

Innovation for passenger rail services

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- 38 member & associate organisations
- 21 countries
- Independent voice for public transport users on Europe



Navigating the Valley of Death



› Drivers of demand-led innovation

- Demand determines implementation:
 - Responding to public policy challenges
 - Meeting end-users' needs

› Market levers and public policy

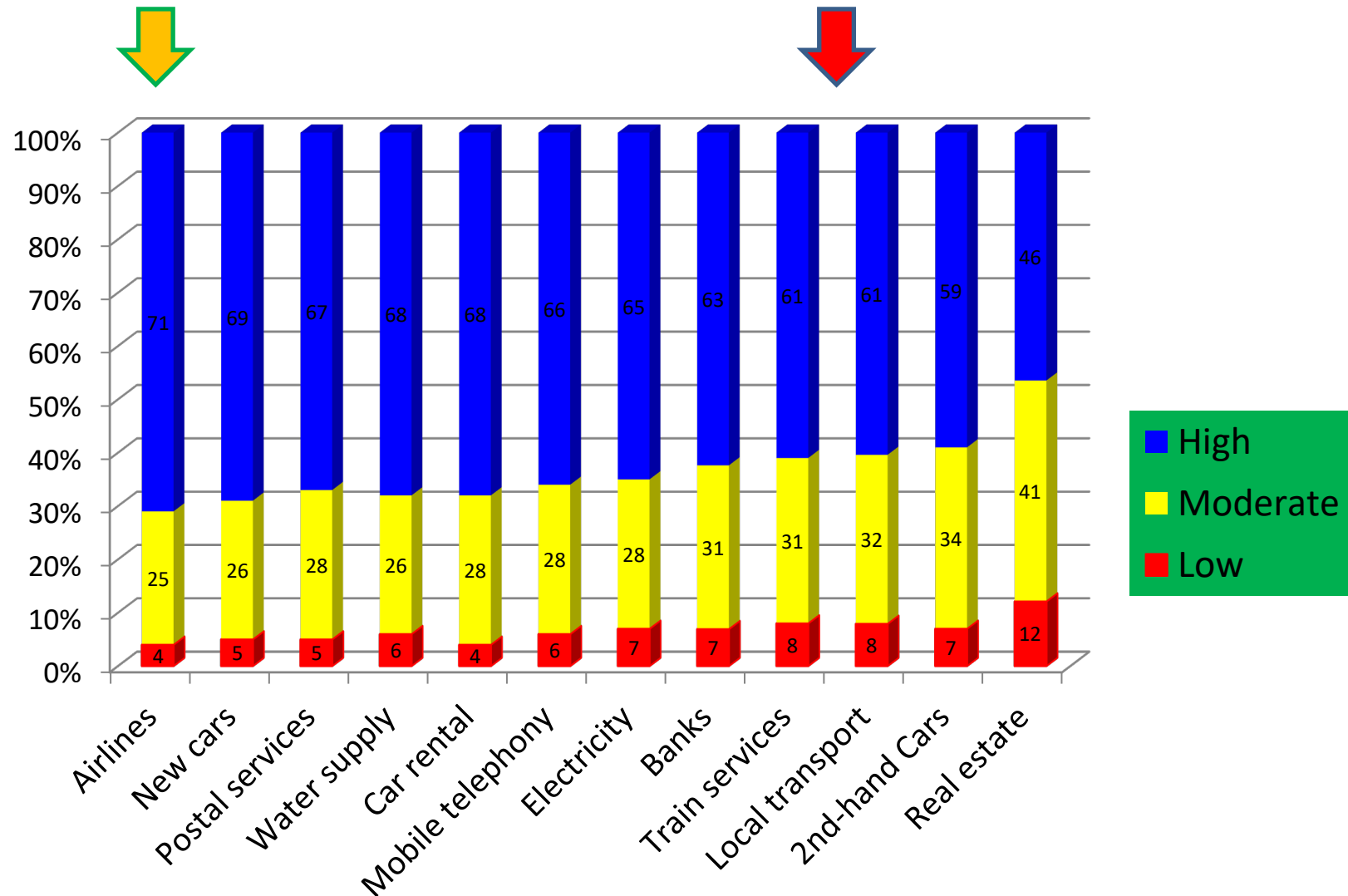
- Responding to emerging policy priorities, e.g.:
 - More for less
 - Decarbonisation
 - Addressing public health concerns
 - More efficient land use/ relieving congestion
 - Addressing demographic change
 - Synchro-mobility and modal shift

› From transport to mobility

- Meeting end-users' needs, e.g.:
 - Identifying passengers' priorities
 - End-to-end journeys; rail just one part
 - Mobility as a service
 - Understanding the drivers of satisfaction
 - Passenger satisfaction
 - From distress purchase to mode of choice

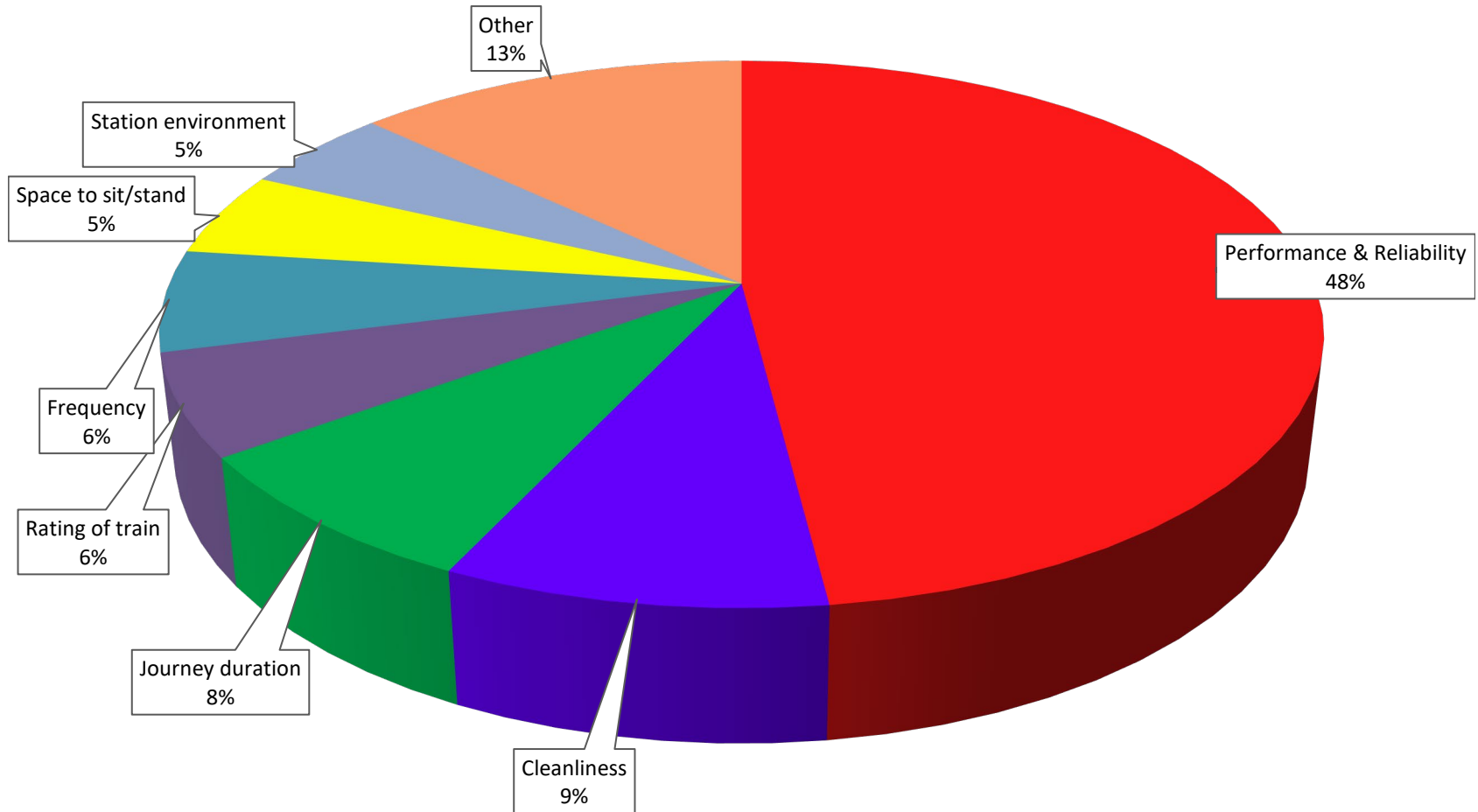
Poor comparative user satisfaction

EU Consumer Markets Scoreboard, 2018 – ‘To what extent did services/products offered live up to expectations?’

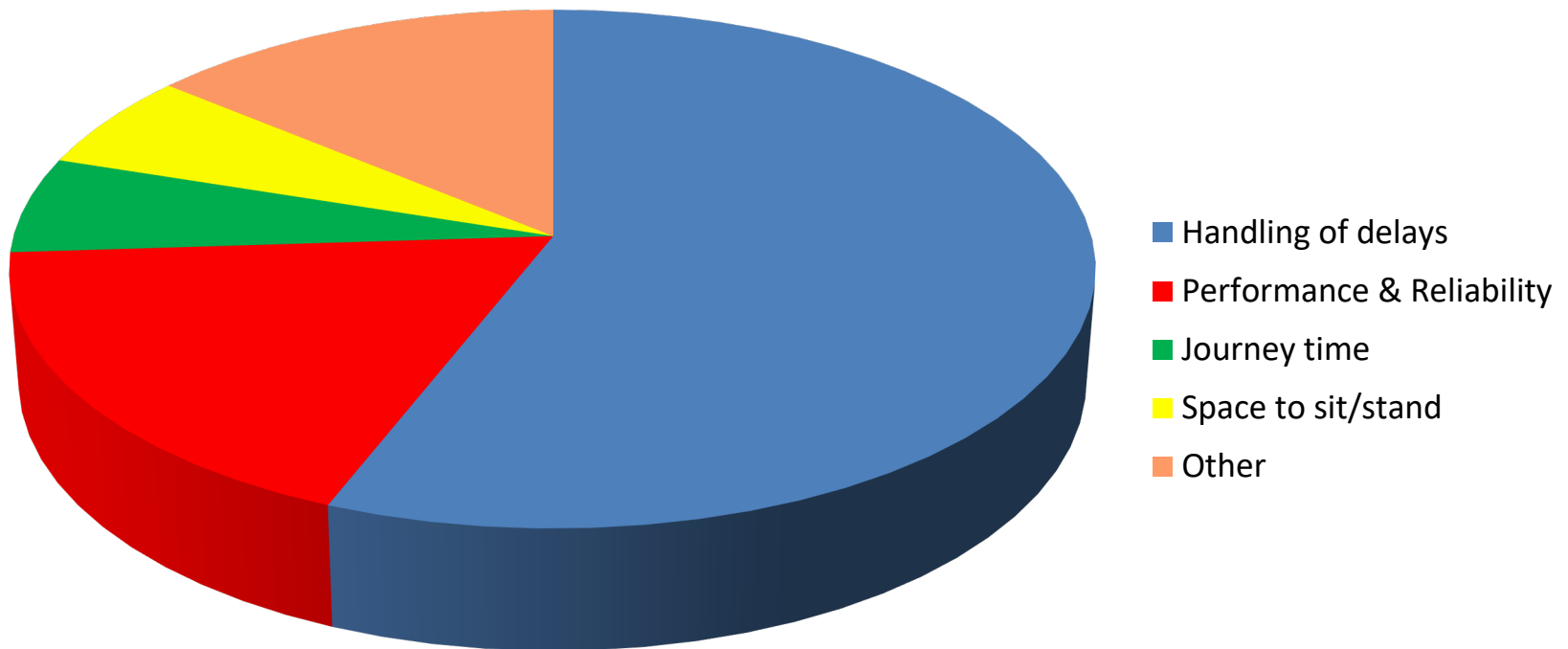


Drivers of passenger satisfaction:

National Passenger Survey, Transport Focus, GB



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



› Rail passengers' priorities for improvement

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 key challenges for innovators: what passengers want

- Better value (more for less)
- Capacity (a seat when they want to travel)
- Punctuality
- Minimal disruption (reliability)
- Dependability (delivery of product offering)
- Improved asset reliability
- Keeping passengers informed: better and usefully
- Securing passenger safety

› The key enablers – some examples

- More for less: *standardisation, low-cost solutions, intelligent vehicles, smart infrastructure*
- Capacity: *automation, digitalisation, TMS, adaptable assets*
- Punctuality: *capacity, asset reliability, discipline*
- Minimise disruption: *advanced control systems, diversionary capacity*
- Improved asset reliability: *Real-time health monitoring, low-cost short-life plug and play assets, smart technologies, mechatronics' applications*
- Keeping passengers informed, better and usefully: *real-time personalised information, open data access*
- User-centred: *focus on systems' interfaces, integrated cross-modal telematics; non-invasive security measures*

› Some key considerations

- We are entering the era of synchro-mobility
- End-to-end journeys are almost invariably cross-modal
- Focus on end-users' needs in implementing innovation

› The key question

- What's in it for the passenger (and the tax-payer)?

➤ **Thank you for your attention!**
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