

Appendix 1: Review of progress against 2022/23 business plan

1. During 2022/23 Solent made good progress against the previous Business Plan, the key highlights of which are summarised below:

Delivery of the FTZ programme, continuing to Summer 2024:

2. Significant progress has been made throughout 2022/23 against the Solent Future Transport Zone (FTZ) programme goals. The programme continues to be both challenging and exciting in equal measure given its innovative nature.

Notable achievements and activity during 2022/23- FTZ Programme level:

- Full review of FTZ team structure to determine current and future resourcing requirements;
- Successful recruitment to four roles within the FTZ team, with additional recruitment in progress;
- Commission of Transport Research Laboratory (TRL) as our monitoring and evaluation (M&E) partner for the programme;
- Year two monitoring and evaluation reports were submitted to Dept for Transport (DfT) and NatCen in October 2022;
- Endorsement from DfT for a year's extension of the current programme to June 2025, following submission of a business justification paper - this will provide additional time for measures to be established, delivery against objectives and scope for comprehensive M&E to be undertaken to demonstrate value;
- Hosted International Transport Forum conference event of behalf of the DfT (Oct 2022);
- Planned and delivered a 2 day 'Future Transport Forum' conference (Jan 2023)
- Increased following on Solent Transport's social media channels of over 100% in last 12 months; and
- Solent FTZ programme continues to attract a very high level of interest and requests to share progress and learnings remain frequent.

Theme 1 - Personal Mobility:

3. Mobility as a Service platform - Breeze App
 - 'Breeze' secured as brand name for our Mobility as a Service (MaaS) app. Intellectual Property Rights (IPR) acquired and branding identity/guidelines produced.
 - Breeze secured a Travel Agent Licence (TAL) from Rail Delivery Group (RDG) to enable the retailing of rail tickets.

- Breeze made available to the public to download on 3rd October 2022. Launch version of the app focussed on journey planning functionality and integration of micromobility modes (rental e-scooter & bikeshare) and the bus network.
 - All prospective / core Mobility Services Providers (MSPs) have been signed up to the platform using an MoU agreement.
4. Beryl Bikes by Breeze
- Following a comprehensive bikeshare procurement exercise Beryl were appointed lead provider. A procurement framework was developed that enables other regional local authorities to call-off from.
 - Beryl Bikes by Breeze formally launched in Southampton, Portsmouth and the Isle of Wight with both pedal bikes and e-bikes on 3rd October 2022.
5. Rental E-Scooters
- Rental E-Scooter trial extensions approved at all participating local authorities until May 2024, in line with the DfT's national trial extension.
 - Voi continue to operate the trial in Southampton (1250 e-scooters) and Portsmouth (825), and Beryl operate the trial on the Isle of Wight (85). The Solent Transport rental e-scooter scheme is one of the most successful/effective and is the 5th largest in the UK in terms of journeys made using the scheme.
6. Breeze for Business (formerly lift share):
- Project developed to work directly with key trip-generating sites to influence travel behaviour change of staff, visitors and customers through uptake of the Breeze app.
7. Mobility Credits:
- Project rescoped with Havant Borough Council reengaged. Project plan co-developed with a view to launching in 2023 following wider Breeze launch.
8. Dynamic Demand Responsive Transport (DDRT):
- Project proposal reviewed/reframed and dedicated project manager appointed.
 - Procurement of back office booking management system in final stages.

Theme 2 – Sustainable Logistics:

9. Drones:
- Reports and recommendations being finalised following completion of summer test flying activity.

- New procurement activity in progress to enable new workstream trials throughout 2023.
10. Macro/Micro logistics:
- Macro-consolidation: A review of historic Delivery and Service Plans in Southampton has been undertaken to identify opportunities to trial projects. Evaluation completed on the role and impact of the Southampton Sustainable Distribution Centre (SDC). Exploration of other trial projects including university halls consolidation and supplier consolidation opportunities with businesses.
 - Micro-consolidation: Comprehensive data analysis exercise undertaken to determine scope and demand for project activity. Engagement is taking place with stakeholders and industry partners to explore project opportunities, shared objectives, and local issues. A shortlist of potential trials has been identified and working groups have been formed to progress.

Solent Transport Strategy

11. A key item of work on Solent Transport's Business Plan for 2022 was to commence development of a Solent Transport strategy. Significant work has been undertaken this year on producing and agreeing a detailed specification of the requirements of the Strategy and agreeing this with LTA partners. As noted in the 2022 Business Plan, one of the constraints on progressing this large item of work was capacity within the core Solent Transport team (which numbers only two staff), and a key action in the 2022 Business Plan was to secure additional dedicated capacity to deliver this important piece of work and initiate the project.
12. It was decided that procurement of a consultant represented the best way to provide this additional capacity (although other potentially more cost effective options such as secondments were considered). Solent Transport first prepared and circulated a draft brief for a consultant to deliver this project in March 2022. Following a lengthy process of review and engagement involving all four LTAs but resulting in relatively minor changes, a final brief setting out a preferred approach to the project was agreed in September/ October, which enabled Solent Transport (with support from PCC's procurement team) to advertise an opportunity to the market via a two stage procurement process commencing in October 2022. Following evaluation of sifting briefs in November 2022, three consultants were invited to submit full tenders, with the appointed consultant (ITP) selected in February 2023 to deliver the project closely in line with the agreed brief.

To continue to operate the Sub-Regional Transport Model (SRTM) and further explore development & improvement options Solent SRTM Model

13. The Solent SRTM model has continued to significantly support the transport planning activities of our four Member LTAs over the last year.
14. During 2022, the model was used by three of our four Member Authorities (in some cases on schemes being jointly promoted with Network Rail and National Highways), as well as by one private developer, on ten distinct model studies/commissions (down from 19 distinct studies during 2021). Notably the model was not used for any Local Plan related studies, and relatively few development-related studies overall. Despite a lower level of activity than in some recent years, the model has continued to support development of important transport projects such as:
 - Waterside Rail final business case (HCC/ Network Rail)
 - Portsmouth City Centre North regeneration business case (PCC)
 - Southampton TCF programme scheme changes (SCC)
15. A key activity which was completed during July 2022 was re-procurement of a consultant to operate the model. This completed a process which had begun in summer 2021, and resulted in Systra (the incumbent consultant) being successful in retaining the contract to operate the model until 31st July 2025 (with potential for up to 4 years of further annual extensions).
16. This is a good example of Solent Transport working more commercially to drive down cost for the partnership and help make the future operation of the SRTM more fiscally sustainable. The process has resulted in cost savings of around 20% on typical model commissions. Client (end user) rates remain unchanged, with the saving on Systra fees taken to increase income to the model upgrade/maintenance reserve. Systra are also introducing some improvements to client management processes and tools which may help to slightly reduce Solent Transport staff time spent administering SRTM commissions. This procurement process was a group effort led by Solent Transport with support from HCC and PCC procurement teams as well as transport officers from all four LTAs.
17. During 2022 further model maintenance work was carried out –updating the model reference cases (scenarios for each of the model’s future years containing only committed transport and development schemes, together with key economic and other data, which act as key “building blocks” for many model studies) and a validation of forecast journey times in the 2019 base model.
18. Both these activities have taken longer than expected to complete due to late publication of key data (TEMPRO) by DfT. At time writing there are significant questions regarding the quality of the new DfT TEMPRO 8 data which is likely to further delay the completion of these tasks (which would otherwise have been completed by late 2022).
19. Additionally following a successful funding application by Solent Transport, TFSE will be providing £62,000 of support to cover most costs of the

reference case updates work. This work along with the development work already progressed on the SRTM, will sweat the present model asset to its maximum value, providing a potential additional two years before a full upgrade/rebase is necessary. A full rebase of the model to fully represent post-Covid travel patterns remains outstanding, and will be a large piece of work with a long lead time to delivery that will need to be initiated during 2023 to avoid potentially serious negative consequences (lack of a suitably up to date transport model) for the four partners in the medium term.

20. It is also notable that SRTM has gained recognition amongst neighbouring authorities as an example of good practice. In yet a further example of Solent Transport's regional leadership in best practice, and with funding support from TfSE, Solent Transport, Partner LTAs and Systra are supporting Brighton and Hove City Council (who are developing a new transport model for their area) through provision of several workshops and training exercises centred on sharing best practice in strategic optioneering and related uses of SRTM, to assist BHCC officers to prepare to make effective use of their new model.

To work with the Partnership for South Hampshire (PfSH) on the creation of a 'Statement of Common Ground'

21. This work has been led by the LTA partners during 2023 with minimal involvement by Solent Transport. However, there is presently a proposal being considered by SMB for an extension to the work of the consultant appointed to lead development of the Solent Transport Strategy, to consider several strategic land use and transport planning issues in greater depth. The PfSH work is currently unfunded, if funded, it would likely require Solent Transport to participate more actively on strategic land use planning matters in the coming year.

Profile-raising, marketing & branding

22. Solent Transport has been particularly active in this area this year and delivery of the FTZ programme (particularly the public launch of the Breeze app and expansion of the bike/ e-bike share trial) will drive further increases in marketing activities in the coming year:
 - The Solent Transport website had 16,008 views in total over the last calendar year, of which 20% (3,194) were for the FTZ page. For the October to December 2022 time period compared to October to December 2021, there has been:
 - a 10% increase in website views
 - a 27% increased in engagement time (amount of time visitors spend on our website)
 - a 184% increase in engaged sessions per user (a metric for how long each user spends on the website each time they visit)

- Braze, a customer engagement platform, was successfully procured and the team are undertaking training to use this software for the implementation of the behaviour change strategy.
- The Braze platform allows us to design campaigns within the Breeze ecosystem using push notifications, in-app notifications and emails. Using Braze, Breeze can target individual audiences based on their specific in-app activity or unique personal attributes. This supports the wider Breeze app/ FTZ behaviour change strategy as well as supporting timely and effective messaging and promotion to users based on insight and evaluation.
- The Breeze brand is now present on all micromobility vehicles and infrastructure, across the region, in support of the app's launch in Spring 2023.
- The brand identity for Breeze has been further developed and is supported by comprehensive brand guidelines and a marketing and promotion strategy.

23. Conferences/Dissemination:

- Webinar hosted by ForuMM on the ethical use of data in micromobility- March 2022
- Hosted the International Transport Forum on behalf of DfT in October 2022
- Presentation to Smart Class on air quality
- Webinar on transport innovation at the Transport Innovation Summit
- Keynote speaker at MaaS Scotland Conference
- Speaker and panelist at Transport Ticketing Global Conference
- Speaker at 3rd International Conference on Evolving Cities
- Speaker at Transit Ticketing and Fare Collection MENA 2022
- Speaker at TCF22 Conference
- Presentation at Transport Smart Class on sub-regional partnerships
- Webinar for LGTAG Strategic Transport Board
- Speaker at Transport Innovation Summit
- Webinar on e-scooter trials for Transport Planning Society
- Webinar on share mobility for Local Government Assoc.
- Lecture on micromobility for BHASVIC

24. Social media:

- During 2022 Solent Transport's Twitter account following has increased by 320% (to 93 followers as of Feb 2023).
- Over 100% increase in Solent Transport's LinkedIn followers in the last 12 months. Follower levels for Solent Transport (699) are now close to the numbers for TfSE (788 followers).

- LinkedIn engagement is high. Over the last year, Solent Transport achieved a better post to engagement ratio than TfSE and the West of England Combined Authority, suggesting that our content is of high interest to the wider industry.
- Launch of the Breeze social media channels on Facebook, Instagram and Twitter.

25. Media Coverage:

- Press coverage relating to Solent Transport and the Solent FTZ projects has reached over 9 billion people¹.
- Last year's coverage of the drone project was picked up in over 400 local, national and international media outlets.
- Intelligent Transport's highest viewed article of 2022 was an interview with Chris Hillcoat and Steve Longman about delivery of the Breeze (MaaS) app project
- Coverage of the launch of Beryl Bikes by Breeze included interviews with Joint Committee members from SCC, PCC and IoWC on Wave FM and by the Local Democracy Reporter for the BBC.

Solent Go

26. In partnership with local bus operators (via South Hampshire Bus Operators Association- SHBOA) Solent Transport manages the Solent Go multi-bus operator ticketing scheme. A range of tickets across all bus operators in the Solent area is available via:

- Paper tickets
- M-Tickets (QR Codes) - via bus operators own apps; and
- ITSO Smartcard products- via SCC's Smartcities back office system

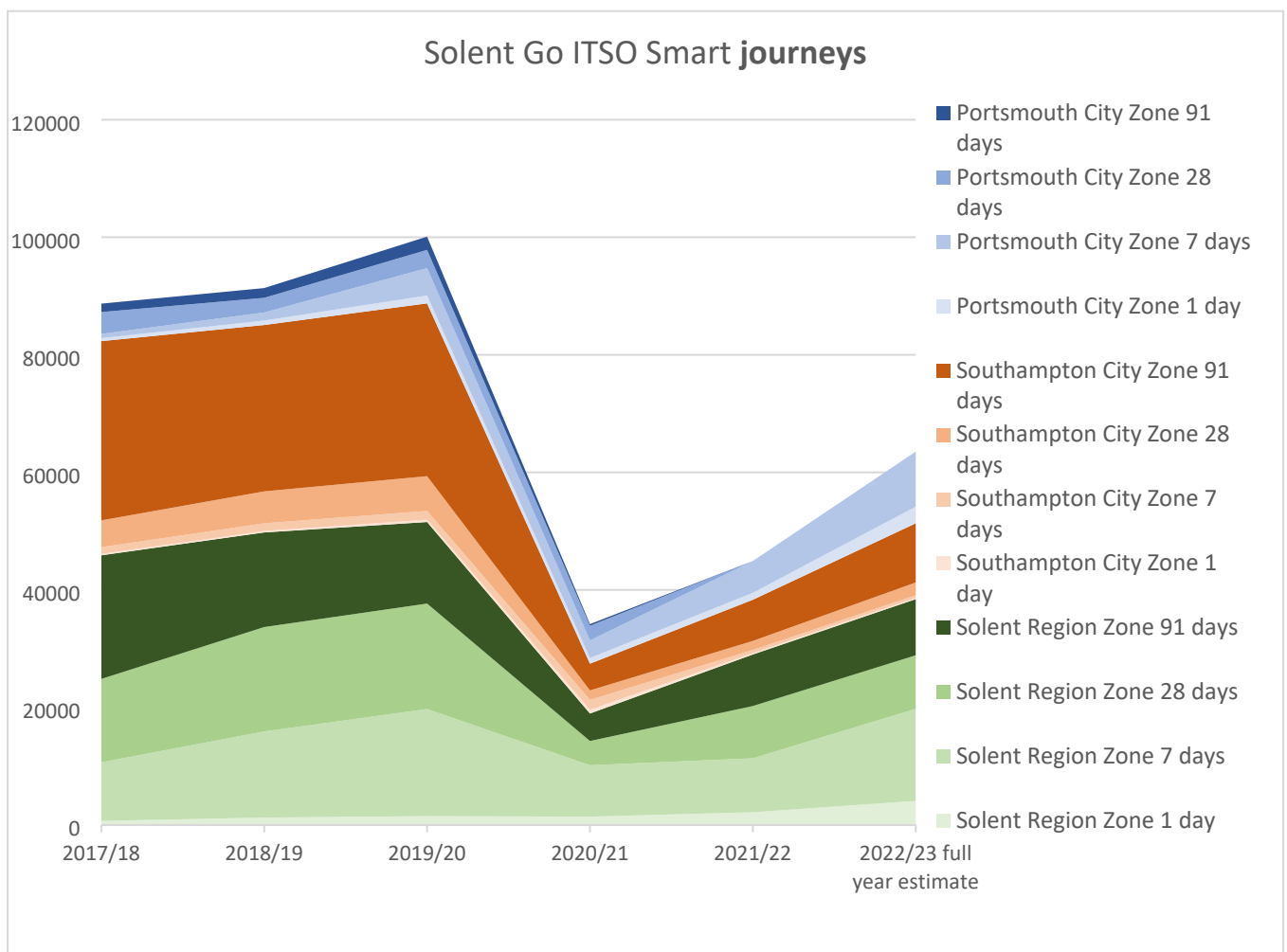
27. The 2022/23 Solent Transport Business Plan reported that Solent Go ITSO smartcard sales were struggling to recover from drops in usage during the Covid-19 pandemic and this meant the transaction costs per journey made using ITSO products had increased significantly.

28. The situation a year later is largely unchanged. Sales of long period products (28 and 91 day passes and SCC staff passes) are now much lower than in 2019 and before, whilst sales of shorter period (1 and 5 day) ITSO products have recovered for the Solent region and Portsmouth city products and look to be exceeding pre-Covid levels (although the growth in sales of Portsmouth

¹ This number does not reflect the actual number of people who have seen coverage, but rather the predicted "reach" of coverage where an individual may encounter the coverage hundreds of times.

city zone is primarily due to provision of Solent Go cards to Ukrainian refugees living in the city, rather than due to sales to the public).

29. Southampton city zone ticket sales remain lower than Portsmouth and the 1 & 5 day product sales are very low - reflecting competitive pricing for operator's own products in the Southampton bus market during 2022.
30. The observed patterns make sense as many users move away from long period products to daily tickets as a result of not being in the workplace as regularly. The impact of the relatively new Saver 5 carnet tickets (only available via bus operator's own apps) is unknown (as we have not received up-to-date sales data from the operators) but may also contribute to this trend.
31. Whilst the overall number of ITSO product sales (and therefore the back office cost per product sold) has recovered almost to pre-Covid values (of around £5.50 per product) the number of journeys being made is still much lower, as a result of few long-duration products now being sold (significant reduction in Solent region and Southampton 28 and 91 day products shown in the chart below).



32. The effect of this is that the back office cost per journey made is now much higher than it was pre-Covid, rising from 26p to 28p per journey in 2018/2019, to around 41p per journey today (if Ukrainian refugee pass usage is excluded).
33. In summary, there has been a fundamental shift for the worse in the economics of the Solent Go ITSO card system and recent changes in the Southampton bus market may worsen these further (transition to a single operator near-monopoly in the city which will make the Solent Go Southampton City Zone products less relevant). It is also worthy of note that beyond the FTZ period no identified budget exists from the core funding for Solent Go (ongoing operation of the back office system, or marketing, promotion and enhancement budgets). Prior to the FTZ programme, the back office cost for Solent Go was funded from Solent Transport's revenue budget but a combination of inflation of other costs and a decade long freeze on Solent Transport's budgets means that this cost can no longer be accommodated from the existing budget as it stands. However the upgrade to a MaaS product does allow us to explore more fiscally economic ways of delivering digital Solent Go tickets and provides an opportunity for a wider review of the services, ticketing media, and fares provided.

Bus Back Better and Bus Service Improvement Plans (BSIPs)

34. Solent has worked closely with all four LTA's to ensure that committed deliverables within the FTZ programme (primarily Breeze MaaS app and back office; Solent Go enhancements, and the DDRT trial) are reflected in BSIP's and Enhanced Partnerships. A detailed common appendix has been added to all LTA BSIPs outlining regional ticketing initiatives, development of the Breeze MaaS product and other relevant activities delivered by Solent Transport. An update to this appendix is planned for 2023 to support our Member LTAs in the updates to BSIPs which they are required to publish, and it is proposed that this update will seek to incorporate aspects of market research utilised within the FTZ programme around customer service and delivery.

Rail strategy

35. On the Isle of Wight, Solent Transport's long-term support and lobbying for improvements to the Island Line, alongside other partners as part of the IOW Transport Infrastructure Task Force, is now mainly delivered with the last action (major maintenance on Ryde Pier) currently underway. The Ryde interchange scheme, which has secured TCF funding is underway and will further enhance this much-requested step change in provision.

36. On the mainland, “Solent Connectivity” is the working title for a joint Network Rail/ Solent Transport project which is seeking to identify interventions (and develop a business case for delivering these) which would deliver a step change in rail connectivity for short to medium distance east-west journeys between Portsmouth and Southampton and within parts of these two city regions. At present, the rail offer is unattractive compared to driving and rail is failing to capture the market share that it should on east-west journeys within the Solent sub-region. This is primarily because a large number of “local” stations are served only by an infrequent hourly service. The Solent Connectivity project’s core aim is to identify how a more frequent service can be provided at these stations to raise rail’s mode share for these journeys, and offer an attractive alternative to driving trips via the M27 and various congested local roads, whilst avoiding detriment to existing rail passenger and freight flows.
37. DfT have agreed for Network Rail to progress the Solent Connectivity proposals to Strategic Outline Business Case (SOBC) stage but have not provided any funding for this activity. During early 2022, Network Rail and Solent Transport developed an overarching plan for the activities required to develop the SOBC (and the timescales for these). Work to create the SOBC is planned to commence from late January 2023.
38. Lack of an identified budget and limited capacity on the part of Solent Transport, Network Rail, and SWR (a key partner for the project) meant that it has not been possible to allocate significant resource during 2022 to the development of the SOBC. In particular the focus for Network Rail (and other parts of the rail industry) in 2022 has been on the Restoring Your Railway Fund sponsored Waterside Rail final business case, and on continuing the South Western Mainline Phase 2 Strategic Study.
39. Solent Transport has also participated in Network Rail’s Reading Area Strategic Study during 2022, with the primary aim of supporting aspirations for improved rail connectivity between the Solent area and the Midlands and Heathrow Airport, for which Reading is a key connection. Network Rail’s final Reading Area report makes recommendations which include:
 - That inter-regional services from Southampton via Reading to the midlands are increased to 2 tph (up from the pre-Covid 1.5 tph, and the present 0.5tph)
 - Provision for increased freight paths in the Reading area from Southampton to the Midlands and North
 - Potential is identified in a scenario where large additional infrastructure investments occur for an inter-regional service from Portsmouth via Guildford to Reading and beyond (potentially to locations on the CrossCountry or East West Rail networks)
40. The Reading study concluded that “Progression of a more detailed business case appraisal on the ability to improve connectivity on both Reading – Basingstoke – Southampton and Reading – Guildford – Portsmouth working across Western and Wessex Routes and alongside operators is priority. This

should be an opportunity to inform the future shape and scope of CrossCountry services....”.

Other areas of work

41. Solent Transport’s work programme for 2022/23 also included several other objectives that were successfully completed including:
 - Continued liaison and lobbying with TFSE to secure an appropriate level of recognition for Solent in their Strategic Investment Plan, and provide regional best practice and leadership in Future Transport and Freight\logistic strategy development.
 - Continued lobbying and profile raising with DfT, Network Rail and National Highways to obtain better settlements and consideration in future allocations for the region.