Rail and Urban Transport

Call for Evidence

Submission from Transport Focus

Introduction

Transport Focus is an independent, statutory consumer watchdog promoting the interests of transport users. Our remit covers rail across Great Britain, bus, coach and tram in England (excluding London) and users of the Strategic Road Network in England. Working with transport providers and Governments across England, Scotland and Wales we ensure that the users voice is heard.

We welcome the chance to contribute to the review. Our submission below does not address the specific questions listed in the call for evidence. We have focussed on setting out rail, bus and road users' priorities for the future. We believe it is crucial that any transport review ultimately looks at outputs and outcomes for the users of those services.

Rail Users

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

Our most recent research on priorities found that passengers' two main issues – well ahead of others – are the 'price of train tickets offers value for money' and 'reliability and punctuality'[1]. This is consistent with previous research[2] and reaffirms that what matters most to passengers is a punctual and reliable railway that delivers on the timetable's promise at an acceptable price. The railway must maintain its focus on this.

Passengers' other key priorities also reflect an emphasis on the railway getting the basics right. Passengers want sufficiently frequent trains and accurate and timely information about train times and any delays. They want a seat on board a clean train and, of course, they need to feel safe. We also produced a 'simulator' that allows the research to be broken down by different characteristics - e.g. by train company, region, journey purpose and by passenger characteristics - age, disability etc[3].

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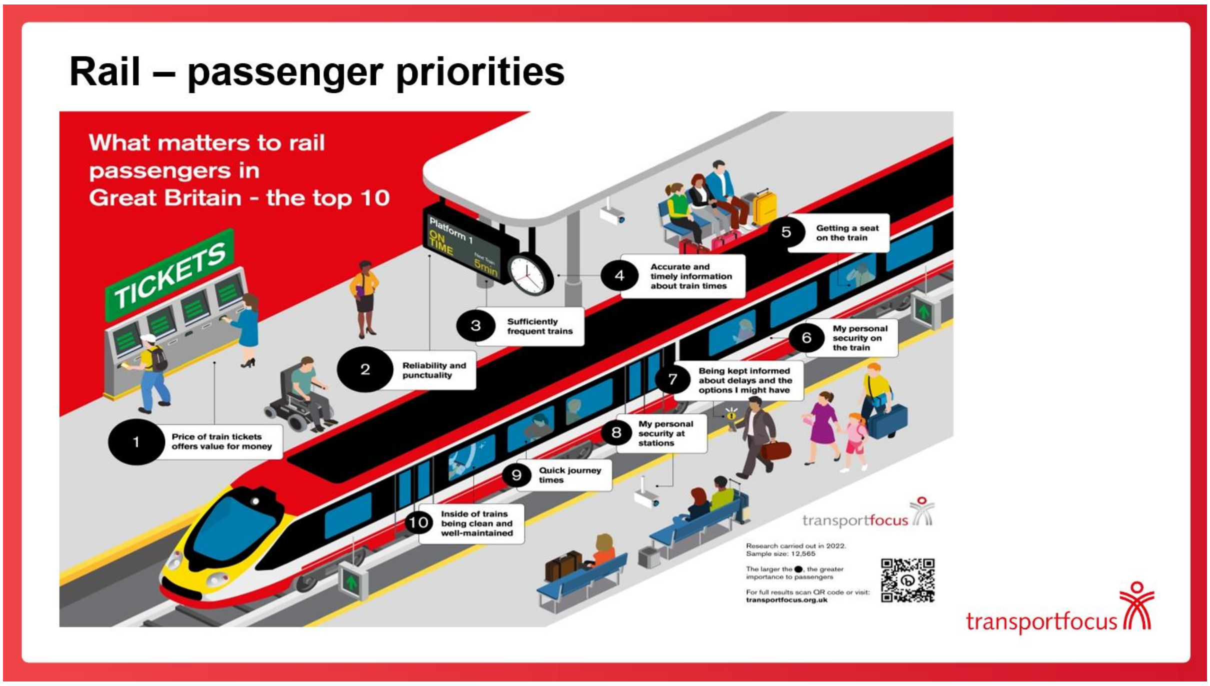
[1] Britain's railway: what matters to passengers. Transport Focus. December 2022
[2] Rail passengers' priorities for improvement 2017 and 2020. Transport Focus
[3] https://www.transportfocus.org.uk/publication/britains-railway-what-matters-to-passengers/



How well the industry delivers these primary requirements goes a very long way in determining how passengers view the railway. The core product is key in determining passenger satisfaction, with punctuality having the biggest impact on overall satisfaction, followed by crowding and the level of cleanliness of the train[4].

Our submissions to the Williams Rail Review identified several core criteria/characteristics that any new railway structure should deliver[5]. These included:

- Consistently delivering the core product: a reliable, affordable, punctual, frequent service on which you can get a seat.
  Making rail more attractive could also help to grow demand. Transport Focus's research shows that the main barriers to using rail are around cost and convenience[6]. When comparing car and public transport use, people typically just consider petrol and parking costs – they do not tend to factor in things like depreciation and servicing. These are seen as part of the general cost of owning a car rather than specific to the cost of making a journey. Convenience can take many forms. For some it is the overall door-to-door

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[4] What drives rail passenger satisfaction? Transport Focus.2021
[5] Transport Focus submitted five reports to the review:
- What do passengers want?
- What do passengers think about the structure of the railway?
- Barriers to travel: How to make rail more attractive to infrequent and non-users
- Trust in train operators: an exploration of issues influencing passenger trust in rail
- Passenger representation

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

journey time that matters, for others it's comfort, the potential to work/relax while travelling or the ability to travel when they want rather than be tied to a timetable.

- Putting the customer first: aligning industry structures and incentives so that they deliver the outcomes and behaviours that passengers want to see.

  Key to this will be integrating train operators and infrastructure providers. There must be an end to issues being passed from one party to another, with the emphasis sometimes being placed on 'who is responsible' rather than 'how can we fix it'. This could also facilitate quicker/better decisions when things go wrong (based on what's best for passengers rather than for each organsiation).

  It could also unlock efficiency savings which could help to reduce pressures for fare increases and/or allow more to be spent on improvements. This could also help address the funding challenge facing rail, particularly post Covid. For example, latest figures from the Office of Rail and Road report a £2.5bn gap between passenger train company income (£9.2bn) and costs (£11.7bn)[7].

- Designing metrics and monitoring systems that make sense to passengers and drive behaviours that passengers want to see.
  Transport Focus's strong preference is for targets based on what passengers' think – the best judge of quality being those who have used the services in question. To this end we strongly support the use of passenger satisfaction targets. If the train company fails to meet the required targets, it should produce an action plan designed to rectify this failure. This drives up the quality of service provided and also promotes a greater sense of accountability between service provider and consumer.

  We believe that any new industry structure should continue to focus on service-quality targets. In a competitive market, the consumer will 'vote with his/her feet' if they do not like the quality of the product on offer. As long as there is little competition or choice within the rail sector, then there will be a need for some form of regulation to engender similar levels of accountability and responsibility. Key to this is to monitor passenger satisfaction. Transport focus used to produce the National Rail Passenger Survey (NRPS) which looked at satisfaction across all operators but this was discontinued during Covid. We are now working with the industry and DfT on a successor survey.

[7] Rail industry finance (UK) April 2022 to March 2023. ORR

- Accountability and transparency: a sense of someone being in control / a guiding mind who can be held accountable, and who 'owns' the customer relationship.
  Our research shows that passengers are more concerned with the outcome of their journey than with the structure of the railway[8]. However, they did want a sense that there is 'someone' in charge when it comes to service. They want someone to take overall responsibility for the railway and for this person/body to be accountable for decisions made and the quality of service provided.

  One of the keys to accountability is transparency. Giving rail passengers access to information that matters to them will help them to hold the train company to account and to ask what is being done to improve services in return for the fares they pay.

- Engaging customers: giving passengers a voice in the decision-making process.
  An element of transparency is not enough on its own. Passengers also want a sense that their voice matters and that the person/body in charge is actually listening to them. Passengers should not be the passive recipients of major decisions made on their behalf behind closed doors.

  The culture of engagement has undoubtedly improved in recent years. This needs to continue, especially in relation to the accessibility of the railway and involving people with a lived experience of disability. Transport Focus research constantly demonstrates the value of involving passengers and the resulting benefits that accrue to the industry. Research on engineering work on, for example, the Brighton Main Line upgrade[9], Derby resignalling[10], and Kings Cross station[11] shows that giving passengers timely, accurate information can improve satisfaction levels with the way that planned disruption was managed. Higher awareness of disruption also leads to greater acceptance of the alternatives – passengers can cope better with disruption and bus replacements if they have been able to plan for it.

  Other good examples surround the design of new rolling stock. Transport Focus worked with Merseytravel to gather passenger input throughout the entire design process[12]. The result is a train that better meets the needs of those who will use it.

[8] The structure of the rail industry. What do passengers think? Transport Focus 2019
[9] Brighton Main Line Improvement Project – the passenger perspective. Transport Focus. September 2019
[10] Derby resignalling works. Transport Focus. March 2019
[11] Kings cross station closure. Transport Focus. February 2020
[12] New trains for the Merseyrail Network – What passengers want. Transport Focus. February 2021

The proposal to create ‘Great British Railway (GBR)’ could achieve some of these aims. It would create a single organisation with powers to control and co-ordinate infrastructure and service delivery. It would have powers enabling it to align industry incentives and get all parts pulling in the same direction, enabling a more efficient and reliable railway. It would also be able to own the customer relationship, taking responsibility for all aspects of delivery from journey planning to complaints. As long as the customer is at the heart of the organisation, and its decisions, this would meet passengers’ broad aspirations.

GBR could also facilitate a longer-term strategic focus, helping to ensure that investment decisions are part of a clear strategic direction. This in turn could help create more stability for the rail supply chain, which could help them to invest in people and technology thus reducing potential bottlenecks for future growth.

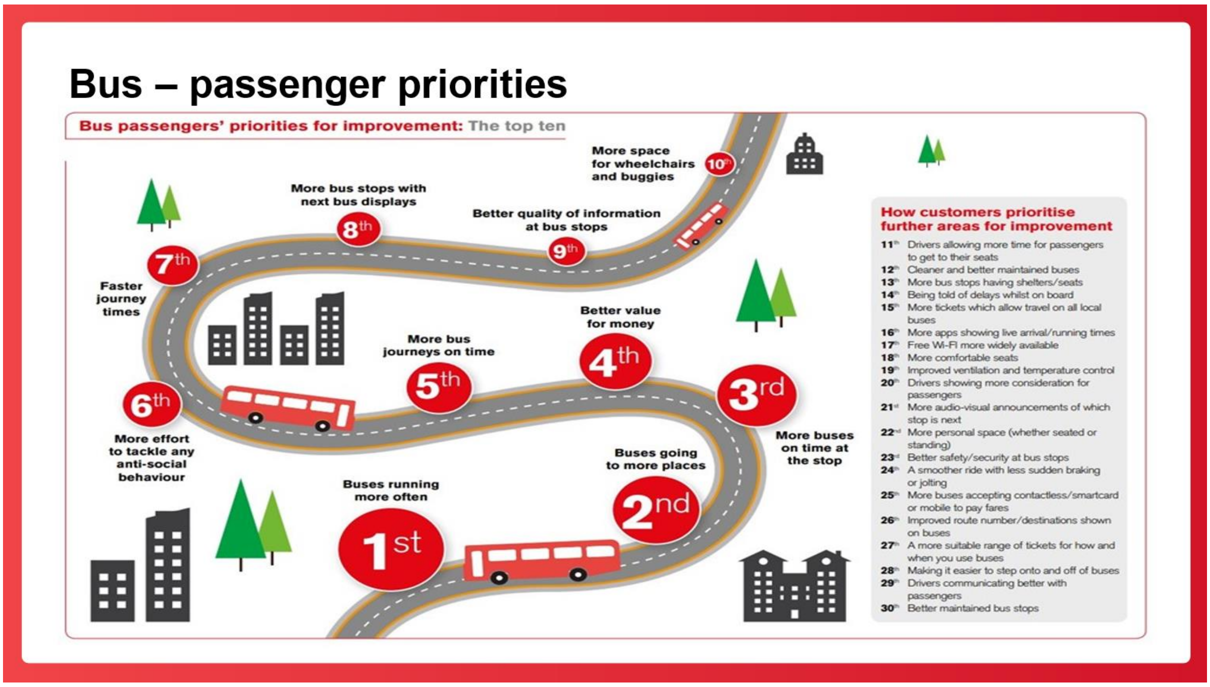
The clarity and scope of this guiding mind will depend to some extent on the degree of separation between government(s) and GBR. It is clearly right that government(s) set the strategic direction and priorities for rail (rail is a public service and is heavily dependent on taxpayers’ money) but getting the balance right between strategy and operations will be important if the guiding mind element is to be delivered effectively.

Bus Users

Transport Focus’s research gives us a good understanding of passengers’ expectations and aspirations. In 2020 we published research into passengers’ priorities for improvement. Over 5000 passengers across England ranked 30 possible improvements to their bus service[13].

We also produced a ‘simulator’ that allows the research to be broken down by different characteristics - e.g. by bus operator, by region, whether in town or rural and by passenger characteristics - age, disability etc.[14]

[13] Bus passengers’ priorities for improvement. Transport Focus. 2020
[14] https://www.transportfocus.org.uk/publication/bus-passengers-priorities-for-improvement-2/



How the bus industry delivers these will have a big influence on how passengers (and non-users) view the industry. As with rail, punctuality and reliability are the most important drivers of overall passenger satisfaction[15]. The time the journey on the bus took is the second most important.

The main barriers to making more journeys by bus are similar. Our research shows that for non-users in general the main reasons are very practical: along with a preference for the car and its relative convenience, their perception is that bus journeys take too long, buses don't run where or when they want them to, and they are too unreliable[16]. This work also shows the measures that would encourage more bus use are better value fares, and more frequent and reliable services.

One of the key challenges facing the bus sector concerns growth, especially post-Covid:

- Passenger numbers
  DfT's annual bus statistics show an increase in bus passenger journeys in England in 2023 - up 0.5billion to 3.4 billion. However, this is still lower than before the coronavirus (4.1bn for the year ending March 2020).[17]

- Bus mileage
  In the year ending March 2023, there were 1 billion bus service miles run in England, a slight decrease of 4.6 per cent on March 2022; and 10.6 per cent lower than the year ending March 2020. This continues a longer-tern trend.

[15] Bus passenger satisfaction: key driver analysis. Transport Focus. 2023
[16] Motivations and barriers to bus use. Transport Focus. June 2023
[17] Annual bus statistics: year ending March 2023. DfT. November 2023

> Since 2005 bus mileage (in England outside London) is 28 percent lower than year ending March 2005. This has been driven by a decrease of 46.7 percent in local authority supported mileage, in particular in non-metropolitan areas.

We supported proposals in the National Bus Strategy designed to increase passenger numbers. Providing a better 'toolbox' that enables local transport authorities and bus companies to work together on enhanced partnerships (or through franchising) should help to improve services and to make them more attractive to existing and potential users. This in turn should help cities and regions unlock opportunity and grow their economies.

The use of enhanced bus partnership/bus franchising should also help deliver the passenger priorities set out above. In particular:

- Punctuality. Our research shows that some of the main causes of delay are outside the direct control of the bus company, for example: delays to the bus because of parked vehicles or vehicles being loaded or because of highway design (narrow roads, poorly designed junctions)[18]. A partnership approach to unblocking these should be more effective for passengers. Passenger representatives can also play a role within partnerships and bus franchising arrangements to help focus on areas of poor performance and discuss how this can be best addressed.

  Bus punctuality is a national issue and it can only be improved if we have a clear picture of it and if local authorities and bus operators are held accountable for their performance. The Department for Transport regularly reports on the punctuality of buses nationally[19]. This shows that operators are consistently failing to meet the 95 per cent punctuality target set by the Traffic Commissioners. A reliable and punctual bus service builds trust and satisfaction amongst existing passengers. It would also go a long way to addressing the perception of the service amongst non-users making the offer to use the bus more attractive. It is important that attention and resource is focussed on monitoring and enforcement of bus journey reliability and punctuality.

- Frequency. Partnerships and bus franchising could also improve the frequency of services, especially of socially necessary services. By working together, it may be possible to extend existing levels of coverage or, at the very least, avoid the need for further reductions in subsidised services.

- Value for money. Partnership working increases the scope for closer working on multi-operator / multi-modal tickets as well as joint marketing initiatives.

[18] What's the holdup? Exploring bus service punctuality. Transport Focus. December 2014
[19] Bus reliability and punctuality (BUS09). DfT bus statistics data tables

Lower fares and simpler tickets are also likely to be a core objective of bus franchising. Our research on bus ticketing showed that there was a need for better access to information on fares and ticketing[20]. Passengers often relied on word of mouth and the bus driver for information on times, routes and fares. There is potential for business to be lost because potential passengers simply don't know how to use the bus or because people can't find the ideal ticket for their needs. Lessons from the Cornwall Bus Fares Pilot, when available, should be studied to enhance our understanding of how particular approaches can increase passenger satisfaction with value for money.

Post-pandemic, our national research into measures for getting passengers back on buses looked at what could encourage those who have reduced their bus travel to use the bus more[21]. This found that value for money is towards the top of the priority order for those aged 20 to 64, who are most likely to be fare payers. The findings show that ticket discounts and special offers will encourage a large share of lapsed users to use the bus more than now, especially the younger ones. Half of lapsed users agreed that special ticket offers would encourage them to use the bus more and a third agreed that they would return to using the bus sooner if their first trip were at a reduced price. This shows value for money being a strong factor for lapsed and non-users.

- Personal security. Closer working ought to also help with personal security. One of the main causes of concern for passengers and barriers for potential users is the anti-social behaviour of other people. Partnerships can help create the environment where operators and authorities, along with other agencies such as the police, can identify and address problem areas both on the bus and getting to and from the bus stop.

More information on our detailed aspirations for partnerships and franchises can be found in our submissions to local authority consultations – such as the West Yorkshire Combined Authority Bus Franchising Consultation[22]

Getting the best passenger 'dividend' from partnerships will also require a focus on 'how' things are done as well as 'what' is done. In 2015 we asked passengers about their relationship with their bus company and how much they trusted them[23]. In doing so it became apparent that many passengers have a limited understanding of how

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[20] Bus Passenger views on value for money. Passenger Focus. October 2013
[21] The route ahead: getting passengers back on buses. Transport Focus. June 2021
[22] West Yorkshire Combined Authority Bus Reform Consultation - Response from Transport Focus. January 2024
[23] Bus passengers have their say- Trust, what to improve and using buses more Transport Focus. 2016

bus services are structured, particularly when it comes to what a bus operator is responsible for and what the local authority provides.

We found that building a relationship with passengers has both a rational and an emotional element. At the rational level it means running the buses on time, being reliable, coping with disruption, resolving problems and offering value for money. However, it is the more emotionally engaging factors that build real affinity. This includes things like staff going the extra mile, and feeling like the company really does care what happens to you.

To this end we believe there is a need to adopt a passenger centric approach to planning and delivering services:

- Passenger centric targets and benchmarks. Transport Focus has produced a best practice guide on setting targets for passenger growth, journey times, reliability improvements and customer satisfaction[24]. This also includes monitoring and reporting on performance against them.

- A charter setting out what passengers can expect (e.g. as in West Yorkshire Combined Authority and Cornwall)[25]

- Involve local passengers in decisions about their service. In 2021 we published a best practice toolkit setting out the role and benefit of passenger representation through Bus Service Improvement Plans[26].

Road Users

Transport Focus's remit for roads extends to users of the Strategic Road Network (SRN) in England, comprising the motorways and major 'A' roads managed by National Highways.

As with rail and bus our approach has been to look at users' priorities. The overall priority for car and van drivers was the quality of the road surface. Safer design and upkeep of roads is the second highest priority for improvement with the next most important being better management of roadworks, better management of unplanned delays and better information on unplanned delays[27].

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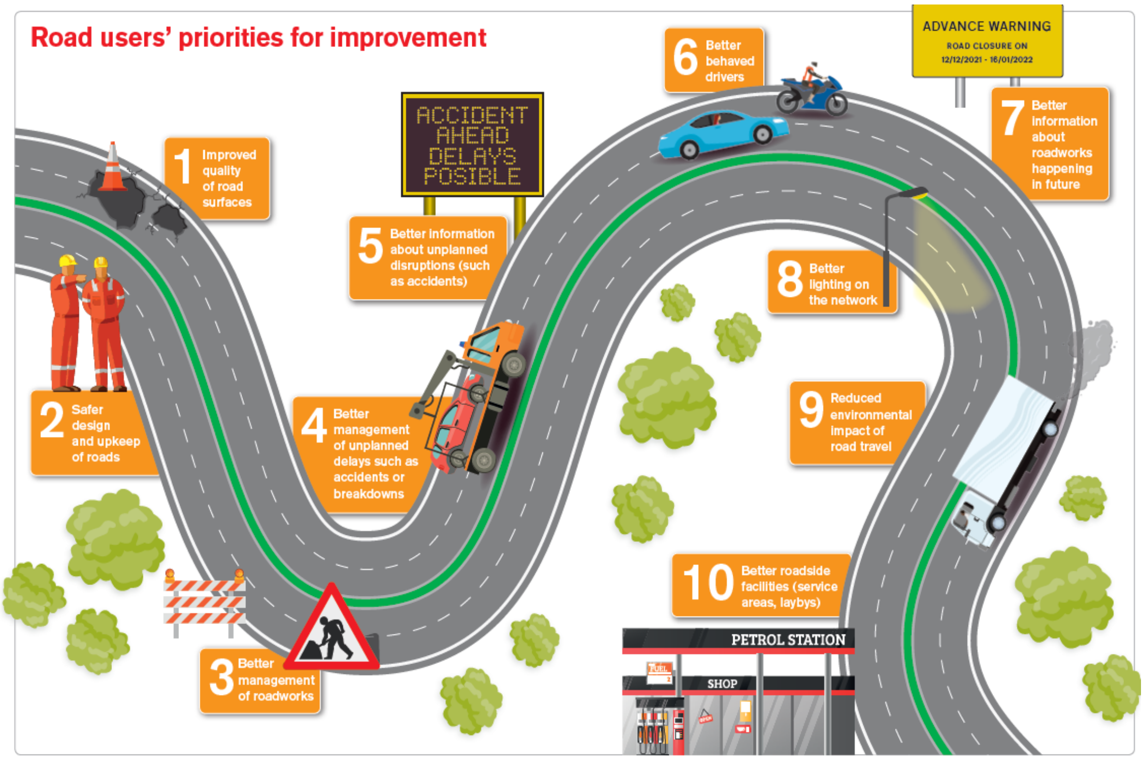
[24] Setting targets in Bus Service Improvement Plans. Transport Focus. June 2021
[25] Passenger charters for Bus Service Improvement Plans. Transport Focus. August 2021
[26] Passenger representation on Bus Service Improvement Plans. Transport Focus. May 2021
[27] Road users' priorities for improvement England's motorways and major 'A' roads. Transport Focus.
August 2021

We have also created a simple way to see how the priorities for improvement vary by different types of road user, different vehicles used and different journey lengths by applying filters[28].



As with rail and bus we believe it is important that users' interests are at the heart of decision making. Our report 'Putting road users at the heart of the Road Investment Strategy for 2025-30[29]' made a number of points, including:

- That the majority of road users wanted the focus to be on keeping National Highways' existing roads in good order before building new ones. Almost two thirds of our survey (65 per cent) said that maintenance of the existing roads is more important than building new.
- That National Highways' explicit purpose should be to provide a service to its customers rather than simply be the builder, maintainer and operator of infrastructure. The latter being the means to an end rather than the end.
- To adopt measurements and targets that focus on what is important for users (for example, on road surface quality, on reducing delays caused by roadworks

[28] https://www.transportfocus.org.uk/publication/check-how-road-user-priorities-for-improvement-vary-by-type-of-user-and-journey/

[29] Putting road users at the heart of the Road Investment Strategy for 2025-30. Transport Focus. October 2022

Appropriate funding for National Highways to renew the existing network is crucial to road users, with impacts on – for example – surface quality and whether electronic signs and speed limits work properly. It is important to recognise that much of the National Highways network was built between the mid 1960s and early 1980s and a significant bow wave in capital renewals is approaching in the coming years.

Challenges for the future

In addition to the specific points set out above there are a number of generic social, economic, and technological changes that could potentially influence transport priorities in the longer term. These include:

- A growing and older population.
  By 2050, it is projected that one in four people in the UK will be aged 65 years and over - an increase from approximately one in five in 2019[30] This will have an impact on the design and accessibility of transport services.

- An increasingly 24/7 'always on' environment, heavily dependent on the internet.
  The internet has fuelled the ability to work, shop and play at all times of the day. Technology is central to this – people will need access to the internet and their files anytime and anywhere – including when on the train or bus. Being able to 'do something' when travelling by train is already recognised as one of the benefits of rail travel – it can be productive time rather than dead time[31]. For instance, 30 minutes on the train (or bus) could give you the opportunity to work, or organise your weekend, update your social media status, stream music, or do your weekly shop.

  This more seamless, 24/7 environment may blur the distinction between weekdays and weekends and require services later into the evening. It will also depend on good and reliable internet connectivity during a journey.

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

[30] Overview of the UK population: January 2021. ONS. 2021
[31] Rail passengers' travel time use in Great Britain. UWE Bristol. 2011

- Post-pandemic: a ‘new normal?’
  The pandemic has brought about changes to the way we go about our lives which have the potential to impact travel behaviour in the short and longer term. In addition to impacting on timetable and capacity requirements, this could also affect fare structures and finances. For instance, it requires season tickets that better match new, hybrid commuting pattern rather than traditional products that cater to the four-five day a week commuter of old.

- Urban living.
  In 2015 over 40 per cent of the total UK population was based in 11 city regions. Population projections from 2015 to 2025 showed city regions having a higher growth rate than the national average. Greater London, Bristol, the West Midlands, and Edinburgh city regions all have higher projected population growth rates than the UK average[32]

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

- The growth of the single-person lifestyle.
  Between 1997 and 2017 the number of people living on their own went up by 16 per cent to 7.7 million, while the UK population increased by only 13 per cent. By 2039, the number of one-person households is projected to rise to 10.7 million[33]. There is a basic human need for contact, and this won’t disappear simply because people live alone – if anything one of the net effects of the rise of one-person households could be a desire for more socialising and more frequent activities with others. Rail and bus could have a role in enabling this, but only if timetables provide attractive services that go where people want, at the time they want them.

- Environmental pressures – carbon reduction and an ever-increasing focus on sustainability.
  The move to net zero will require a complete shift in how all forms of transport are powered as well as the mix of public/ private transport. Public transport has an important part to play in the decarbonisation agenda – both in terms of reducing its own carbon footprint and in facilitating significant shifts from road and air to rail. The latter could be a real challenge given our research on

[32] Trend Deck 2021: Urbanisation. Gov.uk. June 2021
[33] The cost of living alone. ONS. 2019

existing travel suggests that (at present) sustainability is not a key driver of transport decisions – the challenge will be in putting carbon alongside considerations of cost and convenience[34]

Transport Focus
January 2024

[34] The journey towards sustainable travel. Transport Focus. 2021