



Network Rail Wales and Western Research
Stage two
Prepared for Transport Focus

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Background and Research Objectives

Network Rail's Wales and Western Region is devising its Business Plan to commence in 2024

- Network Rail identified an ambitious set of plans for CP6 (2019 to 2024) including:
 - Delivering Phase 2 of the Port Talbot resignalling scheme
 - A more “predict and prevent” approach to maintenance
 - Greater use of technology to boost efficiency and reduce cost
 - Implementing an environmental management system on a par with ISO14001
- Network Rail is committed to ensuring that the voice of the passenger is heard throughout its strategic processes. As a result, the region wishes to understand the views of current and potential rail users.
- The COVID-19 pandemic has had a significant impact on passenger expectations. During the pandemic itself, we found that cleanliness, ventilation, safety and technology have risen dramatically in perceived importance.
 - However, since the lifting of legal restrictions in mid-July, the industry’s thinking may need to adapt to a genuine “post-lockdown” future, rather than a previously hypothesised one.

Research was needed to understand passenger priorities for the Wales and Western region and what needs they will have during Control Period 7 (CP7) from 2024 onwards.

Phase I of the research, consisting of 12 on-line focus groups and 10 in depth interviews, was reported in November 2021

This document reports on Phase II, which consisted of 20 in-depth interviews with a selection of respondents who had participated in the first phase



Research objectives

Phase I: The main goal of this research was to inform the development of Network Rail Wales & Western Region's Business Plan for CP7.

- What do passengers understand about the role of Network Rail
- Identify, and understand passenger priorities and how they trade-off between different priorities
- What do passengers see as the role for Network Rail meeting environmental targets?
- How has the pandemic impacted passengers' experiences and perceptions
- What do passengers identify as the strengths, weaknesses and pain points of rail service in the region

Phase II: The aim here was to focus on draft concepts for the CP7 Business Plan developed following the initial phase of research

- Gauge reactions to Network Rail's high-level plans
- Validate Network Rail's thinking around passenger and stakeholder priorities
- Test Network Rail's hypotheses around a number of key themes (punctuality & reliability, sustainability, accessibility, safety, maintenance & renewal and timing of planned engineering works)

The research was conducted in two phases: this debrief provides findings from phase II which consisted on 20 in-depth interviews recruited from our focus group attendees

Phase I: Two-hour on-line focus groups with a diverse cross-section of lapsed and current rail passengers

Plus 10 in-depth interviews with those with additional needs

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 travel within the Wales and Western Region	4
Branch Lines / Feeder Services within Wales and England	England	2
	Wales	2

Phase II: 20 in-depth interviews with a cross section of lapsed and current passengers

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



Summary & conclusions

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Encouragingly, passengers give Network Rail's priorities and plans a very positive endorsement overall

Passengers largely understood and agreed with the issues informing the context for Network Rail's plans

They agree that Network Rail will have to adapt to new conditions going forward, but there is not a clear consensus on the long-term impacts of the pandemic. However, passengers do accept that new working patterns are here to stay and that the challenge of climate change is real and urgent

The summary of passenger priorities identified from Phase I of the research was seen as accurate and in broadly the correct order. However, there are 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 accessibility (particularly for those with accessibility challenges) was sometimes seen as a higher priority

Consultation with wider stakeholders was seen as a valuable exercise, and stakeholder priorities were seen as broadly consistent with passengers' views

Most felt that the right issues were covered in broadly the correct order of priority. In particular, the top tier issues were thought to be about right

Network Rail's hypotheses were largely confirmed:

- Passengers for the most part agree that **punctuality and reliability are sufficiently strong** in Wales & Western and that **cancellations are more disruptive than delays**
- Passengers do not want to see **performance standards slip** but they do accept that **sustainability may be a more 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 higher salience** than concerns about the safety of rail per se
- **There are different perceptions of accessibility**, primarily based on individual passenger experience. Those without accessibility needs tended to see existing provision as sufficient. For those with additional needs, improvements to accessibility would be welcomed
- **Reliability, and underpinning this resilience, were agreed to be key objectives** for Network Rail. In this context, **maintaining existing infrastructure was seen as more important than new projects**

There is no clear consensus on the 'least bad' time for planned engineering works

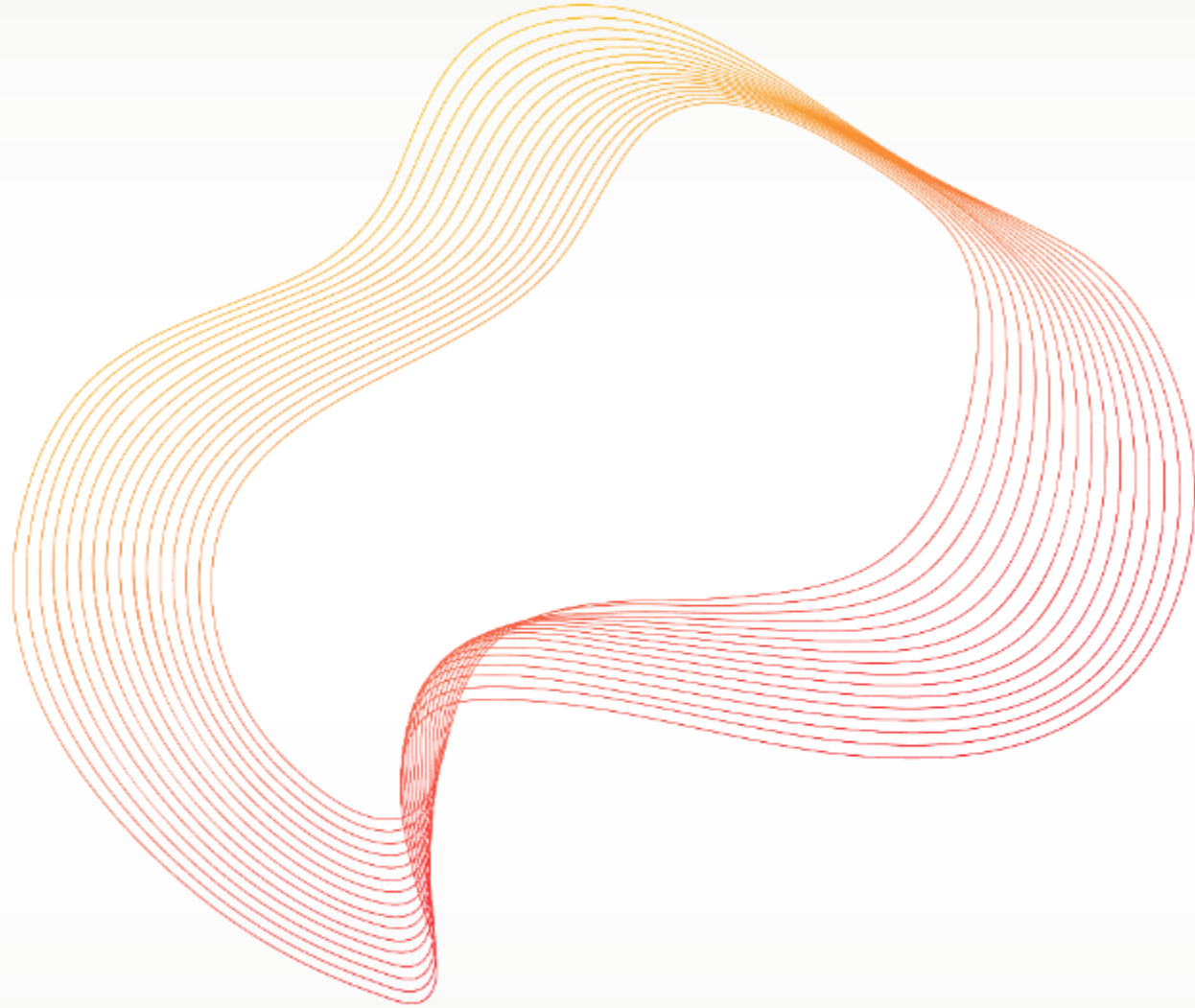
Passengers mostly accept that working and journey patterns have probably changed for good. However, **on balance, a majority are reluctant to change the existing order of priority**. There is similarly no consensus about whether extended closures were better than shorter but repeated closures

In interpreting these results, it is worth remembering that there is a research effect at work

As intended, respondents included in this phase of the research are a more engaged audience than the 'average' passenger, having already taken part in the initial focus groups and therefore able to give us a more informed perspective on the draft concepts for the CP7 Business Plan. A more general audience would certainly be less knowledgeable about what Network Rail is (and isn't) responsible for and likely more sceptical about its motives.



Research Findings



Context for Network Rail's plans

By design, our respondents are a more engaged audience than the 'average' passenger

Having participated in the previous phase of research, our respondents were somewhat better informed about the scope (and perhaps more importantly) the limits of Network Rail's remit

That said, it is still difficult for respondents not to evaluate their experiences of the railway holistically, without much concern about exactly who might be responsible for what

Passengers were pleased and sometimes surprised to be asked to review Network Rail's plans

In and of itself, the exercise was seen as demonstrating that Network Rail was sincere and serious about considering passengers' needs when developing its plans

This helped overcome much of the cynicism or indifference that respondents often default to when thinking about the railway's motives or commitments

However, this general willingness to give Network Rail the benefit of the doubt will inevitably be harder to achieve with a wider audience

Some of the stuff I was told that I thought, 'Oh, yeah, I didn't know that.' There's these assumptions we make. We want to catch a train, but there is all this stuff happening. The whole operation. I think I have a bit more understanding.

Regional, Leisure, Current

I really like that they're listening to the passengers and the expert groups - it's really good and positive.

Commuter, Lapsed, Longer Distance

Context for Network Rail's plan for Wales & Western Region (2024-2029)

- The **pandemic** has put a large strain on the public purse and this will need to be recovered over the coming years. With revenue from train ticket sales unlikely to fully return to pre-Covid levels, Network Rail's plans for 2024-2029 need to be affordable and efficient. The focus will be on maintaining a safe and reliable railway, with additional investment focused on customers' and stakeholders' priorities.
- **Society** is changing. With hybrid working becoming the norm and leisure travel dominating rail use, amongst other things, Network Rail's plans need to consider when engineering works should be carried out to cause the least disruption.
- The **natural environment** is changing and the safety and performance risk from adverse weather is increasing. Network Rail needs to invest more to ensure its infrastructure is resilient to climate change.
- The railway industry is undergoing **reform** bringing Network Rail and the train operating companies closer together. Network Rail's plans need to consider where benefits and efficiencies can be gained from taking a whole industry approach.
- **Technology** is evolving and Network Rail needs to continue to invest in research and development to modernise how it maintains and renews the railway.
- The **Safety** of passengers and Network Rail's workforce remains paramount.

Passengers by and large agreed that these are important considerations

That said, some of these issues were seen as primarily internal or technical matters about which passengers are able to offer little comment

Reform of the railway industry is something that very few are aware of or understand. While a 'whole industry approach' sounds broadly positive, it is difficult for passengers to envisage what this might mean in practice

Similarly, keeping abreast of **technology** and **modernising** is seen as a relevant but largely generic point. It is argued that the same would apply to almost any organisation

Passengers are pleased to see a strong commitment to safety

As seen in the previous phase of research, safety of both passengers and staff has a strong emotional and moral component. Passengers are very sensitive to anything that might suggest that safety is being downgraded or compromised

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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

Tech is not just me being able to plug in and charge my phone or access the Wi-Fi, there are so many other things. For example, I should be able to go on my phone and check the route planner and see in four weeks' time when I want to go to London there will be some maintenance work going on.
Commuter, Lapsed, Longer Distance

The broader societal trends attracted more comment

Passengers accept that Network Rail will have to adapt to new conditions post-pandemic.

There is no clear consensus on the long-term impacts of the pandemic, but many suspect (notwithstanding the 'affordable and efficient' claim) that higher fares and/or reduced services are a likely result of falling revenues.

Some are resigned: they accept that the railway's business model has been fundamentally challenged and/or see the financial constraints on Network Rail as just another element of the wider 'cost of living crisis.' But for others, increased fares without some improvement in service will feel unjust.

An **affordable** railway (if it is possible) is seen as important in terms of value for money for existing passengers. But it is also argued that rail needs to be a financially attractive alternative for new passengers in support of wider environmental objectives.

There is more agreement that new working patterns are here to stay

This has been many passengers' personal experience. Passengers agree that it is important that Network Rail takes this into account in its plans. However, (as discussed in more detail later) many feel that there is not an obviously answer to the question of when to time engineering work.

The challenge of climate change is, with very few exceptions, accepted as real and increasingly urgent

Views on this issue are perhaps driven in part by the recent severe storms experienced in Wales and the West. In any case, it is seen as an appropriate and important issue for Network Rail to address.

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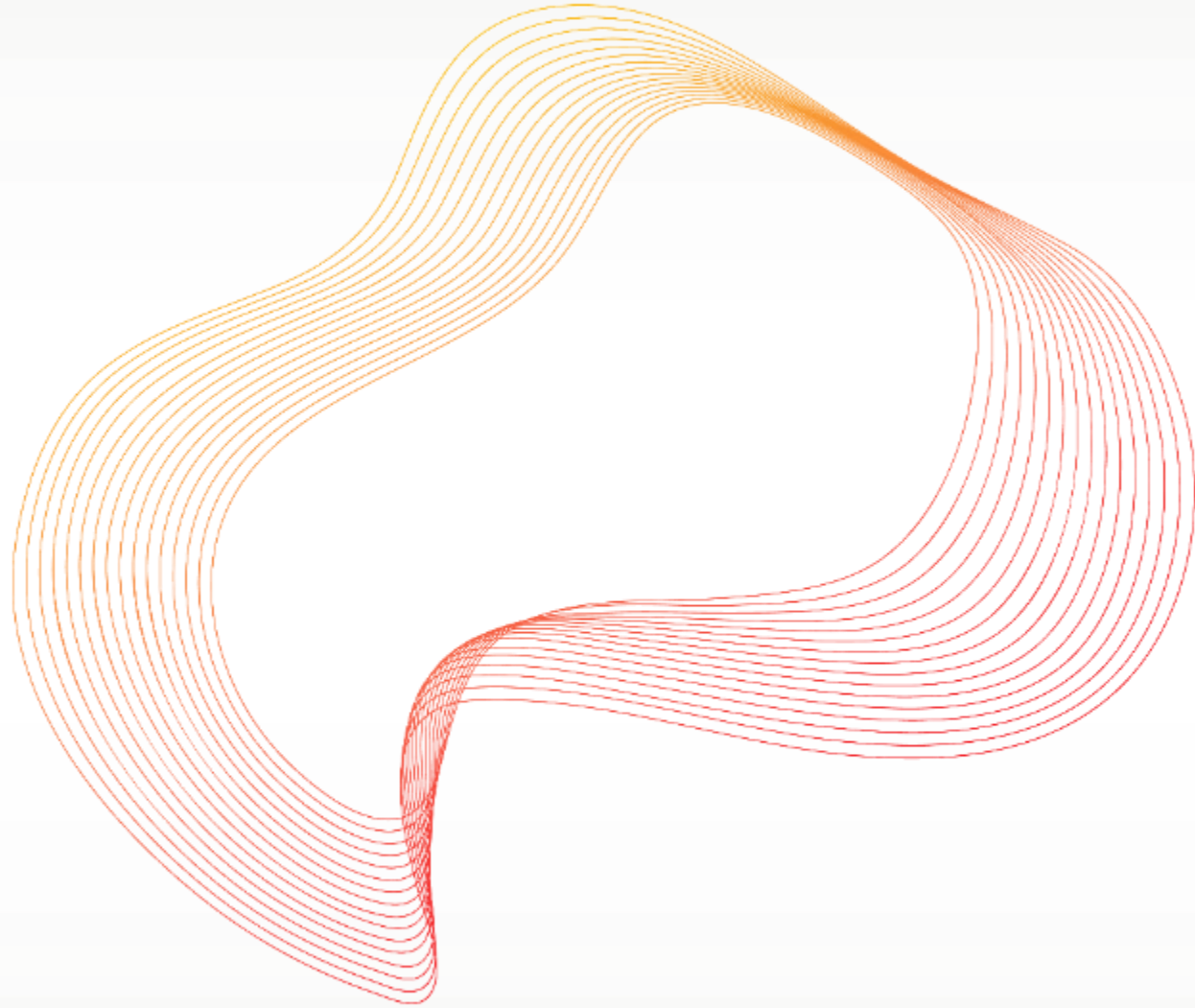
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- The **Safety** of passengers and Network Rail's workforce remains paramount.

We know the cost of living is so topical, so I appreciate things to have to go up, but I would also appreciate if there isn't a crazy spike in train prices.

Commuter, Lapsed, Longer Distance

Global warming is a very big thing and we've become more aware of it and how we are affecting our planet.

So it's corporate social responsibility really, isn't it?
Leisure, Current, Longer Distance

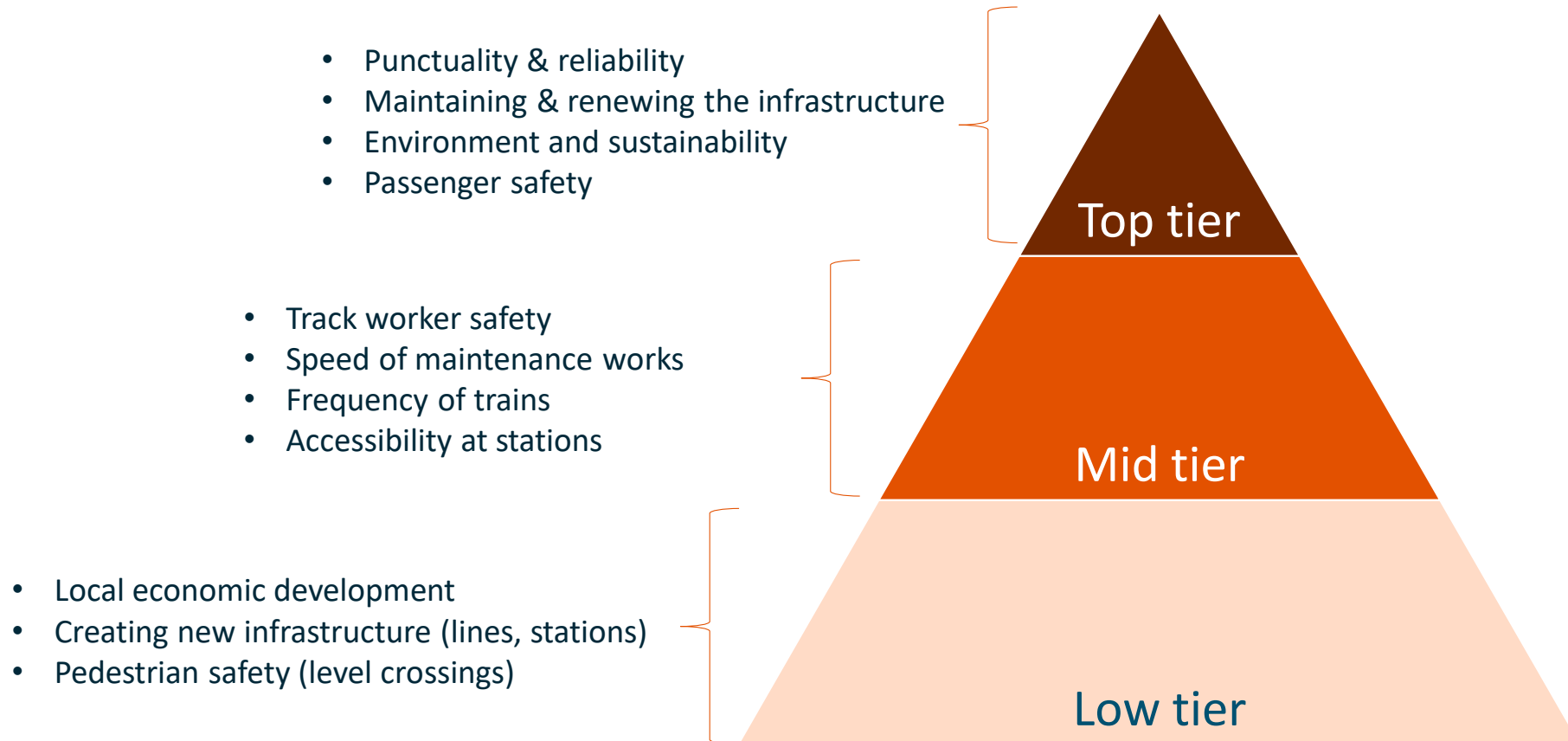


Evaluation of Network Rail proposals

We played back to passengers a summary of the priorities identified in the Phase I focus groups (below)

SHOWCARD 2

Passenger priorities



There was broad agreement that the summary provided a fair reflection of passenger priorities

Overall, passengers thought that the list captured the full range of priorities and that the hierarchy was broadly correct

There was little disagreement about the top tier issues

All of these were seen as key issues, albeit there is some debate about what should be covered under the 'environment and sustainability' heading. (Discussed in more detail later)

However, there are some areas of contention

Some take an 'absolutist' stance on safety, arguing that all aspects of safety should be top tier. These passengers don't think that the Railway is inherently unsafe, but they are reluctant to appear to give Network Rail 'permission' to be in any way less safe. When understood specifically as priorities *for improvement*, most are more comfortable, but this is obviously an area that needs to be communicated carefully

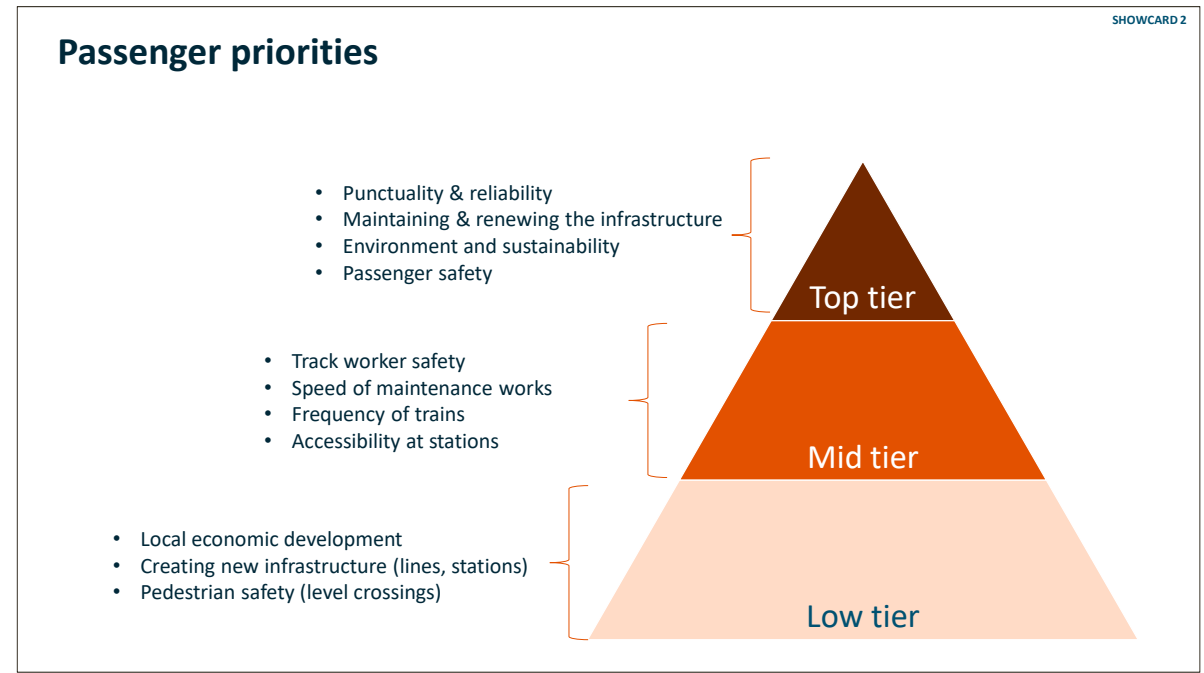
In addition, some concerns about personal safety (in stations, on trains etc.) do remain. That said, our respondents did think more about infrastructure issues than in the first phase of research

Some suggest that frequency of trains should be higher priority

This did not seem to be based on direct pre/post pandemic comparison, but some concerns were expressed about gaps in service outside of peak hours

Accessibility was sometimes seen as a higher priority, typically by those who had accessibility issues

e.g. self or family with mobility challenges, those travelling with young children etc.



Punctuality, reliability and frequency of rail services should remain good. If anything, it could be better. In my eyes, there's always room for improvement.
Commuter, Current, Shorter Distance

When thinking about accessibility, you have to take into consideration parents as well, who may have young ones in pushchairs. I've gotten on and there was nowhere for me to sit, people were taking seats up with bags or they would refuse to move up.
Leisure, Current, Shorter Distance

Consultation with wider stakeholders was seen as a valuable exercise, although passengers were mostly vague about who should be included

Few had given much consideration as to what might constitute a stakeholder (other than passengers), but the principle of consulting more widely was supported

Again this was seen as evidence of Network Rail following good practice as a responsible organisation

Respondents had few suggestions as to who might/ought to be included in the exercise but 'business' generically was mentioned

The list of stakeholders consulted was generally agreed to be appropriate although the relevance of some was more obvious than others

Other rail users (freight operators/end-users, TOCs and user groups) were readily understood as stakeholders, as were Local Transport Authorities

Some were surprised at the inclusion of public bodies (Local Authorities, Welsh Government). The role of government in rail is unclear for most passengers, but their involvement as representatives of their local communities was seen as making sense

None of our respondents were aware of Local Enterprise Partnerships, but input from the business community was thought sensible

In sum, our passengers agreed with the concept of stakeholder dialogue and were largely prepared to trust that Network Rail would have talked to the 'right people'

STAKEHOLDERS CONSULTED

- Local Authorities
- Local Transport Authorities
- Local Enterprise Partnerships (partnerships between local authorities and local businesses to promote economic growth and create jobs) and other business groups
- Welsh Government
- Passenger Train Operating Companies
- Freight Train Operating Companies
- Rail Freight End Users (i.e. businesses receiving goods and materials via rail freight such as foodstuffs for supermarkets, raw materials for different industries, cars for import/ export etc.)
- Rail user groups

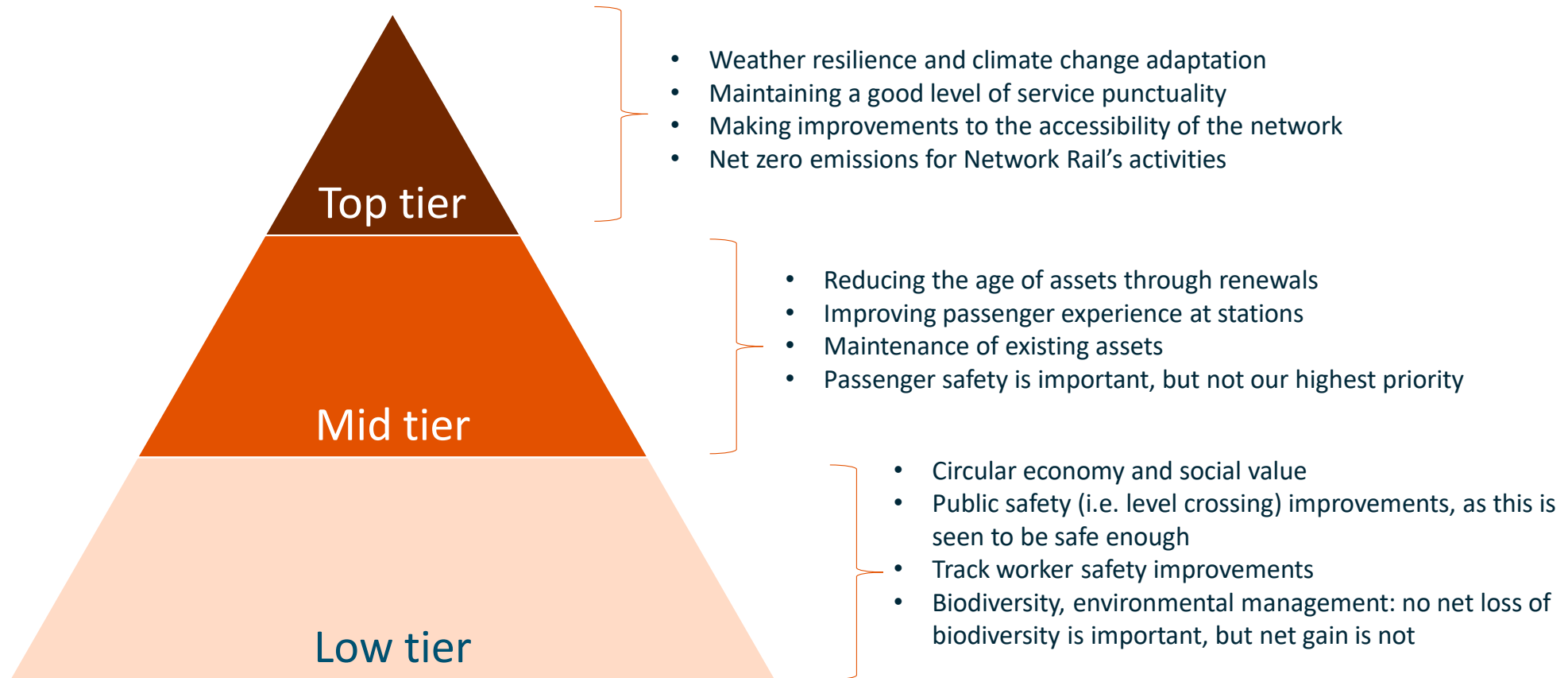
I think it's good that stakeholders were consulted. It's inclusive. They're not just listening to one group; they've gone to other people or other companies which makes complete sense.

Commuter, Lapsed, Longer Distance

We explained to passengers that Network Rail held nine stakeholder workshops, with the slide below summarising the priorities of stakeholders.

SHOWCARD 4

Stakeholder priorities



The wider stakeholder priorities were seen as broadly consistent with passengers' views

Reactions were similar to views on the Passenger Priorities list

Most felt that the right issues were covered and the order of priority was, for the most part, reasonable

The list was felt to be broadly consistent with passenger priorities, albeit given more detail. Passengers generally supported the idea of Network Rail consulting widely and accepted that the consolidated view would not be exactly the same as the purely passenger view

Most of the top tier issues were though to be about right

Punctuality is seen as an obvious key priority. The more explicit articulation of **environmental commitments** (weather resilience and net zero) was also generally supported.

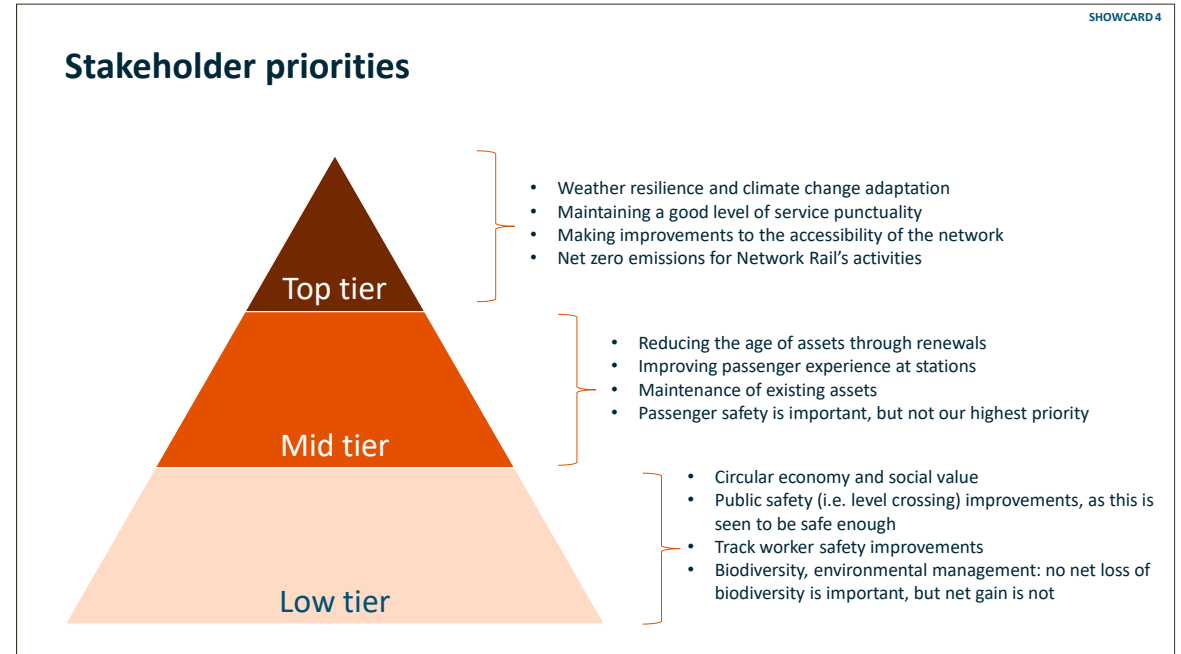
Again, views on **accessibility** were more mixed. Many feel it is good enough or concede that they have not given it much thought, while for others, it is a 'hot button' issue

Similarly, the positioning of **safety issues** causes some debate. On reflection, most accept that the railway can be safe without safety being a major priority for improvement, but not all are entirely comfortable with this

In comparing passenger and stakeholder priorities, respondents thought that **improving the passenger experience at stations** would come under the 'maintain and renew infrastructure' heading that passengers had as a top tier priority, but there was broad support for it as a mid-tier priority in its own right. This was also seen as potentially mitigating personal safety concerns

There was little disagreement that **circular economy and social value** was a lower tier issue. As seen in the previous phase, passengers often find these concepts somewhat nebulous, even if they are seen to be broadly the right thing to do.

Most were comfortable with **biodiversity** as a low tier priority. With some exceptions, passengers tended to see this as much more peripheral to Network Rail's perceived remit than weather resilience and net zero.



There are no surprises. It's what you expect from both sides. The passenger will think more about themselves, their experience and what they expect. It's nice to see that punctuality and reliability are key for both customers and stakeholders. I think that's the biggest bugbear that passengers have.

Leisure, Current, Longer Distance

When I worked on the railway, the safety was top notch so I would put it as 'low tier' because everyone's clued up, they've done exams to get on the rail. If you're working on the railway, you know what your safety is.

Leisure, Lapsed, Shorter Distance

We explained that this was an outline of how Network Rail intends to reflect stakeholder (including passenger) priorities in its plans

SHOWCARD 6

Network Rail's aims

- Network Rail aims to offer for passengers, freight and funders a railway which is:

Affordable: real ambition for efficiency, working to develop detail behind the assumptions

Resilient: improving network resilience to weather and climate change

Responsible: enabling transition to net zero for our activities

Safe: maintaining safety

Reliable: delivering a good level of train service performance: significant work required on whole system performance

Network Rail's aims receive a very positive endorsement overall

Passengers are pleased to see affordability appear prominently

But there is still some scepticism about what will happen to fares in an era of falling revenue and rising inflation. Again, affordability is also seen as important in support of wider environmental goals by ensuring that the railway is an attractive alternative to car use

Improving resilience is seen as non-negotiable

Increased adverse weather events because of climate change is largely an accepted fact. Improved resilience is seen as vital to underpin reliability

Net zero is a worthwhile goal

Rail travel is seen as 'green' in its own right but passengers also expect Network Rail (like any other large organisation) to behave responsibly in terms of its own activities

Making an unambiguous statement on safety is reassuring

Reliability is the fundamental yardstick with which Network Rail will be measured

Ultimately Network Rail has to continue to get the fundamentals right

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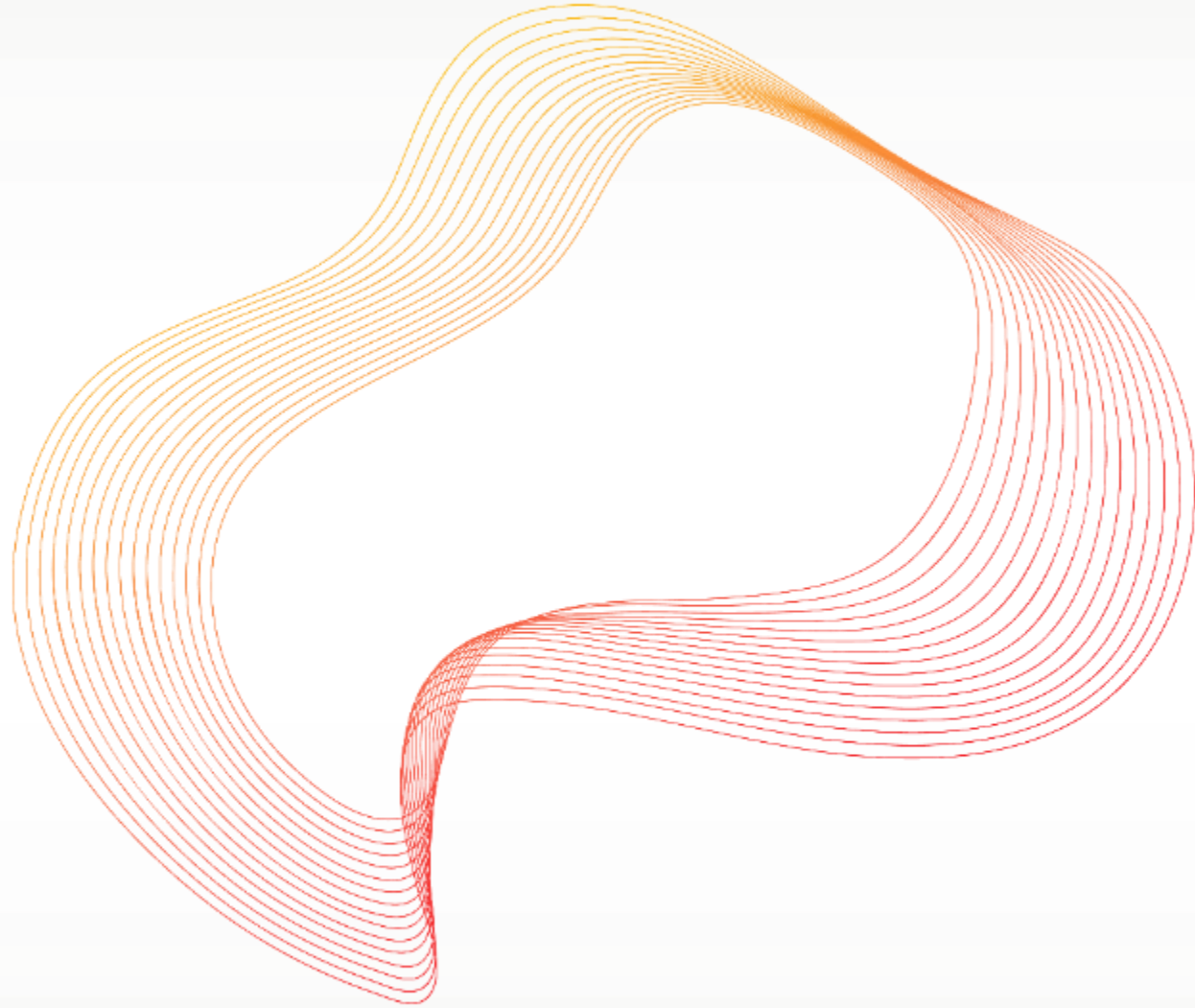
Responsible: enabling transition to net zero for our activities

Safe: maintaining safety

Reliable: delivering a good level of train service performance: significant work required on whole system performance

For me, I want to see actual change. For example, I have a diesel guzzler and I've moved to electric. Therefore, I've done my bit – it's the same for the trains. Commuter, Lapsed, Longer Distance

With fuel and home bills going up, we need to think that we're receiving a good deal and that it's not going to be too expensive or even go up more. Commuter, Lapsed, Shorter Distance



Testing hypotheses

We tested a number of specific hypotheses that emerged from the first phase of research

Is punctuality and reliability 'good enough' as it stands?

Punctuality, reliability, and frequency are sufficiently strong in Wales & Western, however they shouldn't worsen.



This is largely endorsed

There is a spread of opinion about reliability and many individuals have their own 'horror story' but the service is not seen as fundamentally unreliable at present

Should Network Rail ensure that punctuality, reliability, and frequency of rail services are as good as they are right now, or should the comparison be pre-pandemic levels?



Passenger struggle to provide a clear answer to this

Even now many passengers' use of the railway is significantly less than it was and/or their usage patterns are very different. As such, few are able to make like on like comparisons of reliability frequency etc.

Network Rail believes that it should prioritise avoiding cancellations, even if this sometimes means trains are delayed.



Cancellations are agreed to be more disruptive than delays

Delays can be deeply frustrating but passengers feel they can be usually be coped with. They stretch out the journey but one will reach one's destination eventually. Cancellations feel more serious and present potentially more disastrous consequences of being stranded

How big a priority is sustainability, especially when set against other goals?

How important do you think it is that the rail industry should prioritise a more sustainable and 'green' railway?



Again this is largely endorsed

The reality of climate change is recognised and improved resilience is seen as essential to support reliability. This is the key component of sustainability for passengers but they also believe the railway needs to be sustainable in a wider sense.

Which elements of environment & sustainability do you feel are most important?



Resilience is the priority for many, but Network Rail is also expected to behave responsibly

Improved resilience is prioritised by most passengers as it is directly linked to service performance. There is also general agreement that Network Rail should strive to minimise the impact of its own activities e.g. via net zero. There is more disagreement about other green initiatives (circular economy, biodiversity, social value). Passengers are less clear about how Network Rail can impact these areas and for some, they seem peripheral and initiatives such as tree planting can be perceived as tokenistic. Others argue that in *all* its activities, Network Rail should be striving for better environmental outcomes*

Addressing environmental issues and sustainability is a more important priority for improvement than punctuality and performance.



On balance this is accepted

As already noted, in terms of sustainability resilience is prioritised and to this extent a sustainable network is a reliable network. Passengers also expect a large organisation like Network Rail to 'do the right thing' for the environment. As per the first phase of the research, passengers do not want to see performance standards slip but they do accept that sustainability may be a more important priority for *improvement*

*A news story about Network Rail investment in flood protection for the Cambrian Line was shown in some of the interviews. This was generally agreed to be a good example of appropriate spending on resilience. By contrast, a story about Network Rail spending £1m on planting trees met with a more mixed response. While some approved, others saw the scheme as of limited relevance to Network Rail's activities and even as 'green washing.'

https://www.bbc.co.uk/news/uk-england-60693721?at_medium=RSS

<https://news.railbusinessdaily.com/cambrian-line-to-open-soon-with-millions-pledged-to-prevent-storm-damage/>

What do passengers mean by 'safety' and it is a priority for improvement?

When you think about passenger safety what comes to mind?



Personal safety is often higher salience than concerns about the safety of rail *per se*

First thoughts often turn to anti-social behaviour or perceived unsafe environments on trains or in stations when safety is mentioned. That said, in these interviews passengers were somewhat more focussed on safety in terms of the operation of the railway. As noted earlier, our respondents are a more engaged audience than the 'average' passenger so there is some degree of research effect at work here.

Passenger safety should not be an important priority for improvement?



Passengers do in general agree with this, but the issue needs careful explanation

Passengers see the railway as a very safe mode of transport. They also largely assume (but are not entirely certain) that the railway's operations in terms of things like track work and level crossings are conducted safely. Safety in this sense is not a priority for *improvement* but passengers want unambiguous reassurance that safety will not be compromised for any group (passengers, workers, pedestrians)

How important is accessibility and is this the same for everyone?

Should we be doing more to improve accessibility at our stations? For those with specific access requirements, is our infrastructure accessible?



There are different perceptions of accessibility, primarily based on individual passenger experience

Those without accessibility needs tended to see existing provision for accessibility as sufficient (or to concede that they weren't in a position to provide an informed opinion). For those with additional needs (for themselves or family members) accessibility can be a problem. The most common problems mentioned were difficulties getting around stations or on and off trains and the additional stress this could cause. For these passengers, improvements to accessibility would be welcomed

Other stakeholders tended to place more priority on accessibility than passengers. Why do you think this might be?



It was not always obvious to passengers why accessibility was a higher priority for other stakeholders

However, on reflection, most could see why bodies such as Local Authorities or the Welsh government that represent wider community interests might identify this as a greater priority than many passengers

Maintenance and renewals appear as high priorities for passengers, but what are their expectations in this respect?

Maintaining and renewing the railway is something requiring significant improvement. How could Network Rail improve in this respect?



This is seen as Network Rail's core mission and as such, something that should always be high priority

Reliability, and underpinning this resilience, were typically seen as key objectives for Network Rail and as being premised on engineering 'best practice' as regards repairs and renewals. Passengers expect Network Rail to be efficient and make the right calls about what to do and when to do it.

Passengers are able to provide few concrete suggestions as to how the railway could improve, but take cues from what Network Rail itself has shared – using new technology, investing in R&D, focusing on efficiency etc.

Do you want to see new infrastructure prioritised over the next five years even if it means other priorities might not see as much attention?



Maintaining existing infrastructure was seen as more important than new projects

Few see the need for significant new infrastructure, particularly if this is at the expense of other priorities. Passengers were supportive of Network Rail's aims for resilience, efficiency and reliability, but these are seen as better supported through investment in existing, rather than entirely new infrastructure

There is no clear consensus on the 'least bad' time for planned engineering works

Passengers mostly accept that working and therefore journey patterns have probably changed for good

They also tend to agree that many more people can now work from home if they need/want to (even if they don't typically choose to). It is also argued that many people who have to use the train to get to work don't always travel during peak/week day periods (e.g. shift workers, emergency workers, those in retail, hospitality etc.). In addition, those who travel primarily for leisure understand that they might personally benefit from an approach to timing engineering works that deprioritised commuters

As such, many can see an argument for changing the timing of planned engineering works

However, on balance, a majority are reluctant to change the existing order of priority. Even if sub-optimum on a personal basis, getting to and from work is seen as more important than elective journeys. It is also thought that on days when commuters do go into the office (even if not every day) they will do so during conventional peak times

There is similarly no consensus about whether extended closures were better than shorter but repeated closures

Most passengers could see benefits and drawbacks for both options but not a compelling argument for either one. A few did suggest that an extended closure might be more efficient as it would involve setting up plant and machinery only once rather than several times.

Ultimately, passengers think that Network Rail needs to identify the optimum approach from both an engineering and customer disruption perspective.

Passengers also stress that key to managing any planned disruption is providing timely advanced information and the best possible mitigations in terms of alternative travel arrangements

Previously engineering works have been undertaken during 'off-peak' periods to minimise disruption for commuter traffic. The general order of priority has been:

- 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*

With many more people working from home and fewer people commuting every day, leisure travel is accounting for a bigger share of rail journeys. Taking this into account, does the approach to timing of engineering work shown here still seem right?

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



Conclusions

Summary & conclusions

Encouragingly, passengers give Network Rail's priorities and plans a very positive endorsement overall

Passengers largely understood and agreed with the issues informing the context for Network Rail's plans

They agree that Network Rail will have to adapt to new conditions going forward, but there is not a clear consensus on the long-term impacts of the pandemic. However, passengers do accept that new working patterns are here to stay and that the challenge of climate change is real and urgent

The summary of passenger priorities identified from Phase I of the research was seen as accurate and in broadly the correct order. However, there are 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 accessibility (particularly for those with accessibility challenges) was sometimes seen as a higher priority

Consultation with wider stakeholders was seen as a valuable exercise, and stakeholder priorities were seen as broadly consistent with passengers' views

Most felt that the right issues were covered in broadly the correct order of priority. In particular, the top tier issues were thought to be about right

Network Rail's hypotheses were largely confirmed:

- Passengers for the most part agree that **punctuality and reliability are sufficiently strong** in Wales & Western and that **cancellations are more disruptive than delays**
- Passengers do not want to see **performance standards slip** but they do accept that **sustainability may be a more 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 higher salience** than concerns about the safety of rail per se
- **There are different perceptions of accessibility**, primarily based on individual passenger experience. Those without accessibility needs tended to see existing provision as sufficient. For those with additional needs, improvements to accessibility would be welcomed
- **Reliability, and underpinning this resilience, were agreed to be key objectives** for Network Rail. In this context, **maintaining existing infrastructure was seen as more important than new projects**

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. However, **on balance, a majority are reluctant to change the existing order of priority**. There is similarly no consensus about whether extended closures were better than shorter but repeated closures

In interpreting these results, it is worth remembering that there is a research effect at work

As intended, respondents included in this phase of the research are a more engaged audience than the 'average' passenger, having already taken part in the initial focus groups and therefore able to give us a more informed perspective on the draft concepts for the CP7 Business Plan. A more general audience would certainly be less knowledgeable about what Network Rail is (and isn't) responsible for and likely more sceptical about its motives.



Network Rail Wales and Western Research
Stage II
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