

What lessons from the past are still relevant to the future ?

CIT, Bern

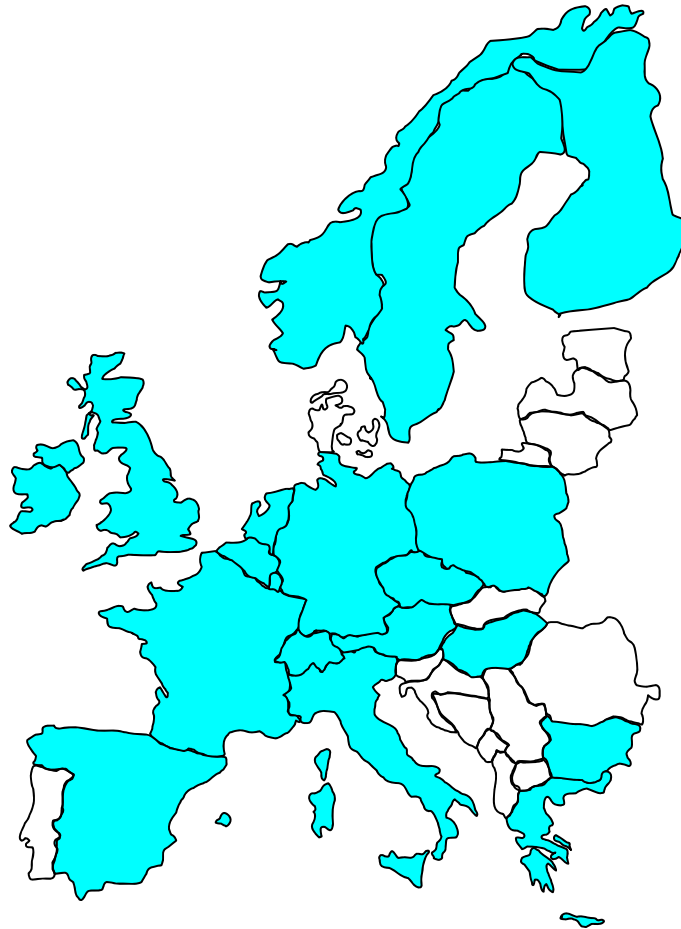
22nd November 2012

What will passengers expect?

Christopher Irwin
European Passengers' Federation

www.epf.eu

EPF
members
2012



33 member
associations in 19
states

Passengers: people whose personal needs, expectations are varied, and vary.



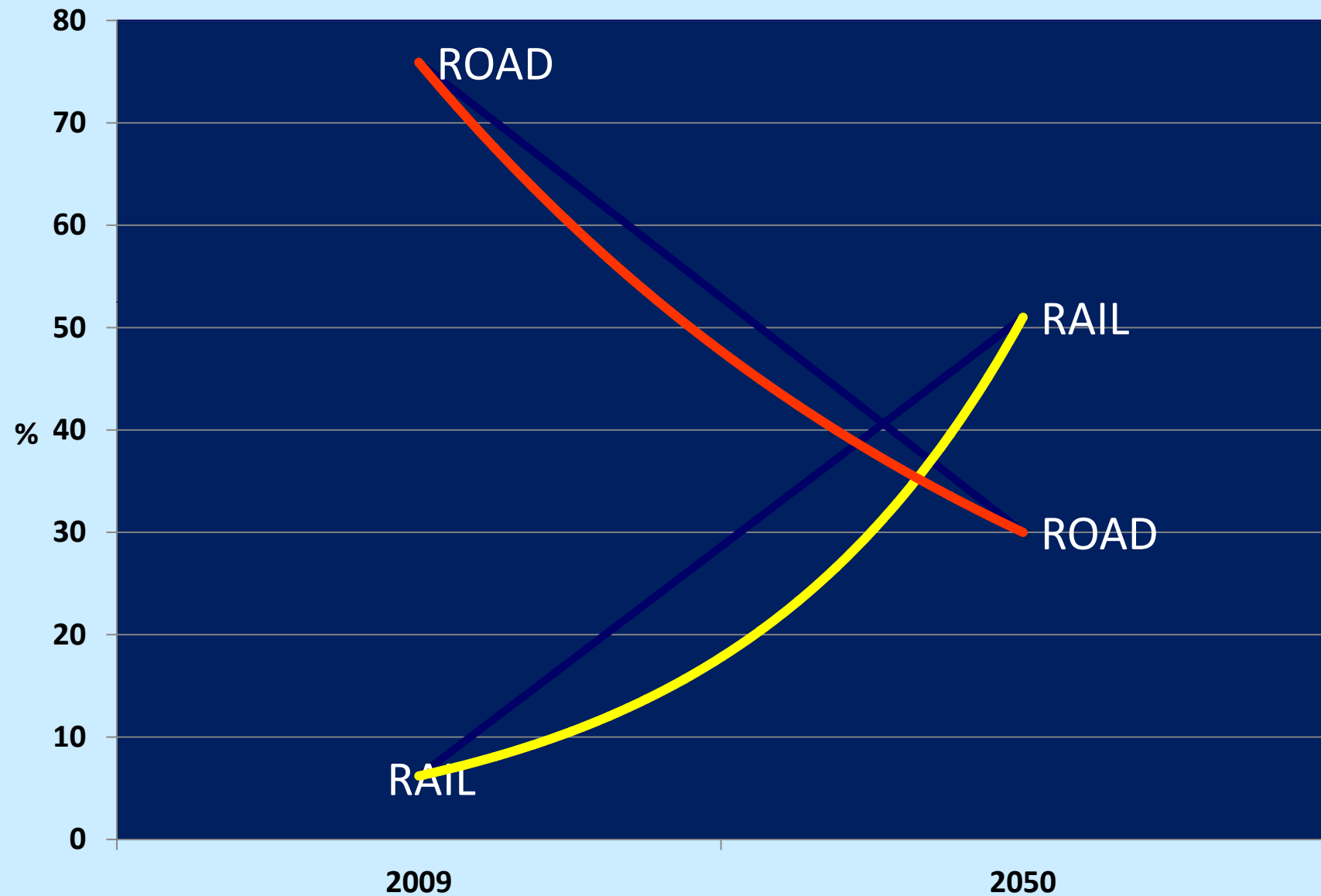
Where is passenger rail going?

1. *“By 2050 the majority of medium-distance passenger transport should go by rail.”*
2. *Europe-wide systems for multi-modal travel planning and integrated ticketing.*
3. *No more ‘conventionally-fuelled’ cars in the cities by 2050.*

– *Roadmap to a Single European Transport Area – Towards a competitive and resource efficient transport system,* CEC White Paper, March 2011

Modal shift: planned rail v road share of passenger kms

- Source: CEC, SEC (2011) 392

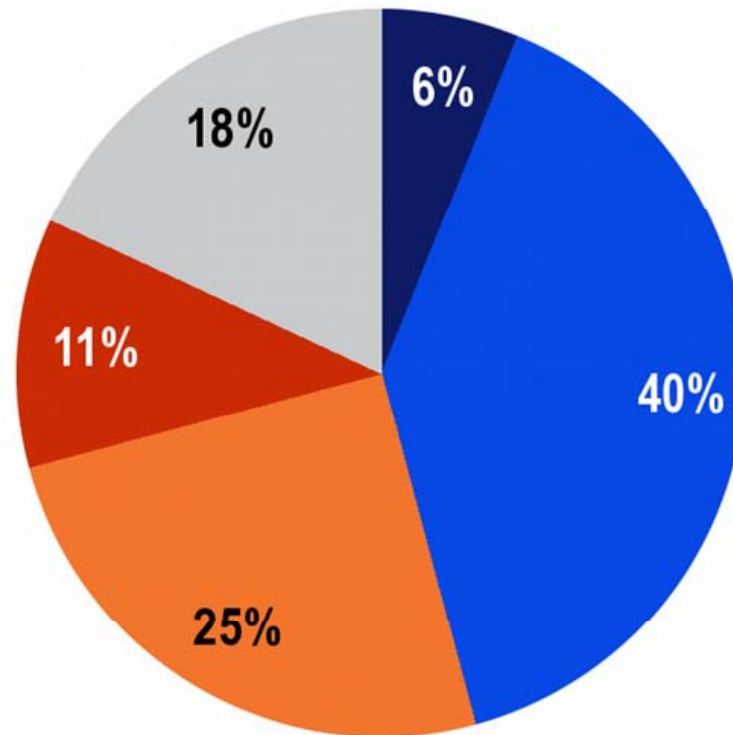


The challenge of delivery

*A distress purchase
or
The mode of choice?*

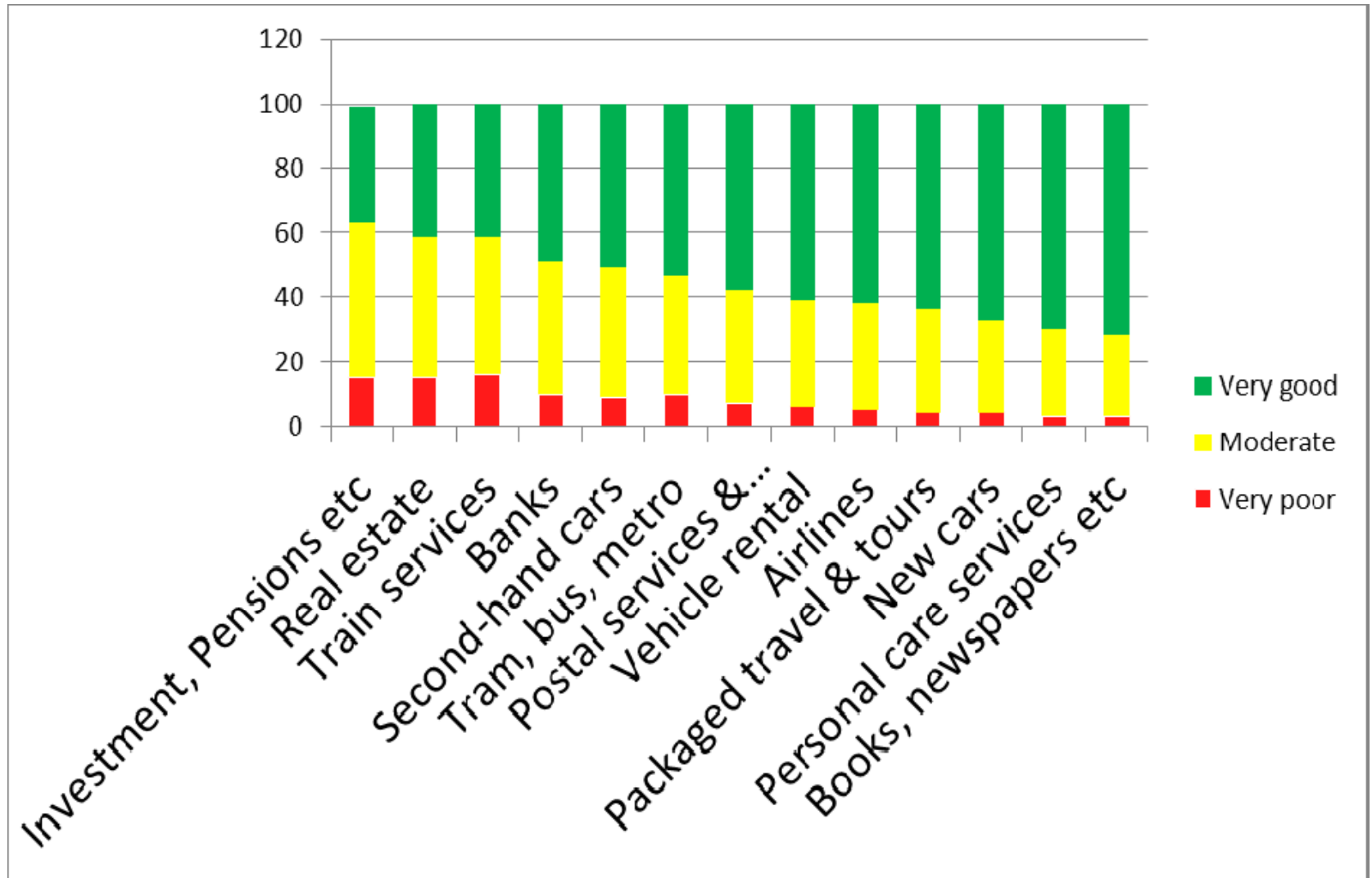
“Overall, how satisfied are you with the national and regional rail system in your country?”

Special Eurobarometer 388; 26,000 home-based face-to-face interviews in 25 EU countries, 2012



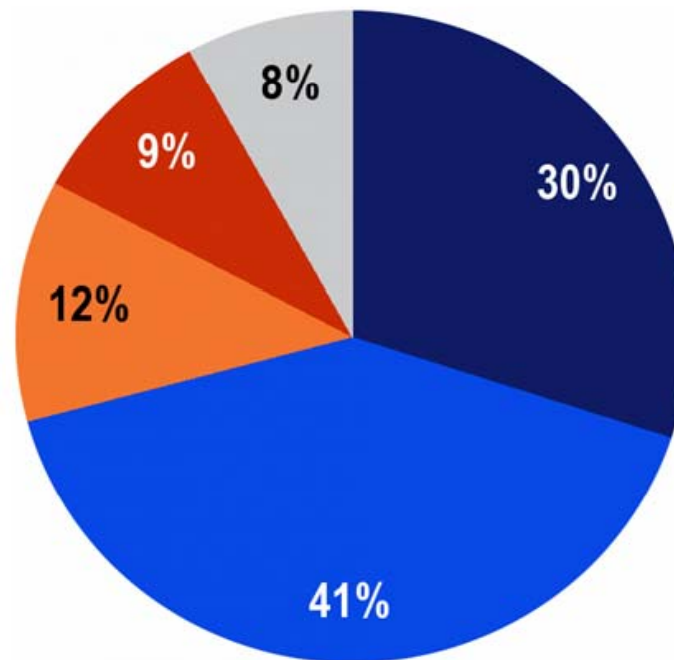
Relative consumer satisfaction with EU services

Consumer Markets' Scoreboard – *Making Markets Work For Consumers* – SEC(2010) 1257



“In general do you support or oppose opening the system in your country to more competition provided that all operators must meet the same safety standards?”

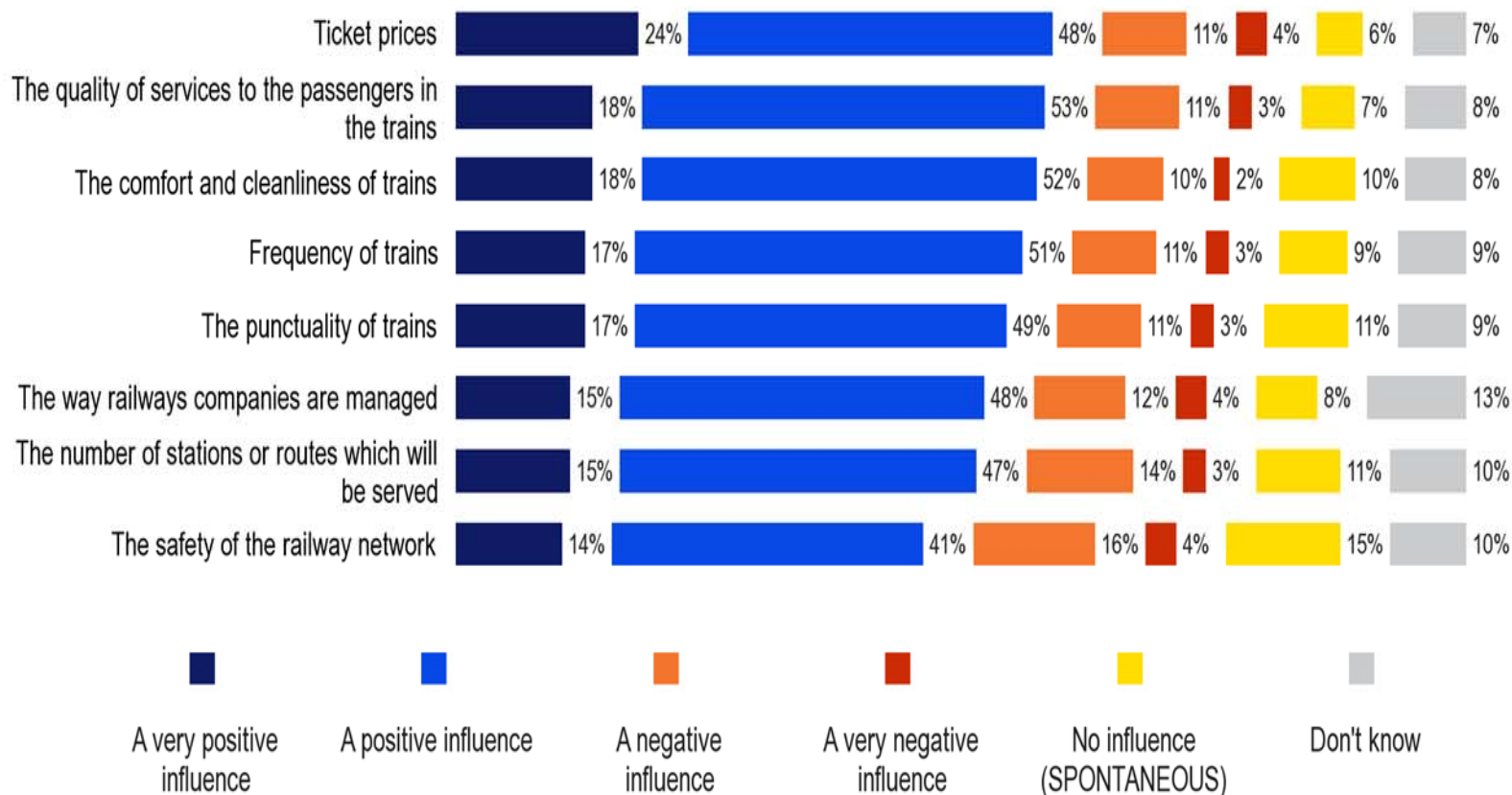
Special Eurobarometer 388, 2012



Most people foresee positive effects of more competition

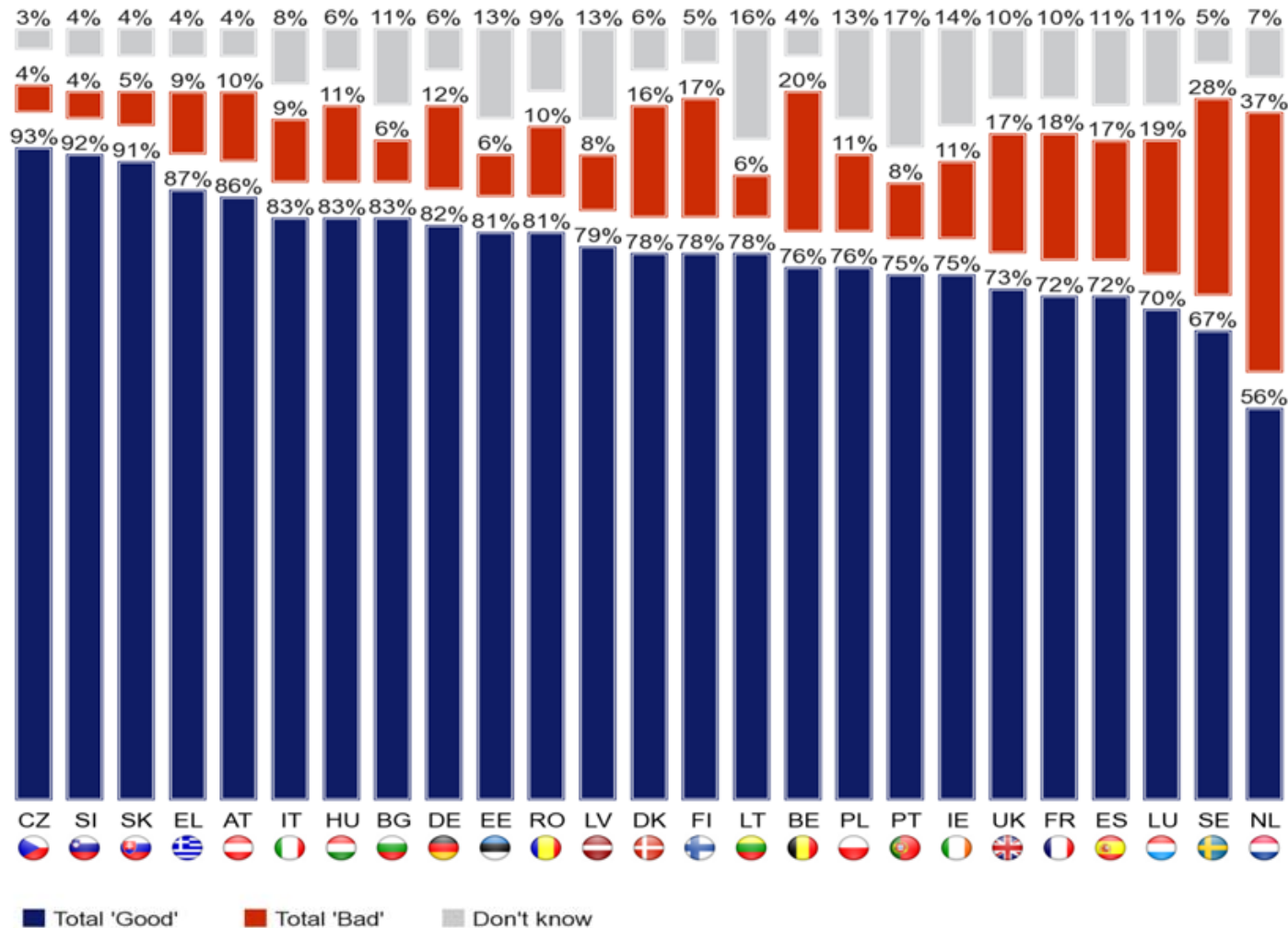
- Special Eurobarometer 388, 2012

QC6. Please tell me if you think that more competition in the rail market in (OUR COUNTRY) will have ... on ...?



EU citizens think that competition will be good for passengers

- Special Eurobarometer 388, 2012



Included UK: "Do you think that more competition in the rail market IS good or bad for...?"

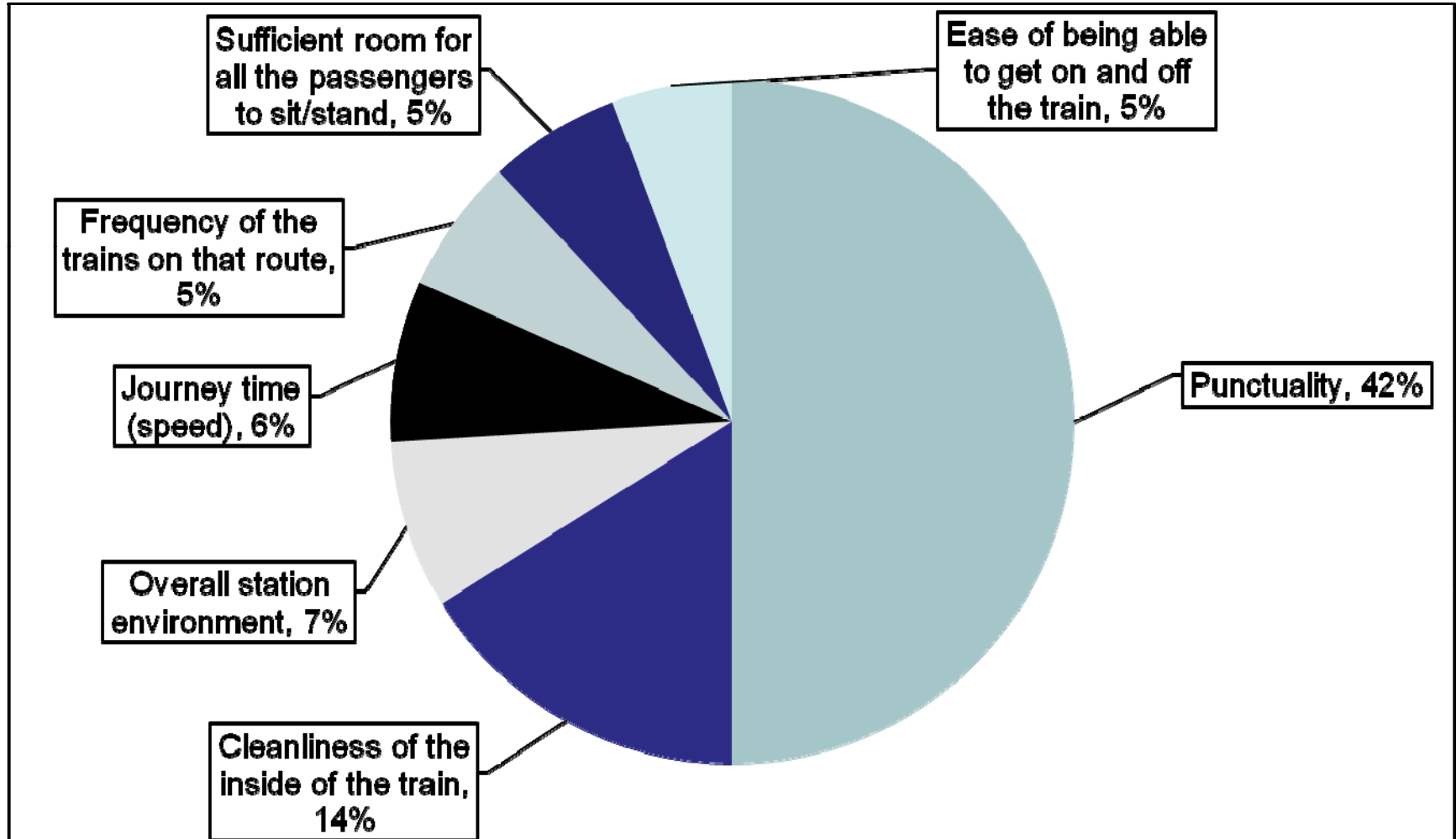
British passengers' priorities for improvement

Passenger Focus *Passengers' priorities for improvement* surveys, 2007 & 2009

2009	Score	Service Improvement Preference	2007
1	1.08	Price of train tickets offer excellent value for money	1
2	1	At least 19 out of 20 trains arrive on time	3
3	0.98	Sufficient train services at times I use the train	2
4	0.86	Passengers are always able to get a seat on the train	4
5	0.79	Company keeps passengers informed if train delays	5
6	0.75	Information on train times/platforms accurate and available	7
7	0.69	Maximum queue time no more than 2 mins	6
8	0.69	Trains consistently well maintained/ excellent condition	8
9	0.67	Seating area on the train is very comfortable	9
10	0.67	Station staff are available whenever required	17

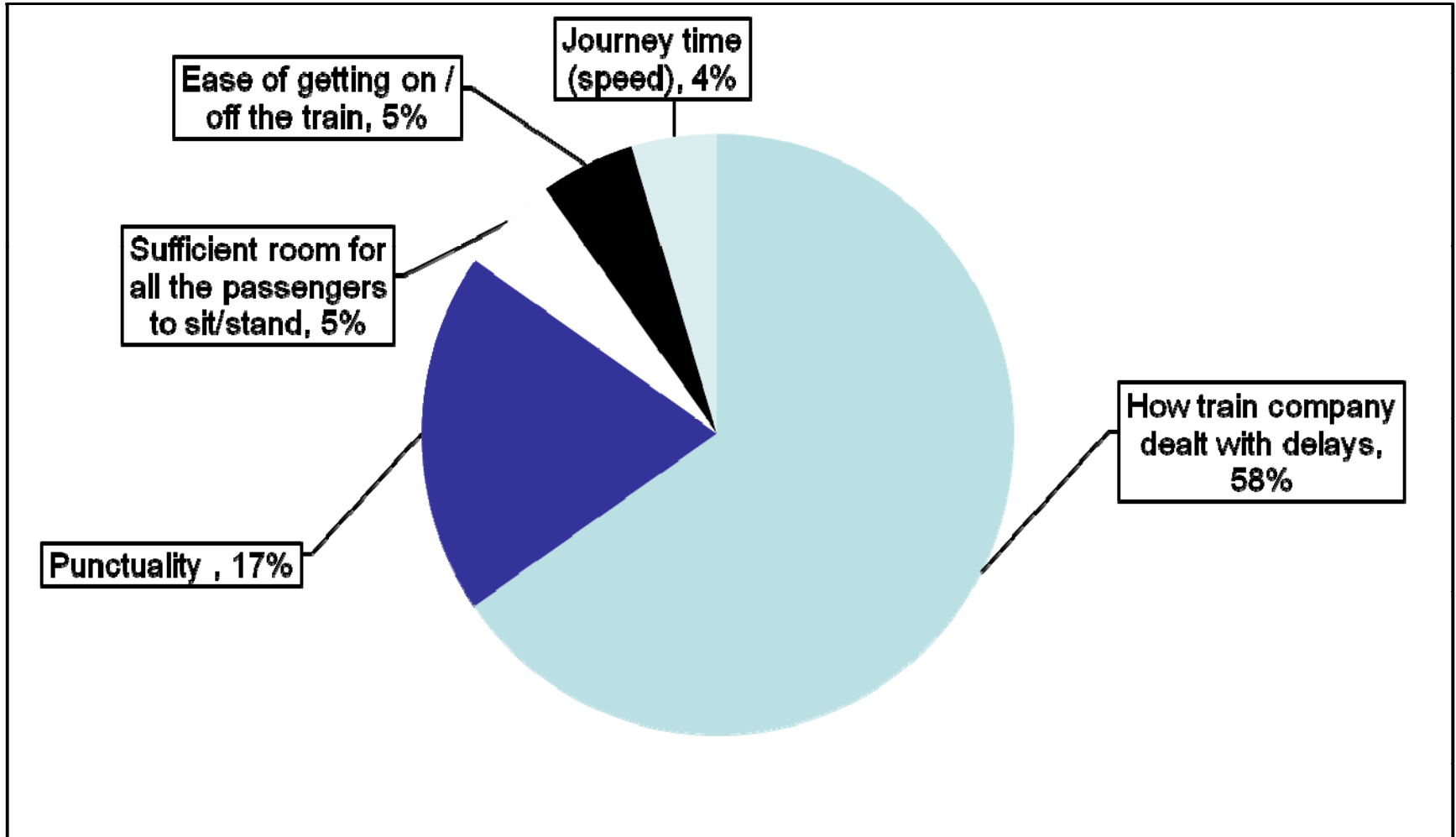
Drivers of passenger satisfaction in Britain

Source: National Passenger Survey, Passenger Focus, Spring 2012



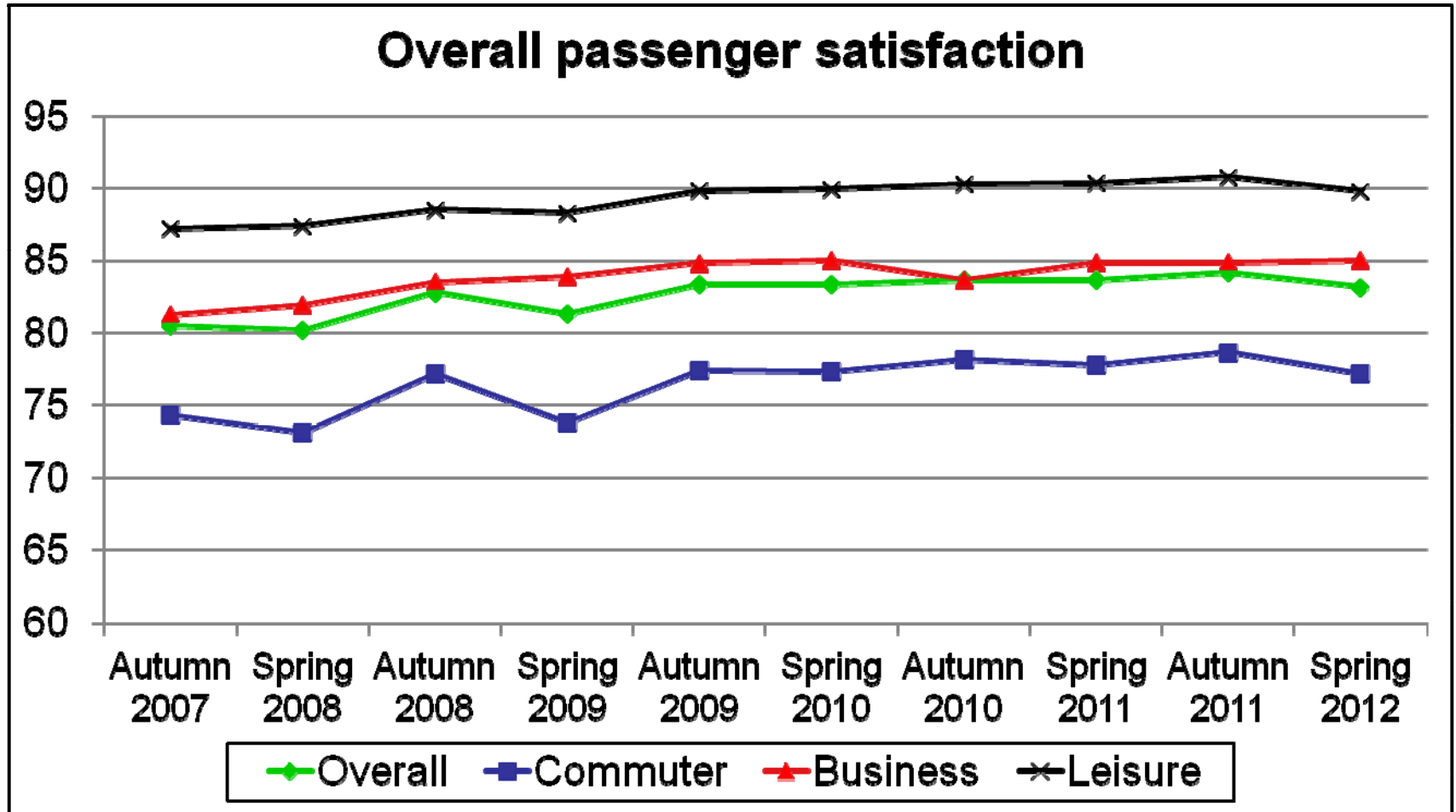
Drivers of passenger dis-satisfaction in Britain

Source: National Passenger Survey, Passenger Focus, Spring 2012



Passenger satisfaction index

Source: National Passenger Survey, Passenger Focus



Cultural change: focus on users' needs

- Market opening: *competition as a driver*
- Monitoring outcomes: *Satisfaction measures*
- Holistic thinking: *'Soft' system attributes*
- 'End-to-end journey' thinking - *an integrated co-modal experience*

Meeting users' aspirations

- **Dependable service: *Enabling investment in capacity***
- **Network enhancement through integration: *Seamless interfaces between modes***

Enabling co-modality

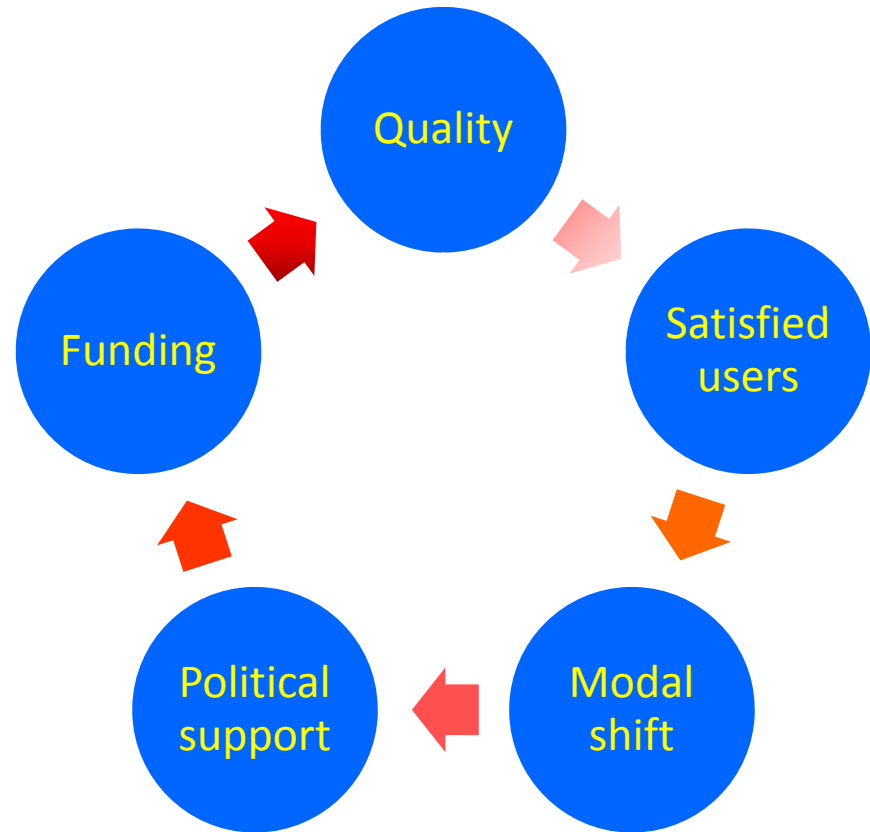
- Empowering users: *information provision and beneficial market opening (TAP-TSI)*
- Facilitating use of collective transport: *inter-availability, co-modality and through ticketing*
- Addressing congestion: *public transport and spatial planning (and the e-car heresy)*

Meeting the cost challenge

- **Competitive tendering: *Market opening and market failure***
- **Delivering interoperability: *Letting the ERA do its job***
- **Reducing the cost base: *Tackling national duplication***
- **Getting the priorities right: *Cost Benefit Appraisal as the lodestar for interventions***

Identifying the priorities

1. Service Quality:
2. Capacity:
3. Financing:
4. The Virtuous Circle:



Thank you!

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