**Fforwm Rhanbarthol Rhanddeiliaid Cymru a'r Gororau**

**Wales and Borders Regional Stakeholder Forum**

**28/09/2022**



**Adroddiad o’r cyfarfod**

**Meeting report**

Wales and Borders Regional Stakeholder Forum

The forum met on the Wednesday 28th September 2022, between 11am and 12pm.

**Attendees**

**Forum Members**

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| Heledd Walters  | Network Rail |
| Anne Elias | Mid Wales Growth Forum |
| Sean Croshaw | Transport for Greater Manchester |
| Sarah Reardon  | Network Rail |
| Toby Rackliff | West Midlands Rail Executive |
| Christian Schmidt | Monmouthshire Council |
| Val Hawkins | Mid Wales Tourism |
| Peter A Bethell | Birmingham Council |
| Heather Bolton | Telford & Wrekin Council |
| Richard Whiting | Heart of Wales Line CRP |

**Transport for Wales**

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| (Chair) Nichole Sarra | Stakeholder Manager  |
| Paula Bowen | Community Engagement Officer  |
| Andrew Sherrington | Head of Bus Network & Service Development |
| Lewis Brencher | Director of Communications & Engagement |
| Jonathan Jones | Commercial Manager |

**Note from the Chair, Stakeholder Manager, Nichole Sarra**

*“I am very pleased that the Forum session went very well. Can I thank members who were able to attend for your time and contributions and also the presenters who engaged us across a range of topics. We had useful discussions of opportunities and key challenges for the future including the changed model for rail operations and rebuilding confidence in public transport. Please can I encourage your continuing contributions to these topics – time in the session is quite short and also to include those not able to join us; to benefit from the panel’s wide experience and advice to support Transport for Wales to plan during this important time.”*

**Agenda**

1. **Chair, Nichole Sarra, Stakeholder Manager, Transport for Wales**

**Welcome**

Welcomed members to the quarterly forum and provided an overview of housekeeping and the new format for the regional being trialled for the first time, before introducing the first agenda item

1. **Severn Estuary Earthworks Update**
**Heledd Walters, Project Manager for Strategy & Planning at Network Rail**

Heledd presented an update on the programme of geotechnical intervention work that took place over a significant summer blockade on the Newport-Gloucester railway line, addressing a three-mile section of the track. Heledd provided an overview of the background that led to this £25m intervention work investment, including the significant number of earthwork failures that caused the railway line to temporarily close. This included five major landslips between 2020-2021, which led to over 200,000 delay minutes to passengers on services on this line.

` Whilst Network Rail had carried out some intermediate interventions to reopen the line, including emergency remedial work; installing additional barriers and failure detection monitoring equipment, the need to address the longer-term solution on this key route connecting South Wales to Gloucester, the Midland and the North, was necessary. Heledd noted that the project team were able to complete a quick turnaround working closely with TfW colleagues they were able to plan the significant disruptive access opportunities with 10months to go from conception to construction. Ground investigation work was carried out in September 2021 and Network Rail continued to monitor ground water level because saturated areas continued to contribute to earthwork failures. Heledd also discussed the ecology and environmental considerations that went into the planning of this project.

Work over the six-week summer blockade included working in high-risk areas and removal of failed material, hand scaling, installation of netting systems and erosion matting due to quality of rock erosion and drains installed in slope faces to manage ground water seepage. A slope regrade, using natural material including the removal of 17,000 tonnes of material removed and recycled at Westbury.

Everything was based on estimation but lucky the bedrock was shallower than anticipated. Crest anchors and bolt complete with intermediate bolt installation underway. Network Rail also installed a line open barrier for future works to conduct work without impacting trains in the coming years.

Work on the design of the next phase of work is underway and will be completed during Summer 2023. Subsequent phases of the project will continue into Control Period 7, with further investment. A video of the work completed to date was played at the end of the presentation with Nichole noting how the drone footage had impressively captured the work to date.

**3.Flecsi, Bus Team**

**Andrew Sherrington (TfW), Head of Bus Network & Service Development**

Andrew presented an overview on fflecsi, with a further focus on the Newport pilot scheme. He said that Wales was seen as a trail blazer for the rest of the UK in terms of Demand Responsive Travel and explained how this has been deployed.

Andrew advised services grew very quickly however, noted Cardiff did drop out. He explained that the pilots in the right locations can create access to public transport where they do not have it, creating quicker journeys. Newport was an initial pilot as a response to Covid. Then Cardiff, Rhondda, Denbigh, Prestatyn, Pembrokeshire, Conwy, Blaenau Gwent, Holywell, Llyn Peninsula and an expansion to the Newport scheme (to really evaluate the urban environment) followed. Important to note these services were being delivered during a difficult period (Covid).

Fflecsi is a bus, but more of an app, and each scheme involves a four-way collaboration to be successful between TfW, Via and the Local Authorities promoting an open, honest collaboration. Important to distinguish that is it is a method of delivery and not just a bus.Three types of service offered: Newport-Urban ‘gap filler, Denbigh-Suburban and Conwy-Rural connectivity. Denbigh is statistically one of the best in UK based on wait time, journey time and passengers. In Conwy using a zonal system they have unlocked employment opportunity for those needing to go to leisure and hotelier jobs, so able to accommodate more journeys. High level stats to include ‘bwc a bus’ who is now part of the fold.

Newport pilot-steep growth tracked. The service was popular in Newport with nine vehicles in system. To meet demand, Andrew noted TfW would have needed to add more vehicles. Fixed line bus services need to be increased to take this demand away as not a mass transit solution. He commented that we need to allow buses to do the mass transit, with Fflecsi doing the bits in the middle.

Highlight in Newport: 47% of people said if they had not used fflecsi they would have made journey by car or taxi. Car users said they would use fflecsi over their car. Data is rich because on traditional bus travel you cannot see who cancelled or did not travel however, with fflecsi and the booking system this data is available. TfW has learned through reviewing this valuable information which has contributed to the success of other schemes. It demonstrated how a mixed environment of demand response and scheduled bus services can operation in a complimentary way.

fflecsi is not a cheaper alternative to scheduled services. Urban schemes should be procured as part of a ‘designed’ network and fflecsi identified new unknown movements which have now been adopted into the Newport Bus scheduled network. fflecsi is very data rich identifying greater movement not identified before The Newport fflecsi pilot was rich in informing and helping us understand the limits of what this type of service can be achieved.

**4. Ticketing and Demand Recovery (post-covid)**

**Johnathan Jones (TfW), Commercial Insight Manager**

Jonathan provided a presentation on the levels of post-Covid demand recovery across the TfW rail network (with a focus on Borders specific routes) in comparison to pre-Covid demand.

The journey demand back in March/April 2020 and demand for transport generally hit the floor with only essential journeys being made by passengers. Jonathan displayed graph and noted the various peaks and troughs for the best part of a year through Covid with some easements before Omicron. Increase in demand for the last 7-8 months, with no lock downs or restrictions *(slight drop in demand on charts presented related to industrial strike action)* with passengers returning to services.

Generally, across the network pre-Covid v current demand has not surpassed 80% of pre-Covid levels due to factors including hybrid-working. However, revenue has recovered to a greater level linked to the recovery in the leisure market and where passengers are now hybrid working from home or other places of work with relief from commuting. Weekend leisure market is outperforming weekdays. Revenue however has surpassed pre-covid levels at 94% linked to recovery in the leisure market. When people travel for leisure (social events, hospitality or retail) they travel for longer, evidenced with an increase to 26.3 miles in comparison to 23 miles pre-Covid.

Jonathan presented Mid Wales, North Wales, South Wales and Borders comparison data. Mid and North seeing a stronger return of demand in comparison to pre-COVID levels. Mid and North have surpassed demands levels post covid due to leisure even during strike action, with high level of passengers wanting to use our network.

South Wales and Borders; very different particularly in and around Cardiff and Swansea although leisure has increased, it was commuter journeys that drove demand so with that reduction in commuting this has slowed recovery and has been much more affected by strike action.

Revenue: Mid and North has performed in line with and regularly exceeded (meeting) demand recovery pre-Covid levels however, the South of the network has shown a slower rate of recovery however, spending more time on leisure travel hence spending more money pushing up revenue. Passengers are seeing less cramped trains and less overcrowding so more prepared to get on trains encouraging them to spend money on the weekends to travel. Noting a strong difference between week and weekend demand. Passengers no longer have same level of fatigue due to hybrid working so more inclined to travel on the weekend.

Miles per journey: clear change (presented data over five periods till the start September 2022) in average distance travelled per journey. North - slight increase, mid - slight decrease, with south much greater increase for miles per journey travelled choosing spare time to trave increased to 46%. Revenue outperforming demand in South Wales. North and Mid seeing revenue recovery in step with demand.

Average contribution of ticket type over last five periods: Season tickets north and south although apparent in Mid has reduced as no longer commuting as before, passengers no longer planning their work and concluding a 2-day full price ticket is cheaper than season ticket. Other ticket types linked to leisure. Advance market share has increased which make up for the drop in season tickets. Leisure travel purposes tend to plan and look for cheapest option. Increase in reduced tickets turning up for leisure on the day and not in peak times travelling outside of commuting window. Continuation of looking at this pattern to see if there is change moving forward.

Demand contribution: Saying the same story. In South, the drop in journeys made pre-Covid with season tickets to now showing how commuting demands has fallen away.

Summary: Across TfW network remains below pre-COVID but has shown a stronger recovery than demand. Leisure travel; travelling further than pre-COVID contributing to increase in yield. Trend is apparent across Borders segments with Mid and North demand and revenue have recovered.

South Wales has historically seen more revenue on commuter journeys to generate demand due to hybrid working however, leisure is proving resilient within this segment leading to revenue recovery outperforming demand. In the South in particular, we have witnessed a decline in season tickets linked to commuting with the advance market increasing in particular North Wales.

Drivers behind this is Revenue Management Strategy APOD (Advance Purchase on Day) and Demand Advance Market which open 12 weeks prior to journey. However, we have changed this now to five minutes before the journey departs. If demands fall or increases this will drive price to try to entice demand.

**Q1**. (CS). If you are saying let us introduce advance tickets five minutes before the train journey then you need to think about bringing flexibility to the timetables? **A**. (JJ). The APOD project has only been a trial on a number of trains helping us obtain specific data on how people are travelling and the services on which they are travelling. Standard ticket allows passengers to travel but does not tell us the service on which they are travelling. The advance tickets come with reservation data so gives us an idea to have an idea what demand is like. Project on small number of services and need to be aware that our timetable is robust. The option is turned off for large events as we are aware that these journeys will need to be planned for. If anyone would like more information, JJ is more than happy to liaise directly with them to provide more data.

**Q2**. (CS). With regards to APOD have you considered having a slot that is slightly wider rather than booking for individual trains, I think it should be explored. **A.** (JJ) the APOD is a trial, and we are looking at other options and will look at what has worked and what has not worked and how we can improve and what can be offered within it. What we have to be careful is that this does not infringe on other products such as saver returns, so a level of cross offer to be examined by Revenue Management team.

**Q.3 RG:** Just to give some reassurance regarding CS question, this service was introduced with Cross County many years ago and it’s been a success with most feedback from customers is the alternative to an advance ticket is a walk up ticket at the station that is a set price and although the advance ticket is only a marginally or sometimes significantly cheaper, they appreciate the gratitude for being able to buy these on their walk to the station. Appreciate TfW is in a trial situation and if CS would like to discuss how we have manged to get customers on board with this this then please get in touch.

**Q4.RW:** With regards to Mid Wales reaching 100% of pre-COVID levels, in terms of the bar graph I would remind you that showing that success, I would say that with Heart of Wales line we have further scope to improve. Carriages are currently single carriages on the Heart of Wales line.

**A.JJ:** We’re not suggesting that 100% is a success, it is just a benchmark but shows that people want to get back on these trains and where we see these levels return commuting is changing and we need to look at how to entice people travelling for work purposes but for leisure people are already keen. We will be looking at can we go beyond that 100%, which is certainly what our marketing team are looking at.

1. **AOB**

Nichole shared the link to the feedback survey in the Microsoft Teams chat following the change to the forum format and encouraged members to complete it. Nichole closed out the meeting by thanking all the members for attending and encouraging participants to put forwards suggestions for future agenda items.

## Forum digital chat highlights

Unfortunately, due to a technical issue the Microsoft Teams chat during this forum was unable to be retrieved.

## Next Regional Stakeholder Forum

The next Wales & Borders Regional Stakeholder Forum is scheduled for **Wednesday 14th December 2022**. The meeting will be held virtually over the Microsoft Teams platform between 11am and 12pm.