



Illuminas
Enlighten. Empower.



Transpennine Route Upgrade research
Prepared for Transport Focus

July 2020

By John Connaughton – CEO
john.connaughton@illuminas.com
T: +44 (0)20 7909 0935
M: +44 (0)7946 277959



[illuminas.com](https://www.illuminas.com)



[linkedin.com/company/illuminas](https://www.linkedin.com/company/illuminas)



[@Illuminas](https://twitter.com/Illuminas)



Research background, and approach

Network Rail is preparing to enhance the Transpennine Route

Scheduled to complete in 2024, these works will deliver a faster, more frequent and more reliable service across the North. However, with these improvements comes the prospect of significant disruption for at least five years.

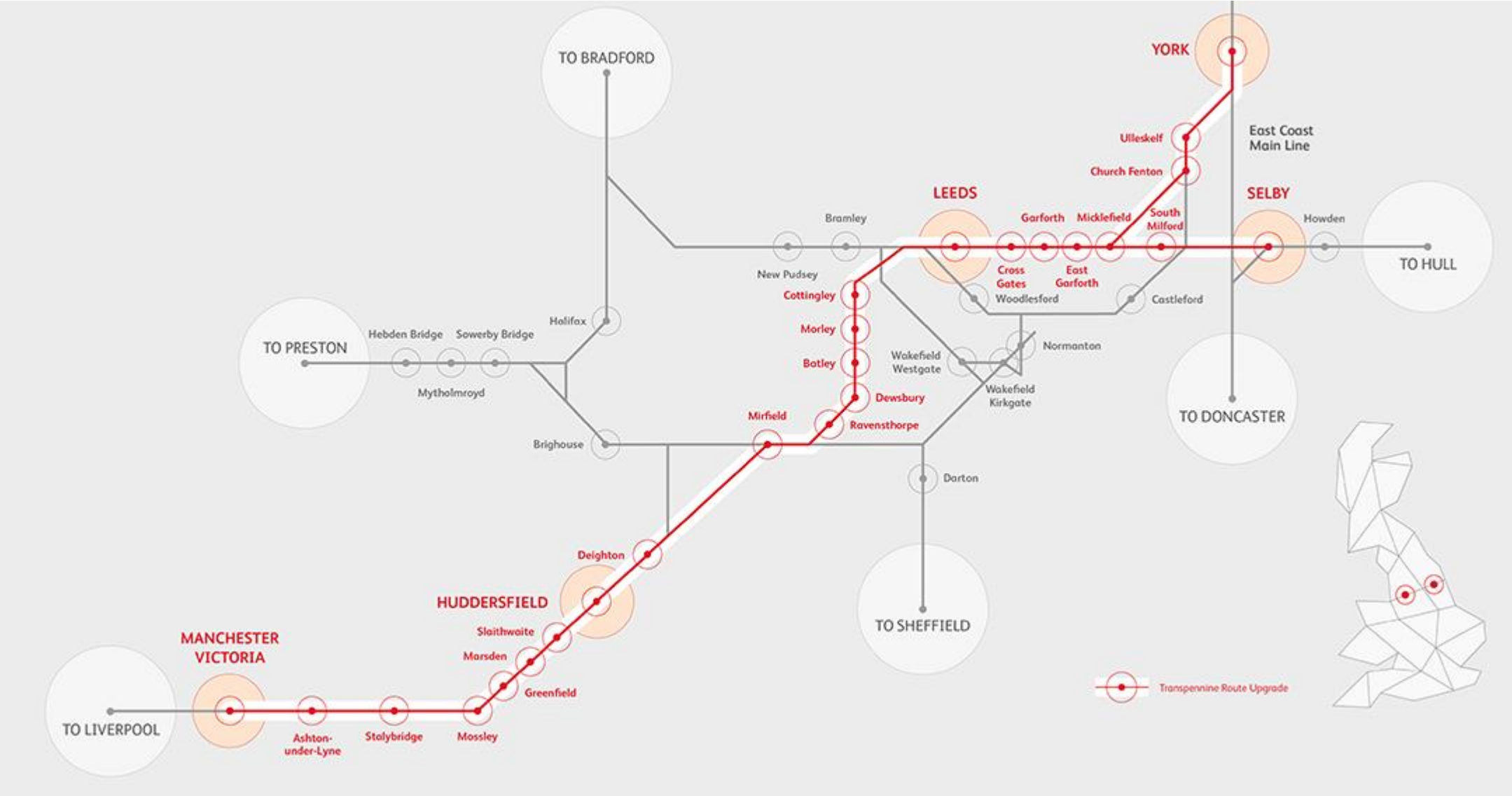
It is crucial to understand passengers' expectations around minimising disruption, and optimising communications and alternative routes, as Transport Focus has on other lines across the country.

At this stage, Transport Focus has identified a broader opportunity to explore passengers' expectations of what best practice ought to be when it comes to disruption to normal services.

As well as providing actionable insight for the future of the Transpennine Route Upgrade, this research can act as a case study for other works to learn from.



The route upgrade will directly affect the stations below



The research objectives fall into two broad themes

Identifying the best possible implementation of the upgrade

- What is the current level of satisfaction with service and performance on the Transpennine route?
- What are the hopes for future service provision?
- What is the current level of awareness of the works and the potential disruption?
- What concerns are there about the impact of the work?
- When is the best time to undertake the work?

Identifying best practice for mitigating the impact of the upgrade

- What preferences exist around alternative travel arrangements including:
 - Diverted trains on longer/slower routes
 - Provision of rail replacement services and where from
 - What can be done to improve rail replacement services
 - Maintaining a scheduled service albeit with changes of train
 - Access to alternative modes of transport
- What travel behaviours exist among passengers during disruption, and how can the upgrade facilitate and work with these?
- What communications about the works do passengers expect?
- What expectations around compensation exist?

Summary of approach



1. Focus groups

Our approach included **12 x 90-minute focus groups**.

A combination of **individual trade-off exercises** and group discussion allowed us to explore individuals' priorities and how the upgrade improvement benefits, and the disruption, are likely to be discussed among passengers.

The focus groups helped passengers think outside of their own perspective and the potential impact to their journey to talk more about broader implications of the disruption and any mitigation against it.



2. Questionnaire

During each session, passengers were tasked with completing a short questionnaire about their individual deliberations on disruption in rail.

Given that we spoke to 106 passengers, the questionnaire has provided a useful opportunity to reinforce our findings with a degree of quantification. While the data is indicative, we reached **saturation** – the point at which the main themes of the research began repeating themselves in the groups, and can therefore be confident that even 1,000 more interviews would not alter the overall story of the research.



3. Face-to-face depth interviews

10 depth interviews were conducted with vulnerable passengers.

Face-to-face interviews provided the optimum environment for vulnerable passengers to discuss in-depth, their additional needs and requirements in terms of alternatives offered during the upgrade - are they accessible and feasible?

- A total of 106 individuals participated in the research.
- Fieldwork was conducted between 31st July and 15th August, 2019.

Sample structure: ensured coverage of predicted disruption and potentially congested alternative routes

12 Focus groups

Location	Journey length	Journey purpose
Huddersfield	Longer	Discretionary
	Shorter	Discretionary
	Longer	Non-discretionary
	Shorter	Non-discretionary
	Longer	Discretionary
	Shorter	Non-discretionary
Leeds	Longer	Discretionary
	Shorter	Discretionary
	Longer	Non-discretionary
	Shorter	Non-discretionary
Manchester	Longer	Discretionary
	Shorter	Non-discretionary

10 In-depth interviews with vulnerable passengers

- Spread of locations
- Spread of journey length
- Spread of disabilities, both visible and hidden

Passengers were recruited using a spread of start and end points along the journey to ensure that as much of the affected route is represented as possible. This allowed us to provide insight into how feasible alternative routes feel, as well as the perceived impact of the congestion for any additional journeys they may take via those routes

For all:

- All travel on Transpennine Express or Northern routes subject to potential future disruption
- Spread of age, gender, socioeconomic group
- Representation of inter-city travel

Minimum 3 per group to have additional experience of a projected ‘alternative’ route

Discretionary: Less regular journeys made with an element of perceived choice about timings and mode (e.g. shopping, leisure).

Non-discretionary: More regular journeys that feel more essential for the passenger and more restricted in terms of modes felt to be available.

Within Discretionary groups

- Spread of frequent (3+ times per week) and infrequent (less than once a week, more than once per month) passengers

Within Non-Discretionary groups

- Minimum 2 season-ticket holders
- All to be frequent passengers (minimum 3 journeys per week)

Contents

- **Experiences of using the Transpennine Route:** what do passengers think about the route?
- **Awareness of the Upgrade:** what do passengers know about the future of the route? What is their initial reaction to it?
- **Delivering the Upgrade:** what is the general mindset that informs passenger preferences?
- **Scheduling of the works:** how should the upgrade be scheduled? What are the ‘least worst’ options?
- **Mitigating the disruption:** what alternative services should be put in place, how should they run and where?
- **Communicating the Upgrade:** what do passengers need to know, and how should they be informed?



Experience of using the Transpennine route

Users do not see journeys on the Transpennine route as a premium service, but are reasonably satisfied nonetheless

There is a general sense among passengers that the Transpennine route is satisfactory but not exceptional

- Services on the Northern and Transpennine Express services are not seen as premium. There is little to differentiate it from alternative modes of transport beyond pure cost and journey time considerations.
- While most individual journeys are satisfactory, some are frustrated that services in the south of England appear much more reliable, frequent and modern overall.
- Again, there is strong recognition that commuters are the most adversely affected by this apparent investment gap.
- Some, particularly discretionary passengers, are more positive about the route, appreciating the scenery, links to local attractions and children finding it enjoyable. However, airport journeys are a higher-stakes leisure journey with less flexibility and are therefore held to a higher standard of reliability.
- Likewise, the train is viewed positively compared long road journeys such as those on the M62, which is seen (at a minimum) as equally unreliable.

Well it just feels like a train you know? I've just got used to 'ten minutes to Dewsbury...ten minutes to Leeds'...Just doing the route so often.

Vulnerable Passenger, Hearing

We use the train because it's cheaper than driving. If it's going to get to the point where it's equal you might as well drive.

Huddersfield, Commuter

Views about journeys on Transpennine Route varied according to journey purpose

Commuters

A distress purchase without a sense of modal choice.

I treat the timetable as inspiration only – and then when it turns up it's so crowded, can I get on at all? So I have to wait for the next one and hope it's not late. That's not a one-off, that's every day.

Leeds, Commuter

I find it really hit and miss. It's not consistent, the cleanliness or being able to get a seat. It can be really busy.

Manchester, Commuter

Leisure Users

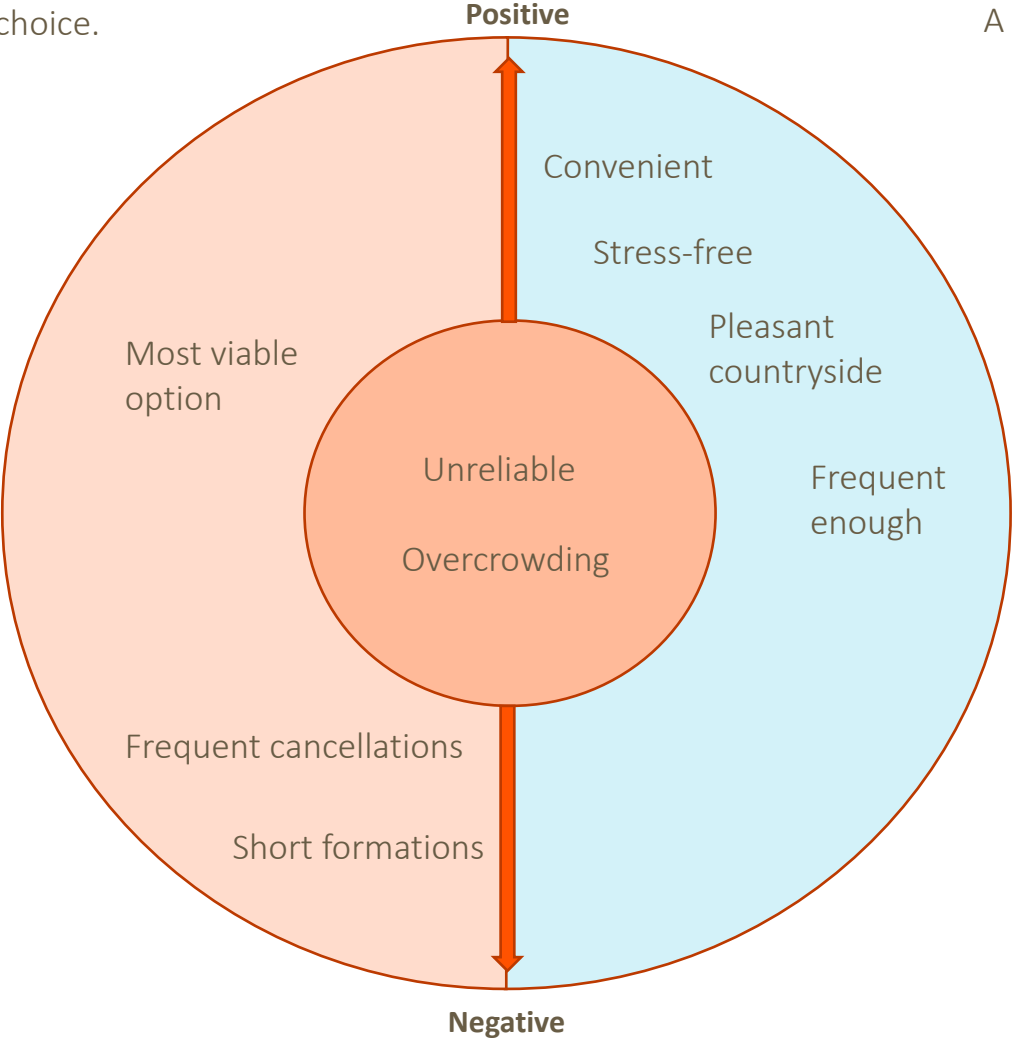
A more conscious choice with clear benefits.

I like the certainty that 99% of the time I can catch the train and I'm at Leeds in an hour. With the car, maybe, maybe not.

Manchester, Leisure

Once it gets going it's quite fast. And it runs regular enough, to a certain extent. Once it is going, it's fine.

Huddersfield, Leisure





Awareness of the
upgrade

What do passengers know?

- Awareness of any investment in the Transpennine route is low.
- There is a general sense that *something* is upcoming, but this is often understood within the context of a broader political discourse around investing in the north.
- There is limited knowledge about specific, upcoming projects.
- However, there is a consensus that rail in the north is underfunded.
- Awareness of Northern Powerhouse Rail is modest – particularly given that it was announced a week prior to the research taking place.
- A small number of passengers were aware of the planned introduction of new trains, and that these were delayed.

The Transpennine Route Upgrade will therefore be introduced within a context of limited expectations and sparse awareness.



On first introduction, the route upgrade was met with both excitement and concern

Excitement

More carriages, travelling in comfort, more seats...sounds great. I can't see why there would be drawbacks except if the prices go up.

Vulnerable Passenger, Hearing

That's an impressive improvement, really

Manchester, Leisure

A draft narrative of the upgrade to stimulate discussion

People in the north deserve better railways.

By introducing new trains and upgrading the Transpennine Route, the rail industry intends to deliver trains that turn up on time and get people where they need to go in comfort.

Rebuilding and improving the Victorian infrastructure between Manchester, Leeds and York will provide faster, more reliable and more comfortable trains.

Improvements will be introduced incrementally and by the time the work is finished, the number of seats going across the Pennines every hour will have more than trebled.

It will also provide better links between the north's most important economic centres and the rural and sub-urban stations by reducing journey times and increasing the number of trains available every hour – improving connections for businesses, creating jobs and supporting economic growth.

Working on ageing infrastructure in hard-to-reach rural locations will be a major engineering challenge. The Transpennine line includes 25 stations, eight tunnels and 15 viaducts and dips under dozens of bridges.

It means allowing a busy stretch of railway to “live and breathe, while carrying out major surgery at the same time.”

Work of this scale can't be delivered without sometimes closing the line, changing train times and occasionally asking passengers to use rail replacement buses.

But with demand for rail services outstripping supply and an already congested railway, not improving the Transpennine line is not an option.

The industry will do everything it can to keep disruption to a minimum and to provide clear and timely communication throughout the work

Concern

It sounds like they're making excuses already. They're saying it's going to be hassle and it's hard in rural areas but the Victorians seemed to manage...

Leeds, Commuter

I'd hate to think we were going to lose the lovely tunnels and routes and scenery you get because of these upgrades...

Huddersfield, Leisure

“Please write down what you think will be the key benefits of the Transpennine Route Upgrade to you personally.”

Passengers were asked – before seeing any specific details – what they imagined and expected the benefits of the upgrade would be:

More comfort, shorter journeys and benefits to the northern economy.

*Trains with enough
seats for all passengers,
saving time.*

A quicker service with the ability to get a seat – I won't have to worry about overcrowding.



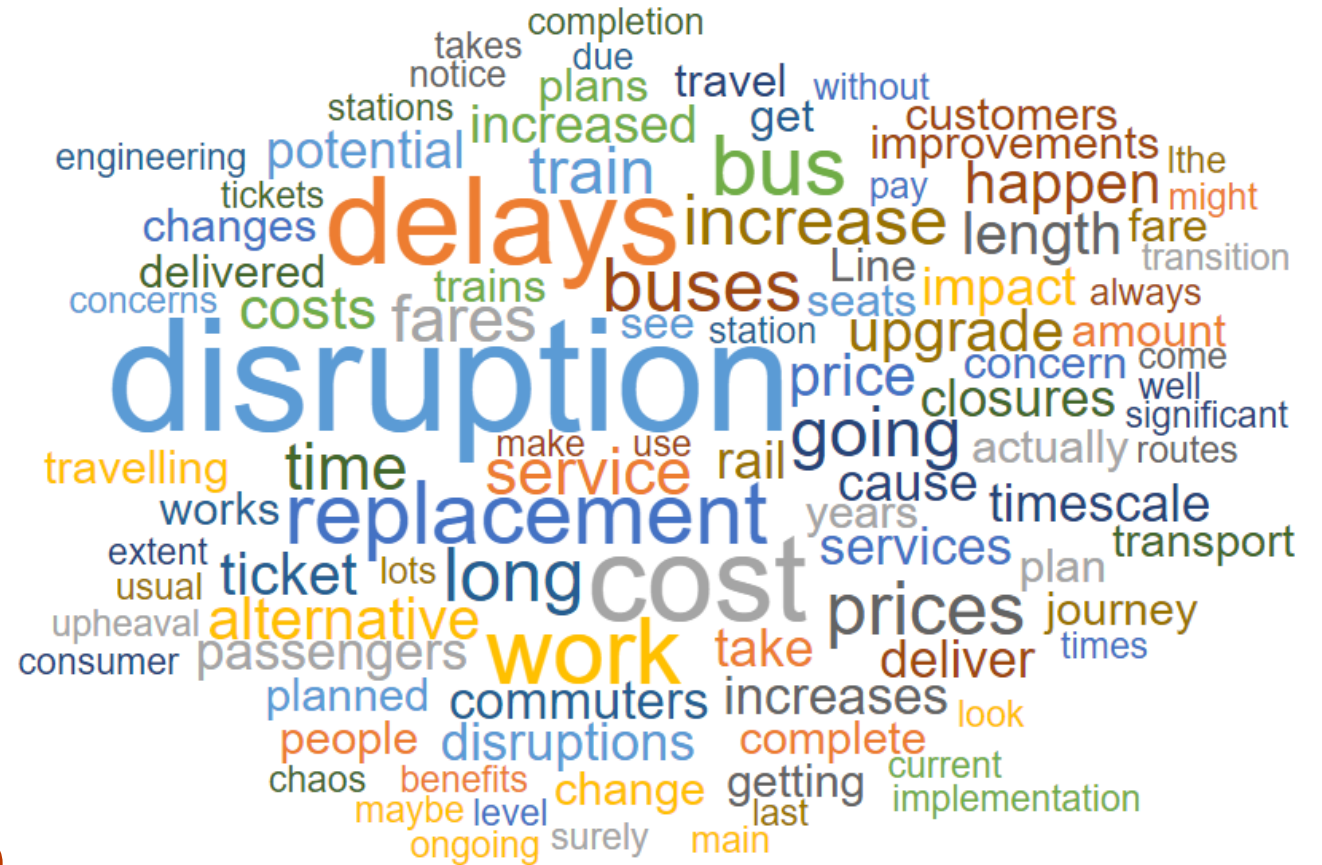
“Please write down any significant concerns you have about the plans for the Transpennine Route Upgrade at this stage”

Likewise, passengers were asked what spontaneous fears or concerns they had about the upgrade:

Disruption over a long period of time – increased costs.

Getting alternative transport right – replacement buses, communications and just-in-time information.

*Cost? Will that be passed down to the customer?
And the initial disruption...*

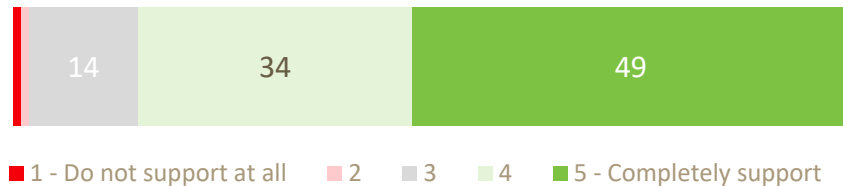


In principle, however, support for the Transpennine Route Upgrade is strong

- The Transpennine Route Upgrade, once understood, is seen as long overdue.
- Passengers accept the need to upgrade existing routes and after some thought, are willing to experience disruption for long-term gain.
- Even when passengers were made aware of Northern Powerhouse Rail, the Transpennine Route Upgrade was seen as highly necessary. Improvements are needed *now*, and passengers do not want to wait.
- Passengers see the upgrade as a **signifier** of investment in the north.
 - In addition, passengers recognise that robust rail infrastructure is necessary for the economic development of their local area.

The upgrade is seen to represent more than just an improvement to passenger journeys: there are hopes for the upgrade to enhance the region as a whole.

On balance, given everything you have heard, do you support the Transpennine Route Upgrade? (%)



84% of respondents supported the Transpennine Route Upgrade in principle

Passengers were asked to rate their overall support for the upgrade based on a brief summary of its rationale and benefits.

Capacity and reliability are the most engaging benefits of the upgrade

- Passengers do not want to see a faster service that is still unreliable. Journey time may become more of a priority when the overall reliability of the route increases after the upgrade, however.
- When passengers are made aware of the potential increase in seating by December 2019, most still feel that the additional capacity afforded by the upgrade is worthwhile.
- Discomfort and overcrowding are the most strongly-felt aspects of the service, ahead of punctuality. This may be exacerbated when airport passengers with large amounts of luggage board the service.
- Reliability in this context is taken to mean a combination of frequency, punctuality, and getting a seat.
 - Most hope that the route will be able to support more trains in a given period and therefore move more passengers.
- There is some expectation that the route upgrade will allow for a more ‘modern’ service, closer in line with services in London.

You'd get a better service. Your trains would be more reliable: they turn up on time, they get you where you're going and there's more frequency so that if you miss one, you wait another ten minutes and there's another one. That's the ideal.

Manchester, Commuter

I want to get a seat, every time.

Manchester, Leisure

If someone said 'what's your number one gripe with train travel' I'd say not enough seats. Usually you think 'where am I going to stand' not 'where am I going to sit'.

Huddersfield, Leisure

Indicative benefits shown to passengers for the purpose of discussion.

Existing capacity

845

Seats Per Hour (MAN-LDS).

This figure lays into sharp relief the existing lack of capacity and helps to lend a sense of urgency to the upgrade.

Capacity at
December 2019

2064

Seats Per Hour (MAN-LDS).

It was made clear to passengers that this figure could be achieved purely through the introduction of new trains. However, the 3120 figure was still seen as very appealing in this context.

TRU ideal outputs

3120

Seats Per Hour (MAN-LDS).

This figure was very attractive and appeared to promise a more 'London-like' service in terms of moving passengers efficiently – it implies both new trains and a more frequent service.

What do passengers worry about initially?

When first introduced to a summary of the upgrade, passengers worried about an overall sense of 'chaos' stemming from the work

- The May 2018 timetable changes still loom large in passengers' minds, leading many to assume that an upgrade of this scale will lead to equal or greater disruption.
- Trust in rail is low and some doubt whether benefits will be delivered to the promised level.
- Passengers **expect** that any alternative arrangements will be unreliable.

There is a strong, spontaneous assumption that costs will be met through fare increases

- The scale of the work and the scope of the benefits lead many to assume that fares could as much as double.
- Some reassurances around where the funding comes from will be a necessary first step in communicating the upgrade.

If the timetable changes caused that level of chaos then I dread to think what this will be.

Leeds, Commuter

Up here they've stopped telling you if the trains are late – if I have a connecting train to London that's a problem.

Vulnerable Passenger, Chronic digestive condition



Delivering the upgrade

Passengers adhered to strong general principles for how the upgrade should proceed

Maintain a balance

- Passengers want to have the work complete as soon possible, but not if more intensive closures lead the railway to go below a ‘bare minimum’ standard.

Prioritise commuters

- Peak hours are seen as the most important operating hours for the railway, and commuters are seen as having the most important reason to travel.

Capacity first, consistency second

- Passengers want to see the number of available seats maximised throughout, even if this means that the service would run in a less predictable pattern.
 - Passengers do not want to see resources spread more thinly in the interest of a consistent timetable.

Tangible improvements

- If possible, each intensive closure should yield a measurable, significant improvement to the line.
 - Doing so would enhance trust and reassure passengers.

Be punctual

- Many instinctively assumed that the upgrade would automatically entail a drop in punctuality and reliability.
 - A great deal of frustration can be avoided if rail services adhere to the schedule set and by planning ahead to deliver a reliable service.

There was a strong expectation that those in charge of the upgrade will plan based on passenger data and analysis

- Some were unsure why they were being asked to offer their opinion on the scheduling of the works, believing that Network Rail (although they did not always know precisely who was 'in charge') would be able to analyse passenger behaviour and devise a scheme that affects as few people as possible.
- However, not all passengers wanted the upgrades to be planned based on statistics alone.
 - Softer factors emerged which the railway should take into account (comfort, fairness).
 - Many wanted to avoid closures in the winter, when one can be waiting in the cold.
- Fairness was crucial. Passengers wanted to see the impact of the upgrades spread (relatively) evenly across all users, but protecting livelihoods is seen as more important than safeguarding leisure journeys.
- If Network Rail were to 'show its workings' and explain how the disruption has been mitigated (by impacting the fewest people), it would encourage trust in the programme.

*Well obviously you've got to think strategically about what you need to do to get the work done. **People won't complain** if there's a good backup and an investment in a good bus service.*

Vulnerable Passenger, Chronic Digestion

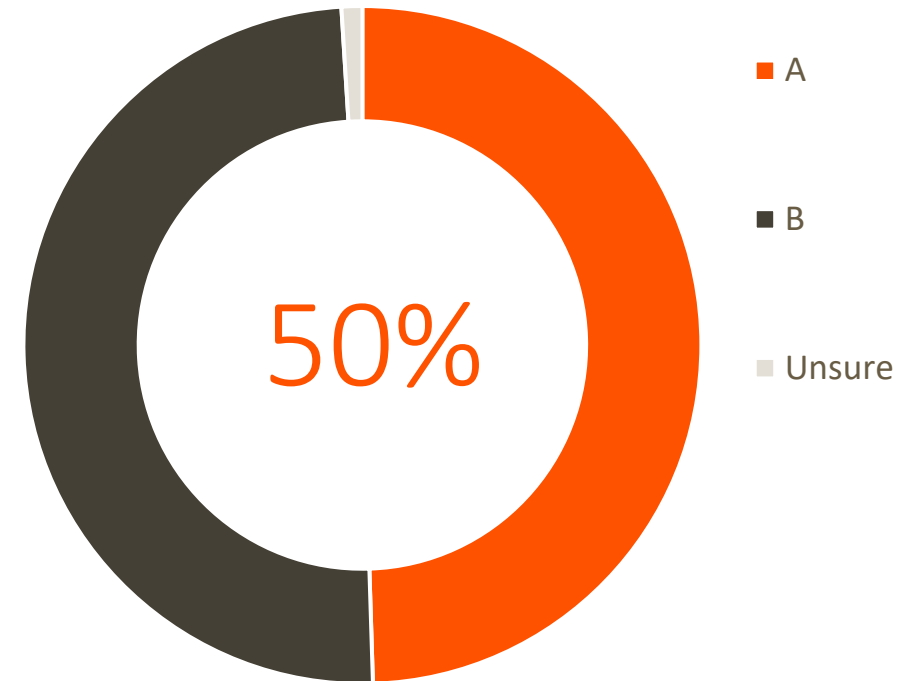
*They must have data so they can see what the peak times of year are or at any given month...How about if they just said 'we're closing this time because less people use it this time of year?'. **A lot of people would accept that as making sense.***

Manchester, Leisure

Passengers are divided on how best to undertake the work – clearly it's impossible to please everyone!

On balance, do you think the railway should...

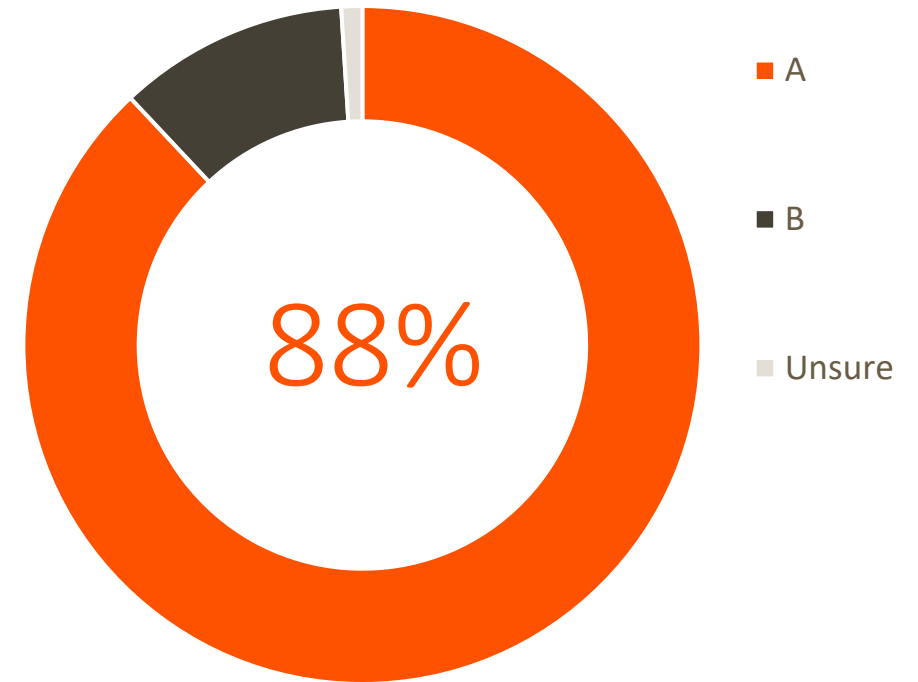
- A) Get the work done as quickly as possible with several multiple-week closures?
- B) Take longer and do more work at weekends and overnight?



Overwhelmingly, passengers preferred a plan which put the needs of commuters and business travellers first

On balance, do you think the railway should...

- A) Minimise disruption to commuters and business travellers with as few Monday to Friday daytime closures as possible?
- B) Do more of the work Monday-Friday in the daytime so there are fewer weekend closures?

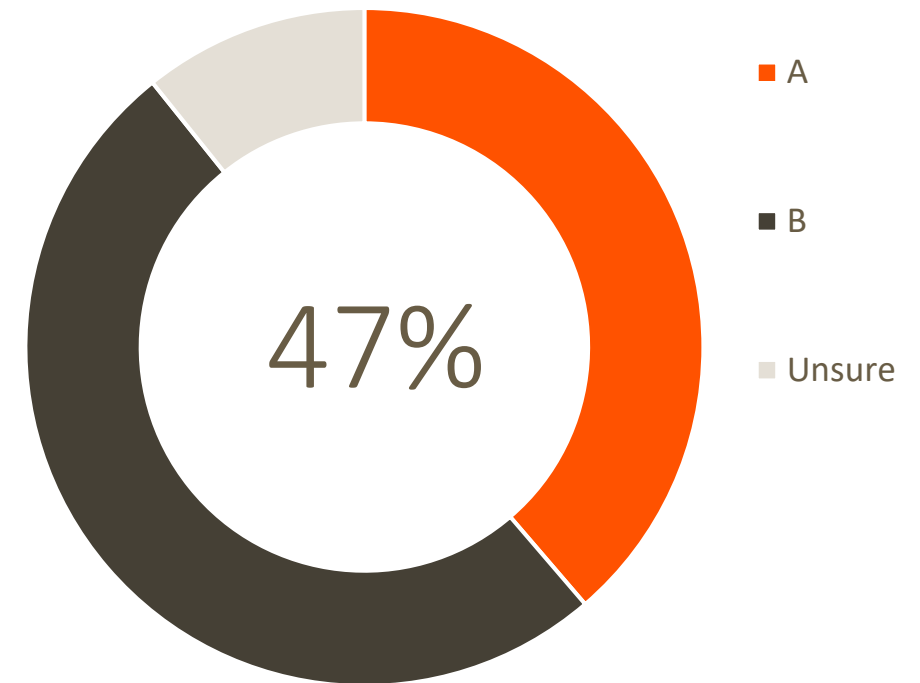


Passengers concluded that longer-distance journeys were more likely to be leisure journeys, and applied the same principles as the previous question

On balance, do you think the railway should prioritise...

A) Passengers making longer-distance journeys

B) Passengers making local journeys into Manchester/Huddersfield/Leeds



Passengers making all types of journey feel that commuters' needs should be prioritised

- Many argued that if they are persistently made late for work, commuters' livelihoods could be threatened.
- There is a strong sense among leisure users that commuters experience the worst of rail disruption.
- Several discretionary users were prepared to change their leisure destinations based on the situation on the railway.
 - Others were prepared to abandon nonessential journeys altogether.
- While they stress that there should be some equity in the way passengers are affected, leisure users concede that their disruption is more of an annoyance than a source of harm.

It's about the frequency of it – you don't want to be inconvenienced every day compared to say monthly.

Huddersfield, Commuter

I mean, there's a decent shopping centre in Huddersfield anyway... I don't have to go to Leeds.

Vulnerable Passenger, Arthritis (Leisure)

Crazy – I'm just glad I don't travel for work because that would get me worked up, if you're relying on the train and it's going to get all that disruption.

Manchester, Leisure

Vulnerable passengers tended to think about these issues in the same way as passengers who were not vulnerable

In line with other passengers, those with long-term health conditions wanted seating and reliability to be prioritised

- For these passengers, however, the need for a seat is more pressing.
 - While some are comfortable to use priority seating, many with what they consider ‘milder’ conditions would not use it.
- Minimising on-platform (or bus stop) waiting is another major priority, particularly in winter when some long-term health conditions may be aggravated.
- Reassurances around the punctuality of trains (regardless of frequency) will be essential to help vulnerable passengers plan their journeys and avoid unnecessary waits.

Case Study: Vulnerable Passenger (Fibromyalgia)

This passenger experiences body aches, loss of hearing, headaches and fatigue. These symptoms are unpredictable, meaning her need for a seat can vary day-by-day. Her priorities for the Transpennine Route Upgrade centre on increased capacity and the *option* of a seat, as well as making sure that she does not have to wait for too long. She uses journey planning apps to help her plan ahead and would use these to get updates about disruption.

Ever since the surgery on my back I just find it so much harder, especially if I have to stand and if I have to go at a busy time.

Vulnerable Passenger, Mobility



Scheduling of the works

Initially, passengers were alarmed by the potential schedule of closures, but became more understanding

- At first, the six-year duration of the work was worrying. However, **the duration implied large-scale changes**, which signified a strong commitment to improving the passenger experience.
- Passengers were reassured by the honesty and simplicity of how the possible schedule was laid out.
- **However, many passengers felt less qualified to judge on the specific details**, with most assuming that sensible evaluations will already have been made by the railway. When forced to make a choice, they will do so, but ultimately feel the railway is better placed to make such a judgment.

The example below was shown to passengers for the purposes of research. While it may not be an accurate representation of the final programme, it was sufficient as a concise summary and discussion point.

- The rail industry currently expects that the Transpennine Route Upgrade will take six years to complete.
- In any one year the work might necessitate something like:
 - One period where part of the line is **closed completely** for four weeks
 - Perhaps 15 **weekends** where part of the line is closed completely (including some bank holiday weekends)
 - Perhaps 10 weeks where there are **no late evening services** after about 22:00 and no early morning services before 06:00

I would have expected that really – they've got to do it some way or another.

Manchester, Leisure

I'm surprised it's going to take six years... That's ages. It would be chaos!

Huddersfield, Leisure

When given more detail, the response does not necessarily change significantly

Seeing specific information about how the closures may affect their route may cause frustration due to their individual circumstances.

However, this information does not create objections to the overall plan. Passengers recognise that a certain amount of disruption is necessary to complete the route and **expected** that this would affect their journey in some way or another.

Again, this example served as a helpful talking point and invited passengers to consider specific (if hypothetical) closures and how they might impact them in the real world.

Huddersfield to Stalybridge

- One 30-day closure in year one together with a 16-day closure before or after that, and another 16-day closure in year two
- 26 weekend closures in year one (maybe not until 2024), 26 in year two and 14 in year 3 (some being 3-day closures over a Bank Holiday)
- Withdrawal of late evening/early morning trains over perhaps ten weeks for the full six years

Huddersfield to Brighouse/Mirfield

- One 11-day closure in year one together with a second in year two, and two 30-day closures in years three and five
- 1 weekend closure in year one (maybe not until 2022), 6 in year two and 7 in year three (some being 3-day closures over a Bank Holiday, including Christmas/New Year)
- Withdrawal of late evening/early morning trains over perhaps ten to twenty weeks for the full six years

Ravensthorpe to Leeds

- One 16-day closure in year one together with a 5-day closure in year two and closures over Christmas and New Year in a couple of years
- 7 weekend closures in year one, 5 in year two, 24 in year three and 4 in year four (some being 3-day closures over a BH)
- Withdrawal of late evening/early morning trains over perhaps ten weeks for the full six years

I get it but my only problem is that everyone would get off the train and we all try to get on the local bus? If I couldn't get on that bus I'd be well annoyed.

Manchester, Leisure

It's just an awful lot, isn't it? I travel all over and that [Ravensthorpe to Leeds] link is quite important to me. Looking at 24 weekend closures, that is an awful lot.

Huddersfield, Commuter

Well I use Brighouse to get to London so maybe I wouldn't be able to do that.

Vulnerable Passenger, Fibromyalgia

I know there's buses every 15 minutes from Brighouse to Huddersfield, so I'd just think, right, I'm not using the train.

Huddersfield, Leisure

Summer closures were significantly preferred to winter closures

- There is a strong perception that rail is less resilient and reliable during the winter.
 - As such, it was seen as important to keep passengers moving as much as possible.
- Those with disabilities pointed out that waiting on the platform in cold weather was harmful to their health.
- Others pointed out that the days are shorter in winter, making disruption more unpleasant and less safe.
- Ideally intensive closures would take in August, when many people were felt to take their holiday. Likewise, there was some sense that roads (and the rail network) were quieter during school holidays and were therefore suitable times to undertake the work.

The thing about those big old stations in the North is, they are very cold in the winter. And with my condition, being stuck on a very cold platform for ages makes me feel quite ill.

Vulnerable Passenger, Chronic Digestion

Do it when there's lighter mornings and lighter evenings.

Leeds, Commuter

Just imagine it's snowing heavily....waiting ages for a bus or something.

Huddersfield, Commuter

I said there was major disruption years ago with the replacement buses. It was in the winter. You couldn't do the journey from Huddersfield to Leeds in less than two hours, each way. It made for a real long day.

Leeds, Commuter



Evening closures are preferred to weekday daytime closures, but concerns remain

Late evening closures left a few passengers worried that they would be 'stranded' if they missed the last train home

- Several passengers had personal experience of this and having to pay considerable sums on taxi fares.
- Those with disabilities felt considerably less safe at night, and argued that the service should, as far as possible, remain uninterrupted then.
- Others pointed out that the train was especially useful at night when people have evening plans, and have consumed alcohol and cannot therefore use a car.
- Ultimately, however, evening closures were significantly preferable to daytime closures during the week.

Weekend closures, on the other hand, were seen as more acceptable

- Over the course of a weekend, people had a greater degree of choice over where they go, how they get there, and indeed whether to travel at all.
- Many would prefer to have more weekend closures in the interest of avoiding evening ones.

With evenings closed, and you miss the last train, that last train is the difference between you and £35 on a taxi.

Leeds, Commuter

Late evening closures are probably more liveable with as long as there's replacement buses, but if something's closed for four weeks and it's your daily commute, it's harder to swallow.

Huddersfield, Commuter

What about all those poor workers working in the dark, overnight?

Manchester, Leisure

Most public holidays are relatively acceptable times for line closures

However, when shown 'real world' examples of closures, most felt that the trains should operate around Christmas

Closures on bank holidays were (reluctantly) seen as acceptable

- While there is some frustration around the idea of three days of closures, there was no inherent sense that bank holidays are a particularly difficult time for closures to take place in.

However, closures around Christmas and New Year would be frustrating

- Visiting family around Christmas was considered a higher-importance leisure trip compared to those more spontaneous journeys taken around other public holidays.
- As discussed, concerns around Christmas closures are compounded by an overall dislike of winter closures. Some are also concerned that adverse weather could delay the works.

Christmas and the summer holidays would be okay for commuting but not the leisure travellers.

Leeds, Leisure

Surely there's a peak of passengers in December?

Manchester, Leisure



Mitigating the disruption

Passengers held to strong principles for providing alternative routes and road replacement services

Trains are preferable to any replacement service

- Trains had a certain cachet as an overall ‘nicer’ mode of transport.
- In addition, many felt that if one has paid for a train ticket, they ought to be able to travel by train.

*I take a long time to get up and down steps so having things like **escalators and lifts** are important. When it's Huddersfield or Leeds [stations] I know what I'm doing.*

Vulnerable Passenger, Arthritis

One through-journey is preferable to interchanging

- The overall ‘hassle’ of interchanging means most passengers would prefer to avoid this.
- Adding an interchange to the journey would add uncertainty and anxiety for passengers unfamiliar with the route.

Coaches are more appropriate than buses

- Coaches are seen as a higher-capacity mode with amenities such as toilets and air conditioning.
- They are seen as more appropriate for long-distance travel in particular.

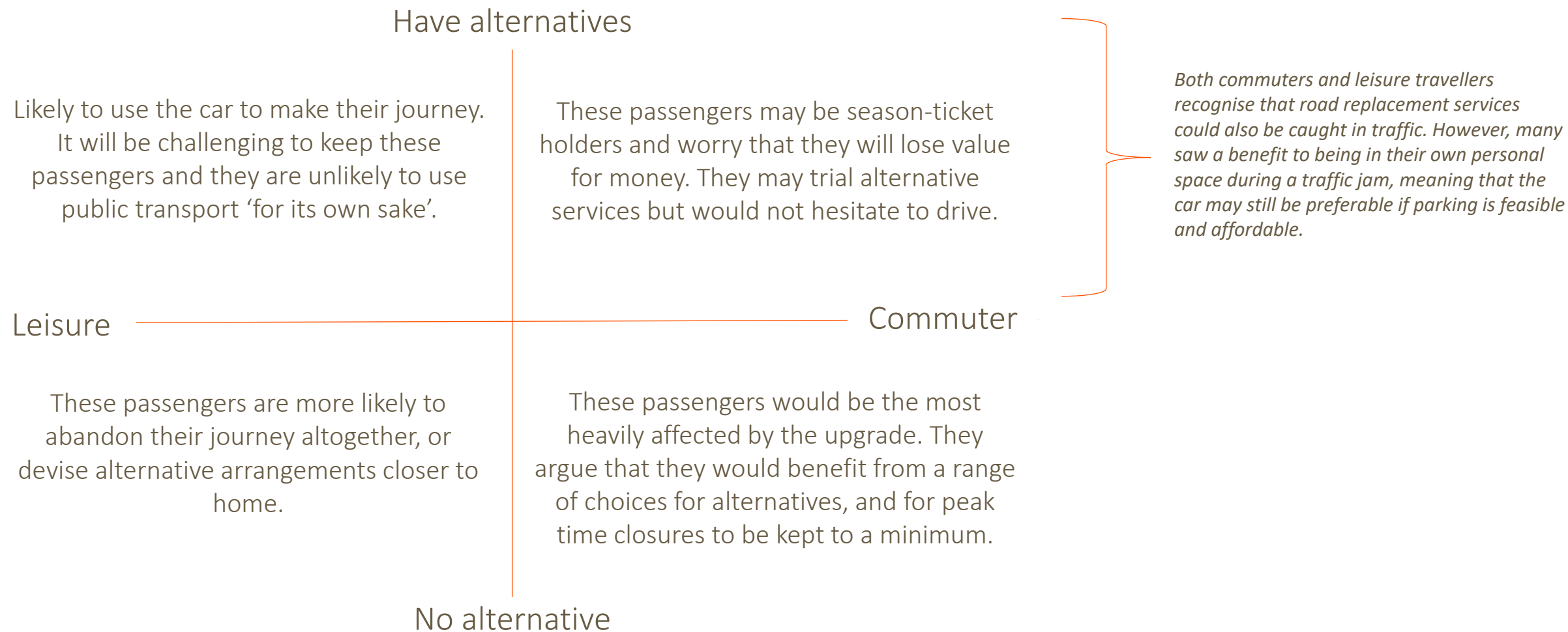
Passengers are not interested in the detail

- While passengers have doubts about the rail sector's ability to deliver in practice, they have confidence in its ability to plan to the correct principles.
- Expectations are low. Many assumed in reality, they would either have a bus, or nothing at all.

There is a caveat: Provided I could get a seat on the train, I'd prefer the train. Even if it's slower. It's more comfortable, it's easier, and I've got this perception that it's more reliable.

Huddersfield, Commuter

Likely behaviour during the disruption is heavily dependent on journey purpose and whether passengers have other options



Likely behaviour during the disruption is heavily dependent on journey purpose and whether passengers have other options



When considering rail replacement services or alternative rail routes, many were concerned that local residents would 'lose out' on their existing services

- As a general principle, those living along diversionary routes should not have a worse service as a result of works being undertaken on the Transpennine Route.
- While express services between the most 'important' commuter hubs would benefit commuters, many settled on the compromise of having rural (scheduled) bus services take local passengers to a 'core' station along the line of their journey while removing some, but not all, stops along the route.
- But, where rural bus services are seen as unable to provide a satisfactory service, diverted trains or road replacement services should continue to stop in these locations to maintain a minimum standard of travel

“One hypothetical option would be to alter service patterns for existing services on the alternative routes (for example on the Calder Valley or on the route via Wakefield), with fewer ‘stopping’ services to allow for more ‘express’ services.”

Local buses to the station would be fine as long as it's all on time!

Huddersfield, Leisure

But would this impact on people who do use the Manchester tram?

Huddersfield, Leisure

I'd have one an hour that was slow and the rest be express. You tend to avoid the trains that stop at every one.

Vulnerable Passenger, Chronic Digestion

But they said that their aim was to include the rural stations...The whole point was to help try and reach these people.

Vulnerable Passenger, Fibromyalgia (Huddersfield)

Longer, diversionary train routes were acceptable providing trains keep to time

Adding more carriages to the stopping service was felt to balance the needs of local people with the need to meet higher demand

- Naturally, in an ideal world the diverted route would have a higher capacity, express-type service in addition to the local stopping service.
 - Many are uneasy about the prospect of all existing services becoming express and missing out the stops they are intended to serve.
- Northern and Transpennine Express trains are often seen as low-capacity and doubling the number of carriages was therefore welcomed.
 - There was some suggestion that the standard of Transpennine Express trains was higher than Northern, which was noted as still operating Pacer trains in the region.

Many would accept an increase in journey time provided they can plan around this increase

- Passengers tended to think about journey time in terms of proportional increases. Seeing their journey time 'triple' created more frustration even if the absolute journey time was low.
- The length of the journey by car is usually considered the benchmark for making the train journey attractive by comparison.

Again, these timings were indicative to stimulate discussion

Route	Journey time via diversion	Journey time now
Manchester to York via Sheffield	1 hour 40 mins	1 hr 15mins
Manchester to Leeds via Calder Valley	1 hour 30 mins	55 mins
Huddersfield to Leeds via Bradford	1 hour	20 mins
Huddersfield to Leeds via Wakefield	45mins	20 mins

It's just about acceptable. But twenty minutes going up to an hour via Bradford is really off-putting.

Huddersfield, Commuter

If you knew the bus left at 10 on the dot, no matter who's on it, then it will be a better service.

Leeds, Commuter

There is a preference for a rail replacement coach over a bus

However, passengers have some reservations which will need to be overcome before the coach is seen as a viable alternative to the train

- **A coach is seen as the least bad option.** Coaches are seen as having higher capacity than the bus, and the availability of toilets is helpful.
- Some argue that the coach is more appropriate for long-distance travel – without the need to interchange – and that buses could be used for shorter journeys.
- However, coaches and buses alike can suffer from a certain **stigma** as being stifling, uncomfortable and slow. The challenge will be to position them as a **pragmatic** way to travel given the circumstances.
- Passengers expect that appropriate provisions will be made for those with disabilities on all replacement services.

It's probably needed, coach, just for the amount of people. The coach would be the first option, surely.

Manchester, Leisure

People would be cheesed off if they pay for a train ticket and they end up on a coach that takes twice as long.

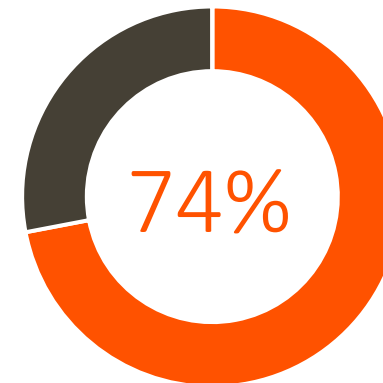
Huddersfield, Leisure

Case Study: Vulnerable Passenger (Arthritis)

This passenger prefers buses to coaches from an accessibility standpoint. The large step from pavement to coach is usually too high for her to negotiate, and finds that coach drivers can be unhelpful compared to bus drivers. Priority seating on buses, as well as the variety of different seating arrangements, allows her to stretch her legs while sitting, and meets her needs considerably more effectively than a coach.

If the line were closed between Huddersfield and Stalybridge would you prefer...

- A) A bus and then a train
- B) **A coach**



For road services, the main objective is to avoid having to interchange

Interchanging, even once, creates a greater degree of uncertainty, particularly for commuters

- For many, their preference would be to get on a single mode of transport and not have to worry about planning their next step, even if the journey was slower overall.

The prospect of interchanging can feel daunting, given previous experiences of rail replacement services and an overall lack of trust regarding the upgrade's implementation

- It may well be that as communications and reassurances filter through, the preference for a **demonstrably well-organised** interchange could increase. The prospect of two interchanges effectively doubled passengers' concerns about the risk of additional delay. Given a choice, they would favour a single interchange to get to their destination.

One possible exception here is interchanging with public transport networks in Manchester and Leeds, where bus and tram options are seen as sufficiently frequent to facilitate a smooth transition from road replacement services

Case Study: Vulnerable Passenger (Congenital hearing loss)

This passenger works as an events manager and is regularly required to take a car for work purposes. As such, this passenger would have very little objection to continuing to use her car for work purposes in the event of a line closure.

However, her partner lives in Manchester and she is therefore very comfortable with the Metrolink tram – unlike most passengers, therefore, the prospect of interchanging in order to get to Manchester was not particularly problematic.

She feels that the Transpennine Route Upgrade has to make sure that it tailors its marketing to individual age groups, particularly the elderly who are not on social media.

If you're on a coach, at least you're on your way.

Huddersfield, Commuter

You have to account for everybody getting off the bus to go through the train station, do the turnstile, there's rushing, shoving...

Huddersfield, Leisure

Well my daughter lives in Manchester and she has the wonderful tram, which is level, so I don't have to have a second thought about getting on or off.

Huddersfield, Leisure

Road replacement services should follow the route of the closed train service

Most passengers felt that the stations along the Transpennine route were already the most important (and accessible) areas in their given locations, and so there was no perceived need to alter the route taken. Major stations were taken to be logical and well-known starting points for alternative road services to begin.

Ideally, however, passengers would have the option of a stopping replacement road service and an express one, in much the same way as the current train service operates.

As with many trade-offs on rail, passengers are unwilling to choose just one option and the ideal outcome is a wealth of **choice**.

If you're on a leisure trip stopping would be fine but if you're in a rush and you're stopping at the station you just get more and more infuriated.

Manchester, Leisure

It's all the people that would have to wait outside the station for the buses to turn up – all the human traffic.

Huddersfield, Leisure

Compensation would be an appropriate way of mitigating the impact of the upgrade

- Compensation was seen as a helpful way of recognising and rewarding **loyalty** to the service.
- Compensating season ticket holders, including those holding M-Cards, **irrespective of whether the upgrade goes to plan or not**, was important, given their heavy investment and long-term commitment to using the route.
- There was a general expectation that replacement road services would cost less than a train.
 - Likewise, compensation for late-running replacement services was viewed as absolutely necessary.
 - *However, there was less of a call for compensation around diverted trains. Most pointed to softer factors (comfort, capacity, familiarity) that could mean that even a slower train would be worth paying the ticket price for in the event of route disruption.*

They could even have like a loyalty card scheme; take ten journeys anyway and get your next one free...

Vulnerable Passenger, Arthritis

I don't necessarily think we need compensation as long as they have a plan in place and they stick to it. We're not unreasonable people. It needs upgrading, these things happen.

Manchester, Commuter

A free buttty wouldn't hurt. Or a coffee, you know what I mean? I frequently spend from like £13 to £26, it's a lot, you know?

Manchester, Leisure



Communicating the upgrade

The communications landscape is fraught with negative stories about rail reliability

While the most high-profile stories about rail delays do not relate to upgrades *per se*, these are often the most salient for passengers evaluating the potential success of the Transpennine upgrade. These negative stories filter into passenger assumptions about the upgrade, creating challenges for building trust. If everything to do with rail is behind schedule, they reason, so will be the Transpennine Route Upgrade.

Typical newspaper stories, illustrative of those cited by passengers:

All trains from Manchester to London suspended as signalling fault causes transport 'carnage'

34% of respondents trust the railway to deliver the upgrade and its associated benefits

Animals on railway line causing traffic chaos for commuters in West Yorkshire

Major disruption across UK rail network after heatwave causes chaos

Govia Thameslink Railway faces £5 million fine for May timetable chaos

'Meltdown Monday' leaves hundreds of thousands of rail passengers stranded across the country

Passengers need reassurances that the railway can successfully deliver the upgrade

Tonally, communications must avoid coming across as self-pitying or pleading. Passengers tend not to be interested in the challenges the upgrade poses for Network Rail. They want to know what challenge the upgrade poses for them.

Communications should give passengers a sense of incremental and steady improvement to the route

- The prospect of a large improvement to the route at the end of six years can feel distant.
- Several felt that ‘progress updates’ highlighting (if possible) even minor improvements to the line at the end of the year would improve trust and reinforce the idea that the upgrades are worth the disruption.

If the upgrade does not proceed according to schedule, passengers want clear admissions of the delay

- Clear and public admissions of any delay, either to the upgrade or to the implementation of alternative services, would help institute trust and make it clear that all parties have the passengers’ interests at heart.
- Many passengers want communications material to ‘under-promise and over-deliver’. Passengers are pragmatic about the prospect of delays but expect an open and honest approach.

There is a hierarchy of information that passengers expect across the upgrade lifecycle

While passengers want to see messaging spread across as many channels as possible, some channels are particularly valued for specific messages

One year ahead

What is the plan, and what is the rationale?

TV, Radio, Out-of-Home
Documentaries, news features
Direct mail-outs

I'd need about six months notice of any alternatives just to plan things and get things in order.

Vulnerable Passenger, Chronic Digestion

Six months ahead

What will my alternatives be, and what is the schedule?

Comms partnerships with buses/coaches
Station leaflets, posters
Advertising on trains

I know my mum would want a leaflet she could pin to the notice board, but I'd want it on my phone. I'd like it to be thrown at me a little bit.

Huddersfield, Leisure

One month ahead

How is it going? Revisions, feedback, lessons learned

Newsletter updates from a single brand identity
Partnerships with businesses, local government

One day ahead

What are my options today?

E-mail updates
Station signage

Wherever you're buying a ticket it needs to be shown.

Manchester, Leisure

On demand

Has anything gone wrong?

Social media
Dedicated app
Station staff

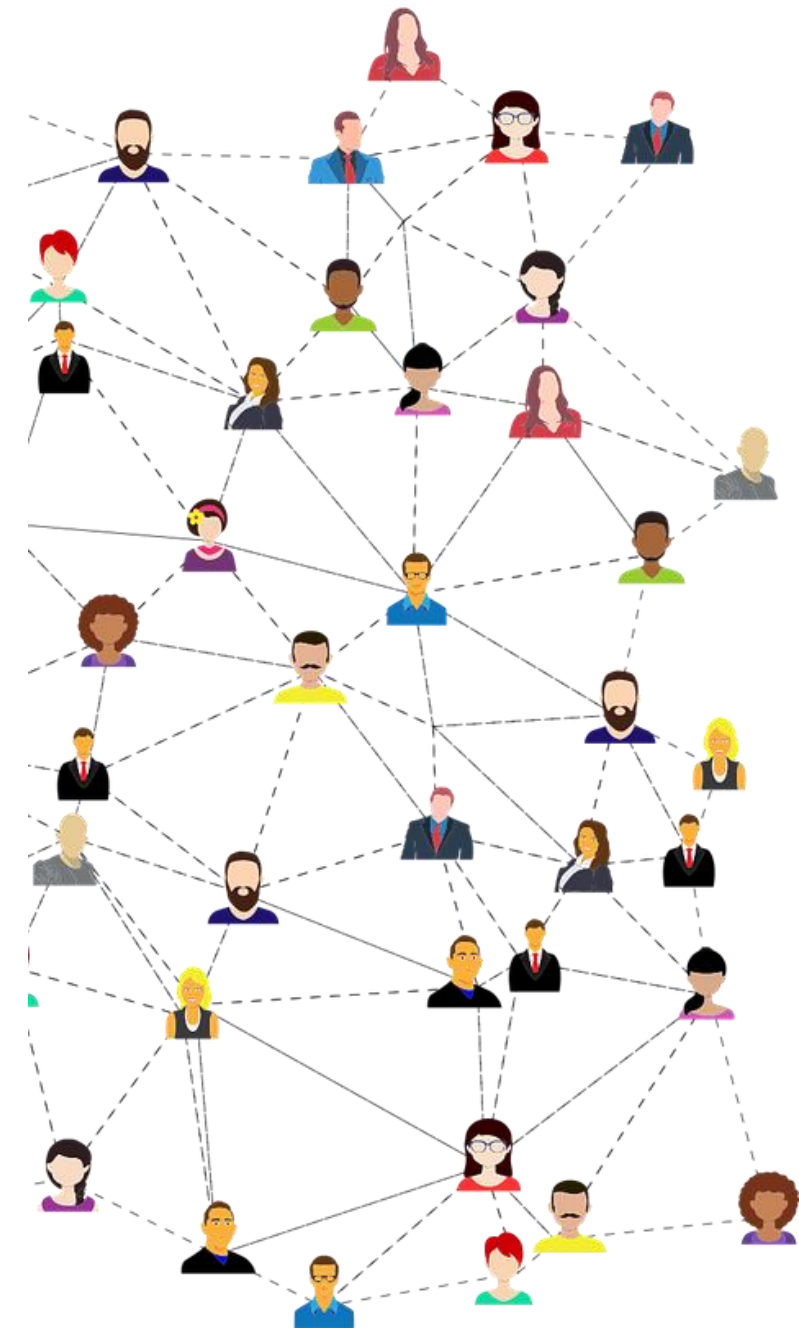
While some information is more important at different points in the run-up to the upgrade, the information should be accessible on an ongoing basis

Most would sign up to either a social media page or email newsletter, but few would sign up for both

- Some pointed out that email updates can be **ignored** or swiftly deleted without reading. Comparisons were drawn with more generic email updates from Transport for London.
 - A more '**dedicated**' email newsletter or social media page that pertained explicitly to the upgrade may feel more attention-grabbing and less likely to be ignored.
- Most used social media in some form or another, and valued the **instant, on-demand** nature of these platforms.
 - Information on social media pages is more easily retrievable, and is made readily apparent without having to search for it.
 - Passengers wanted the information '**thrown at them**' to some degree, and social media updates would achieve this.

I think communicate it in a number of ways because then there's no argument that you didn't receive the text or the email. A text, an email and maybe an app as well.

Manchester, Commuter



The campaign should be a collaboration between every major stakeholder in the upgrade

Presenting the upgrade as a **partnership** would reassure passengers that the upgrade is trustworthy and credible

- Passengers need reassurance that bus, coach and train companies are ‘in the loop’ and prepared to deliver a reliable service.
- By featuring as many different involved parties as possible in communications material, Network Rail can show that replacement services will be reliable, punctual and viable.

Giving the campaign a sense of **scale** can help commuters discuss arrangements with their employer

- Alerting employers to the fact that their staff’s journeys may be impacted could reassure commuters that their livelihoods would not be threatened by the upgrade.
- This would give businesses and employees time to make alternative arrangements. Indeed, a considerable number of commuters felt that working from home would be feasible.
- The aim here should be to maximise all available channels of communication, not just to raise awareness but to lend credence to the upgrade as a whole.

I know you hear stories of people getting sacked because they’ve been late too many times because of the trains. If employers knew why, they might be a bit more accommodating.

Huddersfield, Commuter

Let local businesses know. Businesses with a big presence in Leeds. Our HR get a message from someone about disruption and she sends it to everyone and it’s really useful.

Leeds, Leisure

There has to be trust – if they said ‘okay, you’ll have some disruption, but you’ll have this bus, at this place at this time...’ But instead there’s nobody there, you don’t know if it’s going to turn up.

Leeds, Commuter



Conclusions

Conclusions

Passengers are surprised at the duration of the works but accept that the work needs to be done. Commuters in particular see most journeys on the Transpennine Route as satisfactory, but with an underlying discontent about the overall performance of the route, particularly relative to other parts of the country.

However, there is a lack of trust. While 84% supported the upgrade in principle, just 34% of passengers spoken to trusted the railway to deliver the upgrade and its associated benefits.

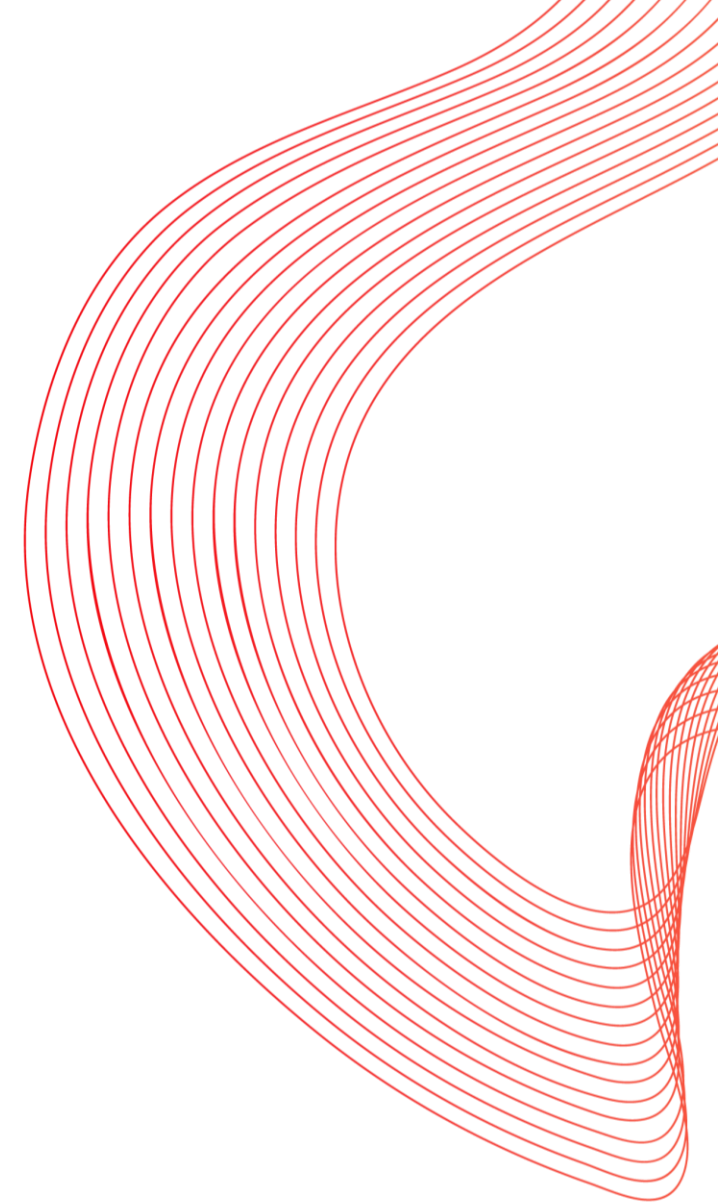
There is a strong desire to continue using trains during the route upgrade, even if they are diverted. However, if the equivalent journey by car is faster, those who are able to would not hesitate to change mode.

Passengers' attitudes towards rail replacement services are affected by negative experiences in the past. While most prefer a through journey on a coach with no changes, those with disabilities voice concerns about coaches' accessibility. Passengers are willing to *trial* journeys by replacement services.

Communication is essential. Passengers need to understand what the upgrades mean for them personally and what their options are at any given time.

Regular updates on the progress of the work are appreciated, and build trust, but are secondary to concise, relevant information about what the upgrade means for them personally.

Passengers, especially commuters and season ticket holders, expect compensation. Others feel that their continued loyalty to the disrupted service should be rewarded through incentives to continue using the train.



“If you could tell the Managing Director of Network Rail anything about the upgrade, what would you tell him?”

To conclude the session, passengers were asked to summarise their thoughts in one sentence

Good luck – If it works with the least disruption I'll buy you a pint!

I want to believe it can happen. How will you and your company convince me? What is your communication plan? How will you build trust?

Superb. Great forward thinking – let's make sure the infrastructure is there beyond the station (e.g. parking!)

