



# **Workplan 2017-18: Making a difference for transport users**

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Jeff Halliwell

# Foreword

Welcome to the 2017-18 Transport Focus Workplan which sets out our key campaign and work objectives plus financial forecasts for the year.

This is my third year of chairing Transport Focus. Even as significant investment is made in our transport networks and services, I think the need for professional, sustained consumer input is as great as ever.

We all use and depend on transport. The economy relies on it. But we all need transport to be as reliable as possible. If it's disrupted we need information to put us back in control.

This year we are focusing on three key objectives, in addition to all the other work set out in this Workplan. We will:

- aim to make sure the bus passenger voice is clearly heard in the growing number of local authority/bus company alliances. Our Bus Passenger Survey should be one of the key measures of success for all these alliances.
- press for road users' views to be at the heart of the 2020-25 investment strategy for England's strategic roads, including explicit commitments in the strategy to improve roadside facilities for lorry drivers and other users.
- press for the measure used to incentivise train performance to be the clear, understandable 'right-time' measure that passengers want to see. Retaining the existing abstract target, not based on passengers' views or experiences, will not build trust.

Of course, there is much more to our work than this, but we think these three goals are especially important.

Throughout this document you will see quotes

from staff which highlight what we have achieved. The organisation is proud of these and we hope you find them useful as evidence of how we have made a difference, and an indication of what we might achieve in future.

These wins would not have been possible without our great staff. We continue to recruit and retain good people with the right attitudes, skills, knowledge and experience. We continue to have a Board that is highly committed, engaged and effective.

This one-year Workplan, alongside the three-year Workplan and the Insight Plan, have been carefully developed and considered by the Transport Focus Board. We have had the benefit of extensive, in-depth feedback from our recent stakeholder attitude survey – thank you to everyone who took part. My role has been to provide advice and expertise alongside constructive challenge. I think this is a good Workplan which makes the best use of our resources over this coming year.

I enjoy chairing Transport Focus because I genuinely believe our work is important and makes a difference. I look forward to more success in the next 12 months and beyond.

**Jeff Halliwell**  
Chair

June 2017



Anthony Smith

# Introduction

Transport Focus exists to stick up for transport users, to champion their cause when things go wrong, and get things improved.

This year will present some gritty issues where the user voice needs to be heard. For example, the plans for the redevelopment of Euston station, the spread of the smart motorway programme and potential bus service franchising outside London. Whether it's longer-term issues or short-term problems, we will be there to ensure user views are heard.

The planned introduction of a rail passenger ombudsman by the rail industry is welcome and should help build trust and bring the railways into line with other industries. However, very careful signposting will be needed if passengers are to successfully navigate this new landscape. We will continue to advocate on behalf of rail passengers in relation to issues they raise with us.

Our new Strategic Roads User Survey will be piloted this year giving road users a stronger voice, which will start to drive change.

As bus passenger numbers drop in some parts of the country we want to understand why this is, why people are travelling in different ways and what is driving their choices. Reliability is probably key to this but more analysis is needed. Using our research, bus companies can find ways to boost bus passenger numbers, such as young people. We have more research on their views of bus travel, due out this year.

We also need to understand travel choices. Now that we represent users of roads and other forms of transport we can start stitching together what we know to help inform debates about the end-to-end user experience whichever forms of transport are used. We can then better understand why people make certain choices and help them

make better informed choices in future.

We need to make sure transport users know that a watchdog exists who can stand up for them and help with advice. We need to make sure our media presence is effective and sustained.

We will continue to innovate and modernise the way we collect user feedback. Alongside updating our tracker surveys on rail, bus, tram and building the new road survey, we need to develop, in partnership with the industries, new feedback systems. However, while we can speed up data collection, we want to retain the representativeness of the current surveys as much as we can – this is what makes them so useful and powerful. The surveys should continue to reflect the current 'population' of users of the various modes.

We have also re-organised ourselves to deliver the 20 per cent budget reduction required in the current financial year by our sponsors the Department for Transport. We have had to think carefully about what we focus on and how we do it. I am pleased to say we have been successful in attracting continued third party partnership funding, for our insight work in particular.

Our staff are key to our success. I am proud to lead this team. We all want transport services to improve and work hard to make that happen.

**Anthony Smith**  
Chief Executive

# 1 Who we are and what we do

## What is Transport Focus?

We are the independent, statutory, consumer watchdog for Britain's rail passengers, bus, coach and tram passengers in England (outside London) and all users of England's motorways and major 'A' roads – the Strategic Road Network (SRN). Transport Focus's statutory roots go back nearly 70 years.

We will be useful to those who make decisions about transport to help them make better decisions. We use evidence to drive change and make a difference. Transport Focus strives to give all transport users as powerful a voice as those that provide transport services and we listen to those users in a variety of ways.

We use a mixture of insight, active advocacy, user group engagement, speaking at events and public meetings to get our message across and secure change. We also communicate using the media (including social), our monthly newsletter (*Transport User Voice*), and our website.

The Scottish Government, Welsh Government and London Assembly each appoint one Board member, with others appointed by the Secretary of State for Transport. We have offices in London and Manchester and we have peripatetic workers and non-executive Board members spread across Great Britain.



"Transport Focus is a consumer organisation – a champion for the transport user. Our mission is to make a difference for transport users, to make transport services better."

### Main goals

Our plan *Making a difference for transport users: the next three years 2017-20* sets out the longer-term goals and the themes for our work. It also contains more information about us and how we work. Our *Insight Plan* sets out what insight work we have recently published and plan to carry out – it will be regularly updated.

There are four key themes outlined in our three-year plan:

- **making a difference for today's transport user**
- **making a difference for tomorrow's transport user**
- **making Transport Focus an insight and evidence hub**
- **creating a modern workplace for great people.**

In addition, we need to make sure we make best use of our resources with **excellent delivery, value for money and good governance**. We will spend around 35 per cent of our budget this year on insight activities. The amount may rise if third parties commission more.

This Workplan sets out what we are going to achieve and changes we are going to make happen this year, how we are going to go about it and what resources we have available to do this. It also sets out how we will measure our progress.

## 2 Plans for 2017-18

### Making a difference for today's transport user

#### Rail passengers

We will continue to carry out, modernise and publish the large-scale National Rail Passenger Survey (NRPS). This, like our other tracker surveys, measures passenger satisfaction on journeys they have just completed.

The NRPS reaches more than 65,000 passengers each year and its scope is increasing. The new Greater Anglia and ScotRail franchises mandate more frequent sampling of passenger opinion. More than a million passengers have taken part over 18 years. It is an authoritative (an Official Statistic), powerful comparative benchmark of train company and Network Rail performance.

The NRPS is increasingly used as a key performance measure in franchises with financial penalties if targets aren't met. Adding all these together, the NRPS drives cost-effective change by amplifying and focusing the passenger voice.

We will help to improve services for passengers by providing independent, evidence-based insight and advice from the passenger perspective. Where we make recommendations, we will track progress in addressing the issues. We will provide

*"Southern rail passengers can now claim Delay Repay compensation on the 15 minute mark instead of 30 - a direct result of our research and advocacy."*

Dan Taylor, Senior Policy Advisor

additional input on behalf of passengers using Govia Thameslink Railway, Great Western Railway, Greater Anglia, Northern and TransPennine Express where extra work is funded.

We will work with every train company regarding their NRPS scores and plans for improvement, spreading best practice and probing when poor performance creeps in. We will also take part in the pilot Western Route Supervisory Board.

We will work to improve the passenger experience during service disruption, whether caused by incidents or engineering works. This work, possible because of supplementary funding from the Rail Delivery Group (RDG), will focus in particular on improving the quality of communication with passengers, including about entitlement to compensation when delays occur.

We will work with Caledonian Sleeper to measure customer experience in new ways tailored to the unique rail sleeper experience. We will use this insight to help Caledonian Sleeper improve its services.

We will continue to try to resolve complaints where passengers and train companies have become deadlocked, and to address other issues raised by passengers. This year we expect to consider around 5,000 cases. Our ambition is to achieve at least 70 per cent passenger satisfaction with the way we have dealt with their issue. If the passenger wishes, we will pass relevant, unresolved cases efficiently to the new rail passenger ombudsman when established.

*"During the past year we have helped passengers resolve more than 3600 rail complaints."*

Kate O'Reilly  
Contact Team Manager

### Bus and tram passengers

We will continue to carry out the Bus Passenger Survey (BPS). This large-scale survey involves over 45,000 passengers each year. More than 270,000 passengers have taken part over seven years. It provides a powerful comparative benchmark of bus company and local authority performance, and continues to drive change in its own right. We will track progress in tackling the key issues that emerge from the survey.

We will prepare a BPS proposal for the Scottish and Welsh Governments and operators for further consideration (funded by governments and bus companies). This work will build on the successful 2016 BPS in Scotland.

*"Rail passengers can now claim cash for refunds rather than vouchers, and season ticket refunds are now calculated more fairly - both wins for our work."*

Jordan Sargeant, Stakeholder Manager

*"Brighton & Hove bus passengers can now get on and off new buses more easily, using two doors, following our research showing that passenger boarding time was an increasing problem."*

Robert Pain, Senior Insight Advisor





"Younger bus passengers in Manchester will soon be able to buy cheaper day tickets on local buses. We have pressed for better value for money for young passengers as a result of our research."

David Beer, Stakeholder Manager

We will focus in depth on two major locations where bus passenger satisfaction is under stress from poor punctuality. We will carry out detailed analysis of BPS data to understand the issues, including at individual route level. Working with stakeholders and bus operators, we expect this will lead to improvement action plans. To help spread best practice, we intend to publish a case study illustrating the problems and what can be done to address them.

We will carry out fresh analysis of the BPS data focusing on understanding how passenger satisfaction varies among younger people, those travelling at peak times and those using smart ticketing. This will give a richer understanding of the passenger experience and, in time, improve services.

We will carry out and publish the 2017 Tram Passenger Survey (TPS) and use the results to drive improvements. We will track progress in tackling the key issues that are highlighted by the survey.

"Edinburgh tram passengers said in the Tram Passenger Survey they were not happy with frequency. Now more trams are running and satisfaction has gone up."

Robert Samson  
Senior Stakeholder Manager

### Road users

We will help drive improvement by measuring satisfaction among users of England's strategic roads while we develop a new, robust survey. Specifically we will:

- publish the 2016-17 National Road Users' Satisfaction Survey (NRUSS) results, highlighting the aspects of journey experience linked most closely with overall satisfaction, and any differences in satisfaction by geography, road type and journey purpose
- carry out NRUSS in 2017-18 and share the results with Highways England, the Office of Rail and Road (ORR) and Department for Transport (DfT) each month
- continue to develop the new Strategic Roads User Survey (SRUS) which will replace NRUSS as the official measure of satisfaction with journeys on the SRN
- carry out and publish our first survey of satisfaction with the SRN among the logistics sector and coach company managers
- continue to develop our approach to assessing satisfaction among cyclists, pedestrians and equestrians who use or cross the SRN and publishing our initial research.



We will publish the findings of detailed research, carried out in partnership with Highways England, into how road users want road surface quality improved.

We will bring the road user perspective to debates about smart motorways by publishing findings of detailed research into road users' experiences using them. We will then track progress in addressing any recommendations we make.

We will work with Highways England to ensure that our research *Incidents and roadworks: a road user perspective* drives improvements for users. Specifically we will:

- press Highways England to improve communication with road users when there is disruption and to improve the accuracy and usefulness of scheduled roadworks information

- track progress in addressing the recommendations we made in light of the research, whether in relation to major new construction, renewal of existing infrastructure or routine maintenance.

We will work with Highways England and others to improve the road user experience of service areas. Specifically we will:

- track progress in addressing the recommendations made in our research *Take a break – Road users' views about roadside facilities*
- work with Highways England and others to explore options to improve road user confidence in services on major 'A' roads, with the intention that it leads to a pilot project
- publish the first Motorway Services Users Survey showing customer satisfaction across all official motorway services sites in England, and explore funding options to provide ongoing comparative benchmarking to help maintain and improve quality.

*"We made Dartford Crossing charging information clearer and ensured drivers who made an initial innocent mistake are treated leniently."*

Stuart Edwards, Stakeholder Manager



"We asked that the Stonehenge improvement scheme consider wider road user needs beyond locally affected communities. Highways England's consultation plan then included drivers who use that road from a much wider area: part of our drive to boost the user voice."

Lee Rowbotham, Senior Stakeholder Manager

## Making a difference for tomorrow's transport user

### Protecting and strengthening rail passenger rights

We will protect passengers' interests by:

- working to improve the National Rail Conditions of Travel and other train company documents to better reflect passengers' rights

- monitoring implementation of the Consumer Rights Act 2015 by train companies
- identifying and acting on issues flagged up in our complaints handling work, pursuing changes to industry practices, procedures and training
- seeking to improve complaints handling procedures, disabled people's protection policies and passenger's charters when they are reviewed
- responding to consultations on changes to ticket office opening hours and provision of station facilities.

### Improving passenger experiences during major engineering works

We will work to ensure that passengers are properly involved in decisions about how major engineering projects are carried out, with a view to minimising inconvenience while work takes place. We will benchmark passenger awareness of forthcoming works, help tailor communications as a result and measure customer satisfaction after the engineering works are finished.

Specifically we will:

- publish research into passenger awareness of major engineering works taking place this year at London Waterloo, carried out in partnership with Network Rail and South West Trains
- publish research into passengers' experiences and needs during engineering work, carried out in partnership with Great Western Railway and Northern



- publish a distillation of the key findings from research at Bath, London Waterloo and on Merseyside highlighting 'do and don't' messages when it comes to communicating with passengers
- explore opportunities for new research to inform major engineering works at Derby and London Euston in coming years.

### Fares and ticketing

Our insight and advocacy work (carried out over eight years) now underpins the *Action plan for information on rail fares and ticketing* created jointly by the Government, industry and Transport Focus. In time this will lead to improvements in ticket vending machines, fares information and, hopefully, end the need for 'split ticketing' (where a 'through fare' is more expensive than buying tickets for individual legs of the journey).

We will continue to represent passengers' interests through membership of the steering group for the action plan, which will be implemented between now and December 2017. This includes piloting of pricing designed to deal with split ticketing, which undermines trust in rail pricing. This is something we have called for over many years.

We will work with the Department for Transport (DfT), bus operators and the Rail Delivery Group (RDG) to improve ticket retailing, including use of smartcards, building on our extensive programme of research.

We are part of the monthly ministerial smart ticketing board (rail); the UK Cards/transport industry contactless project (rail and bus); and are involved in a project in the North of England (rail and bus). This work will help ensure effective introduction of smart ticketing.

We will be involved in monitoring implementation of new appeal processes for penalty fares. This should lead to clearer rules and more consistent implementation of them.

"A rail passenger who innocently forgets their railcard is now able to reclaim the cost of any new ticket they had to buy as a consequence. The Government has ordered the setting up of an independent Penalty Fare appeal body. These are examples of where our complaints casework has led to change."

Eleanor Carter, Senior Passenger Team Advisor

'Our Bus Passenger Survey identified anti-social behaviour as being an issue on West Midlands buses. Working as part of the local bus alliance this was targeted and scores have now improved.'

Linda McCord, Transport User Manager

### Boosting the user voice in long-term decision making about rail services

We will provide insight and advice to inform the upcoming East Midlands, Wales and Borders, South Eastern, Cross Country, Great Western and West Coast Partnership rail franchise replacement processes, as a result of supplementary funding from DfT and Transport for Wales. This should lead to more passenger-focused franchise specifications. Our ambition is that these franchises are shaped by effective engagement with passengers to understand and reflect their needs and priorities. We also play a role in reviewing the passenger-focused element of bids and provide a commentary to the DfT.

The next railway funding period (Control Period 6) starts on 1 April 2019 and key decisions about what it will contain are not far away. Passengers now provide 65 per cent of the railway's income and so we will:

- press for DfT and the Office of Rail and Road (ORR) to incentivise the rail industry to improve punctuality, measured in the way passengers think of it. That is, within one minute of what the timetable says or 'right-time' as the rail industry calls it
- press for a step change in how passengers' views shape long-term planning through Control Period 6 and beyond, including around the balance between project costs and disruption to passengers.

We will continue to develop the HS2 Customer Community, surveying and convening our panel and producing regular reports (funded by HS2 and ongoing since 2014) and will continue to chair the HS2's internal Customer Insight Steering Group. This should lead to HS2 services being more focused on passenger needs.

We will find out what passengers like and dislike about the existing design of trains as well as proposals for new or refurbished trains. This has and should help the design of more passenger-friendly train interiors (work funded by train leasing companies, local authorities, manufacturers and, potentially, HS2).

### Boosting the user voice in long-term decision making about bus services

We aim to establish, or develop existing, close working relationships in all six major conurbations in England, outside London. These are Greater Manchester, South Yorkshire, West Yorkshire, the West Midlands, Tyne and Wear and Merseyside.

We will seek to replicate our contributions to the work of the West Midlands Bus Alliance, which we chair, and the Liverpool City Region Bus Alliance. In addition, we will play an active role championing the bus user on the Bristol City Punctuality Task Force. This work has shown that the focus on passenger satisfaction helps ensure all parties agree on what improvements are needed, particularly with regard to punctuality.

We will ensure that passengers' views shape any changes that arise from the Bus Services Act, drawing on findings in our research on trust, priorities for improvement and among non-users. We will work with the DfT to help ensure that guidance related to the Act drives maximum benefit for passengers, including around timetable and fares information. Our ambition is to ensure that any franchising arrangements or partnerships have user needs at their core, including the effective measurement of satisfaction.

### Boosting the user voice in long-term decision making about England's strategic roads

We will strongly articulate road users' priorities in the process to develop the second Road Investment Strategy (RIS 2), covering the period 2020-25.

This will involve working with Highways England, DfT and ORR to help ensure that decisions about RIS 2 are closely aligned with road users' interests. Specifically we will:

- publish a summary of road users' priorities for 2020-25 and press for these to shape RIS 2
- work with Highways England, DfT and ORR to ensure that the 2020-25 SRN performance specification is aligned with road users' views identified in our research *Measuring performance of England's strategic roads: what road users want*, carried out in partnership with ORR
- carry out a final round of research with road users to sense check the proposed SRN performance specification for RIS 2 – again in partnership with ORR.

"Our research showed drivers' dislike of long road work sections. Shorter sections now feature in planning."

Louise Coward, Insight Manager



We will work with Highways England to help deepen road user input to key decisions which affect them, whether in relation to building a new road, upgrading an existing one or replacing worn out infrastructure. Specifically we will:

- work collaboratively with Highways England and others to develop engagement principles for finding out what road users want and their views about how work should be delivered to minimise disruption
- publish research into road users' views about how the A120 trunk road in Essex should be upgraded, following work in partnership with Essex County Council and Suffolk County Council
- explore opportunities to work with Highways England and others to ensure road users' views are at the heart of planning individual improvements, building on our A120 experience
- explore opportunities for research to ensure that the 30-year vision for the SRN is aligned with road user views.

We will look to carry out research into users' experiences of road tunnels to help inform the design of new tunnels on the SRN and guide refurbishment of existing ones.

### Accessibility

It is important that the voices of all transport users are heard, those with disabilities in particular. So we plan to:

- publish research into attitudes and experiences of rail passengers with a disability, and drive improvements by ensuring the findings are widely understood and acted on
- carry out and publish research into the experiences and needs of disabled users of England's motorways and major 'A' roads,

and drive improvements by ensuring the findings are widely understood and acted on

- co-ordinate and chair two meetings of our Accessibility Forum to help us better understand user needs and therefore advocate more effectively on their behalf
- liaise with the Disabled Persons Transport Advisory Committee to ensure maximum use of our insight
- engage with RDG to ensure that improvements planned to the Passenger Assist system deliver maximum benefits for those who use it
- analyse satisfaction among passengers with disabilities who take part in NRPS, BPS and TPS and highlight key areas where operators should focus effort to improve services.

*"The foundations of our research and influence for transport users depends on our reputation for effective management and good governance."*

Michelle Calvert, Business Services Executive

## Making Transport Focus an insight and evidence hub

### Leading thinking

We want to hold a number of events, potentially looking at innovative ways of gathering user satisfaction, measuring performance, handling complaints effectively and improving the user experience during disruption.

The findings from these seminars will be published and widely circulated to stimulate improvement and thought.

The seminars will involve representatives from across all transport modes (including, for example, air, ferries, Eurotunnel and on-demand private hire services) and other consumer industries. They will require supplementary funding from partner organisations.

### Insight work

Our *Insight Plan 2017-18* outlines our programme for this year. It will be updated during the year to reflect recently completed and new projects.

We will publish a number of reports including our ongoing tracker surveys – the NRPS, BPS and TPS and the NRUSS.

All our insight work is published and available to all on our website.

## A modern workplace for great people

We want to make Transport Focus a great place to work, with a team that is happy to work for us. We are committed to promoting the principles and practices of diversity and equality, including continuing to try to recruit the right people we need from more diverse backgrounds.

We aim to create a modern workplace where staff are supported and encouraged to make a difference for transport users. We will provide the development, training, skills, knowledge and management to allow staff to flourish.

We provide good quality offices, IT equipment, communications, policies and procedures that support our people and enable them to get on with delivering great work.

We aim to make our staff feel valued as individuals. We will try to be a flexible employer responding to individuals' needs, while respecting the organisation's overall cohesion and performance.

*"We continue to develop our communications through our website, social media and publications. Stakeholders tell us they find our reports well written, accessible and easy to read."*

Kieran Watkins  
Senior Communications Officer

### 3 Delivering the Workplan

Transport Focus is an executive non-departmental public body sponsored by the DfT. The majority of our funding comes from DfT in the form of either core year-to-year funding for a basic level of activities, or supplementary funding for additional work such as input to franchise replacements.

The drive in public sector funding is to improve and modernise services as well as boosting digital delivery – we are working hard to see how we can do this. In addition, our core funding (along with many other public sector organisations) has been significantly reduced following the 2015 Spending Review.

We are already building our income from other sources, boosting our ability to make a difference as well as striving to improve value for money for the taxpayer. For example, the BPS is currently funded equally by bus operators, local authorities and us. If you would like to discuss working with us in partnership please do get in touch. The majority of the work detailed in this Workplan is covered by DfT core funding. As we secure more funding, additional projects will be added.

Transport Focus's 'grant in aid' funding from the DfT will be £4.31 million (2016-17: £ 4.9 million) for passenger representation and £1.74 million (2016-17: £2.20 million) for strategic roads user representation.

#### Budget 2017-18

	Costs fully funded by grant in aid £000s	Costs fully funded from alternative sources £000s
Fixed pay	2794	481
Fixed overheads	731	133
Variable overheads	405	48
Total running costs	3930	662
<b>Research and other projects (net cost)</b>		
National Rail Passenger Survey	722	
Bus Passenger Survey (net cost) <sup>(1)</sup>	225	
National Road Users' Satisfaction Survey and development of the Strategic Roads User Survey	652	
Road user research and projects	250	
Passenger research and projects	272	175
Total passenger and road user research and projects	2121	175
<b>Net operating costs</b>	<b>6051</b>	<b>837</b>

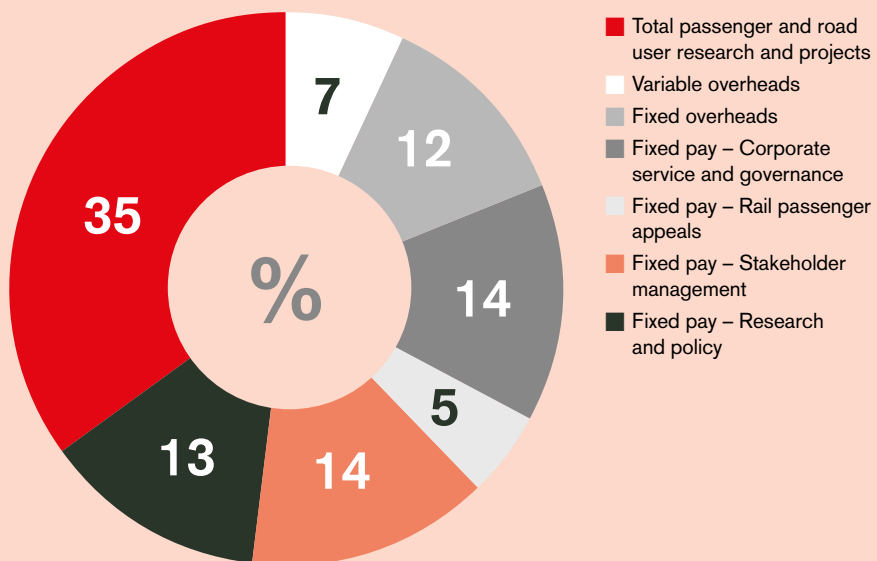
The activities funded from alternative sources in 2017-18 will generate £0.8 million of income and contribute £0.1 million to our overheads to reduce the grant in aid funding required.

<sup>(1)</sup>Stakeholders provide additional funding totalling approximately £450,000 each year to increase the coverage of the Bus Passenger Survey.

"Around a third of our annual spend goes to finding out what the passenger and road user thinks. The responses are then used to inform transport decisions."

Shahid Mohammed  
Finance Manger

## Grant in aid funded costs for 2017-18





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