Tomorrow's passengers: understanding how to make rail travel more attractive to infrequent and non-users

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transportfocus

Foreword

Over the past 20 years rail passenger journeys in Great Britain have more than doubled. In 2016-17 some 1.7bn journeys were made by rail – the highest since records began in the 1950s. However, there are signs that growth is now slowing and, in some instances, actually declining[1].

All of which gives new impetus to understanding the barriers to using rail. This report from Transport Focus looks at why people do not use rail or only do so infrequently. Passengers with disabilities, younger passengers, those in education, frequent car users, older and retired passengers are identified as groups who could be specifically targeted by train companies.

The report looks at two categories:

- non-users – people who haven't travelled by train in the last 12 months (sample size, 2010)
- infrequent users – people who have travelled by train in the last three months, but who claim to do so every six months or less (sample size, 1528).

We compare the findings from these groups with those who do use rail more frequently (passengers who have travelled by rail in the last three months - base size: 12,804).

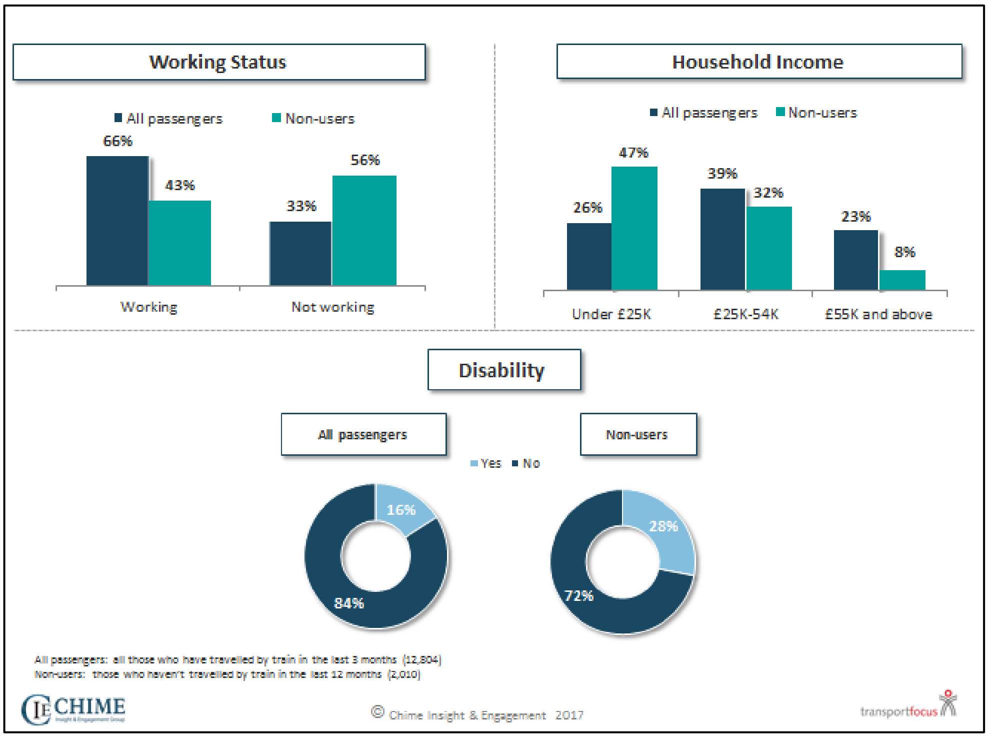
The data comes from our study *Rail passengers' priorities for improvement*, carried out in March 2017.

Who are non-users?

We looked at the characteristics of those who use trains more frequently and compared this with those who had not travelled by rail in the last 12 months. There were a number of key differences – non-users were more likely to:

- not be working
- have a lower household income
- live in a village location
- live further away from a train station
- have a disability.

[1] Passenger Rail Usage 2017-18 Q3 Statistical Release 8 March 2018



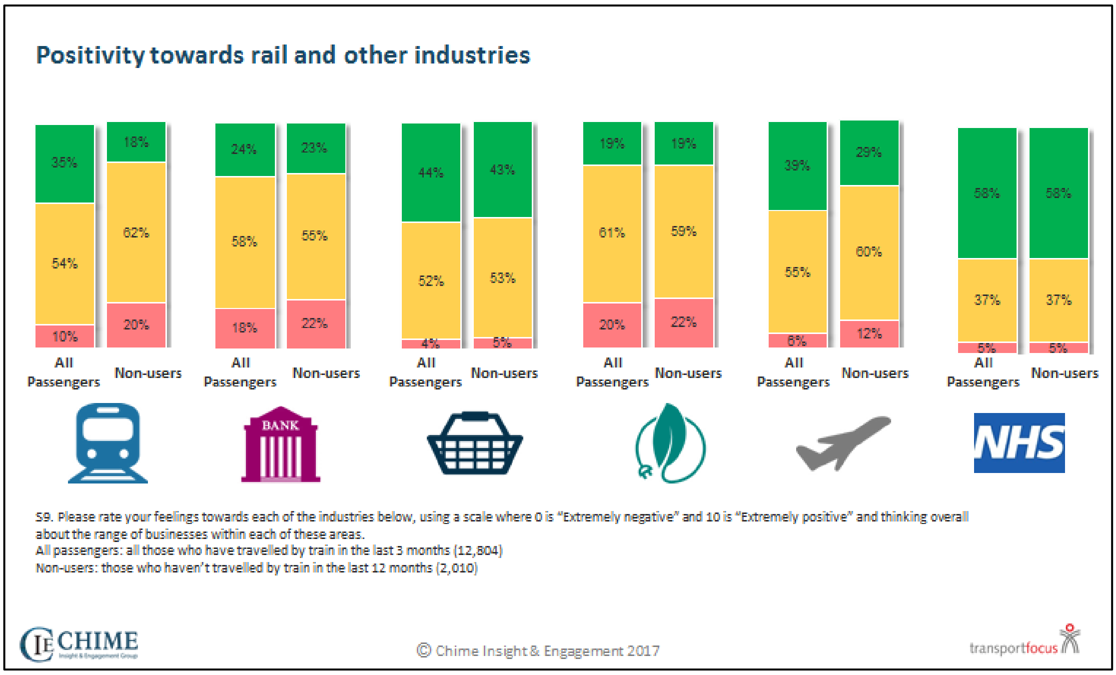
Some of these are more socially-excluded groups, who might be prevented from travelling by train due to factors such as cost. For others it might be driven by lifestyle choices such as living in more rural areas.

For infrequent users, the profile is closer to those of passengers overall. They were more likely than the non-users group to be working (58 per cent), have higher household incomes (31 per cent with income below £25,000) and with a similar proportion of disabled people (15 per cent) – however the main similarity with non-users is that they too are more likely to live in village locations (25 per cent).

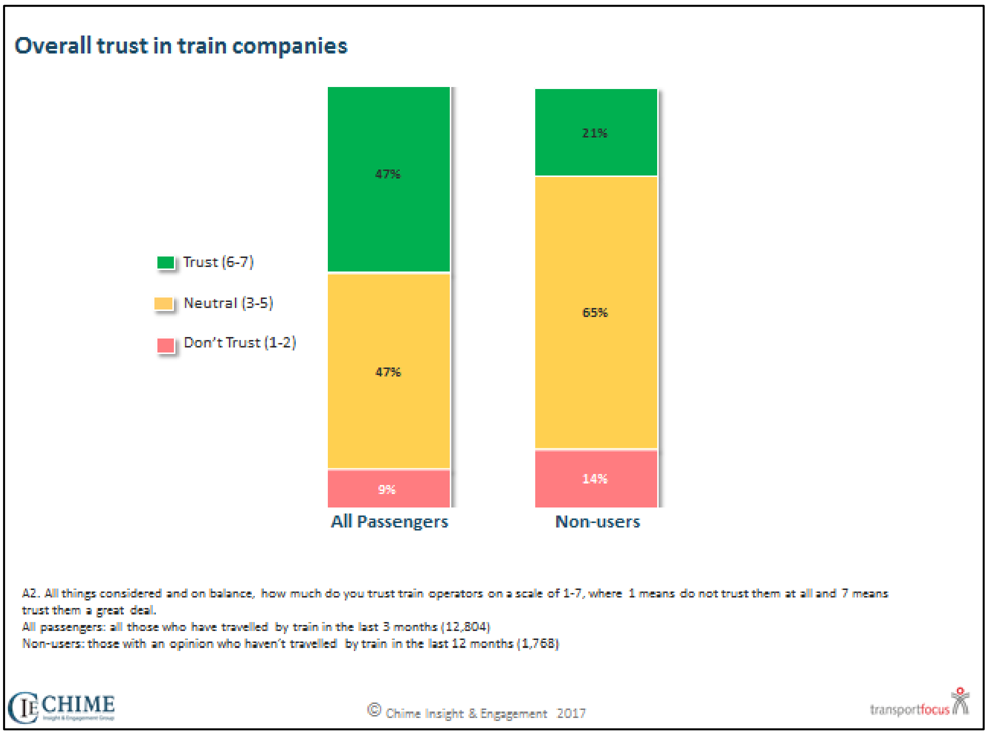
The two alternate modes of transport most heavily used by non-users are cars (34 per cent daily) and walking (52 per cent daily), with bus being the other most significant mode used (14 per cent at least weekly).

What are their attitudes towards rail?

As might be anticipated, those not using rail have a less positive view of the industry overall. Less than one fifth are positive towards rail, a similar proportion to those who are negative about the industry. Passengers, however, are more than three times more likely to hold a positive view rather than a negative one. The only other industry in our study of rail passengers showing a similar (although less marked pattern) is the airline industry, although positivity towards this is higher, and negativity lower, than for rail.

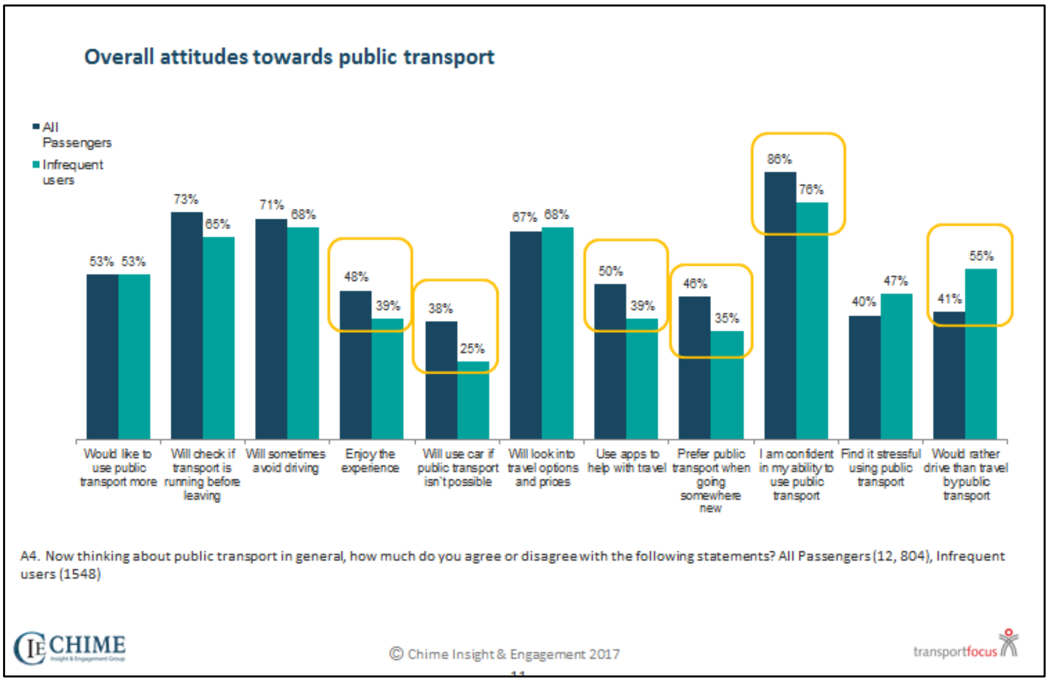


Trust in rail shows a similar pattern. Around one fifth of those not using rail say they trust train operators, compared with almost half of more regular rail passengers. However, there is a smaller gap in terms of distrust with 14 per cent of non-users saying they distrust rail companies compared with nine per cent of passengers.



There was no difference in trust scores between all passengers and infrequent users, suggesting that how recent the experience was – regardless of how frequently the train is used – may have an impact on the degree to which passengers feel trusting towards train companies.

There are some differences in attitudes towards public transport between passengers and infrequent users. While trust in rail is not necessarily affected by frequency of use, there is a relationship between using trains less and having less affinity with them as a mode of transport. Infrequent users have less confidence with travelling on public transport. Unlike passengers this group are less likely to choose public transport when travelling somewhere new and tend not to use apps to help with travel. Infrequent users find the experience of using public transport less enjoyable with just over half stating they would rather drive.

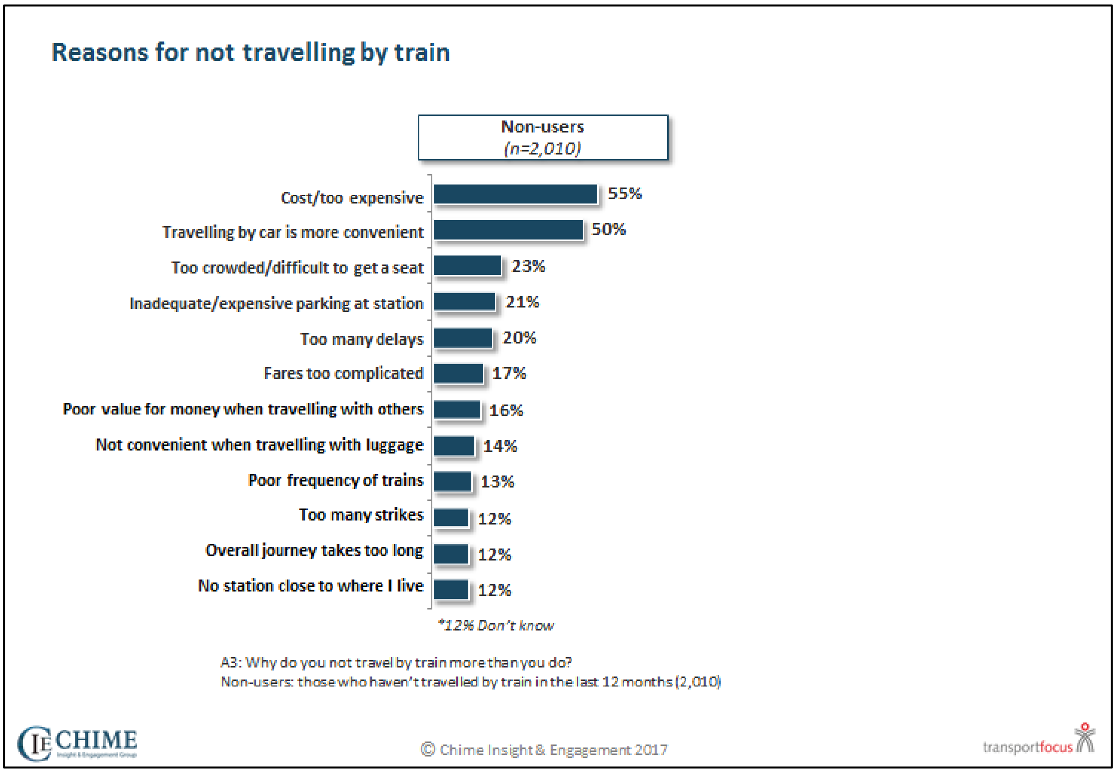


As might be anticipated, those not using rail are much more likely to have ambivalent feelings towards train companies. Almost two thirds of those passengers put themselves somewhere in the middle – their experiences and perceptions not being prevalent enough for them to form a strong opinion.

This suggests that, although there is clearly a small proportion of those not using rail who have negative views about the industry and rail companies, there is a large proportion who feel neutral, and equally a small group who have positivity towards the industry. Lack of use does not necessarily correlate with negativity. This report seeks to explore what potential exists to move non-users towards use, or more frequent use, of rail as a mode of transport.

What are the current barriers?

The primary reasons given for not using trains more often are related to cost and inconvenience.



For those with access to a car, this is clearly a key competitor for rail in terms of both overall convenience and also the barrier people feel is presented by station parking – either not enough space, or that it is too expensive.

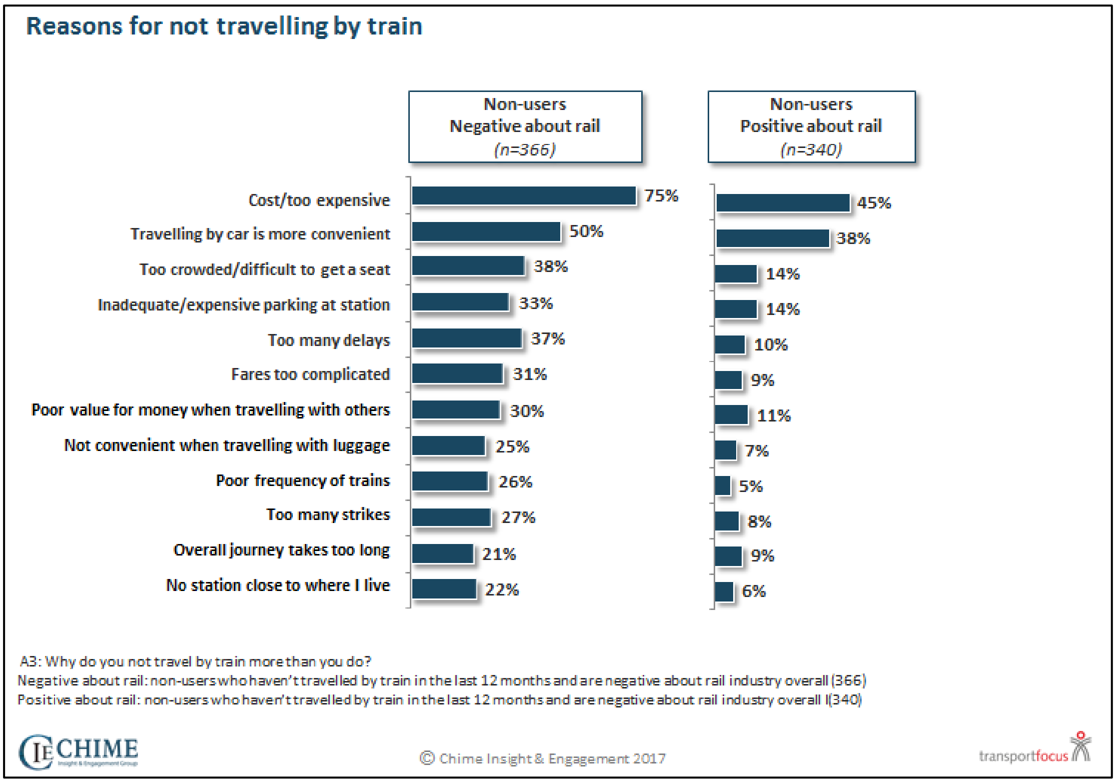
Cost is seen as the main barrier across the board, with no differences amongst the key demographic sub-groups. However, older customers and those not working are more likely to feel that the fares are too complicated. These groups would particularly benefit from fares simplification and effective communications about ticket types.

Older people, those living in village or isolated locations, and those with higher household incomes are more likely to state that travelling by car is more convenient than the train.

However, there are others who identify additional issues relating to convenience such as having a health condition or disability that makes it difficult (12 per cent), finding the bus or coach more convenient (11 per cent), or finding it inconvenient to travel by rail with children (six per cent).

Concerns relating to journey time or timetables were put forward by around one third of non-users as a reason for not using rail more frequently. This includes actual concerns about journey time, but also relates to how easy it is to travel to/from the station at either end of the journey. Those most likely to raise concerns on this are those who live in villages or isolated areas and those living further away from stations.

As might be anticipated, the degree to which barriers exist changes significantly when looking at those who are generally positive or negative about rail. Although all responses have much higher scores for those negative about rail, there is a particularly significant increase in those citing cost as a barrier, with 75 per cent of this group raising it as a concern.



Research conducted by Transport Focus and the Association of Train Operating Companies – now known as the Rail Delivery Group – in 2010[2] looking at the perceptions and realities of rail travel and how more people could be encouraged onto trains, also identified cost as a key barrier. However, when looking at the reasons and people used rail for their existing journey rather than their normal mode of transport, it was discovered in some

[2] https://www.transportfocus.org.uk/research-publications/publications/integrated-transport-perception-and-reality/

cases that rail was actually cheaper. It is therefore worth exploring how perceptions around cost might be challenged.

Potential improvements to drive increased use of rail

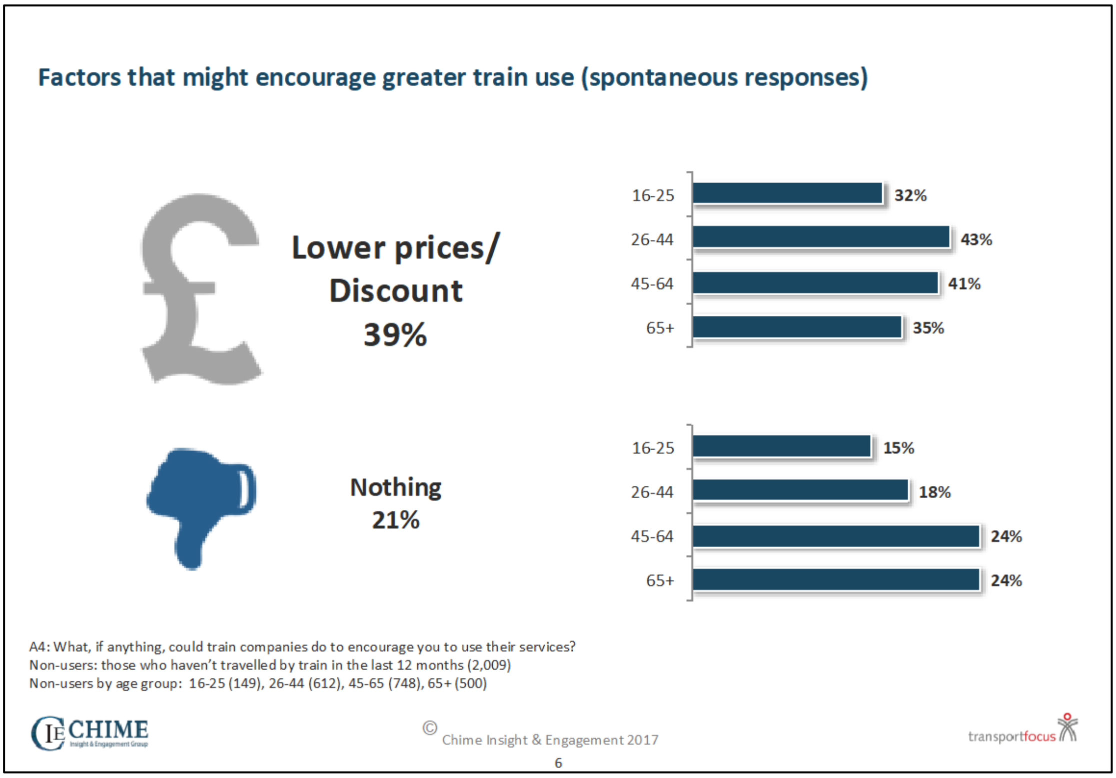
It is important to understand people's attitudes to rail and their reasons for not using trains. However, from a commercial perspective it is even more important to know what could make people use rail more.

We looked at non-users to see what might persuade them to give rail a go and at existing users to see what might persuade them to use rail more often.

Non-users

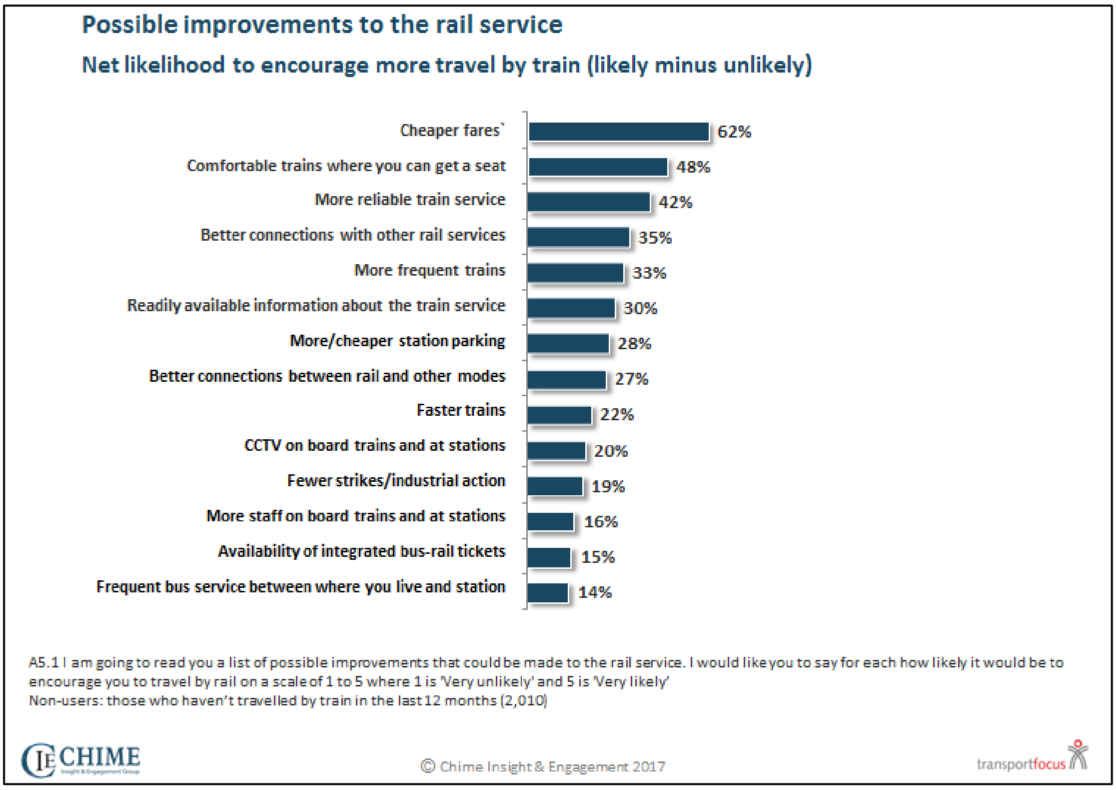
When asked what, if anything, train companies could do to increase non-users' rail travel, the main reply given was to lower prices. This was cited by 39 per cent of non-users, with a further 21 per cent saying that nothing could be done to encourage them to use train services more.

Older passengers were the most likely to say that they couldn't identify anything to make them use trains more often, with those in the middle age groups most likely to say that lower prices would make a difference.



Non-users were also presented with a number of potential improvements or changes that train companies could make and asked how likely each of these would be to increase their use of trains.

Unsurprisingly, given its predominance as both a barrier and a spontaneous improvement, cheaper fares were the area that non-users felt was most likely to impact their future take-up of rail services.



However, issues beyond cost also came to the fore when specific ideas were put to non-users. The comfort of the on-train experience as well as the reliability and connectivity of the train service overall were all identified as areas that could improve the overall service.

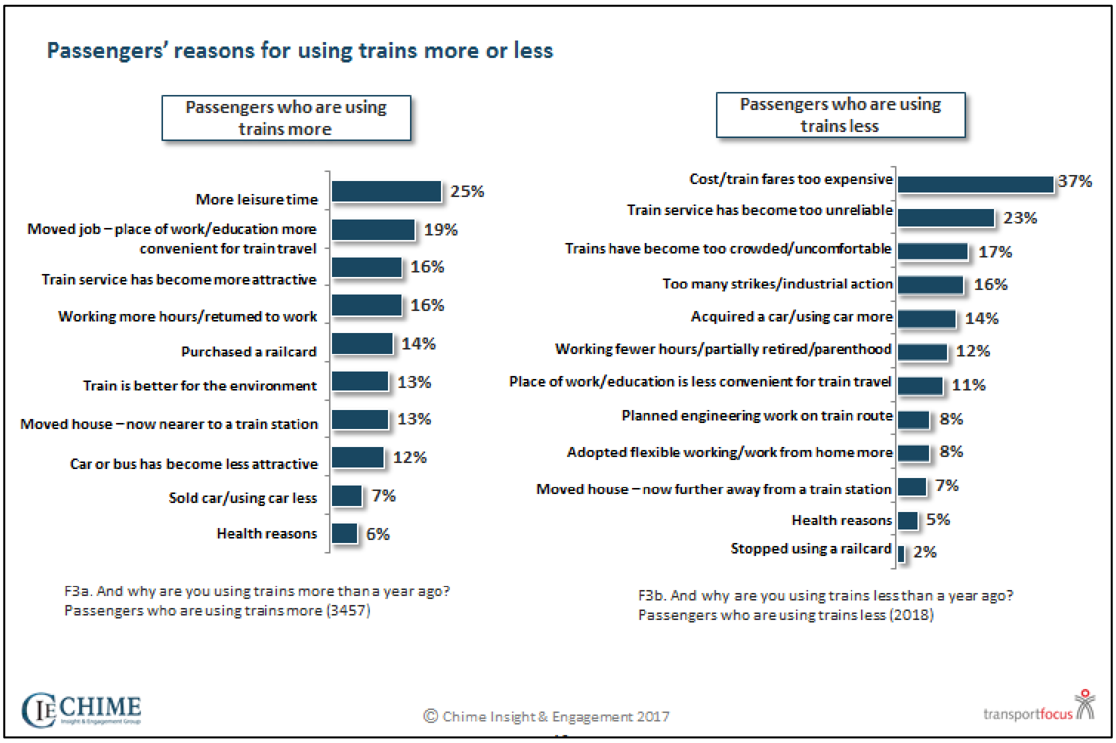
Those in education are a group that shows strong potential to be converted to train use (perhaps due to their likelihood to travel relatively locally at present but looking to a future in employment when train travel is more likely). This group were more likely than the average non-user to state that comfortable trains, more reliable and more frequent trains and better connections would encourage them to use trains more.

Non-users who live further away from stations, those who use a car daily and those travelling for business are more likely than average to be persuaded by more or cheaper station parking.

Existing passengers' reasons for using trains more or less

When existing passengers were asked why they were using trains more frequently, responses mostly related to a change of circumstances – either having more leisure time or a result of moving jobs. This further supports the point that those in education have strong potential to be converted to train use.

Lowering prices and improving the reliability and comfort of trains would not only have a positive effect on non-users' likelihood to use rail but it would also help to avoid losses with these areas being the main reasons why some passengers are using trains less.



"Be even remotely close to other [transport] in price and I'd use it much more."

"Drastically reduce fares."

Conclusions

Priority areas for improvement

This work was done as part of an overall project looking at priorities for improving rail services[3] and the levels of trust passengers have in train companies. In this we asked more than 12,800 passengers across the country to rank a series of possible improvements to their rail service in order of priority.

The key themes emerging as priorities overall for rail passengers are similar to those raised by non-users, namely:

1. better value for money
2. being able to get a seat on the train
3. more trains arriving on time
4. less-frequent unplanned disruptions
5. fewer trains cancelled.

What this suggests is that train companies can broaden the appeal for those currently not using their services by focusing on the improvements identified by their current passengers. However, it will be critical to communicate these improvements clearly, as without the benefit of experiencing any changes, non-users are unlikely to know that any concerns have been addressed.

"Have more carriages to ensure everyone gets a seat. During my last journey I was forced to stand and I felt so claustrophobic and anxious that I collapsed on the train."

"Lay on more trains at peak times with longer carriages."

Disabled passengers

These represent a higher proportion of non-users than they do of rail passengers overall and, as might be expected, their concerns are primarily around issues of accessibility. They are also more likely than others to be concerned about issues of personal safety – both onboard trains and at stations, as well as having a desire for more staff available to help.

[3] https://www.transportfocus.org.uk/research-publications/publications/rail-passengers-priorities-for-improvement/

Younger passengers and those in education

This is the group that is more likely to change behaviour in relation to train usage. They are more receptive to the improvement suggestions, and are least likely to state that 'nothing' would encourage them to use trains more. Barriers that are particularly relevant to them at present include areas relating to timetables and the frequency and reliability of service.

Frequent car users

This is a group where the car, and the convenience it provides, presents the strongest challenge to the take-up of train usage. There are three areas to think about here:

1. the availability and cost of station parking. This is an area that clearly needs to be addressed (or current perceptions challenged) in order to convince this audience that rail travel is a convenient option.
2. the perception that travelling door-to-door by car is easier/quicker/cheaper than using train for at least some of that journey.
3. the cost when travelling in a small group. Four people in a car can share petrol costs and reduce the cost per person. On rail the cost typically increases with each extra person travelling. The new Two Together railcard has helped address this but there is still scope to look at situations where groups of people are travelling together.

"Nothing. With my car I can go door to door cheaper than the train."

"Nothing, prefer the convenience of a car."

Older and retired passengers

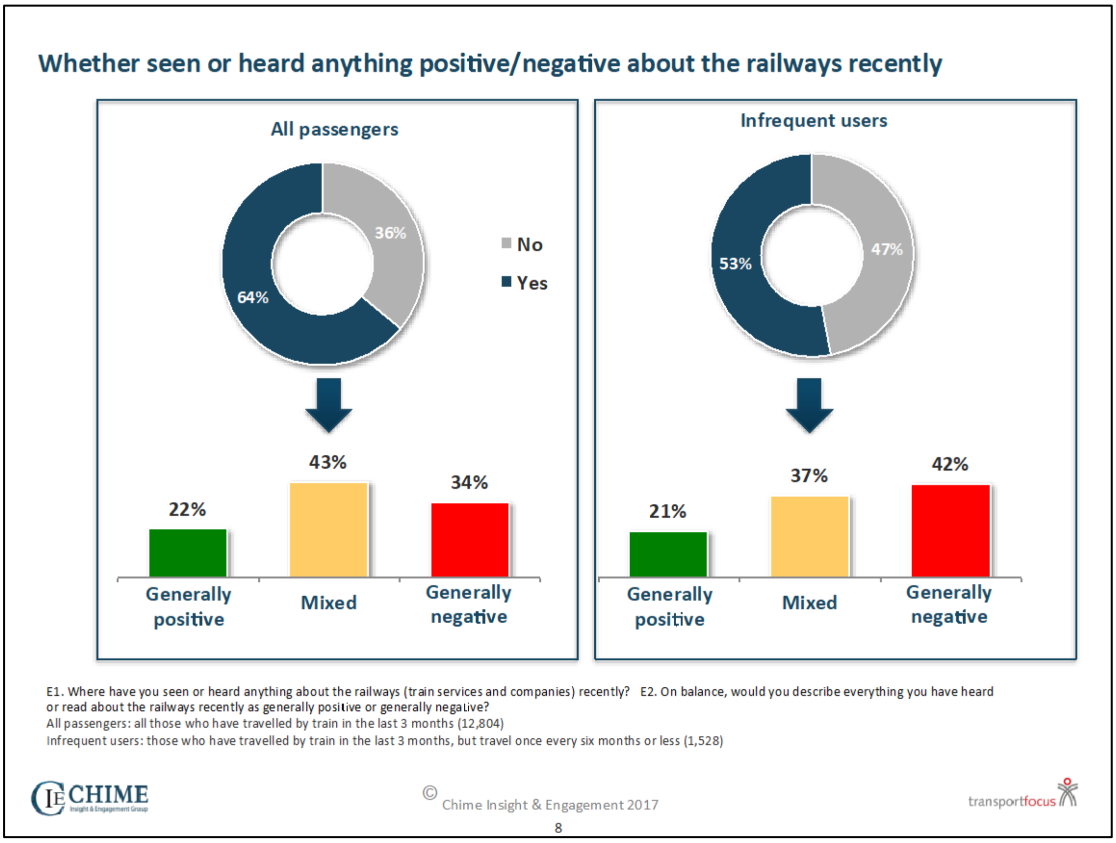
This is the group whose behaviour is likely to be most difficult to shift. As they themselves have said, they are now perhaps too stuck in their ways to start thinking about using trains. Many are frequent car users, live in villages and further away from train stations, and also have greater concern regarding mobility. One tangible issue to address is the perceived complexity of fares and ticketing, which is particularly seen as a concern by older passengers.

"Nothing – I'm too old to change."

"Offer free fares to pensioners the same as the buses!"

Improving communication

Infrequent users are less likely than passengers to have seen or heard anything about the railways recently and when they have heard something it is more likely to be negative. These views are often fed by media reports and by their friends and family recounting their own personal ‘journey from hell’.



There is an important job to be done in communicating positive stories to this audience. One of the potential ways of addressing is to offer free ‘taster’ journeys so that they can experience things first hand.

“Cheaper prices and easier to find the cheapest and see when they cannot be used, I don’t always know when is peak and what happens if I miss by booked train. Can I travel on another similar time train?”

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Transport Focus is the operating name of the Passengers' Council