



Return to rail:

what do passengers want?

July 2021

Introduction

Covid-19 has hit the rail industry, like other public transport and other businesses, hard. But it has had to continue to operate throughout the whole of the pandemic and enabled essential travel during periods of full lockdown for those who needed it.

There have been many examples of success in rail service provision through this time, which we applaud. The industry's response to Covid-19 has shown what can be achieved, as well as highlighting, with a new focus, what is important in providing an excellent rail service.

Transport Focus has been engaging with rail passengers (and non-users) throughout. In March 2021, we conducted a large-scale survey of rail users, supported

by further in-depth, qualitative research. This study as a whole sought to understand passengers' expectations and priorities for rail services in the immediate and longer-term future, and to learn from experiences of rail travel during the Covid-19 pandemic itself.

As we gear up to a return to 'normality', this summary report sets out the key findings from this research, and outlines our resulting recommended priorities for the rail industry. Full reports on both the quantitative and qualitative parts of the study are also available.

As always, our recommendations aim to make sure passengers get the best of what can be achieved, as well as supporting the industry in effectively rebuilding passenger numbers.

The research: context for our findings



Online quantitative survey of **11,479** people

5979

Recent rail users

Travelled by train during recent period of restricted travel

1115

Non-recent rail users (during Covid)

Travelled by train at other points in the pandemic

1885

Lapsed users

Travelled by train before the pandemic, but not at all during

2500

Non-users

Did not travel by train before or during the pandemic (but do not reject train outright)

68

Rail users and lapsed users

To hear about experiences with 8961 individual journeys made Nov 2020 – Mar 2021*

To hear about more general experiences of rail travel Apr – Nov 2020

To further understand attitudes towards returning to rail

To add detail and richness to our survey findings

- Typically younger
- More likely male
- More likely from higher economic backgrounds**
- Quite concerned about Covid-19

- Typically younger but more diverse in other ways
- Less concerned about Covid-19***

- Typically older
- More nervous about Covid-19

*Some schools had returned to some face to face teaching in early March, but the majority of restrictions on movement were in place throughout this period, with travel limited to essential journeys.

**Higher economic background of recent rail users likely reflects that rail provision and patronage is higher in the South East.

***Relatively lower Covid concern likely reflecting that more journeys during this time could be made out of choice, whereas only essential journeys were permitted in early 2021.

Coming out of lockdown: passengers' expectations, needs and priorities

Passengers' expectations for returning to rail

When we spoke to them in March 2021, rail passengers were, on the whole, looking forward to being able to travel by train again. There was pent-up excitement about a return to normal life, in which rail journeys play a key part for many. Most people who travelled by train before the pandemic, expected to continue doing so.

However, while *people* are likely to return to rail, the volume of *journeys* they make overall may be somewhat reduced. As may be expected, those who commuted regularly before the pandemic expected to work from home more often for the foreseeable future. Just over half (52 per cent) commuted to one main place of work or study before the pandemic¹; and while few can predict their working patterns with absolute certainty, this dropped to 44 per cent who expect to do so from now on. Instead,

for example, 10 per cent of former commuters expected to work three days a week from home, and commute for two – up from four per cent before the pandemic.

This means that the industry may need to adapt to provide for a slightly different mix of journey purposes with a higher proportion of leisure and discretionary usage of services. This has potential implications for definitions of peak and off-peak, for different ticket products, and for communications, for example.

The industry will also need to be proactive in attracting people back, ensuring that rail is genuinely appealing given that discretionary travellers may have a choice about which mode to use.

Understanding passengers' triggers and barriers to returning to rail

Despite passengers being keen to return to trains, when this research took place in March 2021 there was still nervousness around spending time in enclosed public spaces, and a great deal of reassurance was required for all passenger groups, regardless of their rail travel experience to date.

To help us to understand the triggers and barriers to returning to rail, survey participants were presented with a number of scenarios, and asked to indicate in which set of circumstances they would feel comfortable travelling by train again. The scenarios took account of three broad areas that could influence decisions about whether to travel:

- measures that train operators themselves put in place to promote Covid safety
- the level of 'openness' in wider society and other public places, as driven by government guidance
- the status of the UK vaccine programme.

The relative influence of different factors is shown in figure two, and tells us that:

1 Factors within operators' direct control had the strongest potential influence in helping to attract passengers back, and helping them to feel comfortable when they do so. These factors were likely to help people reconsider rail more readily than factors relating

to government-led guidance on restrictions, and the vaccine roll-out. Train operators have the potential to help rebuild footfall and deliver positive experiences. They must be proactive in this, and make sure passengers can really see what is being done to help open up rail as an option for travel.

2 Among these manageable factors, most importantly, in March 2021 **passengers needed to know that operators were doing all they could to promote Covid safety**. As of mid July 2021, legal restrictions on face coverings and social distancing have been lifted in England. However, many people are still wary about spending time in enclosed public spaces, and so it remains relevant for operators to continue to visibly promote Covid safety while it remains a risk, and therefore a concern. Specifically, this means:

- providing people with information on how busy trains are, so that those who are still concerned about social distancing can make informed choices
- continuing to reduce the need for contact (through measures such as increased contactless payment and smartphone ticketing)
- maintaining enhanced, visible cleaning
- and for many, continued provision of hand sanitiser at points around stations and on board.

¹ The remainder were a mix of people commuting to more than one 'main' location, and those who commuted on some but not all days of the week.

3 Passengers wanted clear direction on acting in a Covid-safe way, and wanted to see (other) passengers' behaviour on this managed robustly.

When we surveyed passengers in March 2021, a repeated frustration among those who had travelled by train during the pandemic – and a source of real consternation among those who so far had not – was that not all passengers complied with guidance on social distancing, and particularly with face covering requirements. Though there were exceptions, people in this research wanted more clarity and unmissable explanation on *what* the rules were. At the time of the research, many also wanted bolder reinforcement – often even enforcement – of these rules. Effective management of Covid safety behaviours had the third highest influence on propensity to travel, of all factors we measured.

Most passengers were also very willing to *receive* direction, meaning they expected operators to act and speak with conviction here: 77 per cent of everyone we surveyed in March felt that authorities in general have an

important role in promoting Covid safety since 'people can't be trusted'.

Although legal requirements on social distancing and wearing face coverings have now been lifted, learnings from this feedback can still be applied. We need to acknowledge that Covid safety measures (especially face coverings) generate strong opinions, that some people may still prefer to maintain them, and that people appreciate clear direction on these issues. We call for the industry to (continue to) be clear with passengers about the guidance and what is expected of them.

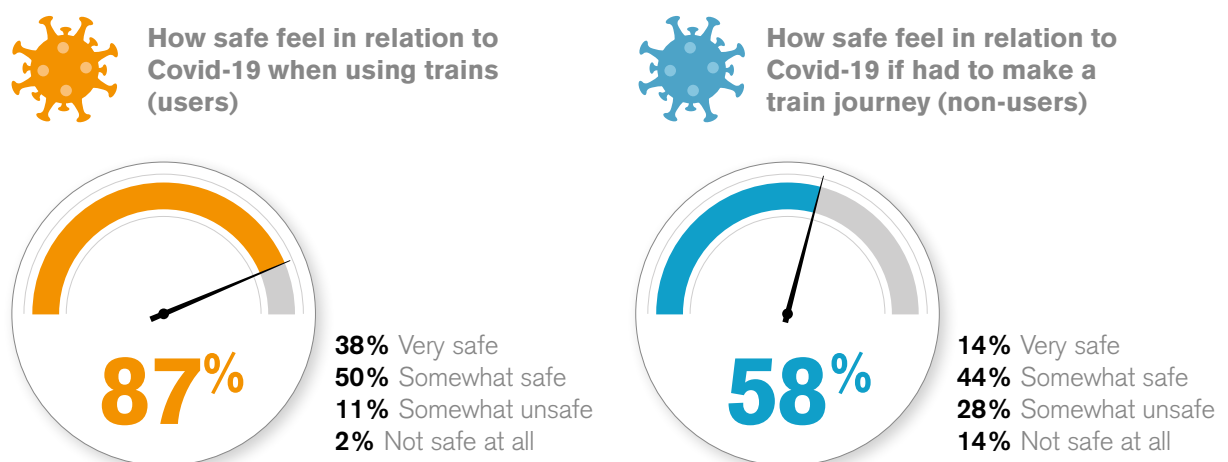
4 Short term financial incentives were popular among participants in the qualitative part of this research. The ideas discussed included new types of railcards, freebies like coffees, days-out bundles with visitor attractions, and discounts akin to 'Eat out to help out'. However, relative to the above **measures which tackle nervousness around Covid directly, short term financial incentives were much less likely to materially encourage incremental increase in rail travel.**

In March 2021 there was still a lot of nervousness around returning to enclosed public spaces and the study highlighted a real strength of feeling, at that time, around managing passengers' Covid safety behaviour.

Despite the recent changes to the rules around social distancing and face coverings (most notably in England from mid July 2021), some of the discomfort that we saw in March is still present. It is echoed, for example, in Transport Focus' more recent, continuous research on attitudes relating to Covid-19. In late

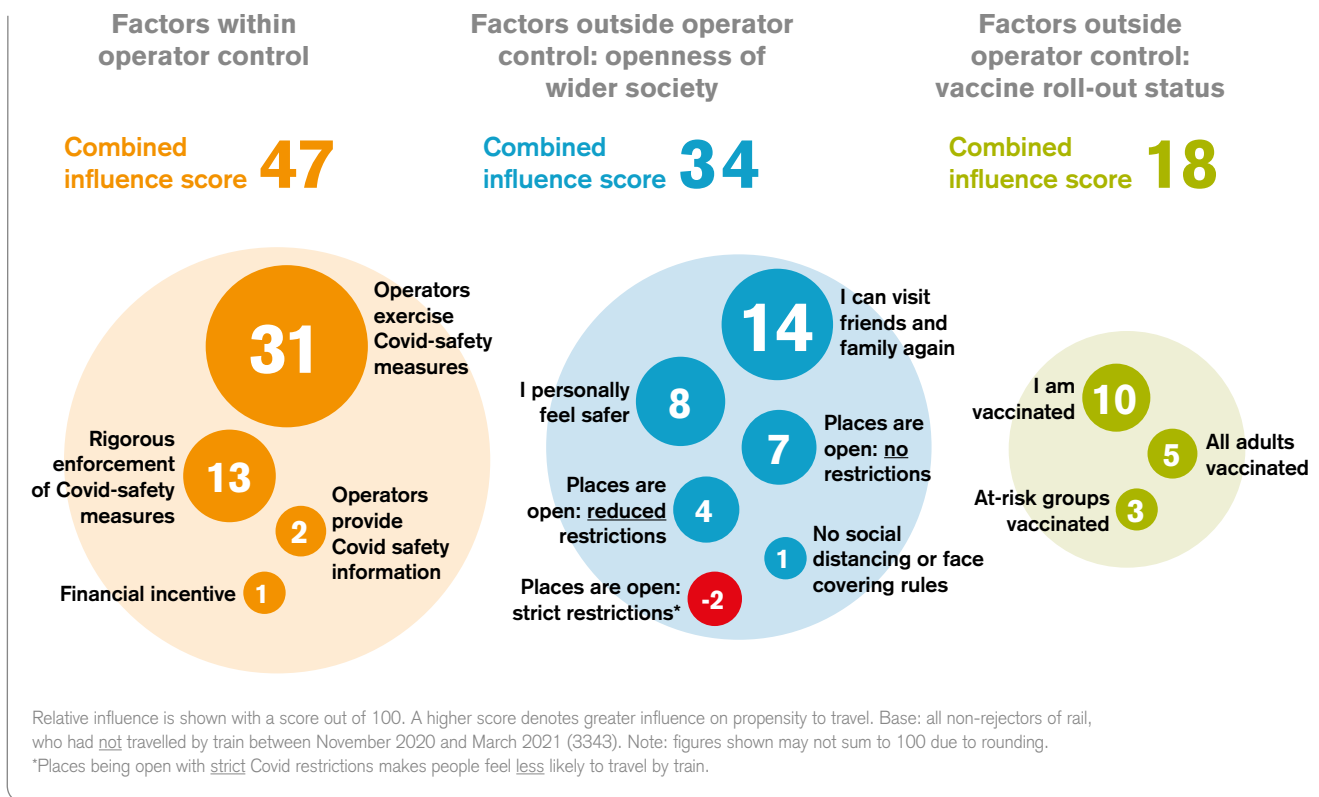
July 2021, 87 per cent of train users felt safe when using trains, but only 58 per cent of those currently not using trains would feel safe (see figure one). This means that many of the concerns and needs expressed by passengers in our March study should still be taken seriously by the rail industry. Operators should continue their efforts to keep passengers safe and to make sure people are aware of the measures in place.

Figure 1. Perceived safety from Covid-19 when using trains



Transport Focus: Passenger confidence barometer. 3 survey waves (weeks) to 18 July

Figure 2. Relative influence of various factors on propensity to travel by train again



Passengers' priorities for rail travel while Covid-19 is still present

In addition to understanding the triggers and barriers to considering rail, survey participants were also asked about their priorities when actually travelling while Covid-19 remains present. Their top five priorities when surveyed in March are shown in figure three.

Reliable service performance remained a key priority, as it always has been. However, perhaps unsurprisingly while the UK was still under strict Covid restrictions, **capacity and space were the most important factors to survey participants in March 2021. On-board cleanliness and ventilation were also crucial.**

We also saw that, for those who had not travelled at all during the pandemic, daily deep cleaning of trains, provision of hand sanitiser on board, and a strict requirement for wearing face coverings were especially important.

Capacity and cleanliness were particularly hot topics for passengers in this study. The qualitative research highlighted some further important points within these priority areas as discussed on the next page.

Figure 3. Relative importance of journey attributes for comfort when travelling

Priority order

- 1** Having enough space (sitting or standing)
- 2** Steps to manage social distancing
- 3** Train(s) punctual and reliable
- 4** Inside of trains well maintained and clean
- 5** Good ventilation on board

Base: all rail users, lapsed users and non-users (11,479)
Importance derived using max diff.

The potential for crowding was passengers' big fear about returning to rail

In the short term, passengers' concerns about capacity in March 2021 were related to Covid safety and the difficulty of keeping distant from others.

Looking ahead, many expected that they would continue to find crowding really undesirable – even unacceptable – in the longer term, but even more so than before. It therefore appears that this could become a defining issue, alongside service reliability, going forward. While it is likely that journey volumes will remain somewhat reduced compared to before the pandemic (due to lower commuting frequency), passengers were fearful that certain services will still be more crowded than is acceptable or comfortable.

Many passengers recognise that crowding is difficult to fully solve, but this does not excuse the need to pro-actively find ways to address it – and to do so in a way that passengers can see. Beyond major steps around improvements to infrastructure and rolling stock, a wide range of management and mitigation measures were seen as beneficial by passengers, and must be actively, visibly and consistently implemented. Popular steps included, for example:

- capacity guidance tools online (preferably live), via apps and in situ at stations/on board, providing information that can empower passengers about when to travel and on which specific train
- more ticket flexibility where capacity is high, giving passengers the choice to use a different train from the one they might have booked, to spread the load
- wide and consistent availability of more flexible season ticket/regular travel options, to better

accommodate fewer than five days per week of commuting. Transport Focus welcomes the steps which are already being made in this area.

- communications and incentives to encourage more travel at off-peak times where possible
- communications – and where possible, practical steps – to encourage more considerate boarding, disembarking, and other behaviour on trains and at stations, in order to reduce jostling.

Cleanliness has always been a priority for passengers; Covid pushed this even further

Crucially, cleanliness measures must be visible: passengers liked to see staff actually doing it, but other evidence was sometimes acceptable – clear communications to describe and reassure about cleanliness steps being taken, for example, were often powerful. The importance of demonstrating cleanliness, though raised in the context of the pandemic during this study, have been echoed in Transport Focus' previous research and will remain true even beyond Covid.

In the short term, hand sanitiser should continue to be provided across the rail network. This was appreciated and is reassuring to some passengers, and is likely to remain so in the immediate future.

Building from now and longer term, hands-free and contactless measures must continue to be developed and implemented at pace: across ticketing, payment (including in station cafes and shops), doors, gates, and so on. Passengers know these things are possible, and many now expect them. At the same time, a safety-net will need to be retained for those who do not have a 'digital' options, and rely on cash.



What can we learn from passengers' experiences during the pandemic?

Passengers' experiences have largely been positive

Passengers were satisfied with 82 per cent of journeys made between November 2020 and March 2021. This was similar across London and South East, regional and long distance services, reflecting that commuters in particular were generally more positive overall during the pandemic than they usually are in our passenger experience research. Indeed, most of those travelling in 2020 also reported that their experience of using the train was at least as good as, if not very often better than expected.

Direct comparisons cannot be reliably drawn between this survey and the National Rail Passenger Survey (NRPS). However, we do consider satisfaction of 82 per cent to be a good result in context of historic satisfaction levels as measured by the NRPS. This is also supported by Transport Focus' Travel During Covid-19 survey which has run throughout the pandemic, recording satisfaction levels at around 80 per cent or higher.

Largely good impressions of the on-board environment (additional cleanliness measures which were noticed and appreciated, ventilation, plenty of space to sit and keep a distance from others), and positive (often better) perceptions of punctuality and disruption handling, helped to drive this.

Now, as restrictions are easing, the industry needs to attract passengers back. **Continuing to provide a good, effective service will be more important than ever**



– and passengers will now rightly hold operators to higher standards, particularly around cleaning measures where they see no good reason for standards to drop.

Figure 4. Satisfaction with train journeys during pandemic

	% satisfied (very/fairly)	% met or exceeded expectations
Overall satisfaction with journey	82	
Sufficient room for passengers to sit/stand	79	91
Cleanliness inside the train	74	90
How well train company looked after passengers for Covid-19 safety	70	91
Punctuality/reliability	78	96
How well train company dealt with any delay	57	NA

Base, 1st column: rail journeys Nov '20 – Mar '21 (>2,164)

Base, 2nd column: passengers who travelled Apr – Nov '20 (1,115)

So what does this positive journey experience mean?

Passengers' experiences highlight two important points:

Firstly, those who were confident enough to use the train during the pandemic – or had no choice – are now aware of the good work that has been done, and felt reasonably comfortable to continue to travel by train. However, those who had stopped using trains during the pandemic, or who rarely used trains beforehand, had received very little information, when surveyed in March 2021, about what it was like to travel by train at this time. One demonstration of this is that 61 per cent of lapsed and non users wanted to know that trains were having regular deep cleans, but only a quarter (25 per cent) believed that this was actually happening. In fact, almost half (49 per cent) of these people had no idea at all of any Covid-safety measures that were being implemented by operators. As a result, qualitative research suggested that, at best, these groups were often nervous to try train travel again, and at worst had a wrong impression about it and were put off from using train again soon.

There was a clear need to reach these lapsed and previously infrequent users, to give them visible, tangible evidence that rail travel is possible and well-managed in terms of Covid safety (it was barely considered by these groups at the time of the research). We expect that this need for pro-active, reassuring communication will continue to be true for the short term, while Covid remains a concern.

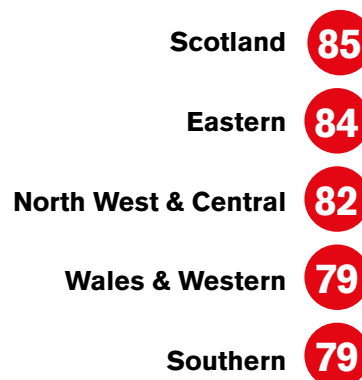
Secondly, while good work has been done, and experiences were largely positive, there were still a minority who had an unsatisfactory journey, and indeed there were variations by region (see figure five).

Notably, 30 per cent of journeys between November

2020 and March 2021 were not satisfactory for how well the operator looked after passengers in terms of Covid (fig. 4). There was still plenty of room for improvement in this key area when this research took place, and the industry must continue efforts to look after passengers, as legal requirements are reviewed. This is likely to remain crucial for encouraging some groups back onto rail, and ensuring they have a good experience when they travel.

Figure 5. Satisfaction with train journeys during pandemic, by Network Rail region

Overall satisfaction with journey
% satisfied (very/fairly)



Base: rail journeys Nov '20 – Mar '21, Eastern (1,660), North West & Central (1,264), Scotland (395), Southern (1,577), Wales & Western (799)

Beyond Covid: key principles for good service delivery remain important

As we have seen, passengers' priorities in early 2021 were focused on capacity and how this is managed, as well as cleanliness, especially on-board. **But other fundamental aspects of rail service provision remained critical even in the context of Covid. In particular:**

- **Train reliability** remained within passengers' top four priorities (indeed it was number one for those who had travelled most recently). This, along with the handling of any disruption, continued to be an important influence on passengers' satisfaction with journeys during the pandemic
- **Value for money perceptions** were a consistent undercurrent in all of our discussions with participants

in the qualitative part of this study. We continue to advocate measures to improve value for money perceptions, alongside continued demonstration of how investment is being made in rail services, for passengers' benefit.

- **Customer-facing staff presence** is more important than ever. In March 2021, passengers' feedback highlighted that staff would play a major role in reassuring passengers as they returned to rail – leading by example on Covid-appropriate behaviour, and a playing a crucial role in the enforcement of this. The research also confirmed that staff continue to be a tangible benefit to passengers. They assist with a

whole range of queries (including specific assistance for disabled passengers); they are also a physical presence to reassure on (and sometimes address) safety issues and anti-social behaviour, beyond Covid.

The rail industry must be more cohesive in the way it speaks and acts towards passengers.

Confusion and complexity isn't new to rail passengers. But our qualitative research showed that Covid has really highlighted this issue. People using the train during the pandemic told us that they experienced inconsistency – both across and within train companies – in the way that operators have dealt with the virus, in the requirements for passengers, and in communications.

We continue to advocate for more joined up working across the industry, and for a stronger sense of overall

accountability for decisions and service delivery, that is visible to passengers. The Williams-Shapps plan for rail and the establishment of Great British Railways provide an opportunity to embed more joined up working and a stronger sense of overall accountability as the rail industry welcomes back its customers.

Among those who used trains rarely, while Covid-safety was a big issue in March 2021, **(perceived) convenience compared to other modes was still the biggest barrier to usage, followed by (perceived) poor service reliability, and cost.** Challenging these perceptions remains a priority for promoting rail travel to a wider audience – and this is arguably more relevant now than ever, as we anticipate a possible drop in journey frequency among the most regular users.

Summary

- People are looking forward to returning to 'normality', and rail travel will play an important part in this.
- The rail industry will need to adapt to and provide for a different pattern of passenger traffic, since daily commuting is anticipated to reduce compared to before the pandemic.
- In March 2021, there was still nervousness around returning to enclosed public spaces, and passengers needed reassurance that operators were doing all they could in terms of Covid safety. Although society and travel has now opened up, the industry will need to continue promoting Covid safety wherever possible, and demonstrating that passengers are looked after.
- The fundamentals of rail service operation – especially punctuality and reliability, and the effective handling of disruption when it happens – remain a high priority for passengers and are crucial for good rail journey experiences.
- Capacity and crowding was passengers' biggest concern during the pandemic, and appears likely to remain a defining issue.
- Measures to promote cleanliness must be here to stay, and visible to passengers.
- The delivery of rail services during the pandemic was largely successful from passengers' perspective, and measures put in place to manage the Covid risk were noticed and appreciated (especially around cleaning).
- Operators now need to build on this:
- There was room for improvement, and there will be no place for complacency while Covid remains present.
- People who had not travelled during the pandemic were relatively unaware (in March 2021) of how the railways were providing for their needs in relation to Covid. Continuing to reach out to these groups is likely to remain important in the short term, to help rebuild patronage.
- This can be viewed as a unique, optimistic moment in time. Going into summer 2021, a number of factors are in place which present the industry with a great opportunity to re-appraise the way it interacts with the public, focussing on customer service and making people want to travel by train:
 - the public looks forward to a return to normality once the threat of Covid including current and potential future variants – is reduced, and is receptive to encouragement and reassuring messages
 - the industry has learned from the last 16 months and has improved tools and processes for operations like cleaning and enabling passengers to make informed choices around crowding
 - we have government-endorsed efforts towards wholesale industry reform.

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Transport Focus is the operating
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