



What is important to rail passengers?

28 May2022

About Transport Focus

Transport Focus is the independent transport user watchdog. We represent the interests of:

- rail passengers in Great Britain
- users of England's motorways and major 'A' roads (the Strategic Road Network)
- bus, coach and tram users across England outside London

We aim to make a difference for all transport users.

We are evidence based



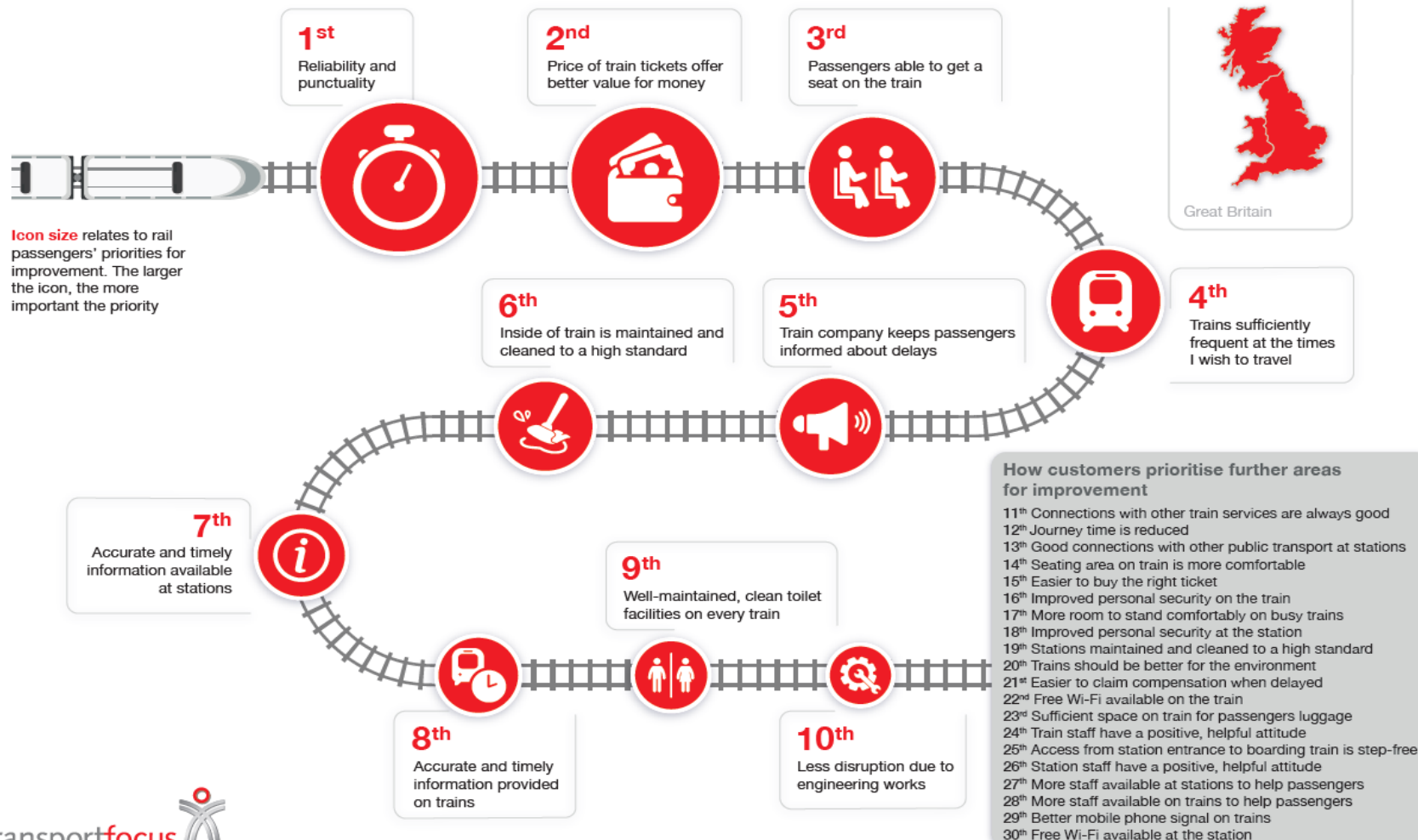
The new normal

- As we return to a new version of our previous lives
- Think about what is important to rail passengers now
- More factors influencing people's transport choices now – hybrid working, cost, Covid concerns
- Attract and retain lapsed and non-users
- It no longer suffices to think in terms of simply commuter, business and leisure traveller



Improving the railway

Rail passengers' priorities for improvement 2020



Rail passengers' priorities for improvement by train company

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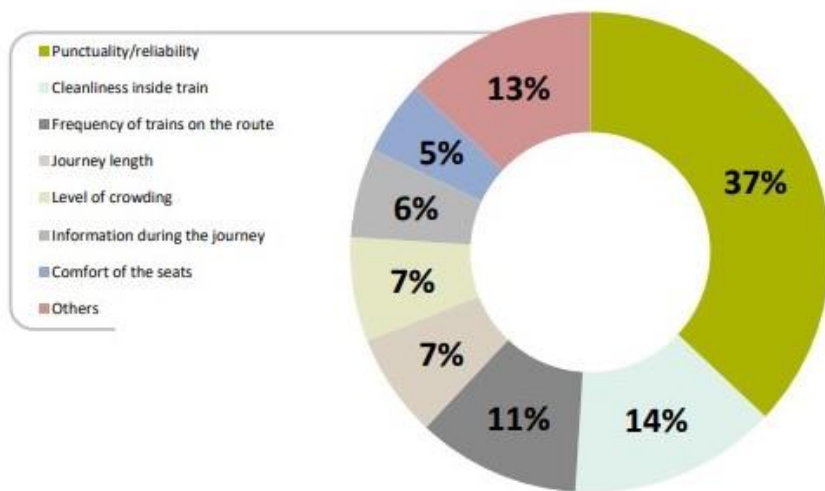
London and South East operators

	London and South East total		c2c		Chiltern Railways		Great Northern		Great Western Railway		Greater Anglia	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Reliability and punctuality	1	246	1	222	1	239	1	255	2	247	1	248
Price of train tickets offers better value for money	2	236	2	217	2	226	2	239	1	251	2	243
Passengers able to get a seat on the train	3	193	3	178	3	218	3	190	3	212	3	189
Trains sufficiently frequent at the times I wish to travel	4	167	4	158	4	157	4	183	4	158	4	165
Train company keeps passengers informed about delays	5	153	6	137	6	137	5	164	5	147	6	155
Inside of train is maintained and cleaned to a high standard	8	134	5	140	5	145	9	126	6	137	9	132
Accurate and timely information available at stations	6	142	8	125	8	130	6	152	8	135	7	142
Accurate and timely information provided on trains	9	133	11	116	9	121	7	142	9	127	8	133
Well-maintained, clean toilet facilities on every train	10	124	7	129	7	131	10	113	7	136	10	127
Less disruption due to engineering works	7	138	9	125	11	103	8	140	10	118	5	163
Connections with other train services are always good	12	103	13	95	12	99	11	107	11	106	12	108
Journey time is reduced	11	107	14	95	10	109	13	98	12	102	11	110
Good connections with other public transport at stations	13	93	16	93	14	90	12	102	13	93	13	96
Seating area on train is more comfortable	16	80	17	84	13	94	17	74	15	88	16	76
Easier to buy the right ticket	14	84	15	94	15	87	15	84	14	90	14	91
Improved personal security on the train	15	82	10	122	17	77	16	79	18	69	15	81
More room to stand comfortably on busy trains	17	76	18	81	16	85	14	84	17	75	18	68
Improved personal security at the station	18	71	12	108	21	67	18	67	23	58	17	68
Stations maintained and cleaned to a high standard	19	67	19	78	20	70	20	63	20	65	20	65
More environmentally friendly journeys	20	66	26	49	19	73	21	62	16	77	21	60
Easier to claim compensation when delayed	21	62	24	59	25	54	22	57	22	61	19	66
Free Wi-Fi available on the train	23	56	27	49	18	76	26	48	21	62	24	50
Sufficient space on train for passengers' luggage	26	50	28	43	23	57	28	41	19	65	27	47
Train staff have a positive, helpful attitude	24	55	23	62	22	58	23	50	24	55	23	53
Access from station entrance to boarding train is step-free	22	57	20	70	24	56	19	64	26	49	22	56
Station staff have a positive, helpful attitude	25	51	25	59	26	54	25	48	25	51	25	50
More staff available at stations to help passengers	27	49	21	69	29	45	24	49	28	43	26	48
More staff available on trains to help passengers	28	47	22	68	30	44	27	44	27	43	28	46
Better mobile phone signal on trains	29	42	29	40	27	51	29	40	29	43	29	36
Free Wi-Fi available at the station	30	36	30	34	28	46	30	34	30	37	30	30
Sample size*	7,703		256		380		218		1,444		722	

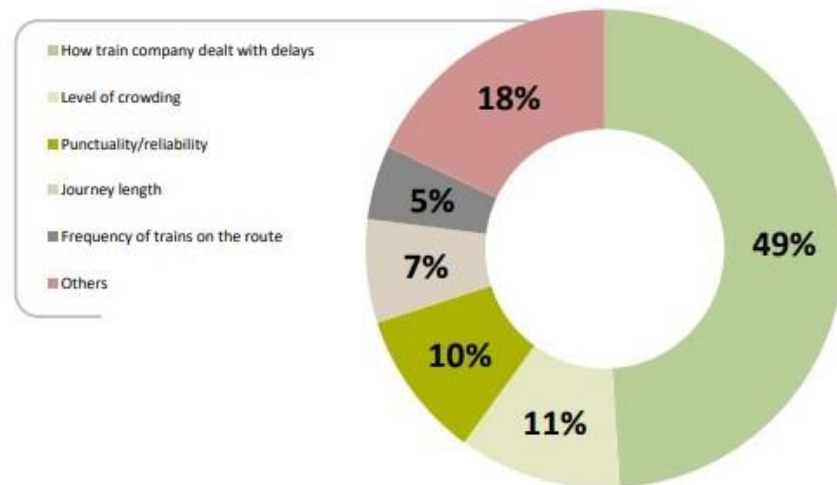
*sample sizes may not add up to the total in each table – see Appendix A.

National Rail Passenger Survey - key driver analysis

What has the biggest impact on overall **satisfaction**?



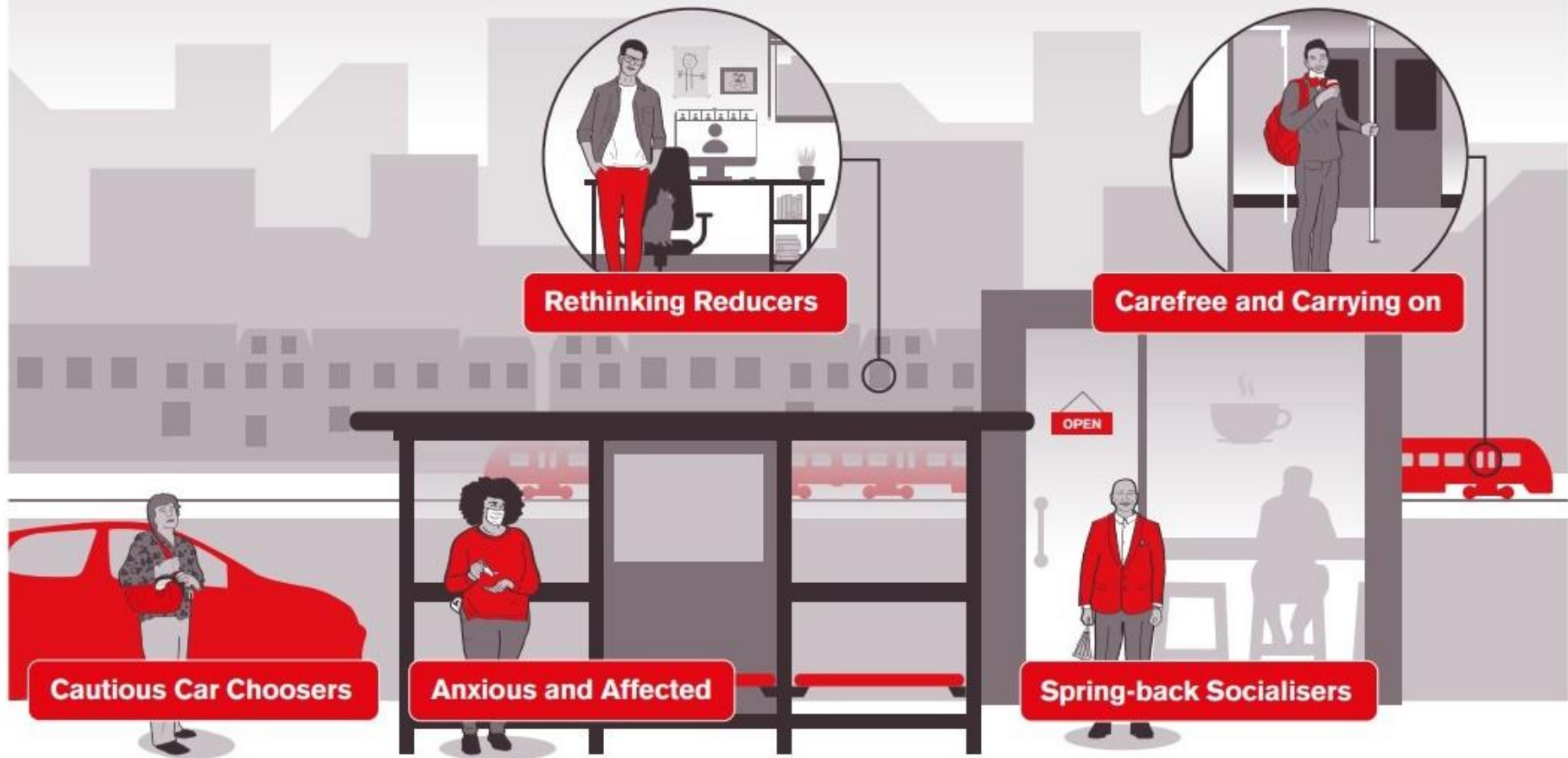
What has the biggest impact on overall **dissatisfaction**?



Passenger perceptions of safety in relation to Covid

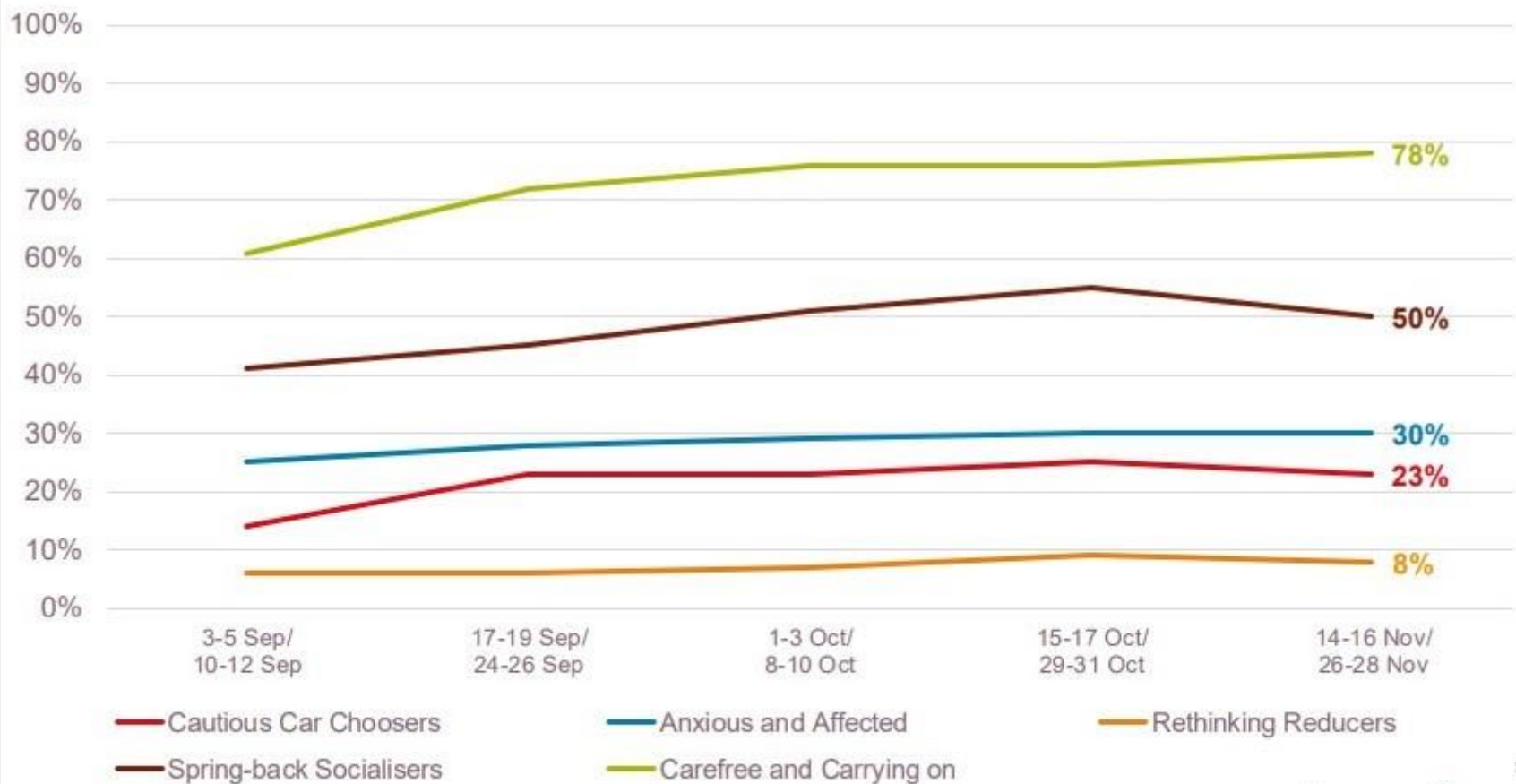


Transport Focus Segmentation Groups



Percentage of segments as comfortable 'now' travelling by train as they were before the pandemic

When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic? Travelling by train
(% 'Now – I am already as comfortable as I was before the pandemic')



What drives passenger satisfaction now?

'Punctuality/reliability' has the most impact on overall satisfaction, followed by level of crowding and cleanliness inside the train.



Sustainable travel

- Aim – to establish a base of knowledge about people's attitude to sustainability in 2021
- Online focus groups and online community
- Exploring attitudes, behaviours and future intentions





Environmental concerns are a low priority when people are deciding how to travel.



There is no clear and credible alternative to current behaviour – making journeys using sustainable transport feels almost or entirely impossible. Consumers have a tendency to be absolutist.

It's impossible for people to imagine change without expecting significant compromise or a more negative experience. People feel such changes would have a high negative impact on 'me'. They feel it would make such an insignificant impact on the problem that it is not worth the sacrifice.

Because consumers don't accept that any other options are feasible, they find it easy to justify their behaviour - even if they do think it isn't sustainable.

"It can be hard to behave 'sustainably' because I am used to travelling by air and car and it's hard to commit to sacrificing this. It's really hard to not act selfishly- especially when it feels that my personal contribution isn't making any difference at all. It's really easy to get discouraged when you see bigger contributors to climate change and pollution not taking enough action themselves."

* Rank order of 'very important' factors among our community - not quantitative data.



Sustainable transport behaviours have both positive and negative associations.

People see sustainable transport as:

Expensive:

- cost of buying electric vehicles
- cost of public transport – especially for families
- general sense (from grocery shopping) that sustainable = expensive.

Inconvenient:

- compromising what is important to them – in other words not getting the speed/directness of travelling by car
- public transport associated with discomfort, stress/uncertainty (particularly in the context of a pandemic).

However, there is the potential that more sustainable transport could offer:

- cleanliness and air quality - reduction of fumes and grime
- quietness of electric vehicles and of there being fewer cars on roads
- efficiency
- health benefits (physical and mental) of walking or cycling.



Conclusion

- Punctuality and reliability is a consistent driver of satisfaction and top priority for improvement among rail passengers
- A punctual and reliable service will serve to attract new passengers and retain all
- Covid remains a concern for certain segments of rail passengers and reassurance regarding crowding information and cleaning will continue to be important
- Sustainability is not currently a key determinant of transport choices, which is down to cost and convenience
- Faster journeys and frequency of service play a part in the convenience decision
- Trains sufficiently frequent at the times I wish to travel is the 4th of the rail passenger priorities for improvement

Thank you

Transport Focus Research

- [Rail passengers' priorities for improvement](#)
- [National Rail Passenger Survey - spring 2020](#)
- [Perceptions of safety on public transport - key drivers analysis](#)
- [Rail Weekly User Survey - What drives rail passenger satisfaction?](#)
- [Covid-19 travel segmentation 5 - 28 November analysis](#)
- [The journey towards sustainable travel](#)

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