responsibilities covering a wide range of firms and services necessary to deliver Britain's railways. Our role covers the financing and operation of rail infrastructure, through regulation of Network Rail, oversight of access to this infrastructure, consumer protection and competition law, all of which can significantly affect passengers. As a result, we need to understand the experience of passengers to ensure we regulate effectively and proportionately.
- 1.2 The report:
  - (a) 'takes-stock' of the experience of rail passengers and their concerns;
  - (b) builds the evidence base of outcomes for passengers when using railways; and
  - (c) informs us how measures to improve passengers' experience may be working.
- 1.3 This report may also be of interest to train operating companies, passengers groups, consumer representatives and others interested in understanding the outcomes and experiences of passengers buying rail services.

## Structure of this report

- 1.4 This report includes the following chapters:
  - (a) Chapter 2 – **Approach and background** - explains how we have organised and collected the research into the passenger experience and background information on key trends in passengers' use of railways, providing a context for the subsequent chapters;
  - (b) Chapter 3 – **Planning a journey** - presents and assesses the evidence of passengers experience when planning a journey, comparing options and in some cases buying tickets;
  - (c) Chapter 4 – **The journey** – presents and assesses the evidence of using the railways, from arriving at the station, purchasing tickets and quality of the rail journey; and
  - (d) Chapter 5 – **After the journey** – presents and assesses the evidence of how effectively passengers can seek redress.
- 1.5 Chapters 3 - 5 are structured in a similar way: each key step in the transaction is presented with a summary of existing published research, relevant results from the National Rail Passenger Survey (NRPS) and new research (see paragraphs 2.2 and 2.9 below). Each chapter concludes with the main themes and issues arising from the data and brief outline of the actions being taken to address issues of concern.

1.6 This report also includes a number of annexes:

- (a) Annex A: National Rail Passenger Survey – additional data, presents supplemental data from the NRPS;
- (b) Annex B: The operation and regulation of passenger railways;
- (c) Annex C: Passenger train operating companies, lists the owning groups and franchised or open access services operated by those groups with a brief description of the types of services operated;
- (d) Annex D: Online journey planning and ticket retailing, provides additional information on the digital services offered to passengers by train operators; and
- (e) finally, a glossary of terms and abbreviations.

## 2. Approach and background

### Summary

- For this report we have looked at the key steps in the passengers' journey: planning a journey; choosing tickets and the quality of the rail service; and, redress if delayed. For each step we have considered how well people can make decisions and the quality of service provided to them.
- The evidence considered in this report includes a wide range of existing published research (including rail industry performance data collected by ORR), the National Passenger Survey and new research, commissioned with Passenger Focus' support.
- Our new research has focused on how passengers plan journeys. It has also looked again at those areas of concern identified in the past, such as passengers' experience when buying tickets and information received during the journey if a disruption or delay occurs. We use four principles (access, quality, empowerment and choice) as a framework to help focus our research and assessment of the data.
- When assessing the experience of rail passengers we have been mindful of the wider difficult financial conditions facing consumers more generally, with household budgets squeezed by the rising cost of living. This places greater pressure on the railway to deliver good value and for passengers to be confident they can compare and choose the most suitable ticket for their journey or claim compensation when eligible.
- Despite the rising cost of using railways passenger numbers have grown significantly, with a growing number of people using the train regularly for the first time. This increase in use is mainly to get people to and from work, an essential function of the railway that supports the wider economy.
- The growth in passenger numbers is supported by significant investment for key rail infrastructure projects. Much of this investment is being partly paid for by the taxpayer. Although passengers are now the main funders for the railway, it remains dependent upon public subsidy and under scrutiny to deliver good value for money.

### Introduction

- 2.1 The chapter explains our approach to selecting, reporting and interpreting the evidence of outcomes for rail passengers. It also provides background information on key trends in passengers' use of railways, providing a context for the subsequent chapters.

## Approach

- 2.2 Our approach to understanding and assessing the quality of passengers' experience is built on a number of steps:<sup>1</sup>
- (a) we set out the 'passenger journey' – the transaction process people engage in to compare trains with other modes, buy tickets and use trains, considering what is important for a 'good' experience using a framework of principles;
  - (b) we describe the key evidence or data relevant to each stage of the transaction; and
  - (c) we consider the experience of passengers as a whole and whether certain groups of passengers or those with certain needs or characteristics are systematically better or worse off.
- 2.3 Each chapter (3, 4 and 5) deals with the data in the same way: it sets out a summary of the published research or rail industry data relevant to the specific step in the transaction, reviews relevant data from the National Rail Passenger Survey (NRPS) and introduces new research findings (commissioned with Passenger Focus) where available. Our approach to research is discussed in more detail at paragraph 2.9.

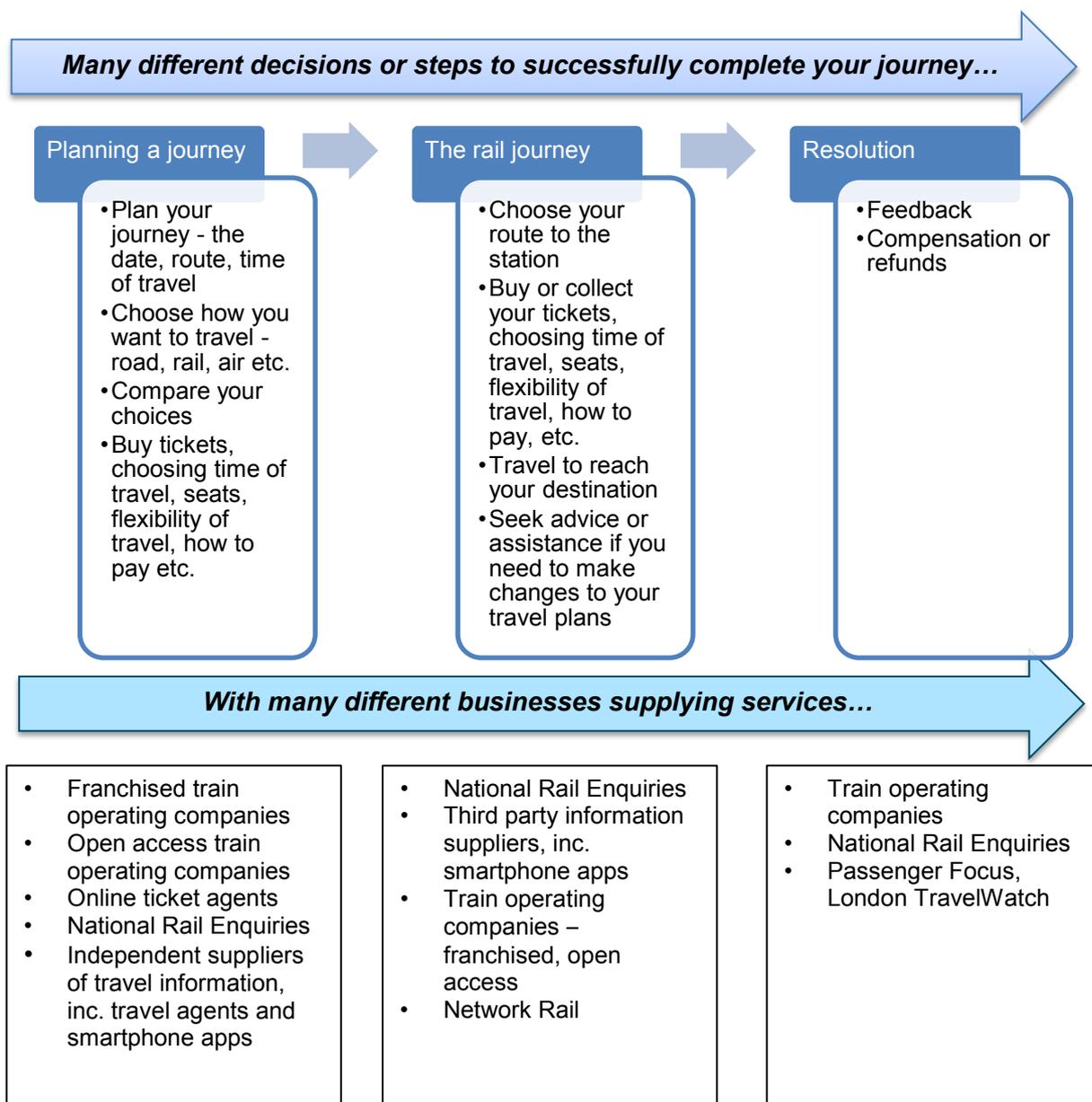
### Key steps in the transaction

- 2.4 Planning and taking a journey involves a number of choices and may require people to use services provided by several businesses. This is illustrated for a rail journey in Figure 1 below.

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<sup>1</sup> 'Passengers' refers to individual consumers purchasing rail services, usually for personal use. In most cases passengers will be protected by consumer law, in addition to industry-specific rules.

**Figure 1: The rail passenger journey and services**



2.5 Each step of the transaction requires key decisions to be made. These steps are:

**Planning a journey**

- (a) planning a journey and comparing options such as prices, routes or other factors; and
- (b) purchasing a ticket before the day of travel.

**The Journey**

- (c) arriving or leaving a station and using the services available at the station;
- (d) purchasing a ticket on the day of travel;
- (e) experience of the train journey, its performance and comfort; and

- (f) the management and experience of delays or disruption.

### **Resolution**

- (g) understand and obtaining redress if services are not delivered to the promised standard.

## **Assessing passengers' experience**

2.6 The work of Passenger Focus, London TravelWatch and others has highlighted a number of existing concerns of passengers with rail services:

- (a) value for money;
- (b) the accuracy and timeliness of information during disruption;
- (c) the complexity of ticketing; and
- (d) comfort, security and environment of the rail journey.

2.7 To make good decisions people will need the right information, at the right time, and have the confidence to use this information. People also need to have a range of choices that meet their needs that are offered clearly and fairly.

2.8 We have adopted four broad principles as a framework to guide the type of evidence we need and to help us assess passengers' experience. The principles are:

### **Access**

- (a) conditions that enable passengers to travel on rail services, including
  - (i) physical access to stations and trains,
  - (ii) information or other factors that affect some passengers' ability to use the railways, for example limited access to the internet may place some passengers at a disadvantage (a 'digital divide'); and
- (b) a range of tickets or services that meet different needs, allowing many types of passengers to use rail services.

### **Quality**

- (c) prompt, reliable services meeting the timetabled (i.e. promised) service;
- (d) comfortable and safe environment; and
- (e) effective resolution of issues affecting rail performance.

### **Empowerment**

- (f) available, accurate and timely information;
- (g) clear and accurate advice, at point of need;
- (h) fair terms and conditions for services, objectively enforced; and
- (i) access to prompt and meaningful redress.

## **Choice**

- (j) clear choices that are easy to exercise, suiting different passengers' needs; and
- (k) clear comparison of choice between products and providers (e.g. ticket retailer).

## **Research**

2.9 We have drawn on three types of data for this report:

- (a) previous research – comprising public data reported by ORR through its data portal, existing published research on passengers' experiences, for example past work undertaken by Passenger Focus and data published by the Department for Transport (DfT), ONS and Bank of England;
- (b) the National Rail Passenger Survey – the survey is undertaken twice yearly by Passenger Focus. We have used data based on the combined results for the Autumn 2012 and Spring 2013 survey or the time-series of responses to certain questions where available, from spring 2004 to spring 2013; and
- (c) new research – to support this report we commissioned new research, undertaken jointly with Passenger Focus, which included a quantitative survey and qualitative research.

2.10 Our new research included two elements:

### **Quantitative survey**

- (a) 2,028 surveys were completed using an online panel focusing on journey planning, ticket buying and information needs, including during disruption;
- (b) the surveys were collected only among those who travelled by rail within the last 3 months, could specify the reason for their last trip and state their origin and destination for the journey.

### **Qualitative research**

- (c) 6 focus groups (London, Manchester and Birmingham), covering a range of travel habits, TOCs, purpose of travel and planning habits;
- (d) 4 in-depth interviews with 'offline' passengers;
- (e) 6 in-depth interviews with disabled passengers; and
- (f) 4 case studies with passengers who have complained to demonstrate good and bad practice.

2.11 We present selected results in the 'new research' section of chapters 3, 4 and 5. Responses to the qualitative research are summarised with key quotes to illustrate respondents' opinions. We have not collected new research on all of the key steps in the transaction, focusing our research on travel planning and issues that had previously been raised as a concern. The full research reports are published separately.

- 2.12 When reviewing the research we have considered whether or how peoples' experience may differ depending upon their own circumstances (age, gender, familiarity with a route etc.) or the type of journey, mainly depending upon the distance and time of travel.
- 2.13 In many cases the existing data we have drawn upon is not recorded on a similar basis. We have therefore been cautious when drawing conclusions given the wide range of sources. Key data issues include:
- (a) there is no standardised way of categorising different rail routes or journeys. We have used 'sectors', comprising a combination of routes in a broad geographic area, which include London and South East, Long Distance, Regional and Scotland. We have also used ONS 'regions' and the origin and destination of respondents to our quantitative research to help provide an indication of where people are travelling and the distance; and
  - (b) passengers' experience is often recorded on the basis of purpose of travel, such as commuting, business or leisure. In other cases we have used data developed to monitor Network Rail or report on TOC efficiency that uses franchise or Network Rail operating routes.
- 2.14 We are grateful to Passenger Focus for its support, including joint funding of the new research for this report. The ORR is solely responsible for the conclusions and views presented in this report.

## Background

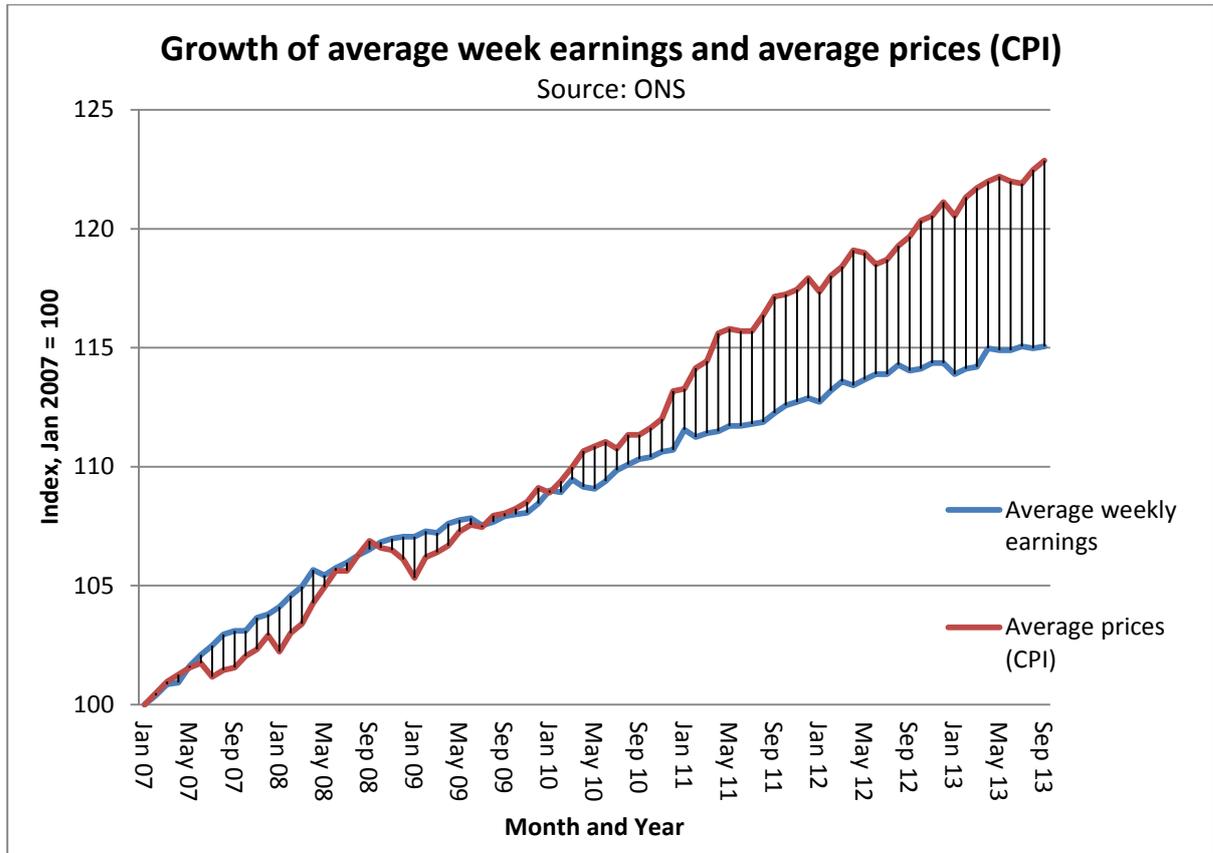
- 2.15 This section sets out background information to support subsequent chapters. It includes:
- (a) key trends affecting passengers – how consumers have been affected by wider economic circumstances, trends in passenger use of the railways, including use of alternative modes of transport, overall performance of railways and passenger satisfaction; and
  - (b) passenger rights – the arrangements for complaints handling, compensation for delays and obligations on train operators to assist disabled passengers.

## Key trends affecting passengers

### Consumers and the economy

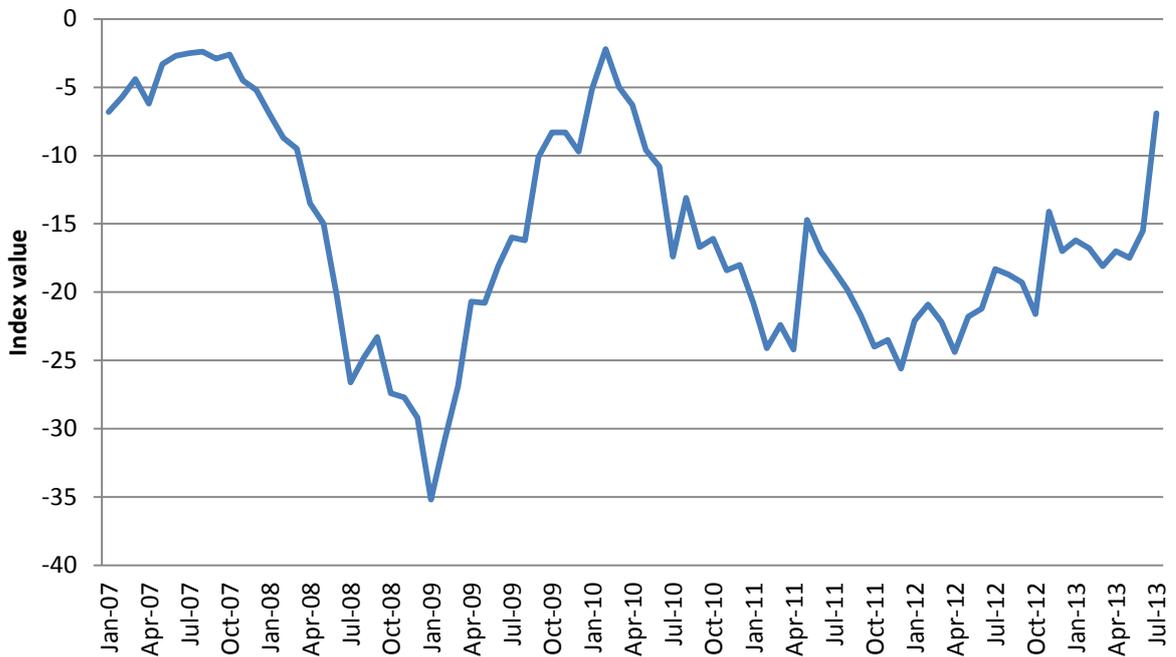
- 2.16 Consumer's decision to travel by rail is affected by prices they face for other goods and services. Consumers have faced difficult conditions since the 2008 financial crises and subsequent recession, and only since the beginning of 2013 have we seen a gradual economic recovery. These conditions have led to weakening household spending power, where price rises have not been matched by increases in wages, and weak consumer confidence. Rising prices have affected many essential goods

and services, such as food, energy and transport, which place a further strain on household budgets.<sup>2</sup>



<sup>2</sup> Data from the ONS shows that households reduced the amount of non-discretionary goods and services purchased by 3 per cent over 2008-09, but by 9 per cent for discretionary purchases. Overall, households bought slightly less or about the same amount of goods and services but paid more for this. See *Impact of the recession on household spending*, 21 February 2012, ONS.

### Consumer confidence, UK



Source: Eurostat

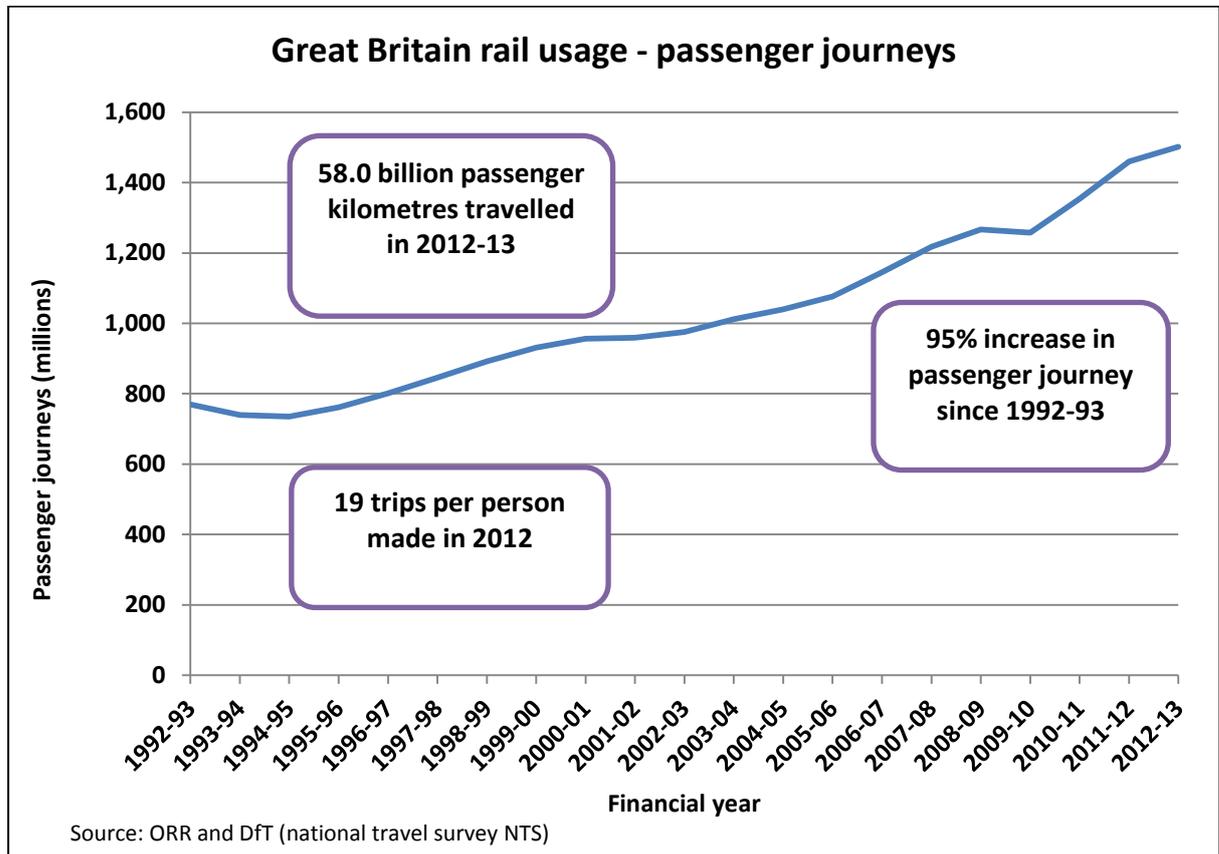
### Cumulative inflation & average weekly earnings (2007 - 2012)



Source: ONS

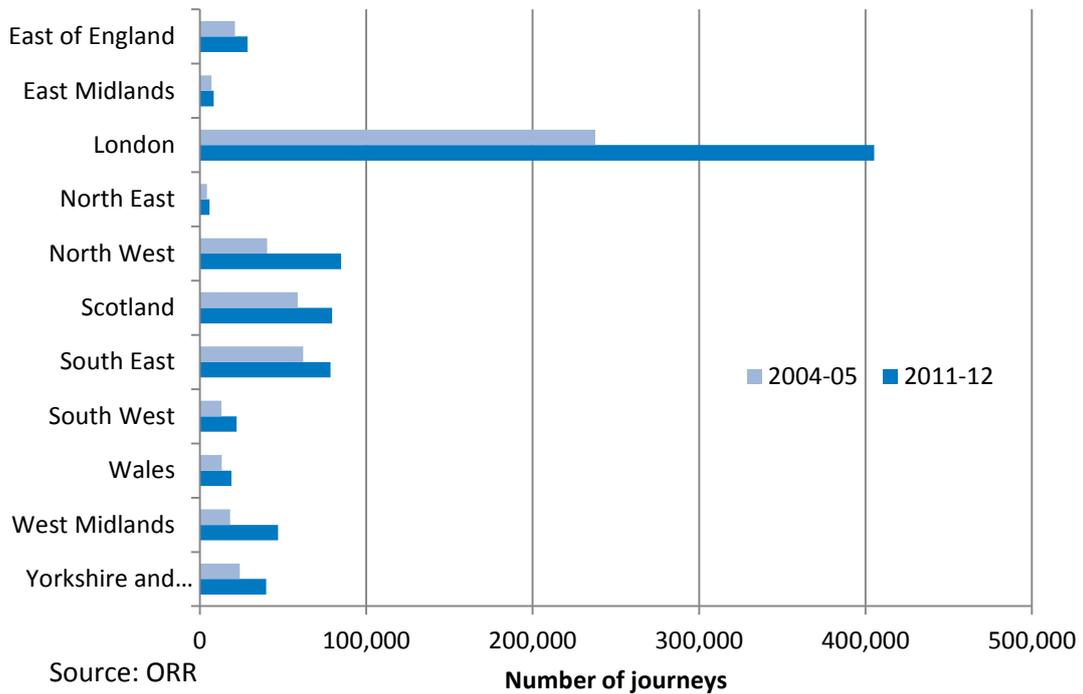
## Passenger use of the railway

2.17 Despite these difficult financial conditions, use of the railway has increased significantly in recent years. Record numbers of journeys are now being made on Britain's railways. Since 1992 the number of rail journeys has grown by 95 per cent with over two-fifths of all journeys made in London.<sup>3</sup> Regardless of this significant growth in rail travel, private cars continue to dominate peoples' travel habits.

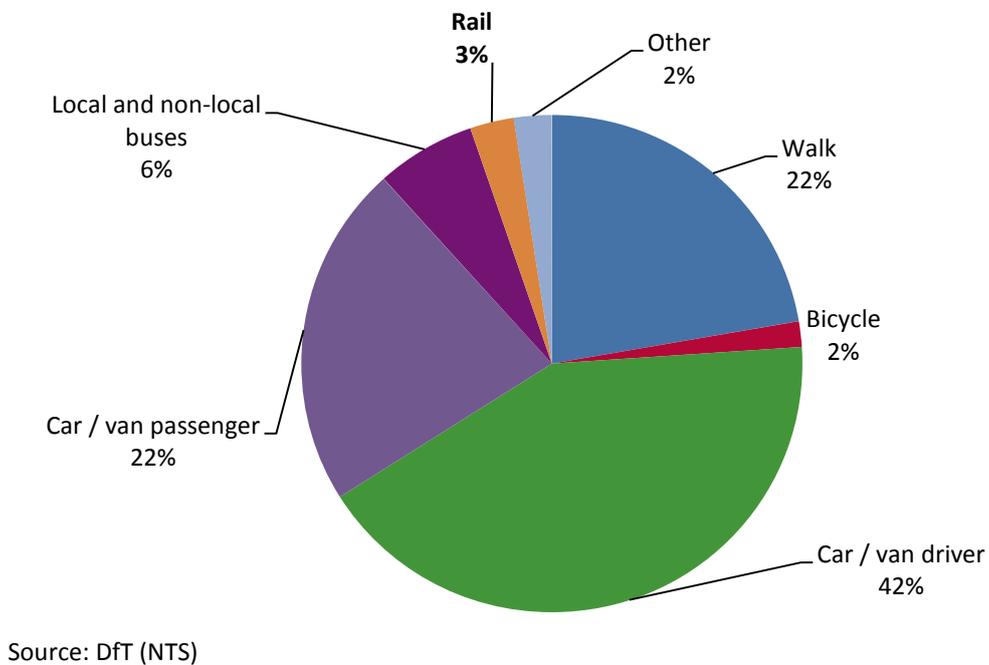


<sup>3</sup> Data based on Sectors shows that nearly 70 per cent of journeys are made in London and the South East in 2012-13 (see ORR passenger journeys by sector).

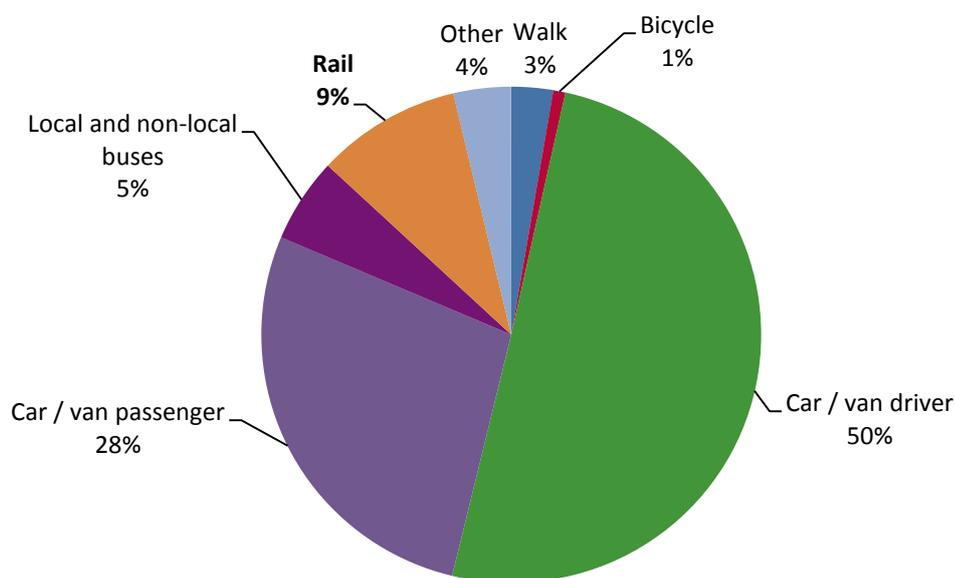
### Number of rail passenger journeys within English Regions, Wales and Scotland 2004-05 and 2011-12



### Mode share - average number of trips: Great Britain, 2012



### Mode share - average distance travelled: Great Britain, 2012

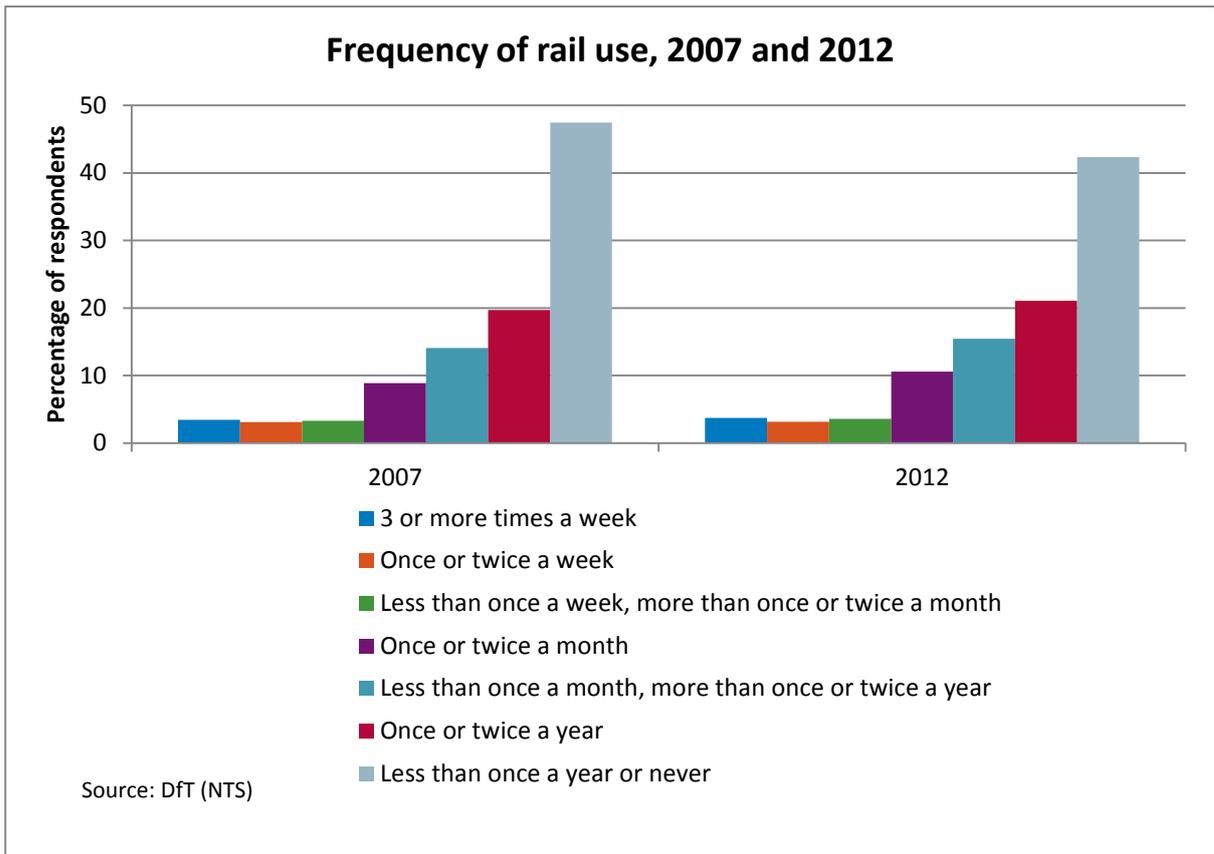


Source: DfT (NTS)

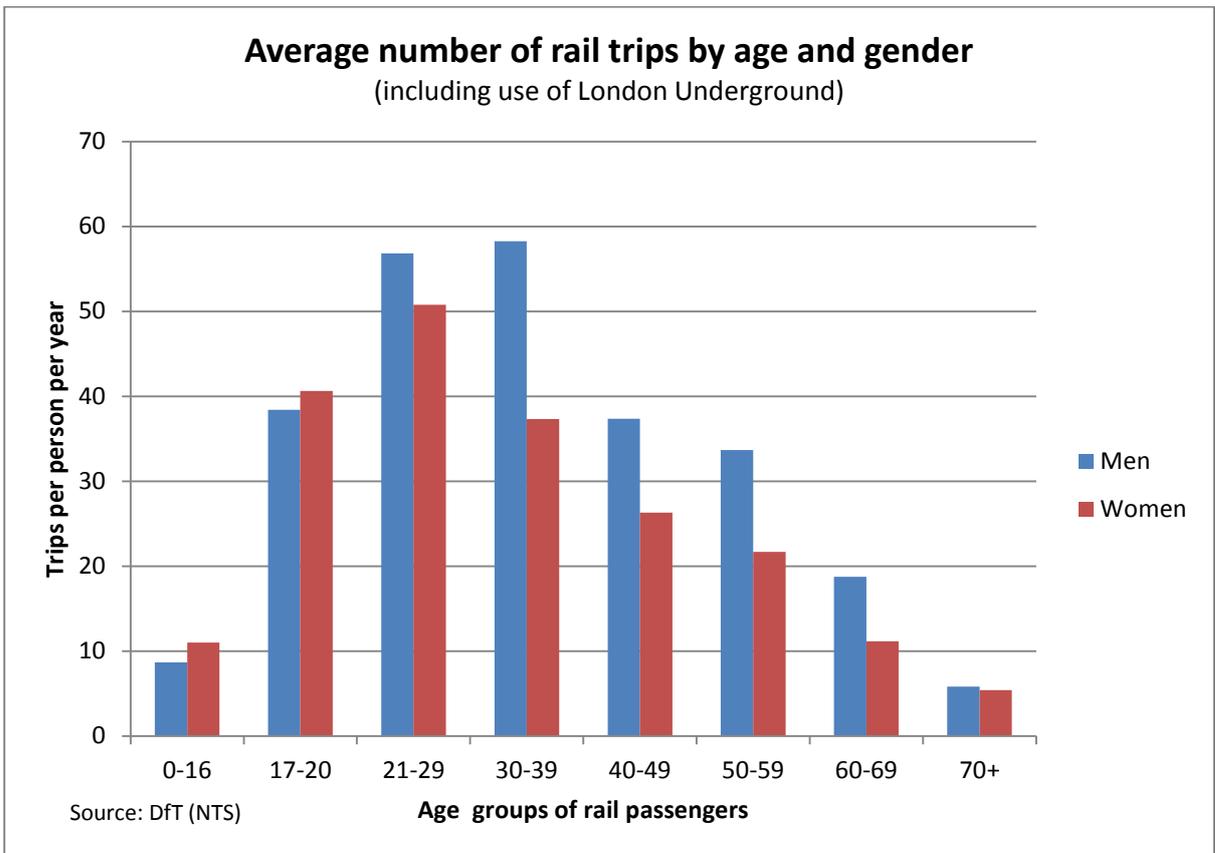
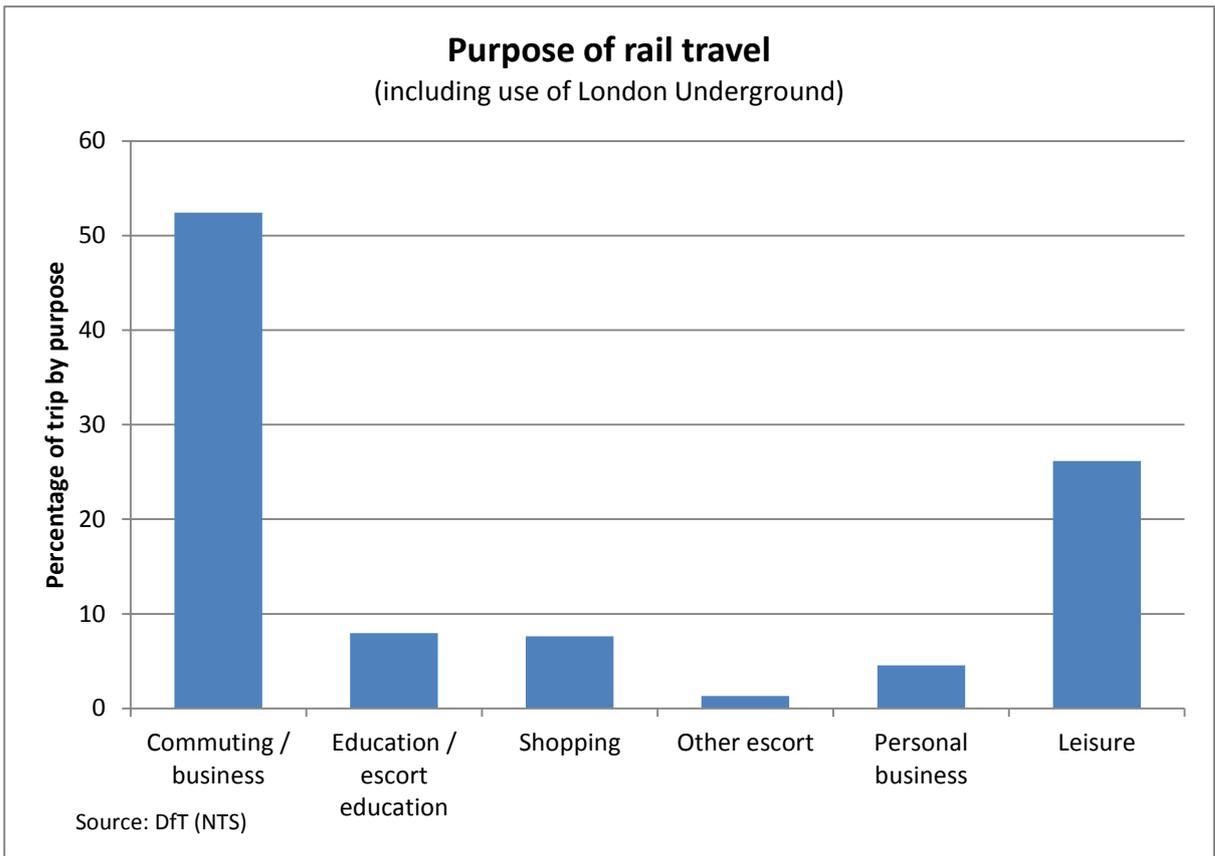
2.18 Many people that had not previously travelled by train are now using the railways more regularly (rather than greater use by existing rail passengers).<sup>4</sup> For example, 47 per cent of people in 2007 stated they only travel by rail at most once a year or never, by 2012 fewer people reported that they rarely or never use trains (42%).

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<sup>4</sup> Page 80, *On the Move, Making sense of car and train travel trends in Britain*, December 2012, S. Le Vine and P. Jones (<http://www.rail-reg.gov.uk/server/show/ConWebDoc.11059>).



2.19 For those that do travel by rail the main reason is to travel to work or for business followed by leisure travel such as visiting friends or attending entertainment or sporting events. More men tend to travel by rail than women, while younger (16 years or less) and older (70 years+) people are least likely to use trains frequently.



### **Box 2.1 – Rail passengers and access to the internet**

Use of the internet, at home, work or on the move, is now widespread. Data from Ofcom shows that 4 out of 5 households within the UK have internet access, with 77 per cent of households using either fixed and/or mobile broadband. Ofcom also found that 82 per cent of adults owned at least one internet connected device, with smartphone ownership increasing the most from 34 per cent in 2011 to 45 per cent in 2012. The Office of National Statistics (ONS) found that 73 per cent of adults accessed the internet every day.

Our research shows widespread reliance by rail passengers on the internet, and increasing use of apps on mobile devices such as smartphones, to plan journeys but also to manage delays (see paragraphs 3.32 and 4.56).

However, access and use of the internet is much more prevalent amongst the younger generation. Ofcom's data shows smartphone ownership common to all age groups under 65, but only 1 in 10 65-74 year olds and 3 per cent of those over 75 years own a smartphone. The ONS also found that 9 in 10 people aged 16-24 had used their mobile phone to access the internet, but less than 1 in 10 aged 65 or more.

Access to mobile signal – whether for voice communication or access to the internet – is not always reliable on trains. Research conducted for Ofcom into 'not-spots' (areas with weak, intermittent or missing mobile signal) found poor coverage along railway lines and that rail carriages themselves can weaken signals.<sup>5</sup> Access to Wi-Fi also varies between train operators and is not usually supplied free of charge.

Recent franchise announcements, such as Thameslink and Great Western, have included requirements to improve Wi-Fi coverage, in particular for long distance journeys. Despite planned improvement to internet access the franchises still require information to be supplied to all passengers, including those without ready access to the internet.

## **Performance and satisfaction with the railways**

2.20 A key measure of train performance is punctuality. Punctuality is measured by public performance measures (PPM), which is the percentage of trains arriving within five minutes of the destination arrival time for London and South East and regional operators, or ten minutes for long-distance operators. Non-franchised train operators are measured as on time if they arrive at their final destination within ten minutes of

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<sup>5</sup> See *Not-spots research, Impacts, causes and potential solutions for areas of poor coverage, not-spots*, 30 April 2010, PA Consulting Group.

the planned timetable.<sup>6</sup> The PPM targets in 2012-13 are outlined in table 1. Performance targets are also set for the number of trains causing significant disruption to at least some passengers (i.e. lateness at final destination greater than 30 minutes, of full/part cancelled or missed station calls). This measure is called CaSL (cancelled or significantly late). Both PPM and CaSL are measured as a percentage of planned services. These targets have been reviewed and reset as part of the 2014-19 periodic review of Network Rail's performance and targets.

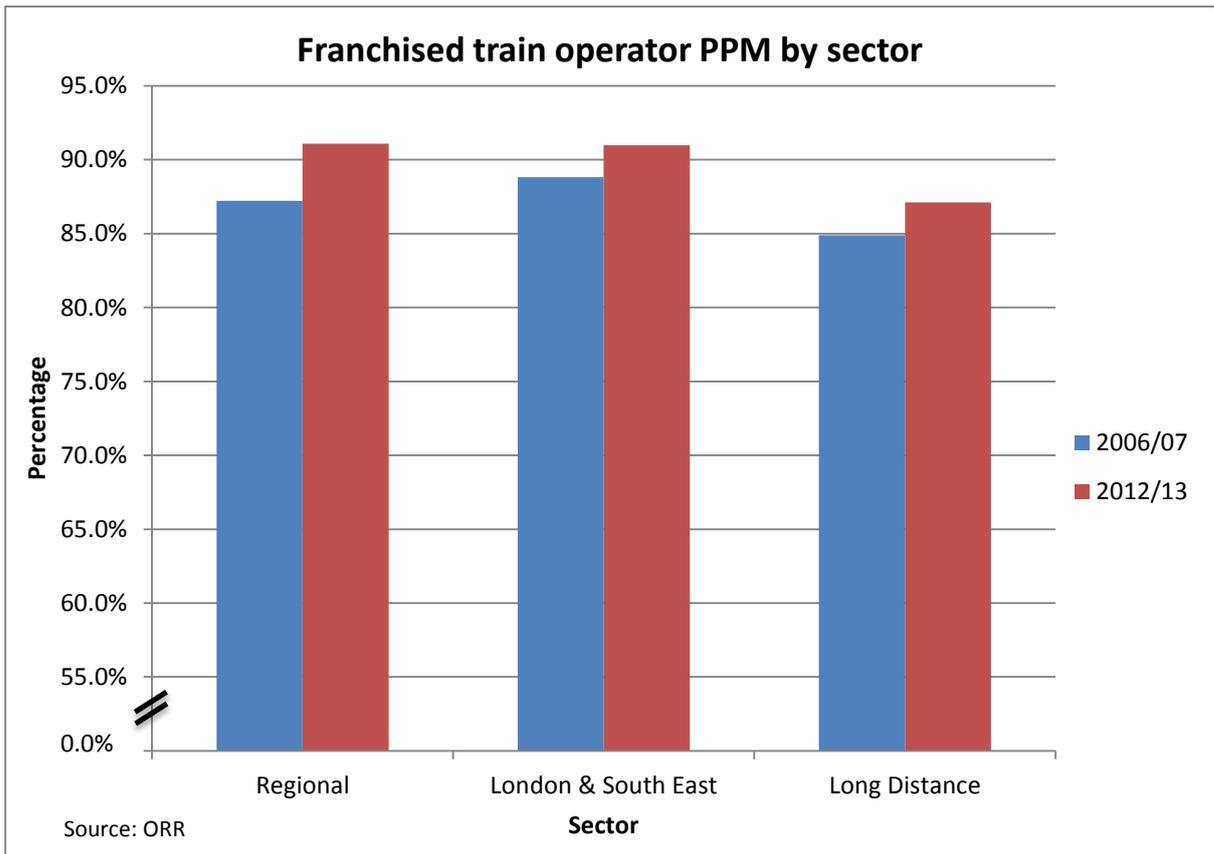
**Table 1, Regulatory punctuality and cancellation targets 2012-13**

	Long distance	London & South East	Regional	Scotland (First Scotrail)
PPM	92.0	93.0	92.0	92.0
CaSL	3.9	2.0	2.3	1.7

2.21 In 2012-13 actual PPM of the long distance sector was 87.1 per cent compared to 91.0 per cent in the London and South East sectors and 91.1 per cent for the Regional sectors. Although performance has improved significantly since 2001, the period after the Hatfield rail crash, punctuality has recently suffered (see Box 2.2). The ORR also reports 'right time' performance, which is the percentage of trains arriving early or within 59 seconds of scheduled arrival time. This is considered in Chapter 5.

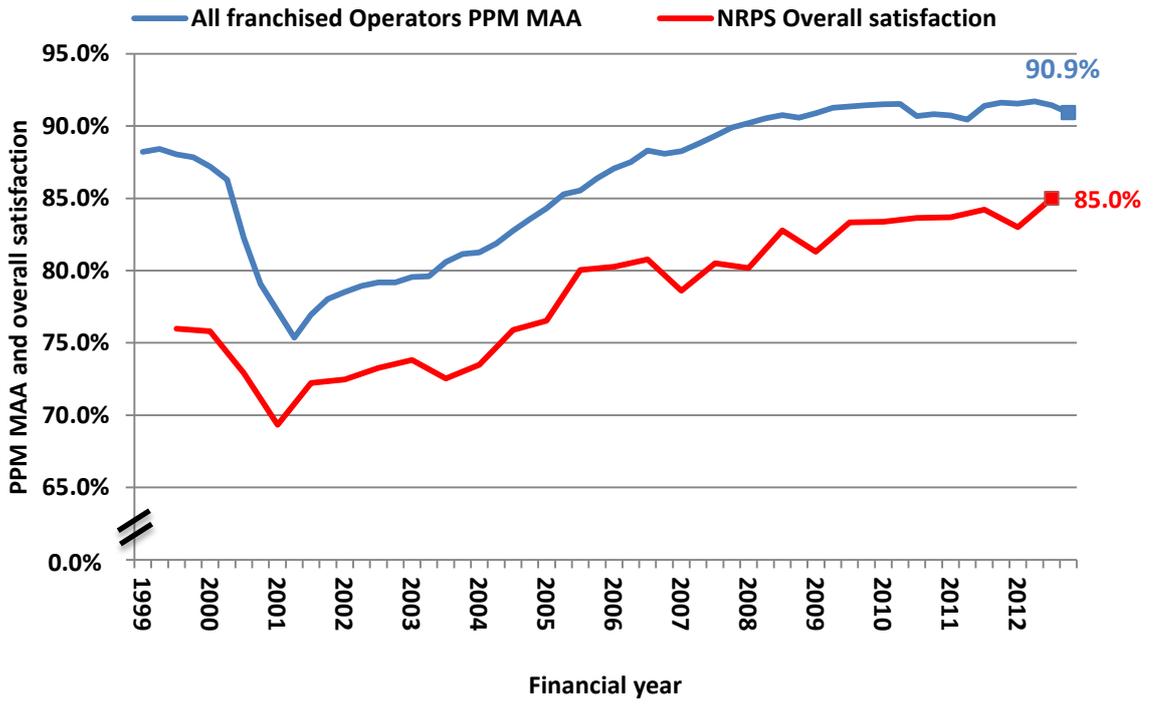
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<sup>6</sup> Except for Heathrow Express services which count as on time if they are within five minutes.



2.22 Overall levels of passenger satisfaction, measured by Passenger Focus' National Rail Passenger Survey, has also improved year on year. Satisfaction in the 2013 Spring survey was 9 per cent higher than in 2000, with the highest satisfaction for leisure travellers, at 89 per cent, and lowest for commuters, at 76 per cent. This measure of satisfaction closely matches better punctuality with rail since 2001 (measured using a moving annual average, MAA).

### Train performance and passenger satisfaction



Source: ORR and Passenger Focus

## **Box 2.2 – Performance Investigations**

Passengers are entitled to get what they have paid for: safe, punctual and reliable train services. A key role for ORR is to ensure the industry continues to deliver a punctual railway. To assess punctuality the rail industry uses a public performance measure (PPM).

The Periodic Review sets the funding for Network Rail and the performance targets it must deliver in return. Failing to meet the performance targets affects passengers directly through more frequent or longer delays. It also means the industry as a whole (and taxpayers) get poor value because the money paid to Network Rail has not delivered the promised quality of service.

Since the middle of 2010-11, the PPM targets for the Long Distance sector have not been met. Punctuality has also declined across the London and South East and Regional sectors over the past year.

This poor performance has led to a number of investigations by ORR, leading to enforcement action. In 2012 an enforcement order imposed by ORR focused on ensuring Network Rail took all reasonably practicable steps to address falling punctuality as a priority. In 2013 ORR also found Network Rail in breach of its licence in the Long Distance and London and South East sectors for 2012-13 performance. The existing Long Distance enforcement order means that if punctuality targets are not met by the end of 2013-14 in this sector, Network Rail may face a significant financial penalty (potentially in excess of £80 million).

We continue to monitor performance in all sectors very closely. This includes assessing Network Rail's quarterly performance and recovery reports and ORR will be assessing whether Network Rail has met its PPM targets for 2013-14 at the end of the year (March 2014). This could lead to formal enforcement investigations and action if Network Rail is found not to have done everything reasonably practicable to meet its regulated targets.

## **Passenger rights**

### **Information for passengers, compensation and complaint handling**

- 2.23 Each franchised train operating company is required to produce a 'passenger's charter'. The charter is available from railway stations or online from each train operator. The charter includes the contact details for raising issues or making complaints. It also explains how tickets can be bought, whether the operator uses 'penalty fares' and how passengers will be kept up to date with important changes to services (for example caused by disruption). The charter will include any specific compensation arrangements for delays or cancellations, which can vary between train operators unless it is part of the 'Delay Repay' scheme (see Box 5.2).

- 2.24 In October 2013, ORR took responsibility for the approval of operators' complaints procedures from the Department for Transport. Complaint handling and compensation are addressed in more detail in chapter 5 of this report.

**Box 2.3 – The National Rail Conditions of Carriage and statutory rights**

The National Rail Conditions of Carriage ('the Conditions') are the terms and conditions on which passengers buy tickets and on which the train service is provided. It forms the contract between passenger and the train company.

The Conditions cover set out a number of obligations on passengers. This includes the requirements to hold a ticket before travel, the restrictions on tickets, and consequences for passengers if you do not abide by the restrictions (such as being liable for a penalty fare).

The Conditions also define when you can get a refund for unused tickets, for example because of cancellations, and the use, replacement and refunds for season tickets. A minimum standard of compensation for delays is included, if more generous schemes like Delay Repay are not available.

The Conditions are currently being reviewed by ATOC, with a revised draft expected by April 2014.

In addition, passengers also benefit from the statutory rights that apply whenever you purchase a service from a company. The Sales of Goods and Services Act 1982 require services to be provided with "reasonable care and skill". Failing to do so is a breach of contract. This means individuals may seek redress from a firm if they consider services have not been supplied with reasonable care and skill.

**Disabled passengers**

- 2.25 Railways are an essential means of public transport and the government is committed to an accessible railway. The ORR requires all train operators and Network Rail where it operates stations to develop and comply with a Disabled People's Protection Policy (DPPP). Until recently these policies were approved by the Secretary of State, but from October 2013 this responsibility transferred to the ORR. The DPPP requires train operators to ensure assistance is available to disabled passengers and they have the resources and management expertise to deliver this assistance. The advice for passengers is included in a leaflet 'Making rail accessible: helping older and disabled passengers'. Specific requirements include:
- (a) explaining how to use Passenger Assist, where disabled passengers can book ahead for travel assistance to board or disembark from a train;
  - (b) the additional information about station access and staffing to help manage the journey, this includes providing an alternative transport to take disabled

passengers to the nearest or most convenient accessible station from where they can continue their journey;

- (c) promptly updating information on planned engineering, rail replacement or work on stations that may affect access or use of rail by disabled persons; and
- (d) advice for helping disabled passengers during disruption, for example where a short-notice change of platform is announced.

#### **Box 2.4 - Passenger Assist**

Passenger Assist, previously known as the Assisted Passenger Reservation System (APRS), is aimed at ensuring those travelling by rail that may need assistance will receive it. Passengers are recommended to book assistance 24 hours ahead (48 hours if international rail travellers), but this is not required. The service, in place with all train operators, allows passengers needing assistance to receive help purchasing tickets, accessing stations and boarding trains. The service provides for seat reservations, including dedicated wheelchair spaces if needed. The service requires train operators to coordinate assistance, even where two or more operators may be responsible for services to a final destination.

Sample sizes for research into the use and effectiveness of Passenger Assist tend to be smaller, as research is targeted at disabled passengers only.

## 3. Planning a journey

### Summary

- A significant minority (one-quarter) of leisure/ business passengers compare rail with different modes of transport when planning a journey. About a fifth of commuters also compare rail to alternative modes. The car is the main alternative considered.
- The key factor for leisure/ business passengers for choosing rail travel is the cost. For commuters, the reliability of journey time is the most important factor but this is the most difficult factor to compare between modes of transport.
- Online sources of information are widely used and trusted to plan journeys. Some respondents to our research considered that price comparison-style websites or other ways of bringing travel information together in one place, including different rail options, would help comparisons between modes and for rail journeys.
- The internet is also the principal channel used to buy tickets before the day of travel, but with commuters continuing to use ticket offices to renew season tickets.
- People that do not use the internet do not feel unduly disadvantaged when planning journeys but do consider they may be losing out by paying higher fares. Other groups of passengers, for example people with visual impairments, may have difficulty using some websites or apps that have not been suitably adapted.
- Planned engineering works can cause serious disruption for passengers. They are, however, essential to maintain and improve the rail network. The rail industry has improved how it communicates to passengers before and during planned works, in particular so passengers are aware of changes to services and alternatives routes or use of rail replacement bus services. However, passengers are not sufficiently made aware of the longer term benefits from the engineering work undertaken.
- Advance tickets appear to be well established with some groups of passengers, principally leisure/ business passengers travelling long distance, with a growing understanding that these can offer lower prices at the cost of less flexibility. This suggests an improvement to the situation found in ORR's 2011 research into ticket complexity. Some passengers may not always be taking advantage of better deals, for example those taking day trips may not consider their ticket options carefully and commuters have limited flexibility with the current fare structure.

## Summary

- Similarly, ticket restrictions appear to be much clearer to passengers buying tickets before the day of travel, especially if purchased online. However, even with online sales channels, over 20 per cent of people are unsure whether ticket restrictions were brought to their attention during the sales process. Passengers may also be overconfident that they are aware of and understand ticket restrictions. Discussions with focus groups revealed uncertainty with ticket types and restrictions, albeit that people recognise that cheaper tickets are available because of the more complex fare structure.
- The industry and ORR are taking steps to address many of the issues identified in this chapter. This includes i) measures to allow wider access to rail industry information for third parties, ii) monitoring of the TOC code of practice for information to passengers during disruption, and iii) industry initiatives to improve information about ticket restrictions. The ORR will be working with industry to introduce a ticket retail code of practice in 2014, to ensure ticket choices and restrictions are made clear at the point of sale.

## Structure of this chapter

3.1 This chapter is structured as follows:

- (a) focus of this chapter, describes the stages of the passenger transaction considered in this chapter;
- (b) why this is important, describes why these stages are important to passengers' experience and a successful railway;
- (c) comparing modes of transport, presents research on how passengers compare different journey options;
- (d) planning rail journeys, presents research on passengers' information needs to plan rail journeys and buy tickets;
- (e) themes and issues, outlining the key points arising from the evidence presented; and
- (f) actions by industry or ORR that address any issues identified.

## Focus of this chapter

3.2 Railways can offer passengers an effective alternative to other travel choices or modes. To choose effectively passengers must be able to compare costs, length of journey, routes and other factors between modes. This chapter focuses on passengers' experience of:

- (a) comparing modes of transport when planning a journey;

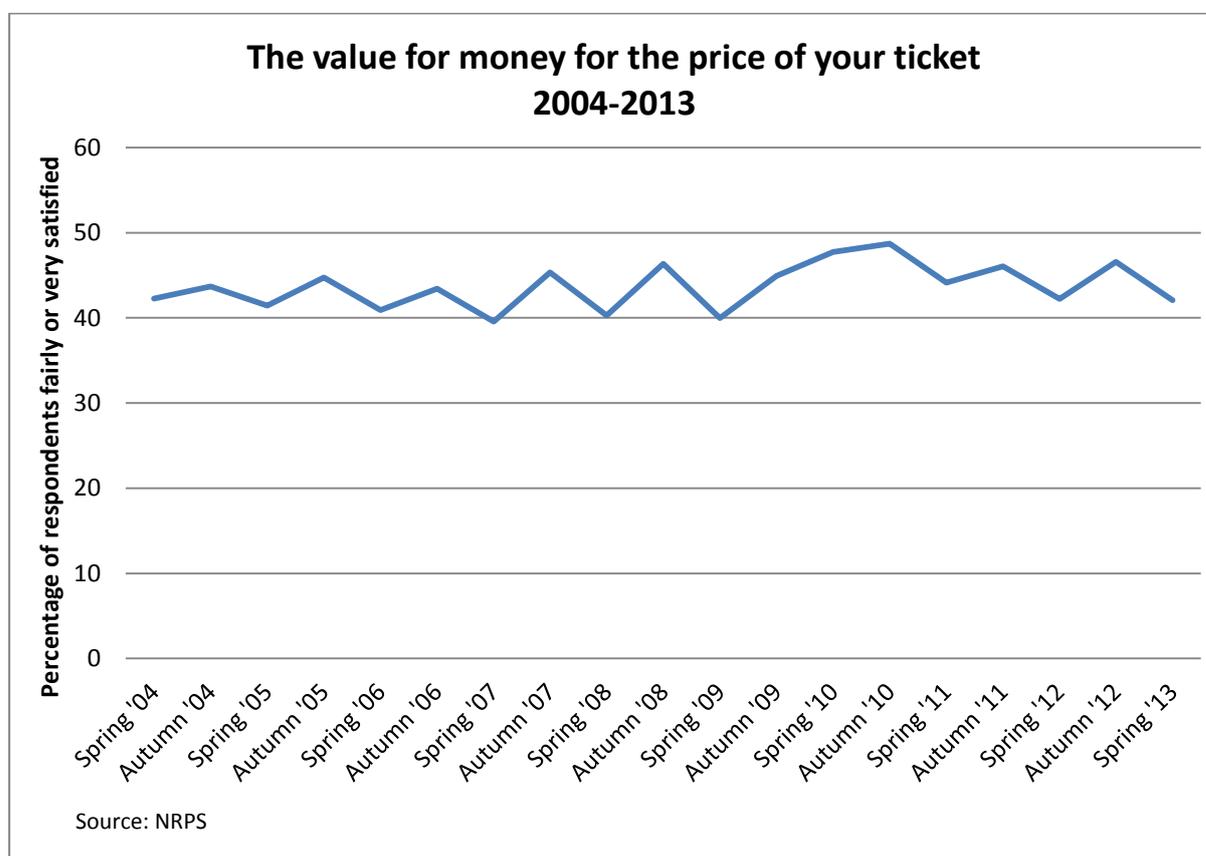
- (b) using information and advice to plan a rail journey; and
- (c) buying a rail ticket before the day of travel (i.e. in advance)

3.3 We have considered how effectively people can make these choices and looked for differences between respondents' views. In particular, we have explored the extent to which passengers rely on digital devices and services to compare options effectively. This includes a consideration of whether those without easy access to such devices are disadvantaged.

3.4 Where relevant we have considered evidence from three sources: published research; the National Rail Passenger Survey; and our new research that includes a quantitative survey and qualitative research (see paragraph 2.9).

## Why this is important

3.5 Not all passengers need to plan their journey each time they travel. However, even for regular commuters, there will be times when it would be beneficial to compare and appraise their choices. This would allow passengers to consider whether they are achieving good value, in terms of travel convenience, duration, price or other factors that matter to them. For the railways it is important that they offer a compelling choice between modes of transport for passengers, and make obtaining best value easy. This remains a challenge for railways, for example only 42 per cent of respondents to the NRPS were fairly or very satisfied with value for money, and this has not changed significantly over time.



## The principles important to a good experience

- 3.6 Three principles underpin a good experience:
- (a) access – information and advice is easily available to any passenger without difficulty;
  - (b) quality – information and advice can be relied upon, it is accurate; and
  - (c) choice – information enables easy comparison of travel options and relevant restrictions
- 3.7 These principles have steered our new research to inform us how successfully different types of passengers are able to plan and compare journey options.

## Comparing modes of transport

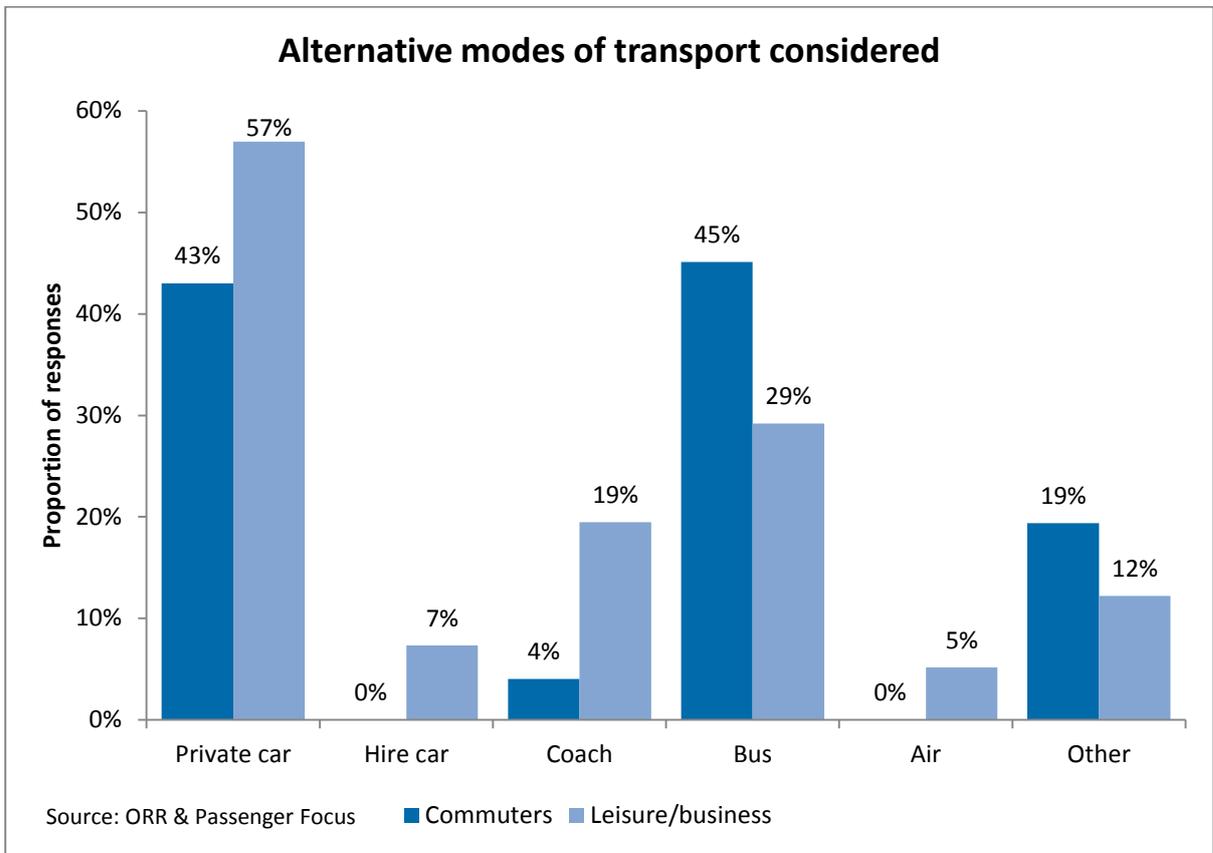
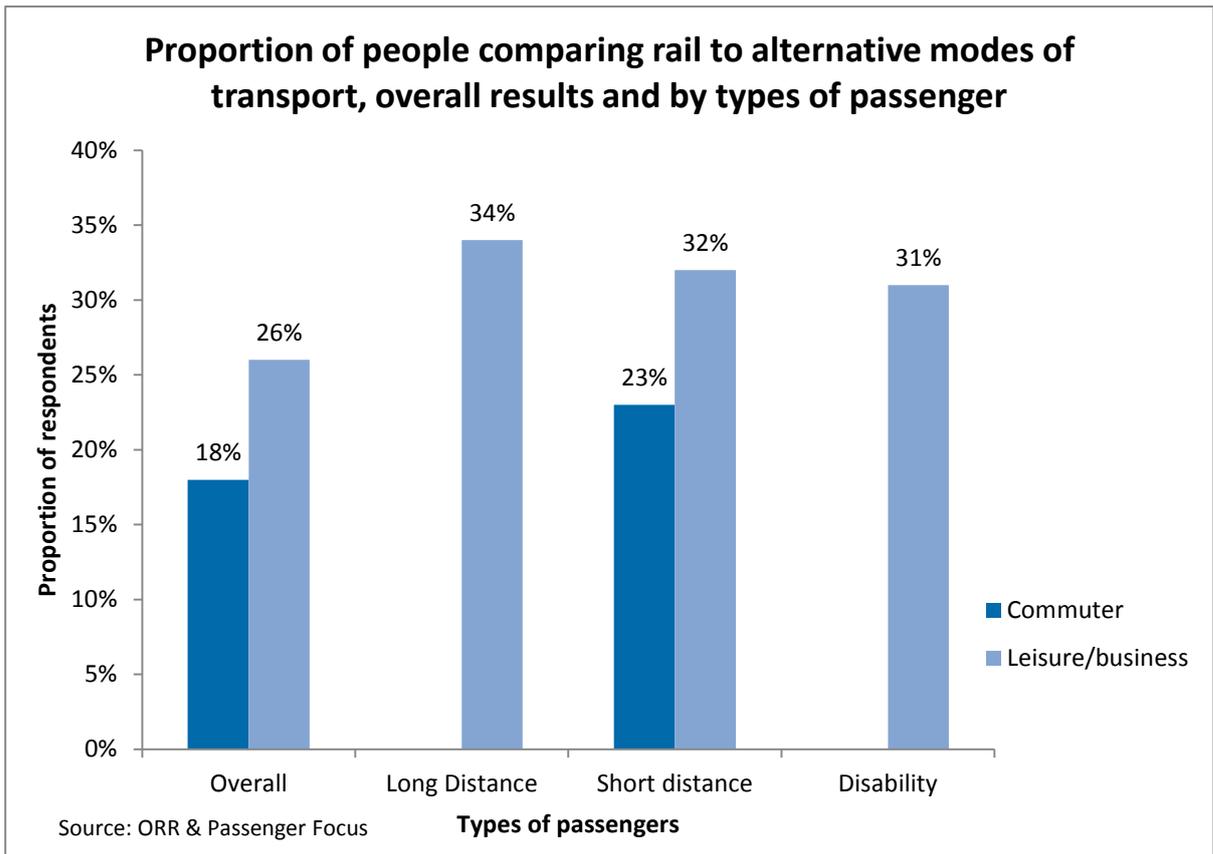
- 3.8 This section considers how passengers actively compare different journey options. The options could include the date or time of travel, mode of transport, routes, and prices or other pros and cons to finally settle on a journey choice. When we consider journey planning, we mean making a comparison between alternative travel options.
- 3.9 There is limited previous published research to draw upon. The National Travel Survey show that relatively few journeys are made by rail in comparison with road, and on average only 7 per cent of people travel at least once every week by rail (see paragraph 2.17). For those that do use rail, over 50 per cent are commuting to work, and so will be making a regular, habitual journey with which they are familiar. People who travel less frequently may need to review and consider the mode of transport that meets their needs for any specific journey

## New research

- 3.10 Our new research has considered how people compare travel options and the choices between different modes of transport (train, coach, car etc.). The quantitative survey results are presented in the graphs below. The qualitative results (from the focus groups and interviews) are summarised with quotations to illustrate points raised by respondents (see paragraph 2.10 and 2.11).

## Comparing modes

- 3.11 About one quarter of respondents making leisure/ business trips compared rail with other modes of travel. Just under one fifth of commuters compared the train with different modes. A higher proportion of people, about one third, compare modes if taking a long distance journey or if they are disabled. Private cars or buses are the main alternative modes considered. Only in 5 per cent of cases was air travel considered as an alternative to rail. The majority of rail passengers do not compare options, stating that they were either already familiar with the journey, so did not need to plan, or considered they knew enough about the journey already.



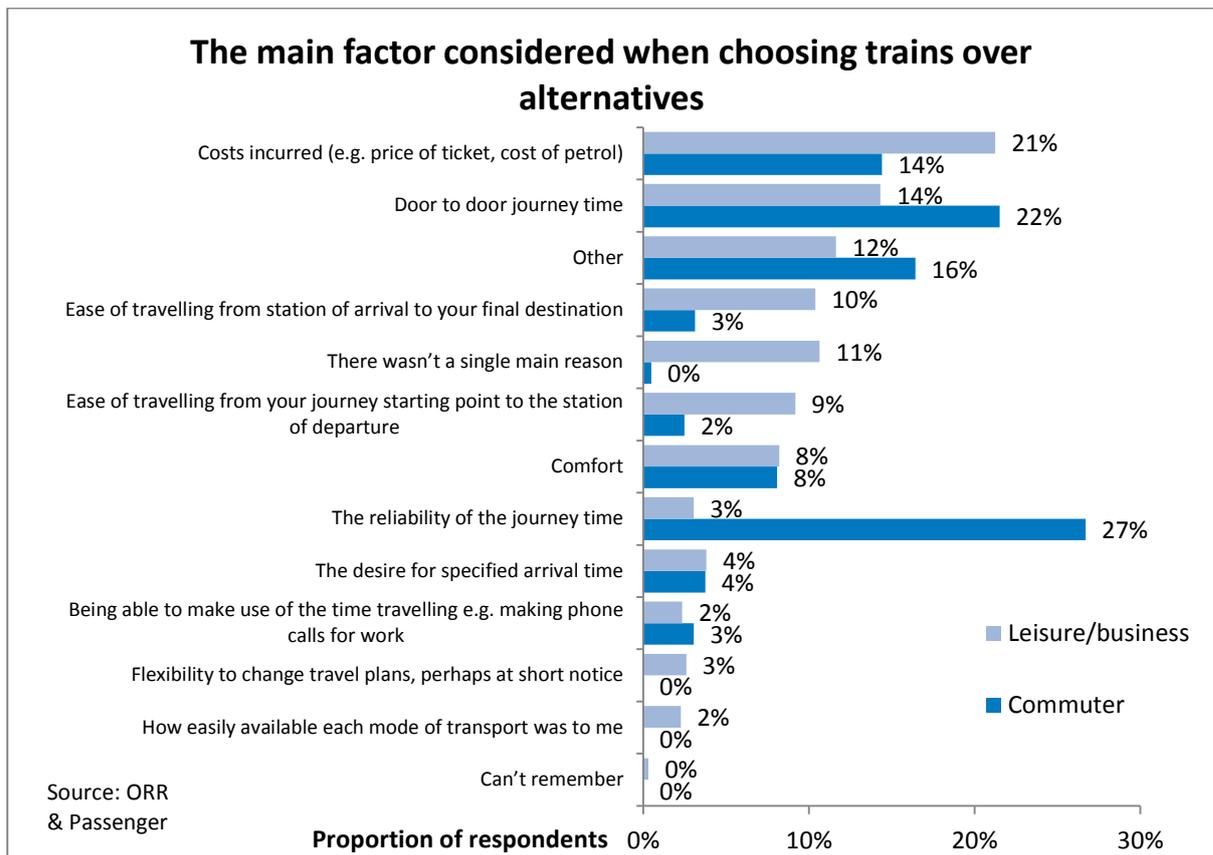
3.12 Our qualitative research found that journey planning concentrated on the whole door-to-door experience. Participants tended to have a preferred mode of travel, a starting

point from which they would assess the door-to-door options. But, uncertainty with rural services or connections to public transport may lead people to rely on cars.

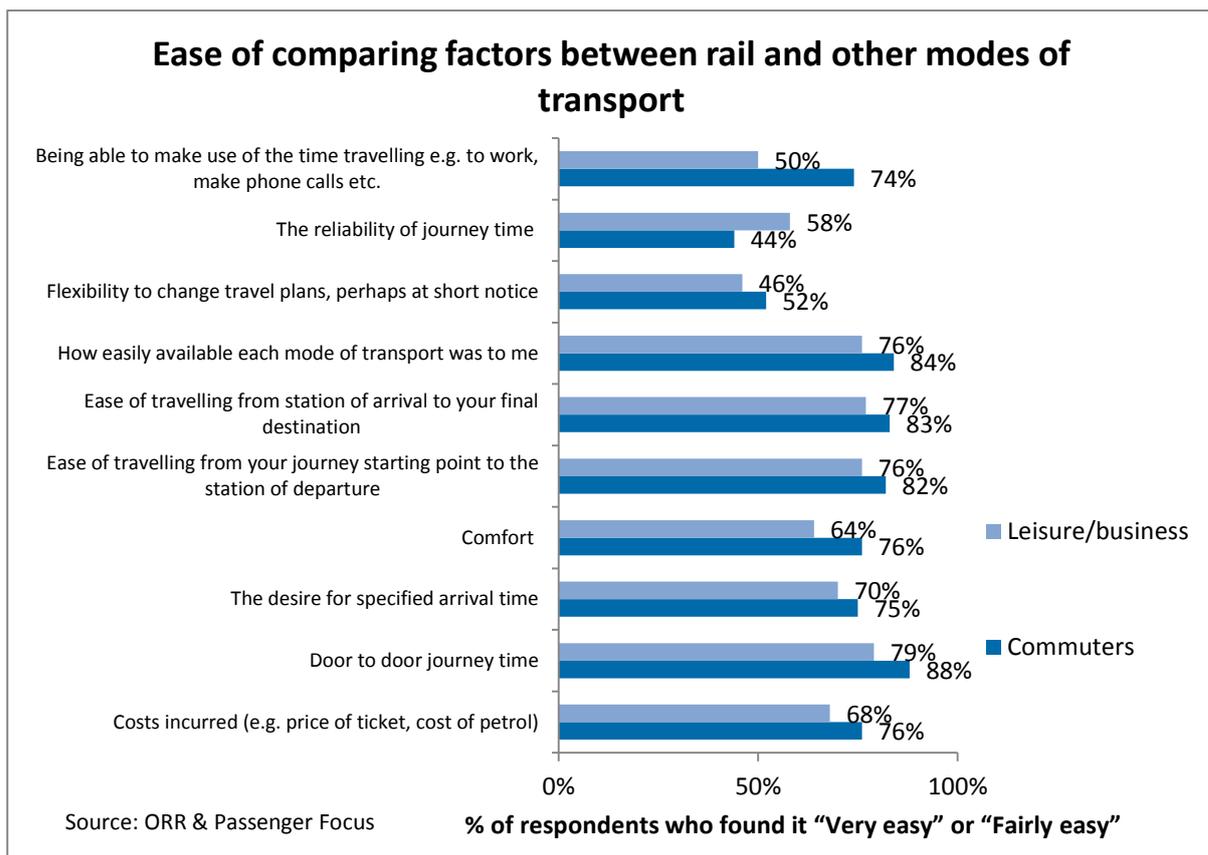
*“It depends on the start and end points of the journey because public transport may not be very good in the middle of Shropshire and you may need access to a car during the course of your time there” [Frequent, London]*

*“I always think about the door to door journey. When I go to Birmingham city centre I get a train but if I stay with my friend I drive because he lives a bus ride away. That’s definitely a major factor” [Frequent, London]*

3.13 Our quantitative survey found that commuters and leisure/ business travellers compare a wide range of factors between rail travel and its alternatives. However, commuters choosing trains are mainly focused on reliability and punctuality. Leisure/ business travellers mainly consider the cost of alternatives, along with overall journey time.



3.14 Notably, the reliability of journey time is amongst the most difficult to compare between modes. For commuters 44 per cent found it ‘very’ or ‘fairly easy’ to compare reliability of the journey time of other modes with rail, which was the lowest response for any of the factors considered.



3.15 Our qualitative research found a heavy reliance on online sources of information to make comparisons. There was a high level of trust in this source, but some recognition that you had to ask the right questions to get accurate results. There was also some concern about the lack of price comparison / aggregator websites to pull the relevant information together in one place, to make comparison of modes or alternatives within a mode easier.

## Planning rail journeys: Information, advice and purchasing tickets

3.16 This section focuses upon the information needs of passengers when choosing between different rail options. It is organised as follows:

- (a) previous research – this section summarises key findings from previous published research into information for passengers when planning journey, being informed of planned engineering works and information about rail tickets if buying before the day of travel;
- (b) National Rail Passenger Survey – presents views on booking travel assistance, passenger habits when buying tickets and satisfaction scores for ticket information; and

- (c) new research – that includes quantitative survey results and qualitative research looking at how passengers compare options for rail journeys and habits and outcomes when buying tickets before the day of travel.

## Previous research

### Passenger information when planning a rail journey

- 3.17 Joint research by ORR and Passenger Focus in 2010 aimed to understand passengers' information needs on train performance and the travel choices people make.<sup>7</sup> It considered more than just day to day travel, exploring how travel options played a role in wider life-decisions. The study looked at how people use information to compare performance of other services, for example school or police performance. The research found that rail information was considered too generic, without specific route or journey level information and this broad-brush information was of limited use to empower individuals. Overall, respondents felt unengaged and disempowered with rail services and information on rail performance. The prospect of relevant information, however, was considered to strengthen accountability and potentially support important life-decisions, such as changing jobs and planning travel needs. To be useful, this information had to be specific to an individual's journey.
- 3.18 Passenger Focus has looked at the experience of disabled passengers using the Passenger Assist service.<sup>8</sup> This research was carried out by mystery shoppers between May and July 2010, looking at 26 train operators (including open access operators), a selection of station types operated by each train company and all Network Rail stations. In brief, the research found:
- (a) passengers could not book assistance at stations, limited to booking by telephone or online;
  - (b) when booking assistance online, about half of the mystery shoppers had difficulty finding the relevant webpage or email address;
  - (c) most booked using the telephone, with advice provided on travel arrangements such as when to arrive at a station, meeting points or available assistance varying from case to case, and not always consistent with the type of disability (for example, wheel-chair users were less often advised to arrive early than mystery shoppers with other impairments); and
  - (d) information about station and train access and facilities was broadly accurate. However dissatisfaction arose when booking assistance if people were not asked about their specific needs if staff did not have sufficient knowledge or if incorrect information was provided (e.g. being told the station was accessible to them when it was not).

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<sup>7</sup> *Putting rail information in the public domain*, May 2011, ORR and Passenger Focus.

<sup>8</sup> Pages 8 – 15, *Assisted Passenger Reservation System*, January 2011, Passenger Focus.

- 3.19 Overall, information provided in advance meant that 84 per cent of mystery shoppers using Passenger Assist felt confident their needs would be met during their journey.
- 3.20 This confidence was not reflected in the concerns expressed with the availability of information to disabled travellers, necessary to plan journeys and select the best fares, raised in evidence to the Transport Select Committee.<sup>9</sup> The Committee was concerned that “repeated experiences with inadequate information may make discounting travelling by public transport habitual, with adverse consequences for a disabled person’s social life and wellbeing.”

### **Box 3.1 – Planning and traveling without using the internet**

Four interviews were conducted with people that do not have access to, or make regular use of, the internet when planning rail journeys or buying tickets. Although the very small number of interviews is not representative, it offered some insights into how the experiences of people without internet access may differ from the majority of passengers.

- Respondents recognised obvious disadvantages with telephone or face-to-face channels when seeking information or buying tickets. For example, published information may not be updated as frequently as online sources and it can be time-consuming to use other channels.
- Despite this, respondents were used to coping with this and did not consider themselves at a disadvantage. There was also greater confidence in the advice offered directly by staff, compensating for not making online searches or comparison.
- Respondents perceived that they may also be paying too much for their tickets, aware that ‘walk-up’ fares are often more expensive. This was felt to be unfair.
- Respondents may also not be aware of the wider-range of choices available to passengers buying online. This may be addressed by a greater reliance on ticket-office staff.

### **Information about planned engineering works**

- 3.21 A critical time for information is during major engineering works. Planned engineering works can have a significant impact on passengers’ travel plans. The effectiveness of communications around planned engineering can directly affect the level of disruption experienced by passengers.

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<sup>9</sup> *Access to transport for disabled people, fifth report of session 2013-14, Volume I, HC 116, September 2013*

- 3.22 Research for Passenger Focus found that although recognising the necessity of planned engineering works, passengers wanted:<sup>10</sup>
- (a) information that empowers them to plan their journey to minimise the impact of engineering works;
  - (b) planned alternatives to scheduled services that minimise the use of buses (rail replacement); and
  - (c) work to be timed to be least disruptive where possible, mainly at night and during summer rather than over Christmas or Easter.
- 3.23 Disabled people, in addition to sharing the same general views, had particular needs to ensure access to stations and the alternative modes of transport provided, relying on appropriate communication in advance and on the day of alternative routes.

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<sup>10</sup> See *Rail passengers' experiences and priorities during engineering works*, September 2013, Passenger Focus.

### **Box 3.2 – Improving railway stations**

Rail passenger numbers have grown significantly in recent years and are predicated to continue growing. To meet this demand over £12 billion will be spent enhancing the capacity of the network in the next five years. Improving railway stations is a key part of this investment. Work has begun at Reading station, London Bridge, Birmingham New Street with many other stations seeing smaller improvements, for example installing lifts.

Any station work can result in serious disruption for passengers: changes to station layout, full or partial closure, changes to timetables or replacement with alternative rail or bus routes. Effective communications with passengers, well in advance and during this work, is vital to minimise disruption.

From 2010 a six year programme of work at Reading station was begun. In the lead up to this work there was extensive communication to passengers about how their journeys would be affected. Passenger Focus undertook a detailed study of passengers' experience during the initial phase of work (over Christmas 2010). It found:

- > Wide awareness of the works by passengers before they arrived at the station (76%), with those travelling more frequently most aware of the planned works. Passengers on routes with replacement buses were more aware of the upcoming engineering works than those on routes served by diverted trains
- > The way that passengers found out about the works was different between frequent rail passengers and those travelling less frequently. Frequent travellers relied mostly on notices at the station. Less frequent travellers relied on the Internet, but would have also preferred greater pro-active communication from the train operator
- > Overall satisfaction with how engineering works at Reading Station was handled scored 63 per cent, with 81 per cent of passengers using rail replacement satisfied. Rail replacement passengers were also the most likely to know in advance that the works were occurring, suggesting that good communication made a real difference to passenger experience
- > However, over two fifths of passengers did not know what improvements they should expect to see as a result of the engineering works, even though this had been communicated before the works began. Ongoing communication of benefits from engineering works is important to reach those passengers travelling less frequently during the disruption

## Information about rail fares

3.24 The complexity of rail fares has been the focus of past enquiries, which found that the main issues affecting passengers were:<sup>11</sup>

- (a) the large number of available tickets;
- (b) the complexity and poor transparency of ticket restrictions; and
- (c) a fare structure that could appear irrational or counter-intuitive.

3.25 In 2007 the government announced a simplification of fares to the current Anytime, Off-Peak and Advance fares, which was implemented in 2008 by train operators.<sup>12</sup> Despite this simplification, research by Passenger Focus and Which? reported on-going concerns.<sup>13</sup> Research in 2011 for ORR identified a number of areas where passengers had difficulty fully understanding the products and choices available.<sup>14</sup> For those booking Advance tickets, we found:

- (a) some passengers were unaware of potential price savings if booking in advance, for example around 25 per cent of on-train interviewees did not know tickets were likely to be cheaper if bought in advance; and
- (b) a significant proportion of passengers were unaware of important restrictions to the use of their Advance tickets, for example 70 per cent were unaware that you can only travel on the specified train on an Advance ticket, 37 per cent did not realise that if they missed their train their ticket would not be honoured on another service and 64 per cent did not know they could only get off the train at the station named on the ticket.

3.26 More recently, London TravelWatch found a distinction in how leisure travellers plan, who actively plan ahead to take advantage of cheaper Advance fares, and commuters that feel unable to benefit from planning.<sup>15</sup> However, this distinction did not apply to day trips into London where even leisure travellers tended to rely on the most familiar tickets, Oyster cards and Travelcards, with little active consideration of prices or the advantages of Railcards. For commuters, London TravelWatch found some evidence that the difficult economic conditions were prompting commuters to think carefully about the affordability of season tickets.

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<sup>11</sup> The May 2006 Transport Select Committee criticised the complexity of rail fares, finding that passengers were faced with up to a dozen different fares for a particular journey. (Transport Committee, Sixth report of Session 2005–06, *How fair are the fares? Train fares and ticketing*, HC700, paras 31 and 34).

<sup>12</sup> *Delivering a Sustainable Railway* - White Paper CM 7176, July 2007.

<sup>13</sup> For example, Which? reported a significant proportion of passengers may be missing discounted Advance fares (<http://www.which.co.uk/news/2011/05/rail-passengers-missing-out-on-ticket-discounts-252644/>)

<sup>14</sup> See *Fares and ticketing – information and complexity*, June 2012, ORR (<http://www.rail-reg.gov.uk/upload/pdf/ticket-complexity-report-june-2012.pdf>).

<sup>15</sup> *Value for money on London's transport services: what consumers think*, August 2013, London TravelWatch.

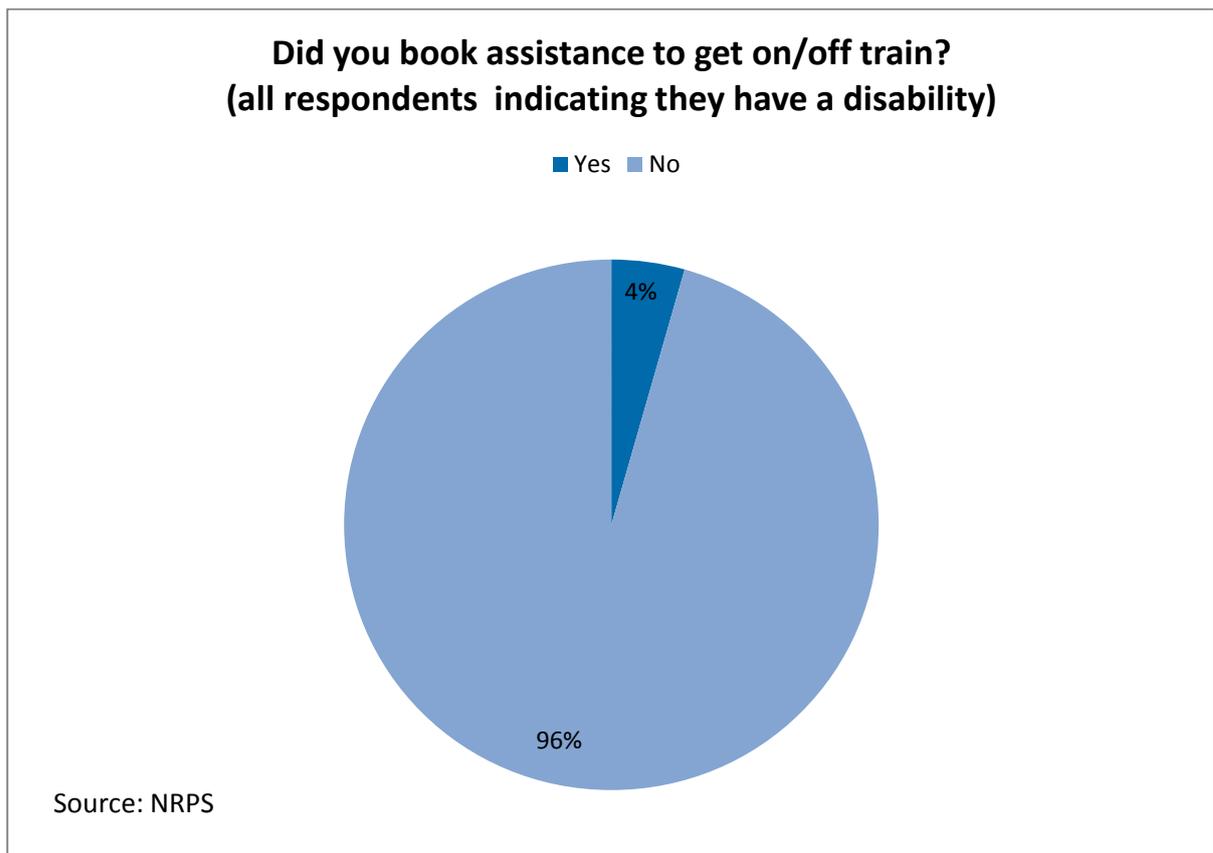
### Box 3.3 – More flexible season tickets

In October 2013, the government published *Rail Fares and Ticketing: Next Steps*. This outlined a trial of more flexible ticket types, building on ‘smart’ technology to allow a greater range of tickets to suit people who travel regularly by train, but are not traditional 9 to 5 commuters. Specific details of the trial are yet to be decided as a competition will be run in due course to select the train operator to undertake the trial. However, it is intended that the trial considers different approaches to flexibility, which could be a further discount on season tickets for travelling less than 5 days a week, or avoiding the busiest trains for example

## National Rail Passenger Survey

### Use of assisted travel

3.27 Disabled passengers may book assistance using Passenger Assist (see paragraph 2.25). ATOC estimate that about 1 per cent of disabled travellers use Passenger Assist. Data from the NRPS finds a slightly higher percentage, at 4 per cent.

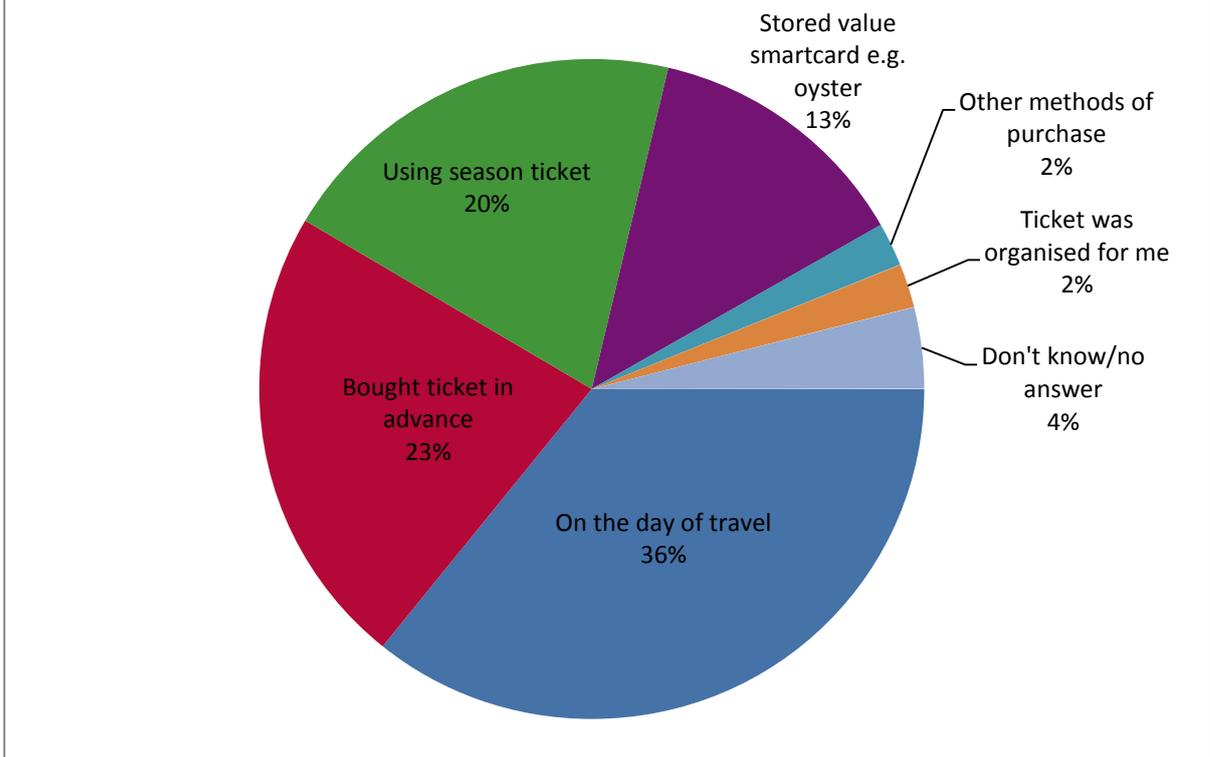


### Overall ticket buying trends

3.28 Responses to the NRPS give a broad indication of ticket buying habits. The NRPS shows that 23 per cent of people buy their tickets before the day of travel with a further 20 per cent regularly using season tickets, bought weekly, monthly or annually.

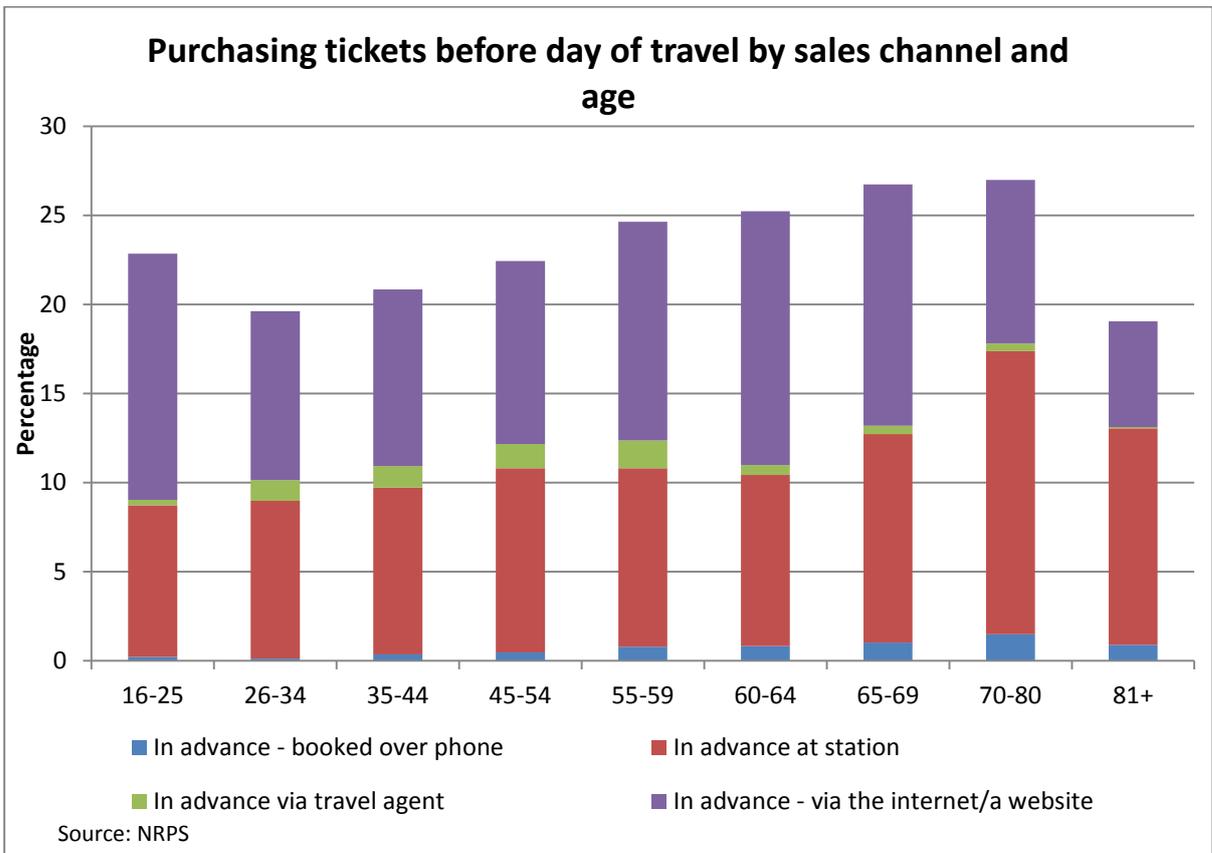
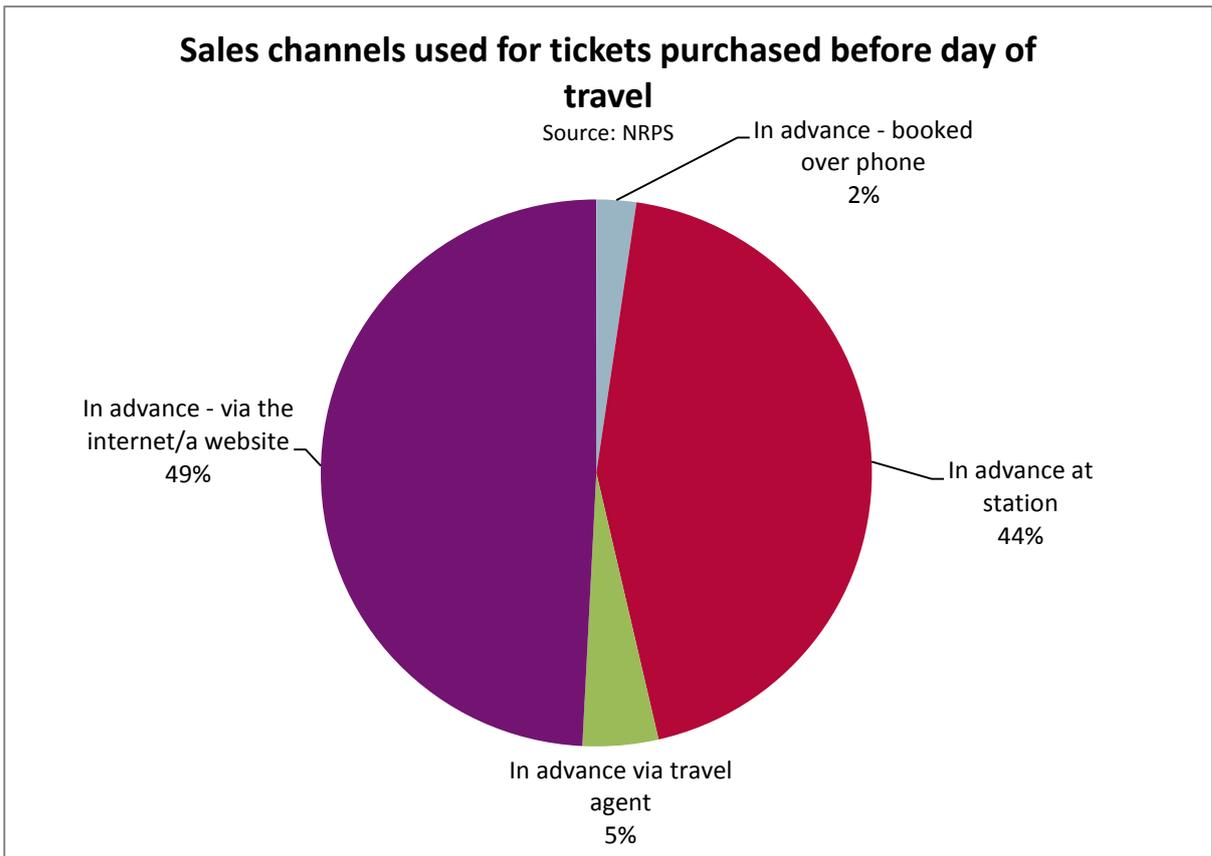
## How passengers purchase tickets (all respondents)

Source: NRPS, 2012-13



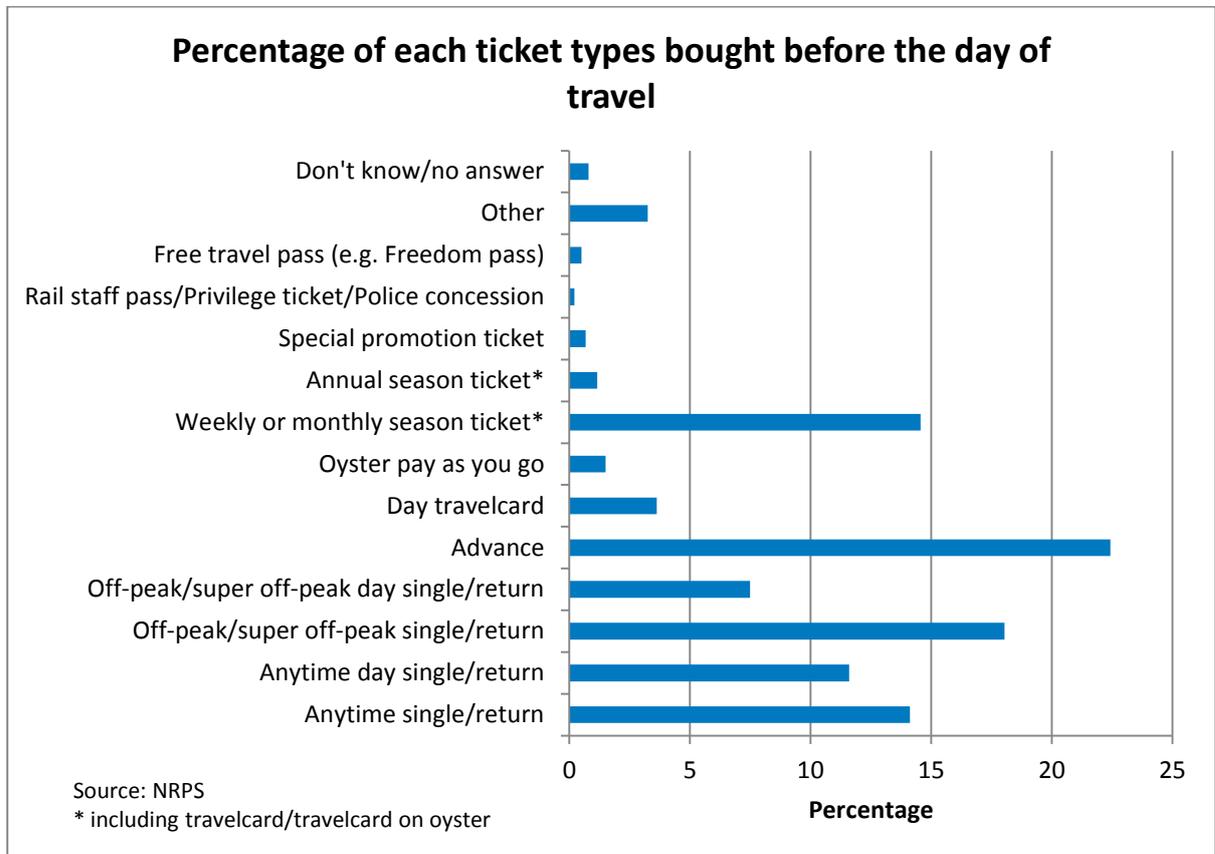
### Sales channels and ticket types

3.29 Nearly 50 per cent of passengers that buy a ticket before the day of travel use a website. However, sales from station ticket offices remain an important channel. The NRPS allows a breakdown by age groups and sales channels. Here we find that older people tend to purchase a greater proportion of tickets in advance. Both the internet and ticket office are important sales channels for all age groups, although those aged 70 or over are more reliant on ticket offices.

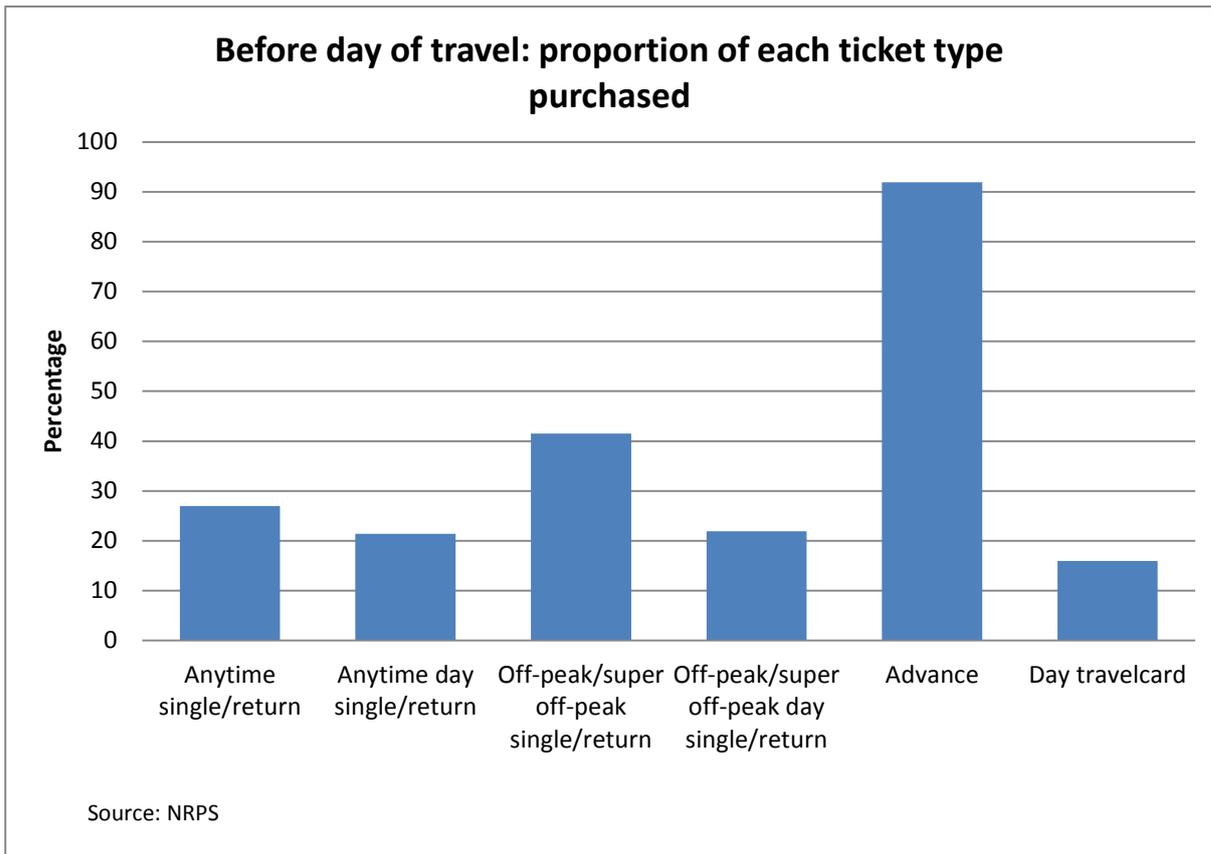


3.30 A range of tickets are sold before the day of travel, including weekly or monthly season tickets and Off-peak and Anytime tickets. As expected, Advance tickets

account for the greatest share of ticket types sold before the day of travel (at 22 per cent), and nearly all Advance tickets are sold before the day of travel (92 per cent of all Advance tickets).<sup>16</sup>

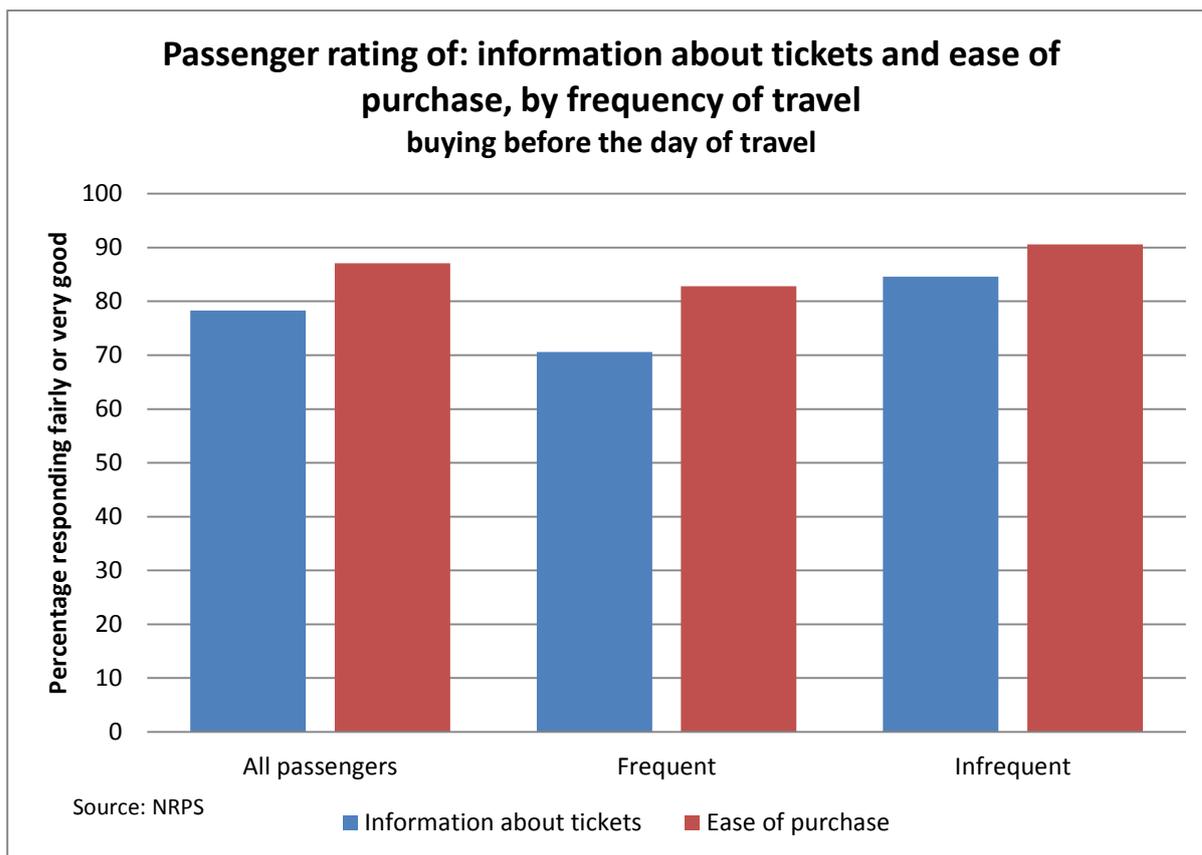


<sup>16</sup> The information on tickets purchased from the NRPS is presented showing two things. First, the proportion of all ticket types purchased (before and on the day of travel). Second, for any specific type of ticket, the proportion of total tickets of that type purchased either before the day of travel or on the day of travel by respondents to the NRPS. The first piece of information shows the overall popularity of different ticket types, compared to each other, and the second shows when people tend to buy a specific type of ticket. This gives us an insight into peoples' ticket buying habits as revealed by the NRPS.



### Information about tickets and use of sales channels

3.31 The NRPS provides a view of how highly passengers rate the provision of information about tickets and the ease of purchase. Overall, 78 per cent of passengers' rate information fairly or very good, with 87 per cent considering ease of purchase is also good. However, we find that those that use railways frequently are less satisfied.



**Box 3.4 – Satisfaction of frequent rail users**

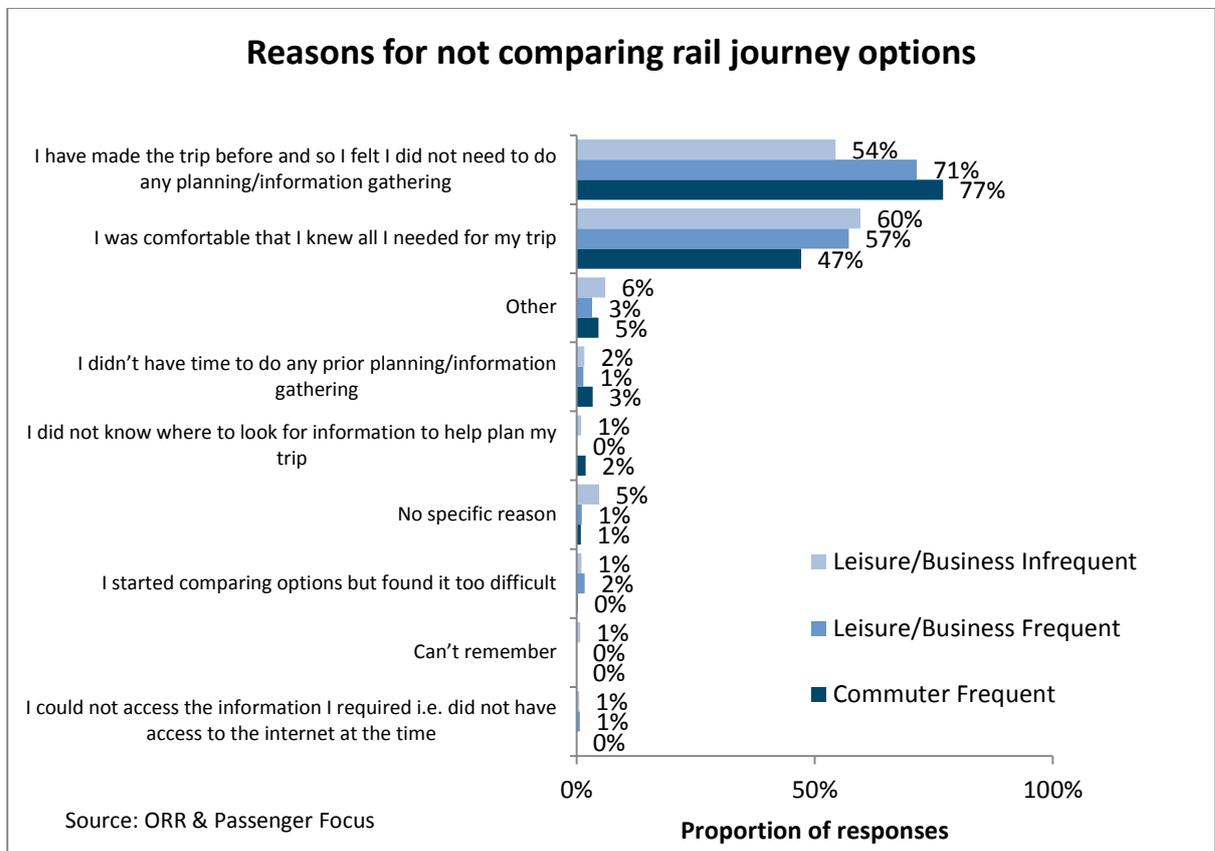
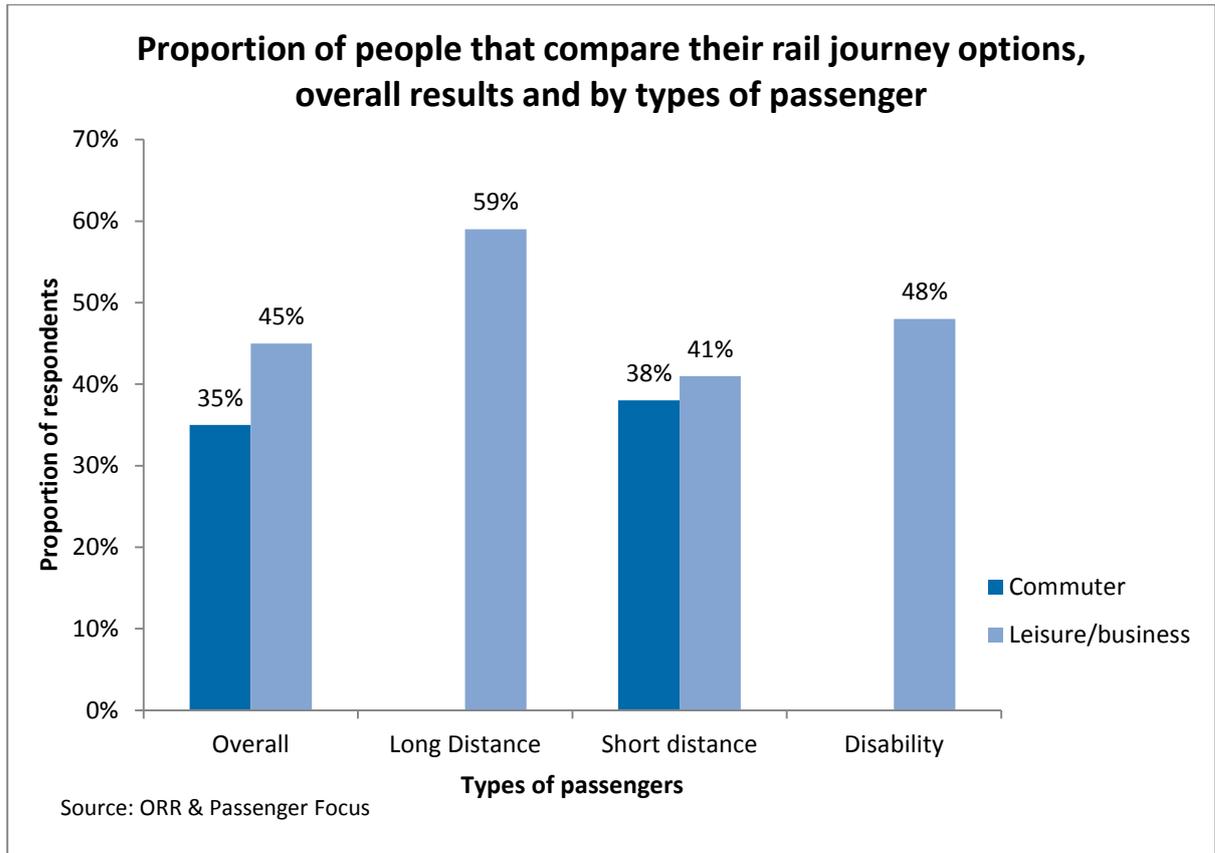
We have found throughout the analysis of the NRPS that those using railways more frequently are amongst the least satisfied across a wide range of issues. The NRPS does not provide an explanation for this. However, frequent users are also likely to be commuters, who similarly rate railways lower than leisure or business users across most aspects of satisfaction. Other evidence, for example research into value for money by London TravelWatch, suggests that commuters see rail services as a ‘distress’ purchase and are more sensitive to performance given their reliance on rail. In addition, frequent users have a greater chance of encountering problems or issues, which affects their judgement of rail.

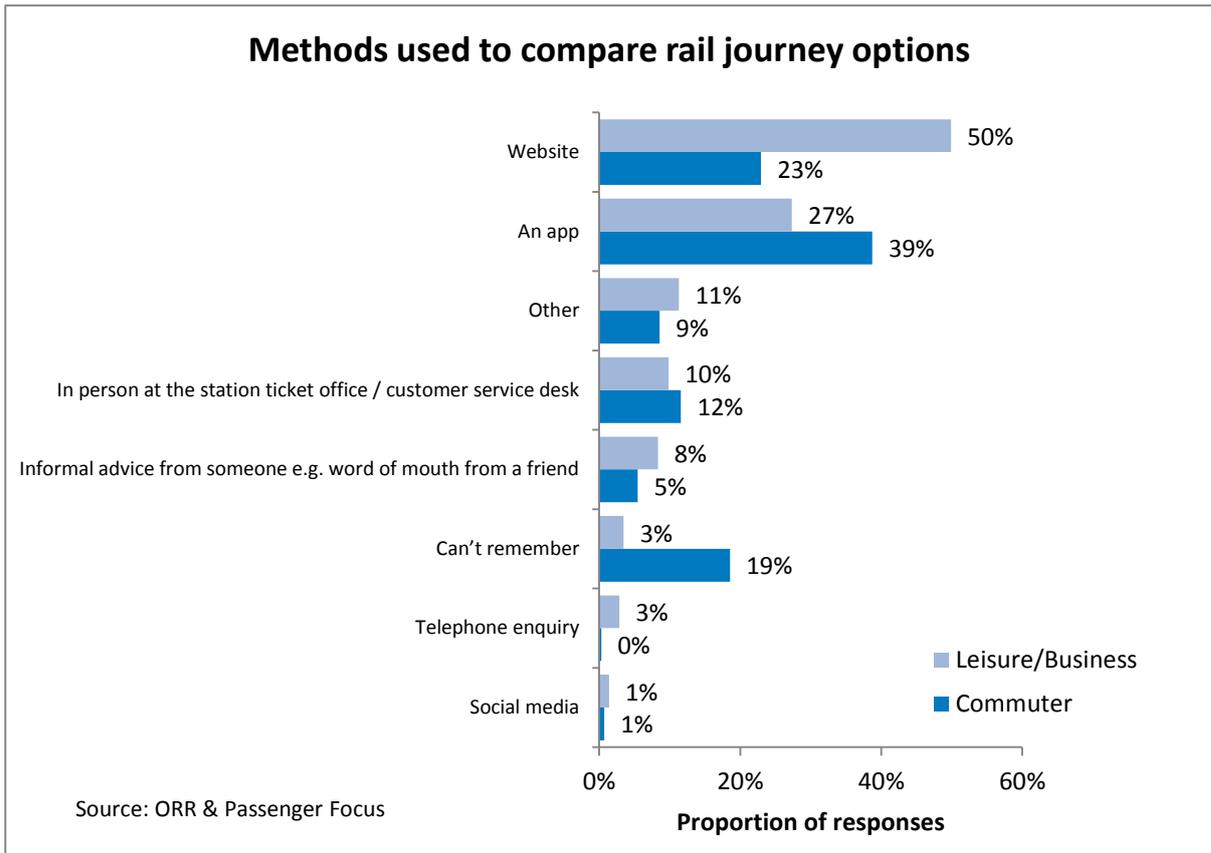
**New research**

**Planning rail journeys**

3.32 Our research focused on when and why people compare specific options for their rail journey. Passengers taking long journeys, or those with disabilities, are more likely to spend time planning. For all types of passenger, train times were the most important factor considered. Familiarity or frequency with making the journey was the main reason given for why people did not compare rail options. Websites were the most

common method used to compare rail options. Overall, the majority of respondents were satisfied that they could find the information they needed to make comparisons.





3.33 The qualitative research supports the finding that websites are the preferred method to compare rail journeys. Participants considered that ticket offices were not a convenient option to plan rail journeys: although some people would seek advice from staff, others felt that the staff of one train operator would not be able to offer advice on travel options for journeys with a different operator in another part of the country. People were more confident in the advice offered for shorter or more local journeys.

*“I’m sure my local station could sell me a ticket in advance but whether they would have all the details I don’t know” [Infrequent, London]*

### **Box 3.5 – Passengers with disabilities**

Our research included 6 in-depth interviews with disabled people (including mobility, vision and hearing impaired). The information needed to plan journeys, and the extent that rail is a realistic choice of travel, varies depending on the nature and extent of the passenger's disability. However, planning tends to be more necessary and more complex than for other types of passengers. Key points raised in the interviews included:

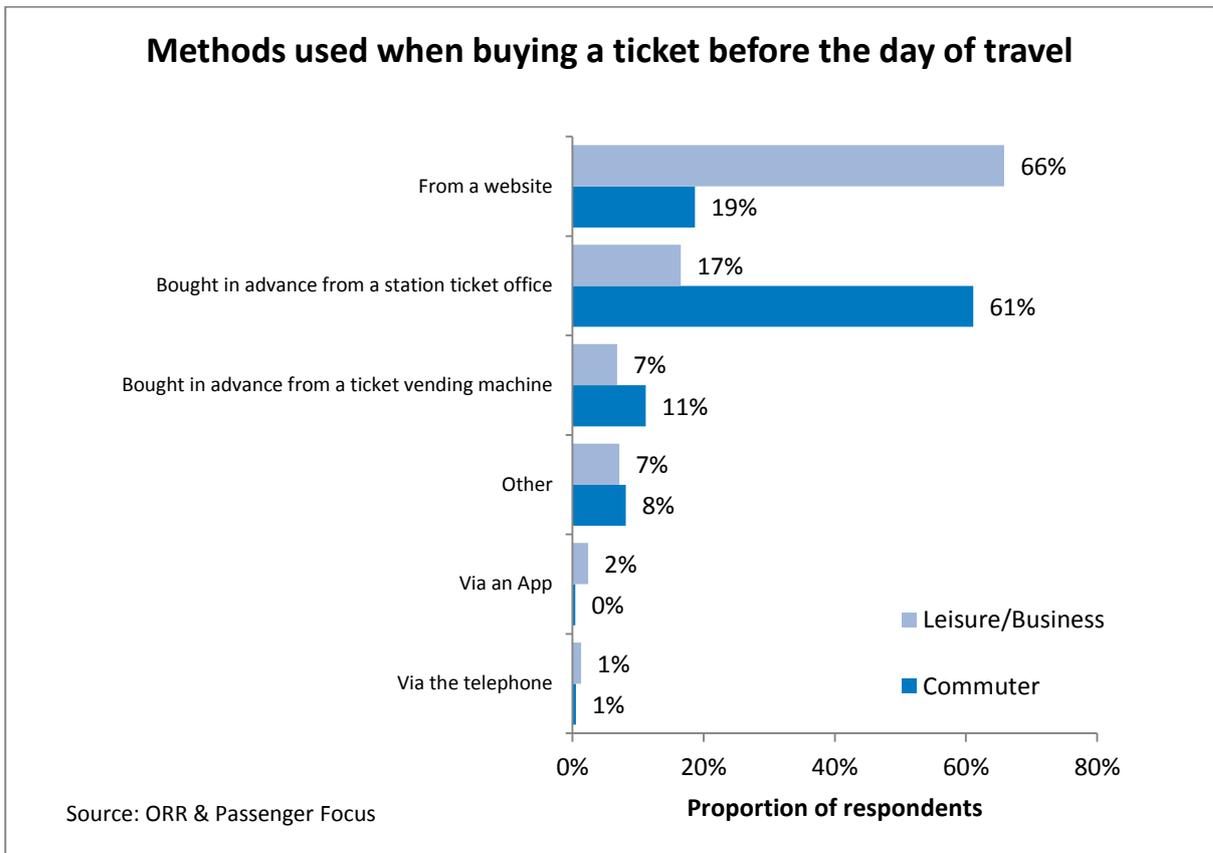
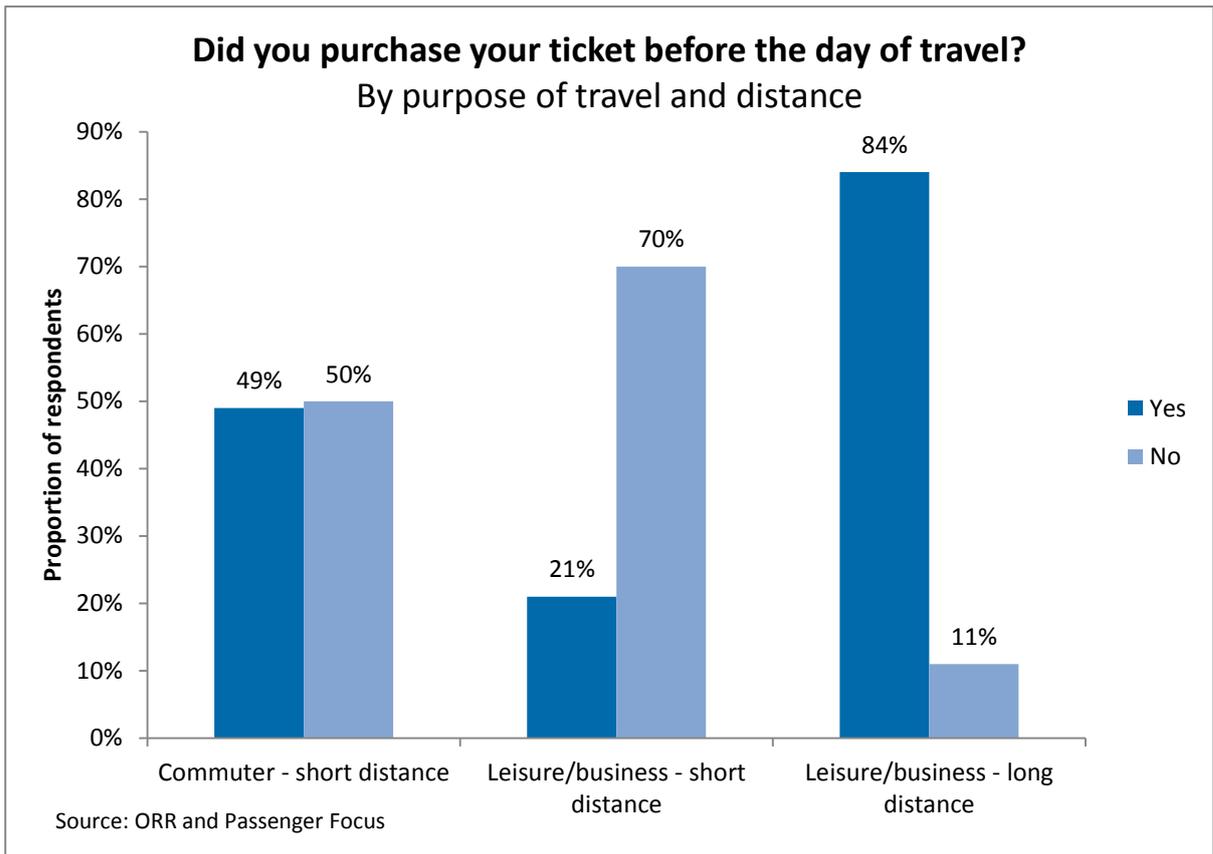
- Mobility impaired passengers felt the information available in advance on station layout was often very good. However, confidence with a journey was often related to their familiarity with the route or a positive experience of previously making a particular journey. Some people may therefore have a limited repertoire of journeys that they make regularly by rail, but use other modes for unfamiliar journeys.

*“There are a lot of people in the visually impaired and blind community who are afraid of doing the sort of journey I do, they don't have the confidence. They need somebody to show them the route plan in the first place, go through it with them a couple of times, and even then they would prefer to use a taxi or a ring and ride service rather than struggle with public transport” [Vision Impaired, Manchester]*

- Websites and apps are not always suitable or available, perhaps not designed to meet their specific needs or unable to complete all aspects of journey planning (research, selecting a route / time and booking necessary tickets or assistance).

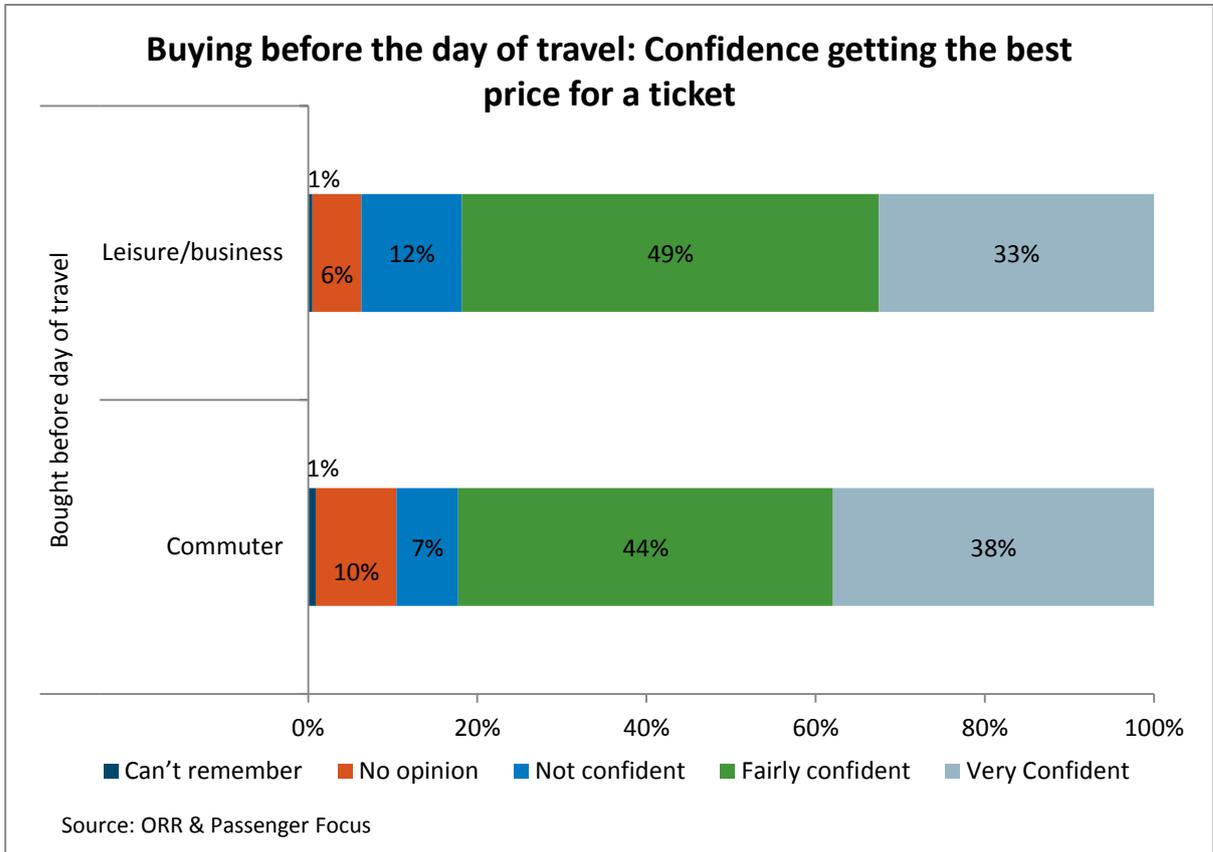
### **Buying tickets before the day of travel**

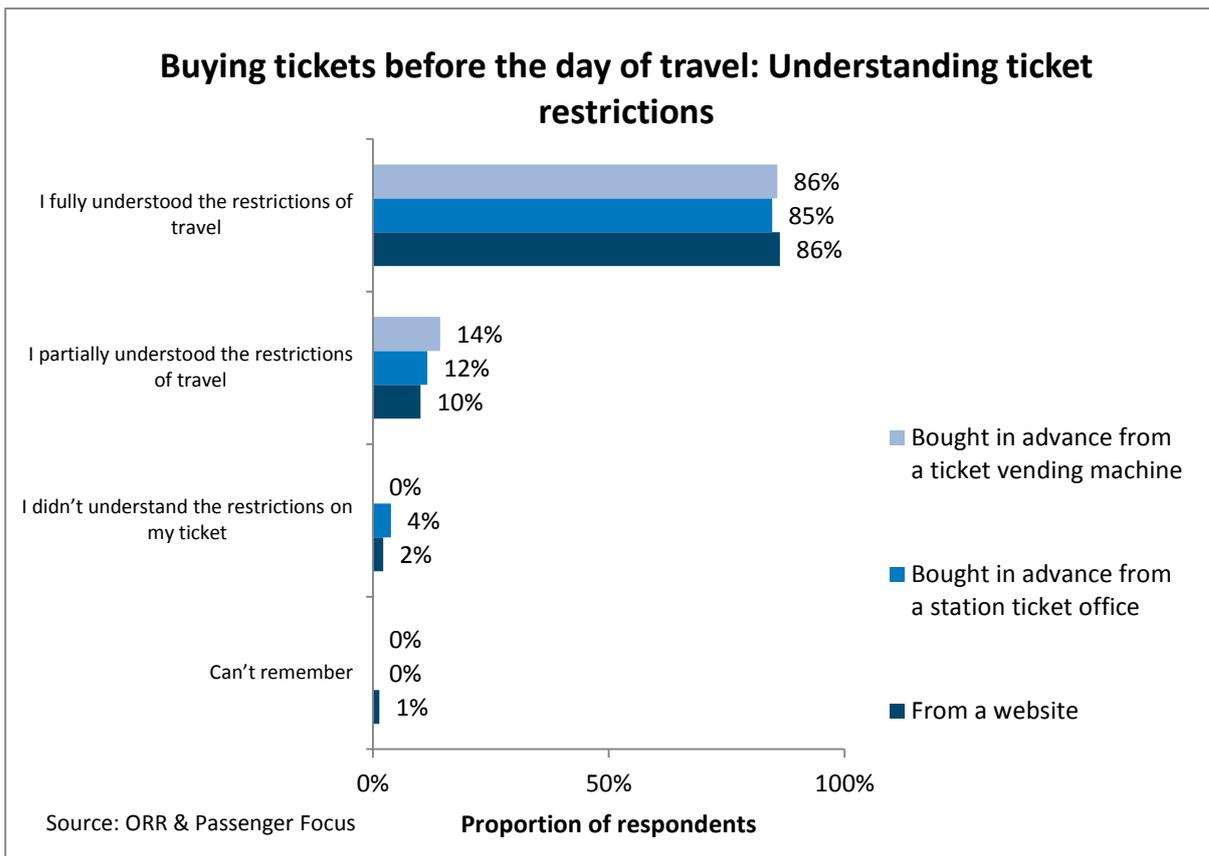
3.34 The quantitative survey found that over 80 per cent of leisure/ business passengers travelling long distance purchased their ticket before the day of travel. The main reason given was access to cheaper tickets (or purchase of a season ticket for commuters). Two thirds of leisure/ business passengers buy their tickets from a website, with over one third using the TOC's own website. Over 60 per cent of commuters use station ticket offices, with this driven by purchase of season tickets.



3.35 The qualitative research and quantitative survey explored how confident people were securing the best value ticket and the extent that ticket restrictions were clearly

explained when buying tickets before the day of travel. In summary, we found that confidence is high, both with obtaining the best price for tickets and understanding any relevant restrictions. However, this contrasts with less certainty expressed by participants when the issue was explored during focus group discussions. There is also significant variation in whether, if at all, ticket restrictions were made clear during the purchase.





3.36 Discussions during the qualitative research found a very mixed understanding of ticket types. There was recognition of the three ticket categories (Peak, Off-Peak and Advance), but also common use of terms that no longer apply (e.g. ‘Supersavers’). Participants also considered that many inconsistencies to this basic structure exist between TOCs.

*“There may well be three core names but I’m sure we could come up with half a dozen others that we are aware of. The structure is complicated and not transparent”*  
*[Frequent, London]*

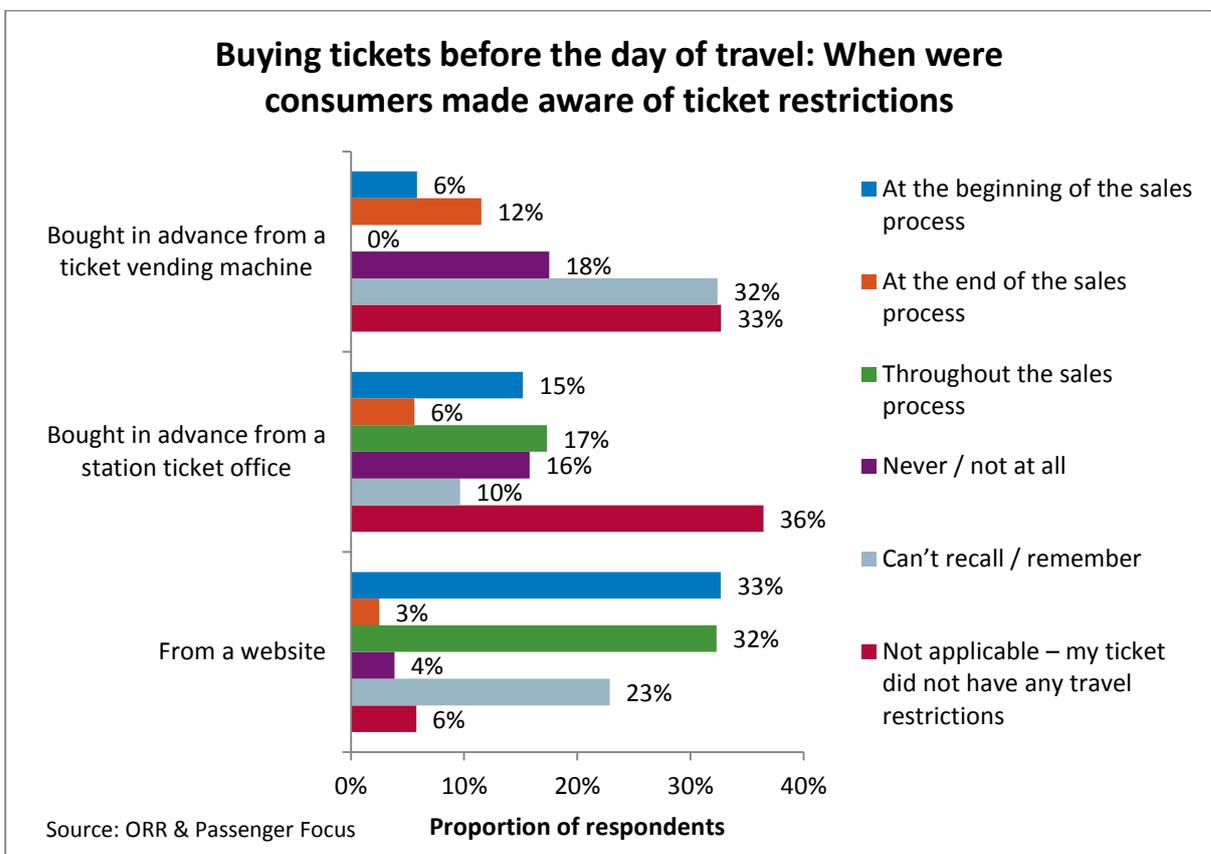
3.37 Despite this, participants recognised the benefits of a more complex fares structure that made discounted tickets available. There was broad understanding of the benefits of Advance tickets. However, there was much greater uncertainty over the specific details: how early Advance tickets became available, how long they are available for, from whom they can be purchased and what happens if you can’t travel. Some participants understood the system very well, others had very little idea of how to use Advance tickets effectively.

*“If we decide to go to Scotland during the school holidays, I will make sure I’m online 13 weeks before booking it to get the best deal”* *[Frequent, London]*

*“I know that it’s cheaper to book planes in advance but I don’t understand how it works with trains or whether it’s a different price if you book at different times”*  
*[Frequent, Birmingham]*

*“With the Advance tickets, it specifies a certain train on a certain day and you can’t get any of your money back if your plans change. I’ve very often had meetings cancelled then you don’t get your money back so it’s better to get your ticket at the station on the day” [Frequent, Manchester]*

- 3.38 Participants also discussed some of the benefits and challenges with other options, including collecting ticket on departure from a TVM and print-at-home tickets (or other e-tickets). Understanding of these options varied widely across participants.
- 3.39 The quantitative survey asked respondents when ticket restrictions were brought to their attention. As noted above, websites are the main method used to purchase tickets before the day of travel and this is one of the more effective channels to ensure people are aware of restrictions. One third of respondents were made aware of ticket restrictions at the beginning of the sales process, with 68 per cent overall informed at some point during the sale. However, over one fifth of respondents could not recall whether ticket restrictions were in fact brought to their attention. Results for the other sales channels, TVMs and ticket offices, are more varied. Only 6 per cent of respondents using TVMs were certain that ticket restrictions were explained at the beginning of the sales process, rising to 15 per cent when using ticket offices. In general, the quantitative survey found that respondents aware of ticket restrictions at the beginning of the sales process were more confident that they could secure the best price.



3.40 Finally, the qualitative research found that some people did not pay close attention to restrictions. When presented online, restrictions may be treated as a formality, rather than important travel information, a habit adopted from other online purchasing.

*“The restrictions are always in the small print but when you buy things online who on earth reads the terms and conditions” [Infrequent, London]*

*“All the terms and conditions are there when you buy the ticket online but I never read any of them, I just tick the box to say I accept them” [Frequent, Birmingham]*

### **Box 3.6 – Innovation with Advance tickets**

CrossCountry has implemented a '10 minute reservation' scheme allowing passengers to book seat reservations for tickets already purchased using CrossCountry's ten minute reservations SMS service. Passengers may also reserve seats when tickets are:

- bought from a train ticket booking outlet before the day of travel;
- bought with a reservation on the day of travel from the website or App;
- bought via the CrossCountry call centre on the day of travel; and
- have already been bought and can be accessed via the 'my account' section on the CrossCountry website.

CrossCountry has also allowed passengers to buy Advance fares up to 10 minutes before departure ('Advance on the day'). Most Advance tickets can only be purchased up to midnight of the day before you travel.

Passengers will now be able to benefit from potentially significant price savings plus the opportunity to secure a seat reservation, yet retain a degree of flexibility in their travel plans. For the train operator it allows prices to better match demand where spare seats would otherwise go unused.

There are some risks. Some passengers may find their seat has been reserved, mid-journey, by a new passenger boarding the train. Passenger Focus has stressed that seat reservations will need to be closely managed by train staff to resolve disputes before they arise. If the train is very busy, the train manager will be able to suspend further ticket sales and reservations.

Passenger Focus considered that, despite the risks, this innovation could significantly benefit passengers but must be monitored over time and adapted to meet passengers' needs in light of experience.

## **Themes and issues**

3.41 This section sets out the main themes or issues arising from the research presented above.

## Comparing modes of travel

- 3.42 The default mode of choice for many people is the car (as suggested by the National Travel Survey, see paragraph 3.4 to 3.6 above). Despite this, a significant minority of people do consider alternative modes of transport when planning journeys:
- (a) passengers travelling for leisure/ business are more likely to compare modes of travel, in particular for long distance journeys. The cost of journeys and overall travel time are the most important factors considered when choosing rail, with over two-thirds of people able to easily compare these between modes;
  - (b) a significant minority of commuters (about one-fifth) also compare different modes of travel. The train is chosen because of the reliability of journey time. However, only 44 per cent of commuters find this easy to compare between modes; and
  - (c) online information is relied upon, but some felt that comparable information should be more easily presented in a single place (a 'price comparison-style' website).

## Planning rail journeys

- 3.43 People spend more time and effort planning a rail journey if either i) travelling long distance or ii) they are disabled. Overall, information is readily available with significant reliance on websites to plan journeys. The range of evidence available raises some concerns that disabled passengers are not always able to plan with confidence or rely on the support offered. The limited evidence suggests that disabled people who are unfamiliar with using railways perceive that rail travel is difficult. This is in contrast to the greater confidence of disabled people that use rail more regularly.
- 3.44 Planned engineering works can cause serious disruption for passengers. They are, however, essential to maintain and improve the rail network. The rail industry has improved how it communicates to passengers before and during planned works, in particular so passengers are aware of changes to services and alternative routes or use of rail replacement services. An area to address is ensuring passengers understand the beneficial impact or outcome to their journey from the works undertaken.

## Purchasing rail tickets before the day of travel

- 3.45 The evidence suggests three key points:
- (a) Advance tickets appear well established with some groups of passengers, principally leisure/ business passengers travelling long distance, with growing understanding that these can offer lower prices at the cost of less flexibility. Some passengers may not always be taking advantage of better deals, for example those taking day trips may not consider their ticket options carefully and commuters have limited flexibility with the current fare structure;

- (b) online sales channels are important, especially for those making leisure/ business trips. Ticket offices remain important to commuters, especially when renewing their season tickets; and
- (c) passengers may be overconfident when purchasing tickets. Respondents to our survey were confident that they could secure the best priced ticket and understand the relevant ticket conditions. However, this is not supported by past research into ticket complexity, the variation between sales channels of when ticket restrictions are brought to peoples' attention and the greater uncertainty expressed during focus group discussions. Even for online sales (the main way in which Advance ticket are bought), more than one-fifth of people are unsure whether ticket restrictions were made clear.

## **Actions**

3.46 A number of initiatives are in place or being pursued that address:

- (a) making information about train performance more widely available and easy to use;
- (b) enabling third parties to develop train information apps;
- (c) steps by the rail industry, and recent announcements by DfT, to tackle complexity of tickets and awareness of ticket terms and restrictions; and
- (d) wider awareness and easier access to travel assistance for disabled people.

### **Information about train performance**

3.47 The rail industry, including Network Rail, has taken a number of steps in recent years to make information on past rail performance more easily available. For example, Network Rail holds and publishes information on PPM and 'right time' performance measures.

3.48 The ORR has also published a range of information. This includes data on the number and types of complaints received by TOCs and Passenger Focus or LTW. The ORR has increasingly published data at a TOC level, for example PPM and annual 'right time' punctuality information. Recently, ORR was awarded UK Statistical Authority status, allowing publication of 'national statistics', which will help to improve the access and clarity of information held by us and available online.

### **Information for third parties**

3.49 The rail industry gathers a range of key information on the day to day operation of the service that allows access to rail timetables but also up to the minute information on performance. This allows passengers to be kept up to date in real time. The information also allows creation of third party apps. Much of this information is held by the rail industry, and available to third parties through a code of practice it has established to allow access to this data.

## Ticket complexity

- 3.50 Following ORR's report into Ticket Complexity (June 2012) the rail industry, through ATOC, undertook to implement some immediate short term changes and committed to a longer term strategy to improve ticket information. The short term initiatives were focused around improving the quality of fares information available to ticket retailers and passengers, so that passengers are provided with clear and comprehensive information:
- (a) an overhaul of the data underpinning the ticketing system so that core information can be delivered in a much more comprehensive, consistent and passenger friendly way through websites and TVMs;
  - (b) improving the information and advice on ticket restrictions available from National Rail Enquiries (NRE); and
  - (c) an overhaul of how information is presented on tickets to ensure clearer information on validities and restrictions, including an 'endorsement' box where rail staff can note where passengers have been allowed to travel outside of the normal ticket restrictions (for example on an alternative route) to avoid subsequent penalty fares.
- 3.51 The longer term strategic element of the programme focuses on the replacement of the existing fares database and associated fares distribution system over a three year period.
- 3.52 To date, improvements to ticket information available from NRE have been made. This includes a 'Your Ticket' section of the NRE website and a 'Guide to Tickets', which provides advice and information to get the best value ticket and understand restrictions.<sup>17</sup> This leaflet is available at all stations with racking facilities. The remaining initiatives are not yet implemented, for example improving information available on TVMs, with ATOC indicating roll-out of these changes from early 2014.
- 3.53 Train operators have also implemented changes:
- (a) working to make TVMs more user friendly with clearer language and simpler steps to select a ticket;
  - (b) simplifying online booking procedures with clearer and easier access to restrictions and T&Cs; and
  - (c) ensuring ticket office staff are trained to offer unbiased advice and sell customers the most appropriate ticket for their needs as well as explaining any relevant restrictions prior to purchase.
- 3.54 In addition, the recent DfT paper *Rail Fares and Ticketing: Next Steps* (October 2013), has confirmed that ORR will take the lead in developing:

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<sup>17</sup> See National Rail Enquiries at [http://www.nationalrail.co.uk/posters/NR\\_GuidetoTickets\\_2013.pdf](http://www.nationalrail.co.uk/posters/NR_GuidetoTickets_2013.pdf).

- (a) a Code of Practice on ticketing information that will ensure passengers can access the information they need to confidently select the most appropriate ticket for their journey; and
- (b) a review of the market conditions for selling train tickets to consider whether the current markets are operating efficiently, effectively, and in the best interests of passengers and taxpayers.

3.55 The DfT paper also stated that ATOC will publish the results of the independent mystery shopping it commissions into how well ticket office staff, ticket machines, and web retail channels perform in terms of selling passengers the most suitable ticket for their journey.

### **Assistance for disabled passengers**

3.56 In September 2013 the Transport Select Committee called on the ORR to “launch a widespread campaign to ensure that disabled people are aware of their rights regarding accessibility to the rail network, including receiving a taxi to the nearest available accessible station if necessary.”<sup>18</sup> The ORR is now responsible for approval of the DPPPs and is considering how to best meet this obligation (see paragraph 2.25).

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<sup>18</sup> *Access to transport for disabled people, fifth report of session 2013-14*, Volume I, HC 116, September 2013.

## 4. The journey

### Summary

- Passenger satisfaction scores have generally improved over recent years. However, despite historic improvements to rail performance (i.e. punctuality) not all regulated targets have been met since 2010-11, specifically in the long distance and London & South-East sectors.
- The industry appears to suffer from a persistently poor perception of its services. This is illustrated in the higher satisfaction experienced by passengers that have asked rail staff for assistance compared to the ratings given for staff attitude and helpfulness in general.
- Some train operators are introducing innovations. For example, developing e-tickets that offer greater convenience to passengers or exploring new ways of providing information to help plan journeys, such as about train crowding or disruption to services.
- Ticket buying habits are changing with growing use of online sales channels, but many passengers buying tickets on the day of travel are still likely to use ticket offices (57%), with around one third using Ticket Vending Machines (TVMs). Older passengers are more reliant on ticket offices. People who are not working or working part time are more likely to purchase tickets on the day.
- As we found when people buy tickets before the day of travel, passengers are generally confident of getting the best price, especially if informed of ticket restrictions at the beginning of the sale. However, this initial confidence is not supported by the wider evidence. We have found significant variation between sales channels for when, if at all, passengers are given information about ticket restrictions. For example, nearly 30 per cent of respondents buying from a ticket office stated they were not informed about ticket restrictions. Our qualitative research found that some people still perceive rail fares as complex or counter-intuitive. This is exacerbated where passengers do not have a clear reference or benchmark price against which to compare rail fares, for example where they do not make the same journey regularly. Some passengers consider that getting a good price is more down to luck than judgement.
- Previous research, for example by Passenger Focus, also found some confusion or complexity with ticketing. This affected passengers using ticket offices or TVMs. In the case of TVMs the main issue was the lack of intuitive prompts or instructions to guide passengers to making the best purchase and insufficient explanation of ticket restrictions.

## Summary

- Passengers have more ways of finding out about rail services and any disruption to scheduled services, with a growing use of apps. These are seen as complementary to traditional information channels (i.e. display screens and public announcements).
- Despite greater access to information, passengers' experience of delays remains poor. Less than two-fifths of NRPS respondents were satisfied with how train operators manage delays. Information about the likely length of delay or alternatives routes is not always reliably supplied. A third of passengers travelling for leisure/business and nearly half (47%) of commuters state they received no information about delays whilst on board the train. A significant minority also report that the information supplied was not useful for them to manage the delay. Some respondents stated that information from different sources can be inconsistent. During the more serious delays passengers are not always properly cared for, with passengers left stranded, with poor information and without suitable accommodation.
- Disabled passengers share many of the same concerns as passengers overall with punctuality and reliability of trains a key concern. There is some evidence that rail services are not serving disabled passengers well on every occasion: additional assistance is not always working smoothly on the day, facilities such as TVMs are not always accessible to disabled passengers and disabled people feel slightly less safe compared to passengers overall.
- For most of the issues identified affecting passengers during the journey, the rail industry, government or ORR has work in place to address these concerns. For example, the ORR is monitoring performance of Network Rail against punctuality, and has already taken enforcement action to address performance on Long Distance and London / South-East services. The rail industry has independently committed to actions to improve how tickets are sold and the information provided, which will be supported by a retail code of practice developed with ORR and operators. ORR continues to monitor industry performance under the PIDD licence obligations and has recently taken responsibility for approval of industry disabled people's protection policies (DPPPs).

## Structure of this chapter

4.1 This chapter is structured as follows:

- (a) focus of this chapter, describes the stages of the passenger transaction considered in this chapter;
- (b) why this is important, describes why these stages are important to passengers and a successful railway;

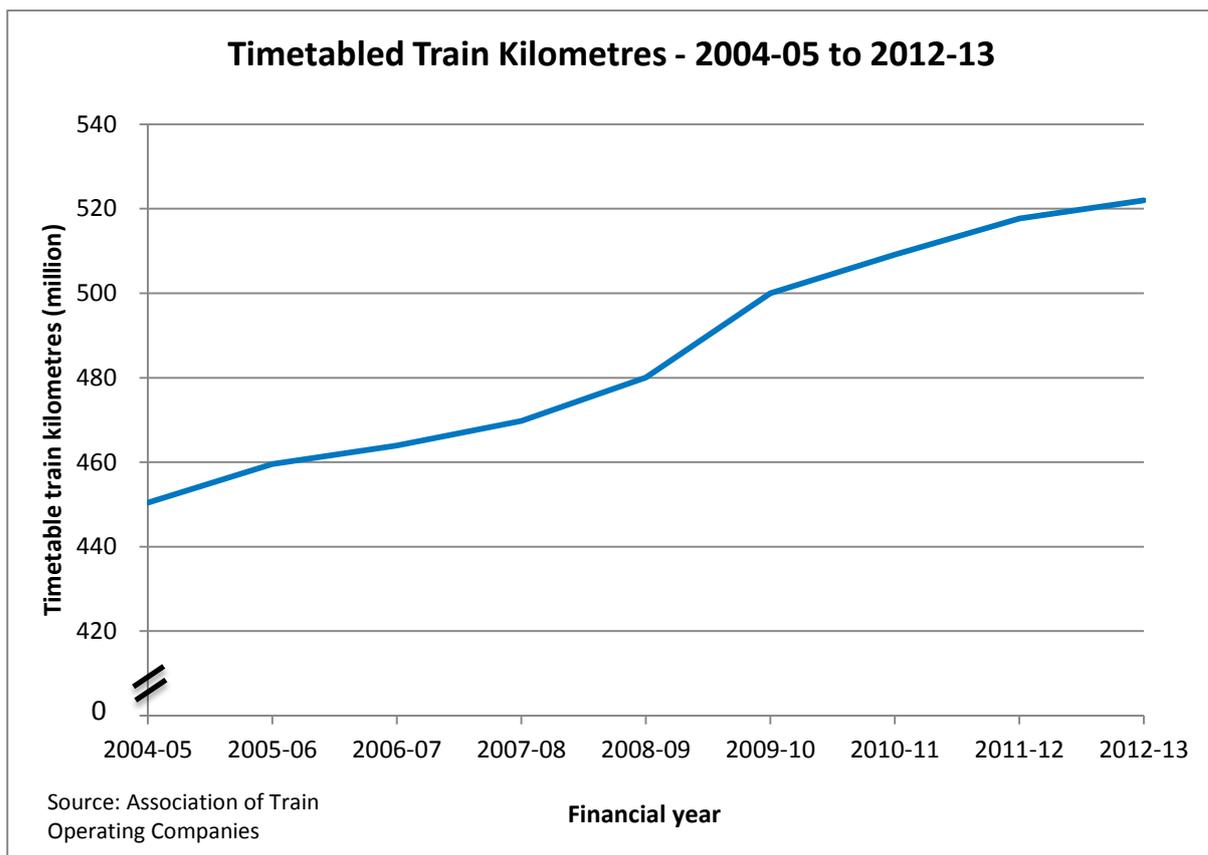
- (c) at the station, presents research on passengers experience using stations and the information provided to plan or continue journeys;
- (d) purchasing tickets, describes passengers' habits when buying tickets on the day of travel and present research on the quality of passengers' experience;
- (e) on the train, presents research on passenger perceptions of train performance and comfort;
- (f) managing delays and disruption, presents data on the incidence and duration of delays and passenger perceptions of how well these are managed;
- (g) themes and issues, outlining key points from the evidence presented; and
- (h) actions by industry or ORR that address any issues identified.

## Focus of this chapter

- 4.2 This chapter considers four key steps where passengers must make good decisions to enjoy a successful journey or where passengers are dependent upon the quality of service delivered by the railway:
- (a) At the station – using and accessing station services, including the quality of information supplied to plan or continue journeys;
  - (b) Purchasing tickets – focusing upon the experience of those purchasing tickets to travel on the same day, often relying on ticket vending machines (TVMs) or purchase from ticket offices;
  - (c) On the train – the delivery of the core service to passengers, considering punctuality, comfort, safety and information; and
  - (d) Managing delays and disruption – the effectiveness with which delays are managed and passengers kept well informed.
- 4.3 We have considered the experiences of different types of passengers and, if relevant, the experience for different routes or services. This includes disabled passengers and those without ready or easy access to the internet. Where relevant we have considered evidence from three sources: published research; the National Rail Passenger Survey; and new research that includes a quantitative survey and qualitative research (see paragraph 2.9.)

## Why this is important

- 4.4 The efficient movement of passengers is the core function of the railway. It contributes to economic growth and social cohesion. Passenger numbers have grown significantly in recent years (see paragraph 2.17 to 2.18). To meet this growth, usage of the rail network has intensified, clearly seen by the growth in the kilometres trains are now running. These additional services must meet the punctuality targets set for the industry (see paragraph 2.20 to 2.21).



- 4.5 Passengers must make choices about the time or route of travel. If passengers make errors, or face difficulty with key steps such as purchasing a valid ticket, this can undermine confidence in railways and lead to penalties for individuals.
- 4.6 Once aboard the train, service quality should be maintained or managed so passengers can complete their journey safely and as quickly as possible. At this point, passengers are nearly wholly reliant on the expertise and dedication of the train operator and rail industry more widely to reach their destination safely.
- 4.7 Unlike other utility-style services the experience of rail is very immediate and personal. Recent research by ORR comparing satisfaction with rail to other utilities found it performing poorly on a range of information, customer service and value measures against all but energy companies.<sup>19</sup> This is disappointing for an industry that has improved performance steadily over time and has generally high levels of passenger satisfaction.
- 4.8 In the longer term, ORR wants to see a rail sector that is increasingly dynamic and commercially sustainable. An important part of this is for the industry to become more able and encouraged to respond to the needs of passengers.

<sup>19</sup> *Rail Passenger Satisfaction Benchmarking, Report on ONS Opinions and Lifestyle Survey, December 2013, ORR.*

## The principles important to a good experience

- 4.9 This chapter focuses on two different activities: purchasing a ticket and the quality of the journey. As in Chapter 4, before you travel, purchasing a ticket depends upon:
- (a) access – information and advice is easily available to any passenger without difficulty;
  - (b) quality – information and advice can be relied upon, it is accurate; and
  - (c) choice – information enables easy comparison of travel options and relevant restrictions.
- 4.10 When using the station and for the train service itself, a good passenger experience relies upon:
- (a) access – the station and train can be physically accessed by all passengers; and
  - (b) quality – the train runs to the time scheduled, with facilities and services meeting passengers needs and if disruptions occur these are resolved promptly.
- 4.11 To manage delays effectively, key principles are:
- (a) empowerment – the necessary information is supplied, through a range of channels at the right time, to enable passengers to manage the delay; and
  - (b) quality – delays or disruption are resolved safely and as promptly as possible, with information supplied to passengers as accurate as possible.
- 4.12 For different types of passengers some principles will be more relevant than others. For example, disabled passengers must be confident that they can access the station and will receive sound advice to make their journey easily. Passengers familiar with a particular journey, or commuting to work, may be more interested in the punctuality of the service delivered. Less frequent travellers more reliant on advice to choose the right ticket.

## At the station

- 4.13 This section considers the ability of passengers to easily access the station and obtain the advice or information they need to make a rail journey or continue their journey once disembarked. It is organised as follows:
- (a) previous research – summarises disabled passengers' experience of using assistance at the station; and
  - (b) National Rail Passenger Survey – presents passengers' habits to get to / from the station and satisfaction with information and help provided at stations.

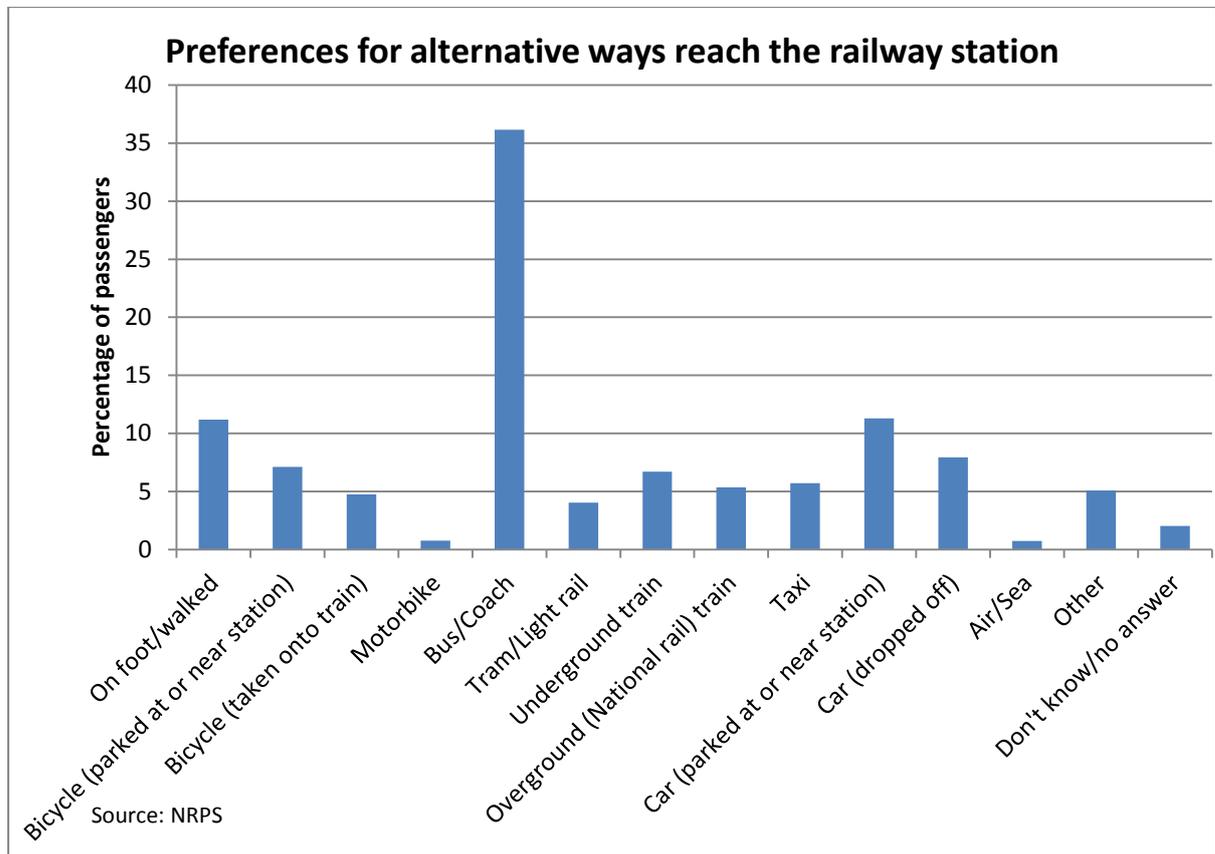
## Previous research

- 4.14 There is little direct research into access to stations or quality of advice: some of this is considered below under purchasing a ticket. Passenger Focus' research into

Passenger Assist (January 2011) considered the experience of assistance at the station on the day of travel.<sup>20</sup> This found disappointing outcomes from using Passenger Assist, with station staff prepared for the arrival of mystery shoppers on 65 per cent of occasions, and some evidence that Passenger Assist booking information had not been passed through to staff. In 38 per cent of cases a specific meeting point was specified. In a number of cases, where the passenger needed assistance to an accessible station, alternative transport (usually a taxi) was not provided or the passenger was not advised that a station would be inaccessible.

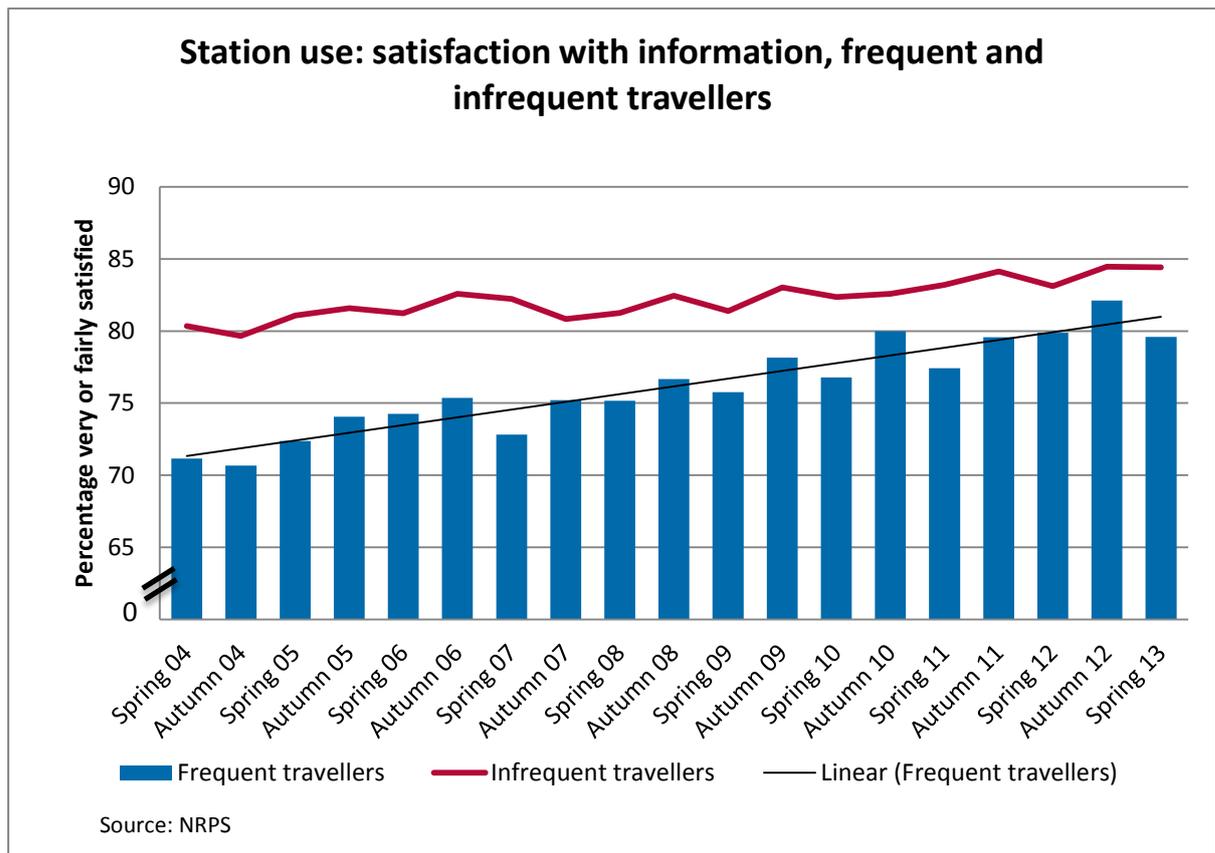
## National Rail Passenger Survey

4.15 The NRPS show that nearly 50 per cent of passengers walk to the station and more (55 per cent) continue their journey on foot once disembarked. Just over 10 per cent of people use a bus. The NRPS also asks what peoples' preferences are for alternative ways of reaching the station: the majority of respondents want better bus connections.



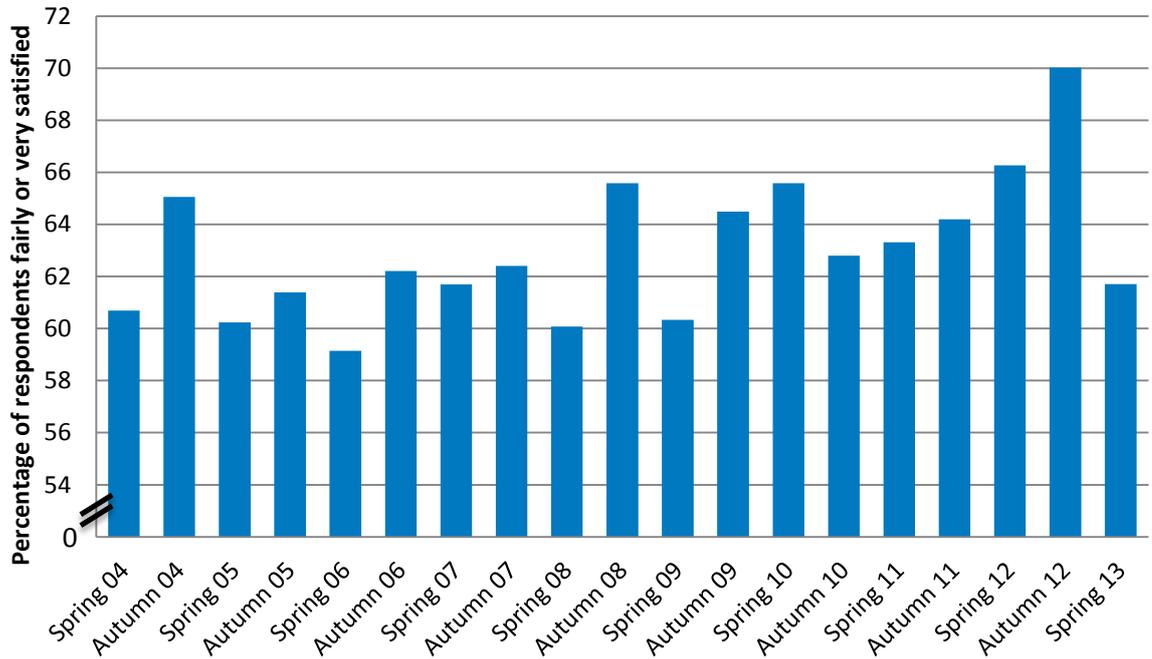
4.16 The NRPS suggests that the quality of information provided to passengers has improved over time, with the satisfaction gap between those making frequent or infrequent rail journeys narrowing.

<sup>20</sup> Pages 15-19, *Assisted Passenger Reservation System*, January 2011, Passenger Focus.



- 4.17 The NRPS also asks about the attitudes and helpfulness of staff and overall station environment (see annex for these results). For these measures, respondents' views have not changed significantly over time, with satisfaction scores of between 60 – 70 per cent for the attitude and availability of staff. It is notable that where help has been asked for satisfaction is nearer 80 per cent, suggesting a gap between perception or willingness to seek advice and the quality of advice from staff actually delivered.
- 4.18 Disabled passengers surveyed by the NRPS held similar views to passengers overall on the quality of information at stations and the attitudes and helpfulness of staff. However, only about two thirds of disabled respondents consider stations meet their particular needs, and the results for spring 2013 are very close (at 62 per cent) to the findings 9 years ago (spring 2004).

### Satisfaction with railway stations meeting the needs of disabled passengers



Source: NRPS

### **Box 4.1 – Network Rail Managed Stations – improving passenger information**

Network Rail manages 17 of the busiest stations on the network, including the major London and Scottish terminal stations and others such as Leeds and Birmingham New Street. Its staff are visible on the stations and may be spotted by their blue tabards. This places them in a customer facing role. It was recognised, however, that no formal customer service and passenger information training was in place for these staff.

Network Rail developed a number of approaches to address this, including:

- > A new suite of training for station staff, including e-learning and specific line manager modules.
- > Customer Information Plans (C.I.Ps) for all managed stations. These plans describe when and who station staff should talk to when keeping on top of changes to scheduled services, including when there is disruption, as well as listing responsibilities, resource arrangements and post incident review requirements. All plans have been developed and signed off by TOCs that use the station.

## **Purchasing tickets**

- 4.19 A critical part of a successful passenger experience is the ability to purchase, and be advised on, the most suitable rail ticket necessary to make a journey. This section considers the quality and access to advice on tickets, including whether restrictions on tickets are made clear.
- 4.20 It is organised as follows:
- (a) previous research – summarises past research that identified concerns with ticket complexity and whether passengers' could achieve best value;
  - (b) National Rail Passenger Survey – summarises passengers' preferences for how they buy tickets on the day of travel and satisfaction with the information provided and ease of purchase; and
  - (c) new research – presents the quantitative survey results and qualitative research into ticket buying habits, passengers' confidence buying tickets and awareness or relevant restrictions using different sales channels.

## Previous research

- 4.21 The complexity of rail tickets was the focus of ORR's work in 2012.<sup>21</sup> Our research found:
- (a) uncertainty over the times of peak and off-peak travel, with confusion by passengers of whether the peak applies to departure or arrival time and only 26 per cent of people confident of the off-peak time for their journey;
  - (b) confusion with common industry terms, such as route descriptions "any permitted" or "London Terminals", and the way that other core restrictions (such as being able to get on/off a train during a journey) were communicated despite publication of industry leaflets and guidance; and
  - (c) Ticket Vending Machines (TVMs) made existing problems of complexity or confusion worse where limited information on ticket restrictions was provided and the presentation of information made the choice-process more difficult compared to advice from a ticket office.
- 4.22 The industry responded at the time by stating it was, and still is, taking steps to address these concerns. These actions are outlined below (paragraph 4.69).
- 4.23 Passenger Focus' own research into TVMs found a number of barriers for people to be confident they had purchased the correct ticket.<sup>22</sup> These included issues such as screen display, but the main issues were the lack of intuitive prompts or instructions to guide passengers to making the best purchase and insufficient explanation of ticket restrictions. This included some confusion over the terms used, for example whether a 'super-off peak' would be sufficient for a particular journey. Experience of having the wrong ticket meant that some people avoided using TVMs.
- 4.24 Passenger Focus mystery shopping of Passenger Assist found 84 per cent of shoppers were satisfied with the ease of buying the correct ticket.<sup>23</sup> Although various discounted tickets were available to disabled passengers standard Off-peak fares often proved less expensive. More recently the Transport Select Committee reported on concerns with access or use of TVMs, noting "a learning difficulties charity reported that its members find the volume of information on many ticket machine screens confusing and the writing on the display too small."<sup>24</sup>

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<sup>21</sup> *Fares and ticketing – information and complexity*, June 2012, ORR (<http://www.rail-reg.gov.uk/upload/pdf/ticket-complexity-report-june-2012.pdf>).

<sup>22</sup> *Ticket Vending Machine Usability*, July 2010, Passenger Focus.

<sup>23</sup> *Assisted Passenger Reservation System*, January 2011, Passenger Focus.

<sup>24</sup> Paragraph 36, *Access to transport for disabled people, fifth report of session 2013-14*, Volume I, HC 116, September 2013.

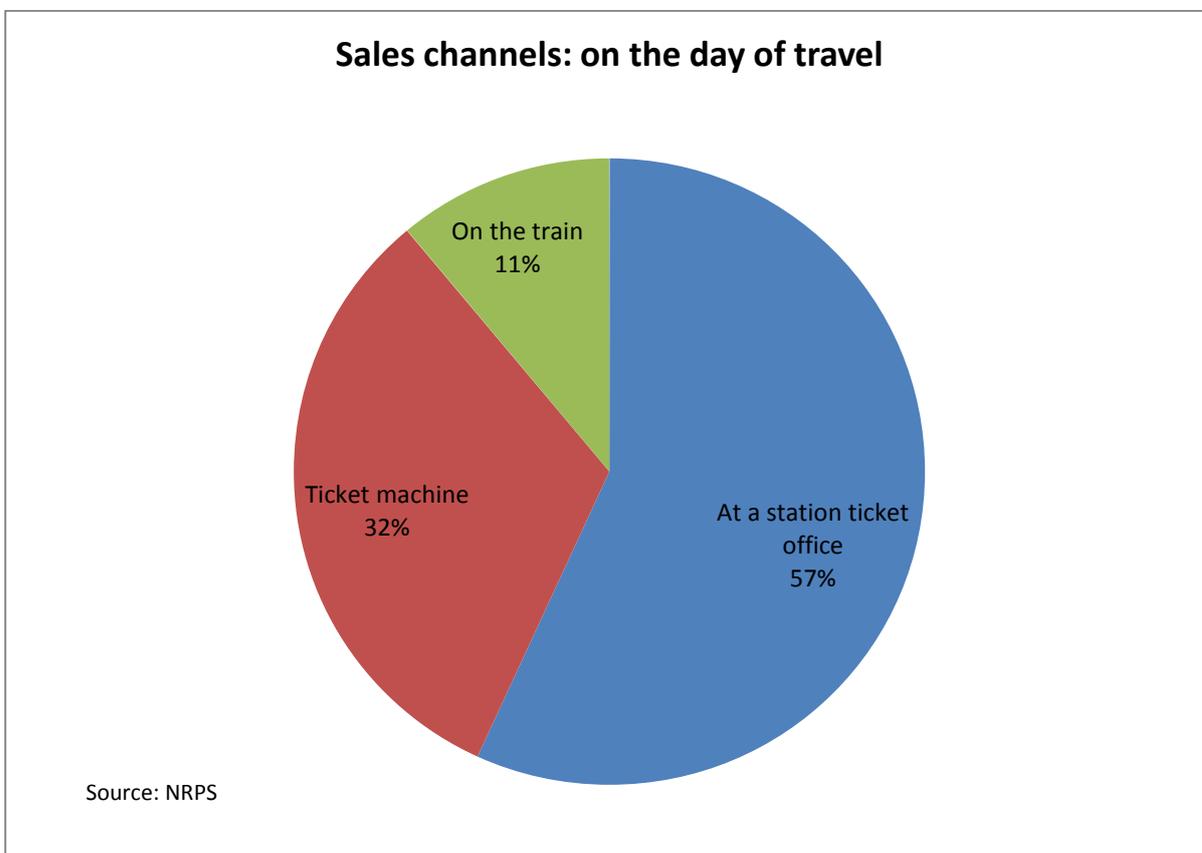
## National Rail Passenger Survey

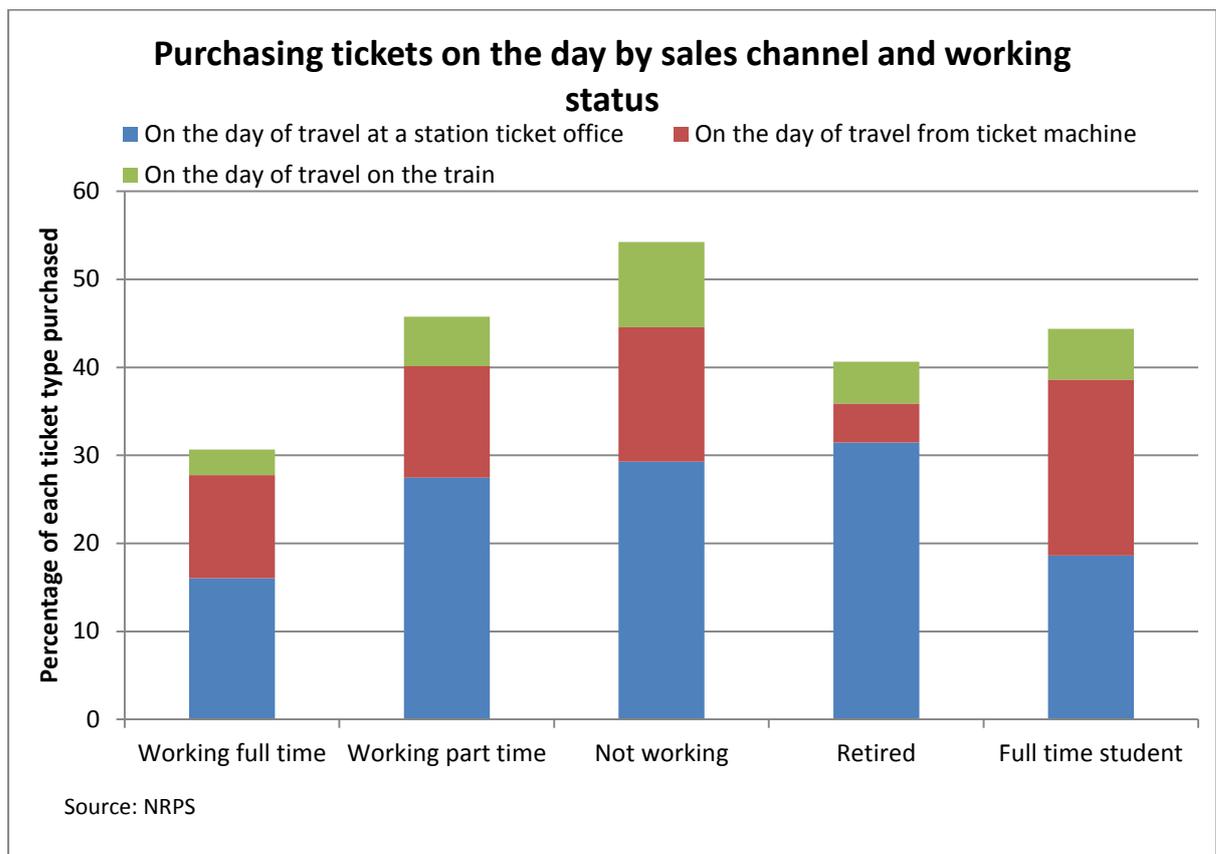
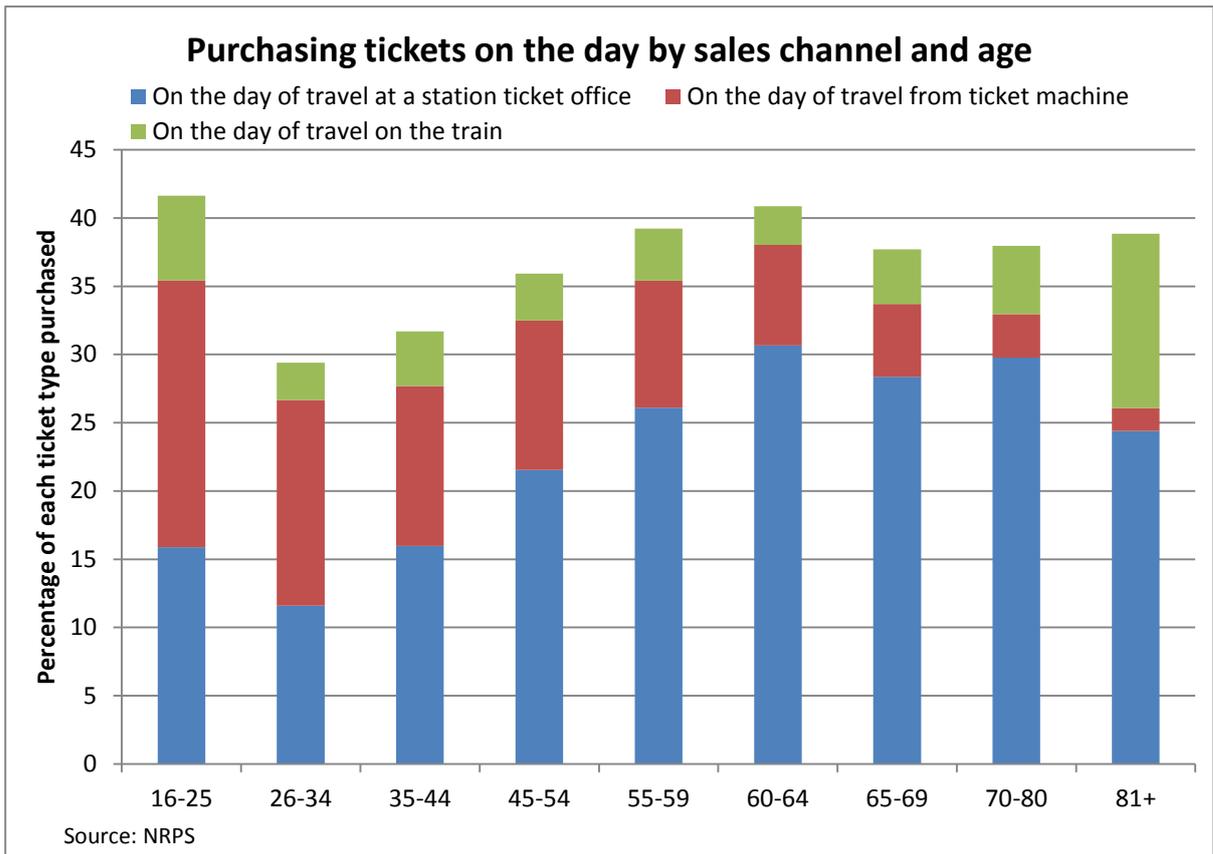
4.25 About 36 per cent of respondents to the NRPS purchase their ticket on the day of travel (see paragraph 3.28 above). This excludes those buying season tickets or topping up pre-paid smart tickets (mainly Oyster users). The following presents information on peoples' ticket buying habits and their satisfaction with the information used to buy tickets.

### Sales channels and ticket types

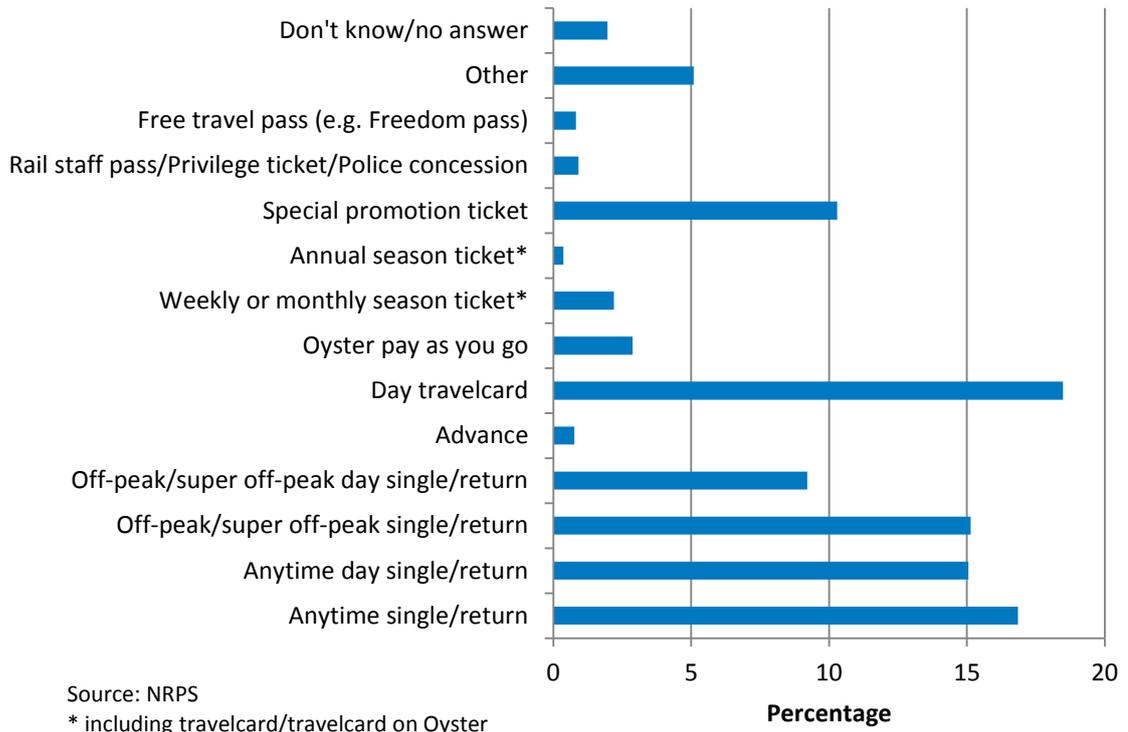
4.26 The majority of those purchasing tickets on the day (excluding season tickets or Oyster tickets) rely on the ticket office, with about one third using TVMs and one tenth purchasing tickets on the train (see Annex A: for more detailed results). The NRPS also allows a breakdown of sales channel by age of respondent and working status. Those aged 55+ rely to a greater extent than other age groups on the ticket office. In contrast, the youngest respondents (aged 16-25) make greater use of TVMs. The age groups in the middle (26-54) have a greater proportion of season ticket or Oyster-card users, hence overall proportions buying on the day of between 30 – 35 per cent.

4.27 Analysing the NRPS results by working status shows that those not working buy the majority of their tickets on the day (54%) and tend to use the ticket office. This is followed by those working part time (46%). The most common ticket types sold on the day of travel are 'walk-up' fares such as day travel cards, Off-peak and Anytime tickets, with about two-thirds of these tickets sold on the day of travel.

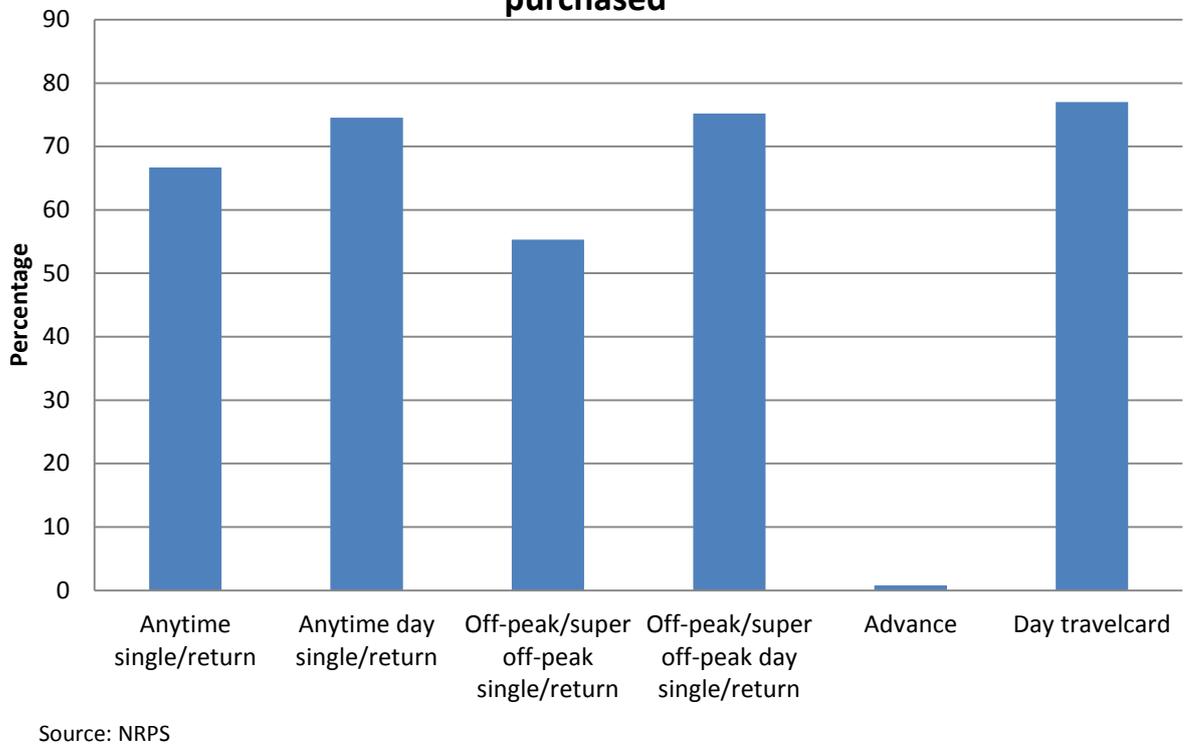




### Percentage of each ticket types bought on the day of travel

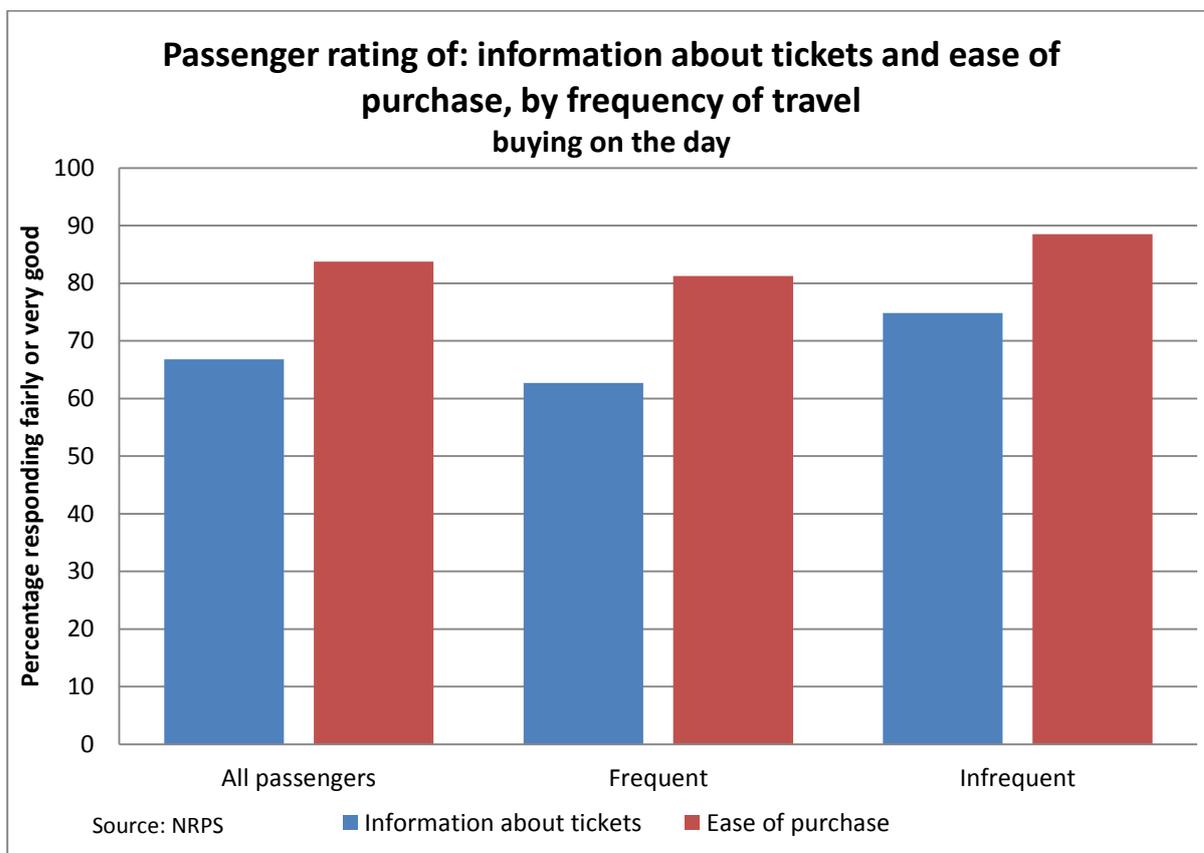


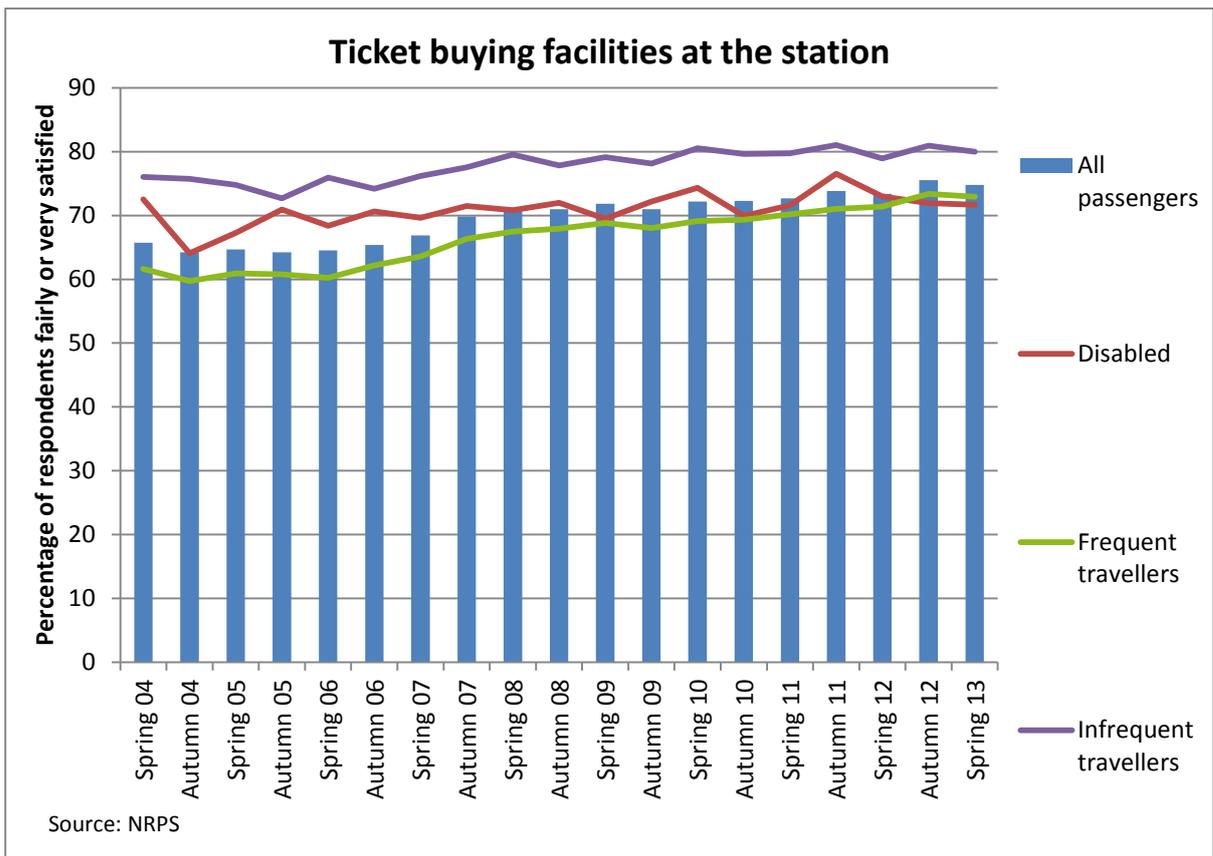
### On the day of travel: proportion of each ticket type purchased



## Satisfaction with information about tickets and use of sales channels

4.28 Overall, about two-thirds of passengers rate the information about tickets as 'fairly' or 'very' good, with just over 80 per cent rating the process of buying tickets as good. Overall satisfaction with ticket buying facilities at stations is 75 per cent, which is lower than overall passenger satisfaction. Satisfaction has also increased over time, by nearly ten percentage points since 2004. The views of disabled passengers are similar to the overall results. As already noted, those that travel frequently hold the railways to higher standards, and rate information on tickets, ease of purchase and overall satisfaction with ticket buying consistently lower than less frequent rail users. However, over time the gap in satisfaction scores has closed with frequent travellers becoming more satisfied, albeit a 7 percentage point gap remains.





### **Box 4.2 – End of the paper ticket**

The common ‘magstripe’ paper ticket has been used on the rail network since 1983. These tickets are being redesigned to include clearer information about when they are valid. In the longer term, the government has stated an aspiration to withdraw these tickets once appropriate alternatives are in place such as ‘smart’ tickets. A smart ticket is an electronically stored ticket, often using a smartcard. Potentially, smart tickets allow much greater flexibility of the types of tickets, the range of fares and how they can be paid for or refunds received in the case of delays.

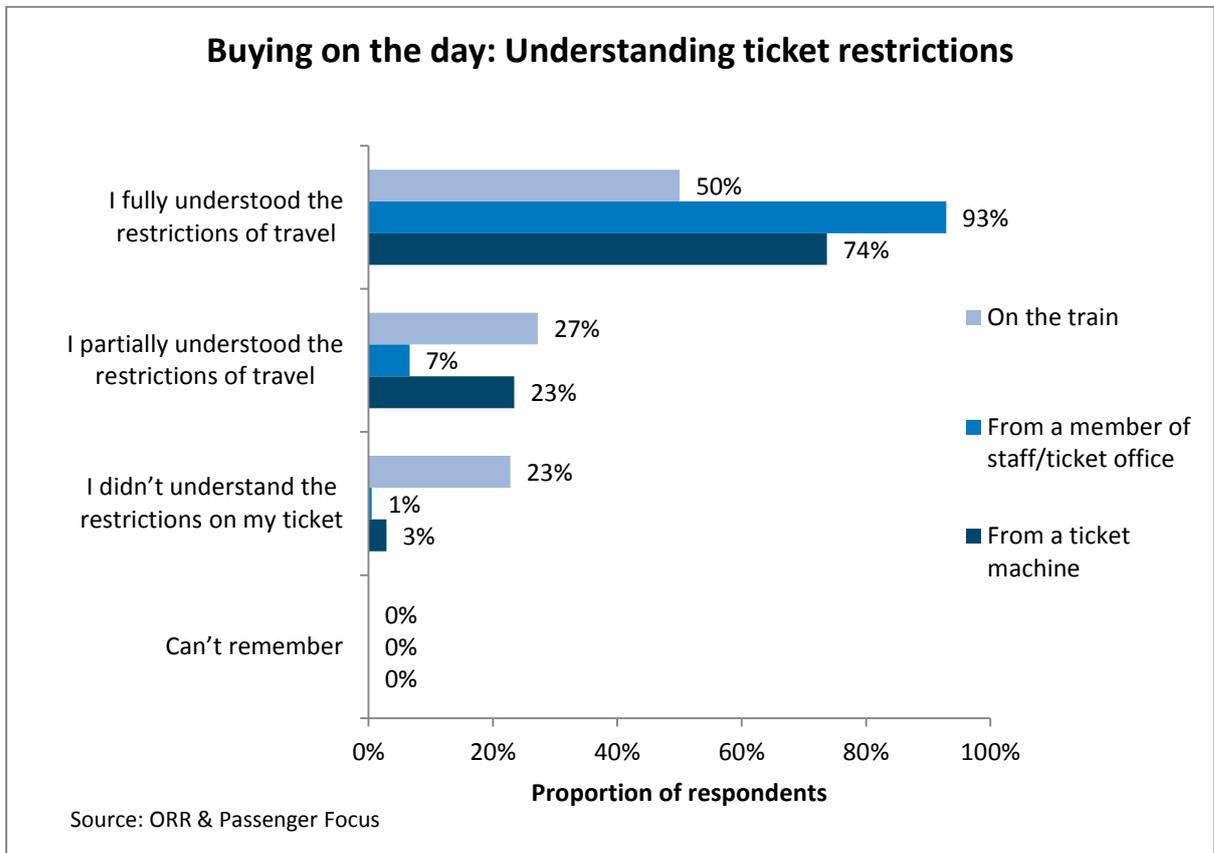
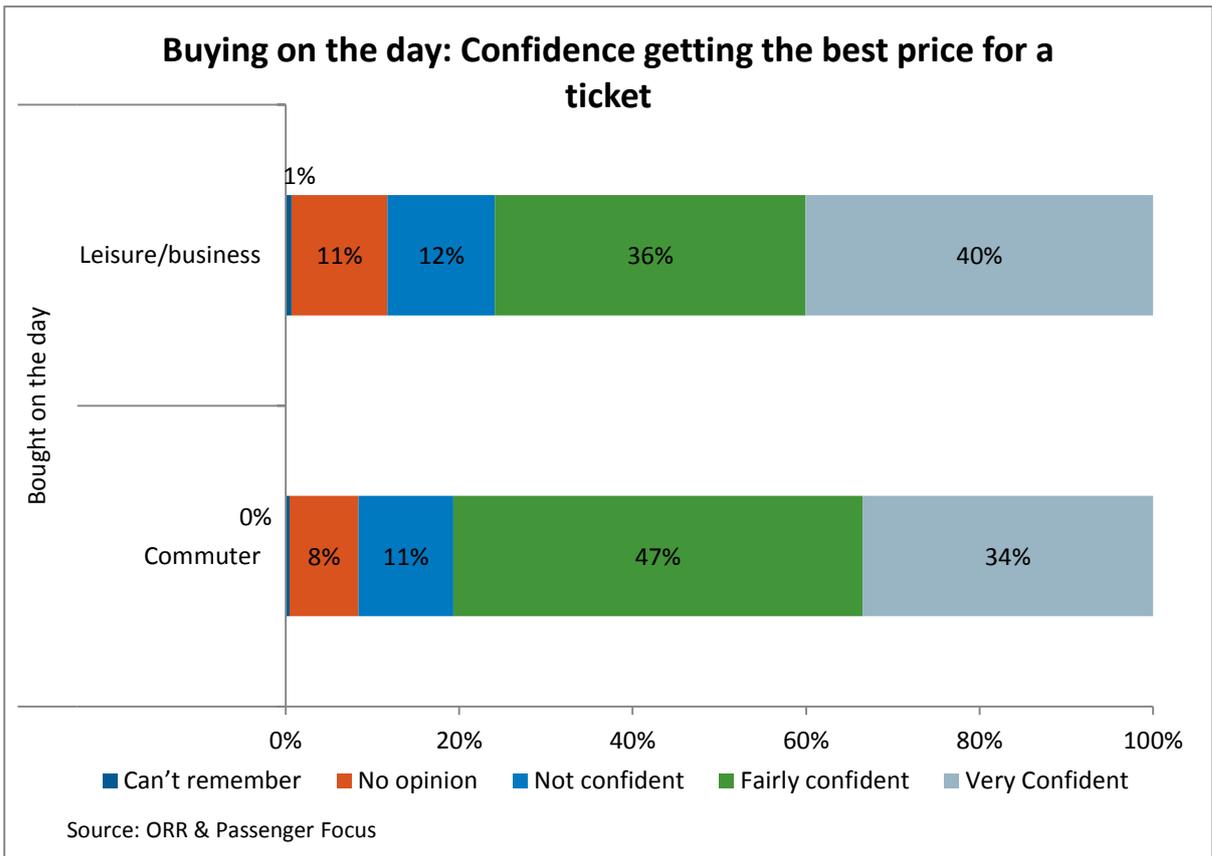
In the meantime, train operators have developed a range of other tickets that can be purchased online or via an App. Print-at-home tickets are a form of paper ticket that passengers download and can be presented to staff or read by a QR or bar-code scanner. M-tickets can be purchased via a mobile device, usually using an App, and are then downloaded to the device as an electronic ticket.

These innovations offer some clear benefits to passengers: convenience to buy and ‘collect’ the ticket and avoid queues. However, the adoption of these new ticket types has not been without problems, especially for print at home:

- Passengers have made mistakes, not understanding that an electronic record of the booking isn’t enough and that the print out of the ticket is required. Without a valid ticket you will usually have to pay again. Some TOCs, for example East Coast, are enabling conductors to scan ticket codes from electronic screens.
- Some limitations to passengers’ ability to amend or exchange tickets for use on a different service, unlike many tickets purchased from a ticket office or other channels. This is to protect the train operator from fraud.

## **New research**

- 4.29 Our quantitative survey found purchase habits similar to those reported in the NRPS. Nearly half of leisure/ business travellers that buy tickets on the day used a ticket office. Commuters are more likely to use TVMs. Younger people are much more likely to use TVMs than average, for example 64 per cent of under 25 year olds use TVMs.
- 4.30 Respondents to our quantitative survey were generally satisfied that the information to buy the correct ticket was displayed or provided to them. They were also confident they were able to get the best price and understood the restrictions (similar to responses from those that bought tickets in advance, see paragraph 3.35).



4.31 The confidence expressed in our quantitative survey is not reflected in participants' discussions during the qualitative research. When determining whether best value for the ticket had been obtained it was clear that some people found the fare structure complex or counter-intuitive. This was exacerbated where passengers did not have a clear reference or benchmark price against which to compare the rail fare (for example, because they travelled infrequently and are not sure of the typical price for the relevant journey). Together, these lead some people to perceive value for money as down to luck, rather than deliberate choices.

*"I travel around a lot going to football matches and when I talk to other passengers they always seem to have paid a lot less than me. I always seem to miss out"*

*[Infrequent, London]*

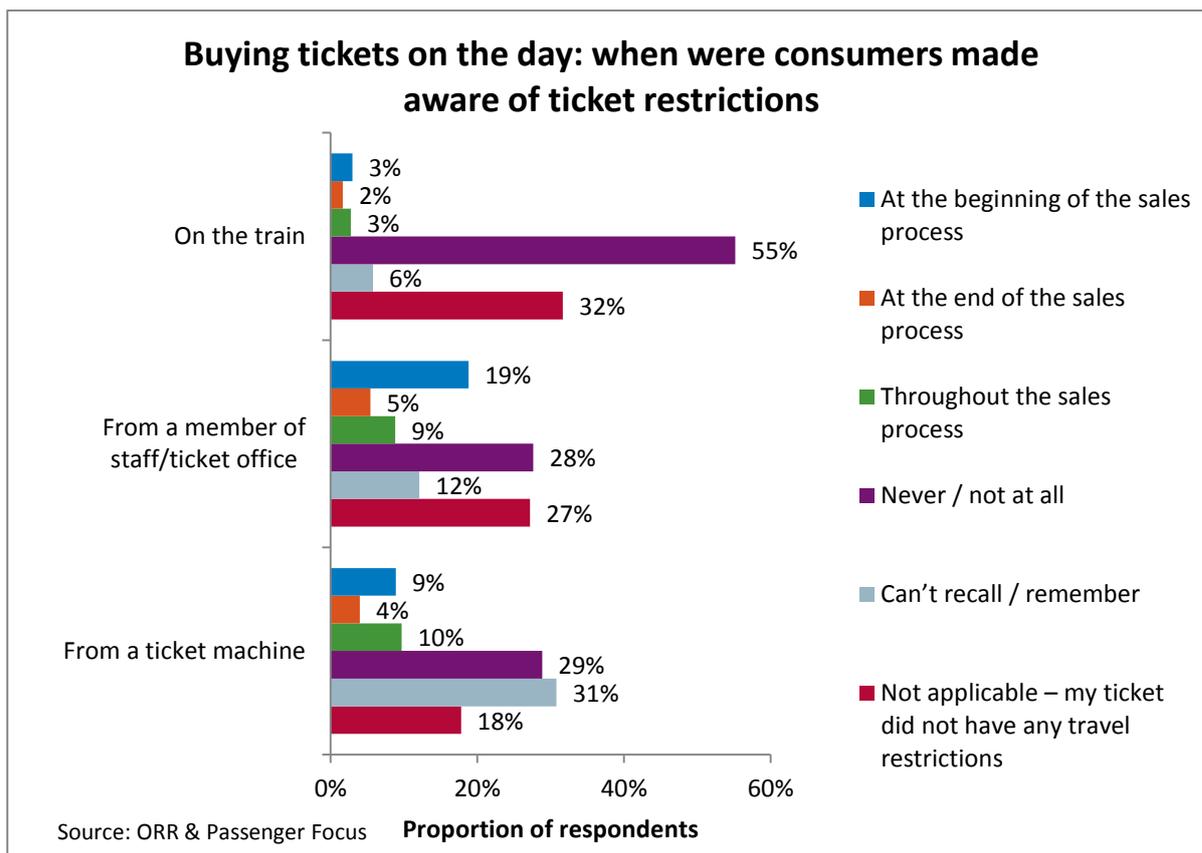
*"I travel to London a lot so I know the average price I pay for a ticket is about £27 so I use that to decide when to buy a ticket"* *[Infrequent, Birmingham]*

4.32 Most participants recognised that ticket restrictions were inflexible and needed to be understood properly before making a journey. However, participants had different levels of understanding of restrictions, such as peak-time restrictions, route options, pricing for single, return or split tickets. This affected peoples' confidence with securing the best value ticket.

*"There should be a summary at the end before you buy the ticket to show what ticket you are buying and what the restrictions are. You get a summary of the ticket but not the restrictions. That would make me feel more confident"* *[Infrequent, London]*

*"I am confident that I will always be able to plan a journey I want to make but not that I will always get the cheapest price available"* *[Infrequent, London]*

4.33 Our quantitative survey also found that passengers are not consistently made aware of ticket restrictions when purchasing on the day. Responses to this question indicate i) at least a quarter of passengers may not be informed of restrictions at all, ii) those using ticket offices are more likely to be informed of restrictions at the beginning of the sale, but only in 28 per cent of cases (including those informed throughout the sale) and iii) peoples' experience will vary markedly depending on the sales channel used.



4.34 The quantitative survey found that information about ticket restrictions and price satisfaction are closely linked. The point at which the passenger is made aware (if at all) of ticket restrictions has a direct effect on the level of confidence in achieving the best price for the ticket. The people who were least confident of whether they thought they achieved the best price were also the people who were not made aware of the restrictions of their ticket. Furthermore, confidence is not only influenced by awareness of ticket restrictions, but also by understanding such restrictions. Those who fully understood the ticket restrictions were much more likely to be confident in thinking they have achieved best price for the ticket. The converse is also true, in that passengers who did not understand ticket restrictions had very low confidence.

## On the train

4.35 The service passengers buy is all about getting from A to B, on time and in reasonable comfort. Passenger Focus has found that punctuality and reliability is the main driver of rail passenger (dis)satisfaction.<sup>25</sup> This section is organised as follows:

<sup>25</sup> National Rail Passenger Survey - Spring 2013 - NRPS - Multivariate Analysis Report, August 2013, Passenger Focus (<http://www.passengerfocus.org.uk/research/publications/national-passenger-survey-spring-2013-NRPS-multivariate-analysis-report>).

- (a) previous research – summarises the evidence of train performance (punctuality and cancellations) based on industry data collected by ORR and published research on disabled peoples' access to trains; and
- (b) National Rail Passenger Survey – summarises passengers' satisfaction with punctuality, the information supplied once aboard the train, comfort and the extent that services satisfy the needs of disabled passengers.

## Previous research

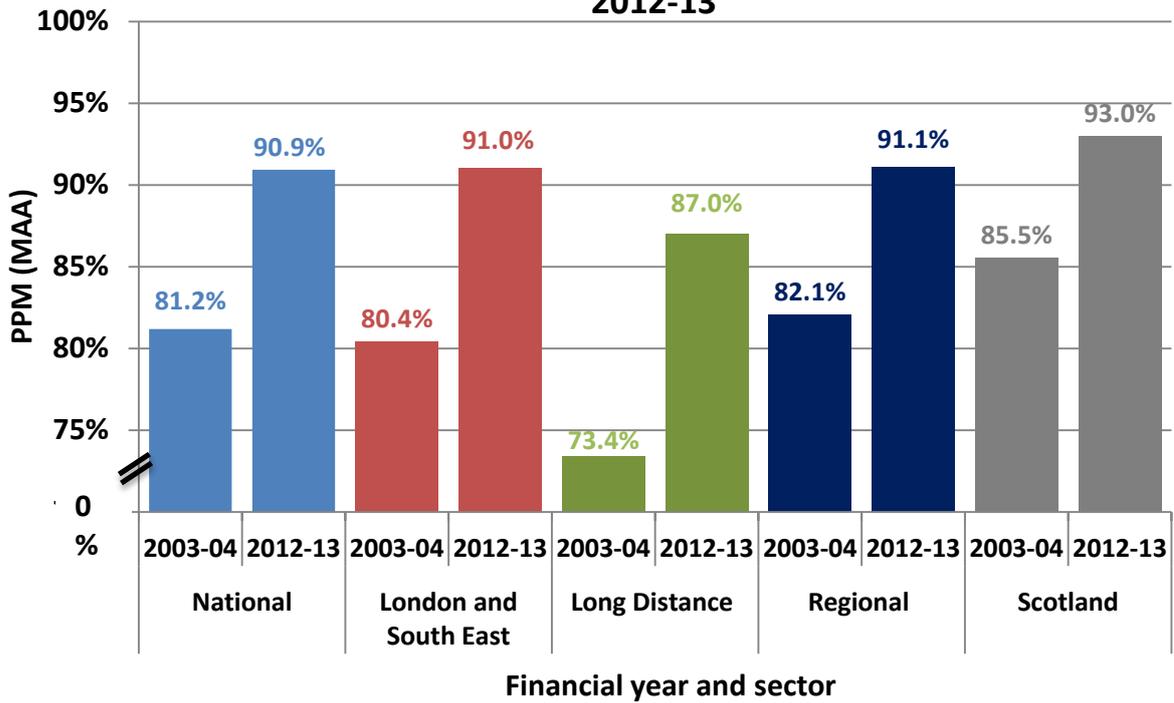
### Punctuality

- 4.36 The main performance measures for Britain's railways are PPM and CaSL (see paragraph 2.20). All rail sectors have seen an improvement in punctuality. Nationally, average punctuality has improved by nearly 10 percentage points in the last nine years, with 90.9 per cent of all trains now arriving within 5 or 10 minutes. However, despite historic improvements to rail performance (i.e. punctuality) not all regulated targets have been met since 2010-11, specifically in the long distance and London & South-East sectors.<sup>26</sup>
- 4.37 The ORR has also published data on the percentage of trains arriving within one minute of their timetabled destination time (termed 'right time'). This measure more closely reflects the experience and perceptions of passengers (in particular commuters) that are more time sensitive. At the end of 2012-13 the national average was 68.1 per cent. This is 23 percentage points worse than the PPM measure. Overall, trains are more punctual than 9 years ago with a greater proportion arriving within a minute of their schedule time.
- 4.38 ORR monitors and sets targets for the proportions of trains cancelled or significantly late (more than 30 minutes), termed CaSL. This gives an indication of reliability. The CaSL figures have improved over time, with fewer trains very late or cancelled, especially for the long distance sector. CaSL targets complement PPM targets to ensure very late services are not 'written off' to protect punctuality targets, as passengers can face significant adversity with serious delays (see Box 4.5).

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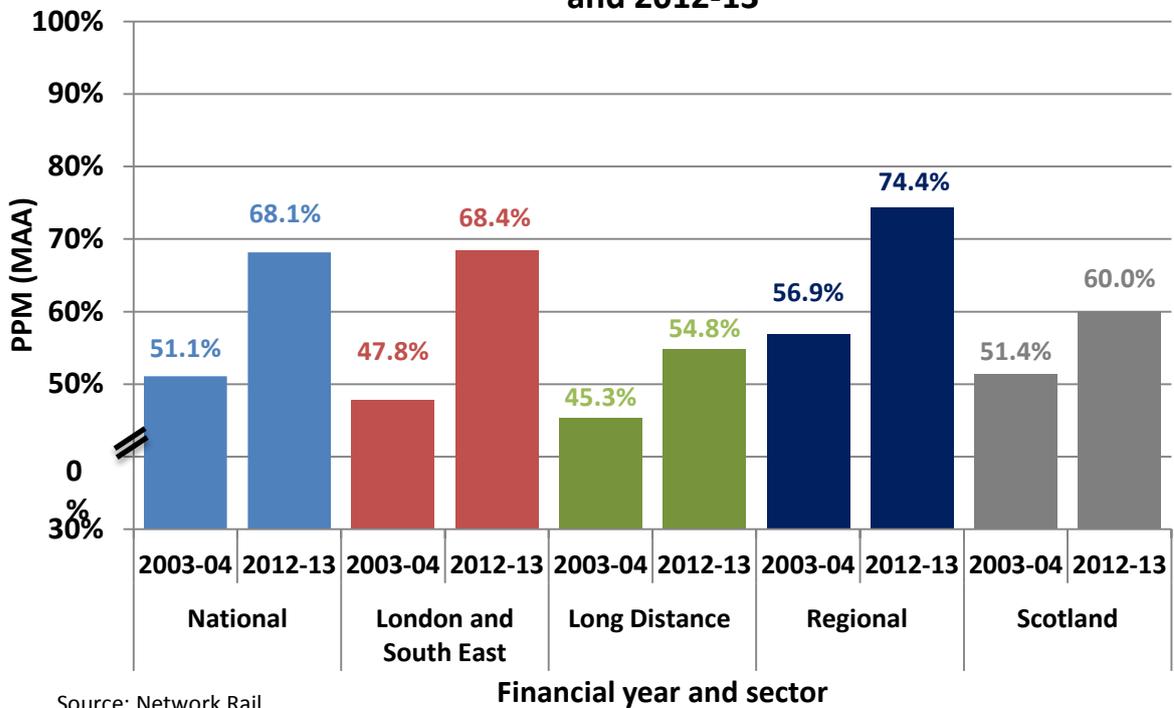
<sup>26</sup> For details of PPM and CaSL performance, see ORR's *Network Rail Monitor* (<http://www.rail-reg.gov.uk/server/show/nav.293>).

### PPM MAA - National, Sector and Scotland - 2003-04 and 2012-13

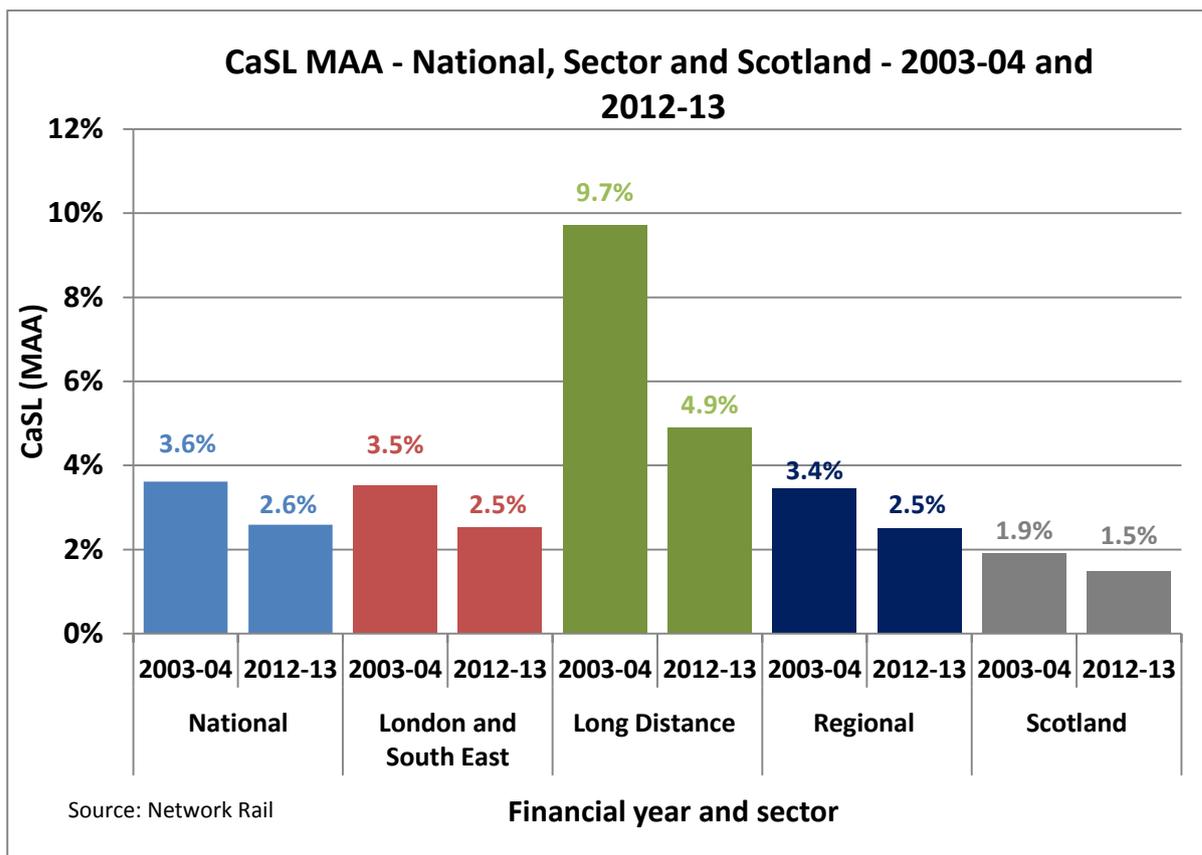


Source: Network Rail

### Right Time MAA - National, Sector and Scotland - 2003-04 and 2012-13



Source: Network Rail



### Physical access to trains

4.39 Passenger Focus, in its mystery shopping of Passenger Assist, found 91 per cent of mystery shoppers considered boarding to be ‘very or quite easy’.<sup>27</sup> Similarly, help from staff (at the station or on board the train) was rated as ‘excellent or pretty good’ on 85 per cent of occasions. On 3 per cent of occasions staff did not offer assistance. Alighting from the trains was also rated at 85 per cent, but on 2 per cent of occasions the mystery shopper was unable to get off the train at all.

<sup>27</sup> *Assisted Passenger Reservation System*, January 2011, Passenger Focus.

### **Box 4.3 – Train crowding information and the response of passengers**

Crowding on trains can be inconvenient and uncomfortable. To help passengers plan their journey and travel more comfortably London Midland have been publishing information on which trains have spare seats from a number of their busiest stations.<sup>28</sup>

In July 2012, the ORR published a report that looked at the impact that more information on seat availability had on passenger behaviour.<sup>29</sup> Working with South West Trains (SWT), we published posters similar to London Midland's at five selected SWT stations between November 2011 and February 2012. We then asked passengers whether they had seen the crowding information, found it useful and whether it changed their behaviours.

The top level results showed that just over a third of those questioned had seen the crowding information. Of those people a fifth had regularly or occasionally changed the trains they got as a result of the information published. Analysis of the South West Trains loading data also suggested that there may have been some limited changes to loading patterns, possibly as a result of the posters.

Since the report has been published we have been encouraging train operators to publish more information on seat availability to help customers make an informed decision about the train they catch. The DfT also announced that Transport Minister had written to every TOC urging them to publish more information on overcrowding, using the 'simple traffic light system' adopted by London Midland.

## **National Rail Passenger Survey**

4.40 The NRPS captures a significant amount of information on satisfaction with train services. Overall measures of satisfaction tend to follow improvements to punctuality (see paragraph 2.22). Here we focus on three aspects of train performance: punctuality and reliability of the train; the quality of information provided to passengers on the train; and comfort. Comfort is measured by four factors: comfort of seating, sufficient room to sit, cleanliness of the train and personal security.<sup>30</sup> In addition, we consider the responses to the NRPS from disabled passengers, and the extent to which trains meets their needs.

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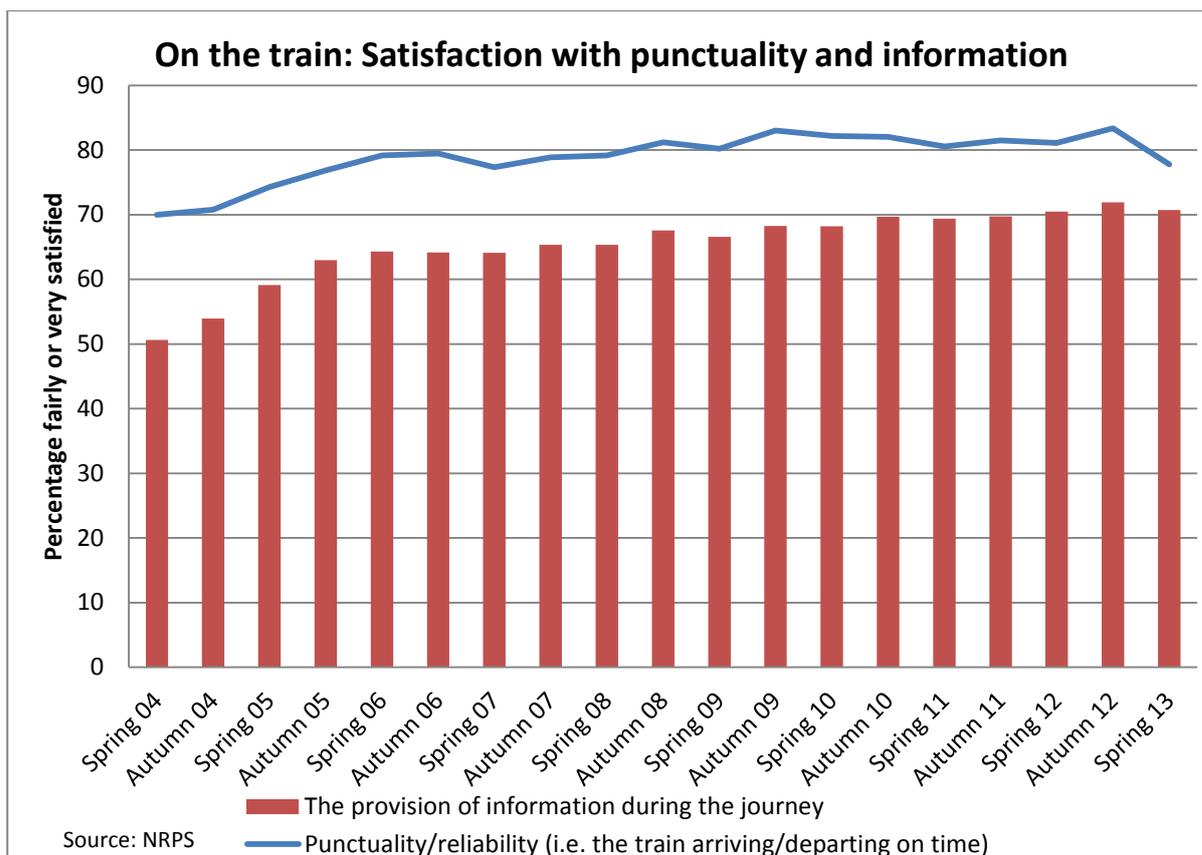
<sup>28</sup> <http://www.londonmidland.com/your-journey/finding-a-seat/#fewer-seats>

<sup>29</sup> <http://www.rail-reg.gov.uk/upload/pdf/swt-crowding-data-research.pdf>

<sup>30</sup> Multivariate analysis of the NRPS survey has found these four factors to be important drivers of satisfaction with train services (National Rail Passenger Survey - Spring 2013 - NRPS - Multivariate Analysis Report, August 2013, Passenger Focus).

## Punctuality / reliability and information

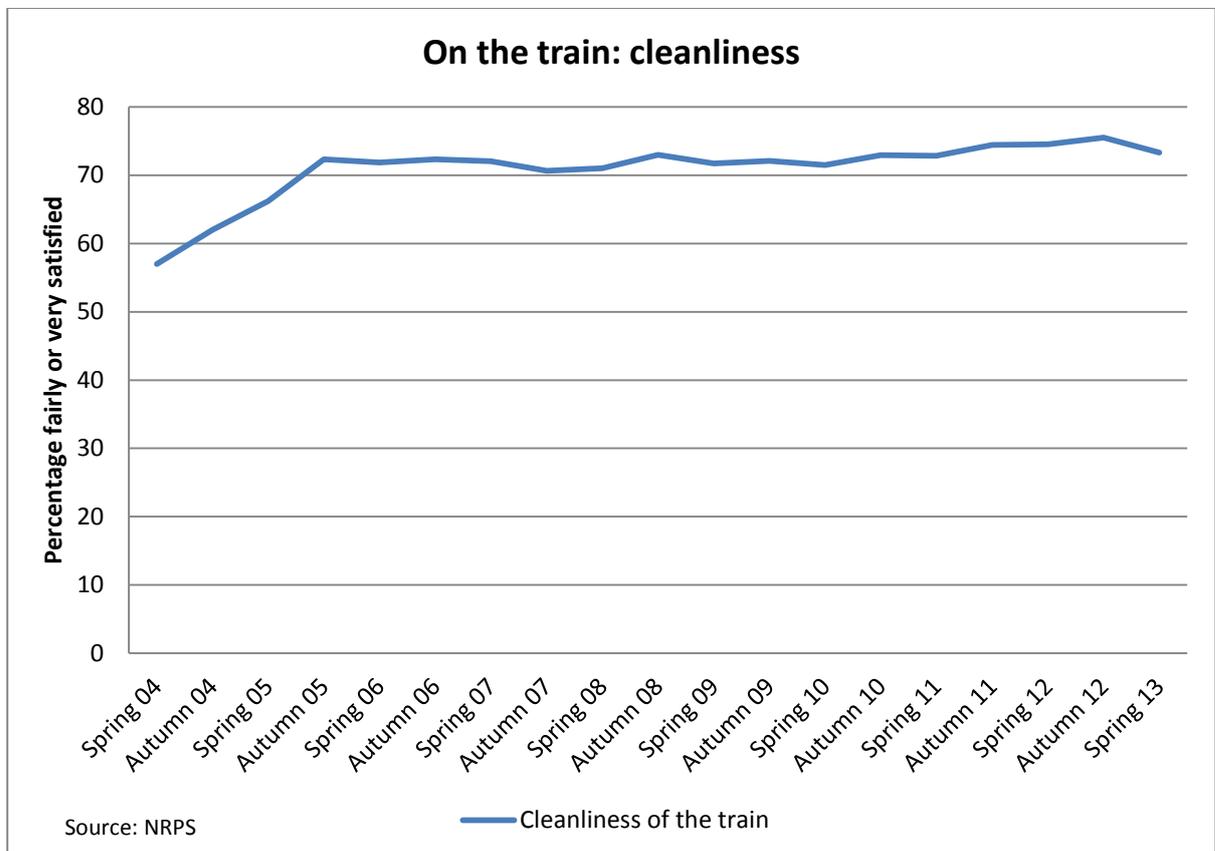
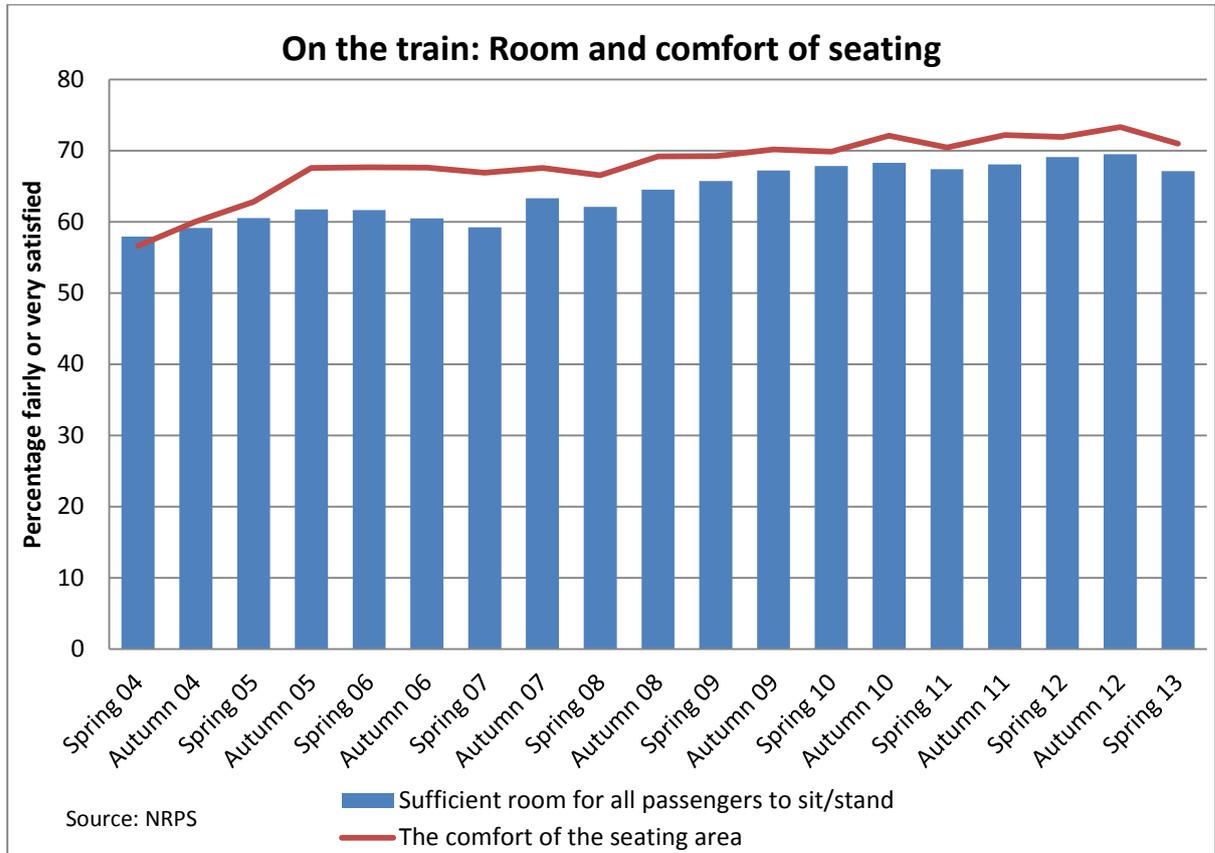
- 4.41 Trains must run on time to fulfil their most basic role. Since 2004 satisfaction with punctuality has improved from 70 per cent satisfaction rising to around 80 per cent from 2006 but falling (to 78 per cent) in the Spring 2013 survey. Those traveling by rail most frequently have been more critical, with a persistent satisfaction gap between frequent and infrequent users (see Annex A).
- 4.42 Satisfaction with the information provided on board trains is now just over 70 per cent and has improved significantly since 2004 (from 51 per cent), but lags behind the overall NRPS satisfaction score.



## Comfort

- 4.43 The NRPS asks a number of questions of passengers to rate the comfort of the journey. A key element is the extent to which trains are crowded (see Box 4.3 above). Passengers are asked to rate how well the train performs in respect of sufficient room to sit or stand and the comfort of the seating area. Both of these measures perform worse than the overall NRPS satisfaction score. Sixty seven per cent of passengers were satisfied with the room to sit or stand, rising from 58 per cent in 2004. Ratings for comfort of seating have risen by 11 per cent (to 71 per cent). Cleanliness of trains improved steadily to the end of 2005, but since has remained static at just over 70 per cent satisfaction. We have also considered whether these results systematically vary for any particular group of passengers, for example by age or those travelling with children (see Annex A). Broadly, older people and those travelling less often by rail

are more satisfied with the service they receive. Other groups, for example disabled people or those travelling with children, hold views similar to the overall results.



4.44 Personal security on board trains is an important contributor to overall comfort and the majority (77 per cent) are satisfied with this. For disabled passengers there is an indication of a persistent gap between satisfaction scores. Until about 2010 disabled passengers' views closely matched that of passengers overall. Since then a small (5 per cent) but persistent gap in satisfaction has arisen.

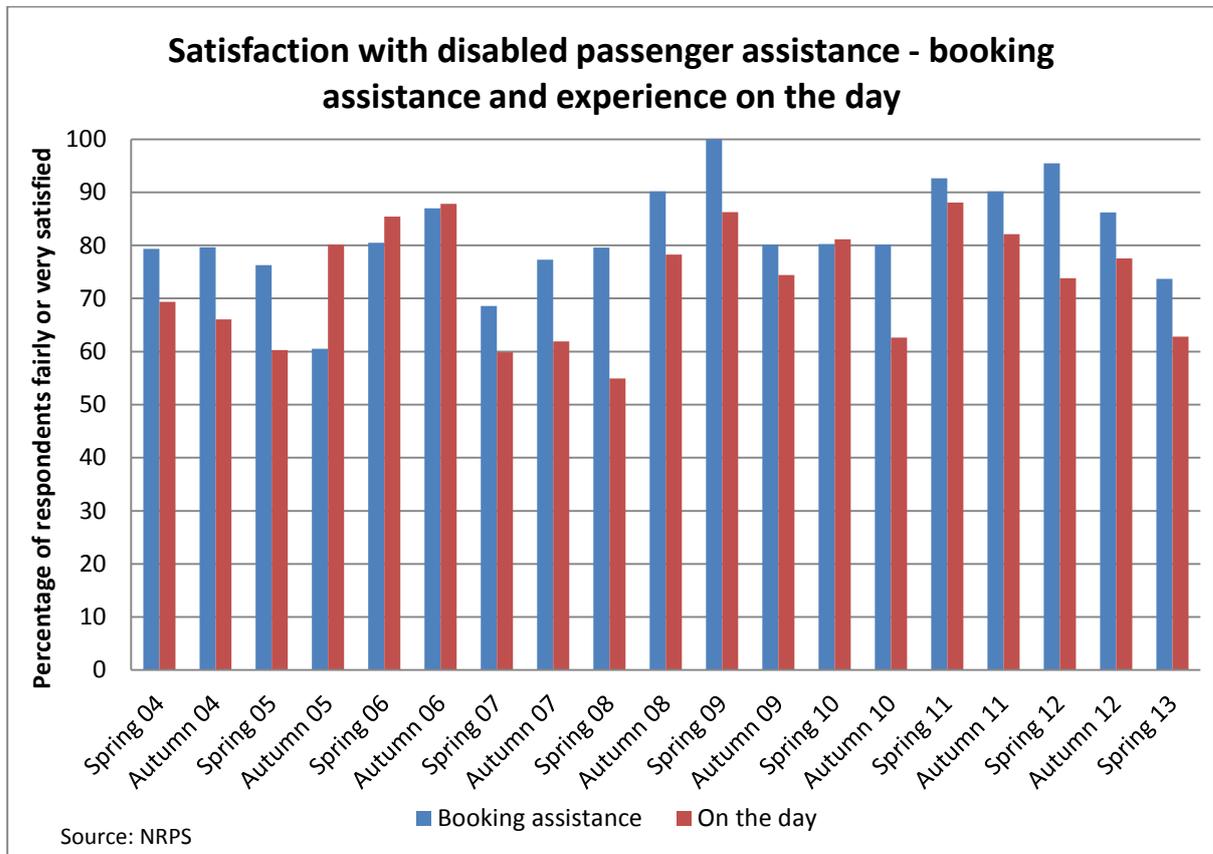


### Meeting disabled passengers' needs

4.45 Disabled passengers have a wide range of additional or specific needs to be met to help ensure an easy, high-quality rail journey. A very small number of NRPS respondents (approximately 25 people in the latest Spring 2013 survey) used Passenger Assist.<sup>31</sup> Satisfaction with booking assistance is rated relatively high, at over 70 per cent, just below views from previous mystery shopping of Passenger Assist (see paragraph 3.18 above). The experience of assistance on the day of travel is less favourable. Although responses vary over the last nine years, from a high of 88 per cent to a low of 55 per cent, ratings tends to lag behind the experience of booking assistance. This variation in experience is matched in the broader satisfaction questions asked of all disabled rail users: the Spring 2013 satisfaction

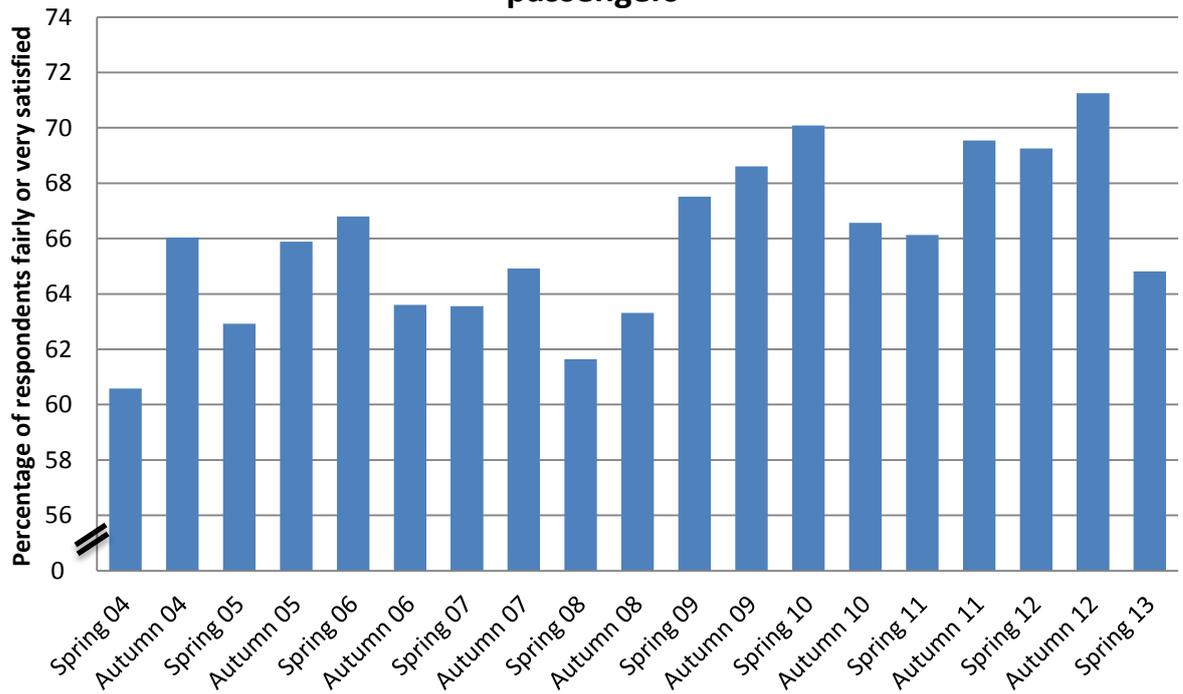
<sup>31</sup> Looking at the views of people using Passenger Assist since 2004 we can see a wide variation in ratings from year to year. Part of this can be explained by the small sample size. Nevertheless, the NRPS provides important evidence of how well Passenger Assist is meeting peoples' needs.

score (at 65 per cent) is a 4 percentage points lower than the Spring 2012 results.<sup>32</sup> Historically, there has been a gradual upward trend in satisfaction by disabled passengers, but with some variation year to year.



<sup>32</sup> The sample size for this question is circa 3000 respondents, based on the combined Autumn 2012 and Spring 2013 surveys.

### Satisfaction with trains meeting the needs of disabled passengers



Source: NRPS

#### **Box 4.4 – Passenger information and safety**

The ORR is the safety regulator of the rail industry. Our aim is for zero workforce and industry-caused passenger fatalities, and an ever-decreasing overall risk to safety for all those affected by rail (workers, passengers and the general public). We consider that a safe railway is an efficient railway, and good passenger outcomes support a safer railway.

The ORR recently fined First Capital Connect (FCC) £75,000 following a prosecution after the company failed to protect the safety of passengers trapped on a broken down train at Dock Junction, London, in May 2011.

During the evening rush hour on 26 May 2011, an FCC service from Brighton to Bedford lost power and became stranded for approximately three hours, with around 700 passengers on board, at Dock Junction between St Pancras International and Kentish Town stations in North London. ORR's investigation found that FCC had not adequately planned its response to deal with stranded trains or provided those on board with accurate information, working ventilation or toilet facilities.

Passengers were forced to call National Rail Enquiries for updates and throughout the three hour period were repeatedly informed a rescue train would be arriving in ten minutes. Inaccurate passenger information updates and poor conditions on board resulted in many passengers opening the doors and leaving the train.

The risk of passengers taking independent action to leave the train in conditions such as these had already been recognised by the rail industry. FCC failed to act on relevant guidance developed after previous incidents of stranded trains. FCC pleaded guilty to a charge under section 3(1) of the Health and Safety at Work Act 1974.

ORR's prosecution of FCC sends a clear message that accurate and timely passenger information is essential not only for those planning journeys but, as this incident demonstrates, for the safe running of the railways.

## **Managing delays and disruption**

- 4.46 From time to time, trains will be delayed. This can be very frustrating to passengers. Overall, the ORR requires more than 9 in 10 trains to run on time, and despite recent concerns with performance this target is broadly met. When a delay does occur, passengers are dependent upon the train operator to keep them well informed, to resolve the situation promptly or supply advice and the means to complete their journey or change travel plans. This section is organised as follows:

- (a) previous research – summarises data on the incidence and duration of delays, based on industry data collected by ORR and previous published research investigation the passengers’ experience during disruption;
- (b) National Rail Passenger Survey – summarises passengers’ satisfaction with how well train operators manage delays; and
- (c) new research – presents the quantitative survey results and qualitative research into passenger habits when checking information before starting the journey and the sources and usefulness of information about delays at the station or on the train.

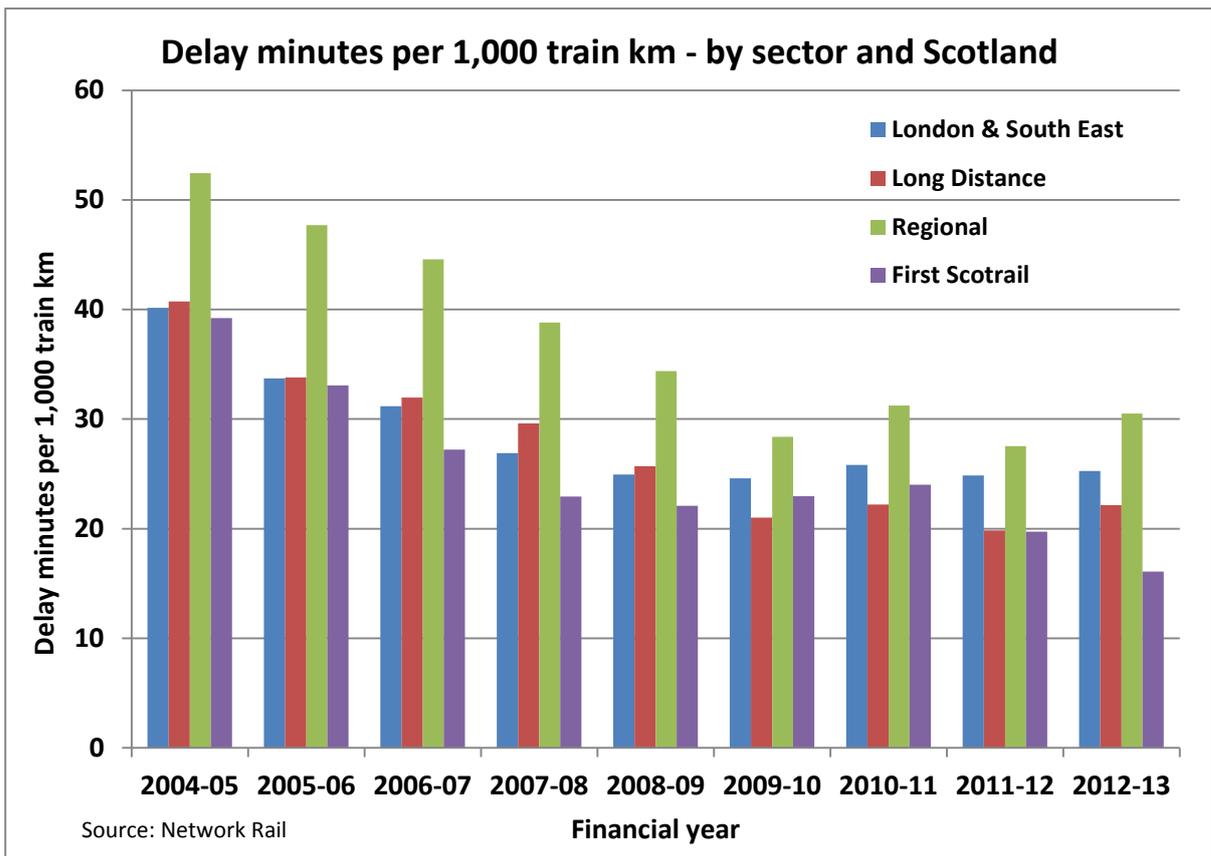
## Previous research

### Measuring delays

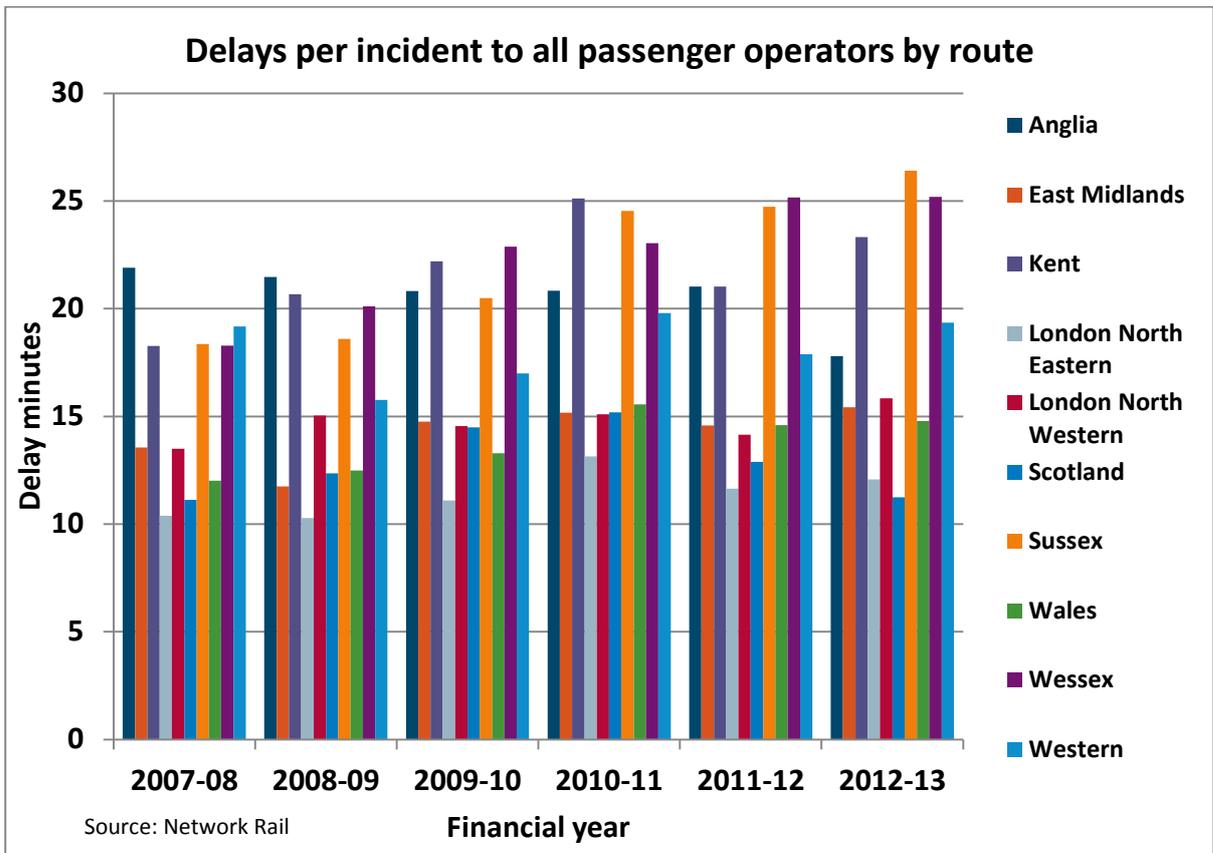
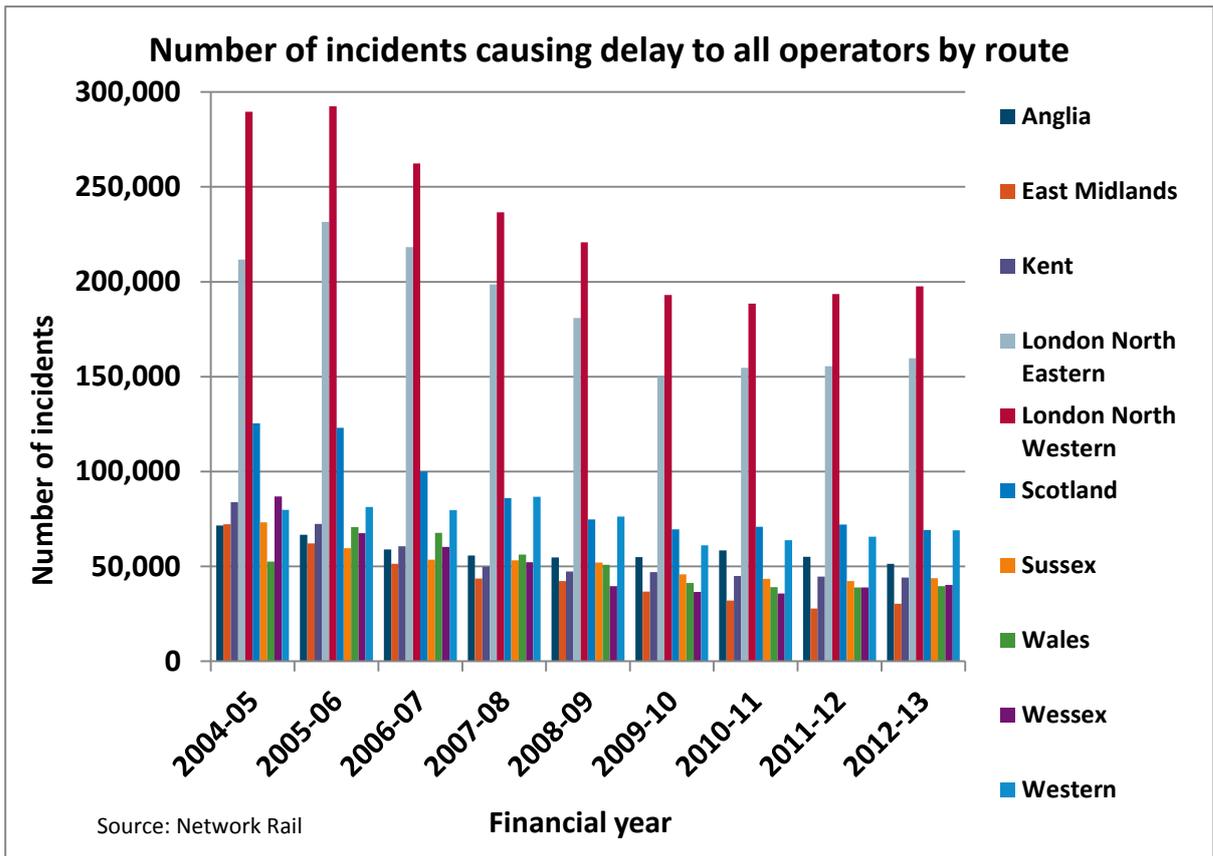
- 4.47 As seen above punctuality and reliability has improved in most years over the last decade. The ORR monitors the length and incidence of delays using two measures. First, the total minutes lost due to delays (‘delay minutes’). Second, the number of actual incidents that resulted in a delay. From this the average length of a delay can be calculated (‘delay per incident’). This data is set out below.<sup>33</sup>
- 4.48 Since 2004, the minutes lost to delays (per 1000 train km) has fallen for every sector, albeit from 2010-11 the rate of improvement fell for London & South East and Long Distance. Performance in these two sectors is now similar to levels in 2009-10.

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<sup>33</sup> This data is collected in a number of ways, which means that some data is measured by ‘sector’ and other by ‘Network Rail Route’. Direct comparison of this data is not possible. But, interpreted carefully, the data gives a broad indication of the pattern of delays.



4.49 The falling number of delay minutes lost is also reflected in a reduction in the number of incidents that cause delay (measured by Network Rail route). The London commuter routes still show the most significant number of incidents, but these fell significantly from 2004-05 to 2009-10. However, the duration of any particular delay has been increasing (as measured by 'delay per incident'). So, although fewer delay minutes are lost overall compared to five years ago, and fewer incidents occur, it is taking longer to resolve a delay and / or each delay causes greater knock-on effects to other services or parts of the network.



## Passenger experience of disruption

- 4.50 Whenever a delay occurs passengers are adversely affected. Individual incidents or very poor weather causing delays attracts significant media attention. The resilience of the UK's transport system has focused attention on the operational management and investments made to support services during winter periods.<sup>34</sup> In addition, Passenger Focus has investigated the needs of passengers during disruptions.
- 4.51 Passenger Focus' research in 2010 found passengers' perceived that rail delays or disruptions were treated principally as 'logistical challenges'. Too little attention was paid to the needs or experience of passengers during delays.<sup>35</sup> The research focused on two issues. First, whether the railway supplied accurate and co-ordinated information to passengers. Second, the quality of engagement with passengers, either ensuring people were informed of delays before arriving at the station or providing the advice or information necessary to complete their journey.
- 4.52 Subsequent research by Passenger Focus explored what the information needs of passengers are during delays or disruption.<sup>36</sup> The research found that information to passengers should be timely, consistent and accurate. Train operators or station staff needed to:
- (a) give accurate information about the length of delay;
  - (b) give reasons for the delay; and
  - (c) offer advice and information on the alternative routes that could be used.
- 4.53 Social media, in particular Twitter, is now offering greater scope for operators to quickly and accurately communicate information during disruption. Passenger Focus' research found that passengers' viewed social media as a useful complement to existing information channels, as long as it remained accurate and ideally targeted on information of immediate relevance to passengers.<sup>37</sup>

## National Rail Passenger Survey

- 4.54 The in-depth research into the quality of peoples' experience during delays was triggered by persistently poor results from the NRPS. Over the last decade, satisfaction with how well train operators deal with delays has risen by 9 per cent but remains at 38 per cent in total (compared to 82 per cent for overall satisfaction in spring 2013). The time taken to resolve delays and the usefulness of information both rate poorly in the NRPS (at 37% and 47% respectively for spring 2013). As with other

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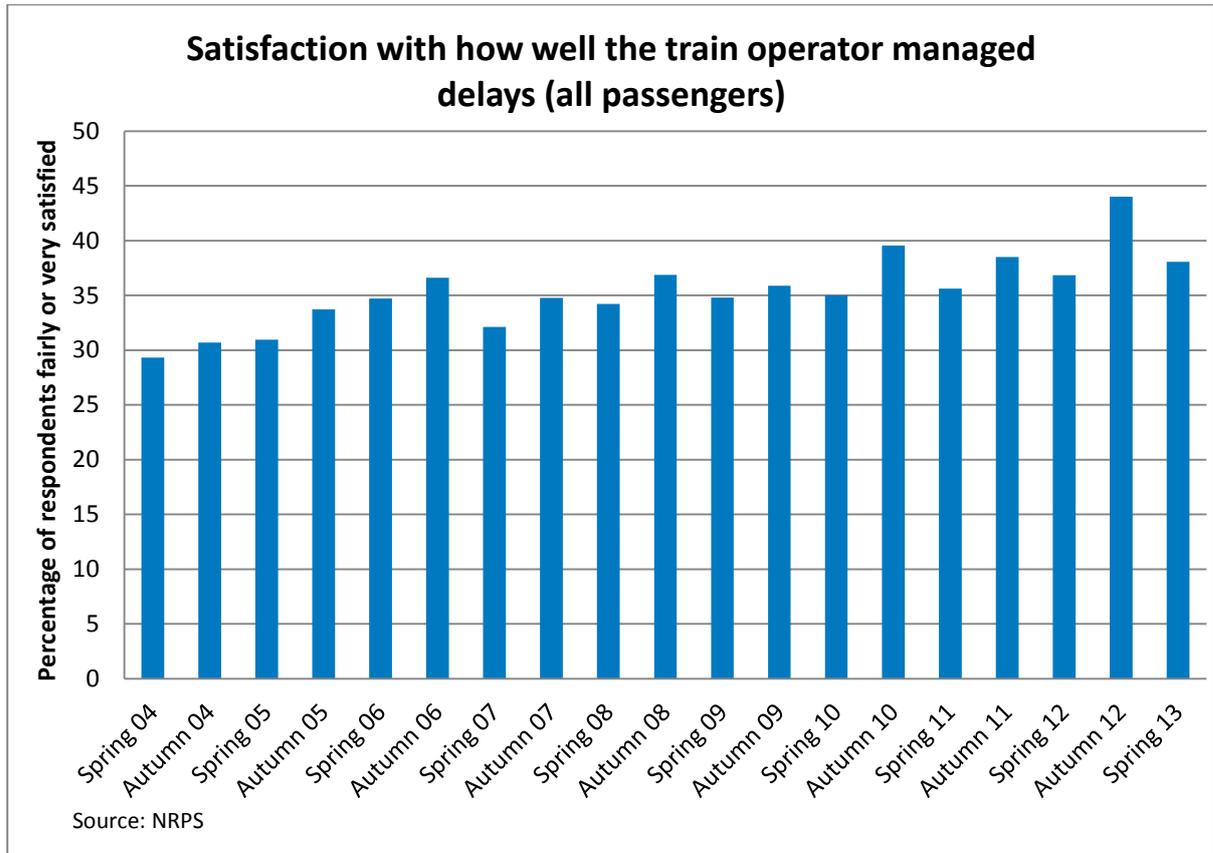
<sup>34</sup> See the Quarmby report *The Resilience of England's Transport Systems in Winter, An Independent Review*, Final Report, October 2010, DfT.

<sup>35</sup> *Delays and Disruption - Rail passenger have their say*, 2010, Passenger Focus.

<sup>36</sup> *Rail Passengers experiences of the snow*, 2011 and *Information: rail passengers' needs during unplanned disruption*, 2011, Passenger Focus.

<sup>37</sup> *Short and tweet, how passengers want social media during disruption*, June 2012, Passenger Focus.

NRPS findings, those that travel by rail frequently are least satisfied with how delays are handled.

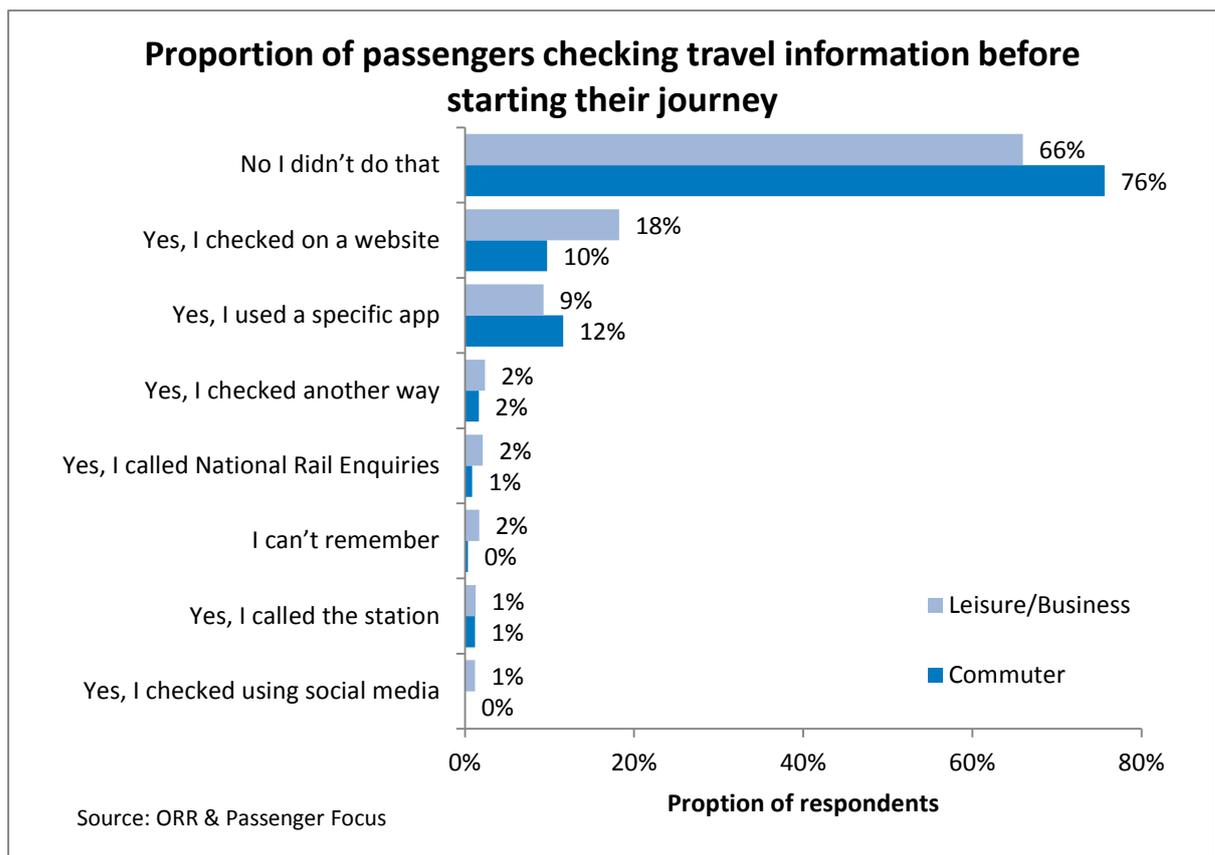


## New research

4.55 Our quantitative survey and qualitative research asked people to consider their habits for checking train punctuality and, if they had been delayed, the extent to which they were kept well informed. About 1 in 7 respondents to our quantitative survey had been affected by a delay on their journey.

### Travel information before starting a journey

4.56 About one third of leisure/ business passengers and one quarter of commuters check for delays or disruption before setting off on their journey. Commuters favour apps, with websites used more by leisure/ business passengers.



4.57 Our qualitative research confirmed common use of apps or other online sources to check travel information before starting a journey. Respondents considered that early warning of delays allowed them to alter travel plans, which is potentially easier to do if still at home. Some people habitually check travel information, others only in response to prompts such as poor weather. Some respondents checked for engineering works to ensure rail services were operating or that they had not been replaced by buses.

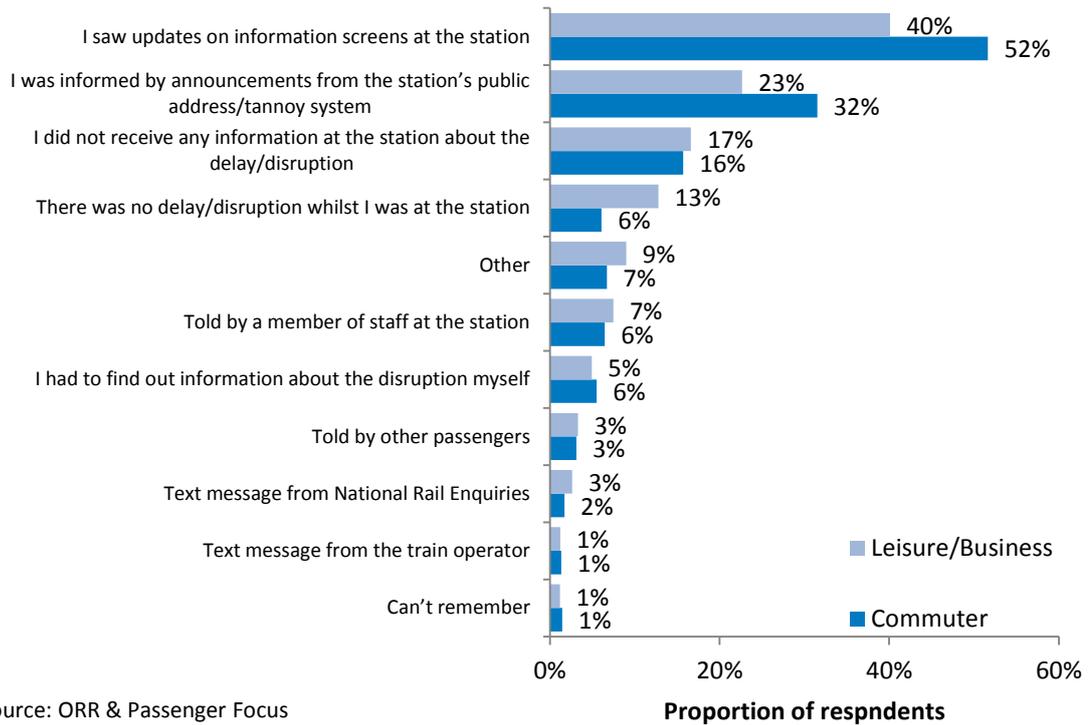
*“I always check the App that tells me where the train is on the actual line; it’s a green dot on the line and it’s a live update” [Frequent, Manchester]*

*“I always look out for engineering works because I hate it when there is a bus replacement service so I will avoid travelling or go by another mode” [Frequent, London]*

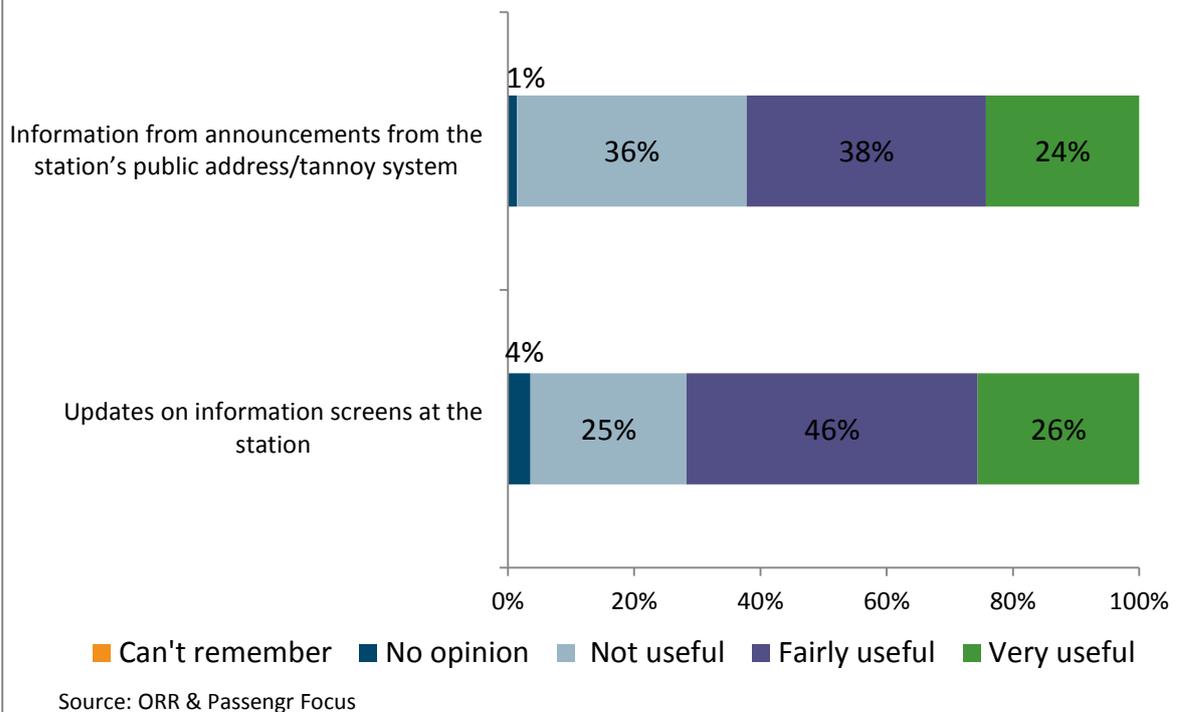
### Information about delays at the station and on the train

4.58 Passengers at the station receive information from a wide range of sources. Display screens at stations and public announcements remain the principal channels relied upon by passengers. Our quantitative survey found that a significant minority of passengers (up to 17%) had not been informed of service disruption at the station (which may be because the disruption to the journey had not yet occurred during their specific journey). A significant minority that did receive information from public announcements or display screens did not find the information useful to help manage the delay. This research did not explore why this was the case.

### At the station: Passenger information about delays

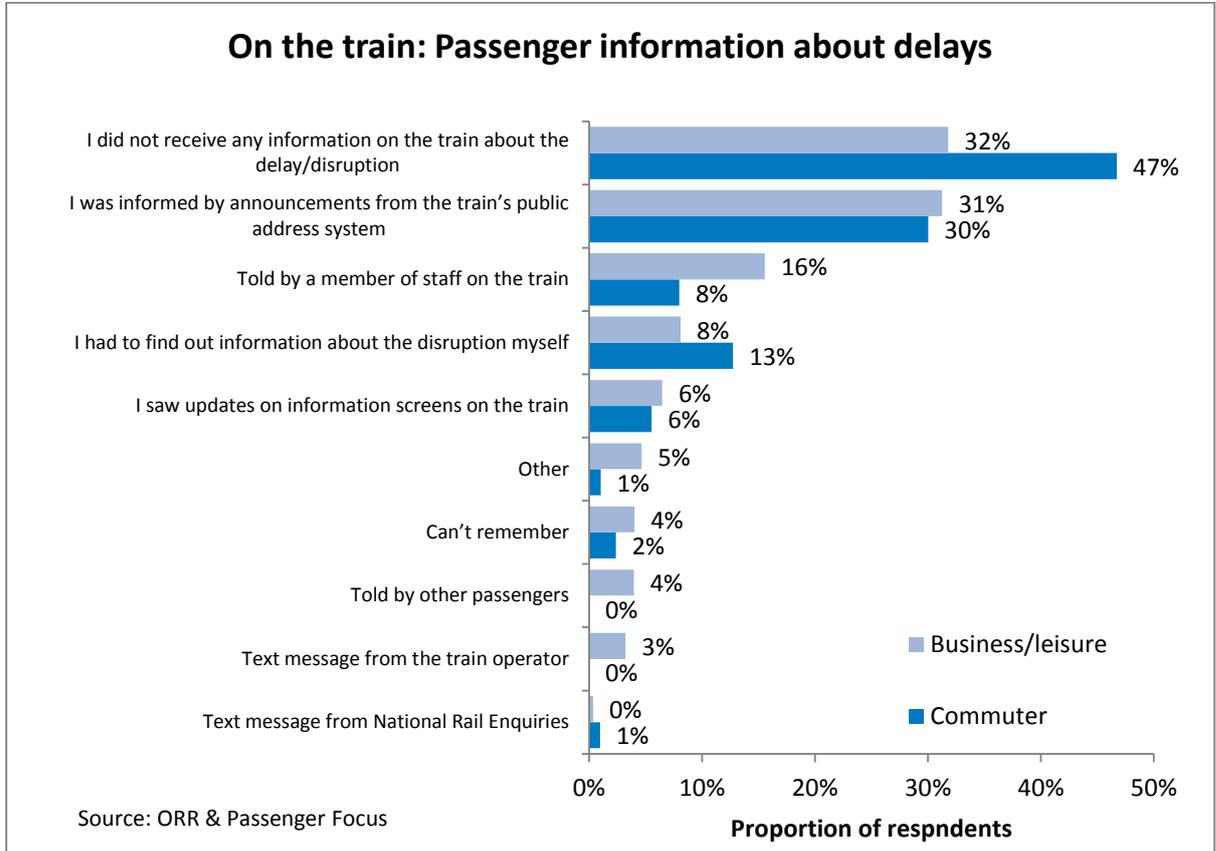


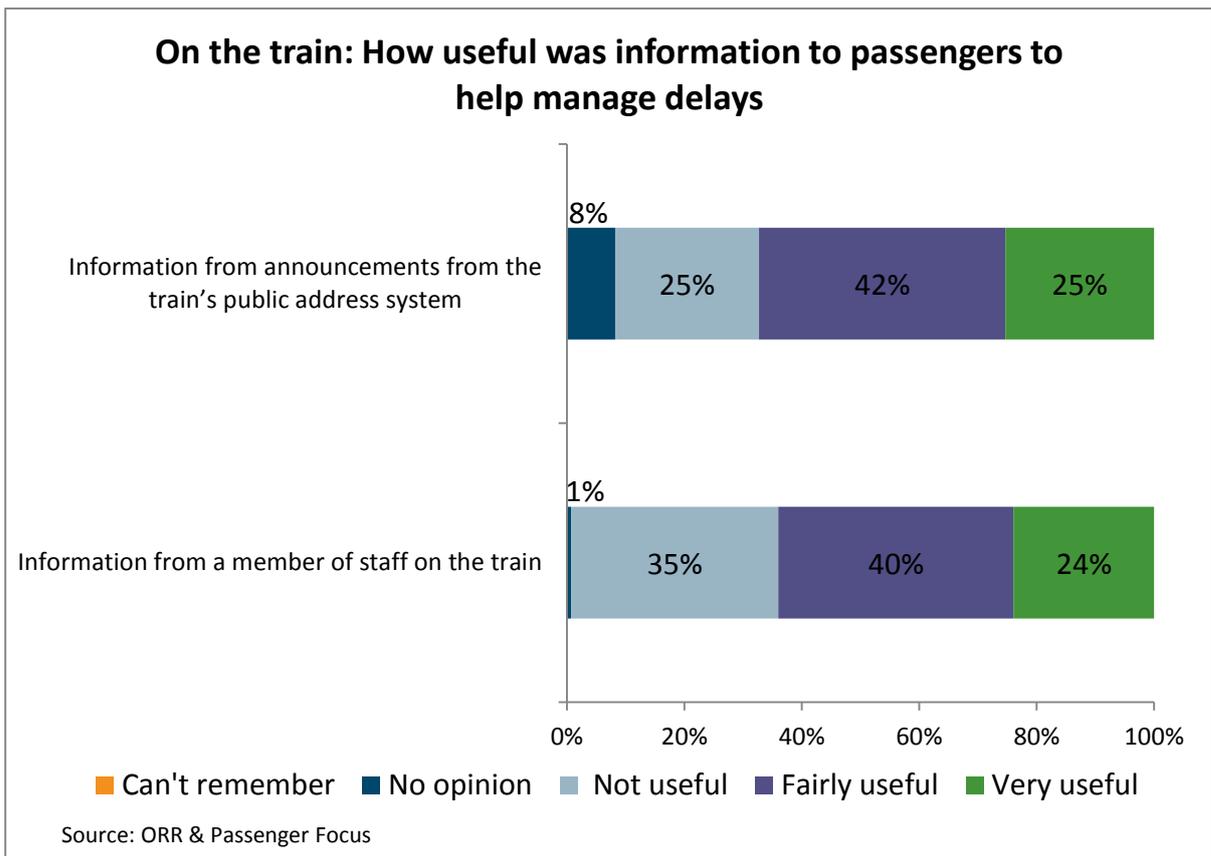
### At the station: How useful was information to passengers to help manage delays



4.59 The quantitative survey for information about delays received on the train show a reliance on traditional channels of information, in particular public announcements.

However, a third of leisure/ business travellers and nearly half of commuters state that they received no information about the delay whilst on the train. About 1 in 10 respondents state they had to find out about the delay themselves. A significant minority found the information they received was not useful to help them manage the delay.





4.60 The discussion by participants during the qualitative research confirmed that traditional information channels remain important. Participants expect that station or train staff should be providing the information needed if a service is delayed. apps, and to some extent social media, are considered as complements to the essential official sources of information. Some respondents considered that information supplied by different sources can be inconsistent, with a view that staff, display screens and passengers may not have access to the same set of high quality information.

*“There are regular problems when I am commuting. The boards don’t link up with what is happening on the platforms and it is just murder and really frustrating”*  
*[Infrequent, London]*

#### **Box 4.5 – East Coast passenger disruption February 2013**

Information for passengers and awareness of their rights are key to enable them to make informed decisions about their journeys. There are conditions in TOC passenger licences (regulated by ORR) and franchise agreements (regulated by Department for Transport) setting out standards for passenger information and, through the National Conditions of Carriage, the treatment of passengers during significant disruption. However, incidents causing significant inconvenience to passengers continue to arise from time to time and lessons must be learnt and acted on.

On the late evening of 19th February 2013 the East Coast Mainline was disrupted due to an empty train hitting some damaged overhead wire in the St Neots area, Bedfordshire. This incident affected a range of services including an East Coast Leeds to King's Cross train with 130 passengers on board that became trapped without power at Huntingdon station. Several other East Coast services were stranded either side of the damaged area as all four lines were stopped to rail traffic. East Coast focused on resolving these trapped services and assisting those passengers arriving at Kings Cross from the delayed Leeds service with their onward journeys. Some northbound passengers stranded in Bedfordshire were provided with a bus replacement service; however this bus was then involved in an unrelated minor traffic accident.

The last East Coast King's Cross to Leeds train (23:30hrs) could not run due to lack of staff with the necessary knowledge of the rail route. This train was eventually cancelled at 01:30hrs when there was no alternative transport or accommodation available. This resulted in approximately 250 passengers being stranded at King's Cross station overnight, housed on an East Coast train. These passengers were finally provided with a northbound service at 07:00hrs the next day.

The ORR, Department for Transport and Passenger Focus all became involved in scrutinising the incident and treatment of passengers. East Coast's review of the incident focused on lessons learnt. It also offered redress to affected passengers for the problems they endured during the disruption, including letters to each passenger apologising and compensation for those involved in the bus accident. The ORR also investigated the root causes of the incident.

This incident highlighted:

> The importance of TOCs implementing local recovery plans and station incident plans with Network Rail effectively.

> The need for better contingency planning for customers in the event of the last train being cancelled.

> Better information to passengers during and after the incident, including information on their rights to compensation, alternative transport or accommodation under the national rail conditions of carriage.

This incident emphasises that the industry needs to work together with a clear and dedicated focus on the passengers' experience during serious disruption.

## Themes and issues

### At the station

4.61 In general, the quality of information to plan journeys and physical environment of stations has improved. Two issues are suggested by the evidence. First, perceptions of staff helpfulness are poor compared to the positive experiences of people when directly asking for help or advice. Second, disabled passengers are on occasion not getting the information they need to understand which stations are accessible.

### Purchasing tickets on the day of travel

- 4.62 The way that people buy tickets is changing. There are differences in the habits of older people when buying tickets compared to younger people, and between people working full time and those working part time or not at all.
- 4.63 Passengers buying tickets on the day are more likely to be older, not working or working part time and more reliant on the ticket office as their main sales channel. Younger people are more likely to use ticket machines. People who are not in regular work are: i) not able to take advantage of season tickets (where the fare is discounted); and ii) more likely to buy tickets on the day of travel.
- 4.64 There is emerging evidence of greater innovation across the rail industry in the types of tickets offered and the ways that people can buy tickets. The government recently announced plans to develop smart ticketing. In the meantime, some train operators have adopted some forms of electronic tickets (e-tickets), see Box 4.2.
- 4.65 In general, the *process* of buying tickets works reasonably well. However, information for passengers about ticket restrictions varies widely within and between sales channels, with a significant minority not being informed of ticket restrictions at all. There remains a degree of confusion amongst passengers, which reinforces the perception that getting a good price is down to luck rather than judgement. People do not always have a good reference price to compare tickets or judge value, for example because they do not travel regularly on a specific journey.

## On the train

- 4.66 Punctuality of trains overall has improved. But, there is a risk that improvements in performance is faltering, threatening the trend of increasing punctuality.
- 4.67 The experience on the train is improving. Passengers are more satisfied with the information supplied to them on the train. Satisfaction with the quality and comfort of the journey has improved. For disabled passengers the experience of receiving assistance on the day varies widely, suggesting inconsistency in how assistance is delivered between train operators or on different occasions.

## Managing delays and disruption

- 4.68 The overall incident of delays has generally been falling but the time to recover from a delay is going up. In the past, the passengers' experience of delays has been poor, with incomplete or inconsistent information provided during a delay and too little attention paid to the needs of passengers. We cannot yet be confident that this situation has changed sufficiently. Satisfaction with how well delays are managed remains low (at 38 per cent). Our recent findings indicate that passengers on trains do not always receive information about delays. In some cases, the information supplied does not appear to be helpful to passengers to manage the disruption or complete their journey. Specific episodes of disruption have left passengers stranded, without provision of accommodation (as required under the National Rail Conditions of Carriage), see Box 4.5.

## Actions

- 4.69 There are a number of initiatives being pursued that address the themes and issues identified in this chapter. The policy measures discussed in chapter 3 (see paragraph 3.46 above) are relevant to the experience of people during their journey, including:
- (a) making information about train performance more widely available and easy to use;
  - (b) enabling third parties to develop train information apps;
  - (c) steps by the rail industry, and recent announcements by DfT, to tackle complexity of tickets and awareness of ticket terms and restrictions; and
  - (d) the development of ORR's approach to monitoring and approval of DPPPs
- 4.70 Over the longer term, a trial of season tickets more suitable to people that work part time should offer greater flexibility, but this is linked closely to the development of smart tickets.<sup>38</sup>

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<sup>38</sup>*Rail Fares and Ticketing: Next Steps*, October 2013, DfT.

## Train performance

4.71 Since 2012, rail performance has deteriorated with a real danger that reliability and punctuality targets will be missed across all sectors. This has led to enforcement action (see Box 2.2) and will be closely monitored into 2014.

## Station improvement

4.72 The two investment programmes, National Stations Improvement Programme and Access For All has so far delivered improvements at over 400 stations across the network in the last five years.

4.73 The National Stations Improvement Programme (NSIP) has been using £179m of government funding to deliver station improvements during control period 4 (2009-2014). The programme aimed to target at least 150 medium sized stations across England and Wales. NSIP relies on local cross-industry groups (known as Local Delivery Groups) to develop the programme of works and, where possible, to attract additional third-party funding. As at December 2013 NSIP had funded 223 schemes, benefitting 387 stations. The programme includes extending station canopies, better signage, installing help points and customer information screens. It can also be used to improve waiting shelters, retail facilities and toilets. Further information about the works and the stations that have benefited from NSIP-funded improvements is available from Network Rail.<sup>39</sup>

4.74 The Access for All programme is a £370m scheme to deliver an accessible, step free route at 148 key stations across England, Wales and Scotland. Rail passengers are now able to use the new lifts, ramps, raised 'easier access humps' on platforms and accessible toilets. The Local Delivery Groups, which provide cross industry liaison for NSIP, also nominate stations for Access for All works. A list of stations in the programme can be found on the Network Rail website.<sup>40</sup> Those delivered so far include Blackburn, Clapham Junction, Long Eaton, Marple, Pitsea and Staines.

4.75 As we enter the next 5 year control period (2014-2019) funding has again provided money for the Access for All and for the Station Improvement Funds to ensure stations continue to be improved for the benefit of passengers. The Scottish Government has also targeted funds at station improvement, with a £30 million fund established as part of its high-level output specification.

4.76 In addition, the industry has developed information to help people plan routes around stations and access. The Association of Train Operating Companies (ATOC) have produced a map of the mainland National Rail network that provides at-a-glance information about the accessibility of many stations. The map uses symbols to indicate if each station has step-free access to all platforms from the station entrance,

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<sup>39</sup> <http://www.networkrail.co.uk/nsip/>

<sup>40</sup> <http://www.networkrail.co.uk/improvements/access-for-all/>

or limited access. Stations Made Easy provides floor plans of stations, with photos, to help people plan a route around a station.

### **Passenger information during disruption**

- 4.77 In March 2012 we introduced new rules, through train operators' and Network Rail's licences, that require the industry to keep passengers well informed during major disruption.
- 4.78 We introduced these rules following evidence from Passenger Focus and others that rail passengers too often suffered inaccurate, contradictory or missing information during major disruption. We were also concerned that the rail industry was not addressing these problems quickly enough.
- 4.79 Each train operator must follow a code of practice to ensure passengers get the information they need as early as possible. We wanted to ensure that clear accountability was in place when services are disrupted and that the industry would co-operate to supply information to passengers. In December 2012 we published an initial review of progress.<sup>41</sup> We found train operators are taking their licence conditions seriously. They have brought in new technology, such as systems feeding more accurate information on platform screens, and are changing operational culture by making passenger information part of the competency assessment of frontline staff. We've also seen the owning groups of TOCs ensuring good practice is shared across franchises.
- 4.80 We continue to monitor the performance of the rail industry to make sure information to passengers is provided promptly and accurately.

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<sup>41</sup> *Passenger Information*, December 2012, ORR (<http://www.rail-reg.gov.uk/upload/pdf/Passenger-information.pdf>).

## 5. After the journey

### Summary

- The number of complaints to train operators has been falling steadily (by nearly 60% since 2003-04). This may suggest that train operators are dealing with passengers more effectively, avoiding complaints. If passengers are dissatisfied, then train operators must follow their established complaint handling procedures to ensure an effective response to passengers' concerns.
- Where passengers are subject to a delay, very few people are claiming the compensation to which they are entitled. Just over 1 in 10 people eligible for compensation due to a delay actually make a claim. Overall, passengers are not well informed about their rights to compensation with two-fifths of people stating they know nothing at all about their compensation rights.
- Train operators have developed a number of approaches to help raise awareness and access to compensation. This includes a toolkit developed by ATOC to help train operators ensure passengers understand their rights and can exercise them. ATOC will be reviewing the effectiveness of these measures in the summer of 2014.

### Structure of this chapter

5.1 This chapter is structured as follows:

- (a) focus of this chapter, describes the stages of the passenger transaction considered in this chapter;
- (b) why this is important, which describes why this stage is important to passengers and a successful railway;
- (c) redress when things go wrong, presents data on complaints and research on passenger compensation claims for delays;
- (d) themes and issues, outlines the key points from the evidence presented; and
- (e) actions by industry or ORR that address any issues identified.

### Focus of this chapter

5.2 This chapter focuses on the more formal ways in which passengers engage with or contact their train operator, including:

- (a) recognising good service or performance;
- (b) registering a complaint or grievance; and
- (c) making a claim for compensation.

## Why this is important

- 5.3 Effective complaint handling and redress is essential to ensure trust and confidence in a train operator and the wider industry it represents. For railways, all train operators are required through a licence condition to put in place and comply with a 'complaints handling procedure' (see Box 5.1). In addition, train operators are obliged to offer compensation for delays under the Conditions of Carriage or Delay Repay (see Box 5.2).
- 5.4 Resolving issues or concerns effectively is best practice for successful businesses. It is also an essential feature of an effective market. Passengers must have confidence that the service offered by their train operator will be delivered. Failing this, where their contract with the train operator is not met, passengers must be satisfied that their concerns will be resolved, recognising any loss of money, time or inconvenience.

## The principles important to a good experience

- 5.5 A number of standards have been established for good quality complaint handling across other services.<sup>42</sup> These focus on measures to ensure that:
- (a) the process to register a complaint is accessible to everyone;
  - (b) complaints are acknowledged and dealt with fairly in a reasonable timescale; and
  - (c) information on the complaint procedure, and who to turn to if unsatisfied with how the complaint was handled, is clear to passengers.
- 5.6 The core principles relevant to complaint handling and redress are:
- (a) access – the information of how to contact a train operator or make a complaint is brought to peoples' attention and made available through a range of methods;
  - (b) quality – complaint handling procedures are clear and easy to understand, and complaints are treated objectively and consistently; and
  - (c) empowerment – the process enables genuine concerns or issues, from any type of passenger, to be raised and resolved within a reasonable timescale.

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<sup>42</sup> For example, the Parliamentary and Health Service Ombudsman (<http://www.ombudsman.org.uk/improving-public-service/ombudsmansprinciples/principles-of-good-complaint-handling-full>) and Ofcom (<http://consumers.ofcom.org.uk/2009/12/improving-consumer-complaints-handling-processes/>) have established principles of good complaint handling.

### **Box 5.1 – Complaint handling**

Each train operator must put in place procedures for how it will handle complaints from passengers. Until recently these procedures were subject to approval by the Secretary of State for Transport. Since October 2013, the ORR has been responsible for the review and approval of the procedures.

The procedures outline key information for customers, including:

- > Contact details and hours of opening for customer service contact centres
- > How a complaint can be made, including in person to station or rail staff, through pre-printed comment forms, by writing or telephone
- > The service standards for responding to or escalating a complaint
- > Details for Passenger Focus and London TravelWatch if the customer is not satisfied with how the complaint has been resolved

Train operators review their complaints handling procedures annually, in consultation with Passenger Focus and London TravelWatch.

## **Redress when things go wrong**

5.7 The rail industry has an established scheme for compensating passengers affected by delays, a less generous system under the National Rail Conditions of Carriage or the Delay Repay scheme (see Box 5.2). This section is organised as follows:

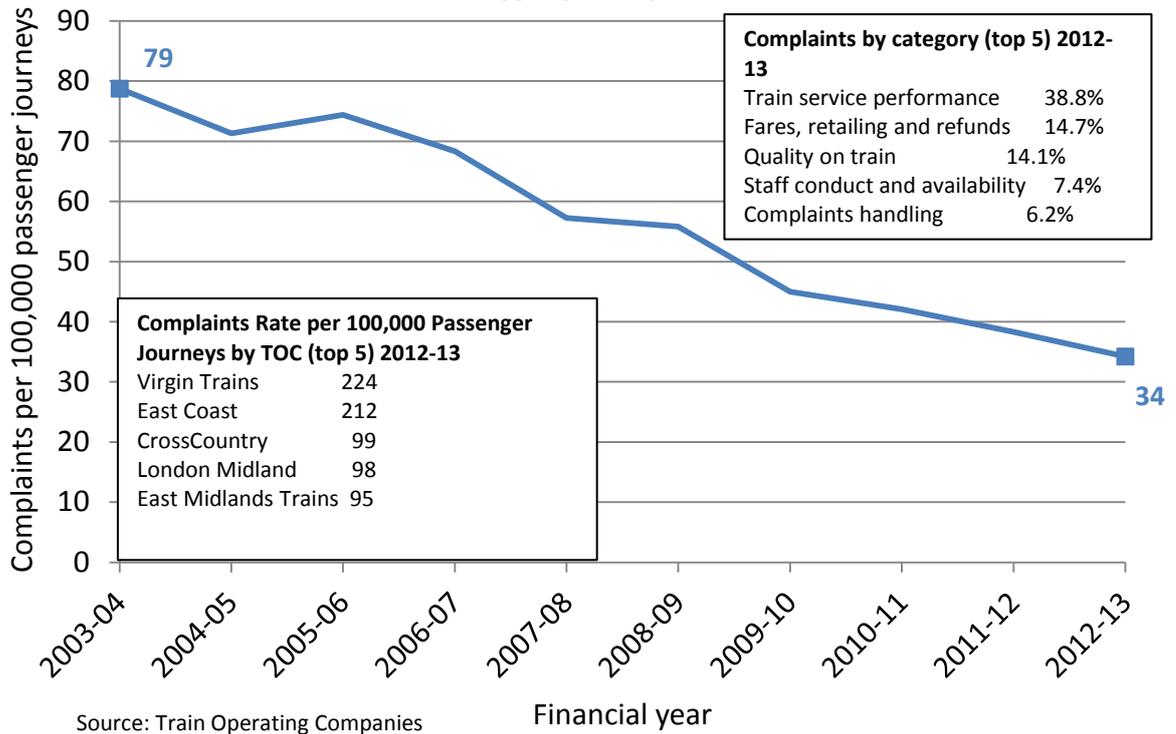
- (a) previous research – summarises data on complaints made to train operators based on industry data collected by ORR and previous published research into passengers' awareness and experience of claiming compensation; and
- (b) National Rail Passenger Survey – presents information on the proportion of passengers claiming compensation and satisfaction with the process.

### **Previous research**

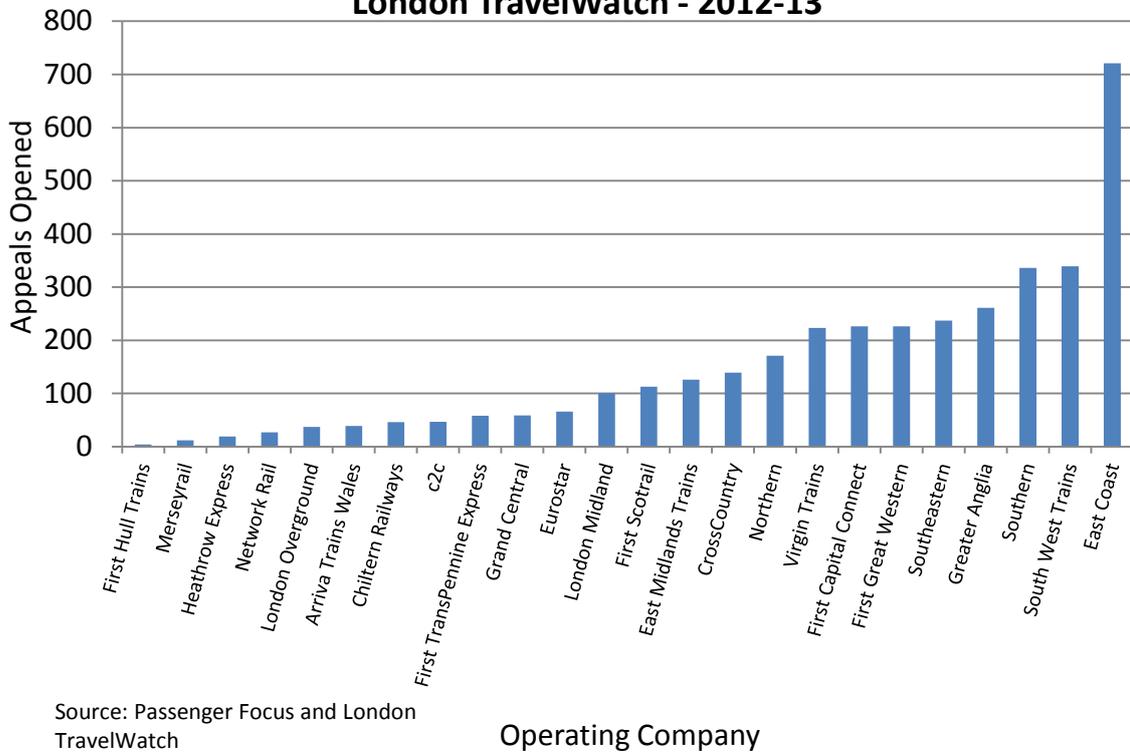
#### **Complaints**

5.8 The ORR collects data on complaints made to TOCs and the appeals raised with Passenger Focus and London TravelWatch. This shows a steady decline in the number of complaints, with long distance operators receiving the most complaints in 2012-13. The main issue complained about is train performance (i.e. punctuality). In 2012-13, East Coast was the train operator with the greatest number of complaints appealed to Passenger Focus or London TravelWatch. An appeal can be made where a passenger is dissatisfied with how their complaint was handled (see Box 5.3).

### Complaints Rate per 100,000 Passenger Journeys - 2003-04 to 2012-13



### Number of complaint appeals opened by Passenger Focus or London TravelWatch - 2012-13



## Compensation

- 5.9 Both ORR and Passenger Focus conducted research independently into the experience of passengers claiming compensation for delays:<sup>43</sup>
- (a) ORR's research was undertaken in early 2013 using online survey, focus groups and face to face interviews to understand awareness of compensation and refunds, how people learned that compensation was available and the likelihood of claiming;
  - (b) Passenger Focus undertook research in March 2013, using an online survey of people who had experienced a delay of 30 minutes or more in the last six months, focusing on passengers' awareness and experience of compensation and attitudes towards the current compensation arrangements.<sup>44</sup>
- 5.10 We present key findings, drawing on both pieces of research, below.

### ***Awareness and information about compensation***

- 5.11 Overall, 71 per cent of passengers consider that compensation is important but only 18 per cent felt they knew what compensation they may be entitled to if their train was delayed. Further, the same proportion (18%) agreed that information about compensation was always or usually made available by TOCs, and this was lower still (at 6%) for those without internet access. The youngest age group (16-24 year olds) were the most likely of all the age groups to say they knew a 'great deal' or 'fair amount' (31%) about their rights to compensation for a delay, with those aged 65+ the least likely to know a great deal or fair amount (11%).

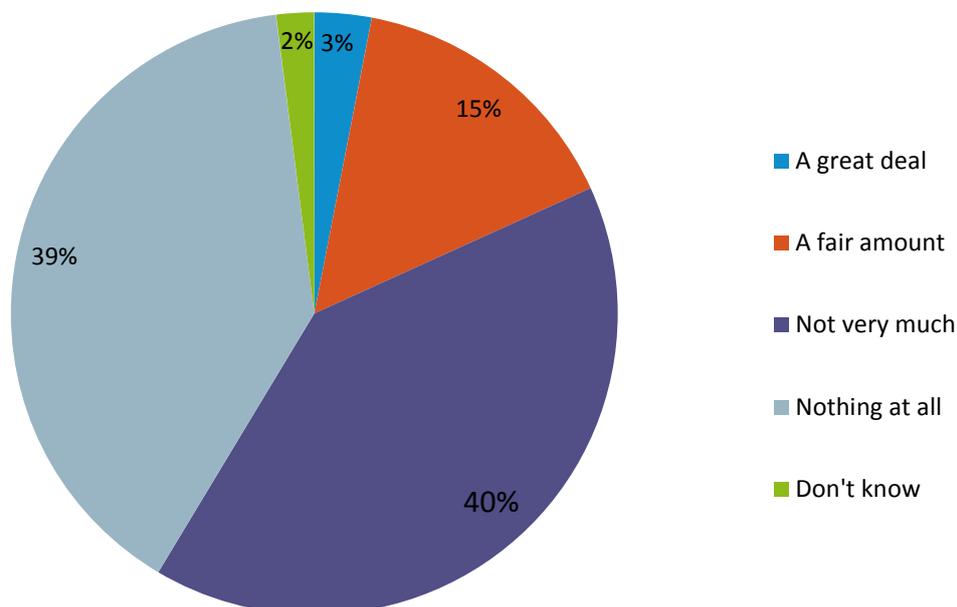
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<sup>43</sup> ORR's research asked about compensation for delays and refunds on tickets not used or in the case of cancellations to specific services.

<sup>44</sup> *Understanding rail passengers – delays and compensation*, July 2013, Passenger Focus.

### How much, if anything, do you know about compensation arrangements?

(source: ORR)



Question: With specific regard to rail journeys, how much, if anything, do you know about the compensation arrangements that might apply if you are delayed reaching your destination? (Base = all)

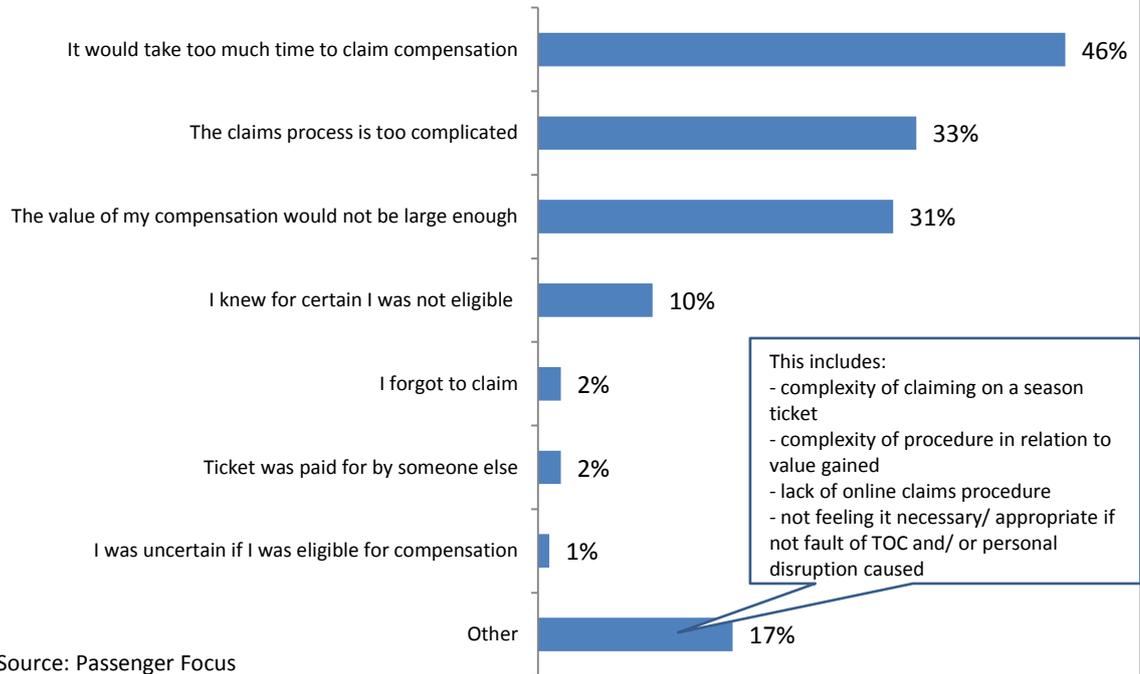
5.12 For ticket refunds, there was very low understanding of the circumstances in which rail passengers could receive a refund, with 19 per cent knowing 'a great deal' or 'a fair amount'.

5.13 Passenger Focus looked into how people become aware of their entitlement to compensation for a delay. The most common way was through direct research by passengers (mainly online) or word of mouth (hearing from family/friends or from other passengers), accounting for 31 per cent of respondents. About 15 per cent of respondents had learnt of their entitlement to compensation through announcements or other actions by train operators to draw passenger attention to compensation.

#### **Claiming compensation**

5.14 The research by Passenger Focus targeted those that had been delayed by 30 minutes or more, that is those eligible for compensation under the Delay Repay scheme. This found that nearly 9 in 10 (88%) of eligible passengers did not claim compensation for a delay. This is consistent with findings from the NRPS (see paragraph 5.15 below). Amongst passengers who are aware of compensation but choose not to claim, perceptions about the claims process are the biggest barrier. Almost half believe that it would take too long to make a claim, whilst a third feel that the claims process is too complicated or that the value of compensation would not be large enough.

## Reasons for not claiming compensation



### **Box 5.2 Compensation for delays or cancellations**

Each train operator will explain in its Passenger Charter the compensation entitlement available to passengers suffering a delay or cancelled service. At a minimum, this compensation must meet the terms in the National Rail Conditions of Carriage, which allows compensation if delayed for one hour or more but only if the train operator was responsible for the delay. The Delay Repay scheme offers more generous compensation with passengers entitled if their train is delayed by 30 minutes or more regardless of the cause of the delay. The amounts payable are:

> For 30-59 minutes delay, you are entitled to compensation of 50% of the cost of a Single ticket or 50% of the cost of either the outward or return portion of a Return ticket as appropriate; for season tickets and weekly tickets, compensation will be calculated as a proportion of the daily cost of the price of the ticket.

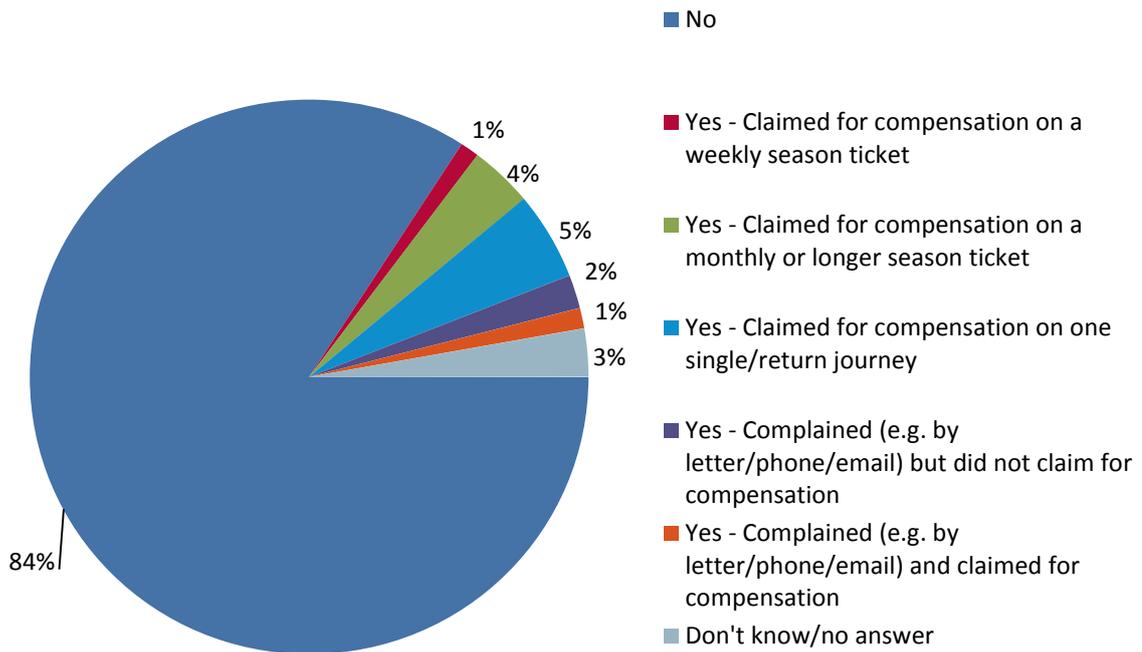
> For delays of over 60 minutes the amount of compensation is doubled to 100% of the cost of the Single ticket or either portion of the Return ticket.

The compensation itself is usually paid in 'rail vouchers' valid for 12 months. The compensation can be redeemed as a discount off the purchase price of the passenger's next ticket, if purchased from a ticket office or appointed travel agent.

## **National Rail Passenger Survey**

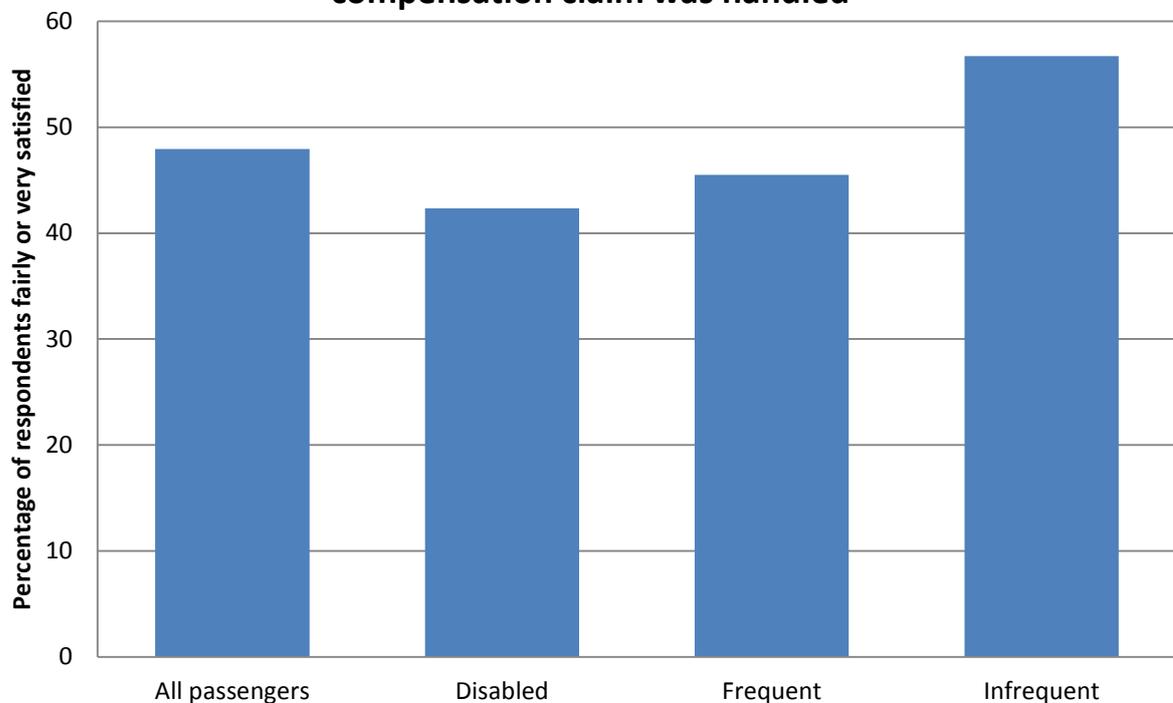
- 5.15 The National Rail Passenger Survey asks about the experience of those that have complained to their train operator and / or claimed compensation for a delay to their journey. Overall, 11 per cent of people responding to the NRPS have claimed compensation with 3 per cent raising a different complaint. Less than 50 per cent of these people were satisfied with how their claim was handled. The most common causes of dissatisfaction were the quality of explanation in response to a complaint or the amount of compensation offered.

### Have you claimed compensation (all passengers)?



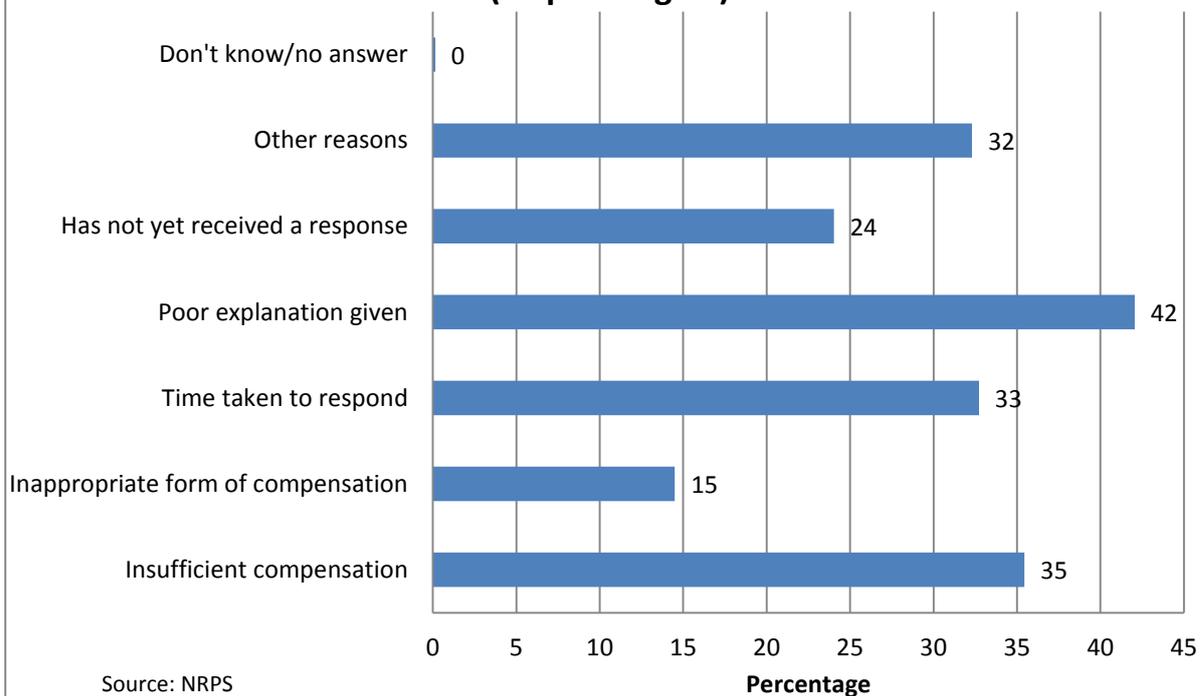
Source: NRPS

### Percentage of passengers satisfied with how their compensation claim was handled



Source: NRPS

### Reasons for dissatisfaction with complaint handling or compensation for delays (all passengers)



### **Box 5.3 – How complaints are escalated to Passenger Focus or London TravelWatch**

If a passenger has a concern or problem with the service they received using national rail (including London Overground services), they should raise this with the train operator. Each operator must have an approved complaints procedure (see Box 5.1).

On occasion, passengers may be unhappy with how their complaint was handled or its outcome. In these cases Passenger Focus or London TravelWatch may be able to review the complaint, how it was handled and the response provided by the operator. The operator may be asked to review its decision, with the issue raised with senior management if necessary.

The information received from passengers when handling complaints helps identify trends or persistent issues that need a wider resolution. This enables Passenger Focus and London TravelWatch to lobby more effectively for change.

## **Themes and issues**

### **Redress when things go wrong**

- 5.16 The overall number of complaints to train operators has been falling steadily (by nearly 60% since 2003-04). This suggests that train operators are dealing with passengers more effectively, avoiding complaints. If passengers are dissatisfied, then train operators must follow their established complaint handling procedures that help to ensure an effective response to passengers' concerns.
- 5.17 Of greater concern is that, where passengers are subject to a delay, very few people are claiming the compensation to which they are entitled. Just over 1 in 10 people eligible for compensation due to a delay actually make a claim. Overall, passengers are not well informed about their rights to compensation; two-fifths of people state they know nothing at all about their compensation rights.

## **Actions**

- 5.18 A number of actions are in place or planned to address the issues in this chapter, these are briefly considered below.
- 5.19 In October 2013, ORR took responsibility for approval of train operators' complaint handling procedures. We will be publishing a statement on our approach to this in April 2014, followed by a review of the current guidance for train operators on how to prepare a suitable procedure in consultation with stakeholders.
- 5.20 Train operators have developed a number of approaches to help raise awareness and access to compensation. This includes a toolkit developed by ATOC to help train

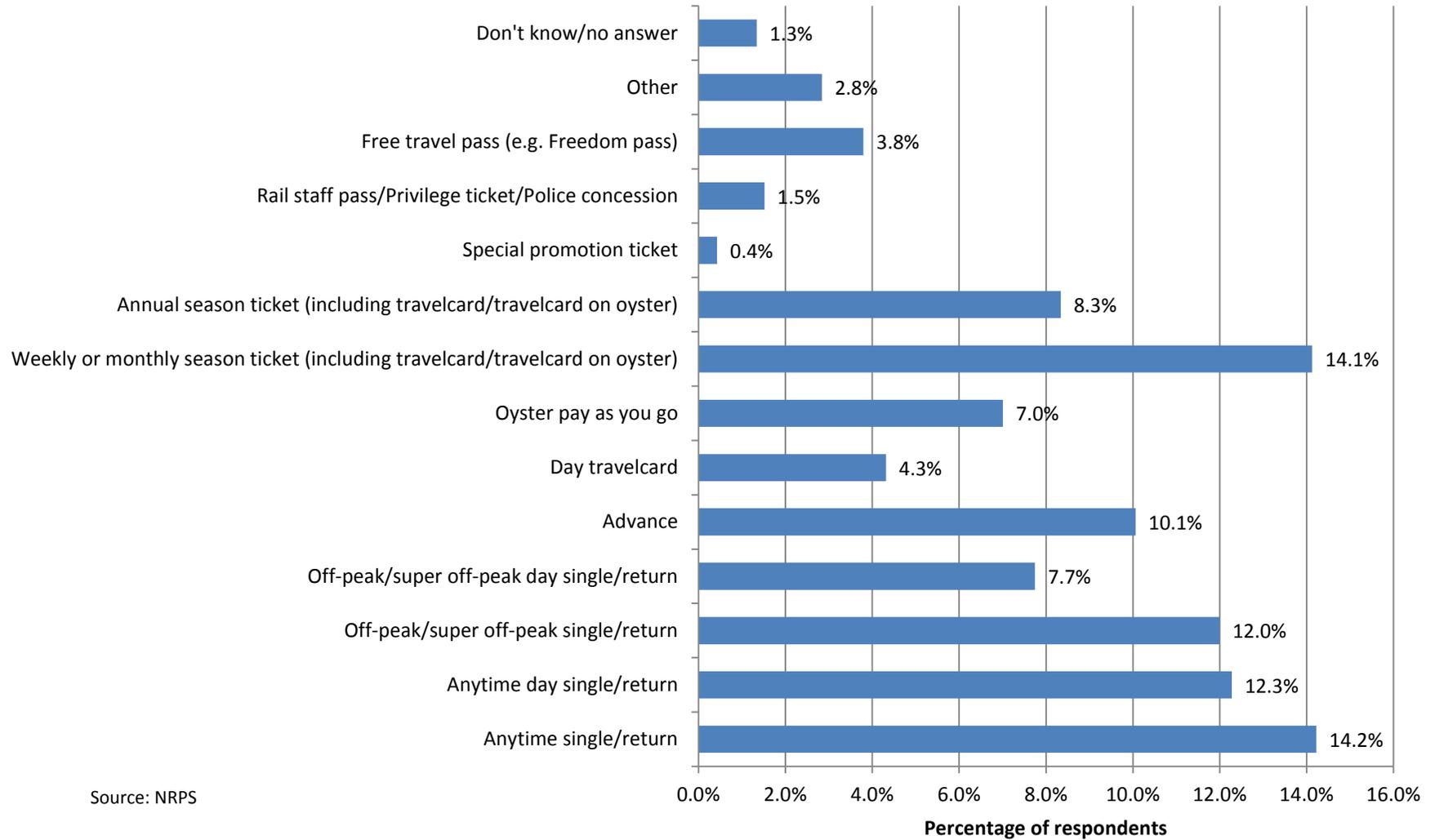
operators ensure passengers understand their rights and can exercise them. ATOC will be reviewing the effectiveness of these measures in the summer of 2014. It will be important to see a demonstrable improvement in consumer awareness and take up of their compensation and refund rights. We will engage with ATOC during its review and decide on the next steps after it is complete.

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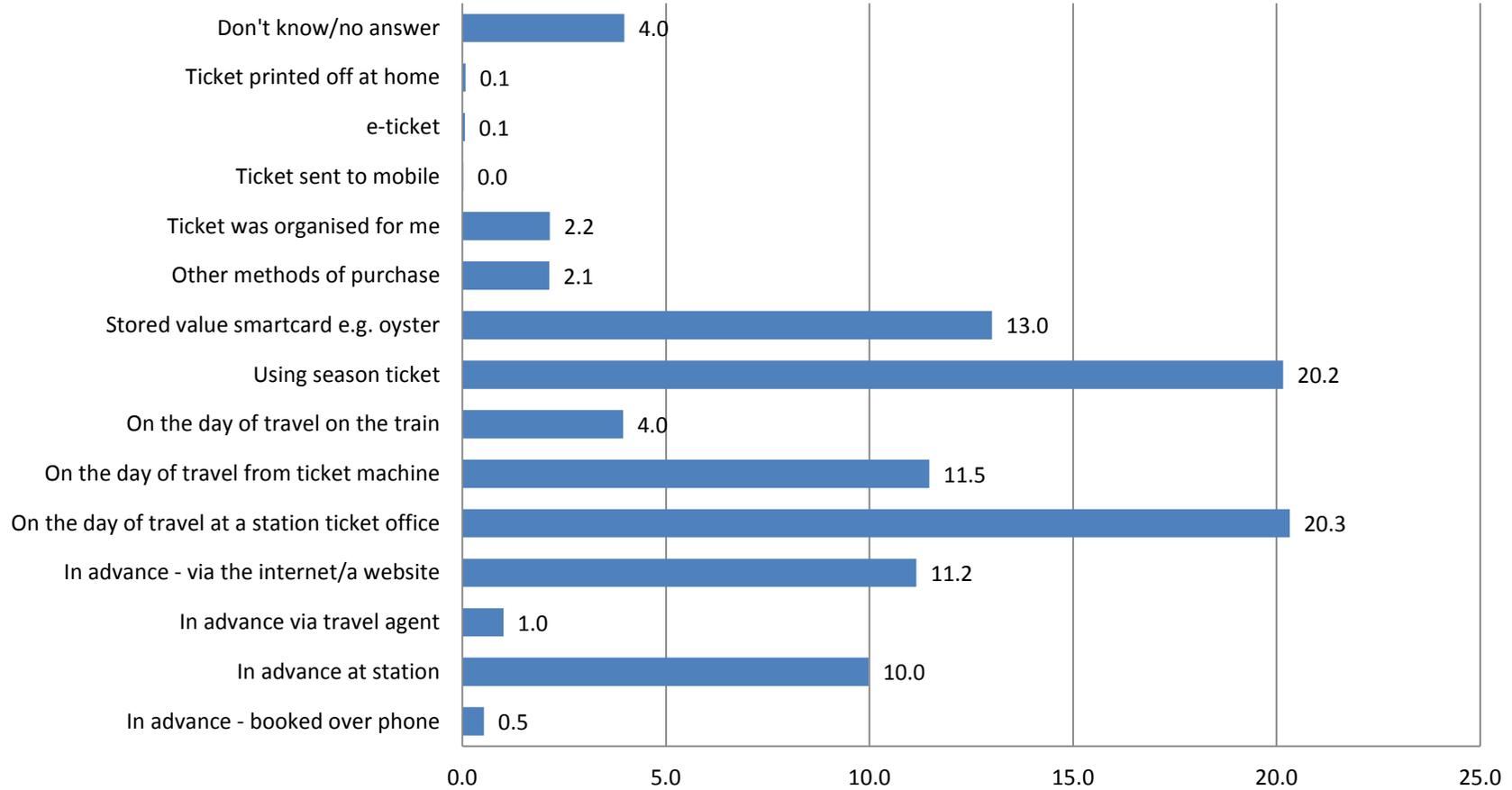
# Annex A: National Rail Passenger Survey – additional data

- A.1. The National Rail Passenger Survey is undertaken twice a year by Passenger Focus, in the spring and autumn, starting in 1999. It collects views from passengers on the specific journey they are taking, with the survey handed out to passengers as they board a train service. Headline results on satisfaction are published shortly after each survey. The survey itself contains a wide range of questions to understand passengers' travel habits and views. A detailed technical report on the survey design is available from Passenger Focus.
- A.2. The following graphs are based on both the combined autumn 2012 / spring 2013 survey into a single set of satisfaction scores and for each survey results in the spring and autumn over time (therefore providing a time series).

### Ticket types purchased, all passengers 2012/13

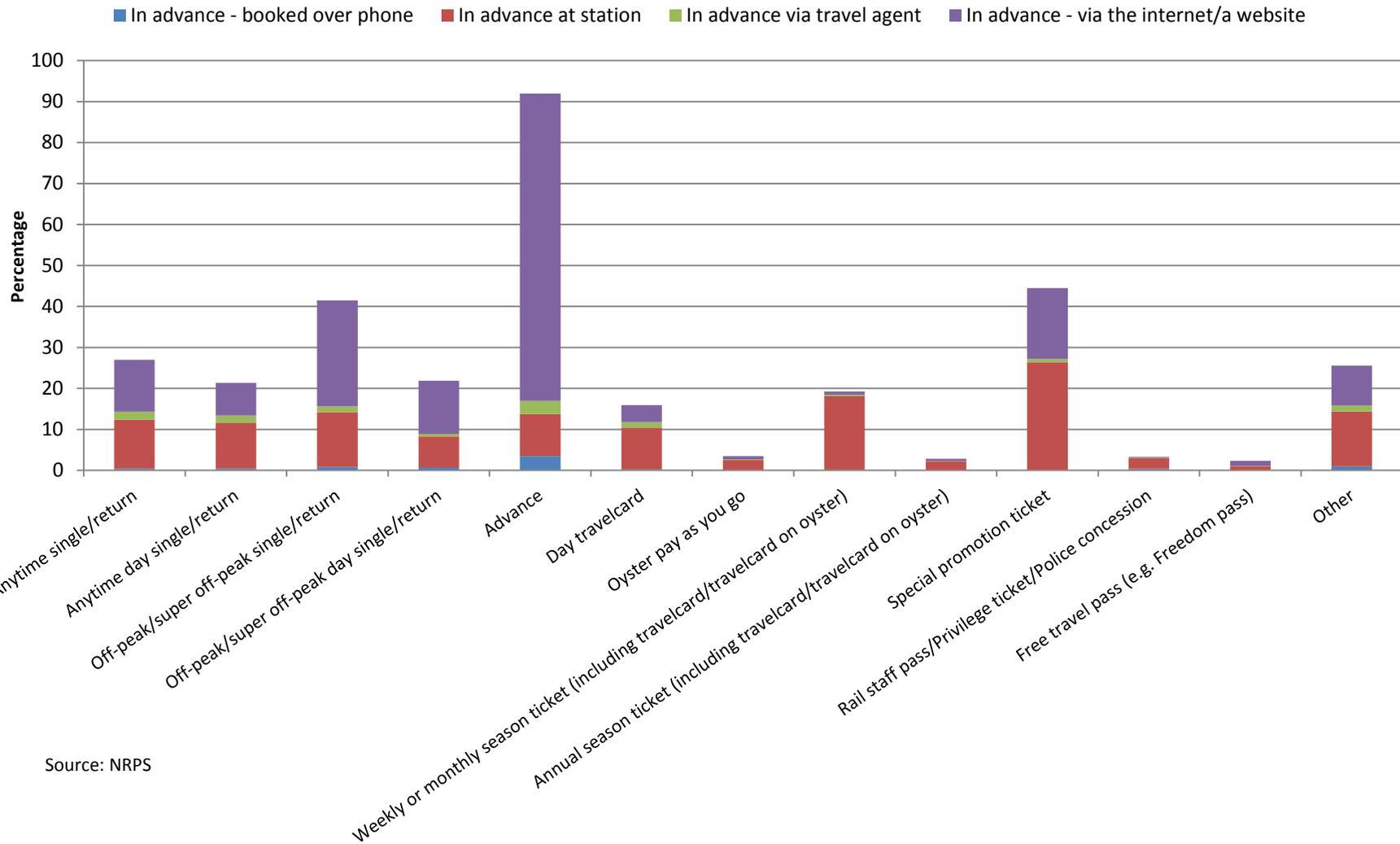


### Sales channels for ticket purchases, all passengers 2012/13

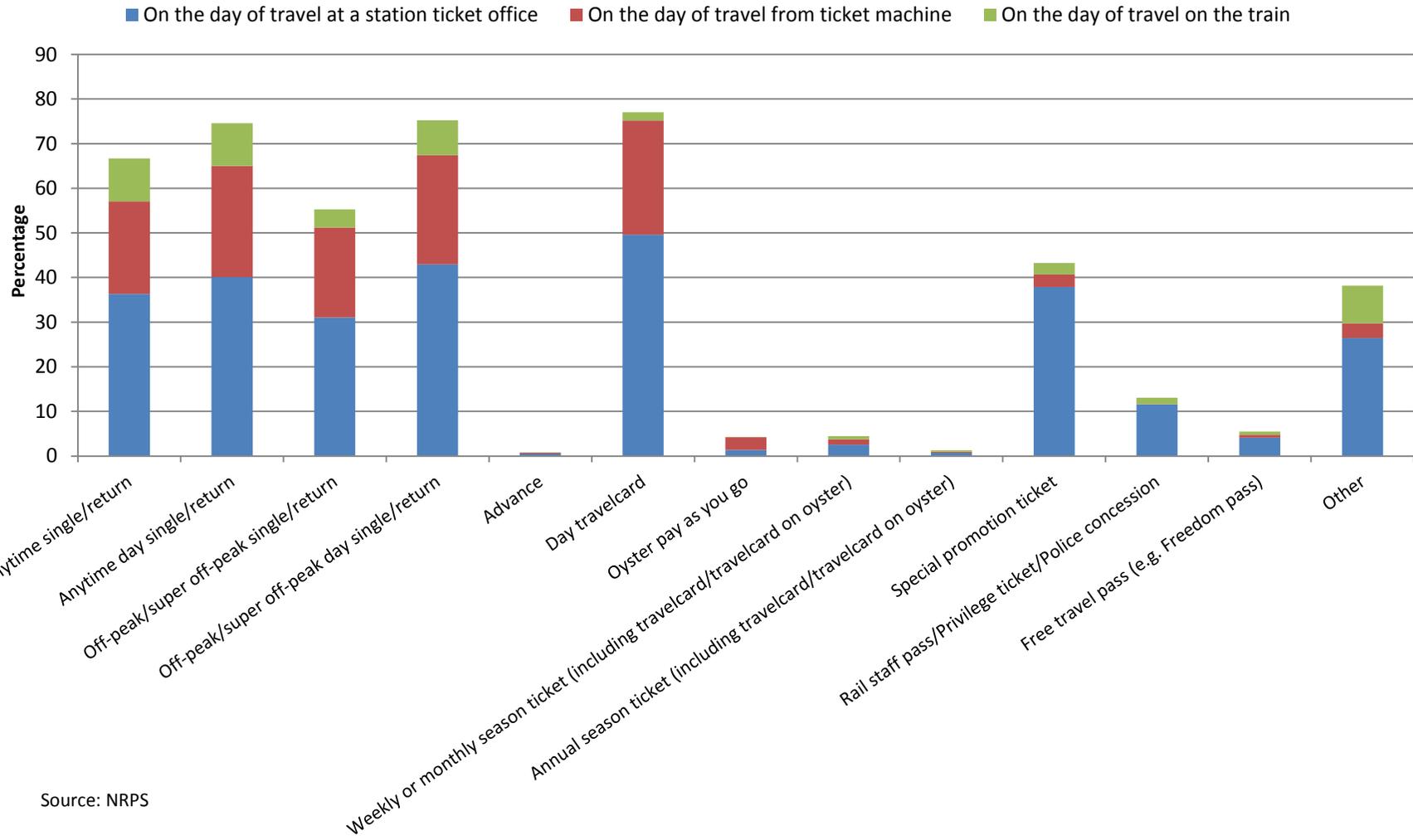


Source: NRPS

### Percentage of different ticket types purchased before the day of travel, 2012/13

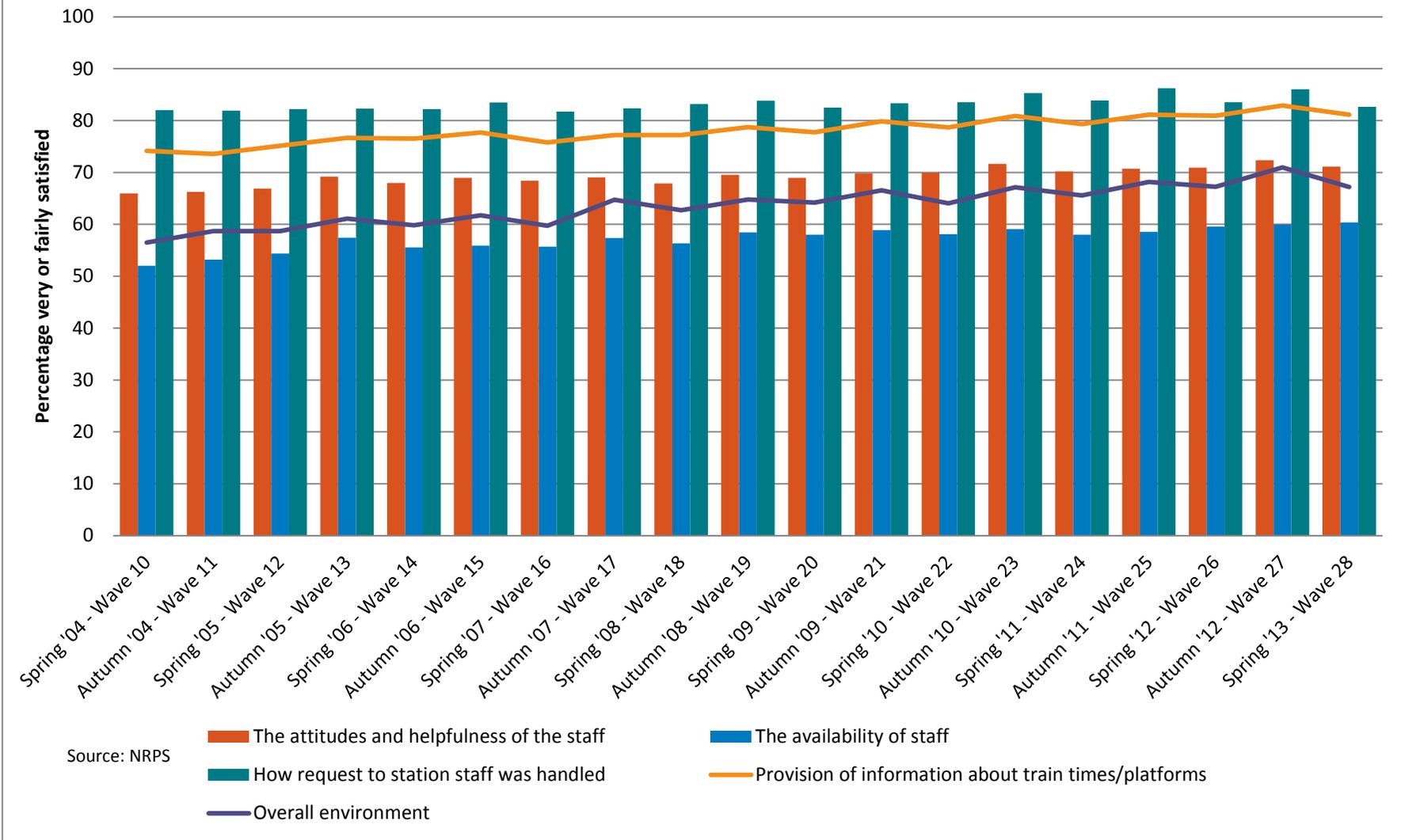


### Percentage of different ticket types purchased on the day of travel, 2012/13

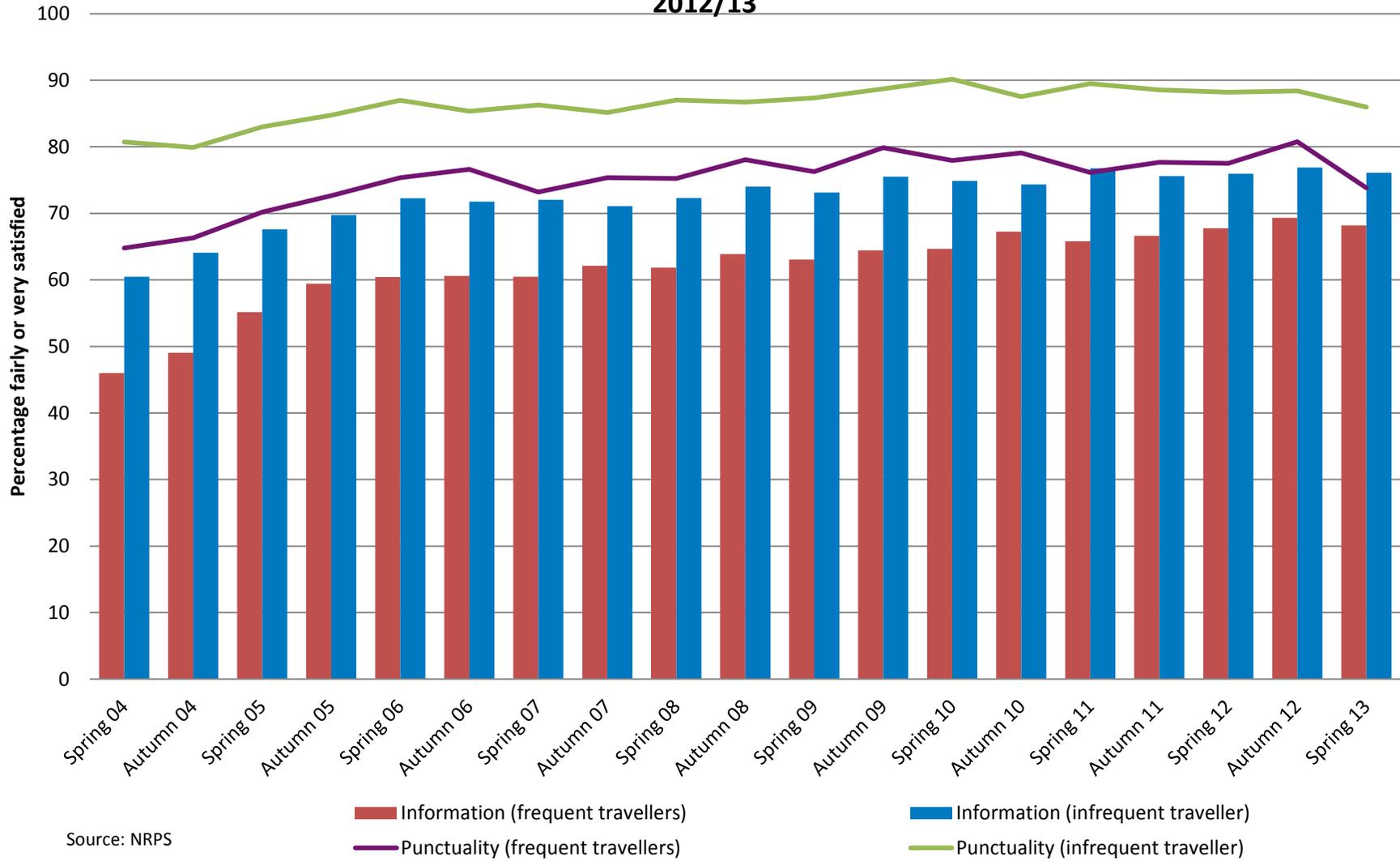


Source: NRPS

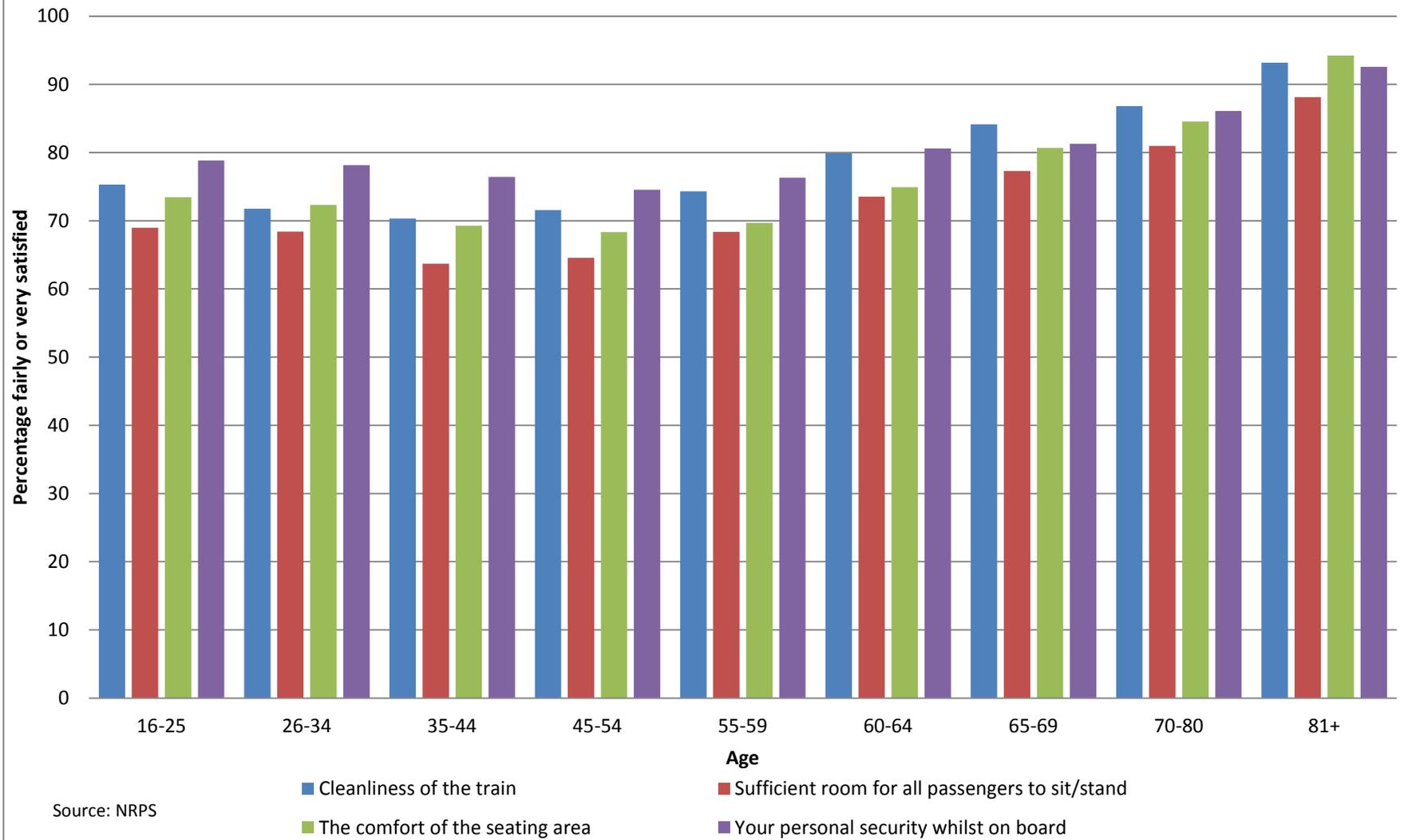
## Station - overall satisfaction, 2012/13



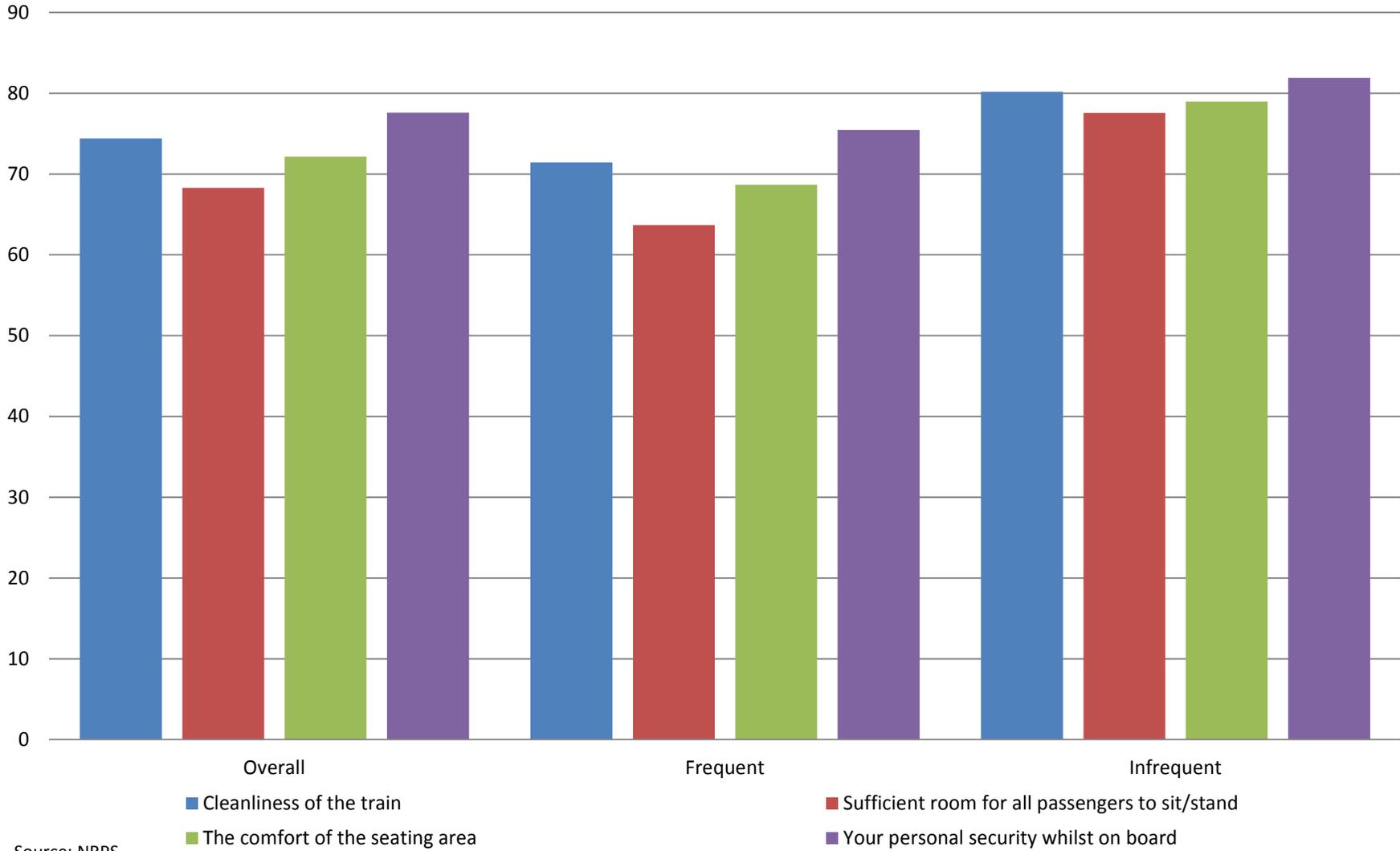
### On the train: Satisfaction with punctuality and information by frequency of traveller , 2012/13



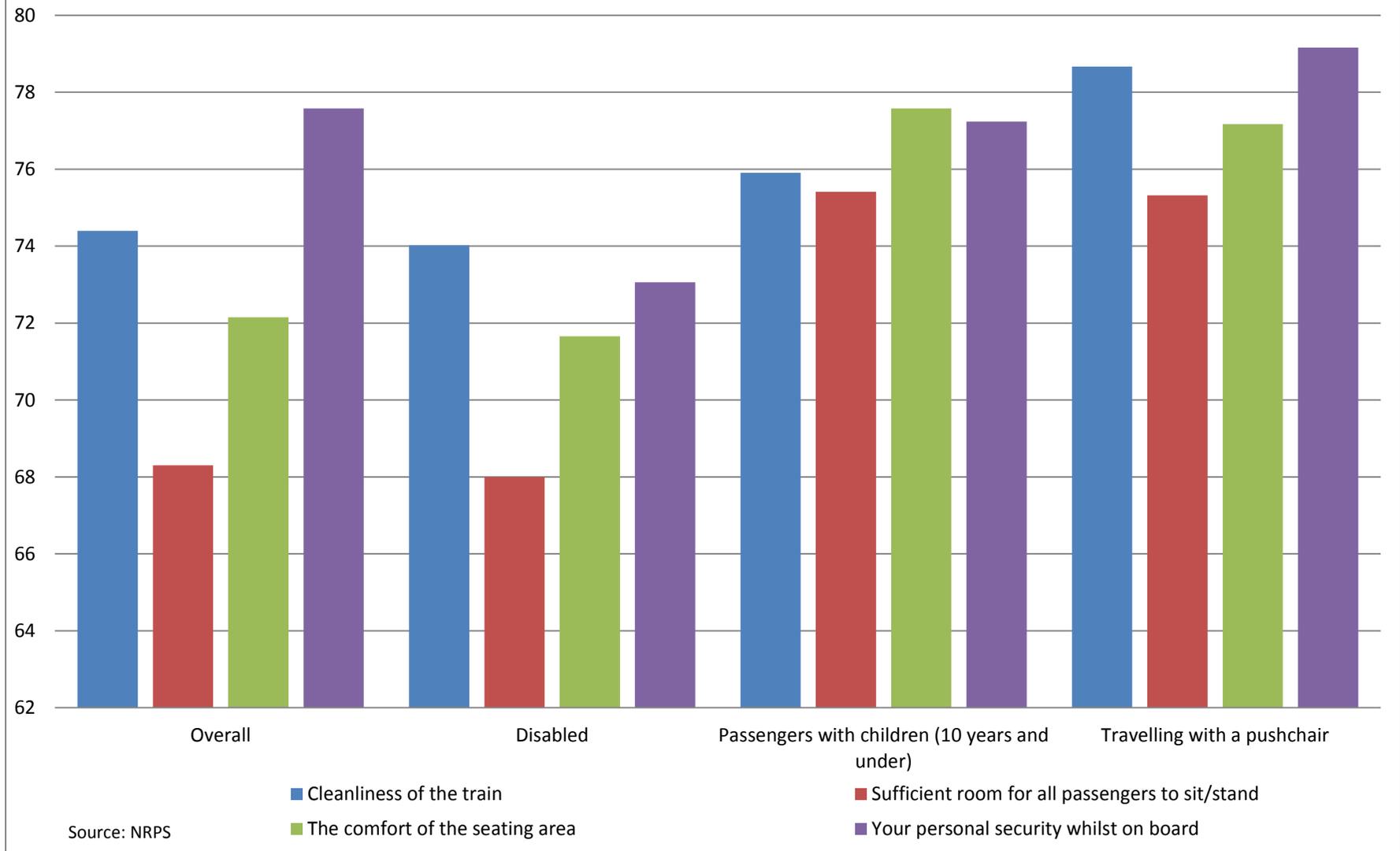
**On the train: comfort by age, 2012/13**



**On the train: Comfort by frequency of rail travel, 2012/13**



**On the train: Comfort, overall respondents and selected sub-groups, 2012/13**



# Annex B: The operation and regulation of passenger railways

## How passenger rail services work

B.1. The railways have been privately operated for 20 years. However, many services passengers receive remain subject to regulation. This section outlines some of the main features of Britain's railways that can affect passengers' experience of using trains. We briefly describe how passenger train operators are chosen to operate on specific routes under the franchising, concession and open access approaches. We outline the regulation of passenger service standards, the rules on ticketing and the special provisions to protect passengers, covering complaint handling and meeting disabled passengers' needs.

### Passenger train operators and routes

B.2. Train operators run timetabled services along specific routes. There are three approaches to deciding who should run passenger rail services along specific routes: franchising, concessions and open access. Franchised and concession train operators run over 99 per cent of all passenger train services on Britain's railways.

### Franchising

B.3. A rail franchise is a contract between government or a public authority and a train company to run services within a specified geographic area or route for an agreed period of time. The franchise agreement sets out the service levels a train operator must deliver. Some franchises are tightly specified, detailing precise service levels or improvements, others offer the train operator greater scope to develop services as they see fit. Franchises will typically include terms covering frequency of trains, capacity and seat availability, and punctuality targets (to reduce delays and cancellations). Franchises may also require specific types of improvements or investments in station or train facilities. For example, the Greater Anglia franchise requires the franchisee to deliver cycle storage for up to 500 bicycles, and Greater Western must install 124 new ticket vending machines.

B.4. Franchises are awarded to businesses through a bidding process where the government specifies length of the franchise, service schedules and performance standards, investments in stations and rolling stock (i.e. trains) or other requirements. These requirements are set by government after consultation with devolved administrations, Passenger Focus and other relevant transport authorities. Bidders will need to balance the costs of running the franchise against the revenue (from fares, car parking and retailing) that they expect to make. This can either result in them proposing to pay money to the government to run the franchise (known as a

premium) or setting out how much money they will need from government (known as a subsidy) to meet the services government has specified in the franchise. The successful bidder will satisfy government that it can reliably meet the franchise terms at the best price (or least subsidy), with the franchise award also influenced by the strength of the bidder's relevant past performance, their commitments to improve train and crew reliability and their operational viability.

- B.5. The government has set out a detailed timetable for the renewal of franchises, which aims to stagger the award of new franchise contracts. In 2014 four existing franchises will come to an end (Northern, Greater Anglia, West Coast and South Eastern), which will either be extended or run by government (through Directly Operated Railways, which runs the East Coast Mainline). Two new franchises will be awarded, Essex Thameside and a new franchise combining Thameslink, Southern and Great Northern.

### **Box B.1 – Franchises and passenger experience**

The proposed new Thameslink, Southern and Great Northern (TSGN) rail franchise is planned to run for a seven-year period from September 2014. It will encompass the separate Thameslink/Great Northern franchise currently operated by First Capital Connect (FCC) and the South Central franchise currently operated by Southern and incorporating the Gatwick Express branded services. It will also fully incorporate some services that are currently run jointly by FCC and Southeastern.

The successful franchisee must monitor and publish how it is performing against a new Passenger Experience Metric each year. The Passenger Experience Metric combines the results of Passenger Focus' National Rail Passenger Survey of satisfaction, and an independently audited assessment of the standard of facilities and services provided by the operator. The set of indicators used to measure the quality of facilities and services onboard trains and at stations (called QuEST) has been drawn up with the help of Passenger Focus and is a modification of the tried-and-tested SQUIRE (Service Quality Incentive Regime) process used by Transport Scotland for the ScotRail franchise.

The Department has set a rising target for the Passenger Experience Metric, and the franchise agreement will include financial incentives to encourage the franchisee to meet or exceed these performance targets throughout the duration of the franchise.

## **Concession**

- B.6. A concession also involves an agreement between government or a local authority and a train operator to supply rail services. The main difference is that the operator is

paid a fee to run the service rather than relying on revenue from passengers or subsidy. Typically, revenue raised is passed back to the public body that appointed the concession. Concessions are usually very tightly specified, using incentive or penalty regimes (based on meeting certain targets) to encourage good performance. Examples of rail concessions are Merseyrail, which runs services for Merseytravel, the Passenger Transport Executive managing integrated transport in and around Liverpool and London Overground, appointed by Transport for London.

## Open access

B.7. Open access passenger train operators are those who operate services purely on a commercial basis rather than under a franchise or a concession agreement. These operators must meet the ORR safety and licensing requirements and must apply for the necessary track access rights and to Network Rail for train paths in the timetable. In effect, most Open Access operators offer services scheduled 'between' the existing timetabled services of the franchise operator. Open Access operators are still subject to industry regulations affecting fares and ticketing regulation. Examples of open access passenger operators are Hull Trains, operating direct services between Hull and London and Grand Central, operating services from West Yorkshire and York to London.

## Train operators

B.8. Annex C: lists the main passenger train operators, including their owner group and a brief description of the services they operate. The DfT has a programme of franchise renewals in place that will see changes to the services covered under existing franchises.

## Service standards for passenger rail services

B.9. Franchises and concessions usually impose a number of obligations on train operators that protect the quality of passenger services or limit changes to rail fares. In addition, all train operators must hold a licence from the ORR that includes some additional conditions to protect passengers' interests. As a result, train operators must follow rules that affect:

- (a) the timetabling of trains and frequency of certain services to ensure key services are supplied;
- (b) the performance standards that the operator must meet and (for franchises) specific improvements or investments to stations or facilities;
- (c) the types of tickets operators must offer, the conditions attached to them and the overall maximum level of the fares;
- (d) the arrangements for compensating passengers during delays; and
- (e) the provisions to help disabled passengers with their journeys.

B.10. The way this regulation works and how it affects passengers' experience of rail follows.

## Ticketing

B.11. A passenger must have a valid ticket for their journey. Tickets are valid on a specific route or journey and a specific date or period (for example weekly). Tickets can also include restrictions on when or how they may be used (example the time of travel or whether valid on a specific train). The level of fares for some tickets are capped or limited, restricting the amount that a passenger has to pay. Table B1 below outlines the main ticket types, most common restrictions and notes whether the level of fares are regulated.

**Table B1 – Types of tickets and restrictions**<sup>45</sup>

Ticket Type	Description	Restrictions
Anytime Single/ Return	Fully-flexible fares for long distance travel  <i>Fares: Usually unregulated</i>	Valid at any time Return: on or within 5 days of the date shown on the ticket (outward); within one calendar month of the date shown on the ticket (return).  Single: valid for 2 days from the date shown on the ticket
Off-Peak/ Super Off-Peak Single/ Return	Cheaper but less flexible fares for long distance travel  <i>Fares: Either the Off-Peak or Super Off-Peak is usually regulated</i>	Restricted to use on less busy services (varies by operator and route). The Single and the outward portion of a return ticket are valid only on the date shown on the ticket (until 04:29 the following morning); the return portion of a return ticket is valid for up to one month.
Anytime Day Single/ Return	Fully-flexible fares for short distance travel  <i>Fares: Usually regulated</i>	Valid at any time on the date shown on the ticket
Off Peak Day Single/ Return	Cheaper but less flexible fares for short distance travel  <i>Fares: Usually unregulated</i>	Valid on the day shown on the ticket but not usually valid before a specified time Monday-Friday mornings (varies by operator/route); restrictions on travel during the evening peak may also apply

<sup>45</sup> See Annex A, *Rail Fares and Ticketing Review: Initial consultation*, March 2012, DfT.

Advance	Book-ahead non-flexible fares for long-distance travel, sold in limited numbers  <i>Fares: Unregulated</i>	Valid only on the specific booked departure as per the reservation. If the booked departure is missed, a new ticket must be bought to travel on the next service. Advance tickets may be changed prior to departure subject to payment of any difference in fare and an administration fee, but no refunds are available if the ticket is not used.
Season	Available for any journey for which a regulated fare exists  <i>Fares: Usually regulated</i>	Unlimited travel for a period of 7 days or for any period between 1 month and 1 year

- B.12. A key restriction to tickets is the time of day that they are valid, often termed as ‘peak’ or ‘off-peak’. The actual peak times will vary between train operators and routes. In general, for long-distance journeys fares regulation sets a maximum window within which train operators may define the peak. Currently, this window is defined from the start of service in the morning to 10.30, applicable across the country. For long-distance journeys starting from stations in and close to London, there is also an afternoon/evening peak period from 15.00 to 19.00. Some operators currently use the full window and may even see their actual peak spread beyond this as well; others define their peak as starting later or finishing earlier.
- B.13. For short-distance travel, off-peak fares are not regulated. This allows train operators to apply any time restrictions they want (or none at all) although operators may often use similar time bands to the ones used for regulated fares.

## Fares regulation

- B.14. The term ‘fares regulation’ is normally used to describe the clauses in train operators’ franchise agreements that specify the range of fares operators must offer, the conditions attached to them and the maximum level of overall fares.
- B.15. The government has a number of statutory obligations and policy considerations underpinning fares regulation that must be balanced, including:
- (a) ensuring rail fares are reasonable, given the share of funding between passengers and tax payers, while aiming for rail travel to be affordable to a wide group of people;
  - (b) protecting passengers from possible market power;
  - (c) allowing scope for innovation in fares and ticketing; and
  - (d) ensuring passengers are treated fairly when they are buying tickets.
- B.16. The level of rail fares is a major concern for passengers. Each January rail fares change at a rate set by government, often increasing by more than average prices (as

measured by the 'retail price index'). The way that average fares are set and the scope for operators to 'flex' fares has been subject to criticism.

- B.17. The majority of regulated fares are part of a fares "basket". A basket is a way of regulating fares which allows train operators to group similar fares together. This basket of fares is then price capped. This works in two ways: individual fares within the basket are limited by a maximum permissible increase (the 'flex') and the overall average change to the basket of fares cannot exceed the cap.
- B.18. At present the cap on fares increase is applied on 1 January each year and cannot exceed an average change in price of more than Retail Price Index (RPI) plus 1 per cent (based on the rate of inflation in July of the previous year). Train operators may adjust individual fares by up to 5 per cent above the cap (the flex). This means that if a train operator increased some regulated fares by the maximum permissible, it must balance its basket with smaller rises or even reductions in fares elsewhere.

### **Box B.2 – Fares reform: reducing the flex**

Fare flexibility is an important tool for train operators to manage demand and meet local needs. However, in October 2013, the government announced that fares regulation would change, announcing further changes in December 2013. From 1 January 2014, the maximum increase in a regulated fare will be limited to RPI, eliminating the 'flex' available to train operators when setting the level of specific fares and capping the maximum potential price change in January 2014 to an average of 2.8 per cent. From 2015, rail fares will again be subject to an average increase of no more than RPI+1%, with scope for operators to flex specific fares above or below this level.

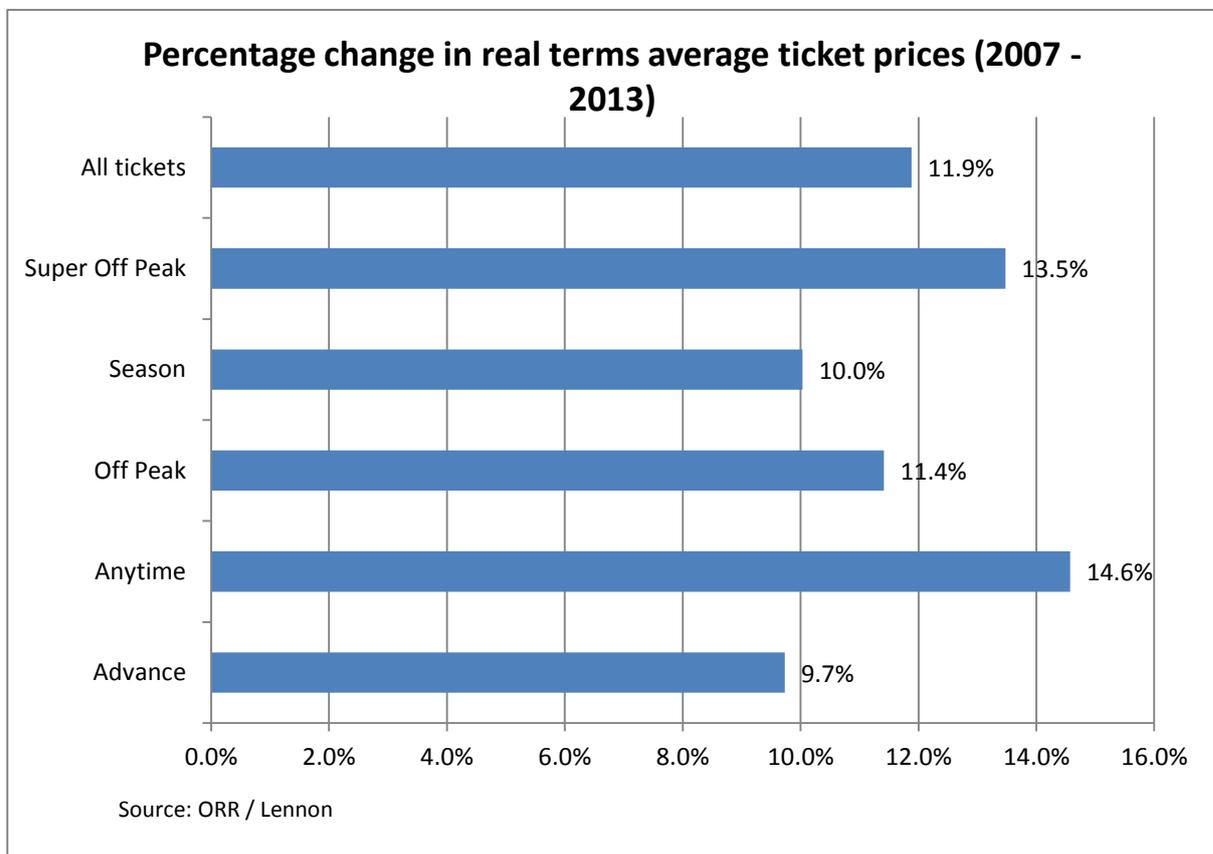
## **Ticketing regulation**

- B.19. Ticketing regulation refers to the industry-wide agreements that all train operators (including open access operators) must follow. These conditions aim to ensure rail services operate as an integrated network, despite the existence of 21 different train operators, in order to:
- (a) protect 'through-ticketing', which allows passengers to travel on different operators' services on a single ticket; and
  - (b) ensure that, from the passenger perspective, the rail network operates as an integrated whole.
- B.20. An integrated network benefits passengers in a number of ways. Train operators with main station ticket office or self-service ticket machines are required to sell tickets "impartially", meaning to sell tickets for a journey on any part of the network run by any other train operator. In other cases, tickets on certain routes must be accepted by any operator (known as inter-available ticketing). There are some exceptions where a train operator may issue a 'dedicated fare', a ticket that is only accepted on their own

services. This usually occurs where two operators run services between the same destinations. Other requirements ensure that all operators participate in the National Rail Enquiries (NRE) service, which is a central source of information for passengers. Finally all services are subject to the National Rail Conditions of Carriage – this is the contract between a train operator and passenger which set out the conditions of travel.

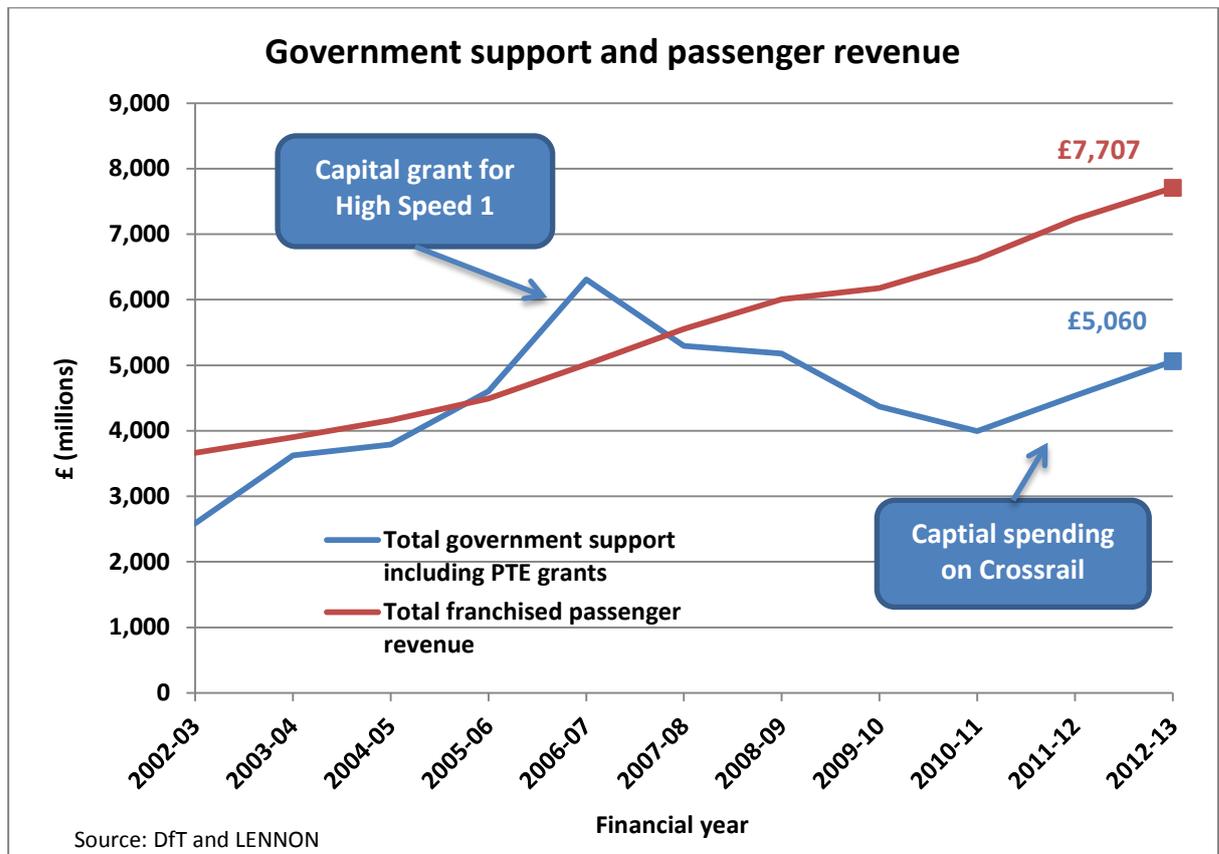
## Rail fares and the cost of railways

B.21. Average ticket prices have risen in real terms, meaning prices have increased by more than the average change in prices for consumer goods and services in the economy as a whole. Season tickets and Advance tickets have seen the lowest level of increase (at 10 per cent and 9.7 per cent on average since 2007). Anytime and super off-peak have seen the greatest real terms increase (14.6 per cent and 13.5 per cent since 2007).



B.22. Passengers are now contributing to more than half (58 per cent) of industry revenue. However, public money continues to support the rail industry. In 2012-13 the public subsidy was £5.1 billion (an increase of £2.5 billion in nominal terms over the last 10 years, much of it to meet the cost of large capital investment projects). Of this £3.8 billion was to Network Rail in the form of direct rail support, £164 million through passenger transport executive grants and £1.5 billion through other elements of government support, which included £1.2 billion capital spending on Crossrail. The

rail industry also returns money to Government, which received £420 million in 2012-13 through franchise agreements.

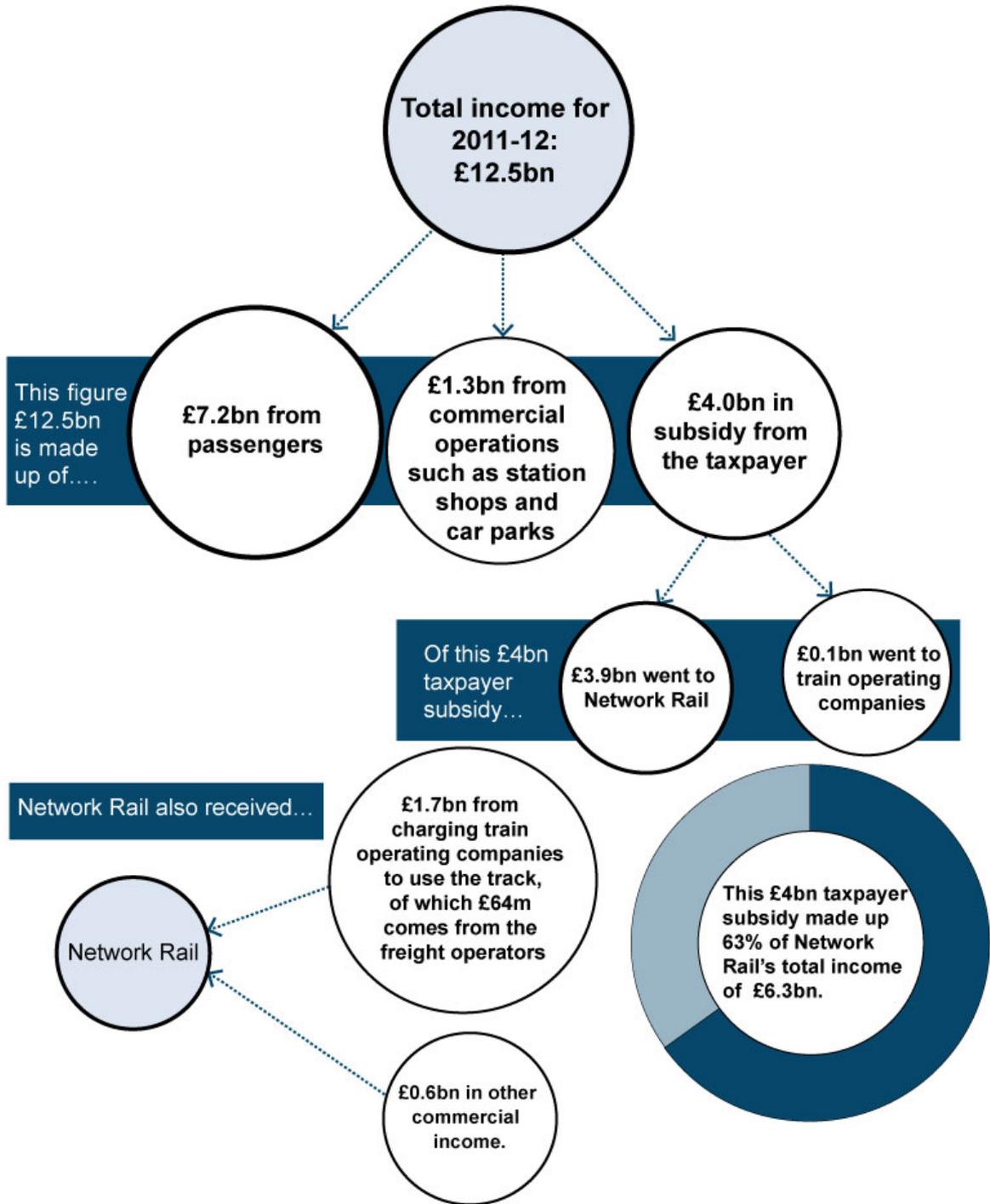


B.23. Although passengers are now contributing more to meeting industry costs, the rail industry remains under scrutiny to reduce the cost at which it delivers rail services. We have recently set Network Rail’s final output and funding requirements for the 2014-19 period, including improvements to efficiency to bring day to day running costs down by 20 per cent by the end of the period.

# Who pays for the railway?

It is our view Network Rail should spend more than £38bn on the railway during Control Period 5 (2014-19). It's our responsibility to ensure that the company uses this money efficiently, and to get a better deal for passengers and taxpayers.

## How the rail industry is funded: 2011- 2012 (in 2011-12 prices)

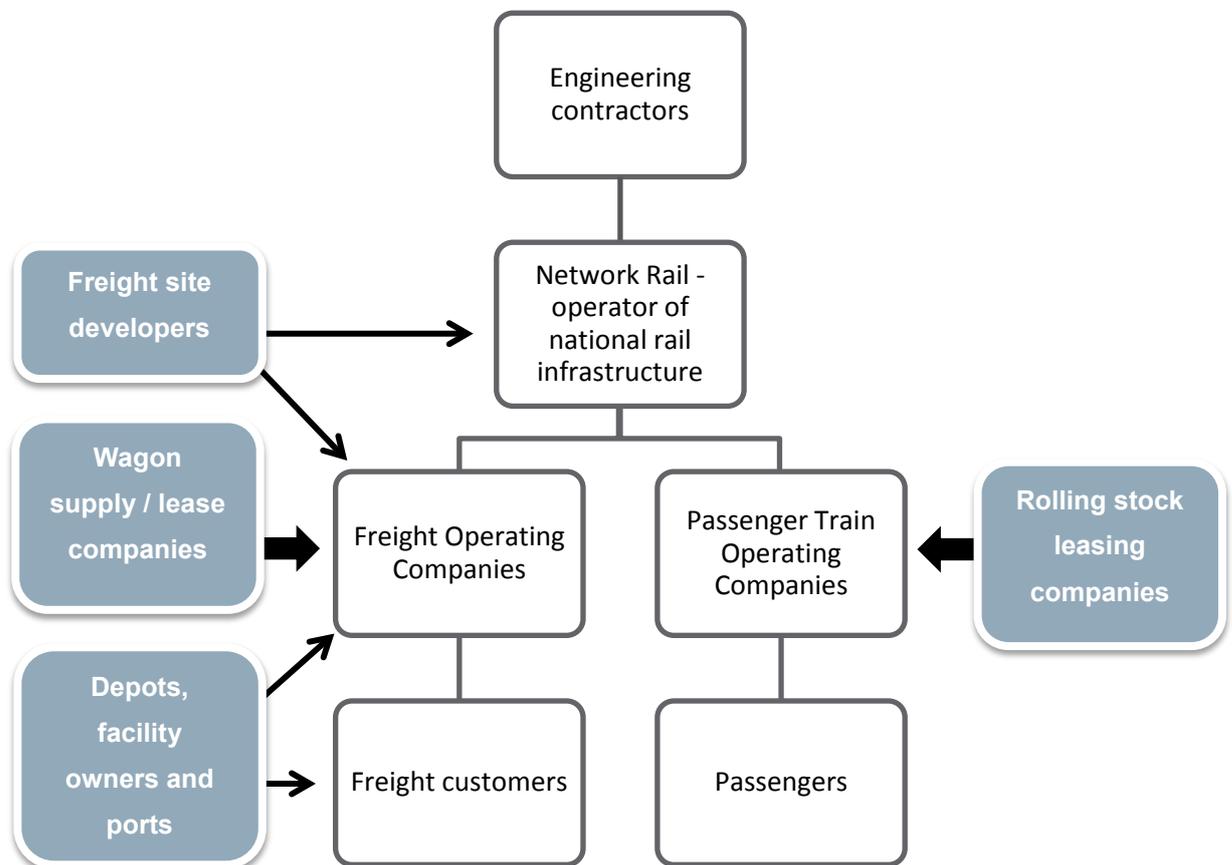


# The wider rail industry

## Industry structure

B.24. The rail industry is organised through the separate ownership and operation of its key services. First, Network Rail owns and operates the rail infrastructure, such as the tracks, signals, bridges and tunnels. It operates many of the mainline stations, with smaller stations leased to the relevant passenger train operators. Network Rail is regulated by the ORR to ensure fair and cost effective access to its infrastructure. Second, the rolling stock (the trains) and train operating companies (that offer either passenger or freight services) are again separately owned and operated. Finally, the industry is supported by firms supplying a range of support services, such as engineering or maintenance facilities. The depots and ports, usually used to deliver freight, may also be owned and operated privately.

Diagram B1 – Structure of the rail industry



## Regulation of the industry

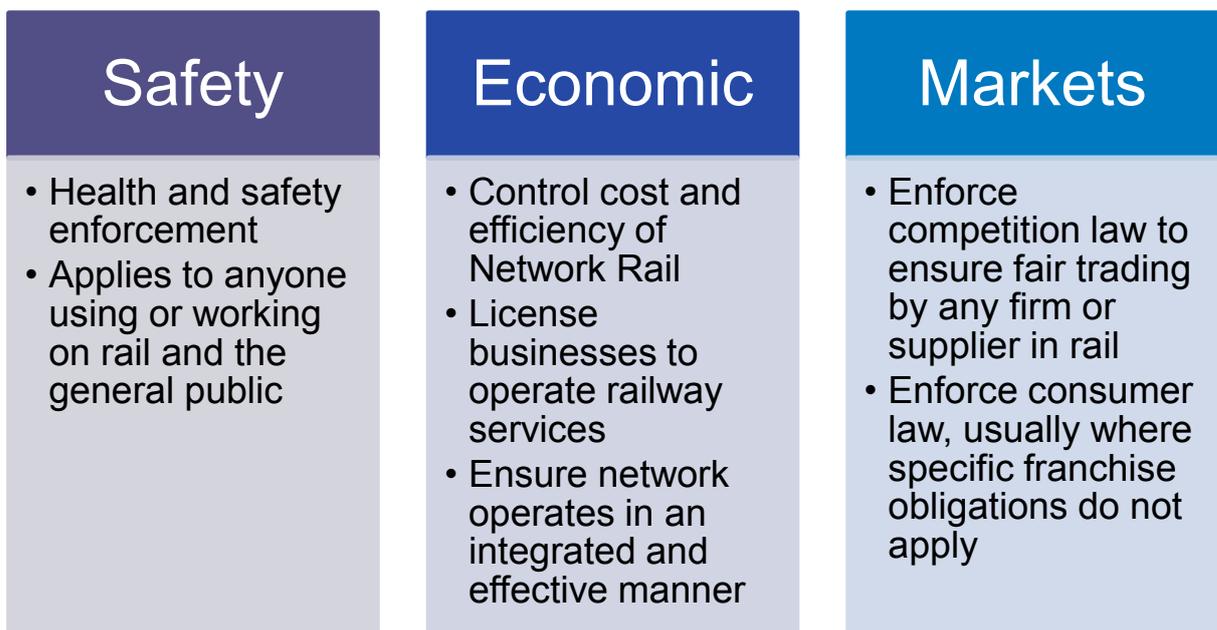
B.25. The complex structure of the rail industry, and its continued reliance on public subsidy, has led to important regulatory roles for government and ORR.

B.26. Government's role, through the Department for Transport and Transport Scotland, is to set the overall strategy for the railways. The government identifies the key infrastructure or routes to develop and the performance and reliability expected of the

railways. The government specifies how much public money it is willing to spend to support this strategy. The ORR sets Network Rail's outputs and funding, drawing on the government's specification and Network Rail, under the scrutiny of ORR, develops a business plan to deliver these outputs. The ORR's role as safety and economic regulator for the industry means it ensures Network Rail's plans are cost effective, whilst ensuring the railways maintain and improve safety.

B.27. The government and devolved administrations also play a role as franchising authorities, awarding franchises following a competitive tender. The franchise sets the performance and service standards that train operators must meet (see paragraph B.3 to B.5 above). The ORR supports the government by protecting the interests of users and funders of railways. As consumer and competition authority the ORR is able to encourage fair trading and take action if passengers overall are being significantly disadvantaged. In addition, anyone using or operating railway services must be licensed by the ORR. The licences contain obligations to ensure railways can offer an integrated service to passengers and freight customers, whilst ensuring fair access to Network Rail's tracks and other infrastructure. The ORR's role is summarised in diagram B2 below.

**Diagram B2 – the safety and economic regulation of the railways**



B.28. In October 2013 the ORR published the final determination of Network Rail's periodic review for 2014-2019. The review, which takes place every five years, sets Network Rail's funding and what the company is required to deliver. Its targets are based on outputs specified the Westminster and Scottish governments, given the funds available. The final determination requires Network Rail to bring down the cost of running the railways by 20 per cent, whilst being funded to deliver nine out of ten

trains on time on regional, London and South East and Scottish services, and improved reliability for long distance passenger services. It will also deliver a programme of enhancements to the rail network worth more than £12bn, involving train operators, stakeholders and passengers in how improvements are designed and delivered. Network Rail will start delivering the plan from April 2014.

# Annex C: Passenger train operating companies

C.1. The table below lists the current passenger train operating companies (as at December 2013), with a brief description of the routes operated. These will be subject to change due to new franchises being let over the next two years.

Owner Group	TOC	Routes
Abellio	Greater Anglia	Local, suburban and express services from London Liverpool Street station to destinations in Essex, Hertfordshire, Cambridgeshire, Suffolk and Norfolk in the East of England
Arriva	Arriva Trains Wales	Urban and inter-urban passenger services to all railway stations in Wales, including Cardiff Central, Cardiff Queen Street, Newport, Swansea, Wrexham General and Holyhead, as well as to certain stations in England
	Chiltern Railway	Services on the Chiltern Main Line from London Marylebone to Aylesbury, Stratford-upon-Avon and Birmingham Snow Hill
	CrossCountry Trains	Radiating out from Birmingham New Street, it operates the UK's longest direct rail service from Aberdeen in the north-east of Scotland to Penzance in Cornwall.
	Grand Central Railway	Operates passenger rail services on the East Coast Main Line from Sunderland to London King's Cross and from Bradford to London King's Cross
Directly Operated Railways (DfT)	East Coast	Operates high-speed passenger services on the East Coast Main Line between London, Yorkshire, the North East and Scotland
First/Keolis Transpennine Holdings	First Transpennine Express	Runs passenger services in northern England linking the west and east coasts across the Pennines, radiating from Manchester and linking cities such as Edinburgh, Glasgow, Liverpool, Sheffield, Hull, Leeds, York, Scarborough and Newcastle
FirstGroup PLC	First Capital Connect	Operates passenger rail services from Luton and Bedford via the Thameslink route to Sutton, Wimbledon and Brighton and out of London King's Cross and London Moorgate to Cambridge, King's Lynn and Peterborough

Owner Group	TOC	Routes
	First Great Western	Operates high-speed services between London Paddington, the Cotswolds, South Wales and the West Country, commuter services in London and the Thames Valley, regional services between south-east Wales and south-west England, and local services in the south-west of England
	First ScotRail	Operates commuter and long-distance services within Scotland as well as some cross-border services to England, including the Caledonian Sleeper
	Hull Trains	Operates seven long-distance services between Hull and London King's Cross, also serving Brough, Howden, Selby, Doncaster, Retford, Grantham and Stevenage.
GOVIA Ltd	London Midland	Operates services on the West Coast Main Line from London Euston to the West Midlands
	Southeastern	Operates the commuter routes to south-east London, most of Kent, and parts of East Sussex
	Southern	Operates services between London and various destinations within East Sussex, West Sussex, Surrey as well as Hampshire, Kent and Buckinghamshire.
MTR Corporation and Arriva	London Overground Rail Operations	Operates the London Overground train service on the National Rail network, under the franchise control of Transport for London
National Express Group PLC	c2c Rail	Operates mainly from Fenchurch Street to Shoeburyness as well as Rainham and Ockendon within Essex and London
Serco Group PLC & Abellio	MerseyRail	Runs services within Merseyside and communities just outside, formed of two lines known as the Northern Line and the Wirral Line, which run underground and interconnect in central Liverpool.
	Northern Rail	Operates commuter, rural and some longer-distance services around Cheshire, County Durham, Cumbria, Greater Manchester, Lancashire, Merseyside, Northumberland, Teesside, Tyne and Wear and Yorkshire.
Stagecoach Group PLC	East Midlands Trains	Runs services in the East Midlands, chiefly in Lincolnshire, South Yorkshire, Nottinghamshire, Leicestershire, Derbyshire and Northamptonshire but also Greater London and North West England

Owner Group	TOC	Routes
	South West Trains	Operates passenger services, mostly out of London Waterloo station, to the South West of London and in the counties of Surrey, Hampshire, Dorset, Devon, Somerset, Berkshire, and Wiltshire and on the Isle of Wight.
Virgin Rail Group Ltd	Virgin Trains	Operates long-distance passenger services on the West Coast Main Line between Greater London, the West Midlands, North West England, North Wales and Scotland.

# Annex D: Online journey planning and ticket retailing

## Rail ‘apps’

D.1. Ticket purchasing focuses on the ability of passengers to use a smartphone app to buy tickets for railway journeys, however some apps offer a joint function of journey planning and ticket purchasing. The table below shows the current live rail ticket purchasing apps for third party sellers and TOCs

**Table D1 – Journey planning and ticket purchase apps**

App	Ticket purchasing app?	Booking/Surplus fees?
<b>Third Party Sellers</b>		
National Rail Enquiries	Yes	No fees
thetrainline	Yes	Booking fee; £1.00 mobile app Surplus fees; £1.50 credit card fee
Red spotted hanky	Yes	No fees
Raileasy	Yes	Booking fee; £2.50 Surplus fee; 4.5%/ 2.5% over £5.00 credit card fee
<b>Train Operating Companies</b>		
Arriva Train Wales	No (only journey planning)	
C2C	No app	
Chiltern	Yes (any UK rail journey)	No fees
CrossCountry	Yes (any UK rail journey)	No fees
East Coast	Travel information app only	
East Midlands	No app (mobile website only)	
First Capital Connect	Yes (any UK rail journey)	No fees
First Great Western	Yes (any UK rail journey)	No fees
First Hull Trains	Yes (any UK rail journey)	No fees
First ScotRail	Yes (any UK rail journey)	No fees
First TransPennine Express	Yes (any UK rail journey)	No fees

App	Ticket purchasing app?	Booking/Surplus fees?
Grand Central	No app (mobile website only)	
Greater Anglia	Yes (any UK rail journey)	No fees
Heathrow Express	Yes (franchised routes only)	No fees
London Midland	No (only journey planning)	
MerseyRail	No app	
Northern	Yes (any UK rail journey)	No fees
Southeastern	No (journey planning only)	
Southern	No app (mobile website only)	
Stagecoach South Western	No app (mobile website only)	
Virgin Trains	Yes (any UK rail journey)	No fees

- D.2. Third party ticket seller apps such as ‘thetrainline’, ‘redspottedhanky’ and ‘raileasy’ offer a joint function of journey planning and ticket purchasing, as do most of the TOC’s apps. The table above shows that 11 of the 21 TOCs have apps offering a ticket purchasing function. These ticket purchasing functions on both the third party seller apps and on the TOCs apps allow passengers to purchase tickets for any rail journey within Great Britain, with the exception of Heathrow Express which only allows passengers to purchase tickets on their franchised route (London Paddington to/from Heathrow) .
- D.3. Only third party ticket seller apps are allowed to impose a booking/surplus fee, with ‘thetrainline’ imposing a £1.00 booking fee and a £1.50 credit card fee whilst raileasy impose a £1.50 booking fee and 4.5% credit card fee or 2.5% if the transaction is over £5.00. TOCs are not permitted by industry rules to charge any additional fees to passengers beyond the face value of the ticket.

## E-ticketing

- D.4. E-ticketing allows passengers to either print their own ticket at home, or to have a ticket on a smartphone which can then be scanned on the train and at the ticket gates. Recently, more TOCs have incorporated the function of mobile ticketing (m-tickets), allowing passengers even more convenience in being able to purchase their rail ticket online or via an app which is then uploaded onto their smartphone, taking away the need to queue to print the ticket either at a ticket machine. The table below shows available ticket purchasing websites either third party ticket sellers or TOCs, and whether they offer any form on e-ticketing.

Website/Operator	E-ticketing function?
<b>Third Party Sellers</b>	
thetrainline	Yes; m-tickets + print at home Print@home only available on; all CrossCountry routes, all East Coast routes, selected East Midlands routes, selected First Great Western routes, all Grand Central routes, all Greater Anglia routes, all Hull Trains routes and all Virgin Trains routes. M-tickets only available on; the majority of CrossCountry routes, all Greater Anglia routes, all Hull Trains routes and all Virgin Train routes
<i>Red spotted hanky</i>	No
<i>Raileasy</i>	No
<b>Train Operating Companies</b>	
Arriva Train Wales	No
C2C	No
Chiltern	Yes; m-tickets + print at home tickets (All Advance fares + a number of commuter routes)
CrossCountry	Yes; m-tickets + print at home tickets (Print at home tickets for CrossCountry, Grand Central + Virgin Trains Advance tickets)
East Coast	Yes; print at home tickets (Print at home tickets for EC Advance fares on EC trains)
East Midlands	No (smartcard)
First Capital Connect	Yes; m tickets (via app) (Cambridge-Kings Lynn-London Kings X only)
First Great Western	Yes; m-tickets + print at home tickets (Advance fares on FGW trains only)
First Hull Trains	Yes; m-tickets + print at home tickets (Advance fares on their routes only)
First ScotRail	Yes; m-tickets + print at home tickets
First TransPennine Express	Yes ; m-tickets + print at home tickets (Advance tickets on TPE services only)
Grand Central	Yes; print at home tickets (Grand Central and CrossCountry advance tickets only)
Greater Anglia	Yes; m-tickets + print at home tickets (Advance fares on certain routes only)

Website/Operator	E-ticketing function?
Heathrow Express	Yes; m-tickets + print at home tickets (Route only)
London Midland	No
MerseyRail	No
Northern	Yes; m-tickets + print at home tickets (Certain Northern Rail routes only)
Southeastern	No
Southern	Yes; print at home tickets (Only available for services between Gatwick Airport and London Victoria)
Stagecoach South Western	Yes; m-tickets + print at home tickets (Only available on certain routes)
Virgin Trains	Yes; m-tickets + print at home tickets Available for all Advance tickets when travelling exclusively on Virgin Trains and/or Cross Country (print at home) and Virgin Train Advance fares (m-tickets)

## Mobile ticketing

D.5. The majority of TOCs offer mobile tickets, allowing passengers to have their ticket on their smartphone to be scanned both on the train and at the station. However there are limitations to the use of mobile tickets, as noted in the table, with all of the TOCs only allowing mobile tickets to be valid on certain routes and mainly on Advance fares, with the same being the case for third party ticket seller 'thetrainline'.

## Print at home tickets

D.6. Again, the majority of TOCs offer print at home tickets, with many offering this ticket type for Advance fares and certain routes only. The same goes for the third party seller, 'thetrainline' who offers print at home tickets only for Advance tickets and only be for journeys with certain TOCs.

D.7. The majority of the TOCs which offer e-ticketing functions clearly set out the terms and conditions for the use of the e-tickets e.g. what routes they can be used on and what fares they are valid for. Many of the TOCs websites offer the e-ticket options which are applicable for that passengers' route when going through the booking process, so if a print at home ticket is valid for their route then it will tell them, providing the passengers with further information on what ticket options are available to them.

# Glossary and terms used

Terms and abbreviations	Definition
Apps	Applications available for mobile phones and tablets
Passenger Assist	Service disabled passengers can book ahead for travel assistance to board or disembark from a train
ATOC	Association of Train Operating Companies
BoE	Bank of England
C.I.Ps	Customer Information Plans
CaSL	Cancellations and Significant Lateness (where significant lateness means more than 30 minutes late)
Concession	A fee paid by the government or local authority to train operators to supply rail services
Consumer	An individual purchasing a service for themselves for personal use, including individuals buying for other people. Passengers are consumers of rail services.
CPI	Consumer Prices Index, an official measure of the general changes in prices across the economy (price inflation)
Delay Repay	Compensation arrangements for passengers if their rail service is delayed
DfT	Department for Transport
DPPP	Disabled People's Protection Policy
E-tickets	Tickets in an electronic form such as ones available to print at home or readable from a smart phone
Fares regulation	Clauses in train operators' franchise agreements that specify the range of fares operators must offer and the limits to changes in fare levels
LDRP	Long Distance Recovery Plan, the plan proposed by Network Rail to address concerns with performance following ORR enforcement action
LENNON	'Latest earnings nationally networked over night' – the rail industry's central ticketing system
London TravelWatch	An organisation that campaigns for improvements to transport in London for the benefit of passengers.

Terms and abbreviations	Definition
MAA	Moving annual average, for rail calculated as the average of the last 13 four-week time periods of PPM
McNulty Report	The Rail Value for Money Study published March 2012
National Rail Conditions of Carriage	Contract between a train operator and passenger which set out the conditions of travel
NRPS	National Rail Passenger Survey, a twice yearly survey conducted by Passenger Focus
NTS	National Travel Survey, an annual survey of peoples' travel habits conducted by DfT
NR	Network Rail, the operator of Britain's rail infrastructure
NRE	National Rail Enquiries
Ofcom	The government approved regulatory and competition authority for the broadcasting, telecommunications and postal sector.
Off-peak	Outside peak hours of travel
ONS	Office of National Statistics
Open access operator	Train operators who operate solely on a commercial basis rather than a concession agreement.
ORR	Office of Rail Regulation
Oyster Card	A London travel scheme used for travelling on buses, trains, the underground and boats
Passenger charter	A document outlining important information for passengers including compensation arrangements and contact details
Passenger Experience Metric	Combining the results of Passenger Focus' National Rail Passenger Survey of satisfaction with an independently audited assessment of the standard of facilities and services provided by the operator. The set of indicators used to measure the quality of facilities and services onboard trains and at stations (called QuEST) has been drawn up with the help of Passenger Focus and is a modification of the tried-and-tested SQUIRE (Service Quality Incentive Regime) process used by Transport Scotland for the ScotRail franchise.
Passenger Focus	Independent passenger watchdog in the rail and bus industry.
Peak	The busiest travel times (8am-10am, 4pm-6pm)
PPM	Public Performance Measure
QuEST	See passenger experience metric

Terms and abbreviations	Definition
Rail franchise agreement	An agreement between government and a train company to allow it to run services within a specified region for an agreed period of time. Franchisees must meet agreed service standards, but in return collect all revenue from passenger use
Redress	Compensation or other action to remove or reduce any harm or loss experience by passengers, for example where a service was not delivered to any agreed standard
Regions	Geographic areas of the UK, as defined by the ONS. Formerly known as Government Office Regions
RPI	Retail prices index, a measure of price inflation
Sectors	<p>Defined geographic areas based on franchised areas at the time of privatisation. The original sectors were:</p> <ul style="list-style-type: none"> <li>• London and South East - based on the British Rail Network SouthEast services which were principally commuter trains in the London area and the inter-urban services in South East England, although the network did reach as far west as Exeter.</li> <li>• Long distance – based on the British Rail InterCity services which were long-haul express services.</li> <li>• Regional – based on the British Rail Regional Railways services – which were all other services that did not fit into the two above sectors.</li> </ul> <p>The initial split has been adjusted following changes to franchises, including introducing a Scotland and Wales region.</p>
SQUIRE	Service Quality Incentive Regime (see passenger experience metric)
T&Cs	Terms and Conditions
Ticketing regulation	Conditions in place to ensure rail services operate as an integrated network regarding ticketing.
TOC	Train operating company
ToR	Terms of Reference
Transaction	The process by which money is exchanged for a described good or service. The transaction may involve a number of steps including deciding on needs, comparing service quality and prices, selecting a service, delivery of a service.
TVMs	Ticket Vending Machines, machines located at rail stations offering a (limited) range of tickets and allowing pre-paid tickets to be collected by passengers

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**OGIL**