

National Transport Strategy (NTS) Draft for Consultation

Transport Focus Response

Introduction

Transport Focus is the independent consumer watchdog representing the interests of Britain's rail passengers, users of motorway and major 'A' roads in England and bus, coach and tram users in England, outside of London. We welcome the opportunity to respond to the NTS draft for consultation.

Transport Focus was pleased to be a member of the partnership group working in a collaborative approach with other stakeholders to develop the draft NTS for consultation.

Transport Focus's response to the consultation is informed both by our extensive evidence base and insight gathered through our participation in the partnership group process.

Is the Vision that is set out for the National Transport Strategy the right Vision for transport policy over the next 20 years?

The vision applies across all of Scotland and is equally relevant and inclusive to both people and place. As such the vision is identifiable, acceptable, that further recognises the differences between our cities, towns and rural areas. Achieving the vision will be dependent on the delivery, monitoring and evaluation of the priorities, outcomes, policies and enablers which underpin the vision.

Are the Priorities and Outcomes that the Strategy is trying to achieve the right Priorities and Outcomes for transport policy over the next 20 years?

The four strategic priorities are ones that will be at the forefront of transport decision-making, over the next twenty years.

Promotes equality

The importance of equality cannot be underestimated. Accessible and affordable transport can help facilitate social networks, improve access to employment, education, hospitals and promote well-being.

Takes climate action

Scotland's Programme for Government recognised that Scotland has committed to some of the toughest statutory emission reductions in the world, adopting a net zero

emissions target by 2045. The NTS must ensure that transport contributes to this target, over the lifetime of the strategy.

Helps our economy prosper

The outcome to provide a reliable, efficient and high-quality transport resonates with our findings in both the National Rail Passenger Survey (NRPS)¹ and Bus Passenger Survey (BPS)² where satisfaction of the overall journey experience relates to reliability, timeliness, journey time and travelling environment.

Improves our health and wellbeing

Growing public awareness about the impact on health and wellbeing of local air pollution caused by vehicles is an opportunity to make the case for a more sustainable approach to transport that has a positive impact on our health and wellbeing.

Are some of these Priorities and Outcomes more important than others or are they equally important?

The priorities and outcomes are equally important but their application at a regional and local level will depend on regional and local circumstances. For example, our Rail Passengers Priorities for Improvement³ gave the top thirty priorities for improvement at a Scotland-wide level. However, there may well be a difference in ranking based on the current service in different regions. This will be equally applicable across modes and any particular application of an outcome may have a greater impact in one region as compared to another.

Are the Challenges the Strategy highlights in Chapter 3 the key Challenges for transport, or are there others the Strategy should focus on?

A number of challenges has been clearly identified that require to be met, in order to achieve the desired outcomes of the NTS.

Affordability

Our research⁴ on bus to inform the recent Transport Bill recognised value for money as the highest priority for improvement.

¹ National Rail Passenger Survey - Spring 2019 Main Report

² Bus Passenger Survey – Autumn 2018 (Scotland)

³ *Rail Passengers' Priorities for Improvement* 2017 (Scotland)

⁴ Actions to Benefit Passengers – Transport Bill

Gender inequalities

Our research⁵ shows investment is also needed in improvements for young people. In some respects, young people want the same thing from their bus journey as their fellow passengers, ranking value for money, punctuality and reliability highly as priorities for improvement. However, there are key differences.

They don't feel that services are designed with them in mind or that enough is being done to make them feel valued. Not knowing how the system works or what to do is a barrier and a source of anxiety about 'getting it right'. Improving the journey experience is important; young people notice poor quality provision. There is a need to design systems better, learning from other industries in the way they appeal to young people. Fares for young people are confusing and inconsistent.

Our research⁶ highlighted the increased levels of feeling of security and fear of violence by women.

Accessibility

Transport Focus holds an accessibility forum twice a year that examines the concerns of both an ageing population and people with disabilities to provide a framework for delivering improvement to their travelling experience.

Transport Focus has conducted ground-breaking research in England, into the specific needs of disabled motorists. We would welcome the opportunity to repeat this survey in Scotland, where the greater travel distances between built-up areas may present greater issues to disabled motorists

Climate Change

The Government's ambitions around climate change are necessarily challenging. We all need nudging towards more sustainable forms of transport. Non-users of rail and bus need to be understood better in order to drive a modal shift: what will really attract new passengers?

This poses a particular challenge for rail: how to attract more passengers at off peak times in particular? Bus use is declining in some areas: how can this be reversed? Transport Focus's campaign⁷ will help the understanding of these issues. The move to electric vehicles throws up some key consumer issues around charging point and payments. There is also a raft of opportunities and risks arising from autonomous and (shared) 'on demand transport' using the road network.

⁵ *Using the bus – What young people think* - 2018

⁶ *Passenger satisfaction with personal security on the railway* - 2013

⁷ #GiveBusAGo - 2019

However, nobody wants to be forced into changing their behaviour. We all make our transport choices through trading off cost, convenience, choice, control and, increasingly, climate. Making more sustainable forms of transport a more attractive choice will be key.

Transport Focus could assist Government as it works out new strategies to change travel behaviour. Having an independent, multi-modal view from the consumer perspective will be vital to Government and the public.

While road users should be encouraged to switch to public transport, road will remain for many years the dominant form of transport. Indeed, Scotland's ambitious 2045 net zero target may encourage a faster take-up of EVs, than elsewhere in the UK. It is therefore vital to understand, and act on, the satisfaction of all groups of road users (including women, the disabled, HGV drivers, and non-motorised users, etc). Transport Focus could extend its existing road survey to Scotland, to ensure that the voices of these and other groups are heard. As the set-up costs have already been borne, this could be done in a cost-effective way.

Decline in Bus Use

For example, the NTS recognises the challenge of declining bus use. However, our BPS indicates a high level of overall satisfaction with bus travel. People who use the bus love the bus! Almost nine out of ten bus users told the Transport Focus Bus Passenger Survey they were satisfied with their most recent journey. Research also indicates that around a fifth of car journeys could well be made by bus. Yet many people don't view the bus as a transport mode of choice.

Reducing barriers to bus travel is vital - to help more people choose bus and make buses a more attractive and sustainable choice. Existing bus passengers want more reliable, frequent services going to more places, simpler fares that are better value for money and more useful information.

As the independent bus passenger watchdog, Transport Focus has chosen to work in-depth in the West Midlands. The region is bucking the national trend of falling passenger numbers. This is no accident - the West Midlands has a large population, engaged local authorities and bus operators, and a dynamic regional Bus Alliance that Transport Focus chairs. Transport Focus is now launching a campaign to encourage many more people in the West Midlands to Give Bus A Go.

The campaign aims to, identify the barriers to bus as a mode of choice for people, identify interventions to break down these barriers by concentrating on key passenger priorities and share the learning and emerging best practice gained to influence operators and all tiers of government.

To kick start the campaign Transport Focus is working with people in the West Midlands - 'busketeers' - who rarely or never travel by bus to Give Bus A Go in September. These individuals have agreed to use bus for some of their day-to-day journeys and to feedback on their experiences to Transport Focus using an app and over social media using #GiveBusAGo.

The top two reasons people don't get the bus are because they think it will take too long and cost too much. Transport Focus will be looking in-depth at three priority areas of improvement for passengers. It will work in partnership with bus operators and local authorities across the region to understand the current challenges and to trial new initiatives to improve the passenger experience.

What are the key elements of the journey that make people feel that they are getting good value for money from any bus journey? Transport Focus wants to understand what value for money means to people.

Transport Focus wants to understand how passengers feel about delays and identify where new operator interventions could increase bus patronage and drive up passenger satisfaction. Transport Focus will seek to understand what is being done by Transport for the West Midlands, highway authorities, National Express and other operators to tackle delays.

How is new technology shaping the expectations of non-users and less frequent bus users? What lessons can Transport for the West Midlands and bus operators learn about how best to communicate with existing and potential customers? Transport Focus will carry out research to better understand how to reduce any barriers to bus travel that arise from inadequate information.

Transport Focus will use these to highlight benefits of bus travel and to provide feedback to the industry on how to improve any relevant areas of the journey. The findings from the campaign can be shared across Scotland and similar campaigns undertaken in different parts of Scotland to understand the local and regional barriers to inform emerging strategies to grow the bus market.

Reliability and Demand Management

Analysis of NRPS shows that punctuality is the biggest single driver of satisfaction while managing delays is the biggest single driver of dissatisfaction.

Work to explore in detail the correlation between passenger satisfaction with punctuality, as measured by NRPS, and actual train performance for a three to four-year period found:

- Average lateness experienced by passengers is worse than that recorded for train services. This is because of the effect of cancellations and because many trains that are on time at their destination are late at intermediate stations.
- On average, passenger satisfaction with punctuality reduces by between two and three percentage points with every minute of delay.
- Commuters (except those travelling long distances) notice lateness after one minute of delay, not just after the five or ten minutes allowed by PPM. Their satisfaction with punctuality falls 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

The effect of performance on passenger satisfaction can be clearly demonstrated by mapping passenger satisfaction with punctuality from each NRPS wave against the trends for Public Performance Measure (PPM) and right time.

Transport Focus's research gives good understanding of passengers' expectations and aspirations. We have published insight⁸ into bus passengers' priorities for improvement, across a section of rural, urban and metropolitan areas, ranking thirty-one different criteria. We have also produced a 'simulator' that allows the research to be broken down by different characteristics - e.g. by bus operator, by region, by journey purpose and by passenger characteristics - age, disability etc. The top five priorities for improvement from our research were:

- Better value for money from bus journeys
- More buses arriving on time at your bus stop
- More journeys on buses running to time
- Buses running more often than they do now
- More effort made to tackle any anti-social behaviour

Information and Integration

Our research⁹ indicates the need to improve links between transport modes in Scotland and across the border, to help make public transport a more attractive option for those travelling for work, business and for leisure. multi-modal journey allows passengers to move from to with more than one journey leg and perhaps more than one mode of transport. Good offers seamless, convenient journeys timed connections. greater shift to more sustainable, integrated journeys will help to reduce emissions and congestion.

There are many simple and/or routine integrated journeys which passengers

⁸ *Bus passengers have their say* - 2016

⁹ *Transport Integration in Scotland* - 2014

made with minimal effort and hassle. This evidence shows that steps taken to create a more consistently seamless door-to-door travel experience - and to communicate about them to passengers - will help overcome negative perceptions.

Our research found that barriers to rail travel needed to be overcome before integrated journeys can be more widely considered across the general public. Currently, there is an issue of gaps between the *perception* of rail travel and the reality of the experience. However, rail is favoured in the research – with those tasked with giving rail a go more openminded to its benefits – which has revealed opportunities for promoting rail use at times when personal car use is less convenient. In doing so, there will be a need to challenge the car's strong status as the default benchmark of 'good travel' among infrequent/non-public transport users. This is more challenging in rural areas where there is an even stronger tendency towards the car given the lower frequency of transport provision at both peak and off-peak times.

There was no strong support for travelling more sustainably by public transport and minimising use of the car. Greener travel is unlikely to be given status unless personal priorities are met. Decisions on journeys were based on 'individual ease' – the need to make journeys as simple and as effortless as possible. Current circumstances make car journeys the far more appealing option over integrated transport.

Convenience, speed and cost were key considerations for a satisfactory travel experience, with a slightly differing emphasis placed on each depending on the individual, or the circumstance for the journey. These priorities need to be reviewed in light of different integrated transport combinations to ensure all needs are met for more consistently seamless transitions.

There were four key areas for attention which will enhance the experience of integrated travel for passengers and potential passengers.

Information - to give passengers the tools to proactively plan their journeys and make them smoother and less stressful overall. Travel environment - to improve the comfort and security of rail and integrated travel. Infrastructure and service provision to make rail and integrated travel as accessible and as tailored as possible around passengers' needs – for example, car parking for those in more remote areas with limited access to the station. Ticketing, costs and fares - to simplify the purchasing process for passengers by putting in place new technology to enhance convenience and to benefit passengers with potential cost-savings and greater flexibility of available transport options. For those who rarely or never used rail or other public transport, needs centred more on overcoming environmental barriers on rail and

public transport generally. Security and the cleanliness and comfort on trains were key.

More frequent rail users were interested in improvements which would refine the quality of routine and less routine integrated journeys by convenience, comfort and time. They welcomed advances in ticketing technology as they could see the benefits they would bring. Given the differing outlooks and needs of existing and potential passengers, all four areas should be treated with equal importance. Progress will help to make rail a more positive and credible choice overall, for more journeys and for more people. This will also help to address the needs of passengers who feel more vulnerable when travelling, including women and older people.

The proposed National Islands Plan (NIP) sets a direction of travel for the Scottish Government and provides a framework for action in order to meaningfully improve outcomes for island communities.

Currently, the cost of transport on islands is much higher, relative to income, than in the rest of Scotland. Journey times are often long and can require multiple interchanges, including an overnight stay, adding further costs. In addition, integrated ticketing is not always available, meaning that multiple tickets are required, further adding to price and complexity.

The strategy should take cognisance of the NIP and a monitoring and evaluation framework based upon our Ferry Passenger Survey could be aligned with the vision for transport to inform the Strategy's Delivery Plan.

Through the process to develop the National Transport Strategy, 14 policies have been identified that will deliver its Vision and Outcomes and address the Challenges. Are these the right policies to deliver Priorities and Outcomes of the National Transport Strategy?

The NTS recognises that over the twenty-year lifetime of the strategy both the policies and enablers have to be flexible and have been tested against the four stated priorities using a range of scenarios applicable to the priorities and outcomes. As such the policies are the correct ones to take forward to deliver the aims of the strategy.

Are some of these policies more important than others or are they equally important?

As discussed under the question on priorities and outcomes, the policies are equally important but their application at a regional and local level will depend on regional and local circumstances. This will be equally applicable across modes and any

particular application of a policy may have a greater impact in one region as compared to another.

However, another application would include sense checking both the policies and enablers against users' priorities for Improvement. Our research on bus, rail and road gives users' priorities for improvement and investment across these modes.

Are there specific decisions about transport in Scotland that are best taken at the national level (e.g. by Transport Scotland or the Scottish Government), at a regional (e.g. by Regional Transport Partnerships), or at a local level (e.g. by Local Authorities)?

For many people, transport remains an essentially local issue whereby appropriate decision-making is best made at that level. Decisions at regional level can address cross-boundary issues. However, all specific decisions must take cognisance of the NTS and other national policies.

Should local communities be involved in making decisions about transport in Scotland? If so, how should they be involved, and on which specific issues should they be involved in making decisions on?

Communities and the consumer voice should be strengthened as the decisions made will have an effect on their travel choices and behaviour. Our research shows that consumers want change and they want their voice to be heard. We believe there is considerable scope to transform engagement in the following areas.

Comprehensive social media activity. When we launched our "Make Delay Pay" campaign on 22 July, we used social media promotion for the first time. Consumers want to engage in different, new ways that suit them, and they want this to be immediate and easily accessible. The effect was dramatic. A relatively small investment produced around 1.6 million impressions in the first week - more than we have ever had.

Empowerment of consumers. A strong social media capacity will also help inform/inform/educate passengers on sustainable transport choices. Data visualisation techniques and videos can also be very effective at getting a simple message across to a great many people. Running a form of citizens jury/deliberative research to gather in-depth views/feedback on specific transport issues can be advantageous.

For example, as discussed earlier the Government's ambitions around climate change are necessarily challenging. We all need nudging towards more sustainable forms of transport. Non-users of rail and bus need to be understood better in order to drive a modal shift: what will really attract new passengers?

This poses a particular challenge for rail: how to attract more passengers at off peak times in particular? Bus use is declining in some areas: how can this be reversed? Transport Focus's campaign¹⁰ will help the understanding of these issues. The move to electric vehicles throws up some key consumer issues around charging point and payments. There is also a raft of opportunities and risks arising from autonomous and (shared) 'on demand transport' using the road network.

However, nobody wants to be forced into changing their behaviour. We all make our transport choices through trading off cost, convenience, choice, control and, increasingly, climate. Making more sustainable forms of transport a more attractive choice will be key. Involving consumers in those specific decisions where Transport Focus is uniquely positioned to provide independent advice based on the strengthened consumer voice to assist delivery of the strategy's outcomes.

Does the National Transport Strategy address the needs of transport users across Scotland, including citizens and businesses located in different parts of the country?

The draft NTS, vision, outcomes, strategies, policies and enablers go a great way to address the needs of transport users. However, this requires to be measured with a robust evidence base over the lifetime of the strategy to ensure the desired outcomes are achieved. We address this further in response to Chapter 6.

What aspects of the transport system work well at the moment?

What practical actions would you like to see the National Transport Strategy take to encourage and promote these?

What aspects of the transport system do not work well at the moment?

What practical actions would you like to see the National Transport Strategy take to improve these?

We have taken these questions together as consistency results in the transport system work well and inconsistency results in the transport system not working well.

Performance (frequency, reliability and punctuality) is a core requirement. Our research¹¹ with bus passengers shows that it is a high priority for improvement in its own right but is also the bedrock of trust.

¹⁰ #GiveBusAGo - 2019

¹¹ *Bus passengers have their say* - 2016

Passengers trust bus services when there is consistency in delivering the essentials; inconsistent service delivery adversely impacts trust ratings. Our previous research¹² looked at when, where and why buses are delayed and what can be done to help them run on time. It identified systemic reasons for lateness (adverse traffic patterns, unhelpful parking, unrealistic timetables, driver-changeover times being too tight to be reliable) and variable issues (coping with driver absences, scheduling road works, coping with vehicles going out of service).

We believe there is real benefit in bus operators listening to passengers and, in particular, to drivers, to help identify specific causes of delay. We also want to see better and more consistent use of performance data to identify problem areas. Value for money is the highest priority for improvement. Cost is also something that represents a barrier to use for infrequent/non-users. This is also something that we have looked at in previous research¹³.

While better performance will naturally improve perceptions of value for money we found that much more could be done to improve passengers' awareness of fares. Passengers didn't realise what ticket types existed, how they could buy them or where they could find out the information they needed. They relied mainly on word of mouth and the bus driver for information and risked missing out on the best deal. It also begs the question of how much business is lost because potential passengers simply don't know how to use the bus or because people can't find the ideal ticket for their needs. Our research also shows that smart ticketing can be an enabler of trust. The ability to cap fares helps passengers trust that they have been sold the correct, best-value fare available. It also provides a mechanism on which to bolt some form of loyalty scheme that recognises and rewards people for travelling.

Our research¹⁴ with rail passengers shows that trust in Competence: punctuality/reliability is the single most important 'hygiene' factor overall; if this isn't right then trust just isn't possible. The central importance of punctuality/reliability chimes with other Transport Focus research where punctuality is a key driver of passenger satisfaction with their journey and features strongly in passenger priorities for improvement.

Trust in Motive: provide passengers with a sense that the train company is looking out for them (and not purely driven by commercial goals): treating customers fairly, being clearly 'on my side' and communicating well can all help drive up levels of trust.

¹² *Exploring bus service punctuality* - 2014

¹³ *Bus passengers' views on value for money* - 2013

¹⁴ *Trust in train operators - an exploration of issues influencing passenger trust in rail* - 2019

Trust in Judgement: passengers consider the overall judgement of train companies are they truthful, do they act with honesty and integrity, do they have high principles and a good reputation. People look to all these things to gain a sense of whether, or not, a train company is trustworthy.

Ensuring the transport system delivers consistently good performance is a practical action that will build passenger trust.

Chapter 6 of the Strategy sets out immediate actions the Scottish Government will take in three key areas: Increasing Accountability; Strengthening Evidence; and Managing Demand. Is there anything you would like to say about these actions?

The requirement for the NTS to be accountable to transport users and for an informed evidence base to support its delivery is essential.

Transport Focus has built an enviable reputation for independent, multimodal, top quality insight and policy work which is useful to transport decision makers. Our existing tracker surveys across all modes could be used to benchmark satisfaction and trust with the strategy.

Transport Focus is extracting more value for transport users and others from our existing tracker surveys. For example, we have boosted online completion of our flagship National Rail Passenger Survey and have been increasing engagement on the Transport User Panel online. Artificial Intelligence is now used to analyse the wealth of verbatim comments collected. All Transport Focus's insight data is now accessible online and available to all via our Data Hub.

We have been trialling Spotlight which is a new product that transport users can feedback through a new phone-based product. It simply asks: 'how was your last journey?' and 'why did you say that?'. Transport users on any mode can tell us about their experience. AI then analyses, categorises and groups the responses. The initial results have potential.

Ensuring consumers are at the heart of the new NTS. We can design a robust consumer monitoring and evaluation framework to measure and report on the challenges and achieving desired outcomes at a national, regional and local level across all transport modes. The monitoring and evaluation framework could be aligned with the vision for transport and each individual target to inform the Strategy's Delivery Plan.

The Scottish Government's ambitions to tackle climate change are necessarily challenging with the new 'net zero' by 2045 emissions target. The transport sector, including surface transport, is now in the front line of efforts to meet this target.

As previously stated we all need 'nudging' towards more sustainable transport. To drive modal shift, users of rail and bus need to be better understood. What will attract new passengers to more sustainable transport options? These choices are made by trading off cost, convenience, choice, control and, increasingly climate.

As discussed earlier in our response, Transport Focus can provide the user perspective on new strategies to change travel behaviour as the strategy aims to embed the sustainable travel hierarchy in decision making. An example is the recent Transport Focus research on encouraging people to travel to airports using public rather than private transport. Having an independent, multi-modal view from the consumer perspective will be vital.