



# Integrated Transport perception and reality

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# Contents

<b>1</b>	<b>Foreword</b>	<b>1</b>
<b>2</b>	<b>Introduction</b>	<b>2</b>
<b>3</b>	<b>Method</b>	<b>2</b>
<b>4</b>	<b>Sample</b>	<b>2</b>
<b>5</b>	<b>Key Findings</b>	<b>2</b>
	<b>Current journey mode used</b>	<b>2</b>
	<b>Reasons for choosing current mode of transport</b>	<b>2</b>
	Reasons for choosing current mode: Quantitative results	2
	Reasons for choosing current mode: Qualitative results	3
	<b>Estimated journey time</b>	<b>3</b>
	Estimated journey time: Quantitative results	3
	Actual journey time: Qualitative results	4
	<b>Information sources used to plan journey</b>	<b>4</b>
	Information sources: Quantitative results	4
	Actual information sources used: Qualitative results	5
	<b>Access and egress to rail stations</b>	<b>5</b>
	Proposed access and egress modes: Quantitative results	5
	Actual mode used to access/egress rail station: Qualitative results	5
	<b>Barriers to rail use</b>	<b>6</b>
	Quantitative results: Unprompted	6
	Quantitative results: Prompted	6
	Barriers to rail travel: Qualitative results	8
	<b>Improvements that could be made to encourage rail travel</b>	<b>8</b>
	Improvements: Quantitative results	8
	Improvements: Qualitative results	10
	<b>Conclusion</b>	<b>11</b>
	<b>Contact us</b>	<b>11</b>
	<b>Appendix A: Quantitative survey questionnaire (please see website)</b>	
	<b>Appendix B: Qualitative discussion guide (please see website)</b>	

# Foreword

Over the past 10 years the number of passenger journeys on the railway has grown by around 40%. Britain's railways are now carrying more passengers than at any point over the last 50 years; despite this many people do not use rail at all or only do so on an infrequent basis.

This research was jointly commissioned by Passenger Focus and the Association of Train Operating Companies (ATOC) to understand how the rail industry could attract more people onto the network; the barriers hampering this; and, particularly, the role that getting to and from the railway station plays when considering whether to travel by rail.

The quantitative survey results revealed that the main barriers to increased rail use were an assumption that the door-to-door journey would take longer, and a belief that using rail would cause extra "hassle" compared to using the car<sup>1</sup> and the perceived cost of the ticket. Concerns about reliability and changing trains were also revealed. Specific issues around getting to and from the station did not feature particularly highly in the ranked list of barriers but were clearly an important part of the whole door-to-door journey. Improving this element would help reduce the door-to-door journey times and the "hassle factor" of public transport.

The qualitative element of the study put these perceptions to the test by encouraging infrequent travellers to 'give rail a go'. Participants found rail services for the most part more comfortable and reliable than they had envisaged. Perceptions on cost were in some cases challenged and in some cases reinforced – i.e. some found rail travel to be cheaper than they had expected, while some found it to be as expensive as they predicted. The journey to and from the station played a relatively minor part in the overall view of the journey – most participants, because they were making an unfamiliar journey, chose to drive or walk to the station, rather than catch the bus or cycle.

In conclusion, the quantitative stage of the research provided a useful summary of the perceptions that dissuade non-users from using rail. The qualitative stage demonstrated that, when put to the test, a number of these concerns was actually unfounded. The research indicates that the rail industry could attract more passengers by improving perceptions of travelling by train, particularly around value for money, and by working with other public transport operators and local authorities to try to reduce the overall "hassle factor" of switching from the car.

## What next?

As noted above, the two key issues highlighted in the research were value for money, and the "hassle factor" of using rail. Both Passenger Focus and ATOC are working with stakeholders to address some of these issues:

### 1 Value for Money

The quantitative part of this study indicates that the rail industry could attract more passengers by improving perceptions of value for money. The qualitative part of the study showed that, in a number of cases, rail journeys were not as expensive as people believed them to be.

Passenger Focus and ATOC are working with the rail industry and other stakeholders to draw attention to these conclusions, and to discuss what more can be done in the wider area of value for money. Recent Passenger Focus research<sup>2</sup> has revealed that this is also a priority for existing rail passengers. ATOC and its members are working on a number of initiatives to address this.

### 2 Hassle factor

ATOC, Passenger Focus, Department for Transport, rail and bus operators, local authorities and many other stakeholders are involved in many projects to improve passengers' door-to-door journey experience and reduce the "hassle factor" of using public transport. The majority of activity is at a local level<sup>3</sup>, although there are two national projects that should be highlighted:

- a Station Travel Plans: ATOC is currently running a pilot project at 31 stations nationally, to provide environmentally friendly access options for people traveling to and from stations and to increase patronage on the rail network. The sample of nine stations used in this research are all Station Travel Plan pilots, and the findings for each station will be made available to the pilots to assist with their activities.
- b Journey Solutions Partnership: ATOC, Passenger Focus, bus and rail operators are working with the Department for Transport, local authorities and other stakeholders to promote a number of integrated transport initiatives. This includes the PLUSBUS bus-rail ticket which is now available at over 270 towns and cities nationwide and can also be bought online with a rail ticket.

See [www.stationtravelplans.com](http://www.stationtravelplans.com) for more information.

See [www.plusbus.info](http://www.plusbus.info) for more information.

<sup>1</sup> The quantitative sample composed of people who expressed a willingness to use rail – i.e. the research screened out people who would never consider using rail under any circumstances.

<sup>2</sup> Fares and Ticketing Study, February 2009, <http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=2526>  
Many examples of good practice at the local level can be found in the recent "Door to Door by Public Transport" report produced by the Journey Solutions

<sup>3</sup> Partnership, <http://www.journeysolutions.com/plans/Door-to-door%20report%20June%202009%20Final.pdf>

# Introduction

Passenger Focus, working in partnership with ATOC, wished to understand the perceptions of passengers towards integrated transport, specifically looking at end-to-end journeys.

## The objectives of this research were:

- To understand the perceptions of and barriers to using rail by non-users and infrequent users of rail; in particular, to assess the importance of station access, egress<sup>4</sup> and interchange compared with other barriers.
- To understand the problems facing passengers making end-to-end journeys and to identify the priorities for improvement.

Two independent market research agencies were commissioned to conduct this project. The quantitative stage was conducted by Accent and the qualitative stage was conducted by Outlook Research.

## Method

This study aimed to gain a better understanding of the role played by integrated transport in attracting new or infrequent passengers to rail.

### A three-phase study was undertaken comprising:

- **Literature review** - to establish whether similar research has been undertaken and, if so, whether it can provide guidance for the current study as well as identifying key gaps which this study can address
- **Quantitative research** – 1,263 computer aided telephone interviews (CATI) with infrequent<sup>5</sup> and non rail users (but not rejecters)<sup>6</sup>

Respondents to the quantitative survey were asked to consider a journey that they had made in the last three months which they could make instead by rail from their local station. This survey therefore gathered respondents' perceptions of rail travel versus the current mode of choice.

- **Qualitative research** – Nine respondents undertook journeys by rail instead of their regular mode for one week and completed audio travel diaries. They then participated in an accompanied journey followed by an in-depth interview.

An additional four in-depth interviews among respondents with disabilities<sup>7</sup> were conducted.

The qualitative research provided a useful "reality check" on the perceptual information gathered through the quantitative phase of the research.

The respondents for the qualitative stage were recruited to the same broad criteria as the quantitative sample (i.e. infrequent and non-rail users).

## Sample

### Infrequent and non-rail users

- The quantitative research was undertaken with residents living in the catchment area of the following nine stations throughout the UK where a rail journey provides direct competition against car or other modes. For the qualitative research four of the nine locations were selected.

Station	Quantitative interviews	Qualitative interviews
Chandlers Ford	141	
Cowdenbeath	145	
Dumfries	140	
Kings Norton	139	1 Accompanied + 1 in-depth
Leeds	140	
Middlesbrough	138	3 Accompanied + 1 in-depth
Milton Keynes Central	141	
Colchester	139	2 Accompanied + 1 in-depth
Shotton	140	3 Accompanied + 1 in-depth
<b>Total</b>	<b>1263</b>	<b>9 Accompanied + 4 in-depths</b>

- It is notable that during the recruitment phase for the quantitative sample nearly a fifth of potential respondents said they would not consider travelling by rail in the future for any type of journey. The main reasons given were cost (23%), disabled/too old (20%) and too much hassle (8%).

## Key Findings

### Current journey mode used

- The trips considered by quantitative survey respondents were made predominantly for leisure (38%) and shopping (34%) purposes. Personal business (10%), employer's business (8%) and commuting (8%) trips were also represented in the research.

- The mode used for the non-rail journey was predominantly car (78%). 18% used bus or coach. No other mode accounted for more than 1%. There was some variation between stations:
  - Car use was highest in Dumfries (85%), Shotton (84%) and Milton Keynes (83%) and lowest in Cowdenbeath (72%).
  - Bus and coach use was highest in Kings Norton (32%) and Cowdenbeath (24%) and lowest in Dumfries (12%).

- The qualitative survey participants were all making journeys by other modes that could be made by rail and were prepared to consider using rail in future. There was an equal mix of those recruited on the basis of making journeys for commuting, business and leisure purposes

### Reasons for choosing current mode of transport

#### Reasons for choosing current mode: Quantitative results

- The main reason given for choosing the current mode of travel was overwhelmingly its convenience, mentioned by 60%. Cost (17%) and speed (6%) were also relatively important. No other reason given accounted for more than 3%.
- There was some difference in reasons given depending on the current mode used:
  - Car users were much more likely to mention convenience than bus/coach users: 66% compared to 41%.
  - Bus/coach users were much more likely to mention cost than car users: 32% compared to 13%.
- If the chosen mode were not available, over half (51%) of

<sup>4</sup> Access – refers to the time taken to get from the origin location to the boarding station.

Egress – refers to the time taken to get from the station to the final destination.

<sup>5</sup> Infrequent users were defined as those who had made no more than two rail trips in the last three months.

<sup>6</sup> Respondents were screened to ensure only those who would consider using rail in the future were chosen for both stages.

<sup>7</sup> Disabilities comprised mobility impairment, age-related mobility difficulties, visual impairment and hearing impairment.

respondents would have used rail and 11% would have used bus, with some interesting differences within the sample:

- Rail was mentioned most in Dumfries (64%), Middlesbrough (58%) and Colchester (56%) and mentioned least in Shotton (44%) and Leeds (45%).
- Nearly a third (29%) would not have made the trip at all. The highest proportions who would not make the trip at all were in Milton Keynes (35%) and Leeds (34%).
- If the current means of transport were not available, 52% of car users would switch to rail and 51% of bus/coach users would use rail instead. However, car users are also much more likely to say they would not travel at all: 31% compared to 22% bus/coach users.
- A fifth (20%) of bus/coach users would use car if bus/coach were not available.

- Distance from the station is an important determinant in potential rail use with those living nearer the rail station more likely to use and consider rail.
  - The average distance from home to station varied considerably, with the distance in Leeds being over three times greater than in Chandlers Ford and Dumfries.

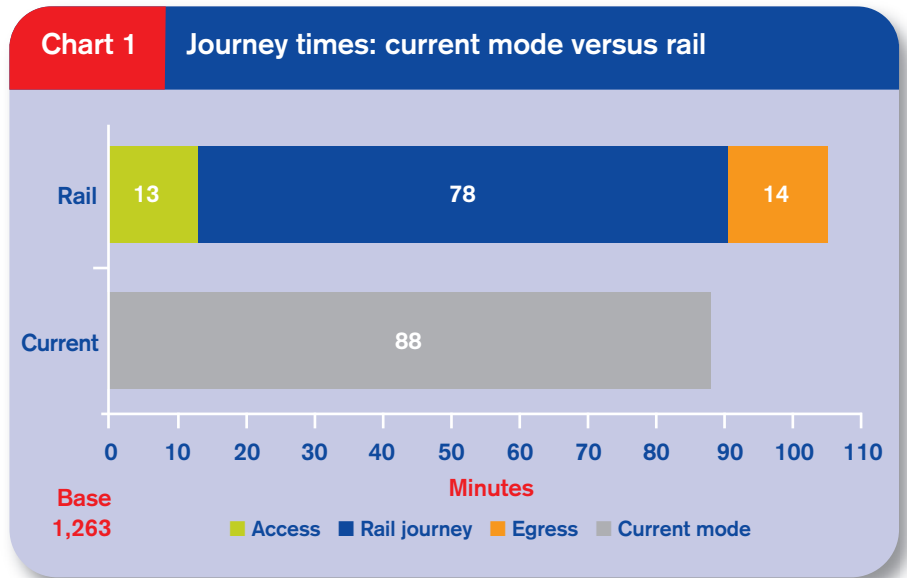
#### Reasons for choosing current mode: Qualitative results

- In the qualitative stage, most respondents were using a car as the default mode for the majority of journeys made. This tended to be regarded as the most natural and convenient mode in most instances, especially for multiple passengers making the journey.

### Estimated journey time

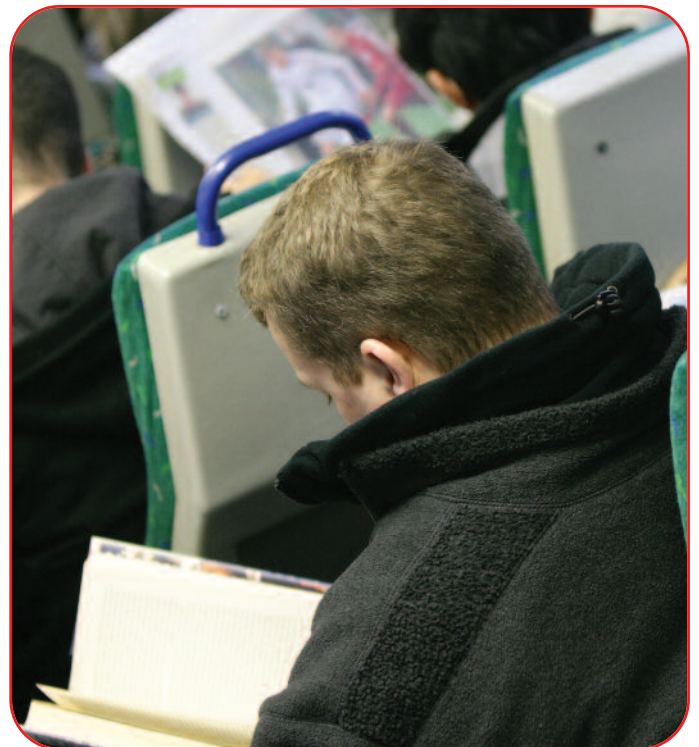
#### Estimated journey time: Quantitative results

- Quantitative survey respondents were asked to estimate the time taken door-to-door for the current mode, then estimate how long the journey would take by rail, including travel to and from the station at either end of the journey.
- It should be noted that the following results are based on the respondent's estimate of journey times. While infrequent rail users would have a good idea of the journey time by rail, non-users may have had little practical experience of making the trip in this alternative way.
- This caveat notwithstanding, the results were quite revealing:
  - The average estimated journey time using the current mode was 88 minutes. The average estimated time for the rail trip including access and egress<sup>8</sup> was 105 minutes.
  - Participants estimated the on-train part of the rail trip to be shorter than the current mode. However, the access and egress time made the overall rail journey time around a fifth longer (see chart 1 top right).



- Generally, rail was perceived to be less competitive for the shorter journeys, with some variation between stations:

- Rail was least competitive with respect to door-to-door time at Chandlers Ford (current mode = 66% of rail time), Cowdenbeath and Shotton (current mode = 76% of rail time).
- Rail was most competitive with respect to door-to-door time at Middlesbrough and Dumfries (current mode = 92% and 91% of rail time respectively).



<sup>8</sup> Access – refers to the time taken to get from the origin location to the boarding station.  
Egress – refers to the time taken to get from the station to the final destination.

**Actual journey time: Qualitative results**

Participants were very positive about direct train journeys. They were almost always faster than expected, and a leisure journey from Middlesbrough to Whitby that took much longer by train was tolerated as being part of the overall enjoyment of the day trip.

When a direct train service was not available, this had an adverse effect on overall perceptions of total journey times, as the common perception was that services would not be timetabled to connect. During the course of the research, one respondent had a poor experience of making a journey with connections.

Ease of station access understandably depended on where respondents lived in relation to the station and the modes available to travel between their homes and their local station.

Total journey times were slower at first as respondents tended to allow too much time to get to the station until the access journey became familiar. Station egress was more of a problem due to lower familiarity with the diverse destinations to which respondents were travelling.

**Information sources used to plan journey**

**Information sources: Quantitative results**

- Over two thirds (69%) of respondents did not use any pre-trip information for their non-rail trip because the journey was familiar. However, nearly four out of five respondents (79%) would seek information when travelling by rail. This implies that information provision may be a barrier to using rail as it is an additional step in making the journey that normally would not be required.
- When questioned about what information sources they would use for their hypothetical rail journey, about a fifth said they would not use any information source and just turn up at the station.
- The remaining four fifths would use a wide range of sources with the Internet mentioned around four times more often than the phone (see chart 2 below).

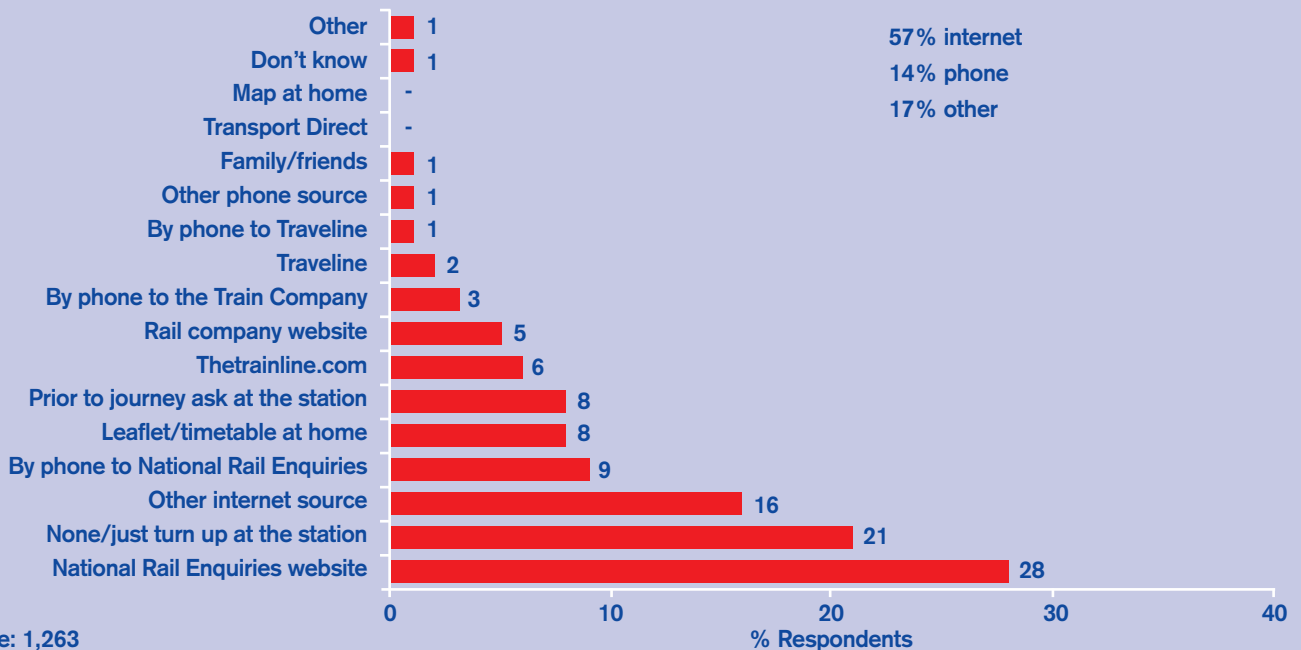
“It’s an easy drive to the train station but then you have to find a parking space, get a ticket and have the right change so it can be quite stressful really”  
Business User, Middlesbrough

“There aren’t enough trains and they don’t connect well enough. Basically they don’t coincide with other forms of transport, they don’t actually meet”  
Commuter, Shotton



“I was expecting to wait for half an hour for a connection but the train came in five minutes which was very good. Maybe they have put more trains on or made them coincide a bit more so you’re not waiting around so long which is good”  
Leisure User, Shotton

**Chart 2** Information sources that would be used for rail trip



**Actual information sources used: Qualitative results**

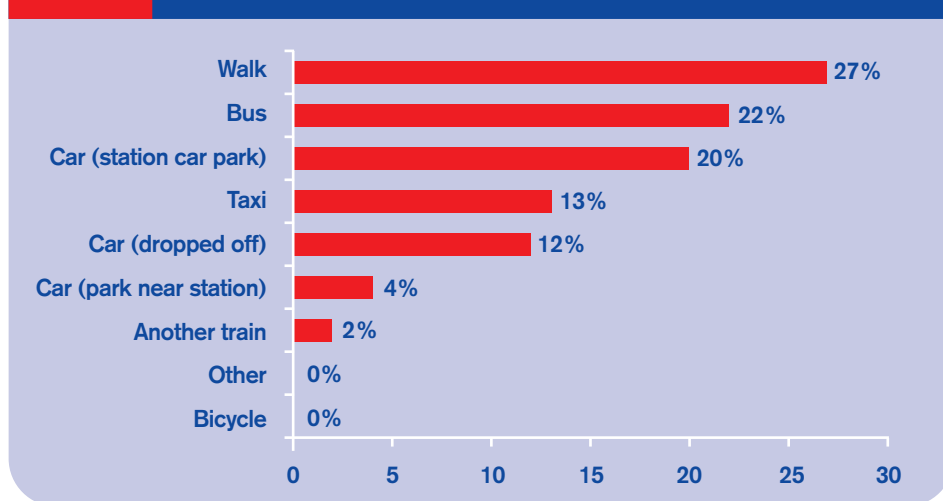
- Most of the respondents in the qualitative phase were surprised at how easy it was to obtain quality information at various stages of their journeys.
- All were recruited on the basis of being unfamiliar with the journey made, and most admitted to having low expectations of the information-gathering process that they were required to go through.
- In reality, however, this proved to be much easier than expected and there were positive reports in relation to all sources used. National Rail Enquiries, and rail staff, were both identified as important sources of information and reassurance.

**Access to and egress from rail stations**

**Proposed access and egress modes: Quantitative results**

- The main proposed access modes to the local station for the hypothetical rail journey were car, (36%), walk (27%), bus (22%) and taxi (13%) (see chart 3, below).
- The egress mode from rail was predominantly walking (49%). Taxi was mentioned by 15%, bus by 14%, car by 12% and Underground/metro/light rail by 9%.

**Chart 3** Quantitative respondents' proposed access mode for rail journey



"I found it easy to get the information. It wasn't a big obstacle. I was better at it than I thought I was going to be" Leisure User, Middlesbrough

The station has TV screens with departure information and the staff are very helpful. They also have leaflets and bus information so the facilities for buying tickets are very good" Commuter, Colchester



"Parking here is £3 a day so if I was doing this journey regularly it would be a problem because it would become quite expensive" Business User, Middlesbrough

"The main reason for not using the bus is that the times are different at the weekend and it's quite a long walk from the bus station to the train station" Leisure User, Middlesbrough

I'd have to wait for a bus to get to the train station and the bus and train times don't coincide so you'd be waiting around even longer" Leisure User, Shotton

**Actual mode used to access/egress rail station:**

**Qualitative results**

- The qualitative exercise provided a very useful additional layer of detail around station access and egress. The following issues with each mode were uncovered:
  - **Car** – while a popular choice, cost and security concerns were often raised: many were unaware that they could get season-ticket discounts on car parking, and some felt unsafe using the car park late at night.
  - **Bus** – many participants cited a lack of familiarity and poor image as barriers. For non-users, the prospect of information gathering was also a significant disincentive. In Middlesbrough it was recognised that there is a good bus service but that it does not serve the railway station.
  - **Cycling** – This mode was regarded as aspirational, with some evidence of good intentions. However, these were outweighed by practical considerations such as the need to carry heavy or bulky



items and by poor weather. There were also some concerns regarding parking facilities and train companies' policies on the carriage of cycles on their trains.

- **Walking** – Even those most receptive to the possibility of incorporating this as part of an exercise regime expressed the same practical reservations as for cycling

## Barriers to rail use

### Quantitative results: Unprompted

- Quantitative survey participants were asked to give the main reasons for not using rail from their local station for the trip they had just described.. More than one response could be given. The main barriers are summarised below and listed in chart 4:

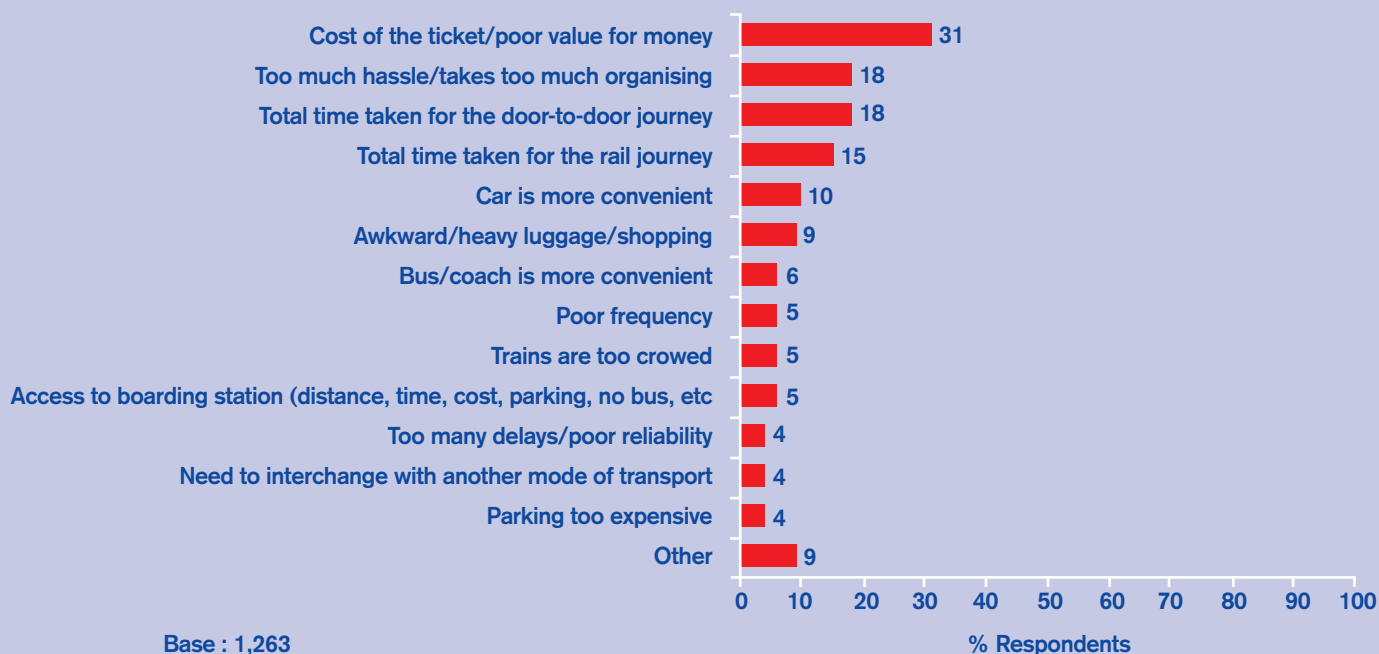
- 'cost of ticket/poor value for money' was mentioned by almost a third (31%). This was specially the case at Milton Keynes (48%).
- The inconvenience of rail was mentioned by over a third: 18% said it was 'too much hassle/takes too much organising', 10%

said that 'car is more convenient' and 6% who said that 'bus/coach is more convenient'.

- The time taken for the rail journey, either total door-to-door time (which includes access and egress) or the time taken for the rail journey alone were mentioned by 18% and 15% respectively – a third overall. 'Total door-to-door journey time' was most important at Cowdenbeath (23%) and least important at Shotton (15%).

- There were some differences by household income, 25% of those on high household income (more than £50,000) stated total journey time as a barrier compared to 14% on a low household income (less than £15,000).
- Overall, access, egress and interchange barriers represented only 13% of all reasons given for not using rail. These factors were the most important at Leeds (where a relatively high proportion of respondents lived a long way from the station), non-rail users, commuters and those living furthest from their local station.

**Chart 4** Main reasons for not using rail – top 13 reasons\*



\*Responses exceed 100% as respondents were able to give more than one reason



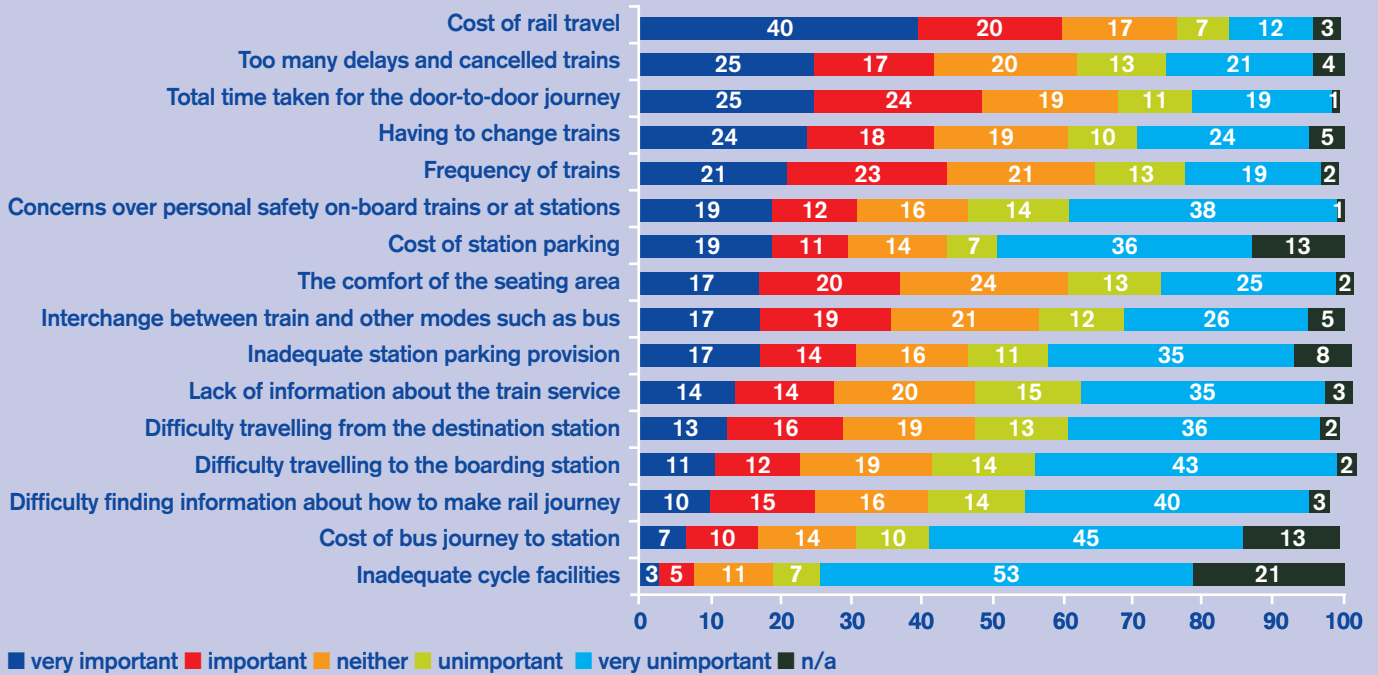
### Quantitative results: Prompted

- All quantitative respondents were then asked to say how important each of 16 barriers were, in their decision not to travel by rail from their local station. The results are shown in charts 5 and 6 (see page 7).



Chart 5

Importance of barriers to using rail (ordered by average improvement rating)\*



\* responses for each barrier may not total 100% because of rounding

The top five barriers were:

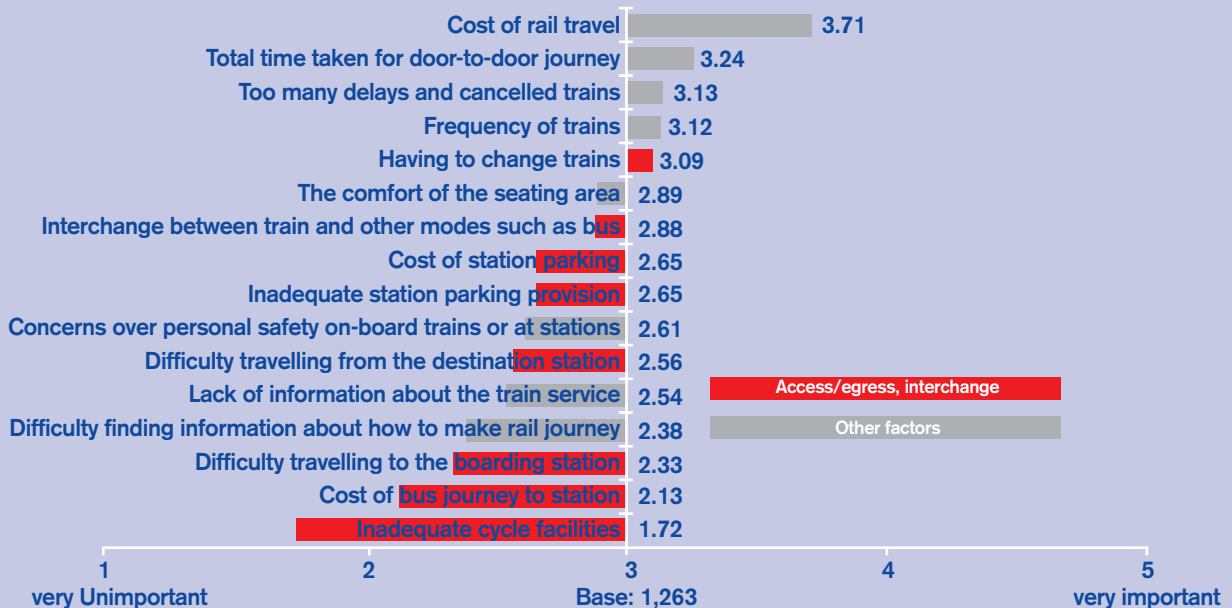
- cost of rail travel (61% said it was important)
- total time taken for the door-to-door journey (49% important)
- frequency of trains (44% important)
- too many delays and cancellations (42% important)

• having to change trains (42% important).

• The main differences between the nine stations were that inadequate station parking provision was most important at Cowdenbeath and Kings Norton, while cost of station parking was most important at Milton Keynes.

Chart 6

Importance of barriers to using rail (average importance ratings)



## Barriers to rail travel: Qualitative results

- In the qualitative research, many participants acknowledged that it was difficult for them to think beyond the habitual comfort of using their cars and were therefore reluctant to consider switching to making journeys by train since they had no incentive to do so.
- However, once respondents had made their train journeys as part of the research process, some were pleasantly surprised and found the overall experience of travelling by rail more enjoyable than anticipated.
- Some of the anticipated barriers identified in the quantitative survey did not represent problems in reality when the rail journey was actually attempted by respondents in the qualitative stage.
- A key factor for many in this respect was the ability to relax on the train rather than having to concentrate on driving.
- A key barrier in relation to cost is that infrequent rail users are unsure how to obtain the best value fare for their rail journeys.
- Many participants in the qualitative work began with the perception that rail travel was more expensive than their current mode. Although some participants had these expectations confirmed, others discovered that making the journey by train was actually cheaper than using their current mode.
- Total journey time emerged as a more consistent barrier than cost, especially for journeys involving a change of train.
- As noted above, experiences of direct train travel in this respect were positive, but infrequent users were concerned about the potential for journeys to be disrupted by interchange problems if travelling on a regular basis.
- Issues relating to access and egress modes were broadly consistent with the findings of the quantitative research. Rather than being a barrier per se, the main problem was associated with interchange.

“I enjoy being able to relax and go to sleep on the Inter City service with comfy seats, rather than concentrating in traffic all the time. That is the thing that has made me reconsider whether I will continue to drive to work” **Commuter, Colchester**

“When I visit my brother in Garsdale it’s a journey of an hour and a half and I’ve got the use of my car when I get there. On the train it would take over three hours because of the connections” **Mobility-impaired, Middlesbrough**

“When I was in Amsterdam I could get a tram from my front door to the train then off the train and onto a bus directly to where I was going without a problem and all the timings were perfect, give or take ten minutes. In Britain we don’t have that and it makes travelling times a lot longer and more tedious and you have to use taxis. It’s just not as well organised” **Leisure User, Shotton**



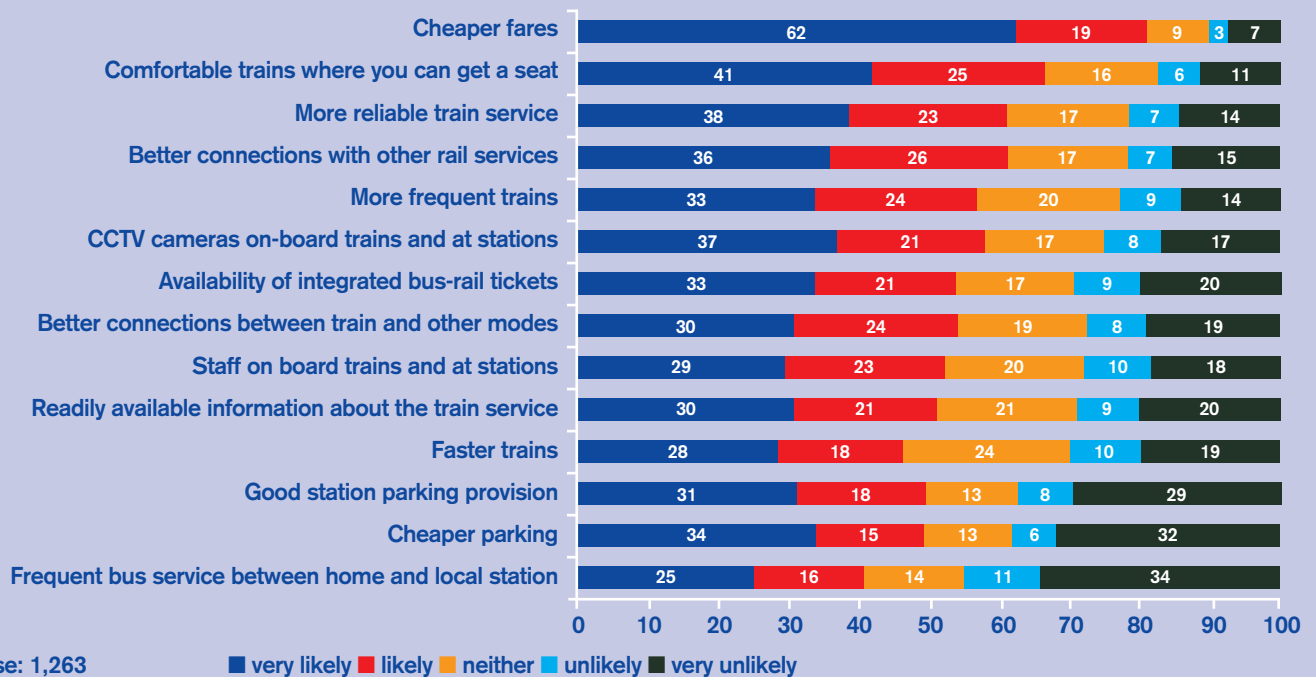
## Improvements that could be made to encourage rail travel

### Improvements: Quantitative results

- Quantitative survey respondents were asked to respond to a list of 14 potential improvements, stating how likely it was that each improvement would persuade them to use rail (see chart 7 opposite). The five attributes most likely to encourage travel by rail were:
  - ‘cheaper fares’ (62% very likely, 19% likely to encourage travel by rail)
  - ‘comfortable trains where you can get a seat’ (41% very likely, 25% likely)
  - ‘more reliable train service’ (38% very likely, 23% likely)
  - ‘better connections with other rail services’ (36% very likely, 26% likely)
  - ‘more frequent trains’ (33% very likely, 24% likely)
- Of the integration improvements ‘better connections with other rail services’ was the most important.



**Chart 7** Improvements that could be made to encourage rail travel<sup>9</sup>



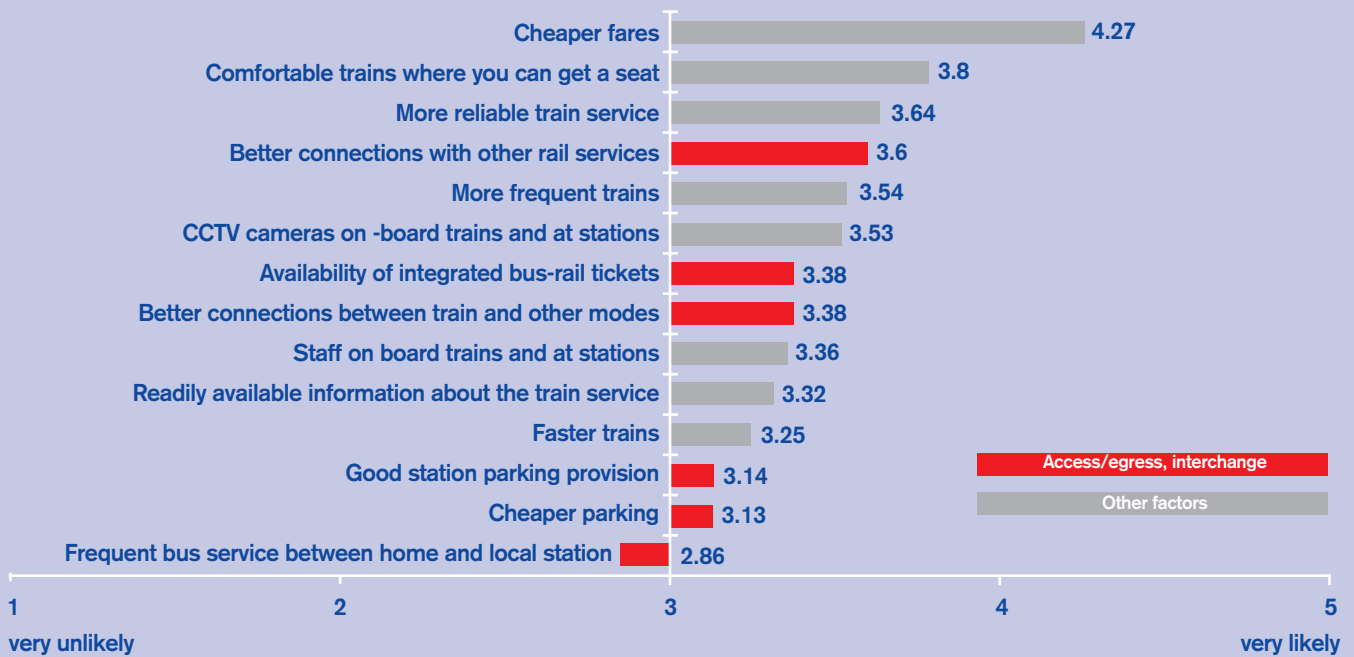
- Chart 8 shows the average likelihood scores against each improvement factor that would encourage rail travel, where 1 = very unlikely and 5 = very likely
- The average likelihood that the improvement would encourage rail travel for the six access, egress and interchange improvements (highlighted in red in chart 8) was 3.25. This compares to 3.59 for the eight other improvements.
- The survey revealed useful findings when broken down by station, income and frequency of use:
  - Access, egress and interchange improvements were most important for Milton Keynes (3.47), Leeds (3.42) and Shotton (3.39) and least important at Chandlers Ford (2.97) and Dumfries (3.06).

- Access, egress and interchange improvements were more important for lower income households: 3.36 for households with incomes under £15k and 3.01 for households with incomes over £50k.
- Access, egress and interchange improvements were more important for non-rail users: 3.30 for those who had made no rail trips in the last three months compared to 3.17 for those who had made two rail trips in the last three months.

<sup>9</sup> The improvements are ordered by the average likelihood rating

Chart 8

Improvement that could be made to encourage rail travel (means)



Improvements: Qualitative results

- The qualitative exercise provided some additional insight in this area, especially in the areas of reliability, comfort and security.
- Respondents had mixed experiences of train reliability. Some were impressed to the extent that the train journey was considered to be more reliable than by car; others who experienced problems or delays had a major barrier confirmed.
- Expectations regarding comfort were generally challenged. Respondents who made journeys on newer trains especially felt that this was an area in which considerable improvements had already been made.
- Safety and security was one of the only significant areas for further improvement to be identified during the qualitative exercise. In spite of visible reassurances (such as CCTV) this was key barrier for some, especially at night.



“I didn’t know the trains ran as punctually as they do, I thought that was very good. My main fear was that I would be left sitting at a station not being able to get home”  
Leisure User, Shotton

“The trains are old and a little bit shabby but they’re always clean so they’re functional but not desirable for a long journey”  
Commuter, Middlesbrough

“The trains are far superior to buses in looks and comfort and are generally a much more pleasant ride”  
Hearing-impaired, Kings Norton

“There used to be a brick shelter at the station which made me feel quite vulnerable at 7.00am because it was still dark but they’ve improved it tremendously now, it’s all glass with CCTV so it’s much better”  
Business User, Shotton



## Conclusion

- The main drivers for current mode choice were convenience (60%) and cost (17%). Car users were much more likely to mention convenience and bus/coach users were much more likely to mention cost.
- A third considered rail for their current trip. Distance from the station is an important determinant in potential rail use with those living nearer the rail station more likely to use and consider rail.
- Rail was more competitive for longer trips and for those who live nearer rail stations.
- The average journey time for the non-rail mode was 88 minutes and the average estimated time for the rail trip, including access and egress, was 105 minutes. Combined access and egress time is equivalent to about a third of the average rail journey time which makes the overall rail journey uncompetitive compared with car.
- The main reasons given for not using rail were inconvenience of rail (34%), cost (31%) and door-to-door journey time (which includes access/egress time (18%)). Other access/egress and interchange issues were relatively unimportant, accounting for 13% of all reasons given for not using rail.
- The main improvements that could be made to encourage rail use were cheaper fares, more comfortable trains with a seat available, more reliable and more frequent trains. Better interchange was the main integration improvement.
- The qualitative exercise indicates that the key perceptual barriers to rail travel can be challenged. Using the train was found to be cheaper than travelling by car for some journeys and it is possible to challenge some negative expectations surrounding reliability, frequency and comfort.

## Contact us

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