

# Rail Passengers' Priorities for Improvement 2020

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MAY 2020

**Populus**

# Contents

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# Background, objectives and passenger profile

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# Programme overview

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## Approach

The overall unweighted reporting sample is based on 14,389 people in Great Britain who have travelled by train in the last three months.

Note, a post field data editing stage removed 626 questionnaires containing incomplete or suspect data from an original unweighted sample of 15,015.

Fieldwork was conducted between the 11<sup>th</sup> - 26<sup>th</sup> March 2020.



## Sampling

A Populus Omnibus survey was carried out to understand the nationally representative demographic profile of those who have travelled by train in the last three months, and therefore establish interlocked age and gender quotas to set for the main study. Quotas were also set on social grade (ABC1 vs. C2DE).

Quotas were set on the majority of interviews, and then opened up to facilitate a boost of 500 interviews from lower incidence TOCs.



## Weighting

A very minor weighting was applied to ensure the interlocked age and gender profiles, plus social grade, for the main sample and boost matched the required quotas.

Upon completion of fieldwork, it was determined that the fall-out of main journey purpose and TOC was statistically similar enough to the results of the Omnibus to not require any weighting to be applied.



## MaxDiff Analysis

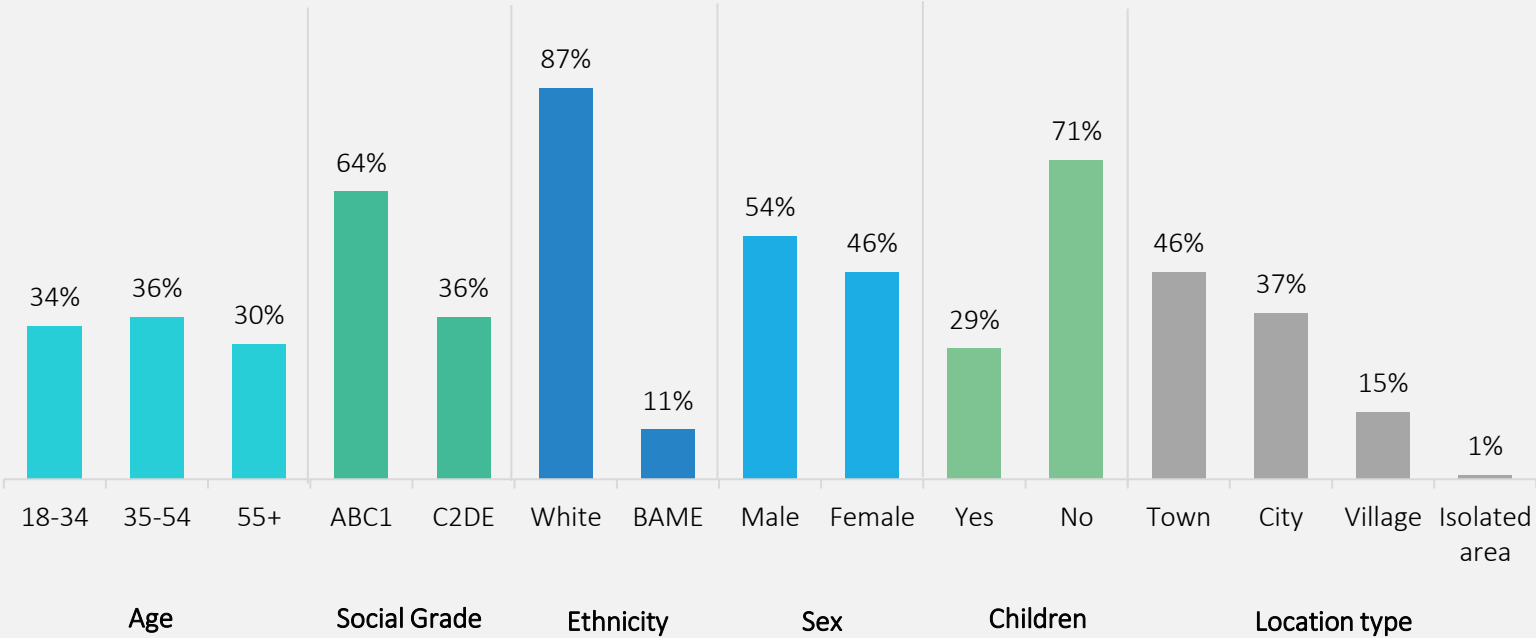
A MaxDiff analysis was carried out to establish a ranking of passengers' improvements priorities.

This was done by generating an index score for each improvement, based on how often respondents said it was the most or least important priority relative to other improvements they were shown.

This fed into a TURF Analysis to understand the optimal combination of improvements to positively impact passenger experience.

# Passenger profile – key demographics

Region <i>(Home address)</i>	% of sample
London	22%
South East	16%
North West	11%
East of England	6%
South West	6%
West Midlands	9%
Scotland	8%
Yorkshire and the Humber	8%
East Midlands	6%
Wales	4%
North East	4%



# While a majority of passengers travel most commonly for leisure, commuters are far more frequent travellers

Journey purpose

Main journey purpose

67%

Leisure

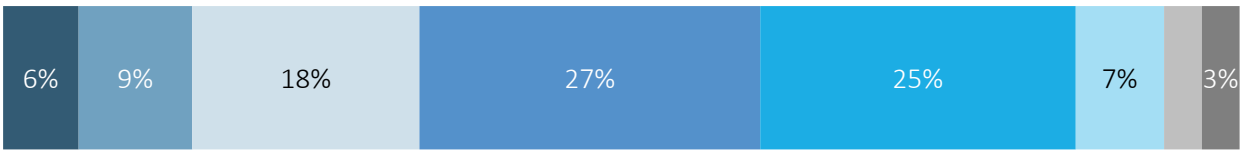
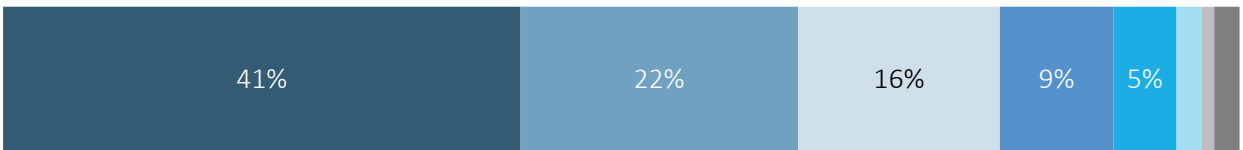
24%

Commuter

9%

Business

Frequency of travel















- 5 or more times a week
- 3 or 4 times a week
- 1 or 2 times a week
- 1 or 2 times a month
- Once every 2-3 months
- Once every 6 months
- Once a year
- Less often

N.B. Data labels not present indicate results of 2% or lower

# Interviews were captured across 28 key TOCs across England, Scotland and Wales

TOCs by total  
Number and % of interviews

	London and South East
	256 (2%)
	380 (3%)
	218 (2%)
	1444 (10%)
	722 (5%)
	454 (3%)
	599 (5%)
	1288 (9%)
	1178 (9%)
	1075 (8%)
	418 (3%)
	808 (6%)



Long Distance
957 (7%)
992 (7%)
832 (6%)
659 (4%)
786 (5%)
4 (less than 1%)



Airport
65 (less than 1%)
144 (2%)
123 (1%)



Regional
587 (4%)
353 (2%)
1917 (13%)
1168 (8%)
639 (5%)



Open Access
70 (less than 1%)
111 (1%)

N.B. As respondents were able to select multiple TOCs, % figures total more than 100

# Summary and recommendations

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## Summary – key improvement priorities for passengers

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1

**Ticket price value for money and the service reliability/punctuality are the top improvement priorities for rail passengers**

These are the key priorities across all TOCs, nations and different passenger groups, and are likely intertwined in the minds of passengers.

In the absence of actually reducing fares, look to enhance their perceived value by addressing and improving other areas important to passengers, such as seating availability, frequency of services and accurate and timely information about delays.

2

**Regarding reliability, the prompt arrival of trains is considered most important**

Nearly half of the wider passenger population say this is their first priority for improvement, followed by fewer train cancellations and less frequent unplanned disruptions. This is consistent across key sub-groups.

3

**Overall priorities for improvement remain largely consistent with 2017**

While still important, reducing engineering disruption is perceived as less important in 2017, potentially down to greater familiarity or acceptance amongst passengers and more impactful awareness campaigns that have been put in place. The latter should remain integral to minimising the impact of disruption for passengers.

Train Wi-Fi has also fallen in importance, potentially due to improvements in Wi-Fi capabilities on trains, as well as increased mobile data and hot-spotting capabilities.

## Summary – key improvement priorities for core passenger sub-sets

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4

### Commuters are more concerned than other passengers about train frequency, disruption, compensation and journey times

Efforts should be made to minimise the impact of disruptive engineering works during peak travel hours, to reduce the impact on commuters, who we know from engineering works research are much more likely to expect compensation.

Business passengers would be more receptive to improvements around mobile phone signal and Wi-Fi than other passenger groups.

5

### Reduced journey times would be most welcomed by students and full-time workers

Key priorities are consistent across working status sub-groups; however students and those working full-time feel more strongly about journey times being reduced.

Making rail travel more environmentally friendly (included only in 2020) is not considered a top priority, although is perceived to be more important amongst students and younger passengers.

6

### Well-maintained toilet facilities are a key priority for those with a disability

This is ranked within the top ten priorities for the wider passenger population. However for most disabled passengers, improvement of toilet facilities is in the top five priorities, suggesting that this should be an integral part of any future improvement strategy targeted at this specific group of passengers.

Improving the availability of step-free access, especially for those with mobility issues, enhancing staff presence and improving the clarity of station/train announcements would also improve the experience of disabled passengers.

## Summary – key improvement passengers by region

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### While reliability and value for money remain key, other top priorities differ in rank for different nations/regions

Less disruption over engineering works is a consistent theme across those living in the South of England, including London.

Passengers in Scotland place more importance on the cleanliness of toilet facilities on trains, as well as the trains and stations themselves.

Value for money of train tickets is a particularly strong concern for passengers living in Wales compared to the wider GB passenger population.

8

### On-train experience and disruption are key priorities on some Network Rail routes

Key priorities are largely consistent with the wider passenger population, especially for Eastern and Northwest and Central routes.

However, passengers in Scotland and on the Wales and Western route more often mention the on-train experience (e.g. toilets, cleanliness) as a priority, whereas delays and disruption are particularly pressing for Southern passengers.

9

### A wide range of different improvements are desired across Regional Administrations

Additionally, Transport for London's overall ranking is different to the remainder of regional administrations, with less engineering disruption and frequency of trains a significant area of priority for these passengers.

Value for money is especially pressing for those covered by Nexus and the South Yorkshire Passenger Transport Executive.

Another common theme is improved personal security, particularly for those covered by Merseytravel, and Transport for West Midlands.

## Summary – key improvements at stations, and for non-rail users

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### When it comes to station improvements, toilet facilities are the most pressing

Station improvements are consistent across different journey purpose sub-groups, however commuters are significantly more likely to think improvements are necessary for a wide range of different elements, free Wi-Fi in particular.

Improvements around step-free access, station seating and shelter are more likely to be seen as a priority for those with disabilities.

Priorities are relatively similar across Great Britain, with improvements around cashpoints and drink/snack outlets significantly more likely to be seen as a priority in Wales.

11

### For non-rail users, cost and convenience are the key barriers

Crowding, poor reliability and inadequate/expensive car parking facilities are the next most commonly cited barriers to using trains more often, among those who last did so more than a year ago.

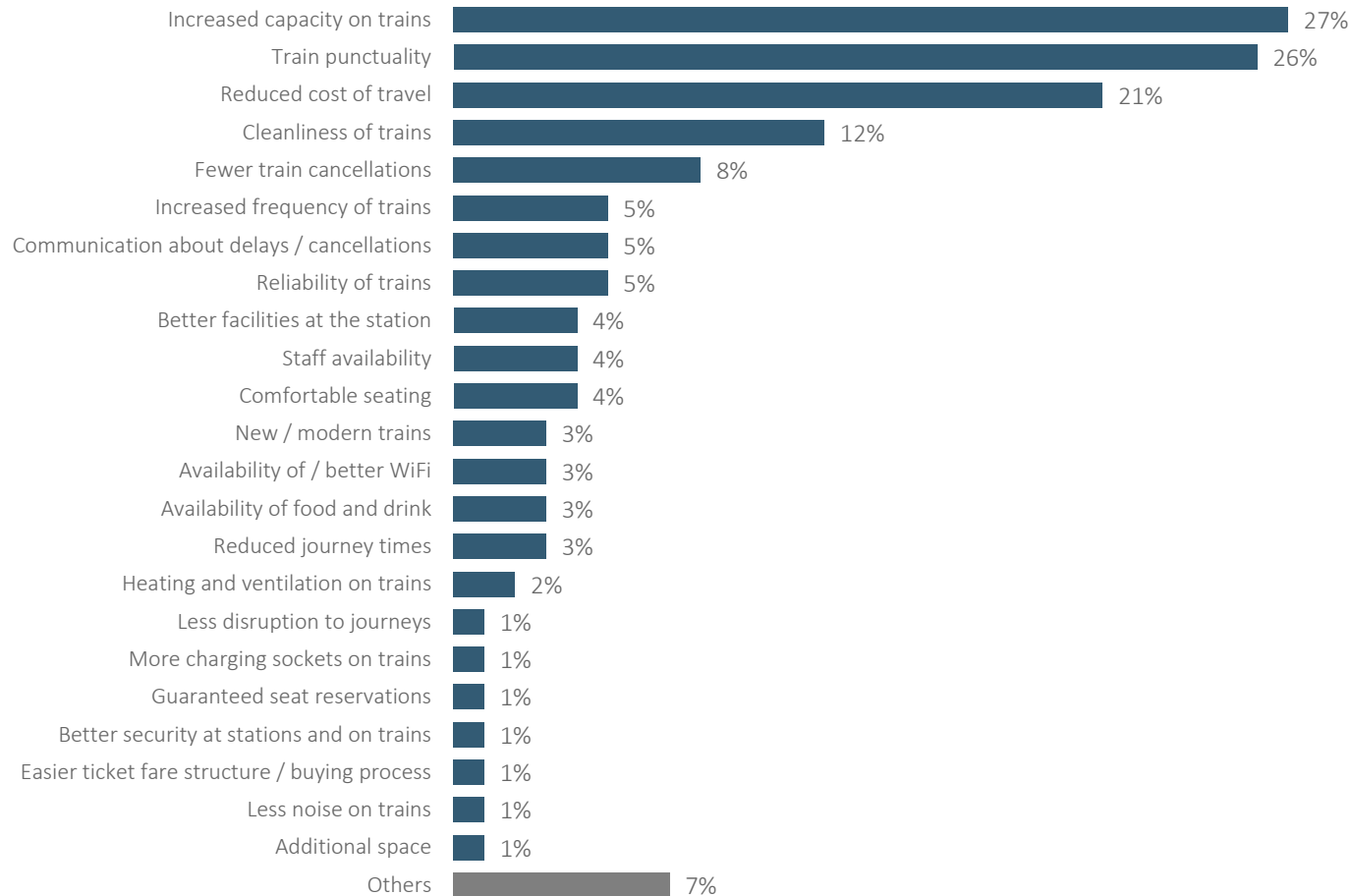
In line with those actually using the rail network, improvements around seating, accessibility and availability of staff to help on trains and at stations are key for those non-users with disabilities.

# Spontaneous suggestions for improvement

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# Spontaneous priorities suggest train capacity, punctuality and cost of rail travel are the most pressing areas for improvement

Spontaneous improvement priorities by **total**  
% of mentions by passengers



# Spontaneous suggestions mention train capacity as an issue even with seat reservations - and that the cost of rail travel is assessed against punctuality and cost of other forms of transport

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## Increased capacity on trains (27%)

"Cater for the sheer number of passengers - it's been clear for years that the number of passengers at peak times far exceeds the capacity of available seating, and yet every day people are still being packed on to trains like sardines."

*Commuter*

"Matching capacity to passenger numbers. My experience is that trains are overcrowded with aisles full of standing passengers. It is not unusual on some services for passengers to be unable to board the train because carriages are full."

*Business*

"Having a maximum capacity on carriages. If you pre-book a seat you expect to be able to get to that seat. Quite often it's impossible to even attempt to get your seat and if you do you are often subject to abuse from other passengers."

*Leisure*

## Train punctuality (26%)

"Could be running the trains on time, and not cluster them all around the same time."

*Commuter*

"They need to start being punctual and have back-up plans in event of failures. There are far too many delays."

*Business*

"Punctual services (are the) most important. I want to be confident I can get to my destination reliably."

*Leisure*

## Reduced cost of travel (21%)

"If the service is going to consistently be late and cancelled or use an alternative route then the price should be cheaper, or for the price it should be a better more consistent service. I have been travelling on the route for years and have seen the price over double and the service hasn't tangibly improved."

*Commuter*

"Cheaper fares on certain routes. Cheaper parking. In short, I would use trains more if it was cheaper. Especially when living in rural communities; it can be expensive to even to get to the station. And then when you add the cost of the train... it mounts up quickly."

*Business*

"Put the prices down. The main problem in the UK is the train prices are flying high e.g. Manchester Piccadilly to London Euston costs £90 one way – it's cheaper to get a flight for that price."

*Leisure*

# Prompted rail priorities [using MaxDiff]

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# The 2020 survey includes 30 features in total, with new statements for reliability and sustainability

## Differences between features included in 2017 and 2020

### Reliability features

In 2017, reliability was measured through the inclusion of three separate statements in the list of improvements shown to passengers during the MaxDiff exercise.

However, this made it difficult to gain an understanding of where reliability as an overarching measure featured in the overall rank of passengers' priorities. Therefore, this year's exercise offered passengers one overall feature to measure reliability (*'reliability and punctuality'*).

Separate questions were included elsewhere in the questionnaire to understand passenger perceptions on specific elements of reliability.

### Sustainability features

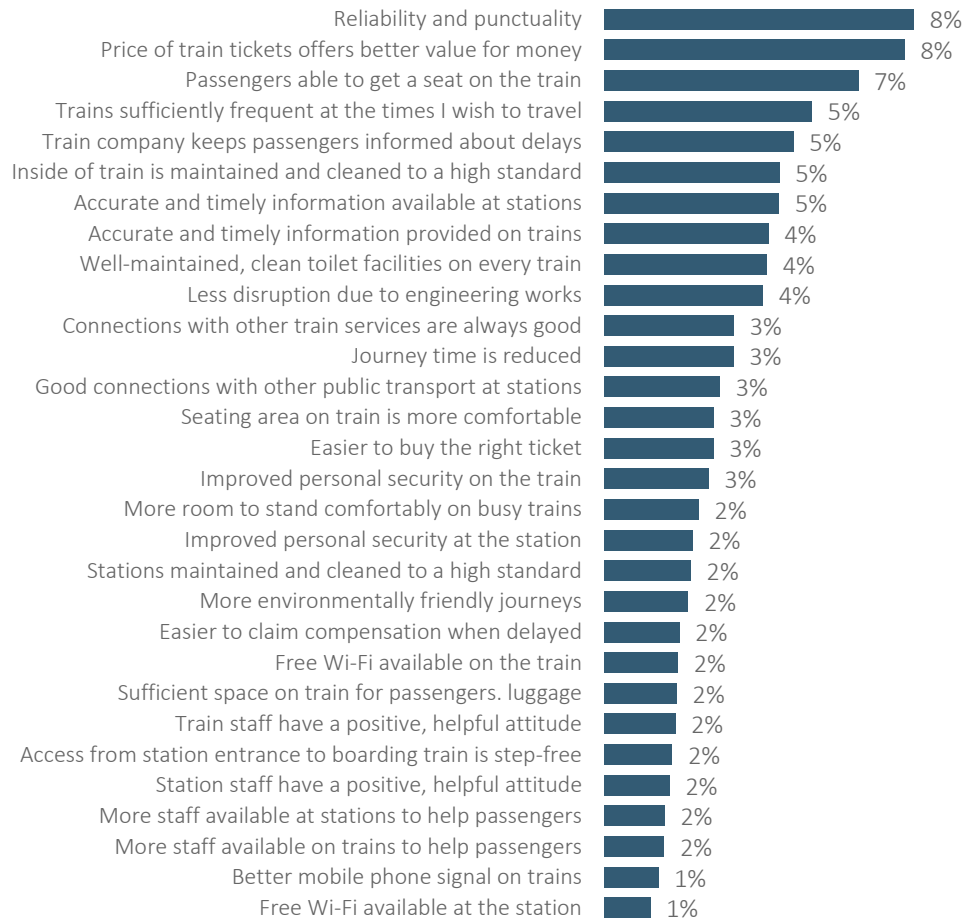
A new statement was included (*'more environmentally friendly journeys'*) to understand passengers' perception of environmentally friendly journeys as a priority for improvement.

Added in 2020  
Removed in 2020

Features included in 2020 survey	Features included in 2017 survey
Access from station entrance to boarding train is step-free	Access from station entrance to boarding train is step-free
Accurate and timely information available at stations	Accurate and timely information available at stations
Accurate and timely information provided on trains	Accurate and timely information provided on trains
Better mobile phone signal on trains	Better mobile phone signal on trains
Connections with other train services are always good	Connections with other train services are always good
Easier to buy the right ticket	Easier to buy the right ticket
Easier to claim compensation when delayed	Easier to claim compensation when delayed
Free Wi-Fi available at the station	Fewer trains cancelled than happens now
Free Wi-Fi available on the train	Free Wi-Fi available at the station
Good connections with other public transport at stations	Free Wi-Fi available on the train
Improved personal security at the station	Good connections with other public transport at stations
Improved personal security on the train	Improved personal security at the station
Inside of train is maintained and cleaned to a high standard	Improved personal security on the train
Journey time is reduced	Inside of train is maintained and cleaned to a high standard
Less disruption due to engineering works	Journey time is reduced
More environmentally friendly journeys	Less disruption due to engineering works
More room to stand comfortably on busy trains	Less frequent major unplanned disruptions to your journey
More staff available at stations to help passengers	More room to stand comfortably on busy trains
More staff available on trains to help passengers	More staff available at stations to help passengers
Passengers able to get a seat on the train	More staff available on trains to help passengers
Price of train tickets offers better value for money	More trains arrive on time than happens now
Reliability and punctuality	Passengers able to get a seat on the train
Seating area on train is more comfortable	Price of train tickets offers better value for money
Station staff have a positive, helpful attitude	Seating area on train is more comfortable
Stations maintained and cleaned to a high standard	Station staff have a positive, helpful attitude
Sufficient space on train for passengers' luggage	Stations maintained and cleaned to a high standard
Train company keeps passengers informed about delays	Sufficient space on train for passengers' luggage
Train staff have a positive, helpful attitude	Train company keeps passengers informed about delays
Trains sufficiently frequent at the times I wish to travel	Train staff have a positive, helpful attitude
Well-maintained, clean toilet facilities on every train	Trains sufficiently frequent at the times I wish to travel
	Well-maintained, clean toilet facilities on every train

# While reliability/punctuality and value for money have the largest preference share, a range of improvements would be welcomed

Improvement priorities by **total**  
Share of preference



## The MaxDiff can be interpreted in a number of ways

### Share of preference

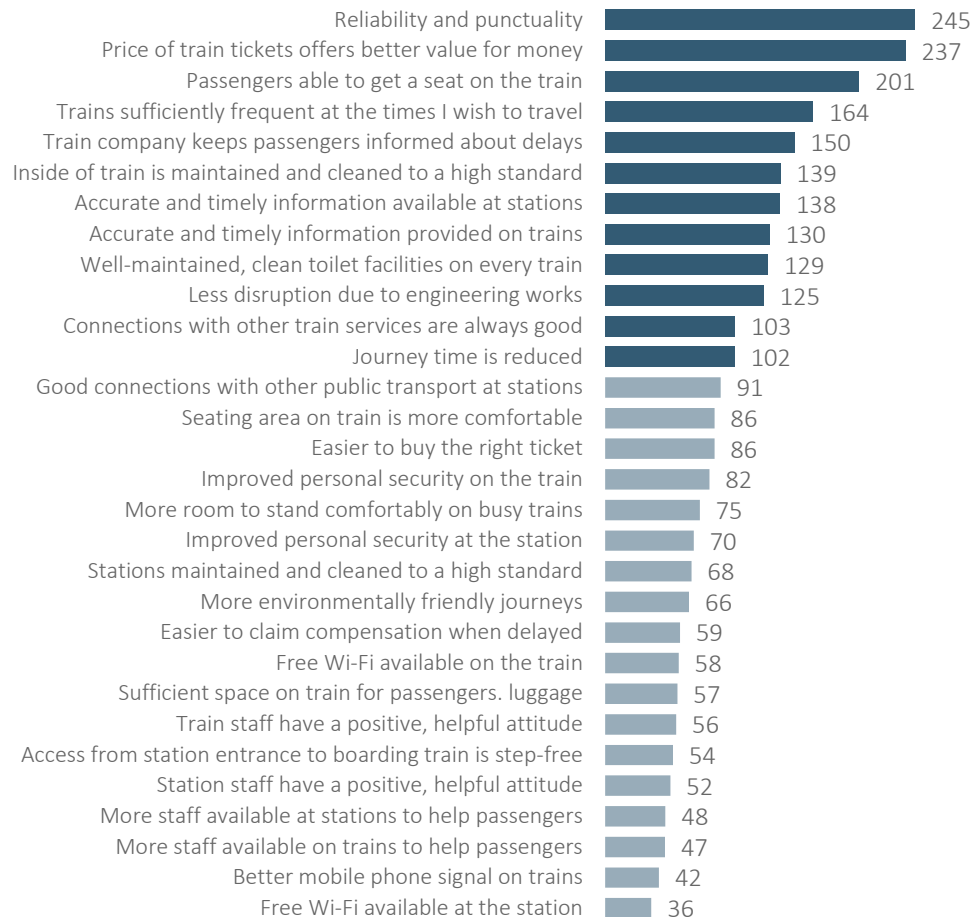
One way to interpret the findings is by understanding the share of preference for each feature relative to all other features.

Here we can see the preference share attributed to each priority area according to its performance in the MaxDiff priority exercise.

In this year's study, respondents most often chose *'reliability and punctuality'*, *'price of train tickets offers better value for money'* (both 8%), and *'passengers are able to get a seat on the train'* (7%) as their priorities for improvement.

# The priorities index shows there are 12 main areas of improvement according to passengers

Improvement priorities by **total**  
Index scores



## The MaxDiff can be interpreted in a number of ways

### Index scores

Another way to interpret the findings is by showing the whole list of priorities as an indexed averaged on 100.

This means that any feature with a score of 100 has an average score. The number of points above 100 indicates the ratio of preference share to this average score.

This would mean that any feature with a score of 50 has half as much importance as average, and a feature with a score of 150 has 50% more importance than on average.

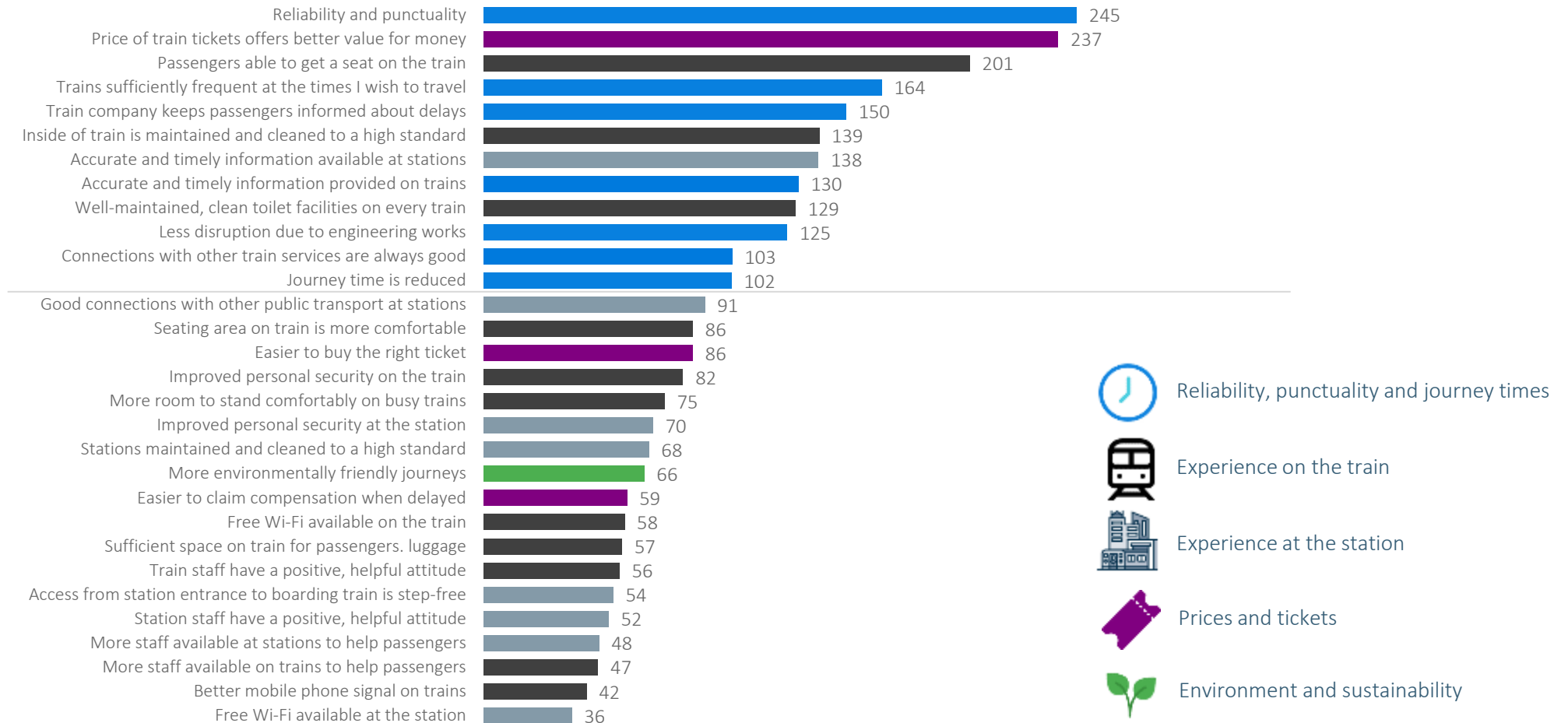
Using 100 as the average, we can see that there are 12 key areas for improvement here. These remain consistent whether viewed through index scores or share of preference.

However, in the slides that follow, we will continue to use index scores to explore passenger priorities.

# The main priorities for passengers group around improving reliability, value for money and the experience on board the train. Sustainability and station improvements rank lower down the list

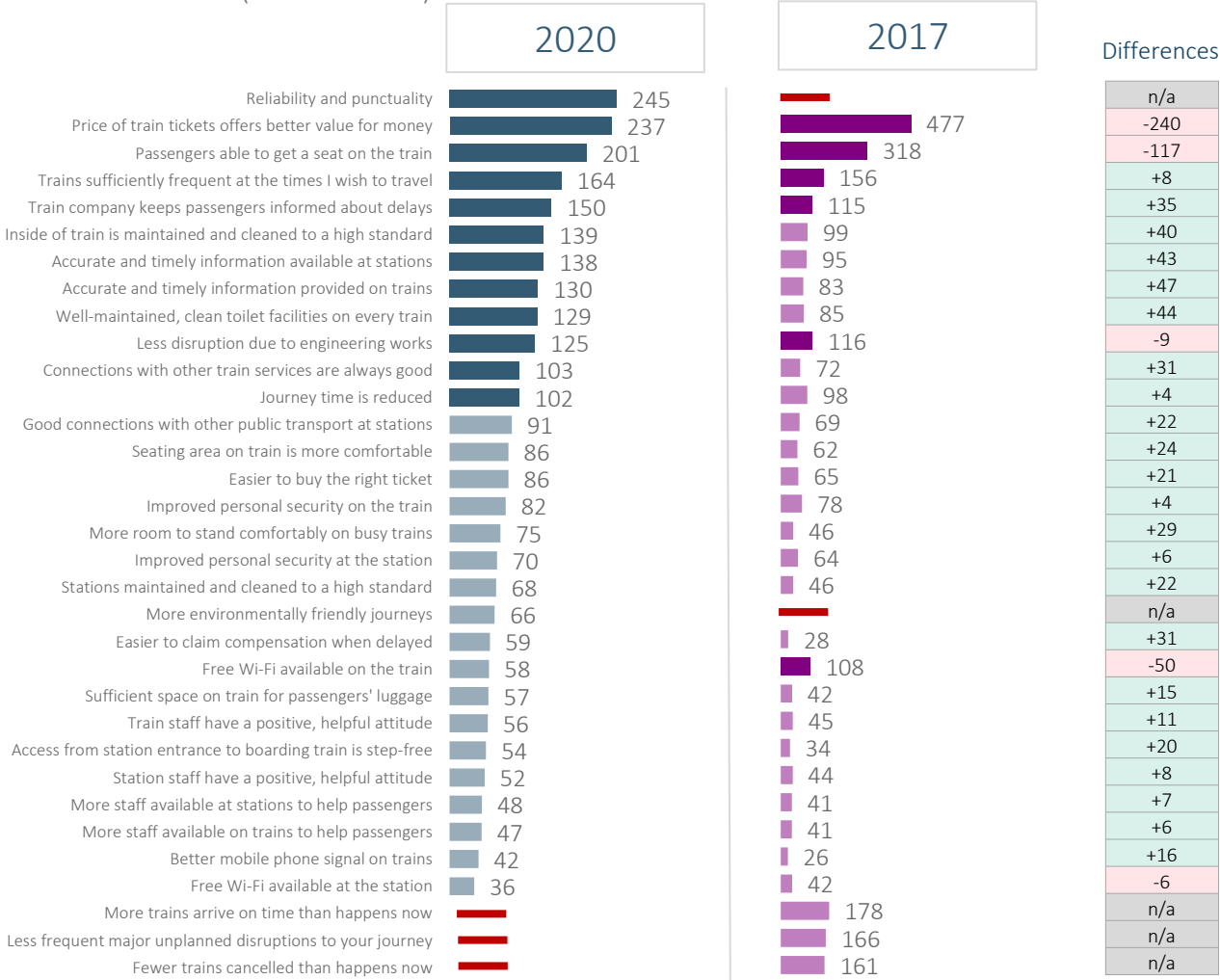
## Improvement priorities by total (categorised)

Index scores



Barring the addition of the new reliability statement, the overall ranking of features remains largely consistent with 2017

Improvement priorities by total  
Index scores (2020 vs. 2017)



Barring the top few priorities, scores are generally higher than in 2017

As MaxDiff is a trade-off exercise, the difference in scores is in part down to the removal of the three individual reliability statements - which in 2017 made up the 3<sup>rd</sup>, 4<sup>th</sup> and 5<sup>th</sup> most important priorities – and the inclusion of one over-arching reliability statement, which sits top in 2020\*.

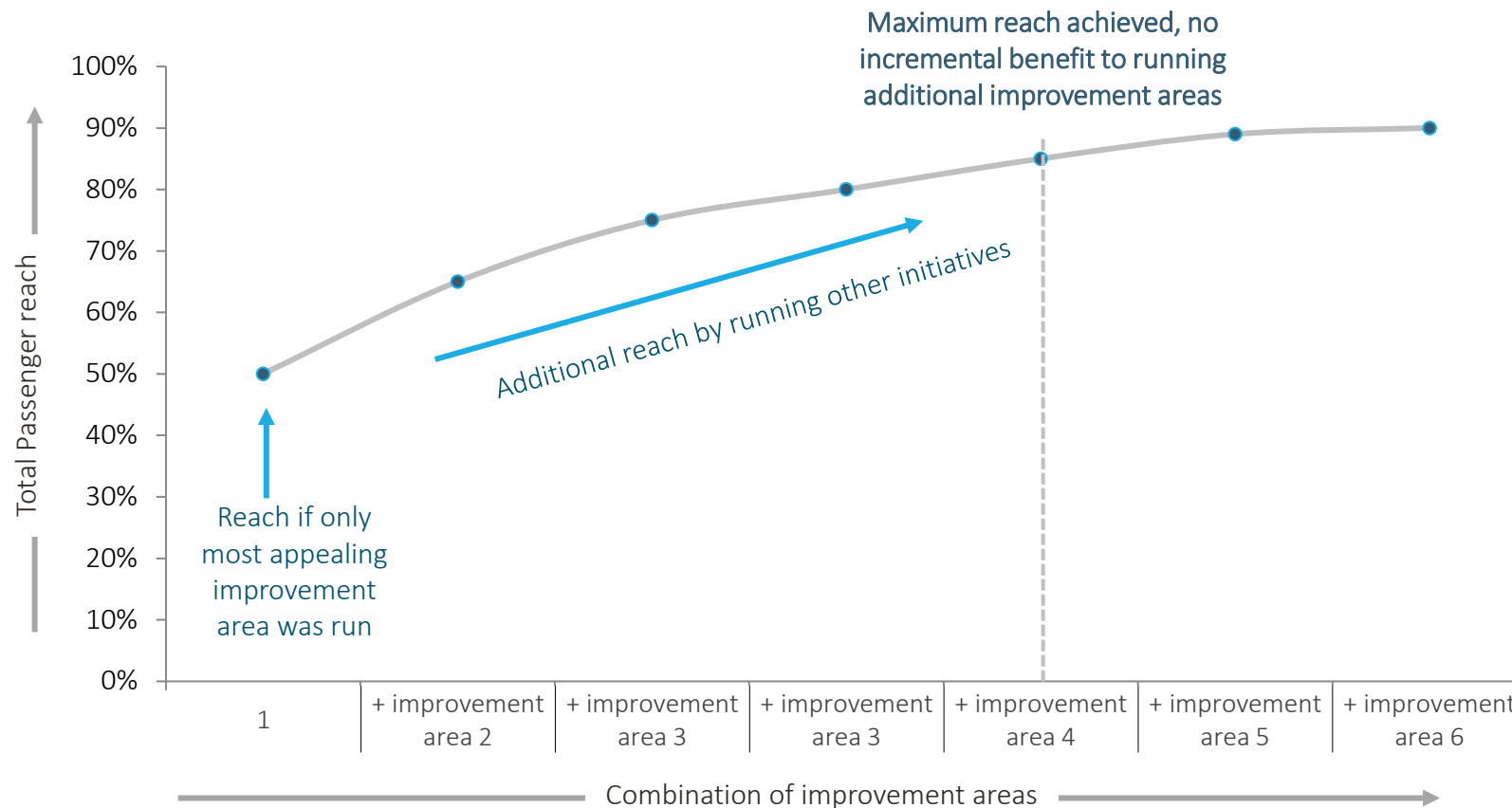
Free Wi-Fi on trains is much less of a priority for improvement in 2020

This is likely down to increased Wi-Fi provision. Passengers of certain TOCs – such as Heathrow Express and Avanti West Coast – find on-train Wi-Fi more important.

# Identifying the optimal combination of improvements areas - TURF analysis explained

TURF analysis identifies the most appealing areas for improvement and then the incremental benefit of adding additional appealing improvements. This means we can understand:

1. which combination of initiatives will appeal to the most people
2. the optimal number of improvement area to proceed with reach the maximum number of people



While numerous improvement areas were found appealing, undertaking them all is not cost-efficient nor required to satisfy the public.

In reality only one or two improvements are needed to reach most people with an appealing improvement – undertaking a few more improvement areas can then broaden the reach to more niche audiences.

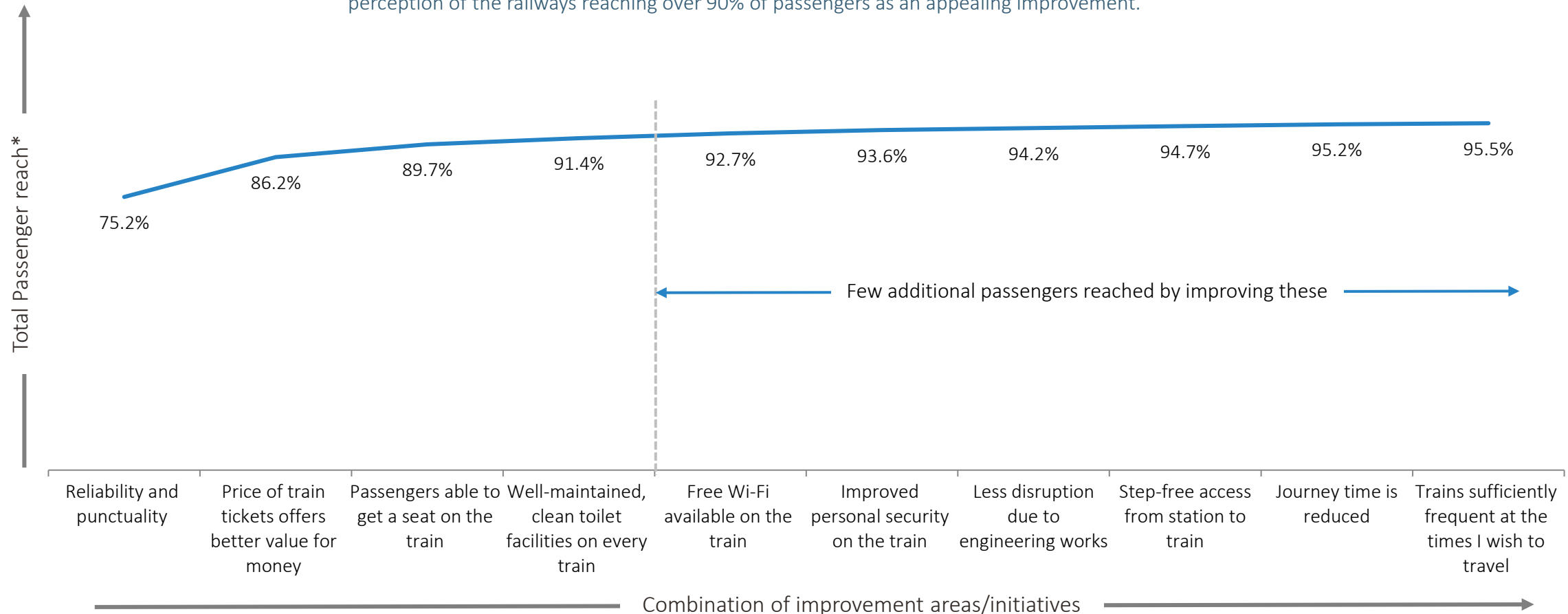
However once maximum reach or plateau is reached, there is no longer an incremental benefit to running more improvements.

The next few slide will explore the optimal combination of initiatives required.

# A combination of improving reliability/punctuality, value for money, seating availability and maintaining toilets reaches over 90% of passengers who consider one of these as an appealing improvement area

TURF analysis by total

Reliability/punctuality, value for money, improved seating capacity and maintaining toilets are the key improvements that have the biggest combined reach of improvement areas that appeal to passengers. Ultimately, improving these areas will have the biggest impact on passengers' perception of the railways reaching over 90% of passengers as an appealing improvement.



\*breadth of audience reach based on appeal of improvement area. 100% reach = combination appeals to everyone. All passengers (14,389)

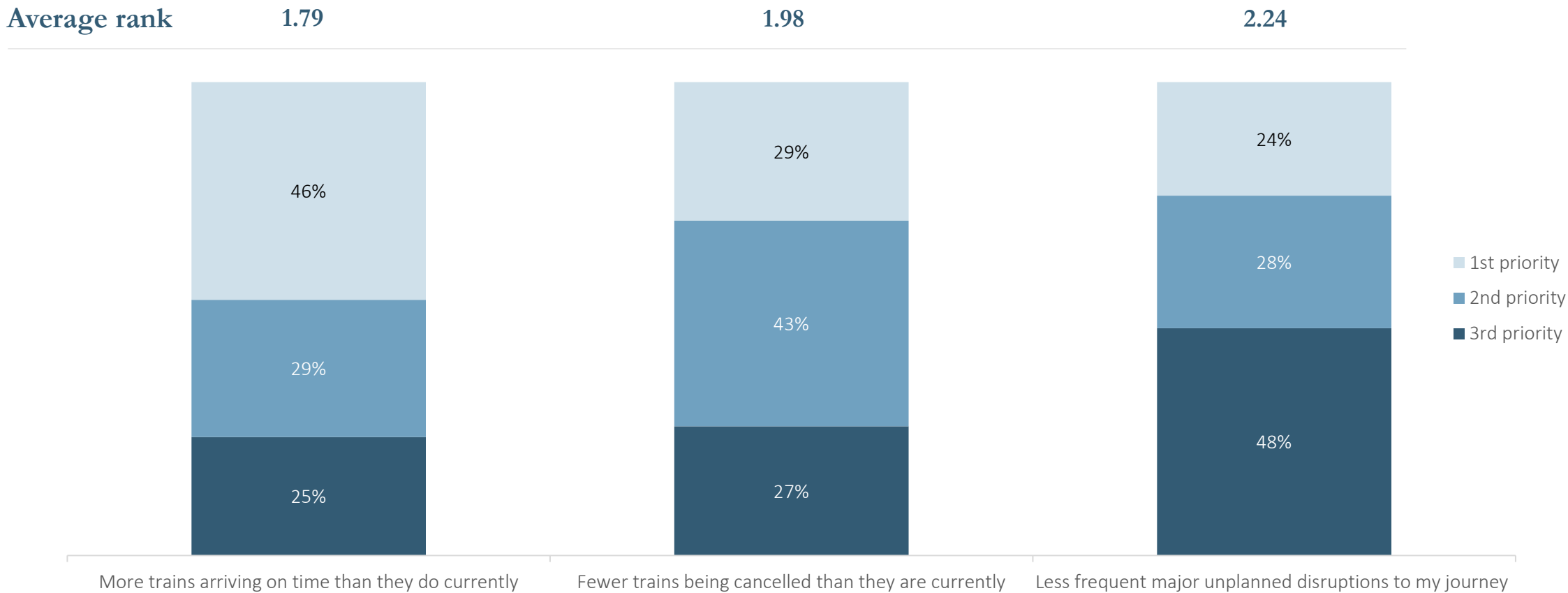
# Importance of reliability factors

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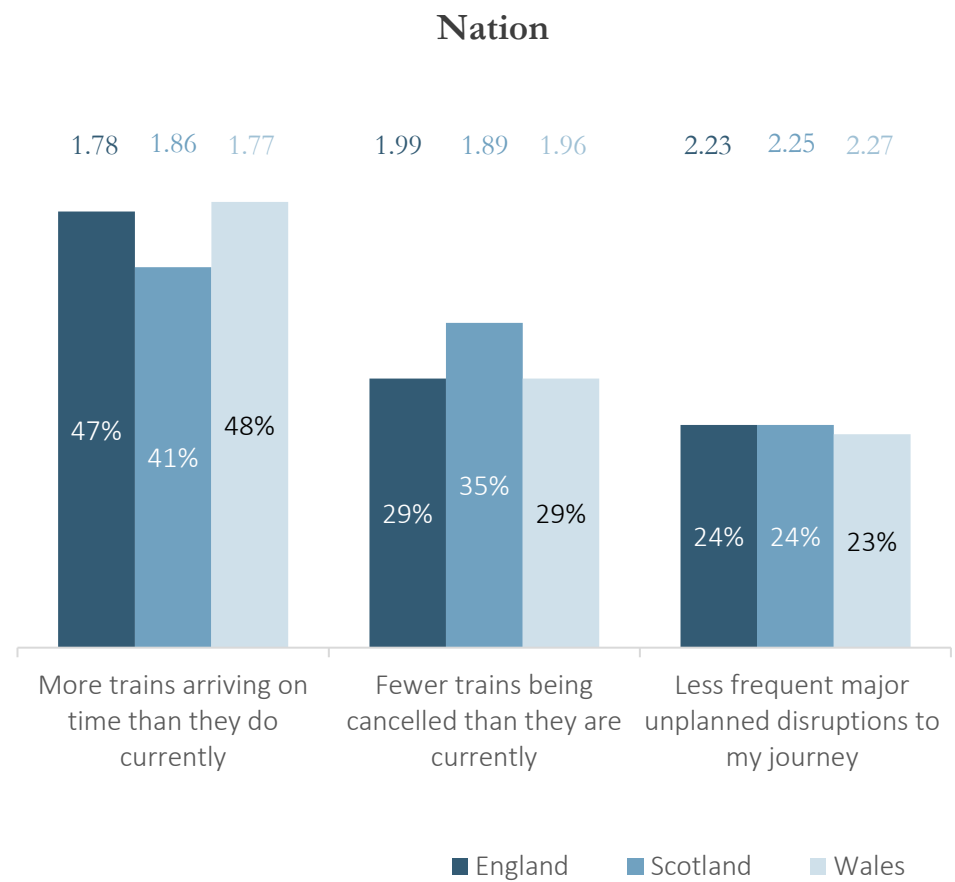
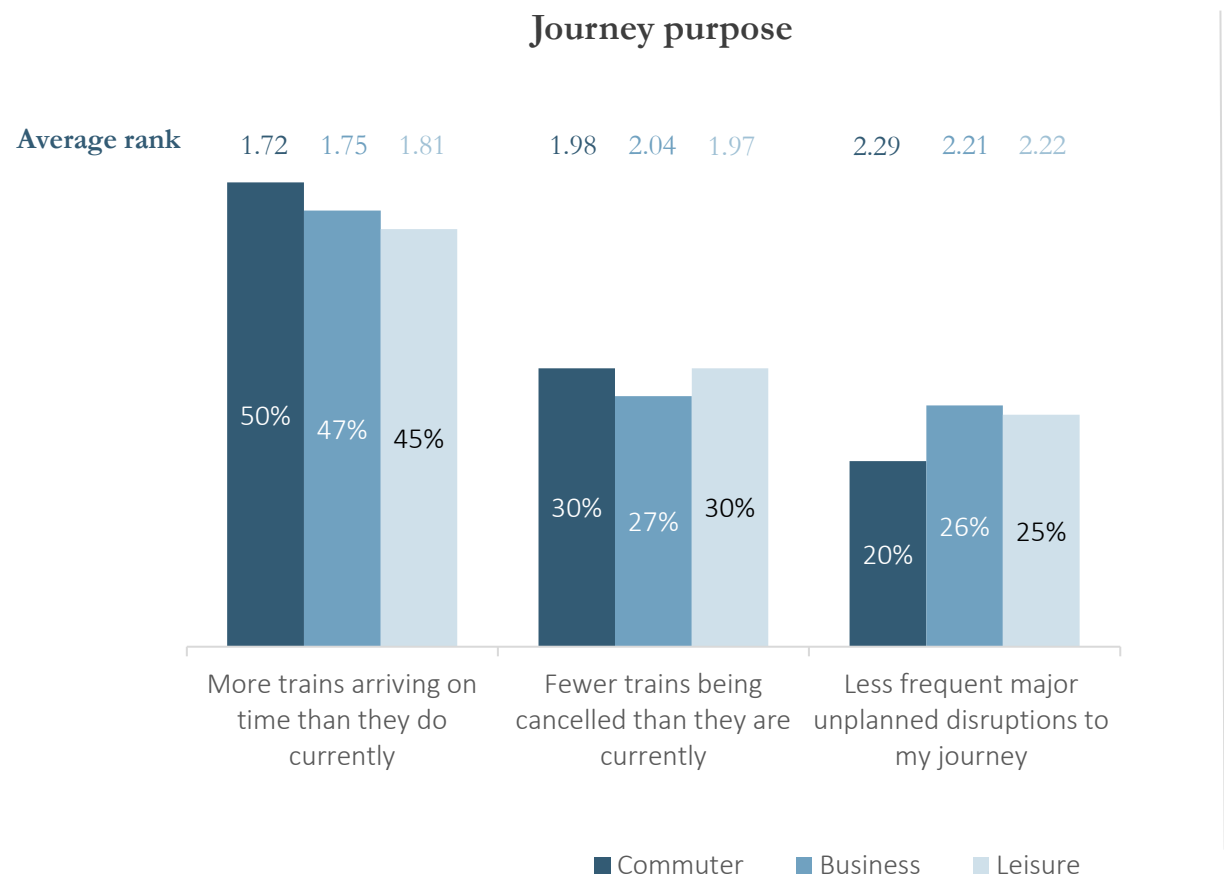
# Regarding reliability, passengers are most concerned about trains arriving on time, followed by fewer trains being cancelled than they are currently

Reliability of train services by total  
% ranking each statement as 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> priority



# The prompt arrival of trains remains the first priority regardless of the type of journey passengers make most often, or the country they live in

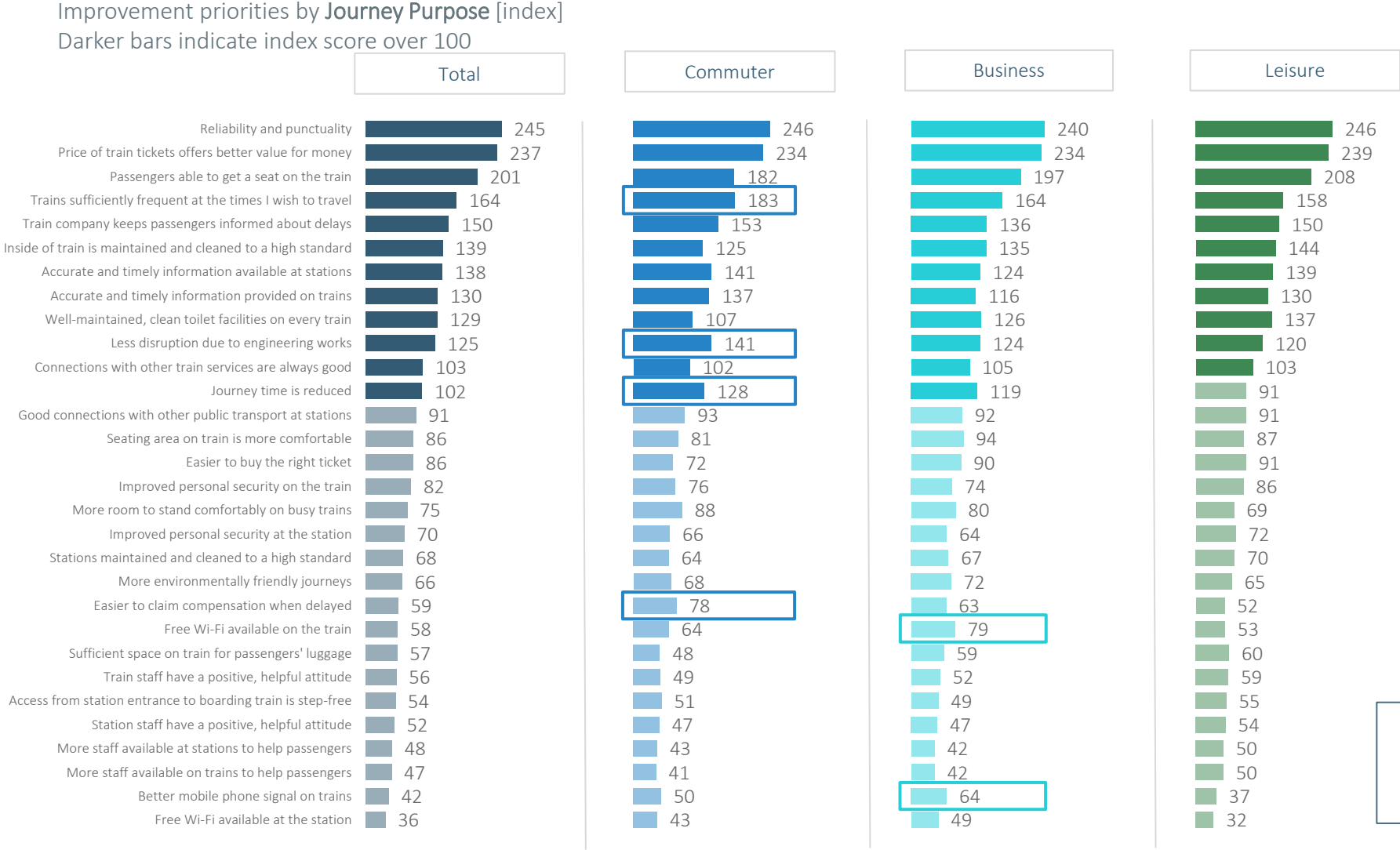
Reliability of train services by **journey purpose** and **country**  
% that said each statement is their first priority



# Priorities by key sub-groups

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While reliability and ticket prices are key improvement areas for all groups regardless of journey purpose, commuters are more concerned about frequency, disruption, journey times and compensation

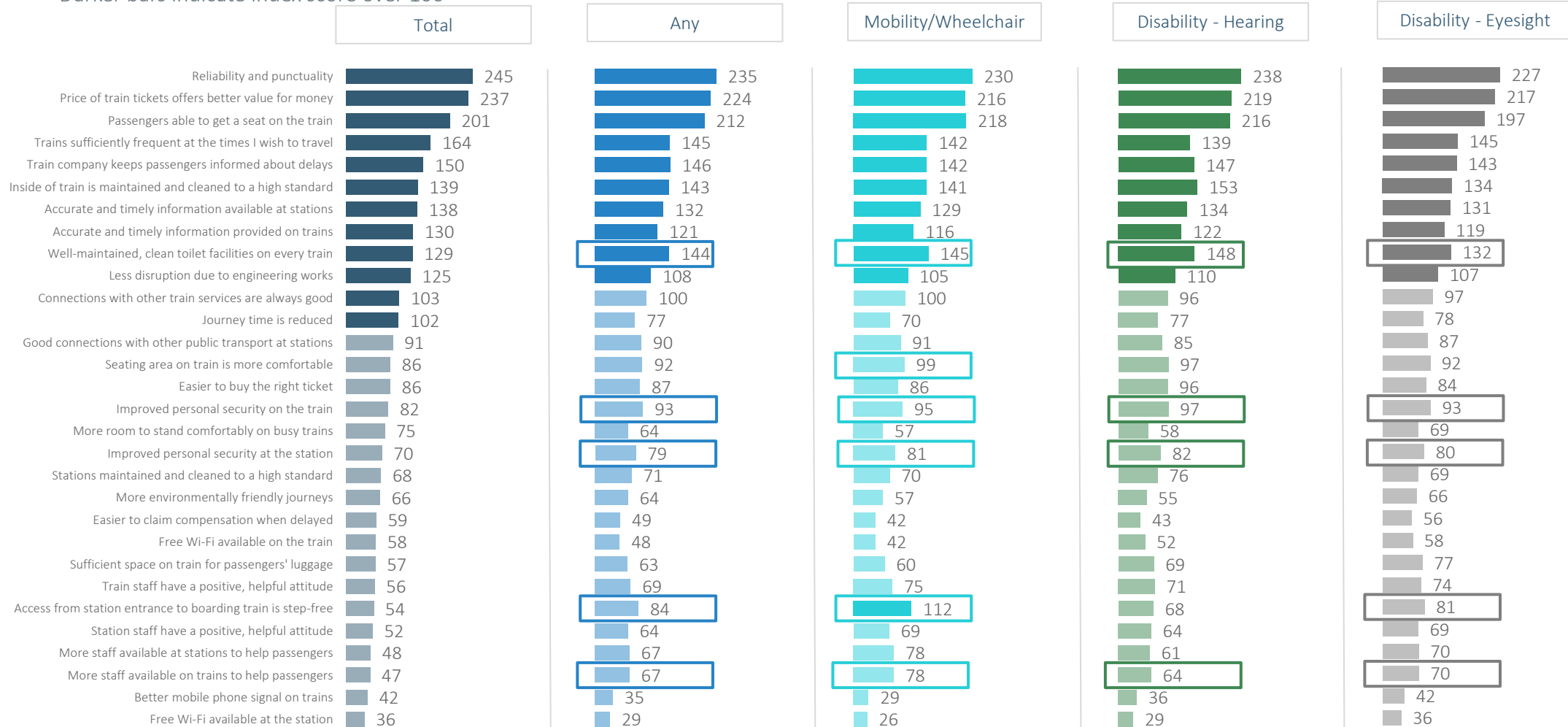


Significance testing is not available for MaxDiff data. Therefore, data callouts on this and the following charts are based on observations of interest and do not have a statistical basis for selection.

# While key rail priorities remain the same, for passengers with a disability, toilet facilities, step-free access, improved security and staff availability to help passengers are more important

Improvement priorities by Disability [index]

Darker bars indicate index score over 100



# While disabled passengers face many of the same challenges as the wider population, toilets, step-free access and clarity of announcements are more pronounced

How to help manage the impact of disabilities while travelling  
*Spontaneous comments among all with a disability*

As with the wider passenger population, reliability/punctuality are key for disabled passengers. Problems in this area are accentuated if there is insufficient support from staff...

*"The real problem arises in a cancellation with no available assistance visible in the station. It can be difficult moving on from the situation in which the arrangements you've made no longer apply and you don't know how to make the new way ahead."*

*Mobility disability*

Step-free access at stations and seating are unsurprisingly big concerns for passengers with mobility challenges...

*"I struggle to climb stairs and would welcome step-free access at all stations. Improve seating on all trains to support a passenger's spine to prevent back problems."*

*Mobility and eyesight disability*

Toilet cleanliness and maintenance are of greater importance amongst disabled passengers...

*"Because of my ulcerative colitis, I need to be sure there will be access to a toilet. Often these days, they are out of order or in such a disgusting state you do not want to use them. Also some trains do not have toilets at all."*

*Other disability*

The clarity of station/train announcements is a particular challenges faced by those with a hearing disability...

*"The sound systems at stations is variable - at Motherwell it is excellent. however at most other stations it is hard to hear what the announcer is saying. On trains it is virtually impossible to make out what is being announced. A visual display with the information would be very useful on trains, especially when announcing delays or non-standard issues."*

*Hearing disability*

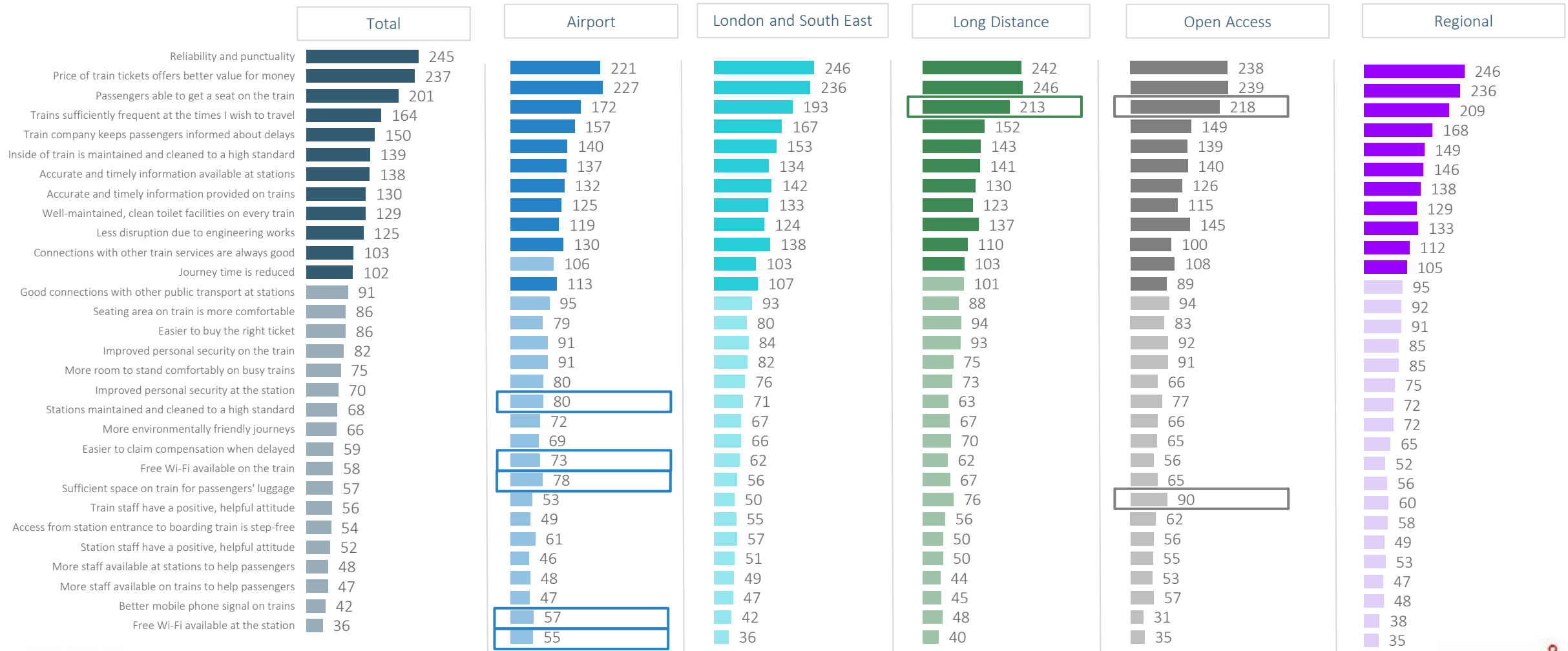
# Priorities by TOC

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# Key priorities are largely consistent across TOC types bar Airport TOCs, where a range of lower ranked priorities are considered more important compared to the wider passenger population. Getting a seat is particularly important for long distance and Open Access journeys

Improvement priorities by TOC type (index)

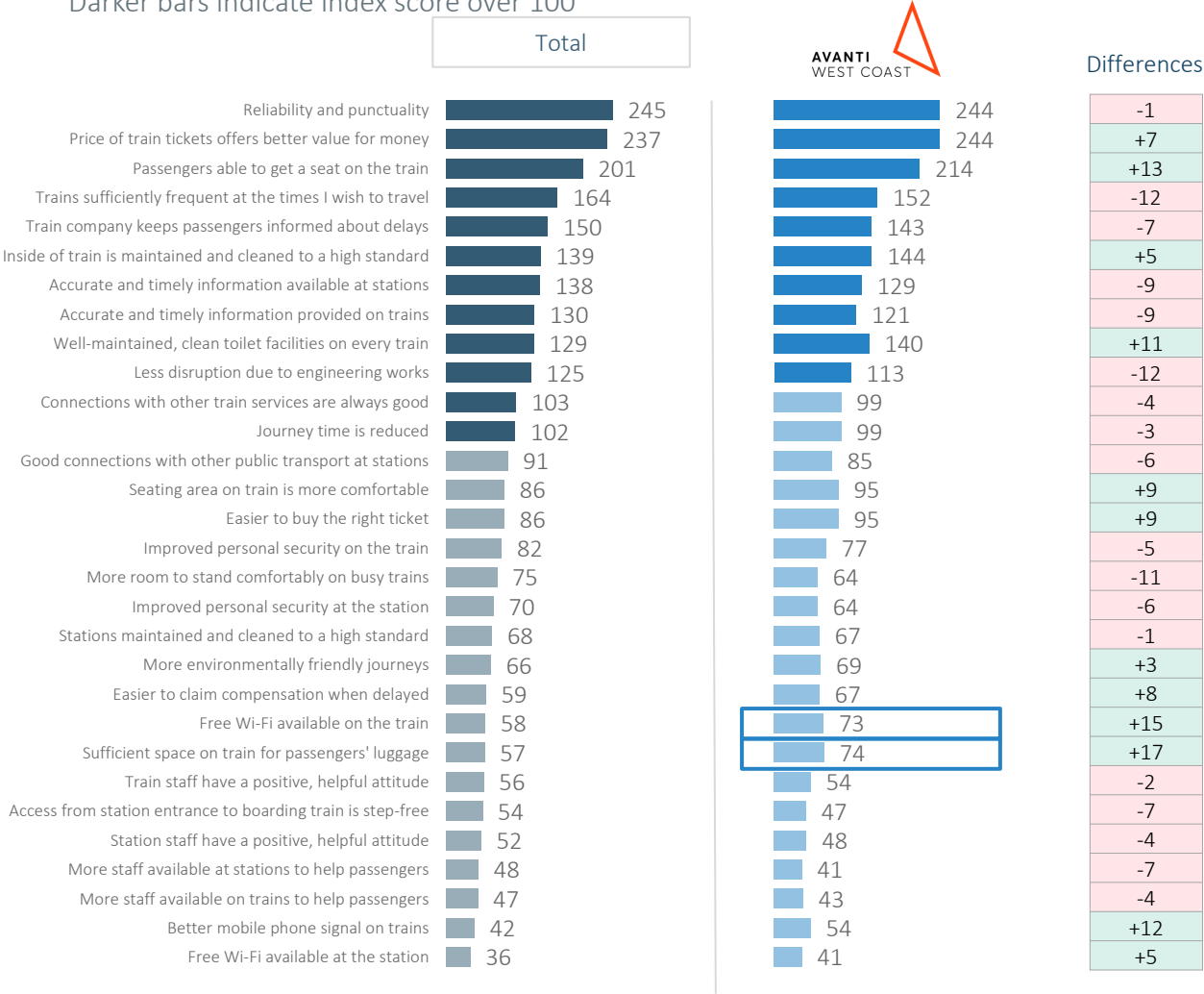
Darker bars indicate index score over 100





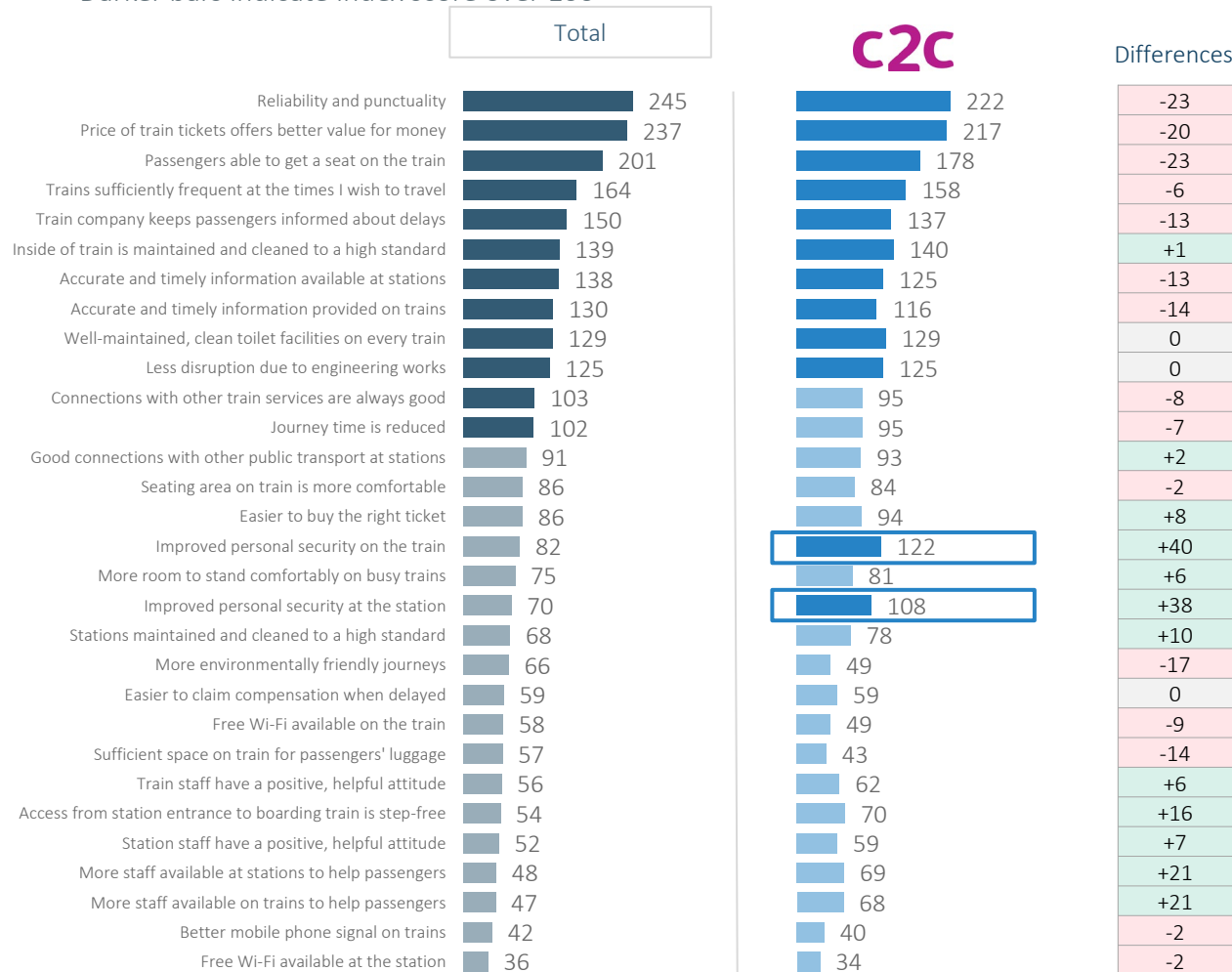
While key priorities are largely the same as the wider passenger population, **Avanti West Coast** passengers over index on their desire for improvements around Wi-Fi and luggage space

Improvement priorities by Avanti West Coast passengers [index]  
Darker bars indicate index score over 100



# The top three key priorities are less of a priority for **c2c** passengers than for the wider passenger population. Personal security at stations and trains however, are key concerns

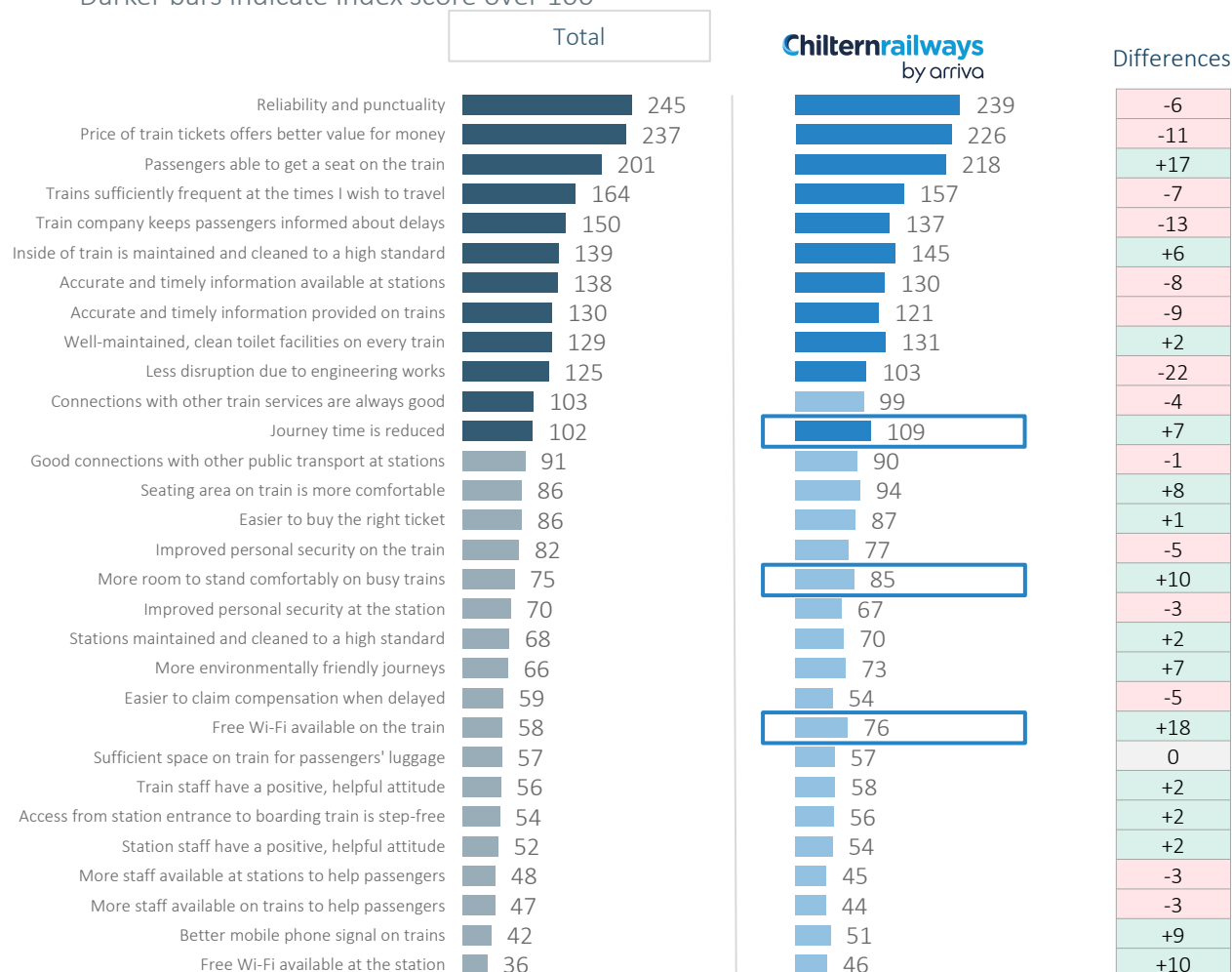
Improvement priorities by **c2c** passengers [index]  
Darker bars indicate index score over 100



# Chiltern Railways passengers in particular would welcome reduced journey times, free Wi-Fi and more space to stand comfortably on busy trains

Improvement priorities by Chiltern Railways passengers [index]

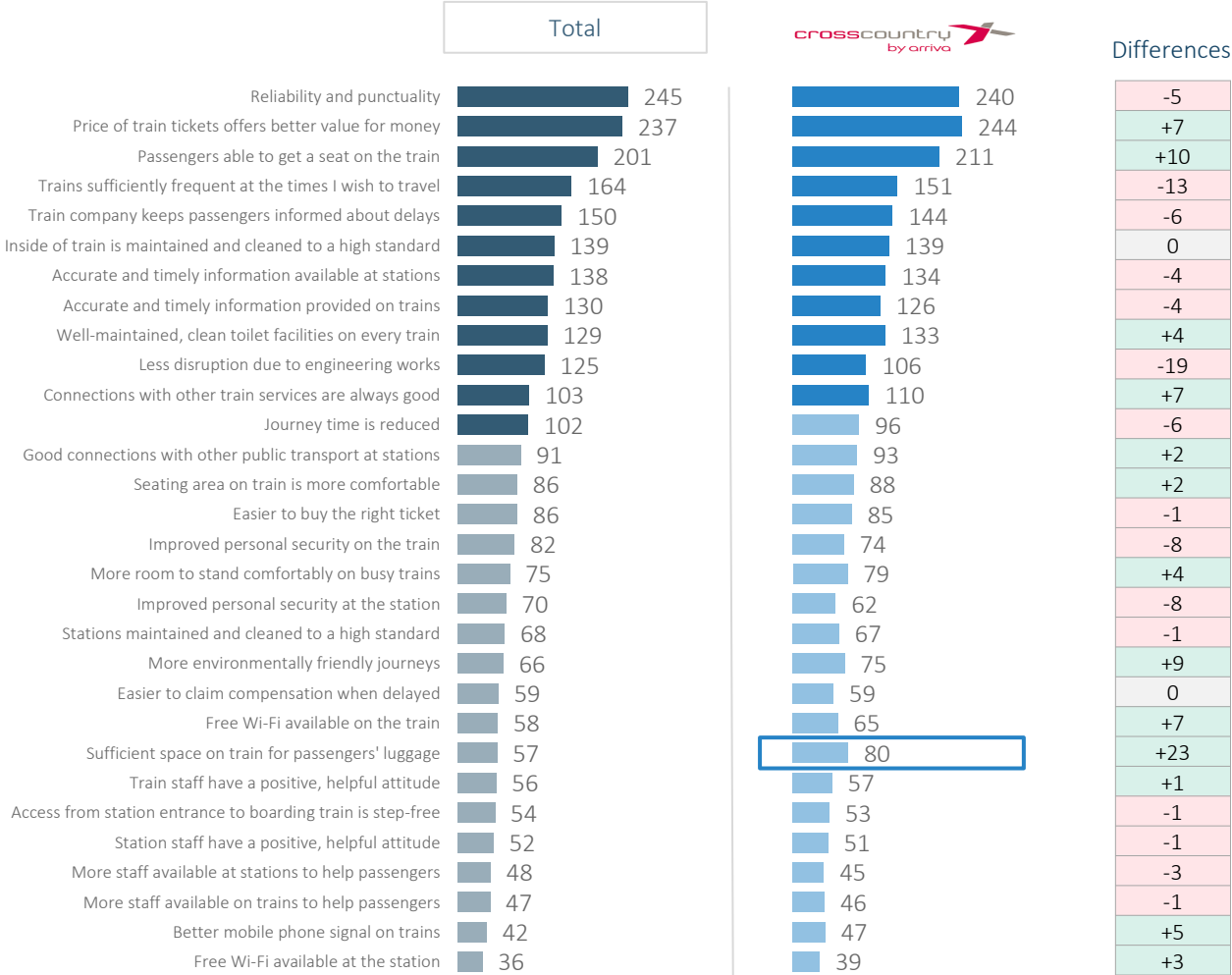
Darker bars indicate index score over 100



# While key improvement priorities remain the same, having sufficient luggage space is a particular concern for CrossCountry passengers

Improvement priorities by CrossCountry passengers [index]

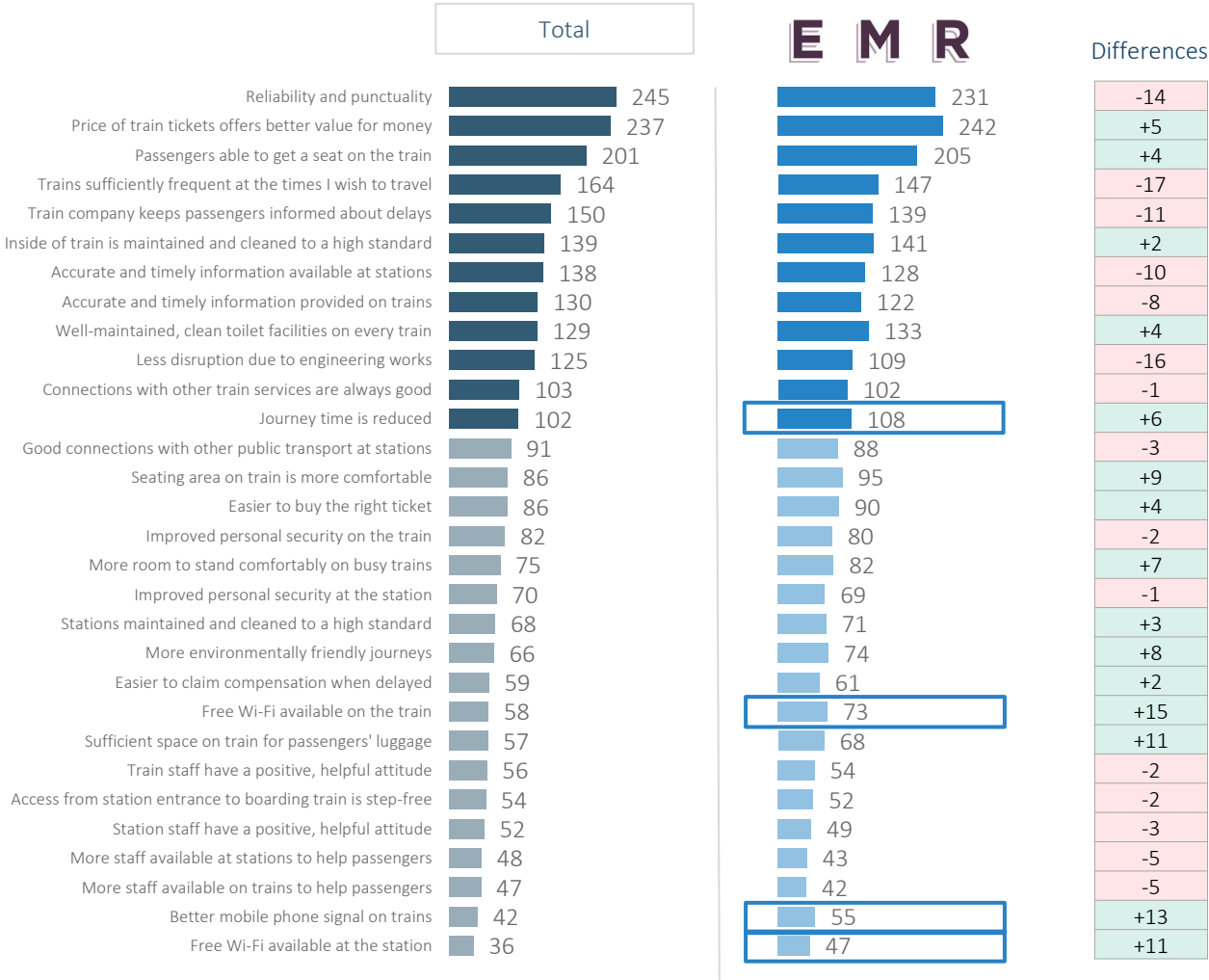
Darker bars indicate index score over 100



# Users of **East Midlands Railway** are more concerned about reducing journey times, as well as better train/station Wi-Fi, and better mobile signal on trains - although the latter three remain lesser priorities

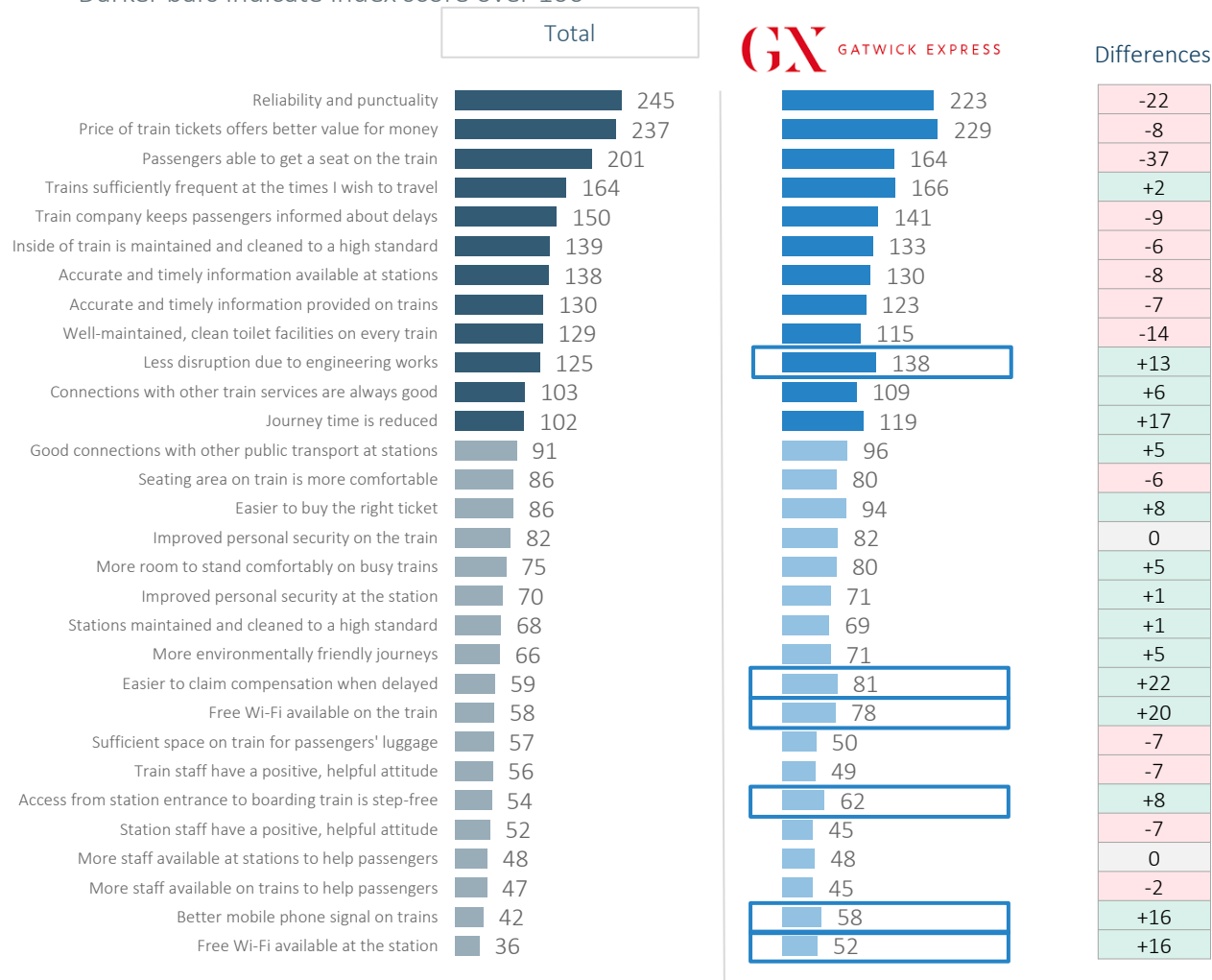
Improvement priorities by **East Midlands Railway** passengers [index]

Darker bars indicate index score over 100



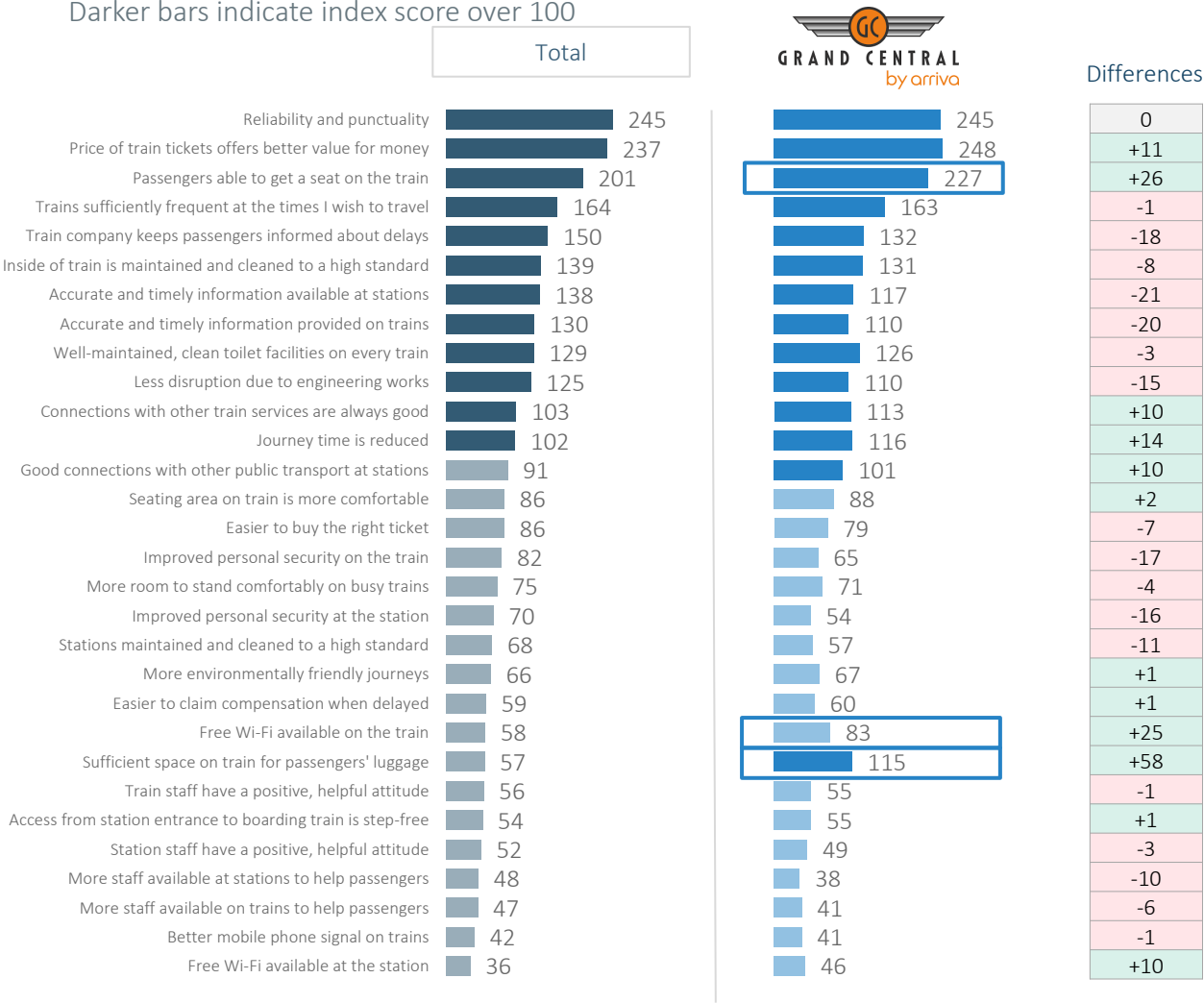
# Gatwick Express passengers score many of their top ten priorities lower than the wider passenger population. However less engineering work, step-free accessibility, easier compensation for delays, better mobile phone signal and Wi-Fi connectivity are all key priorities in comparison

Improvement priorities by Gatwick Express passengers [index]  
Darker bars indicate index score over 100



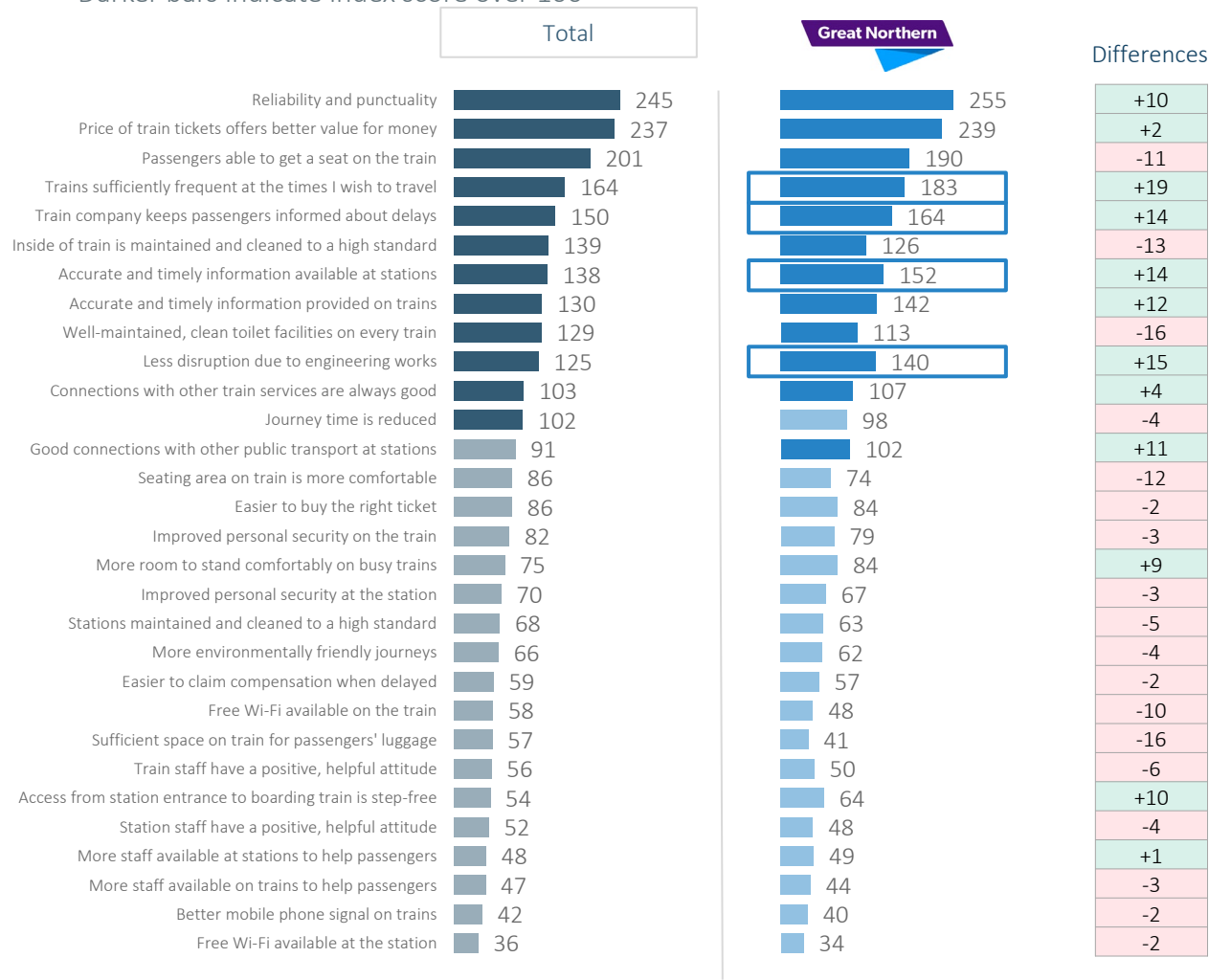
# For Grand Central passengers, the availability of seats on trains, space for passenger luggage and free Wi-Fi are key in comparison to the wider passenger population

Improvement priorities by Grand Central passengers [index]  
Darker bars indicate index score over 100



# For Great Northern passengers, train frequency, receiving accurate and timely information, and less engineering disruption are more pressing concerns than for the wider passenger population

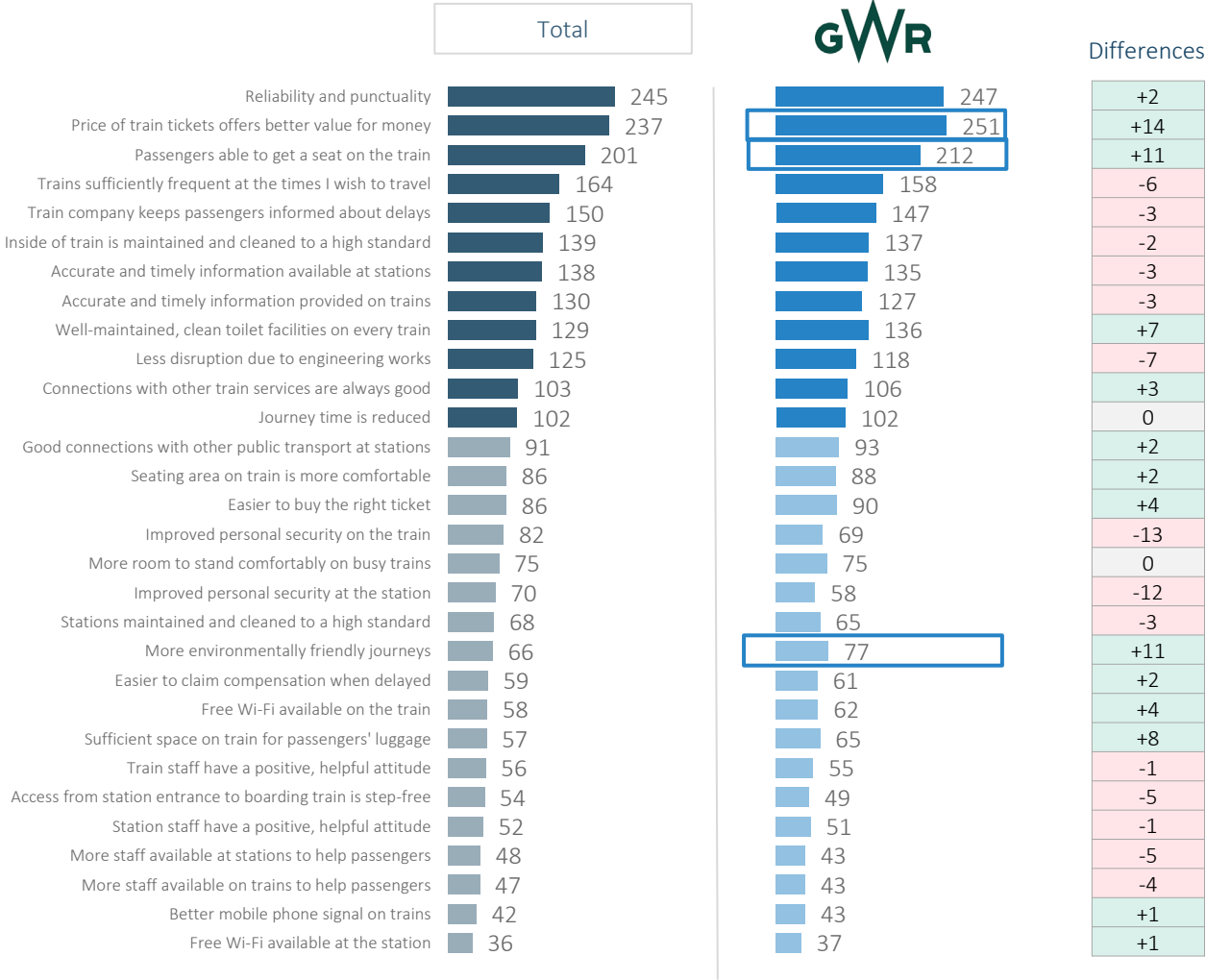
Improvement priorities by Great Northern passengers [index]  
Darker bars indicate index score over 100





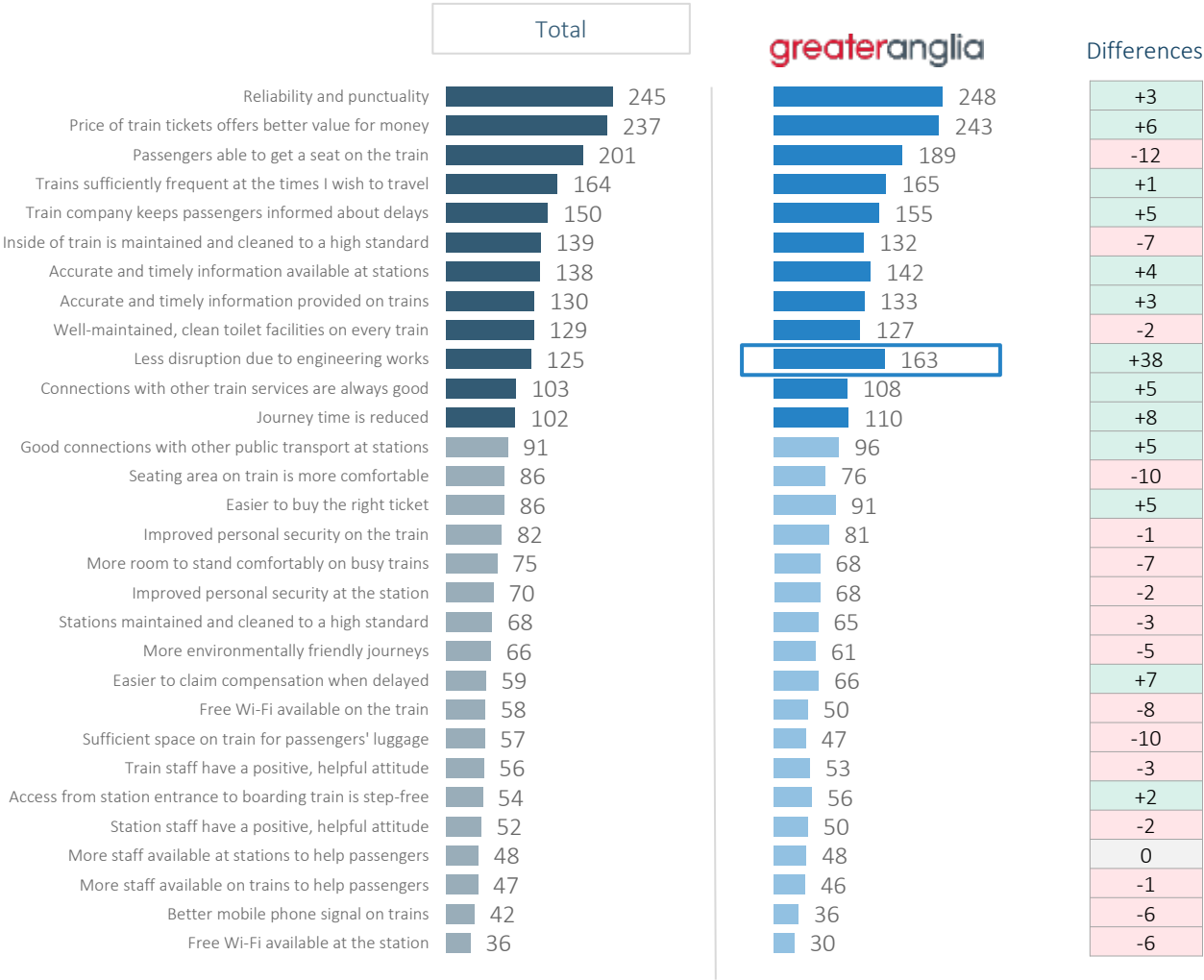
# For Great Western Railway passengers, environmentally friendly travel, seat availability and better value for money are considered a greater priority than for the average passenger

Improvement priorities by Great Western Railway passengers [index]  
Darker bars indicate index score over 100



# Featuring fifth in their overall rank for improvement priorities, **Greater Anglia** passengers mention engineering disruption as a particularly pressing concern

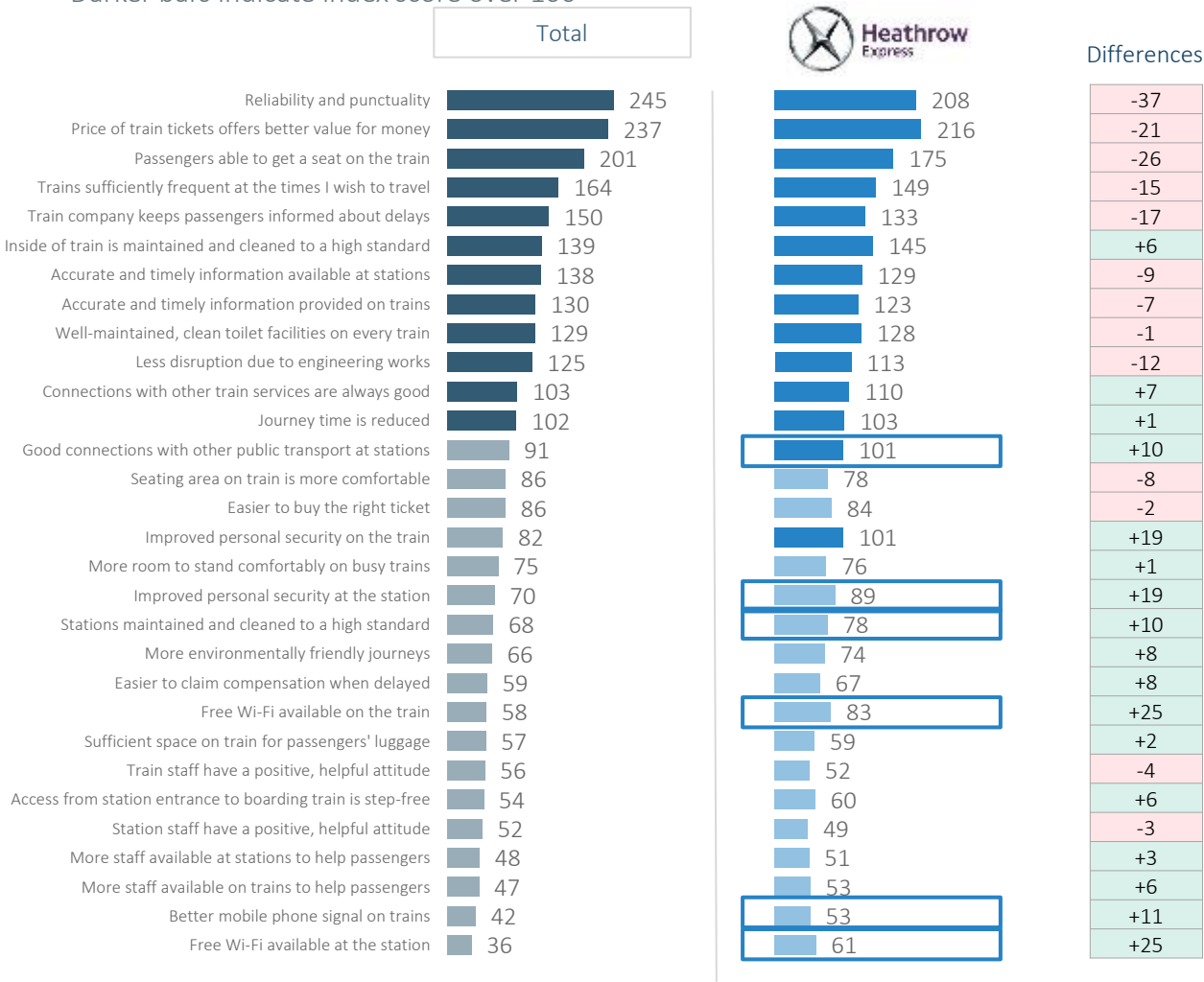
Improvement priorities by **Greater Anglia** passengers [index]  
Darker bars indicate index score over 100



# Heathrow Express passengers rank most of the top ten priorities lower than the wider passenger population. Instead, focus is on a range of other areas including free Wi-Fi, mobile phone signal, security, cleanliness and good links with other forms of transport

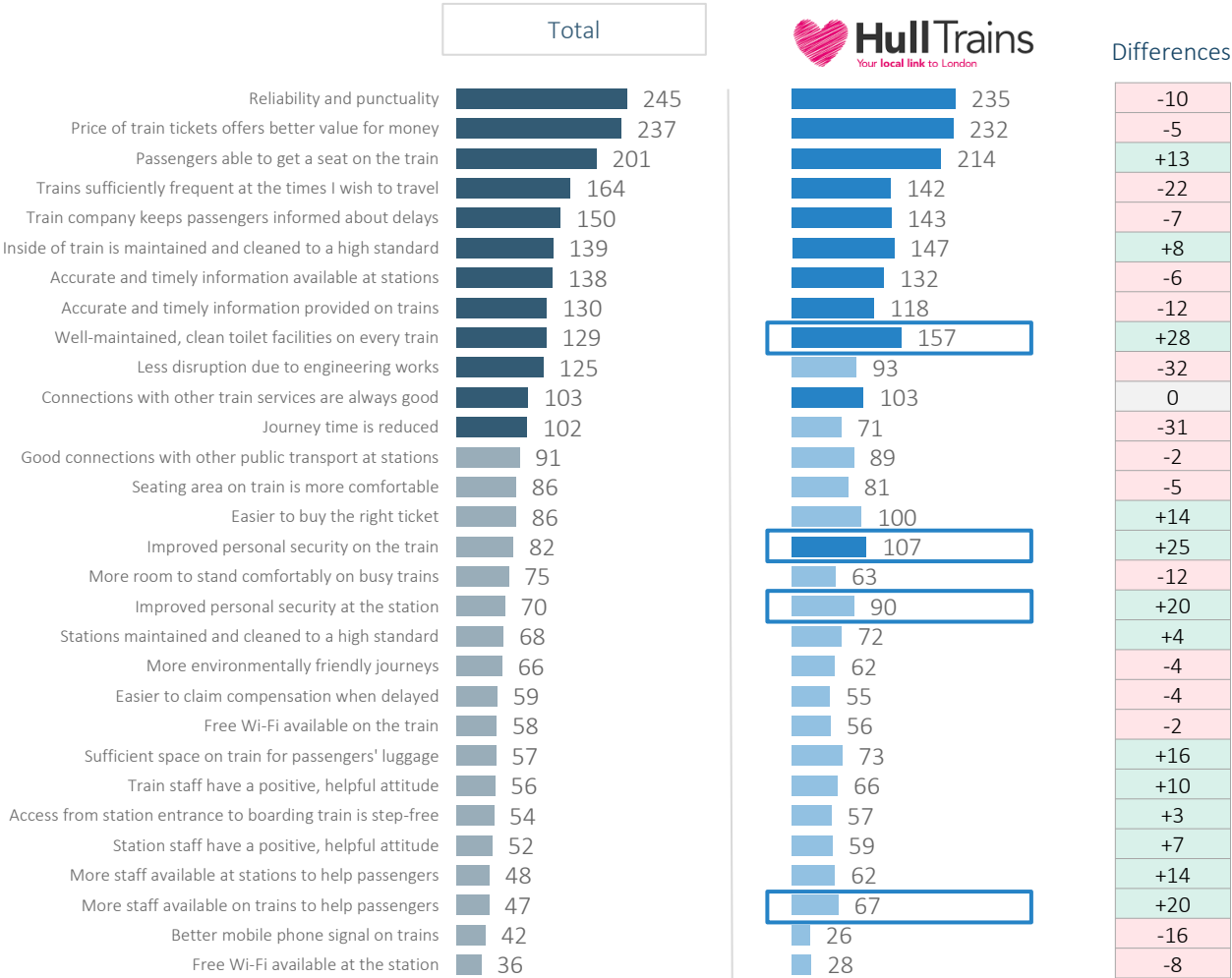
Improvement priorities by Heathrow Express passengers [index]

Darker bars indicate index score over 100



# For Hull Trains passengers, clean toilet facilities, increased staff availability and improved personal security would be particularly welcomed

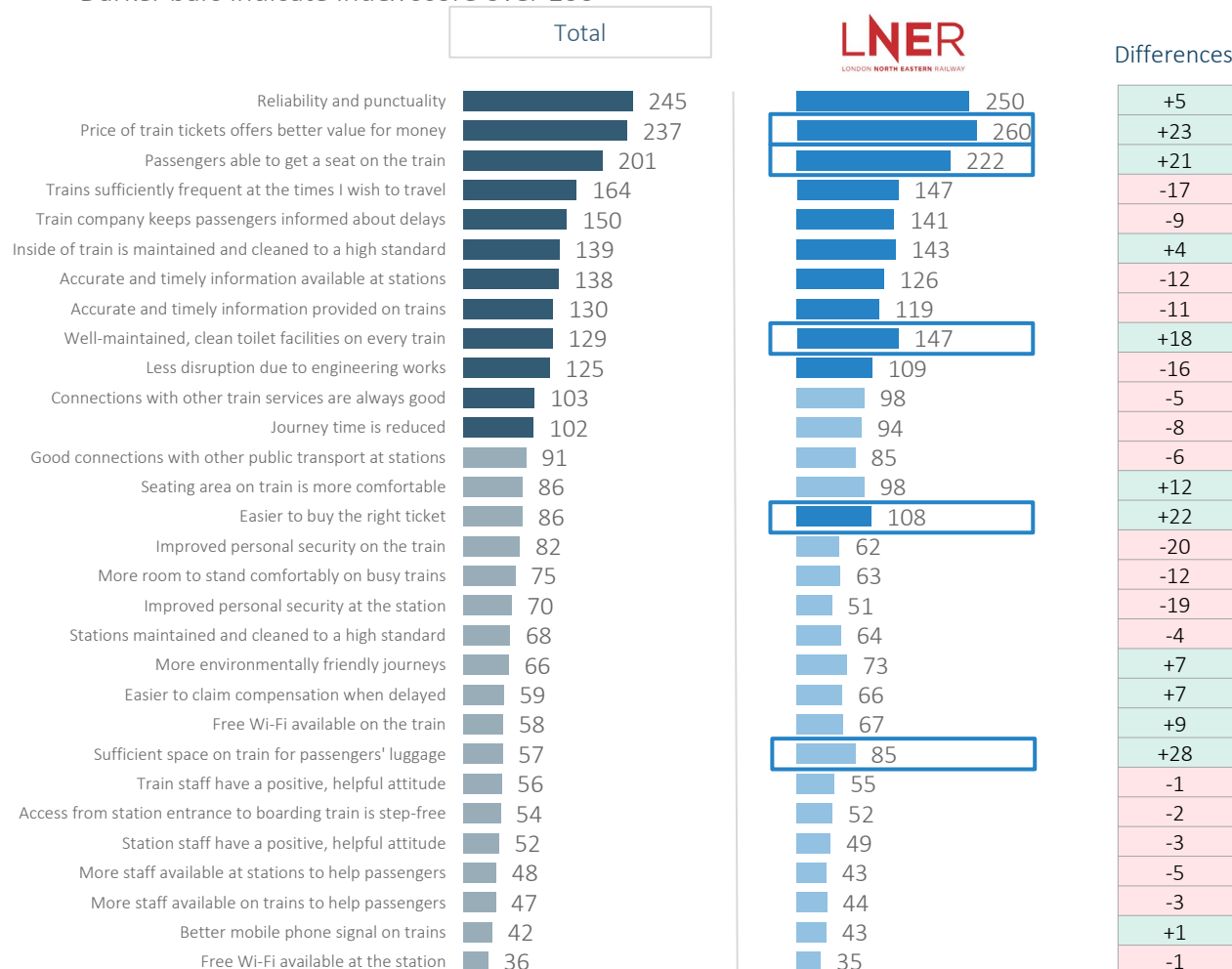
Improvement priorities by Hull Trains passengers [index]  
Darker bars indicate index score over 100



# For London North Eastern Railway passengers, more space for luggage, easier ticket buying, better value for money, availability of seats and cleaner toilet facilities are particularly sought after areas of improvement

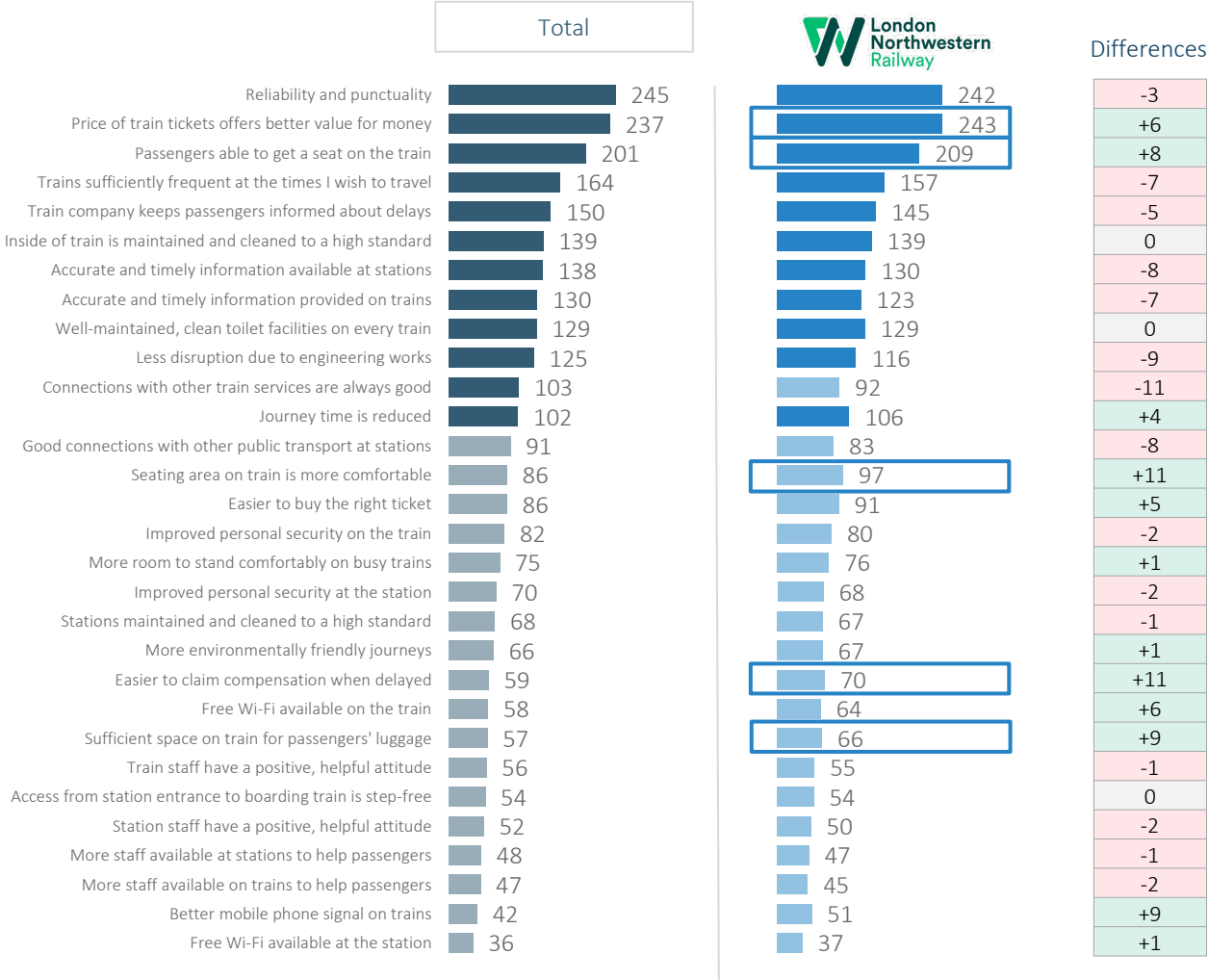
Improvement priorities by London North Eastern Railway passengers [index]

Darker bars indicate index score over 100



# London Northwestern Railway users express particular concern around availability and comfort of seating, value for money, having enough space for luggage and ease of claiming compensation when trains are delayed

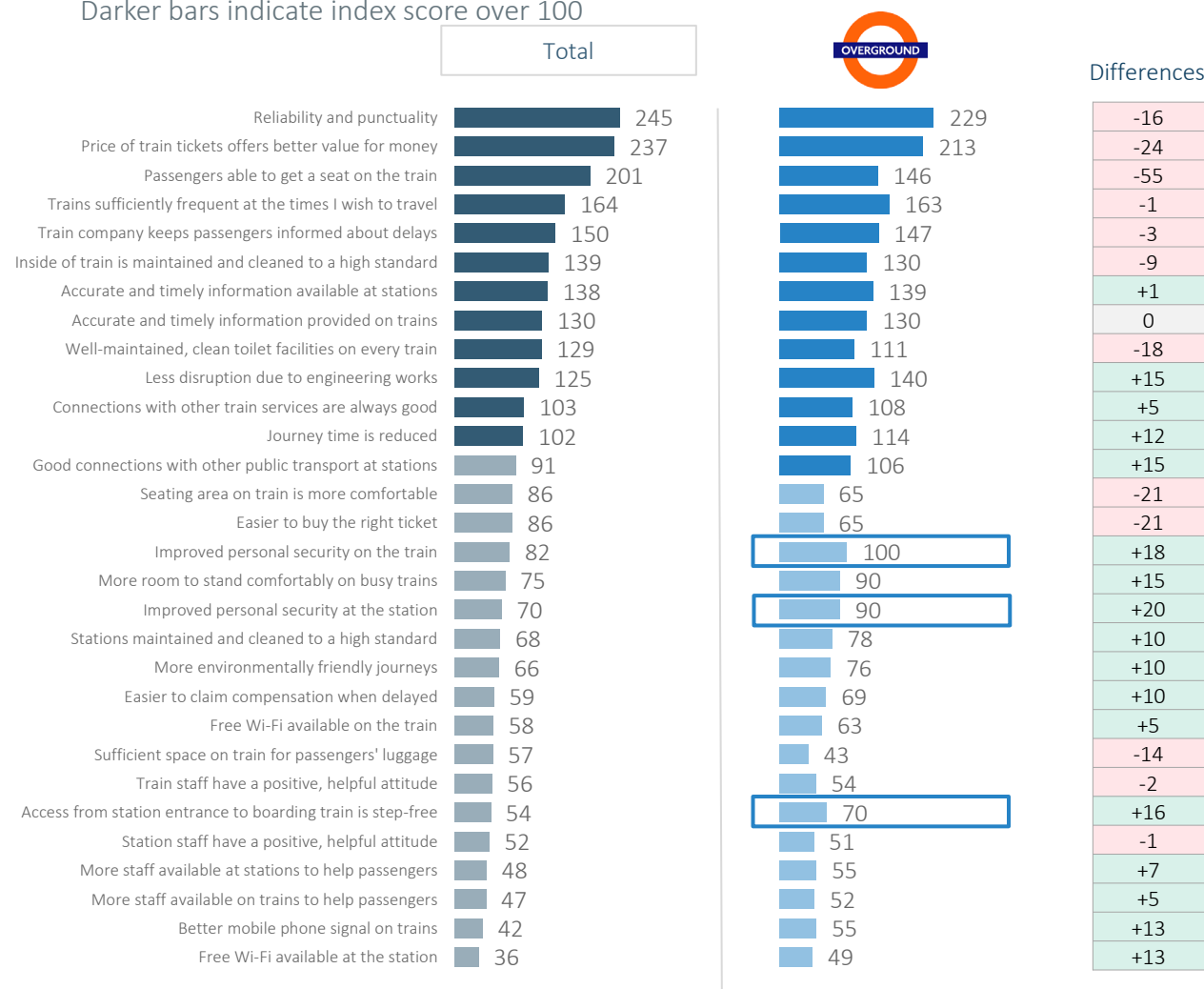
Improvement priorities by London Northwestern Railway passengers [index]  
Darker bars indicate index score over 100



# The top three priorities are less of a concern for **London Overground** passengers, however personal security and step-free access are more important than elsewhere

Improvement priorities by **London Overground** passengers [index]

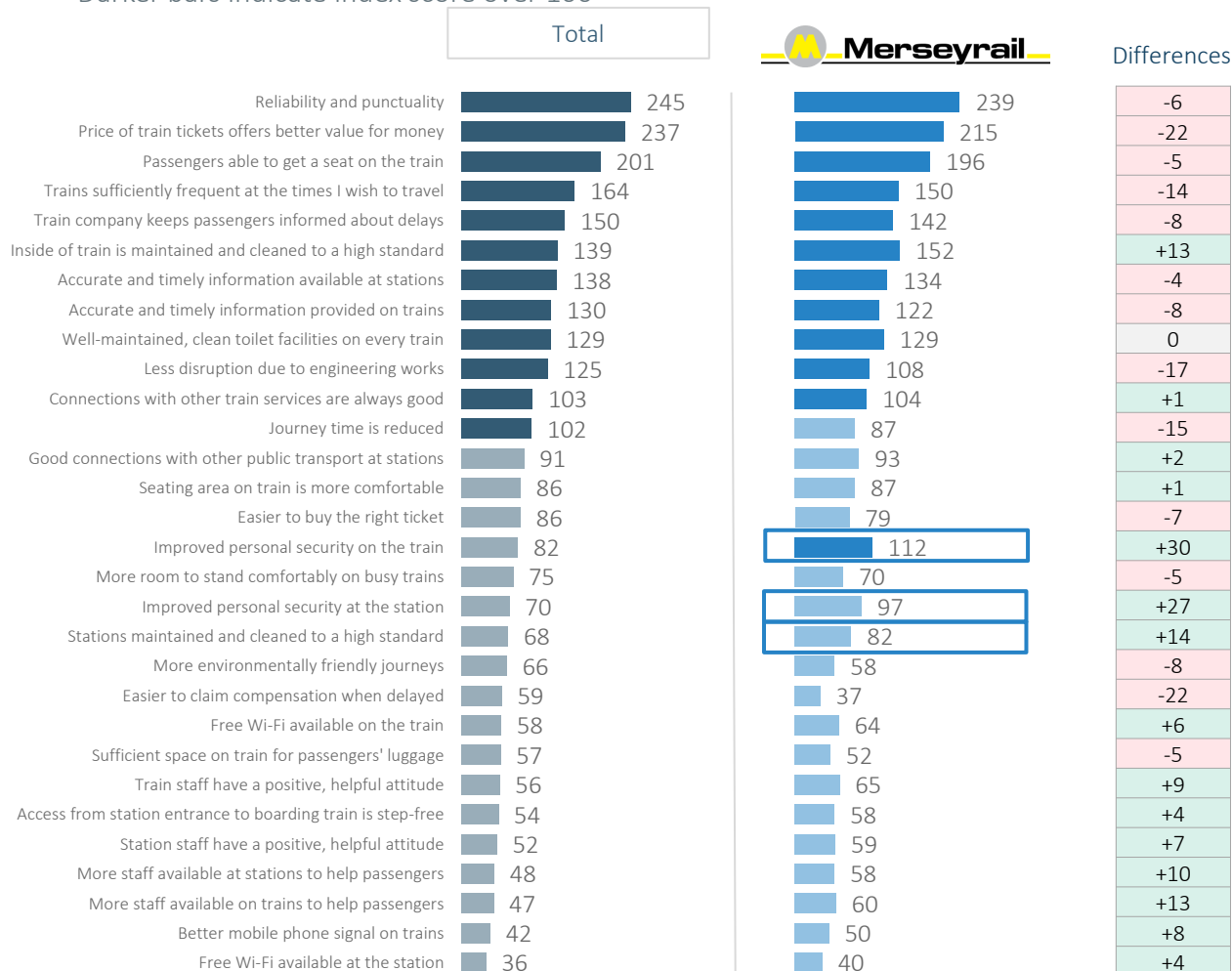
Darker bars indicate index score over 100



# Merseyrail passengers express a greater desire than the general population for improved personal security, as well as higher levels of cleanliness at stations

Improvement priorities by Merseyrail passengers [index]

Darker bars indicate index score over 100

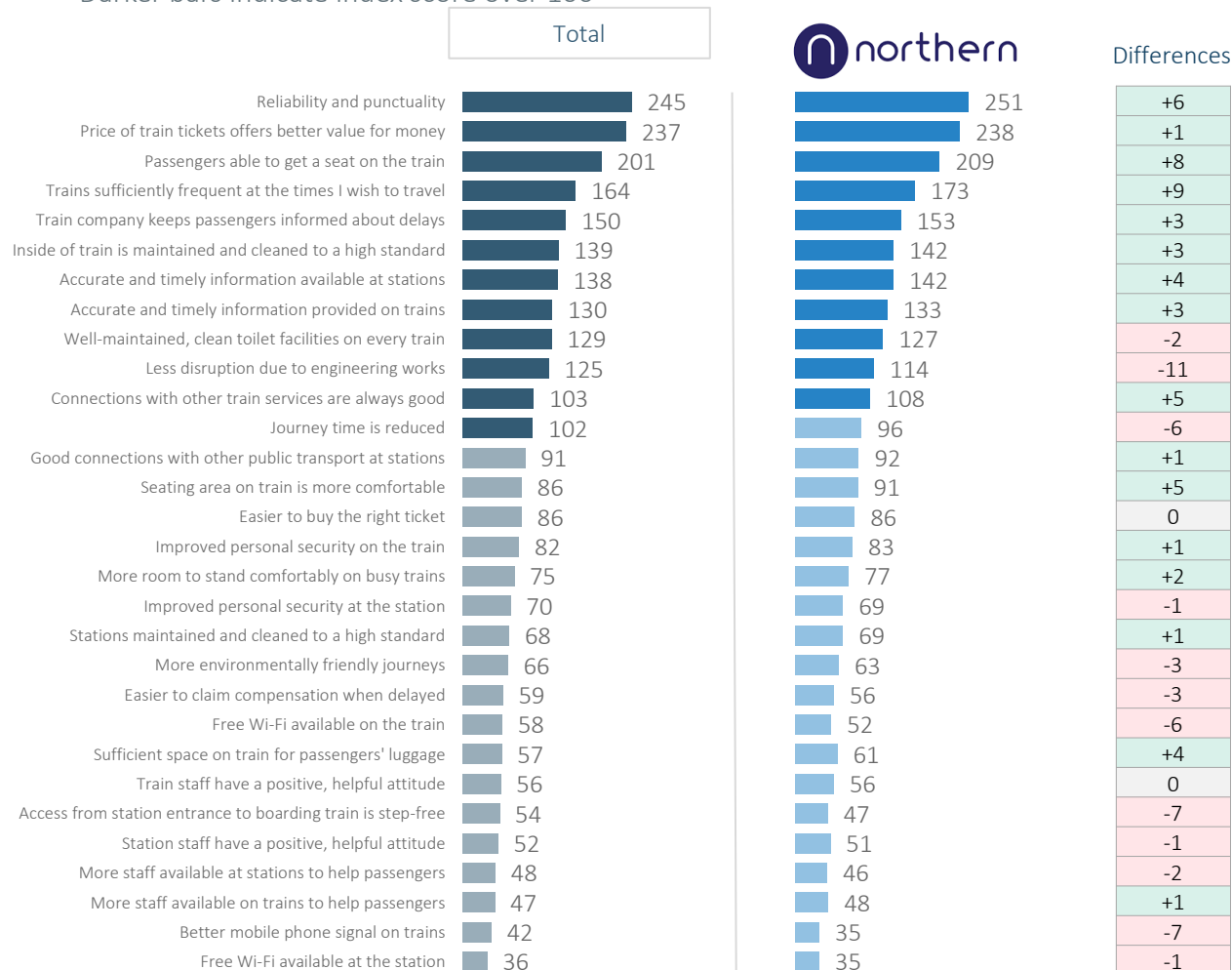




# Improvement priorities for **Northern** passengers mirror those of the wider passenger population

Improvement priorities by **Northern** passengers [index]

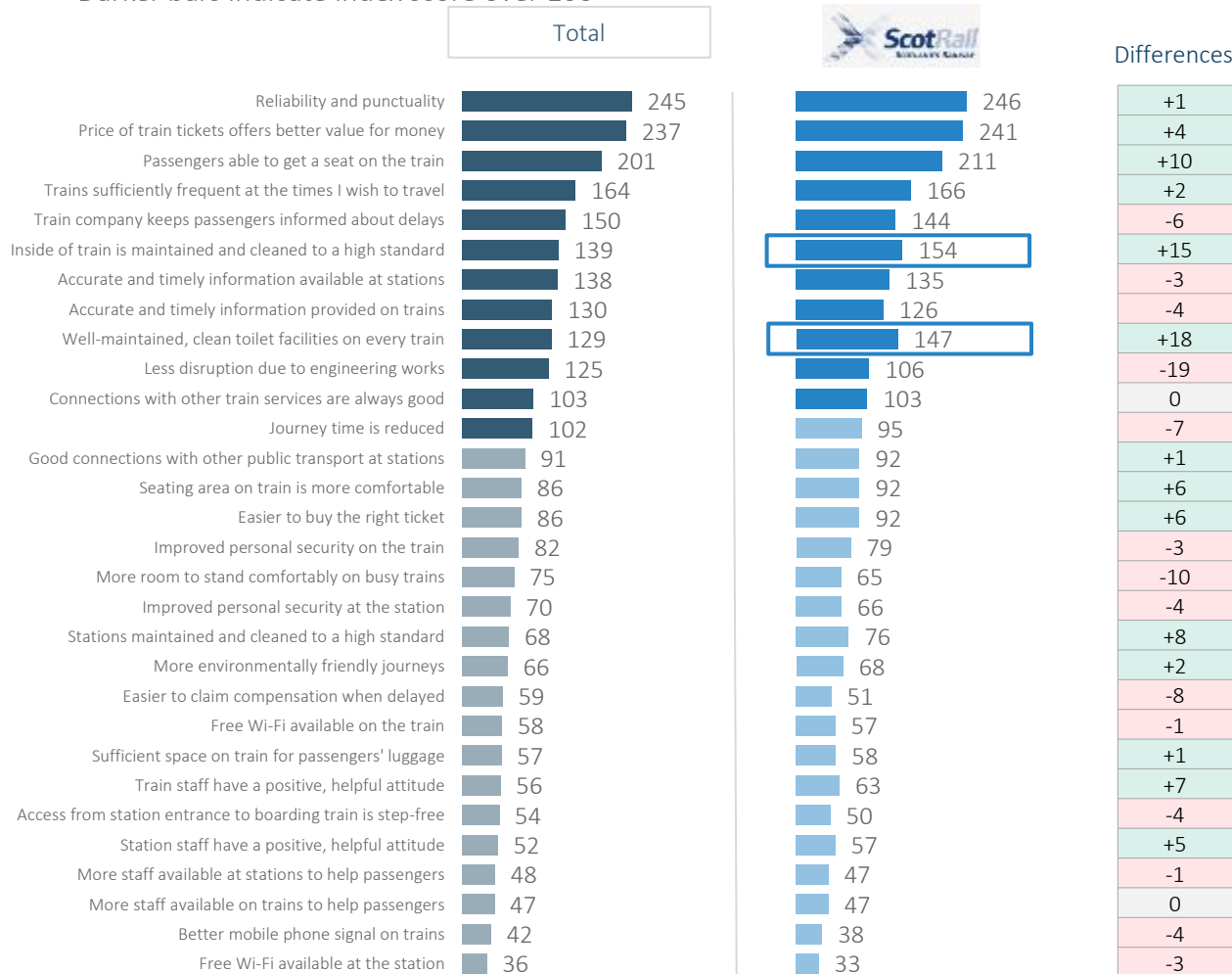
Darker bars indicate index score over 100



# Cleanliness inside the train and of toilet facilities is a particularly welcome area of improvement for Scotrail passengers

Improvement priorities by Scotrail passengers [index]

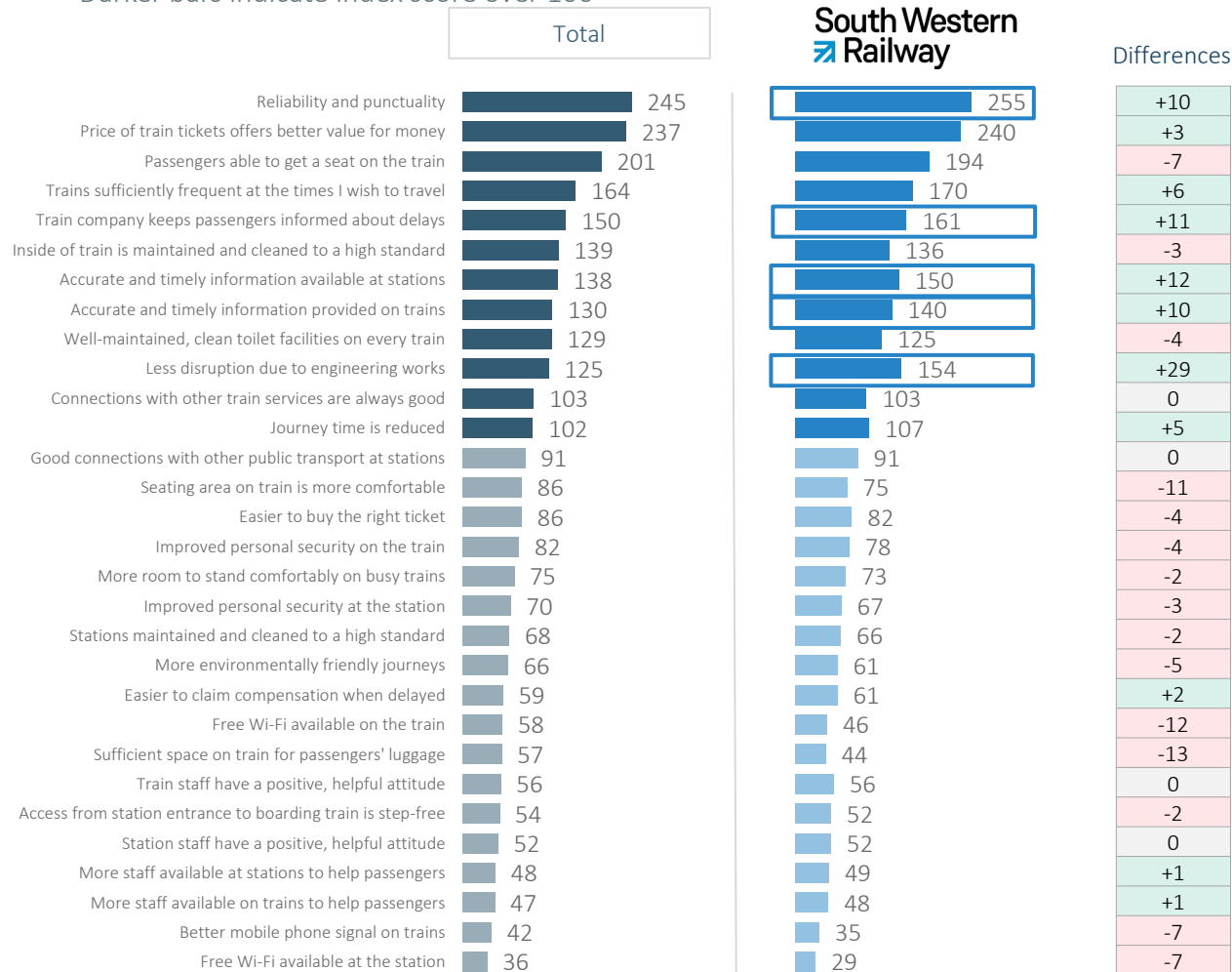
Darker bars indicate index score over 100



# Among South Western Railway passengers, reliability/punctuality, accuracy/speed of information and disruption are even more important areas for improvement

Improvement priorities by South Western Railway passengers [index]

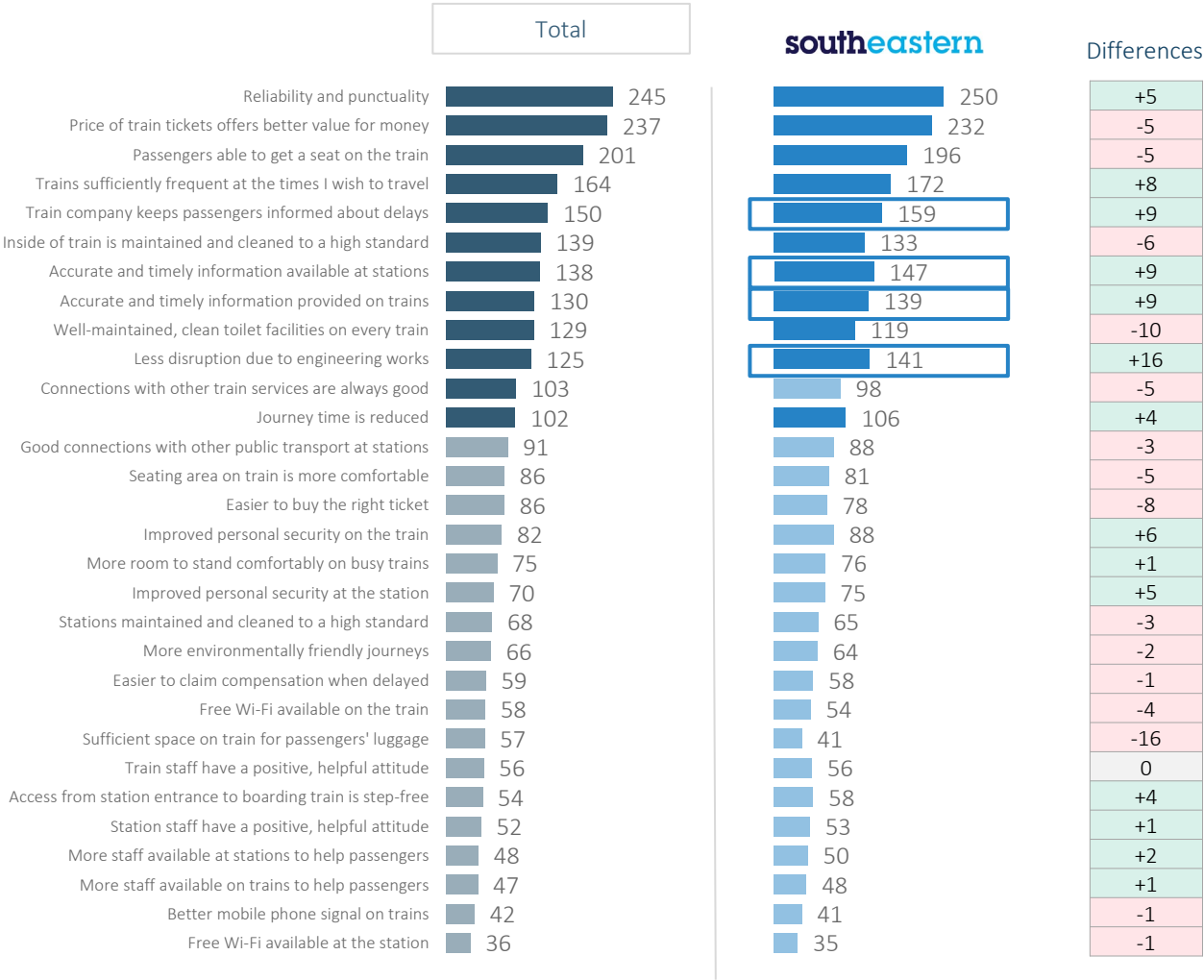
Darker bars indicate index score over 100



# Southeastern passengers express particular concern about disruption due to engineering works, as well as availability of information regarding delays and on trains and at stations

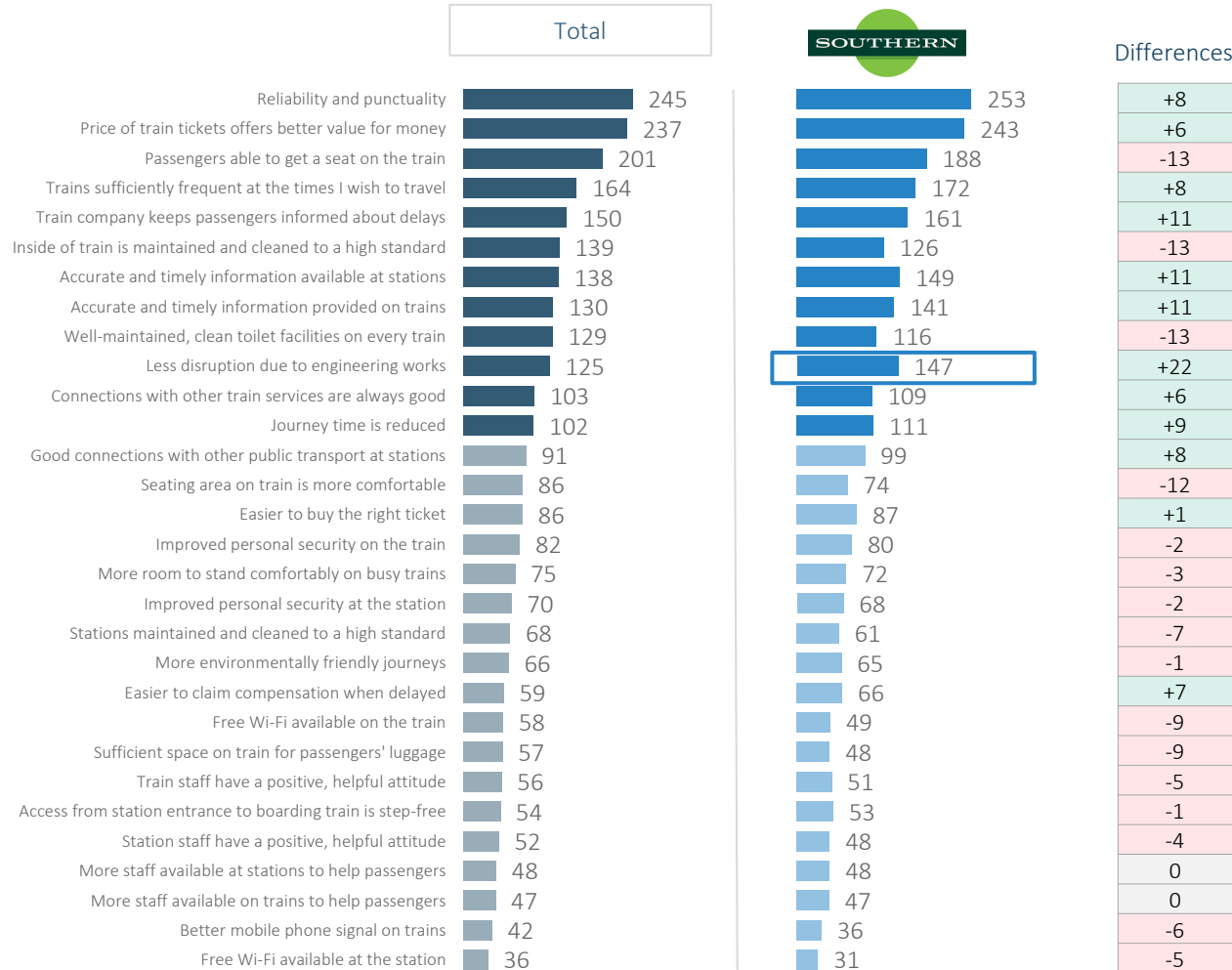
Improvement priorities by **Southeastern** passengers [index]

Darker bars indicate index score over 100



# Engineering work disruption is particularly important area for improvement among Southern passengers

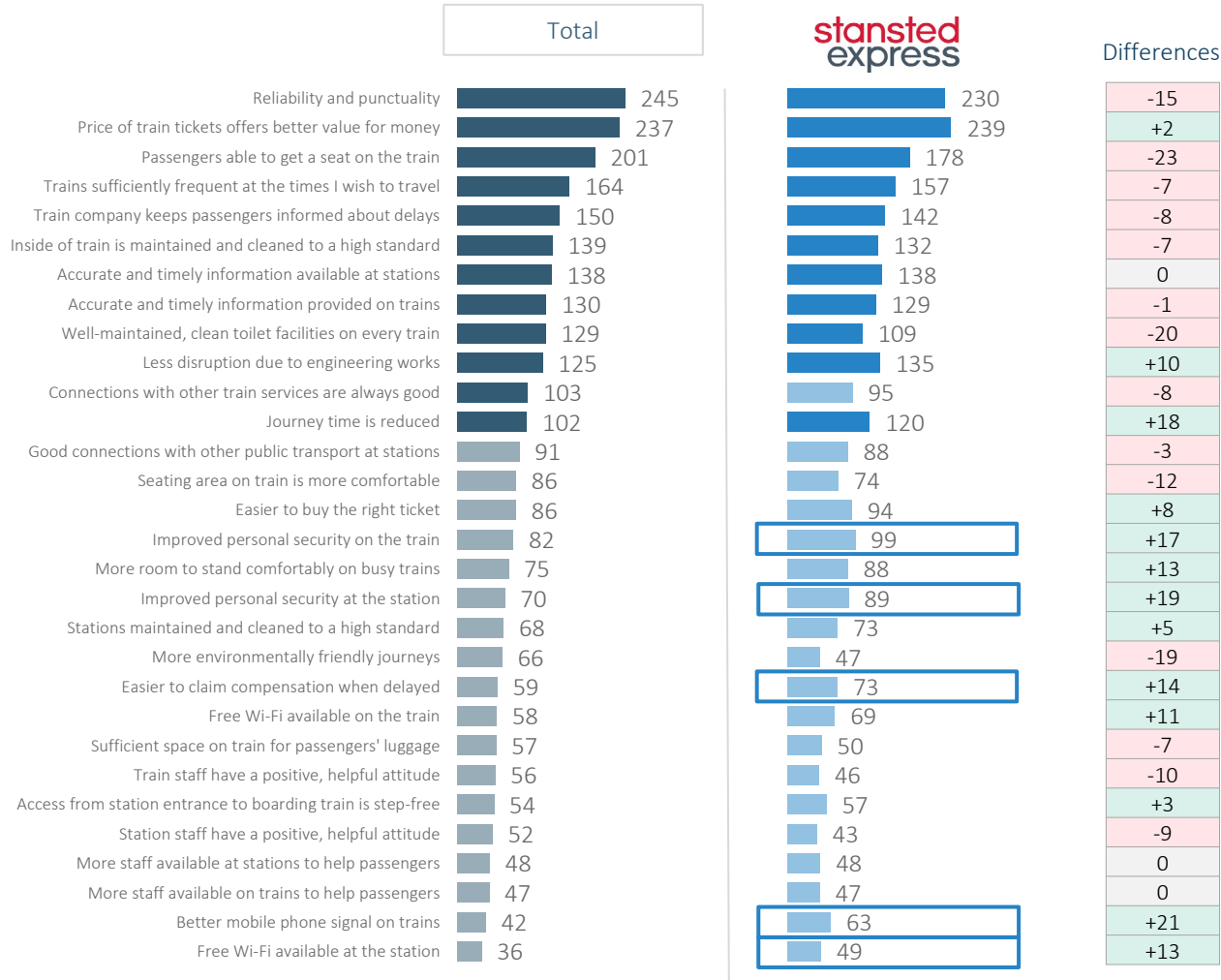
Improvement priorities by Southern passengers [index]  
Darker bars indicate index score over 100



# While the top nine priorities rank lower than the wider passenger population, **Stansted Express** passengers prioritise easy compensation claims, personal security, mobile phone signal and station Wi-Fi

Improvement priorities by **Stansted Express** passengers [index]

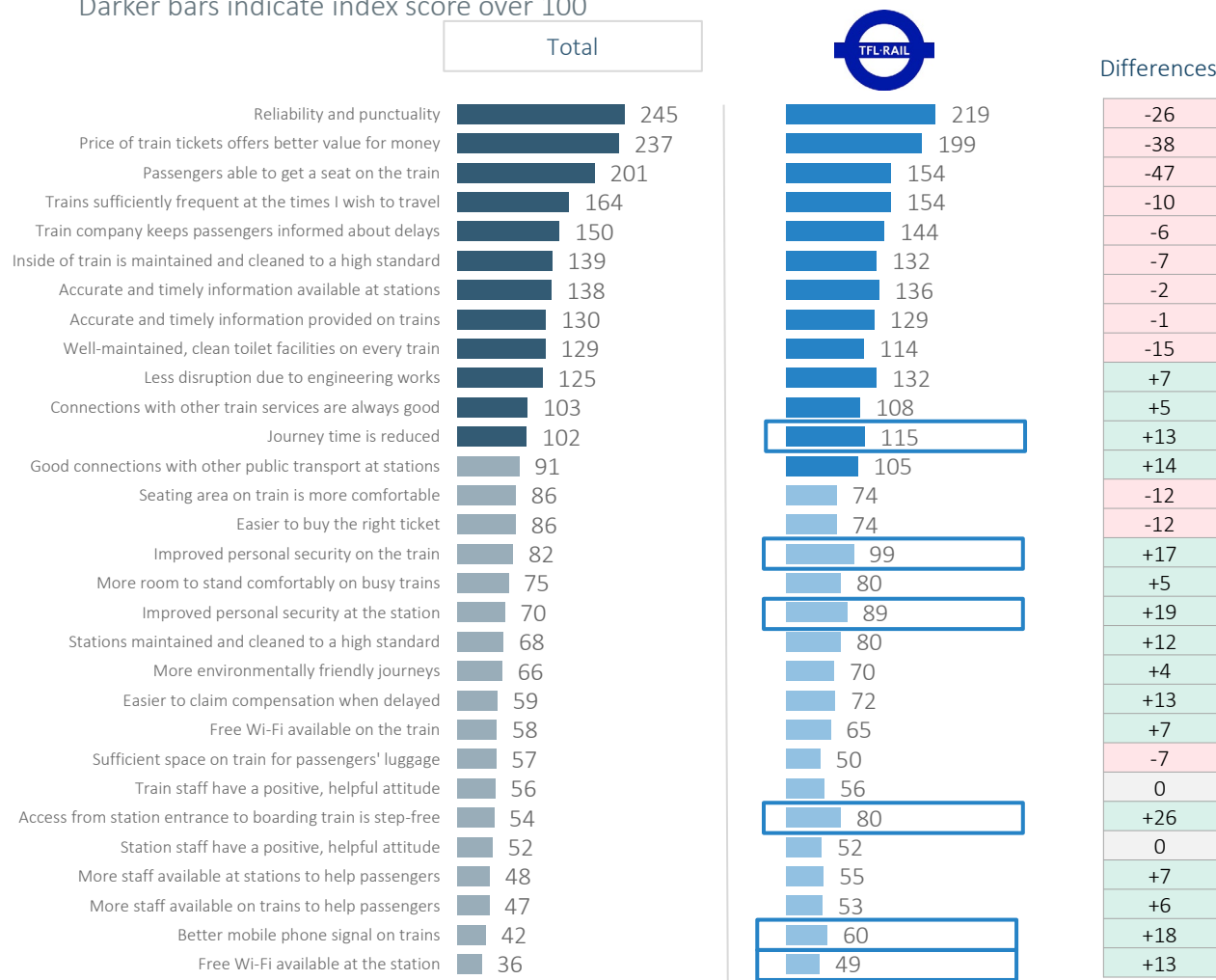
Darker bars indicate index score over 100



# Reduced journey times are a key area for improvement among TfL Rail passengers, as well as step-free access and improved personal security, better mobile signal and station Wi-Fi

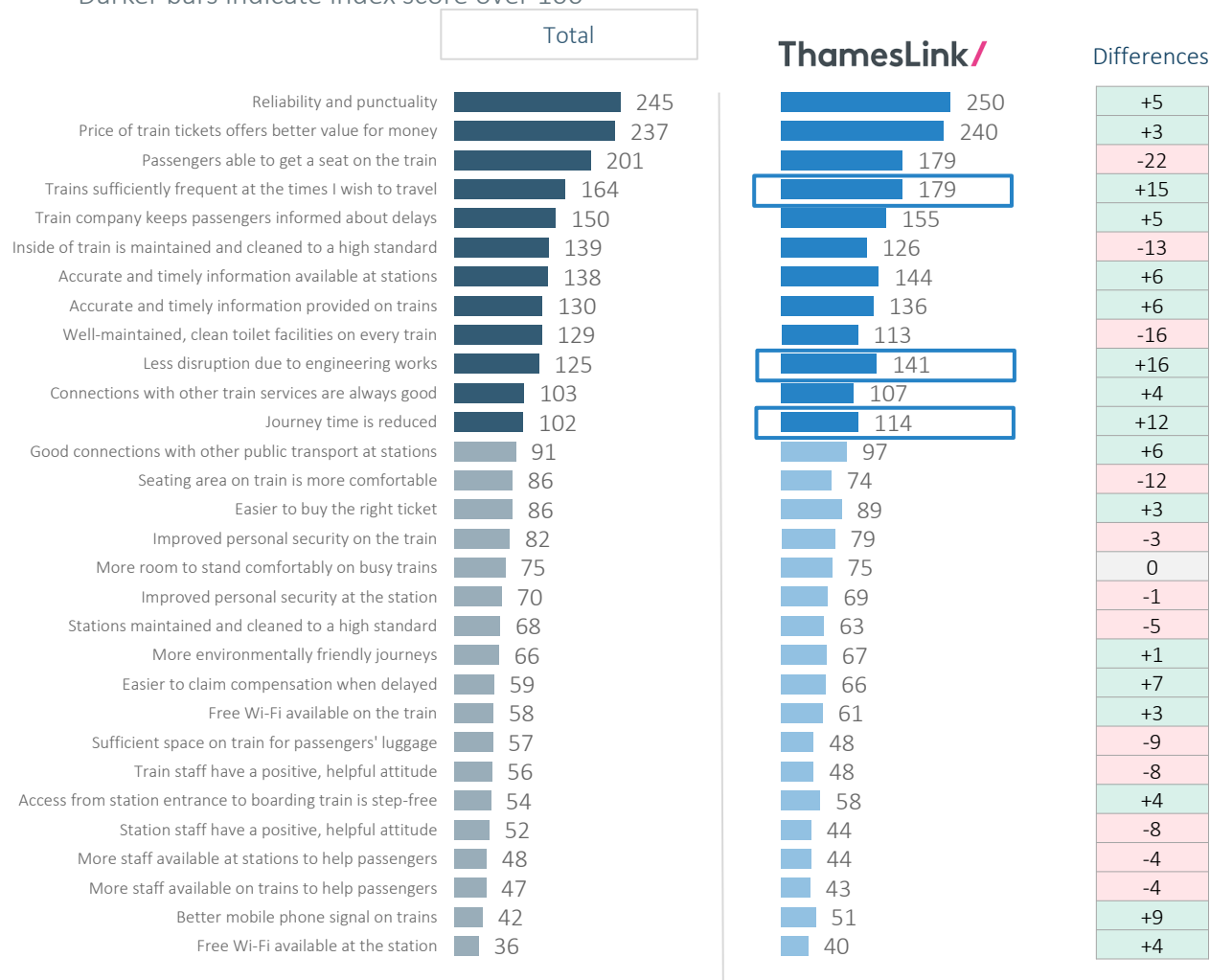
Improvement priorities by TfL Rail passengers [index]

Darker bars indicate index score over 100



# For **Thameslink** passengers, engineering disruption is a particular key concern, as are the frequency of trains and journey times

Improvement priorities by **Thameslink** passengers [index]  
Darker bars indicate index score over 100

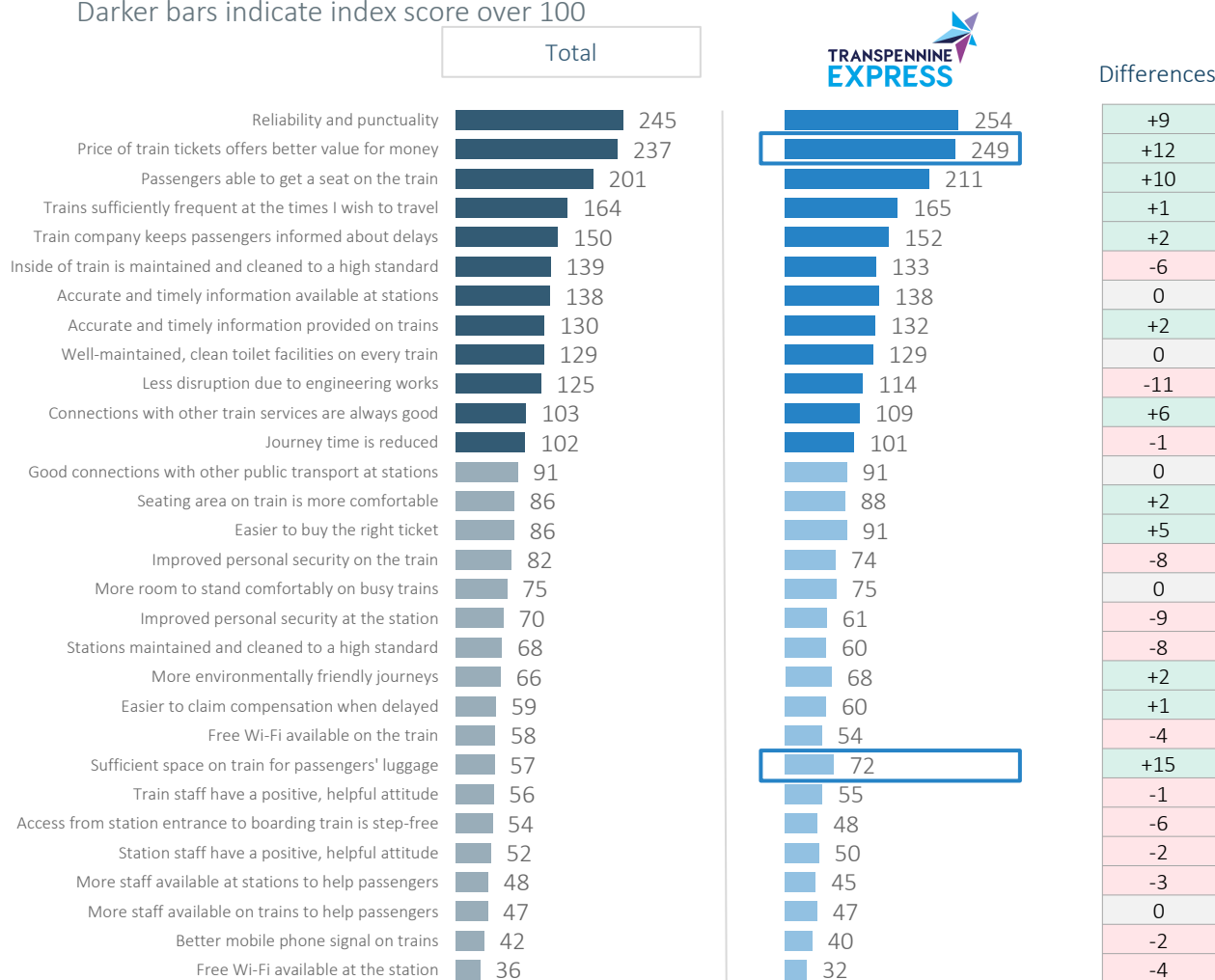




# For TransPennine Express passengers, value for money is an even bigger priority. While still ranking relatively low, luggage space is a greater concern than among the wider passenger population

Improvement priorities by TransPennine Express passengers [index]

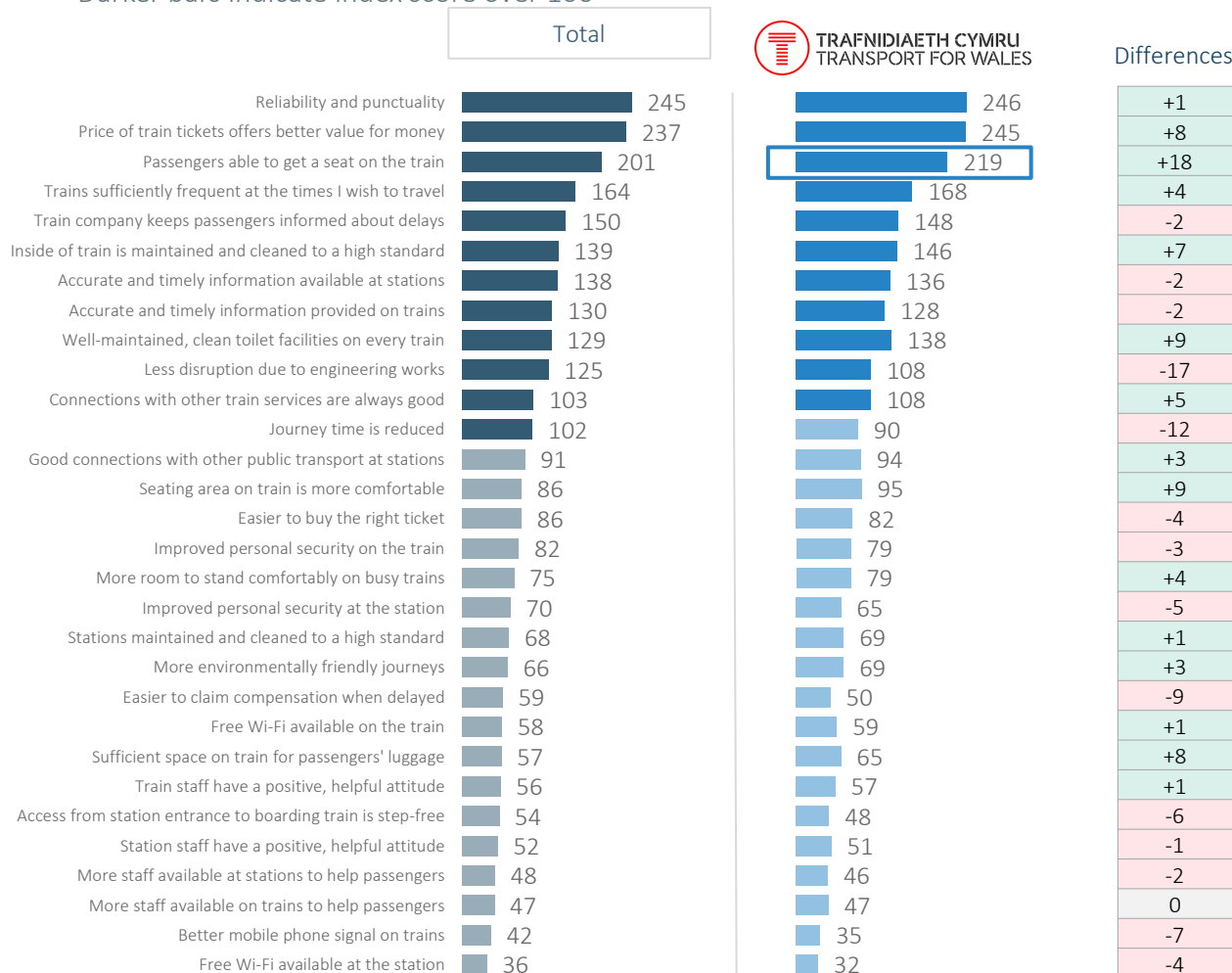
Darker bars indicate index score over 100



# Availability of seats is an even greater priority for **Transport for Wales** passengers. Otherwise, improvement priorities resemble that of the wider passenger population

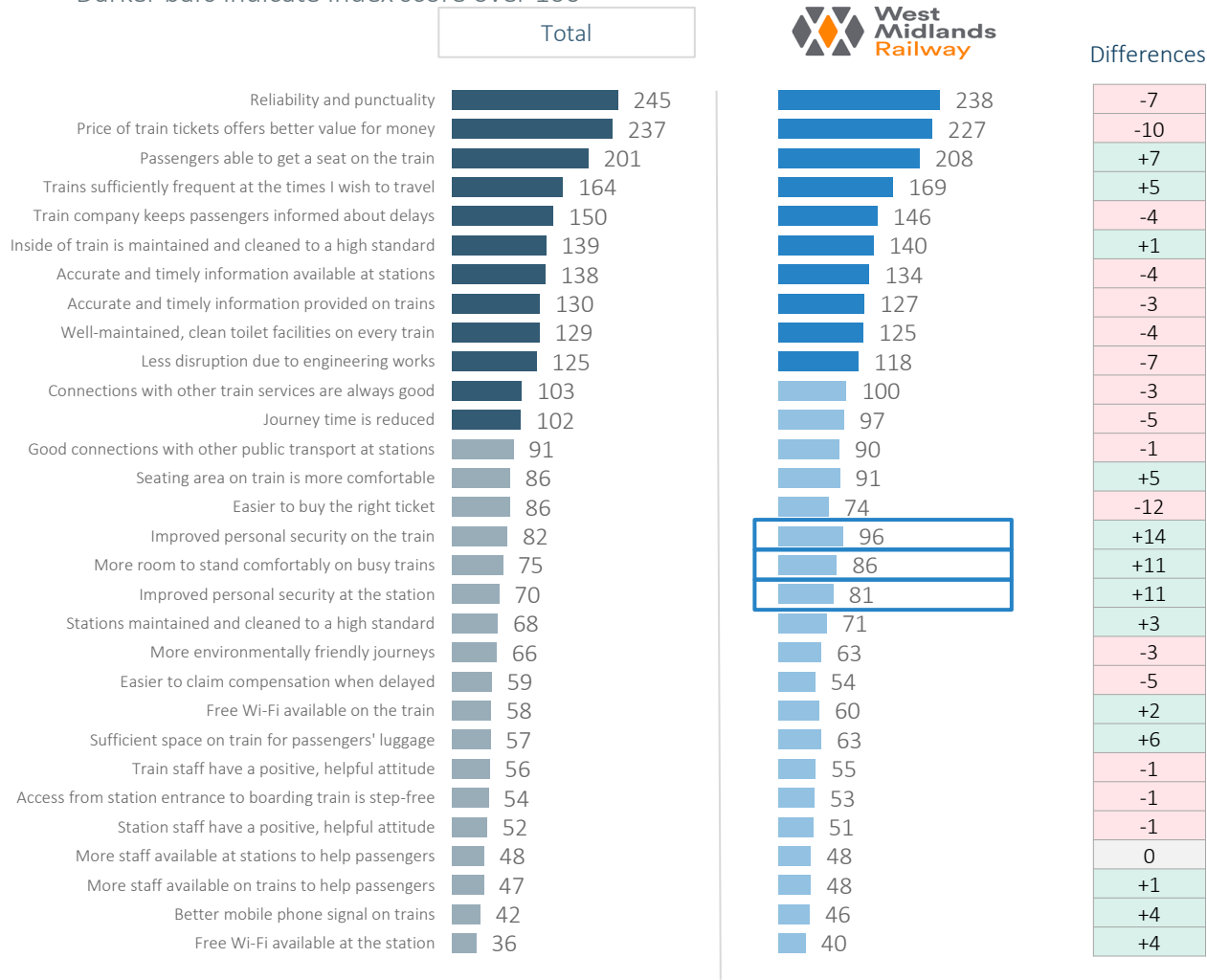
Improvement priorities by **Transport for Wales** passengers [index]

Darker bars indicate index score over 100



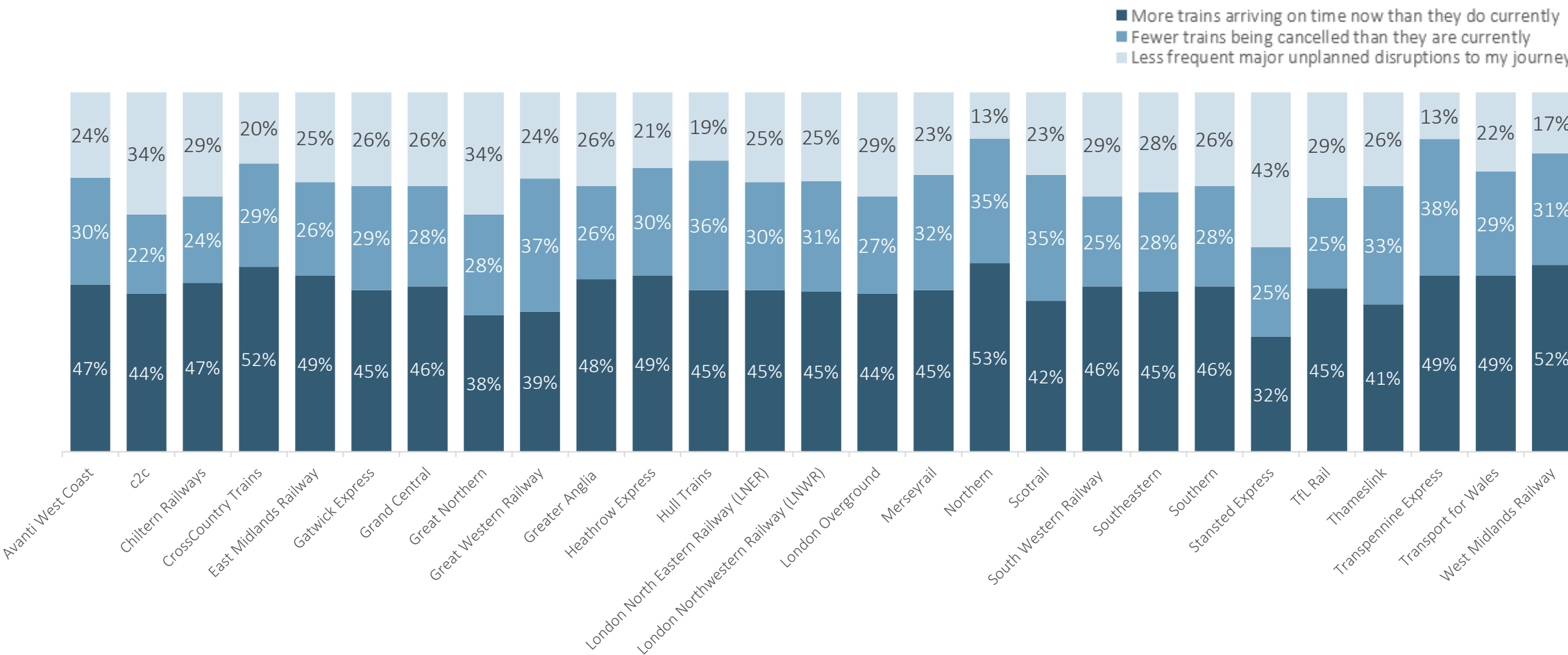
# While key priorities are the same, several mid-ranking features are a bigger cause for concern for **West Midlands Railway** passengers, as well as train standing space and improved personal security at the station

Improvement priorities by **West Midlands Railway** passengers [index]  
Darker bars indicate index score over 100



# Regarding reliability, Northern passengers are most likely to prioritise more trains arriving on time than they do currently, followed closely by CrossCountry Trains passengers

Reliability of train services by TOC  
% that chose each statement as their first priority



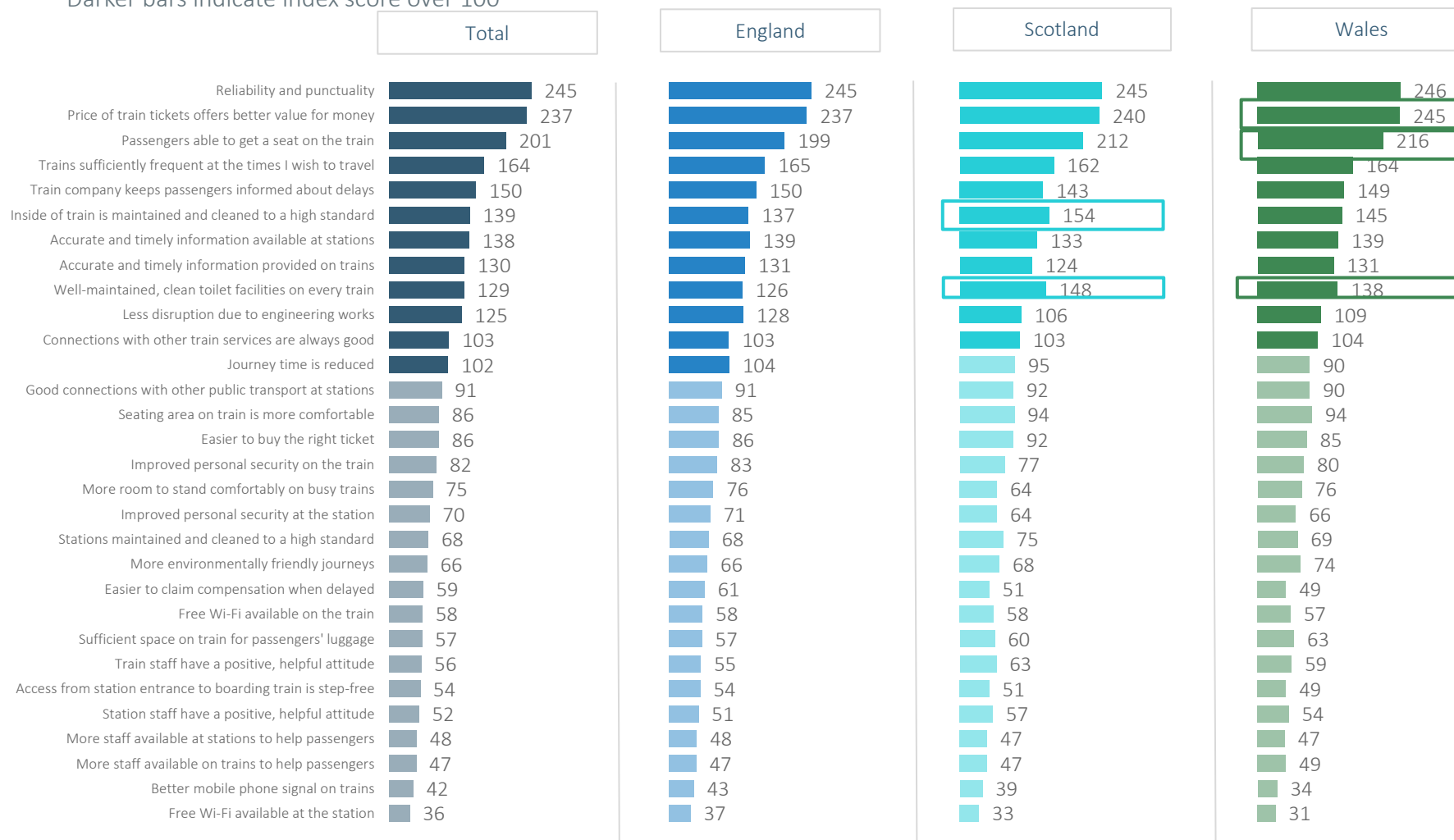
# Priorities by Nation / Region

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# Passengers in Wales are slightly more concerned about value for money, while toilet facilities and train cleanliness are a particular concern for those in Scotland

Improvement priorities by Country [index]

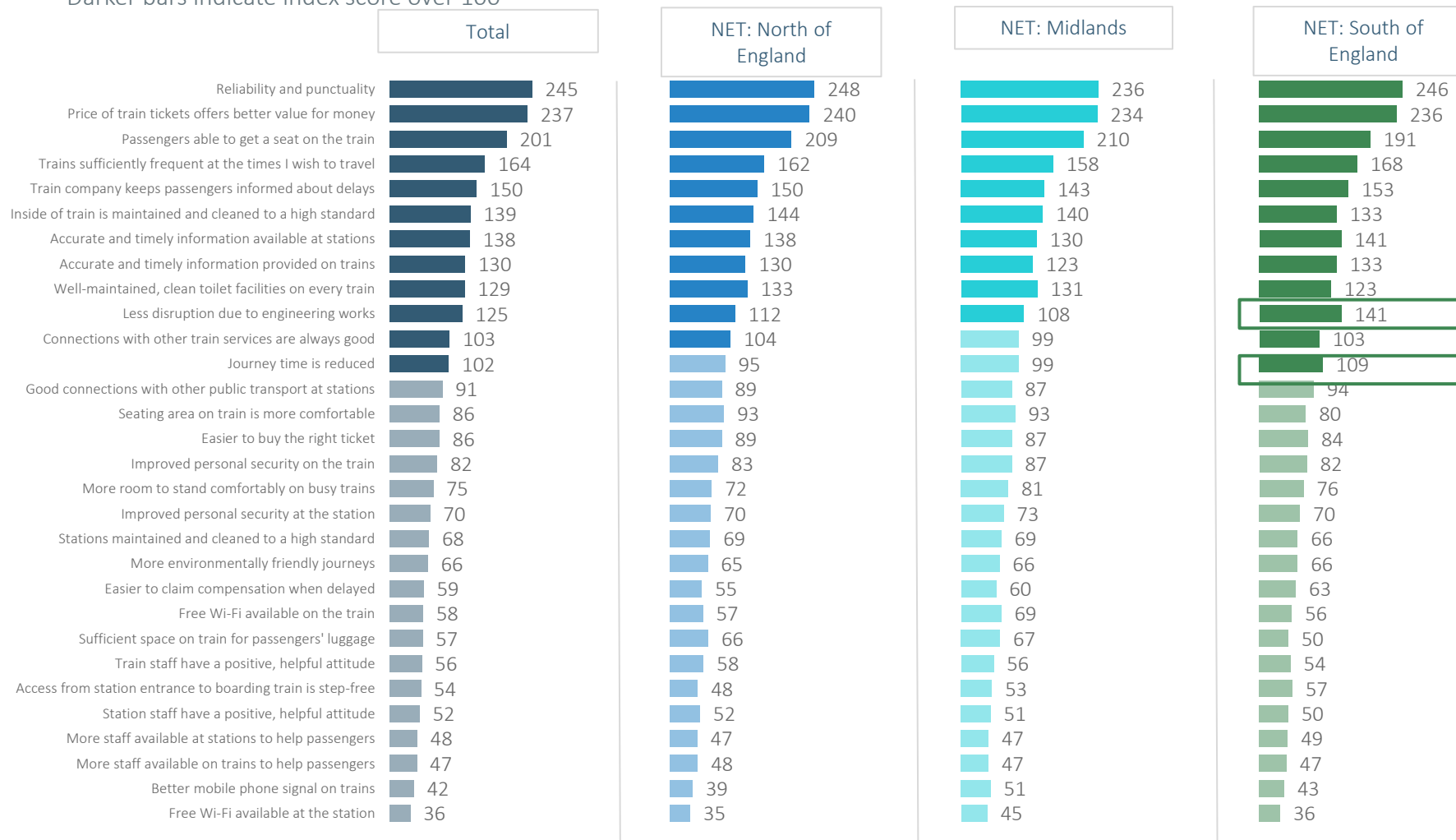
Darker bars indicate index score over 100



# Reduced engineering disruption and reduced journey times are greater priorities among passengers living in the South, compared to other areas of England

Improvement priorities by English Region [index]

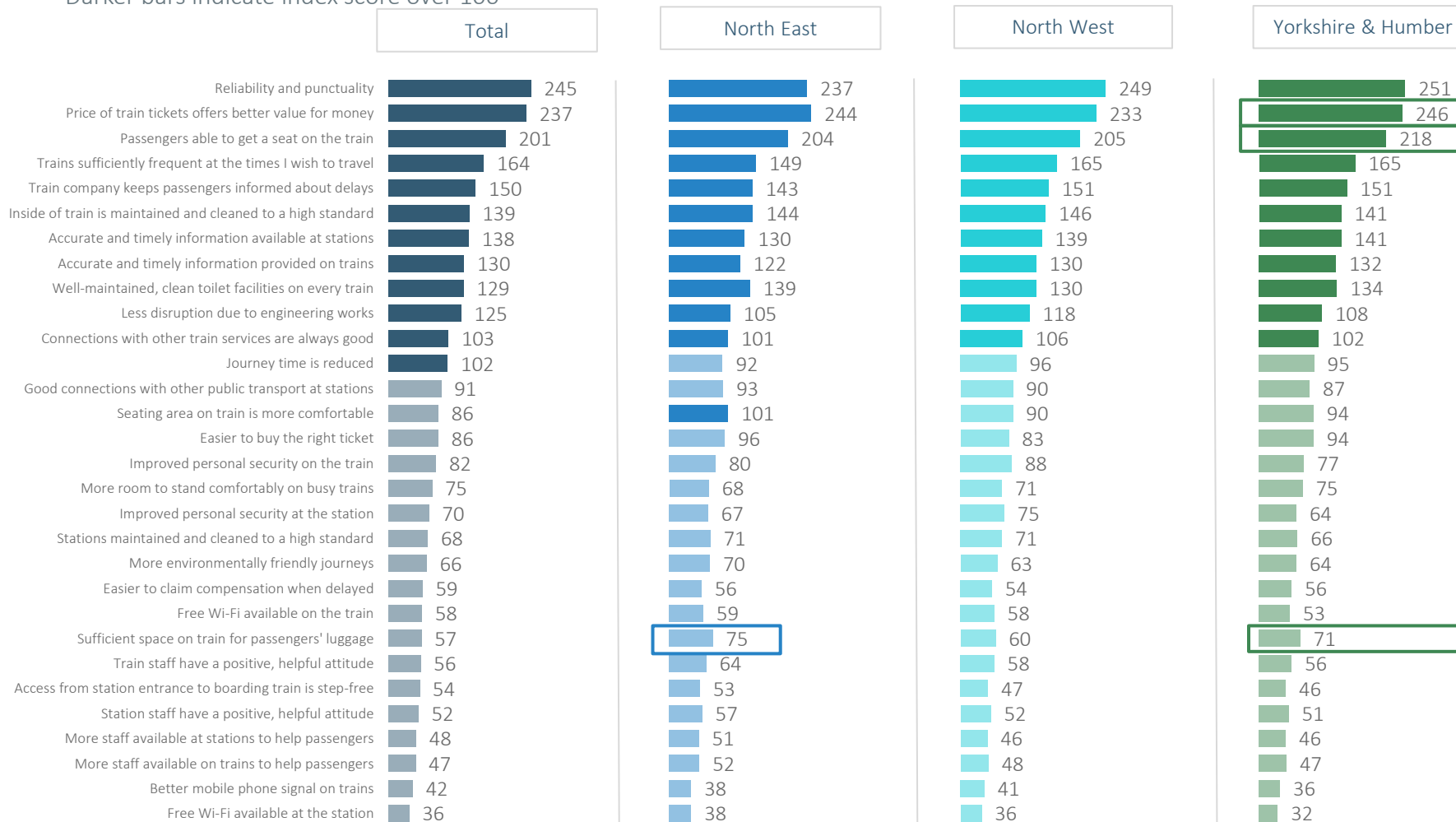
Darker bars indicate index score over 100



# Passengers in Yorkshire and the Humber express greater concern over value for money and seating availability

Improvement priorities by English Region [index]

Darker bars indicate index score over 100

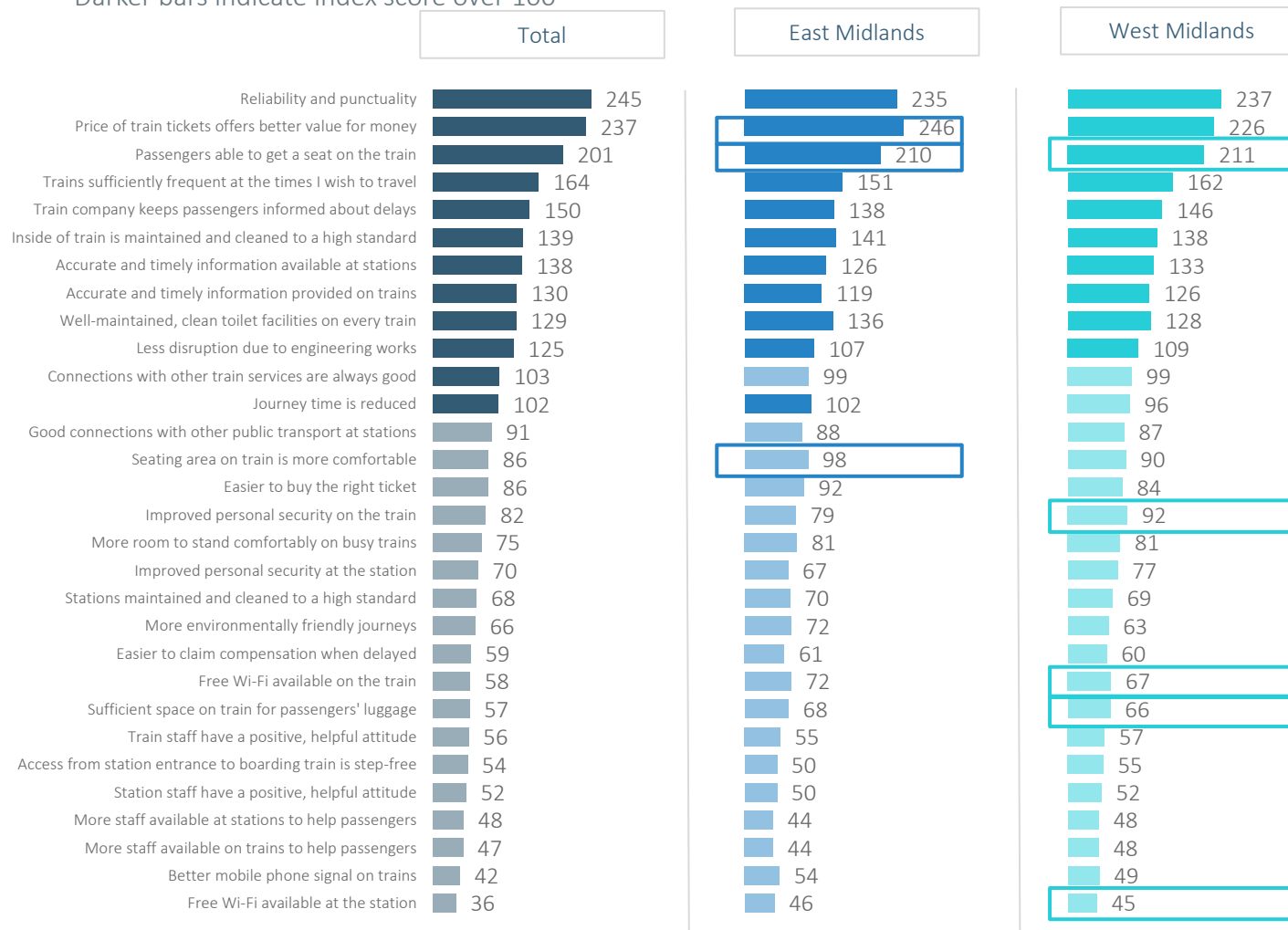




# Passengers in the Midlands prioritise availability and comfort of seats over the wider passenger population. For East Midlands passengers, value for money is key whereas West Midlands passengers have a range of concerns

## Improvement priorities by English Region [index]

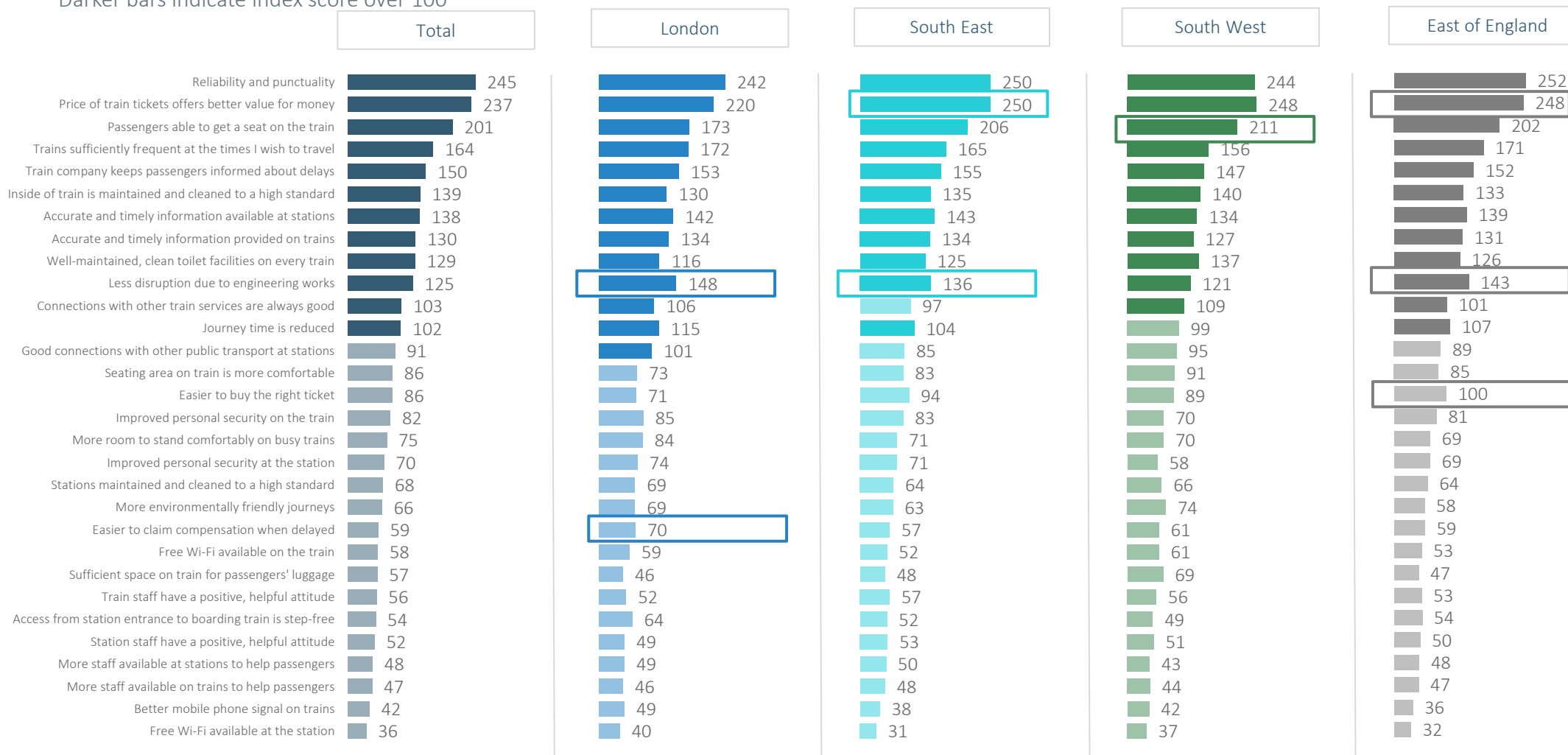
Darker bars indicate index score over 100



# Less disruption due to engineering works is a key improvement area in London, the South East and the East of England. Getting better value for train tickets is more important to those in the South East

Improvement priorities by English Region [index]

Darker bars indicate index score over 100



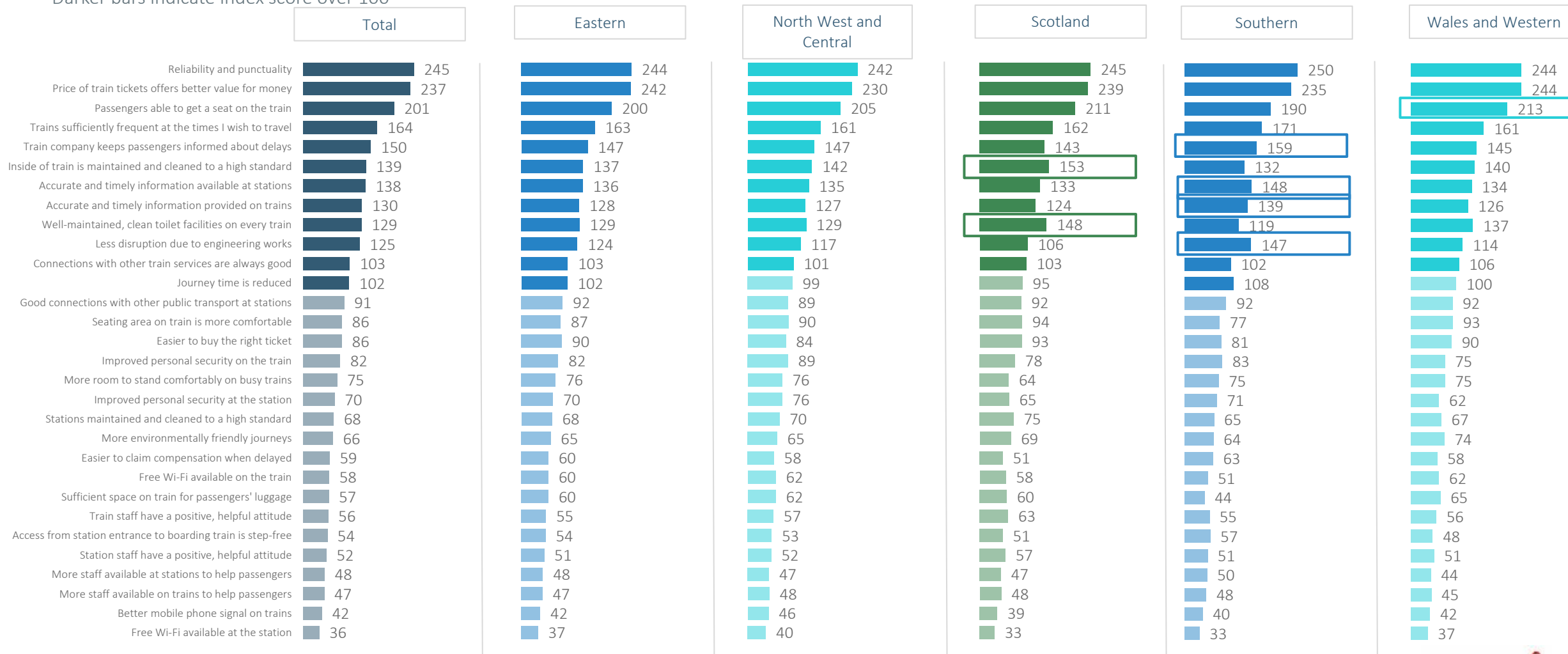
# Priorities by Network Rail Region / Route

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# Passengers on the Wales and Western route more often mention the on-train experience as a priority, whereas delays and disruption are particularly pressing for those on the Southern route

Improvement priorities by All NR Regions [index]

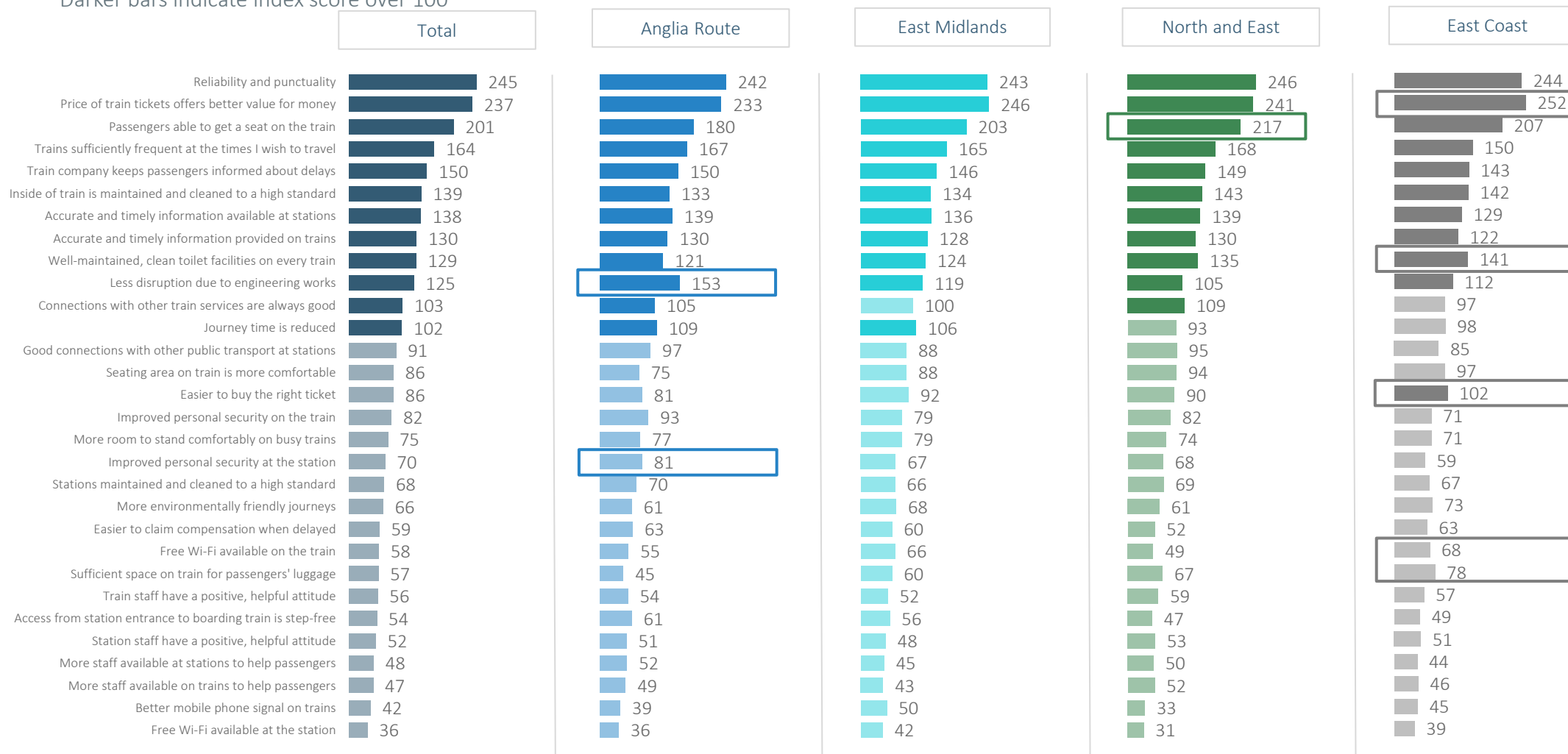
Darker bars indicate index score over 100



# Less engineering work would be particularly welcomed by Anglia route passengers. North and East passengers value seats, and East Coast want value for money

Improvement priorities by NR Region – Eastern [index]

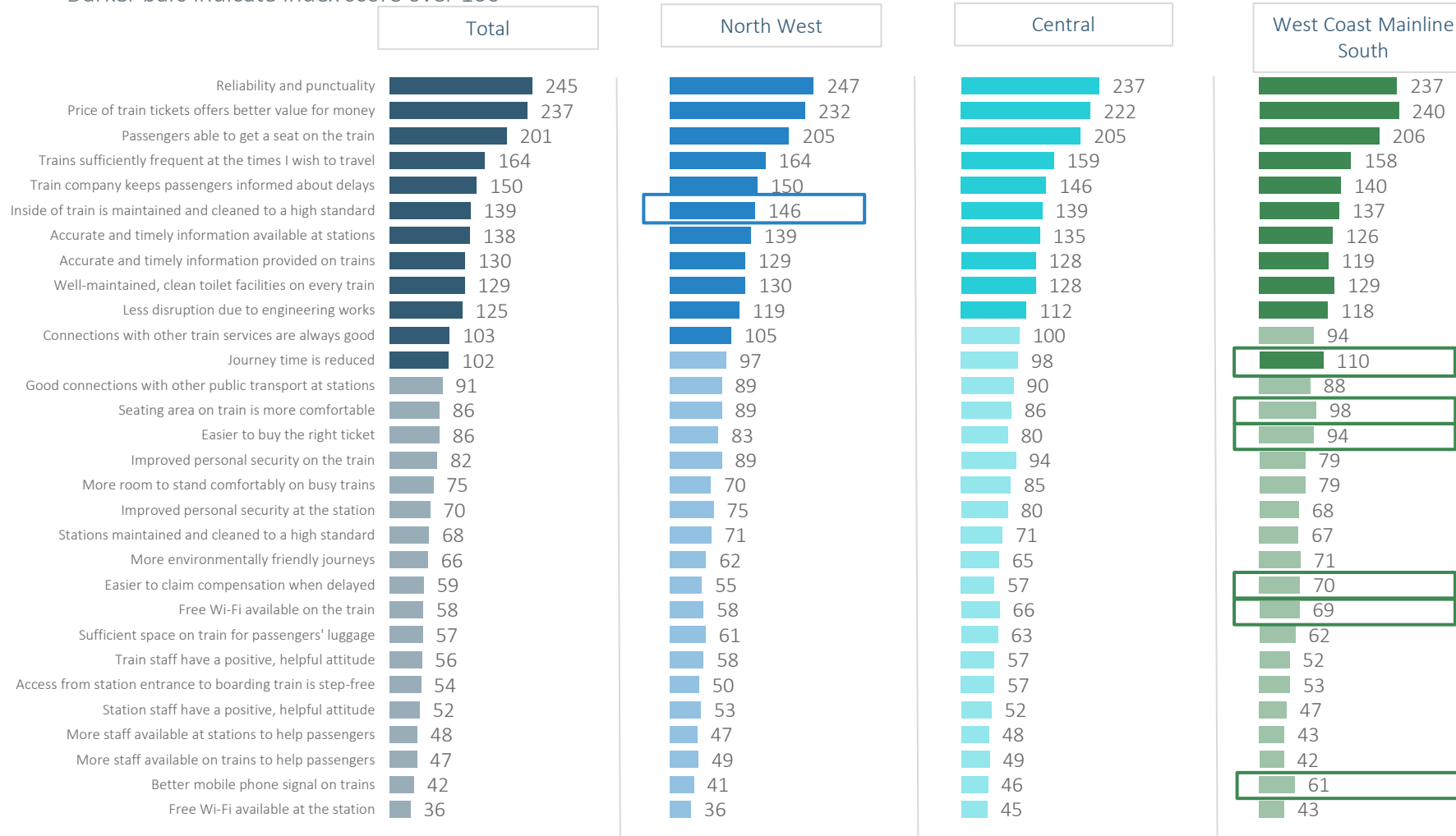
Darker bars indicate index score over 100



# Journey time is a bigger concern for those on the West Coast Mainline South route, while cleanliness features more prominently for North West passengers

Improvement priorities by NR Region - North West and Central [index]

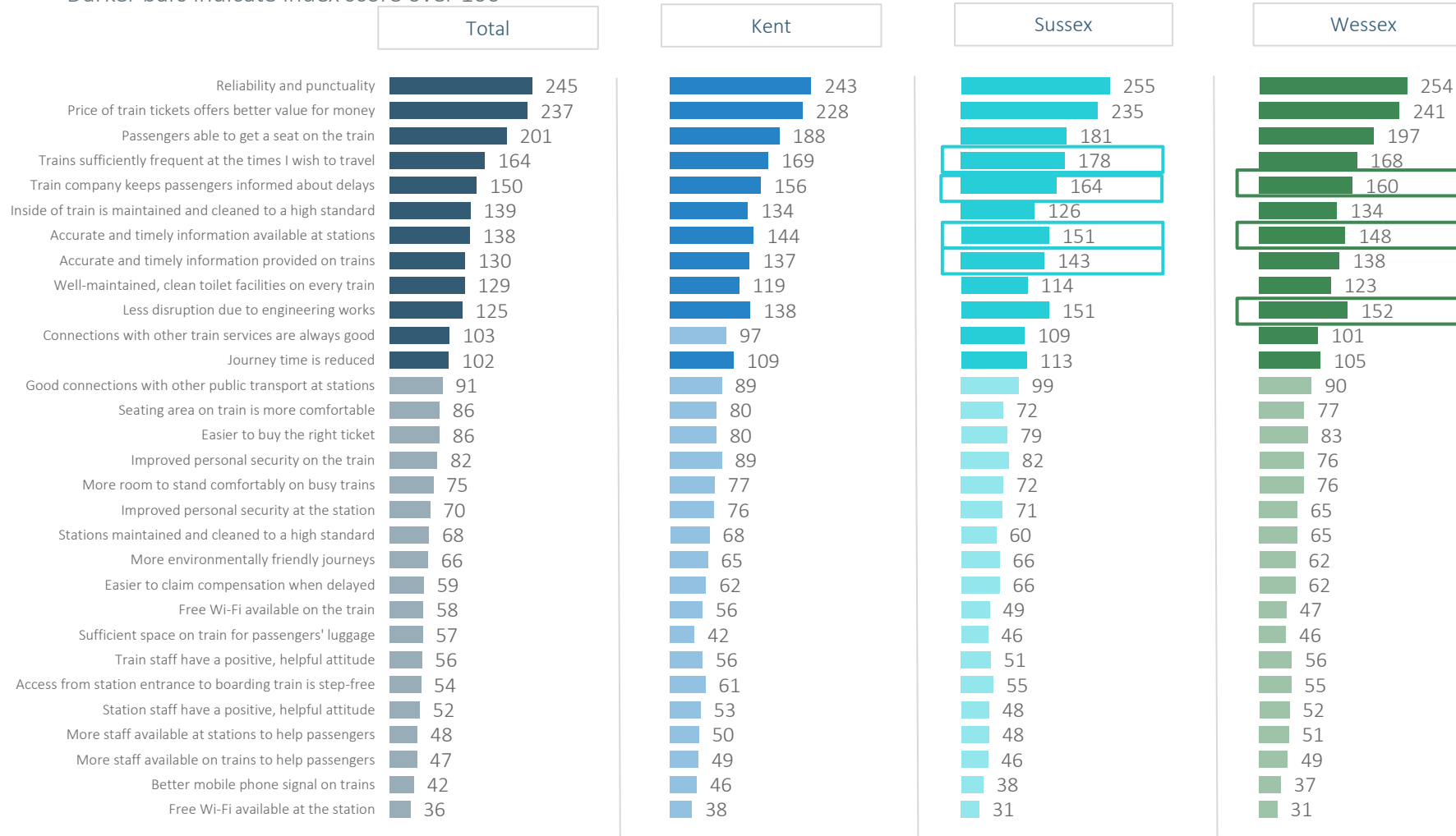
Darker bars indicate index score over 100



# Compared to all passengers, Sussex passengers want frequent train services. Both Sussex and Wessex are more likely to want train companies to keep them informed about delays

Improvement priorities by NR Region - Southern [index]

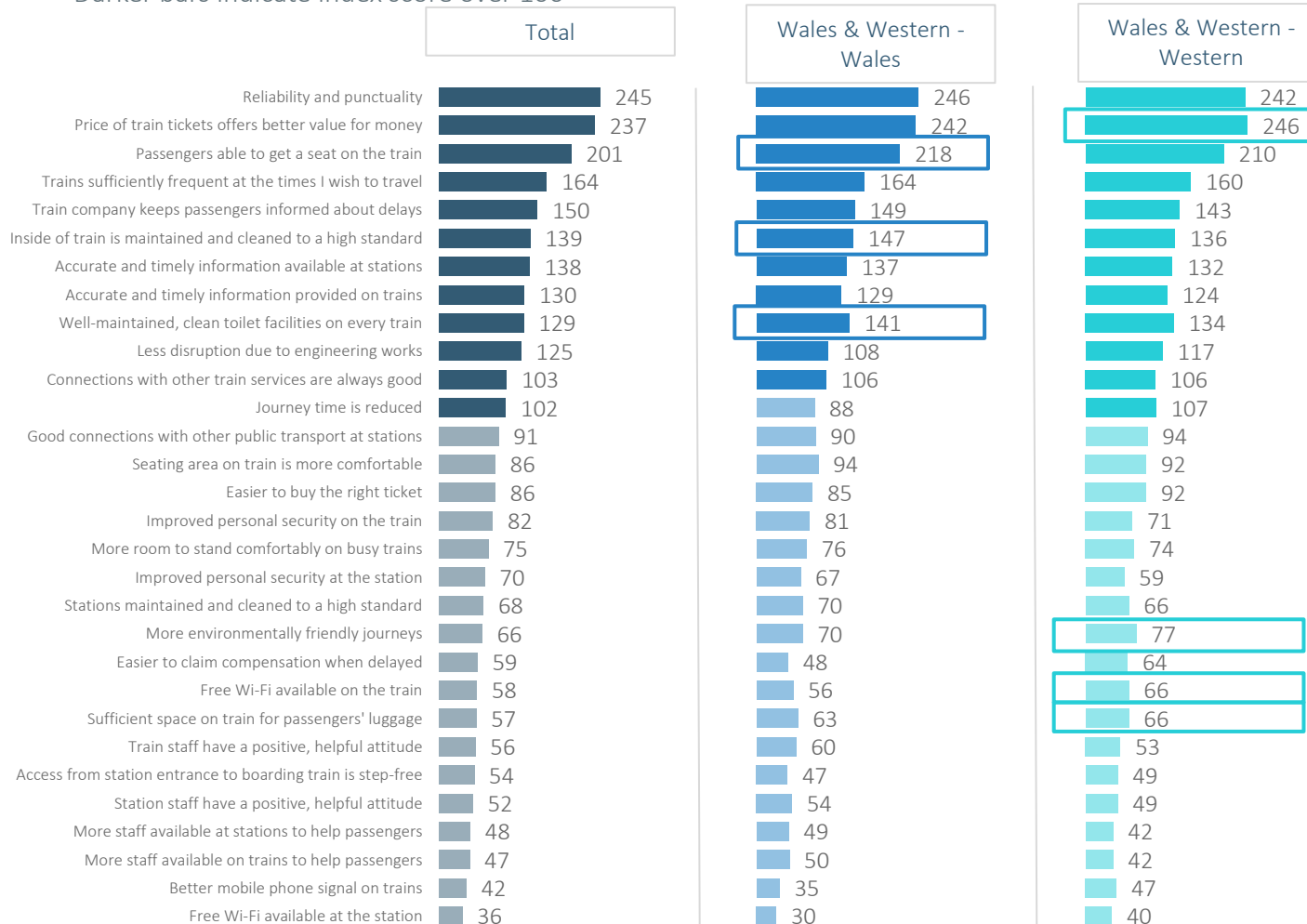
Darker bars indicate index score over 100



# Getting a seat is more prominent for Wales route passengers, while value for money features most strongly for Western route passengers

Improvement priorities by NR Region – Wales and Western [index]

Darker bars indicate index score over 100





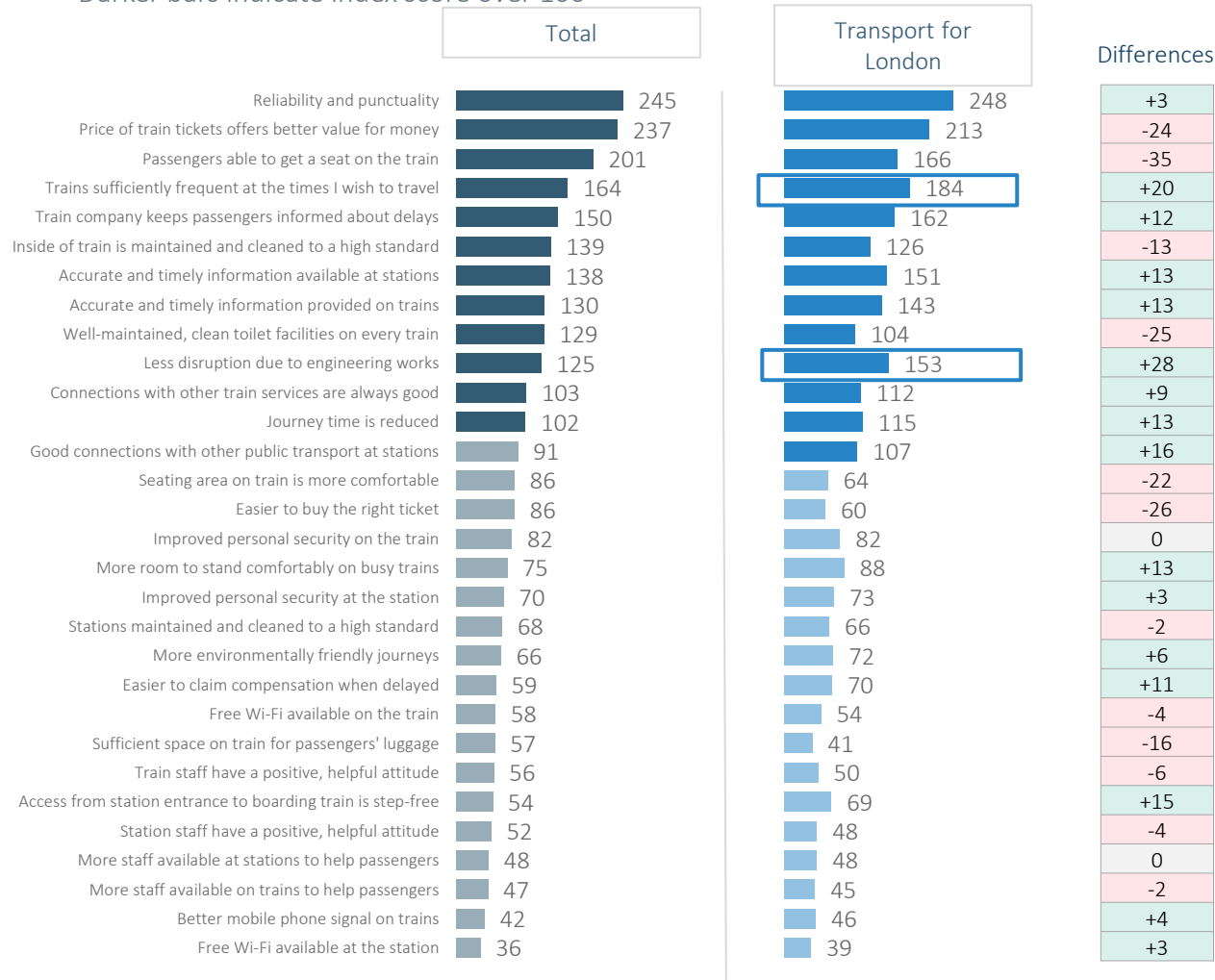
# Priorities by Regional Administration

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# Top rated improvement priorities look slightly different for those covered by the Transport for London area. Here, train frequency and engineering disruption are among the primary concerns

Improvement priorities by Transport for London passengers [index]

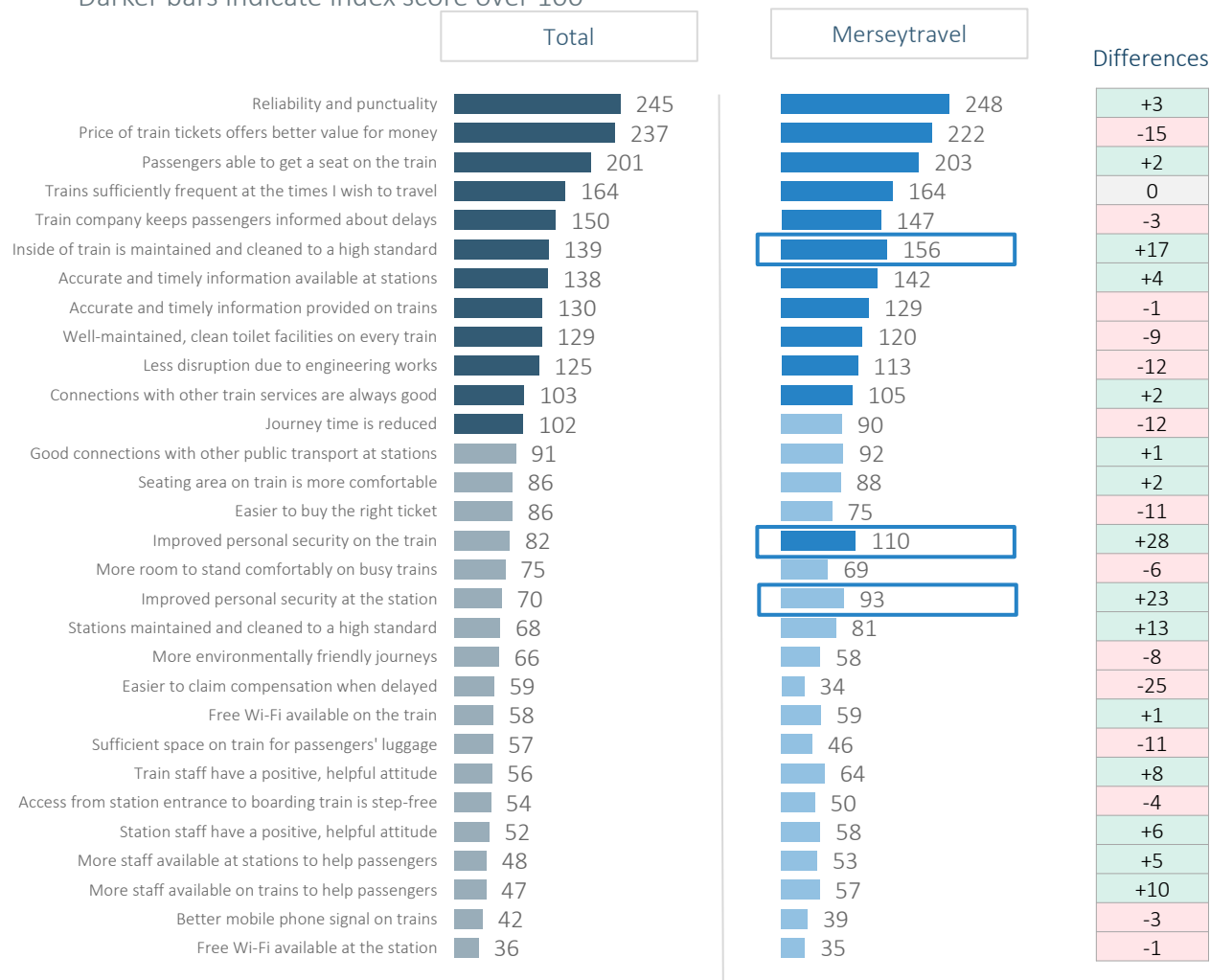
Darker bars indicate index score over 100



# Improved security and cleanliness inside trains are more important priorities for the Merseytravel area compared to passengers in general

Improvement priorities by Merseytravel passengers [index]

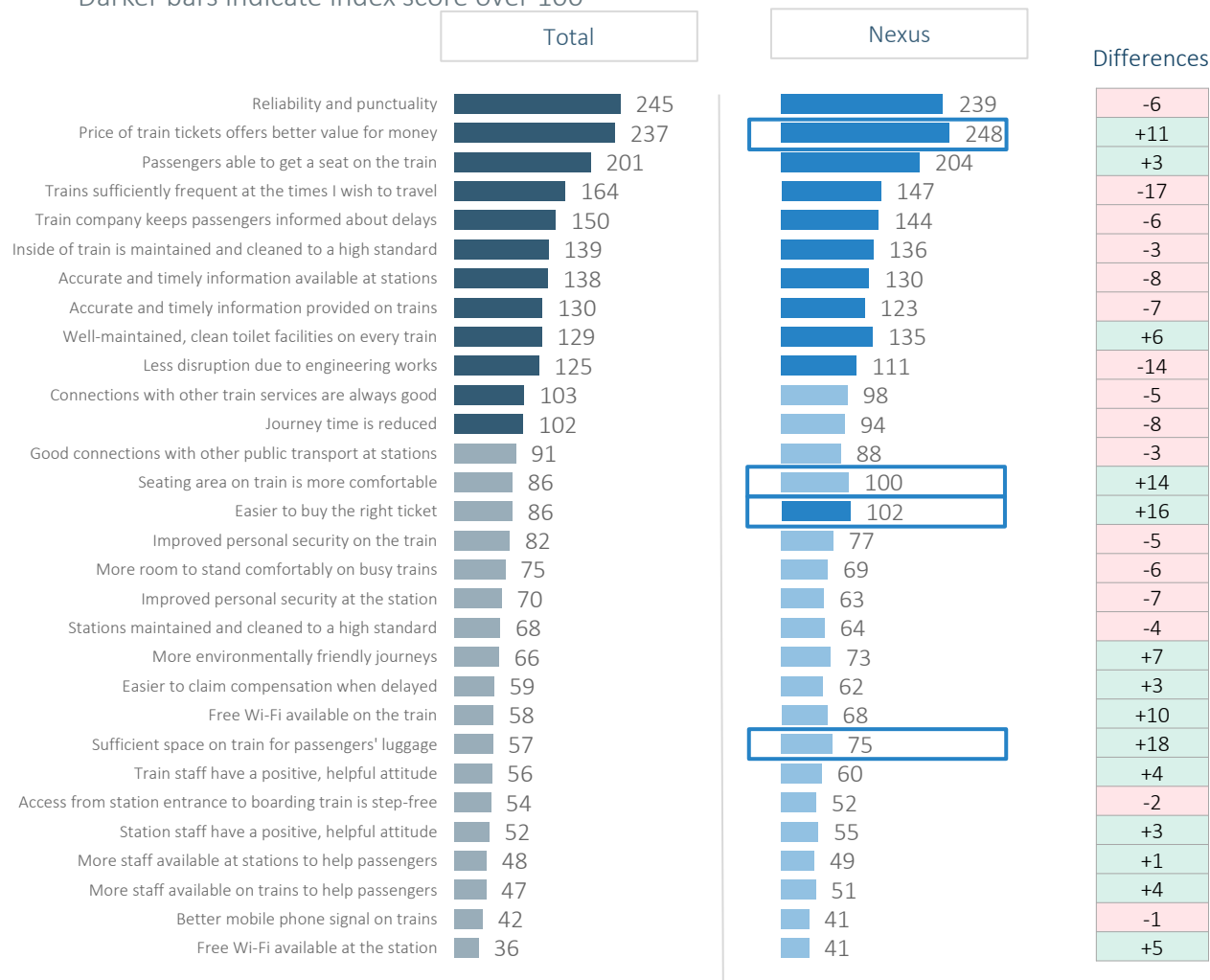
Darker bars indicate index score over 100



# Value for money is the top priority for passengers covered by the Nexus area, who also have greater concern over luggage space and ease of buying the right ticket

Improvement priorities by Nexus / Transport for Tyne and Wear passengers [index]

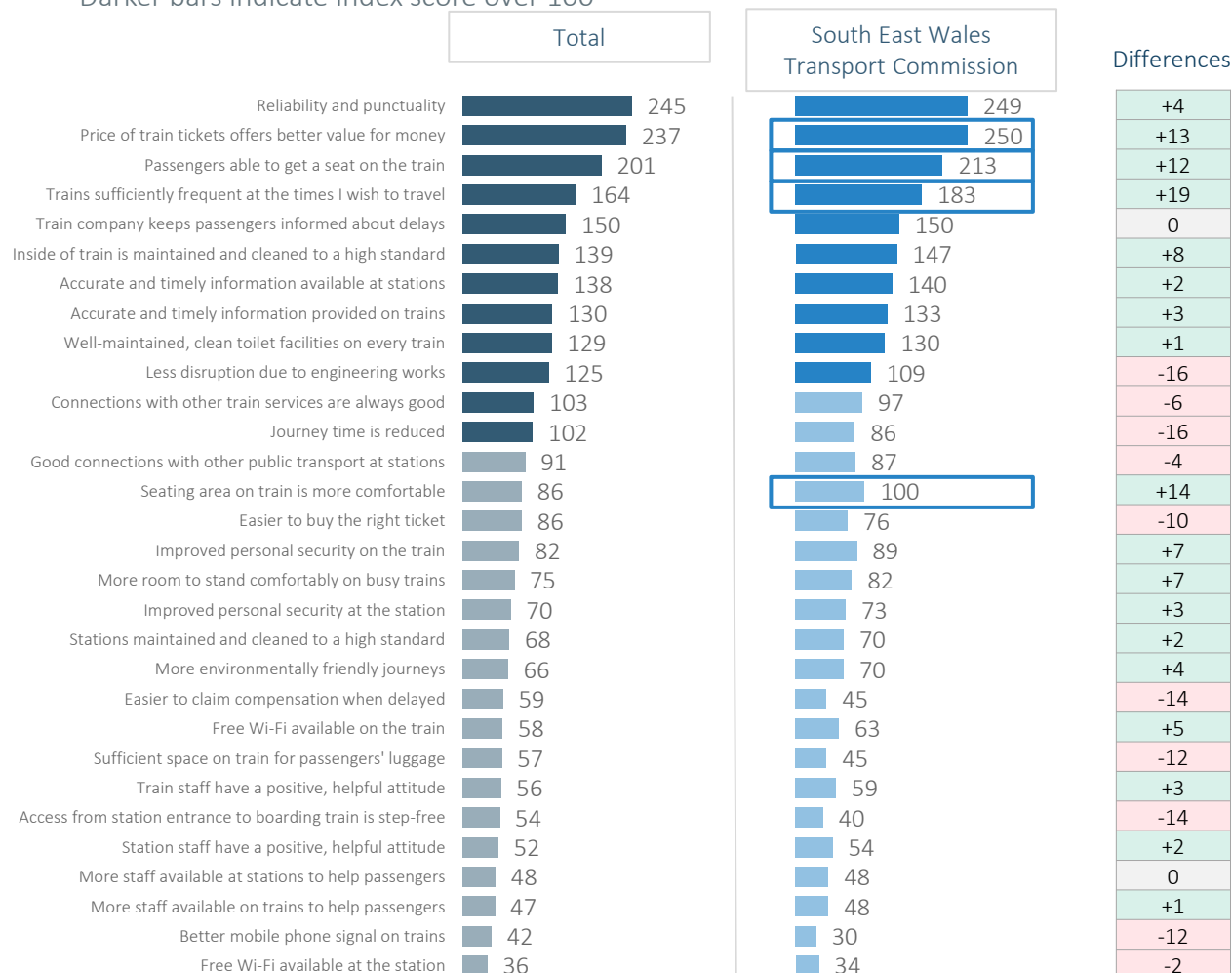
Darker bars indicate index score over 100



# Frequency of trains, value for money and seat availability/comfort are of particular importance for passengers in the South East Wales Transport Commission area

Improvement priorities by South East Wales Transport Commission passengers [index]

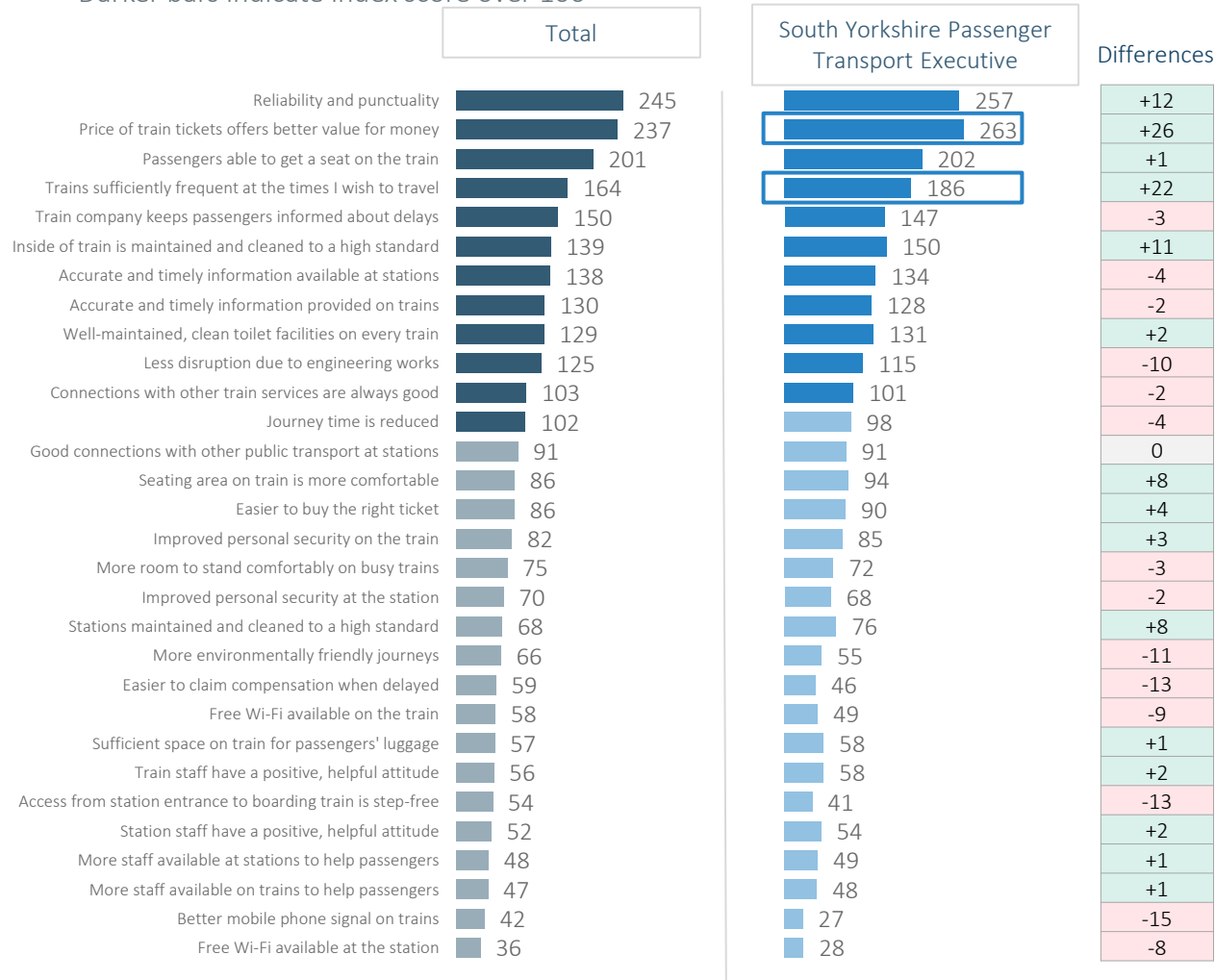
Darker bars indicate index score over 100



# Value for money and frequency of trains are mentioned as particularly key priorities for passengers in the South Yorkshire Passenger Transport Executive area

Improvement priorities by South Yorkshire Passenger Transport Executive passengers [index]

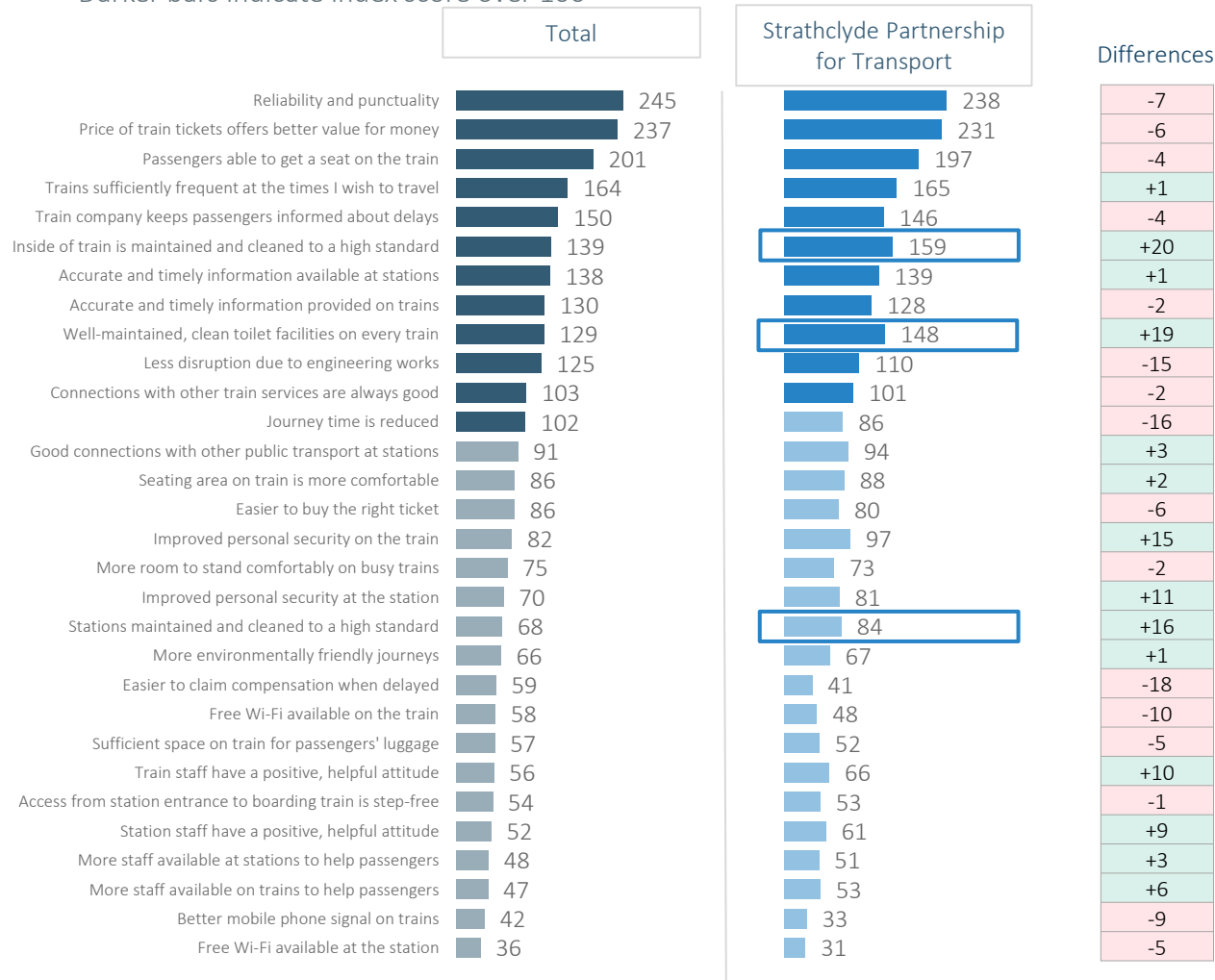
Darker bars indicate index score over 100



# Improved cleanliness a particular priority both at stations and on trains for passengers in the Strathclyde Partnership for Transport area

Improvement priorities by Strathclyde Partnership for Transport passengers [index]

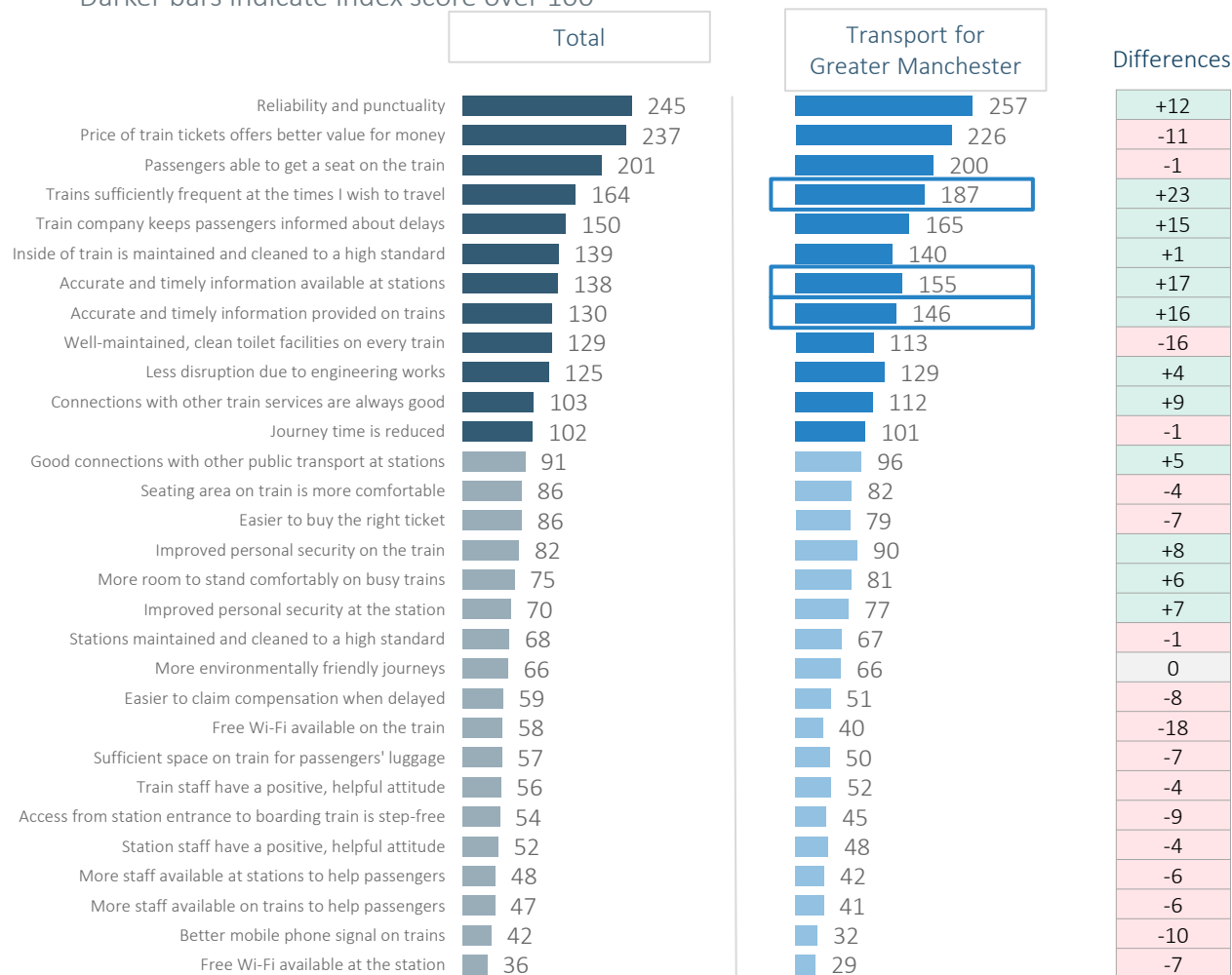
Darker bars indicate index score over 100



Cleanliness as a priority follows the same trend observed in Scotland as a nation, where cleanliness inside the train (153), for toilet facilities (148) and at stations (76) are seen as more of a priority than for GB overall.

# Particular priorities for Transport for Greater Manchester area centre around the availability and accuracy of information, and frequency of trains

Improvement priorities by Transport for Greater Manchester passengers [index]  
Darker bars indicate index score over 100

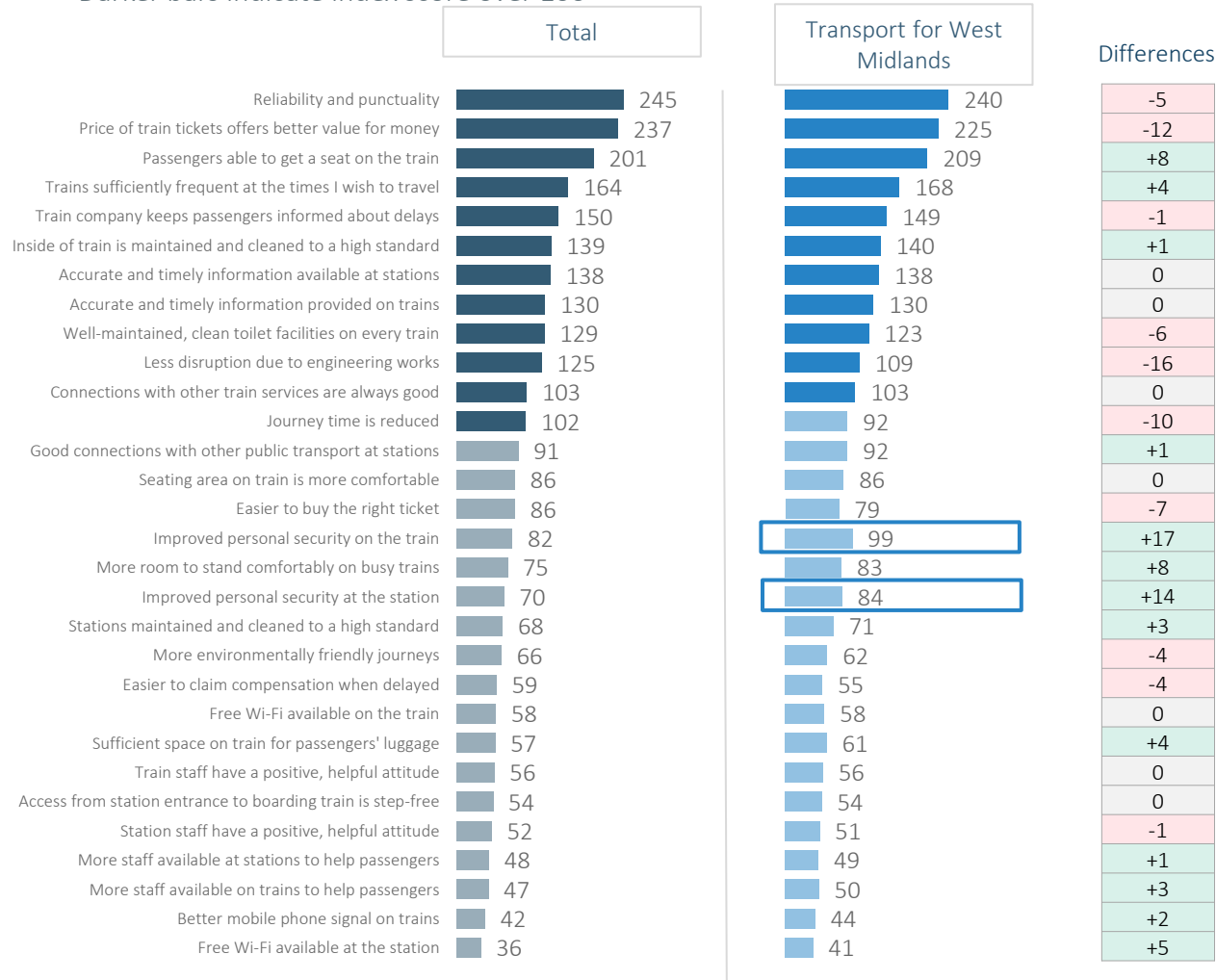




# Although key rail priorities are in line with the total passenger population, personal security both on trains and at stations is a more significant concern for passengers in the Transport for West Midlands area

Improvement priorities by Transport for West Midlands passengers [index]

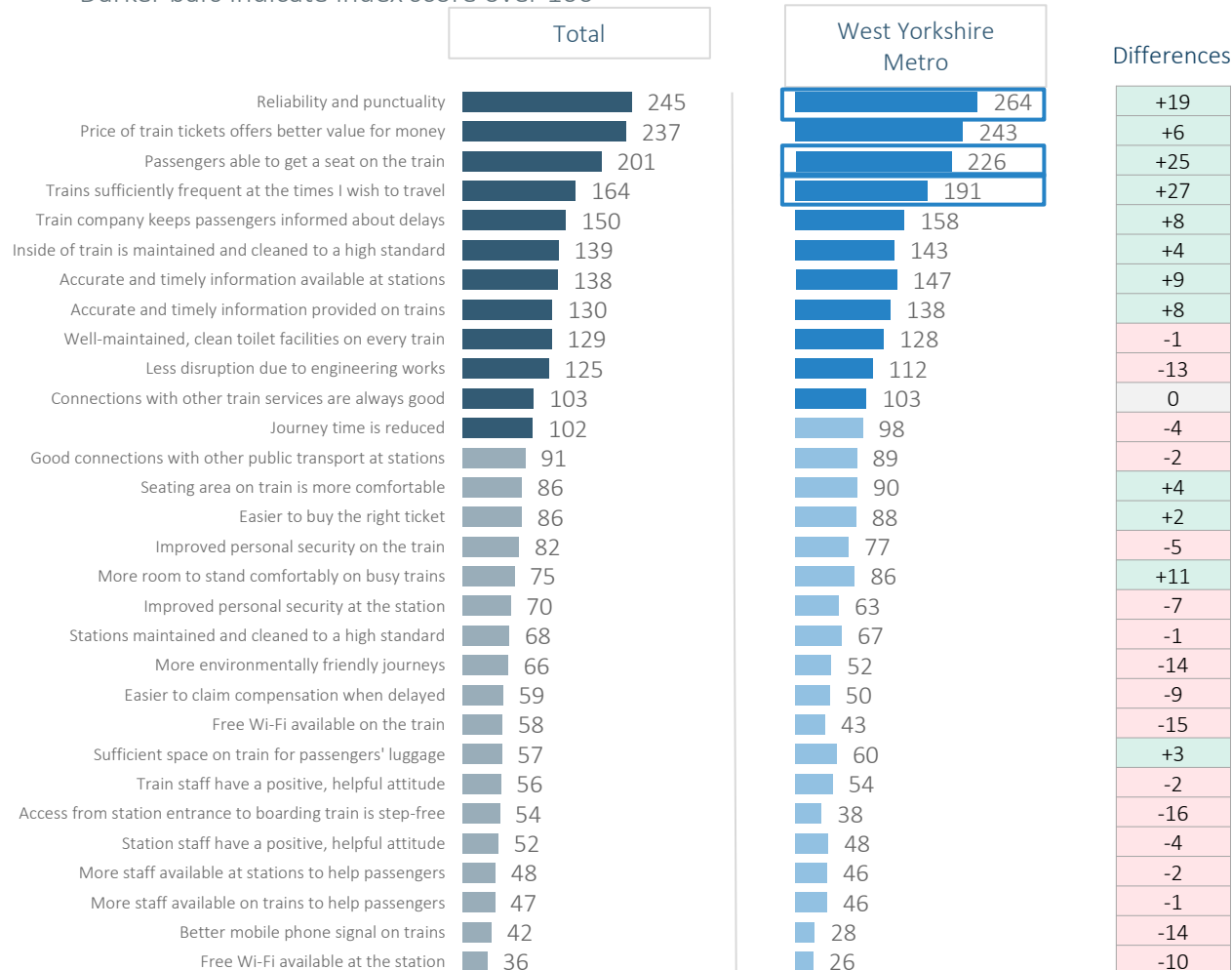
Darker bars indicate index score over 100



# Priorities for West Yorkshire Metro area passengers are aligned with all passengers, although seat availability and train frequency/reliability/punctuality are particular areas of concern

Improvement priorities by West Yorkshire Metro passengers [index]

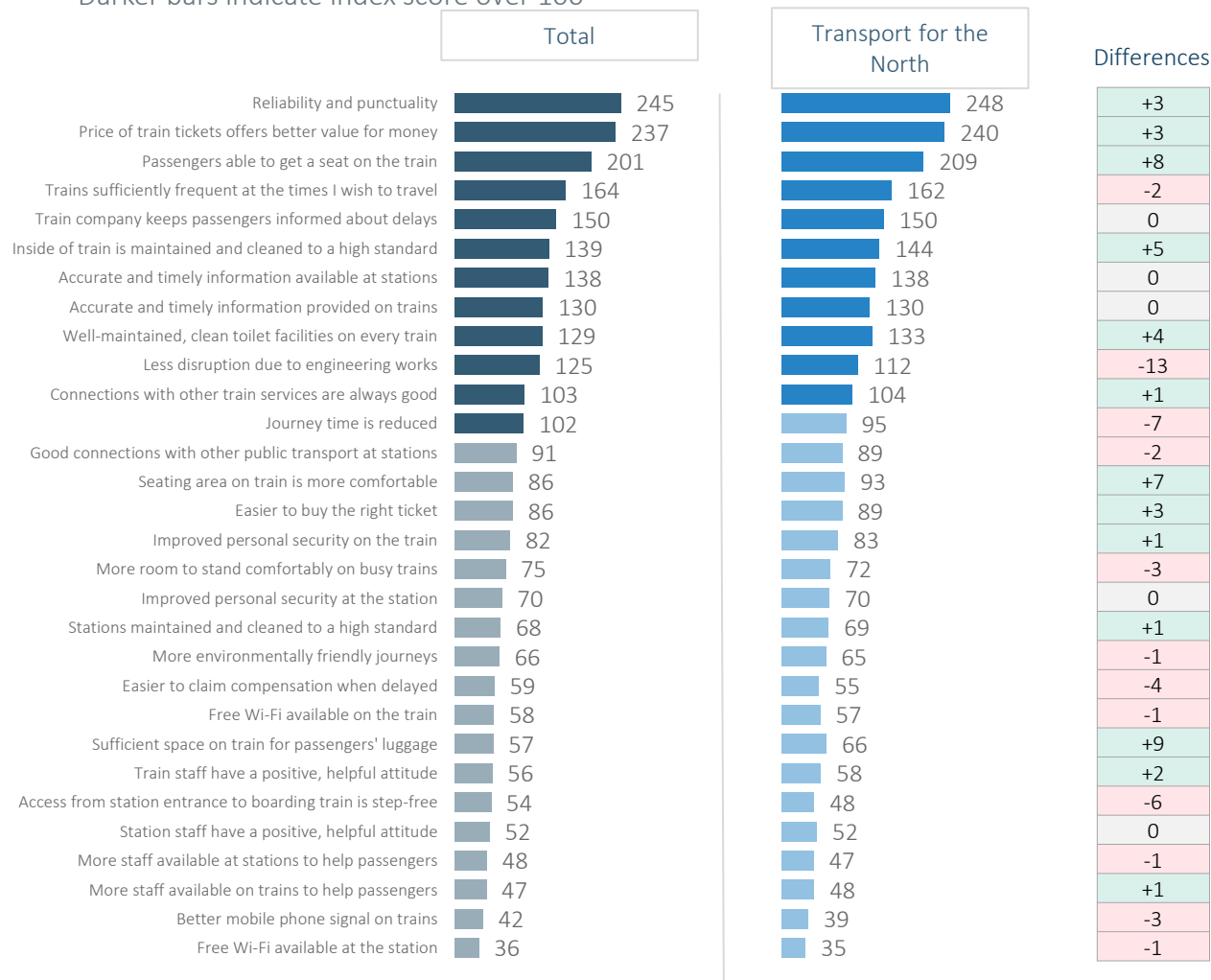
Darker bars indicate index score over 100



# There are no marked differences in key improvement priorities when comparing Transport for the North area with the wider passenger population

Improvement priorities by Transport for the North passengers [index]

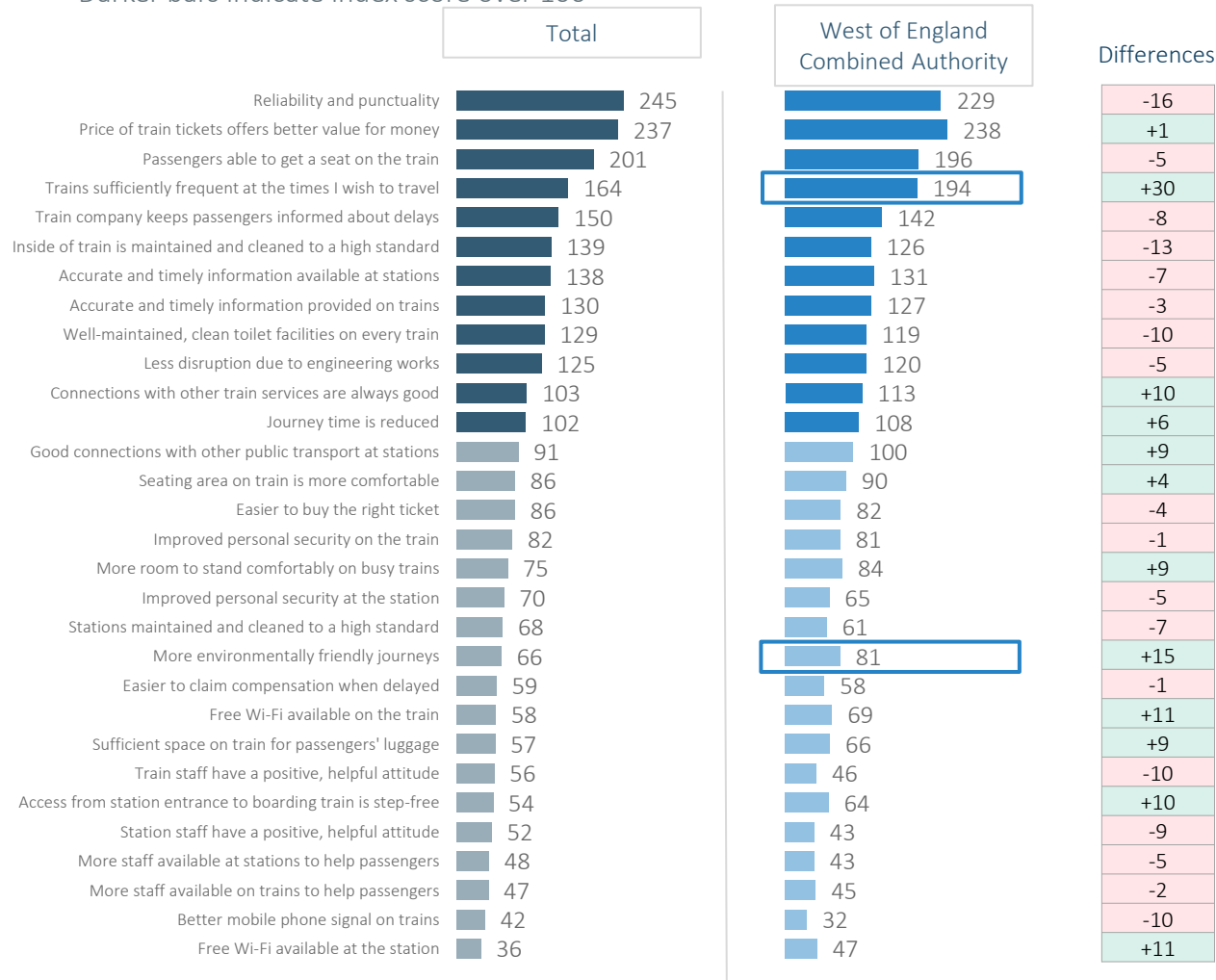
Darker bars indicate index score over 100



# Better value for money is the top priority for passengers covered by the West of England Combined Authority area. Train frequency is another significant area for improvement identified by passengers

Improvement priorities by West of England Combined Authority passengers [index]

Darker bars indicate index score over 100



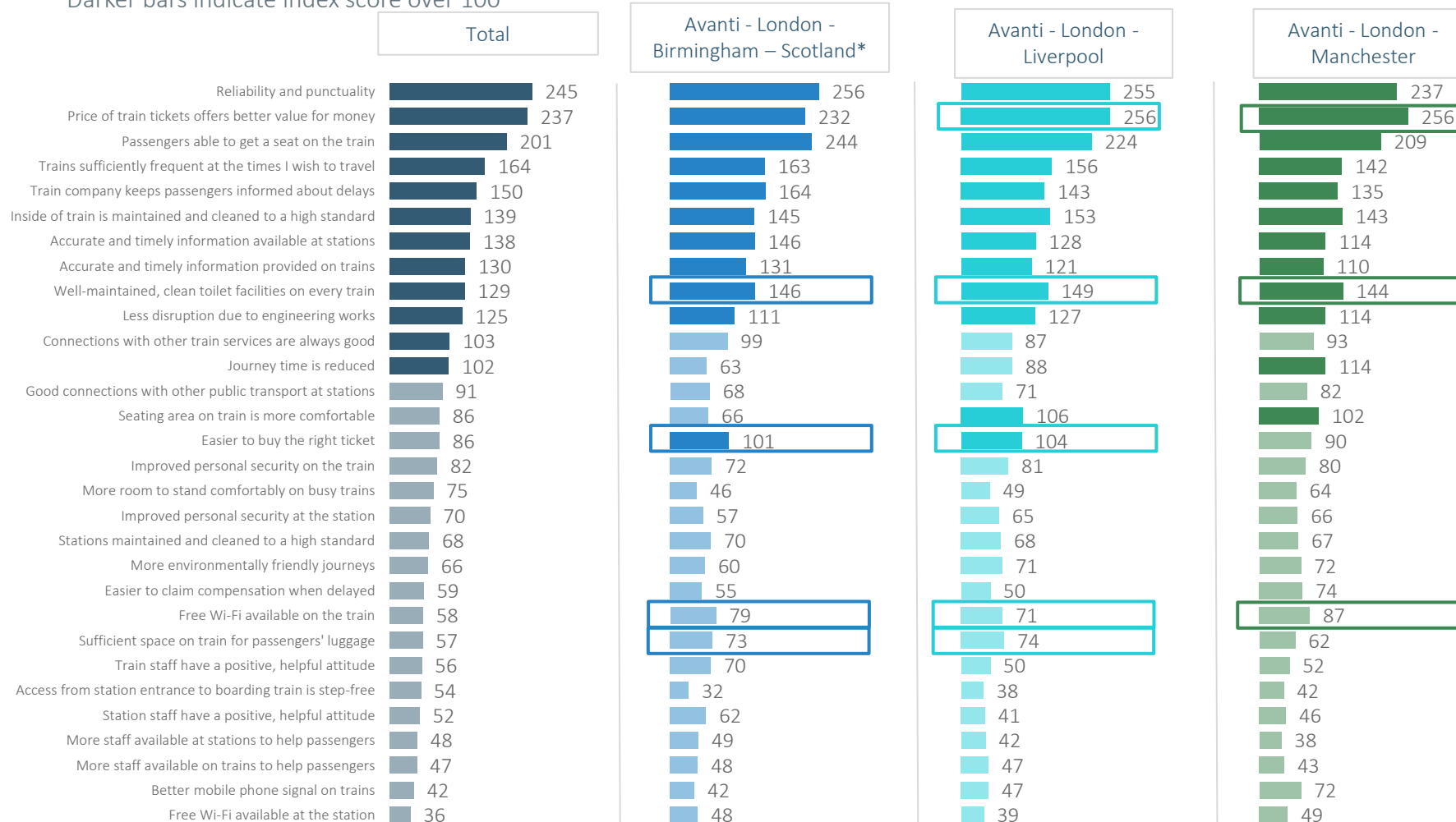
# Priorities by NRPS Building Blocks

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# Priorities by Avanti West Coast building block

Improvement priorities by NRPS Building Blocks [index]

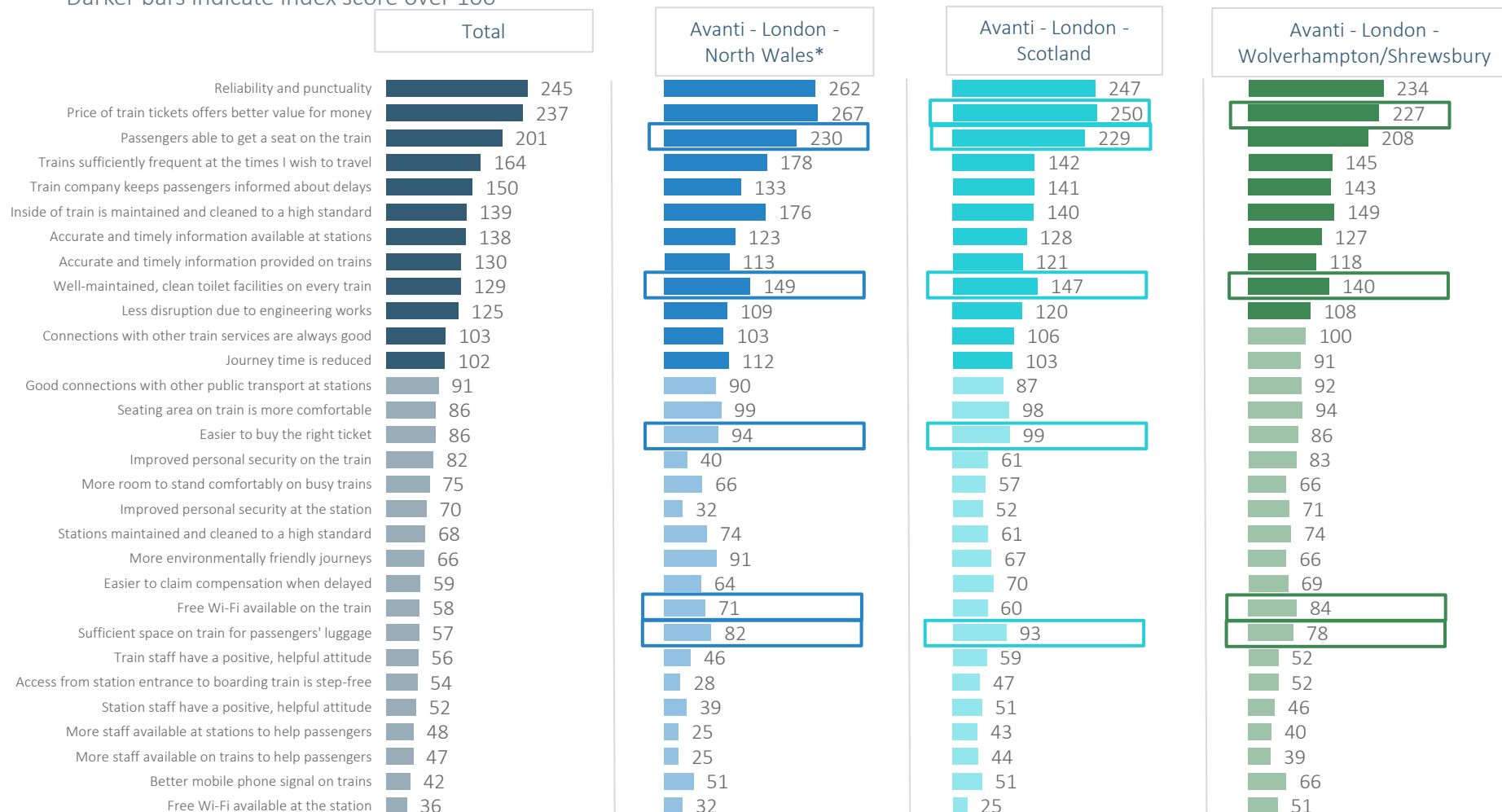
Darker bars indicate index score over 100



# Priorities by Avanti West Coast building block

Improvement priorities by NRPS Building Blocks [index]

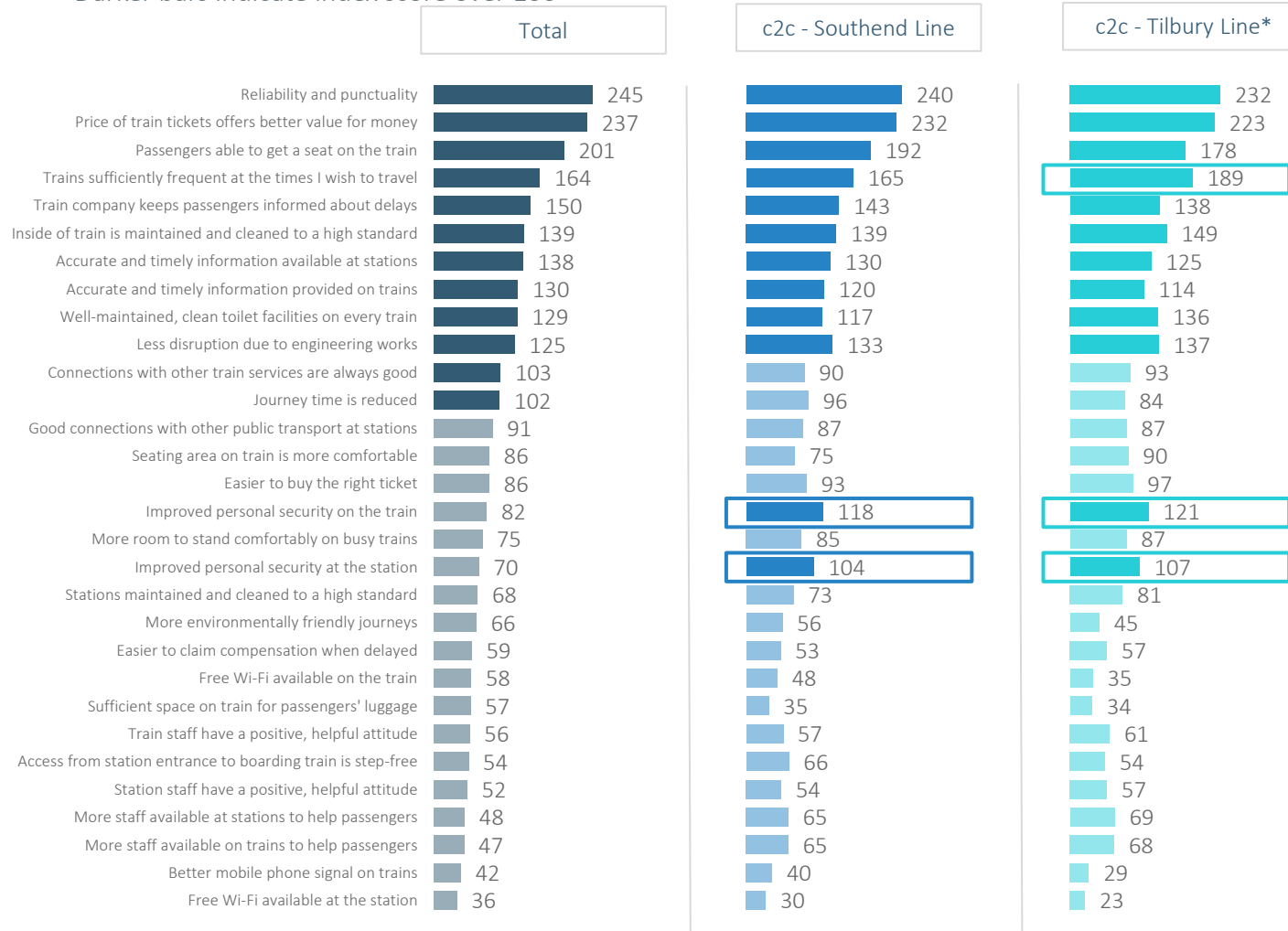
Darker bars indicate index score over 100



# Priorities by c2c building block

Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100

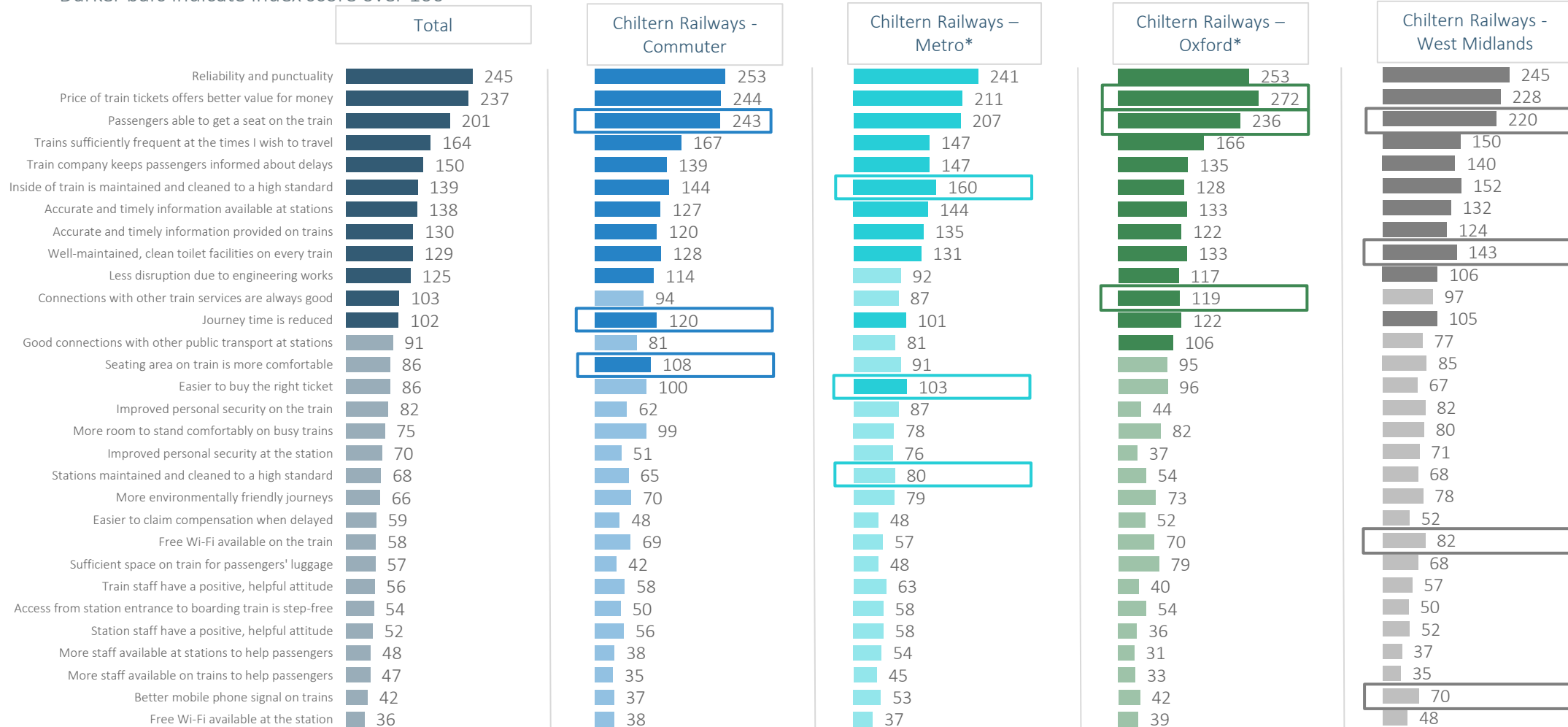




# Priorities by Chiltern Railways building block

Improvement priorities by NRPS Building Blocks [index]

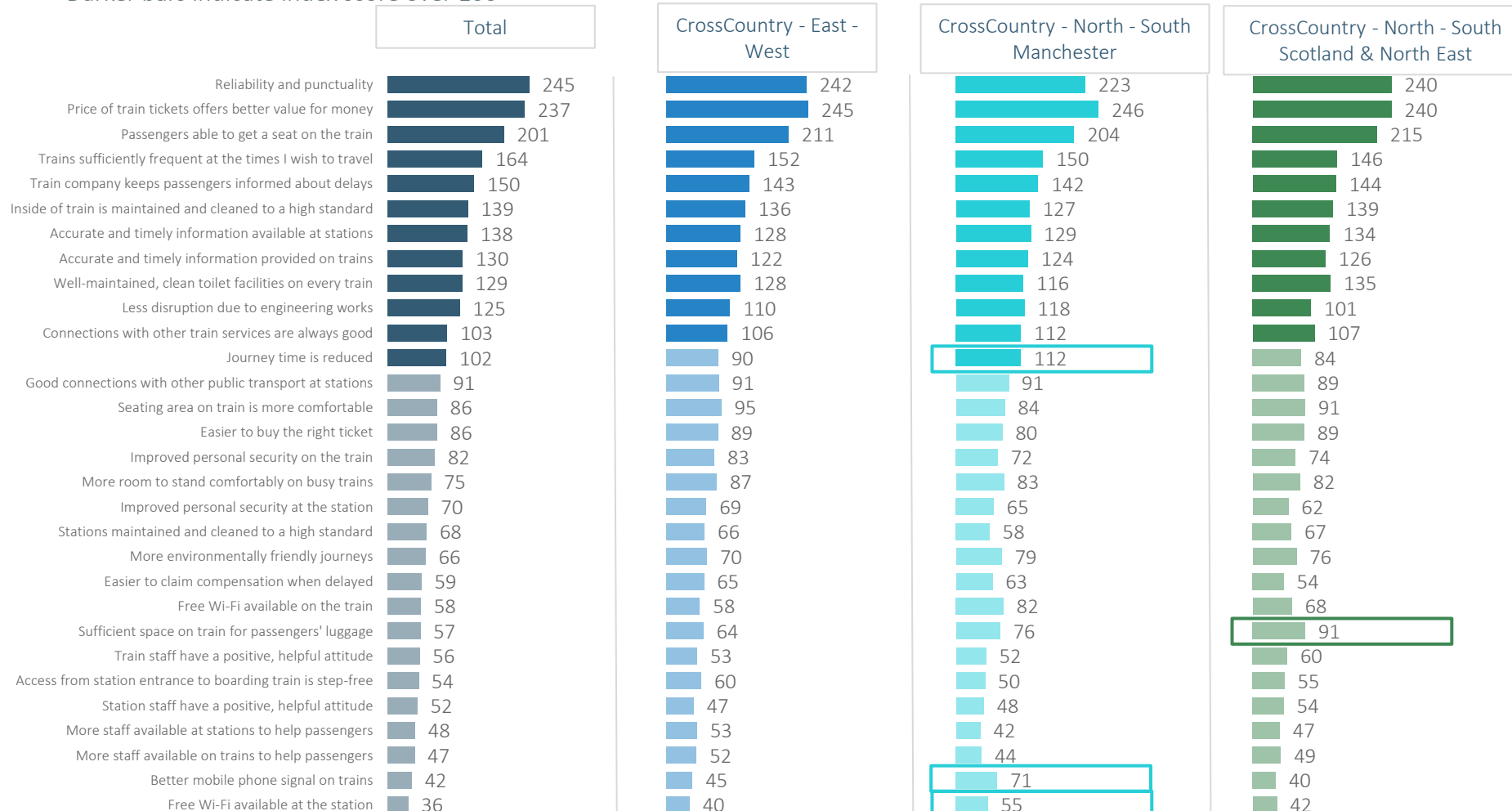
Darker bars indicate index score over 100



# Priorities by CrossCountry building block

Improvement priorities by NRPS Building Blocks [index]

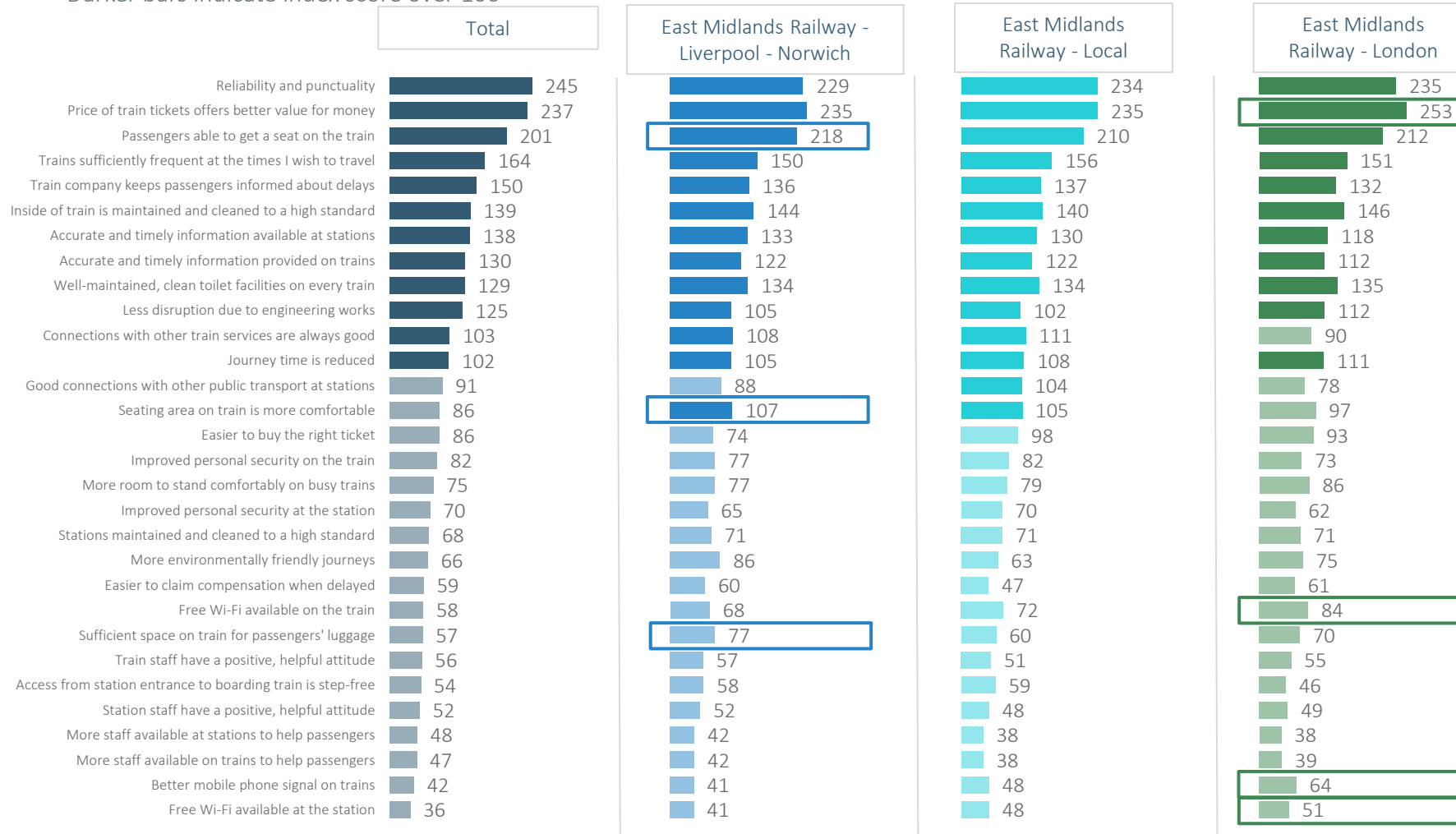
Darker bars indicate index score over 100



# Priorities by East Midlands Railway building block

Improvement priorities by NRPS Building Blocks [index]

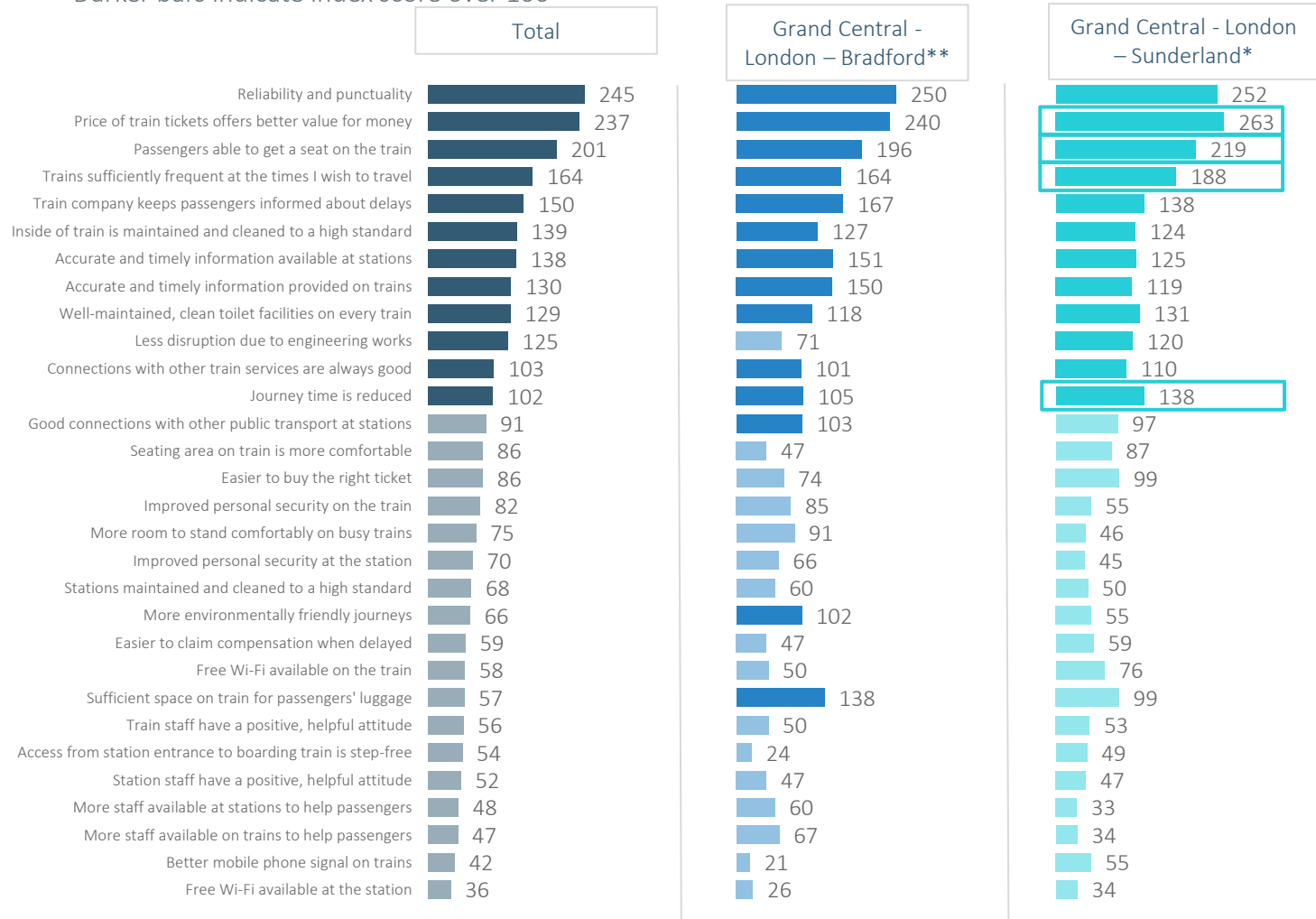
Darker bars indicate index score over 100



# Priorities by Grand Central building block

Improvement priorities by NRPS Building Blocks [index]

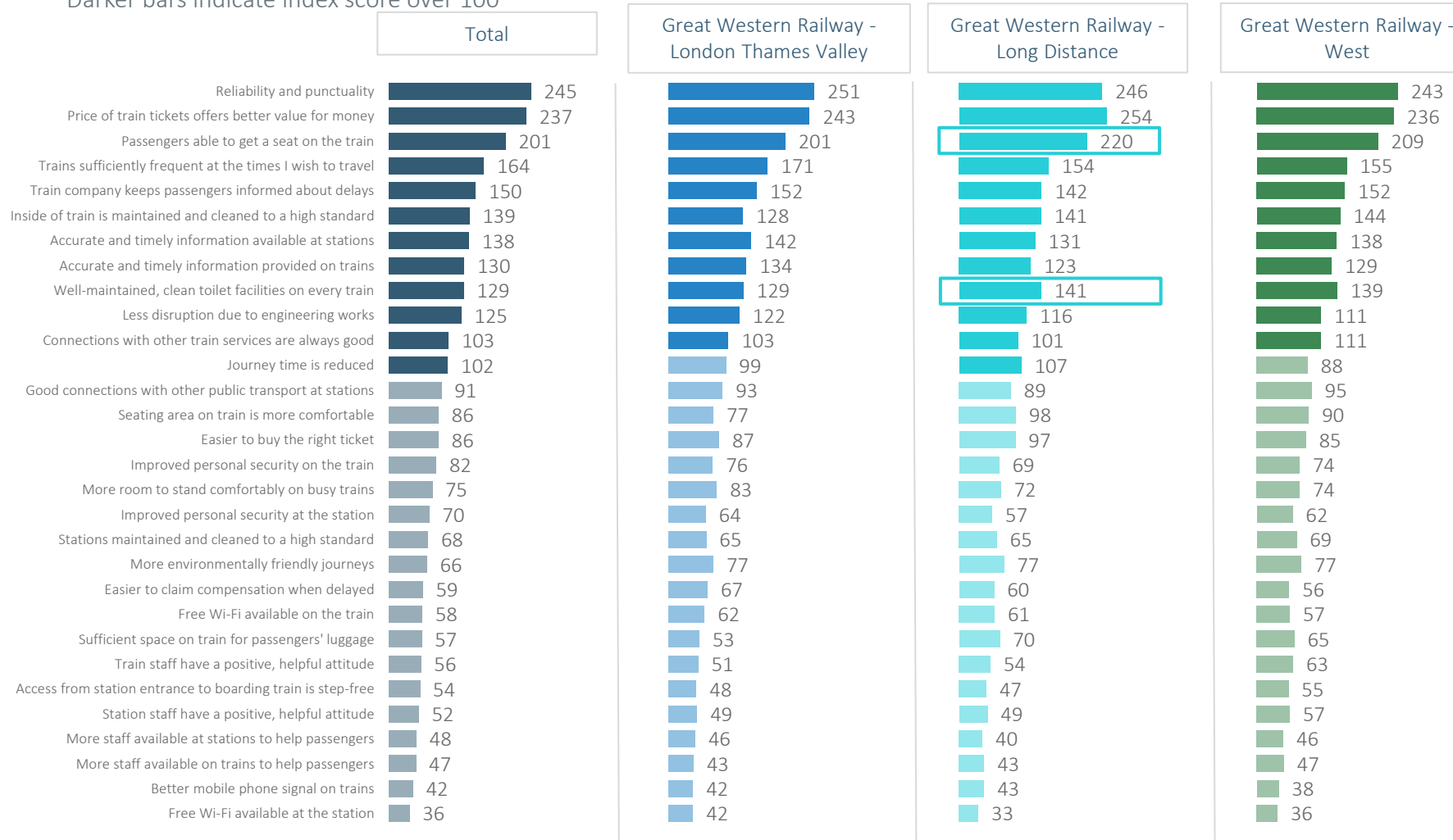
Darker bars indicate index score over 100



# Priorities by Great Western Railway building block

Improvement priorities by NRPS Building Blocks [index]

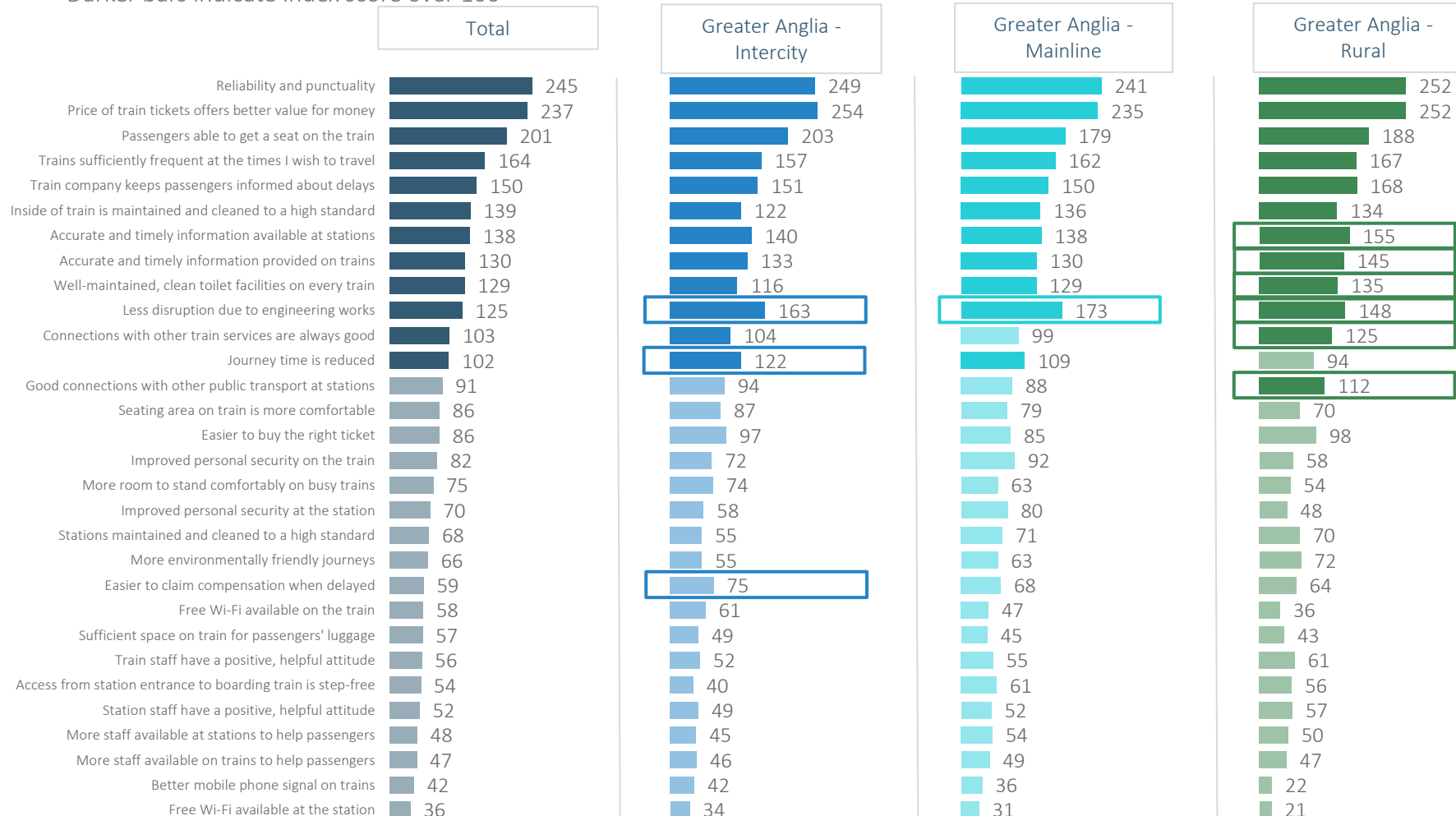
Darker bars indicate index score over 100



# Priorities by Greater Anglia building block

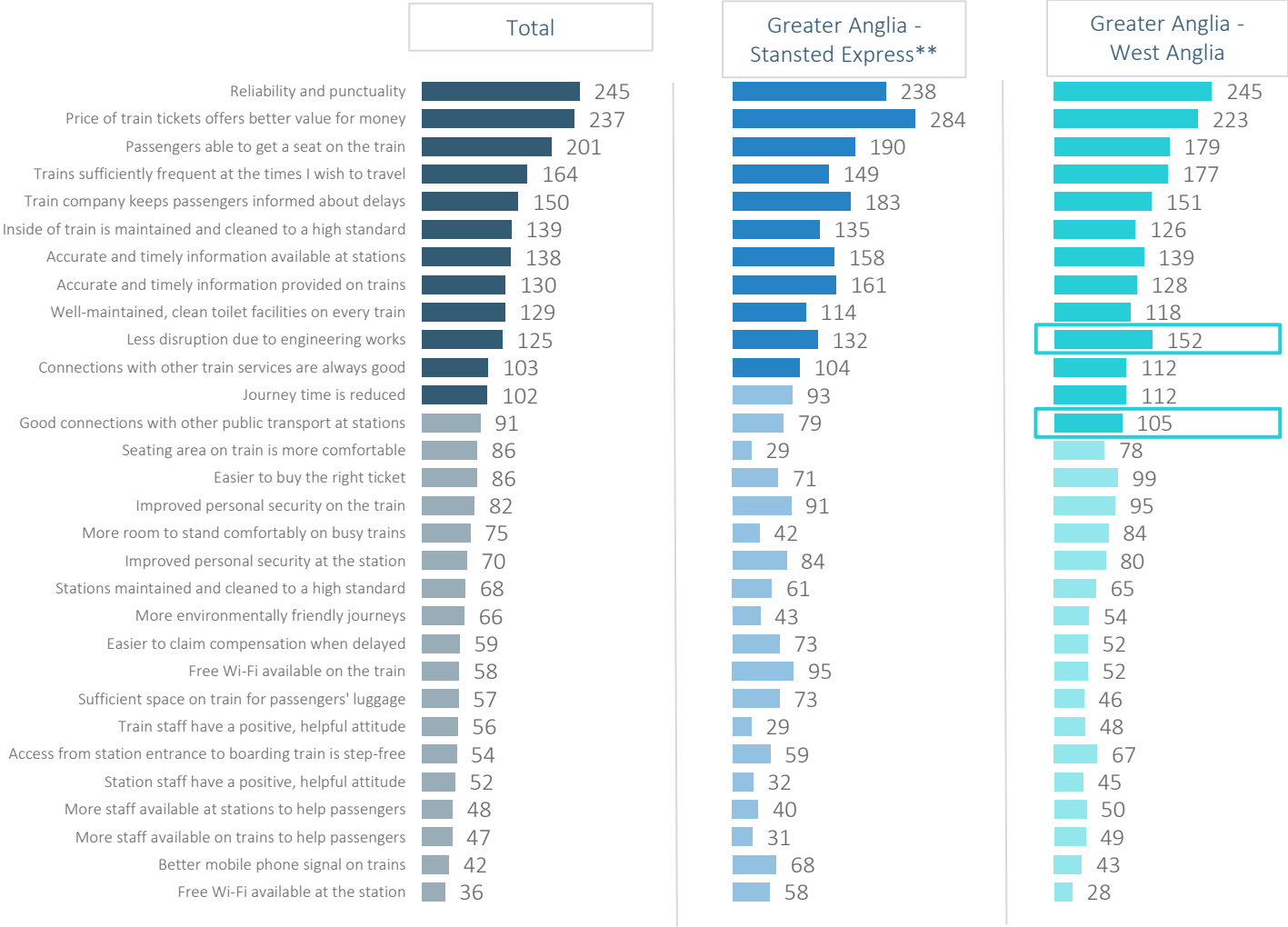
Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100



# Priorities by Greater Anglia building block

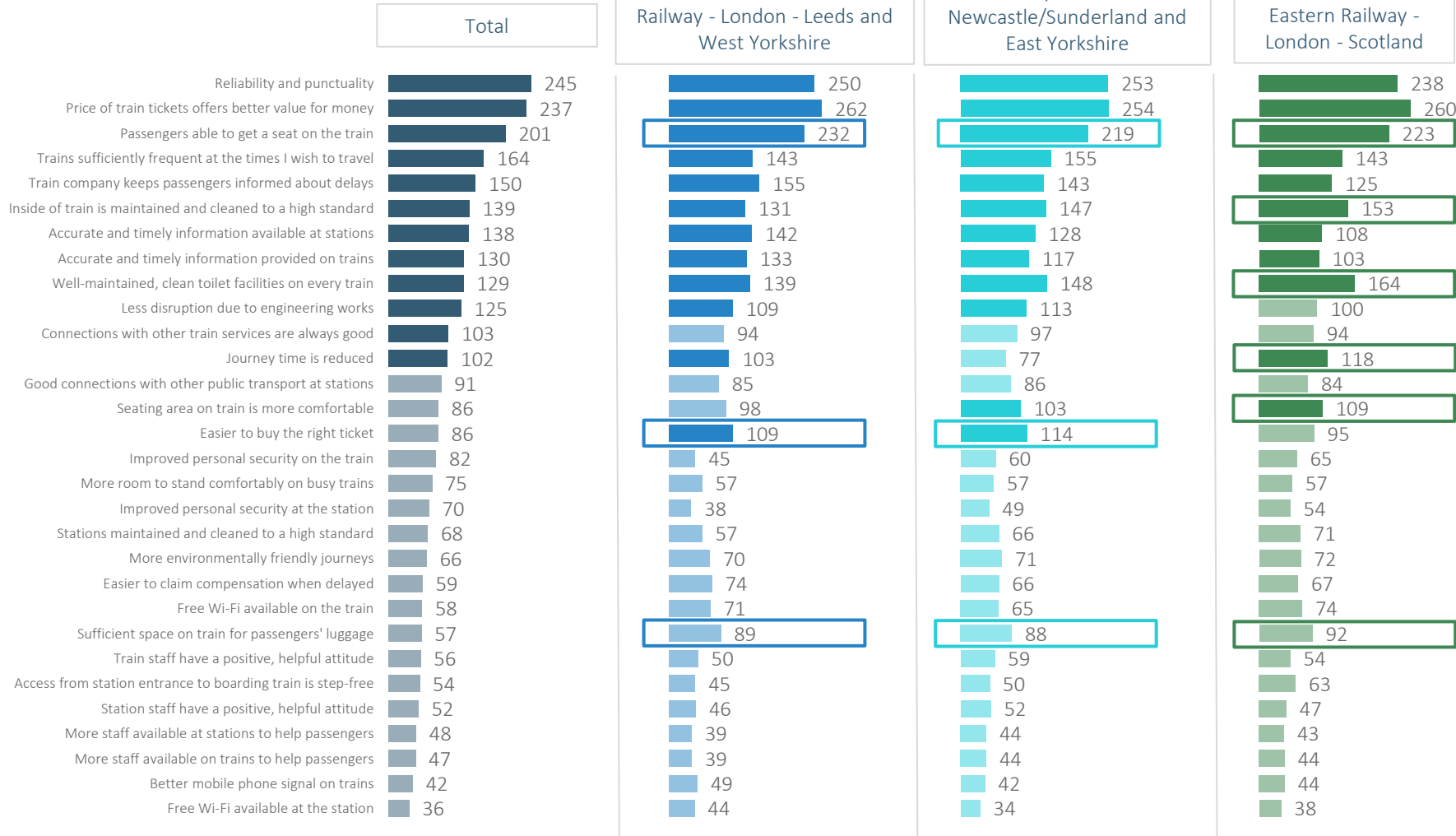
Improvement priorities by NRPS Building Blocks [index]  
Darker bars indicate index score over 100



# Priorities by London North Eastern Railway building block

Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100

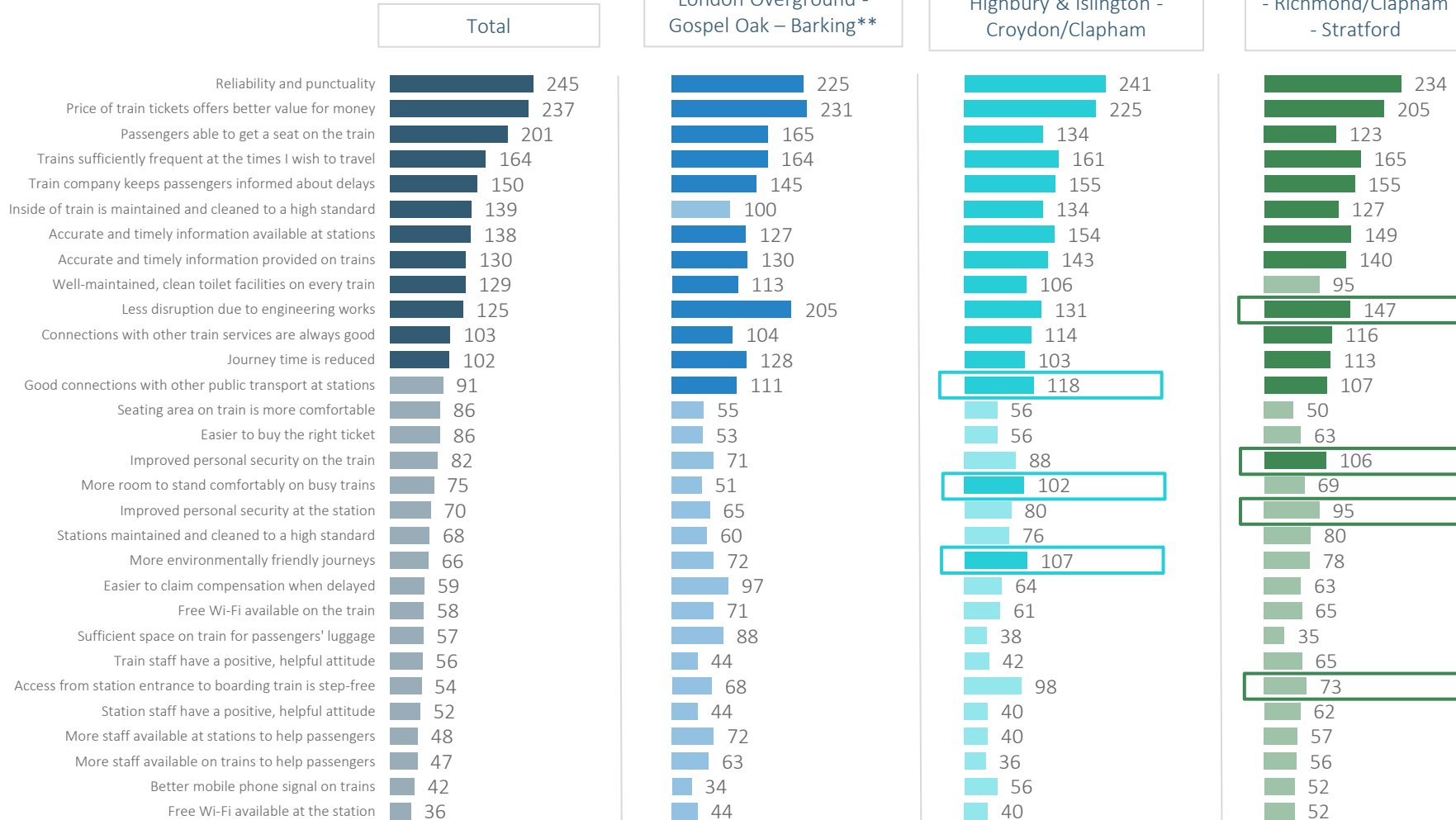




# Priorities by London Overground building block

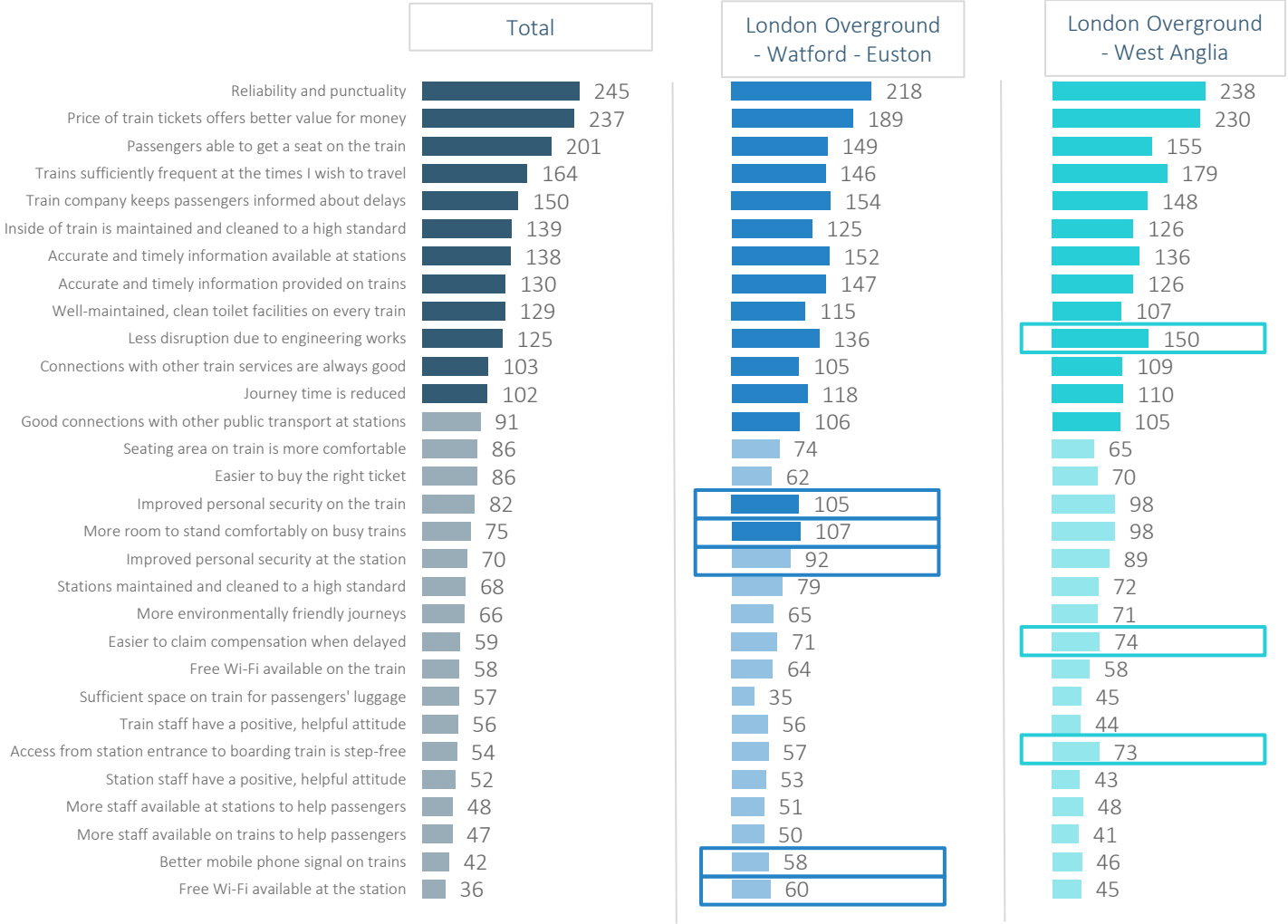
Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100



# Priorities by London Overground building block

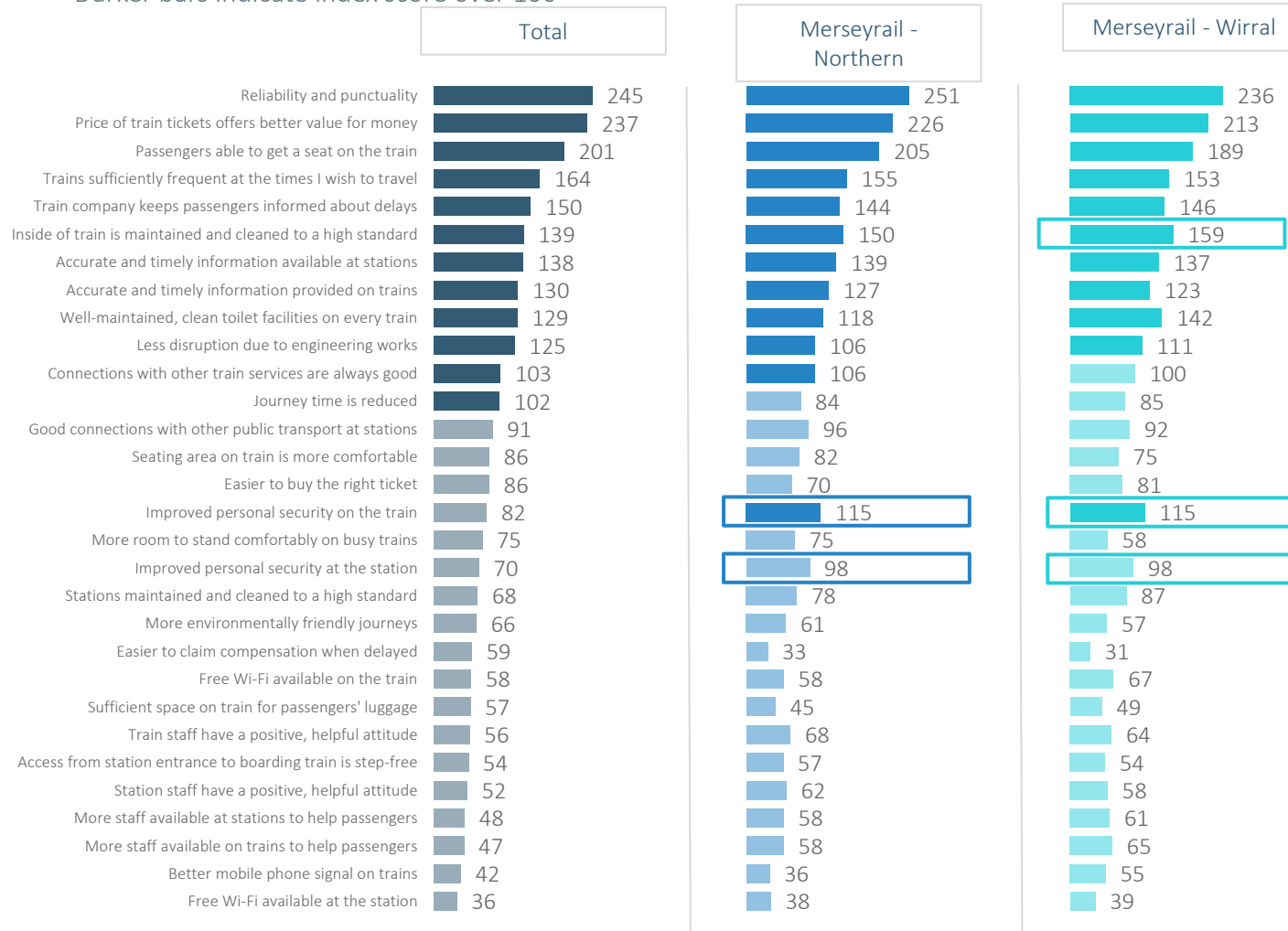
Improvement priorities by NRPS Building Blocks [index]  
Darker bars indicate index score over 100



# Priorities by Merseyrail building block

Improvement priorities by NRPS Building Blocks [index]

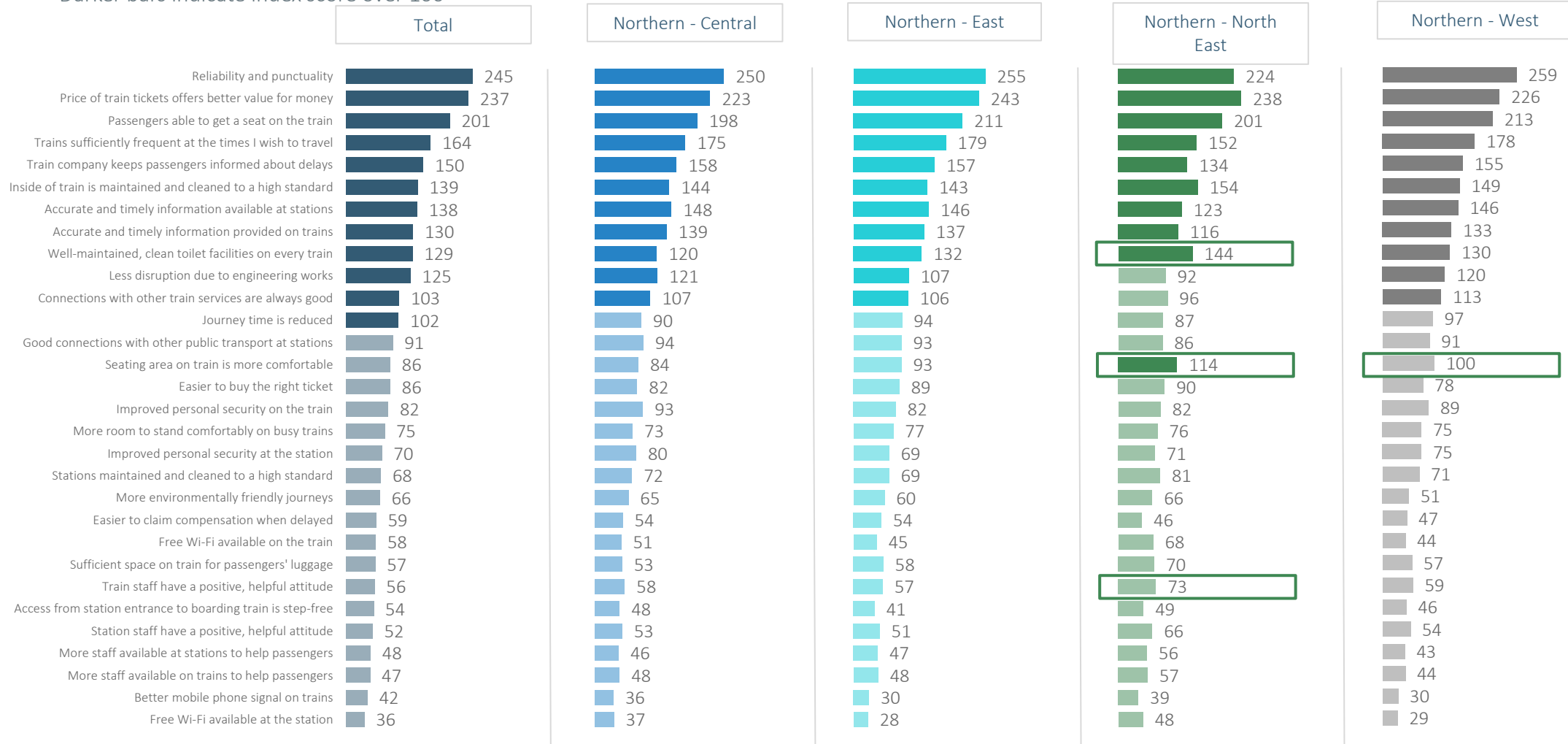
Darker bars indicate index score over 100



# Priorities by Northern building block

Improvement priorities by NRPS Building Blocks [index]

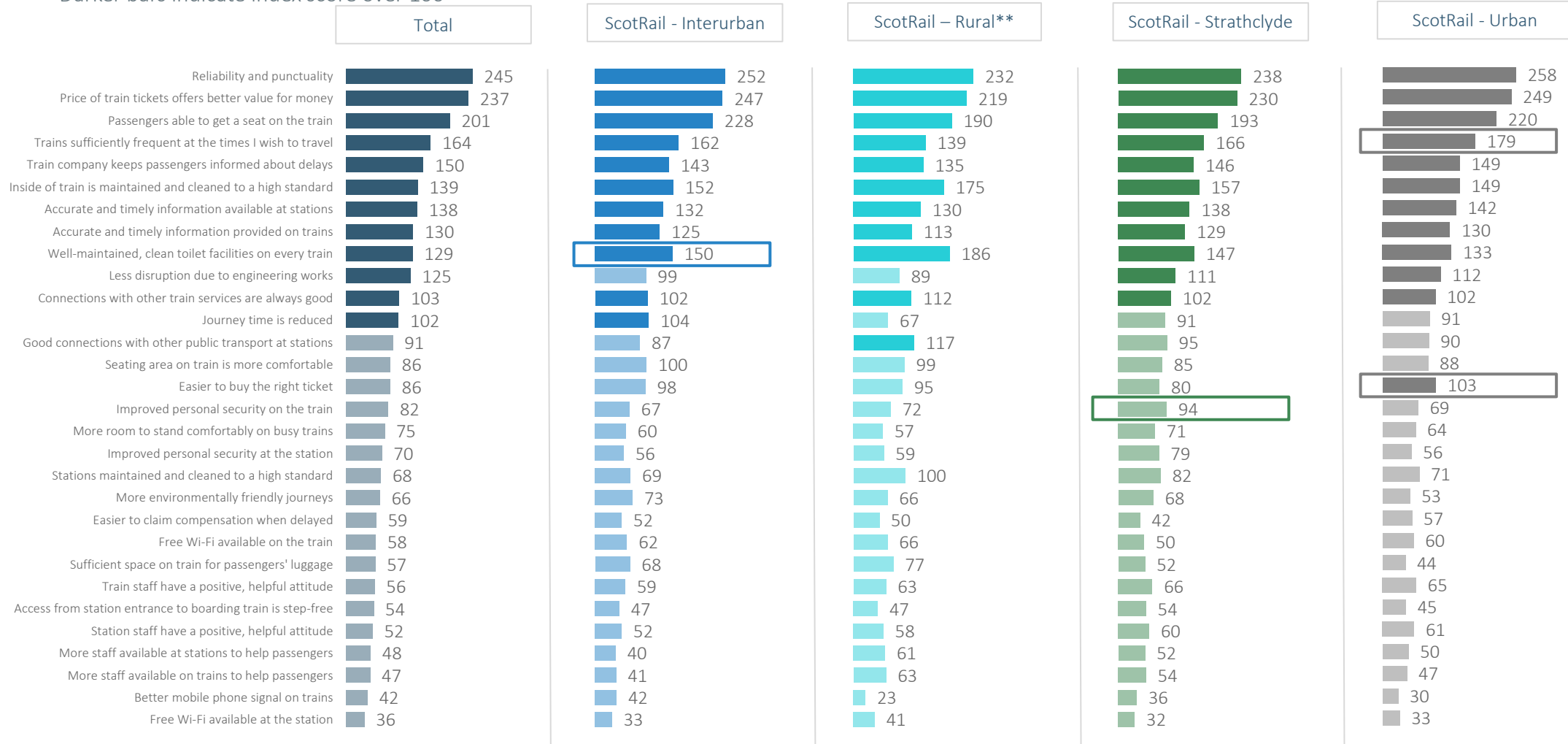
Darker bars indicate index score over 100



# Priorities by ScotRail building block

Improvement priorities by NRPS Building Blocks [index]

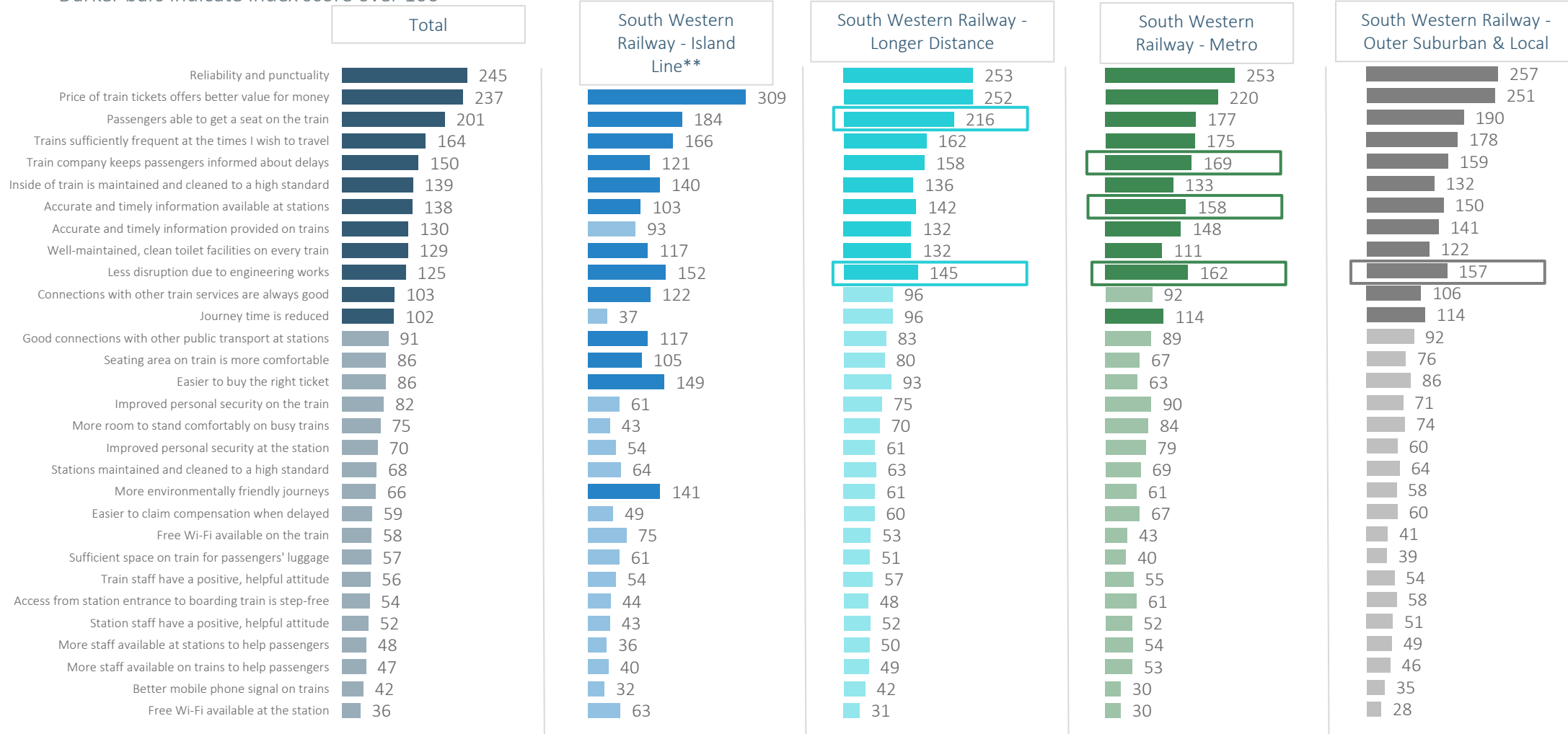
Darker bars indicate index score over 100



# Priorities by South Western Railway building block

Improvement priorities by NRPS Building Blocks [index]

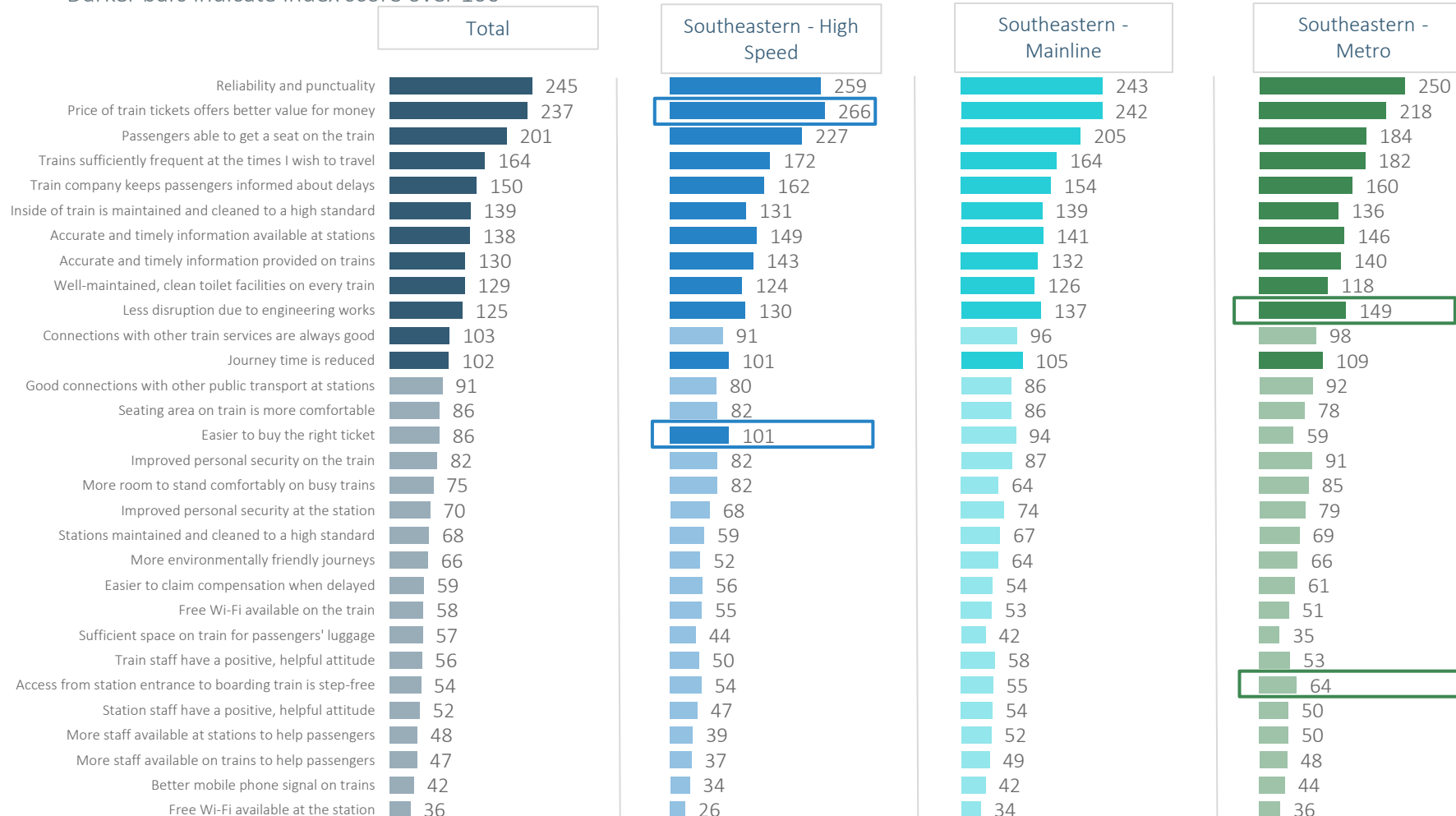
Darker bars indicate index score over 100



# Priorities by Southeastern building block

Improvement priorities by NRPS Building Blocks [index]

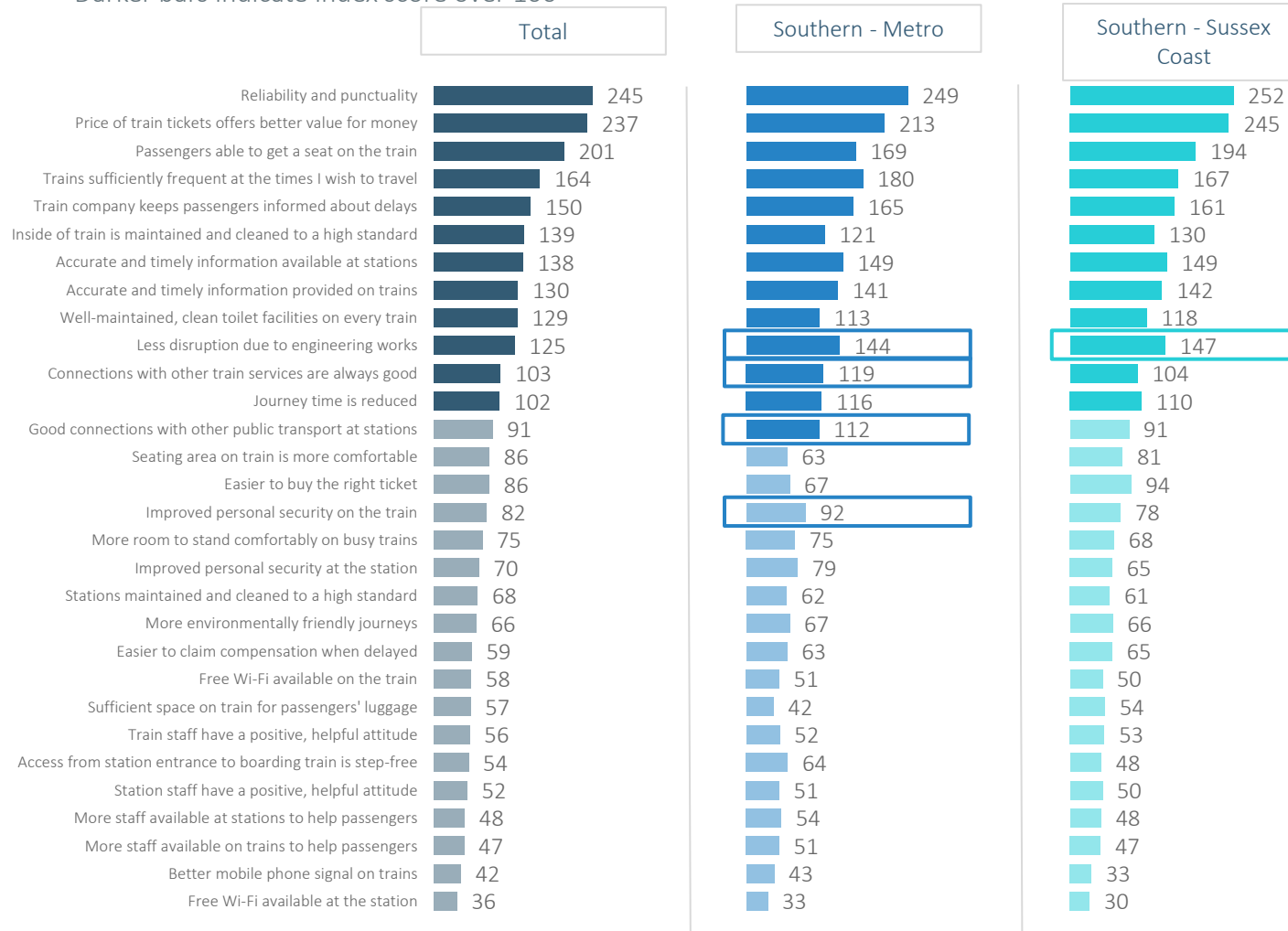
Darker bars indicate index score over 100



# Priorities by Southern building block

Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100

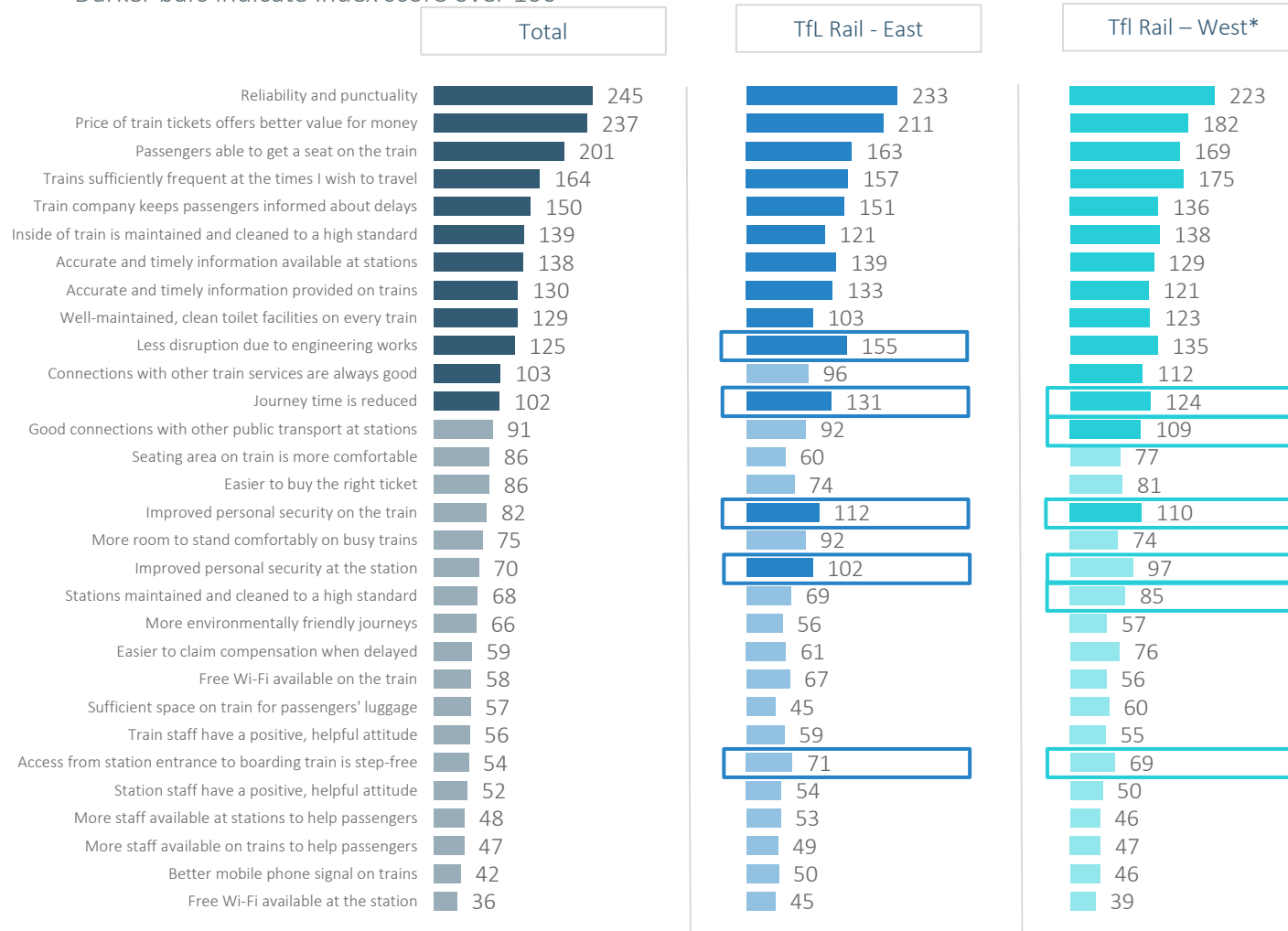




# Priorities by TfL Rail building block

Improvement priorities by NRPS Building Blocks [index]

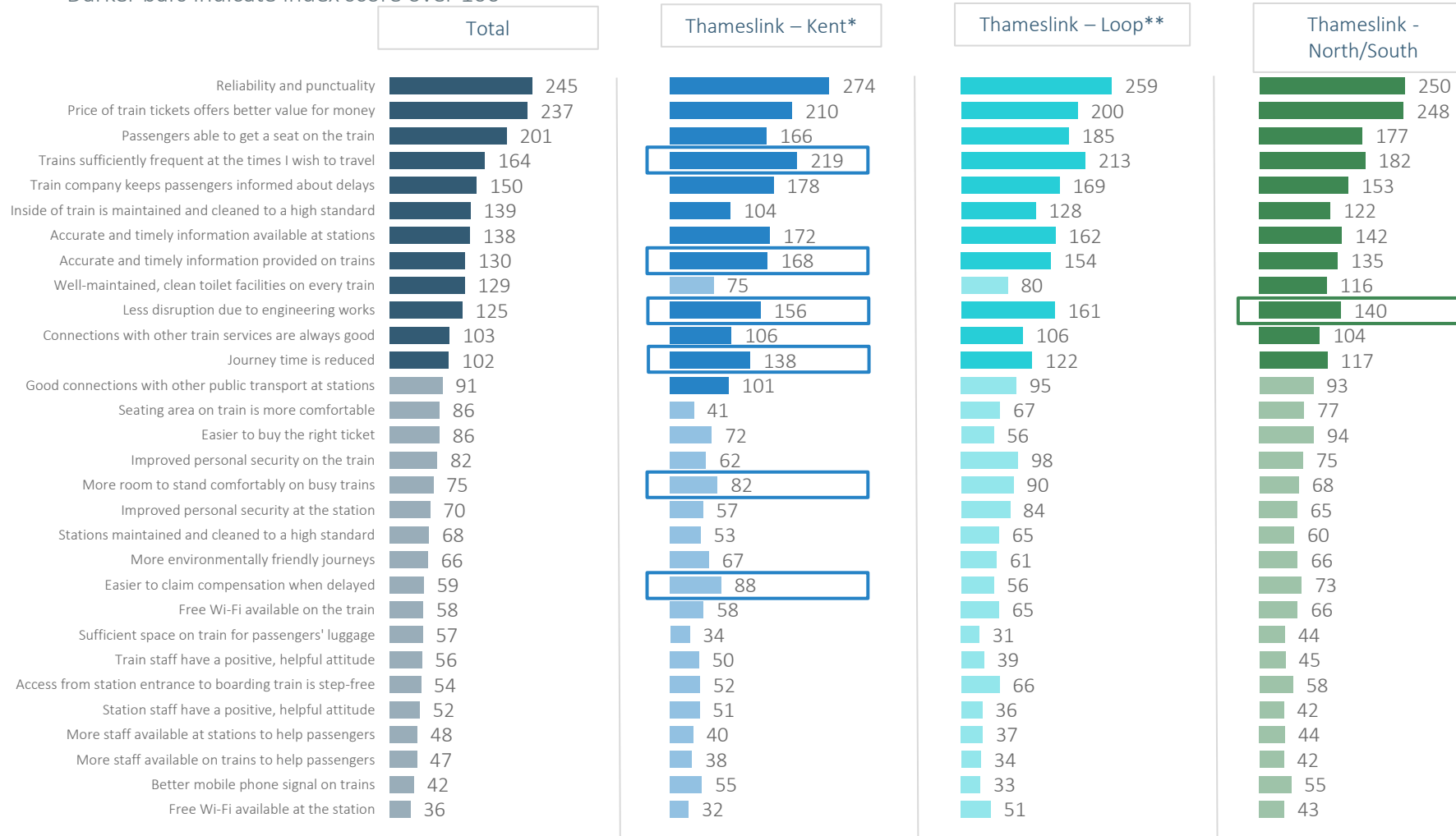
Darker bars indicate index score over 100



# Priorities by Thameslink building block

Improvement priorities by NRPS Building Blocks [index]

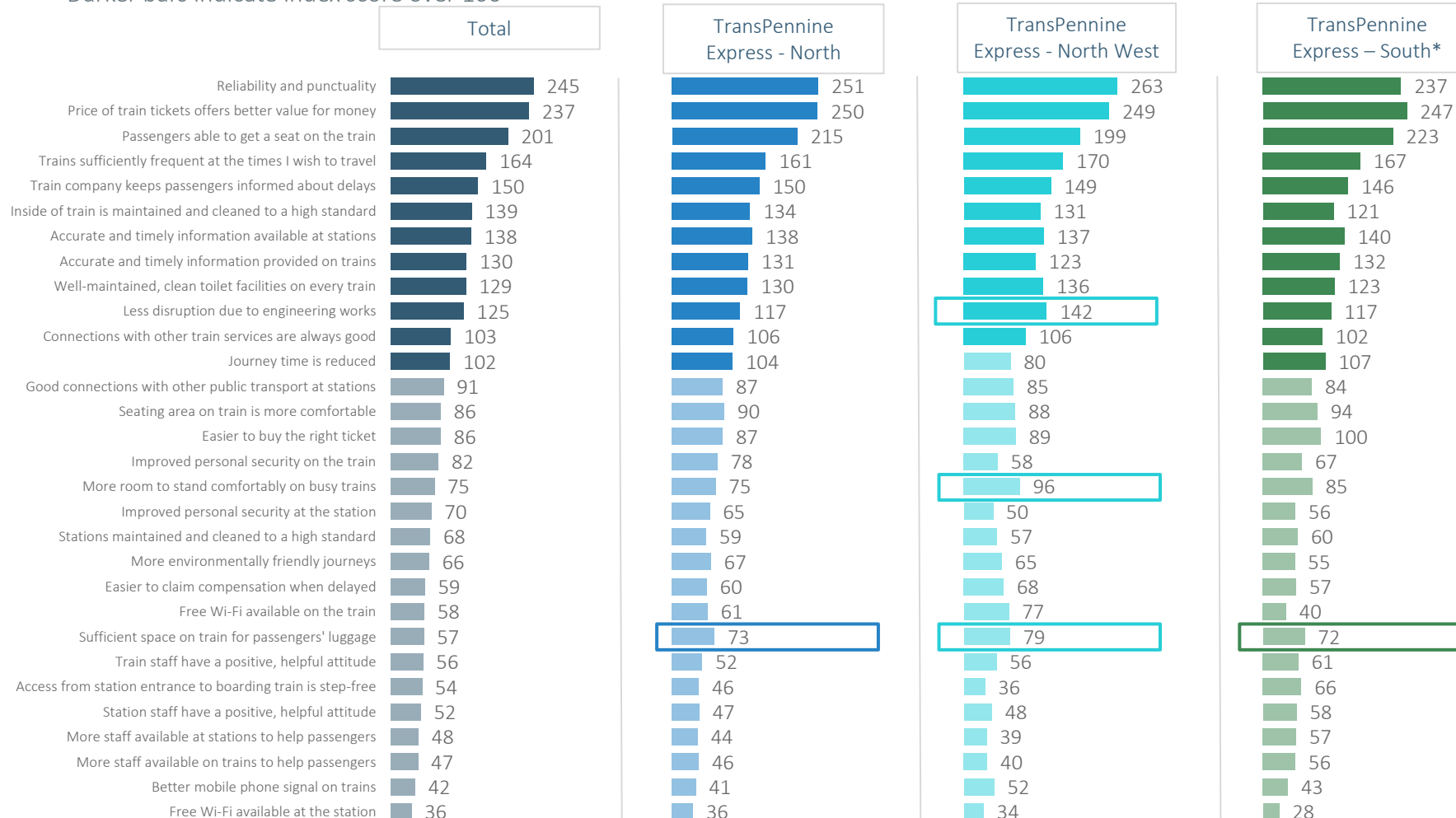
Darker bars indicate index score over 100



# Priorities by TransPennine Express building block

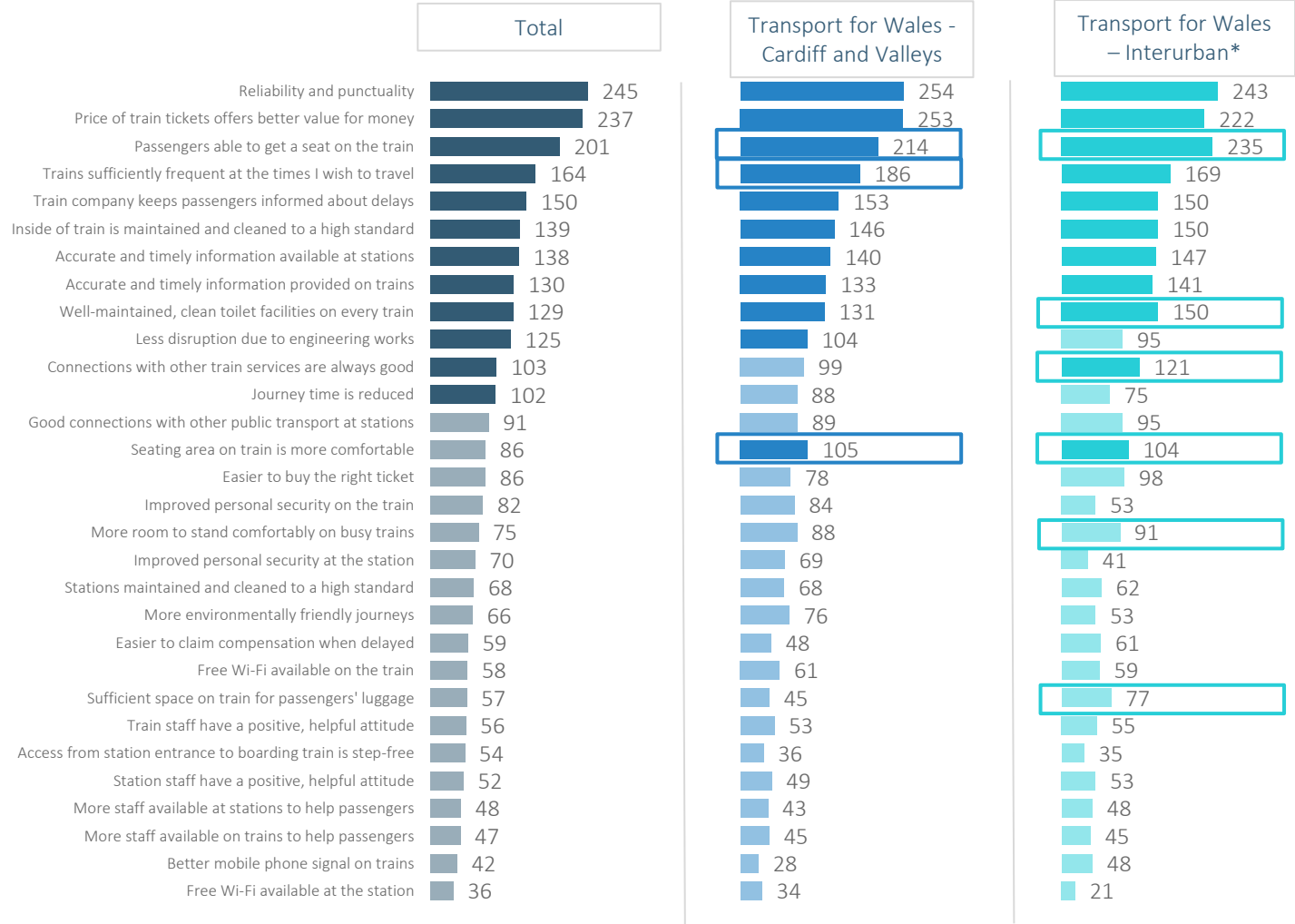
Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100



# Priorities by Transport for Wales building block

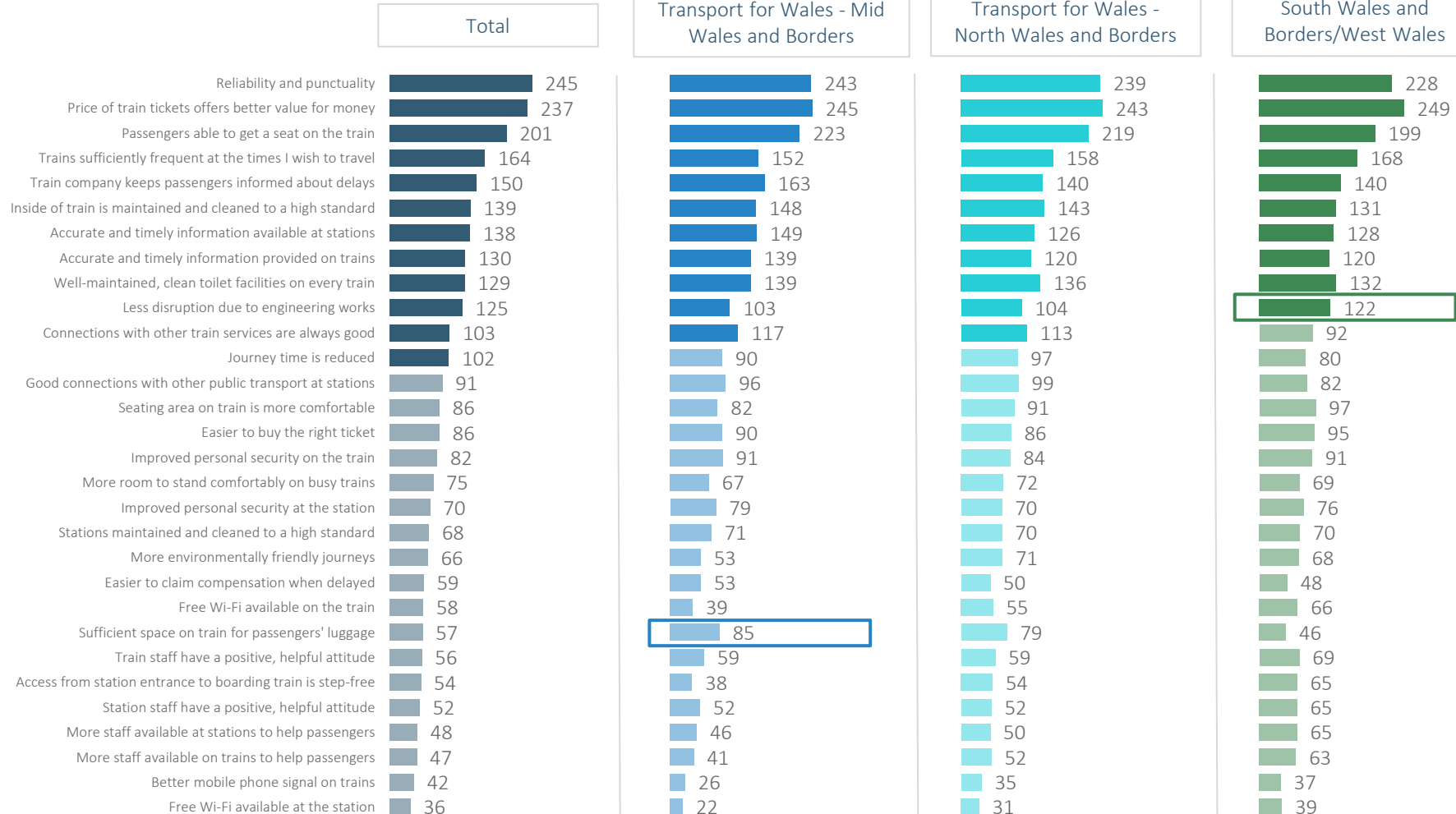
Improvement priorities by NRPS Building Blocks [index]  
Darker bars indicate index score over 100



# Priorities by Transport for Wales building block

Improvement priorities by NRPS Building Blocks [index]

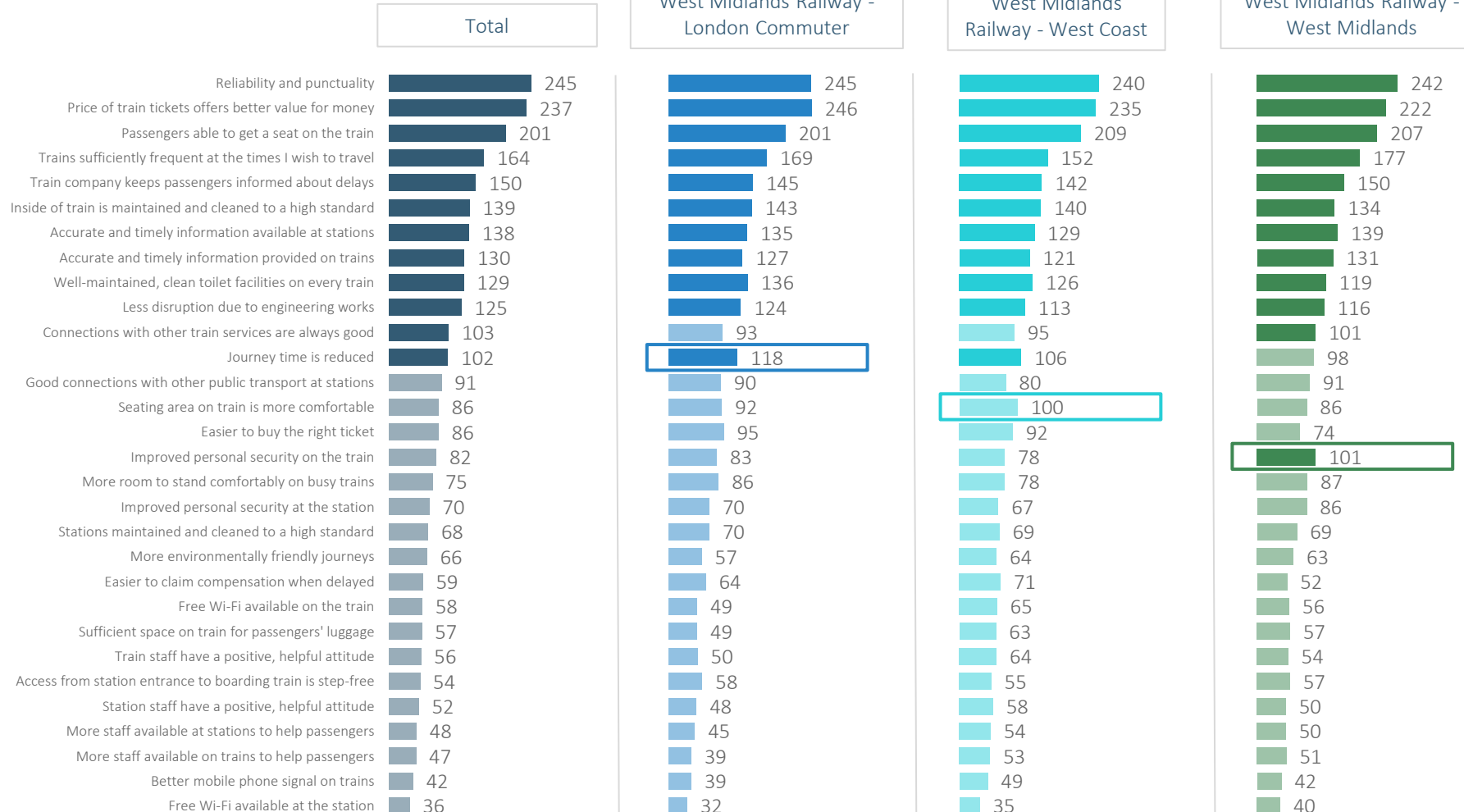
Darker bars indicate index score over 100



# Priorities by West Midlands Railway building block

Improvement priorities by NRPS Building Blocks [index]

Darker bars indicate index score over 100

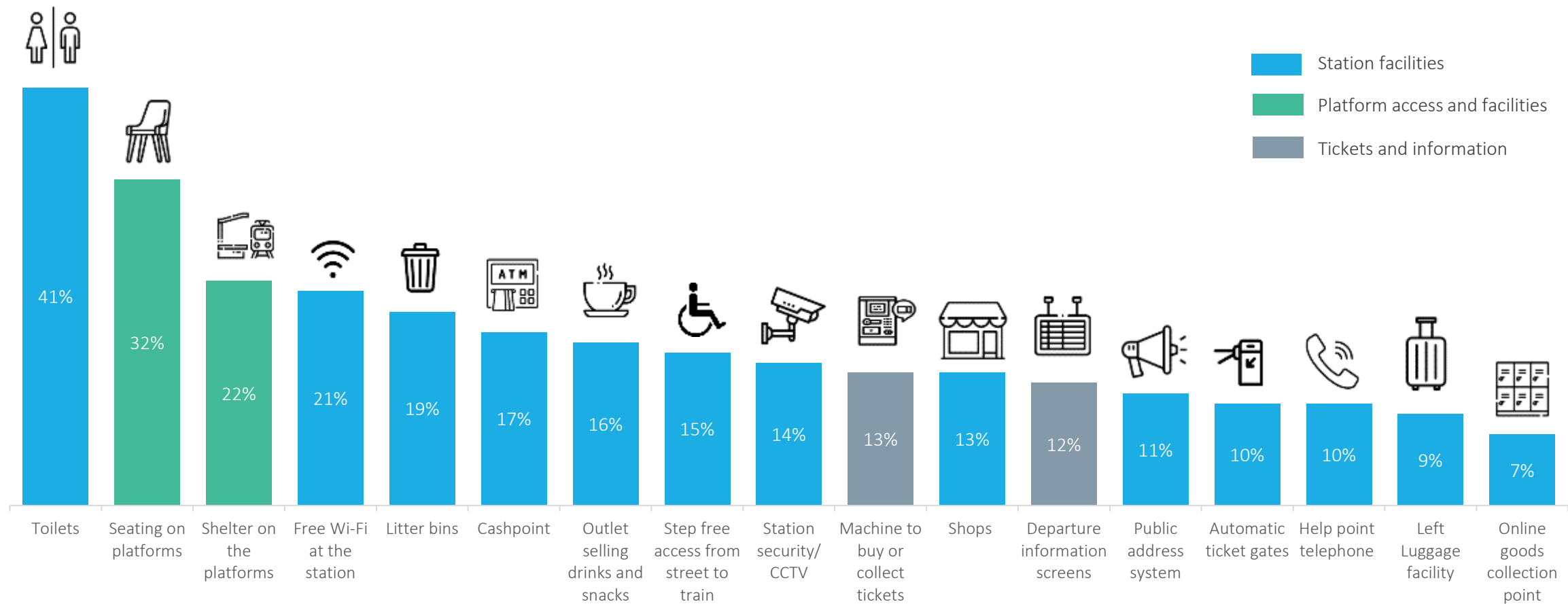


# Improvements to stations

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# Nearly half of passengers in 2020 said station toilet facilities need improving, with seats and shelters on platforms considered the next most pressing

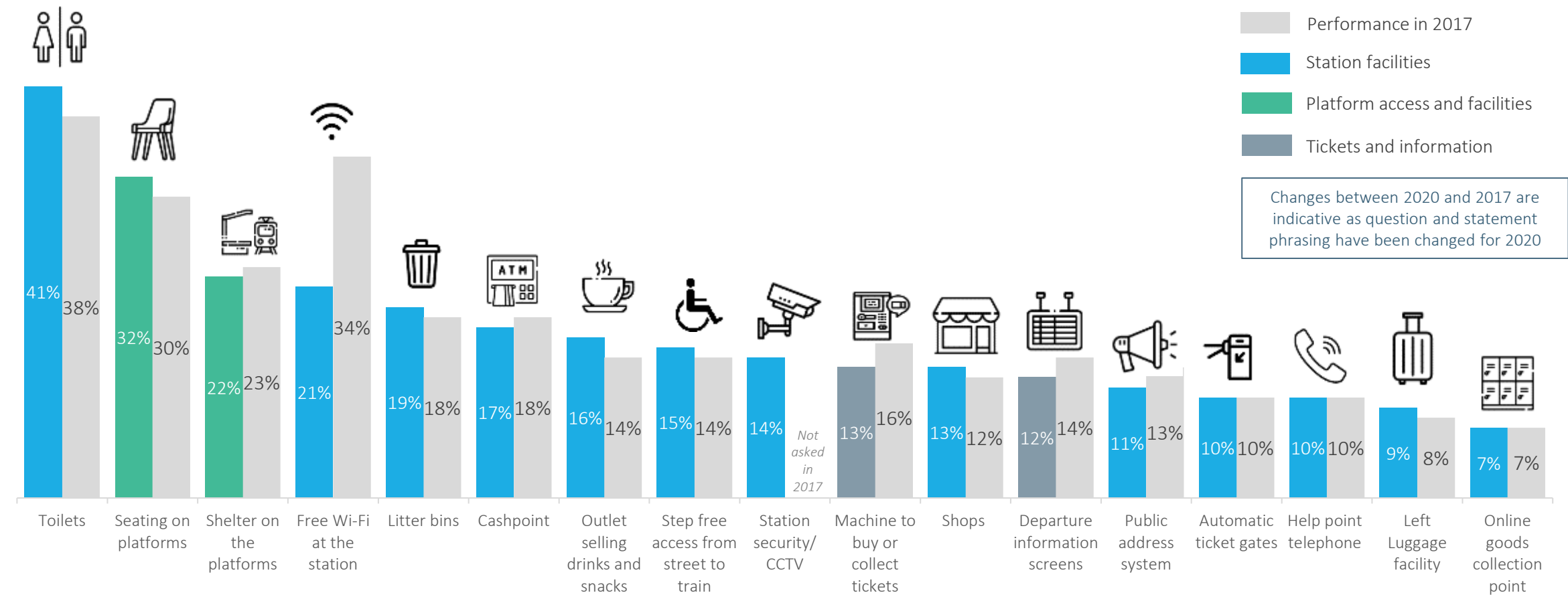
Station improvements by total





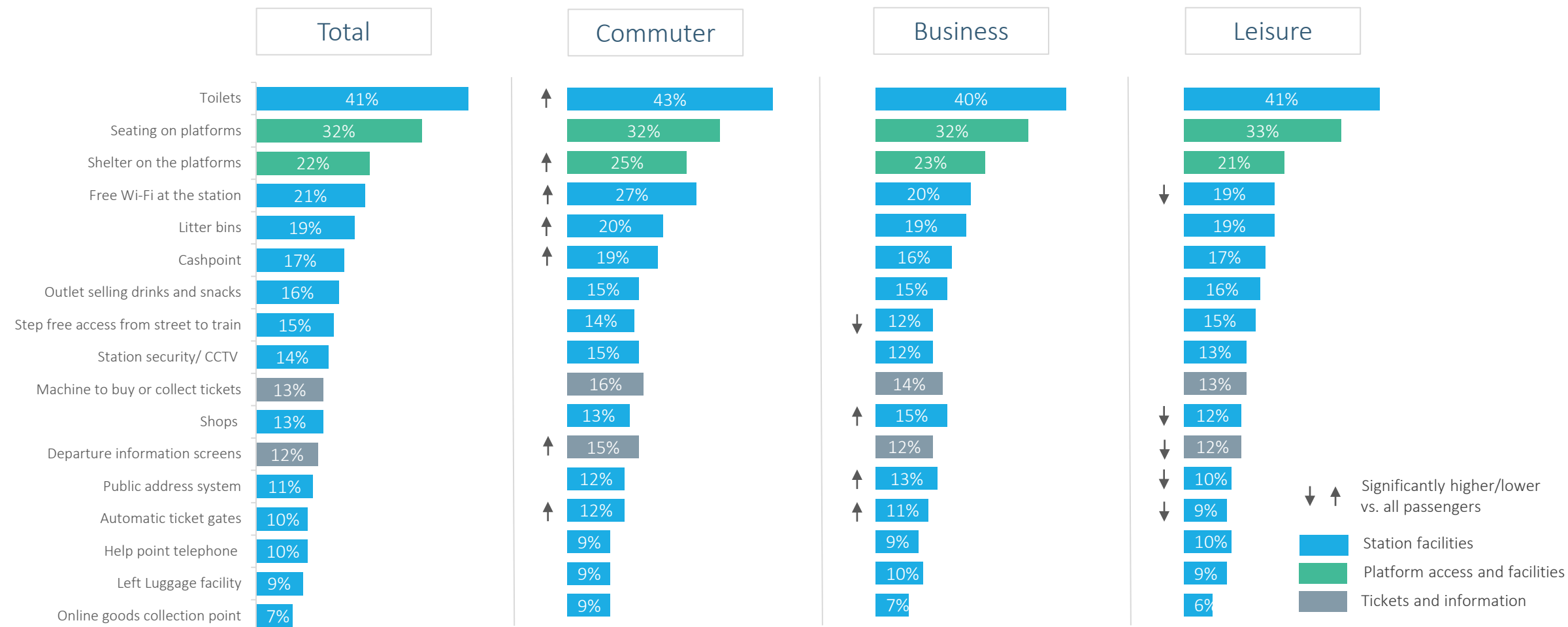
In 2017, over a third of rail users mentioned improving toilets facilities as a key concern. Free station Wi-Fi has dropped from second most pressing improvement in 2017 to fourth

Station improvements by total



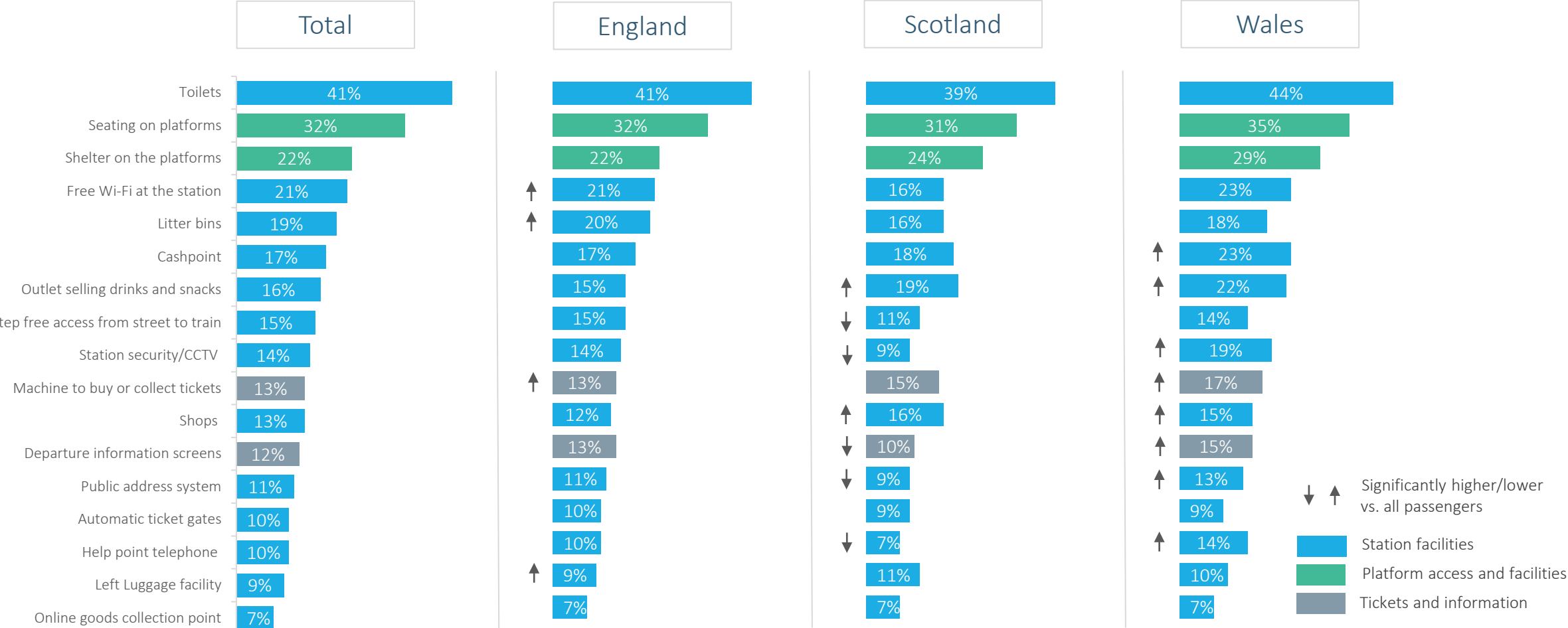
# Commuters are significantly more likely to think improvements are necessary for several different elements of the station they travel from most often, in particular free Wi-Fi

Station improvement priorities by journey purpose



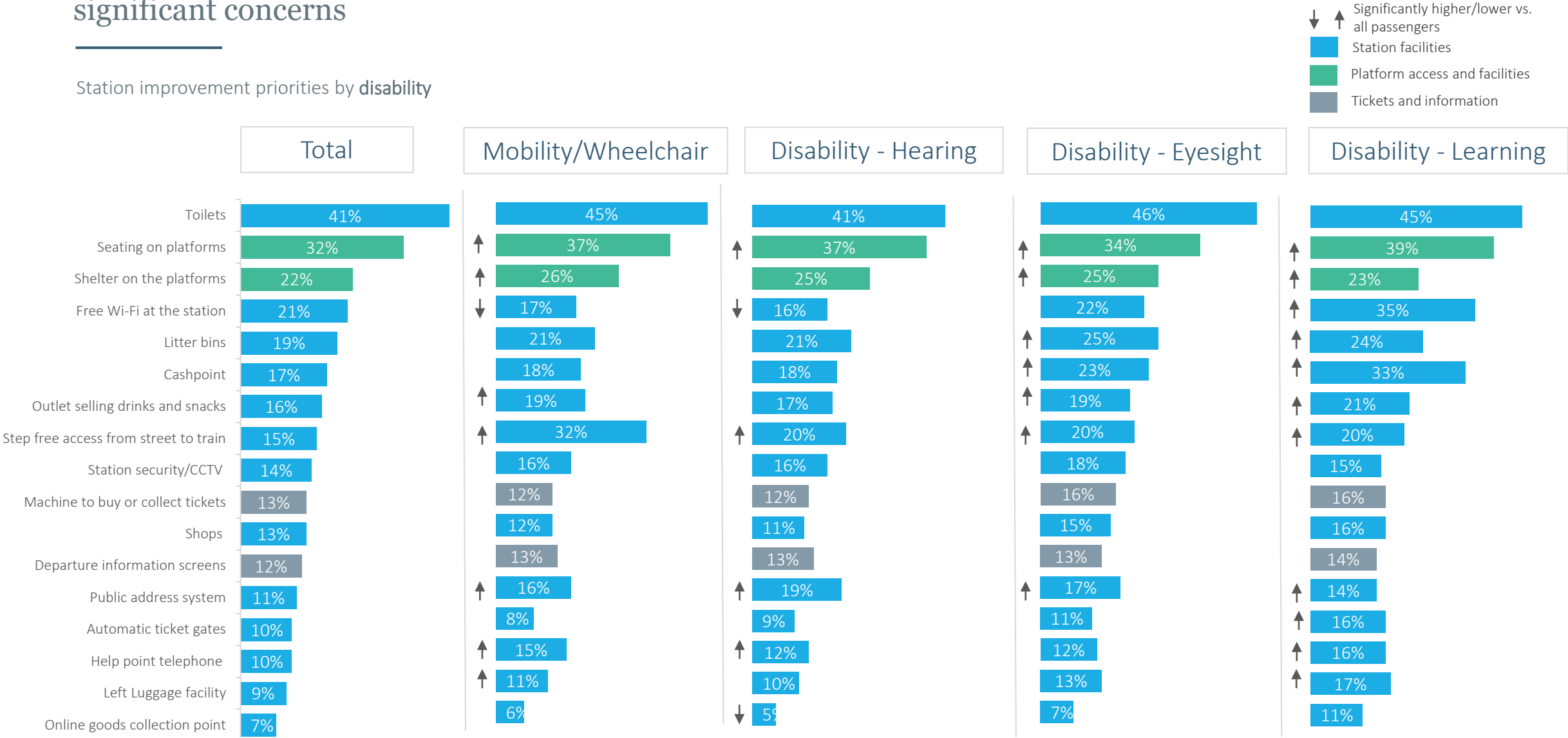
# Improvements around cashpoints and drink/snack outlets are significantly more likely to be seen as a priority in Wales

Station improvement priorities by nation



# Improvements around station seating and platform shelters are significantly more likely to be seen as a priority across passengers with disabilities. Step free access, public address systems and help point telephones are other significant concerns

Station improvement priorities by disability

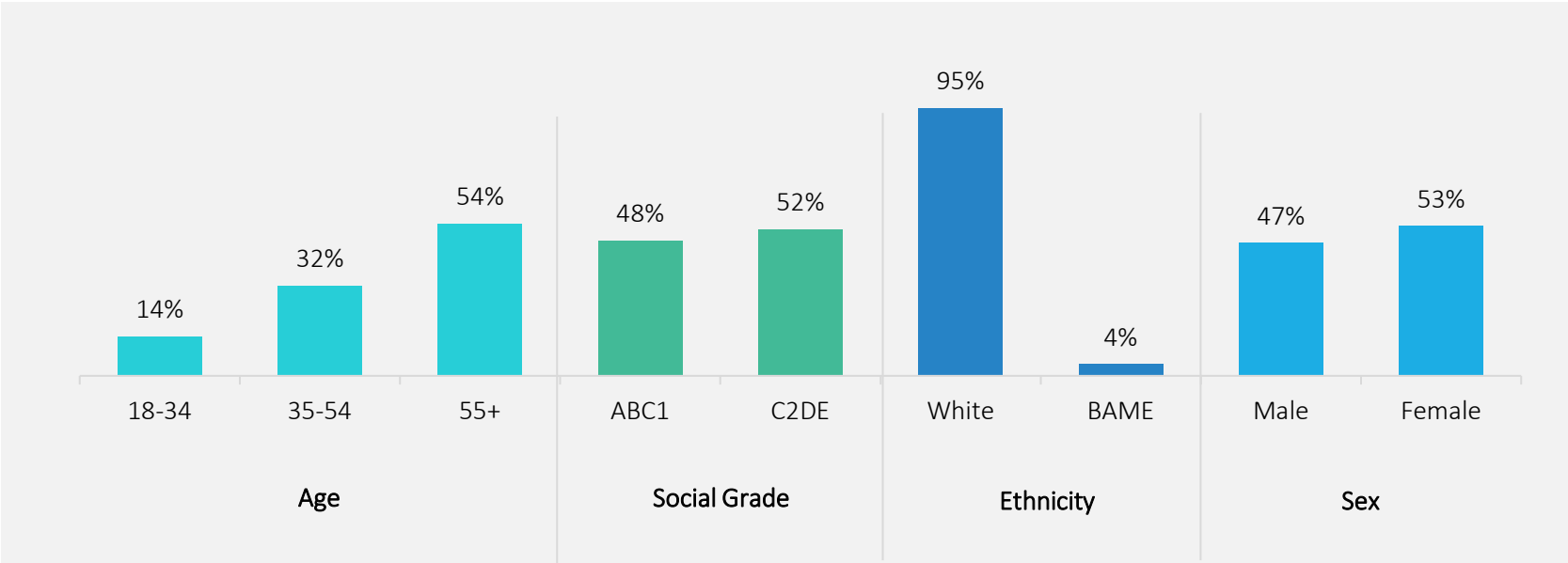


# Improvement considerations among non-rail users

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We ran three waves of our nationally representative Omnibus in March 2020. From 6,009 total GB respondents, 1,787 were non-rail users (travelled by train ever but not in the last 12 months)

Region	% of sample
Eastern	13%
North West	12%
South East	12%
South West	12%
East Midlands	10%
Yorkshire and the Humber	9%
Scotland	8%
West Midlands	8%
Wales	7%
North East	5%
London	5%

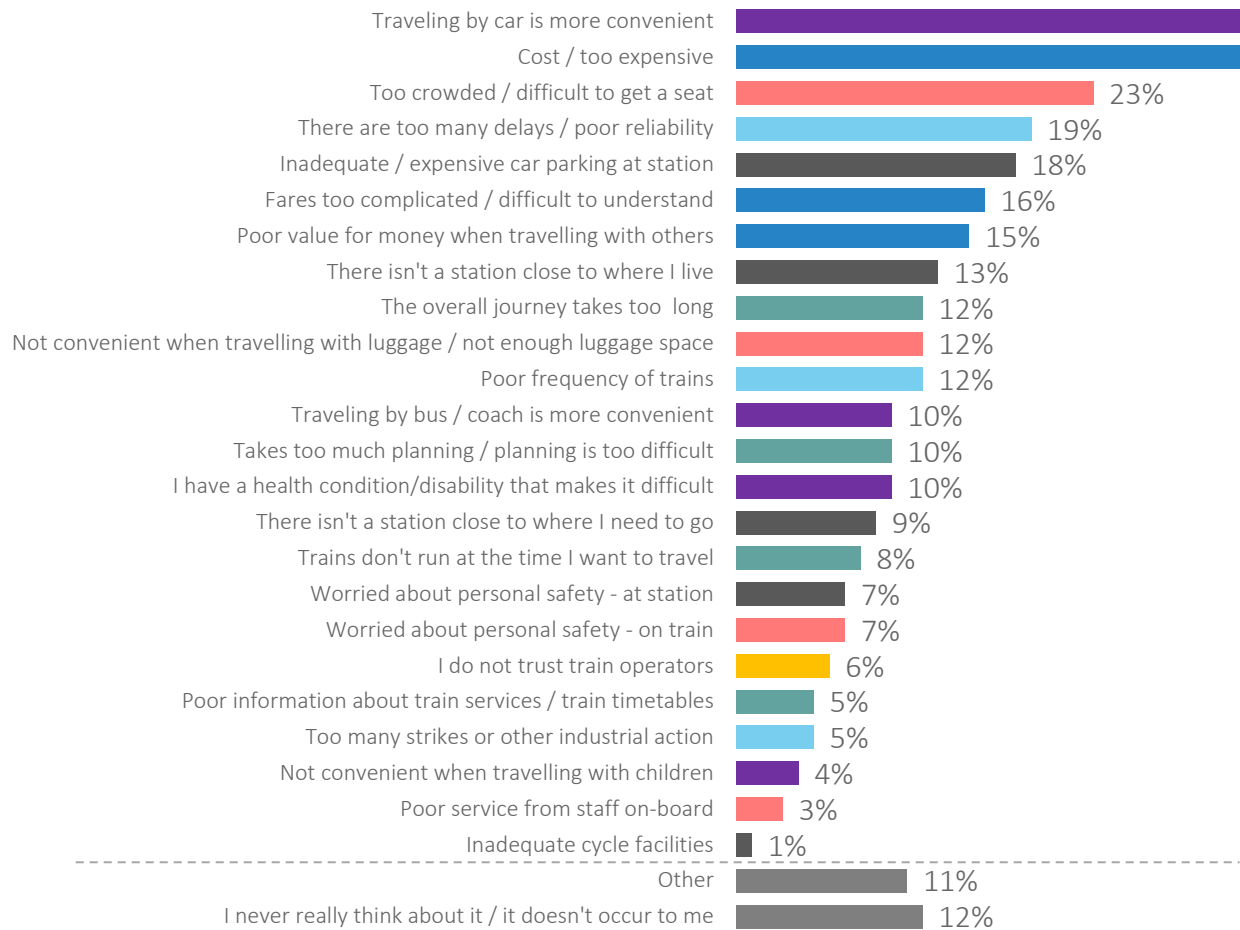


Distance from nearest station:



# The key reasons for not travelling by train more are cost and a car being more convenient. Most reasons are accentuated among those living further away from a station

Reasons for not travelling more by train  
All non-rail users

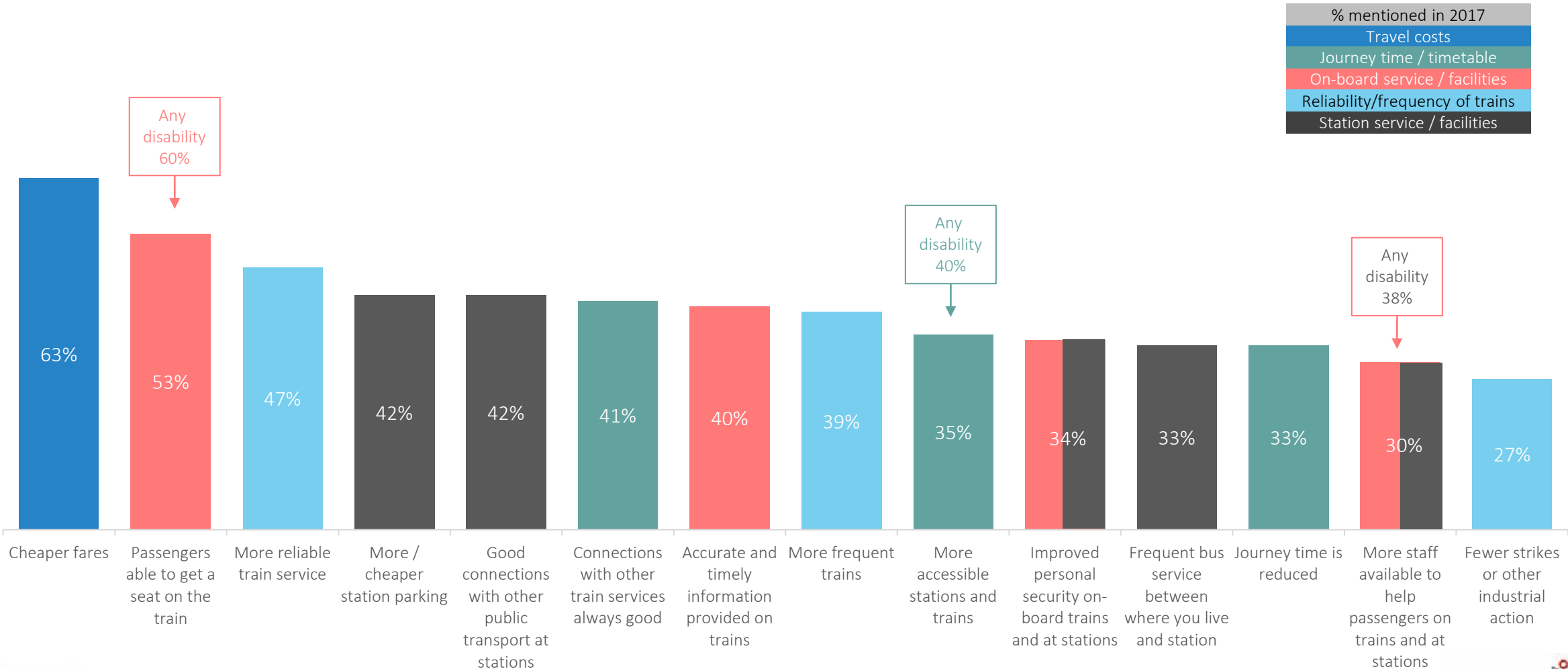


	All rail non-users	Rail non-users who live 5+ miles away from nearest station
NET: Inconvenient / prefer other transport	66%	69%
NET: Travel costs	56%	62%
NET: Journey time / timetables	32%	50%
NET: Poor service / facilities on-board trains	30%	32%
NET: Reliability / frequency of trains	25%	25%
NET: Poor station facilities / service	22%	28%
NET: Trust	6%	8%
NET: Other reason	11%	9%
I never really think about it / it doesn't occur to me	12%	10%

Reasons given remain relatively consistent with those of the wider passenger population regardless of disability or access to a car

# Non-rail users would be more encouraged to travel by rail if fares were cheaper, followed by greater certainty over seating and reliability

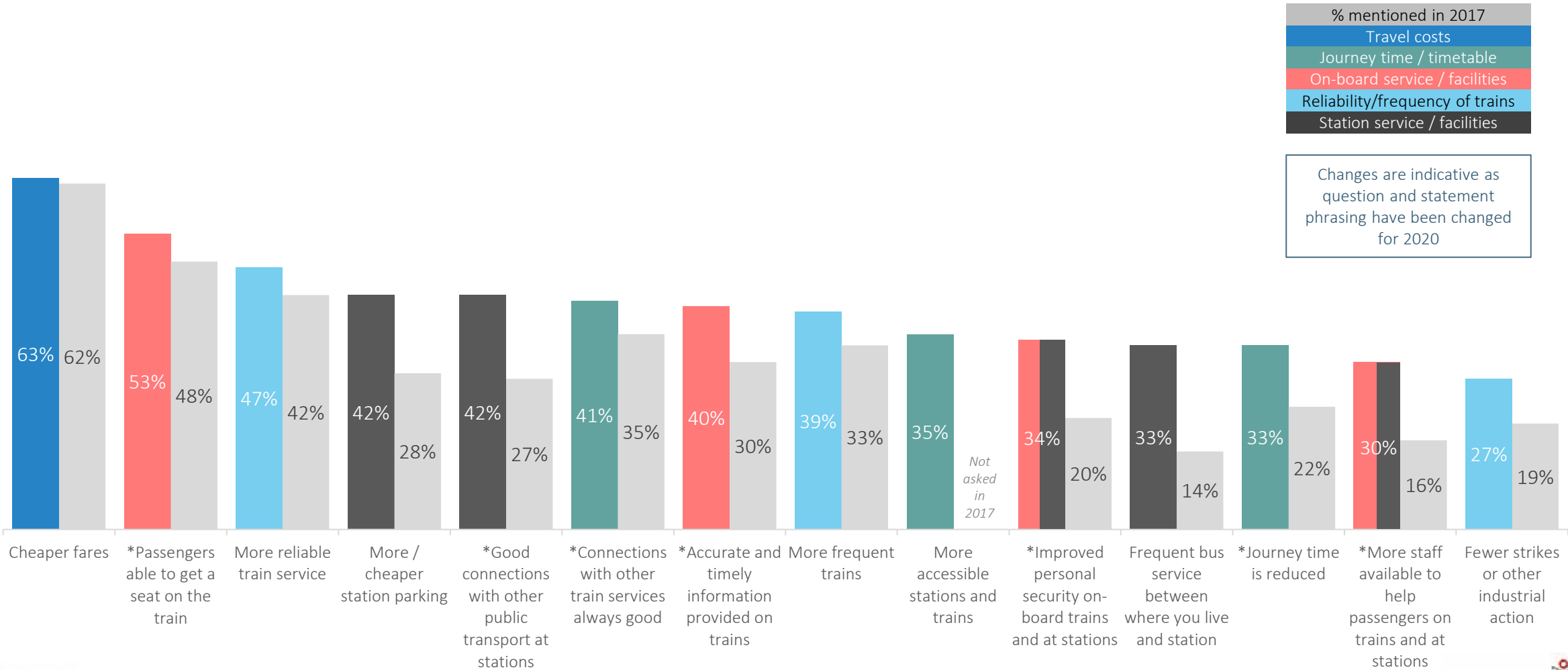
Impact on encouraging passengers to travel by train – NET: likely to encourage  
*All non-rail users*





# The top three improvement considerations for non-rail users in 2017 are consistent with; however connections with other train services were more important in 2017

Impact on encouraging passengers to travel by train – NET: likely to encourage  
All non-rail users

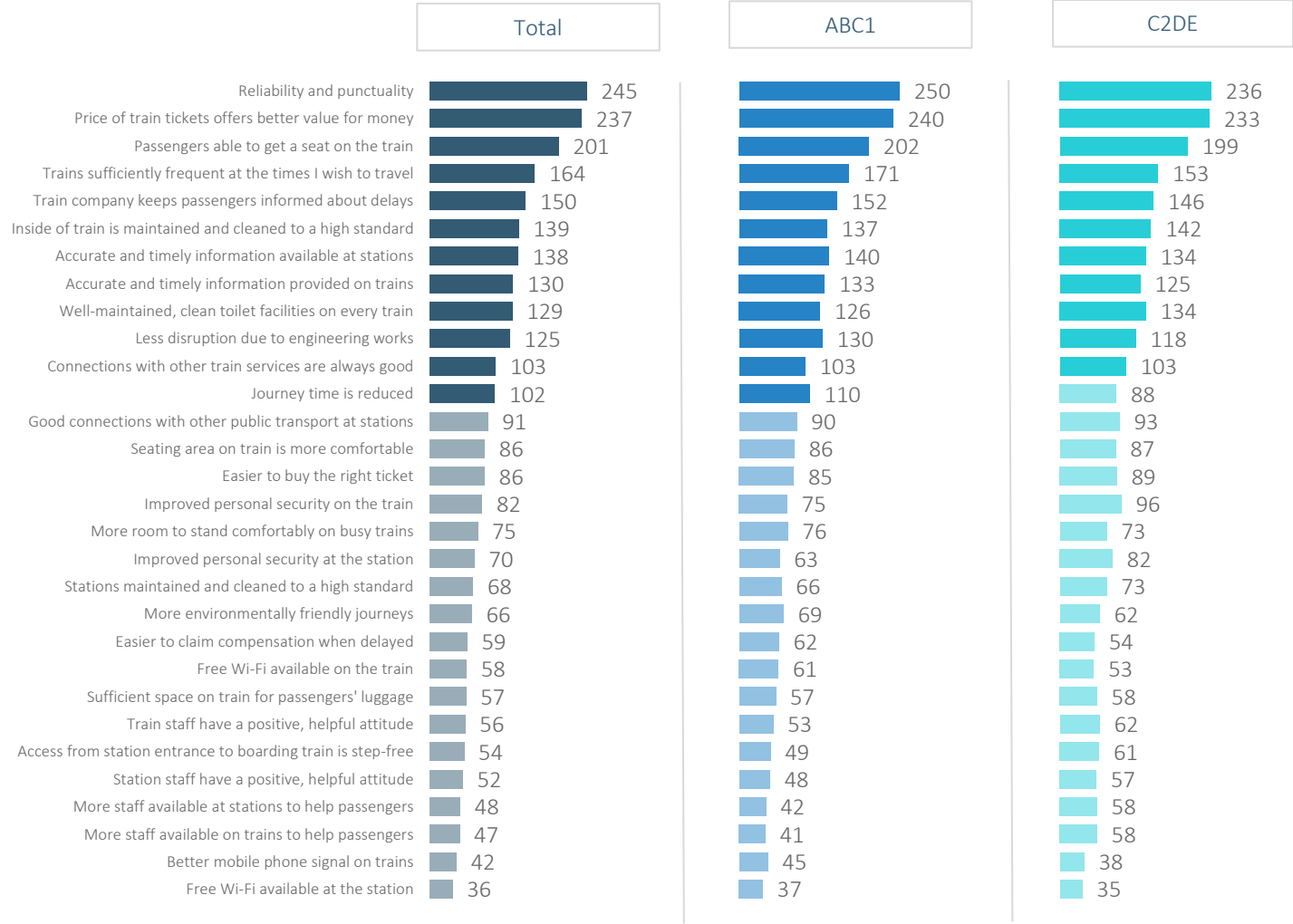


# Appendix – additional information

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# Beyond reliability and punctuality, value for money of tickets remains the key priority for improvement regardless of social grade

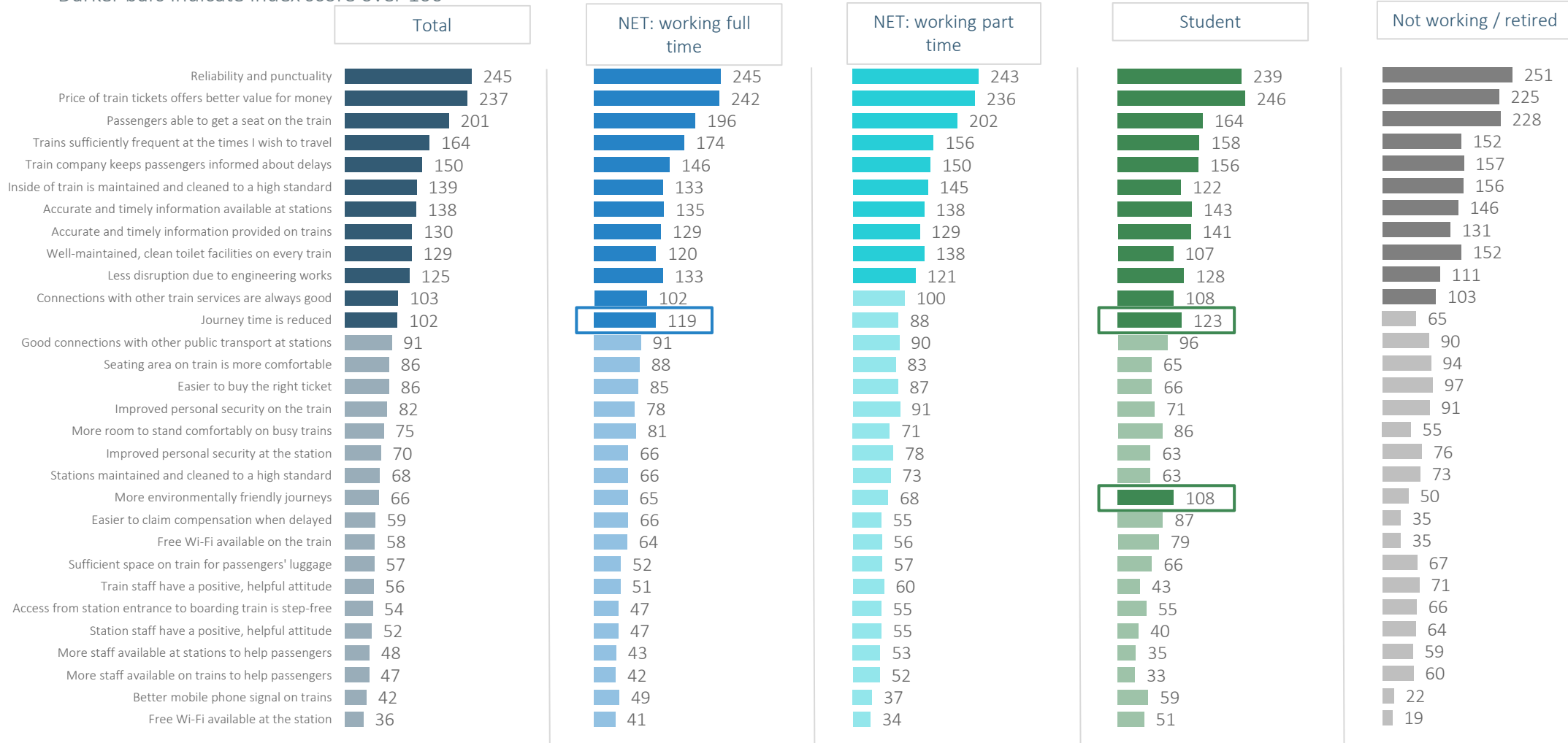
Improvement priorities by Social Grade [index]  
Darker bars indicate index score over 100



# Comparisons across working status suggest reduced journey times would be most welcomed by full-time workers and students. Students are also more concerned about the environmental impact of rail travel

Improvement priorities by Working Status [index]

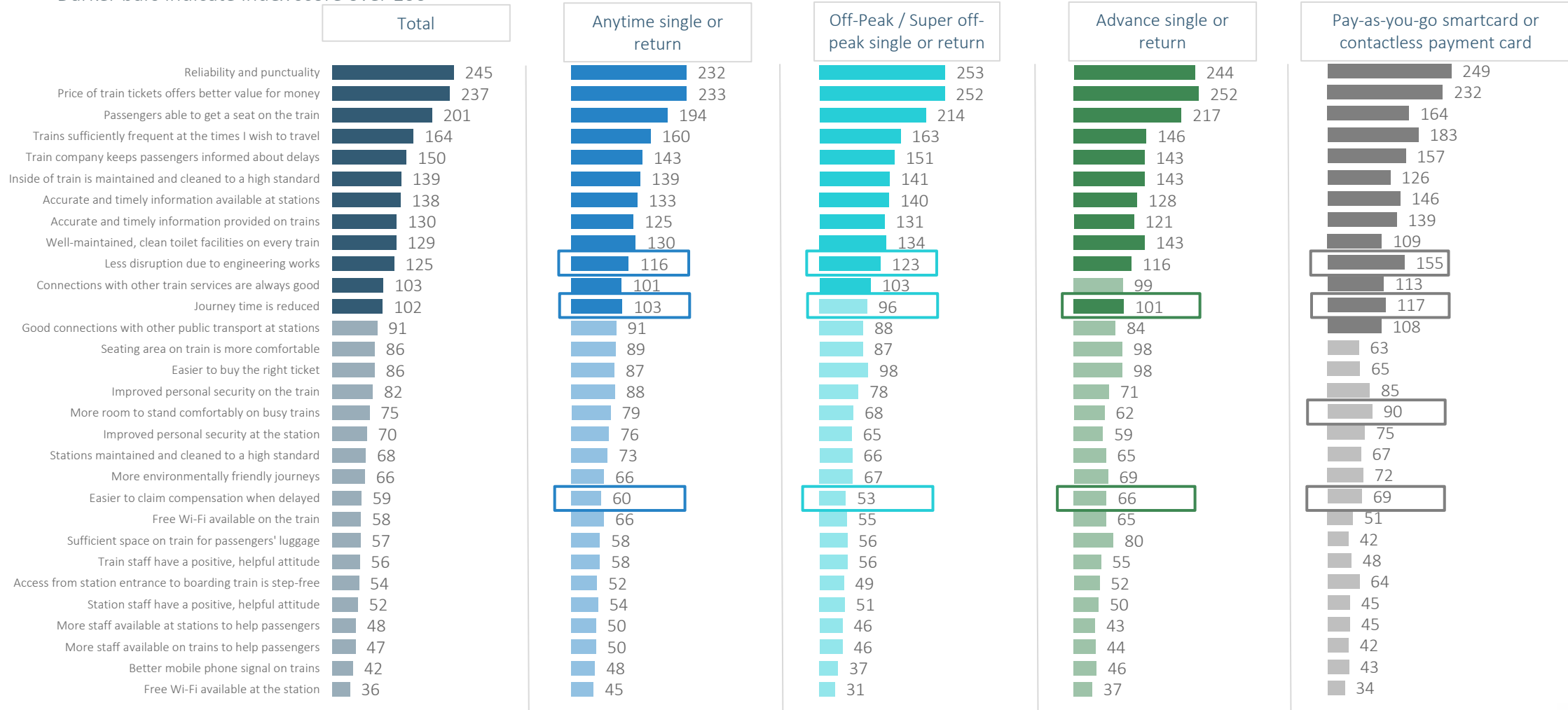
Darker bars indicate index score over 100



# Advance passengers prioritise clean toilet facilities, while season-ticket holders place greater importance on reducing journey times and the amount of disruption than the average passenger, as well as the ease of claiming compensation

## Improvement priorities by Ticket Type [index]

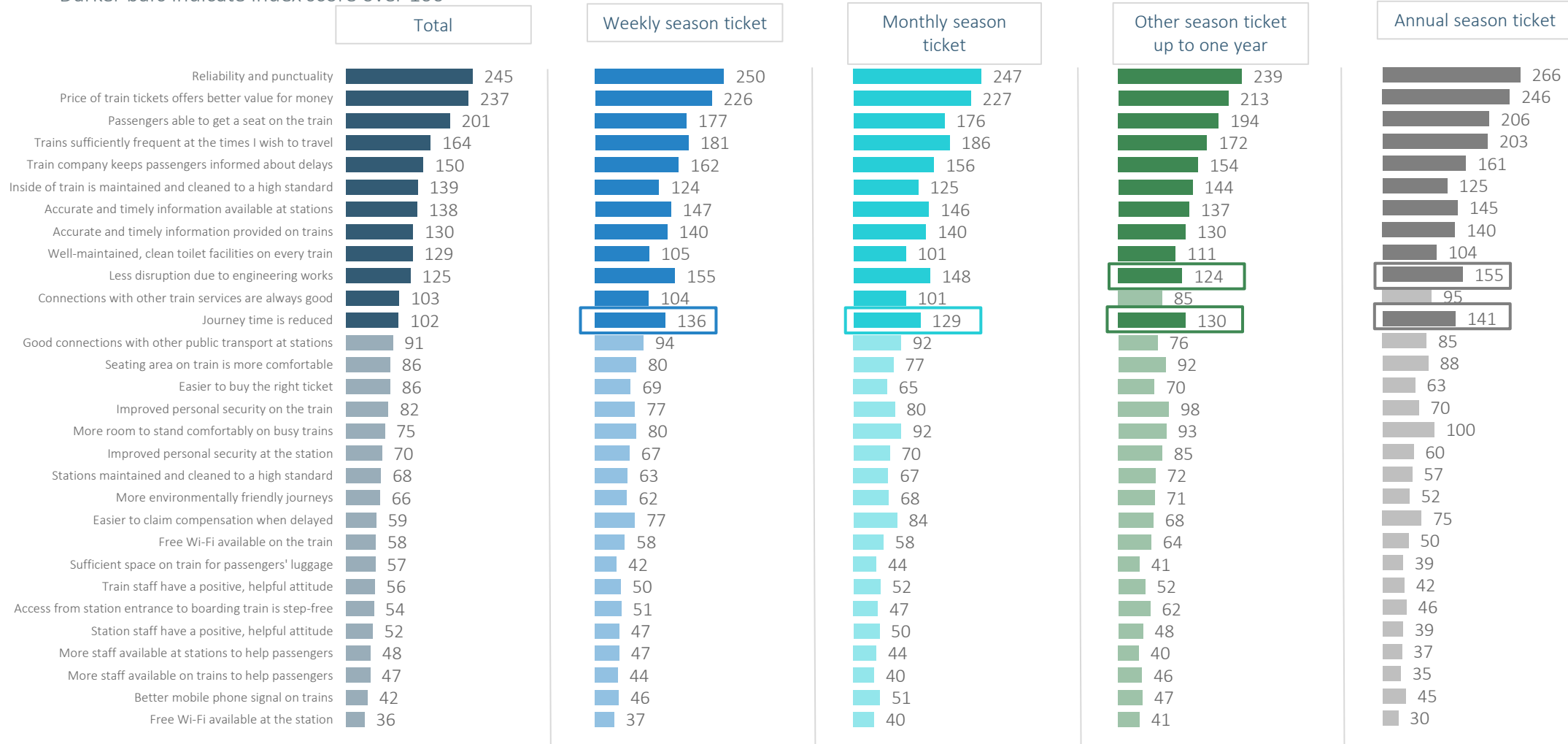
Darker bars indicate index score over 100



# Priorities are largely consistent across non-season ticket groups. Journey time is a key concern for all ticket groups, however toilets are more important for advanced ticket users (likely given journey length), while card users focus more on disruption and public transport connections

## Improvement priorities by Ticket Type [index]

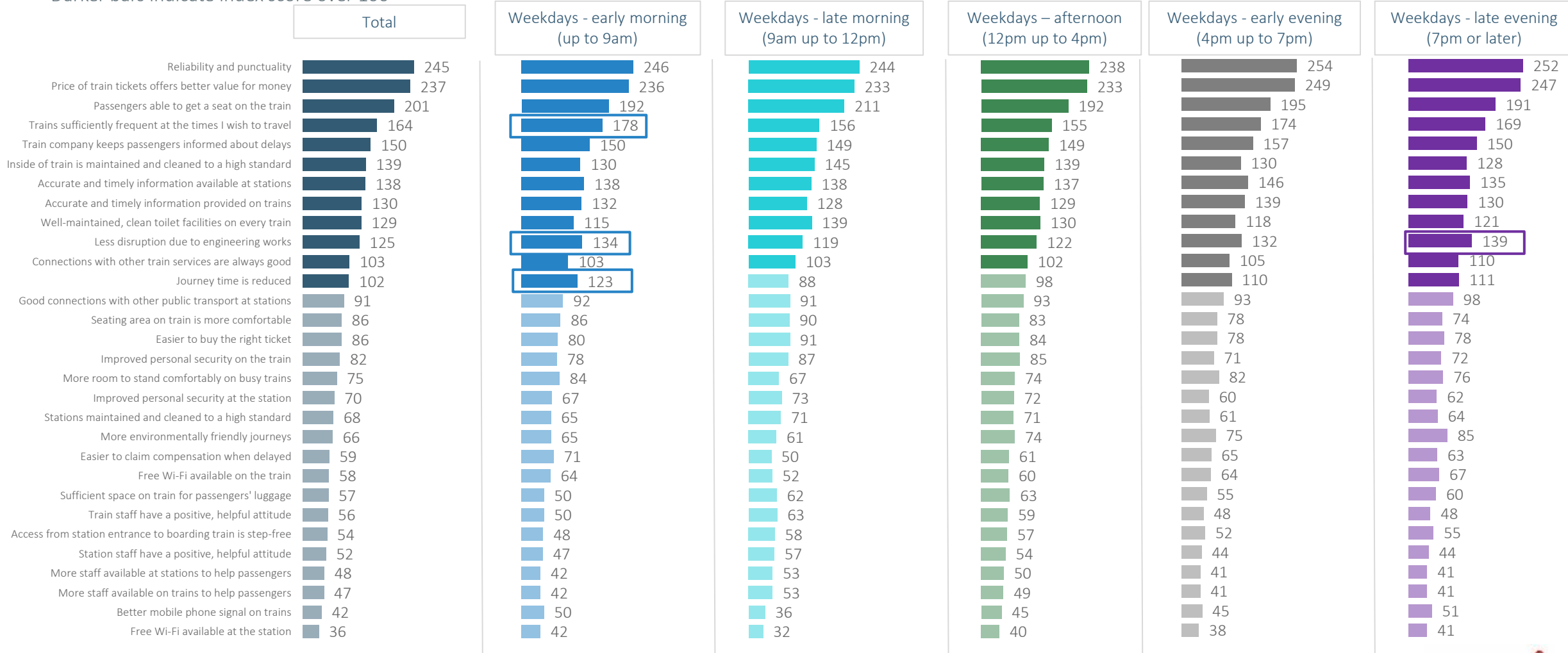
Darker bars indicate index score over 100



# For weekday early morning travellers, train frequency, reduced journey time and less engineering disruption hold greater importance, the latter also key for those who travel in the late evenings

Improvement priorities by **Travel Time** [index]

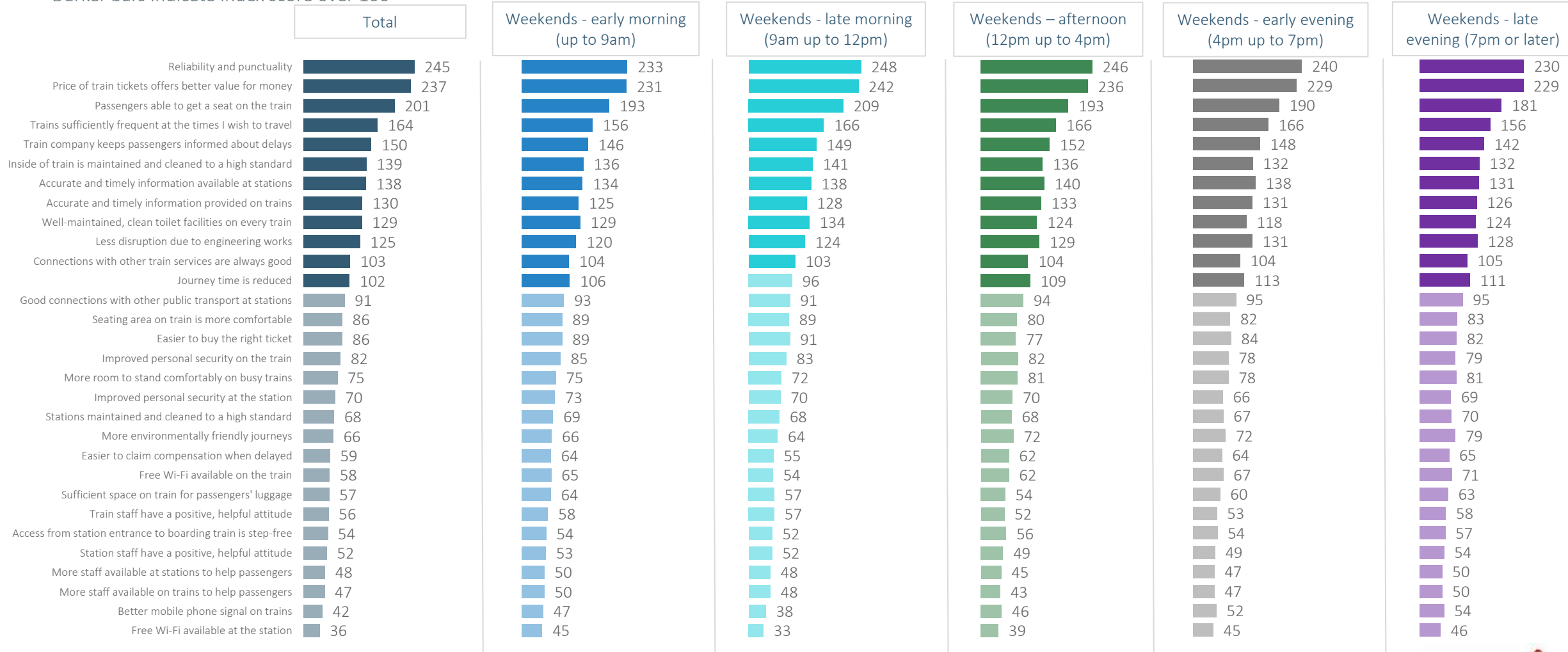
Darker bars indicate index score over 100



# Reduced journey times are particularly important for those who travel during the evening at weekends

Improvement priorities by **Travel Time** [index]

Darker bars indicate index score over 100

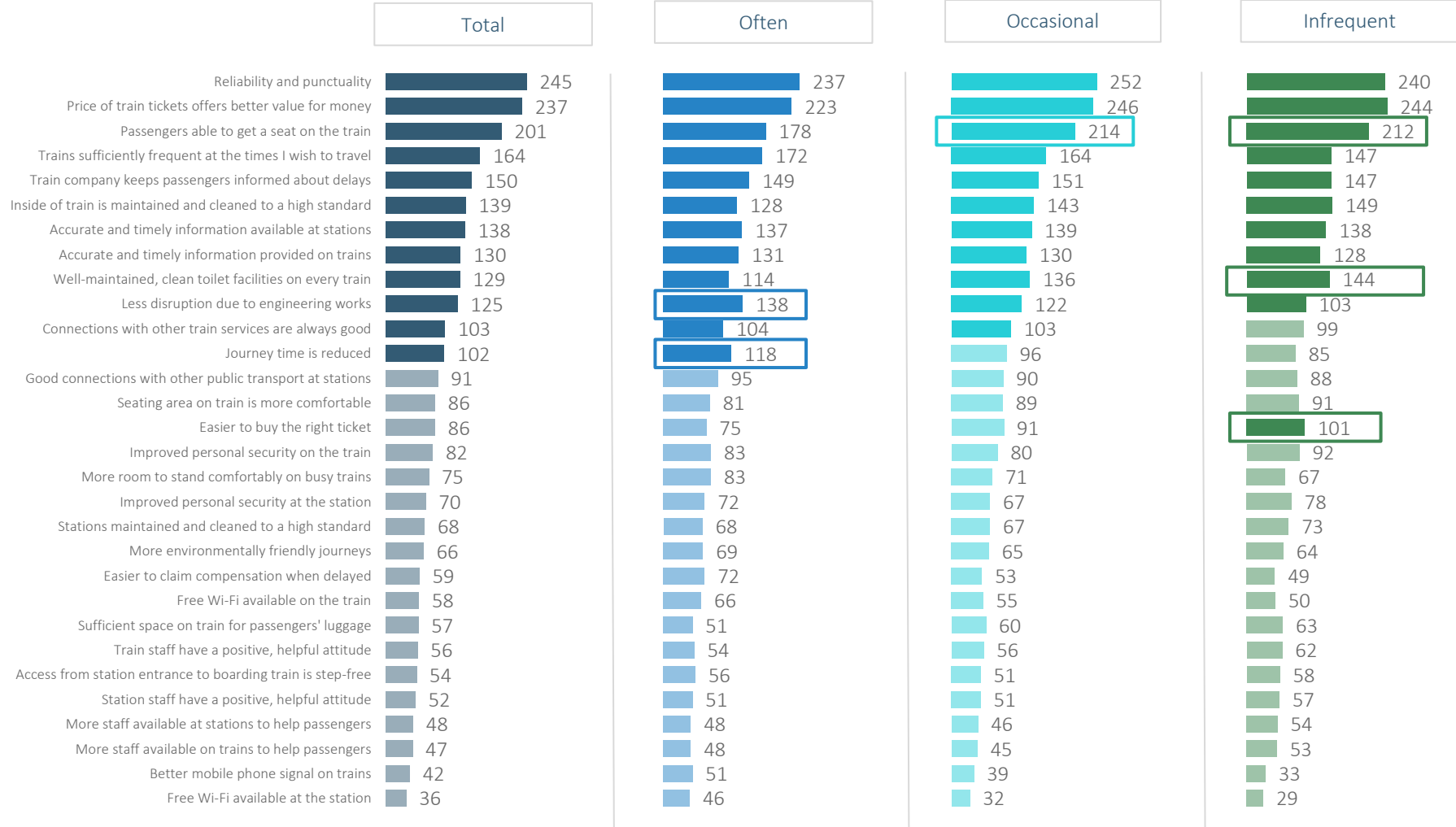




# Regular rail passengers are more focused on disruption and journey times than less frequent passengers. Infrequent travellers would like to see more seating, cleaner toilet facilities and for it to be easier to buy the right ticket

Improvement priorities by Frequency of Rail Travel [index]

Darker bars indicate index score over 100



Often

At least 1-2 times a week for any journey purpose (commuting, business, leisure)

Occasional

1-2 times a month or once every 2-3 months for the highest of the three journey purposes)

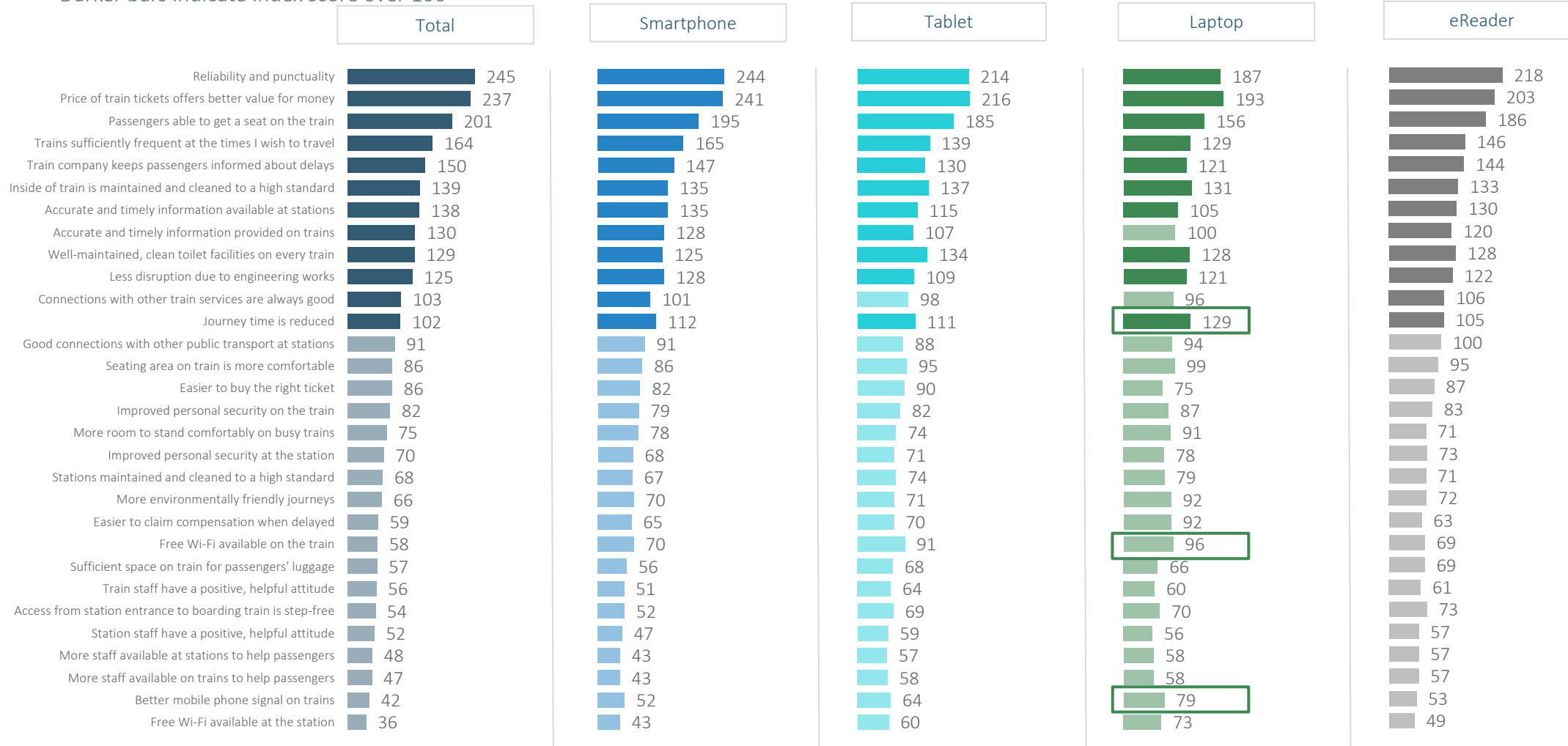
Infrequent

once every six months/12 months/less often for the highest of the three journey purposes)

# Laptop users are more likely to value reduced journey times, better mobile signal and WiFi on trains than the wider passenger population

Improvement priorities by Device Usage (Used Every Journey) [index]

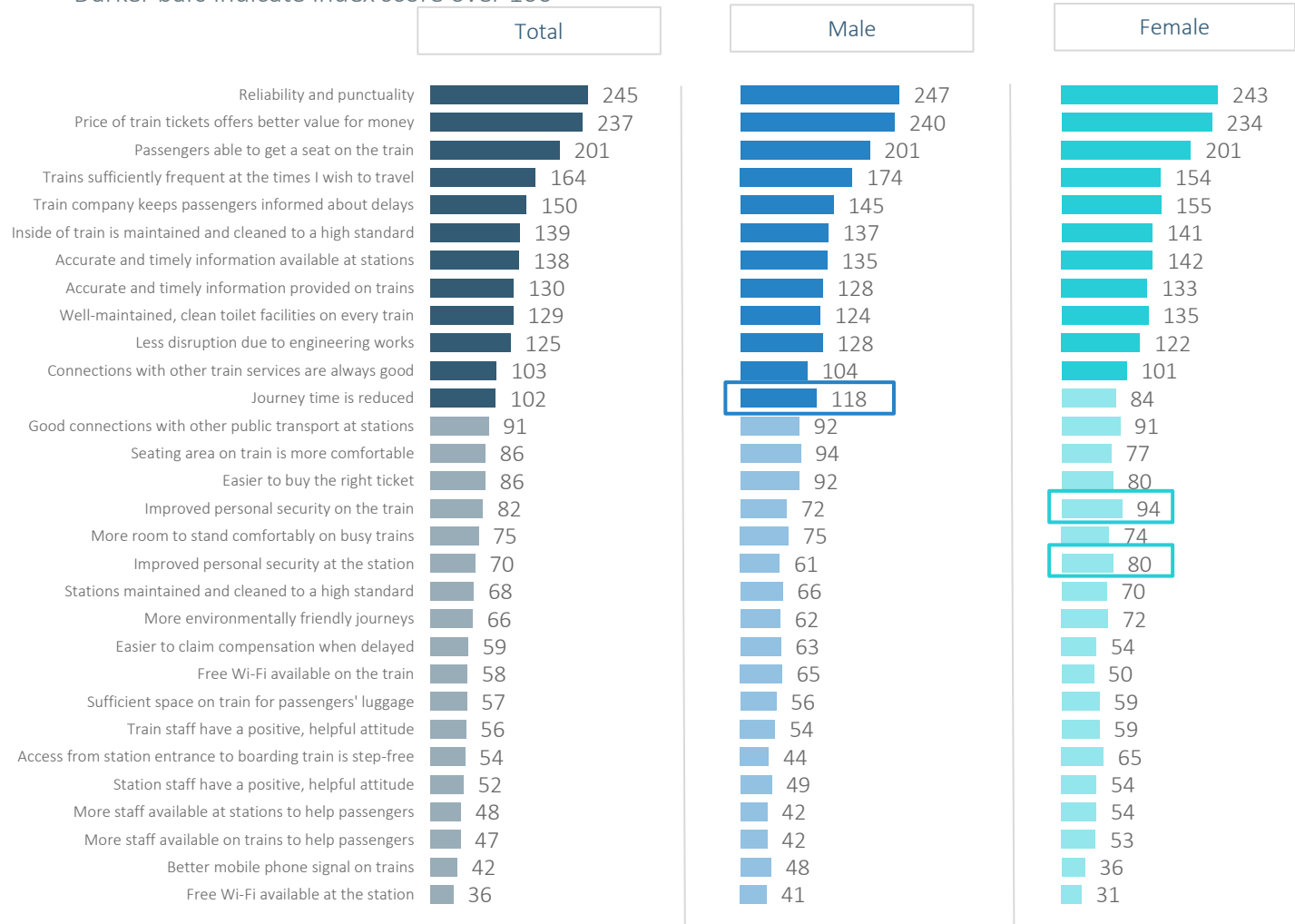
Darker bars indicate index score over 100



# Men, who make up a higher proportion of commuters and full-time workers, are more concerned about journey time. Women would most like to see train and station security improved

Improvement priorities by Gender [index]

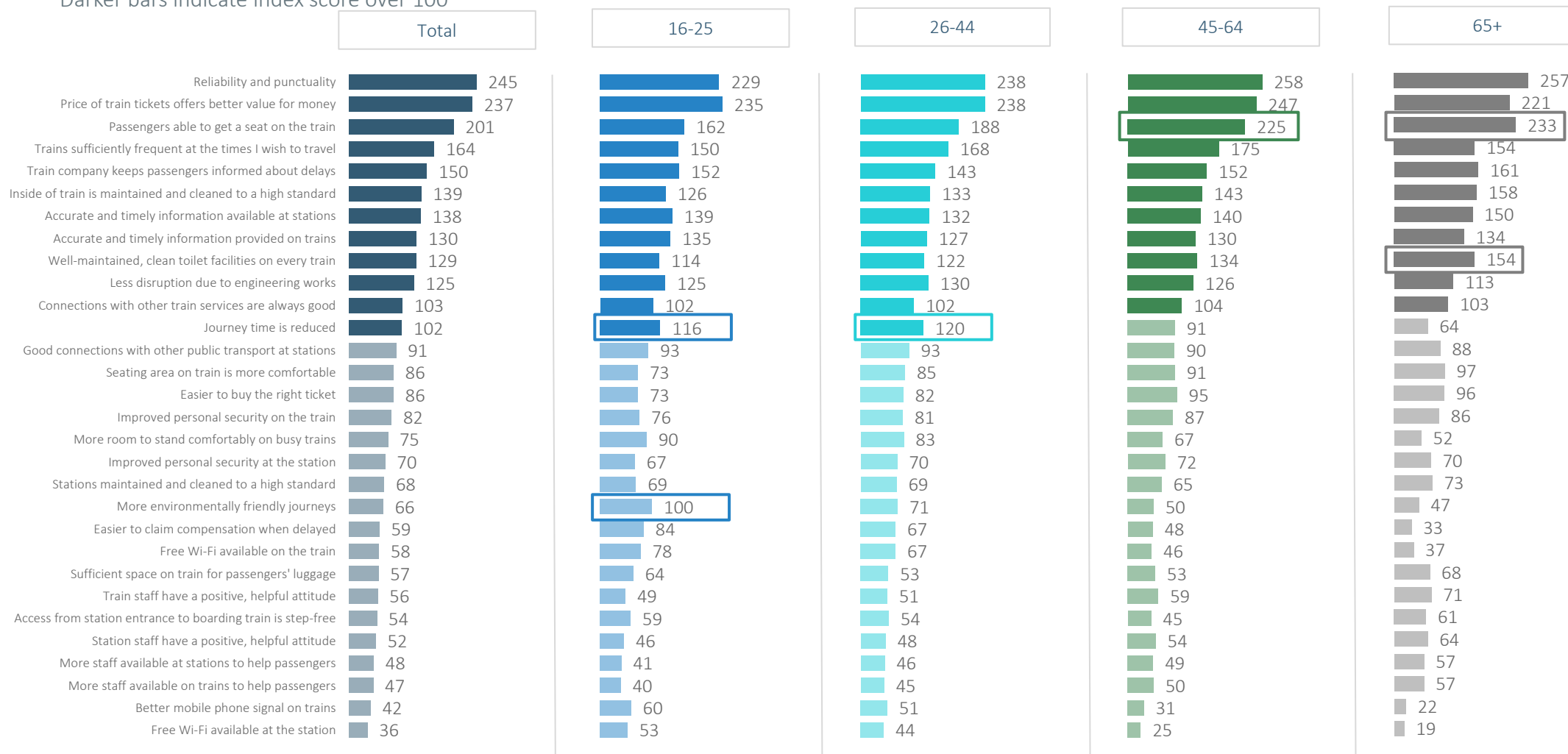
Darker bars indicate index score over 100



# While key priorities remain the same, younger passengers are more concerned about journey times and environmental impact, while older passengers focus more on seating availability and toilets

## Improvement priorities by Age [index]

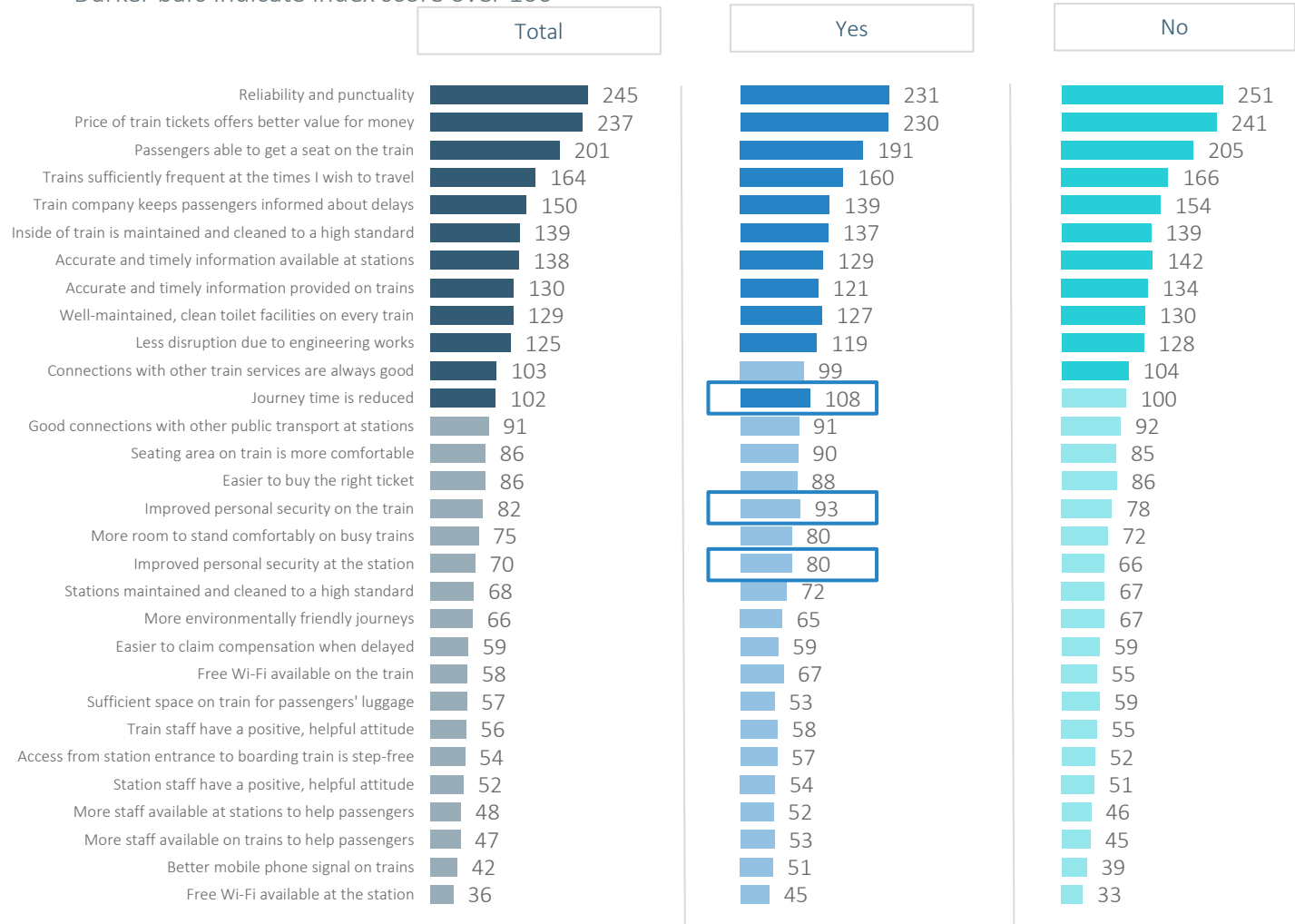
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# While the top rail priorities are consistent, overall journey time and security are slightly more important for passengers with children under 18 at home

Improvement priorities by Whether Have Children Under 18 [index]

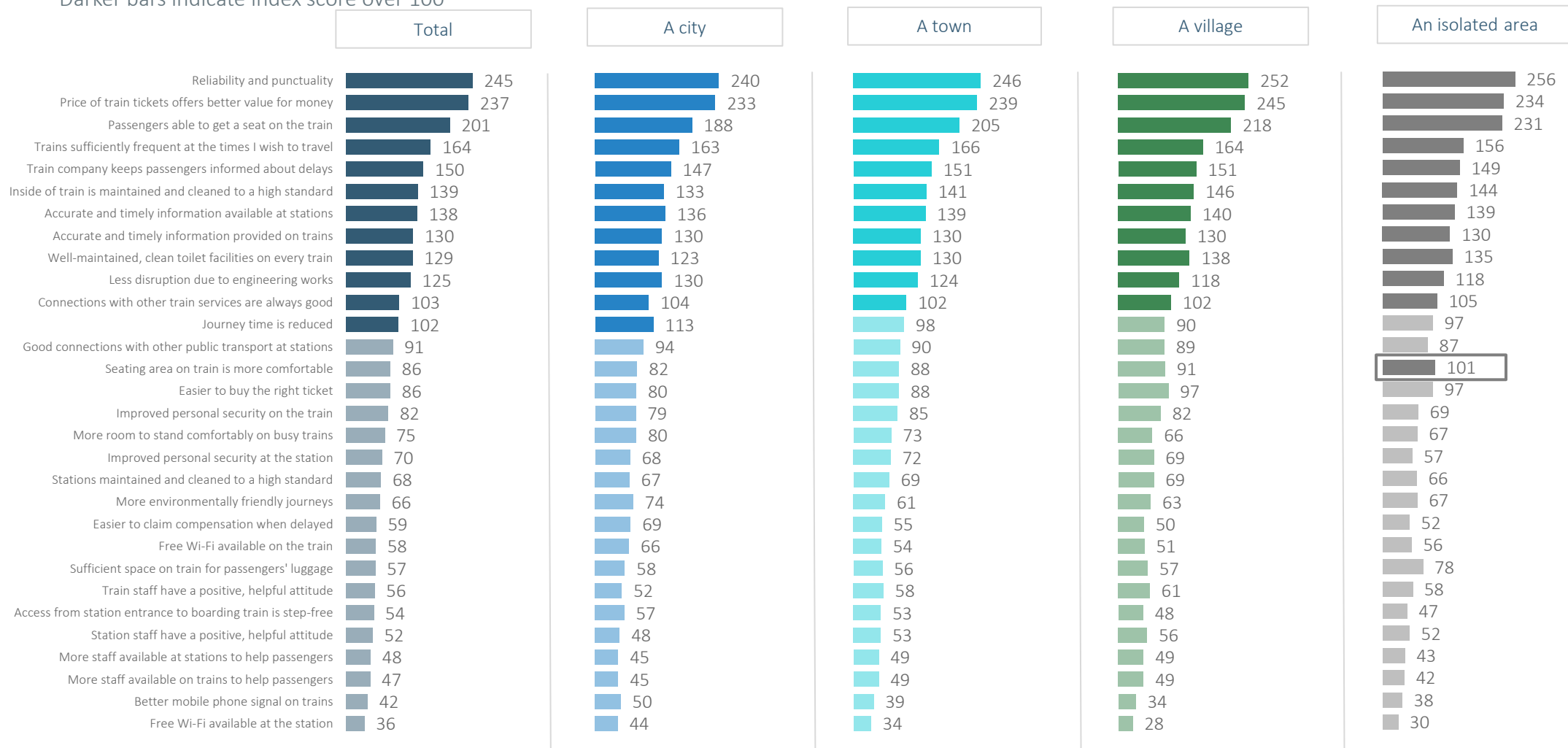
Darker bars indicate index score over 100



# Key improvement priorities are consistent across type of location. Seating comfort is considered a greater concern among those living in isolated areas

Improvement priorities by Urbanisation [index]

Darker bars indicate index score over 100



# Key priorities are consistent between those with and without access to a car

Improvement priorities by Car Access [index]

Darker bars indicate index score over 100

