Network Rail Wales and Western region:

passenger research for 2024-29 business plan

March 2023

transport**focus**

Foreword

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Putting passengers at the heart of planning is vital. Transport Focus therefore welcomes Network Rail Wales and Western region's approach to developing its strategic business plan for the next five-year control period. We are pleased to have been able to work with Network Rail to deliver the passenger research reported here.

Passengers know relatively little about Network Rail, its role and responsibilities, its relationship with the train companies they use, or how the business is planned. However, they were pleased to have their views canvassed through this research and to have had their say in what the business plan should specify.

It comes as no surprise that passengers' prime concern is for the railway to deliver a reliable, punctual service that offers good value for money while having the capacity to meet demand. Passengers see the importance of the railway acting in a sustainable fashion, but in the main 'sustainability' for a passenger means the railway coping with adverse weather events and continuing to deliver a reliable service.

This research has been invaluable in informing the design of our Great Britain-wide research resulting in our publication *Britain's railway: what matters to passengers*.

Guy Dangerfield
Head of strategy

NetworkRail

Network Rail Wales and Western region owns and manages the railway infrastructure that serves the communities and businesses of Wales, the Thames Valley, west of England and the south west peninsula. We work with train operators to deliver train services as safely, reliably and punctually as possible.

Every five years Network Rail sets out its plans for the next five-year investment period. We have engaged widely with local stakeholders in preparing our investment plans. Many of these stakeholders, including Transport Focus, represent the interests of passengers, but we wanted to go further and hear directly from passengers themselves.

We were pleased to work with Transport Focus on this research to help inform our strategic business plan for the next investment period starting in 2024. Having the best possible understanding of what's important to passengers is an important part of our commitment to putting passengers first and developing credible plans.

We have found the Transport Focus research immensely helpful in informing and shaping our strategic business plan. The first phase of qualitative research through focus groups influenced our draft planning, and the second phase of research was able to confirm we were on the right track with our plans.

The very challenging economic climate for the railway and the country more widely means we are having to make some tough decisions. We know that we can't deliver everything that's important to passengers on our own and we're committed to working collaboratively with the train operators to improve the railway for passengers. This research gives us confidence that we now have a good understanding of passengers' expectations to enable us to make the right decisions and to work together to create an efficient railway that's fit for the future and provides the best possible service for passengers.

David Tunley MIAM
Long term business planning manager,
Wales and Western

Background

Transport Focus has been working with Network Rail's Wales and Western region to generate insights from passengers to feed into the Region's business plan for Control Period 7 (CP7) covering the financial years 2024-2029.

In line with Network Rail's Putting Passengers First initiative, the Wales and Western region wished to ensure that its business plan was based on passengers' experience of the railway in the region and how they would prioritise spending over the five-year period from 2024. Transport Focus is delighted to support an initiative that puts the passenger at the centre of decision-making around the railway's spending plans.

Transport Focus published *Rail Passengers' Priorities for Improvement*[1] based on quantitative research in 2020. That report informed our approach to this latest qualitative research, carried out in two phases. The first, comprising focus groups and depth interviews, was to understand what passengers want from Network Rail and the second, follow-up interviews with respondents from phase one, was to validate the plans drawn up by Network Rail based on the findings of phase one.

This approach has been particularly valuable as it enables us to be confident that the research has been understood and correctly translated into plans for CP7 and that the planning process has been truly consultative.

The original intention had been to conduct a subsequent stage of research in the region to put numbers to passengers' attitudes and expectations. In the event, it was decided to conduct quantitative research nationally and the Wales and Western research was used to input to the quantitative questionnaire. That research has been published as *Britain's railway: what matters to passengers*[2].

Illuminas, an independent research agency, was commissioned to undertake the Wales and Western region research programme. Detailed findings of both stages of this research are available on our website[3].

1 Please see: https://www.transportfocus.org.uk/publication/rail-passengers-priorities-for-improvement-2/
2 Please see: https://www.transportfocus.org.uk/publication/britains-railway-what-matters-to-passengers/
3 Please see: https://www.transportfocus.org.uk/publication/network-rail-wales-and-western-region-passenger-research-for-2024-29-business-plan

Key findings

Our research found that passengers broadly agreed with Network Rail Wales and Western region's initial plans and priorities and plans for Control Period 7 (CP7). Phase one of the research uncovered priorities for passengers which informed the context for the CP7 business plan. Phase two confirmed the passenger priorities uncovered in phase one and validated the approach that Network Rail was taking.

Experience of rail travel

The people we spoke to were all existing or lapsed (because of the pandemic) rail passengers. Broadly they are satisfied with rail; they may have 'horror stories', but generally the service is seen as satisfactory. There are underlying frustrations around capacity and crowding (potentially heightened by Covid fears at the time this research was carried out) but cost and value for money are the primary worries for most passengers. Concerns around personal safety and antisocial behaviour appear to have grown in importance since previous research on this topic.
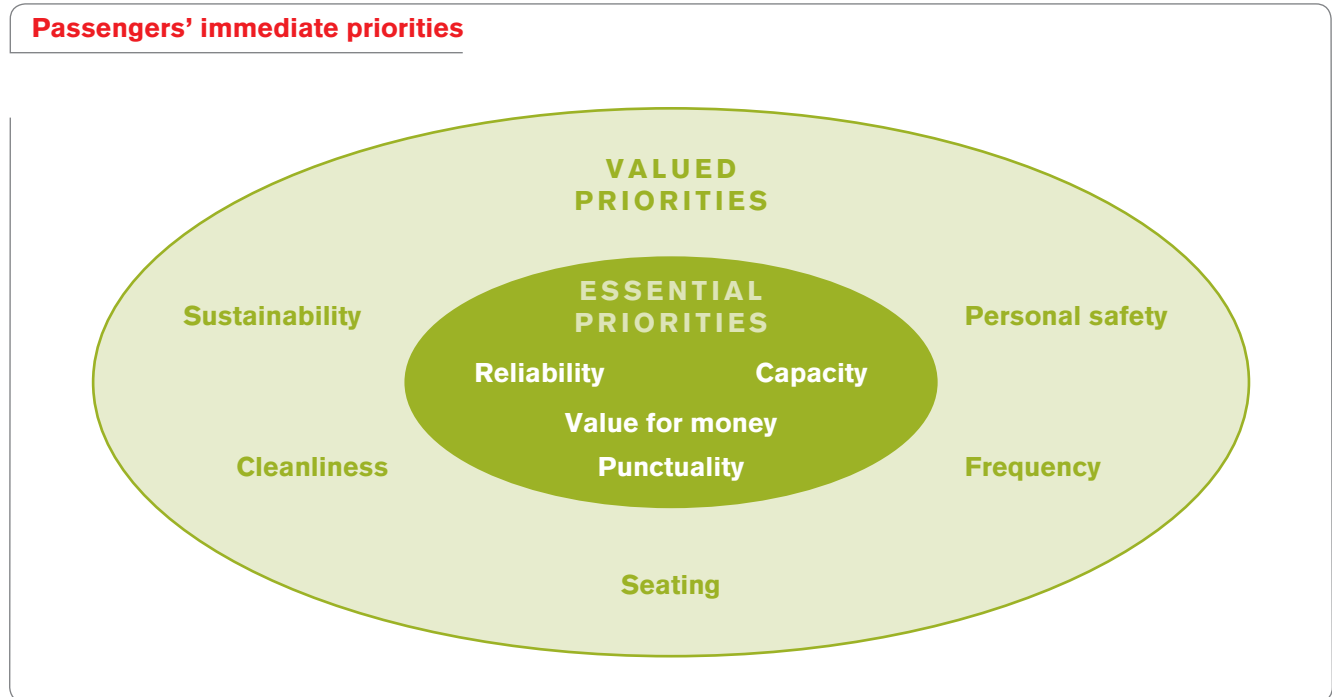
A two-tier operation
There are suggestions that the railway has become a 'two-tier' operation with longer-distance services seeing investment (including electrification) and benefiting from more modern rolling stock and station facilities, while rural services make do with older, diesel-powered trains.

Passengers see a clear difference between the long-distance railway with services to major cities, and local, rural services which are perceived to differentiate the Wales and Western region from much of the rest of the country.

The role of Network Rail
That said, the Wales and Western region means little to passengers who don't have much idea how the railway is managed and what Network Rail's role is. Some, often from seeing the 'orange army' at work, recognise that Network Rail maintains the infrastructure. A few, potentially focussing on the 'network' element of the name, think Network Rail has a co-ordinating function across track and trains. But, overall, passengers' attention is focused on the train operators and, after consideration, Network Rail is seen as an enabler of train operator success.

Passengers' immediate priorities

VALUED PRIORITIES

Sustainability

ESSENTIAL PRIORITIES

Reliability   Capacity

Value for money

Cleanliness   Punctuality

Personal safety

Frequency

Seating

The core priorities for most passengers centre on reliability, capacity and punctuality along with value for money, and perceptions are often dependent on journey purpose. Capacity – and cleanliness – took on increased importance during the pandemic but the resultant decline in passenger numbers and the cost of supporting rail during this time has created fears that fares will increase.

> "I'll be honest, I don't know too much about them at all. I haven't looked. Do they oversee the whole of the region?"
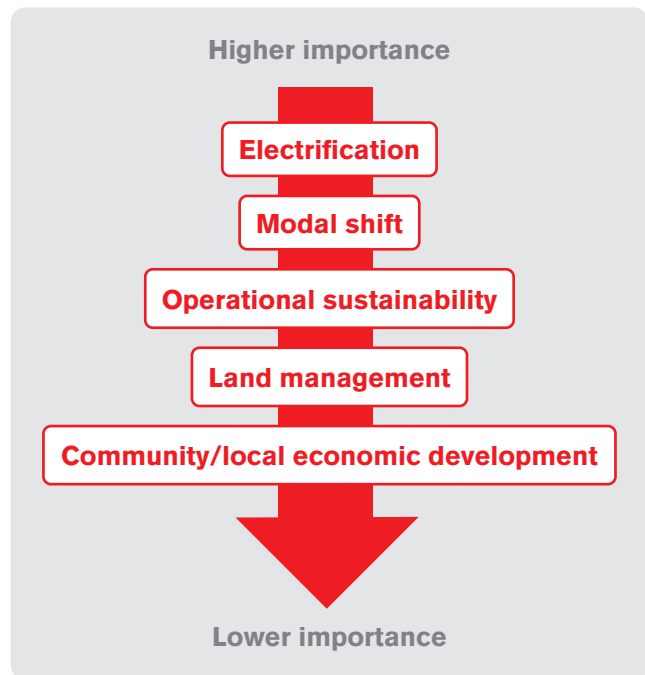> Regional service user, shorter distance

Sustainability

Probably influenced by the COP26 conference and related media coverage around the time the research was undertaken, passengers expect Network Rail to prioritise sustainability.

> "It has to be a major priority, sustainability – but there's no point just electrifying the main lines and having older diesel trains on the little rural lines."
> Branch line user, Wales

While most acknowledge that rail is of itself a sustainable form of travel, that does not excuse Network Rail from playing its part in the sustainability agenda. Further electrification is desirable but passengers expect that this will be limited to the main routes, reinforcing their perceptions of a 'two-tier' railway.

However, sustainability has many facets and passengers seem to find it an amorphous concept and have no particular focus on any one of these. The railway, as with any large corporation, is expected to play its part in recycling generally and to make specific efforts around decarbonisation – whether through replacing diesel trains, through energy conservation at stations and depots, or in its use of road vehicles.

Passengers also support measures aimed at improving climate resilience, although the main motivation here is to maintain or improve reliability with fewer service interruptions attributable to weather events, rather than climate concerns of themselves. Similarly, biodiversity tends to be seen as a 'good thing', as much for providing a pleasant landscape to view from the train window as for environmental benefits. In any event, there is little passenger understanding of the railway's role in encouraging biodiversity.

Higher importance

Electrification

Modal shift

Operational sustainability

Land management

Community/local economic development

Lower importance

Understanding priorities for Control Period 7

Having explored the various issues that passengers prioritise, we then asked them to think about how these might translate to Network Rail's plans for CP7. Understanding of business planning was limited to those engaged in business themselves and many passengers were surprised, although pleased, that their experiences and expectations were being taken into account. Passengers recognise that they don't know a lot about Network Rail and, while they don't feel a burning need to know more, they are keen for the railway to be open and transparent about its operations.

There is some concern about who holds the railway to account when it does not deliver. Passengers tend to expect to complain to the train operator and some believe that Network Rail is ultimately responsible for regulating the operators. Others see it as government's role, but most would welcome greater clarity on 'who to blame' and who to complain to.

Network Rail's strategic vision

We showed the participants in phase one some elements from Network Rail's strategic vision. Many were indifferent, some cynical about 'corporate speak' – although they might say the same of any organisation – and there was a view that this was for internal consumption within Network Rail rather than for passengers. There was no suggestion that Network Rail is poorly run or organised. They expect any organisation of this size to be data-driven in its decision-making.
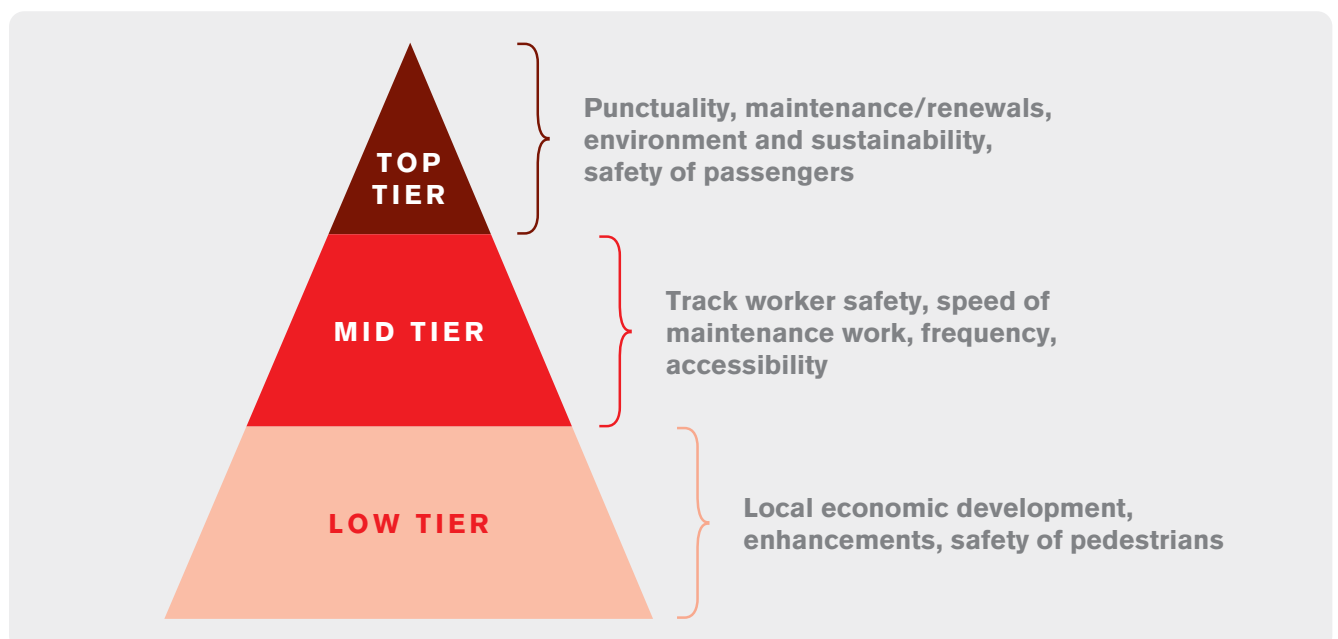
Passengers struggle to understand how Network Rail contributes to the economy – both nationally and locally. Freight operations are seen as a core economic activity, but passengers don't generally see that facilitating travel between regions contributes to economic activity nationally or that operating and maintaining the railway is supporting local economies.

Passengers' expectations for Control Period 7

A reasonably clear consensus and hierarchy emerged from phase one of the research in terms of passengers' expectations of Network Rail's future priorities. The key message from the majority of passengers is to focus on the 'fundamentals' – punctuality, reliability and capacity still dominate passengers' assessments of what constitutes a good service.

This hierarchy has not changed significantly since our previous national survey in 2020 despite the Covid pandemic and associated changes in working patterns and travel behaviours. Sustainability may have risen in the public's consciousness but is seen as being of any real importance to the railway only inasmuch as climate change impacts on reliability.

TOP TIER — Punctuality, maintenance/renewals, environment and sustainability, safety of passengers

MID TIER — Track worker safety, speed of maintenance work, frequency, accessibility

LOW TIER — Local economic development, enhancements, safety of pedestrians

Value for money and investment in the railway

Value for money, on the other hand, has become a more pressing concern with passengers fearing Covid will leave a legacy of fewer passengers and a diminished rail service leading to higher ticket prices. Value for money is a holistic concept – for the price they pay, passengers expect the whole service to perform well, from comfort, cleanliness and facilities to punctuality and reliability.

Any 'worsening' of the network in CP7 would be met with frustration, although many passengers appreciate the financial challenge the railway faces. Whatever happens, the key metrics of punctuality and reliability are held sacrosanct and cannot be allowed to deteriorate even if there is no scope to make improvements.

Passengers tend not to see the railway in the Wales and Western region as suffering from a lack of investment. Their worries are around how well the region is managed rather than what has been spent historically. Looking to the future, there is a degree of acceptance that money that might have been spent on improving punctuality and reliability may now be spent on sustainability activities, so long as there is no decline in current levels of performance. Many can see that a more sustainable railway can be a more reliable railway.

Passenger expectations validated

In phase two of the research passengers reviewed the hierarchy of passenger expectations generated in phase one, shown on page 6, and agreed that they were broadly accurate and in the correct order. However, while most passengers agreed with the top tier issues, there were some areas of contention. Some argue that all aspects of safety should be top tier, some suggest that frequency of trains should be higher priority and some (particularly those with additional accessibility needs) see accessibility as a higher priority.

Validating Control Period 7 business plans

Overall, passengers endorse Network Rail Wales and Western region's plans for CP7. Phase two of the research looked at the context within which the plans are being made, the consultation process so far and Network Rail's aims for the railway service that it will deliver. We also asked passengers to validate the hypotheses from phase one of the research that have guided the development of the CP7 business plan, as well as getting answers to a number of additional questions that had arisen in the process.

The context for Control Period 7 plans

We showed passengers the context for business planning which included consideration of the following:
- the impact of the pandemic and subsequent societal changes such as hybrid working
- the impact of climate change and adverse weather on railway performance
- reform of the railway industry bringing Network Rail and the operating companies closer together
- the evolution of technology and the need to invest in research and development to maximise opportunities
- the safety of passengers and the workforce being paramount.

Passengers understand that Network Rail will have to adapt to new conditions following the pandemic and given the climate crisis. They don't all agree on the long-term impacts, but do accept that new working patterns are here to stay and that the challenge of climate change is real and urgent.

"It's all very relevant. Society's changing, work needs to take place, protecting the environment, obviously the pandemic recently, and technology is ever changing. You always have to keep up to date and almost ahead even. Safety is obviously paramount. I think they've definitely covered everything."

Leisure, lapsed, shorter distance

Consultation with stakeholders

Prior to phase two, Network Rail consulted with the following group of stakeholders:

* local authorities
* local transport authorities
* Local Enterprise Partnerships
* Welsh Government
* passenger train operating companies
* freight train operating companies
* rail freight end users
* rail user groups.

Passengers interviewed in phase two of the research saw this as a valuable exercise and, while they weren't always familiar with the stakeholder groups, they were willing to trust that Network Rail had talked to the right people.
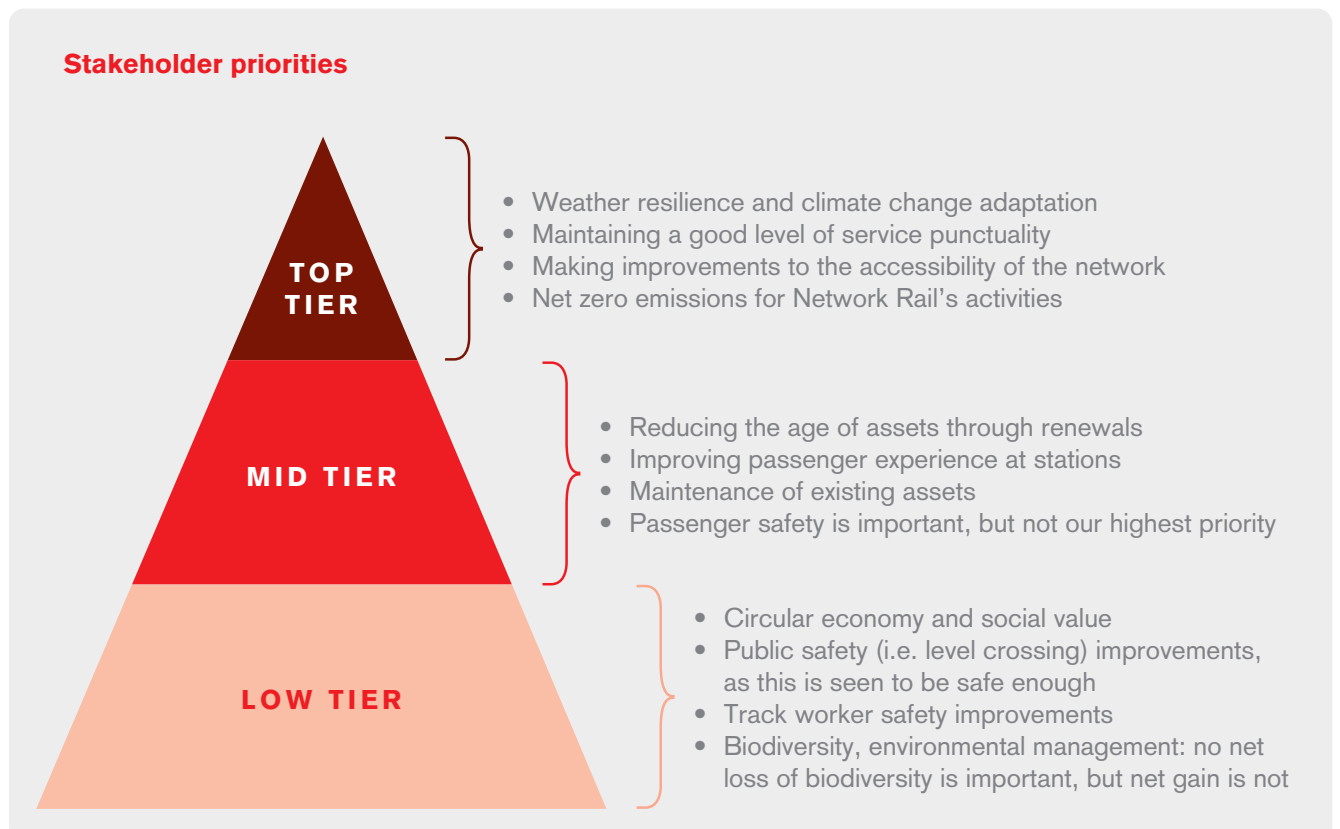

> *"It's good that stakeholders were consulted. It's inclusive. They're not just listening to one group; they've gone to other people or other companies which makes complete sense."*
> Commuter, lapsed, longer distance

Stakeholder priorities

Passengers agree that stakeholder priorities, particularly the top tier, are broadly consistent with passengers' views. However, views on accessibility are, again, more mixed. Many feel it is currently good enough or concede that they have not given it much thought, while for others, it is a 'hot' issue. Similarly, the positioning of safety issues causes some debate. On reflection, most accept that if the railway is already safe, safety need not be a major priority for improvement, but not all are entirely comfortable with this.

Stakeholder priorities

TOP TIER
* Weather resilience and climate change adaptation
* Maintaining a good level of service punctuality
* Making improvements to the accessibility of the network
* Net zero emissions for Network Rail's activities

MID TIER
* Reducing the age of assets through renewals
* Improving passenger experience at stations
* Maintenance of existing assets
* Passenger safety is important, but not our highest priority

LOW TIER
* Circular economy and social value
* Public safety (i.e. level crossing) improvements, as this is seen to be safe enough
* Track worker safety improvements
* Biodiversity, environmental management: no net loss of biodiversity is important, but net gain is not

Network Rail's aims

We showed phase two research participants an outline of how Network Rail intends to reflect stakeholder (including passenger) priorities in its plans. These aims can be summarised as follows:

Network Rail aims to offer for passengers, freight and funders a railway which is:
- affordable
- resilient
- responsible
- safe
- reliable.

Passengers have endorsed these aims and are particularly happy to see affordability appear prominently, although there is some scepticism about what will happen to fares given rising inflation. Given the concern, for some, about whether safety should be a priority, passengers are also reassured to see that safety has been clearly stated as a goal. Once again, passengers are clear that their priority is for Network Rail to get the fundamentals right; reliability will continue to be the yardstick by which passengers measure the performance of the railway.

Planning hypotheses and questions

Network Rail's used the findings from phase one to develop a set of hypotheses which, if confirmed, would feed into the business plan. In the main, passengers in phase two of the research confirmed these hypotheses. Network Rail also had some outstanding questions that we put to passengers in phase two of the research.

Hypotheses

Punctuality and reliability are sufficiently strong
Passengers for the most part agree that punctuality and reliability are sufficiently strong in Wales and Western region. Although many passengers have their own 'horror stories', the service is not seen as fundamentally unreliable, although it must not be allowed to get worse.

Cancellations are worse than delays
Network Rail believes that it should prioritise avoiding cancellations, even if this sometimes means trains are delayed. This was borne out by passengers in phase two of the research. Delays can be frustrating, but passengers feel they can cope as they know they will reach their destination eventually. Cancellations, on the other hand, feel more serious and give rise to a fear of being stranded.

The importance of sustainability is in maintaining or improving reliability
Passengers do not want to see punctuality or reliability getting worse, but they accept that sustainability may be a more important priority for improvement. The component of sustainability that most passengers would prioritise is resilience to weather events, which is directly linked to service performance. There is less of a consensus on other elements of sustainability such as the 'circular economy' or biodiversity, although passengers do feel that Network Rail should minimise the impact of its own activities by, for example, committing to net zero in terms of carbon emissions.

Passenger safety need not be an important priority for improvement
Passengers see the railway as a very safe mode of transport. Safety in the operational sense is not a priority for improvement, but passengers want unambiguous reassurance that safety will not be compromised. Furthermore, personal safety is often of higher salience than concerns about the safety of the railway per se.

Questions

Should we be doing more to improve accessibility at our stations?

There are different perceptions of accessibility, primarily based on individual passenger experience. Those without additional accessibility needs tended to see existing provision as sufficient. For those with additional needs, improvements to accessibility would be welcomed. Stakeholders tend to place a higher priority on accessibility than passengers.

"When they do upgrades and safety work, it's always been on a weekend which is a bit of a dread for those who use it for leisure. Now there's an implication that they might be doing it during the week more because less people are travelling for work. As long as you provide a backup service to replace it and you're well informed before booking, it works. Everyone accepts that work needs to be done but it's about communication."

Commuter, current, longer distance

How can Network Rail improve maintenance, repair and renewal?

Reliability, and broader resilience of the railway, were agreed to be key objectives for Network Rail. In this context, maintaining existing infrastructure was seen as more important than new projects.

When is the 'least bad' time for engineering works?

There is no clear consensus on the 'least bad' time for planned engineering works. Passengers mostly accept that working and journey patterns have probably changed for good, and that many more people can now work from home. We showed phase two research passengers the current order of priority for works, as follows:
- midweek nights for routine maintenance
- weekends and weekend nights for renewals
- bank holidays and half-terms and for more significant works
- Easter and Christmas for major works.

Despite acknowledging changing travel patterns, most are reluctant to alter these priorities. There is similarly no consensus about whether extended closures are better than shorter but repeated closures. In line with previous research, when works are imminent, passengers want transparency and good communication. In particular, they want to have advance notice of works so that they can plan their journeys.

Conclusions

Overall, passengers have endorsed Network Rail Wales and Western region's plans for CP7 as being in line with their priorities and expectations – although funding constraints may mean that Network Rail is unable to deliver to quite the extent that passengers desire.

The two-phase research methodology has been of great value not only in validating the findings of phase one but also in evaluating the plans, hypotheses and outstanding questions derived from these findings. We can feel confident that the business plan for CP7 is on the right lines, as far as passengers are concerned.

It is important to involve passengers and other stakeholders so that the plans take their needs into consideration, but it also sends a positive message to passengers that Network Rail is listening to them.

However, a note of caution: in interpreting these results, it is worth noting that there may be a 'research effect' at work. Passengers are not usually particularly engaged with Network Rail, nor do they spend much time thinking about the issues we raised with them. Purely by virtue of taking part in the research, these participants have thought more deeply about the issues and, as a result, may give different, more considered answers than might be the case if passengers at a station were asked for their view.

This reinforces the point that it will be important to communicate the plan and the rationale behind it as often and as clearly as possible if the general public are to accept and understand the approach that Network Rail will be taking in CP7.

Methodology

Phase one: twelve two-hour online focus groups with a diverse cross-section of lapsed and current rail passengers, each with 6-7 participants, plus 10 in-depth interviews with disabled passengers conducted in October 2021.

User type	Location	Number of groups
Commuters into major cities using main line services	Cardiff	4
	Bristol	
	London, Paddington	
	Reading	
Regional service users	Non-London, longer-distance rail within the Wales and Western Region	4
Branch lines/feeder services within Wales and England	England	2
	Wales	2

Phase two: 20 in-depth interviews with a cross section of lapsed and current passengers conducted in March 2022.

User type	Number of interviews
Commuters into major cities using main line services	7
Regional service users	6
Branch lines/feeder services within Wales and England	7

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Transport Focus is the operating
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