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Network Rail Wales and Western Research
Stage one
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 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 is 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.

The research objectives can be divided into two broad themes

Deliberative Objectives

– Identify, and understand the concrete definitions of high-level priorities that the public have for the routes.

– Understand whether and how passengers consider trade-offs between, for instance, frequency and punctuality.

– How will passengers judge whether the 2024 plan is being met? What are their key performance indicators?

– What do passengers understand the role of Network Rail to be, and what do they see as the ideal balance between Network Rail, Government and TOCs in terms of responsibility for service delivery?

– What are passengers' expectations and preferences for maintenance work and how it is scheduled?

– What do passengers see as the role for Network Rail and the industry in general for helping the nation meet governmental environmental targets?

Experiential Objectives

– What have passengers' experiences been of the routes since the pandemic? What do potential users expect the experience to be like?

– How has the pandemic impacted passengers' experiences and perceptions towards rail travel in general, and the Wales and Western routes in particular?

– What are some of the pain points in passengers' experiences of the routes, and what would they most like to see changed?

– How do experiences differ between the two routes in the Region?

For all, how does this differ by different demographic groups (e.g. gender, age, ethnicity)

This report incorporates findings from our 12 focus groups with rail users in the Wales and Western Region

User Type	Location	Current User?	Distance
Commuters into Major Cities using Main Line Services	Cardiff	Current	Longer
	Bristol	Lapsed	Shorter
	London Paddington	Lapsed	Longer
	Reading	Current	Shorter
Regional Service Users	Non-London, longer-distance rail travel within the Wales and Western Region	Current	Longer
		Lapsed	Longer
		Current	Shorter
		Lapsed	Shorter
Branch Lines / Feeder Services within Wales and England	England	Current	Longer/Shorter
		Lapsed	
	Wales	Current	
		Lapsed	

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Executive Summary

Executive Summary

Passengers approach Network Rail's strategic priorities from a position of limited understanding

Even when explained, passengers do not know to whom to ascribe specific failings or successes - to train operators, Network Rail, government, or any other related organisation. But while it is unclear to many what Network Rail's specific remit is, Network Rail is seen as an important organisation. Network Rail is readily visible, and seen as being in a position of authority over national rail services. **Many therefore conclude that whatever Network Rail does, it must be done well;** efficient, cost-saving and data-driven decision-making are all expected, and maintaining and improving on this would be a desirable aspect of CP7.

The key message from most passengers is for Network Rail to focus on the fundamentals

The pandemic, changes in working patterns and the rise of sustainability in public consciousness have not fundamentally altered the key performance indicators of the rail network in Wales and Western. Punctuality, reliability and capacity still dominate passenger assessments of what makes for a good service.

However, value for money has become a more pressing concern. Passengers fear that COVID-19 will leave a legacy of diminished and worse-for-wear rail services, with higher ticket prices, and anything Network Rail can do to stem the issue would be valued. **Value for money is a holistic consideration:** tickets are not seen as cheap; for the prices these passengers pay, they will expect the whole service to perform well, from comfort, cleanliness and amenities to punctuality.

As a result, any 'worsening' of the network in Control Period 7 will be met with frustration – there is no easy solution, since passengers view the question of value for money so broadly. **However, the key metrics of punctuality and reliability are held sacrosanct and should not be allowed to deteriorate (if they cannot be improved).**

That said, passengers are willing to give Network Rail permission to think 'long-term' about broader, sustainable goals

In spite of the above, passengers tend not to think of their region as suffering from a lack of investment. Their worries are around how well the region is managed, rather than in terms of pounds and pence put into the system.
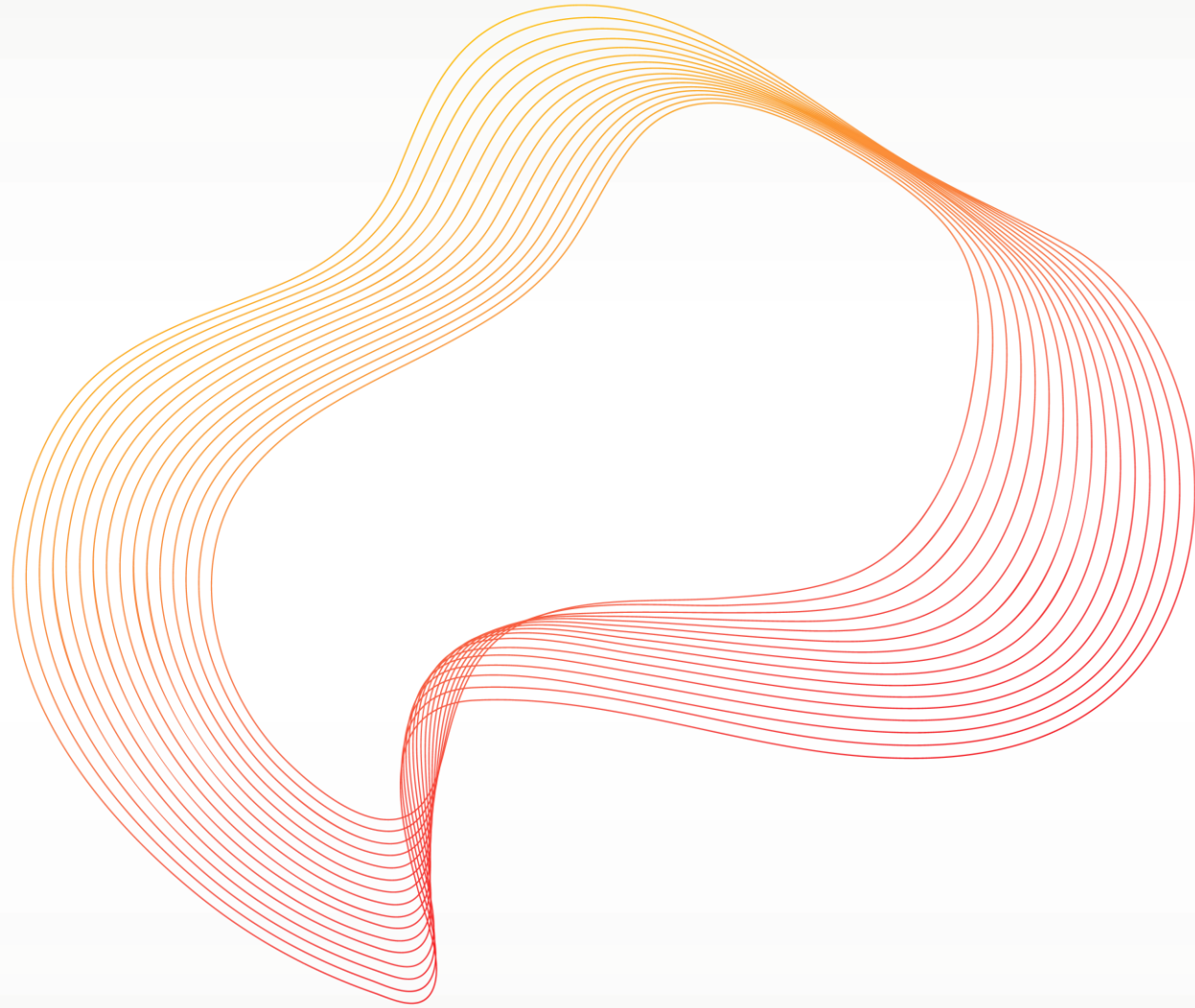
The research also suggests that passengers are willing to forgo 'quick wins' in terms of short-term improvements to reliability in the interest of supporting sustainability goals.

This needs to be understood in context. Passengers arrive at this view only once they have been provided with information about the role of Network Rail and been asked to consider how the organisation should decide between competing priorities. In an ideal world, passengers would like to see improvements in all aspects of Network Rail's performance. Moreover the focus on sustainability in this context is **primarily on resilience.** Many passengers conclude that **a sustainable network is a reliable network**; improvements to punctuality mean nothing if they cannot be maintained in the face of a worsening climate. This is not to say that passengers are unconcerned with sustainability beyond the question of resilience. Passengers **expect Network Rail to be** *at least* **as sustainable as what increasingly seems to be the norm among large companies**. But given all of the above, while passengers are not willing to see punctuality and reliability standards slip, they believe that ensuring resilience is equally important.

Qualitative Research Findings

Current Experience of Rail Travel

What makes the Wales and Western region 'different'?

In the main, the key distinction in passengers' minds is between London and 'the regions'

Few would argue that Wales and Western is fundamentally different to Eastern, North West and Central, Scotland or other non-London and South East regions.

Most feel that some branch or feeder lines within the region are less modern, primarily in terms of rolling stock, frequency of trains, and extent of the network. However, most concede that the level of service provided is commensurate with the region's needs.

That said, a handful of respondents felt that their homes were too far away from a train station, and modal integration is going to be a key priority for rural passengers in the area.

One point of difference is the extent of dispersed, rural communities around Wales and the West

Passengers recognise that there are rural peripheries in the region that may be under-served by the rail network. From a public-good standpoint, even urban commuters would not want to see their needs prioritised to the significant detriment of rural service users.

Another point of difference is the green space in the region. Passengers feel lucky to live in a region with appealing and beautiful landscapes and the idea of protecting them (or not actively 'building over them') came up spontaneously as a significant priority.

> *My experience is that you'd think Abergavenny to Cardiff would be a lovely journey, but it was hell; it was expensive, you could never get a seat. The lack of trains, and the lack of space on the trains...* ***The prices have gone up immensely, but we're not getting a better service.***
>
> Commuter, Cardiff, Longer Distance

> *For me it's the morning trains, between 8 and 10am they're just packed. There's not enough trains, you can't get a seat. It's manic and it hasn't improved. Between 8 and 10 they should put more trains on, and between 4 and 6. It's just manic.* ***They don't seem to want to do it and I don't know why.***
>
> Commuter, Bristol, Shorter Distance

Passengers are broadly satisfied, but there are underlying frustrations

There are complaints around capacity and crowding, as well as unreliability. Passengers may have 'horror stories' but the service is not seen as fundamentally unreliable.

Cost and value for money are the primary worries for most passengers
- Leisure users in particular believe that they are paying a 'premium' price but not receiving a premium service in journeys to rural destinations. Rolling stock can feel outdated, and the occasional lapse in punctuality or reliability can leave passengers feeling under-served and under-valued. Service across the region is seen as 'good enough' but passengers feel they are paying for more.

Users feel that there is a two-tier system in place: modern, effective urban services versus more 'neglected' rural services
- Again, however, rural service users are not fundamentally dissatisfied – they are able to plan around the lower frequency of service they experience. They experience cancellations and delays but usually build in a 'buffer' against them in their plans. **(Of course, many passengers' use of the railway has significantly reduced or even stopped altogether since the pandemic. As such, views on frequency may be based on experience of pre-pandemic service levels and/ or the fact that they are now making fewer journeys).**

- Branch/feeder and other less urban station users feel that their rolling stock is 'outdated' – the perceived difference between modern electric trains and diesel trains in rural areas is stark and clearly apparent.

- Longer distance users on the main line are broadly satisfied – the level of service they receive generally matches the high-stakes and higher-cost nature of the journeys, and there were fewer complaints around modernity of infrastructure or rolling stock.

Personal safety from a crime and antisocial behaviour standpoint have seen a significant rise in importance since 2020
- Female respondents in particular highlighted the importance of lighting, staffing and surveillance at stations, even at the larger stations that are managed and operated by Network Rail.

> *It was horrible enough as it is, being crammed into a train at the end of a work day but now I really don't feel comfortable being on something that **crowded.***
>
> Commuter, Bristol, Shorter Distance

> *I feel like the further West you go the more unreliable it gets. I'm fine getting from Bristol to Weymouth but past there it **just gets more and more unreliable, more likely to be late, or cancelled and you're waiting hours for the next one.***
>
> Regional Service User, Longer Distance

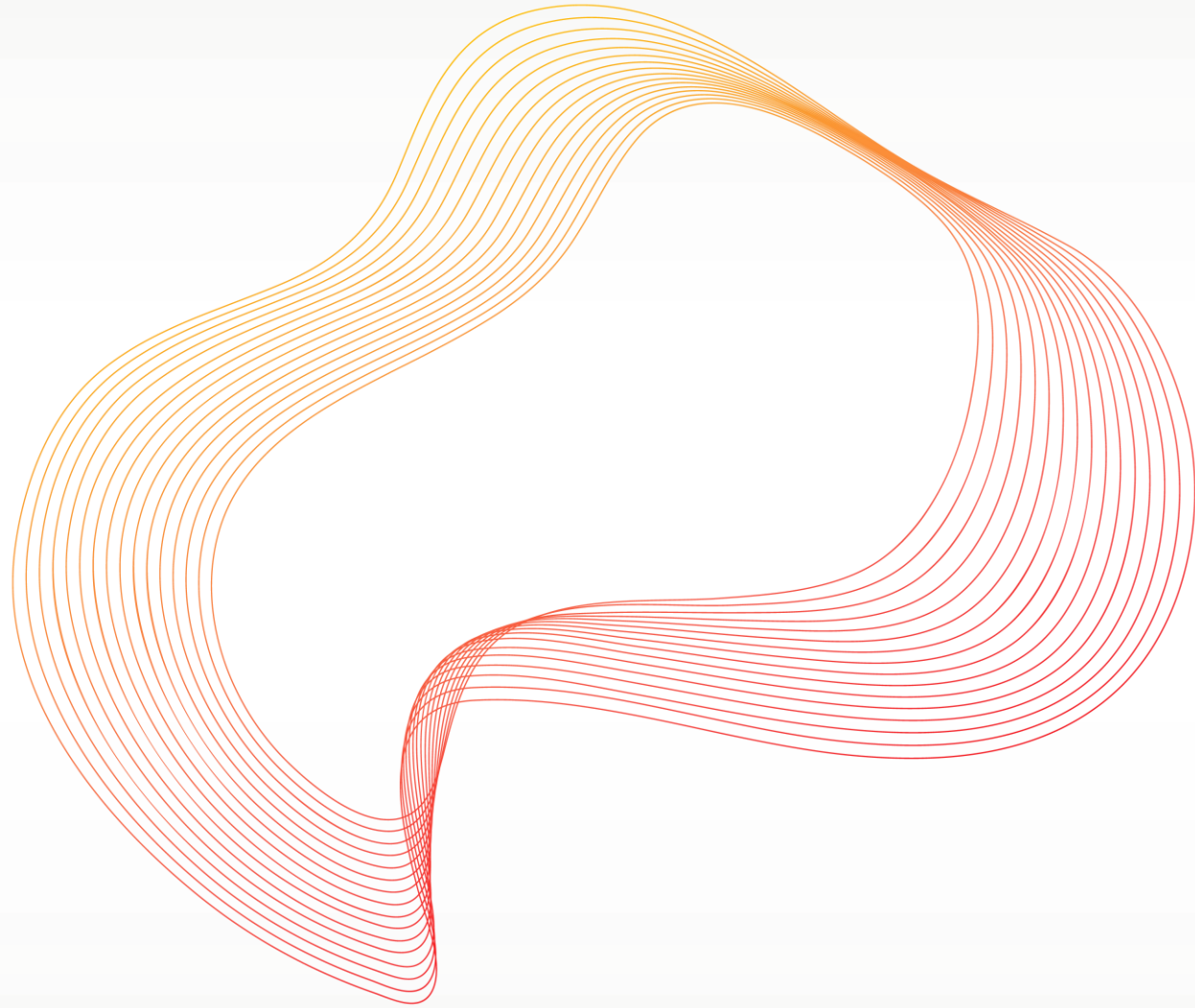# In line with previous research on rail services, passengers do not see the system as centrally managed or overseen

Wales & Western

Perhaps unsurprisingly, the 'Wales and Western Region' does not hold much meaning for its passengers – they do not see themselves as passengers within a managed, unified region. Indeed, their experiences of asking staff for help during periods of delay can leave some feeling that there is no local oversight at all. That said, they assume that Network Rail has some controlling interest as an organisation that must collaborate with all train operating companies using their infrastructure.

Further, passengers argue that the rail network is poorly integrated with road and bus, particularly around parking, pedestrian access to stations, and having a 'plan B' in the event of rail disruption. Most respondents had a story about being 'stranded' with no viable alternative in the event of severe delay.

*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?***
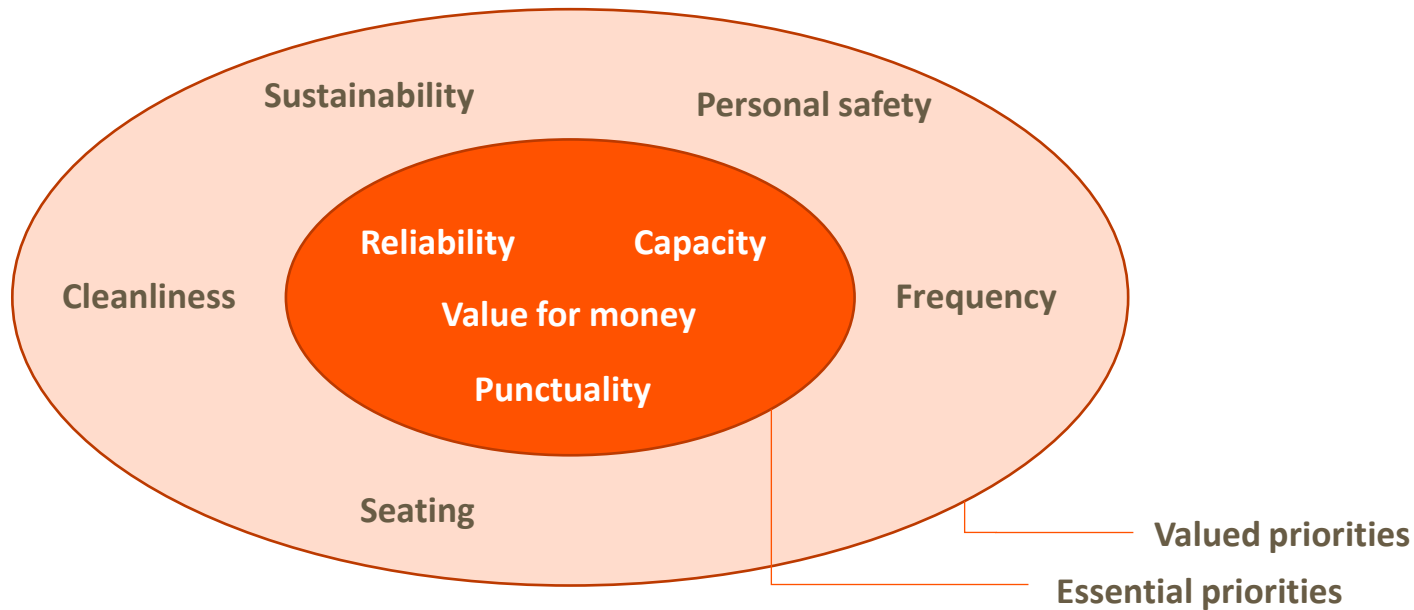
Regional Service User, Shorter Distance

Passengers' Immediate Priorities

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Passenger priorities for the next 12 months reflect their most immediate frustrations

Passenger attention is focussed primarily on the train operators

Again, with some lateral thought (of the sort unlikely to be undertaken by passengers who have not gone through our research process) they are willing to **work out** how Network Rail's performance could impact the network's wider performance. For instance, while passengers are frustrated about the lack of facilities at more remote stations from a personal safety perspective, Network Rail-managed and operated stations are by no means 'off the hook.' For the 25 stations that Network Rail *do run* they should be safe, clean, well-equipped and an exemplar to others.

Sustainability

Personal safety

Reliability   Capacity

Value for money

Punctuality

Cleanliness

Frequency

Seating

Valued priorities

Essential priorities

The core priorities for most passengers centre on reliability, capacity and punctuality. Value for money, however, can encompass a whole range of different needs depending on passenger type.

A leisure passenger making longer-distance journeys may consider personal comfort, seating and other amenities as part of their value for money consideration whereas a commuter may simply evaluate how often they were made late for work.

*It is crucial for passengers to feel that they are **getting what they pay for,** and this goes beyond simply the 'core' needs.*

Network Rail's 'ideal' short-term role, in the eyes of passengers, is as an enabler of train operator success

Passengers argue that Network Rail's infrastructure should be managed and operated in a way that *allows* train operators to operate a reliable service. Passengers are familiar with voices over the Tannoy 'blaming' Network Rail for a delay, and while *they* may not know who to blame, they certainly do not want the infrastructure to 'hold operators back.' They may be unaware of the influence that Network Rail infrastructure can have on capacity, but when made aware, they feel Network Rail should act in this interest as well.

Unlike previous research we have conducted, respondents appear to overestimate, rather than underestimate, Network Rail's remit

As a result, passengers can feel somewhat bereft when they realise that Network Rail's role is "only about the infrastructure"

The word 'governance' was common. There was a genuine and persistent assumption that Network Rail holds some kind of governance role over the rail system as a whole, able to pressure train operating companies and act as an advocate for the passenger. Learning that the remit is more focussed than this was disappointing, and led many to ask, "who do I complain to?" or "who is looking out for me as a passenger?"

This is, in part, due to the (perhaps correct) view that Network Rail is 'national' whereas train operating companies are 'local' – if the national rail organisation does not oversee the local train companies, who does? It speaks to a broader lack of understanding about the division of responsibilities between Network Rail and the train operating companies.

The role of government, either local or national, in the rail industry was highly unclear for respondents (including the role of the Welsh Government and Transport for Wales)

As a result, any 'systemic' issues that respondents have with rail, whether the perceived inequality between the level of service in London compared to the rest of the country, or lack of integration with other modes of transport, are assumed to fall to Network Rail.

Naturally, to the extent that Network Rail *can* satisfy these assumptions around oversight, modal integration, and the overall 'equity' of the rail system, it should do so. It should also be noted that respondents do not see Network Rail as regional: the Wales and Western Region, or its constituent routes, do not hold a great deal of meaning for passengers, even once explained.

Issues relating to personal safety during COVID-19 emerged spontaneously, and have implications for what broader improvements passengers would like to see

- **This is mostly about perception.** Passengers were cynical about what the rail industry will be able to deliver and fears about higher ticket prices, reduced services and an overall 'decline' of the network were common.

- Unsurprisingly, **personal hygiene and personal safety** were generally assumed to be the most lasting impact of the coronavirus pandemic. Few if any were willing to let these safety measures lapse, least of all in the run-up to winter.

- A few respondents did argue that the pandemic could (and should) herald a more fundamental change. They suggest a move from a 'hubs and spokes' system of urban centres and rural peripheries to a more **interconnected system** that accounts for the possibility that people may move away from urban centres as working from home persists.

- In terms of the impact of hybrid working on the rail network, the general consensus is that office hours will change, and that **the traditional dichotomy between peak and off-peak may lose its meaning** as work becomes more flexible. Respondents hope that this will be reflected **in a 'flatter' fare structure** across times of day.

- **Few respondents were willing to suggest that commuters should be 'de-prioritised' post-COVID.** Key workers are recognised as essential, and even if there are fewer traditional commuters overall, those who do still commute in a typical 9am-5pm fashion must be protected.

- Likewise, respondents doubted that the rail network could predict the new patterns of hybrid working – the assumption is that *someone* will still need to commute to work on a given day, that they do not have a choice in the matter, and should not experience a decline in service levels.

Guaranteed seating – if someone's standing and breathing on all of you, that's a risk.

Regional Service User, Shorter Distance

*Even though I work from home three days a week, sometimes I don't have a choice – I have to go in. **It'd be an inconvenience to start changing things or concentrating them at certain times of the day.***

Branch Line User, England

*Covid has to some extent done us a favour because there are fewer people using the train but I imagine they're losing a ton of money – **it's hard to imagine what the next five years will be like.***

Branch Line User, England

Once made aware of Network Rail's remit, passengers argue that their main priority is to influence and enable a more punctual and reliable service

Respondents were able to think laterally and 'come up with' ways for Network Rail to help them as passengers

First and foremost, respondents want Network Rail to continue getting the fundamentals right. Maintenance work done on time and communicated well; upgrading and enhancing *when possible;* and managing its supply chain in an efficient and cost-effective way. Passengers are able to 'work backwards' and infer that if Network Rail can do these things, they will see improvements to their journeys, in terms of punctuality and reliability.

However, many of the most immediate concerns that respondents have with their journeys do fall under the remit of train operating companies

The cleanliness of rolling stock, 'newer' or 'nicer' trains, the helpfulness of staff, luggage storage and capacity were all top of mind for most respondents. Again, if Network Rail *can* influence any of the above, it should do so.

> *Well for me it's just about maintaining the tracks and making sure they're rail-worthy. I think we've all encountered times where it's the wrong type of water or snow on the track… I don't know much about it but **surely after 100 or so years of train travel they'd have come up with a solution?***
>
> Regional Service User, Shorter Distance

> ***There's just not much I can think of - why the public are expected to care about train tracks!** I know that sounds really bad, but…The only thing I could think of was the environment. I'm very passionate about the environment, so anything they can do to prioritise it would be good. I don't want any more land destroyed.*
>
> Regional Service User, Shorter Distance

In addition to the 'core' performance indicators, passengers do want to see Network Rail prioritise sustainability within the next 12 months

Our respondents mentioned sustainability unprompted during our focus groups

There is broad recognition that Network Rail is a large organisation; one that employs many people, operates across the whole country, and holds a great deal of assets, many of them green spaces.
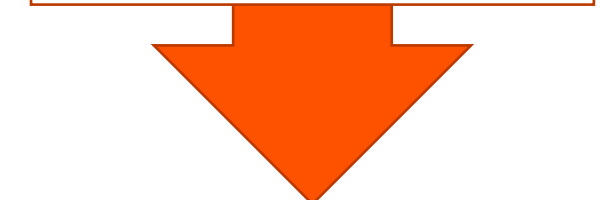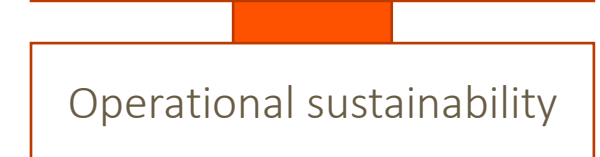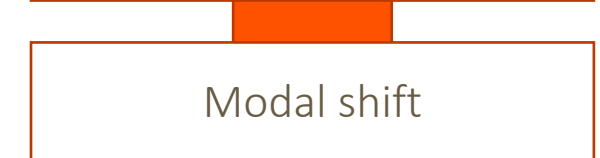
As a result, many evaluate the question of Network Rail's sustainability in much the same way as they would any other organisation: they expect Network Rail to be at least as sustainable as what increasingly seems to be the zeitgeist among large companies.

Few are willing to 'make an exception' for Network Rail simply because the core business activity is itself sustainable.

The most egregious and visible 'non-sustainable' feature of Network Rail in the Wales and Western region is the existence of diesel trains.

Electrification of as many lines as possible over the years is likely to be the most popular, impactful and apparent sustainable change.
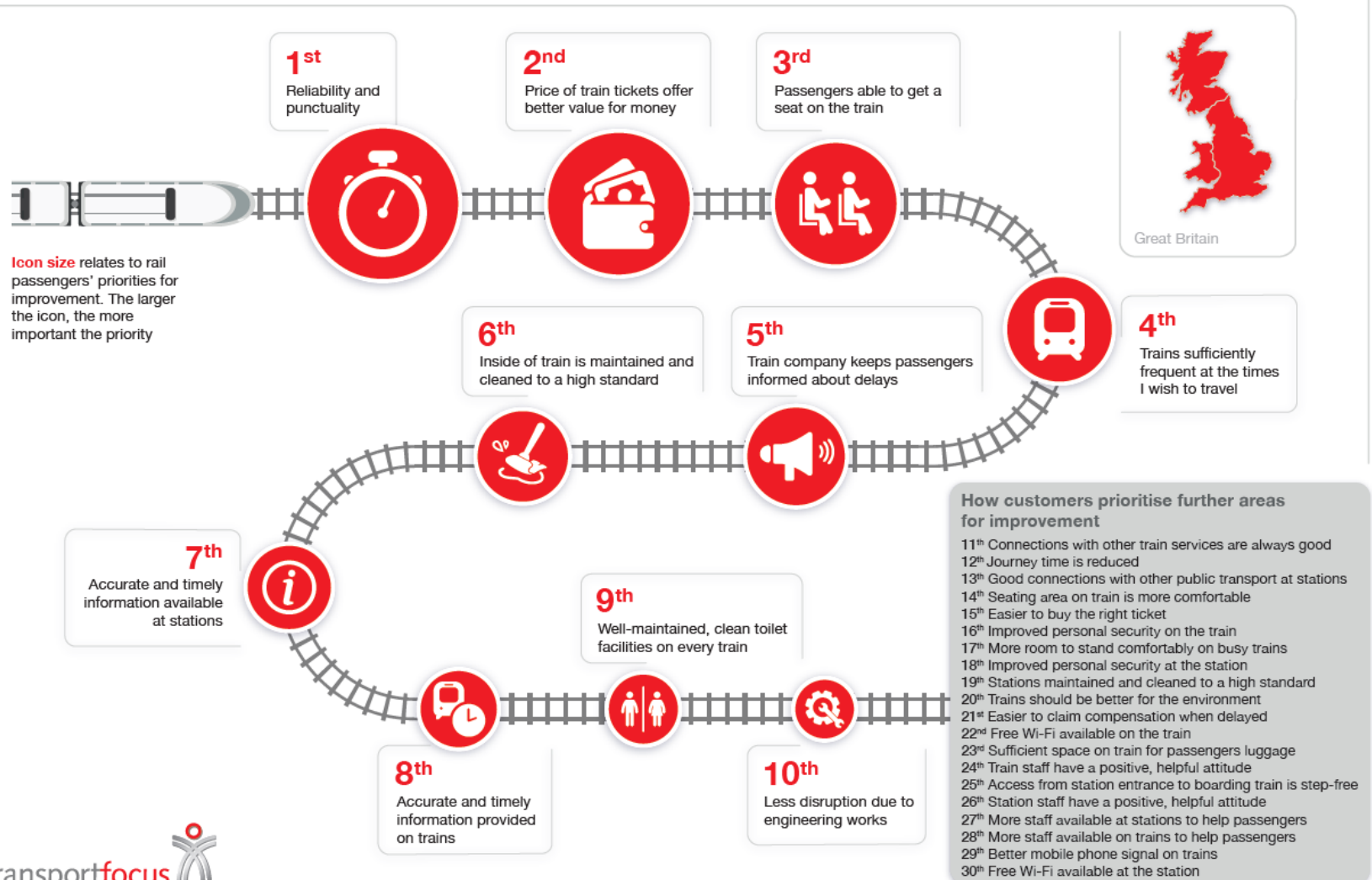
Higher importance

- Electrification
- Modal shift
- Operational sustainability
- Land management
- Community / local economic development

Lower importance

Respondents were shown the (pre-COVID) 2020 rail passengers' priorities for improvement results

Rail passengers' priorities for improvement 2020

Icon size relates to rail passengers' priorities for improvement. The larger the icon, the more important the priority

1st Reliability and punctuality

2nd Price of train tickets offer better value for money

3rd Passengers able to get a seat on the train

Great Britain

4th Trains sufficiently frequent at the times I wish to travel

5th Train company keeps passengers informed about delays

6th Inside of train is maintained and cleaned to a high standard

7th Accurate and timely information available at stations

8th Accurate and timely information provided on trains

9th Well-maintained, clean toilet facilities on every train

10th Less disruption due to engineering works

How customers prioritise further areas for improvement

11th Connections with other train services are always good
12th Journey time is reduced
13th Good connections with other public transport at stations
14th Seating area on train is more comfortable
15th Easier to buy the right ticket
16th Improved personal security on the train
17th More room to stand comfortably on busy trains
18th Improved personal security at the station
19th Stations maintained and cleaned to a high standard
20th Trains should be better for the environment
21st Easier to claim compensation when delayed
22nd Free Wi-Fi available on the train
23rd Sufficient space on train for passengers luggage
24th Train staff have a positive, helpful attitude
25th Access from station entrance to boarding train is step-free
26th Station staff have a positive, helpful attitude
27th More staff available at stations to help passengers
28th More staff available on trains to help passengers
29th Better mobile phone signal on trains
30th Free Wi-Fi available at the station

transportfocus

Rail users' priorities were largely unchanged since the 2020 research, with the exception of cleanliness metrics

While passengers tend to focus on the cleanliness of trains themselves, they do expect larger, Network Rail-managed stations to continue with COVID-safe measures for the foreseeable future

Cleanliness of toilets *was a pre-COVID frustration for many rail users in the Wales and Western region – among leisure passengers, it is a signifier of a less-than-premium service, and for passengers in general, it is felt to be a significant risk factor in the transmission of the coronavirus.*

Cleanliness of trains, *again a pre-COVID frustration, has grown significantly in importance since the pandemic. Wales and Western's more rural users do have the perception that their trains are less clean than those elsewhere in the country (and certainly with mainline services to London), and so both from an equity standpoint and a safety standpoint, this will be a core priority.*

In addition, **capacity** emerged as an important factor for the Wales and Western region, both from a personal comfort and personal safety perspective due to the ability to socially distance. **Complaints of trains arriving in short formation** were not uncommon, and addressing this issue would likely be more appealing than solving for capacity through a more frequent service: passengers in this region want to be able to **board their intended train comfortably, rather than wait for another one.**

> *Certainly cleaning and cleaner toilets would be higher up now in 2021. People definitely want that more.*
>
> Branch Line User, Wales

> *I mean for sure you'd prefer a train every half hour that was spotless than one every 15 minutes that was filthy, nowadays.*
>
> Branch Line User, Wales

Ultimately, for the top ten priorities outlined in early 2020, the only two priorities to see a significant uplift are the domain of train operating companies. Network Rail's key areas of responsibility are largely unchanged in importance: punctuality and reliability still dominate
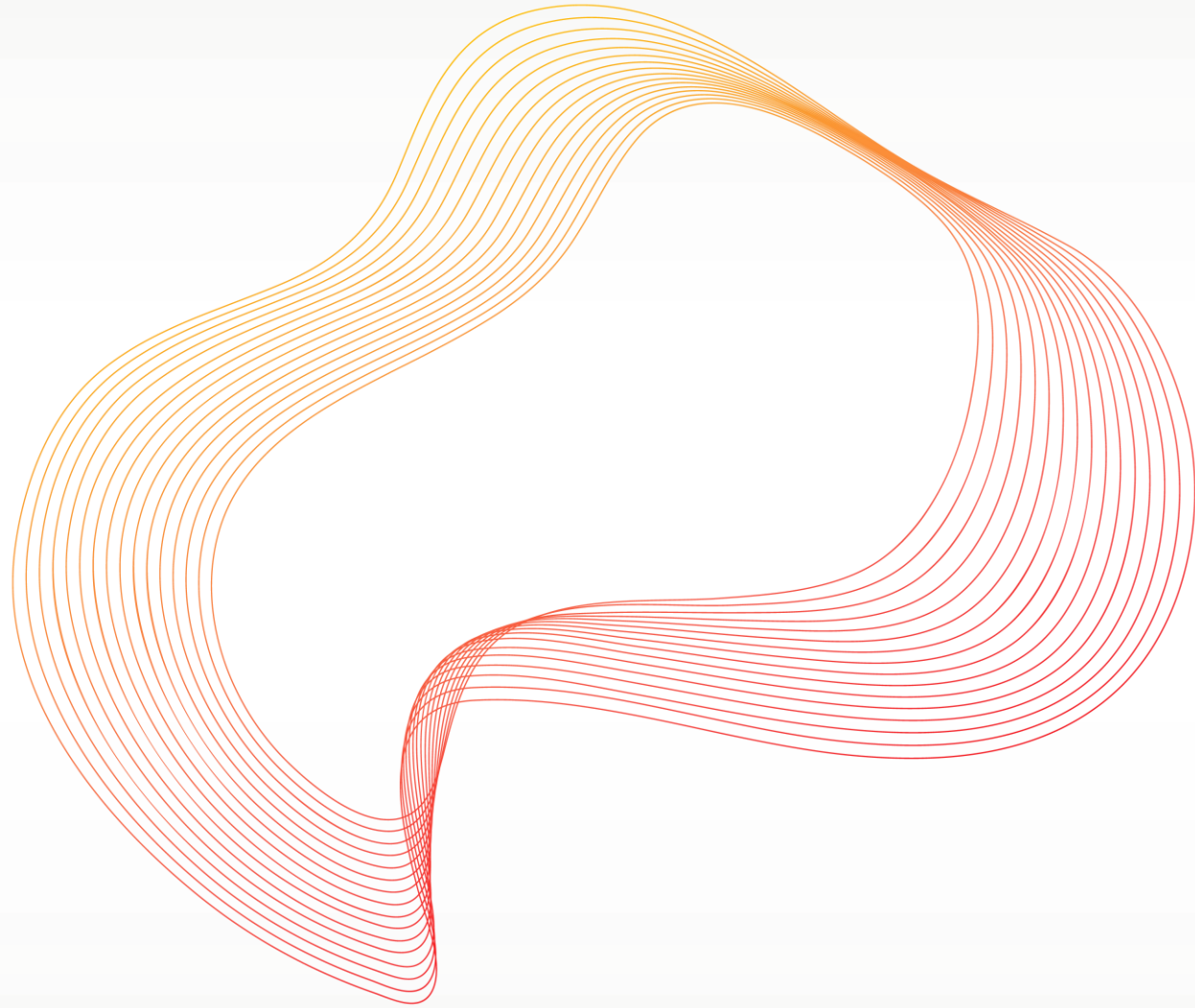
Passengers in the Wales and Western region do not generally prioritise frequency of trains, except through the lens of increasing capacity. They are not accustomed to a 'turn up and go' service, and there are no overwhelming calls to transition the service to such an approach. However, again it should be noted that many passengers' use of the railway has significantly reduced or even stopped altogether since the pandemic. Views on frequency may be based on experience of pre-pandemic service levels and/or the fact that they are now making fewer journeys.

Network Rail's Strategic Vision

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Respondents were shown examples of Network Rail's strategic vision: What Network Rail would like passengers to be able to say about them

Network Rail's strategic vision attracted some cynicism and indifference, but in much the same way as *any* organisation's strategic vision would

Respondents struggle to make sense of Network Rail's local economic impact

Local economic development is thought about in terms of employment and procurement; passengers are unconvinced that 'rail' *per se* is a driver of growth simply by existing – they feel that Britain's economic centres have been developed and connected as much as they can be and they don't grasp the idea of an efficient service leading to economic good. Freight is generally seen as rail's core economic product, but it is poorly understood.

Likewise, even in the area of procurement, local economic development objectives can clash with efficiency-based objectives. While Network Rail leveraging local supply chains might be 'nice to have', ultimately they expect Network Rail to buy best, rather than buy local. In this respect they see Network Rail as a business like any other – its operational efficiencies must not be overshadowed by what is essentially read as 'corporate social responsibility.'

Again, passengers expect Network Rail to operate in a business-like way; organisational excellence is a hygiene factor

Few if any passengers suggested that Network Rail is poorly run; once informed about Network Rail's remit, they find it harder to know who to blame for a delay or an error, and as a result struggle to make the link between a well-managed organisation and a better service. They merely expect Network Rail to be managed as efficiently as any other organisation.

That said, there is a unique and strong expectation that Network Rail should be data-driven. They would value reassurances that Network Rail is making intelligent decisions about renewals versus maintenance, the scheduling of engineering works, and other complex questions. Implicitly, then, they require Network Rail to be a technologically advanced and well-oiled organisation.

The research process revealed transparency and sustainability as two new, key priorities for 2021 and beyond

Respondents learned how little they knew about Network Rail – Transparency became an important goal throughout the focus groups

Many argued that the remit of Network Rail **across Britain** (not just within the Wales and Western region) needs to be stated more clearly throughout its activities. This is in part a question of accountability: respondents value, at least in the abstract, having an end organisation to make complaints to, provide feedback on and evaluate independently.

Ultimately, this will make **engaging with the wider public** about Network Rail's goals and strategy easier – passengers simply do not know what they can ask for, whom they can ask, and how to judge whether they have received what they want.

Current events have pushed sustainability up respondents' agendas – the interest, however, is genuine, urgent and comprehensive

Respondents are aware of businesses of all kinds making moves towards a more sustainable mode of operation. Banks, retailers, fashion brands and almost all consumer-facing organisations have some published 'plan' for a greener future.

Network Rail, however, is not seen as having such a plan. While the basic activity of public transportation is recognised as 'green', respondents do want to see Network Rail being green in and of itself, rather than merely providing a green service. This is, to some extent, a question of narrative – **respondents simply were not aware of the progress Network Rail has made.** However, for CP7, a genuine 'push' towards greener operational standards is called for.

> *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

> *Not all of us can afford an electric car but if the rail were more electric and eco-friendly I think more people would use it.*
>
> Branch Line User, England

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Respondents were asked to evaluate various trade-offs around the future of Network Rail in the Wales and Western Region

Cancellations versus Delays

A train that arrives every 20 minutes, on time, but a train is cancelled every few days

A train that arrives every half hour, with some delays, but is virtually never cancelled

Punctuality versus Frequency

A train that often arrives five minutes late, with three scheduled every hour

A train that is hardly ever late, with two scheduled every hour

Urban versus Rural services

A train system that prioritises the needs of those living in rural areas where there are fewer transport links more generally

A train system that prioritises the needs of commuters who use the rail network for their journeys to work

Planned Disruption

A service that focusses on completing engineering work as quickly as possible but with a likelihood of weekday disruption

A service that tries to do engineering work on evenings and weekends, but that takes five times as long to complete

Sustainability

Focussing on building the network's resilience against extreme weather and climate change for the future

Focussing on improving the level of service you get from the rail industry in the here and now

How do respondents evaluate trade-offs for the rail network?

Cancellations, even if mitigated by frequency of trains, are unacceptable to most

Cancellations are a signifier of an unreliable service. They say negative things about the rail network and are, in passengers' view, more disruptive than even a significant delay. Passengers are keen to point out that the Wales and Western region is not like the commuter belt around London. They feel they have never had, and do not expect, a turn-up-and-go service. They expect to plan around a given train, even for a fairly routine journey, and a cancellation can throw these plans heavily off-kilter.

Again, punctuality is preferable to frequency from both a symbolic and practical point of view

Punctuality is the key signifier of a reliable service; a system that compensates for delays with frequency is likely to be poorly thought of, and in any case, passengers fear 'knock-on effects' causing one delayed train to impact another. In the context of COVID-19, a delayed train is also seen as a sure sign that the next train will be overcrowded, and therefore unsafe.

In spite of the changes acknowledged to follow COVID-19, passengers still want to see urban services prioritised

On first principles, passengers are unable to predict the extent of post-COVID changes; just how many urban commuters will move to rural areas? How many businesses will move to a hybrid or home-working model? Ultimately, passengers concede that the 'safest' approach is to maintain the status quo. From a utilitarian standpoint, an 'urban first' approach is recognised as serving the most non-discretionary (and therefore most 'important') passengers.

Passengers are strongly divided about weekend versus weekday engineering works

Most do concede that the pandemic *may* lead more commuters to have the option to work from home. However, the extent of this is unknown, and perhaps unknowable. In any case, passengers do not want to see weekday works prioritised *purely* on the assumption that workers can work from home. Nor was the prospect of works being conducted faster a particular incentive – passengers are accustomed to the status quo, and are broadly satisfied with the way in which engineering works are conducted in the region.

Some do speculate that the rise of hybrid working could increase the importance of weekend travel to the railway *per se*, and suggest that from a strategic perspective, weekday engineering works might be preferable.

Passengers want Network Rail to focus on its long-term resilience against climate change

Respondents' evaluation of this question was coloured by a broad perception that the rail network is not particularly weather resilient in the here-and-now . The prospect of increasing adverse weather is worrying, and seeing attention paid to it now would be reassuring. Likewise, passengers do (reluctantly) concede that the fundamental level of reliability in the Wales and Western Region is strong enough not to be a high priority for improvement. Indeed, many make the point that resilience in the face of a worsening climate is a necessary condition for reliability.

Ultimately, passengers will judge whether Network Rail has met their needs based on their experience of rail travel

This can be difficult to reconcile with passengers' need for transparency

Passengers do expect to be told how Network Rail is performing against its goals, particularly in terms of timeframes and budgets for engineering works (whether maintenance, renewal or enhancement). They may not go out of their way to access this information, however. Passengers do express the need to have this information put in front of them, usually at the station itself.

Lapses in Network Rail's service feel irreconcilable – passengers are unaware of any watchdog or accountability mechanism for the network

Likewise, awareness of compensation mechanisms was low. Passengers still feel somewhat 'hostage' to the rail network and learning about how responsibilities differ between Network Rail and train operating companies exacerbated the issue. On an accountability point, passengers do want to know 'who to blame' when things go wrong, and have a clear and distinct mechanism for feeding back to each.

*It would be good to know whether they're doing anything to address the whole leaves on the line thing - knowing that they're working out preventative measures - just information about what they do rather than having frustrated passengers wondering why things aren't happening. **It certainly wouldn't harm them to tell us what they're doing.***

Regional Service User, Shorter Distance

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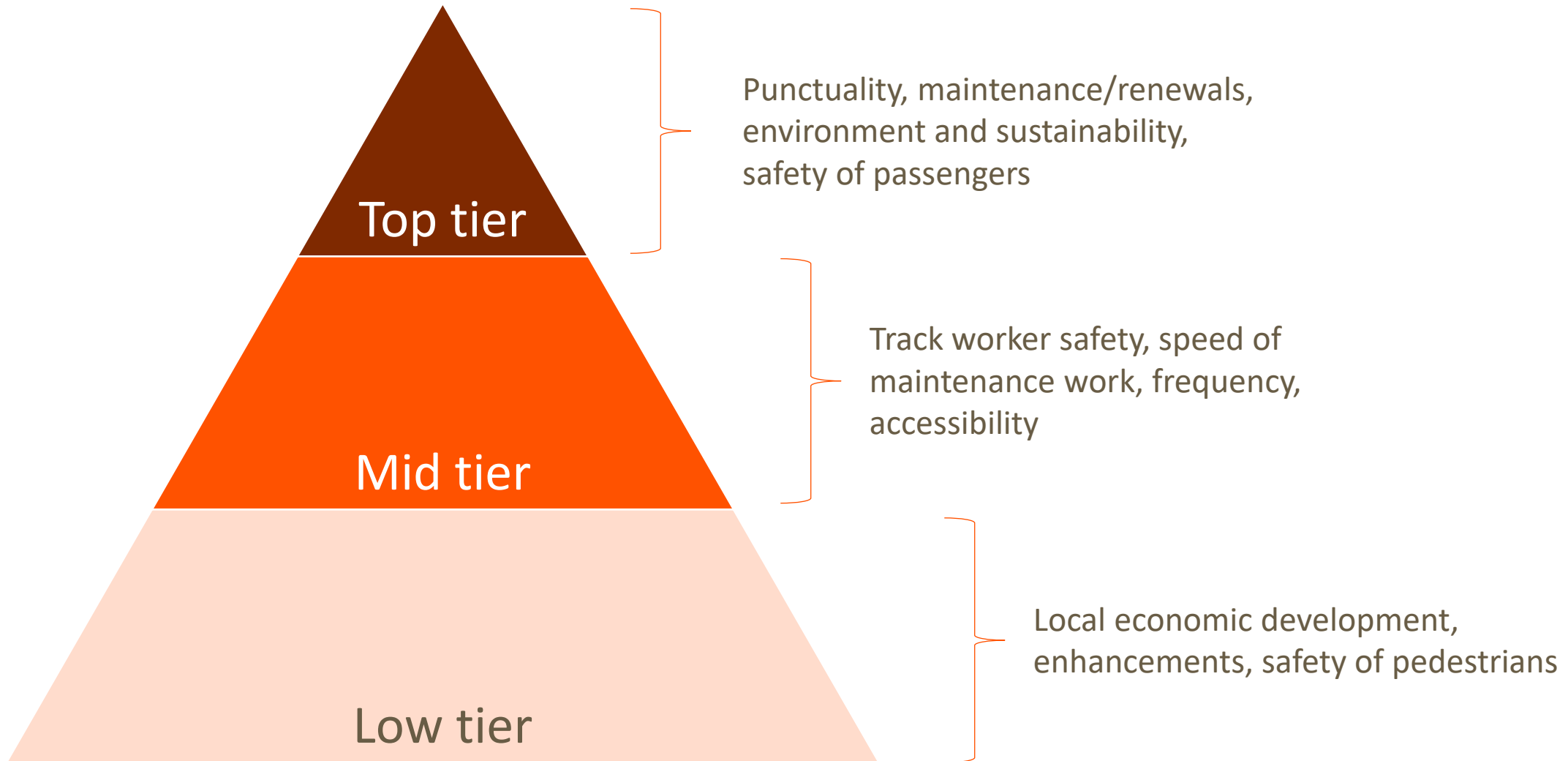# Passenger Priorities for CP7

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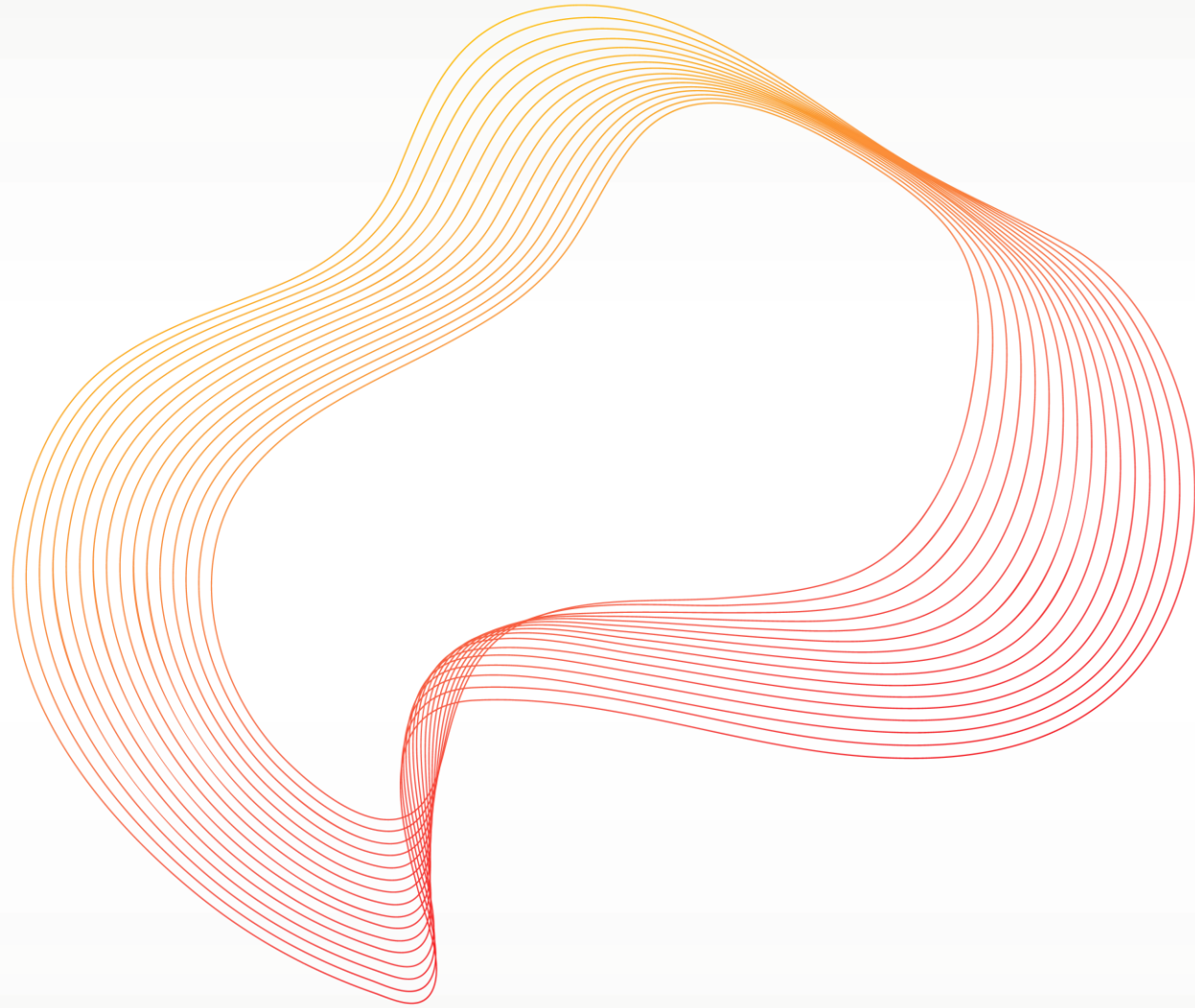
To evaluate CP7, respondents were asked to allocate 'points' to different priorities that could form part of Network Rail's strategy

Imagine you have 20 'points' which you can spend on improving different aspects of your service

Extent of Improvement	Definition	Cost
Significant improvement	The priority is given major attention, and by 2029 you will see a noticeable improvement in this area.	5 points
Steady state	The priority is not given significant attention. It will get no worse, but it will not see a significant improvement until beyond 2029.	2 points
Minimum reasonable attention	The priority is given the minimum appropriate attention for a modern railway. You may notice a decline in this area, but it will be functional and safe.	0 points

Theme	Points
Punctuality	
Safety of passengers (e.g., communications, lighting	
Safety of pedestrians (e.g., level crossing replacements)	
Environment and sustainability	
Local economic development	
Maintaining existing infrastructure	
Renewing (replacing) existing infrastructure	
Creating new infrastructure (new lines, station refurbishments, bridges etc.)	
Frequency of trains	
Track worker safety	
Speed of maintenance works	
Accessibility (step-free access, disabled access, lifts, station assistance)	

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Passenger priorities for CP7 – a summary

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

When 'forced' to make trade-offs against their priorities, longer-term goals around sustainability and personal safety begin to rival punctuality and frequency

'Core' service priorities were (reluctantly) allowed to maintain a steady state: Respondents do concede that the punctuality, reliability and frequency of the Wales and Western region are sufficiently strong. However, it is essential that these remain at a true steady state – passengers are not willing to see standards slip across the three areas they value most immediately.

Safety of track workers, pedestrians and passengers hold symbolic and moral importance: Passengers do not have a clear idea of how safe or unsafe the network is for track workers or pedestrians. However, a 'minimum reasonable attention' approach is unlikely to be tolerated; the legal standards to which Network Rail adheres in this regard are unknown, and in any case respondents would expect Network Rail to exceed them, even in a forced trade-off scenario.

Many passengers gave the environment and sustainability five points – they expect to see an improvement in this area: When asked directly, passengers are willing to see the environment take precedence over punctuality and performance in terms of priority for improvement. But again it should be stressed that passengers are not willing to see standards slip in these areas. The rational point is that climate change feels urgent; it feels like an upcoming deadline to which the network must adapt if it is to remain in any state at all. Morally, passengers do not want to see any organisation be complacent in this regard – all organisations, Network Rail included, must be proactive.

Local economic development is a confusing concept: most expect it to happen 'automatically': If any priorities were comfortably allowed to see a decline, local economic development was the most apparent. While passengers would, all else being equal, value the rail network acting as an employer and client in their local area, the broad conclusion was that the network has 'done enough' – if it can continue to link economic centres and enable the movement of freight, few will argue for a great deal more.

Naturally, in an ideal world, passengers would see all priorities improve from 2024 to 2029 – the exercise was difficult for respondents, and they tended to default to either allowing all priorities to remain at a steady state, or focussing more narrowly on punctuality, reliability and sustainability at the 'expense' of other interests. It should be noted, however, that these evaluations were made in a research environment: passengers may not be as stoic about the prospect of trading off core reliability against sustainability goals in the 'real world'.

Within the 'traditional' functions of Network Rail, respondents struggle to evaluate the relative importance of each, and do to some extent feel unqualified to answer, but some themes can be drawn out

Renewing and maintaining infrastructure attracted a high 'points' total, but it is seen as something of a given

Passengers are content for Network Rail to maintain infrastructure to the extent it deems necessary – the question was largely sidestepped by our respondents. However, where engineering work must be done, it must be done quickly and effectively.

In the case of renewals, again, passengers expect Network Rail to be watchful for any opportunity to find efficiencies and improvements in the process; some argue that this could take the form of 'research and development' into more efficient processes, more robust materials, more efficient supply chains and so on. When respondents call for a significant improvement in this area, this is broadly what they mean.

Creating new infrastructure was occasionally given a high score in the points exercise but only when the respondent had a specific project in mind

Passengers can be suspicious of enhancements. Stories abounded (rightly or wrongly) throughout the focus groups of infrastructure projects that had overspent, been delivered late, or abandoned altogether. Respondents were unwilling to give significant priority to enhancements *per se*; they are not interested in a wide portfolio of new infrastructure, and can begin to question whether the enhancement was necessary to begin with. They expect Network Rail to be selective and efficient.
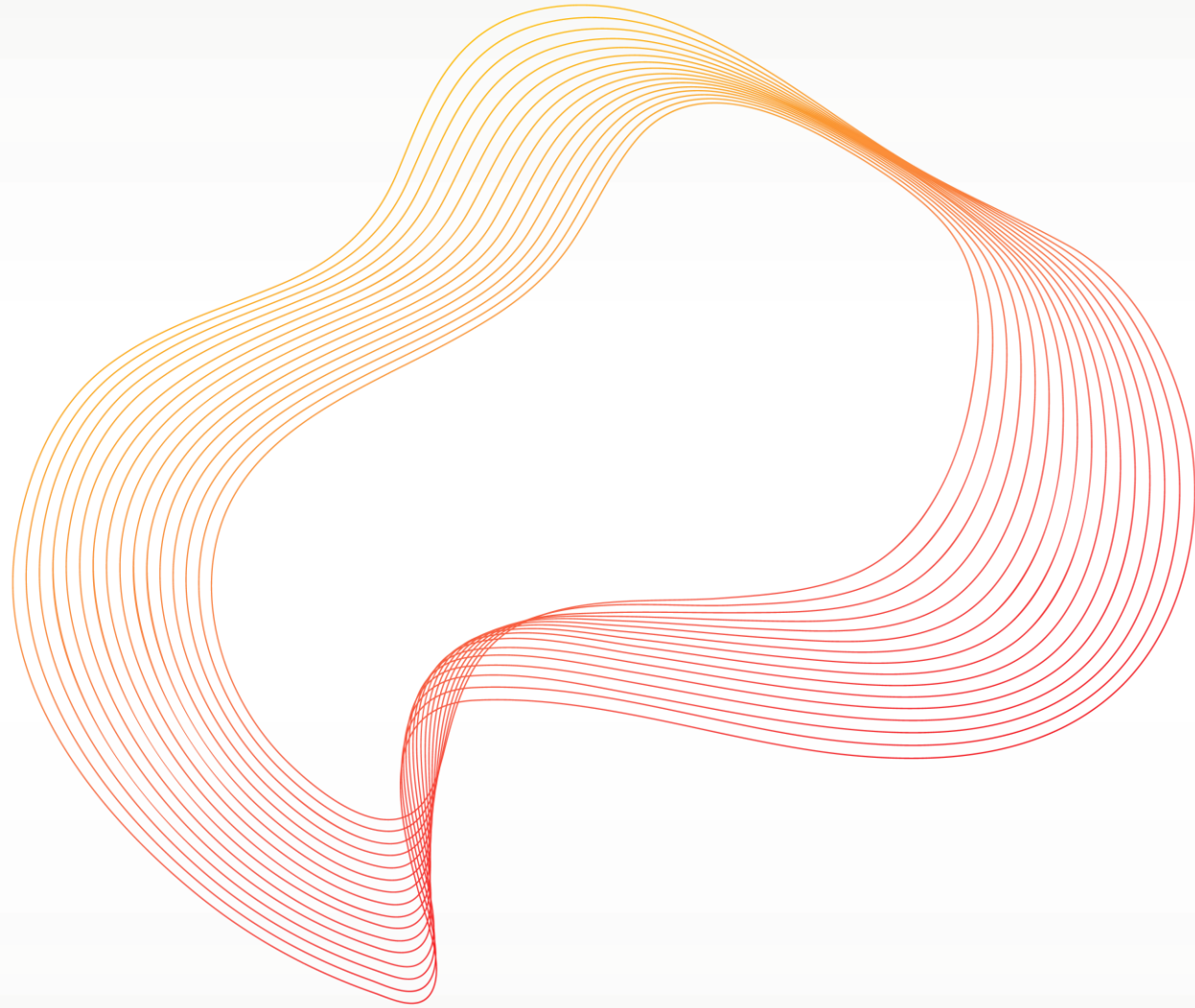
Frequency was occasionally a priority for people who *almost* experience a metro-like service

For branch line users, regional service users and rural users in general, however, it doesn't emerge as a major goal, and could (again reluctantly) see a decline provided commuters are well-served during traditional peak hours.

Accessibility was crucial for those who have specific accessibility needs, but was hard to evaluate for others

Disabled respondents in particular felt that even Network Rail operated stations in the region could benefit from accessibility-related enhancements.

Exploration of individual themes

Passengers expect Network Rail to define and explain their own philosophy on maintenance versus renewal work in the region

Most respondents assumed that rail assets have (or ought to have) a pre-determined maximum lifespan, and that Network Rail should adhere to this, even when more use could be 'eked out' with maintenance. Passengers want the risk of unplanned asset failure minimised, and whether this is achieved through renewal or maintenance feels beside the point for most.

From a symbolic standpoint, however, passengers want Network Rail to have a long-term and consistent philosophy on engineering work: decide on the optimal balance of maintenance and renewal and apply it to the Wales and Western region.

The question of cost-saving was difficult for respondents to comment upon. A 'short term saving' achieved through maintenance over renewal is not particularly enticing, as passengers wonder what that saving might usefully be spent on.

Renewals, however, do have one unique (perceived) selling point. Passengers hope and expect that a renewed piece of infrastructure is better built, more economical, more efficient and perhaps even longer-life than its predecessor.

I suppose in an ideal world you'd be proactive but it just doesn't seem like the right scenario for it; you'll always have to tolerate some degree of risk.

Commuter, Bristol, Shorter Distance

It's a bit like potholes in the road, you mend one and another appears, then ten appear and it's gone out of control – you've got to be proactive about it, plus you're safeguarding these assets for the future.

Commuter, Bristol, Shorter Distance

I agree with the proactive approach but the flip side is the cost of it; sorting out every last bit of maintenance that needs doing, and I think organisations like Network Rail probably would tolerate a more reactive approach over the short term pain in the bottom line. In an ideal world we'd all want the proactive approach because it'd mean that the infrastructure will hold, but it's a huge undertaking.

Commuter, London Paddington, Longer Distance

While respondents struggle to evaluate the merits of a proactive versus reactive approach to maintenance, the reactive approach can *feel* haphazard

Ultimately, passengers do not draw significant distinctions between 'planned' and 'unplanned' delays due to works

While passengers did concede that engineering works in the region are communicated well and with sufficient notice, 'in the moment', a delay is still a delay, and the risk of minor delay due to engineering works was not seen as a significant issue. Certainly, reducing the risk of very minor unplanned delays (reduced speed limits, for instance) was not seen as worth any costs (financial or otherwise) associated with the proactive approach.

All else being equal, however, the proactive approach feels more 'professional'. As discussed, respondents expect Network Rail to be data-driven in their maintenance. This is another issue where the question is to some extent passed back to Network Rail: decide on the best approach, develop a predictive, intelligent and consistent approach, and adhere to it.

Sustainability is usually read in terms of climate change and carbon emissions; broader 'social value' objectives can be met with a lack of interest

Respondents acknowledge the large 'footprint' of Network Rail – as a large organisation with vehicles, buildings and other substantial assets, it is expected to manage and operate them in a low-carbon way

Transitioning Network Rail's road fleet to zero-emission vehicles would be a popular and effective intervention. Many respondents were surprised to learn that Network Rail had a road fleet to begin with, and petrol-burning vehicles are well understood to be a significant contributor to climate change. Low-carbon heating was less well-understood. If heating Network Rail buildings is a greater source of CO_2 emissions than the road fleet, respondents would expect this to be prioritised over electric vehicles.

Biodiversity and ecological sustainability were a second-tier, though still important, consideration

Leisure users in particular are fond of the green spaces they pass on their rail journeys. There was a persistent argument across our sample that Network Rail should not actively 'destroy' these spaces through the building of new assets, but the assumption is that Network Rail is performing well in this respect. The green spaces are still demonstrably *there*, and ultimately passengers want Network Rail to maintain this status quo.

Materials re-use is well liked in theory but can clash with passengers' interest in 'new' and therefore 'better' assets

More 'innocent' applications of upcycling or material re-use such as turning railway sleepers into flower beds are unobjectionable. However, passengers expect every maintenance or renewal to be an opportunity to use 'best in breed' materials from an efficiency standpoint.

Social value objectives, such as community gardens or community outreach, can feel like a lower priority

Passengers do want to be heard. They enjoyed taking part in our research process and, as discussed, want robust and direct feedback mechanisms for Network Rail and train operators alike. Couching this in 'community outreach' terms can feel somewhat inert, however – it is not clear what Network Rail would actually *do* as a result of their outreach.

Conclusions

Executive Summary

Passengers approach Network Rail's strategic priorities from a position of limited understanding

Even when explained, passengers do not know to whom to ascribe specific failings or successes - to train operators, Network Rail, government, or any other related organisation. But while it is unclear to many what Network Rail's specific remit is, Network Rail is seen as an important organisation. Network Rail is readily visible, and seen as being in a position of authority over national rail services. Many therefore conclude that whatever Network Rail does, it must be done well; efficient, cost-saving and data-driven decision-making are all expected, and maintaining and improving on this would be a desirable aspect of CP7.

The key message from most passengers is for Network Rail to focus on the fundamentals

The pandemic, changes in working patterns and the rise of sustainability in public consciousness have not fundamentally altered the key performance indicators of the rail network in Wales and Western. Punctuality, reliability and capacity still dominate passenger assessments of what makes for a good service.

However, value for money has become a more pressing concern. Passengers fear that COVID-19 will leave a legacy of diminished and worse-for-wear rail services, with higher ticket prices, and anything Network Rail can do to stem the issue would be valued. Value for money is a holistic consideration: tickets are not seen as cheap; for the prices these passengers pay, they will expect the whole service to perform well, from comfort, cleanliness and amenities to punctuality.

As a result, any 'worsening' of the network in Control Period 7 will be met with frustration – there is no easy solution, since passengers view the question of value for money so broadly. However, the key metrics of punctuality and reliability are held sacrosanct and should not be allowed to deteriorate (if they cannot be improved).

That said, passengers are willing to give Network Rail permission to think 'long-term' about broader, sustainable goals

In spite of the above, passengers tend not to think of their region as suffering from a lack of investment. Their worries are around how well the region is managed, rather than in terms of pounds and pence put into the system.

The research also suggests that passengers are willing to forgo 'quick wins' in terms of short-term improvements to reliability in the interest of supporting sustainability goals.

This needs to be understood in context. Passengers arrive at this view only once they have been provided with information about the role of Network Rail and been asked to consider how the organisation should decide between competing priorities. In an ideal world, passengers would like to see improvements in all aspects of Network Rail's performance. Moreover the focus on sustainability in this context is primarily on resilience. Many passengers conclude that a sustainable network is a reliable network; improvements to punctuality mean nothing if they cannot be maintained in the face of a worsening climate. This is not to say that passengers are unconcerned with sustainability beyond the question of resilience. Passengers expect Network Rail to be *at least* as sustainable as what increasingly seems to be the norm among large companies.. But given all of the above, while passengers are not willing to see punctuality and reliability standards slip, they believe that ensuring resilience is equally important.

Our research programme is still in progress. We will re-contact 20 of the most engaged respondents from the focus group for a follow-up interview to sense-check our conclusions, evaluate any changes in perspective since the group, and test any early thoughts Network Rail have about the shape and nature of CP7

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