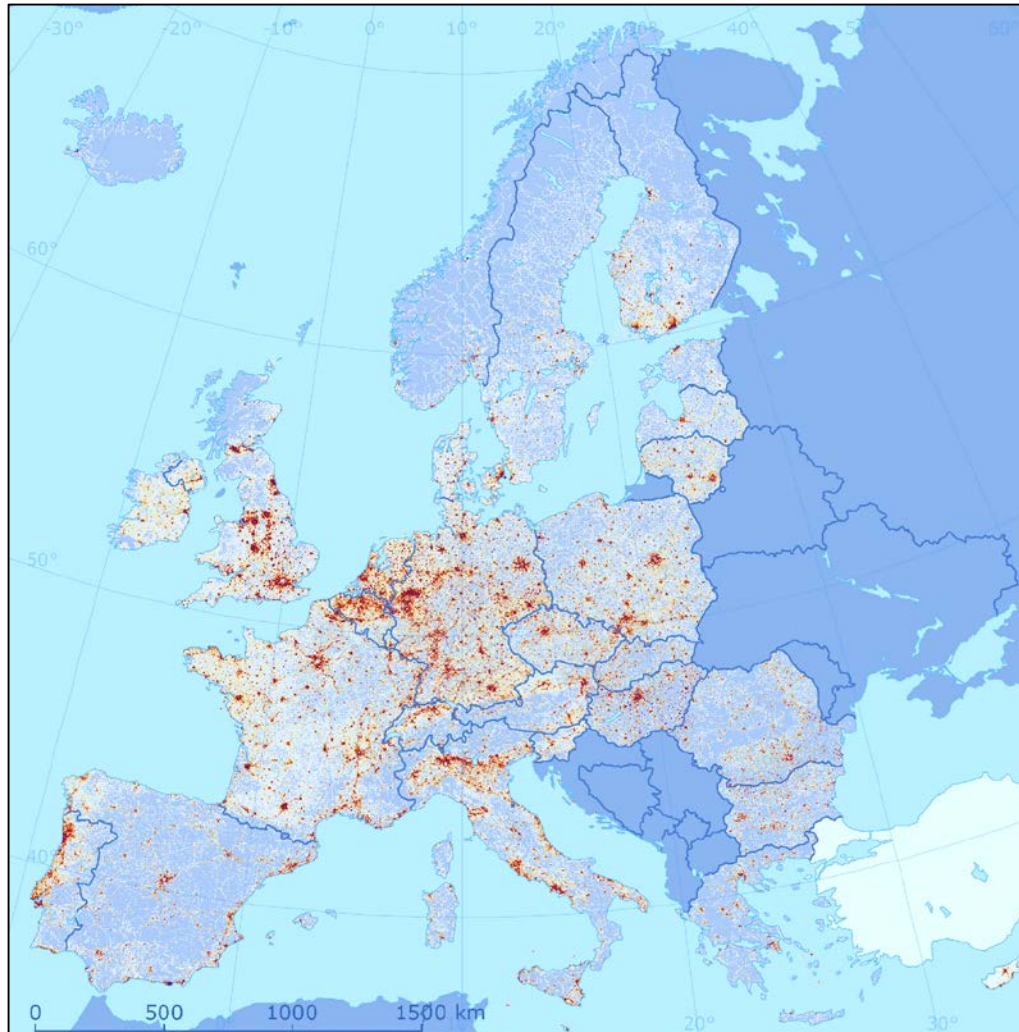


Passenger satisfaction and the urban challenge



- 36 member organisations
- 21 countries

➤ An urban society – and increasingly so



Across the EU:

- 73% live in urban areas - 82% by 2050
- Generating 85% GDP

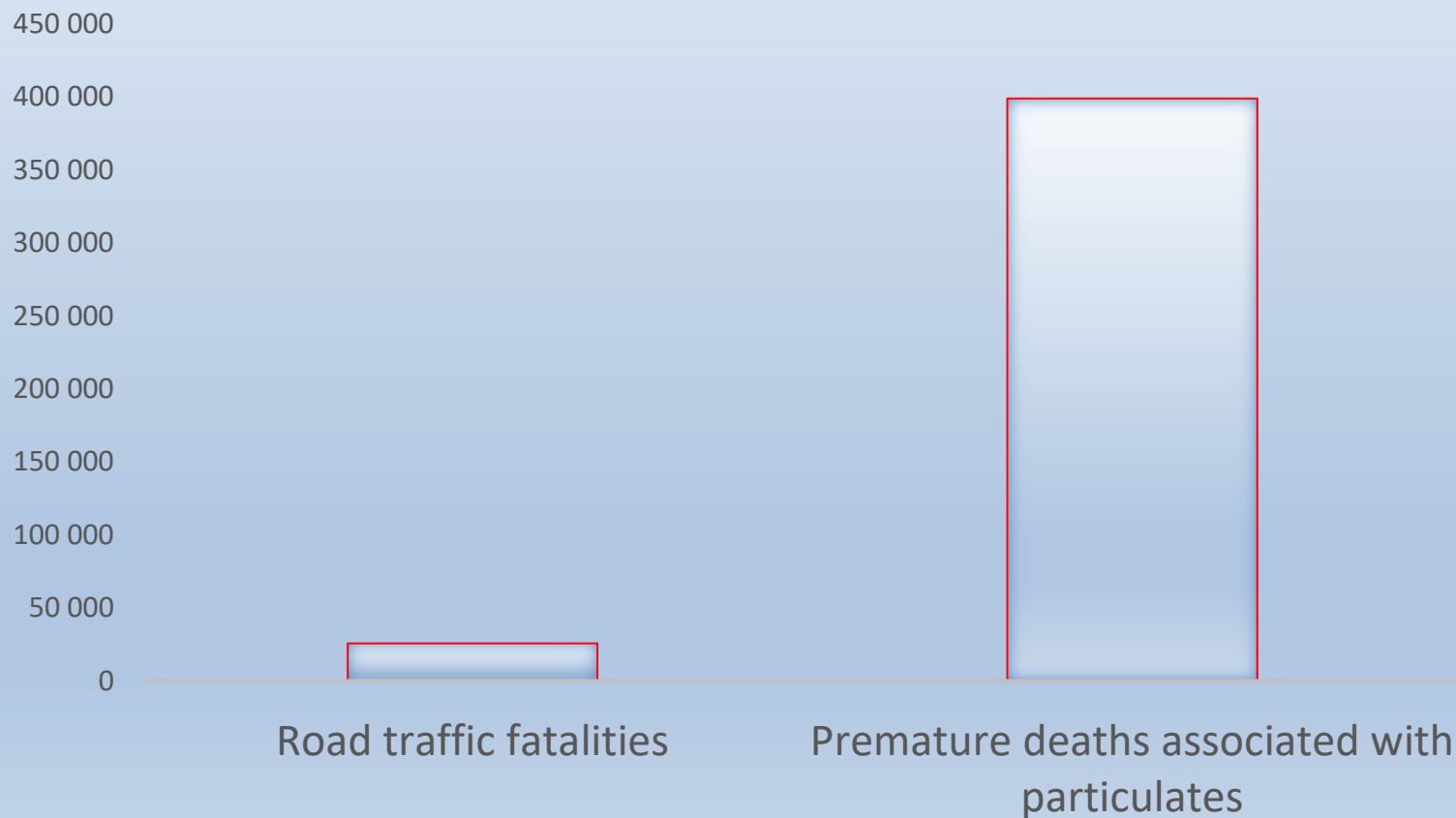
› Urban challenges

- Congestion
- Land supply
- Pollution:
 - Exhaust emissions
 - Non-exhaust emissions



Emerging realisation

ROAD TRAFFIC RELATED DEATHS, EU 2014 (SOURCE EEA; DG-MOVE)



Command economy,

or

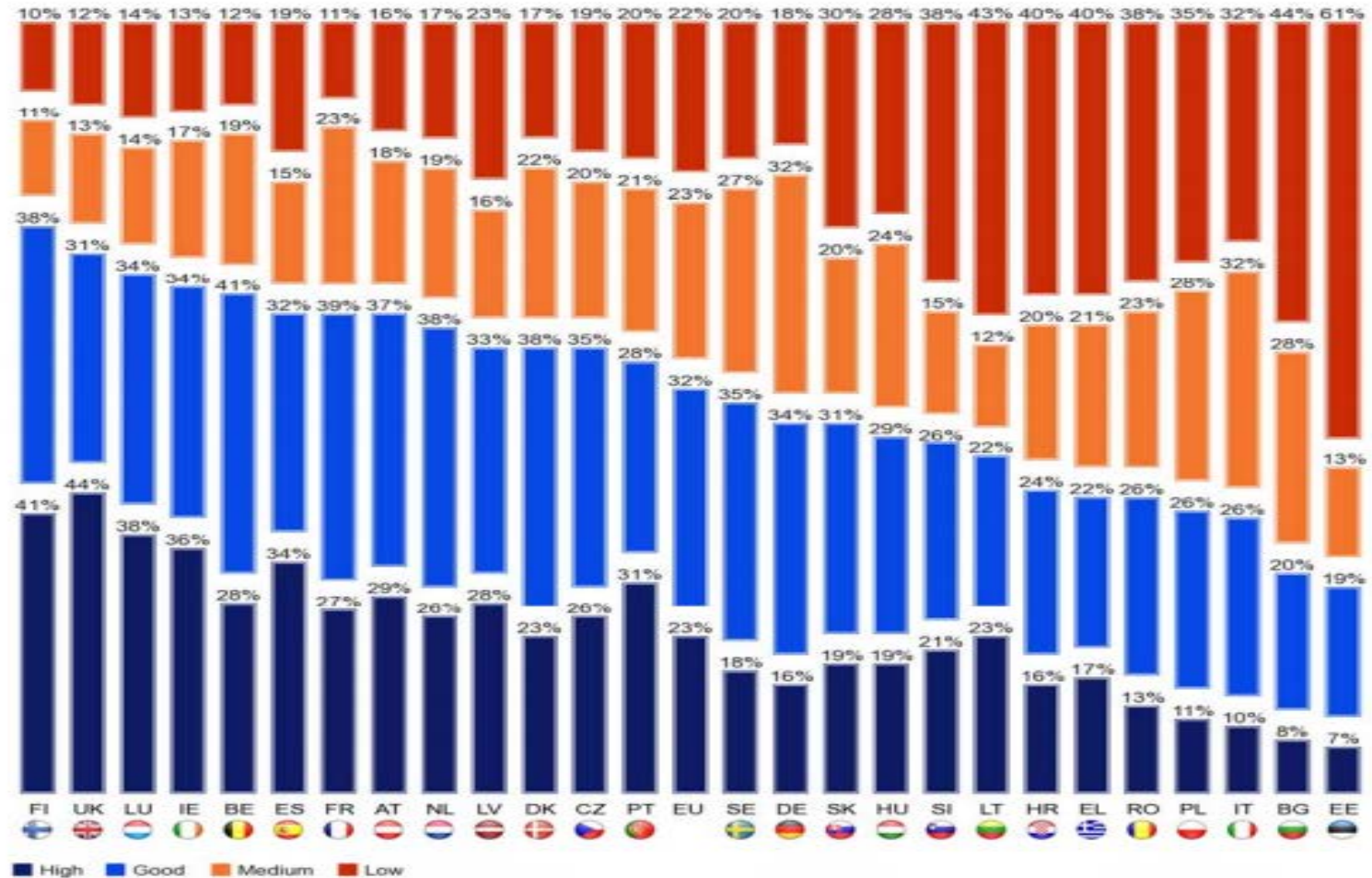
Consumer preference?

› Competitors?

- Will car-owners accept car-sharing?
- Will the non-exhaust emissions prove acceptable?

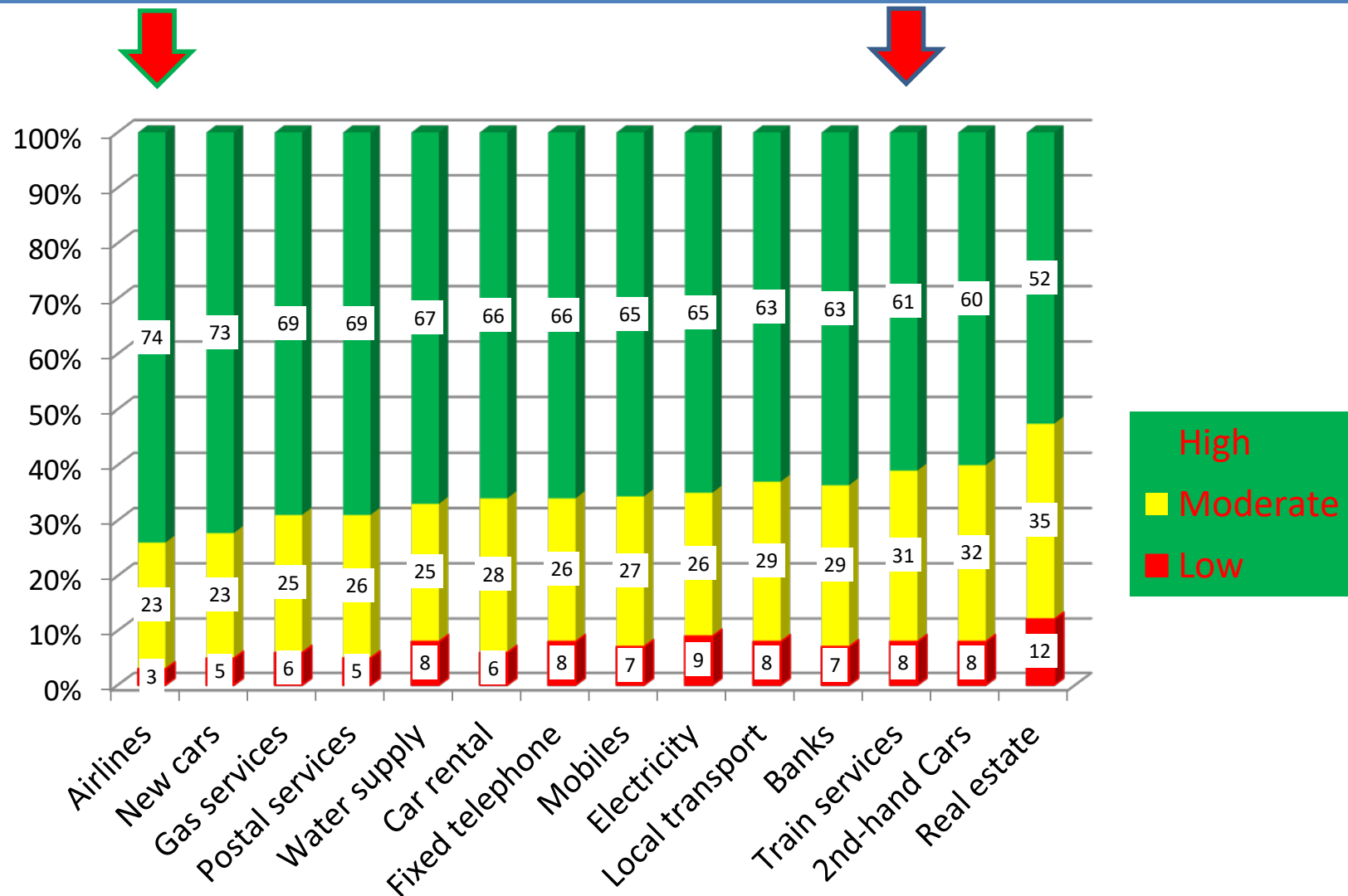


> 55:45 of rail users' satisfied: (Eurobarometer 382a)



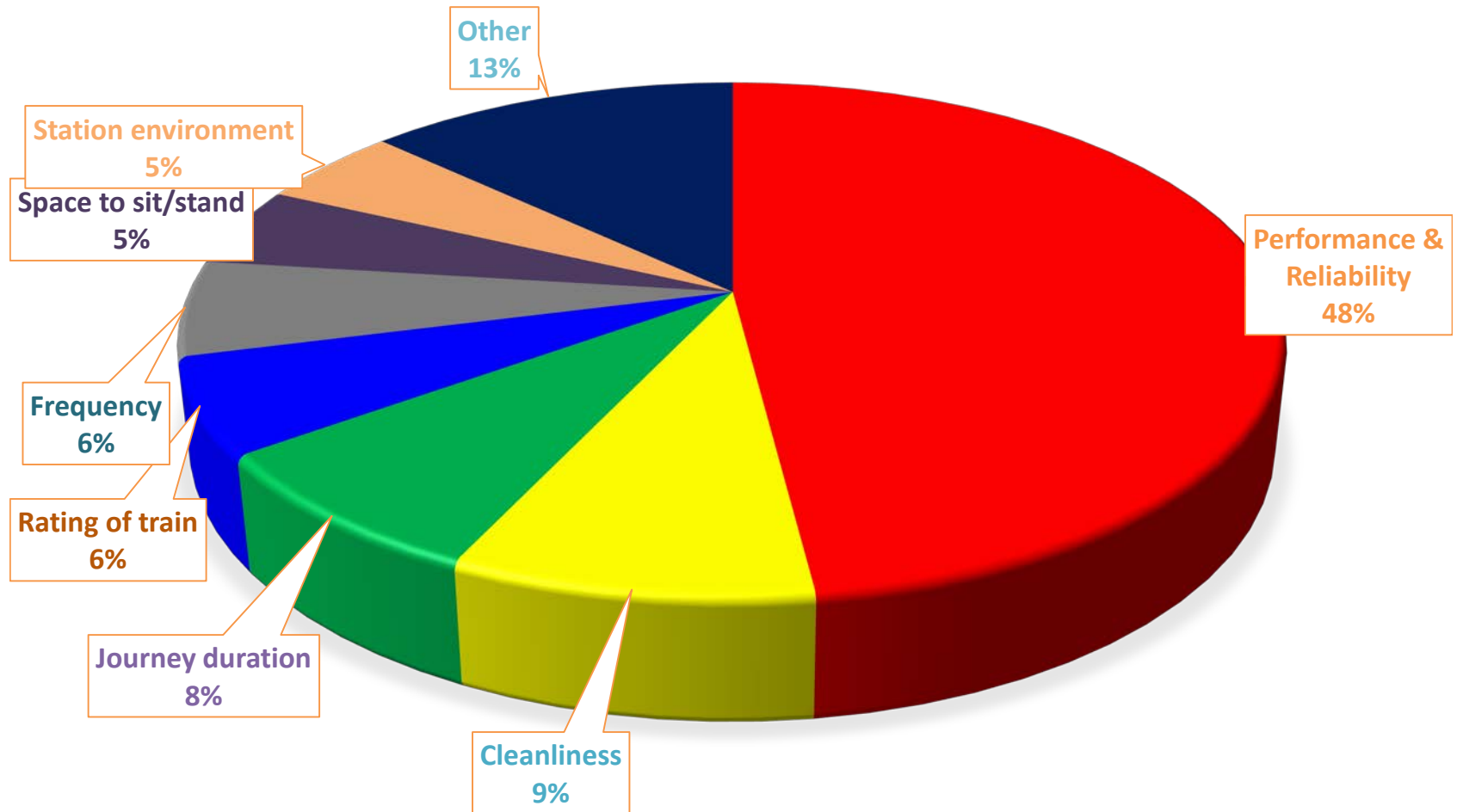
Poor comparative user satisfaction

EU Consumer Markets Scoreboard, 2016 – ‘To what extent did service offered live up to expectations?’

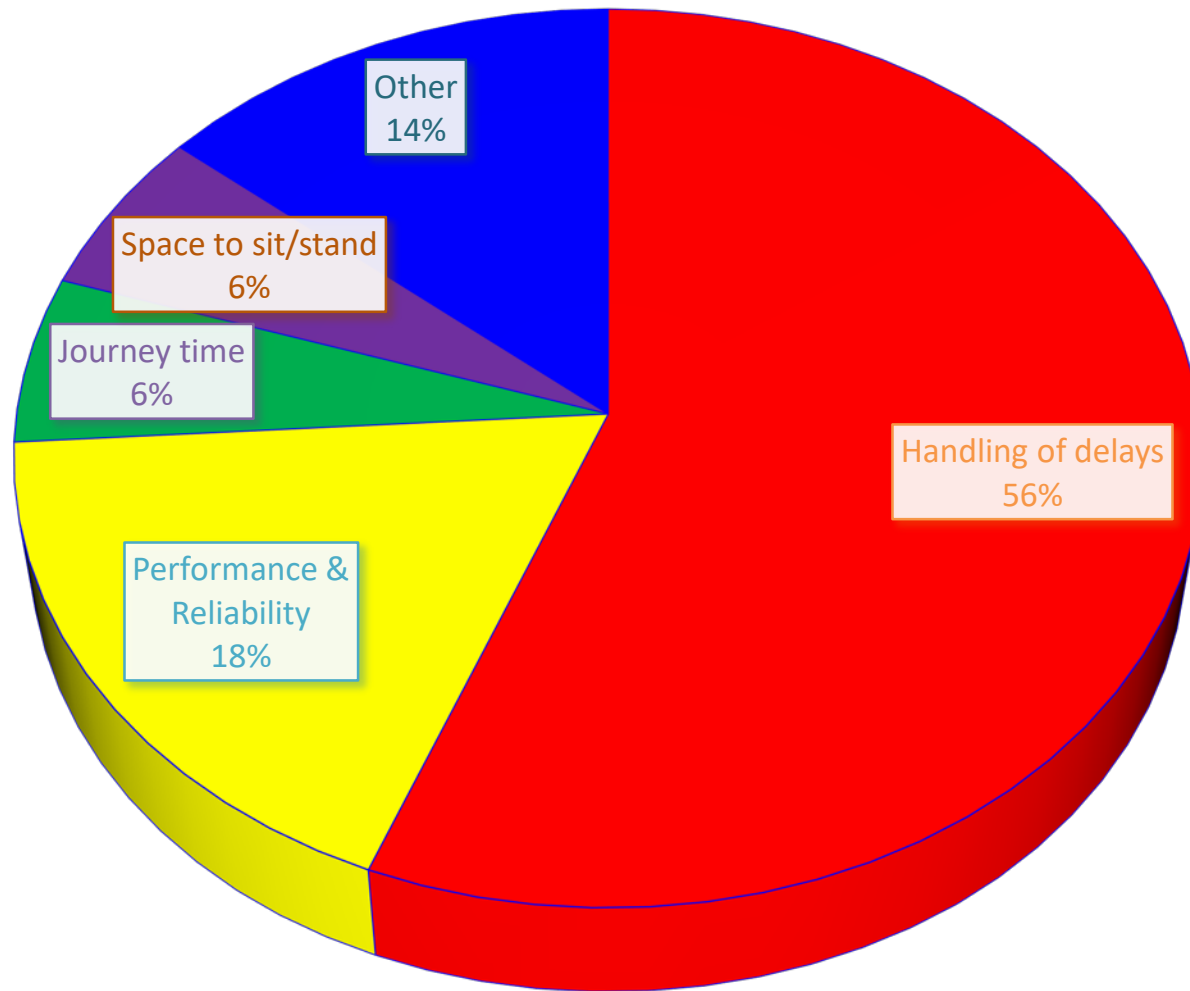


Drivers of passenger satisfaction:

National Passenger Survey, Transport Focus, GB

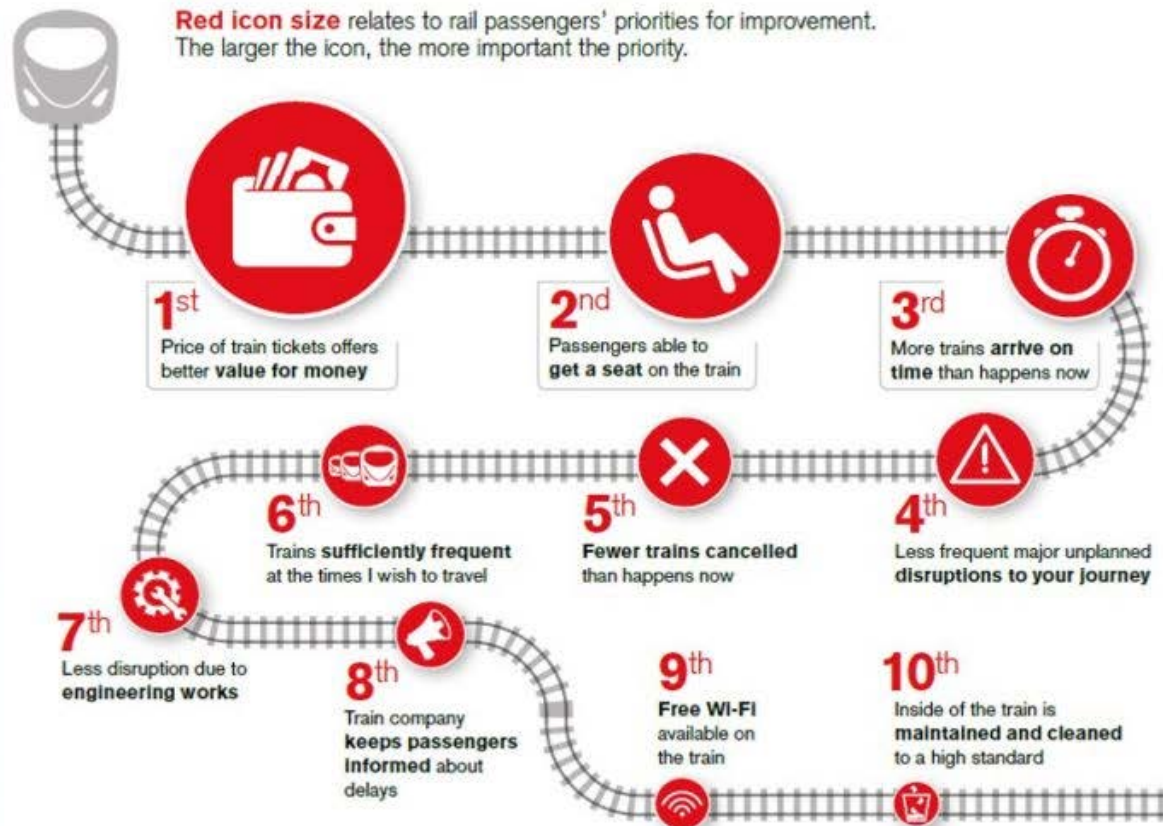


Drivers of passenger dissatisfaction: (National Passenger Survey, Transport Focus, GB)



Passengers' priorities for improvement (Transport Focus, GB)

Rail passengers' priorities for improvement 2017



Sample size **12,804**

How customers prioritise further areas for improvement

- 11th** Journey time is reduced
- 12th** Accurate and timely information available at stations
- 13th** Well-maintained, clean toilet facilities on every train
- 14th** Accurate and timely information provided on trains
- 15th** Improved personal security on the train
- 16th** Connections with other train services are always good
- 17th** Good connections with other public transport at stations
- 18th** Easier to buy the right ticket
- 19th** Improved personal security at the station
- 20th** Seating area on train is more comfortable
- 21st** Stations maintained and cleaned to a high standard
- 22nd** More room to stand comfortably on busy trains
- 23rd** Train staff have a positive, helpful attitude
- 24th** Station staff have a positive, helpful attitude
- 25th** Free Wi-Fi available at the station
- 26th** Sufficient space on train for passengers' luggage
- 27th** More staff available at stations to help passengers
- 28th** More staff available on trains to help passengers
- 29th** Access from station entrance to boarding train is step-free
- 30th** Easier to claim compensation when delayed
- 31st** Better mobile phone signal on trains

› The digital opportunity

- **Delivering services:** *e.g. train management and control systems*
- **Planning services:** *e.g. using Big Data to understand mobility patterns*
- **Accessing services:** *e.g. mobility as a service*

BUT:

- **Who will be in control, operators or data-integrators?**
- **Can public transport out-compete hail-a-ride?**



Thank you for your attention!

www.epf.eu

