Transport Focus – Written evidence (TTS0062)

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1. Introduction

Transport Focus is the independent consumer watchdog representing the interests of rail users throughout Great Britain; bus, coach and tram users across England, outside London; and users of the Strategic Road Network in England.

Working with transport providers and Governments across England, Scotland and Wales – and in partnership with our colleagues at London TravelWatch – we ensure that the users voice is heard. We aim to make a difference by being useful, relevant, consumer-focused and evidence-based.

This submission focusses on current and future use of public transport, barriers to use, and modal integration.

2. Current and future use of public transport

The Department for Transport (DfT) has been tracking use of public transport since the pandemic. While there has been a steady return of demand for bus and rail services they are both still considerably below pre-pandemic levels (around 75-80% of previous demand)[1].

Throughout the pandemic, and since restrictions have eased, Transport Focus has been asking passengers (and lapsed/non-users) about their future travel expectations and aspirations.

2.1 Bus Passengers

Transport Focus carried out an online survey in March and April 2021 into the views and experiences of over 10,000 current, fully lapsed and nonusers about bus services in Great Britain[2]. This looked at using buses during Covid-19, expected
bus use once things go back to normal, satisfaction with services and priorities for increased use.

We asked current users who had reduced their bus use and fully lapsed users to pick the aspects that would encourage them the most to use the bus more often. We found that Covid was still having an impact in terms of cleaning and other measures designed to reduce risk of infection. However, it was also very clear that traditional passenger priorities such as punctuality and frequency were still very much to the fore. See chart below.

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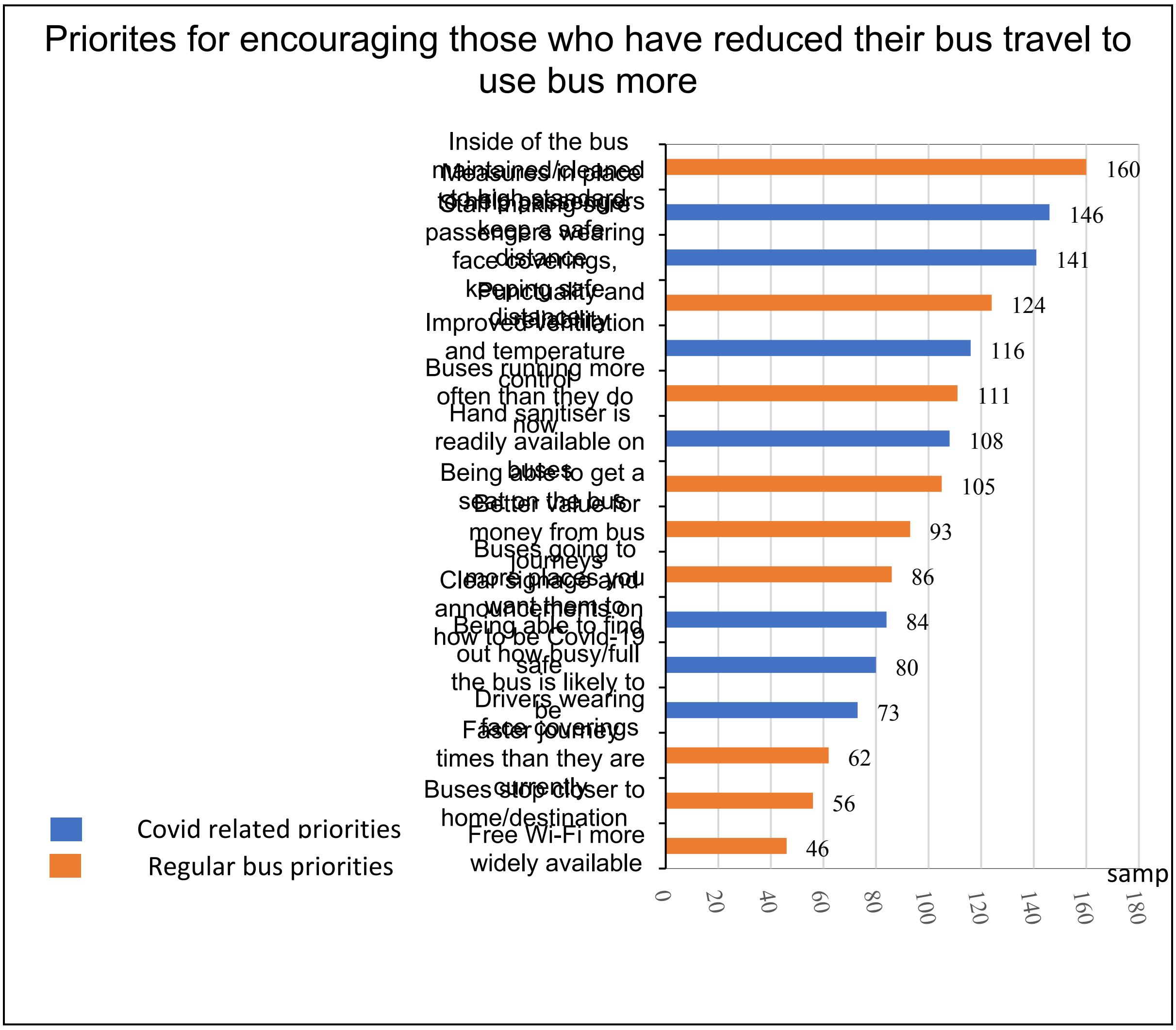
[1] Domestic transport use by mode.
[2] The route ahead: getting passengers back on buses. Transport Focus. 2021



Scores show importance relative to each other such as score twice as high as another means the item is twice as important: 100 = average level of priority

These priorities differed when looked at by age, with older respondents placing an even higher priority on Covid related safety measures – reflecting the higher risk from Covid in these groups.

More recent (March 2022 and as yet unpublished) research among bus users who hold a concessionary pass suggests that attitudes to Covid-19 is still having an affect on demand among this segment of the market. Half said that the way in which they use buses has changed since the start of the pandemic. 38 per cent say that they are using buses less frequently now than they were before this time, while 49 per cent say that the frequency of their bus use has not changed. Just 13 per cent are using buses more frequently. Of those using bus less about a third said it was because they felt bus was less safe than other modes. However, the main things that would encourage more bus use were if buses went directly to more destinations, or if they were more frequent.

So in terms of future demand for bus it is clear that there is still a need to address Covid safety, especially within certain market segments, but that the overriding need is still for a good 'core product' of punctuality, frequency, buses going to more places and better value for money. These are still very much in line with research conducted by Transport prior to the pandemic[3].

We are pleased that Government has chosen to focus its national bus strategy on passengers' priorities for improvement and that local transport authorities will be required to set targets against some of these. We have used our portfolio of research to help authorities and operators ensure their Bus Service Improvement Plans (BSIPs) and Enhanced Partnerships reflect the passenger interest: This has involved developing guidance documents and supporting webinars covering:

- passenger representation on BSIPs
- setting targets for BSIPs
- bus Passenger Charters
- what passengers want from BSIPs
- consulting on Enhanced Partnerships.

We will continue to work with authorities and operators, offering bespoke passenger research and advice as they seek to deliver on their commitments and meet their targets.

2.2 Rail passengers

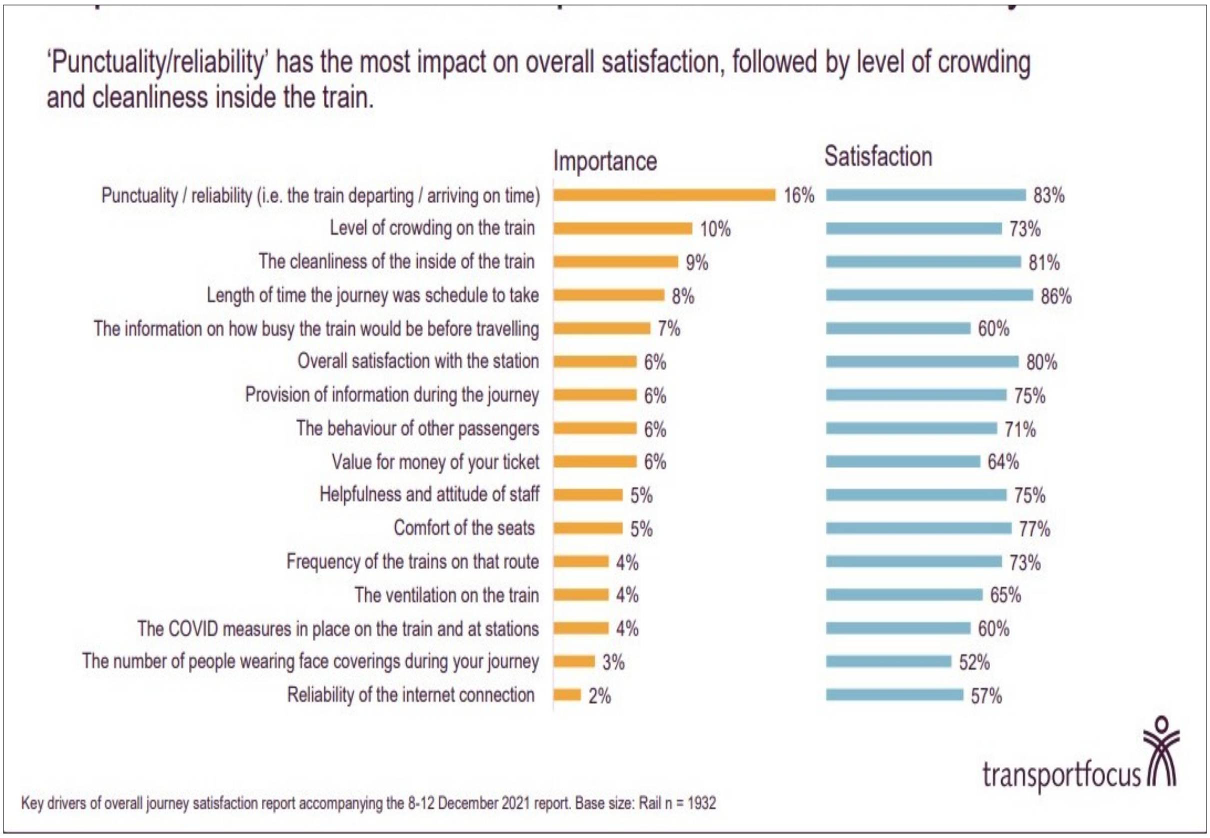
Transport Focus's research on priorities for improvement[4] and passenger satisfaction continually emphasises the importance of an affordable, punctual, reliable, frequent service on which you can get a seat or, at the very least, stand in comfort.

These form the 'core product' that passengers want to see improved. How well the industry delivers these goes a very long way in determining how passengers view the railway. The core product is key in determining passenger satisfaction – punctuality has the biggest impact on overall satisfaction while how the train company dealt with delays has the biggest impact on overall dissatisfaction[5]. Put simply: if you want happier passengers, run their trains on time.

The bulk of Transport Focus's research on passenger priorities was carried out before the coronavirus pandemic, but more recent research suggests that overall attitudes have not changed too much [6 & 7]. The core product is just as important

[3] Bus passengers' priorities for improvement. Transport Focus. 2020
[4] Rail Passengers' Priorities for Improvement. Transport Focus. 2020
[5] National Rail Passenger Survey (NRPS). Transport Focus.
[6] Rail and bus priorities: Transport User Community. Transport Focus. November 2020

now as before and - as seen in the chart below - punctuality is still the biggest driver of overall satisfaction[8], but there is an added emphasis on personal safety[9] and cleanliness. There is also a much more heightened awareness of personal space (or lack of) on board trains[10].



It is perhaps too early to say whether these represent a permanent change in attitudes or whether they will decline as people get used to a new Covid-normal – to some extent this will depend on an individual's general response to Covid. Transport Focus's *Travel during Covid-19 survey*[11] and our 'segmentation'[12] reports provide an insight into how divided views remain on Covid, with some passengers 'back to normal', but others, especially non-users, remaining more cautious. It is clear from these that the railway will have to work hard to get some people back on board.

Early indications are that the leisure market is recovering more quickly than commuter and business travel. Our research suggests that Covid has accelerated

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[7] Returning to rail: What passengers want? Transport Focus July 2021
[8] What drives rail passenger satisfaction? Transport Focus. 2021
[9] Perceptions of safety on public transport. Key drivers analysis. Transport Focus. January 2020
[10] Understanding attitudes to social distancing and face coverings on public transport report. Transport Focus. July 2021
[11] Travel during Covid-19. [weekly/fortnightly survey of travel behaviour and attitudes]. Transport Focus
[12] [Segmentation analysis breaks the Travel during Covid-19 research into five groups according to key behaviours and attitudes, including future use of public transport]

a permanent shift towards hybrid working which will make it unlikely that the commuter market will return to previous levels. However, it is still too early to assess the full implications of this.

2.3 Disabled passengers

Disabled passengers have seen improvements to the accessibility of services over time, and the transport sector is progressing. However, there are still some very real barriers and problems to overcome, especially with the physical design and layout of stations and rolling stock[13]. But it is also about confidence as well: will the train service run as planned, will the toilet be open, will staff be there to help, what happens if services are disrupted? This applies to all passengers but the consequences of getting it wrong can be much greater for some disabled passengers.

Covid has had an impact on confidence. Our research with rail passengers shows a gap between the perceptions of disabled people who had travelled and those who had not – with those travelling feeling that rail was much safer than those not travelling[14]. To some extent this gap between experience and perception reflects the efforts public transport operators made to help passengers travel with confidence and feel safe. But it also clearly highlights the scale of the challenge facing operators as they try to persuade people to return to public transport in future.

Better accessibility benefits all passengers, but it also opens new markets and income. In 2014/15 the Department for Work and Pensions estimated that disabled people and their families in the UK had an aggregate annual household income of £249 billion[15]. The campaign group Purple estimates that the transport sector loses up to £42million each month through not being accessible[16].

There are some overarching aspirations that we believe are important:

- Engagement: it is imperative that those with a lived of experience of disability are consulted and heavily involved in the design of services.
- Staff training: embedding a culture of 'how can we help' rather than 'are we compliant with the regulations'.
- Awareness: improved awareness of disability, especially non-visible disabilities.

3. Connectivity

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

[13] Disabled rail passengers research. Transport Focus. 2019
[14] Accessible transport: unlocking a better normal. Transport Focus 2021
[15] The spending power of disabled people and their families in 2014/15.
[16] https://wearepurple.org.uk/the-purple-pound-infographic/

and how long will it take. This applies to the whole door-to-door journey rather than just individual elements.

Our research suggests that expectations of integrated journeys were often low, and passengers preferred to avoid them where they could[17]. Integrated journeys that involved more modes of transport and stages of travel were perceived to be more risky, stressful and more costly. The perceptions were not only fuelled by any personal experiences on public transport, but also by other people's experiences and news coverage about transport disruptions. Thus, it can seem 'common sense' to avoid the 'gamble' of complex or multi-stage journeys by public transport and take the car.

We believe there are four key areas where integration can be improved:

3.1 *Information - giving passengers the tools to proactively plan their journeys and make them smoother and less stressful overall*

There are two key aspects to planning journeys: original research (checking routes, fares, options and so on) and checking to see if a pre-planned or a regular journey is running as it should.

Our work on rail suggests that websites and apps are the starting point for many when planning a journey. Passengers want them to give clear information on which they can make an informed decision, use language that they understand and instil confidence (including that they have bought the right ticket)[18]. Putting more data into the public domain can help with journey planning[19 & 20]. Punctuality and crowding data can help determine choice of train or time of journey amongst those who have flexibility when they travel – it can also help to manage expectations of those who do not have such flexibility. The importance of websites and apps showing how crowded trains are was also something highlighted in research on travel during Covid – where 'space' moved from being a comfort factor to a personal safety factor[21]. Good journey-planning tools can help to empower consumers and to build trust in the system

On bus our research shows that delayed or cancelled buses have a real impact on passengers in terms of being late for work, late picking up children, or late for medical and other appointments[22]. As well as practical issues, passengers talked about the anxiety and stress that this brings.

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[17] Transport integration in Scotland. Transport Focus. 2014
[18] Ticket Retailing Website Usability. Transport Focus. 2011
[19] Putting rail information in the public domain. Transport Focus. 2011
[20] Presenting 'right-time' performance information to rail passengers. Transport Focus. 2013
[21] Transport User Community – website and crowding information. Transport Focus
[22] Bus passengers' experience of delays and disruption. Passenger Focus. April 2013

This research gives a strong sense that bus passengers feel powerless when faced with delays. There is, many feel, no means of finding out what is going on – as one passenger put it: "It's mental torture sometimes at bus stops working out whether to stay or whether to go." Providing information that empowers passengers to make an informed decision in these circumstances will make a significant difference. Passengers strongly favour real-time departure displays at bus stops. These were felt to be inclusive and reassuring and allowed people to make an informed choice. Some favoured an App as long as it could be tailored to provide updates on 'my journey'.

3.2 Travel environment - to improve the comfort and security of rail and integrated travel

Clarity and ease of use come through as a key issue when speaking to those who do not use rail, or who do so infrequently. Transport Focus's research[23 & 24] shows that the main barriers to increased rail use are an assumption that the door-to-door journey would take longer, a belief that using rail would cause extra "hassle" compared to using the car, and the perceived cost of the ticket. Non-users tend to over-estimate the negatives – such as journeys that take longer, cost more or are less punctual than they actually are.

Concerns over personal security can also be placed into this category. Good lighting, CCTV, clear sightlines, help points and a well-maintained environment can all help make people feel safe. While most rail and bus passengers tell us they are broadly satisfied with their personal security on the bus or the train – of those that weren't, the main cause was the antisocial behaviour of other passengers. This ranged from people putting feet on seats or playing music loudly to drunken/rowdy behaviour. This is an even bigger issue for disabled passengers[25].

We recognise that this is not an easy problem to solve – it's one that has many stakeholders and dispersed ownership; and one that will differ from region to region. Nonetheless, we would urge bus companies, local transport authorities, the police and central government to get together, think collectively and develop policies and procedures to minimise the incidence of passenger concern during bus journeys.

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[23] Integrated Transport – perception and reality. Transport Focus. 2010
[24] Transport Integration in Scotland. Transport Focus. 2014
[25] Analysis of bus passenger satisfaction for those who have a disability. Transport Focus. 2016; and
Disabled Rail Passengers research. Transport Focus.2019

3.3 Infrastructure and service provision - to make rail and integrated travel as accessible and as tailored as possible around passengers' needs

A one-size-fits-all approach to integration will not work. At some rail stations for instance, the solution may be better walking or cycling provision, at others it may be bus connections and in some places it may involve car parking/park and ride.

- *Active travel*

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

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

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

- *Rail Bus*

  There is scope for tying rail and bus timetables into tighter, more mutually supportive arrangements. The advent of the new national bus strategy[26], designed to improve the interface between local authorities and bus companies, could help with this in England.

  The existing PlusBus scheme provides a degree of rail-bus ticket integration. Our research in 2015 showed that those who used it were satisfied with it but that there were relatively low levels of awareness in general[27]. We believe the railway should work with Traveline, the new custodian of PlusBus, to develop the product. In particular, help push forward current plans for a digital ticket that can be bought online and shown to the bus driver – addressing one of the historic problems that PlusBus cannot be purchased on the bus.

  Other aspects include interchange facilities at stations. For instance, are bus stops provided and are they situated in the optimum position, are the

[26] Bus Back Better. DfT. March 2021
[27] PlusBus user research report. Transport Focus. 2015

walking routes from the bus stop to the railway station clearly signed, do they offer level access, and is the link secure and well lit?

- *Car parking*
  For some rail passengers driving to the station remains the most viable and practical means of accessing the railway. Bus services may end too early in the evening or not be provided at weekends or fears over personal security or bad weather may inhibit active travel. For these reasons, car parking facilities at stations remain important. Going forward, station car parks can also provide options for enhanced electric charging facilities.

  Our research[28] suggests that:
  - a lack of car parking space could actually suppress overall demand for rail.
  - if passengers couldn't park at their station some would drive to the next station or drive all the way to the destination - the net effect being to increase car use. Some would also travel earlier in order to get a space – which then further adds to congestion on board the train by virtue of getting people to travel at busier periods when they don't need to.

  In 2020 Transport Focus also explored user and non-user views about how park and ride schemes could help to reduce the number of car journeys on the motorways and 'A' roads managed by National Highways – the strategic road network (SRN)[29].

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

  We believe the railway should explore the potential for park and ride options with National Highways and work with the organisation to review the adequacy of signage from the SRN to railways stations close to the road network

3.4 Ticketing, costs and fares - simplifying the purchasing process for passengers

Transport Focus has a series of research covering contactless/pay-as-you-go ticketing[30]. It is clear that this is valued by passengers – many of whom point to

[28] Getting to the station. Transport Focus. 2007
[29] Park and ride for Highway's England's roads: a solution to congestion? Transport Focus. 2020

the success of the Oyster/contactless scheme in London. The multi-modal and fare-capping aspects of such schemes are of particular value as they simplify ticketing choices while ensuring the passenger gets the best fare.

4. Future trends that could affect public transport

In 2012 Transport Focus explored potential social, economic and technological changes that might influence transport priorities in the longer term[31]. Several key themes were identified, some of which have emerged more strongly now.

- 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[32]. This will have an impact on the design and accessibility of 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. 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[33]. 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 – something that our research shows can be decidedly patchy on trains at times[34].

- 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

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30 Smart ticketing in the north: what do passengers think?. Transport Focus. 2016; and Paying for public transport with contactless – what do passengers think?. Transport Focus. 2016

31 The Future of Transport. Transport Focus and Go-Ahead. 2012
32 Overview of the UK population: January 2021. ONS. 2021
33 Rail passengers' travel time use in Great Britain. UWE Bristol. 2011
34 Keeping connected: passengers' experience of internet connectivity on Great Britain's railways. 2020

industries, people will expect it to provide more personalised information – for example, personalised disruption information, prompts on delay repay compensation, and targeted special offers

- Flexible working and redefining the workplace.
  How people work is something brought into sharp focus during Covid. Our research on rail suggests that Covid has accelerated a shift towards hybrid working – with an increase in those expecting to work from home two to three days a week[35]. Our work suggests that this is a permanent shift in working patterns rather than a temporary reaction to Covid.

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

- 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[36].

  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 – that is 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.[37]

- The growth of the single-person lifestyle.

[35] Future rail commuting survey. Transport Focus. 2021
[36] Trend Deck 2021: Urbanisation. Gov.uk. June 2021
[37] How '15-minute cities' will change the way we socialise. BBC. 2021

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[38]. 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 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.

- The search for value
  For decades there has been an expectation that the next generation will, in economic terms, have it better than the last. However, it is increasingly being argued that we have reached an end to this assumption, and that today's children may have a lower quality of life (for example, in terms of cost of housing, pensions, job security, rising social care costs). Clearly this will not affect everyone, but it will impact on a significant proportion of the population for whom value for money will assume even more significance. People may increasingly want to compare costs by different transport modes and look at what they are getting for their money.

- Environmental pressures – carbon reduction and an ever-increasing focus on sustainability.
  Rail and bus have an important part to play in the decarbonisation agenda – both in terms of reducing their own carbon footprint and in facilitating significant shifts from road and air. The latter could be a real challenge given our research on existing travel suggests that sustainability is not a key driver of transport decisions – as previously mentioned, that is more dependent on cost and convenience. The challenge for public transport will be getting people to consider carbon alongside cost and convenience[39].

May 2022

[38] The cost of living alone. ONS. 2019
[39] The journey towards sustainable travel. Transport Focus. 2021