Williams Rail Review

The user experience of the railway in Great Britain

Evidence paper

March 2019

This paper provides an overview of the experience of railway users (both passengers and freight) in Great Britain. The Review will draw on this evidence in the subsequent phases of its work.

Similar papers on other key rail issues are being published as part of the Review – including on the role of the railway in Great Britain, and the organisation of the railway in Great Britain and other countries.

Alongside these evidence papers, the Review is issuing a new phase of its ongoing Call for Evidence process – with a deadline of 30 April 2019. This will seek views on the evidence and wider issues presented by the Review to date and on our proposed objectives and assessment criteria.

The Review will continue to engage widely with people using and working on the railway.

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1. Introduction

1.1 The railway is part of everyday life in Great Britain; it helps us get to work, stay in touch with friends and family, and access vital services like healthcare and education. Rail keeps the economy working by moving people and goods quickly and cleanly.

1.2 Passenger numbers have experienced unprecedented growth since the early 1990s, with the number of franchised passenger journeys more than doubling from 735 million in 1994-95 to 1.71 billion in 2017-18.[1]

1.3 While Great Britain's railways have seen significant growth over recent decades, that growth has slowed more recently; in 2017-18 passenger journeys fell by 1.4% compared to 2016-17.[2] [3] In 2017, approximately 9% of domestic freight was moved by rail.[4] This is compared with 6% at privatisation of the railway, but has fallen from a 13% post-privatisation peak in 2014-15.[5] In 2016-17, rail freight transported goods that would otherwise require 8.22 million HGV journeys, resulting in 1.78 billion fewer HGV kilometres.[6]

1.4 Since privatisation there has been significant investment in stations, rolling stock and track. However, many passengers are not getting the experience they expect from rail travel with satisfaction now at its lowest in 10 years.[7]

1.5 Recent passenger experience has not been good enough. Delayed delivery of major infrastructure enhancements and the failed introduction of the May 2018 timetable have negatively impacted railway performance, passenger satisfaction and public trust.

1.6 The significant disruption of 2018 was experienced on top of the issues that customers see day-to-day. Great Britain's rail network is near or above capacity in some areas, meaning that the network is not always able to offer passengers the experience they expect, and that even minor disruptions can have significant impacts.[8] Freight operators are often unable to secure the level of access to the network that would enable them to grow their businesses and enable their customers' businesses to expand.

1.7 The Call for Evidence submissions we have received from passengers, the industry, devolved and local administrations, and business groups, and all the meetings we have held, point to the need to put customers at the heart of the industry. For the public, there is a clear sense from our research that this is not currently the case; we found respondents were sceptical that the industry has the capability or motivation to deliver the changes customers expect.[9] This undermines trust in the system.[10]

1.8 This paper assesses the current evidence on user experience from a passenger and freight customer perspective; explore the impact of experience on public trust; and evaluate how current policy works on the ground for the passenger.

2. Who are the users of the railway?

2.1 Broadly, there are two types of user of the railway: passengers and freight customers. This section focuses on passengers and explores the expectations and experiences of different types of passenger. Freight customers are discussed in Chapter 7.

Passengers

2.2 Almost two-thirds (64%) of adults in Great Britain use the train at least once a year.[11] Those who are male, in their 30s, have a high household income and live in an urban area tend to use rail most often.[12] However, this conceals a significant level of variation. Different customers have different priorities; the railway is expected to deliver for each of these passenger groups alongside economic and social benefits for the country as a whole.

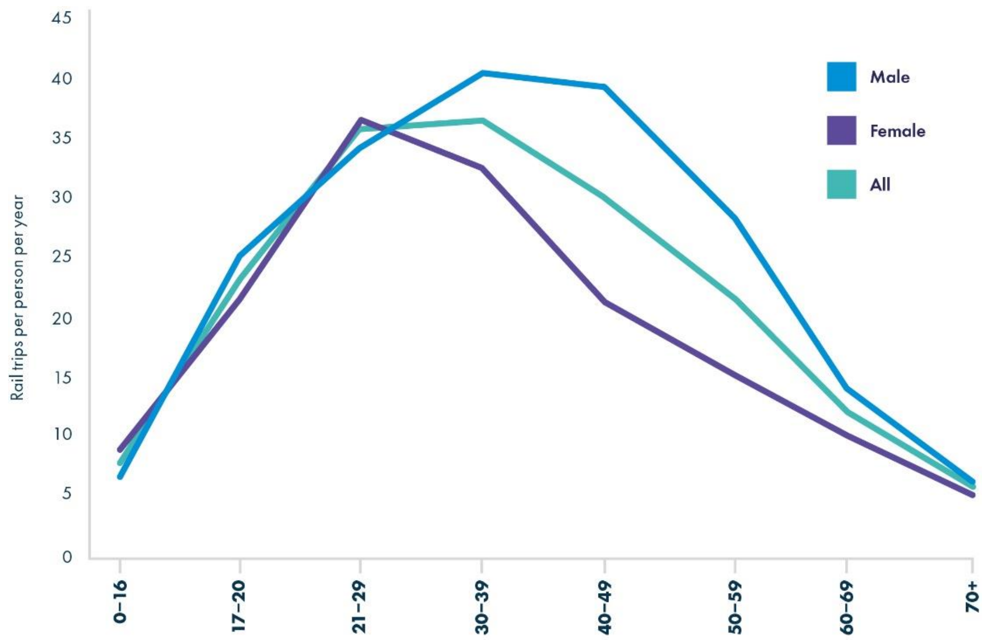

Figure 1. Rail trips by age and gender, England (2017)[13]

2.3 The National Travel Survey enables the monitoring of personal travel trends of households in England. It shows that younger people are more likely to use rail: those aged 30-39 in England made the most rail trips in 2017,[14] while the 21-29 age group made the most trips in the previous two years. It also found that men make 30% more trips on average than women.[15]

Regional trends

2.4 Perhaps unsurprisingly, location has an impact on railway usage. Rail travel on operators covering London and the South East accounts for 69% of all franchised passenger journeys in Great Britain.[16]

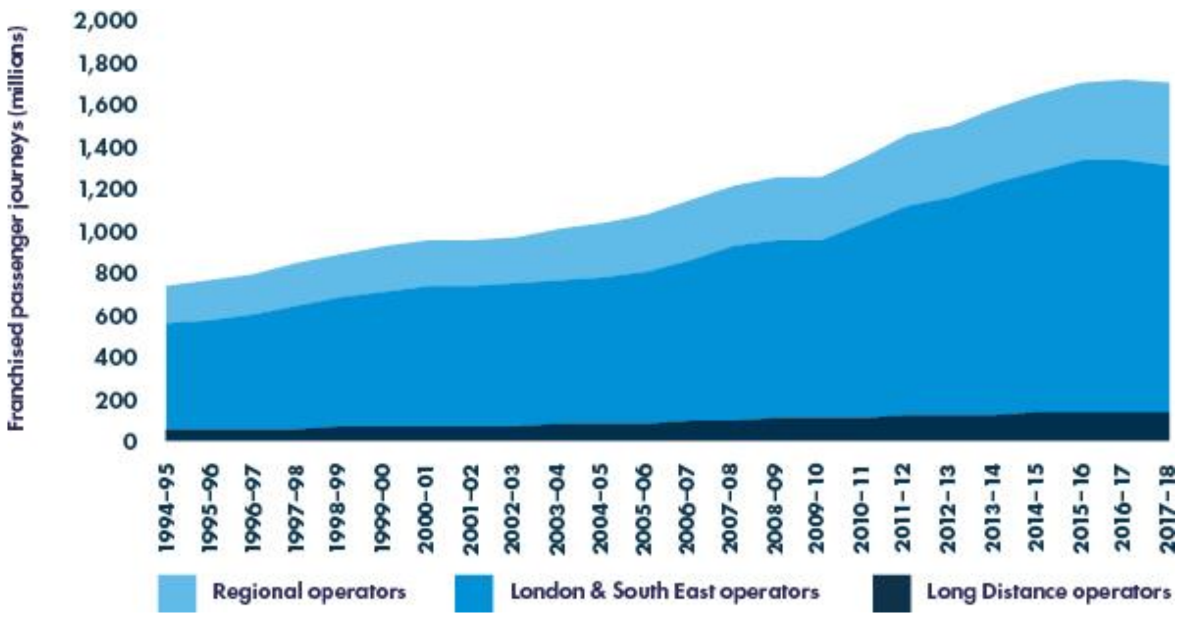

Figure 2. Rail demand by sector[17]

2.5 However, in 2017-18 operators in London and the South East recorded the first fall in passenger kilometres travelled since 2009-10, and passenger journeys also continued to fall.[18] It has been suggested that industrial action, severe weather, and network engineering closures contributed to the decline, although there is no definitive data as yet. Growth is returning in 2018-19, with the latest statistics showing growth of 2.9% in franchised rail journeys for Q3 2018-19 versus Q3 2017-18.

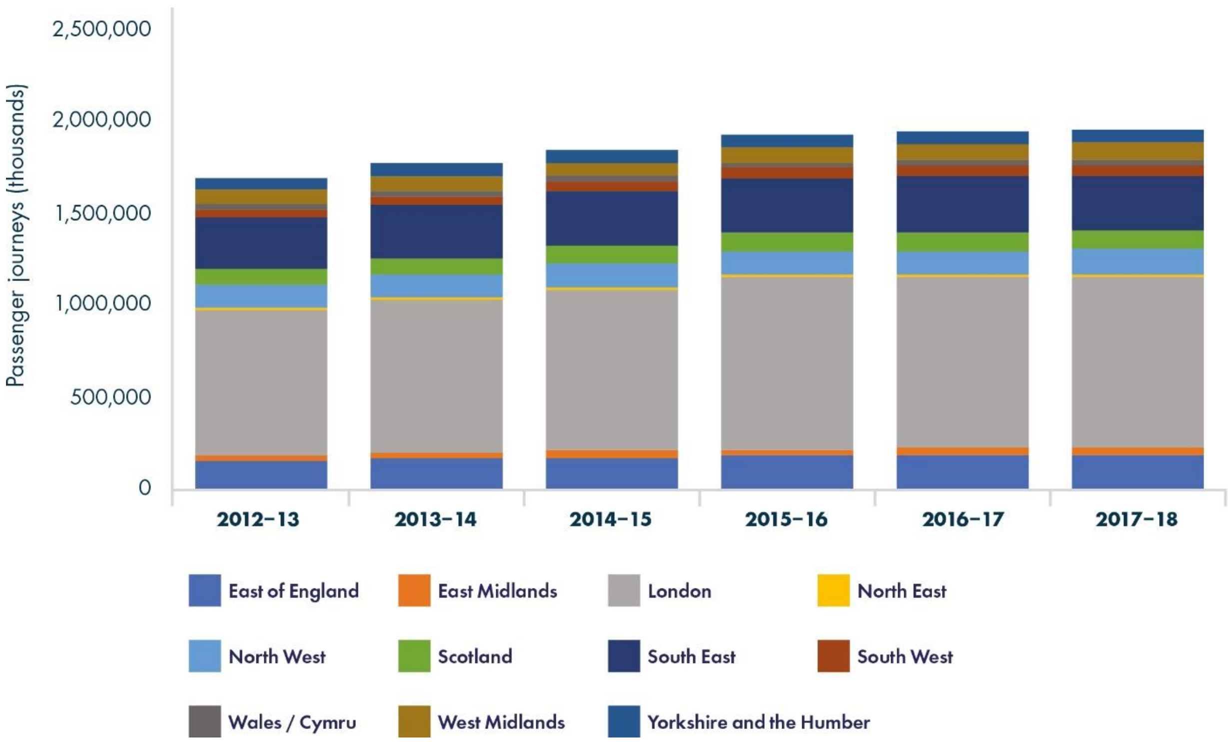

Figure 3. Rail demand over time by regions[19]

2.6 London, which has the highest rail demand of all regions,[20] saw a decline in passenger journeys to 926.5 million in 2017-18, a decrease of 3.9 million since 2016-17.[21] One of the contributors to the fall is the reduction in passenger journeys on Govia Thameslink Railway (GTR) and South Western Railway (SWR) which experienced industrial disputes, planned cancellations and one-off engineering works.[22] The largest growth of all regions was seen in Scotland with a 3.2% growth compared to 2016-17.[23]

2.7 In contrast to London and the South East, the Long Distance and Regional sectors recorded growth in passenger journeys in 2017-18, though growth slowed to less than 1%.[24]

2.8 The number of journeys between regions increased in 2017-18, except to/from the South West. The largest contribution to the overall change was journeys to/from London, with over 3 million more journeys made in 2017-18. Journeys within regions remained at a similar level to 2016-17.[25]

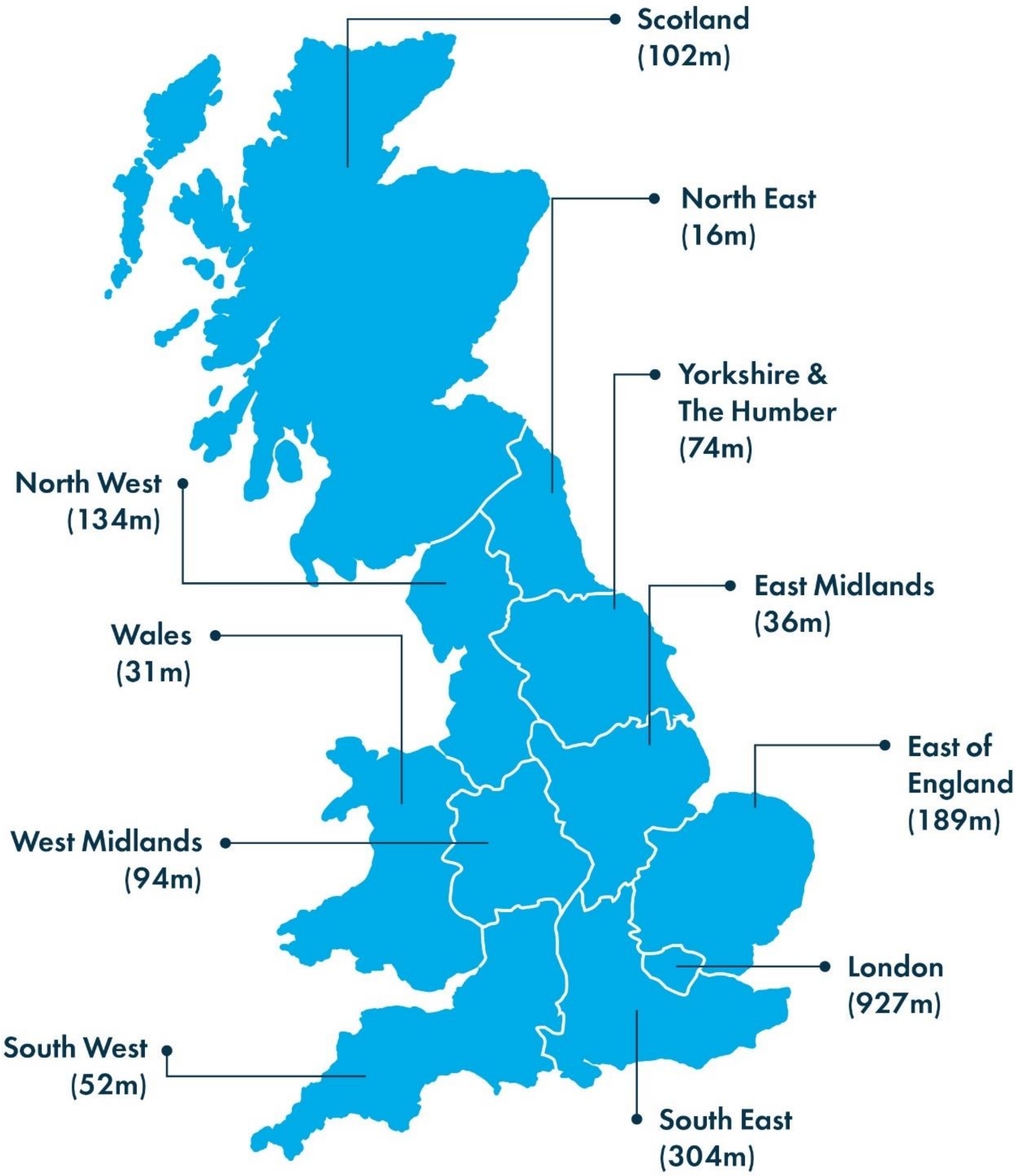

Figure 4. Total passenger journeys by region (2017-18)[26]

Why are passengers travelling?

2.9 Most rail journeys connect people to work or education (commuting); the next most common reason for taking the train is to access leisure; smaller proportions of journeys are for business, shopping and other reasons. This mix has remained broadly unchanged since 2002.[27]

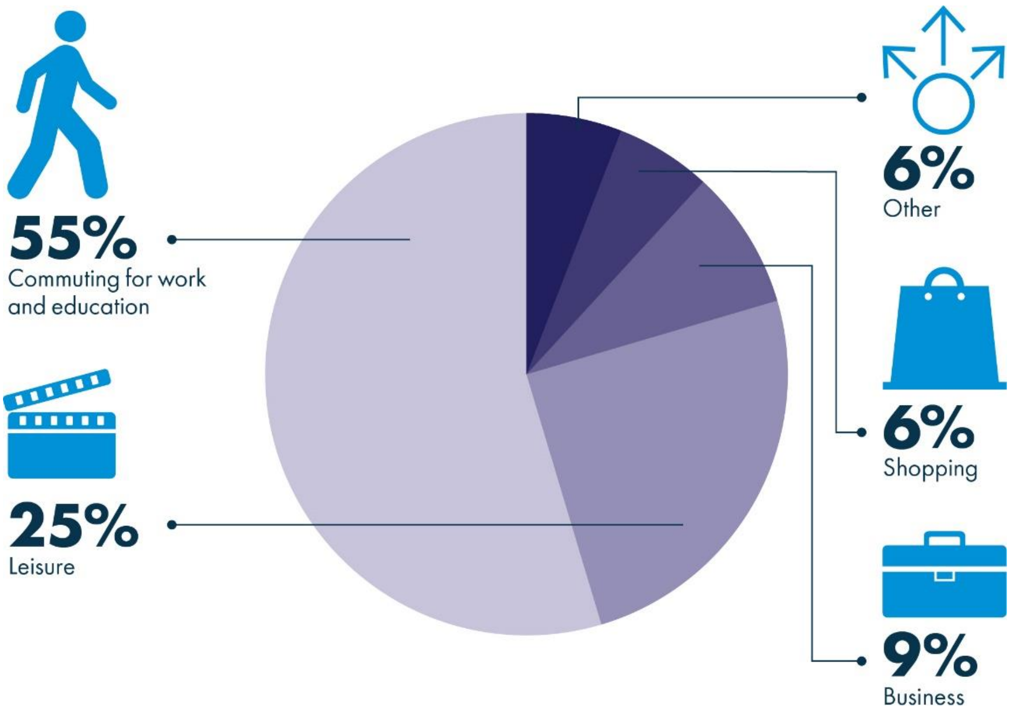

Figure 5. Rail demand by journey purpose (England, 2017)[28]

2.10 Research shows that the needs of rail passengers differ depending on the reason for their journey. This section explores how journey purpose drives differing passenger experiences.

Commuters to work and education

Commuters make up the majority of rail passenger journeys in Great Britain. Commuters are often negative and frustrated about the service they experience. They are more likely to travel when the network is at its busiest and so experience issues such as overcrowding. They are also more sensitive to time pressures and so are frustrated by delays and cancelled services.[29]

Issues on the rail network can impact both their work (for example, being regularly late to work) and personal lives (for example, not getting home to spend time with family).[30]

Commuters' frustration is exacerbated by a perceived lack of progress in addressing poor service experience.[31] There is very limited awareness of any attempts to develop the service in response to pressure from increased demand.[32] Recent disruptions have exacerbated commuter frustrations and are especially acute for those using rail to access London and Manchester.[33]

Research found that in London particularly, some passengers feel that the service is on a downwards trajectory,[34] most likely resulting from the May 2018 timetable disruption. However, while the Public Performance Measure (PPM – see Chapter 9) in the London and South East sector did fall every year from 2009-10 to 2016-17, it increased in 2017-18.[35]

Commuters' main priorities for improvement are: reliability, better handling of delays, and reducing overcrowding.[36]

For many commuters, alternative means of travel are either not an option or not desirable,[37] as rail offers an advantage over other modes such as:

- Speed: Often the fastest way of travelling, especially into major cities, connecting people to wider employment opportunities.
- Connectivity: Ability to work on-the-go with Wi-Fi[38] and/or connect with friends and family during their commute.

Business and leisure

Business and leisure passengers are far more positive about train travel than commuters because they often have greater flexibility in when they can travel which means they can avoid some of the negative issues commuters experience during peak periods.[39]

Business and leisure passengers are generally more satisfied with the service they receive because they consider it offers:

- Speed: Often the fastest way of travelling – particularly over long distances.

- Fun: Leisure passengers can have a sense of occasion.
- Convenient: Mitigates the complications of parking and potential traffic.
- Relaxing: Can be a relaxing and less stressful way of travelling.[40]
- Connectivity: Business traveller are able to work on-the-go with Wi-Fi[41] and/or connect with friends and family during their journey.

Business and leisure travellers' main priorities for improvement are: cost, getting a seat, arriving on time, and understanding the ticketing options available to them.[42]

Non-users

Typically, those who do not use rail tend to rate the industry overall less positively than users.[43] We discuss non-users perceptions further on in the paper in Chapter 3.

3. Public understanding and trust

3.1 Public trust in most of our major institutions is currently low across society, and the railway is no exception.[44] Distrust of the rail industry has worsened among passengers according to the latest figures from the Which? Consumer Insight Tracker.[45] Distrust now stands at 37%, 13 percentage points higher than three years ago.[46] The Which? tracker found only second-hand car dealers are more distrusted by consumers.[47] In 2017, research carried out by Transport Focus showed the rail sector is regarded less positively than the NHS, supermarkets and airlines but ahead of banks and the energy sector.[48]

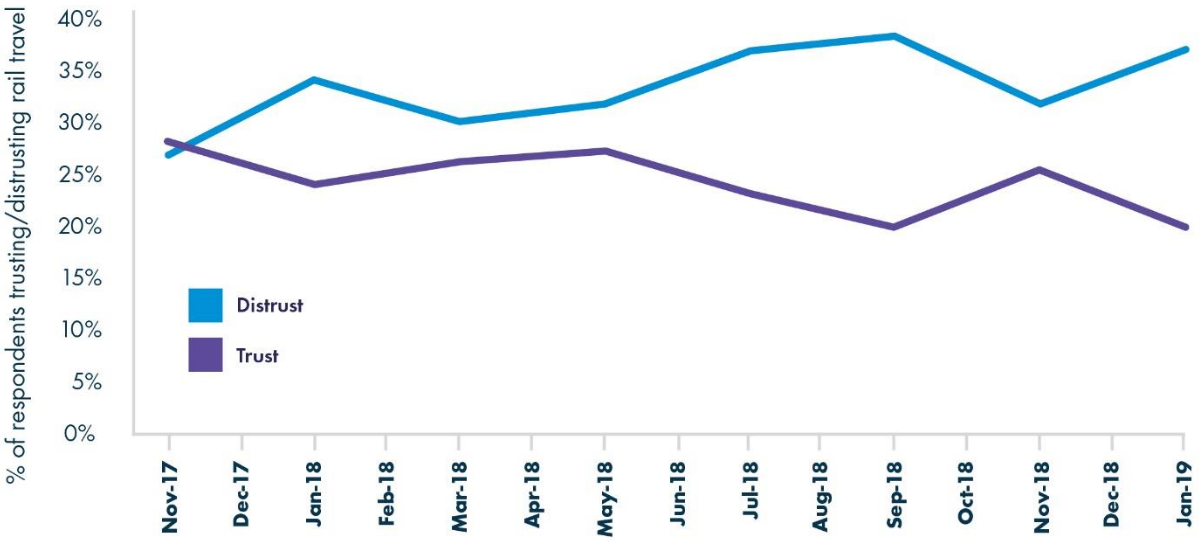

Figure 6. Trust and distrust in rail travel[49]

3.2 There has been an increase in negative media about the rail industry, for example during the May 2018 timetable disruption and the failure of the East Coast Franchise. The actual experience of travel has also worsened, with fewer passengers now saying that rail travel is punctual and reliable.[50] We discuss the area of performance further in Chapter 9.

Understanding the drivers of trust in the railway

3.3 As part of the Review, we commissioned Britain Thinks, a research agency, to identify factors that build or undermine trust in rail and explore attitudes towards current organisational structures, and the impact these have on trust.

Method

3.4 The qualitative study focussed on getting a mix of frequent and non-frequent users from across Great Britain, with a spread of age, ethnicity and socio-economic group.

Figure 7. Our research methodology[51]

Key findings

3.5 Respondents do not believe that they are at the heart of the railway and feel they do not come first, leading to a lack of trust in the sector.[52] The research found that public trust in the railway is developed in two ways; direct experience and wider media narratives. The impact this has in shaping trust in the rail system is twofold:

- Positive experiences are more likely to be undermined and dismissed as ‘lucky’.
- A bad experience feels like it might be part of a bigger pattern of dysfunction.

Competence

3.6 Customer experience is the dominant lens through which the railway is judged.[53] There is a strong feeling that the railway is simply unreliable, especially for time critical journeys:

> *“I don’t take the train if I’m going to the airport or if I’m going on holiday as I don’t know if I’ll get there in time.”*

3.7 Passenger frustration is particularly acute in relation to events which are seen to be in the operators’ control, for example, the failure of staff to show up for work or expected seasonal conditions such as leaf fall affecting services by reducing speeds.[54] Some respondents gave personal examples of how they would take an earlier train to ensure they were able to make a meeting, while others spoke about the personal impact train delays had on their or their loved ones’ lives.

3.8 The majority of delays and cancellations are thought to be down to a lack of competence and customer-first mindset.

Motivation

3.9 Perceived high prices and complicated price structures raise suspicions that some passengers are not getting value for money. Pricing structures that are seen to be inconsistent and opaque contribute to a feeling that cost and service are not related, and that the system exploits captive markets:

> *“There has been a massive increase in train fares but I haven’t seen an increase in the level of service so I don’t see how they can justify that when it’s getting worse not better.”*

3.10 Alongside fares and ticketing, the research found that some passengers find the process of travelling by train stressful, and anticipate or have issues at every stage of the customer journey.

Figure 8. The customer experience can be stressful at various points throughout the journey[55]

Leadership and accountability

3.11 The research suggests that the public do not understand how the rail system works, know who is accountable, or more importantly, where to turn for support. There was a feeling of a lack of leadership and accountability within the rail industry.[56]

3.12 Respondents felt that that several players are involved and all blame each other for problems in the industry.[57] There was also a lack of awareness of any strategic plan or vision for the railways, with a lack of progress felt by passengers.[58]

Ownership

3.13 Some responses to the Review's Call for Evidence discuss renationalisation of the railway.

3.14 While not the core focus of our research, we asked respondents about the extent to which the structure of the industry – including public ownership – impacted their feelings of trust in the railway. Views were mixed. For some, renationalisation would reduce the profit motive and reduce the fragmentation of the industry, which in turn would help it to focus on delivering a high-quality service. However, for others, there is significant concern about the competence of the public sector to directly operate the railway, and of the potential for the railway to become a 'political football'.

4. The railway and social inclusion

4.1 Public transport, including rail, plays an important role in ensuring everyone can participate in society including those with additional accessibility needs, and disadvantaged or vulnerable groups. Despite the consistent growth in rail usage since privatisation there remain many obstacles to achieving access for all to the railway. This chapter will discuss the current evidence across four aspects of inclusion and the railway; socioeconomics, disabled people, communities, and the less frequent users of rail.

Socio-economics

4.2 Income has an impact on the frequency an individual travels by rail. While rail use in England has increased in all income groups over the last 15 years, those in the highest quintile consistently travel more than other groups: at least twice as much as the national average for 12 of the last 16 years (2002-2017 inclusive).[59] This reflects both rail's fit with white-collar commuters' need to travel to their work often in major cities, and their ability to pay for rail fares due to their higher income (see Chapter 8).

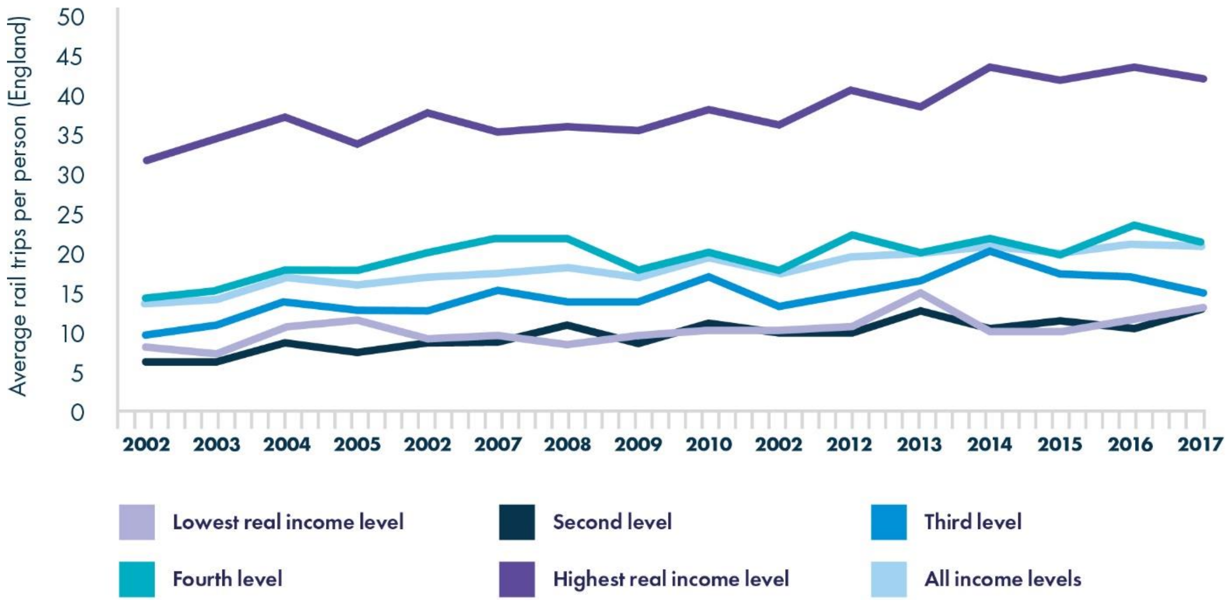

Figure 9. Average rail trips per person by income level[60]

4.3 Research for the Joseph Rowntree Foundation found a general tendency for those on lower incomes to dismiss rail travel (train or tram) as a viable mode for commuting because of the perceived expense.[61]

4.4 To narrow the gap between rail usage of high and low-income groups, rail would need to be perceived to be a viable option for lower-income passengers, offering affordable fares that are competitive against other modes, which represent good value for money and enable journeys people want to make. The government and industry has worked to address this usage gap and make the railway more inclusive across all users and non-users. An example of this is through the introduction of railcards – including most recently for 16-17 year olds.

Disabled people

4.5 Within Great Britain, users with a mobility difficulty made around two and a half times fewer trips per year on average by rail compared to those with no mobility difficulty in 2017.[62] This trend is broadly in line with all modes.

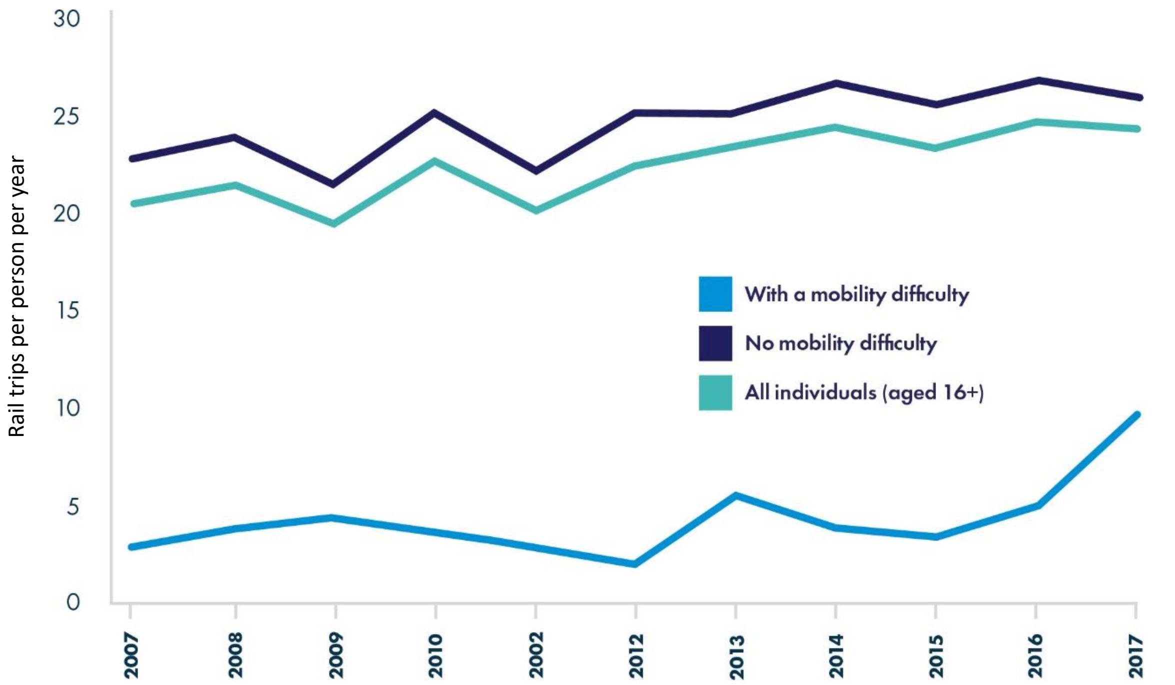

Figure 10. Average rail trips per person by mobility status[63]

4.6 Disability affects 13.9 million people in the UK, including visible (sometimes requiring physical aids) or less visible disabilities (for example, cognitive or sensory impairments).[64] These groups have a range of needs that require a robust strategy to improve accessibility. These go beyond providing step-free access, to include improvements such as signage for wayfinding, customer information and facilities (for example toilets), and staff training.

4.7 With evidence suggesting that disabled passengers would like to use the railway more than they currently do, there is scope to do more to improve the confidence of disabled passengers to use the railway.[65]

4.8 Many positive steps have been made in recent years to improve the experience for disabled passengers including the introduction of the 2010 Equality Act. Another initiative is the Disabled Persons Railcard. Ownership of a Disabled Person Railcard[66] has grown 7.4% at the end of 2017-18 compared to the previous year, with 223,000 now in use. The paper discusses the accessibility of infrastructure in Chapter 10.

4.9 The number of journeys made by people with a mobility difficulty has nearly doubled in the past year – today people with a mobility difficulty make over three times as many rail journeys per year than in 2007.[67]

Communities

4.10 Rail plays an important part in connecting communities, with the local rail station often at the heart of cities and towns. There are initiatives to improve stations and help communities through community partnerships. Starting as a grassroots movement to identify and improve neglected parts of the network, Community Rail has flourished into a UK-wide programme. It involves initiatives from people in the local community to engage with the railway, for example helping to maintain station gardens. There are around 60 Community Rail Partnerships and Station Adoption Schemes.[68]

4.11 Community rail presents opportunities for local people to become involved in rail by volunteering, assisting in community rail projects and supporting local stations. It can support social and economic development and help support diversity and inclusion within communities. It can also provide a forum for communities to have a say on decisions that affect their local rail services.

Less frequent users of rail

4.12 The views of those who use the railway less frequently or not at all are important for two reasons. First, attracting more people to use the railway more often where there is spare capacity creates additional social and economic benefits for the country. Second, as taxpayers we all fund the railway – it is therefore important that there is a good level of confidence in it.

4.13 Those who do not use the railway have a less positive view of the industry overall compared to users.[69] Transport Focus found that less than one-fifth of non-users are positive towards rail.[70] The National Travel

Survey found that almost two-thirds (65%) of short-distance rail users rated the overall quality positively compared to 56% of non-users.[71]

Barriers for infrequent and non-users

4.14 The main reasons for not using trains more often are cost and convenience.[72]

4.15 Almost half (48%) of Short Distance users and two-thirds of Long Distance users said that cheaper fares would be an improvement that would encourage them to use rail more often.

4.16 Almost half (49%) of Short Distance infrequent users said it was easier to use a car than travel by train.[73] For Long Distance rail users, the main reason for not using trains more often was that it was easier to use alternative modes (36%).[74]

5. A safer railway for all

5.1 The railway has seen major improvements in safety over the last decade.[75] Rail remains one of the safest forms of transport in Great Britain[76] with no railway passenger or worker fatalities due to a mainline train accident for 11 consecutive years.[77] Passengers are able to take safety as a given. The latest assessment by the European Union Agency for Railways, based on data for 2012-2016, also shows the UK to have the best safety record of the 10 largest European railways.[78]

5.2 While operational safety on the railway has improved, personal safety on board trains and at stations is cited as a concern in some cases. In 2016, government launched its nationwide “See It. Say It. Sorted” campaign to encourage train passengers and station visitors to report any unusual items or activity.[79] Passengers have indicated that they would like to see improved personal security on the train and at stations as part of future improvements.[80]

5.3 British Transport Police and organisations including Network Rail and train operators are working closely together to encourage the reporting and prevention of crime – this must continue to ensure that passengers from all parts of society feel safe to use the railway. Nationally, almost three-quarters of journeys are rated satisfactory for personal security at the station (73%) and on the train (74%).[81]

6. Passenger satisfaction

Incentives for service quality

6.1 While private providers are responsible for running trains in Great Britain, and standards vary across the network, the government intervenes to ensure that particular features of passenger service quality are maintained.

6.2 In 2013, the Brown review of the rail franchising programme recommended that quality should play a larger role in the awarding of franchises as the system did not provide an incentive to improve service quality for passengers.[82]

6.3 As a consequence:

- The procurement process was revised so that franchises could be awarded partly on quality rather than solely on price: changes were made to the structure of franchise evaluation to incentivise bidders to invest in affordable quality measures for passengers.
- The role of public consultations in the design of franchise specifications was enhanced.
- New requirements were introduced into franchise agreements on customer and stakeholder engagement, including making funds available to finance non-commercial improvements identified by customers and communities.

6.4 In 2008, National Rail Passenger Survey (NRPS) targets were introduced into franchise agreements to provide an additional incentive for operators to focus on customer experience, and to enhance the role of passenger opinion within the franchise. Operators are now measured bi-annually on customer satisfaction with station, train and customer service attributes, and their handling of delays. Where targets are not met, they must invest in tangible improvements for passengers.

6.5 There is also a reputational element to delivering a quality service on the rail industry. Consumer groups such as Transport Focus and Which?, amongst many others, play a role in terms of advocacy of service quality for passengers of Great Britain's railway.

What do passengers think?

6.6 In Autumn 2018, 79% of journeys were rated as satisfactory overall.[83] This is a statistically significant decline of two percentage points since Autumn 2017. The Autumn 2018 results also represent the lowest overall satisfaction scores for 10 years, despite the significant investment in the railway network over that period. The railway is not delivering 'the basics' or the 'core product'[84] consistently for all passengers; this includes a reliable, frequent, affordable, and punctual service. The latest NRPS findings suggest that incentives and initiatives that government and the industry have built up are not consistently putting the passenger first.

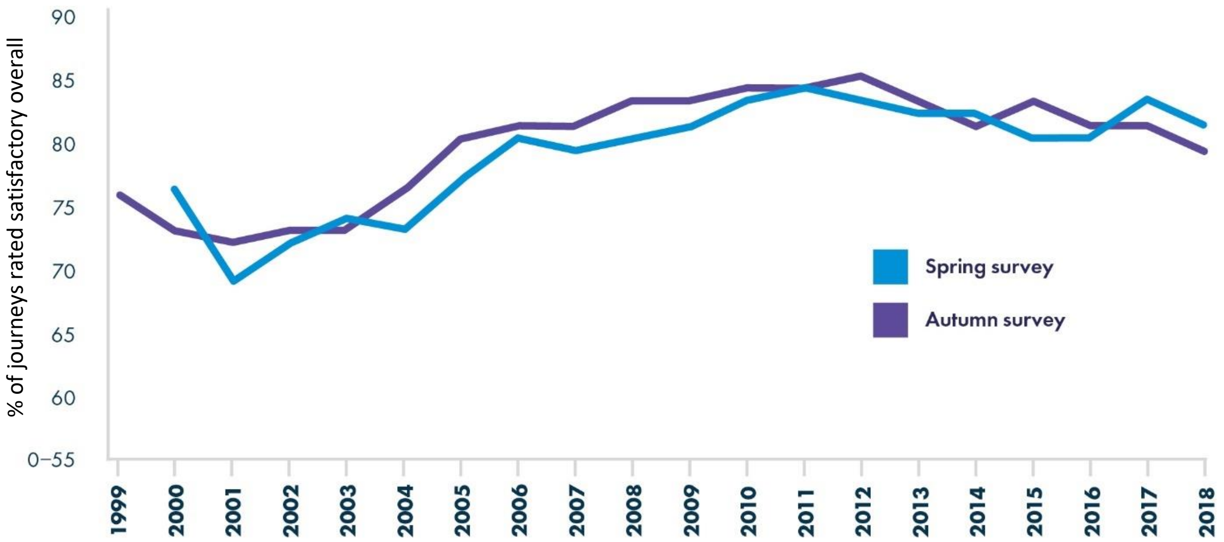

Figure 11. National Rail Passenger Survey overall satisfaction trends[85]

6.7 The latest survey is the first since the failed introduction of the new timetable in May 2018 and likely, in part, to reflect the resulting passenger sentiment. The May 2018 timetable change was the largest timetable revision ever and gave rise to sustained and significant disruption in some parts of the country – for some, persisting for several weeks.[86] The poor experience of passengers was set out in the Glaister report into the May 2018 timetable disruption.[87]

6.8 Several train operators were also affected by industrial action throughout 2018, including South Western Railway and Northern. Parts of the country (particularly Scotland) were affected by Storm Ali during September and October 2018 which closed a significant number of stations in Scotland.

6.9 Despite this, it is important to note that levels of dissatisfaction are lower for rail users when compared to users of most other modes, with only 17% of users dissatisfied with rail overall.[88]

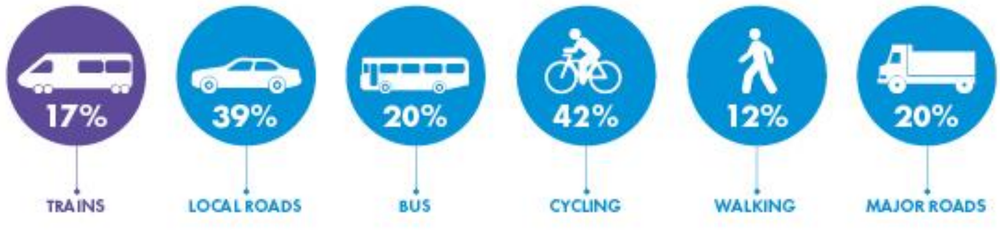

Figure 12. Overall dissatisfaction by Mode[89]

6.10 Commuters are the least satisfied users of the railway. Around 7 in 10 (71%) of those who use the railway to get to work or education are satisfied, compared to 8 in 10 business users and almost 9 in 10 (88%) of those who are travelling for leisure.[90]

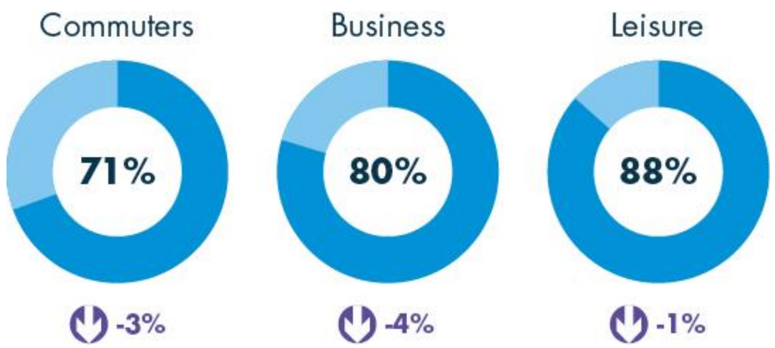

Figure 13. National Rail Passenger Survey satisfaction scores. Autumn 2018 versus Autumn 2017 by Journey Purpose[91]

Regional differences

6.11 The proportion of journeys rated satisfactory overall declined across all sectors (London & South East, Regional, and Long Distance) between Autumn 2017 and Autumn 2018.[92]

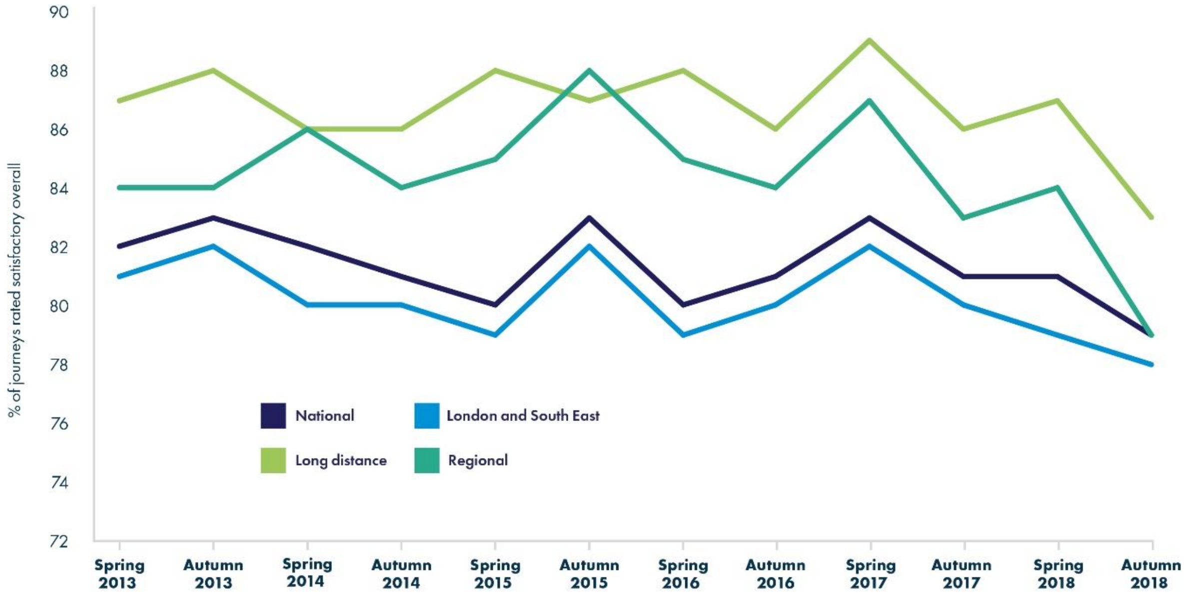

Figure 14. National Rail Passenger Survey satisfaction scores National and Regional[93]

6.12 For London and the South East, 78% of passenger journeys were rated very or fairly satisfactory overall. This is slightly lower compared to Autumn 2017 when it was 79%.[94] The biggest improvements were with the availability of power sockets on the train, and the reliability of on-train internet connectivity (both up 4 percentage points).[95] The biggest drivers of the decline in satisfaction versus Autumn 2017 were the helpfulness and attitude and availability of staff on the train (down 5 percentage points and 4 percentage points respectively)

6.13 For Regional travel, 79% of passenger journeys were rated very or fairly satisfactory with the journey overall. This was a decline versus the Autumn 2017 survey results when it was 84%. The most significant declines in satisfaction for regional passenger journeys were in relation to the usefulness of information about the delay, which fell by 13 percentage points to 39%, and how the train company dealt with delays which declined 11 percentage points to 36%.

6.14 For Long Distance travel, 83% of passenger journeys were rated very or fairly satisfactory.[96] This was lower compared to Autumn 2017 when it was 86%. Satisfaction ratings both on the train and station improved for two service areas; reliability of the internet connection and the availability of power sockets,[97] which could be attributed to new and refurbished rolling stock, which is discussed in part later in Chapter 11. The biggest significant decline in satisfaction on Long Distance was with punctuality/reliability[98] and how well the train company deals with delays (both down 7 percentage points).[99]

National downward trends in experience

6.15 Poor punctuality and reliability ratings have contributed to the overall decline in satisfaction. At a national level, 71% of passenger journeys were rated satisfactory for punctuality and reliability.[100] This was 3 percentage points lower compared to Autumn 2017 at 74%. The biggest drop was amongst commuters, with 60% satisfied with punctuality and reliability (down 5 percentage points since Autumn 2017). The subject of railway performance is covered in Chapter 9.

6.16 Satisfaction with the helpfulness and attitude of staff on the station has declined by 1 percentage point to 77%, and declined by 4 percentage points to 64% on-board trains.[101]

National upward trends in experience

6.17 While overall scores have seen a negative trend, passengers have pointed to some areas in which the railway is improving.[102] Autumn 2018 results showed increases in passenger satisfaction rating amongst the lowest scoring metrics. Since Autumn 2017 in the proportion of passenger journeys rated satisfactory for:

- The availability of Wi-Fi at the station which increased 2 percentage points to 36%.
- Reliability of internet connection on the train which was up 3 percentage points to 33%.
- The availability of power sockets on the train, up 4 percentage points to 32%.[103]

Crowding levels

6.18 Nationally, 69% of passenger journeys were rated satisfactory for the level of crowding on the train. This was not a significant change from Autumn 2017.[104]

What has the biggest impact on overall satisfaction and dissatisfaction?[105]

Looking closer at the biggest drivers of satisfaction and dissatisfaction overall from the Autumn 2018 NRPS results, it could be argued that, even during times of poor punctuality and reliability, satisfaction levels could be maintained if the delays are dealt with effectively and with the passenger at the centre.

We discuss later in the paper how disruption is currently experienced by passengers in Chapter 9.

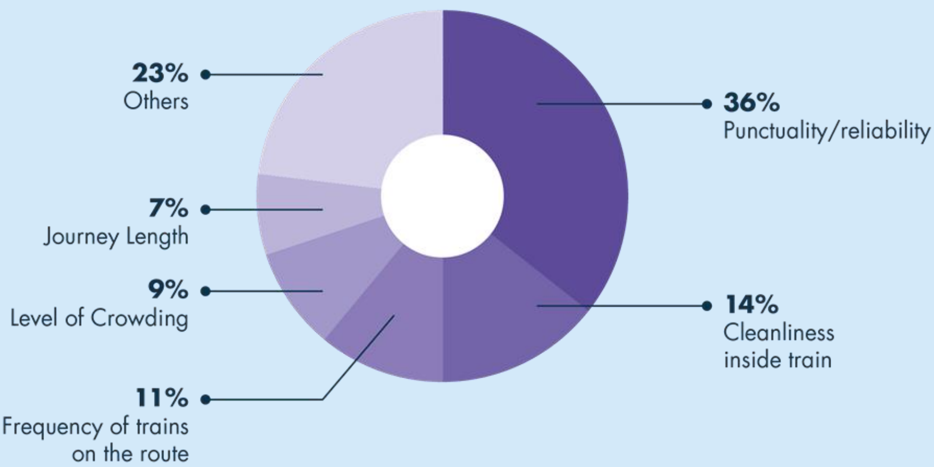

Figure 15. What has the biggest impact on overall satisfaction? [106]

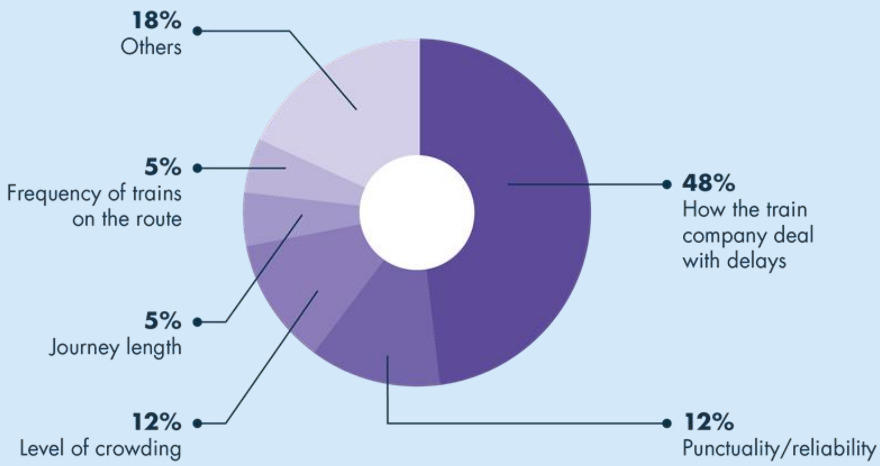

Figure 16. What has the biggest impact on overall dissatisfaction? [107]

6.19 In terms of satisfaction with individual train operating companies (TOCs), overall satisfaction decreased significantly by 8 percentage points on TransPennine Express and Greater Anglia, and 9 percentage points on Northern and Great Northern.[108]

Train operator	Autumn 2018	
Heathrow Express	96%	5%
Grand Central	94%	-2%
Chiltern Railways	92%	4%
Hull Trains	91%	-3%
Merseyrail	90%	2%
Virgin Trains	90%	-1%
Gatwick Express	88%	7%
c2c	88%	-2%
London North Eastern Railway	87%	-5%
TfL Rail	86%	-*
London Overground	85%	-2%
West Midlands Trains	84%	0%
East Midlands Trains	84%	-1%
Arriva Trains Wales	82%	2%
CrossCountry	81%	-2%
Scotrail	79%	-6%
Great Western Railway	78%	-2%
Southeastern	78%	-2%
Thameslink	77%	-6%
Southern	74%	2%
South Western Railway	73%	-3%
TransPennine Express	73%	-8%
Greater Anglia	73%	-8%
Northern	72%	-9%
Great Northern	68%	-9%

Figure 17. Satisfaction by Train Operating Company[109] [110]

6.20 Figure 17 shows that Open Access TOCs score higher in overall satisfaction versus almost all other Franchised and Concession TOCs. This is driven in part by the passenger types which travel on Open Access TOCs. Open Access TOCs have higher proportions of business journeys and very low proportions of commuter journeys compared to Franchised and Concession TOCs. NRPS satisfaction scores are generally lower for commuter journeys than business and leisure journeys.

Staff engagement and passenger satisfaction

6.21 Rail employees play a vital and positive role in customer experience and satisfaction; passengers value staff and speak of the positive contribution staff can make to their journeys. Passenger satisfaction with railway staff is relatively high, with 77% of journeys rated positively for the attitude and helpfulness of staff at stations and 64% of journeys rated satisfactory for the attitude and helpfulness of staff on trains in Autumn 2018.[111] Customer facing rail employees cite the interactions they have with passengers – helping them with their journeys and getting to know them – as one of the most positive aspects of their job.

6.22 However, staff also can experience some challenges which may impact on their ability to provide excellent customer service.[112] Difficulties during delays and disruptions can be a source of frustration for employees; according to Department for Transport research, staff sometimes find that they do not have access to the latest information and, consequently, they may not be able to provide customers with the most relevant and helpful advice. [113] If the rail industry is to develop a truly customer-centric culture, with the needs of passengers at its heart, it will be vital to ensure that staff are provided with the tools and training that they require to deliver excellent customer service.

Improving our understanding of satisfaction

The National Rail Passenger Survey (NRPS) has collected almost 40 aspects of passenger opinions of their journey experience since 1999.

As discussed earlier in this chapter, operators are now measured bi-annually on passenger satisfaction. There are also a range of other sources that provide wider insight on the behaviours, priorities and views of rail customers such as the National Travel Survey and the research studies commissioned directly within the industry. However, there are gaps in the evidence available to industry. Some sources of information are gathered on an ad-hoc basis, others provide only high-level insight, and the majority focus primarily on the operational aspects of rail services, and do not cover the emotional dimensions of the customer experience, for example stress.

The Department for Transport and the rail industry as a whole recognises that more frequent, granular and relevant customer insight needs to be gathered if it is to help industry adopt a more proactive approach to improving the end-to-end journey experience, and identify and address problems much more quickly. In 2016, the Transport Select Committee concluded in its review of improving the passenger experience, that the headline measures of passenger satisfaction and train operating company performance “do not accurately reflect the real experience of many passengers, particularly commuters on overcrowded parts of the network”.[114] The industry is working on ways to address this issue.

A new programme of work – Wavelength – is currently being developed by the rail industry. It aims to collect a wider range of information about the customer journey on a more regular basis, drawing on existing sources as well as new ones. Wavelength aims to cover all passenger services across Great Britain’s railways, tracking performance against a series of key commitments based on core passenger priorities; these are called ‘Customer Promises’ and they cover how customers *feel*, as well as how satisfied they are:

7. Freight customer experience

The rail freight sector

7.1 Freight customers (businesses that have commercial agreements with Freight Operating Companies (FOCs) who move goods on their behalf) include shipping lines, the energy sector, manufacturing industries, retailers and construction firms.

7.2 Network Rail is also a major customer of rail freight, and relies on operators to transport materials for engineering works. Freight customers, such as ports, have invested in both their own infrastructure and Network Rail's infrastructure in order to facilitate growth.

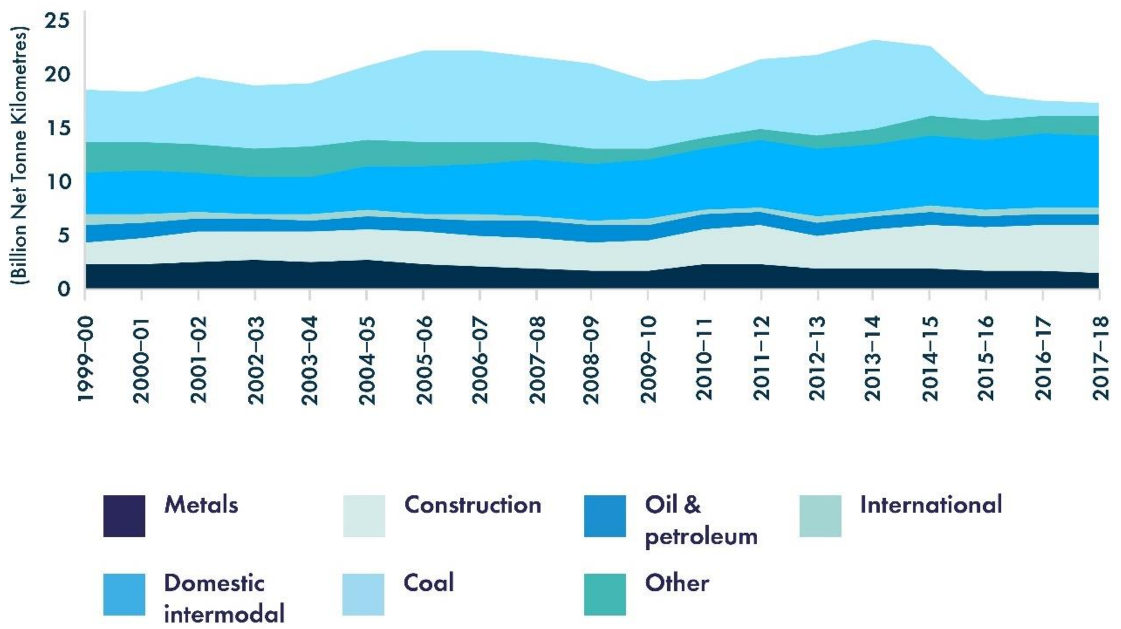

Figure 18. Freight moved on the rail network[115]

7.3 The movement of bulk materials such as coal and steel has historically been rail freight's core market. Coal flows saw a significant decline in 2015 following the government decision to phase out coal-based energy production, with coal freight volumes now down by 79% compared to 1982-83.[116] The industry has had to make significant changes to its business model to grow other markets, including intermodal, construction and automotive. It has had considerable success, and total freight volumes excluding coal have increased by 47% since the early 1980s.[117]

Operational requirements

7.4 There are five major FOCs who transport goods on the network on behalf of freight customers. Three of these operators are owned by overseas investors, one is owned by the German state railway and another is a wholly owned subsidiary of the Nuclear Decommissioning Authority (NDA). In 2017-18, 17 billion tonne kilometres of freight was transported on the network, and approximately 600 freight trains operate each day (of approximately 22,500 trains in total).[118]

7.5 The rail freight sector operates within a very different context to the passenger sector. Whilst the vast majority of passenger services are specified through the franchising process, rail freight flows operate on an entirely commercial basis and are highly responsive to market demand. Services may therefore start up or cease at any time, and so rail freight requires much greater flexibility than the passenger sector when it comes to timetabling and access to the network. A construction flow, for instance, may have a train path in the timetable for every day of the week, but only utilise these paths on the days that material is required.

7.6 Owing to the sector's focus on new markets, freight's geographical footprint on the network has changed. Whereas coal flows were more likely to operate on sections of the network that are less congested, intermodal and construction flows are much more focussed on delivering goods into major cities and urban areas. Consequently, rail freight is now increasingly operated on intensively used infrastructure, competing with passenger services for scarce capacity.

Priorities for the rail freight sector

7.7 Unlike passengers, there is no established survey of freight customer satisfaction. However, in our analysis of freight customers' responses to our call for evidence and our wide-ranging engagement with the industry, we have identified a number of issues of common concern.

7.8 Above all, customers want to see the railway better respond to changing market demand to allow the rail freight sector to facilitate growth. Although there are existing customers who are looking to grow their use of rail freight, operators can often struggle to secure a path on their behalf.

7.9 Although this can be due to capacity and capability constraints, some customers have identified a lack of focus on the needs of the end customer within Network Rail. Given that many rail freight flows operate over long distance and frequently cross more than one Network Rail Route boundary, customers want to see Network Rail taking a network-wide approach to rail freight capacity and capability issues, particularly as route devolution evolves further with recently announced proposals to make routes more responsive to local needs.

7.10 Both customers and operators also want to see firm protections and incentives to safeguard against closer alignment between train operators and Network Rail. The rail freight industry is concerned that closer working and joint incentives could result in the side-lining of freight's interests and lead to decisions being made that negatively impact on freight's performance and potential for growth.

7.11 Although freight performs well on the network, with 94% of freight trains assessed as arriving within 15 minutes of their scheduled time in 2017-18, freight customers have expressed a desire to see the average speed of freight services on the network increase from a current Network Rail estimate of around 25mph. An increase in average speed would provide a better end-customer experience and improve rail freight's competitiveness versus road.[119]

7.12 In terms of wider policy and strategy, customers would like to see greater consideration of rail freight capacity and capability requirements when major network enhancements are planned, and for these decisions to be made with cognisance of how freight and logistics operates as a whole system across both rail and road. Customers would also like to see government consider how planning policies can be used to protect rail freight sites from land development which has the potential to constrain operations ensuring that customers can continue to deliver into inner cities.[120]

8. Value for money

8.1 Farepayers' perception of value for money is low.[121] While the average passenger income per journey decreased between 2016-17 and 2017-18 by 0.7% to £5.65,[122] overall income from fares was up 11.6% from five years ago. Rail fares have increased since privatisation, making rail travel more expensive, with the average fare per journey increasing over 20% in real terms since 1995.[123] While there has been increases in cost of travel by rail, transport costs overall have more than doubled in 20 years. The cost of road passenger travel has risen faster than rail travel since 1996.[124]

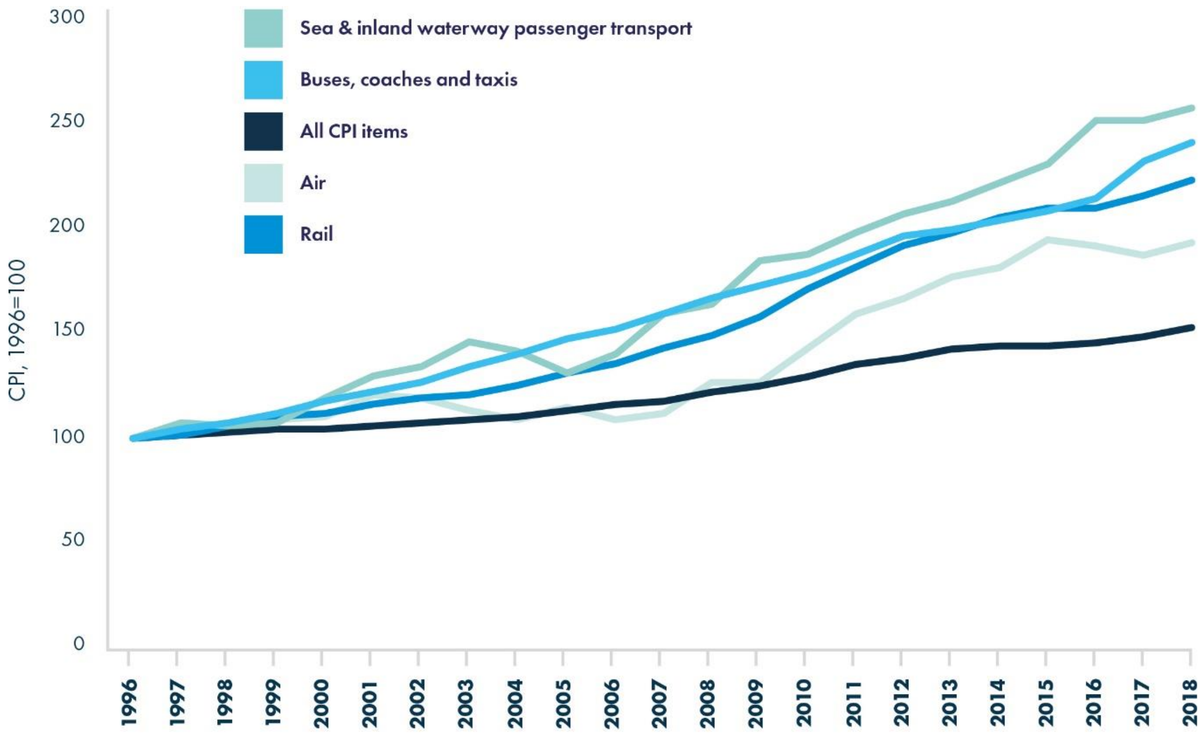

Figure 19. Cost of travel by mode (measured by the Consumer Prices Index 1996=100) [125]

8.2 Transport Focus research shows that tickets offering better value for money is the top priority for improvement among all rail passengers.[126] Nationally, in Autumn 2018, 46% of journeys were rated as satisfactory for value for money for the price of their ticket.[127] This was not significantly different to Autumn 2017.

8.3 Perceptions vary based on purpose of journey, with just 31% of commuters rating their journey as satisfactory value for money. Cost is only a single element of perceptions of value for money. Research has suggested that cost is not the highest priority consideration for some passengers commuting by rail.[128] One of the reasons for this is that most commuters have limited alternative modes by which to commute.[129] Train travel is seen by some commuters as providing value for money (in comparison to other modes of travel such as car or bus) and so, for some, cost is a primary concern only in the context of poor service.[130]

8.4 Almost half (47%) of business journeys in Autumn 2018 were rated satisfactory for value for money, while almost two-thirds (64%) of leisure journeys were rated as satisfactory in this regard. They have few concerns as most can avoid expensive peak or busy trains (by planning in advance).[131] However, leisure passengers are frustrated by differences in ticket pricing. If they must travel without pre-booking tickets this can lead to frustration about the cost of some services.[132]

8.5 Transport Focus research supports the view that value for money is not wholly down to price.[133] The cost of the ticket is clearly a major concern, but judgements about value are also influenced heavily by train punctuality and the ability to get a seat.

8.6 Issues with how tickets are sold mean that the confidence passengers have in their ability to buy the cheapest or best ticket for the journey they are making can be mixed. According to Transport Focus research, the uncertainty caused by ticket validity could see passengers spending more on a ticket than they need or purchasing a ticket that is not valid for their journey.[134]

Fares – the passenger perspective

8.7 Fares regulation has not substantially changed since privatisation in the 1990s. Government regulation of fares is intended to ensure that consumers are protected, particularly in captive markets, and support rail's wider economic and social benefits.

8.8 Government imposes a cap on regulated fares in relation to inflation. According to the Rail Delivery Group's (RDG) Fares Reform report in 2019, the fares and ticketing system is an area which is "long-overdue for reform".[135] This is not straightforward, as the current regulatory framework, industry systems and operator franchise commitments make reform highly complex. Research has shown that some passengers approach buying rail tickets very differently to other purchasing decisions.[136] This is the result of the structure of the rail pricing system and some passenger attitudes towards train travel.[137]

8.9 The lack of competition between operators on some routes, low engagement with the system and a misunderstanding of how and why fares are discounted, marks buying train tickets out from other consumer interactions (compared, for example, to booking flights).[138] These differences mean that some passengers often start from a position of little understanding of the pricing system and comparatively little motivation to understand it.[139] To some passengers, pricing systems that are hard to navigate, appear to mislead or exploit customers and are seen to have seemingly arbitrary prices for different people, goods or services are indicators of a system that is not functioning as well as it could for consumers.[140] Rail is largely seen to be performing poorly against these principles for a good pricing system.

8.10 This lack of understanding is not limited to users, with both users and non-users having mixed knowledge on the number of ticket types available. Department for Transport research found that a quarter of passengers fully understood the range of tickets available while around a half (46%) partly understood.[141] Six in ten non-users did not understand the range of different ticket types available when travelling by train.

Priorities for a new system

8.11 Research conducted for the Department for Transport in 2018-19 found three things passengers commonly want from a fares system: fairness, transparency and simplicity.[142] There is also strong support for systems that have a clear intuitive or logical link between the product/service and the price that is paid.

8.12 Any new system should be flexible to respond to wider socio-economic changes. For example, some of the respondents to our call for evidence have called for season tickets that aligns with changing working patterns, such as Transport Focus which describe the customer viewpoint,[143]

> *"The ability to buy the right product that matches the way I want to travel. Not paying for something I am not going to use (for example a weekly season when I only want to travel three days; an Anytime return when I am returning in the off-peak)."*

8.13 Similarly, Department for Transport research also highlights that commuting behaviour in England is undergoing a period of change with workers commuting to work fewer days per week, and also growing numbers of workers who work flexibly as they do not have a fixed work site.[144]

9. Railway performance

9.1 Punctual and reliable services are critical to the passenger experience. This chapter explores how performance is measured on the network and how it is experienced by passengers.

Measuring performance

9.2 Until now, the main measure for performance on the railway has been the Public Performance Measure (PPM). PPM combines figures for punctuality and reliability into a single industry standard measure of the performance of passenger services against the planned timetable.[145] A train is considered to be “on time” if it arrives within five minutes of its schedule; this extends to 10 minutes for a Long Distance service. Critically, PPM is calculated only at the last station on the service. Trains can be significantly late at intermediate stations but still recover to be ‘on time’ at the destination. Passenger satisfaction is driven by many factors across all segments but the single biggest driver of satisfaction across all passenger journeys is punctuality and reliability.[146]

9.3 There is some disparity between PPM and satisfaction levels.[147] While national PPM in Q2 2018-19 was 85.6%, down from 89.5% the previous year,[148] 71% of passengers were satisfied the punctuality and reliability of their last journey in the NRPS Autumn 2018 survey.[149]

9.4 Perhaps reflecting the less time-pressured nature of leisure journeys, these passengers were most satisfied with punctuality and reliability (83%), compared to around three-quarters (74%) of business travellers and just six in ten commuters.

Figure 20. Public performance measure compared with satisfaction (NRPS Spring and Autumn 2018) [150] [151]

PPM and passenger perception

9.5 A reason for the disparity between perception and performance data is that passengers can be dissatisfied even when trains are officially 'on time'.

9.6 Transport Focus explored the relationship between satisfaction with punctuality and actual performance across a range of train operators.[152] The research established that passengers notice delays well before the official threshold of delay determined by the current PPM measure (i.e. up to five minutes for shorter-distance services and 10 minutes for longer-distance). Key findings include:

- On average, passenger satisfaction with punctuality reduces by between 2 and 3 percentage points with every minute of delay.
- Commuters (except those travelling long distances) notice lateness after one minute of delay, with satisfaction falling by an average of five percentage points per minute during the initial period of delay.
- Business and leisure users and Long Distance commuters tend to change their level of satisfaction with punctuality after a delay of four to six minutes.

9.7 Commuters are particularly time sensitive in terms of satisfaction with the service as it is affected after just one minute of delay, where after their satisfaction falls by 5 percentage points per minute of lateness between three and seven minutes.[153]

Right time running

9.8 This insight led Transport Focus to argue that there may be value in focussing on reducing small sub-threshold delays – for instance, reducing lateness on a train from four minutes to two minutes may not have an impact on PPM scores but it will on passenger satisfaction.[154]

9.9 An on-time measure at all recorded stations has been introduced by industry and will become a primary reporting metric from April 2019.[155] It is intended to provide greater transparency that better reflects the passenger experience of rail performance.

A meaningful measure for passengers

9.10 Joint research undertaken by Transport Focus with the Office of Rail and Road (ORR) shows that passengers want punctuality data that is relevant *to their journey* rather than a company-wide average.[156] Even when they admit they are unlikely to read it themselves, they see the value in this data being available as it incentivises passenger centric behaviours in the industry.

9.11 Accurate, relevant data can help challenge negative perceptions amongst passengers and drive more performance-focused behaviours for those operating rail services. It should be noted that right-time running, while more closely matching the passenger perception of delay, still focuses on *train* performance, rather than the impact on passengers, for example during times of disruption.

What happens when services are disrupted?

9.12 Passengers understand that, as with any transport service, things do not always go according to plan and that unplanned disruption can occur. Once disruption happens, passengers generally want to feel supported to make their onward journey, which includes being kept up to date with real time information on what is happening and the choices available to them. It is important to note that these needs also vary by passenger.

9.13 Passengers' experience during a delay is the main driver of overall journey dissatisfaction.[157] Passengers rated 37% of journeys as satisfactory with respect to how delays were dealt with. This dropped to just 27% for commuters, who are more time sensitive and heavier users of rail. While business (41%) and leisure users (54%) found it more acceptable but still low.

9.14 Planned disruption is an inevitable part of an operational railway. Network Rail state that planned engineering work allows "trains to run more frequently, faster, and to improve the reliability of the rail network to reduce delays in the future".[158] Network Rail's planning of track maintenance must schedule it around the reality that trains run 24 hours a day, 365 days a year, and there is little time when the network is not being utilised.[159]

Keeping passengers informed

9.15 In a response to the Review's Call for Evidence it was highlighted that 70% of delays on the rail network are from knock-on effects on the congested network itself, rather than from a separate primary cause.[160] Passengers can be very negatively impacted by unplanned disruption so the railway's aim must be to minimise the impact on passengers and put them at the heart of service recovery.

9.16 Transport Focus's research into passenger priorities found that keeping passengers informed during planned and unplanned disruption is one of the top ten priorities for improvement.[161] Communication and onward journey options are key, particularly during unplanned disruption. Passengers should have accurate and clear information about the best route to their destination, including on other modes before and after their train journey.[162] This can include punctuality of the service, the cause of any delay, how long a delay is likely to last, and alternative travel options where appropriate.[163]

9.17 The Glaister report into the May 2018 timetable disruption is clear on the negative impact of poor information for the passenger:

> *"A train being late or cancelled causes inconvenience for the passenger. This frustration is worsened when the passenger is unable to find out whether the service is on time, or running at all. Before the timetable change there were significant issues with the availability of advance booking information for passengers. Following the introduction of the May 2018 timetable poor performance was exacerbated by a lack of real-time information."*[164]

9.18 In 2014, Transport Focus also published research looking at passengers' needs and experiences during *unplanned* disruption specifically, including around the provision of information.[165] Transport Focus's submission to our call for evidence highlighted two key points:

- Deficiencies in passenger information at times of disruption persist in a way that would not be tolerated if they concerned operational or safety failures. This is an enduring cultural problem, across the rail industry.
- Operators must measure on a robust and ongoing basis the quality of information provided during disruption. This could then form the basis of a

target – to incentivise more communication and engagement around engineering work (which will potentially lead to happier – or at the least less dissatisfied – passengers).

9.19 New DfT research currently underway shows that whilst little has changed since 2014 disappointingly, technology may offer new solutions to bring about real change.

Passenger rights and compensation

9.20 When services are disrupted, whether planned or unplanned, it is important to compensate passengers. The Glaister report highlights this:

> *"Although financial reimbursement cannot always offset the inconvenience to passengers, this is an important area of industry activity. Where passengers have paid good money for poor service, compensation can provide a tangible acknowledgement of where the industry has fallen short of passenger expectations and contractual requirements".*[166]

9.21 Government policy is to ensure that, when things go wrong, passengers are fairly compensated for delays and cancellations and are able to claim quickly and easily.

9.22 The National Rail Conditions of Travel (NRCoT) set out the minimum compensation arrangements. However, most train operating companies on DfT franchises offer more than this minimum. The Delay Repay compensation scheme was introduced in 2007 and is now in place on the majority of train operators – offering a refund of 50% of the fare for delays of 30 to 59 minutes. In 2016 an enhanced compensation scheme, Delay Repay 15 (DR15) was introduced, which entitles passengers to compensation of 25% of the single fare for delays of 15-29 minutes. DR15 is now in place on seven of the 14 DfT TOCs. Delay Repay on Great Britain's rail network is more generous than the European Union Regulation on rail passengers' rights and obligations, which is 25% for delays greater than one hour and 50% for delays over two hours.[167]

9.23 In addition to Delay Repay, the introduction of the Consumer Rights Act for rail on 1 October 2016 strengthened the right of passengers to claim compensation for poor service. Train operators must process passenger compensation claims in accordance with the industry target of 20 working days, for which ORR now monitor compliance.

9.24 The Department for Transport has worked with the rail industry to make it as easy as possible for passengers to claim compensation, encouraging TOCs to increase awareness of Delay Repay, as well as automated processes which include mandating a simple one-click system for claiming compensation as announced by the Secretary of State.[168]

9.25 Passengers are much more satisfied than they used to be with the process for claiming compensation and claims are now being settled more quickly than in previous years.[169] Claimant satisfaction with the claims process has increased significantly in recent years. Satisfaction is high with the form of payment, the speed of response, the value of payment and the method of claiming.[170]

9.26 Official statistics released by the ORR show there were around 3 million compensation claims made for rail delays between April and mid-October 2018, of which 84% were approved and 92% were closed within 20 working days. [171]

10. Stations and accessibility

10.1 The number of stations has steadily risen since the early 2000s, increasing by 3% between 1999-00 and 2017-18.[172] There are now 2,563 stations in Great Britain, although 82% of journeys start or end at the top 500 busiest stations.[173]

10.2 The vast majority of stations are owned by Network Rail, and there are variations across the country in the operational management for these assets. Predominately, stations can either be managed by Network Rail or a train operating company. Network Rail manage 20 of the major stations,[174] while most are leased to train operators, but typically only for the period of the franchise.

10.3 As the first and last point of physical contact with the railway for passengers, stations can make or break a passenger's impression and experience. This view is supported by the 2017 RDG report, 'Regenerating Britain's Railway Stations: a six-point plan', which explained that first impressions count and stations are vital in shaping passenger opinion.[175] However, despite major investment over the last few years in several prominent stations (e.g. King's Cross, Birmingham New Street and Nottingham) many smaller and medium sized stations remain in "poor condition" according to RDG's report.[176]

10.4 Current overall satisfaction levels with stations in the latest NRPS Autumn 2018 results highlight the scope for improvement in stations for each passenger segment.[177]

Figure 21. NRPS – Overall satisfaction with the station, Autumn 2018[178]

10.5 In the NRPS results for Autumn 2018, passengers rated overall satisfaction with the station on their last journey at 80%. Commuter journeys are rated as the least satisfactory for stations overall, while business journeys are rated the highest.

10.6 The 2010 Equality Act requires train and station operators to establish a Disabled People's Protection Policy (DPPP) which must be approved by the ORR. A DPPP sets out the arrangements and assistance that an operator will provide to disabled people using its services and the ORR has powers to take enforcement action where an operator fails to comply with it. Keith Williams, Chair of the Rail Review, has asked the ORR to consider its enforcement powers around disability.

10.7 Train operator franchise agreements include requirements for them to fund improvements at stations, which in some cases are focussed on improving the accessibility of a station. Train operators may also nominate stations for the Access for All programme, which is funded by the Department for Transport and delivered mostly by Network Rail. Whenever the rail industry installs, replaces or renews infrastructure at stations it must meet current accessibility standards.

Improvements are needed

10.8 Despite Government plans for improvement in its 2018 Inclusive Transport Strategy, there is much work to do in order to realise the ambition of real change for disabled passengers, and achieving the goal of creating a transport system offering equal access for disabled passengers by 2030.[179]

10.9 As covered in Chapter 4, currently, disabled passengers travel fewer miles and spend less time travelling on average per year across all transport modes than non-disabled passengers.[180] Disabled passengers ultimately want a seamless travel experience and an opportunity and right to 'turn up and go'[181] in the same way as non-disabled passengers.

10.10 One of the key barriers to accessibility identified by disabled passengers is a lack of consistency in the way that services and facilities are delivered, even for example how signage is organised at a station.[182] The overall impact on disabled passengers can be significant.

10.11 Many stations were built in the Victorian era when accessibility needs were not considered, and despite improvements over time, more are needed.[183] Providing timely and high-quality assistance services to disabled passengers, including those with non-visible disabilities, is vital to ensure all people can travel with confidence.

10.12 The Disabled Persons Transport Advisory Committee's (DPTAC) submission to the Review highlighted that, while there has been good progress in improving accessibility, use of the rail network by disabled people still falls well short of that of non-disabled people. [184] There is an evidence gap in terms of published data on disabled non-users and why they do not travel by rail.

10.13 Accessibility of the railway is becoming increasingly important. Over the next 25 years, there will be an increasing number of older people in Great Britain; with the proportion aged 85 and over set to double in that period.[185] While many people maintain high levels of mobility and health into old age, disability has a higher prevalence as people age. In 2016-17, 45% of State Pension age adults reported having a disability; this compares to only 19% of working-age adults.[186] Conditions arising from ageing can take many forms, but will often result in a combination of symptoms, including some loss of vision and hearing, stiffness of joints, and reduction in the ability to walk long distances. These conditions can have a dramatic effect on a person's ability to travel.

11. Rolling stock

11.1 Great Britain's train fleet plays a key role in delivering the core product for passengers and forms an integral part of the customer experience.

What do passengers think?

11.1 The NRPS Autumn 2018 results provide an insight into on-board passenger experience. Passengers rated their overall satisfaction with the train on their last journey at 76% in the Autumn 2018 survey. This is a continuing decline from the Autumn 2015 survey, when passengers rated their overall satisfaction with the train on their last journey at 81%. In Autumn 2016 this was 80% and Autumn 2017 it was 77%.

11.2 Overall satisfaction with the train on their last journey for leisure passengers saw a decrease marginally by 1 percentage point from Autumn 2017 to 85%. Commuter's overall satisfaction with the train on their last journey was the lowest of all journey types, falling by 2 percentage points in the same period to 67%, while business passengers saw a 5 percentage points decline to 76%.

11.3 Transport Focus research identified a number of rail passenger priorities for improving on-board experience.[187] The top five were;

- Being able to get a seat on the train.
- Free Wi-Fi availability on the train.
- Inside of the train is maintained and cleaned to a high standard.
- Well-maintained, clean toilet facilities on every train.
- Accurate and timely information provided on trains.

Significant investment

11.4 £22 billion has been invested in rolling stock on Great Britain's railways since 1996.[188] Over 7,800 vehicles have been ordered since 2010 with over 4,500 to be delivered into service between now and the end of 2022.[189]

What benefits will this investment bring to passengers?

11.5 New rolling stock provides multiple benefits to passengers, including better performance compared to older generation fleets. For example, Arriva Rail North Limited will oversee the complete removal of the outdated and unpopular Pacers by the end of this year, and will invest £400 million in 281 brand new air-conditioned carriages – more than double the minimum required by government for this franchise. Merseyrail will also be introducing new state-of-the-art trains by 2020 which will be replacing the current 40-year-old fleet, the oldest in the UK, to cope with the 2.5% yearly increase in passenger demand. The trains will be owned locally, and publicly, with the £460 million project managed by Merseytravel on behalf of the Liverpool City Region Combined Authority. The new trains will be more reliable, easier to keep clean and will have the latest technology such as intelligent air conditioning, greatly improving the customer experience.

11.6 Train operators are also working closely with disabled passengers to improve the experience and ensure that new and refurbished fleets meet their needs. RDG's report into the future of accessible travel found that there is strong and consistent progress towards rolling stock compliance with accessibility requirements with government, the Rolling Stock Operating Companies (ROSCOs) and the train operators all working to meet that goal.[190]

Endnotes

[1] ORR: https://dataportal.orr.gov.uk/displayreport/report/html/a10e3c7b-7766-40ae-a87a-14c56cf85a63
[2] ORR: https://dataportal.orr.gov.uk/displayreport/report/html/a10e3c7b-7766-40ae-a87a-14c56cf85a63 , https://www.transportfocus.org.uk/research-publications/research/national-passenger-survey-introduction/
[3] Note: This Passenger rail usage statistical release (2017-18 Q4) showing a 1.4% fall, is different to the +0.4% passenger journeys figure in the Regional Rail Usage Statistics, as they use different methodology's; full explanation can be found here.
[4] Refers to tonne-kilometres. TSGB: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/761592/tsgb0401.ods
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