

Whole Industry Strategic Plan

Call for Evidence Response Form

09/12/2021

Responding to this Call for Evidence

This call for evidence launches on 9 December 2021 and will be open for eight weeks until 4 February 2022.

You may respond as an individual or on behalf of an organisation or organisations (please let us know all the organisations you are responding on behalf of) and can submit a response in the following ways:

- Online via the call for evidence [webpage](#).
- Via email to cfe@gbrtt.co.uk using this response template.

We recommend you read the call for evidence launch document in full before submitting your response.

Please send the completed response form, along with any supporting information or attachments, to cfe@gbrtt.co.uk.

In the email subject please include your name and/or organisation and 'WISP call for evidence submission'.

Confidentiality

The information you send to us may be shared with colleagues within Great British Railways Transition Team, the Department for Transport and published or referred to in the Response Summary Report response document. All information contained in your response may be subject to publication or disclosure if requested under the Freedom of Information Act 2000. If you want any information in your response to the call for evidence to be kept confidential, or if it contains sensitive information, you should explain why and identify the information clearly within your response. Extracts from responses used within the Response Summary Report will be agreed with the responder before publication, where information is not already in the public domain.

I am responding on behalf of: *

One or multiple organisations

If you are responding as an individual, please move to Section 2. If you are responding on behalf of an organisation, please fill in Section 1 and Section 2.

Section 1 – Organisation Details

Organisation name(s)*

Transport Focus

Please identify the category, or categories that best describes your organisation(s)*

If multiple categories apply, please list within the “other” field below.

Passenger body or interest group

If other, please state

Please provide a brief description of the organisation(s) you are responding on behalf of.

This may include information about who the organisation represents, the size of its membership and how the views of members were obtained.

Transport Focus is the statutory body representing the interests of rail users in Great Britain. It also represents the interests of bus, coach and tram passengers in England (outside London) and users of the Strategic Road Network in England.

This submission draws from Transport Focus's research base – hyperlink references to the full research are contained within the submission.

Section 2 – Your details

Name

Mike Hewitson

Email address

Mike.hewitson@transportfocus.org.uk

Please choose the region you or your organisation(s) are based within*

If multiple regions apply, please list within the “other” field below.

UK-wide

If other, please state

Note: UK wide selected as it is the closest to our geographical remit for rail. However, it is Great Britain wide (which wasn't an option). Our remit only applies to:

- England
- Scotland
- Wales

Please provide information about the reason for your interest in the Whole Industry Strategic Plan

Transport Focus has a statutory duty to represent the interests of rail users. The WISP will be an important document that sets out the future shape and delivery of rail services. It is important that passenger views are fed into the process.

Strategic Objectives for the Whole Rail Industry

The UK Government has developed five strategic objectives for the Strategic Plan over the next 30 years: **meeting customers' needs, delivering financial sustainability, contributing to long-term economic growth, levelling up & connectivity, and delivering environmental sustainability.** We intend to put these objectives at the heart of the Strategic Plan, and we are using them to guide all of the questions in this call for evidence.

[Click here to see more information](#)

We recognise that many of you are working to similar long-term objectives. We are very interested in how you define and quantify your objectives, and how they match or differ from our own. When considering your response to question 1, please use your experiences to inform your answers and share any examples, taking into account that in all future scenarios we expect affordability to be a significant constraint.

Question 1

- a) How would you apply these objectives to rail in your region or to your area of expertise within the transport sector? Do you have evidence you can share with us of how you have applied similar objectives in relation to rail, and do you consider the objectives to have missed any key areas?
- b) How is it possible to make progress against a number of the objectives simultaneously? Do any of the objectives have larger barriers associated with them than others, or do any objectives pose possible barriers to others? Where would you make the trade-offs?
- c) What long-term trends in wider society, the economy, and the environment will affect these five objectives over the next 5, 10, and 30 years? Please give evidence to support your response.

[Click here to see more information](#)

- d) What are the key uncertainties you consider that the Strategic Plan must be resilient to in order to be effective over the next 5, 10 and 30 years?
- e) Over the next 5, 10 and 30 years, which steps should the sector take to improve integration of rail with the wider transport system (including walking and cycling) in pursuit of these objectives?

Type your answer here or attach relevant documents to your email.

Please note the corresponding document titles or references for any attachments in this box.

Objectives

Transport Focus is pleased to see meeting customer's needs feature prominently in the strategic objectives of the industry. We have long argued that the needs of passengers must be at the heart of the railway. It will be important to ensure that the WISP does not just become a list of engineering projects and that initiatives can be linked back to core outcomes (such customer satisfaction). Equally, it will be important to also focus on 'how' things are delivered as well as 'what' is delivered - for example, when designing an engineering work strategy it will be important to look at the impact of the work as well as the end benefit. If rail is going to drive modal shift and contribute to environmental sustainability then it will have to look at the qualitative, customer experience aspect of rail travel.

Trade-offs

There is inevitably a trade-off between outputs and budgets. Improving performance, widening accessibility, reducing journey times, improving connectivity, supporting the 'levelling-up' agenda and climate resilience will all come with a price tag. There is a potential disconnect between these objectives and with 'reducing costs to Government'. Greater efficiency (both in terms of the cost of capital projects and operational delivery costs) can help to offset some of these costs but some of the strategic objectives will require ongoing investment if they are to be achieved.

There is also a limit to how much of this can be funded via fares without pricing people off rail or deterring new business. Our research with non-users shows that the main barriers to using rail are cost and convenience - if rail travel is seen as expensive then people will choose other modes¹. Existing users already have concerns about the cost of tickets, especially in the peak. In the past 'captive' commuters may have had little option but to pay higher fares if they were to get to work. However, our research suggests that the commuting market will not return to pre-Covid patterns, with people increasingly adopting a mix of working from home and the office². As a result, many commuters will become more sensitive to price. Leisure travel has always been more price sensitive – if people think it too expensive,

¹ [Barriers to travel: How to make rail more attractive to infrequent and non-users](#). Transport Focus.2019

² [Future Rail Commuting Survey](#). Transport Focus. 2021

they will use another mode or go somewhere else. And the railway will have to recognise that as electric vehicle take up continues, the marginal cost of motoring will fall, making rail less competitive. Therefore, it cannot just be a case of offsetting higher costs with higher fares.

We believe that financial sustainability must focus on growth and generating additional passengers as well as cost reduction. For example, marketing strategies designed to raise people's awareness of rail and increase the numbers traveling, competitive fares to attract people, an easily understood fare structure and sufficient flexibility to allow otherwise empty seats to be sold. Achieving these will require a programme of fares reform. In effect, fares reform will become a driver of financial sustainability.

Cost efficiency will clearly remain an important objective. However, there will be a need to avoid false economies. For instance, removing services from timetables may save some money in the short-term but it would be counter-productive if it then suppressed demand. We see 'growing the market' as a key objective for the industry but such a demand-led recovery will only be successful if it is based on a functional and attractive timetable that provides the journey opportunities needed by current and future users.

Long-term trends

In 2012 Transport Focus explored potential social, economic and technological changes that might influence transport priorities in the longer term³. Several key themes were identified, some of which are now clearly emerging:

- A growing and older population.
The UK's age structure is shifting towards older ages. By 2050, it is projected that one in four people in the UK will be aged 65 years and over - an increase from approximately one in five in 2019⁴. This will impact on the design and accessibility of services.
- The growth of the single-person lifestyle
Between 1997 and 2017 the number of people living on their own went up by 16% to 7.7 million, while the UK population increased by only 13%. By 2039, the number of one-person households is projected to rise to 10.7 million⁵. There is a

³ [The Future of Transport](#). Transport Focus and Go-Ahead. 2012

⁴ [Overview of the UK population](#): January 2021. ONS. 2021

⁵ [The cost of living alone](#). ONS. 2019

basic human need for contact, and this won't disappear simply because people live alone – if anything one of the net effects of the rise of one-person households could be a desire for more socialising and more frequent activities with others. Rail could have a role in enabling this, but only if timetables provide attractive services that go where people want, at the time they want them.

- Urban living

In 2015 over 40% of the total UK population was based in 11 city regions. Population projections from 2015 to 2025 showed city regions having a higher growth rate than the national average. Greater London, Bristol, the West Midlands and Edinburgh city regions all have higher projected population growth rates than the UK average⁶.

Rail is ideally suited to moving high volumes of people in and out of city centres. It remains to be seen whether Covid has changed these predictions. Some may have taken advantage of working from home to move out of urban centres while others may have stayed put but adopted more of a local focus – i.e. the '15-minute city' concept whereby city residents are able to meet most of their needs within a short walk or bicycle ride from their homes rather than having to journey into the centre⁷.

- An increasingly 24/7 'always on' environment, heavily dependent on the internet.

The internet has fuelled the ability to work, shop and play at all times of the day. Technology is central to this – people will need access to the internet and their files anytime and anywhere – including when on the train. Being able to 'do something' when travelling by train is already recognised as one of the benefits of rail travel – it can be productive time rather than dead time⁸. For instance, 30 minutes on the train could give you the opportunity to work, or organise your weekend, update your social media status, stream music, or do your weekly shop.

This more seamless, 24/7 environment may blur the distinction between weekdays and weekends and require services later into the evening. It will also

⁶ [Trend Deck 2021: Urbanisation](#). Gov.uk. June 2021

⁷ [How '15-minute cities' will change the way we socialise](#). BBC. 2021

⁸ [Rail passengers' travel time use in Great Britain](#). UWE Bristol. 2011

depend on good and reliable internet connectivity during a journey – something that our research shows can be decidedly ‘patchy’ at times⁹.

- The need for data to be personalised/filtered.

In an age of information and data overload from media and the internet, there is an increasing desire for filtering and customisation and an expectation that the consumer can shape their own experience. If transport continues to mimic trends seen across many other service industries, people will expect it to provide more personalised information – for example, personalised disruption information, prompts on delay repay compensation, and targeted special offers.

- Flexible working and re-defining the workplace

How people work is something brought into sharp focus during Covid. Our research suggests that Covid has accelerated a shift towards hybrid working – with an increase in those expecting to work from home two to three days a week¹⁰. Our work suggests that this is a permanent shift in working patterns rather than a temporary reaction to Covid.

In addition to impacting on timetable and capacity requirements, this could also affect fare structures and railway finances. For instance, it requires season tickets that better match this new, hybrid commuting pattern rather than traditional products that catered to the four-five day a week commuter of old. A decline in commuting volumes will also have an impact on industry revenue and mean more reliance on leisure travel to generate income. However, rail must compete with other modes for this business, meaning an even greater emphasis on quality of service. People will not get the train if it is cheaper, more comfortable and more convenient to drive.

- The search for value

For decades there has been an expectation that the next generation will, in economic terms, have it better than the last. However, it is increasingly being argued that we have reached an end to this assumption, and that today’s children may have a lower quality of life (e.g. in terms of cost of housing, pensions, job security, rising social care costs). Clearly this will not affect everyone, but it will impact on a significant proportion of the population for whom value for money will assume even more significance. People may increasingly

⁹ [Keeping connected: passengers’ experience of internet connectivity on Great Britain’s railways](#). 2020

¹⁰ [Future rail commuting survey](#). Transport Focus. 2021

want to compare costs by different transport modes and look at what they are getting for their money.

- Environmental pressures - carbon reduction and an ever-increasing focus on sustainability.

Rail has an important part to play in the decarbonisation agenda – both in terms of reducing its own carbon footprint and in facilitating shifts away from road and air. Our latest research suggests that sustainability is not a key driver of transport decisions¹¹. So if rail is to drive modal shift, it must be viewed as the better transport choice on grounds of cost and convenience rather than only on its carbon credentials.

Uncertainties

It is inevitable that ‘things’ will change within a 5-year horizon let alone 30 years. So it is important that the WISP process builds in sufficient flexibility to allow it to be updated. This could be either by looking at it on a rolling basis or through formal reviews at set times, or in response to key changes. The important thing is that it remains relevant.

In the short-term, Covid has created uncertainties. How much demand will return, and when? Will commuting recover or is hybrid working here to stay? Hence, initial uncertainties will be in defining a new baseline (i.e. quantifying the ‘new normal’).

In the medium to longer term one of the uncertainties concerns road use. Will Government move towards road pricing, will cheaper motoring in electric vehicles create a surge in demand for car travel, will the continued development of clean air zones affect car use? And in the longer-term, will autonomous vehicles take much of the strain out of driving and offer an increasingly attractive alternative to long distance rail? Rail does not operate in a vacuum – government policies on competing modes (especially road use) will have an impact on modal shift.

It seems that resilience to climate change will also be a significant, if not easily quantifiable, challenge. Ensuring resources are available to prepare mitigations ahead of problems will need to be a central part of planning.

Integration

In general, when passengers decide what mode of transport to take, they are swayed by three key factors: how convenient will the journey be, how much will it

¹¹ [The journey towards sustainable travel](#). Transport Focus. 2021

cost and how long will it take. This applies to the whole door-to-door journey rather than just the rail element. Improving access to and from stations could therefore help increase rail usage and provide additional revenue.

At some stations the solution may be better walking or cycling provision, at others it may be bus connections or car parking – a one-size fits all approach will not work. For this reason, Transport Focus supports the concept of Station Travel Plans that identify bespoke needs at each station.

- *Active travel*

Walking and cycling to the station has obvious benefits for the environment as well as personal health.

It will be important that stations offer secure cycle parking facilities – and potentially at some point charging facilities for e-bikes. Tie-ins with businesses hiring and/or maintaining bikes also has potential in some locations. The Williams-Shapps review was also clear in wanting it to be easier to take bikes on trains, outside peak commuting hours.

The railway will also have to consider how e-scooters are properly managed. This is especially relevant given Transport for London's (TfL) recent decision to ban all privately owned e-scooters from any TfL service or premises.

Active travel will also require a focus on personal security – not just at the station but on the approaches to stations. For example, working with local authorities to ensure that main walking routes are accessible and well-lit or in providing safe cycle routes. Tomorrow's railway must think further beyond the boundary of the train company lease area or Network Rail land ownership.

- *Bus*

There is scope for tying rail and bus timetables into tighter, more mutually supportive arrangements. There is clearly a limit to what the railway can achieve on its own but it should encourage as far as possible improved co-ordination of bus and rail timetables. The advent of the national bus strategy¹², designed to improve the interface between local authorities and bus companies, should help with this in England. This could include:

- Working with bus companies or local authorities so buses stop at a train station if they pass it, or to alter routes slightly to ensure buses pass railway stations

¹² [Bus Back Better](#). DfT. March 2021

- Working with bus companies or local authorities to alter existing schedules to help buses meet certain morning and evening peak hour trains (potentially including some guaranteed connections)
- Displaying bus information at rail stations and train information at certain bus stops/stations
- Creation of bus links to complement the network. This could be either linking one railway to another or forming a 'virtual branch line'.

It could also include combined rail/bus tickets. The existing PlusBus scheme provides a degree of rail-bus ticket integration. Our research in 2015 showed that those who used it were satisfied with it but that there were relatively low levels of awareness in general¹³. The railway should work with Traveline, the new custodian of PlusBus, to develop the product. In particular, help push forward current plans for a digital ticket that can be bought online and shown to the bus driver – addressing one of the historic problems that PlusBus cannot be purchased on the bus. In this way it allows PlusBus to be used at both ends of the journey – both home to station and station to final destination.

The railway should also improve the way it markets through journeys to scheduled bus services that appear in rail retailing systems. Improvements are needed to the way bus times are updated, including for seasonal service changes, and in some locations making the transfer from station to bus as seamless as possible.

Other aspects include interchange facilities at stations. For instance, are bus stops provided and are they situated in the optimum position, are the walking routes from the bus stop to the railway station clearly signed, do they offer level access, and is the link secure and well lit?

- *Car parking*

For many rail passengers driving to the station remains the most viable and practical means of accessing the railway. Bus services may end too early in the evening or not be provided at weekends, or fears over personal security or bad weather may inhibit active travel. For these reasons, car parking facilities at stations remain important.

Our research¹⁴ suggests that:

- A lack of car parking space could actually suppress overall demand for rail.

¹³ [PlusBus user research report](#). Transport Focus. 2015

¹⁴ [Getting to the station](#). Transport Focus. 2007

- If passengers couldn't park at their station some would drive to the next station or drive all the way to the destination - the net effect being to increase car use. Some would also travel earlier in order to get a space – which then further adds to congestion onboard the train by virtue of getting people to travel at busier periods when they don't need to.

Station Travel Plans will need to consider car parking capacity. This should include where parking provision needs boosting and where under-utilised capacity could be better used for things like enhanced cycle facilities. They should also look at the provision of adequate drop off/pick up facilities at stations.

Cost of parking is also an issue for passengers¹⁵. Parking is clearly another source of income for the railway, but it is important to ensure that it does not make the total journey cost so high as to deter travel. There is scope for 'bundling' ticket and car parking prices - and in doing so offering a discount to rail users which is not available to non-rail users parking for other reasons. This might help to preserve capacity for rail users.

Car parking can also play a valuable role for disabled rail passengers. The provision of blue-badge spaces, close to station entrances can help to make rail more accessible.

The railway should engage with the Office for Zero Emissions Vehicles to assess the extent to which passengers are likely to demand the facility to charge an electric vehicle while parked at a railway station. This could be particularly advantageous for those who cannot charge their vehicle at home.

- *Park and Ride*

In 2020 Transport Focus explored user and non-user views about how park and ride schemes could help to reduce the number of car journeys on the motorways and 'A' roads managed by National Highways – the strategic road network (SRN)¹⁶.

One of the barriers identified was a lack of awareness of such schemes and the benefits they could bring, especially if it offers a faster overall journey time. In some instances, a rail-based park and ride will give a faster end-to-end journey than a bus/coach-based scheme and so has potential to be an attractive alternative to driving all the way.

¹⁵ [Parking at the station](#). Transport Focus. 2010

¹⁶ [Park and ride for Highway's England's roads: a solution to congestion?](#) Transport Focus. 2020

The railway should explore the potential for park and ride options with National Highways and work with them to review the adequacy of signage from the SRN to railway stations close to the road network.

Meeting customers' needs

Rail industry customers broadly fall into two types: passengers and freight. The rail network provides important benefits to the customers who rely on it. The Plan for Rail says that passengers must receive high-quality, consistent services day in, day out. This means accessible, reliable journeys that are well connected with other transport services and include new customer offers at stations and on trains.

Since the COVID-19 pandemic began, the rail freight industry has shown its resilience and agility, working to transport food and medical supplies around the country. This example, and others given in the Plan for Rail, highlight how important rail freight is to our economy now and in the future, and how we will develop growth targets for freight that will be included in the Strategic Plan. The Plan for Rail says of freight: 'national co-ordination, greater opportunities for growth and strong safeguards will put rail freight on the front foot.'

When considering your responses, please take account of the likelihood of changes in levels or patterns of passenger and freight demand over the next 5, 10 and 30 years, what that would mean for the rail system, and what will the interventions be over that period that will provide the maximum value for money.

Question 2

- a) Passenger: how will rail passenger expectations, including accessibility requirements, evolve over the coming 5, 10 and 30 years, what will be the driving causes of these changing expectations, and how can they be most effectively met by the rail sector?
- b) Passenger: in your experience, how can we most effectively monitor and assess customer satisfaction? What is a stretching yet realistic ambition for this objective and what measures can we most effectively use to consider success over the coming 5, 10 and 30 years? What evidence can you share to support your view?
- c) Freight: what evidence can you provide regarding the advantage(s) of transporting goods by rail and what evidence can you share for how that could develop in the next 5, 10 and 30 years? What do you consider to be the most effective role for rail freight in the existing supply chains served and those that it doesn't? How could this change over that period? In answering, please explain and take account of likely developments in technology and in the wider economy.
- d) What is a stretching yet realistic ambition for this objective and what measures can we most effectively use to consider success over the coming 5, 10 and 30 years? What are the interventions over that period which will be the maximum value for money, and what evidence can you share to support your claim?

Type your answer here or attach relevant documents to your email.

Please note the corresponding document titles or references for any attachments in this box.

Priorities

Transport Focus's research on priorities for improvement¹⁷ and passenger satisfaction continually emphasises the importance of an affordable, punctual, reliable, frequent service on which you can get a seat or, at the very least, stand in comfort.

These form the 'core product' that passengers want to see improved. How well the industry delivers these goes a very long way in determining how passengers view the railway. The core product is key in determining passenger satisfaction – punctuality has the biggest impact on overall satisfaction while how the train company dealt with delays has the biggest impact on overall dissatisfaction¹⁸. Put simply, if you want happier passengers, run their trains on time.

The bulk of Transport Focus's research on passenger priorities was carried out before the coronavirus pandemic, so it is reasonable to ask whether Covid has changed these. Research during Covid suggests not¹⁹ & ²⁰. The core product is just as important as before and punctuality is still the biggest driver of overall satisfaction²¹, but there is an added emphasis on personal safety²² and cleanliness. There is also a much more heightened awareness of personal space (or lack of) on board trains²³. Additional, as yet unpublished research designed to feed into Network Rail's Wales and Western Region business planning also reflects the continued importance of punctuality, reliability, capacity and value for money. We have attached a confidential, advance copy of that research to this submission. *[Attached file title: Wales and Western CP7 Business Plan research.pdf]*

In the short term it is clear that the railway will have to work hard to get people back on board. Providing additional reassurance and building confidence will be key but this will only really work if the core product is good. There may come a point at which Covid related priorities fade, but it is hard to envisage a point at which

¹⁷ [Rail Passengers' Priorities for Improvement](#). Transport Focus. 2020

¹⁸ [National Rail Passenger Survey \(NRPS\)](#). Transport Focus.

¹⁹ [Rail and bus priorities: Transport User Community](#). Transport Focus. November 2020

²⁰ [Returning to rail: What passengers want?](#) Transport Focus July 2021

²¹ [What drives rail passenger satisfaction?](#) Transport Focus. 2021

²² [Perceptions of safety on public transport. Key drivers analysis](#). Transport Focus. 2021

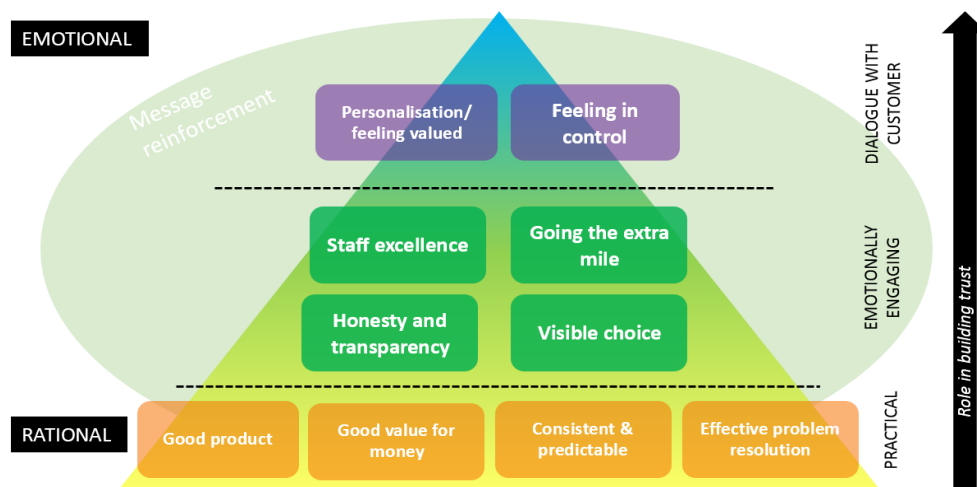
²³ [Understanding attitudes to social distancing and face coverings on public transport report](#). Transport Focus. July 2021

affordability, punctuality, frequency and capacity cease being important. These will remain the bedrock of passenger priorities for the 5,10- and 30-year horizons – indeed it is hard to imagine a point at which they will not be key.

Trust

Trust is an issue that appears throughout our research with passengers. It is present in the individual journey segments: when buying tickets ('have I got the best deal?') and in providing information during disruption ('do I believe what you are telling me?'); and it also underpins the overall relationship with passengers²⁴.

Transport Focus first investigated trust in 2014²⁵. The research showed that the best performing train companies all had relatively high levels of trust, and low levels of distrust. The report identified a hierarchy of customer needs that underpinned feelings of trust.



The provision of a dependable, consistent, value for money product is the key building block that underpins everything else. Without this it is hard to form a relationship with passengers – but doing this alone will not be enough. To really unlock the potential requires additional focus on things like honesty and transparency; helpful, visible staff that 'go the extra mile'; and giving passengers a

²⁴ [Williams Rail Review: Trust in train operators: an exploration of issues influencing passenger trust in rail.](#) Transport Focus 2019

²⁵ [Passengers' Relationship with the rail industry](#) Transport Focus. 2014

greater sense of choice and control. It is this combination of rational and more emotive aspects that builds a relationship between the consumer and the 'brand'.

Accountability and transparency

It is also important that the railway looks at how something is delivered as well as what is delivered. Passengers want a sense that there is 'someone' in charge when it comes to service delivery. They want someone to take overall responsibility for the railway and for this person/body to be accountable for decisions made and the quality of service provided²⁶.

One of the keys to accountability is transparency. Giving rail passengers access to information that matters to them will help them to hold the train company to account and to ask what is being done to improve services in return for the fares they pay. Joint research undertaken by Transport Focus with the Office of Rail and Road (ORR) showed that passengers want punctuality data that is relevant to their journey rather than a company-wide average²⁷. Even when they admit it is unlikely they will read it themselves, they see the value in this data being publicly available as it helps keep the operator on its toes. Indeed, the availability of accurate data may help the railway – a particularly bad journey can linger in the memory and distort passengers' perceptions. Personalised information on things like delays, and compensation entitlements can also help build trust.

The choice of performance metrics, targets and degree of transparency can all influence trust. We strongly endorse the use of the right-time performance measure (on time to within a minute of the scheduled arrival time at every station). Right time better mirrors passengers' own perceptions of punctuality²⁸. Counting trains as on time when they are late plays badly to passengers, many of whom are already suspicious of statistics from their train company. Right time also has the benefit of being easily understood, and therefore trusted, by passengers. It is also a straightforward concept that rail staff can understand and clearly see how their efforts contribute to delivering it.

Accessibility

Disabled passengers have seen improvements to the accessibility of rail services over time, and the industry is progressing. However, there are still some very real

²⁶ [The structure of the rail industry. What do passengers think?](#) Transport Focus. 2019.

²⁷ [Putting rail information in the public domain.](#) Transport Focus and ORR. May 2011

²⁸ [Train punctuality: the passenger perspective.](#) Transport Focus and ORR. 2015

barriers and problems to overcome²⁹.

Clearly there are many practical barriers, such as the physical design and layout of stations and rolling stock that still need to be addressed, not least in providing step free access to stations and when boarding trains. The industry must work (over the 5-, 10- and 30-year horizon) on achieving level-boarding across the network to allow disabled passengers greater independence to travel. The solution relies on a combination of infrastructure improvements and changes to rolling stock procurement policy. For example, as seen with Merseyrail's upgrade of platforms and rolling stock, and with Greater Anglia's new rolling stock which has a retractable step to bridge the gap between train and platform. At core Thameslink stations, platform humps have been installed at fixed train locations to provide level boarding for passengers with reduced mobility. It also requires improved information provision so that people can find out about things like the step-gap at station before they set off.

But it isn't just about physical improvements, a lack of confidence creates barriers as well: will the train run as planned, will the toilet be open, will staff be there to help, what happens if services are disrupted? This applies to all passengers but the consequences of getting it wrong can be much greater for some disabled passengers.

Disabled passengers need accurate, precise information about the facilities and services available at stations. This must be kept up to date – with any failures (such as toilets being out of order) being loaded into journey planners and other live systems as soon as possible.

Covid has also had an impact on confidence. Our research shows a gap between the perceptions of disabled people who had travelled and those who had not – with those travelling feeling that rail was much safer than those not travelling³⁰. To some extent this gap between experience and perception reflects the efforts public transport operators made to help passengers travel with confidence and feel safe. But it also clearly highlights the scale of the challenge facing operators in the short-term as they try to persuade people to return to public transport in future.

Better accessibility benefits all passengers, but it also opens new markets and income. In 2014/15 the Department for Work and Pensions estimated that disabled people and their families in the UK had an aggregate annual household income of

²⁹ [Disabled rail passengers research](#). Transport Focus. 2019

³⁰ [Accessible transport: unlocking a better normal](#). Transport Focus 2021

£249 billion³¹. The campaign group Purple estimates that the transport sector loses up to £42million each month through not being accessible³². 'Tapping into' this market will require:

- Engagement – ensuring those with a lived experience of disability are consulted and heavily involved in the design of services.
- Staff training – a culture of 'how can we help' rather than 'are we compliant with the regulations' being embedded throughout the railway
- Awareness – improved awareness of disability, especially non-visible disabilities.

Customer satisfaction

It is possible for a train company to meet its punctuality and cancellation targets while offering a poor passenger experience - for example dirty trains, unhelpful staff and poor passenger information. Therefore, measuring how passengers feel is essential. In our view the best way of doing this is through monitoring passenger satisfaction - the best judge of quality being those who have used the services in question. This can sit alongside other 'harder' targets' (such as punctuality, cancellations and mystery-shop quality regimes) to give a comprehensive, more balanced view of how well services are being delivered.

To this end we are pleased to see the emphasis on customer satisfaction in the WISP. It will, though, be important that this is a proactive process – with targets being set and action plans being triggered if these targets are not met. It also needs to matter to the industry – which means that there must be buy-in at senior levels and a commitment to continuous improvement.

We believe that good satisfaction monitoring will drive up the quality of service provided. We also believe that it promotes a greater sense of accountability between service provider and consumer. This sense of accountability and transparency is enhanced when the monitoring is seen as being independent – any sense of the industry 'marking its own homework' will reduce the value of such targets.

Transport Focus is pleased to be working with Great British Railway (GBR), Rail Delivery Group (RDG) and Department for Transport (DfT) colleagues on the development of a single, comprehensive and cost-effective core customer insight programme. It is envisaged that this will replace the existing Wavelength and National Rail Passenger Survey (NRPS). The expectation that results will be publicly

³¹ [The spending power of disabled people and their families in 2014/15.](#)

³² <https://wearepurple.org.uk/the-purple-pound-infographic/>

reported and data openly available for analysis and interrogation will ensure credibility and transparency.

Delivering financial sustainability

Rail is both a public service, supported by the taxpayer, and a business, run by private operators, with paying passenger and freight customers. The railways have received unprecedented levels of public support throughout the pandemic, protecting the essential services that people, including commuting key workers, rely on. As the recovery and rail reform gains pace, as with all areas of public expenditure, there is an onus on the rail sector to ensure value for money for users and taxpayers in how funds are used, and it must harness the incentives of the private sector to deliver the service in the most cost-effective way.

The railway, accordingly, must seek to deliver infrastructure and services more efficiently, in order to maximise beneficial outcomes while balancing costs against revenue and taxpayer funding. This is more than just a short-term issue: we are clear that reducing the cost of the railway, increasing efficiency including through innovating with private partners, and achieving a better deal for users and taxpayers is a critical priority over the next 30 years.

When considering your answer to the question below, please consider how we can support greater efficiency (such as joined up operations), innovation, alternative sources of funding and/or cost base reduction. Similarly, what steps you would propose to improve the efficiency and reduce the cost of infrastructure projects, operation and maintenance, and what evidence you have to support your response.

Question 3

Where are the most significant opportunities and barriers to delivering financial sustainability in the rail sector over 5, 10, and 30 years and how do we achieve/overcome them? How can we most effectively monitor and assess this? What is a stretching yet realistic ambition for this objective and what measures can we most effectively use to consider success over the coming 5, 10 and 30 years? What are the interventions over that period which will be the maximum value for money?

Type your answer here or attach relevant documents to your email.

Please note the corresponding document titles or references for any attachments in this box.

The Williams-Shapps Pan for Rail makes it clear that there has to be a focus on reducing costs and driving greater efficiency. The creation of GBR should reduce some duplication throughout the sector and this will provide savings, but many of rail's costs are fixed and will not easily be reduced. For example, there may be some efficiency savings to be found in maintaining tracks, signals, bridges etc but fundamental savings would probably have to depend on 'doing less' – either in the form of less maintenance (which has safety implications) or in having less network to maintain (closing routes). Achieving significant savings will be difficult without damaging the attractiveness of the product, thereby worsening the problem not improving it. For example, moving to an hourly frequency of service may end up being a false economy if it results in people in driving instead.

To that end, and as we set out in question 1, revenue generation – in the form of selling more tickets (potentially at a lower price) – might provide a better route to financial sustainability than cost cutting. This would require marketing strategies designed to raise people's awareness of rail and increase the number traveling, competitive fares, an easily understand fare structure and sufficient flexibility to allow otherwise empty seats to be sold.

One of the key barriers to this is the current fares structure. Many passengers see this as complicated and confusing³³. It is hard to explain, for example, why an off-peak return may be only 10p or £1 more expensive than a single. It is even harder to explain split ticketing - how can a combination of tickets be cheaper than a through-ticket? Split ticketing has become the elephant in the room when it comes to trust.

Problems with the fare structure can be exacerbated for disabled passengers. For example, those with cognitive or intellectual impairments can find the range of choices particularly difficult to understand and the language of ticketing difficult to penetrate³⁴.

A simpler fare structure will help everyone. But simplicity should not be used as an argument to severely limit choice. If the product range is good and/or you can personalise products, then people will be willing to accept some complexity in

³³ [Fares and Ticketing Study](#). Transport Focus. February 2009

³⁴ [Disabled rail passengers research](#). Transport Focus. 2019

exchange for more choice and easy ways to buy. The key will be in providing clear information at the point of purchase.

Single-leg pricing is one of the keys to unlocking better value travel for passengers. It is logical, transparent and easy to understand. It does away with the confusion of the 10p or £1 difference between some singles and returns and also enables passengers to pay only for the level of flexibility they need. It allows passengers on longer distance services to mix and match ticket types. For example, in not having to buy a fully flexible Anytime return when they plan to return during the Off-peak; or in combining an Advance fare for the outward leg (when the time of travel is known) with a more flexible ticket for the return.

Research by the Rail Delivery Group (in association with Transport Focus) found an overwhelming desire for a root and branch reform³⁵. There was a real desire for new products that match the way that people want to travel today rather than the mid-1990s when fares regulation was established. We accept that this will require a root and branch assessment of current regulation. Current regulation creates inflexibility – for example in preventing the railway selling otherwise empty seats at discounted prices. This isn't an argument for complete de-regulation, more a case of replacing it with something more fit for purpose.

We recognise the financial pressures facing Government and the railway, but it is important that fares reform is not forgotten. Post-Covid, the railway is going to have to work hard to reassure and attract passengers. It faces challenges in doing this: as the take up of electric vehicles accelerates, the marginal cost of using a private car will fall dramatically; and many previously captive commuters will now have more flexibility to work from home. A simple, easy, trustworthy and more flexible fares structure has the capacity to address these and unlock the railway's potential.

³⁵ [Easier fares for all](#). RDG. 2019

Contributing to long-term economic growth

Rail helps to boost productivity and growth through improved connectivity and job creation, enables supply chains, delivers goods to businesses and consumers and directly employs over 240,000 people (source: the rail sector in numbers). Among other factors, such as population growth, long term economic growth is influenced by emerging technology, and innovative, more effective ways of thinking and doing things. Over the next 30 years, wider economic, social, environmental and technological trends will change the role rail plays in our economy. It will be for the whole sector to demonstrate that it cannot only continue to deliver wide economic benefits in the face of a changed economy but that it can find new ways to catalyse growth and prosperity.

When considering your answer to the questions below, please share examples of any relevant local, regional and national growth and productivity, and examples of innovations and technology from the UK and abroad, research into trends that may influence rail's contribution to economic growth, and/or new ways of thinking that should be used in or for the rail sector over the coming 5, 10 and 30 years.

Question 4

- a) As Britain recovers from the effects of the COVID-19 pandemic, what evidence do you have for how rail can contribute to wider economic growth over the next 5, 10, and 30 years? What is a stretching yet realistic ambition for this objective and what measures can we most effectively use to consider success over the coming 5, 10 and 30 years? What type of interventions over that period will provide maximum value for money from rail's economic contribution, and what evidence can you share to support your views?
- b) In the context of enabling development and regeneration opportunities both in the immediate vicinity of stations and within the surrounding area, how can rail best facilitate improvements to places and local growth, through improved connectivity and unlocking commercial activity, housing, and employment over the next 5, 10 and 30 years?
- c) What innovative and modernising ideas do you have which would benefit the railway while supporting the strategic objectives? Please give evidence and make reference to how they would maintain or enhance the railway's safety record.

Type your answer here or attach relevant documents to your email.

Please note the corresponding document titles or references for any attachments in this box.

Levelling up and connectivity

The Secretary of State for Levelling Up has outlined four key outcomes on which the government will focus:

- Empowering local leaders and communities;
- Boosting living standards by growing the private sector and improving productivity and connectivity;
- Spreading opportunity and improving public services; and
- Restoring local pride.

Rail has an important part to play in working toward these outcomes, and particularly so in connecting the nations, regions and communities of the UK. Improved rail links can connect people to jobs, education and skills, high-quality housing, social opportunities, services, and green spaces, as well as encouraging the growth of businesses, and attracting leisure visitors into an area. Improving stations and surrounding areas can also act as a catalyst for regeneration and development and a cause for local pride.

At present, usage of rail differs widely across the UK; before the pandemic, almost two thirds of all rail journeys made were in London and the south east ([Rail Sector in Numbers report from 2019](#)).

When answering your questions, consider the ways in which rail can be used to improve connectivity and local economic growth over the next 5, 10, and 30 years.

Question 5

- a) What evidence can you provide for how the rail sector contributes to the four levelling up outcomes and to improving connectivity across Great Britain, including through cross-border services? How does this change depending on the type of place where the sector operates (including in cities, towns and rural areas), and what are the most cost-effective ways at the sector's disposal to improve that further during the next 5, 10, and 30 years?
- b) How could the rail industry, over the next 5, 10, and 30 years, become more responsive to, and more accountable to, local communities and passengers? Please give evidence and examples in your response.
- c) What is a stretching yet realistic ambition for this objective and what measures can we most effectively use to consider success over the coming 5, 10 and 30 years? What are the interventions over that period which will be the maximum value for money, and what evidence can you share to support your views?

Type your answer here or attach relevant documents to your email.

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Accountability/engagement

The culture of engagement has undoubtedly improved in recent years. This needs to continue. Transport Focus research constantly demonstrates the value of involving passengers and the resulting benefits that accrue to the industry.

For example, research on engineering work on the Brighton Main Line upgrade³⁶, Derby resignalling³⁷ and Kings Cross station³⁸ shows that giving passengers timely, accurate information can improve satisfaction levels with the way that planned disruption was managed. Higher awareness of disruption also leads to greater acceptance of the alternatives – passengers can cope better with disruption and bus replacements if they have been able to plan for it.

Other good examples surround the design of new rolling stock. Transport Focus worked with Merseytravel to gather passenger input throughout the entire design process³⁹. The result is a train that better meets the needs of those who will use it.

Engagement should not just be reserved for the big set-piece projects above. The railway needs to better understand its customers so it can communicate more effectively. As well as facilitating better marketing and problem resolution, this could also involve engaging passengers on decisions affecting their services – for instance, contacting passengers who have opted-in to ask for feedback on proposed changes to their home station. This could also help improve levels of trust.

The railway must embed a culture of engaging passengers on decisions that matter to them – for example, timetables, engineering works, new rolling stock, station upgrades. This is especially important when it comes to accessibility – involving people with a lived experience of disability will be essential in helping to design services that meet all needs.

The community rail movement has an important role here. The Community Rail Network's report into social inclusion shows how community rail partnerships can also

³⁶ [Brighton Main Line Improvement Project – the passenger perspective](#). Transport Focus. September 2019

³⁷ [Derby resignalling works](#). Transport Focus. March 2019

³⁸ [Kings cross station closure](#). Transport Focus. February 2020

³⁹ [New trains for the Merseyrail Network – What passengers want](#). Transport Focus. February 2021

be catalysts for growth and participation⁴⁰. The report shows that the benefits being realised through community rail activities are far broader than boosting passenger numbers alone. It helps different groups access rail travel and links people who may otherwise be marginalised or disadvantaged to greater opportunities for employment, education and recreation. Outreach, engaging and educating people about how rail 'works' and how to access the network seems to hold great potential for widening and increasing the customer base.

The report also shows how community rail partnerships work to promote more affordable access to rail by increasing understanding of ticketing and, in a few cases, work with train operators to directly develop, manage and promote discounted travel schemes. Examples include the Settle-Carlisle Railway's Dales Railcard, offering discounts on the line for local residents, and Devon and Cornwall Rail Partnership's carnet ticket scheme on the Tarka Line, providing more affordable travel for families and part-time workers.

Community rail partnerships are also well placed to develop partnerships with the tourism sector⁴¹. We believe that local initiatives such as these will be effective in making the railway more a part of local communities rather than something that just passes through it.

⁴⁰ [Community Rail & Social Inclusion](#). Community Rail Network.. 2018

⁴¹ [Developing partnerships with the tourism sector](#). ACORP.

Delivering environmental sustainability

The Plan for Rail commits to the creation of a comprehensive environment plan that will establish rail as the backbone of a cleaner future transport system, one that aims to protect and enhance biodiversity and the natural environment. That plan, the Sustainable Rail Strategy (SRS), will be one of the inputs to the Strategic Plan, and will build on and develop a strategy for achieving the policy commitments set out in both the UK's [Transport Decarbonisation Plan](#) and the [Rail Environment Policy Statement](#) that were published in July 2021, as well as the Net Zero Strategy from October 2021.

In addition to tackling the causes of climate change, the rail network must also be able to adapt to the changes already being seen. This means preparing for the impact of extreme weather events and increasing the resilience of the rail network to the impacts of these events – for example, flooding.

When answering your questions, consider the ways in which rail and the rail estate can contribute to wider national and regional environmental policy agendas, support decarbonisation, conserve and enhance biodiversity, improve air quality and increase renewable power generation.

Question 6

- a) What is a stretching yet realistic ambition for this objective and what measures can we most effectively use to consider success over the coming 5, 10 and 30 years? What are the interventions over that period which will be the maximum value for money, and what evidence can you share to support your views?
- b) What use can the rail sector make of emerging or existing technologies to reduce its impact on the environment and enhance biodiversity over the next 5, 10, and 30 years, and, in a proportionate and cost-effective way, help national and regional authorities to meet their environmental objectives?
- c) How can rail best invest in climate resilience, supported by smarter forecasting, planning and technology, over the next 5, 10, and 30 years and what evidence do you have to support your view?

Type your answer here or attach relevant documents to your email.

Please note the corresponding document titles or references for any attachments in this box.

We know from previous insight over many years that cost and convenience plus, to a lesser degree choice and control of when and how to travel, determine how we choose to move around⁴². Our research in 2021 shows that carbon/the climate are still not top of mind considerations when it comes to determining the mode of travel⁴³. This found that safety, convenience, ease, speed and cost all rank above sustainability when people are making decisions about how they travel. People are generally not prepared to make significant sacrifices in order to travel more sustainably – whether that is in terms of time, cost or convenience. The compromise doesn't feel worthwhile due to the overall negative impact on them as an individual. Some also question why they should change to a more sustainable mode when other people fly regularly.

So, in the short-term at least, simply appealing to people to 'do the right thing' is unlikely to work. People will move to rail when it meets cost and convenience criteria. This means continuing to offer an attractive core product.

It also means investing in climate resilience measures designed to mitigate the impact of severe weather on performance. The more that rail offers a dependable, trusted form of transport (especially when other modes are affected by bad weather) the more attractive it becomes to consumers.

⁴² [Williams Rail Review – Barriers to travel: How to make rail more attractive to infrequent and non-users.](#) Transport Focus. 2019.

⁴³ [The journey towards sustainable travel.](#) 2021