Network Rail

‘REGIONAL URBAN MARKET STUDY DRAFT’

TravelWatch SouthWest

TravelWatch SouthWest was established in 2001 as The South West Public Transport Users' Forum (SWPTUF) to promote the interests of public transport users in the South West of England (comprising the counties of Devon, Dorset, Gloucestershire and Somerset and the unitary authorities of Bath and North East Somerset, Bournemouth, Bristol, Cornwall, North Somerset, Plymouth, Poole, South Gloucestershire, Swindon, Torbay and Wiltshire) - the Forum became a Community Interest Company, limited by guarantee, in August 2005. SWPTUF adopted the trading name of TravelWatch SouthWest in June 2006 and the Community Interest Company changed name to TravelWatch SouthWest CIC in November 2008.

Membership of the TravelWatch SouthWest CIC is open to every 'not-for-profit' organisation in the South West of England whose sole or principal purpose is to represent the users of any public transport service or to promote the development of public transport services - membership is also open to other 'not-for-profit' organisations' in the South West England who represent the interests of special and potential classes of public transport users e.g. the disabled or the elderly. TWSW currently has over one hundred affiliated organisations.

TWSW, which is a social enterprise company, acts as an advocate for passengers to lobby for the improvement of public transport in the region and works closely with local authorities, local enterprise partnerships, business organisations and other stakeholder groups - with the dissolution of the former Rail Passengers Committee for Western England in July 2005, TWSW is the representative body for public transport users throughout the South West of England.

Response to consultation

EXECUTIVE SUMMARY

This consultation is premature for the South West (SW). It shows what the Regional Urban level of service in West Yorkshire will be but says that elsewhere the same methodology will be applied **during the consultation.** The output from that process needs to be exposed to consultation input from stakeholders such as TravelWatch SouthWest (TWSW). There are insufficient 'Regional Urban' centres in the SW to cover all the relevant flows. Passenger growth in the SW is under estimated and forecasts of growth are only shown for Bristol whilst growth away from Bristol has been historically higher than Bristol.

The contribution of the SW economies to the national effort is considerable and all four sub economies at 5 below bear comparison with other parts of the country. They all need improved commuter services to allow them to maximise their contribution to the national economy. The Far SW and Greater Bristol economies take the two highest ranks in the economic growth table at 5.2 below. The high compound growth in rail passengers of over 6% (see 4 below) over the last 9 years in the SW will have been driven in part by this high economic growth. Rail capacity has not kept pace. It is essential that RUMS reflects this growth.

TWSW specifically request that

a. Tangible and quantified service level conditional outputs derived from applying the WY methodology in the SW during this consultation be formally consulted on before finalising the RUMS
b. The WY methodology is applied to at least the 9 centres in Table 2.1 plus Westbury, Cheltenham, Chippenham and Taunton.
c. To only show growth predications for Bristol is inadequate. Nine year compound growth at Cornish Mainline stations (7.0%), Devon Mainline stations (6.4%), Berks & Hants stations (6.3%) and Cheltenham line stations (7.4%) are greater than the Greater Bristol stations (6.0%). TWSW ask that growth forecasts for all the centres at(b) are published
d. The size, growth and productivity of the economies in the SW relative to other parts of the country are often underestimated. The conclusions at 5.4 below should frame the service level conditional outputs for RUMS in the SW.
e. The 'short' long distance output C services in the Long Distance Market Study (LDMS) within the SW cannot deliver the journey speed aspirations but must deliver the upper end of the range of the frequency aspiration and be integrated with RUMS services

MAIN REPORT

1. Need for and Support of the Long Term Planning Process (LTPP)

It is inevitable in responding to a consultation document that consultees will highlight areas where they disagree. TravelWatch SouthWest (TWSW) is no exception and thanks Network Rail (NR) for the opportunity given here to record some concerns about the Regional Urban Market Study (RUMS). We hope that there are also some constructive suggestions about interactions between RUMS and Long Distance Market Study (LDMS)

TWSW wish to be clear that they totally support the need for the LTPP and this Market Study along that path. Indeed in our response to ORR on NR's Strategic Business Plan (SBP) we noted a wider need for long term rail industry planning to incorporate rolling stock and HS2,

> ***"NR's Long Term Planning Process (LTPP) and Forward Vision for the nation's railway spreading the benefits of HS2 beyond London radial routes***

TWSW asks that ORR considers how NR's CP5 and future SBPs and LTPP can be combined with a transparent Long Term Passenger Rolling Stock Strategy (LTPRSS) and how the benefits of HS2 can be spread beyond radial routes from London."

TWSW reiterated this support in its response to the LDMS. However, TWSW feel that the consultation on the RUMS seems premature. The methodology has been applied to West Yorkshire (WY) and it will be applied elsewhere, but during this consultation. At page 8 we read, *"However, the* ***methodology*** *drawn from the analysis of West Yorkshire will be* ***applied to the other regional centres during the consultation period,*** *taking local factors into account before* ***being agreed with regional stakeholders and presented in the final Market Study"***

This draft should be more explicit about how the RUMS will be "***agreed with regional stakeholders and presented in the final Market Study".*** TWSW were not part of the regional groups used in the LDMS but are regional stakeholders. There should be another stage of formal consultation after the WY methodology has been applied to the SW to see tangible quantified 'conditional outputs' in terms of service levels for regional urban services, before they proceed into the Route Utilisation Studies (RUS)

2. Which large towns and Cities in the SW should have the WY methodology applied?

At page 40 we read, *"The table in* ***chapter 2*** *shows a list of the large towns and cities in the UK with rail based commuting demand and* ***articulates how*** *these places will be* ***considered during the consultation*** *period and reported in the final Regional Urban Market Study."*

TWSW cannot find the 'articulation' of "***how*** *these places will be* ***considered during the consultation period****".* The only table in Chapter 2 is Table 2.1 that names 9 such centres in the SW. The SW is a very large geographic area with very elongated rail geography in the Far SW. It is very different rail geography from West Yorkshire. TWSW doesn't believe that these 9 centres adequately cover the potential Regional Urban markets in the SW.

The potential list of candidates for these centres is shown in the Table below. Figure 2.1 doesn't give the status of the black dots on the map in that figure, but the centres concerned are shown in the Table below. Swindon was excluded from the LDMS and said to be in the London & SE Market Study (L&SEMS), so should it be excluded from RUMS? Swindon has a short distance 'commuting into' base as well as long distance commuters who travel to London, but does the absence of a green dot in Figure 2.1 mean that it is not part of RUMS? The map in the draft L&SEMS for consultation shows Swindon, Weymouth and Salisbury to be in the L&SE area. In LDMS centres with over 1.75m passengers were to be included to act as proxy for a wider geographic area. This should have therefore included Cheltenham and Chippenham but they didn't appear in the draft LDMS. They should be two of the large towns in RUMS.

Truro was included as a proxy for Cornwall in the draft LDMS. It is not clear whether RUMS intends to treat Penzance and Truro separately. Truro has 1.25m passengers as does Taunton; hence Taunton should also be evaluated in RUMS.

Table - Potential Candidates for large towns or cities in the SW for consideration in RUMS

Centre Name	Green Dot. On Fig 2.1	Black Dot On Fig 2.1	Table 2.1	Other/Notes
Bath	x		x	
Bristol	x		x	
Exeter		x	x	
Gloucester*		x	x	
Hereford		x	x	
Plymouth		x	x	
Swindon		x	x	No green dot? L&SE?
Truro			x	No black dot
Worcester		x	x	
Penzance		x		Truro Cornwall proxy in Table 2.1?
Weymouth		x		) Map in L&SEMS shows Weymouth
Salisbury		x		) and Salisbury in L&SE
Westbury		x		
Cheltenham*				) 1.75m+ in LDMS to
Chippenham				) cover wider catchment
Taunton				1.25m in LDMS same as Truro which is proxy

*Preference to consider Gloucester/Cheltenham as one sub regional economy for commuting

TWSW asks that all the above (with the possible exception of Swindon, Weymouth & Salisbury) be included or that NR explain why they are excluded from evaluation in RUMS

3. **Interaction with LDMS 'conditional outputs' within the SW**

The LDMS had 4 'conditional output' C flows within the SW. These are 'short' long distance (over 50 mile) flows within the region and the rail geography of these flows is primarily one elongated spine route. Conditional output C is 1 or 2 trains per hour (tph) at 80 mph end to end journey time. This would imply that the 180 miles between Truro and Bristol should have a journey time aspiration of 135 minutes. Current times would be nearer 210 minutes. This degree of reduction is infeasible but it is important that the upper end of the frequency range of 2 tph should be delivered to allow different calling patterns which can ensure that 1 tph can run fast between principle stations and 1 tph call at more stops.

Clearly how these C outputs are delivered in LDMS will interact not only with longer distance trains to London and Birmingham in LDMS but also trains delivering RUMS services. It should be an objective of RUMS to ensure that these 2 tph for LDMS between Truro and Bristol are timed to, between them, deliver repeating connections with branch line trains.

Long distance (>50 miles) flows within SW given 'conditional output' of C in LDMS

		MILES	Halfway Commute split
Truro	Plymouth	55	Bodmin
Truro	Exeter	105	----
Plymouth	Exeter	50	Totnes
Exeter	Bristol	75	Bridgwater

So, based on LDMS conditional output C flows, Penzance to Bristol could be split into 4 commuting zones centred on Truro, Plymouth, Exeter and Bristol.

Penzance/Truro/Bodmin
Bodmin/Plymouth/Totnes
Totnes/Exeter/Bridgwater
Bridgwater/Bristol/Bath/Gloucester-Cheltenham

At page 5 the Regional Urban Passenger Market is described as *"The Regional Urban market relates to an area less than 50 miles from a regional centre where people travel in large numbers primarily for the purpose of commuting and leisure***."** The distances from the commuting zones above to their centres are well within this 50 mile limit.

North and east of Gloucester/Cheltenham needs addressing and Hereford and Worcester are included in Table 2.1; the commuting centres/pattern across these four centres and their overlap with Bristol needs explanation in the final RUMS.

TWSW is aware that many of the LTAs in the SW have detailed plans of the 'metro' services that they wish to see in their areas which will improve the rail commuting offer for passengers and enhance their economies. TWSW asks that due weight be given to these plans.

4. Passenger Growth in SW

Fig 6.6 only shows Bristol growth forecasts in the SW. In 2023 Bristol growth is shown as +6%/+47% and 2043 +22%/111%

TWSW only has access to historic data in the form of Station Usage figures from ORR. A nine year spread of these are analysed at Annex A. Table 1 in that annex is usage at stations with over 100,000 Entries and Exits in 2009/10. It shows growth at those stations for 5 different periods. The longest period being 2002/03 to 2011/12 where growth up to 151% (Camborne) is recorded along with 7 other stations at 100%+.

Growth at an individual station for a selected time period can be misleading. Hence Table 2 then aggregates those stations into ten route section groups and calculates the annual compound growth over the longest (9 year) period possible from this data. Devon & Cornwall branch lines show 8% pa compound.

Whilst branch line growth has been good in % terms the bulk of the volume of growth is on the mainline. These flows are relevant to RUMS and the 'short' long distance flows at 3 above.

Historic compound growth at Cornish Mainline stations (7.0%), Devon Mainline stations (6.4%), Berks & Hants stations (6.3%) and Cheltenham line stations (7.4%) are greater than the Greater Bristol stations (6.0%). TWSW ask that growth forecasts for all 16 centres at Table in 2 above (possibly excluding Swindon, Weymouth and Salisbury if these are in L&SEMS) are published.

5. Economic Growth

Annex B compares four sub-economies in the SW (Swindon & Wiltshire, Gloucestershire, Greater Bristol and the Far SW) and offers comparison with South Wales plus five midlands and northern economies.

5.1 Comparative size of economies in Annex B

The economies in Annex B in ranked order

	GVA £bn
Greater Manchester	48.20
Derbyshire & Notts (including Derby & Nottingham)	37.08
Far SW	35.81
Greater Bristol	26.04
Merseyside	23.06
South Wales	22.67
Leeds	18.00
Swindon & Wiltshire	14.16
Gloucestershire	12.11
Sheffield	10.00

a. All of the four SW sub economies above are greater than Sheffield
b. The Far SW & Greater Bristol are as (a) above and also greater than the economies of Merseyside, South Wales and Leeds (Leeds is in the WY study)
c. The Far SW economy exceeds Greater Bristol by 73% and is over 95% of the economy of Derbyshire & Nottinghamshire
d. Greater Bristol is over half (54%) of the Greater Manchester economy, the Far SW is 75% the size of the economy of Greater Manchester.

5.2 Comparative economic growth

Growth (%) from 1999 to 2011 from Annex B in ranked order

Far SW	69.3
Greater Bristol	68.1
South Wales	57.0
Sheffield	56.5
Swindon & Wiltshire	55.3
Derbyshire & Notts (including Derby & Nottingham)	52.6
Gloucestershire	50.8
Greater Manchester	50.1
Leeds	48.8
Merseyside	48.4

a. The two fastest growing economies in Annex B are the Far SW & Greater Bristol
b. All four SW sub economies grew by over 50%

5.3 Comparative productivity of economies in Annex B

Measuring productivity as GVA (£) per head and ranking them produces

Greater Bristol	24,345
Leeds	23,953
Swindon & Wiltshire	20,824
Gloucestershire	20,284
South Wales	18,468
Sheffield	18,115
Greater Manchester	17,970
Derbyshire & Notts (including Derby & Nottingham)	17,571
Merseyside	16,698
Far SW	16,307

a. The productivity of a local economy will be helped by allowing it to access a wider labour market via improved rail commuting opportunities defined in RUMS.
b. Greater Bristol is on a par with Leeds for economic productivity. To maintain this status it will need the same level of improvement to RUMS services as Leeds which is in the WY study.
c. The Far SW has the lowest productivity and has very limited access by rail to wider labour markets. RUMS needs to maximise improvements that will help improve productivity in the Far SW by making employment in the centres more accessible to the wider labour market.

5.4 Conclusions

The contribution of the SW economies to the national effort is considerable and all four sub economies here bear comparison with other parts of the country. They all need improved commuter services to allow them to maximise their contribution to the national economy. The Greater Bristol economy is larger than the Leeds economy and on a par with Leeds for economic productivity. To maintain this status it will need the same level of improvement to RUMS services as Leeds which is in the WY study.

The Far SW is the largest of the SW economies but is dispersed along the Far SW Spine. This spine is served by one mainline with RUMS centres along it. The pattern of RUMS development here will be different from that in West Yorkshire.

The Far SW and Greater Bristol economies take the two highest ranks in the economic growth table at 5.b above. The high recent compound growth in rail passengers of over 6% (see 4 above) in the SW will have been driven in part by this high economic growth. Rail capacity has not kept pace. It is essential that RUMS reflects this growth.

Annex A – Passenger growth in the Southwest
Table One - Station Usage in SW (east to west order) - ORR data
Figures are in **THOUSANDS** with stations fewer than 100,000 in 2009/10 ignored.

						GROWTH %				
Station	**02/03**	**08/09**	**09/10**	**10/11**	**11/12**	**11/12 10/11**	**10/11 09/10**	**09/10 02/03**	**10/11 02/03**	**11/12 02/03**
Swindon	2117	2905	2835	3039	3235	6	7	34	44	53
Kemble	195	310	317	341	357	5	8	63	75	83
Stroud	222	400	414	448	464	4	8	96	102	109
Stonehouse	66	109	111	129	137	6	16	68	95	108
Gloucester	748	1159	1145	1217	1247	2	11	53	63	67
Cheltenham	881	1529	1599	1727	1813	5	8	81	96	106
Chippenham	1151	1561	1517	1654	1751	6	9	32	44	52
Bath	3333	4758	4779	5218	5676	9	9	43	57	70
Bristol Pwy	1293	2084	2042	2115	2254	7	4	58	64	74
Bristol TM	5178	7830	7876	8409	8875	6	7	52	62	71
Weston-s-m	717	964	936	1038	1104	6	11	31	45	54
Pewsey	123	179	182	203	208	2	12	48	65	69
Westbury	271	369	378	425	453	7	12	39	57	67
Frome	80	112	121	135	146	8	12	51	69	83
Castle Cary	152	232	235	259	275	6	10	55	70	81
Taunton	768	1185	1192	1238	1293	4	4	55	61	68
Tiverton	185	344	355	367	392	7	3	92	98	119
Exeter St D	1530	2129	2153	2266	2394	6	5	41	48	56
Teignmouth	287	438	451	505	567	12	12	57	76	98
Newton Abb	635	929	941	1022	1088	6	9	48	61	71
Torquay	325	371	360	381	408	7	6	11	17	26
Paignton	336	460	472	507	555	9	7	40	51	65
Totnes	316	541	564	593	640	8	5	78	88	103
Plymouth	1432	2250	2277	2402	2597	8	5	59	68	81
Liskeard	210	295	289	309	345	12	7	38	47	64
Bodmin	144	225	222	236	248	5	6	54	64	72
Par	78	163	163	179	186	4	10	109	129	138
St Austell	266	389	395	436	467	7	10	48	64	76
Truro	638	997	1042	1161	1278	10	11	63	82	100
Redruth	187	293	284	308	335	9	8	52	65	79
Camborne	110	216	225	247	276	12	10	105	124	151
Penzance	392	526	521	557	580	4	7	33	42	48

TABLE TWO – Passenger Growth in sections of 'Route Groups' of stations within the SW

GROUP	PASSENGERS '000 PER ANNUM Earliest	Late-1	Latest	GROWTH % COMPOUND PER ANNUM Earliest/Latest	GROWTH % LATEST YEAR Latest/Late-1	Year Set	Stations or Branches
Cornwall Mainline	2025	3433	3715	7.0	8.2	1	A
D&C CR Branches	894	1689	1937	8.0	14.7	2	B
Exmouth	791	1157	1278	4.9	10.5	2	C
Paignton & Torquay	661	888	963	4.3	8.4	1	D
Devon Mainline	4385	7155	7678	6.4	7.3	1	E
Taunton	768	1238	1293	6.0	4.4	1	F
Berks & Hants	626	1022	1082	6.3	5.9	1	G
Gt. Bristol Mainline	11672	18434	19660	6.0	7.2	1	H
Cheltenham Line	2112	3862	4018	7.4	4.0	1	I
Swindon	2117	3039	3235	4.8	6.4	1	J

Year Sets

1. Earliest=2002/03, Late-1= 2010/11 and Latest=2011/12 (Financial Years)
2. Earliest = 2001, Late-1= 2010 and Latest=2011 (Calendar years)

Stations/Branches

A. Liskeard, Bodmin, Par, St Austell, Truro, Redruth, Camborne and Penzance stations
B. Barnstaple, Gunnislake, Looe, Newquay, Falmouth and St Ives branches
C. Exmouth branch
D. Torquay & Paignton stations
E. Tiverton, Exeter St D, Teignmouth, Newton Abbot, Totnes & Plymouth stations
F. Taunton station
G. Pewsey, Westbury, Frome & Castle Cary stations
H. Chippenham, Bath, Bristol Parkway, Bristol TM & Weston-s-mare stations
I. Kemble, Stroud, Stonehouse, Gloucester & Cheltenham stations
J. Swindon station

Sources

For Year Set 1 & 2 the base source of passenger numbers is from ticket sales via the LENNON system. For Year Set 1 this is taken from the analysis by Delta Rail for ORR on their website. Year Set 2 for the Devon & Cornwall Community Rail (CR) branches and the Exmouth branches has the same base source with data passed from Wessex Rail and FGW with non-LENNON tickets added and passed to Devon & Cornwall Rail Partnership.

Annex B – The Economy and Population of parts of the SW compared to South Wales and some HS2 economies

AREA	GVA £bn 1999	GVA £bn 2011	GROWTH % 1999/2011	Population census 2011	GVA/Pop 2011
Swindon	3.92	5.70		209,156	(£27,273)
Wiltshire	5.20	8.46		470,981	
SWINDON & WILTS	9.12	14.16	55.3	680,137	£20,824
Gloucestershire	8.03	12.11	50.8	596,984	£20,284
Bristol City	7.44	11.73		428,234	
Bath, NE Som, N Som, S Glos	8.05	14.31		641,349	
GREATER BRISTOL	15.49	26.04	68.1	1,069,583	£24,345
Somerset County	5.44	9.09		529,972	
Devon CC, Plymouth, Torbay	11.60	19.21		1,133,742	
Cornwall & Isles of Scilly	4.11	7.51		532,273	
FAR SOUTHWEST	21.15	35.81	69.3	2,195,987	£16,307
Monmouthshire & Newport	3.12	4.69		237,059	
Cardiff & Vale of Glamorgan	6.18	10.05		472,426	
Bridgend, Neath & Port Talbot	2.73	4.21		278,990	
Swansea	2.41	3.72		239,023	
SOUTH WALES LINE	14.44	22.67	57.0	1,227,498	£18,468
Some HS2 Comparators					
Merseyside	15.54	23.06	48.4	1,381,189	£16,698
Greater Manchester	32.12	48.20	50.1	2,682,528	£17,970
Sheffield	6.39	10.00	56.5	552,698	£18,115
Leeds	12.10	18.00	48.8	751,485	£23,953
Derbyshire & Nottinghamshire (Including Derby & Nottingham)	24.30	37.08	52.6	2,109,920	£17,571

Sources: ONS & 2011 Census

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