GM Rail

TravelWatch NorthWest
12th March 2024

Helping rail to find it's feet in a post Covid world

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BEE NETWORK

Transport for Greater Manchester

Items to cover

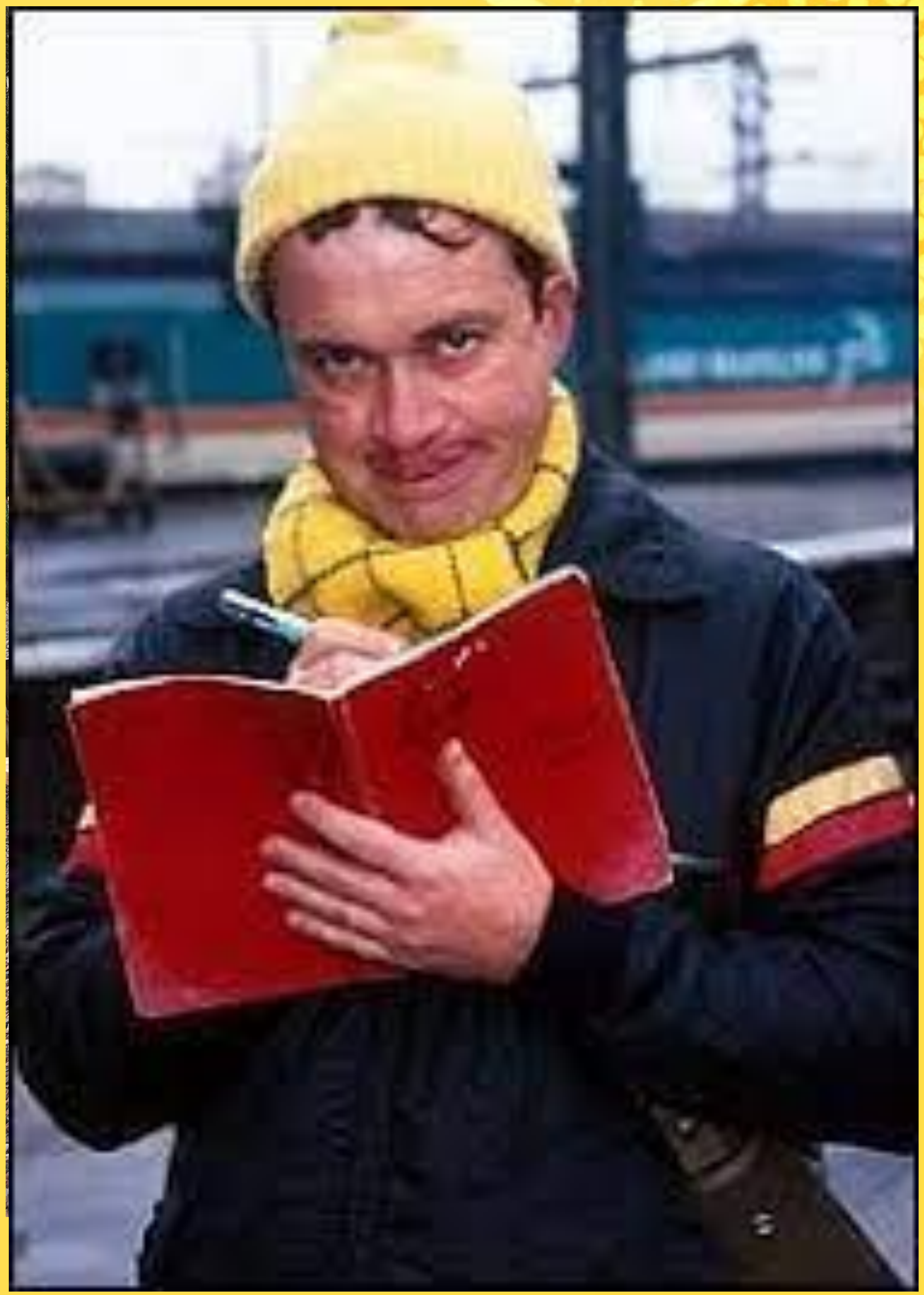
- ✓ Introduction
- ✓ What did the railways ever do for us?
- ✓ What does the “new normal” look like for rail?
- ✓ What’s rail’s future in GM?
- ✓ How do we rebuild rail in GM?
- ✓ Data, data, data
- ✓ Summary

Introduction – me!

Consultant for 26 years, working on:

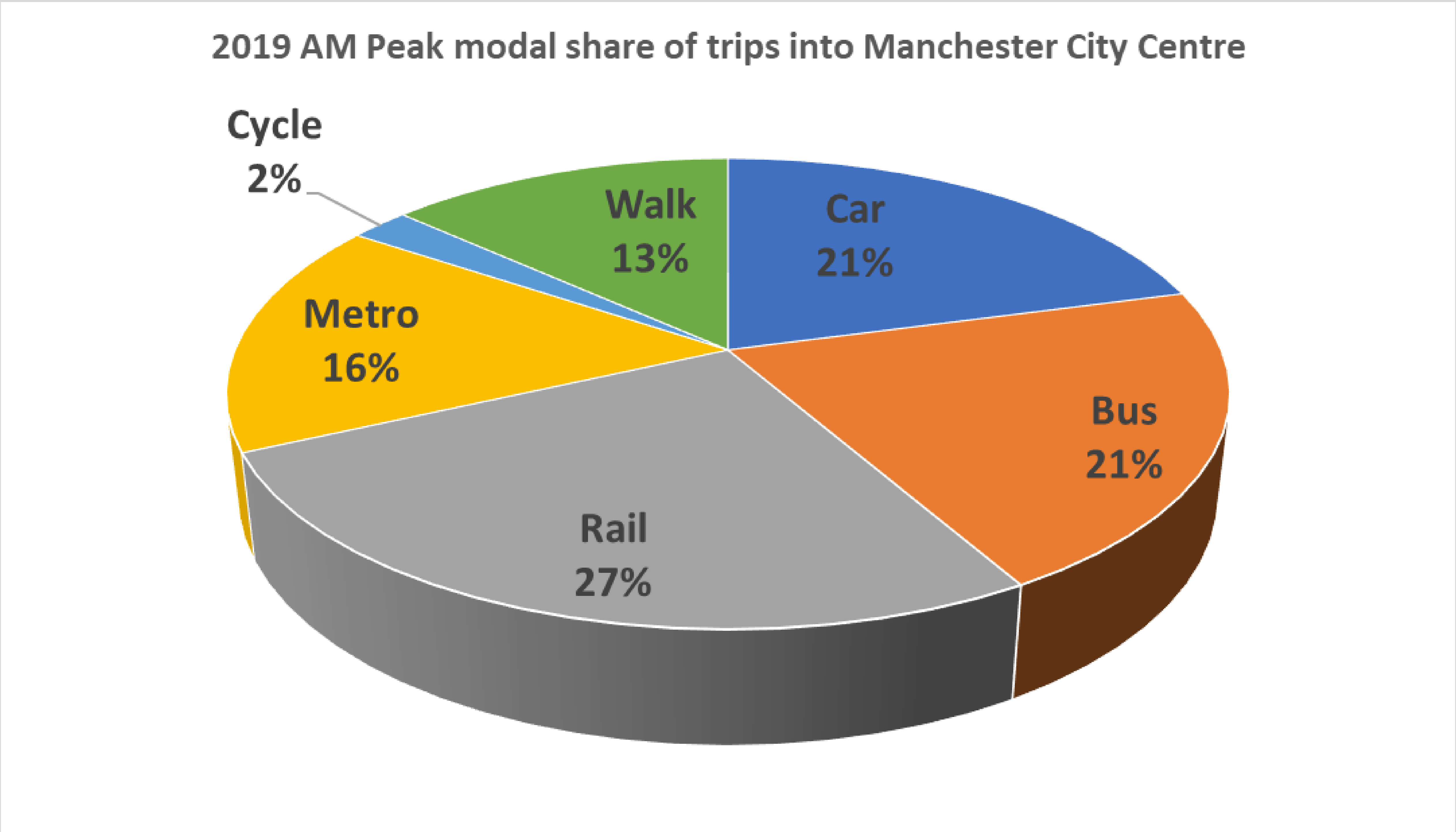
- HS2
- NPR
- New stations
- New services
- TransPennine electrification (in 1992!)
- NT & TPE refranchising, twice!

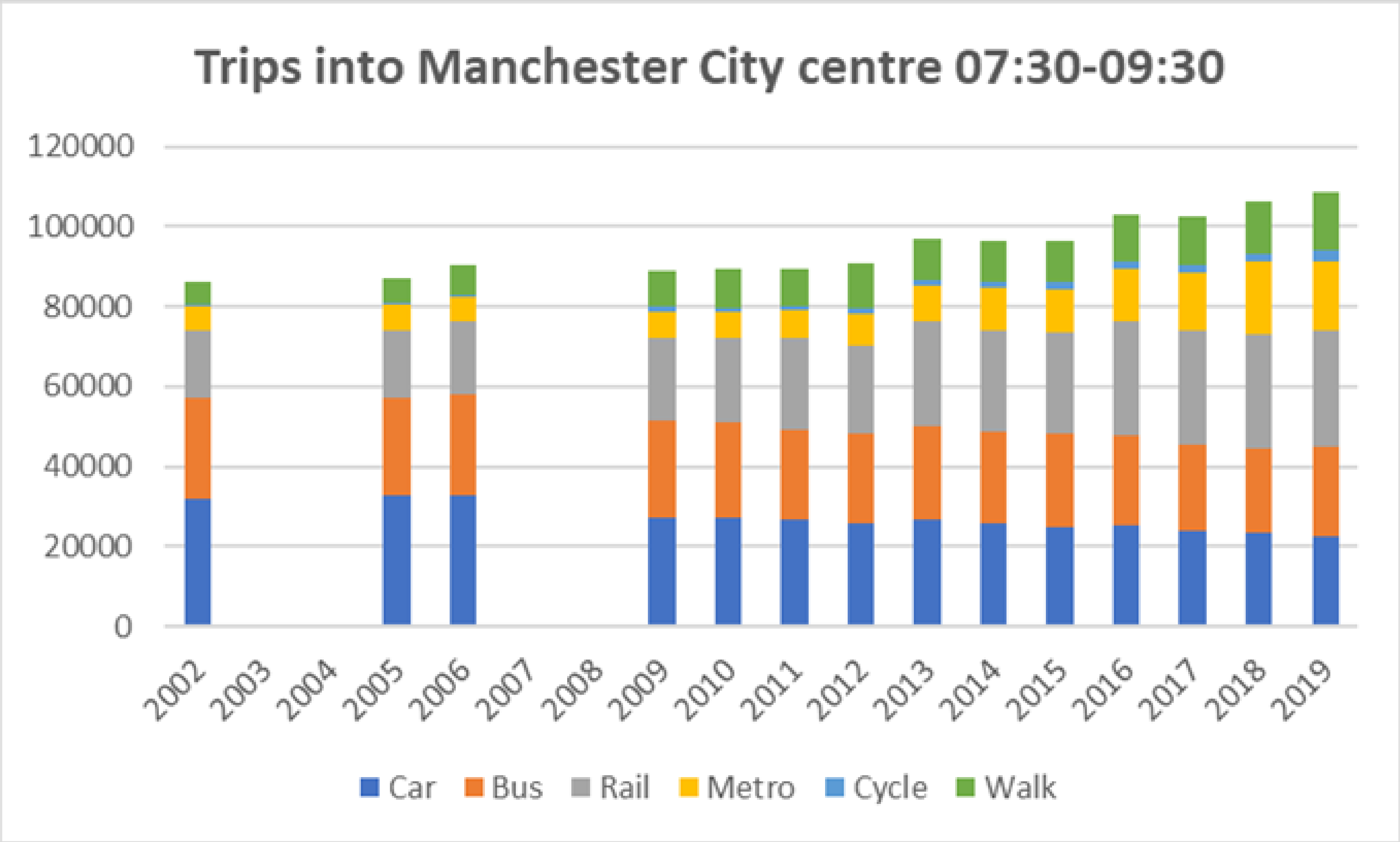
Joined TfGM in 2015, firstly as Rail Strategy Manager, now Strategic Rail Advisor



What did the railways ever do for us?

Rail was growing and key to Manchester city centre

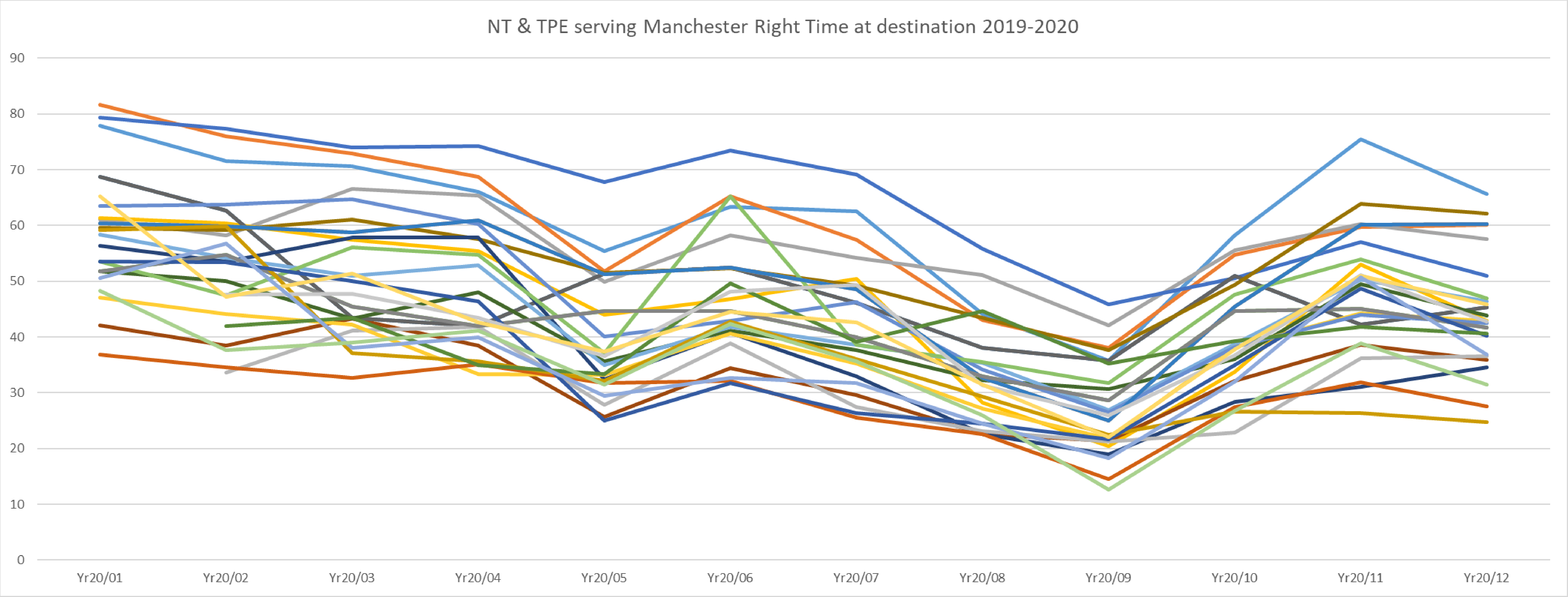




- Rail + Metrolink highest steel rail based modal share into city centre outwith London
- Manchester "peak car" reached in about mid 2000s
- Rail demand into city centre peaked in mid 20teens

Source: TfGM HFAS counts

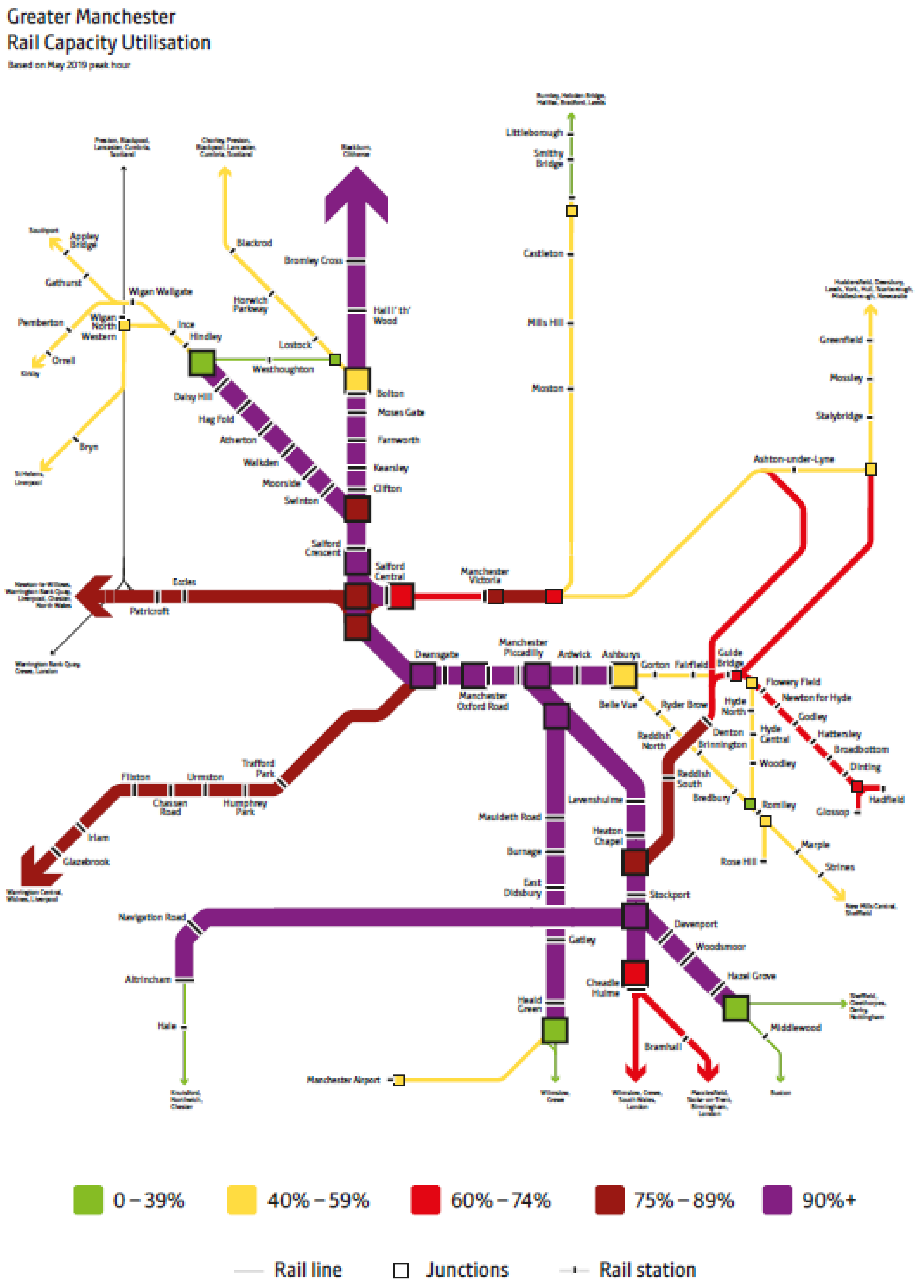
But the quality of product needed attention…..

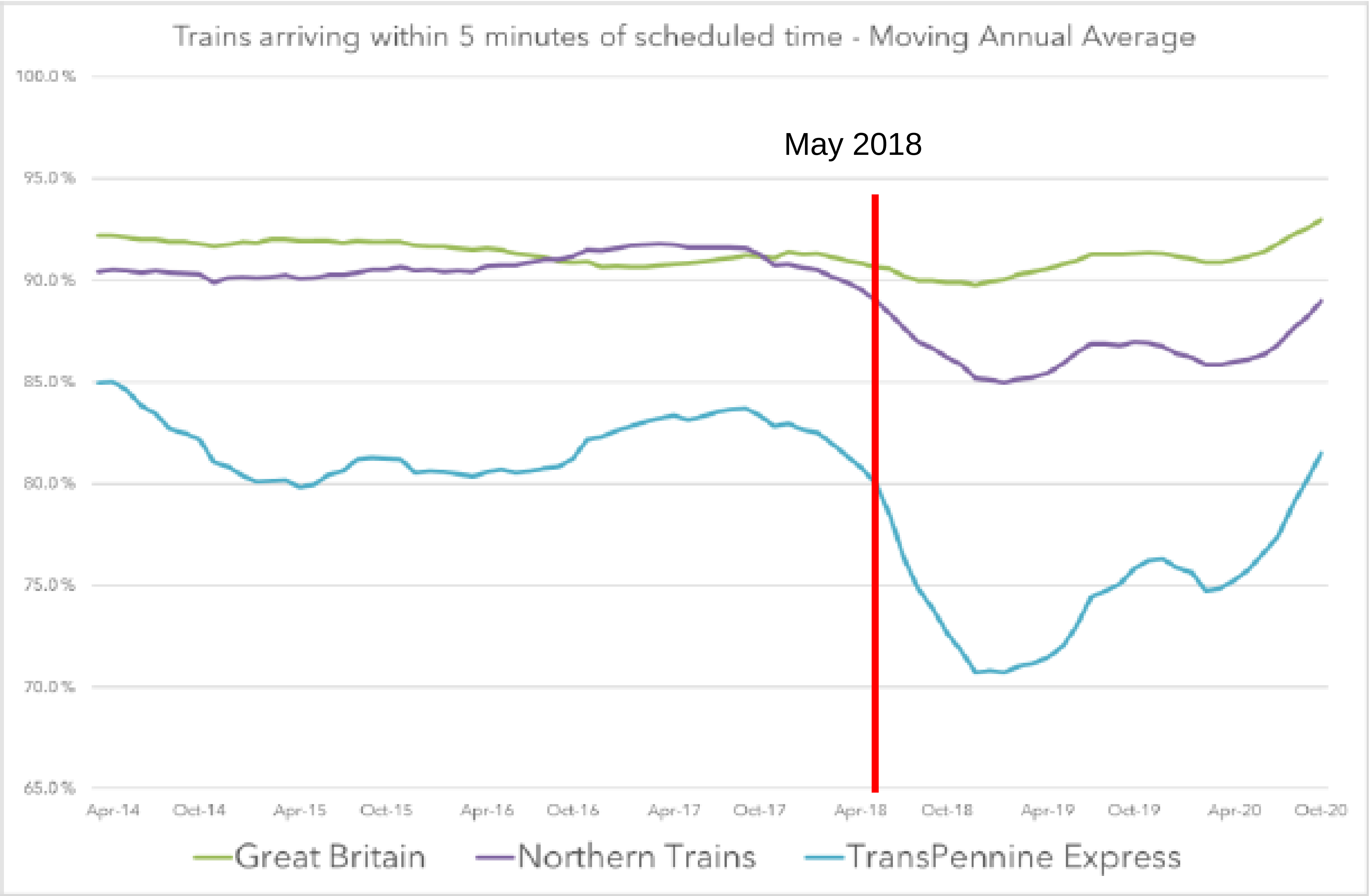


- Overcrowding
- Poor quality stations
- Reliability poor and drifting downwards

Source: TfGM analysis of Network Rail Right Time at destination data (NT & TPE only)

We were pushing the network too hard.....





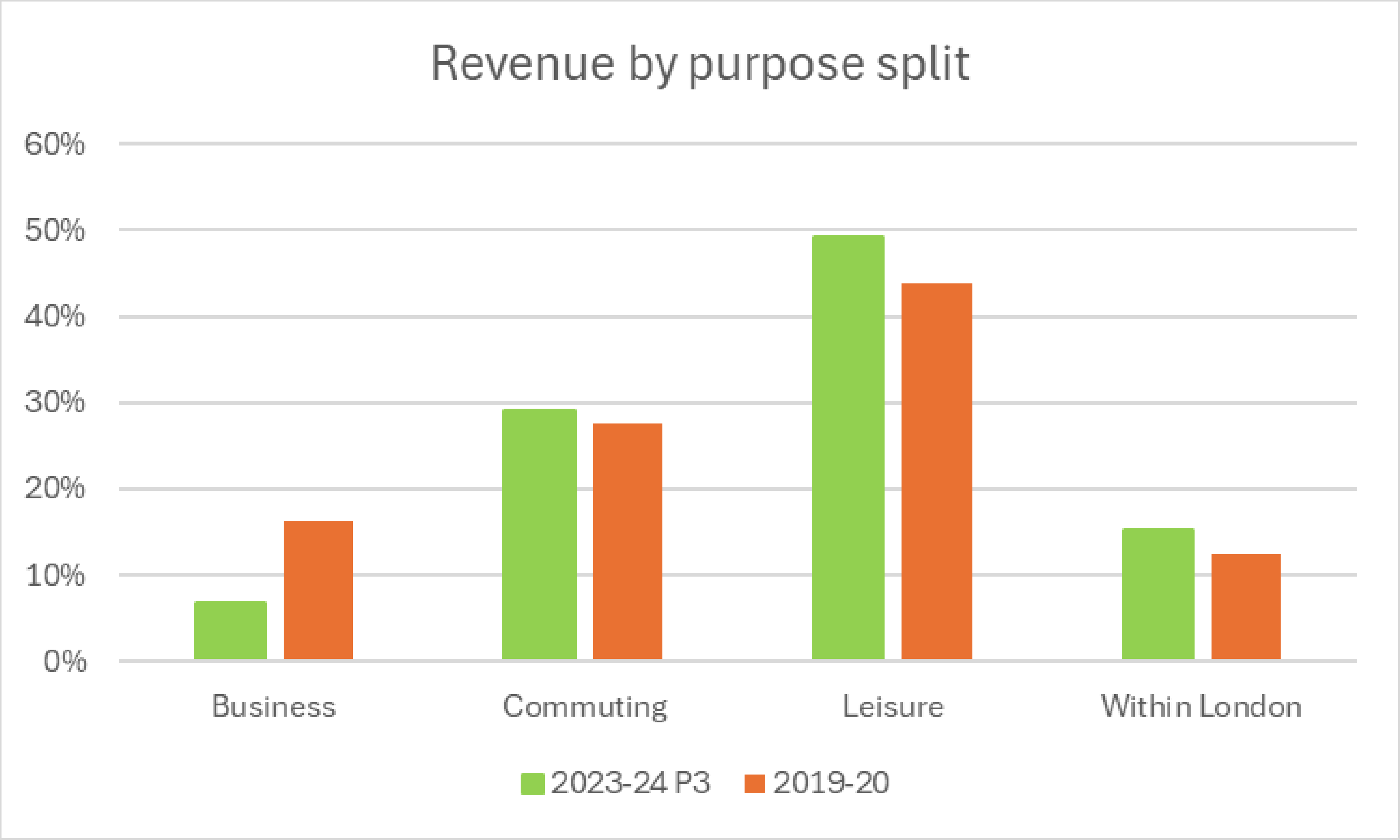
Type of line	Peak hour	Daily period
Dedicated suburban passenger traffic	85%	70%
Dedicated high-speed line	75%	60%
Mixed-traffic lines	75%	60%

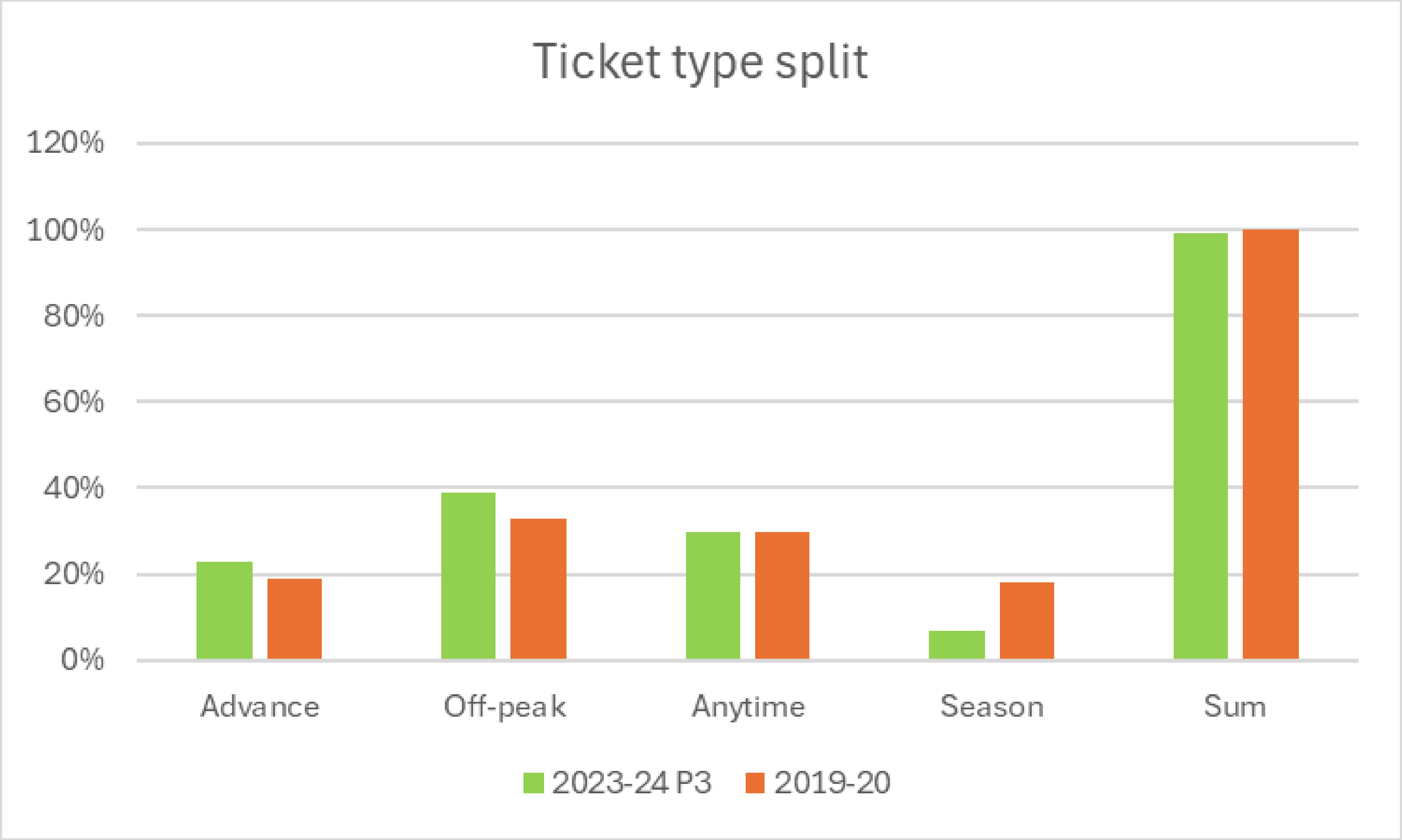
- Capacity Utilisation Index >75% spells disaster on a mixed use railway in the peak – we were planning for 90%+ all day!
- Why were we surprised what May 2018 led to?
- And Ordsall Chord only made it worse!

Source: TfGM analysis of network capability based on May 2019 timetable/Manchester Rail Task Force January 2021 consultation document

What does the “new normal” look like for rail?

National rail journey purpose/ticket type recovery

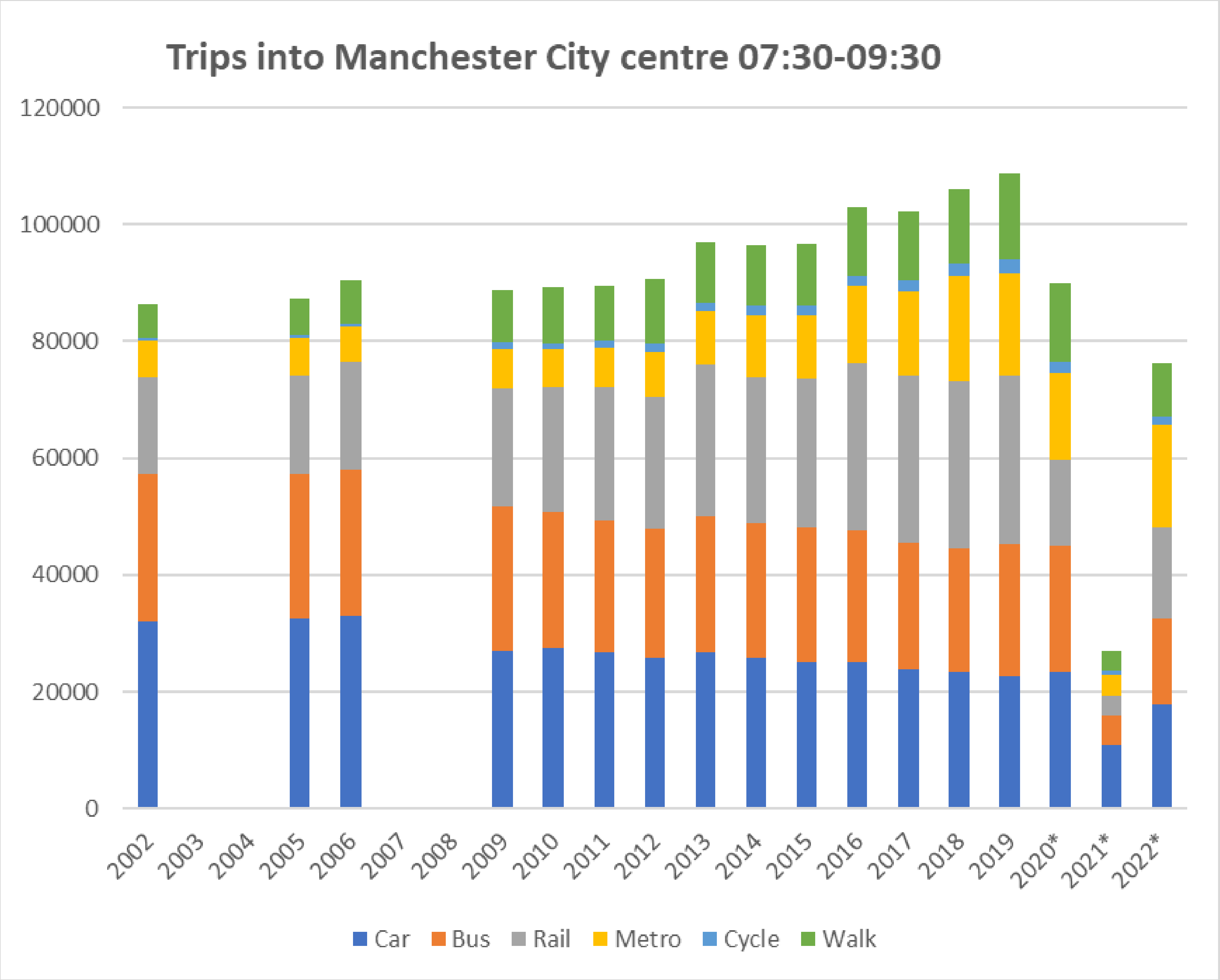


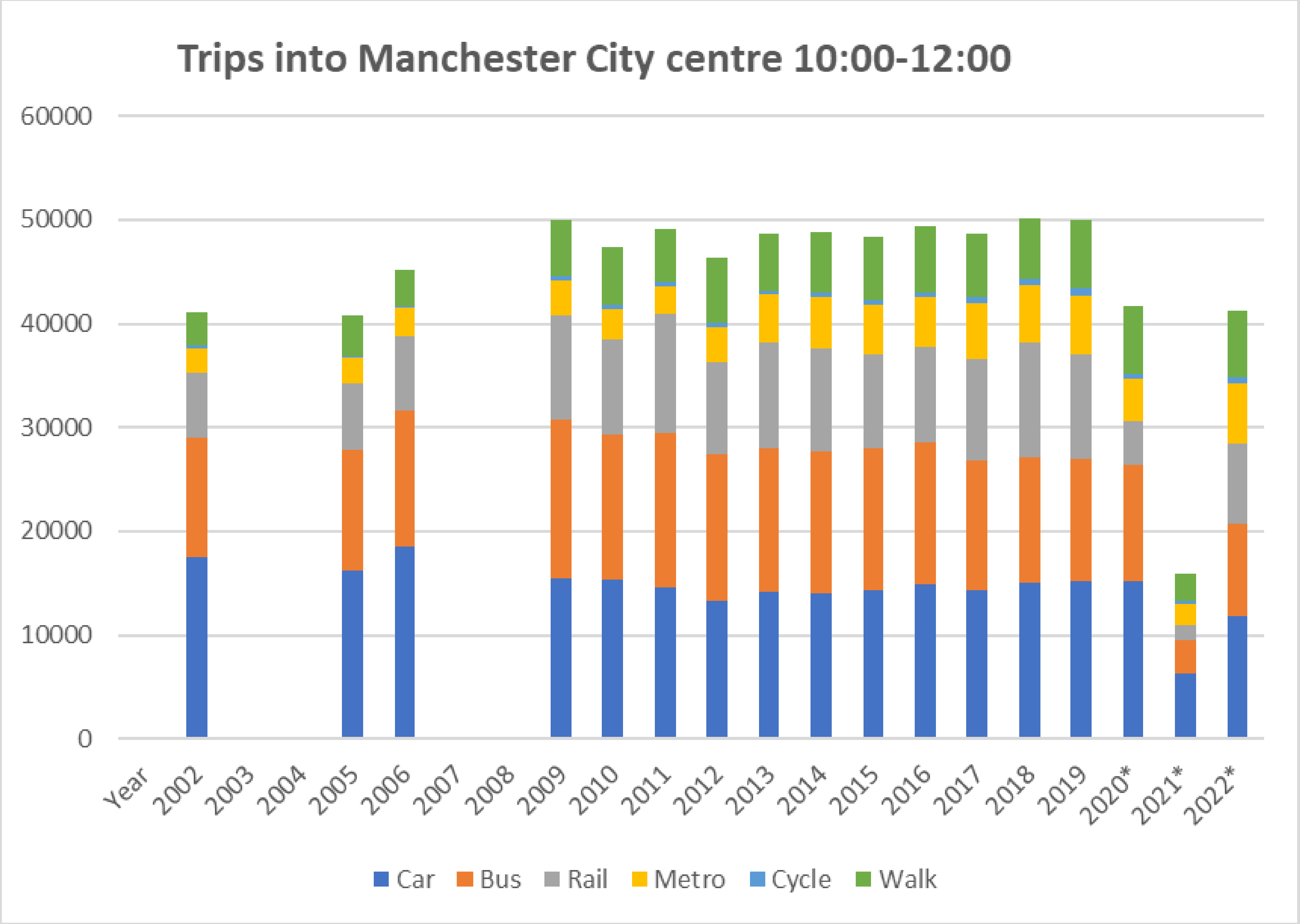


- National demand recovery was at 94%, but take out CrossRail and rail fares increases and it's a lot lower revenue recovery – of the order of 75% (so a 25% financial hole!)
- Massive drop in rail business market, and those that remain are more price savvy
- Demand recovery is higher than revenue, so we're getting less revenue per passenger
- Season ticket use has crashed. Anytime has lost business market, but backfilled by limited daily commuting

Source: Modern Railways/Roger Ford 24/08/23

Manchester City centre –modal split

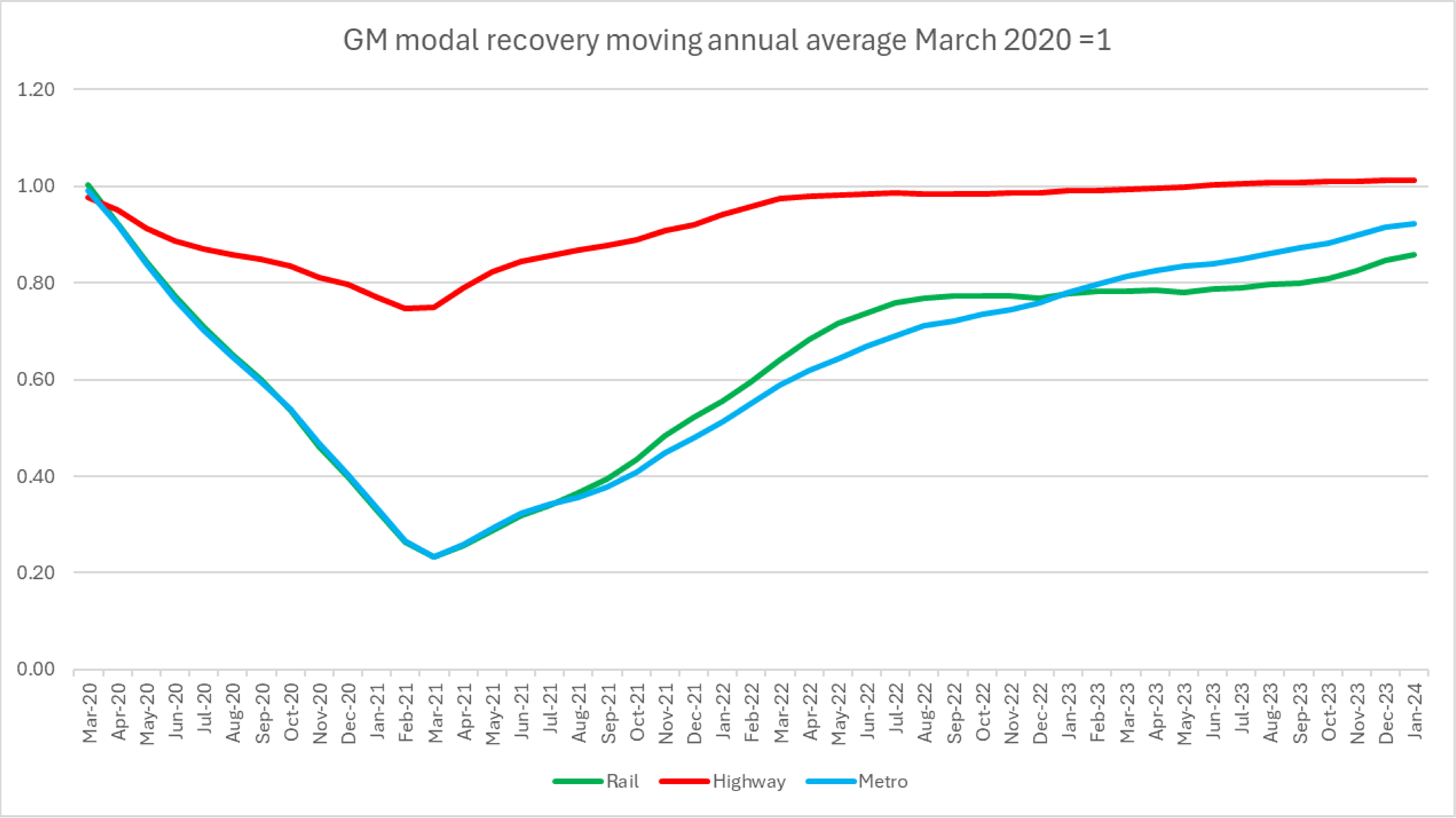




- In 2022 for GM as a whole rail's mode share of trips is very low (2% inc Metrolink)
- Into the city centre rail's share has fallen from a high of 26% in 2017 to 21% in 2022 for AM peak, whilst for off-peak it fell from 20% in 2019 to 19% in 2022 – again stronger offpeak bounce back

Source: TfGM Network Summary Reports

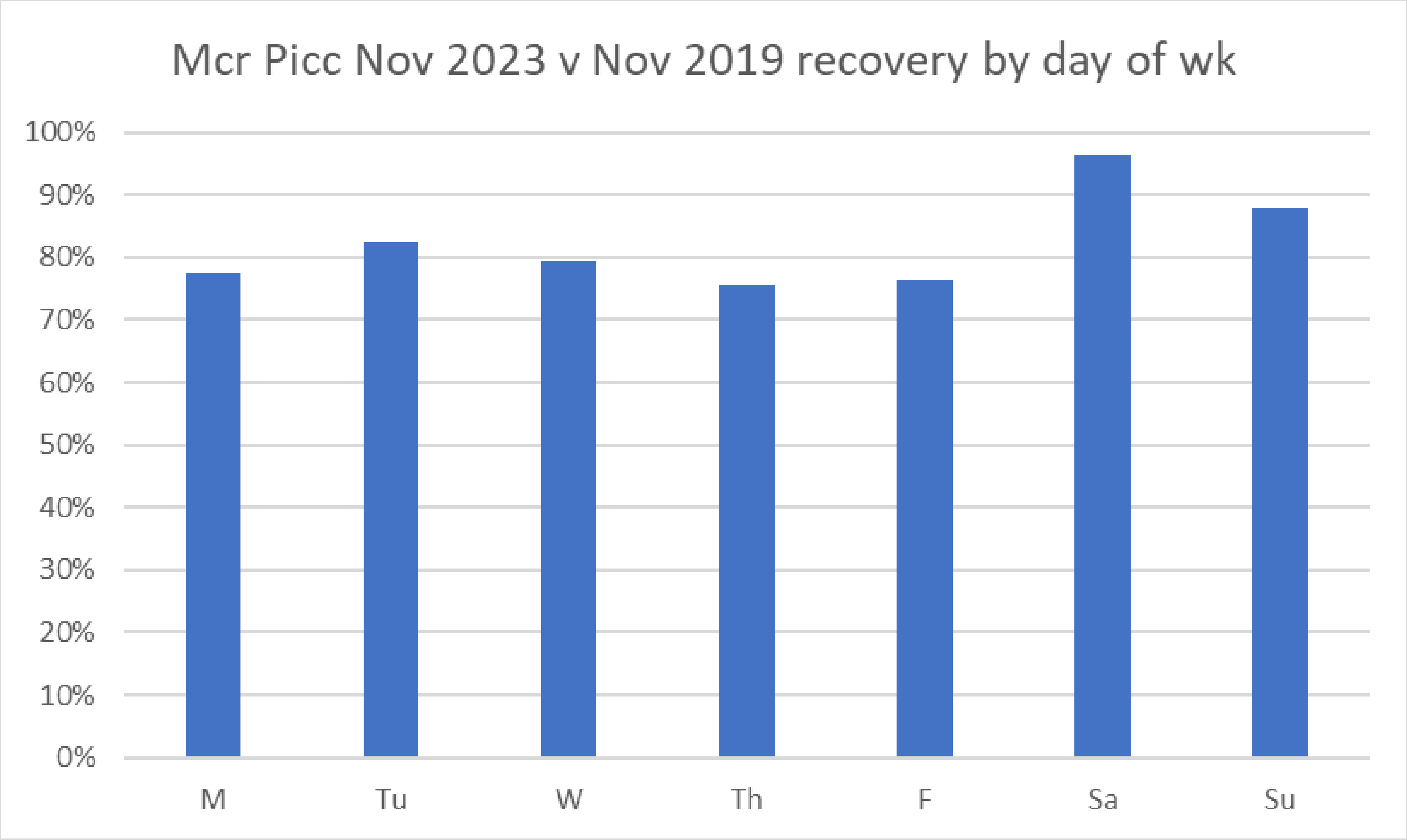
Recovery of modes in GM since Covid

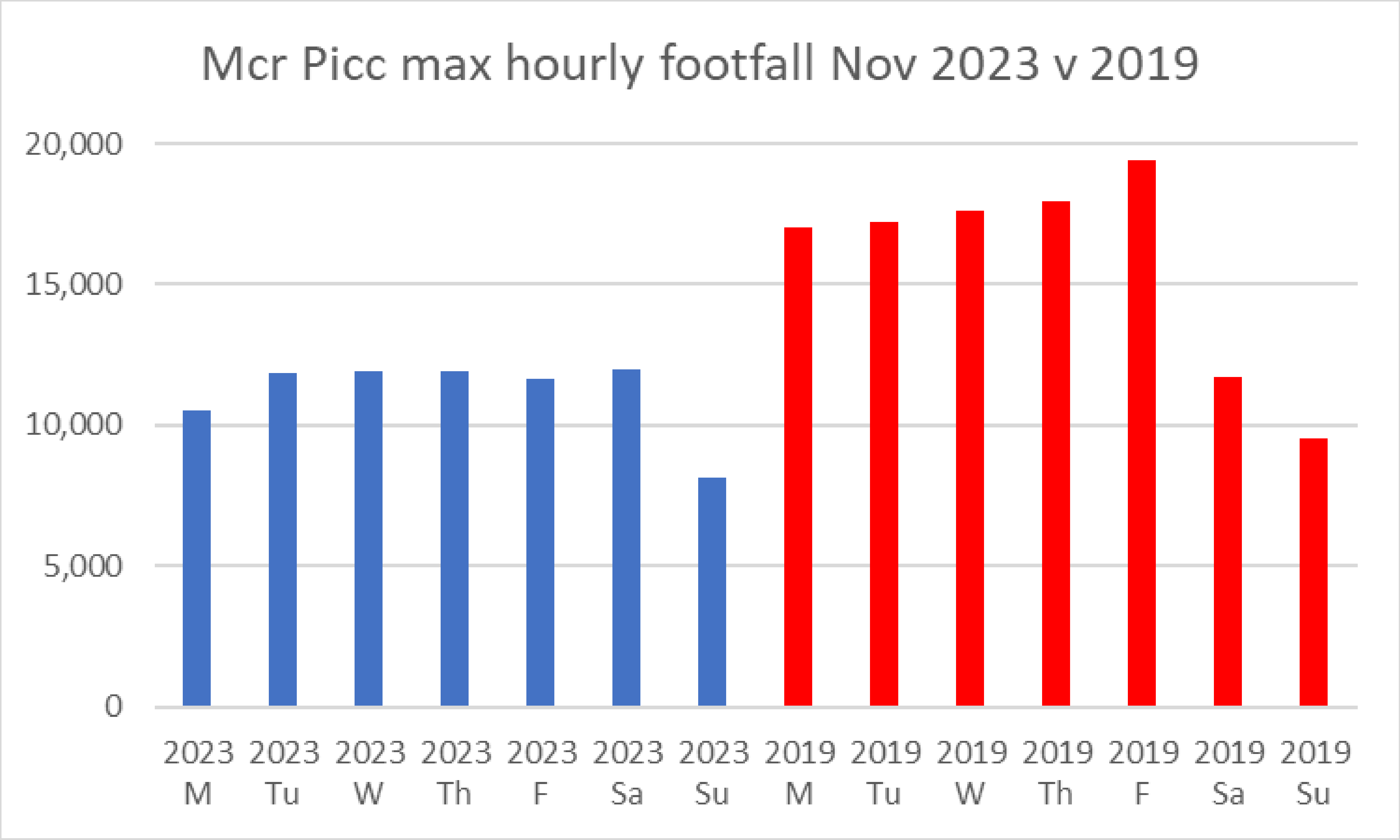


- Car back to pre Covid levels
- Rail now at 86 of pre Covid, Metrolink at 92%
- But a very different shape of demand!

Source: TfGM Network Summary Reports

Manchester Piccadilly – footfall profile

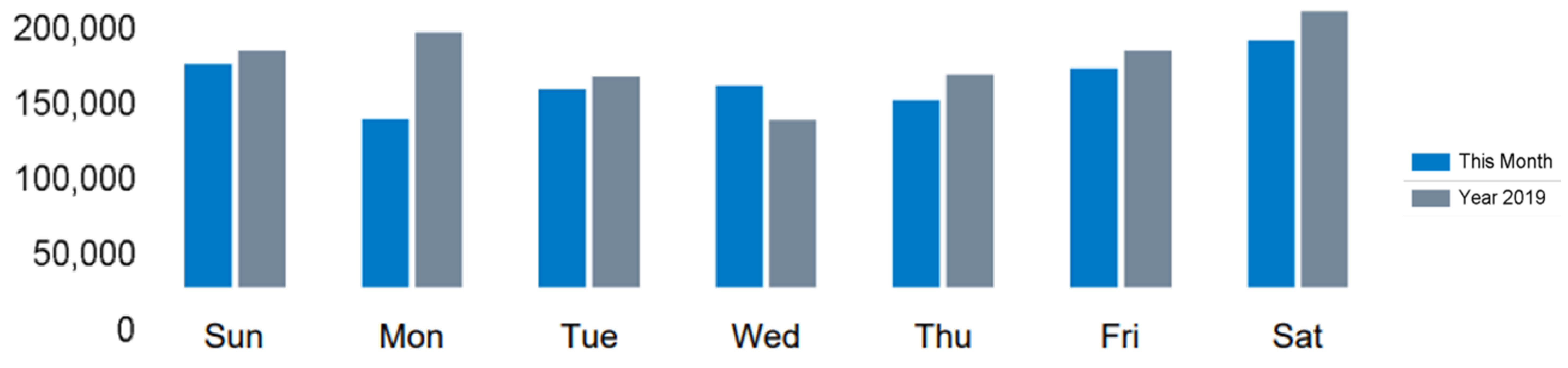


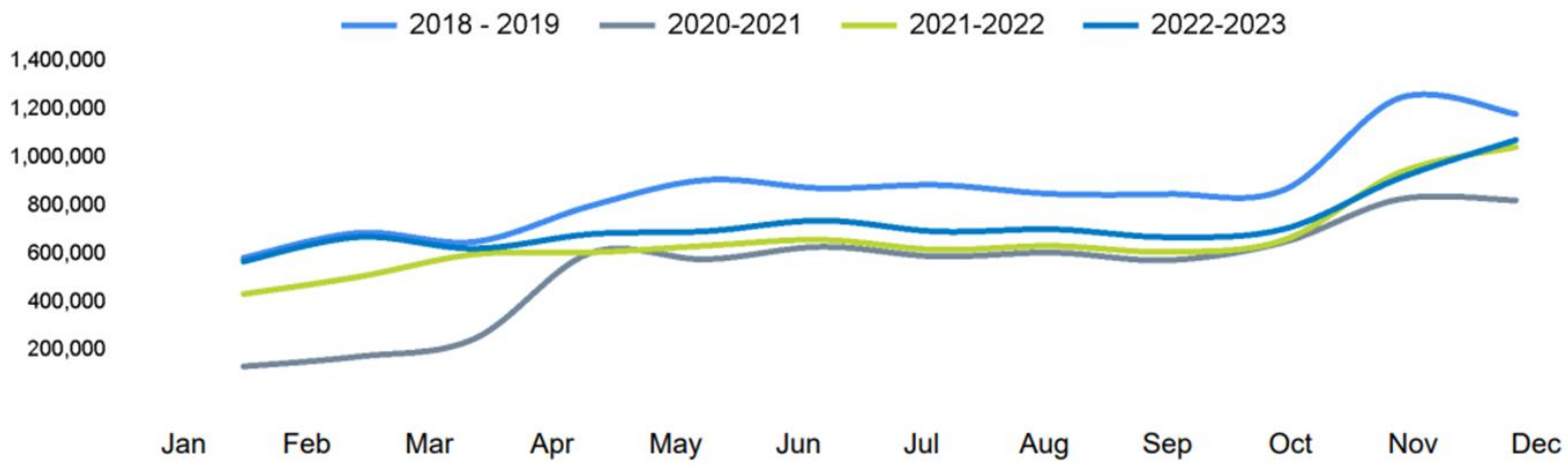


- Manchester (Piccadilly) back to about 80% of pre Covid footfall on weekdays, closer to 100% at weekends
- Weekday busiest hour demand has seen drop in volume by approx. 5,000!

Source: TfGM analysis of Network Rail footfall data

Manchester City centre footfall recovery





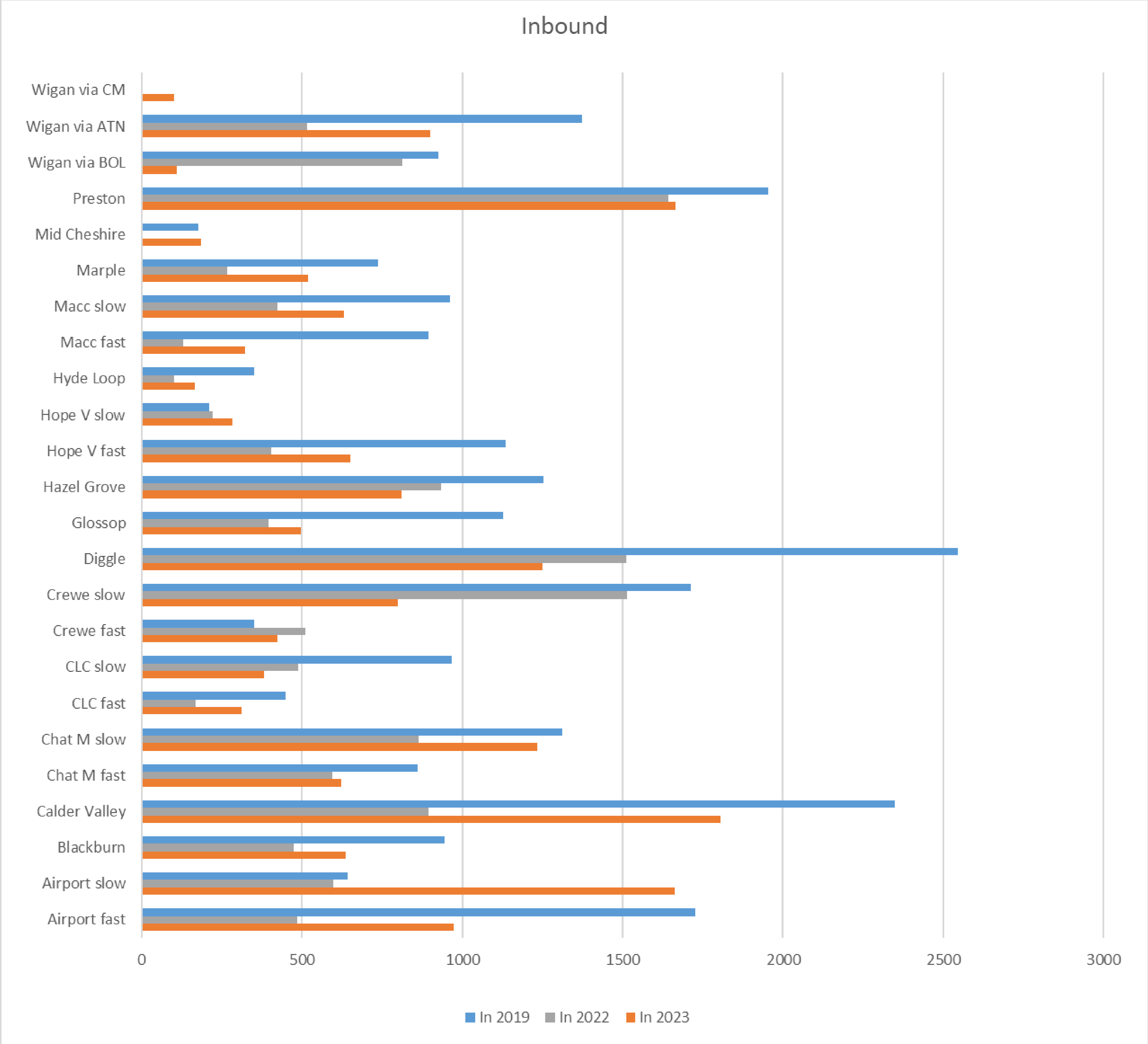
- Rail has mirrored Manchester city centre footfall recovery (and day of week variation)
- Cost of living pressure supressing city centre footfall recovery during 2023

Source; CityCo Manchester City Centre footfall 2023

GM rail route demand recovery/1

- We know how different service groups have recovered based on March video counts at city centre stations
- General rule = if service pre Covid was highly focussed on white collar commuting, it's come back poorly in peaks (e.g. Glossop, Hyde Loop but not helped by service reduction)
- If service has a mixed market and strong education flows it's come back well (e.g. Macc slow, Preston….)
- Evidence of swapping between slow and fast trains where fast reduced (e.g. Chat Moss, Macc,)
- Off peak and PM generally show better recovery than AM peak

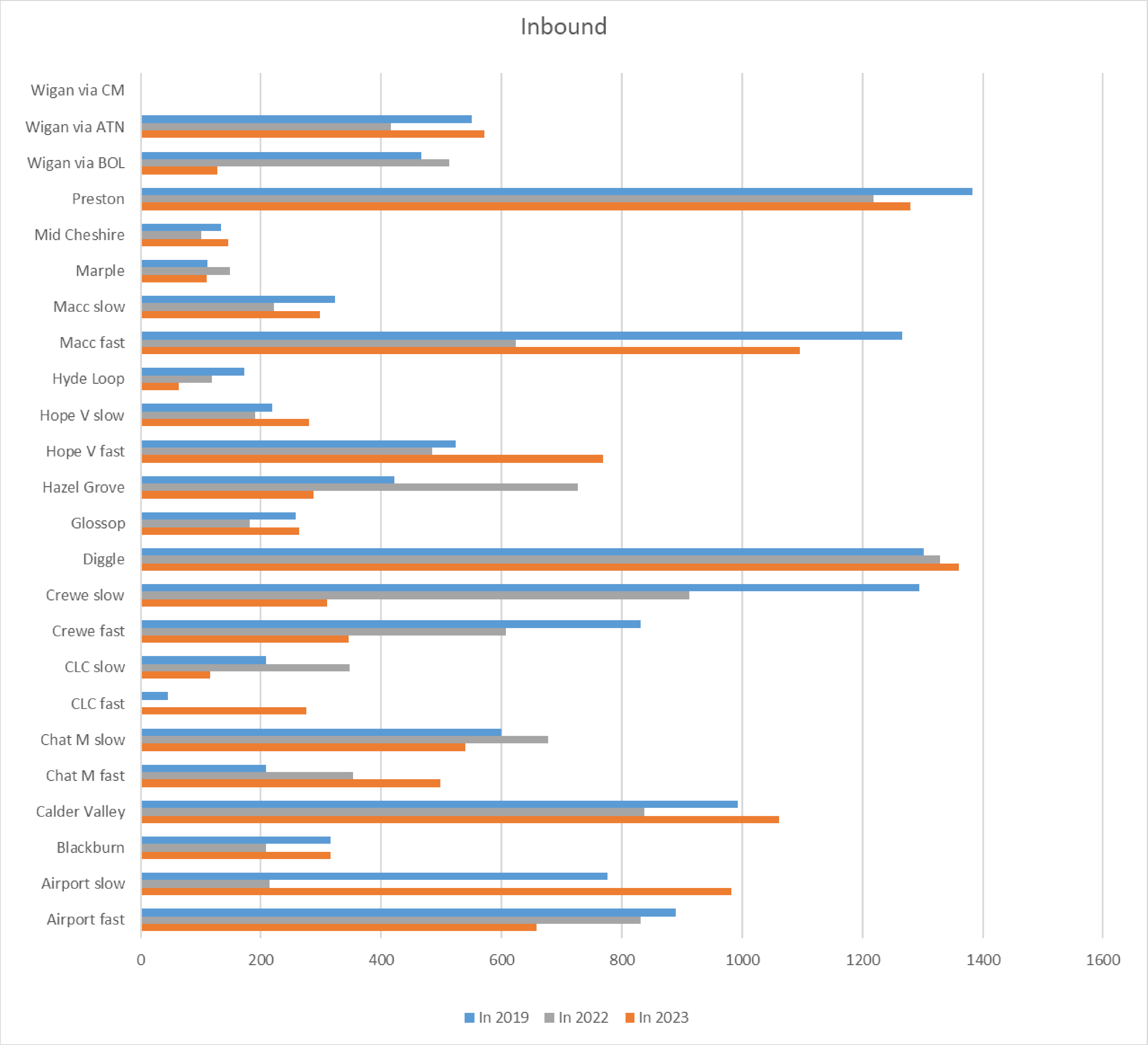
AM high peak arrivals 0800-0900



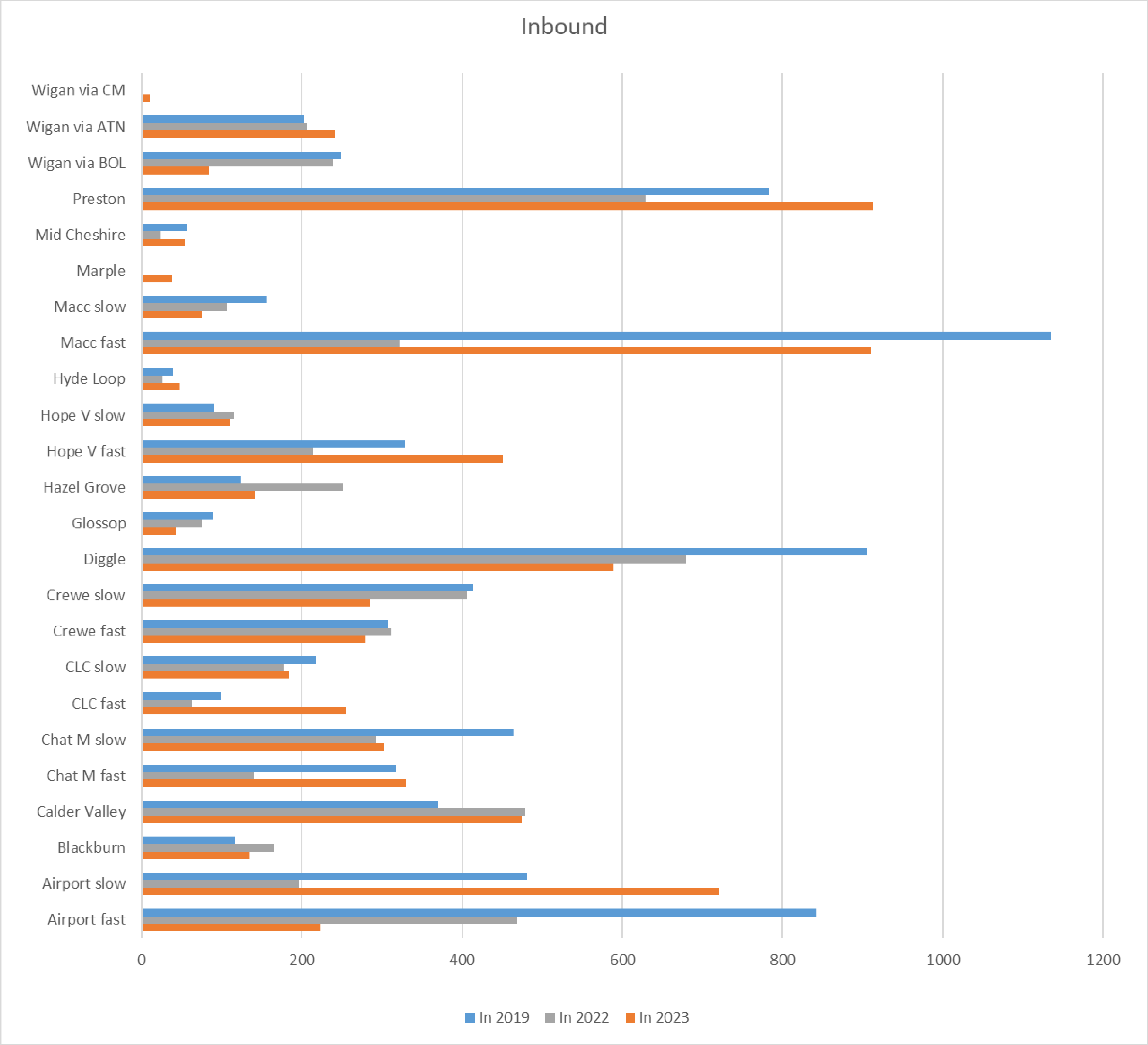
Source: TfGM March 2019, 2022, 2023 video counts at city centre stations

GM rail route demand recovery/2

AM off peak arrivals 1000-1200



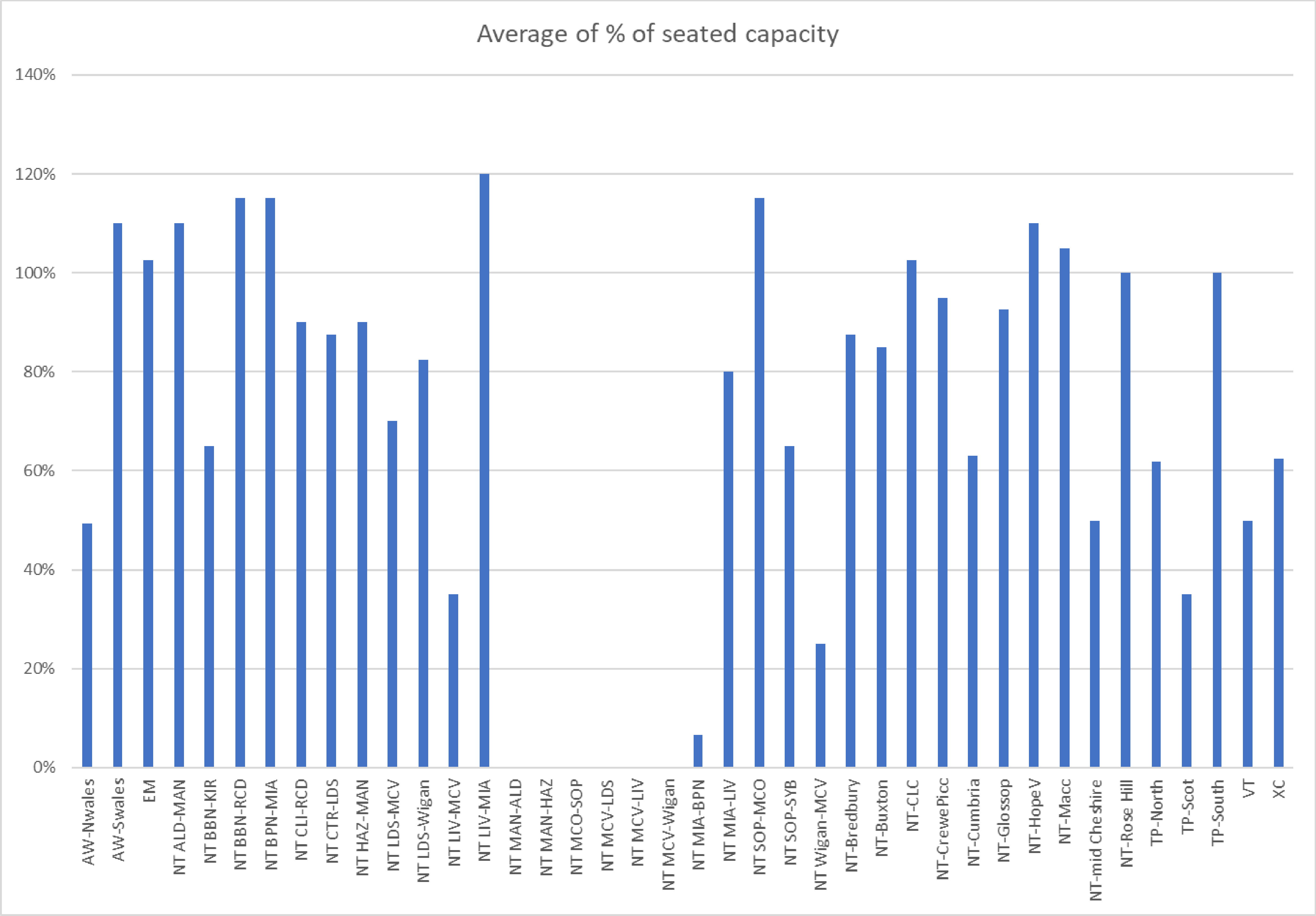
PM high peak departures 1700-1800



Source: TfGM March 2019, 2022, 2023 video counts at city centre stations

GM rail route demand recovery/3

AM peak arrivals 0800-0900



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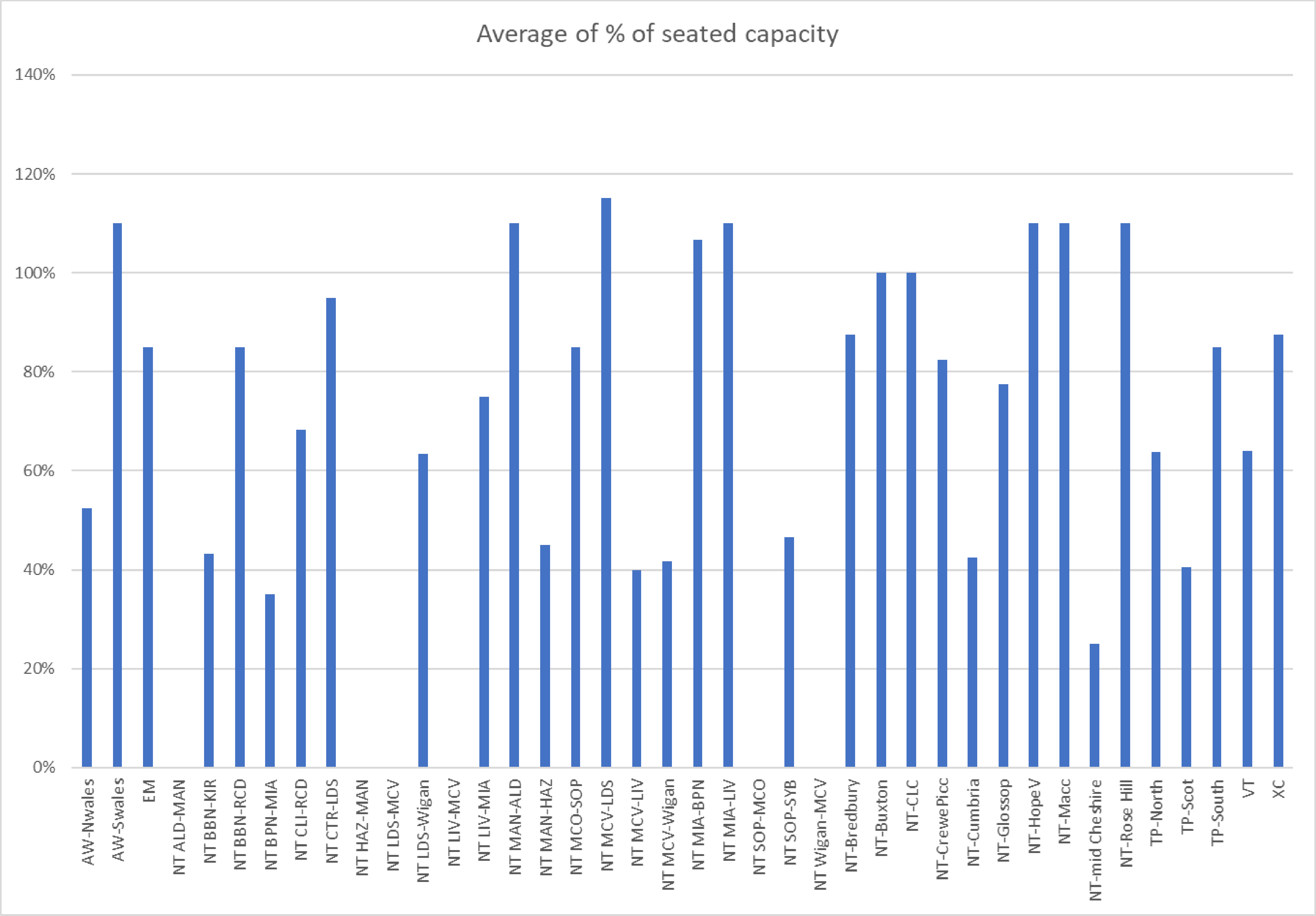
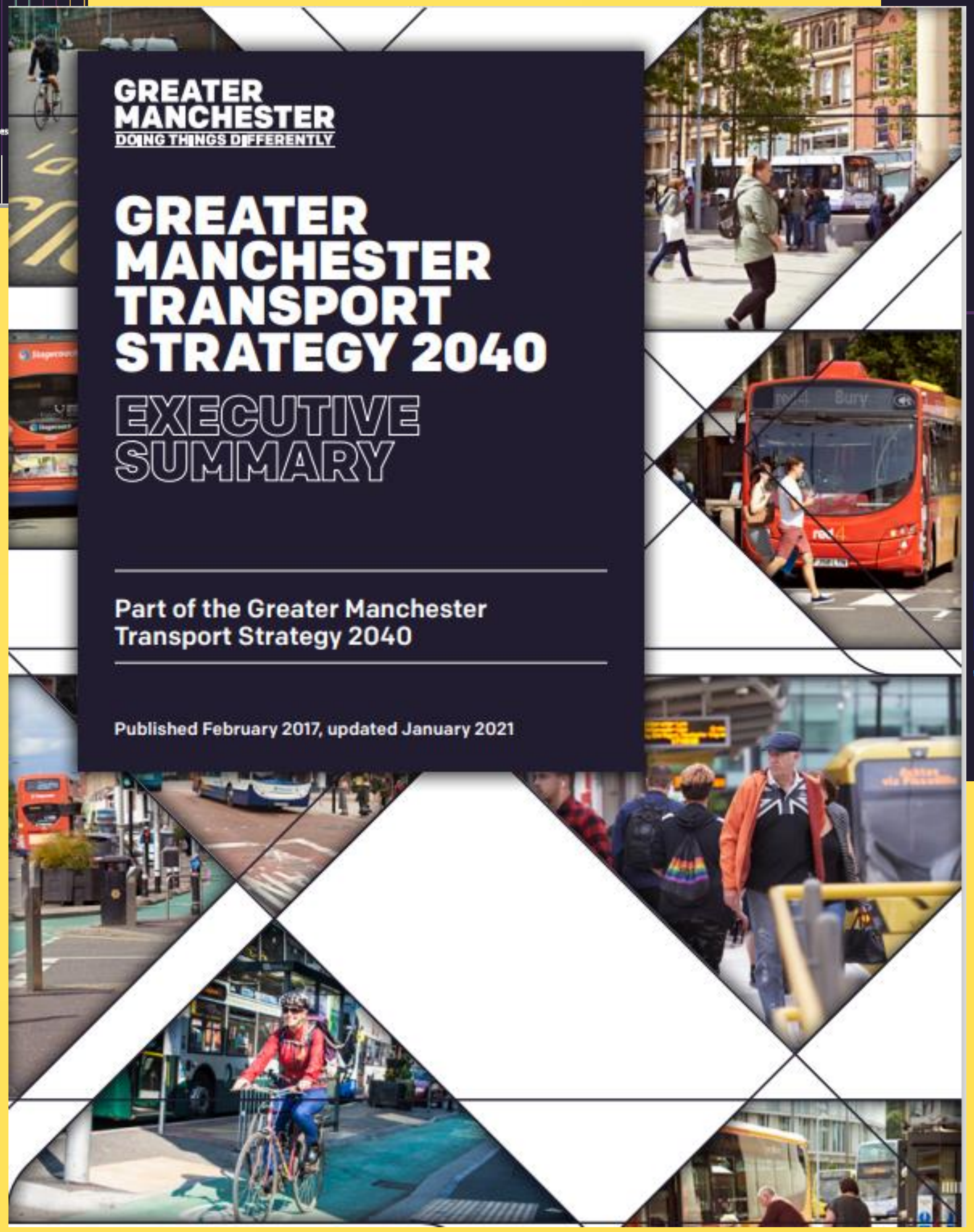
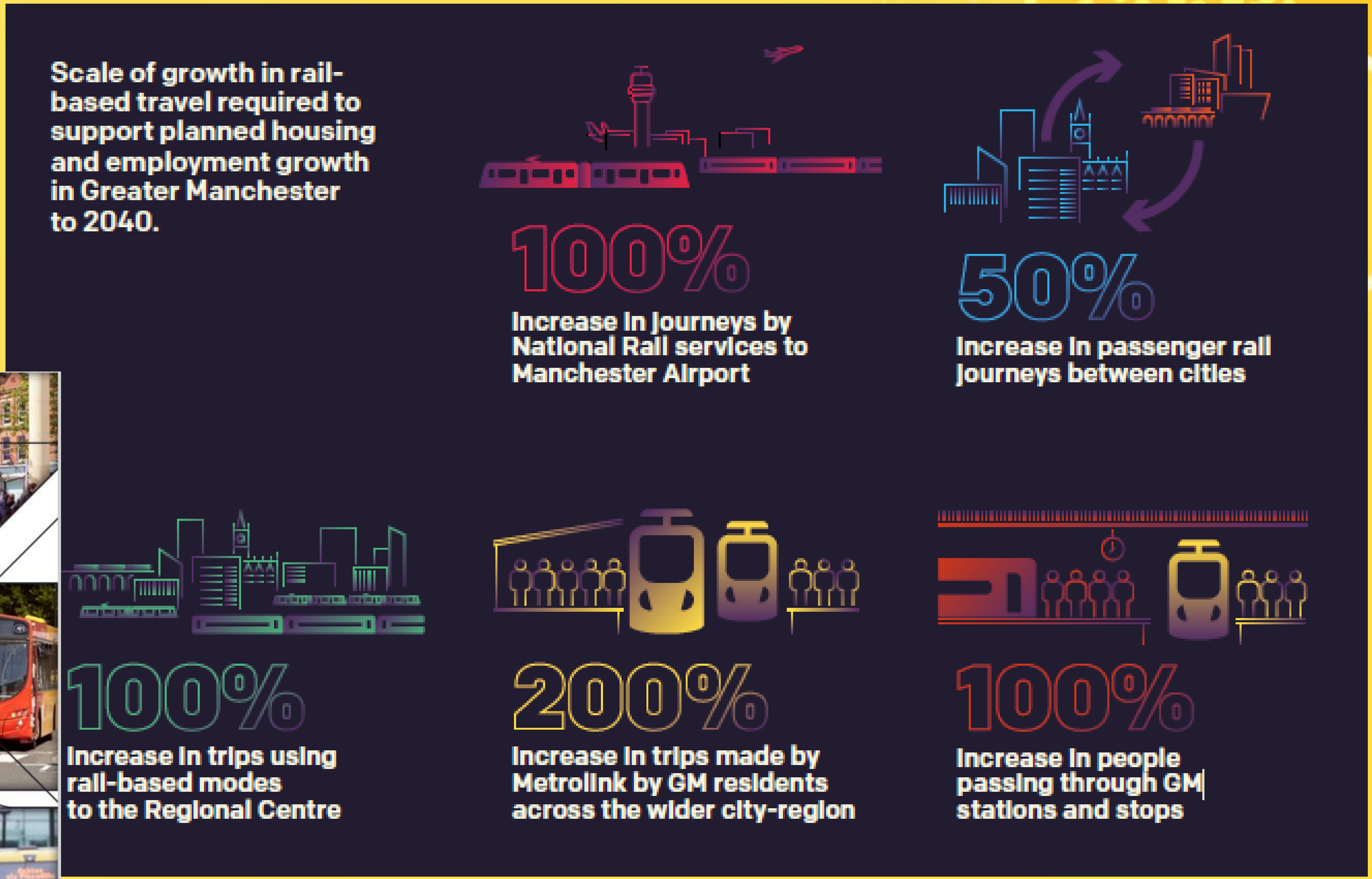


Source: TfGM autumn 2023 screenline counts

Source: TfGM March 2019, 2022, 2023 video counts at city centre stations

What's rail's future in GM?

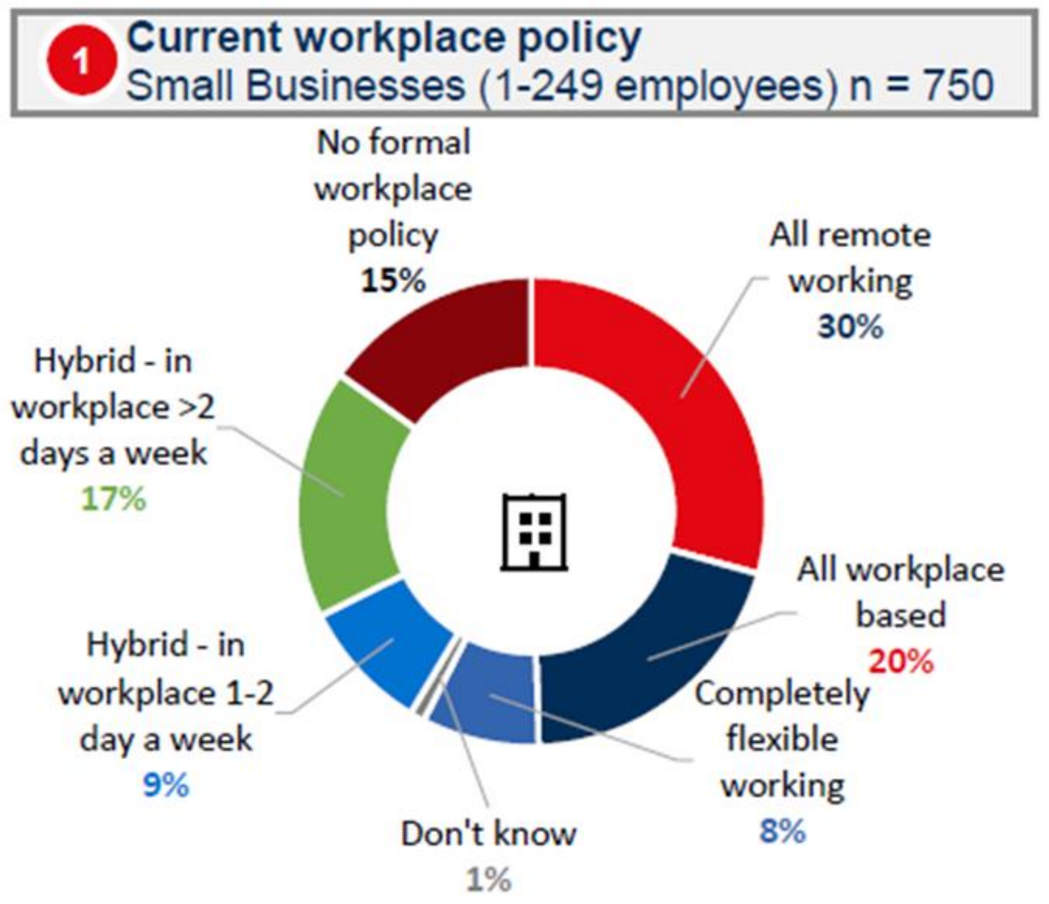


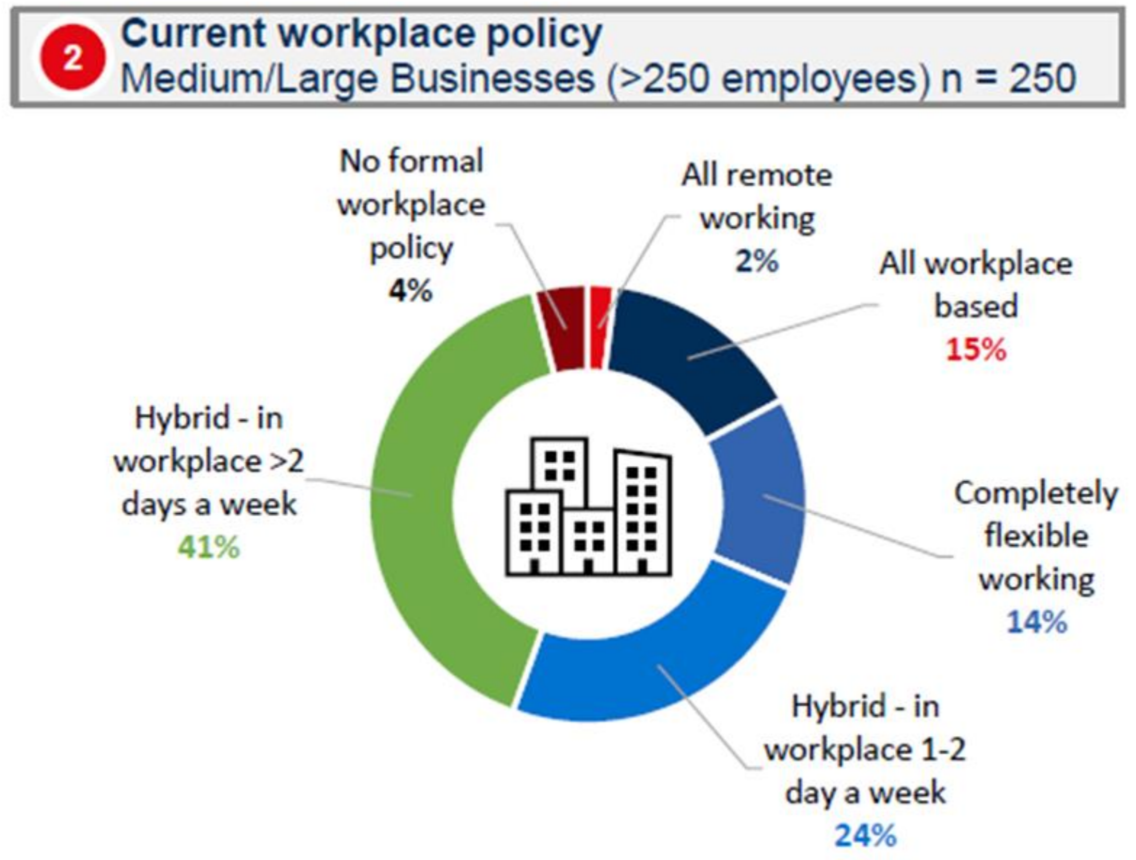


Things were already changing, now we're in the new world

BEFORE COVID

- Rail's growth was slowing from the double digit growth in 2000s
- Commuting was becoming more flexible
- Quality of rail's offer was declining (crowding, reliability, price)





AFTER COVID

- People now have the option to not travel at all – online shopping, Teams/Zoom
- Much more cost sensitive rail traveller, more willing to trade time of travel against choice
- More occasional market, willing to try rail but also willing to abandon rail if poor experience
- Business market has crashed

Source: GBRTT PRIMR report

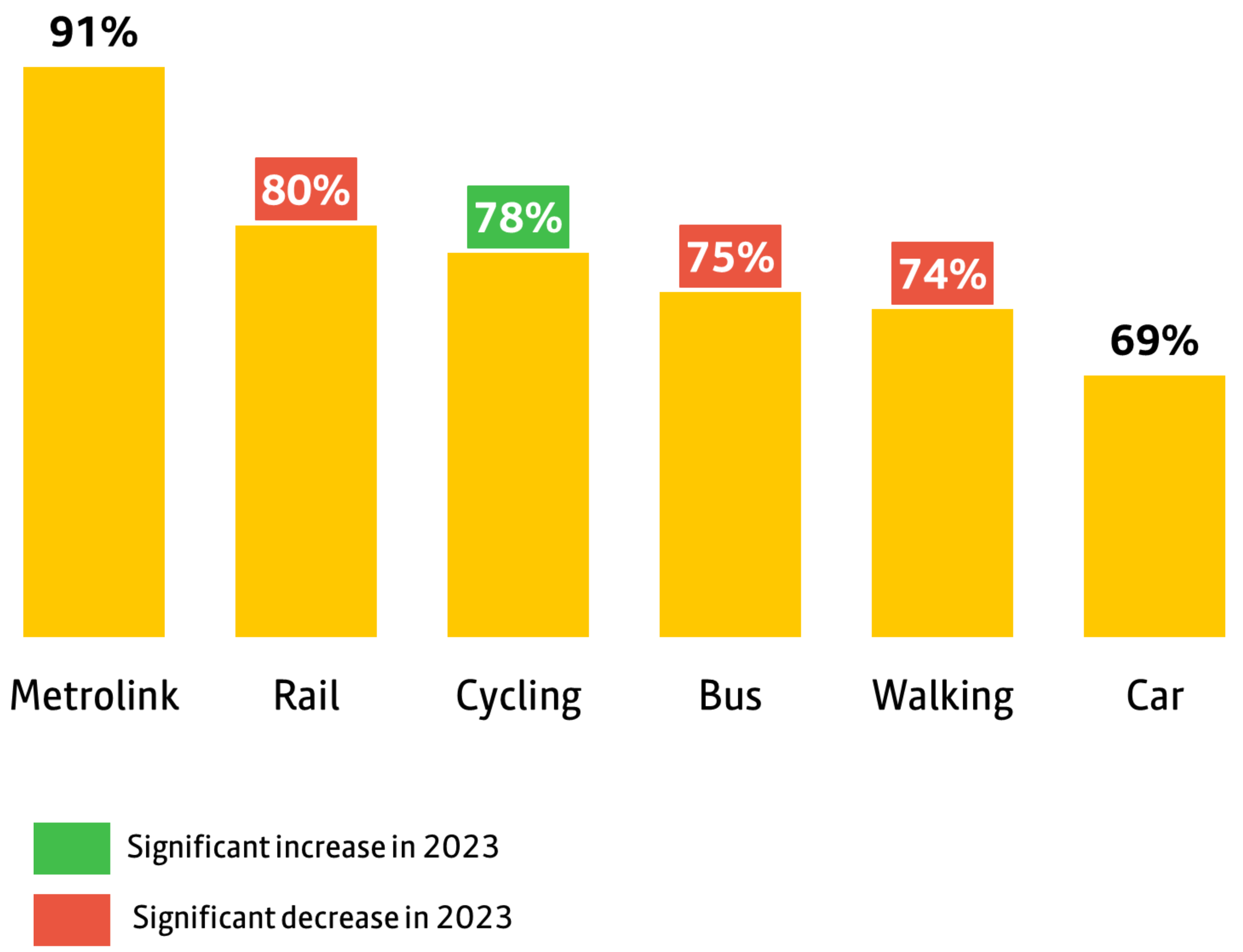
Much more fares sensitive market, mixing choices

- Rail seen as over-priced for all travel purposes, with largest resistance from business travellers (direct opposite to conventional wisdom)
- Season ticket has dropped out as a key product
- Putting fares up will lose passengers – and revenue!

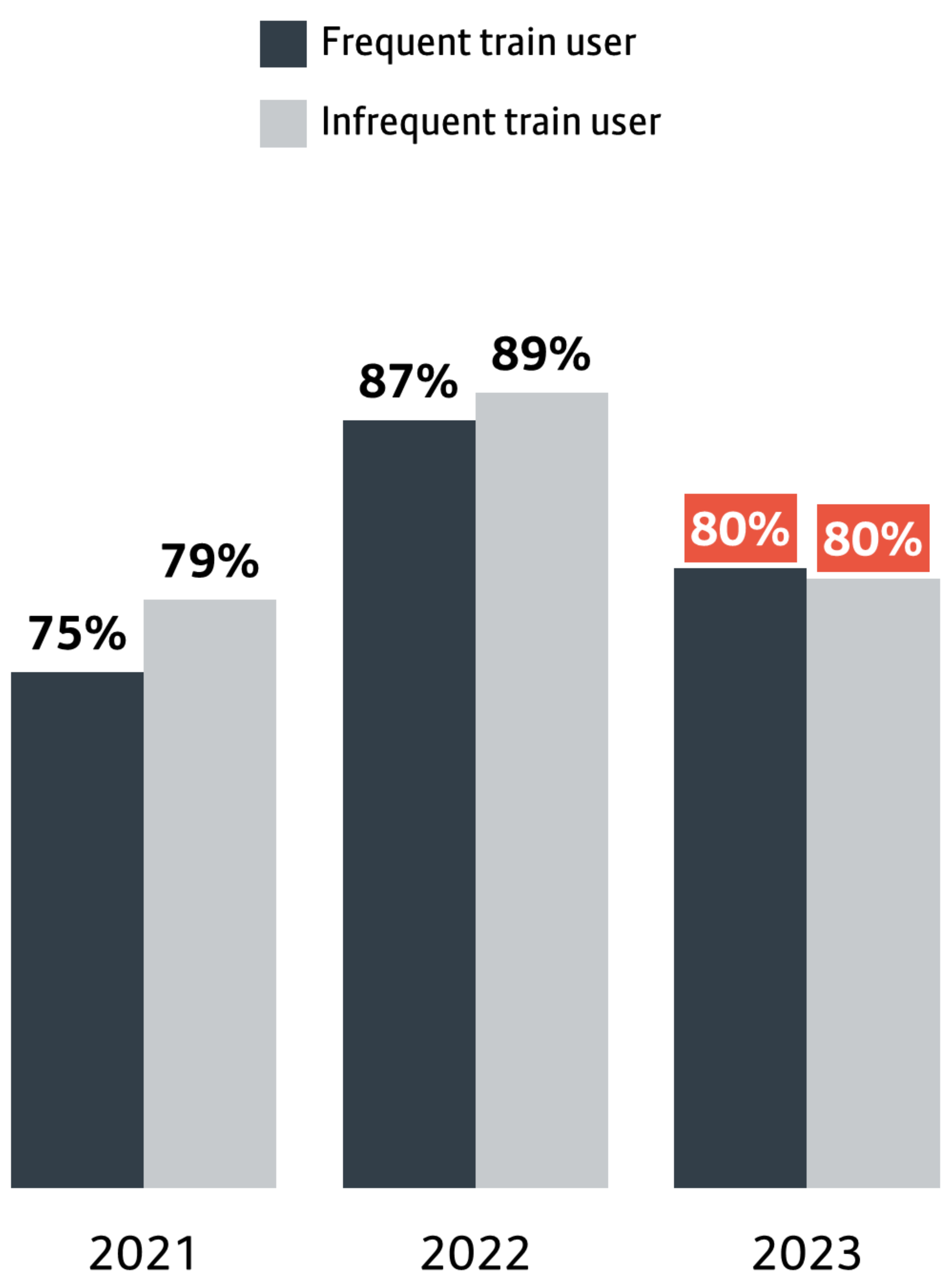
Source: TfGM/WYCA/TfN North of England Rail Fares Study, 2022

And what do GM travellers think of rail now/1?

Overall satisfaction with their usual journey by....

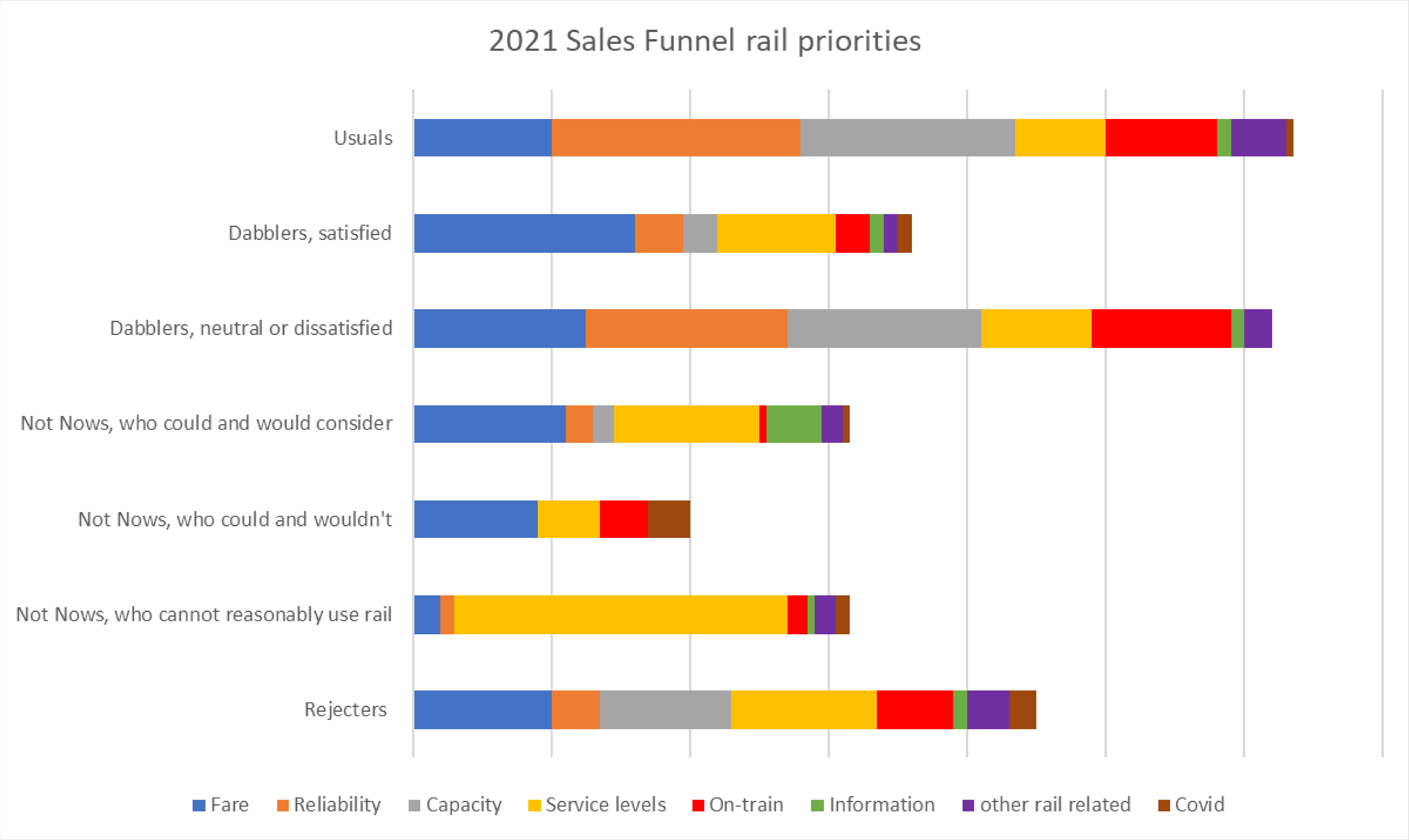


...by their frequency of use



- Rail seen as better than all other modes in GM bar Metrolink
- Rail's satisfaction has declined since 2022

What are all traveller's priorities for rail?



For users key issues are:

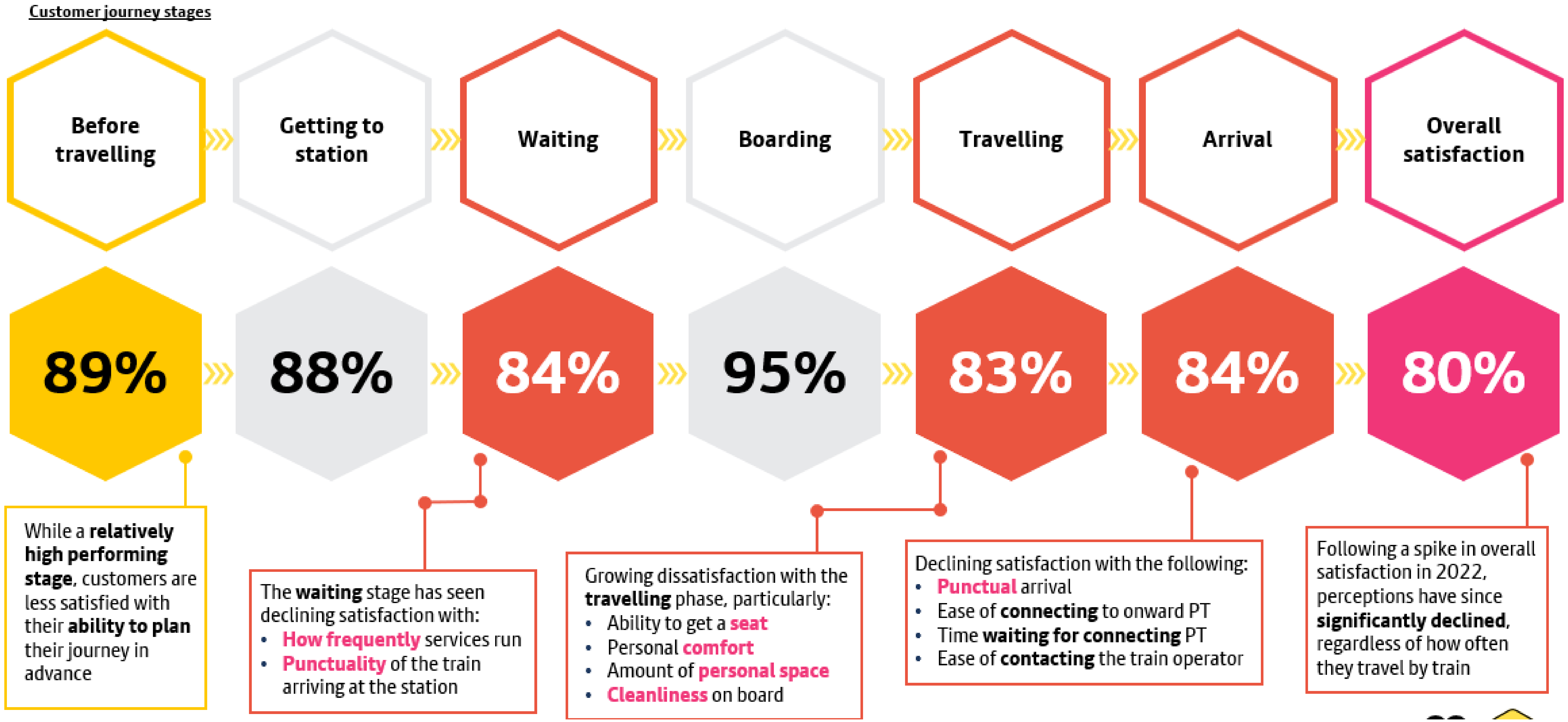
- Reliability
- Capacity
- Fares

For less frequent or non-users the biggest issues are:

- Fares
- Service levels

Source: TfGM Sales Funnel Research, 2021

And what do GM rail passengers think of rail?



- Weakest link of the rail journey is waiting, on-board and arrival – **frequency** & **punctuality**

Source: TfGM Network Principles Research, 2023

How do we rebuild rail in GM?

TfGM c[illegible]te slide

The stairway to heaven...for rail

First – listen to the people!

- Recognise that the rail market has changed
- Stabilise the rail offer – fix performance, flexibility of working
- Fix the network (build in extra-capacity)
- Run services when people want to travel, not when it's convenient for us to run trains
- Address the Fares challenge

Then………

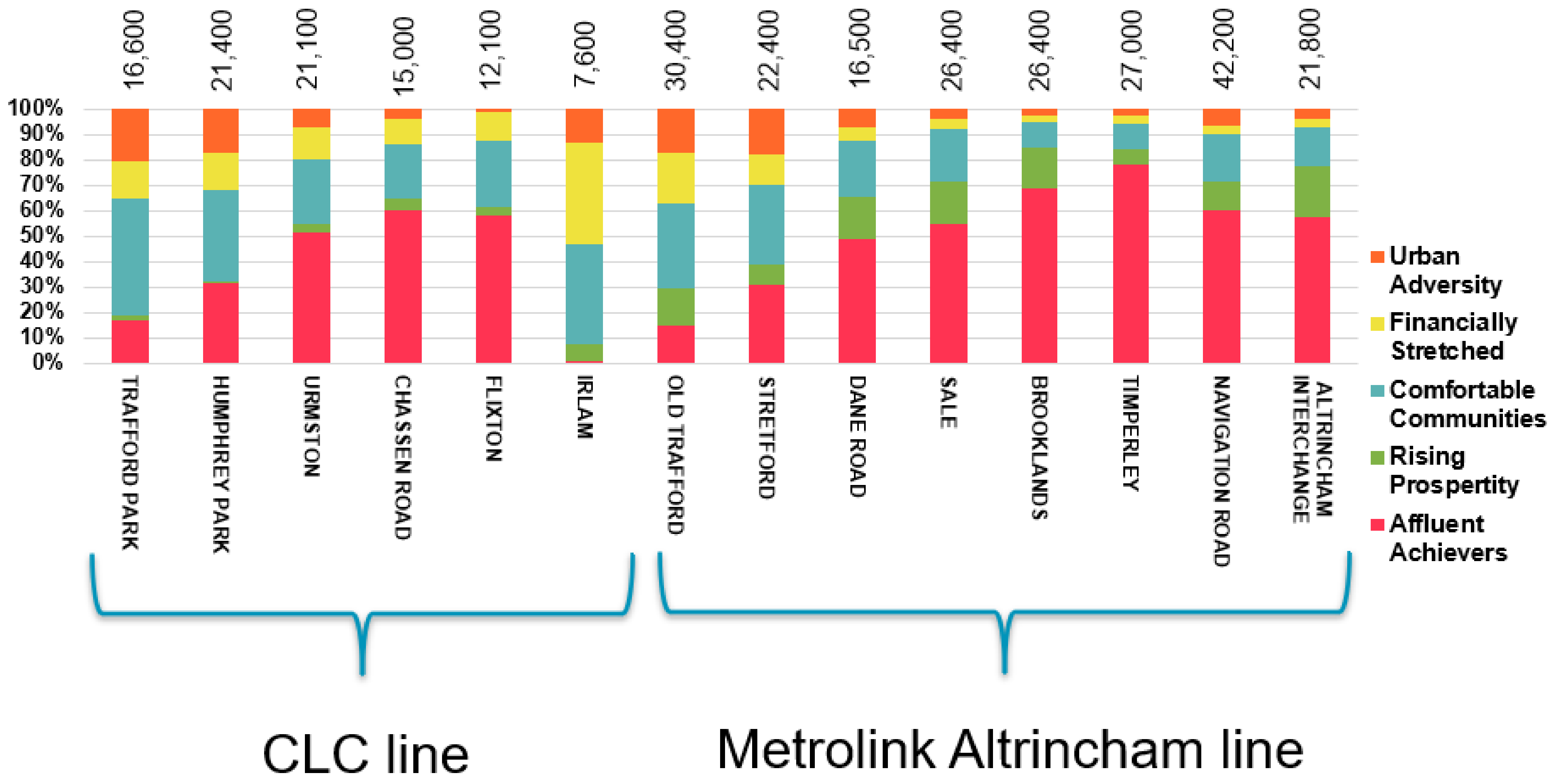
- Address the car becoming cheaper!

Key to all this – collect data

But most of all we need data!

- March 2024 video counts all day Thursday, Saturday, Sunday
- Aiming for March 2025 origin-destination surveys at city centre stations
- Network Rail funded online survey at Oxford Road in March 2024
- Working with DfT on new wave of National Rail Passenger Surveys
- Using EE/Network Rail Mobile Network data
- Understanding user and non-user barriers to using rail – Sales Funnel and Network Principles research
- Drawing upon MOSAIC/ACORN socio-economic data

Warrington Central Line socio-economic make-up



My moto - “No data, no story”

Source: TfGM analysis of ACORN data

And data can and does lead to change

What data has helped us to make the case for……

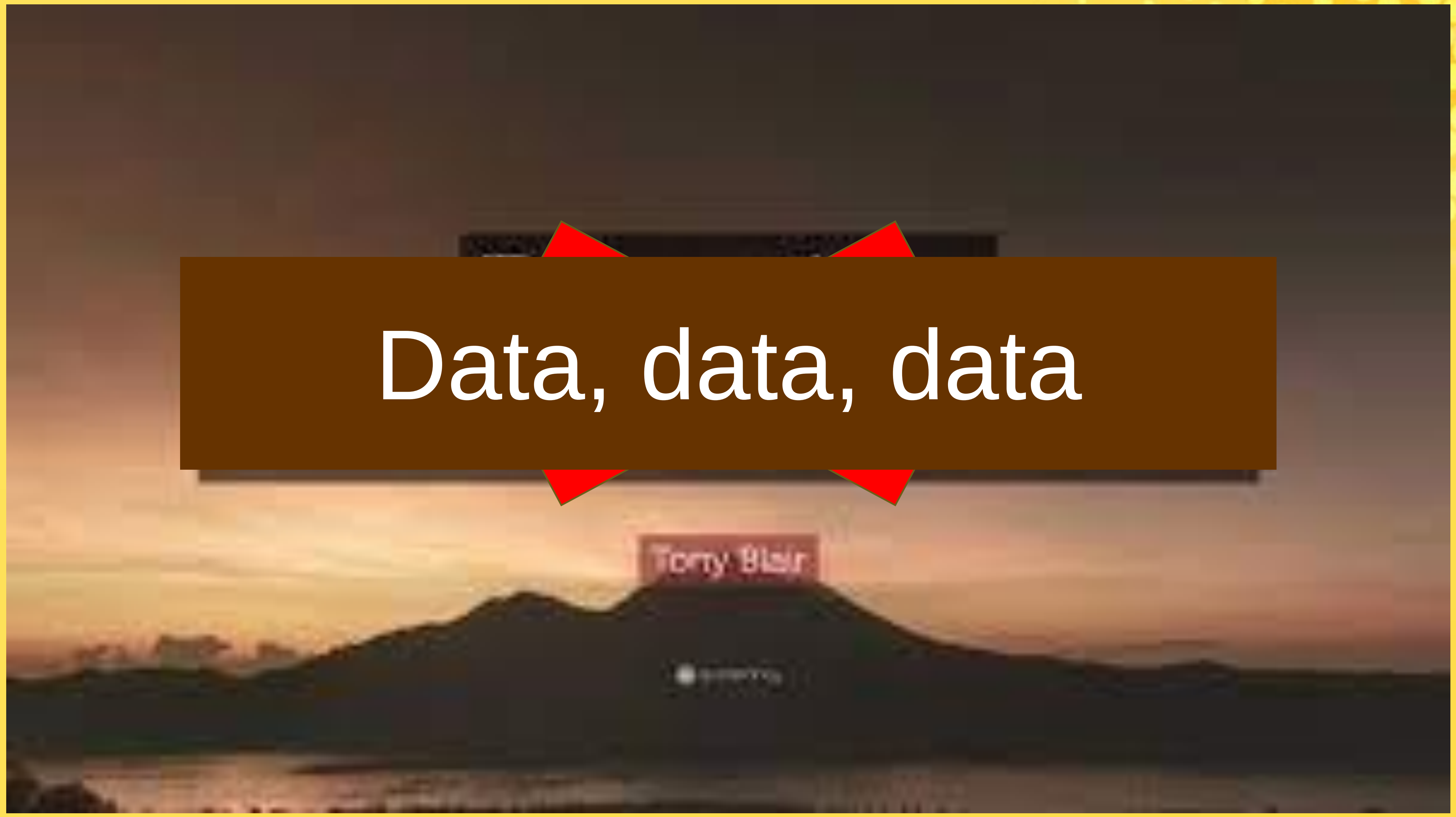
- ✓ Dec 2022 Sunday calls at Farnworth – first time for a long time
- ✓ Dec 2022 keeping Southport/Wigan link to south side of city
- ✓ Dec 2022 extra peak time calls at Horwich Parkway
- ✓ Avanti intermediate calls on Trent Valley
- ✓ Extra peak time trains at Greenfield and Mossley

What data is helping us to influence for the future:

- Enhanced service offering on mid Cheshire line
- Uplifted Sunday and evening service provision
- Summer 2026 timetable change
- Potential for fares changes trials
- Direct links to Manchester Airport
- Helping to drive future NT and TP service planning with Rail North Partnership

In summary

1. Rail is key to Manchester
2. But rail was not good even before Covid
3. Covid has changed the rail market – for ever
4. The new rail traveller is less frequent, more demanding and more cost conscious
5. Rail needs to evolve it's offer
6. Data is key!



Any questions?