# Return to rail:
# what do passengers want?

Research report – quantitative phase of the interim rail passenger survey

July 2021

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# Contents

*Fieldwork for this project was carried out in March 2021*

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# Background

## Update passenger satisfaction during Covid-19 and identify initiatives to prompt future usage

As a result of the Covid-19 pandemic, it was not possible to conduct the bi-annual National Rail Passenger Survey (NRPS) in Autumn 2020 and Spring 2021. For this reason, this has created a significant gap in the feedback provided to train operating companies (TOCs) on passenger experience and satisfaction.

Therefore, Transport Focus wanted to adapt the NRPS methodology and questionnaire to reflect the current train travel situation and provide the industry with an update on their performance to fill this gap. They also wanted to update the priorities TOCs should focus on to drive satisfaction reflecting customer requirements during Covid-19. In addition to this, Transport Focus had identified the need to understand the barriers and motivations for future rail usage amongst lapsed users and new potential users to provide guidance to the industry on how best to meet passenger demand and needs, as footfall resumes.

With this in mind, BVA BDRC conducted a large-scale quantitative survey with the aim of bridging the gap in current performance data for each of the TOCs and providing recommendations on how to maximise satisfaction and future passenger volumes. This research followed a qualitative element in early 2021, which explored current and future perceptions of train usage, and this fed into the design of the current research. A second, more detailed, qualitative stage was conducted in March 2021 and this report makes reference to some of the findings from that stage.

Specifically the research wanted to understand the experiences of rail passengers and their perceptions of the sector as a result of the pandemic and what the longer term impact may be with regard to rail usage.

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# Methodology

Online survey targeting a nationally representative panel (16+ years old) base and achieving 11,479 completes. Data was weighted and the full explanation of the weighting can be found in a separate document - *Weighting data for the Interim Rail Passenger Survey.*

- Fieldwork ran from 8th March to 31st March 2021.
- The sample was drawn from two sources – online panels (n=8,419) and social media recruitment (n=3,060)
- To qualify, respondents had to live in Great Britain (England, Scotland or Wales)
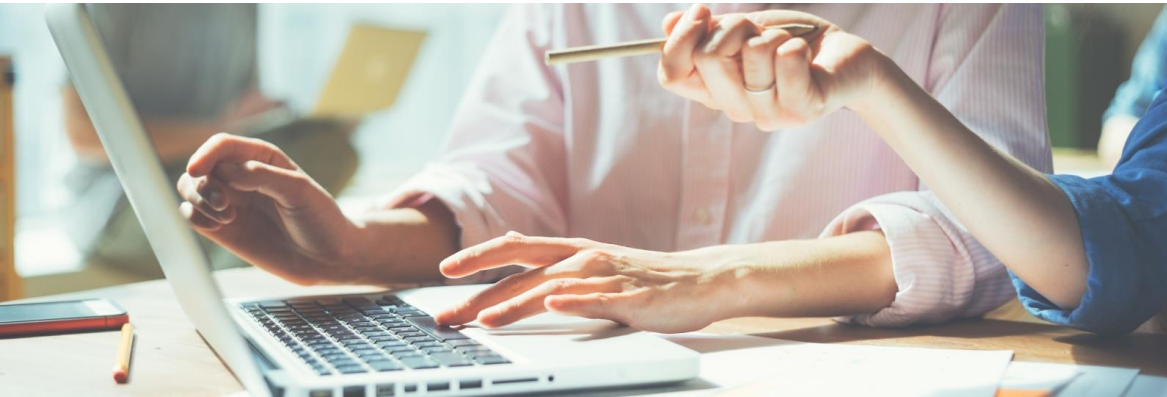
For every journey metric including overall satisfaction for recent users, we considered every leg of their most recent journey or their second most recent journey. This means in some analyses one respondent will be counted multiple times if they have made multiple journeys. For more information, refer to the *Weighting data for the Interim Rail Passenger Survey.*

**Robust sample sizes were achieved for each of the four main user segments in the survey:**

## Recent users (n=5,979)

Any respondent who used the train in the last 3 months

## Non-users (n=2,500)

Any respondent who used the train less than once every 6 months pre Covid-19 or not at all and not used since; had to be non-rejecter of trains

## Non-recent users (n=1,115) – shown as one user group in the report

Within this segment are four further groupings, though no specific sample size was set for these:

- **Continuous light users** (used the train less than once every 6 months before Covid-19, used at least once since first lockdown in March 2020 but not within the last 3 months) (n=85)
- **Reduced users** (used the train more than once every 6 months before the pandemic and used at least once since first lockdown in March 2020 but not within the last 3 months) (n=1,010)
- **Light new users** (did not use the train before Covid-19 and used once since Covid-19 but not in the last 3 months) (n=20)

## Fully lapsed users (n=1,885)

Any respondent who used the train more than once every 6 months before the pandemic but has not used during the pandemic

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# Key summary (1)

## Based on fieldwork conducted in March 2021

**Passengers' priorities while Covid-19 continues to impact daily life**

The top priorities for train usage (across all user segments) are related to crowding:

- Having enough space (sitting or standing)
- Steps being taken to manage passenger flow and help with social distancing

It seems imperative that the sector does not return to the crowding issues from before the pandemic.

The third most important priority is punctuality, followed by two Covid related priorities cleanliness and good ventilation (although cleanliness is not just Covid related).

Recent users put a greater emphasis on punctuality, frequency and speed.

For fully lapsed and also non-users space and crowd control as well as Covid related priorities are of greater importance

- Need for train operators to communicate these points to get these users back or to win them as new users

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# Key summary (2)

## Based on fieldwork conducted in March 2021

### Looking ahead

Future rail usage will depend on a number of aspects outside the control of the sector.

It seems that people are confident employment will return to previous levels but commuters will be travelling fewer days a week for work.

Based on scenarios put to respondents, this study provides guidance on factors that can drive likelihood to travel.

- The strongest individual driver is that train operators have Covid measures in place. This is something that they can actively influence.

- However, it is also important that user segments (particularly non-recent and lapsed users) are aware of such measures.

- Another considerable key driver of propensity to travel that is within the control of train operators is that there is rigorous reinforcement of the rules in place (wearing face coverings and social distancing).

- People visiting friends and family again is a stronger driver but the sector cannot influence this.

- That train operators provide plenty of additional Covid safety information has some impact on future rail travel but considerably less so than other factors.

- A financial incentive has only a very small impact.

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# Key summary (3)

## Based on fieldwork conducted in March 2021

### Lapsed, reduced and non-users: challenges for the industry as greater freedoms approach

Main reasons for reduced usage (including recent and fully lapsed users) are:

- Following government guidelines
- Fewer leisure occasions
- Concerned about catching Covid
- Concerned about spreading Covid
- Able to work from home

Train operators can exercise some influence on 2nd point by advertising leisure activities along their networks.

For non-users the main reasons for not using the train are Covid related when combined. Individually the key reason is that travelling by another mode of transport is more convenient so the sector must promote the convenience of using the train. The fact that there are fewer leisure occasions is also a principal deterrent, so advertising leisure activities is relevant for this segment as well.

The Covid-19 safety measures that lapsed and non-users most want to see are:

- Daily deep clean
- Hand sanitiser available on board
- Enforcing passengers to wear face coverings on the train (unless exempt)
- Ensuring social distancing at stations
- Daily deep clean of stations

There is, however, an information gap between the measures people want to see and those they believe are currently in place. Some of these requirements are, of course, not in place or not feasible - these may need to be managed by communications in order to handle expectations.

Lapsed and non-users' main channels to inform themselves as to what measures are in place are TV news and other TV programmes, radio but also train operator websites – particularly for lapsed users.

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# Key summary (4)

## Based on fieldwork conducted in March 2021

### The journey experience during 2020 and early 2021

This survey was administered very differently from the most recent National Rail Passenger Survey (NRPS) in Spring 2020 just before the pandemic started so satisfaction results are not directly comparable. However, close interrogation of the data has led us to conclude that satisfaction during early 2021 was generally similar (for different reasons) to Spring 2020. Overall journey satisfaction has been quite positive during the pandemic, clocking in at 82%. Variation between train operator companies (TOCs) is between 76% and 95%.

Overall journey satisfaction was fairly similar across sectors: 81% London & South East, 84% Long distance, and 83% Regional.

Slightly more attributes had higher scores on average than in Spring 2020.

**At a national level the attributes which passengers were typically more satisfied with during early 2021 were:**

- How the train company dealt with a delay
- Value for money
- Sufficient room for all passengers to sit/stand comfortably
- Punctuality/reliability

**The attributes that passengers were typically less satisfied with were:**

- Frequency of the train on that route
- Toilet facilities

Some of these difference compared to Spring 2020 can be explained with how train travel has developed as a result of the pandemic.

The greatest key driver on overall satisfaction was the experience on the train (rather than external factors) which means satisfaction can be largely influenced by train operators themselves. Cleanliness, comfort of seats and sufficient ventilation were the main drivers to impact on the train experience.

Satisfaction for the whole journey when using multiple TOCs was lower when more than two TOCs were used (74%).

Overall station satisfaction was slightly higher than journey satisfaction at 83%.

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# Key summary (5)

**Based on fieldwork conducted in March 2021**

## Rail users during the pandemic: who they were

- Profile varies quite notably from the other user segments in that it is considerably younger (41% 16-34 years) and more male dominant (56%)
- Recent users are more likely to reside in London and the Southeast and possibly as a result record a higher proportion of social grades ABC
- Two in five travel at least weekly during morning or daytime off-peak, very little during other times (65% vs. 35%)
- Almost all journeys are made for non-work reasons or commuting

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# Rail user segments – who has been travelling and who hasn't?

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# Explanation of user segments

**33%** **Recent users**

Comprised of users who have used trains as a method of transport within the last three months and may or may not have used trains before and during Covid-19

**13%** **Non-recent users**

Comprised of users who used trains as a method of transport before Covid-19 at least once every 6 months, and have used them less or at the same level during the pandemic but not in the last three months; also includes those that did not use trains before the pandemic but used them during the pandemic, albeit not in the last three months

**23%** **Fully lapsed users**

Comprised of users who used trains as a method of transport before Covid-19 at least once every 6 months, and have not used it at all during the pandemic

**31%** **Non-users**

Comprised of people who did not use trains as a method of transport before Covid-19 or less than once every 6 months and have not used them during the pandemic

*Weighted figures providing an estimate of the proportion of all rail non-rejectors who fell into each group during early 2021*

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# Summary: Profile of recent users

Predominantly **younger males**

**54%**

of last journeys were non-work trips

**37%**

were commutes

**More likely to be from:**

**London**

**Social grades ABC1**

**2/3 journeys**

last less than an hour with 40% made during daytime off-peak, 25% during morning peak

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# Train user segments – gender and age

**The recent user profile stands out from the other segments in that it is considerably younger and also much more likely to be male**

## Recent Users

**Gender**

56    44

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 14 | 27 | 19 | 17 | 22 |

## Non-recent Users

**Gender**

44    55

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 23 | 14 | 13 | 12 | 36 |

## Fully Lapsed Users

**Gender**

46    54

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 11 | 12 | 12 | 14 | 51 |

## Non-Users

**Gender**

42    58

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 9 | 11 | 15 | 17 | 47 |
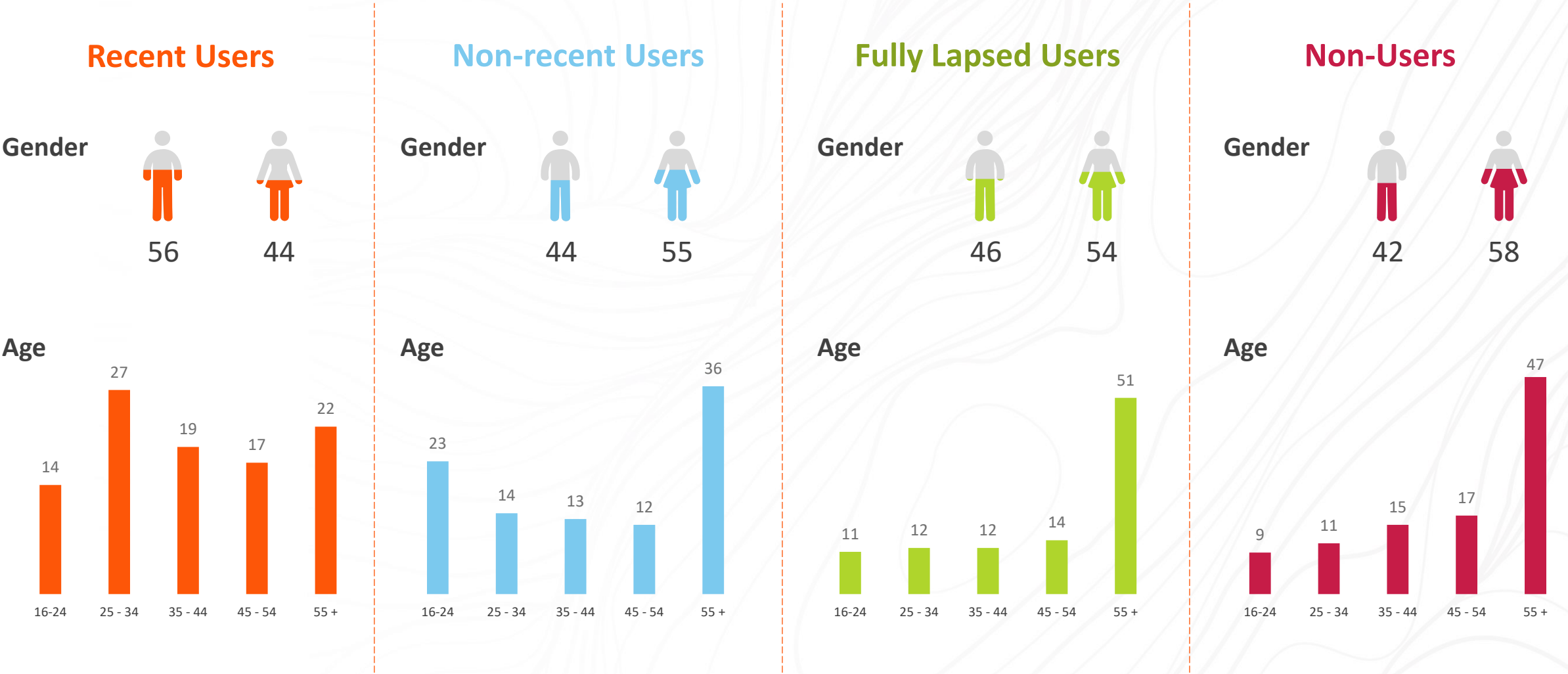
*Fieldwork for this project was carried out in March 2021*

S2 Are you….?; S3 Please type in your age.
Base: Recent Users n = 5,979; non-recent Users n = 1,010; Fully lapsed n = 1,885; Non-users n = 2,500

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# Train user segments – region & social grade

**Recent users are also more likely to reside in London and the Southeast; probably linked to the fact that a substantially higher proportion are from social grades ABC compared to the other user segments**

## Region

- Recent Users
- Non-recent Users
- Fully Lapsed Users
- Non-Users



**Scotland**
- 9
- 7
- 9
- 8

**North West**
- 10
- 11
- 14
- 10

**West Midlands**
- 8
- 10
- 9
- 9

**Wales**
- 3
- 4
- 6
- 6

**South West**
- 6
- 8
- 8
- 12

**North East**
- 2
- 4
- 4
- 6

**Yorkshire and the Humber**
- 6
- 10
- 9
- 11

**East Midlands**
- 3
- 6
- 8
- 11

**East of England**
- 9
- 9
- 10
- 10

**London**
- 26
- 14
- 9
- 5

**South East**
- 16
- 16
- 14
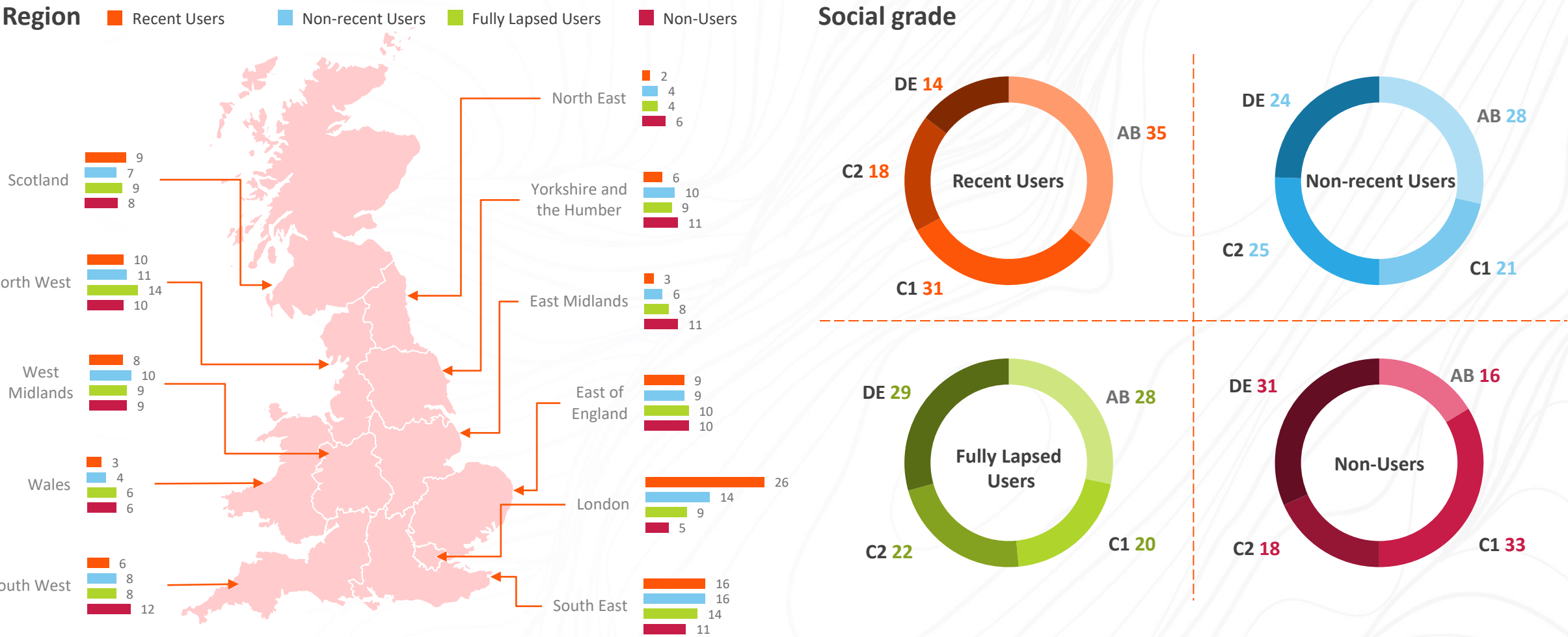- 11

## Social grade

### Recent Users
- DE 14
- AB 35
- C2 18
- C1 31

### Non-recent Users
- DE 24
- AB 28
- C2 25
- C1 21

### Fully Lapsed Users
- DE 29
- AB 28
- C2 22
- C1 20

### Non-Users
- DE 31
- AB 16
- C2 18
- C1 33
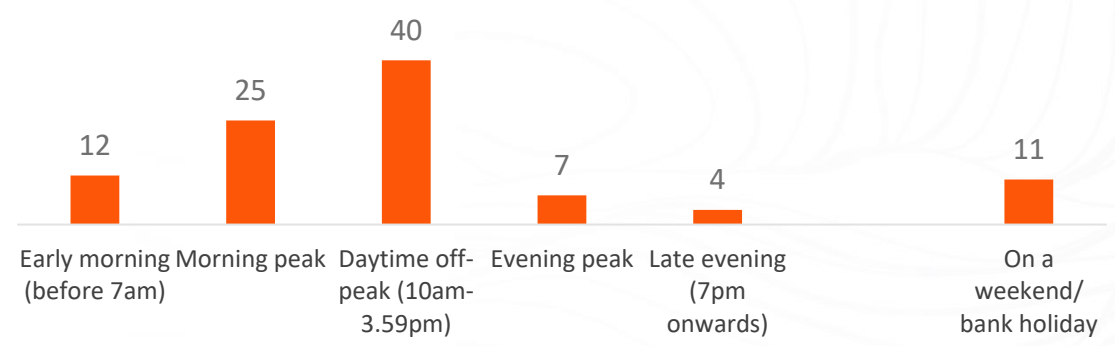
*Fieldwork for this project was carried out in March 2021*

S4 Where have you lived for the majority of the time in the past 6 months?; S5 Please indicate which occupational group the Highest Income Earner in your household belongs to, or which group fits best.
Base: Recent Users n = 5,979; Non-recent Users n = 1,010; Fully lapsed n = 1,885; Non-users n = 2,500

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# Recent users – travel patterns

**Business travel was reduced to a very small proportion in the last three months; the vast majority of train journeys were for non-work reasons or to commute during the morning peak or daytime off-peak; it is worth noting that almost 2 in 5 travelled at least weekly**

## Time of day

| Category | Value |
|---|---|
| Early morning (before 7am) | 12 |
| Morning peak | 25 |
| Daytime off-peak (10am-3.59pm) | 40 |
| Evening peak | 7 |
| Late evening (7pm onwards) | 4 |
| On a weekend/ bank holiday | 11 |

## Purpose of trip

**37** Commute

**9** Business

**54** Non-work

## Length of journey

- 3+ hours **7**
- 1-3 hours **26**
- 30-59 minutes **30**
- Less than 30 minutes **37**

## Frequency

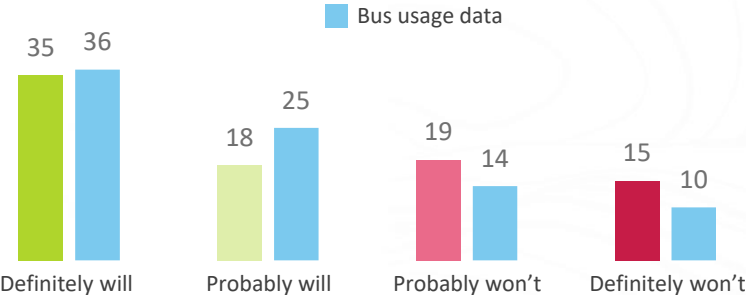| Category | Value |
|---|---|
| 4-5 times a week | 15 |
| 1-3 times a week | 23 |
| 1-3 times a month | 25 |
| More than once a year | 32 |
| Less than once a year | 5 |
| It was the first time | 5 |
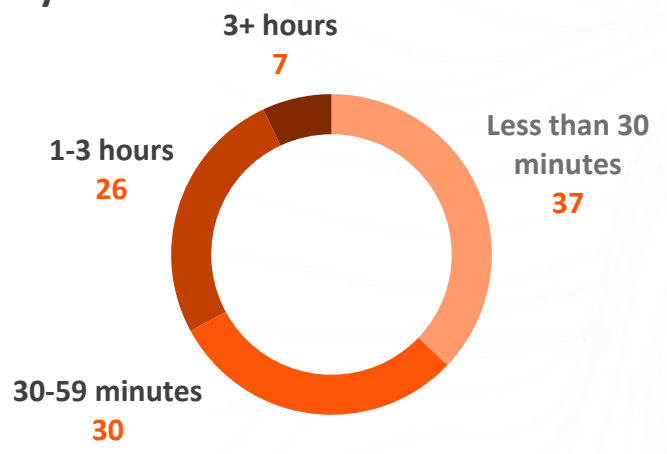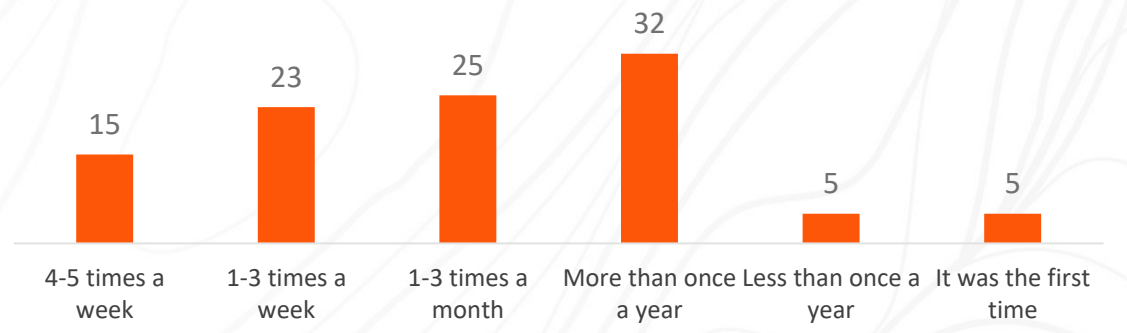
*Fieldwork for this project was carried out in March 2021*

1.4 And did you depart from…?;  1.6 What was the main purpose of your most recent journey?;
1.7 How long did it take you to travel between [START STATION] and [DESTINATION STATION]?; 1.8 How often
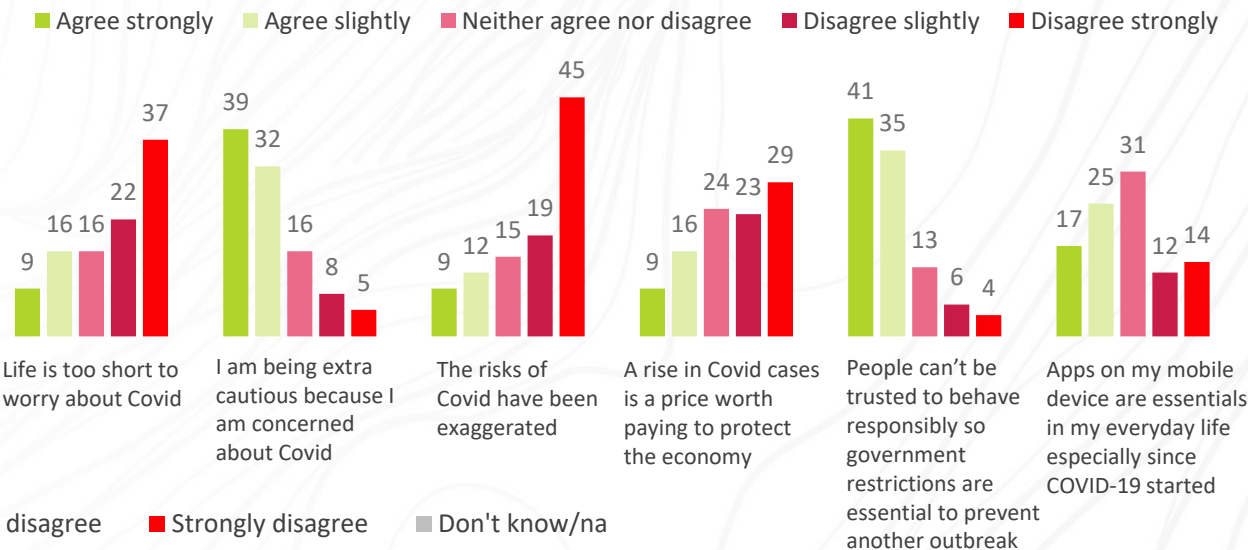do you currently make the train journey? Base: All recent users n = 5,771

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# Overall future train users and attitude statements

**Around 1/3 suggest they 'definitely will' travel again, comparable with bus use. The majority of respondents are being extra cautious as a result of Covid and around 1/4 are very confident they will return to public transport as much as before the pandemic**
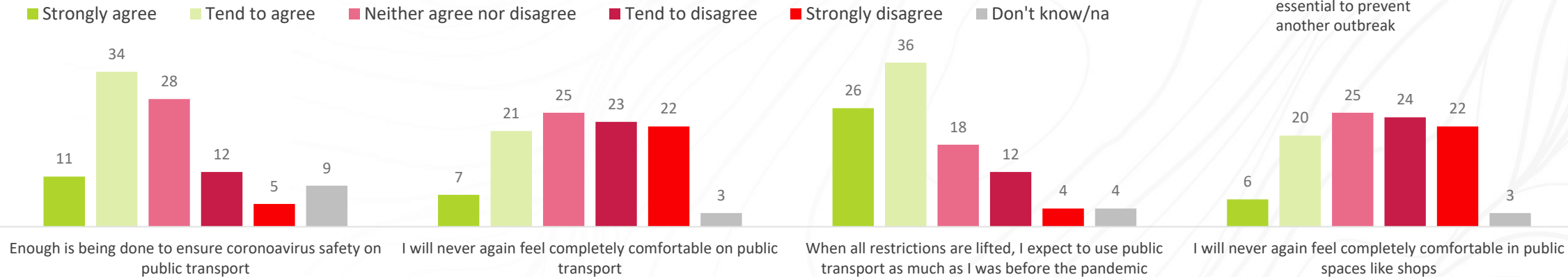
## Future train usage

Bus usage data

| Category | Train | Bus |
|---|---|---|
| Definitely will | 35 | 36 |
| Probably will | 18 | 25 |
| Probably won't | 19 | 14 |
| Definitely won't | 15 | 10 |

## Attitudes to life and the Covid-19 pandemic

Legend: Agree strongly | Agree slightly | Neither agree nor disagree | Disagree slightly | Disagree strongly

| Statement | Agree strongly | Agree slightly | Neither agree nor disagree | Disagree slightly | Disagree strongly |
|---|---|---|---|---|---|
| Life is too short to worry about Covid | 9 | 16 | 16 | 22 | 37 |
| I am being extra cautious because I am concerned about Covid | 39 | 32 | 16 | 8 | 5 |
| The risks of Covid have been exaggerated | 9 | 12 | 15 | 19 | 45 |
| A rise in Covid cases is a price worth paying to protect the economy | 9 | 16 | 24 | 23 | 29 |
| People can't be trusted to behave responsibly so government restrictions are essential to prevent another outbreak | 41 | 35 | 13 | 6 | 4 |
| Apps on my mobile device are essentials in my everyday life especially since COVID-19 started | 17 | 25 | 31 | 12 | 14 |

## Key comfort statements

Legend: Strongly agree | Tend to agree | Neither agree nor disagree | Tend to disagree | Strongly disagree | Don't know/na

| Statement | Strongly agree | Tend to agree | Neither agree nor disagree | Tend to disagree | Strongly disagree | Don't know/na |
|---|---|---|---|---|---|---|
| Enough is being done to ensure coronoavirus safety on public transport | 11 | 34 | 28 | 12 | 5 | 9 |
| I will never again feel completely comfortable on public transport | 7 | 21 | 25 | 23 | 22 | 3 |
| When all restrictions are lifted, I expect to use public transport as much as I was before the pandemic | 26 | 36 | 18 | 12 | 4 | 4 |
| I will never again feel completely comfortable in public spaces like shops | 6 | 20 | 25 | 24 | 22 | 3 |

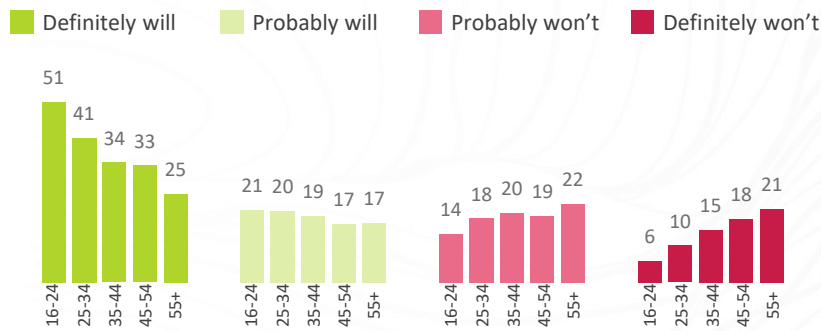*Fieldwork for this project was carried out in March 2021*

S6 How likely are you to travel by train on National Rail services, including London Overground, when Covid-19 is no longer considered a danger and things have returned to "normal"? Base: Train rejectors and non-rejectors n = 17,486

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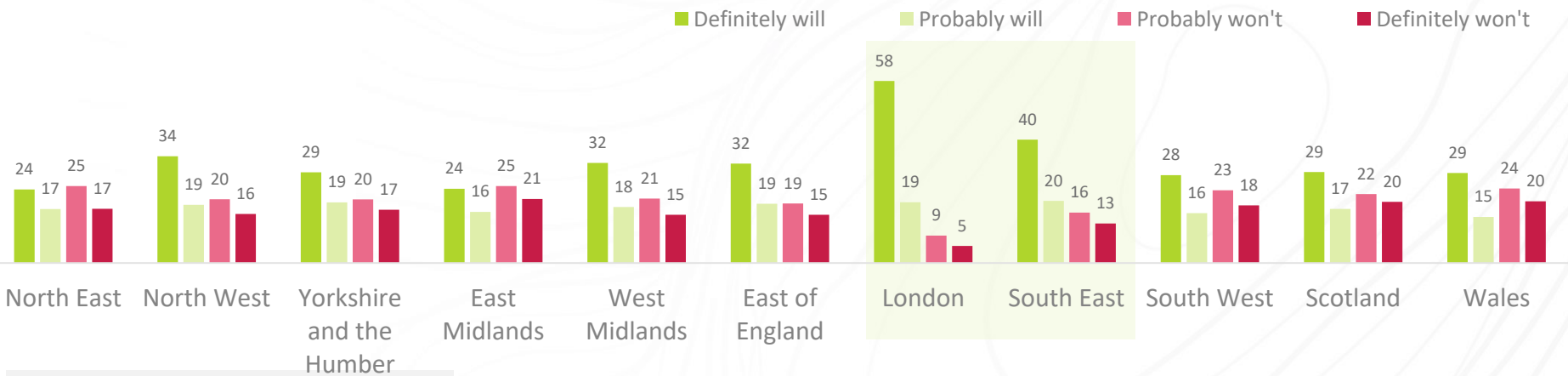# Age and region of future train rejectors and non-rejecters

**The younger demographic looks set to travel again and a considerably higher proportion in London intends to travel (58%).**

Younger people will return to travel by train whereas older people won't which could be influenced by the fact that older people use rail less anyway. Figures reflect travelling habits pre-Covid

## Likelihood to travel by train again



- Definitely will
- Probably will
- Probably won't
- Definitely won't

## Likelihood to travel by train again

- Definitely will
- Probably will
- Probably won't
- Definitely won't



| | North East | North West | Yorkshire and the Humber | East Midlands | West Midlands | East of England | London | South East | South West | Scotland | Wales |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Definitely will | 24 | 34 | 29 | 24 | 32 | 32 | 58 | 40 | 28 | 29 | 29 |
| Probably will | 17 | 19 | 19 | 16 | 18 | 19 | 19 | 20 | 16 | 17 | 15 |
| Probably won't | 25 | 20 | 20 | 25 | 21 | 19 | 9 | 16 | 23 | 22 | 24 |
| Definitely won't | 17 | 16 | 17 | 21 | 15 | 15 | 5 | 13 | 18 | 20 | 20 |

London and South East predominant regions returning to travel by train

*Fieldwork for this project was carried out in March 2021*
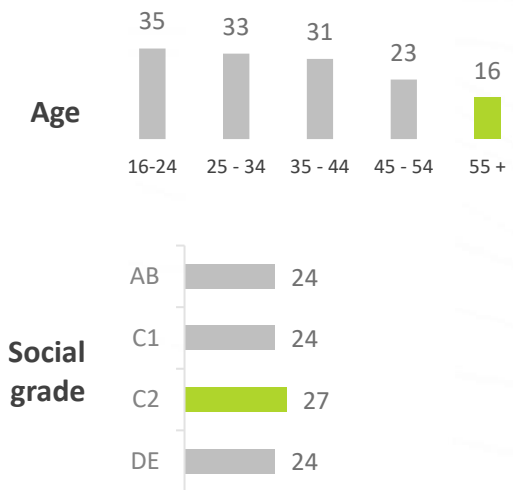
S6 How likely are you to travel by train on National Rail services, including London Overground, when Covid-19 is no longer considered a danger and things have returned to "normal"? Base: Train rejectors and non-rejecters n = 17,486

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# Attitudes to the Covid-19 pandemic – key segments

**Views about Covid-19 are not always clearly defined by age or social grade although the older are more concerned about the virus and more distrusting of others. There is a clear desire across the board for stronger reinforcement and instruction**

## Life is too short to worry about Covid-19 - it's just one of many dangerous things in the world
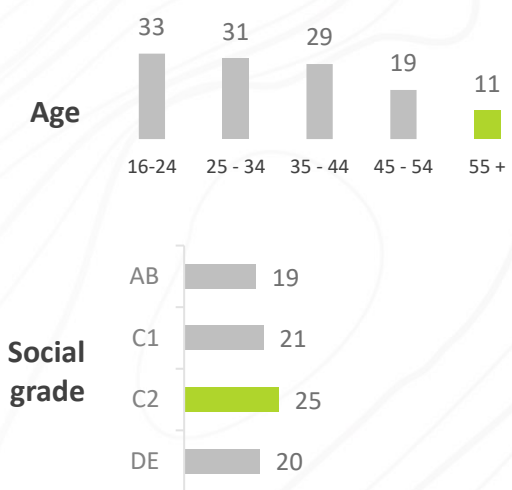
| Overall NET agree | **25%** |
|---|---|

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|---|---|---|---|---|
| 35 | 33 | 31 | 23 | 16 |

**Social grade**

| AB | 24 |
| C1 | 24 |
| C2 | 27 |
| DE | 24 |

## I am being extra cautious because I am very concerned about catching/spreading Covid-19

| Overall NET agree | **71%** |
|---|---|

**Age**

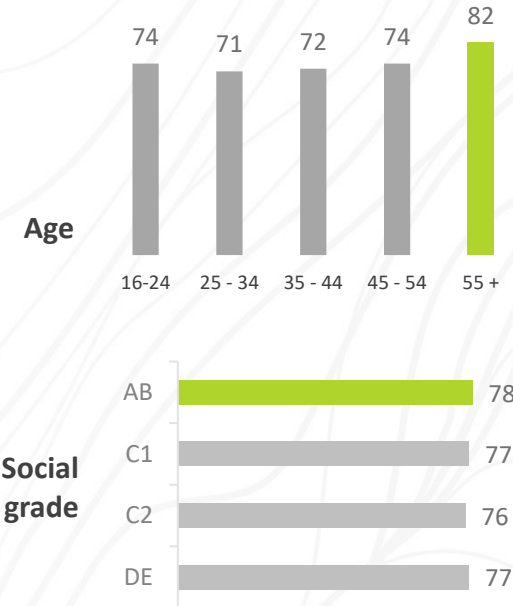| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|---|---|---|---|---|
| 65 | 67 | 69 | 72 | 75 |

**Social grade**

| AB | 70 |
| C1 | 70 |
| C2 | 73 |
| DE | 72 |

## The risks of Covid-19 have been exaggerated and we should return to normal sooner rather than later

| Overall NET agree | **21%** |
|---|---|

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|---|---|---|---|---|
| 33 | 31 | 29 | 19 | 11 |

**Social grade**

| AB | 19 |
| C1 | 21 |
| C2 | 25 |
| DE | 20 |

## People can't be trusted to behave responsibly so government restrictions are essential to prevent another outbreak of Covid-19
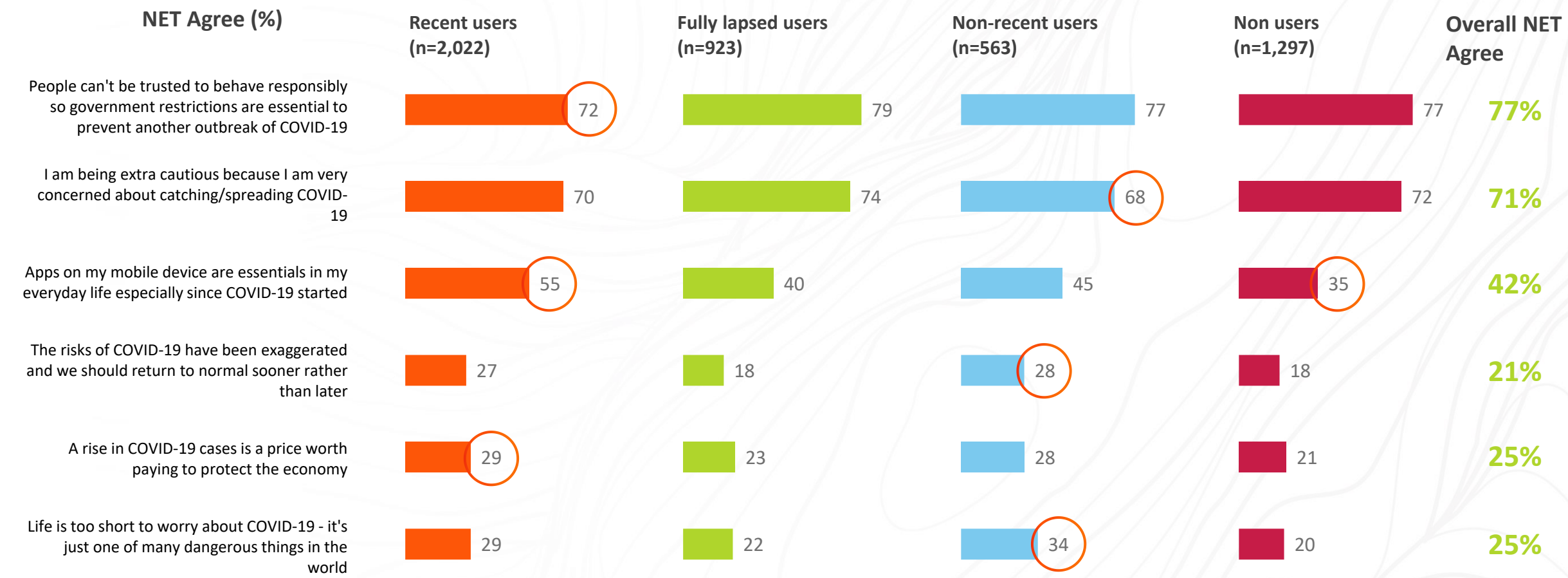
| Overall NET agree | **77%** |
|---|---|

**Age**

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|---|---|---|---|---|
| 74 | 71 | 72 | 74 | 82 |

**Social grade**

| AB | 78 |
| C1 | 77 |
| C2 | 76 |
| DE | 77 |

**All data is 'NET agree'**

D3 Below are some statements other people have made about their attitudes to life and the Covid-19 pandemic. Please indicate the extent to which you agree or disagree with each. Base: All answering  n = 4,805

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# Attitudes to life and the COVID-19 pandemic – by user group

**It is non-recent users who appear to think that life is too short to worry about Covid and are being less cautious than other groups, implying they could be most eager to return and most receptive of communications. Apps are essential for targeting recent users**
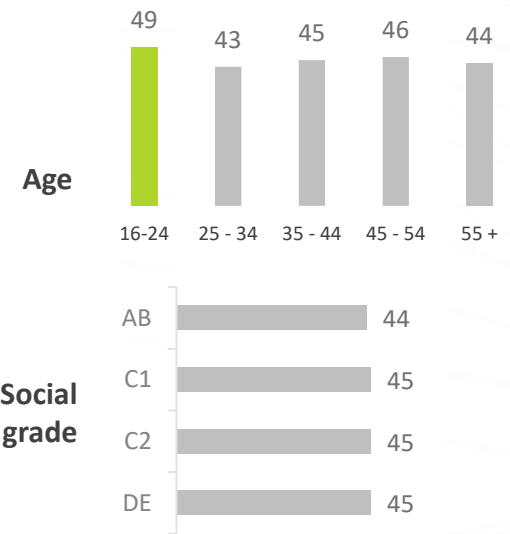
| NET Agree (%) | Recent users (n=2,022) | Fully lapsed users (n=923) | Non-recent users (n=563) | Non users (n=1,297) | Overall NET Agree |
|---|---|---|---|---|---|
| People can't be trusted to behave responsibly so government restrictions are essential to prevent another outbreak of COVID-19 | 72 | 79 | 77 | 77 | 77% |
| I am being extra cautious because I am very concerned about catching/spreading COVID-19 | 70 | 74 | 68 | 72 | 71% |
| Apps on my mobile device are essentials in my everyday life especially since COVID-19 started | 55 | 40 | 45 | 35 | 42% |
| The risks of COVID-19 have been exaggerated and we should return to normal sooner rather than later | 27 | 18 | 28 | 18 | 21% |
| A rise in COVID-19 cases is a price worth paying to protect the economy | 29 | 23 | 28 | 21 | 25% |
| Life is too short to worry about COVID-19 - it's just one of many dangerous things in the world | 29 | 22 | 34 | 20 | 25% |

D3 Below are some statements other people have made about their attitudes to life and the Covid-19 pandemic.  Please indicate the extent to which you agree or disagree with each. Base: All answering  n = 4,805
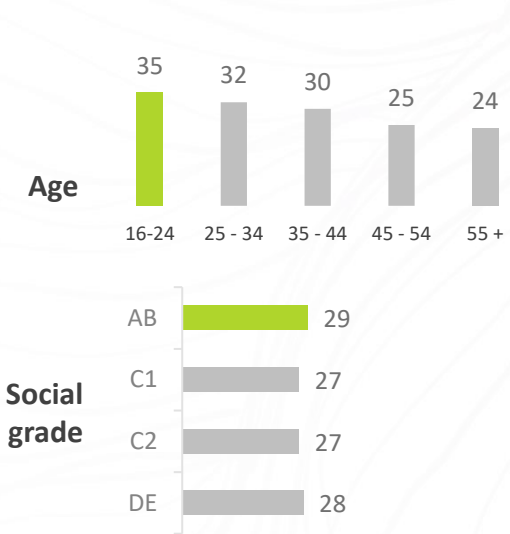
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# The impact of Covid-19 on activities and public transport

Whilst the youngest seem to feel safer on public transport and are more likely to use public transport as much as before the pandemic once restrictions are lifted, they also over index on never feeling completely comfortable again on public transport or in public spaces; it seems they need more reassurance
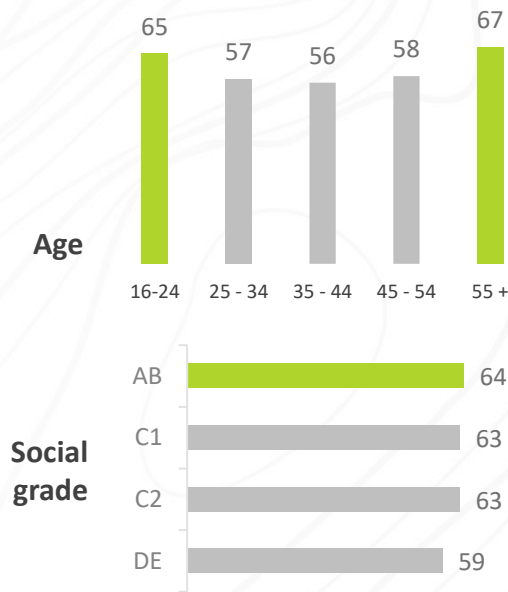
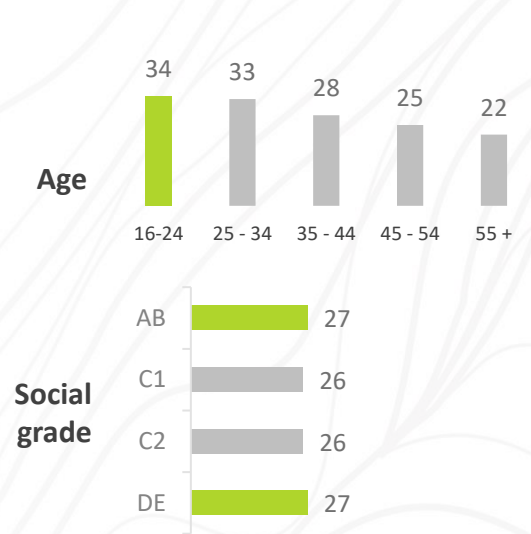## Enough is being done to ensure coronavirus safety on public transport

**Overall NET agree** **45%**

### Age

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 49 | 43 | 45 | 46 | 44 |

### Social grade

| | |
|---|---|
| AB | 44 |
| C1 | 45 |
| C2 | 45 |
| DE | 45 |

## I will never again feel completely comfortable on public transport

**Overall NET agree** **28%**

### Age

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 35 | 32 | 30 | 25 | 24 |

### Social grade

| | |
|---|---|
| AB | 29 |
| C1 | 27 |
| C2 | 27 |
| DE | 28 |

## When all restrictions are lifted, I expect to use public transport as much as I was before the pandemic

**Overall NET agree** **62%**

### Age

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 65 | 57 | 56 | 58 | 67 |

### Social grade

| | |
|---|---|
| AB | 64 |
| C1 | 63 |
| C2 | 63 |
| DE | 59 |

## I will never again feel completely comfortable in public spaces like shops

**Overall NET agree** **27%**

### Age

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|-------|---------|---------|---------|------|
| 34 | 33 | 28 | 25 | 22 |

### Social grade

| | |
|---|---|
| AB | 27 |
| C1 | 26 |
| C2 | 26 |
| DE | 27 |

*Fieldwork for this project was carried out in March 2021*

D3.2 To what extent do you agree or disagree with the following statements? Base: All answering n = 4,607

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**Understanding why people have not used the train (as much) since March 2020**

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# Summary – Non-recent, lapsed and non users

## Reasons for not travelling by train or for travelling less

### Reduced usage:

🔵 **Following government guidelines**

🔵 **Fewer leisure occasions**

🔵 **Covid related**

9.4 And why have you used trains less often since Covid-19?
Base: All travelling less often n = 6,893

### Non usage :

🚗 **Travelling by another mode of transport is more convenient**

🔵 **Covid related**

🎡 **Fewer leisure occasions**

9.5 Which are the following reasons why you don't currently travel by train?
Base: All non-users n = 2,500

## Priorities for this group

The Covid-19 safety measures that lapsed and non-users most want to see are:

**1** — Daily deep clean

**2** — Hand sanitiser available on board

**3** — Enforcing passengers to wear face coverings on the train (unless exempt)

8.3. Thinking about travelling by train while Covid-19 is still present and assuming train travel is allowed, which of the following measures would you want to see in place to ensure safer travel on board trains and at stations?
Base: All passengers who have not used the train since Covid n = 4,385

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# Covid-19 modal shift for commuting

**Bus, underground/tram/light rail and coach experience the greatest decline for commuting when comparing the use of modes before the pandemic to since the pandemic; the car records the smallest shift away although it is still quite considerable**
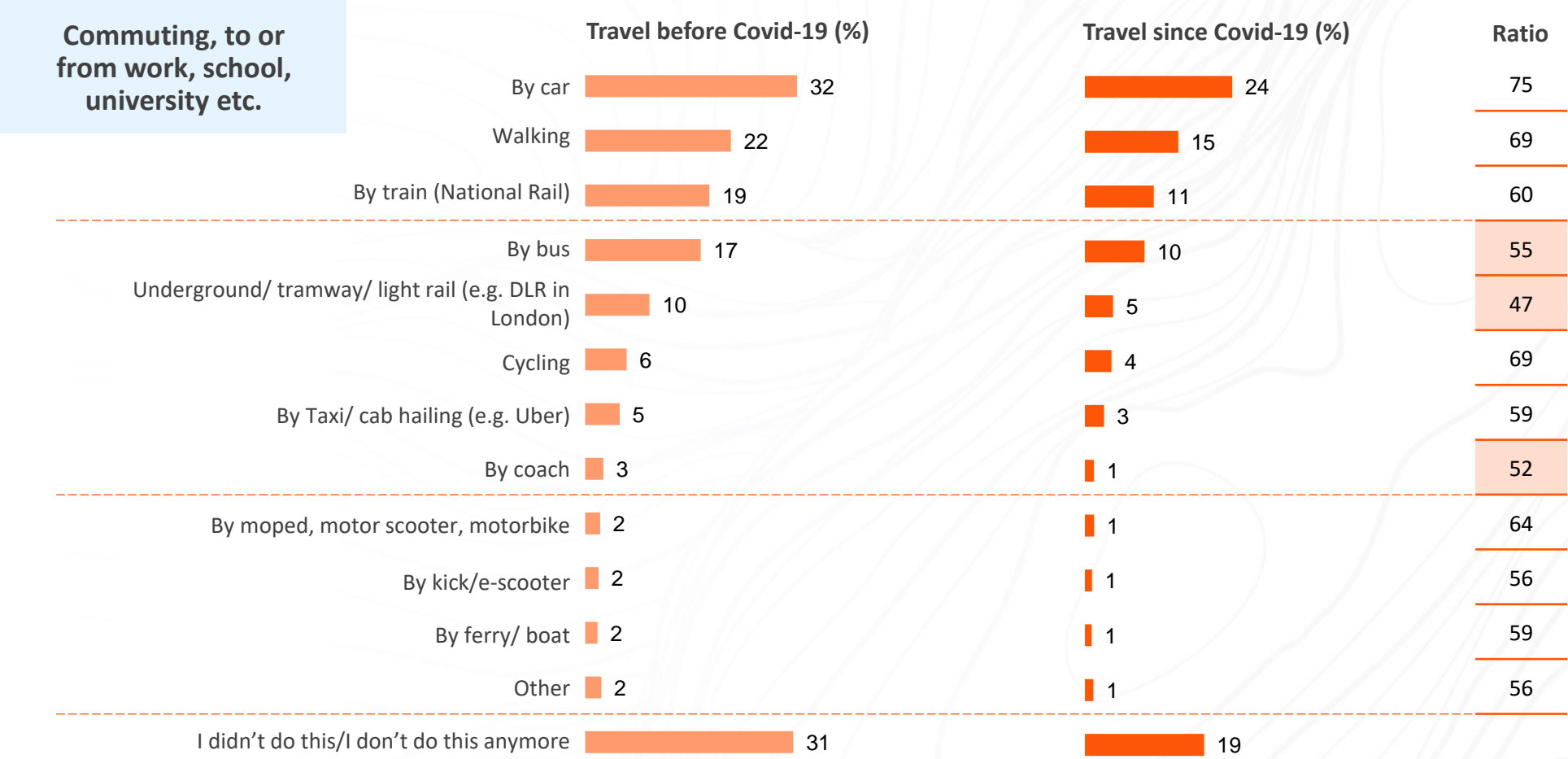
| Commuting, to or from work, school, university etc. | Travel before Covid-19 (%) | Travel since Covid-19 (%) | Ratio |
|---|---|---|---|
| By car | 32 | 24 | 75 |
| Walking | 22 | 15 | 69 |
| By train (National Rail) | 19 | 11 | 60 |
| By bus | 17 | 10 | 55 |
| Underground/ tramway/ light rail (e.g. DLR in London) | 10 | 5 | 47 |
| Cycling | 6 | 4 | 69 |
| By Taxi/ cab hailing (e.g. Uber) | 5 | 3 | 59 |
| By coach | 3 | 1 | 52 |
| By moped, motor scooter, motorbike | 2 | 1 | 64 |
| By kick/e-scooter | 2 | 1 | 56 |
| By ferry/ boat | 2 | 1 | 59 |
| Other | 2 | 1 | 56 |
| I didn't do this/I don't do this anymore | 31 | 19 | |

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# Covid-19 modal shift for leisure travel

**For leisure reasons walking and the use of a car hold relatively steady when comparing travel before Covid-19 to how people have travelled since; but not unexpected airlines are dealt the greatest blow followed by coach, ferry/boat, underground/tram/light rail and train**
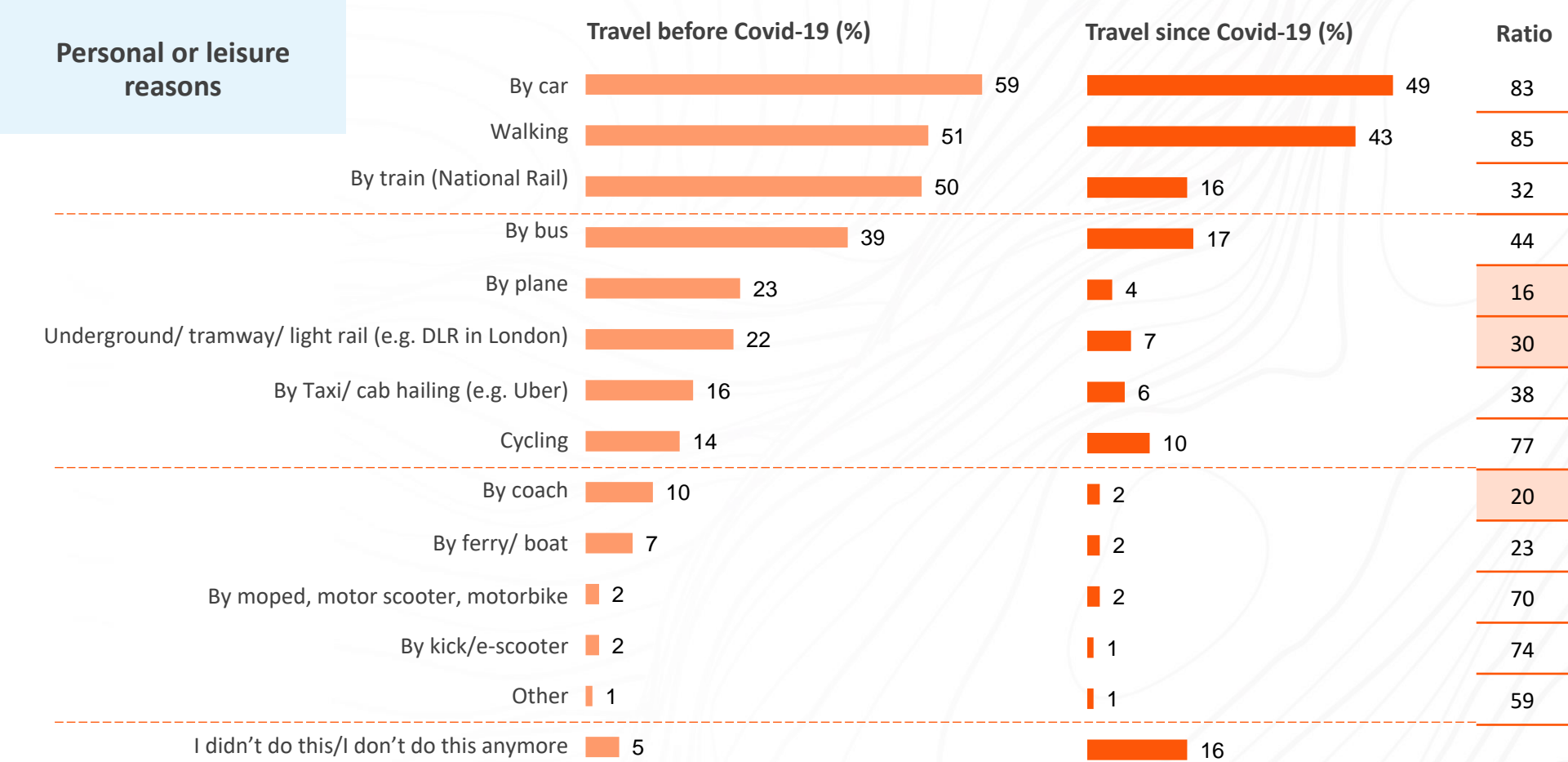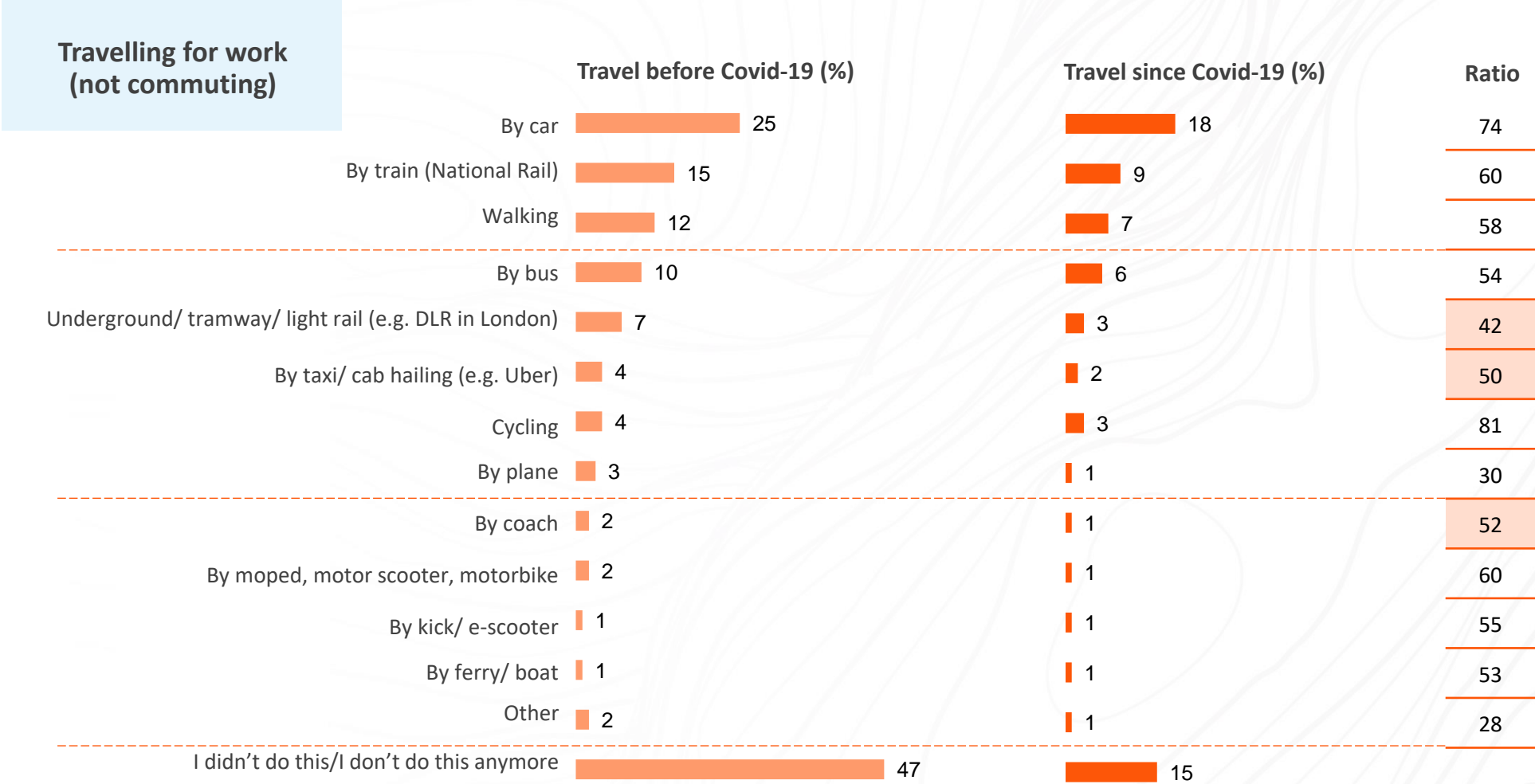
| Personal or leisure reasons | Travel before Covid-19 (%) | Travel since Covid-19 (%) | Ratio |
|---|---|---|---|
| By car | 59 | 49 | 83 |
| Walking | 51 | 43 | 85 |
| By train (National Rail) | 50 | 16 | 32 |
| By bus | 39 | 17 | 44 |
| By plane | 23 | 4 | 16 |
| Underground/ tramway/ light rail (e.g. DLR in London) | 22 | 7 | 30 |
| By Taxi/ cab hailing (e.g. Uber) | 16 | 6 | 38 |
| Cycling | 14 | 10 | 77 |
| By coach | 10 | 2 | 20 |
| By ferry/ boat | 7 | 2 | 23 |
| By moped, motor scooter, motorbike | 2 | 2 | 70 |
| By kick/e-scooter | 2 | 1 | 74 |
| Other | 1 | 1 | 59 |
| I didn't do this/I don't do this anymore | 5 | 16 | |

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# Covid-19 modal shift for business travel

**For business travel there has also been a strong shift away from planes but also underground/tram/light rail**
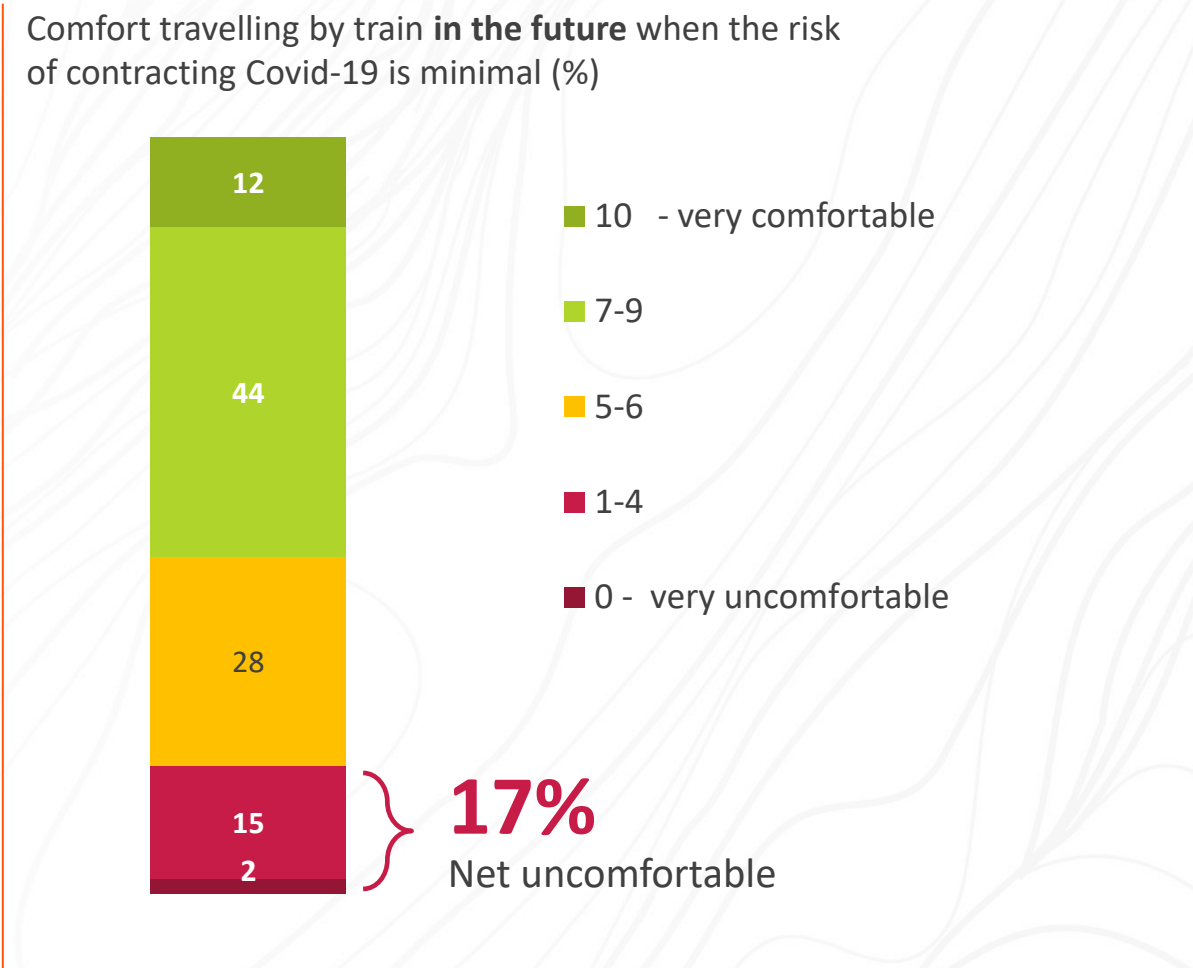
| Travelling for work (not commuting) | Travel before Covid-19 (%) | Travel since Covid-19 (%) | Ratio |
|---|---|---|---|
| By car | 25 | 18 | 74 |
| By train (National Rail) | 15 | 9 | 60 |
| Walking | 12 | 7 | 58 |
| By bus | 10 | 6 | 54 |
| Underground/ tramway/ light rail (e.g. DLR in London) | 7 | 3 | 42 |
| By taxi/ cab hailing (e.g. Uber) | 4 | 2 | 50 |
| Cycling | 4 | 3 | 81 |
| By plane | 3 | 1 | 30 |
| By coach | 2 | 1 | 52 |
| By moped, motor scooter, motorbike | 2 | 1 | 60 |
| By kick/ e-scooter | 1 | 1 | 55 |
| By ferry/ boat | 1 | 1 | 53 |
| Other | 2 | 1 | 28 |
| I didn't do this/I don't do this anymore | 47 | 15 | |

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# Comfort levels of train usage amongst lapsed and non-users

**Over half of non and lapsed users are not comfortable with travelling by train now (March 2021) while Covid is still present. The discomfort of travelling by train reduces substantially once the risk of contracting Covid-19 in the future is minimal**

Comfort travelling by train at **present** while Covid-19 is still present (%)

Comfort travelling by train **in the future** when the risk of contracting Covid-19 is minimal (%)



**Present:**
- 6 — 10 - very comfortable
- 18 — 7-9
- 24 — 5-6
- 36 — 1-4
- 16 — 0 - very uncomfortable

**52% Net uncomfortable**

**Future:**
- 12 — 10 - very comfortable
- 44 — 7-9
- 28 — 5-6
- 15 — 1-4
- 2 — 0 - very uncomfortable

**17% Net uncomfortable**

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# Profile of lapsed and non-users that feel uncomfortable using the train

**Older age groups need the greatest reassurance for using the train in the short term; in the future however, when the risk of catching the virus is minimal, the oldest group are actually the most comfortable. Females slightly more uncomfortable looking ahead**
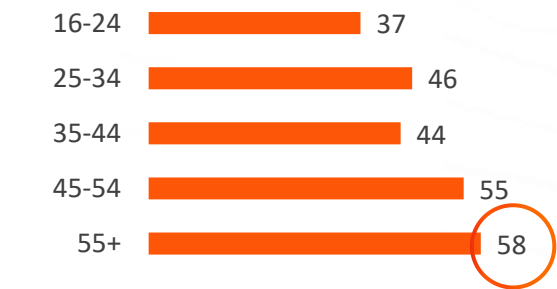
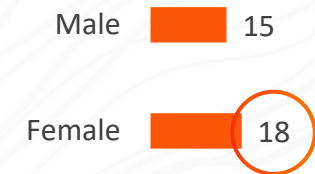Comfort travelling by train at **present** while Covid-19 is still present

| NET uncomfortable | **52%** |

**Discomfort by gender (%)**

Male 52

Female 52

**Discomfort by age (%)**

16-24 37
25-34 46
35-44 44
45-54 55
55+ 58

Comfort travelling by train **in the future** when the risk of contracting Covid-19 is minimal

| NET uncomfortable | **17%** |

**Discomfort by gender (%)**

Male 15

Female 18

**Discomfort by age (%)**

16-24 15
25-34 18
35-44 19
45-54 21
55+ 14

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# Covid-19 safety measures that lapsed and non-users want to see and think are in place

**There is a notable disconnect between Covid-19 safety measures that lapsed and non-users want to see and think are currently in place, which to some degree is driven by the fact that some of these measures are actually not in place**

| Actually in place? | | Covid-19 measures passengers want to see (%) | Covid-19 measures currently in place (%) | Difference – information gap |
|---|---|---|---|---|
| ✓ | Daily deep clean of trains | 61 | 25 | 36 |
| ✗ | Hand sanitiser available on board | 60 | 21 | 39 |
| ✓ | Enforcing passengers to wear face coverings on the train (unless exempt) | 57 | 29 | 28 |
| ✓ | Ensuring social distancing at stations | 55 | 21 | 34 |
| ✓ | Daily deep clean of stations | 54 | 19 | 35 |
| ✓ | Enforcing passengers to wear face covering at the station (unless exempt) | 53 | 23 | 30 |
| ✓ | Increasing the number of services to avoid crowding | 52 | 8 | 44 |
| ✗ | Ensuring all passengers are travelling next to an empty seat | 52 | 17 | 35 |
| ✓ | Contactless payment and ticketing possible without the need to touch surfaces | 50 | 25 | 25 |
| ✗ | Enforcing a strict reservation policy on trains to allow for social distancing | 43 | 13 | 30 |
| ✗ | Train operators giving out free masks | 38 | 9 | 29 |
| ✗ | Mandatory temperature check before being allowed to board | 34 | 6 | 28 |
| | Don't know | 15 | 49 | |
| | Other | 1 | 1 | |

8.3. Thinking about travelling by train while Covid-19 is still present and assuming train travel is allowed, which of the following measures would you want to see in place to ensure safer travel on board trains and at stations?
Base: All passengers who have not used the train since Covid n = 4,385

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# Context – What do passengers *need* to hear about?

**Qualitative work alongside the IRPS corroborates findings on what passengers want**

### Reassurance

Both that it is now <u>safe for lapsed users</u> and that the operators will <u>maintain the recent pleasant experience for recent users</u>

### Overcrowding

More future focused but another key issue. <u>How it's going to be dealt with</u> when restrictions ease needs to be made explicit to passengers

### Cleanliness

In addition to standard cleanliness messaging, respondents expressed an interest in actually seeing cleaners on trains and also cleaning rotas

### Reinforcing Covid-19 rules

One of the main concerns for passengers is those not abiding by the rules. Respondents want to see more being done about this and then hear about it in comms

### Up-to-date messaging

It is key to have up-to-date, clear information on what the regulations are and recommended actions. This needs to be online and around the stations and trains

*"There need to be more sanitiser units on trains. It would be cleaner, especially in toilets if they had sanitisers in vestibules, it would make me feel safer."*
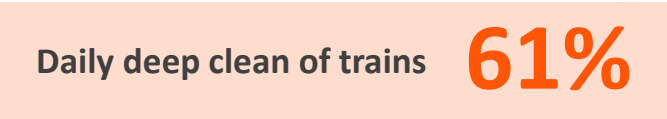
**Recent user, leisure**
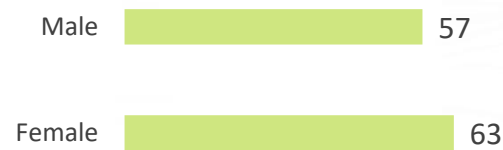
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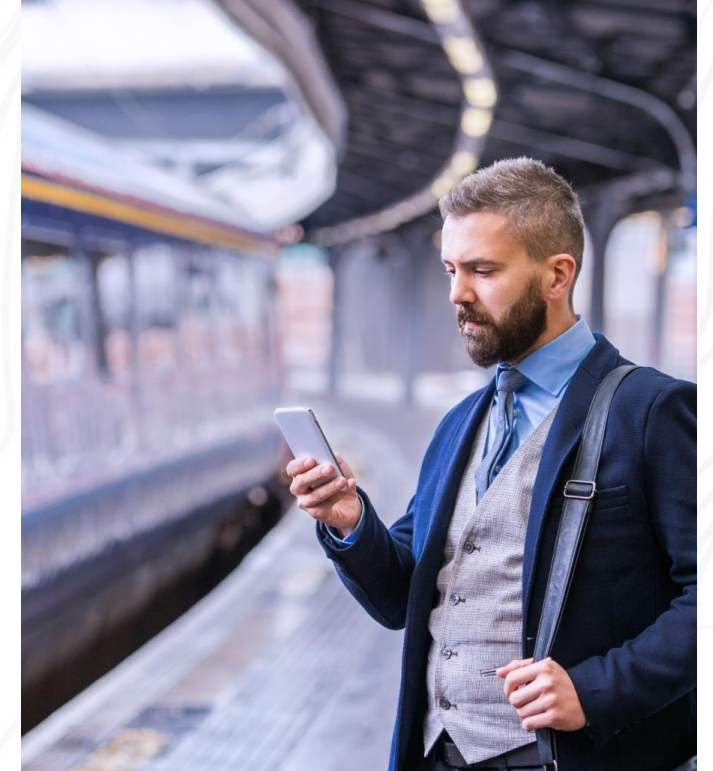
# Covid-19 safety measures deep dive – Lapsed and non-users

**Older female non-work travellers have a greater requirement for daily deep clean of trains and hand sanitisers on board … but these measures are wanted by the majority across demographics and journey types**
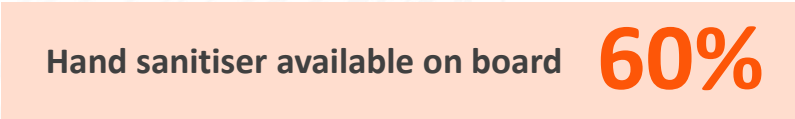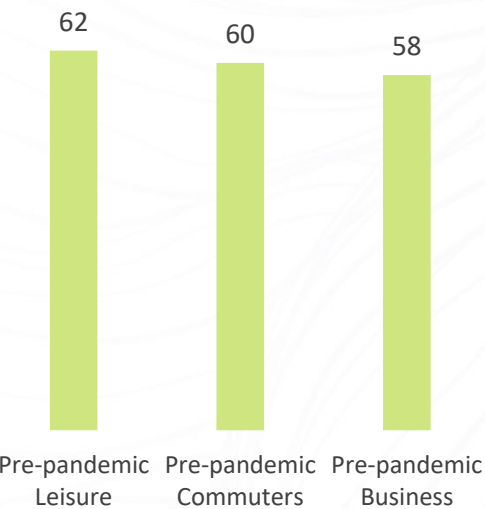
Top two Covid-19 measures passengers want to see

### Daily deep clean of trains **61%**

**Demand by gender (%)**

| | |
|---|---|
| Male | 57 |
| Female | 63 |

**Demand by journey type (%)**

| Pre-pandemic Leisure | Pre-pandemic Commuters | Pre-pandemic Business |
|---|---|---|
| 62 | 60 | 58 |

**Demand by age (%)**

| | |
|---|---|
| 16-24 | 52 |
| 25-34 | 52 |
| 35-44 | 57 |
| 45-54 | 59 |
| 55+ | 66 |

### Hand sanitiser available on board **60%**

**Demand by gender (%)**

| | |
|---|---|
| Male | 58 |
| Female | 63 |

**Demand by journey type (%)**

| Pre-pandemic Leisure | Pre-pandemic Commuters | Pre-pandemic Business |
|---|---|---|
| 62 | 60 | 58 |

**Demand by age (%)**

| | |
|---|---|
| 16-24 | 53 |
| 25-34 | 54 |
| 35-44 | 54 |
| 45-54 | 64 |
| 55+ | 65 |

*Fieldwork for this project was carried out in March 2021*

8.3. Thinking about travelling by train while Covid-19 is still present and assuming train travel is allowed, which of the following measures would you want to see in place to ensure safer travel on board trains and at stations?
Base: All passengers who have not used the train since Covid n = 4,385

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# Profiles of those who do/ do not know what is currently in place (1)

**There are no significant differences between those users who are aware of what measures are currently in place and those who are not. Those unaware however, are more likely to be non-work travellers**

Unaware what's currently in place **49%**

Aware what's currently in place **51%**

### By gender (%)

Male 47
Female 49

### By age (%)

16-24 44
25-34 53
35-44 50
45-54 51
55+ 47

### *By journey type (%)

Pre-pandemic Leisure 42
Pre-pandemic Commuters 41
Pre-pandemic Business 38

### By gender (%)

Male 53
Female 51

### By age (%)

16-24 56
25-34 47
35-44 50
45-54 49
55+ 53

### *By journey type (%)

Pre-pandemic Leisure 58
Pre-pandemic Commuters 59
Pre-pandemic Business 62

*Fully lapsed users only since non-users did not have a rail journey purpose pre-Covid.
Fully lapsed unaware of what's in place: 42%. Base: n=781, Fully lapsed aware of what's in place: 58%.
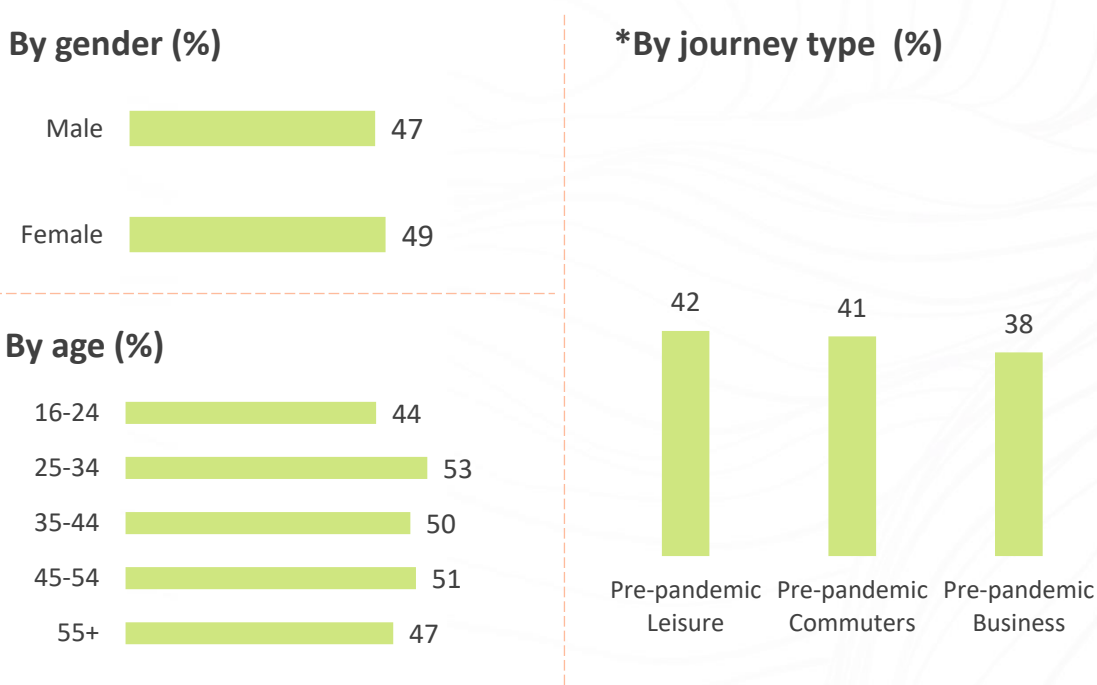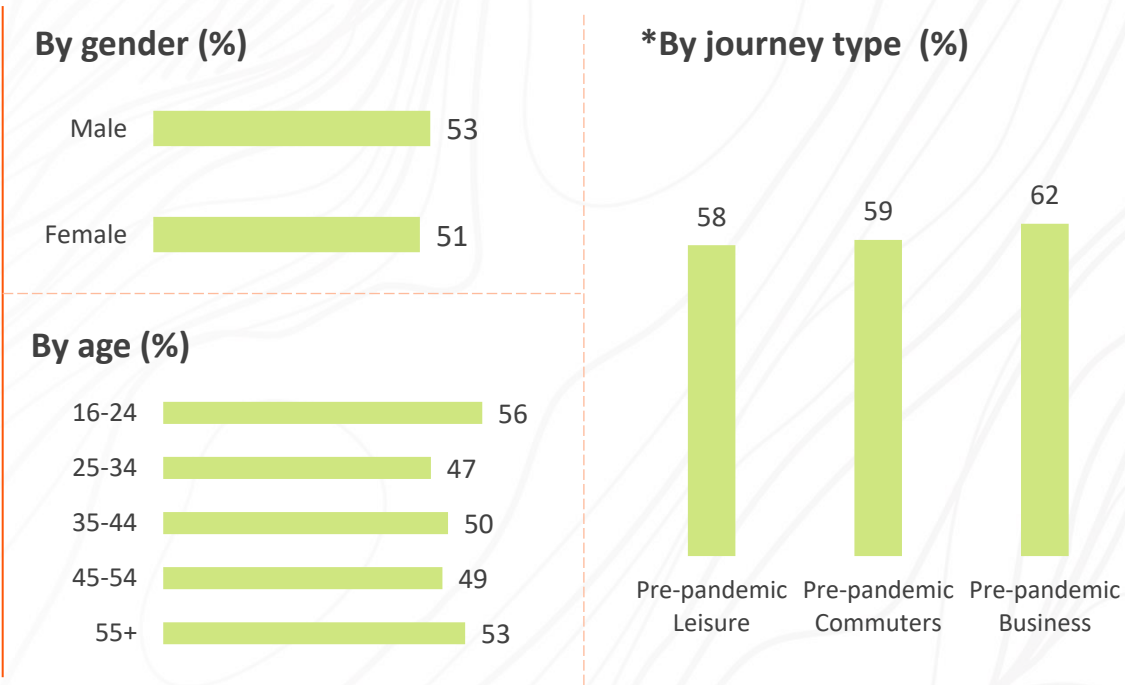Base: n=1,089*

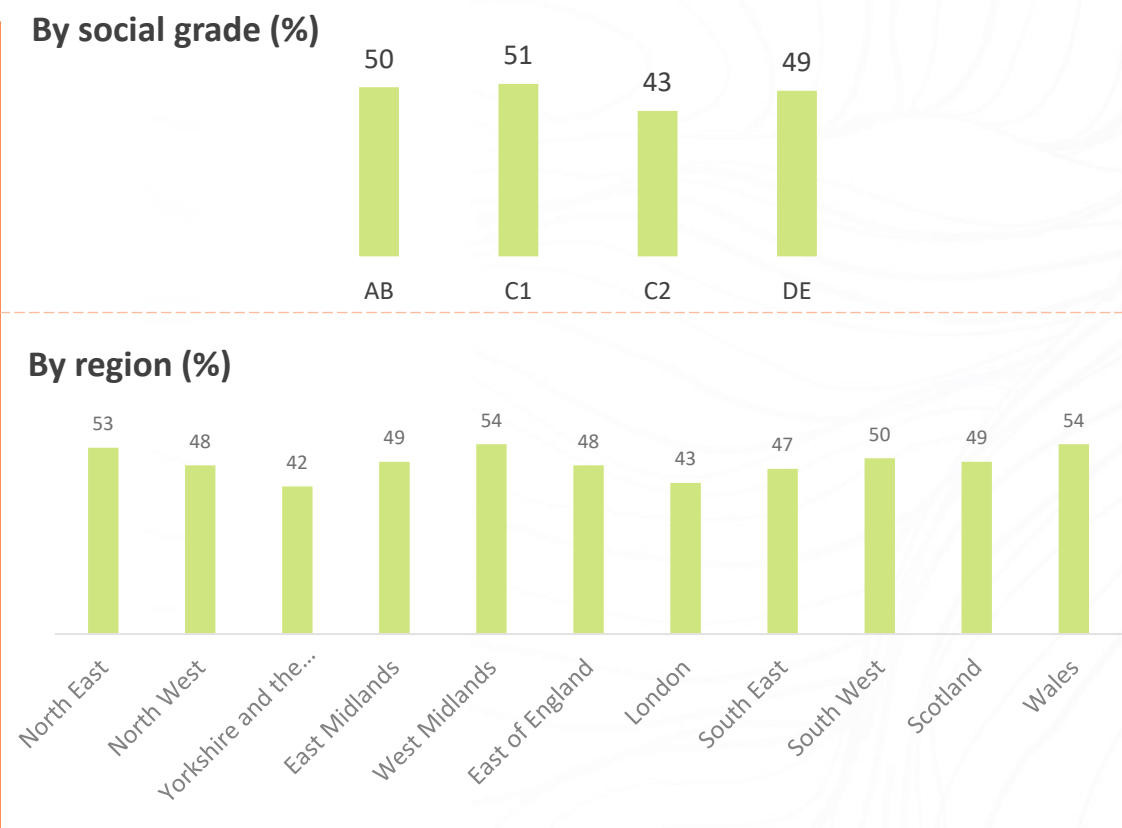Fieldwork for this project was carried out in March 2021

8.3. Thinking about travelling by train while Covid-19 is still present and assuming train travel is allowed, which of the following measures would you want to see in place to ensure safer travel on board trains and at stations?
Base: Passengers unaware of what's in place n=2,110,  Passengers aware of what's in place n=2,275.
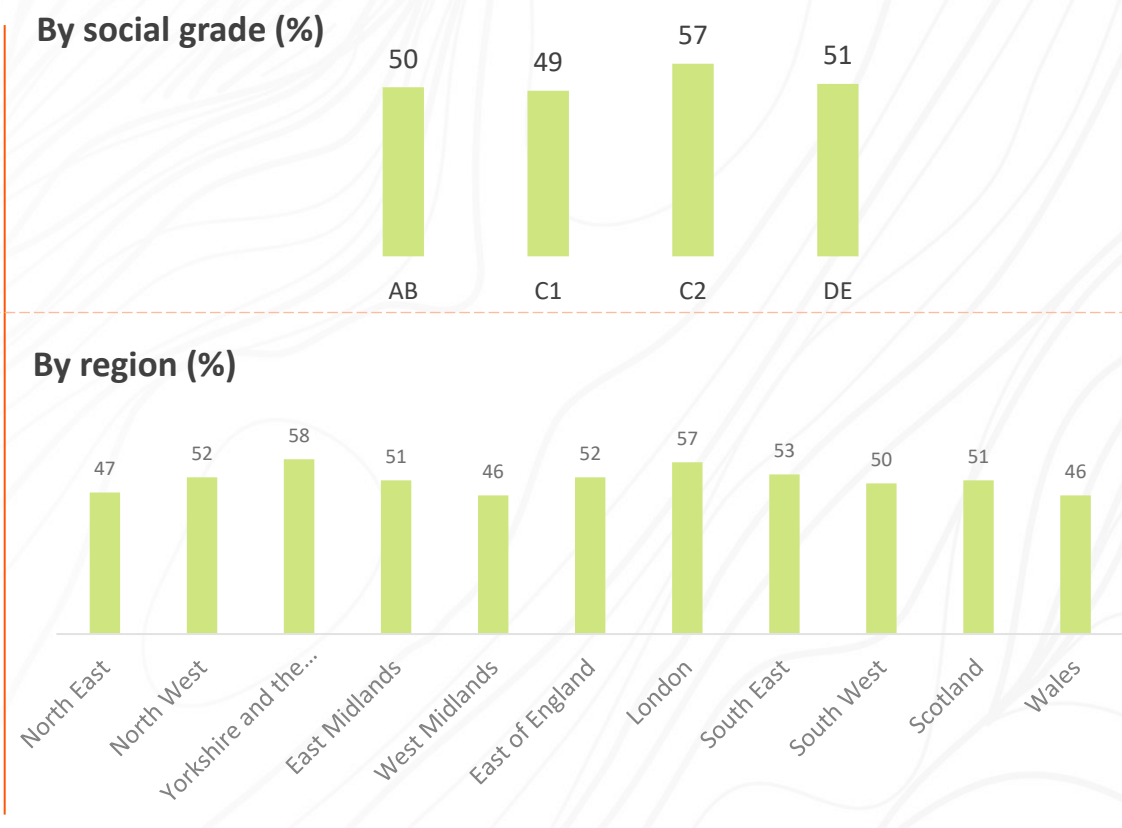
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# Profiles of those who do/ do not know what is currently in place (2)

**C2 is the social grade most likely to be aware of what is currently in place and this is the only statistically significant difference in the profiles. Those most likely to be unaware and in need of greater communications are from the North East, West Midlands and Wales**

Unaware what's currently in place **49%**

Aware what's currently in place **51%**

**By social grade (%)**

| AB | C1 | C2 | DE |
|----|----|----|----|
| 50 | 51 | 43 | 49 |

**By social grade (%)**

| AB | C1 | C2 | DE |
|----|----|----|----|
| 50 | 49 | 57 | 51 |

**By region (%)**

| North East | North West | Yorkshire and the… | East Midlands | West Midlands | East of England | London | South East | South West | Scotland | Wales |
|----|----|----|----|----|----|----|----|----|----|----|
| 53 | 48 | 42 | 49 | 54 | 48 | 43 | 47 | 50 | 49 | 54 |

**By region (%)**

| North East | North West | Yorkshire and the… | East Midlands | West Midlands | East of England | London | South East | South West | Scotland | Wales |
|----|----|----|----|----|----|----|----|----|----|----|
| 47 | 52 | 58 | 51 | 46 | 52 | 57 | 53 | 50 | 51 | 46 |

8.3. Thinking about travelling by train while Covid-19 is still present and assuming train travel is allowed, which of the following measures would you want to see in place to ensure safer travel on board trains and at stations?
Base: Passengers unaware of what's in place n=2,110, Fully lapsed aware of what's in place n=2,275.
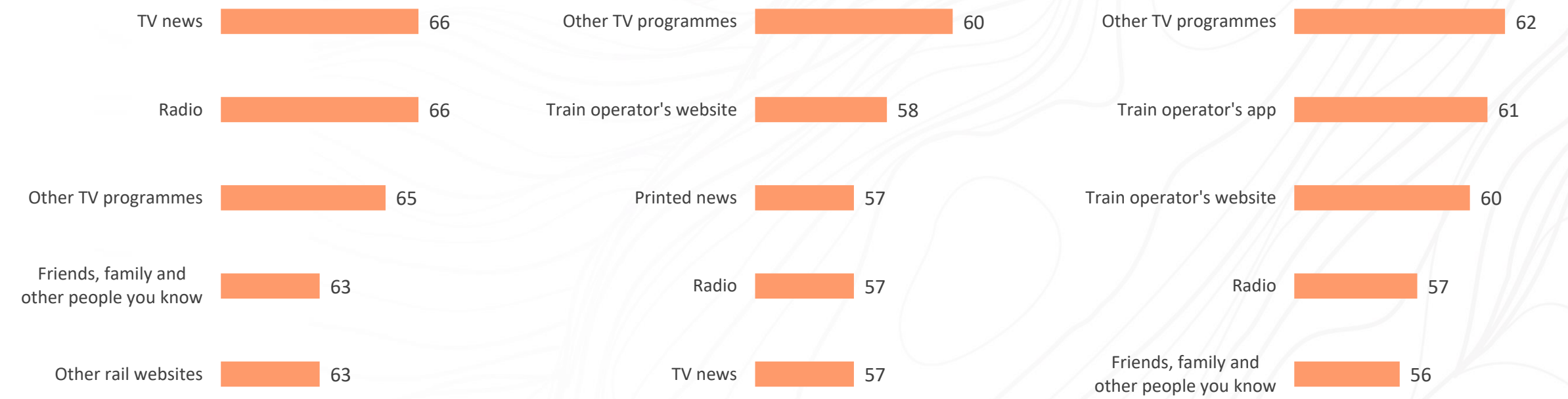
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# Covid-19 safety measures amongst lapsed and non-users – where heard they are in place

**Most information about Covid-19 measures being in place is mainly picked up on TV programmes, news, radio and from family and friends; but it's also encouraging to see that lapsed and non-users use train operators' websites to get information**

Top three Covid-19 measures lapsed and non-users think are in place

| **29%** Enforcing passengers to wear a face coverings on the train (unless exempt) | **25%** Daily deep clean of trains | **25%** Contactless payment and ticketing possible without the need to touch surfaces |
|---|---|---|
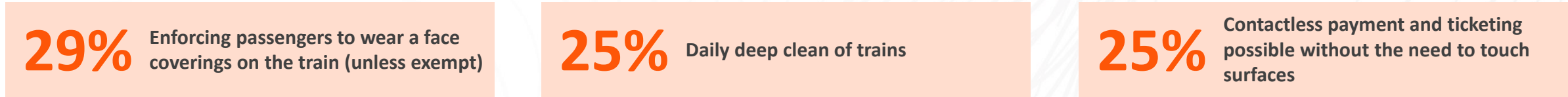
Where they had seen or heard that this was the case (%)

| | | |
|---|---|---|
| TV news — 66 | Other TV programmes — 60 | Other TV programmes — 62 |
| Radio — 66 | Train operator's website — 58 | Train operator's app — 61 |
| Other TV programmes — 65 | Printed news — 57 | Train operator's website — 60 |
| Friends, family and other people you know — 63 | Radio — 57 | Radio — 57 |
| Other rail websites — 63 | TV news — 57 | Friends, family and other people you know — 56 |

*Fieldwork for this project was carried out in March 2021*

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# Qual context – Importance of reinforcing Covid-19 rules

**There needs to be clearer guidance on the rules and expectations around social distancing and wearing face coverings**

## Staff expected to lead by example and enforce the regulations

- Passengers are looking for staff to set an example for following Covid regulations. Their behaviour is key – if they don't abide by the rules, how can one expect (other) passengers to do so?

- More staff remains a common point as the public finds it reassuring to see their presence. Disabled passengers in particular think there are not enough staff to help them. The emphasis though needs to be on staff behaviour.

- A recurring criticism is that it's not possible to recognise passengers who are exempt from wearing face coverings.

- The sunflower lanyard, currently used for identifying those exempt from wearing a face covering (among others), is hardly known by anyone. It needs much greater prominence. Since the sunflower lanyard also helps identify passengers who have a non-visible disability, disabled respondents in particular endorse this.

- A key point is, however, that people do not have to identify themselves if they are exempt from wearing face coverings which may need to become part of TOC communication

**Key takeaway:**

It needs to be clear to both staff and passengers exactly what the regulations are as restrictions ease. The rail sector needs to decide whether to enforce or not and how. The practice by shops of 'no mask, no entrance' is praised and passengers would like train operators to take a similar stand.
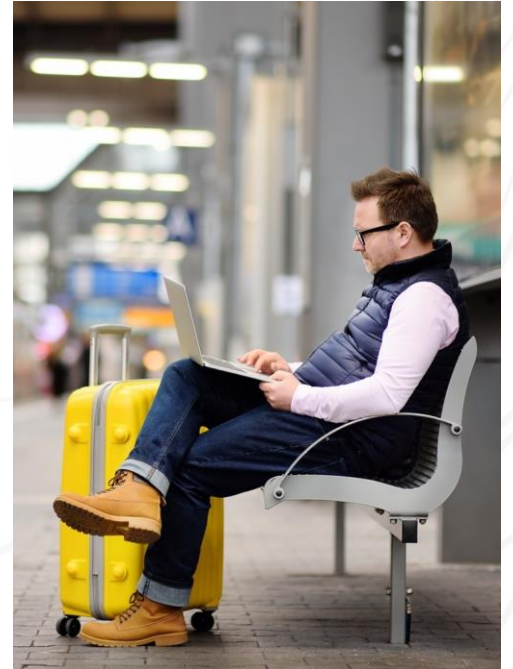
*"When booking a ticket online, passengers should tick a box that they commit to adhering to Covid rules when using trains; this will not enforce anything but they will be aware that they made a psychological commitment."*

**Recent user, leisure**

*"Staff don't always make an effort to enforce rules, sometimes they are just on the phone."*

**Recent user, leisure**

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# What lapsed users are most looking forward to when resuming train usage

**Lapsed customers are looking forward to having freedom to travel however travelling safely will remain a top priority**

**Lapsed users (%)**

Having the freedom of going places
**65%**

Travelling safely (Covid and non Covid related)
**59%**

Being able to travel in comfort
**53%**

Getting to your destination quickly
**46%**

Having time to yourself to relax
**36%**

Being able to do things while travelling (i.e. read a book, check emails)
**35%**

Enjoying a snack/ quick bite on board the train
**17%**

Spending time at the train station (i.e. shopping, having a coffee)
**15%**

None of the above/ I am not looking forward to being back on trains
**3%**

Other
**1%**

8.5 And which of these are you most looking forward to when you are next going to take the train?
Base: All passengers who have fully lapsed n = 1,885

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# Lapsed users resuming train usage by Covid attitudes

## Freedom of movement is very pronounced for those more Covid cautious; they feel more strongly about safety than other segments

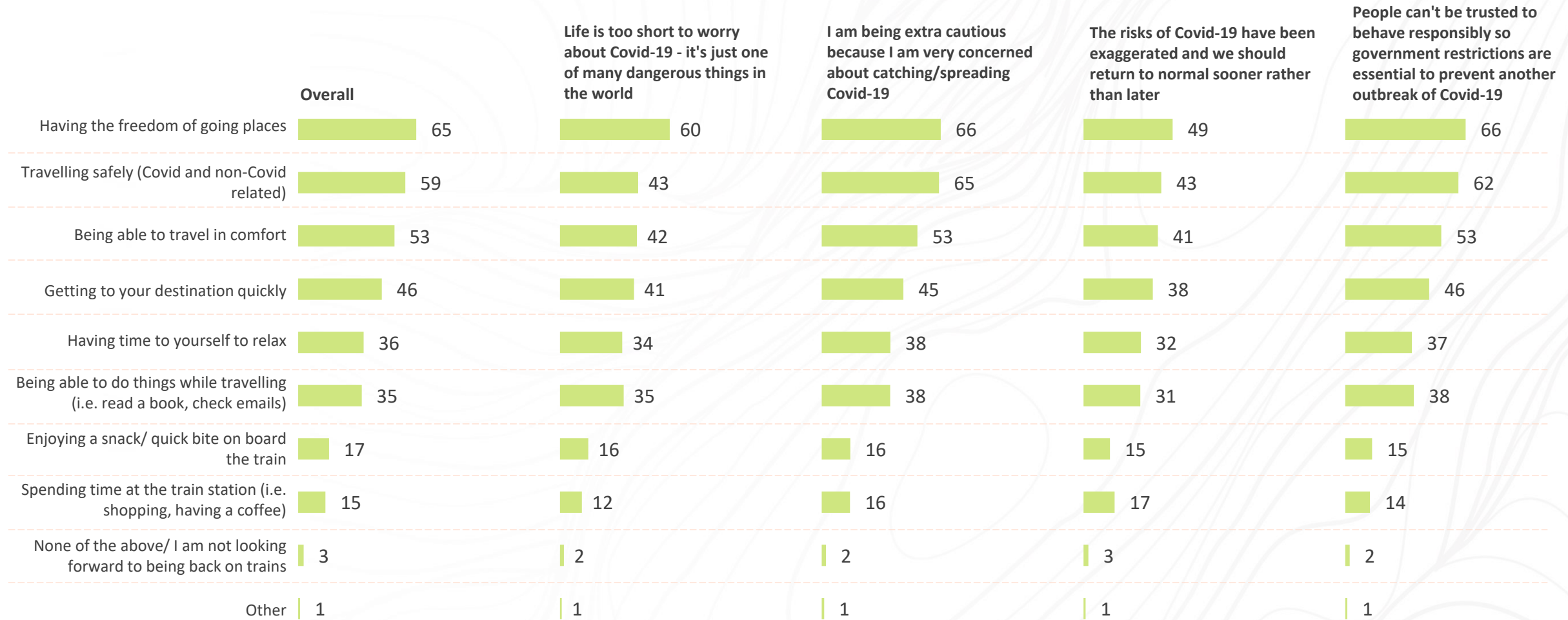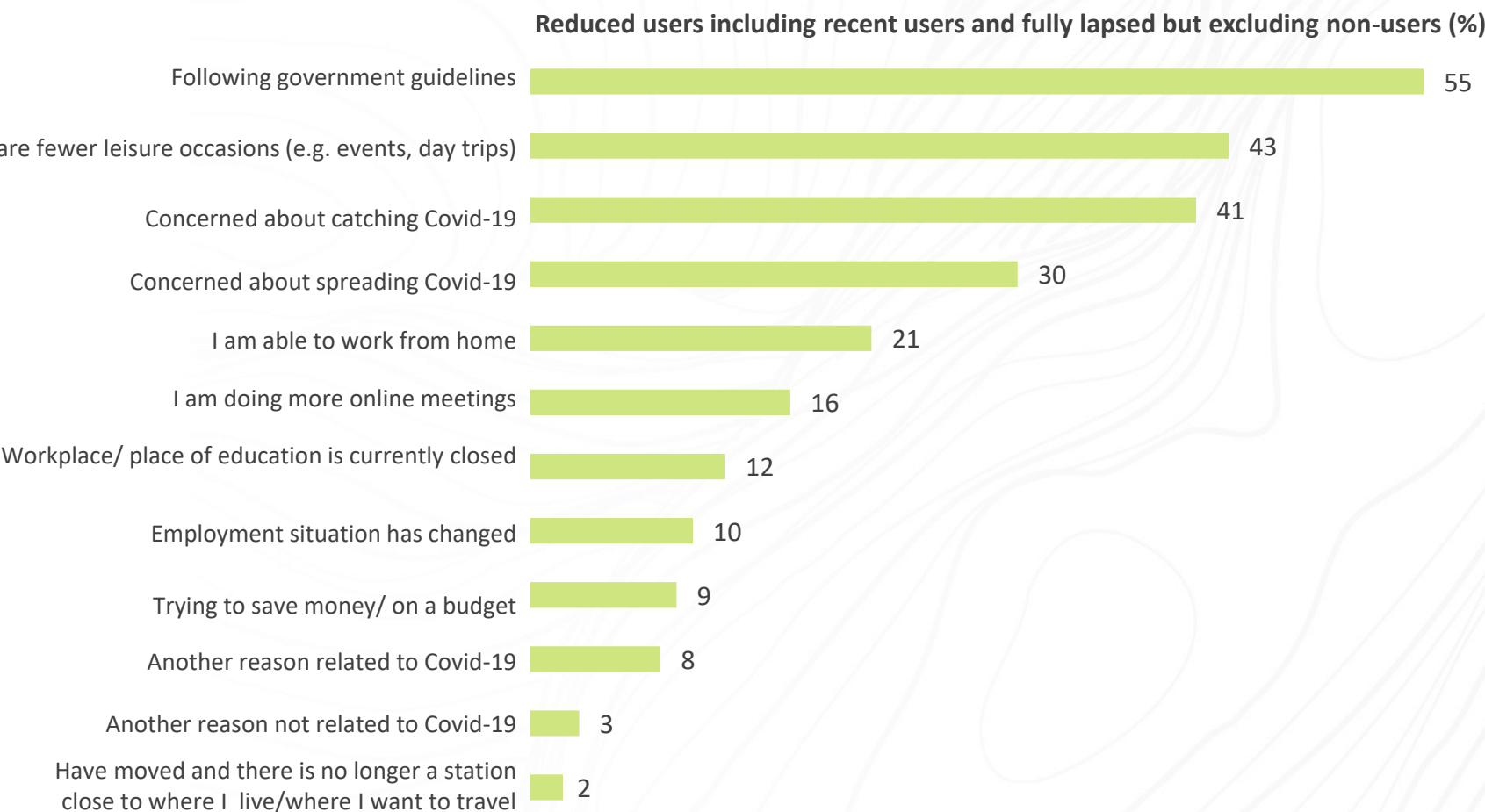| | Overall | Life is too short to worry about Covid-19 - it's just one of many dangerous things in the world | I am being extra cautious because I am very concerned about catching/spreading Covid-19 | The risks of Covid-19 have been exaggerated and we should return to normal sooner rather than later | People can't be trusted to behave responsibly so government restrictions are essential to prevent another outbreak of Covid-19 |
|---|---|---|---|---|---|
| Having the freedom of going places | 65 | 60 | 66 | 49 | 66 |
| Travelling safely (Covid and non-Covid related) | 59 | 43 | 65 | 43 | 62 |
| Being able to travel in comfort | 53 | 42 | 53 | 41 | 53 |
| Getting to your destination quickly | 46 | 41 | 45 | 38 | 46 |
| Having time to yourself to relax | 36 | 34 | 38 | 32 | 37 |
| Being able to do things while travelling (i.e. read a book, check emails) | 35 | 35 | 38 | 31 | 38 |
| Enjoying a snack/ quick bite on board the train | 17 | 16 | 16 | 15 | 15 |
| Spending time at the train station (i.e. shopping, having a coffee) | 15 | 12 | 16 | 17 | 14 |
| None of the above/ I am not looking forward to being back on trains | 3 | 2 | 2 | 3 | 2 |
| Other | 1 | 1 | 1 | 1 | 1 |

*Fieldwork for this project was carried out in March 2021*

8.5 And which of these are you most looking forward to when you are next going to take the train?
Base: All passengers who have fully lapsed n = 1,885

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# Reasons for using the train less often since Covid-19

**Abiding by government guidelines is the key reason for those who have been travelling less often since the pandemic first took hold**
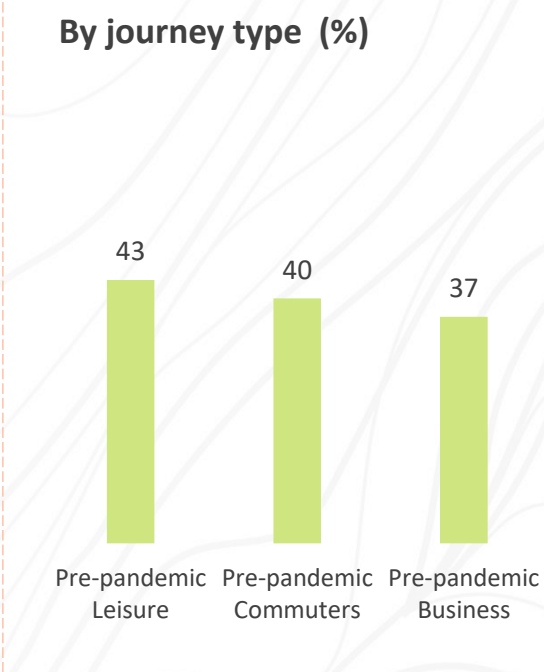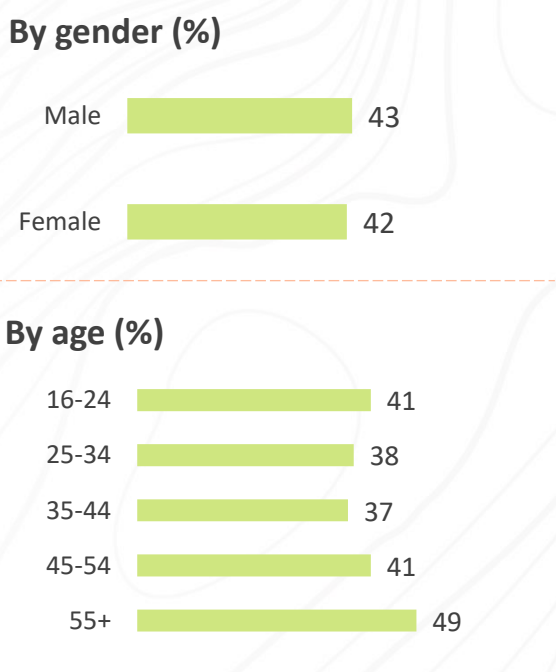
Reduced users including recent users and fully lapsed but excluding non-users (%)

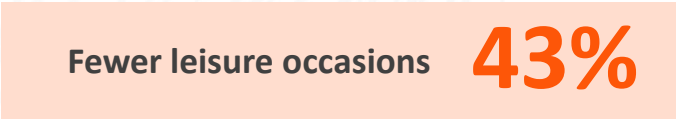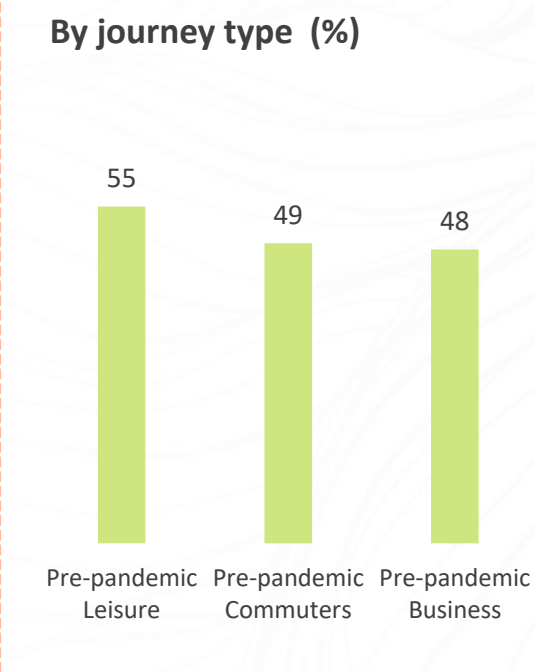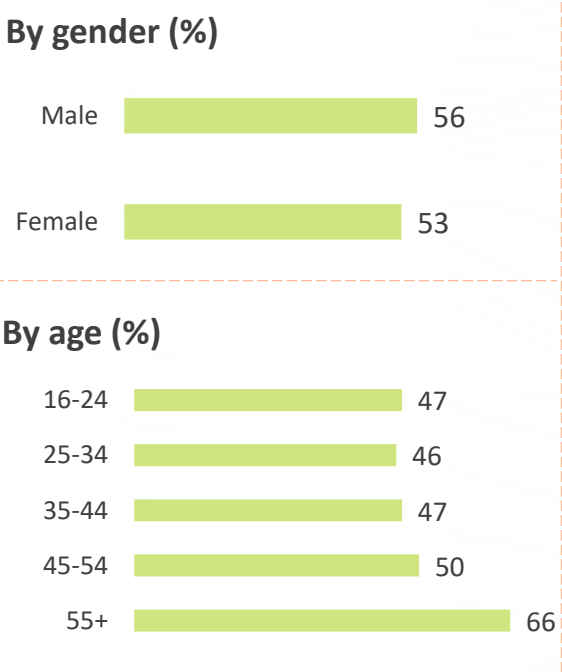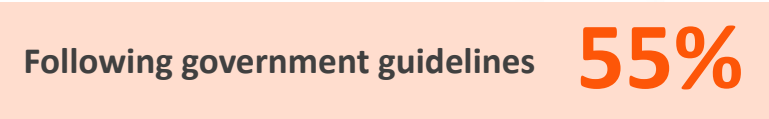| Reason | % |
|---|---|
| Following government guidelines | 55 |
| Because there are fewer leisure occasions (e.g. events, day trips) | 43 |
| Concerned about catching Covid-19 | 41 |
| Concerned about spreading Covid-19 | 30 |
| I am able to work from home | 21 |
| I am doing more online meetings | 16 |
| Workplace/ place of education is currently closed | 12 |
| Employment situation has changed | 10 |
| Trying to save money/ on a budget | 9 |
| Another reason related to Covid-19 | 8 |
| Another reason not related to Covid-19 | 3 |
| Have moved and there is no longer a station close to where I live/where I want to travel | 2 |

*Fieldwork for this project was carried out in March 2021*

9.4 And why have you used trains less often since Covid-19?
Base: All travelling less often n = 6,893

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# Reasons for using the train less often since Covid-19 – deep dive of top reasons /1

**The older are considerably more likely to have reduced their train travel (or stopped) because they follow government advice than the younger; this is mirrored by those travelling less often because of fewer leisure occasions**

**Top two reasons for travelling less often**

Following government guidelines **55%**

**By gender (%)**

| | |
|---|---|
| Male | 56 |
| Female | 53 |

**By journey type (%)**

| | |
|---|---|
| Pre-pandemic Leisure | 55 |
| Pre-pandemic Commuters | 49 |
| Pre-pandemic Business | 48 |

**By age (%)**

| | |
|---|---|
| 16-24 | 47 |
| 25-34 | 46 |
| 35-44 | 47 |
| 45-54 | 50 |
| 55+ | 66 |

Fewer leisure occasions **43%**

**By gender (%)**

| | |
|---|---|
| Male | 43 |
| Female | 42 |

**By journey type (%)**

| | |
|---|---|
| Pre-pandemic Leisure | 43 |
| Pre-pandemic Commuters | 40 |
| Pre-pandemic Business | 37 |

**By age (%)**

| | |
|---|---|
| 16-24 | 41 |
| 25-34 | 38 |
| 35-44 | 37 |
| 45-54 | 41 |
| 55+ | 49 |

*Fieldwork for this project was carried out in March 2021*

9.4 And why have you used trains less often since Covid-19?
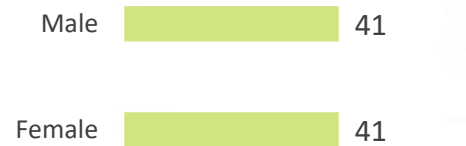Base: All travelling less often n = 6,893

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# Reasons for using the train less often since Covid-19 – deep dive of top reasons /2

**The older are also more concerned about catching Covid-19 but when it comes to travelling less because of concern about spreading the virus, this is fairly even across segments**
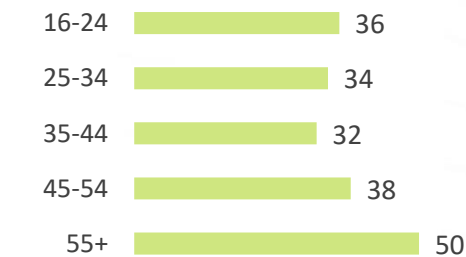
Next top two reasons for travelling less often

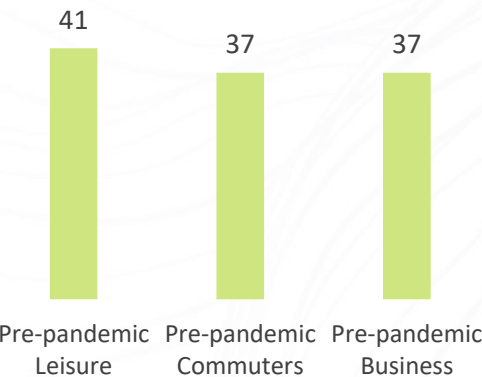| Concerned about catching Covid-19 | **41%** |
| --- | --- |

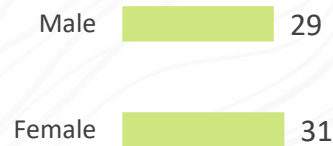### By gender (%)

Male — 41

Female — 41

### By age (%)

16-24 — 36
25-34 — 34
35-44 — 32
45-54 — 38
55+ — 50

### By journey type (%)

Pre-pandemic Leisure — 41
Pre-pandemic Commuters — 37
Pre-pandemic Business — 37

| Concerned about spreading Covid-19 | **30%** |
| --- | --- |

### By gender (%)
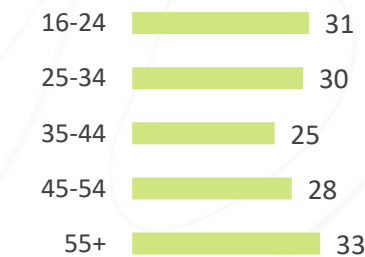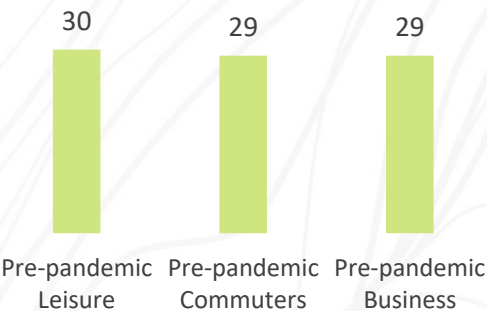
Male — 29

Female — 31

### By age (%)

16-24 — 31
25-34 — 30
35-44 — 25
45-54 — 28
55+ — 33

### By journey type (%)

Pre-pandemic Leisure — 30
Pre-pandemic Commuters — 29
Pre-pandemic Business — 29

*Fieldwork for this project was carried out in March 2021*

9.4 And why have you used trains less often since Covid-19?
Base: All travelling less often n = 6,893

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# Reasons for no travel – non-users

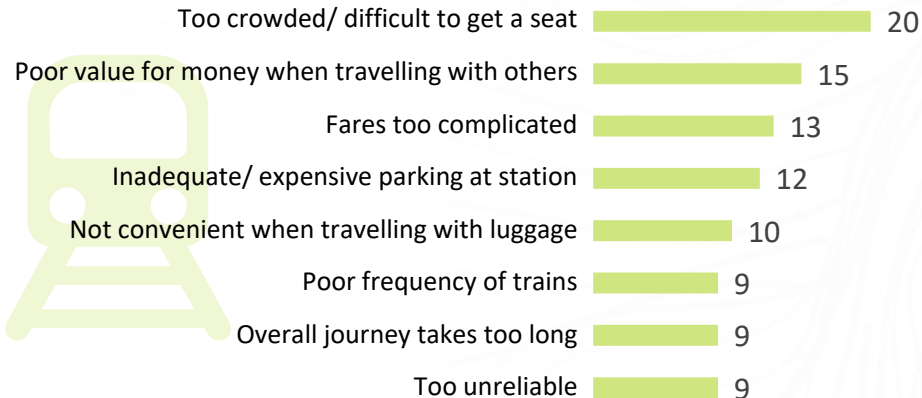**Whilst combined Covid specific reasons dominate for not using the train amongst non-users, individually the main reason is that another mode is more convenient; for this user segment the sector needs to promote the convenience of train travel**
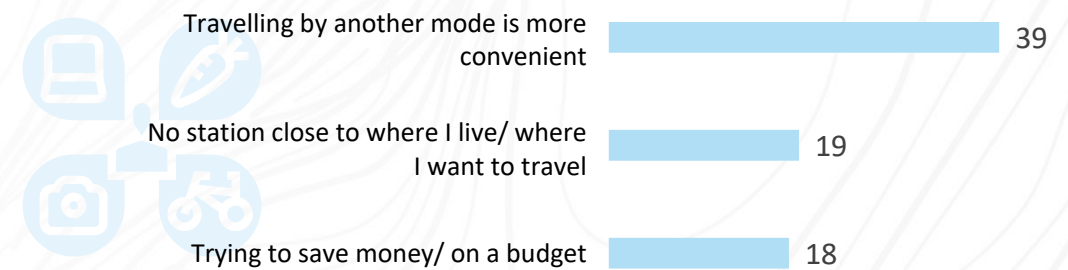
## Covid-19 specific  **75%**

Figures in charts in %

| | |
|---|---|
| Following government guidelines | 36 |
| Concerned about catching Covid-19 | 34 |
| There are fewer leisure occasions | 32 |
| Concerned about spreading Covid-19 | 21 |
| Another reason related to Covid-19 | 2 |

## Lifestyle specific  **66%**

| | |
|---|---|
| Travelling by another mode is more convenient | 39 |
| No station close to where I live/ where I want to travel | 19 |
| Trying to save money/ on a budget | 18 |

## Train specific  **54%**

| | |
|---|---|
| Too crowded/ difficult to get a seat | 20 |
| Poor value for money when travelling with others | 15 |
| Fares too complicated | 13 |
| Inadequate/ expensive parking at station | 12 |
| Not convenient when travelling with luggage | 10 |
| Poor frequency of trains | 9 |
| Overall journey takes too long | 9 |
| Too unreliable | 9 |

## Work/ education specific  **41%**
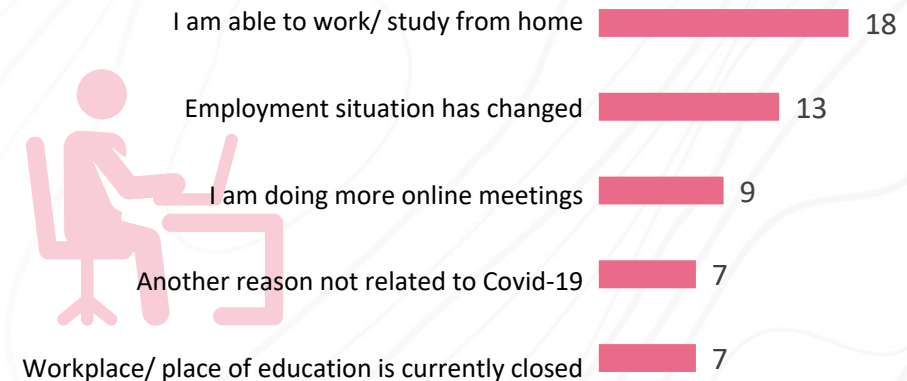
| | |
|---|---|
| I am able to work/ study from home | 18 |
| Employment situation has changed | 13 |
| I am doing more online meetings | 9 |
| Another reason not related to Covid-19 | 7 |
| Workplace/ place of education is currently closed | 7 |

*Fieldwork for this project was carried out in March 2021*

9.5 Which are the following reasons why you don't currently travel by train?
Base: All non-users n = 2,500

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# Reasons for not using the train – deep dive of top reasons /1

**The convenience of another mode is more likely to stop older males from using the train; the trend is similar for abiding by government advice**

**Top two reasons for not using the train**

### Travelling by another mode is more convenient · **39%**

**By gender (%)**

| | |
|---|---|
| Male | 42 |
| Female | 37 |

**By age (%)**

| | |
|---|---|
| 16-24 | 31 |
| 25-34 | 34 |
| 35-44 | 37 |
| 45-54 | 34 |
| 55+ | 44 |

**By journey type (%)**

| Pre-pandemic Leisure | Pre-pandemic Commuters | Pre-pandemic Business |
|---|---|---|
| 40 | 40 | 40 |
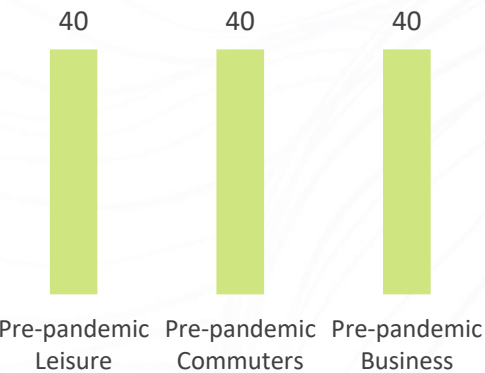
### Following government guidelines · **36%**

**By Gender (%)**
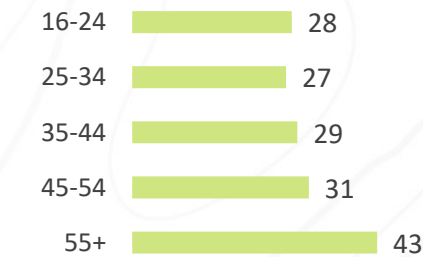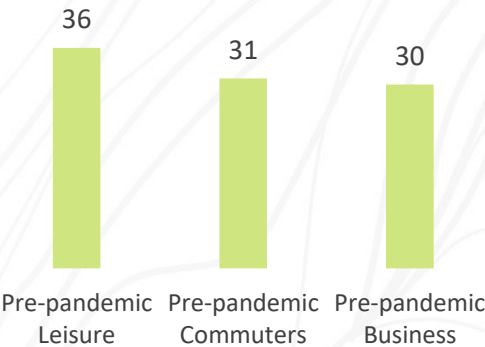
| | |
|---|---|
| Male | 39 |
| Female | 33 |

**By age (%)**

| | |
|---|---|
| 16-24 | 28 |
| 25-34 | 27 |
| 35-44 | 29 |
| 45-54 | 31 |
| 55+ | 43 |

**By journey type (%)**

| Pre-pandemic Leisure | Pre-pandemic Commuters | Pre-pandemic Business |
|---|---|---|
| 36 | 31 | 30 |

*Fieldwork for this project was carried out in March 2021*

9.5 Which are the following reasons why you don't currently travel by train?
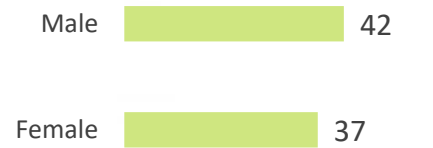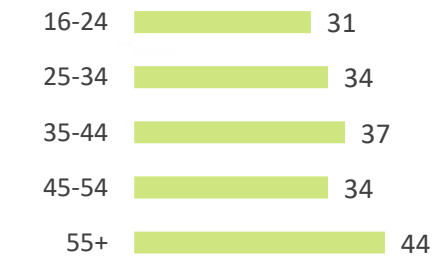Base: All non-users n = 2,500

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# Reasons for not using the train – deep dive of top reasons /2

**Female non-users are more likely to state concerns about catching Covid and that there are fewer leisure occasions as reasons for not using the train compared to their male counterparts**

**Next top two reasons for travelling less often**

| Concerned about catching Covid-19 | **34%** |

### By gender (%)

- Male — 33
- Female — 35

### By journey type (%)

- Pre-pandemic Leisure — 35
- Pre-pandemic Commuters — 32
- Pre-pandemic Business — 32

### By age (%)

- 16-24 — 38
- 25-34 — 31
- 35-44 — 26
- 45-54 — 33
- 55+ — 36

| There are fewer leisure occasions (e.g. events, day trips...) | **32%** |

### By Gender (%)

- Male — 28
- Female — 35

### By journey type (%)

- Pre-pandemic Leisure — 33
- Pre-pandemic Commuters — 31
- Pre-pandemic Business — 30

### By age (%)

- 16-24 — 36
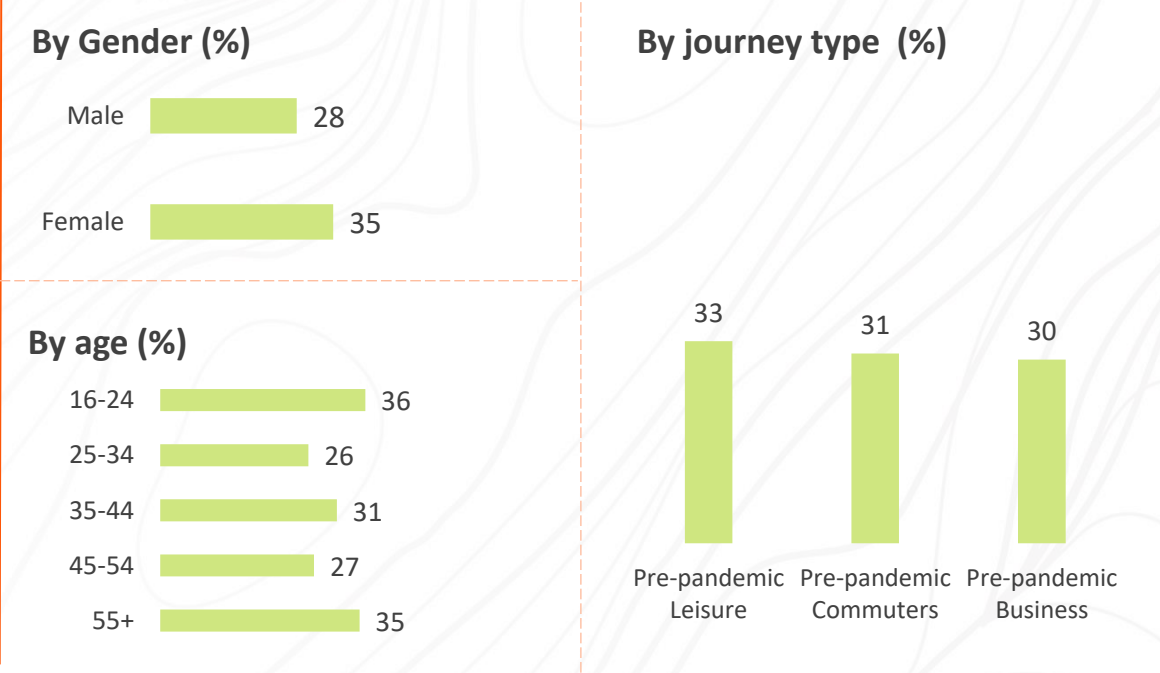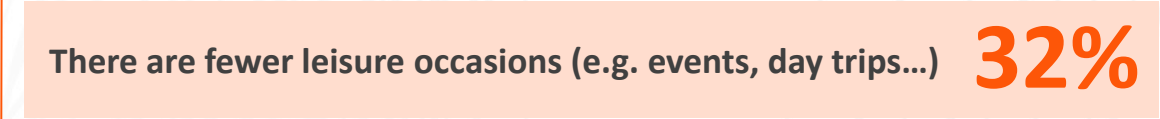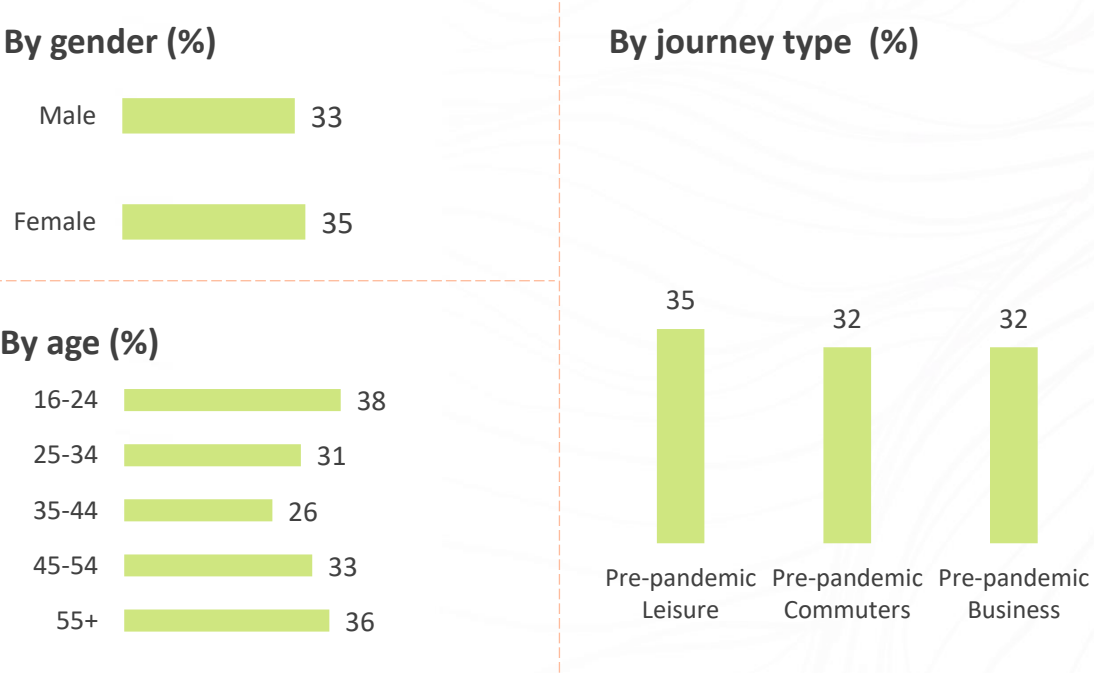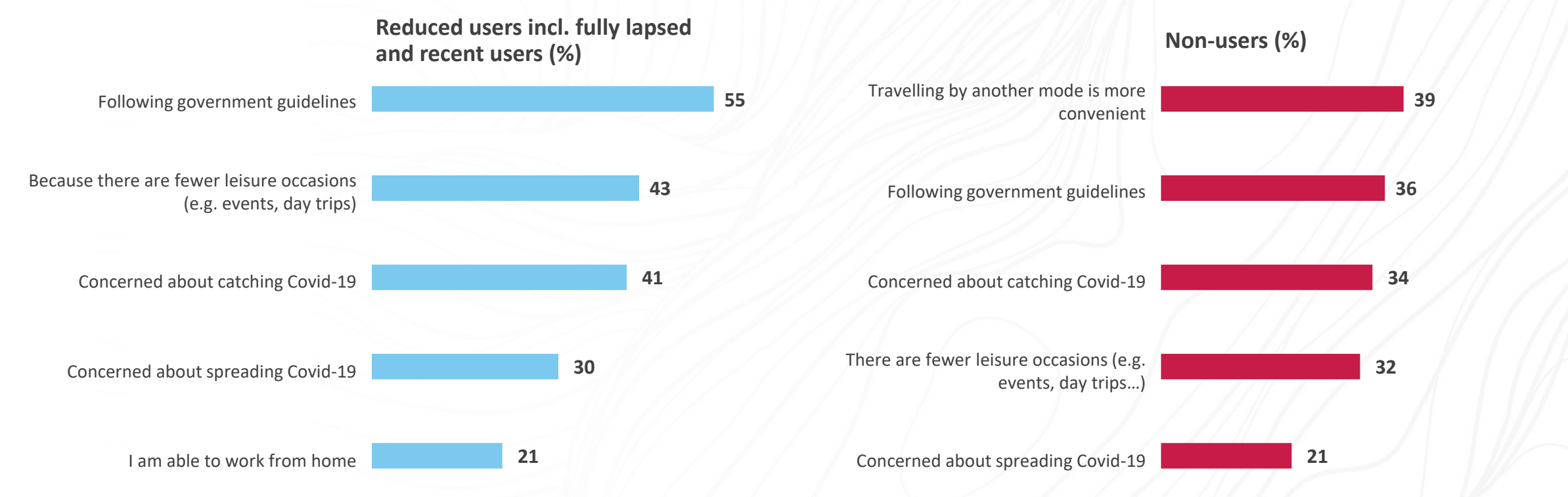- 25-34 — 26
- 35-44 — 31
- 45-54 — 27
- 55+ — 35

*Fieldwork for this project was carried out in March 2021*

9.5 Which are the following reasons why you don't currently travel by train?
Base: All non-users n = 2,500

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# Comparison of key reasons for using the train less often/not at all since Covid-19 started

**Covid related reasons are much more dominant for those travelling less often compared to non-users, highlighting the need for having Covid measures in place and communicating them**

**Top 5 reasons for using the train less often/not currently travelling by train**

**Reduced users incl. fully lapsed and recent users (%)**

| Reason | % |
|---|---|
| Following government guidelines | 55 |
| Because there are fewer leisure occasions (e.g. events, day trips) | 43 |
| Concerned about catching Covid-19 | 41 |
| Concerned about spreading Covid-19 | 30 |
| I am able to work from home | 21 |

**Non-users (%)**

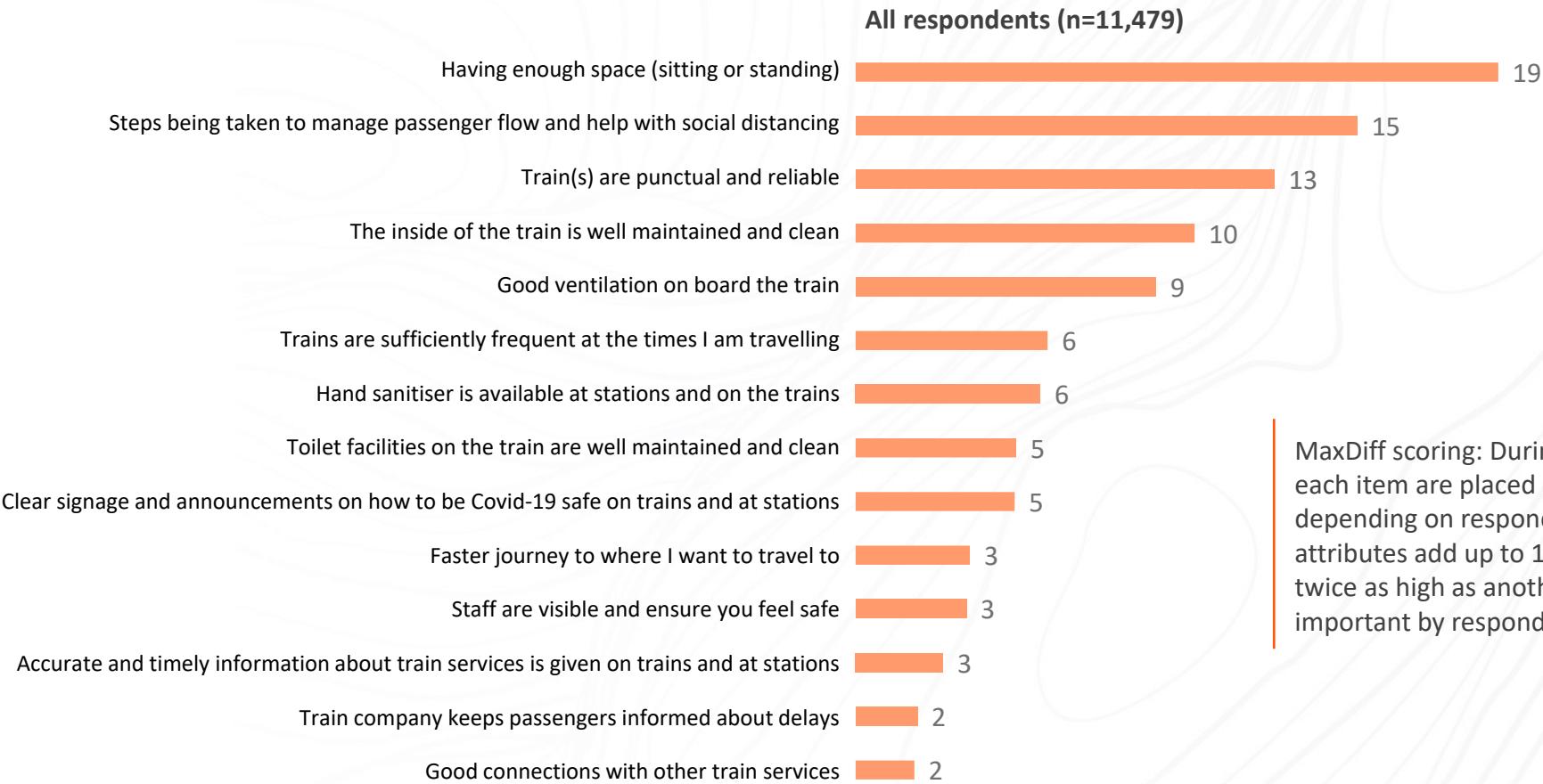| Reason | % |
|---|---|
| Travelling by another mode is more convenient | 39 |
| Following government guidelines | 36 |
| Concerned about catching Covid-19 | 34 |
| There are fewer leisure occasions (e.g. events, day trips…) | 32 |
| Concerned about spreading Covid-19 | 21 |

9.4 And why have you used trains less often since Covid-19?
Base: All travelling less often n = 6,893
9.5 Which are the following reasons why you don't currently travel by train?
Base: All travelling non-users n = 2,500

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**Priorities for improvement – what do users, lapsed users and non users need to take the train more often**

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# MaxDiff – Attribute importance when travelling by train right now (March 2021)

**The top two most important attributes relate to space and crowd control, an area that the sector needs to address as trains get busier. Punctuality and reliability is more crucial than some more Covid related attributes like cleanliness and good ventilation. These top priorities imply that the sector cannot allow for services to get back to how they were pre-pandemic**

**All respondents (n=11,479)**

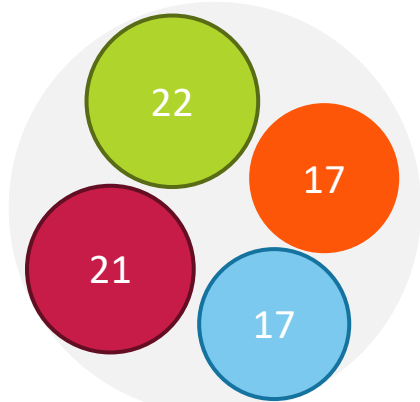| Attribute | Score |
|---|---|
| Having enough space (sitting or standing) | 19 |
| Steps being taken to manage passenger flow and help with social distancing | 15 |
| Train(s) are punctual and reliable | 13 |
| The inside of the train is well maintained and clean | 10 |
| Good ventilation on board the train | 9 |
| Trains are sufficiently frequent at the times I am travelling | 6 |
| Hand sanitiser is available at stations and on the trains | 6 |
| Toilet facilities on the train are well maintained and clean | 5 |
| Clear signage and announcements on how to be Covid-19 safe on trains and at stations | 5 |
| Faster journey to where I want to travel to | 3 |
| Staff are visible and ensure you feel safe | 3 |
| Accurate and timely information about train services is given on trains and at stations | 3 |
| Train company keeps passengers informed about delays | 2 |
| Good connections with other train services | 2 |

MaxDiff scoring: During the analysis scores for each item are placed on a scale of 0-100 depending on respondents' answer. Scores for all attributes add up to 100. If an attribute's score is twice as high as another, it is seen as twice as important by respondents

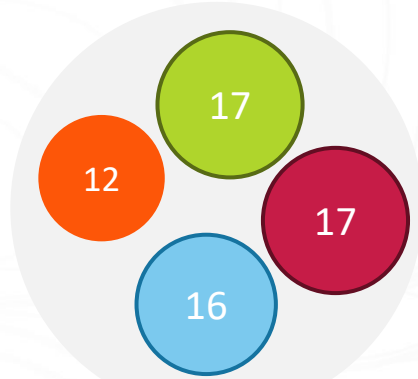*Fieldwork for this project was carried out in March 2021*

10.1 We will now show you some aspects of train travel. Thinking about travelling by train now – while Covid-19 is still present but assuming train travel is allowed – which one of these will be the MOST important to you and which one will be the LEAST important.
Base: All respondents n = 11,479

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# MaxDiff by user segment – Attribute importance when travelling by train right now (March 2021)

**Recent users put a greater emphasis on punctuality than any Covid related attributes whilst for fully lapsed and non-users punctuality is much further down the line; for them, as well as for non-recent users, space and crowding are top priorities**
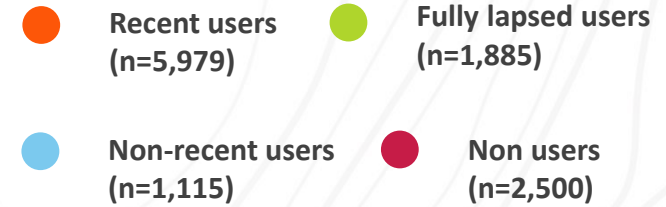


Having enough space (sitting or standing)
- 22
- 17
- 21
- 17

Steps being taken to manage passenger flow and help with social distancing
- 17
- 12
- 17
- 16

Train(s) are punctual and reliable
- 8
- 13
- 19
- 9

The inside of the train is well maintained and clean
- 12
- 8
- 9
- 12

Good ventilation on board the train
- 11
- 7
- 8
- 10

Trains are sufficiently frequent at the times I am travelling
- 9
- 4
- 5
- 4

Faster journey to where I want to travel to
- 6
- 2
- 2
- 3

**Legend:**
- Recent users (n=5,979)
- Fully lapsed users (n=1,885)
- Non-recent users (n=1,115)
- Non users (n=2,500)

10.1 We will now show you some aspects of train travel. Thinking about travelling by train now – while Covid-19 is still present but assuming train travel is allowed – which one of these will be the MOST important to you and which one will be the LEAST important.
Base: All respondents n = 11,479; Recent users n = 5,979; Fully lapsed users n = 1,885; Non-recent users n = 1,115; Non-users n = 2,500

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# Qual context – Crowd mitigation

**Passengers do not want to go back to the overcrowded trains from pre-pandemic times. Managing this and maintaining social distancing is shown to be most important by the MaxDiff (from the online survey) but is also the hardest challenge for the sector**

## How to control the crowds?

Passengers who used the train during the pandemic now love the space and travelling. There is, however, great concern, particularly amongst commuters, about how this will be maintained after lockdown when restrictions are eased and more people will travel by train

### Key takeaway:

Crowd mitigation emerges as a key concern for passengers during and post Covid-19. It is here to stay and the rail sector has to get a better handle on it. There are no obvious solutions for this but passengers don't want to return to 'squeezing onto a train'.

## What passengers want to see:

- **Crowd management pre-travel:** capacity checkers

- **Crowd management at stations:** effective communication, platform access control, train load information

- **Crowd management on the train:** controlled getting on and off (e.g. traffic light system), reserved seating where possible, more services during busier times or at least improved communication around that

- Alternative plans for when there is overcrowding

- What can be learned from crowd control in other markets, e.g. Europe, Asia where crowds are perceived to be handled better

*"I enjoyed it [travelling by train] because it was empty. I got a seat where I wanted. This is the good thing about Covid – there is space on trains."*

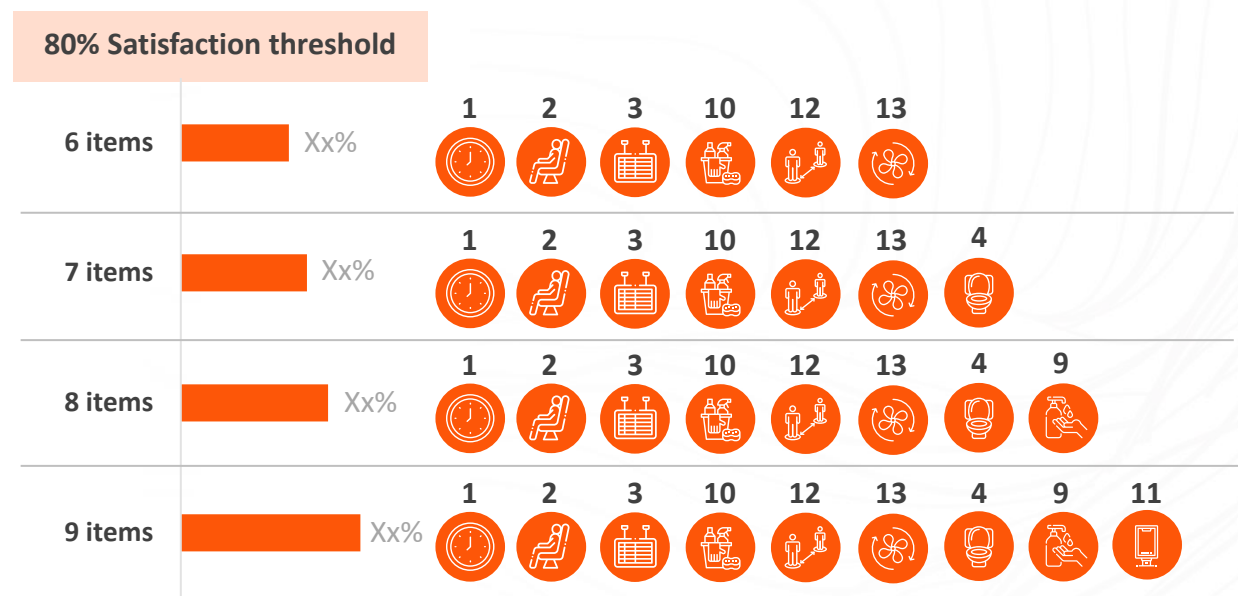**Disabled user, recent, leisure**

*"Ultimately, it does indeed feel much of a difference traveling now compared to pre-pandemic times, no overcrowding at stations, stations are much cleaner, no-ones rushing and particularly the absence of this during the typical London rush-hours."*

**Live journey, London**

*Fieldwork for this project was carried out in March 2021*

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# Introduction to TURF analysis

**In addition to the MaxDiff exercise just seen, we are also able to extract a TURF analysis from this data. This is described below.**

**80% Satisfaction threshold**

| | | 1 | 2 | 3 | 10 | 12 | 13 | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| 6 items | Xx% | | | | | | | | | |

| | | 1 | 2 | 3 | 10 | 12 | 13 | 4 | | |
|---|---|---|---|---|---|---|---|---|---|---|
| 7 items | Xx% | | | | | | | | | |

| | | 1 | 2 | 3 | 10 | 12 | 13 | 4 | 9 | |
|---|---|---|---|---|---|---|---|---|---|---|
| 8 items | Xx% | | | | | | | | | |

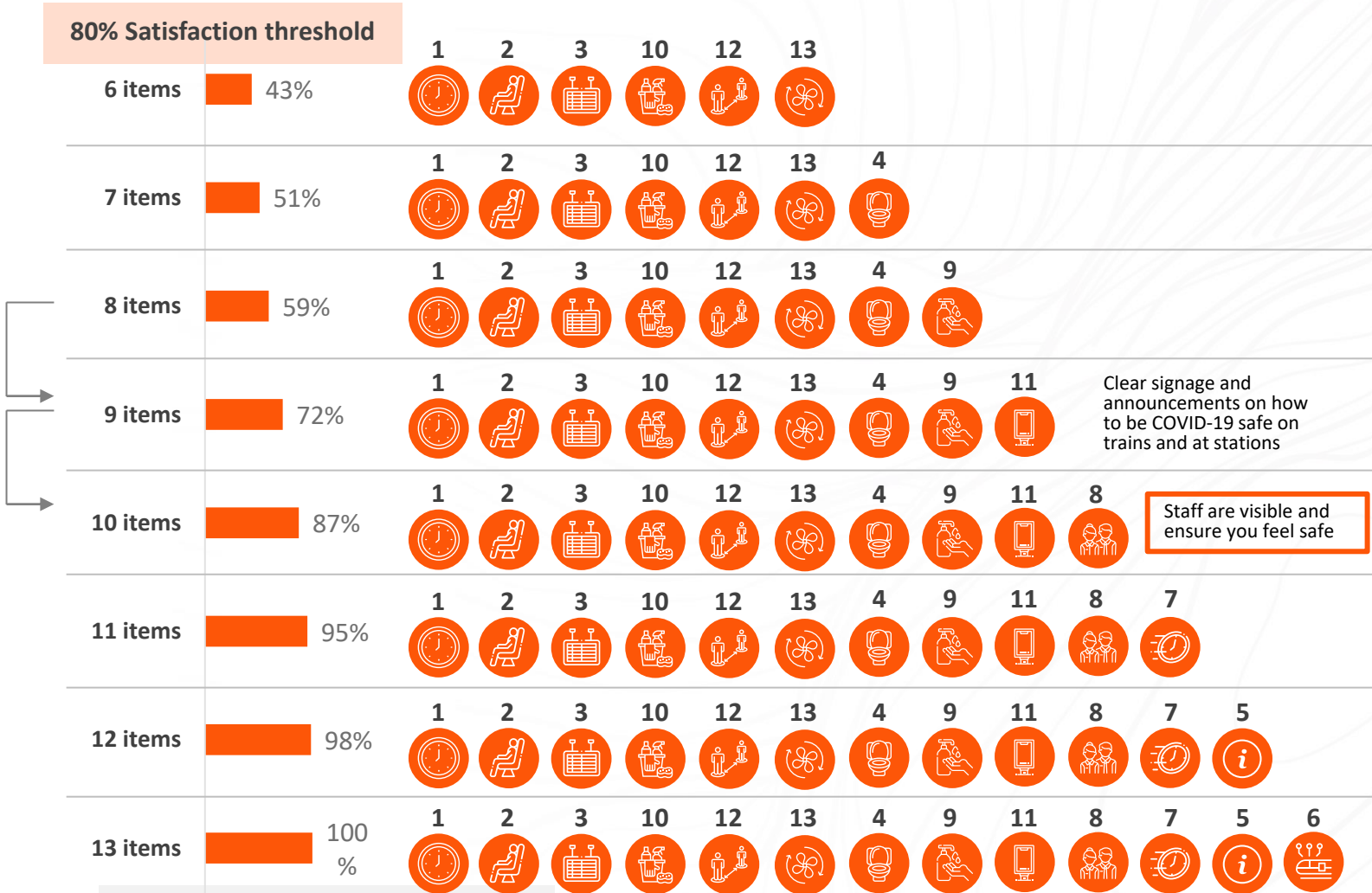| | | 1 | 2 | 3 | 10 | 12 | 13 | 4 | 9 | 11 |
|---|---|---|---|---|---|---|---|---|---|---|
| 9 items | Xx% | | | | | | | | | |

## Aim:

- The aim of the TURF is to maximize the utility by providing the best combination of attributes. However, there are different ways of measuring this hence we are optimising the utilities across the MaxDiff attributes.

## Theory:

- In this example, we decided to optimise up to an '80% threshold', so for any individual to count as sufficiently satisfied, the sum of their MaxDiff priorities must be 80 or higher. We then find the best combination of the attributes to give this score.

- There are several other thresholds possible from 50% to 95%. We chose 80% as this best meets an individual's core requirements.

- The example output provided displays the proportion of individuals who would meet this 80% satisfaction threshold as you increase the number of attributes from 6. The icons to the side display what these attributes are that account for the optimum combination of items.

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# TURF analysis – Most effective combination of items

**The most significant jump is seen from 9 to 10 items with the addition of <u>staff</u> being visible to ensure safety. At which point, almost 9 in 10 respondents will be satisfied with their journey**



**80% Satisfaction threshold**

| | | |
|---|---|---|
| 6 items | 43% | 1 2 3 10 12 13 |
| 7 items | 51% | 1 2 3 10 12 13 4 |
| 8 items | 59% | 1 2 3 10 12 13 4 9 |
| 9 items | 72% | 1 2 3 10 12 13 4 9 11 — Clear signage and announcements on how to be COVID-19 safe on trains and at stations |
| 10 items | 87% | 1 2 3 10 12 13 4 9 11 8 — Staff are visible and ensure you feel safe |
| 11 items | 95% | 1 2 3 10 12 13 4 9 11 8 7 |
| 12 items | 98% | 1 2 3 10 12 13 4 9 11 8 7 5 |
| 13 items | 100% | 1 2 3 10 12 13 4 9 11 8 7 5 6 |

Legend:

1. Train(s) are punctual and reliable
2. Having enough space (sitting or standing)
3. Trains are sufficiently frequent at the times I am travelling
4. Toilet facilities on the train are well maintained and clean
5. Accurate and timely information about train services is given on trains and at stations
6. Good connections with other train services
7. Faster journey to where I want to travel to
8. Staff are visible and ensure you feel safe
9. Hand sanitiser is available at stations and on the trains
10. The inside of the train is well maintained and clean
11. Clear signage and announcements on how to be COVID-19 safe on trains and at stations
12. Steps being taken to manage passenger flow and help with social distancing
13. Good ventilation on board the train

*Fieldwork for this project was carried out in March 2021*

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**Journey experience:
Key metrics**

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# Key summary – Journey experience and priorities for recent users

Overall **journey satisfaction** has been quite positive during the pandemic

**82%**

The main drivers that impact **train experience**:

Cleanliness     Comfort of seats     Sufficient ventilation

The greatest key driver **on overall satisfaction** is:

**the experience on the train**

Overall **station satisfaction** is slightly higher than journey satisfaction

**at 83%**

**Priorities for current train usage**

**1** The top priorities for current train usage are related to **crowding**:

- Having enough space (sitting or standing)
- Steps being taken to manage passenger flow and help with social distancing

**2** Recent users put a greater emphasis on **punctuality, frequency and speed**

**3** Need for train operators to **communicate** these

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# Journey metrics – Explanation slide

**In this section, we will see:**

- The performance of sectors on key satisfaction and experience metrics based on ratings of very and fairly satisfied and very and fairly good

- Results of the Key Driver Analysis

**Comparison between IRPS 2021 and NRPS Spring 2020:**

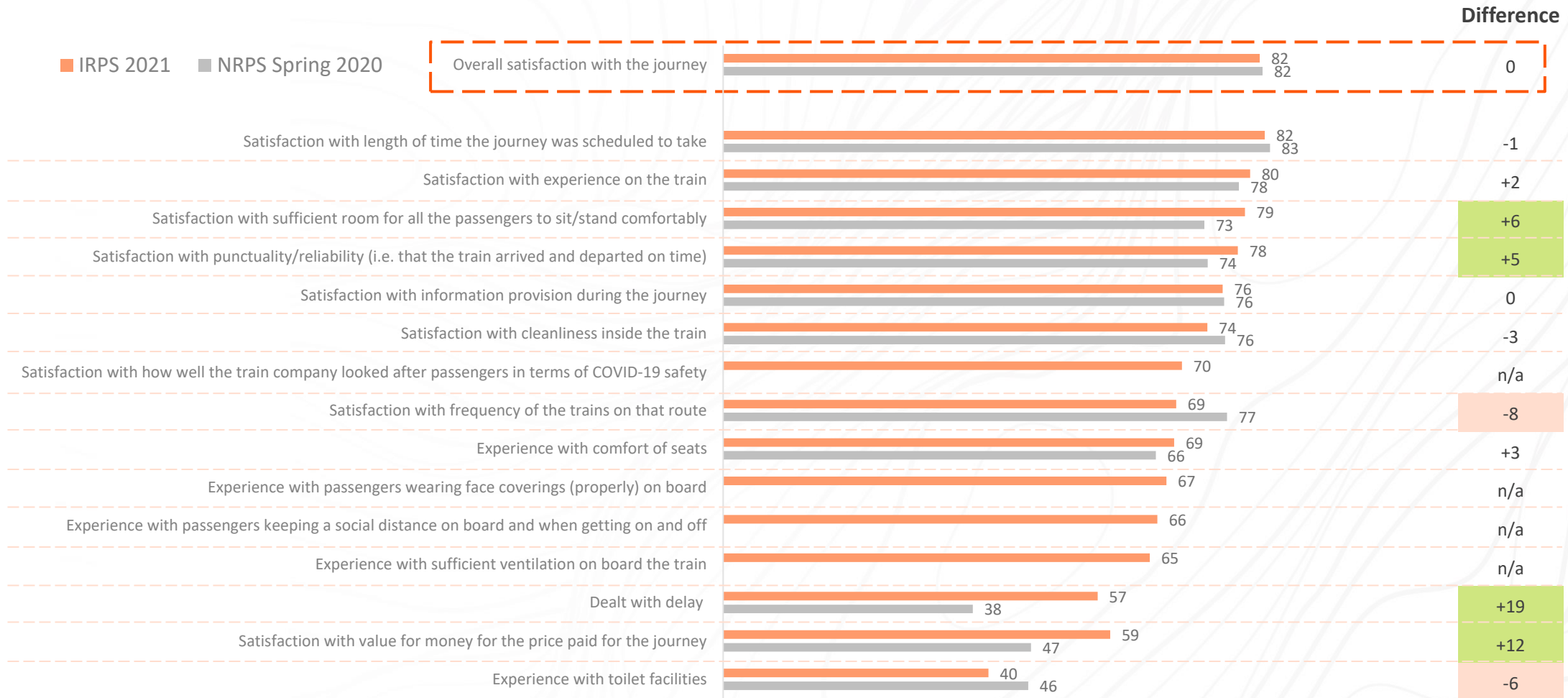- Metrics in the two surveys were asked differently – *please see table on the right*

| IRPS 2021 | NRPS Spring 2020 |
| --- | --- |
| **Overall journey satisfaction** | **Overall journey satisfaction** |
| Question: How satisfied were you with your journey on [TOC] overall? | Question: Taking into account [departure station] where you boarded the train and the actual train travelled on after being given this questionnaire, how satisfied were you with your journey today? |
| **Experience on the train** | **Experience on the train** |
| Question: Overall, how satisfied were you with the experience on the train of [TOC]? | Question: Overall, how satisfied were you with the train you boarded for your journey? |
| **Satisfaction with:**<br>**Punctuality/reliability of the train (i.e. that the train arrived and departed on time)**<br>**Sufficient room for all the passengers to sit/stand comfortably**<br>**How well the train company looked after passengers in terms of Covid-19 safety**<br>**Frequency of the trains on that route**<br>**Length of time the journey was scheduled to take** | **Satisfaction with:**<br>**Punctuality/reliability of the train (i.e. that the train arriving/departing on time)**<br>**Level of crowding**<br>**(Not asked in NRPS)**<br>**Frequency of the trains on that route**<br>**Length of time the journey was scheduled to take** |
| Question: We would like to understand how satisfied you were with the following for that journey…? Please base this on the journey with… [TOC] OR How satisfied were you with the following for that journey…? | Question: Based on your experience on that journey, how satisfied were you with…? |
| **Satisfaction with:**<br>**Cleanliness inside the train**<br>**Information provision during the journey** | **Rating of:**<br>**Cleanliness of the inside of the train**<br>**Provision of information during the journey** |
| Question: We would like to understand how satisfied you were with the following for that journey…? Please base this on the journey with… [TOC] OR How satisfied were you with the following for that journey…? | Question: How would you rate the train you boarded for that journey in terms of…? |
| **Satisfaction with value for money for the price you paid for this most recent journey** | **Satisfaction with value for money of the price of your ticket** |
| Question: How satisfied were you with the value for money for the price you paid for this most recent journey? | Question: Based on your experience on that journey, how satisfied were you with…? |
| **Experience with:**<br>**Cleanliness inside the train**<br>**Comfort of seats**<br>**Toilet facilities on board**<br>**Sufficient ventilation on board the train**<br>**Passengers keeping a social distance on board and when getting on and off**<br>**Passengers wearing face coverings (properly) on board** | **Rating of:**<br>**Cleanliness of the inside of the train**<br>**Comfort of seats**<br>**Toilet facilities on the train**<br>**(Not asked in NRPS)**<br>**(Not asked in NRPS)**<br>**(Not asked in NRPS)** |
| Question: And how would you rate the experience on the train [of TOC] for the following…? | Question: How would you rate the train you boarded for that journey in tems of…? |
| **Dealing with delays** | **Dealing with delays** |
| Question: How well did [TOC] deal with this delay? | Question: How well do you think the train company dealt with this delay? |

Note: Cleanliness is asked slightly differently depending on journey leg but combined into one metric for the same TOC
Scale for satisfaction: Very/fairly satisfied, neither satisfied nor dissatisfied, fairly/very dissatisfied
Scale for experience and rating: very/fairly good, neither good nor poor, fairly/very poor

*Fieldwork for this project was carried out in March 2021*

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# National results on satisfaction and experience

**Overall journey satisfaction records the same level during the pandemic compared to Spring 2020, however, slightly more individual metrics improve and to a greater extent, implying a more positive experience although more factors were included in the NRPS**

**Difference**

■ IRPS 2021   ■ NRPS Spring 2020

| Metric | IRPS 2021 | NRPS Spring 2020 | Difference |
|---|---|---|---|
| Overall satisfaction with the journey | 82 | 82 | 0 |
| Satisfaction with length of time the journey was scheduled to take | 82 | 83 | -1 |
| Satisfaction with experience on the train | 80 | 78 | +2 |
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | 79 | 73 | +6 |
| Satisfaction with punctuality/reliability (i.e. that the train arrived and departed on time) | 78 | 74 | +5 |
| Satisfaction with information provision during the journey | 76 | 76 | 0 |
| Satisfaction with cleanliness inside the train | 74 | 76 | -3 |
| Satisfaction with how well the train company looked after passengers in terms of COVID-19 safety | 70 | | n/a |
| Satisfaction with frequency of the trains on that route | 69 | 77 | -8 |
| Experience with comfort of seats | 69 | 66 | +3 |
| Experience with passengers wearing face coverings (properly) on board | 67 | | n/a |
| Experience with passengers keeping a social distance on board and when getting on and off | 66 | | n/a |
| Experience with sufficient ventilation on board the train | 65 | | n/a |
| Dealt with delay | 57 | 38 | +19 |
| Satisfaction with value for money for the price paid for the journey | 59 | 47 | +12 |
| Experience with toilet facilities | 40 | 46 | -6 |

3.3, 4.7, 6.9 How satisfied were you with your journey on [TOC] overall? Base: Recent trips n = 8,961
3.2, 4.1, 6.8 We would like to understand how satisfied you were with the following for that journey…?
Base: Recent trips  n = 8,961
4.3 Overall, how satisfied were you with the experience on the train of [TOC]? Base: Recent users  n = 5,771
4.6 How well did [TOC] deal with this delay? Recent users who experienced a delay Base: n = 2,164

*Fieldwork for this project was carried out in March 2021*

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# Qual context – what was it like to travel during the pandemic?

**Like other areas of our lives, train travel during Covid-19 has disrupted the norm and set a new precedent for many passengers**

## Train experience during Covid-19

Train travel during the pandemic has been a considerably more positive experience for many passengers compared to pre-pandemic. For others, expectations have changed which operators must keep up with.

### Key takeaway:

Passengers want to maintain the generally more positive experience that has emerged during the pandemic and are concerned about returning to the crowding, service issues etc. they encountered pre-pandemic.

*"There was no need to queue up in order to leave the train before the doors close and the train departs [on time] due to the minority of people traveling - indeed a pleasurable and stress-free travel experience."*

**Live journey, London**

## The key reasons for this are:

1. Stations and trains are less crowded (e.g. fewer and shorter queues, getting a seat, etc.)

2. Services are less disrupted and more punctual (to some extent driven by point 1)

3. Trains are cleaner (and passengers actually see cleaning staff) but more could be done

Whilst this seems to be the general sentiment, there have been incidences where the experience has been dented by some issues:

1. Cleanliness expectations have increased and is now more heavily scrutinised by passengers

2. No staff available at smaller stations (and later in the evening)

3. Old and tired train stock (which does not give the impression of cleanliness)

*"Please, please, please give us clean trains."*

**Recent user, leisure**

*Fieldwork for this project was carried out in March 2021*

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# Key Driver Analysis (KDA) explanation

Statistical techniques examine relationships to *infer importance.*

**Key driver analysis assesses all variables simultaneously** and the interactions between them. It identifies which combinations are the best predictors.



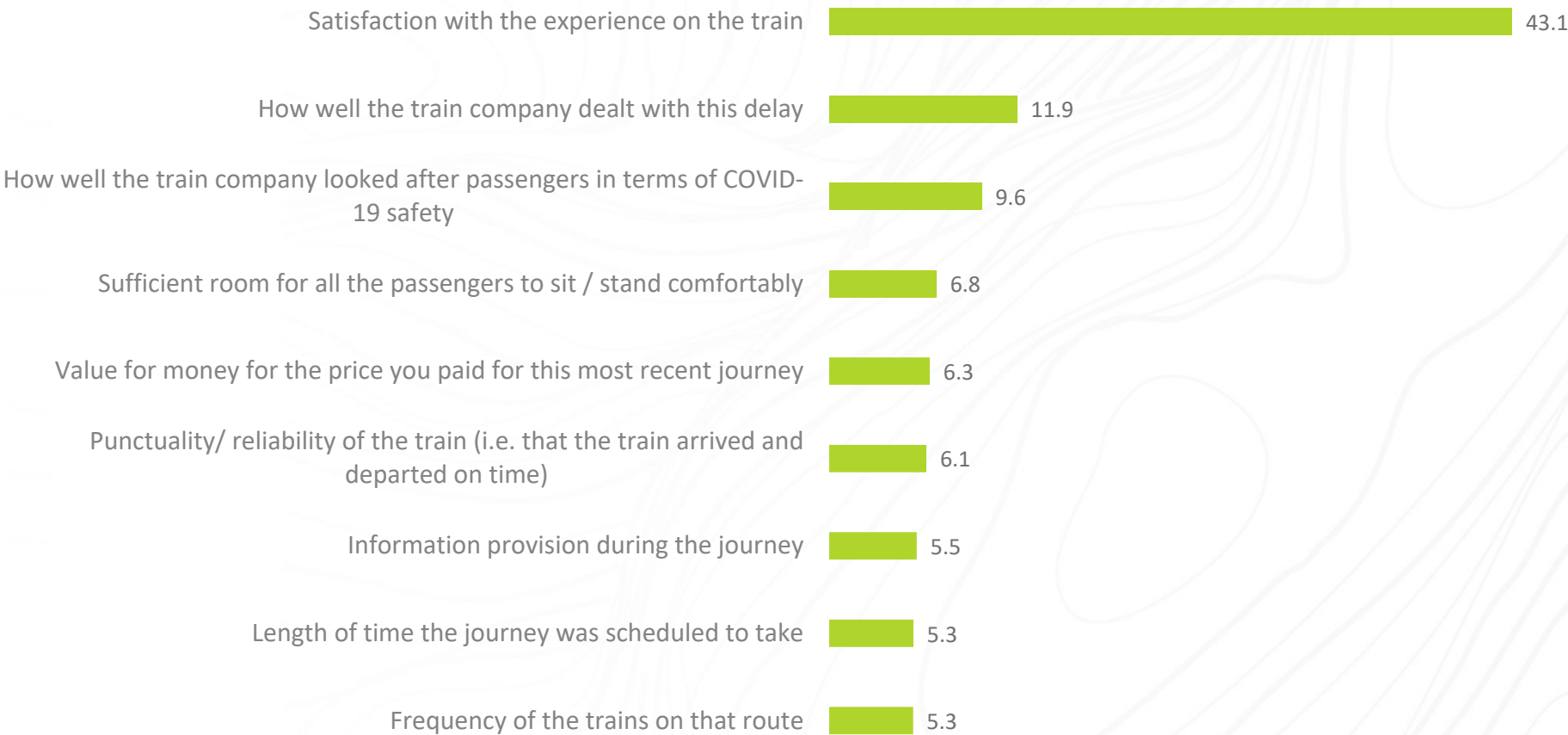**The output from the KDA shows the impact of each significant attribute overall journey satisfaction**

- We have based the scores to be out of 100 for ease of interpretation

- This makes it easier to see the relative importance between attributes as well as how much of the total variance explained is attributed to each attribute

- The total variance explained describes how much of the variation in overall journey satisfaction can be explained using all the drivers – the variance explained (around 0.5 for satisfaction and dissatisfaction) shows the model is doing a good job of explaining overall journey satisfaction but hat other factors, not easily covered within a survey, also have an influence (this might include passengers' frame of mind, impact of the weather on the day, and so on)

- We created two KDAs – one to explain the key drivers for overall journey satisfaction that includes 'experience on the train' as an umbrella for on board elements; the second KDA shows the key drivers for 'experience on the train' based on on board attributes

- Both KDAs are based on satisfaction in line with previous NRPS analysis, rather than satisfaction and dissatisfaction combined

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# Results of the key driver analysis on overall journey satisfaction incl. train experience

**The dominant driver of overall journey satisfaction by some margin is the on train experience. The top three drivers are all in the control of the train operator who therefore has a strong influence on overall satisfaction**

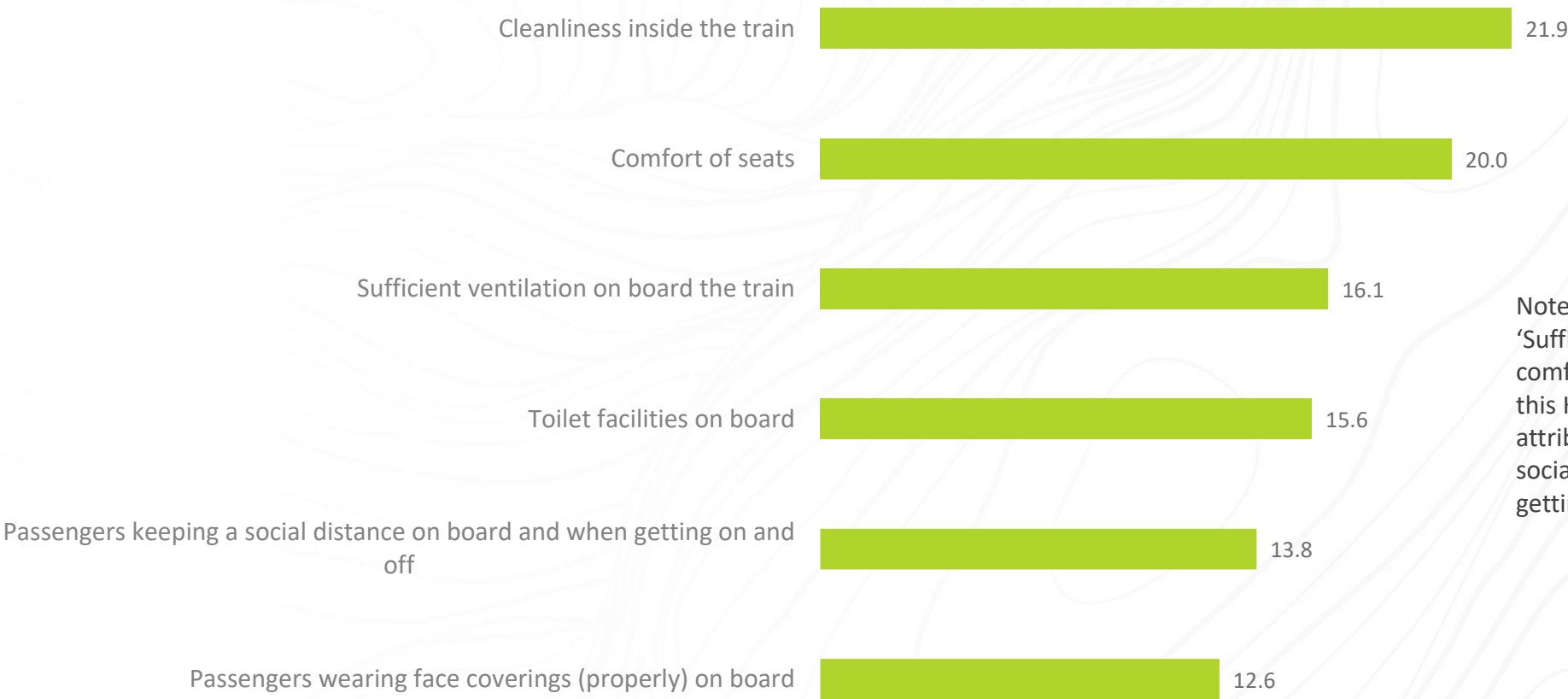**Key drivers of overall journey satisfaction (all adding to 100)**

| Driver | Value |
|---|---|
| Satisfaction with the experience on the train | 43.1 |
| How well the train company dealt with this delay | 11.9 |
| How well the train company looked after passengers in terms of COVID-19 safety | 9.6 |
| Sufficient room for all the passengers to sit / stand comfortably | 6.8 |
| Value for money for the price you paid for this most recent journey | 6.3 |
| Punctuality/ reliability of the train (i.e. that the train arrived and departed on time) | 6.1 |
| Information provision during the journey | 5.5 |
| Length of time the journey was scheduled to take | 5.3 |
| Frequency of the trains on that route | 5.3 |

*Fieldwork for this project was carried out in March 2021*

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# Results of the key driver analysis on train experience

**Driver influence is more evenly spread for train experience. Cleanliness inside the train is again an item that can be controlled by the train operator, but the other features are less under the train operators control although they can exercise some influence on them**

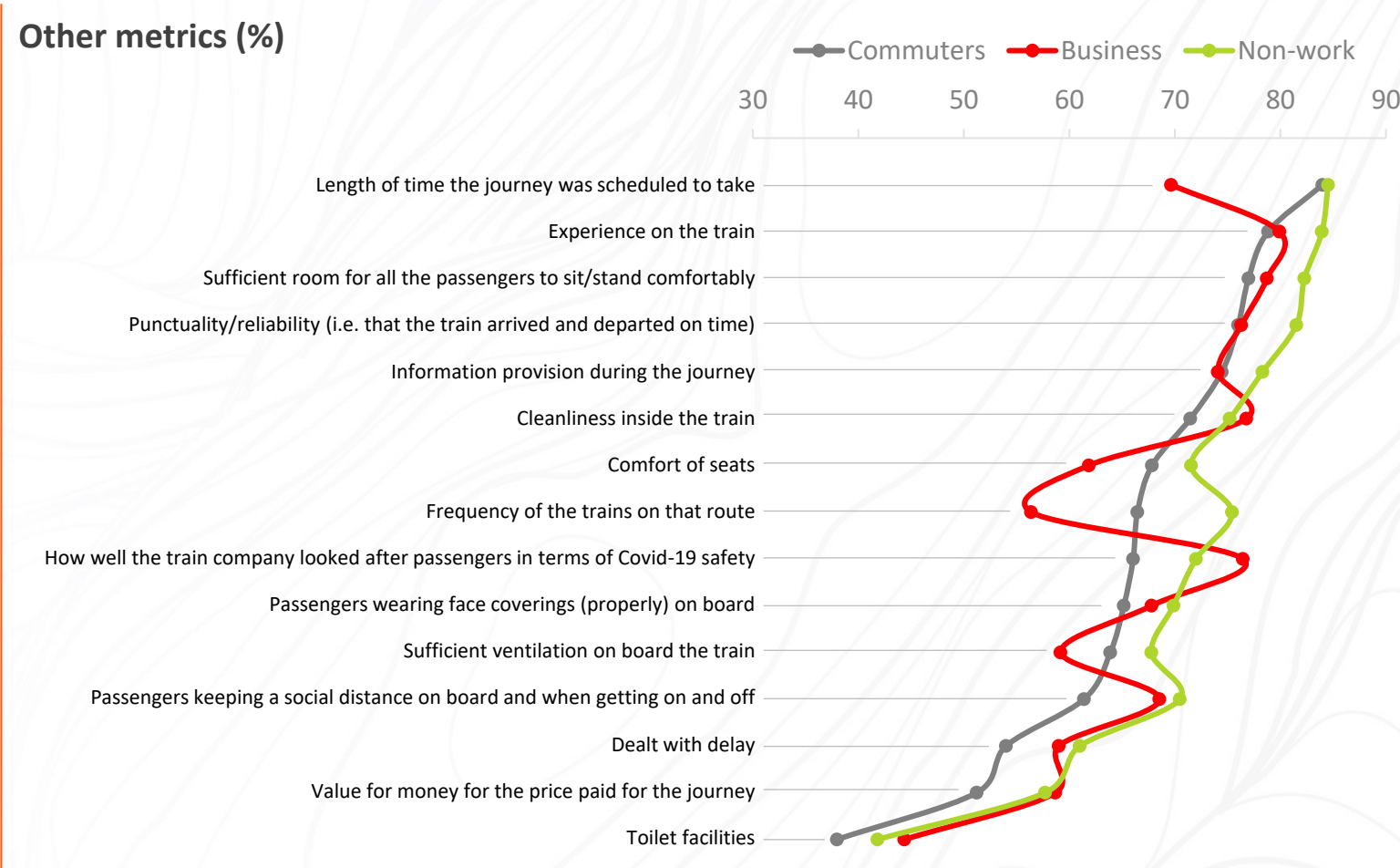### Key drivers of train experience (all adding to 100)

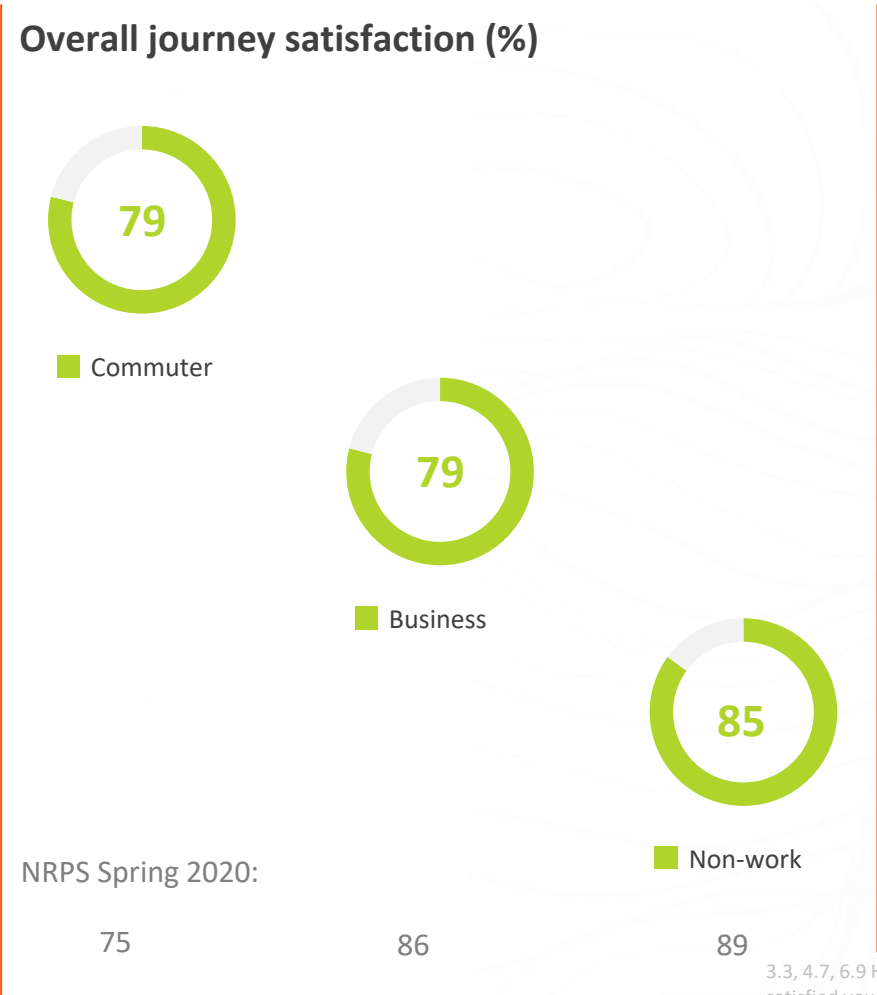| | |
|---|---|
| Cleanliness inside the train | 21.9 |
| Comfort of seats | 20.0 |
| Sufficient ventilation on board the train | 16.1 |
| Toilet facilities on board | 15.6 |
| Passengers keeping a social distance on board and when getting on and off | 13.8 |
| Passengers wearing face coverings (properly) on board | 12.6 |

Note:
'Sufficient room to sit / stand comfortably' not included here since this KDA already includes a crowding attribute with 'Passengers keeping social distance on board and when getting on and off'

*Fieldwork for this project was carried out in March 2021*

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# Satisfaction and experience by journey purpose

**Ratings among commuter and non-work travellers show a similar trend although the latter are generally higher; business passengers record a lower rating on journey length, train frequency and ventilation but are more positive about Covid safety**

## Overall journey satisfaction (%)

**79**
■ Commuter

**79**
■ Business

**85**
■ Non-work

NRPS Spring 2020:

75          86          89

*Fieldwork for this project was carried out in March 2021*

## Other metrics (%)



Legend: Commuters · Business · Non-work

Scale: 30 40 50 60 70 80 90

Metrics (top to bottom):
- Length of time the journey was scheduled to take
- Experience on the train
- Sufficient room for all the passengers to sit/stand comfortably
- Punctuality/reliability (i.e. that the train arrived and departed on time)
- Information provision during the journey
- Cleanliness inside the train
- Comfort of seats
- Frequency of the trains on that route
- How well the train company looked after passengers in terms of Covid-19 safety
- Passengers wearing face coverings (properly) on board
- Sufficient ventilation on board the train
- Passengers keeping a social distance on board and when getting on and off
- Dealt with delay
- Value for money for the price paid for the journey
- Toilet facilities

3.3, 4.7, 6.9 How satisfied were you with your journey on [TOC] overall? 3.2, 4.1, 6.8 We would like to understand how satisfied you were with the following for that journey…? Base: Commuters n = 3,489; Business n = 736; Non-work n = 4,736
Base: 4.3 Overall, how satisfied were you with the experience on the train of [TOC]? Base: Commuters n = 2,288; Business n = 438; Non-work n = 3,045
4.6 How well did [TOC] deal with this delay? Base: Commuters n = 1,003; Business n = 170; Non-work n = 991

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# Sector results on satisfaction and experience – overall and key movers

**Reflecting the national picture, the overall journey satisfaction is also fairly consistent across sectors; attributes that record the most pronounced changes are very similar**
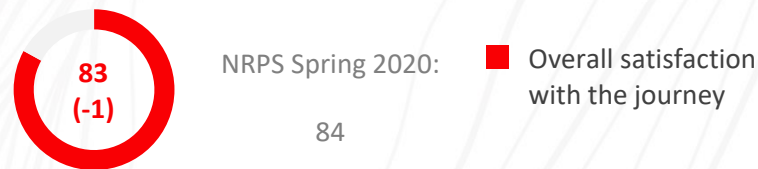
## London & South East

**81 (-1)**

NRPS Spring 2020: 82

🟥 Overall satisfaction with the journey

| | |
|---|---|
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | **+6** |
| Satisfaction with frequency of the trains on that route | **-7** |
| Satisfaction with value for money for the price paid for the journey | **+13** |
| Dealt with delay | **+20** |
| Experience with toilet facilities | **-6** |

## Long distance

**84 (-)**

NRPS Spring 2020: 84

🟦 Overall satisfaction with the journey

| | |
|---|---|
| Satisfaction with punctuality/reliability (i.e. that the train arrived and departed on time) | **+8** |
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | **+9** |
| Satisfaction with length of time the journey was scheduled to take | **-8** |
| Satisfaction with frequency of the trains on that route | **-11** |
| Satisfaction with value for money for the price paid for the journey | **+12** |
| Dealt with delay | **+15** |

## Regional

**83 (-1)**

NRPS Spring 2020: 84

🟥 Overall satisfaction with the journey

| | |
|---|---|
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | **+8** |
| Satisfaction with experience on the train | **+5** |
| Satisfaction with punctuality/reliability (i.e. that the train arrived and departed on time) | **+8** |
| Satisfaction with frequency of the trains on that route | **-9** |
| Dealt with delay | **+9** |
| Experience with toilet facilities | **+15** |

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# London & South East sector results on satisfaction and experience

**In the London & South East sector overall satisfaction is broadly consistent when comparing pre-pandemic to recent usage; passengers are considerably more satisfied with value for money and crowding levels but ratings are lower for frequency and toilet facilities**
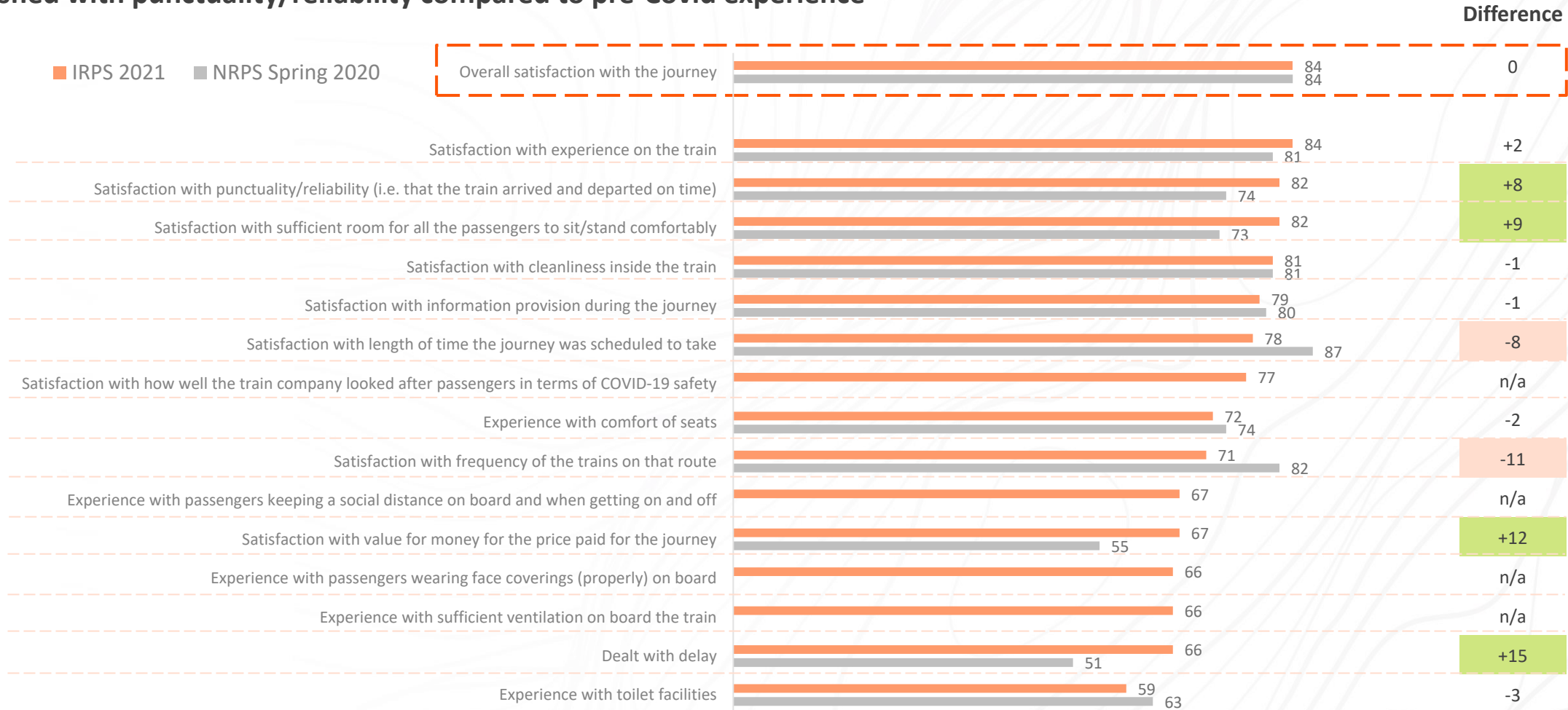
**Difference**

■ IRPS 2021  ■ NRPS Spring 2020

| Measure | IRPS 2021 | NRPS Spring 2020 | Difference |
|---|---|---|---|
| Overall satisfaction with the journey | 81 | 82 | -1 |
| Satisfaction with length of time the journey was scheduled to take | 82 | 82 | 0 |
| Satisfaction with experience on the train | 79 | 78 | +1 |
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | 79 | 73 | +6 |
| Satisfaction with punctuality/reliability (i.e. that the train arrived and departed on time) | 78 | 74 | +4 |
| Satisfaction with information provision during the journey | 76 | 76 | 0 |
| Satisfaction with cleanliness inside the train | 73 | 76 | -3 |
| Satisfaction with frequency of the trains on that route | 69 | 76 | -7 |
| Satisfaction with how well the train company looked after passengers in terms of COVID-19 safety | 69 | | n/a |
| Experience with comfort of seats | 68 | 64 | +4 |
| Experience with passengers wearing face coverings (properly) on board | 67 | | n/a |
| Experience with passengers keeping a social distance on board and when getting on and off | 66 | | n/a |
| Experience with sufficient ventilation on board the train | 64 | | n/a |
| Satisfaction with value for money for the price paid for the journey | 57 | 45 | +13 |
| Dealt with delay | 57 | 37 | +20 |
| Experience with toilet facilities | 38 | 44 | -6 |

3.3, 4.7, 6.9 How satisfied were you with your journey on [TOC] overall?; 3.2, 4.1, 6.8 We would like to understand how satisfied you were with the following for that journey…? Base: Recent trips with London & South East operators n = 5,636
4.3 Overall, how satisfied were you with the experience on the train of [TOC]? Base: Recent users of  London & South East operators  n = 3,520
4.6 How well did [TOC] deal with this delay? Recent users of London & South East operators who experienced a delay
Base:  n = 1,318

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# Long distance sector results on satisfaction and experience

**Development in the long distance sector is similar to national and London & South East, although here passengers are much more satisfied with punctuality/reliability compared to pre-Covid experience**
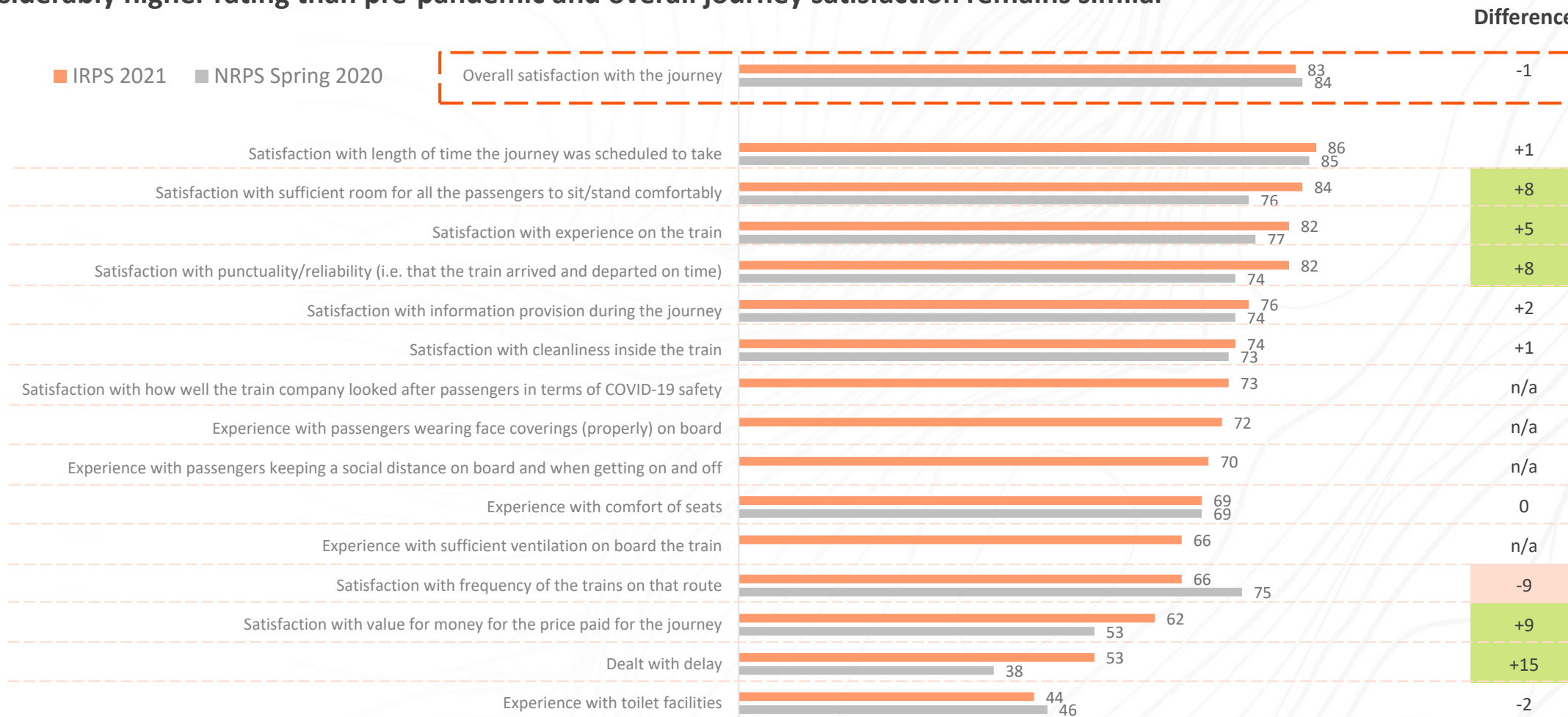
**Difference**

Legend: ■ IRPS 2021   ■ NRPS Spring 2020

| Measure | IRPS 2021 | NRPS Spring 2020 | Difference |
|---|---|---|---|
| Overall satisfaction with the journey | 84 | 84 | 0 |
| Satisfaction with experience on the train | 84 | 81 | +2 |
| Satisfaction with punctuality/reliability (i.e. that the train arrived and departed on time) | 82 | 74 | +8 |
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | 82 | 73 | +9 |
| Satisfaction with cleanliness inside the train | 81 | 81 | -1 |
| Satisfaction with information provision during the journey | 79 | 80 | -1 |
| Satisfaction with length of time the journey was scheduled to take | 78 | 87 | -8 |
| Satisfaction with how well the train company looked after passengers in terms of COVID-19 safety | 77 | | n/a |
| Experience with comfort of seats | 72 | 74 | -2 |
| Satisfaction with frequency of the trains on that route | 71 | 82 | -11 |
| Experience with passengers keeping a social distance on board and when getting on and off | 67 | | n/a |
| Satisfaction with value for money for the price paid for the journey | 67 | 55 | +12 |
| Experience with passengers wearing face coverings (properly) on board | 66 | | n/a |
| Experience with sufficient ventilation on board the train | 66 | | n/a |
| Dealt with delay | 66 | 51 | +15 |
| Experience with toilet facilities | 59 | 63 | -3 |

*Fieldwork for this project was carried out in March 2021*

3.3, 4.7, 6.9 How satisfied were you with your journey on [TOC] overall?; 3.2, 4.1, 6.8 We would like to understand how satisfied you were with the following for that journey…? Recent trips with Long distance operators Base: n = 1,624
4.3 Overall, how satisfied were you with the experience on the train of [TOC]? Recent users of Long distance operators Base: n = 1,029
4.6 How well did [TOC] deal with this delay? Recent users of Long distance operators who experienced a delay Base: n = 407

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# Regional sector results on satisfaction and experience

**The regional sector records only one measure declining notably which is frequency of trains; a number of attributes achieve a considerably higher rating than pre-pandemic and overall journey satisfaction remains similar**

Difference

■ IRPS 2021   ■ NRPS Spring 2020

| Attribute | IRPS 2021 | NRPS Spring 2020 | Difference |
|---|---|---|---|
| Overall satisfaction with the journey | 83 | 84 | -1 |
| Satisfaction with length of time the journey was scheduled to take | 86 | 85 | +1 |
| Satisfaction with sufficient room for all the passengers to sit/stand comfortably | 84 | 76 | +8 |
| Satisfaction with experience on the train | 82 | 77 | +5 |
| Satisfaction with punctuality/reliability (i.e. that the train arrived and departed on time) | 82 | 74 | +8 |
| Satisfaction with information provision during the journey | 76 | 74 | +2 |
| Satisfaction with cleanliness inside the train | 74 | 73 | +1 |
| Satisfaction with how well the train company looked after passengers in terms of COVID-19 safety | 73 | | n/a |
| Experience with passengers wearing face coverings (properly) on board | 72 | | n/a |
| Experience with passengers keeping a social distance on board and when getting on and off | 70 | | n/a |
| Experience with comfort of seats | 69 | 69 | 0 |
| Experience with sufficient ventilation on board the train | 66 | | n/a |
| Satisfaction with frequency of the trains on that route | 66 | 75 | -9 |
| Satisfaction with value for money for the price paid for the journey | 62 | 53 | +9 |
| Dealt with delay | 53 | 38 | +15 |
| Experience with toilet facilities | 44 | 46 | -2 |

3.3, 4.7, 6.9 How satisfied were you with your journey on [TOC] overall?; 3.2, 4.1, 6.8 We would like to understand how satisfied you were with the following for that journey…? Base: Recent trips with Regional operators n = 1,594
4.3 Overall, how satisfied were you with the experience on the train of [TOC]? Base: Recent users of Regional operators n = 1,167
4.6 How well did [TOC] deal with this delay? Recent users of Regional operators who experienced a delay
Base: n = 409

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**Taking the train during Covid – what can we learn from users' experience**

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# Development of overall journey satisfaction during the pandemic

**Overall journey satisfaction was at its highest before the 2nd lockdown and then receded and dropped again when the 3rd lockdown came into force; but then it recovered before the publication of the roadmap**

**% rating fairly and very satisfied**
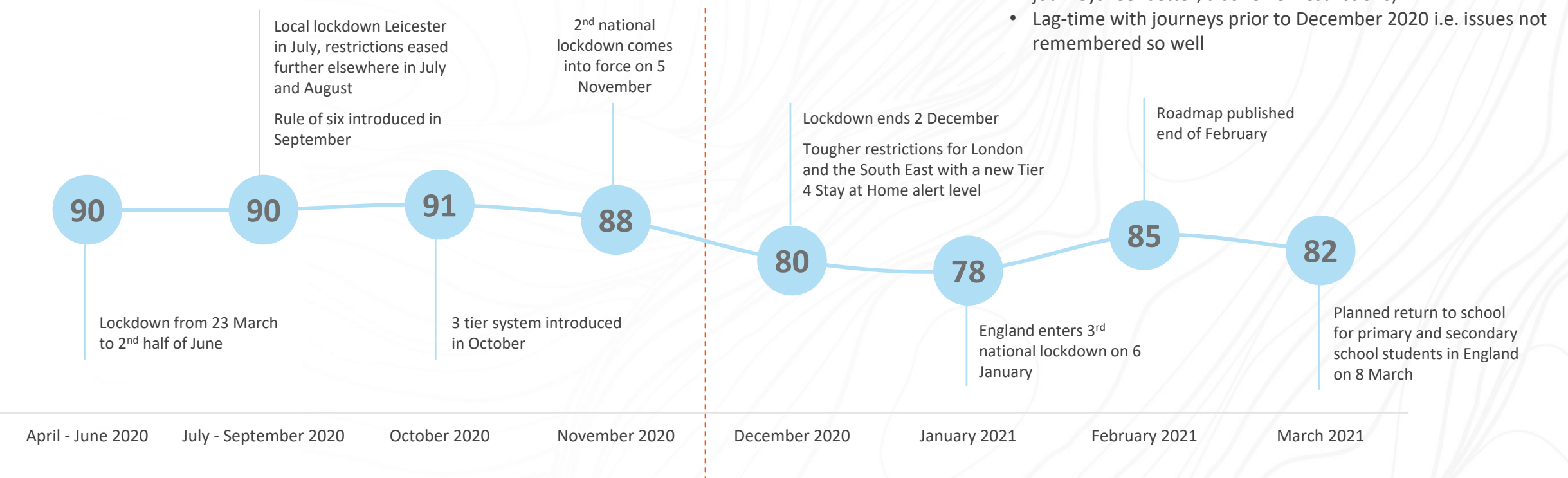
The following points may have impacted results:
- Satisfaction asked prior to December 2020 was not TOC specific
- Seasonality could have boosted ratings during summer (summer journeys feel better; also fewer restrictions)
- Lag-time with journeys prior to December 2020 i.e. issues not remembered so well



Local lockdown Leicester in July, restrictions eased further elsewhere in July and August

Rule of six introduced in September

2nd national lockdown comes into force on 5 November

Lockdown ends 2 December

Tougher restrictions for London and the South East with a new Tier 4 Stay at Home alert level

Roadmap published end of February

Lockdown from 23 March to 2nd half of June

3 tier system introduced in October

England enters 3rd national lockdown on 6 January

Planned return to school for primary and secondary school students in England on 8 March

| 90 | 90 | 91 | 88 | 80 | 78 | 85 | 82 |

April - June 2020 | July - September 2020 | October 2020 | November 2020 | December 2020 | January 2021 | February 2021 | March 2021

Note: Data prior to December 2020 is not TOC specific and therefore does not carry a journey level weight
3.3, 4.7, 6.9 How satisfied were you with your journey on [TOC] overall? Base: April-June  n=129, July –September n=511, October n=250, November n=201, December n=1,875, January n=1,129, February n=1,593, March n=4,363

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# Satisfaction with overall journey – non-recent rail users during the pandemic

**Of those who last travelled before December 2020, journey satisfaction was notably higher than in the last three months during fieldwork (82%). However this could have been impacted by lag-time, seasonal effect or because the question was not TOC specific; satisfaction levels were notably lower amongst the youngest passengers**

Very Satisfied ●
Fairly Satisfied ●
Neither ●
Fairly dissatisfied ●
Very dissatisfied ●
Don't know ●

| 46 |
| 43 |
| 7 |
| 2 |

**90%**
Net Satisfied

## Satisfaction by age (%)

| Age | % |
|-----|-----|
| 16-24 | 87 |
| 25-34 | 91 |
| 35-44 | 90 |
| 45-54 | 91 |
| 55+ | 91 |
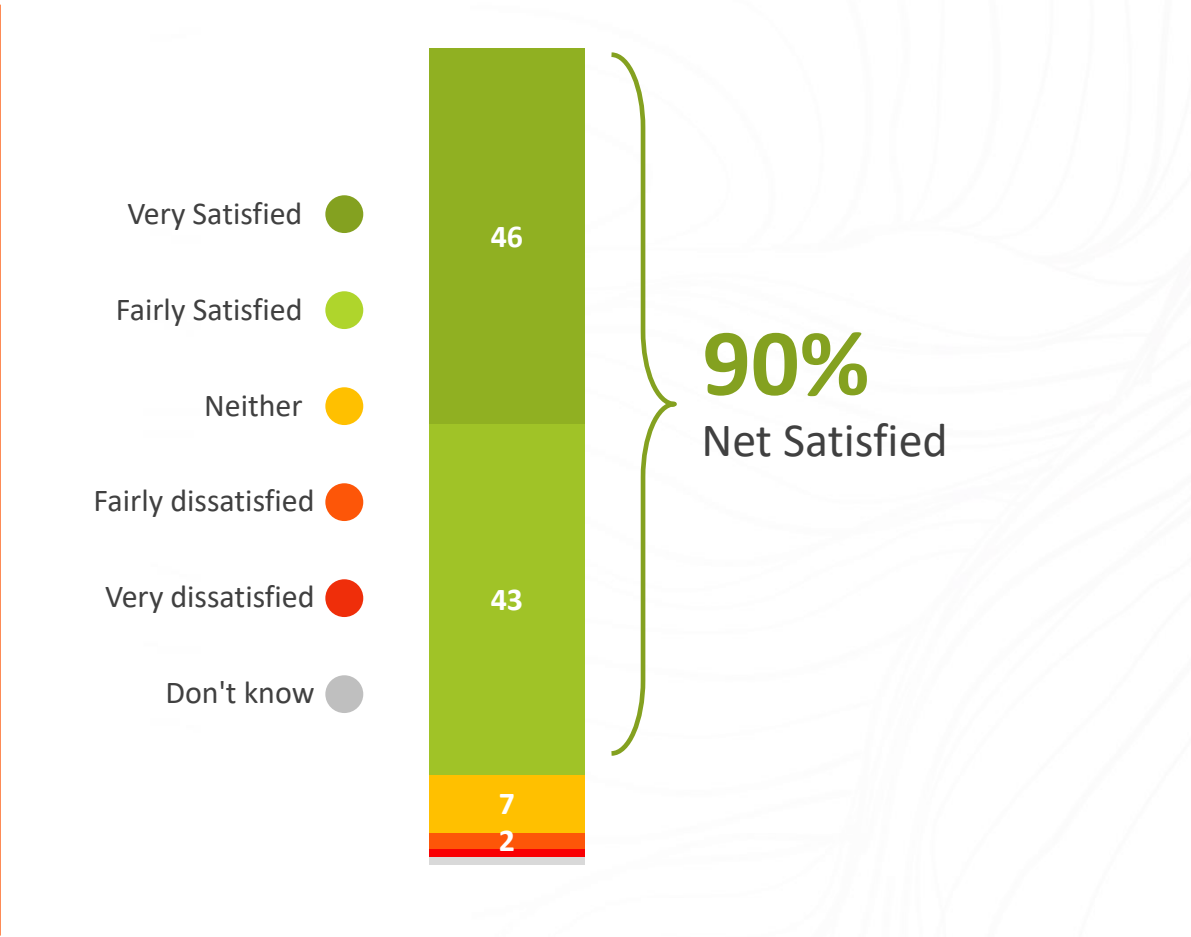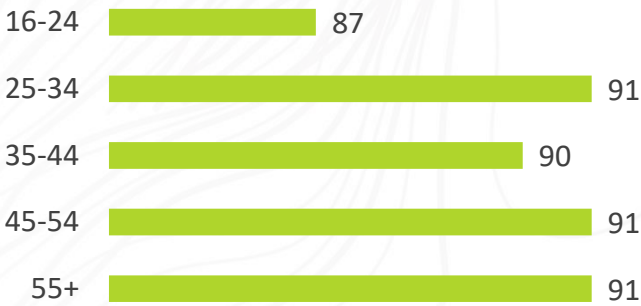
## Satisfaction by safety (%)

| | % |
|---|---|
| Felt safe from Covid-19 | 96 |
| Felt unsafe from Covid-19 (low base) | 54 |
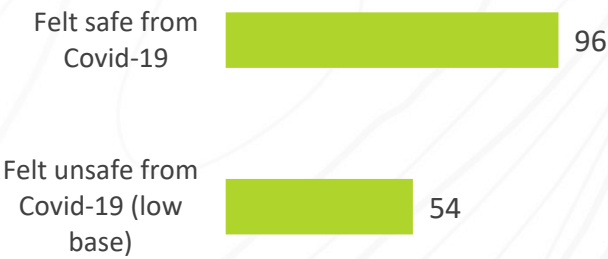
*Fieldwork for this project was carried out in March 2021*

7.9. Taking into account the start station when you boarded the actual train company (ies) you travelled with, how satisfied were you with your overall journey?
Base: All respondents with experience during the pandemic but not recent users n = 1,115

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# Satisfaction – with journey elements amongst non-recent rail users in the pandemic

**Ratings on other elements were also considerably higher for those last travelling before December 2020. The vast majority of rail users had their expectations met or exceeded**

Satisfaction/ expectations with rail experience (%)

|  | Net: Better than expected (%) | Net: Worse than expected (%) |
|---|---|---|
| **Punctuality/ reliability of the train** — 3% Net Dissatisfied / 92% Net Satisfied — 1 2 \| 5 \| 36 \| 56 | 48 | 4 |
| **Sufficient room for all the passengers to sit/ stand comfortably** — 7% Net Dissatisfied / 84% Net Satisfied — 2 \| 5 \| 9 \| 31 \| 54 | 48 | 9 |
| **Cleanliness inside the train** — 7% Net Dissatisfied / 80% Net Satisfied — 1 \| 6 \| 13 \| 1 \| 38 \| 42 | 40 | 10 |
| **How well the train company looked after passengers in terms of Covid-19 safety** — 6% Net Dissatisfied / 75% Net Satisfied — 2 \| 4 \| 15 \| 5 \| 35 \| 40 | 41 | 9 |

- ■ Very dissatisfied
- ■ Fairly dissatisfied
- ■ Neither satisfied/dissatisfied
- ■ Don't know
- ■ Fairly satisfied
- ■ Very satisfied

*Fieldwork for this project was carried out in March 2021*

7.4. How satisfied you were with the following?
7.5. And how was your experience with the following compared to what you were expecting?
Base: All respondents with experience during the pandemic but not recent users n = 1,115

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# Overall journey satisfaction for multiple TOC users

**It seems that if more than two TOCs are used for a rail journey, overall satisfaction decreases more considerably; however, this might not be down to the TOC but due to increased waiting time and changing of trains. Single TOC journeys has equal satisfaction to 2 TOCs as bad experiences on one TOC may be offset by good experiences on the other**

## Overall (%)

- Satisfied: 80
- Neither nor: 12
- Dissatisfied: 8
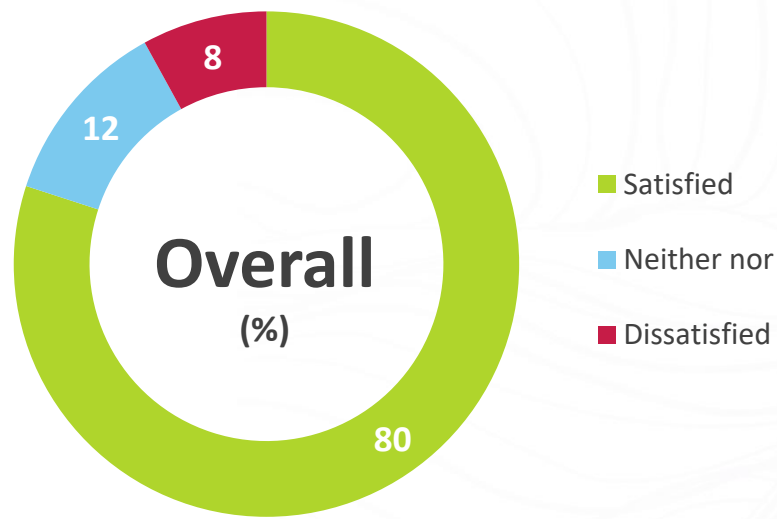
Generally small split by user type but fewer commuters were dissatisfied. Those on more than two TOC journeys were significantly less satisfied with their overall journey than those with two or one

## Journey purpose (%)

**Commuters**
- Satisfied: 81
- Neither nor: 14
- Dissatisfied: 4

**Business**
- Satisfied: 80
- Neither nor: 8
- Dissatisfied: 12

**Non-work**
- Satisfied: 78
- Neither nor: 11
- Dissatisfied: 11

■ Satisfied  ■ Neither nor  ■ Dissatisfied

## No. of TOCs used (%)

**1\***
- Satisfied: 82
- Neither nor: 9
- Dissatisfied: 9

**2**
- Satisfied: 82
- Neither nor: 13
- Dissatisfied: 5

**3+**
- Satisfied: 74
- Neither nor: 12
- Dissatisfied: 14
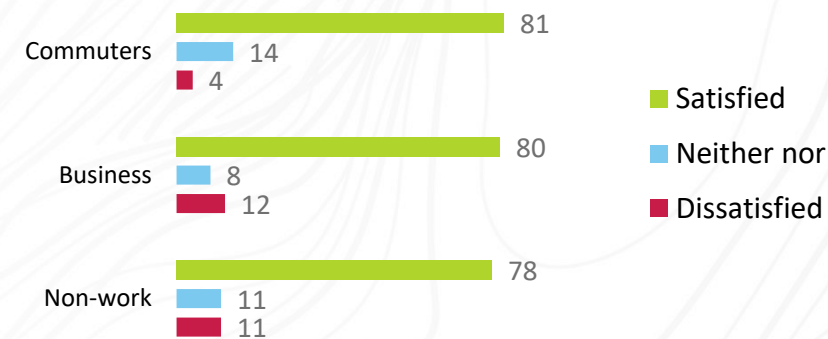
■ Satisfied  ■ Neither nor  ■ Dissatisfied
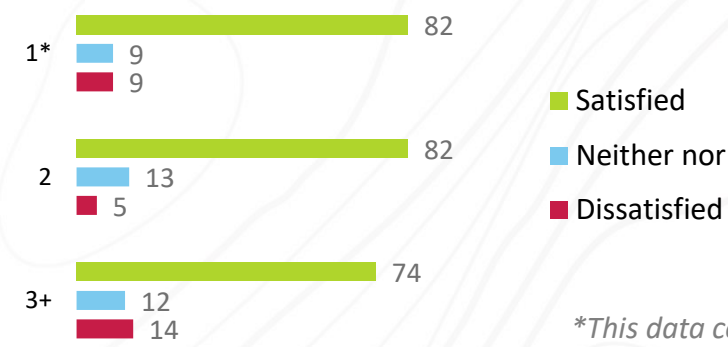
*This data comes from a different question: Q4.7*

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# Passenger behaviour causing concern

**Concern about other passenger behaviour is primarily Covid related, much more so on the train than at the station; this seems to call for stricter reinforcement of the rules**

## Overall (%)

- 19 — Yes, at the station
- 19 — Yes, on the train
- 67 — No

## Top 5 concerns at the station (%)

| Concern | % |
|---|---|
| Passengers near me not wearing a face covering/properly | 38 |
| Passengers not keeping a social distance from me | 35 |
| Not being considerate when getting on/off | 33 |
| Feet on seats | 26 |
| Music being played loudly | 21 |

## Top 5 concerns on the train (%)

| Concern | % |
|---|---|
| Passengers near me not wearing a face covering/properly | 68 |
| Passengers not keeping a social distance from me | 48 |
| Not being considerate when getting on/off | 42 |
| Feet on seats | 35 |
| Music being played loudly | 24 |

*Fieldwork for this project was carried out in March 2021*

5.4 Did other passengers' behaviour give you cause to worry or make you feel uncomfortable during your most recent journey?
Q. Which of the following were reason(s) for this?
Base: All recent users n= 5,771. Users with concerns at the station n=807, Users with concerns on the train n= 997.

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# A view to the future – what will train travel look like in the coming months?

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# Looking ahead – Expectations of what the future holds

## Future train usage

**35%**

will definitely use the train again after the pandemic

**15%**

will definitely not use the train again after the pandemic

*Base: All respondents including rejecters\*\**

## Future travel frequency

When passengers' preferred scenario is in place\*:
- More **people** are likely to travel by train
- There will be fewer **journeys** made
- Leisure likely to increase as commuting decreases
- The strongest individual driver is that train operators have Covid measures in place

*Base: Non recent users*

## Future commute to work

**15%**

will not be working post pandemic – compared to 14% before, so the level of employment is expected to be the same

**44%**

will only work at workplace/study at place of education, down from 52% before pandemic

*Base: Pre-Covid commuters*

## Future use of public transport

**62%**

expect to use public transport as much as before the pandemic

**15%**

expect to use it less

**23%**

are undecided

*Base: All respondents*

## Comfort level for using the train

**52%**

feel uncomfortable using the train at present

**17%**

feel uncomfortable using the train in the future when contracting Covid-19 is very small

*Base: Lapsed and non-users*

*\*See slide 77      \*\*This question was nationally representative and includes 'Train Rejectors'. Refer to slide 16. 'Train rejectors' were then excluded from the rest of the survey*

*Fieldwork for this project was carried out in March 2021*

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# How soon are people expecting to return to … /1

**Recent users are at the forefront of resuming activities as soon as they can (or have done so already), with a greater lag-time particularly for fully lapsed users who also need greater reassurance. Data reflective of March 2021**

Legend: ■ Recent Users ■ Non-recent Users ■ Fully Lapsed Users ■ Non-Users
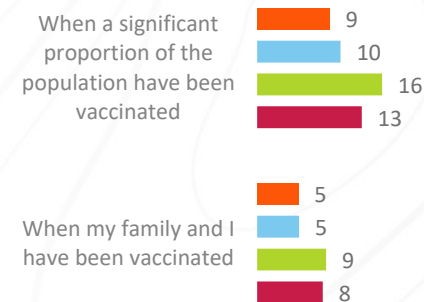
## Shopping centre
| | |
|---|---|
| As soon as they open | 40 / 32 / 21 / 23 |
| A week or two after they open | 24 / 27 / 20 / 20 |
| A month or two after they open | 13 / 14 / 19 / 14 |
| Don't think I will go back at all | 1 / 1 / 2 / 2 |

## Pub
| | |
|---|---|
| As soon as they open | 36 / 23 / 17 / 15 |
| A week or two after they open | 17 / 19 / 15 / 12 |
| A month or two after they open | 13 / 16 / 16 / 13 |
| Don't think I will go back at all | 2 / 1 / 2 / 3 |

## Restaurant
| | |
|---|---|
| As soon as they open | 39 / 27 / 19 / 17 |
| A week or two after they open | 22 / 24 / 16 / 16 |
| A month or two after they open | 16 / 21 / 22 / 19 |
| Don't think I will go back at all | 1 / 0 / 1 / 2 |

## Gym
| | |
|---|---|
| As soon as they open | 23 / 16 / 8 / 9 |
| A week or two after they open | 7 / 7 / 5 / 4 |
| A month or two after they open | 6 / 7 / 6 / 3 |
| Don't think I will go back at all | 4 / 2 / 6 / 5 |

## Cinema or thetre
| | |
|---|---|
| As soon as they open | 22 / 17 / 10 / 9 |
| A week or two after they open | 14 / 11 / 9 / 6 |
| A month or two after they open | 20 / 21 / 15 / 13 |
| Don't think I will go back at all | 2 / 2 / 4 / 5 |

## Indoor leisure attraction e.g. Museum / bowling
| | |
|---|---|
| As soon as they open | 25 / 17 / 10 / 9 |
| A week or two after they open | 16 / 12 / 10 / 7 |
| A month or two after they open | 20 / 23 / 20 / 16 |
| Don't think I will go back at all | 1 / 1 / 2 / 2 |

## Outdoor leisure attraction such as theme park or seaside
| | |
|---|---|
| As soon as they open | 32 / 25 / 18 / 22 |
| A week or two after they open | 14 / 16 / 10 / 11 |
| A month or two after they open | 19 / 20 / 21 / 18 |
| Don't think I will go back at all | 1 / 1 / 1 / 2 |

*Fieldwork for this project was carried out in March 2021*

D3.3 How soon do you expect to return to the following places? Base: All answering n = 4,607

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**Vaccination plays less of a role for returning to activities for recent and non-recent users; it seems to be more important for fully lapsed users. Data reflective of March 2021**

🟧 Recent Users    🟦 Non-recent Users    🟩 Fully Lapsed Users    🟥 Non-Users

## Shopping centre

When a significant proportion of the population have been vaccinated
- Recent Users: 6
- Non-recent Users: 8
- Fully Lapsed Users: 14
- Non-Users: 13

When my family and I have been vaccinated
- Recent Users: 3
- Non-recent Users: 4
- Fully Lapsed Users: 6
- Non-Users: 7

## Pub

When a significant proportion of the population have been vaccinated
- Recent Users: 6
- Non-recent Users: 8
- Fully Lapsed Users: 12
- Non-Users: 10

When my family and I have been vaccinated
- Recent Users: 4
- Non-recent Users: 5
- Fully Lapsed Users: 6
- Non-Users: 6

## Restaurant

When a significant proportion of the population have been vaccinated
- Recent Users: 6
- Non-recent Users: 6
- Fully Lapsed Users: 13
- Non-Users: 12

When my family and I have been vaccinated
- Recent Users: 5
- Non-recent Users: 5
- Fully Lapsed Users: 8
- Non-Users: 8

## Gym

When a significant proportion of the population have been vaccinated
- Recent Users: 3
- Non-recent Users: 5
- Fully Lapsed Users: 5
- Non-Users: 3

When my family and I have been vaccinated
- Recent Users: 2
- Non-recent Users: 3
- Fully Lapsed Users: 3
- Non-Users: 2

## Cinema or thetre

When a significant proportion of the population have been vaccinated
- Recent Users: 9
- Non-recent Users: 11
- Fully Lapsed Users: 14
- Non-Users: 11

When my family and I have been vaccinated
- Recent Users: 5
- Non-recent Users: 5
- Fully Lapsed Users: 8
- Non-Users: 8

## Indoor leisure attraction e.g. Museum / bowling

When a significant proportion of the population have been vaccinated
- Recent Users: 9
- Non-recent Users: 10
- Fully Lapsed Users: 16
- Non-Users: 13

When my family and I have been vaccinated
- Recent Users: 5
- Non-recent Users: 5
- Fully Lapsed Users: 9
- Non-Users: 8

## Outdoor leisure attraction such as theme park or seaside

When a significant proportion of the population have been vaccinated
- Recent Users: 8
- Non-recent Users: 9
- Fully Lapsed Users: 14
- Non-Users: 13

When my family and I have been vaccinated
- Recent Users: 4
- Non-recent Users: 4
- Fully Lapsed Users: 8
- Non-Users: 8

*Fieldwork for this project was carried out in March 2021*

D3.3 How soon do you expect to return to the following places? Base: All answering n = 4,607

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# Future of the working environment

**Some will be travelling fewer days a week for work but it seems that there is confidence that employment will return to previous levels**



■ Train usage data    ■ Bus usage data

**Only work/ study from home**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Bus | 20 | 32 | 19 |
| Train | 7 | 25 | 7 |

**Work/ study 4 days a week from home**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Bus | 6 | 9 | 8 |
| Train | 6 | 8 | 7 |

**Work/ study 3 days a week from home**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Bus | 7 | 9 | 10 |
| Train | 4 | 6 | 9 |

**Work/ study 2 days a week from home**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Bus | 5 | 6 | 7 |
| Train | 4 | 5 | 8 |

**Work/ study 1 days a week from home**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Bus | 5 | 3 | 4 |
| Train | 4 | 3 | 5 |

**Work/ study from home less often than one day a week**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| | 8 | 4 | 4 |
| | 8 | 4 | 4 |

**Only work at workplace/ study at place of education**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Train | 52 | 28 | 44 |
| Bus | 48 | 26 | 34 |

**Not working/ studying**

| | Before lockdown | Currently | Post lockdown |
|---|---|---|---|
| Train | 14 | 20 | 15 |
| Bus | | 10 | 5 |

D4 Can you please let us know how often you worked/ studied from home before the pandemic, how this has changed since then, and what you expect in the future? Base: Previous commuters n = 8,538

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# Qual context – Future rail usage: what can be expected?

**It seems few will shift to other modes and while some commuters will travel less, leisure journeys will compensate for that to some extent and there is an opportunity to attract new users**

*"I believe my train travel will increase to pre-pandemic levels due to wanting to make the most of being out of lockdown and it will give me the motivation to do more things in London that I wouldn't have done pre-pandemic. Pre-pandemic I wouldn't usually go into London as much, but I feel that I will be using trains much more after restrictions are eased, due to making up for lost time."*

**Recent user – Leisure perspective**

*"I will prefer not to commute to work unless I have to, and maybe spend more time working from home as much as I can, maybe 2 days in the office and 3 days working from home."*

**Recent user – Commuter perspective**

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# Introduction to the scenario testing

**The IRPS questionnaire included a scenario building exercise for each non-recent user (not travelled in the past three months) to understand what they wanted in order to use the train again**

The scenarios took into account not only what the train operators could be doing but also other aspects such as whether travel restrictions are in place, places are open (e.g. place of work, visitor attraction, etc.) and the vaccination rollout...

**Each respondent had to indicate what they needed for the following:**

- Measures taken by TOCs to mitigate Covid-19 (actions taken by train operators)

- How open the society is and what are the rules on meeting people again (restrictions and how safe people feel)

- Vaccination rollout progress (status of vaccination roll out)

Then each respondent was asked a few questions based on their scenario to give greater context:

- How frequently they would travel

- What would be the main purpose of the journey

- The expected Covid-19 situation

- Whether they would travel out of choice

**Results:**

Based on respondents' ideal scenario for using the train again, we calculated the **propensity to travel** in each of 4,096 different scenarios.

On top of that, we were able to identify, using a Key Driver Analysis, which elements of the scenarios where more important for passengers to use the train again.

Scenarios were very Covid focused which would have impacted results. In this section, we selected 2 scenarios which we felt were both realistic outcomes yet quite different. In this way, we can compare the propensity to travel in both and the impact of this.



*Fieldwork for this project was carried out in March 2021*

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# Key Driver Analysis – how the individual components drive propensity to use the train

**Train operators having Covid-safety measures in place is the strongest driver to stimulate train usage. But for that to be effective passengers also <u>need to be aware</u> that the measures are in place. Enforcement of measures also contributes notably to usage uptake. When looking at combined importance, actions taken by TOCs does carry more importance in driving propensity to use the train than the experience of being out and about in public places**

### Combined importance – factors under operator control
### 46.6

- **31** Train operators have Covid-safety measures in place
- **12.9** There is rigorous enforcement in place
- **2** Train operators provide plenty of additional Covid safety information
- **0.6** There is a financial incentive

### Combined importance – general factors outside operator control
### 35.6

- **13.8** I can visit friends and family again
- **8** I personally feel safer
- **7.1** Places are open with: no Covid restrictions
- **3.9** Places are open with: reduced Covid restrictions
- **1** Rules on social distancing and face coverings are lifted everywhere
- **-1.7** Places are open with: strict Covid restrictions*

### Combined importance – vaccine factors outside operator control
### 17.9

- **9.7** Only once I have been vaccinated
- **5** Only once all adults have been vaccinated
- **3.2** Only once the most at-risk groups have been vaccinated

Note: Scenarios not asked of recent users
*Places being open with strict Covid restrictions actually has a negative impact on propensity to travel (hence the negative figure)

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# Example scenario 1 – Focusing on enforcement and reduced Covid restrictions

**29% of non-recent users would return to train travel in this scenario. Of these, more than 4 in 5 would return to using the train as much or more than pre pandemic, and most of these would be leisure journeys as indicated by the predicted journey purpose.**

These items are in place:

- Train operators have Covid-safety measures in place
- There is rigorous enforcement in place
- Places are open with reduced Covid restrictions
- I can visit friends and family again
- I personally feel safer
- Only once all adults have been vaccinated

**Propensity to travel in this scenario** **29%**

Note: Scenarios not asked of recent users

*Fieldwork for this project was carried out in March 2021*

## Of the 29%:

With Covid still around, when do you expect to travel by train again assuming there is no advice from the government against train travel? (%)

| | |
|---|---|
| When I have a reason to, even if COVID is still an issue | 55 |
| Once COVID is a reduced risk | 24 |
| Only once COVID is no longer a risk | 21 |

Based on your best estimate, do you think you will travel in this context more, less or about the same than before the pandemic? (%)

| About the same | Less often | More often |
|---|---|---|
| 48 | 18 | 35 |

And in this scenario, what would be the main purpose of that journey? (%)

| | |
|---|---|
| A day out | 26 |
| Visiting friends or relatives | 26 |
| Other leisure trip | 9 |
| Daily commuting to/ from work or education | 8 |
| Shopping trip | 8 |
| Travel to/ from holiday | 8 |
| On personal business (job interview, dentist, etc.) | 6 |
| Less regular commuting to/ from work or education | 4 |
| On company business (or own if self-employed) | 3 |
| Sport | 2 |

11.2 With Covid still around, when do you expect to travel by train again assuming there is no advice from the government against train travel?; 11.8 Based on your best estimate, do you think you will travel in this context more, less or about the same than before the pandemic?; 11.6 And in this scenario, what would be the main purpose of that journey? Base: All future train users answering n = 3,343

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# Example scenario 2 – Focusing on financial incentives and no Covid restrictions

**In this scenario, 21% of non-recent users will return to train travel; although the proportion of these using it more than before the pandemic is higher than the previous scenario. In this context there would be a slightly greater uptake for commuting.**

These are in place:

- Train operators have Covid-safety measures in place

- Train operators provide plenty of additional Covid safety information

- There is a financial incentive

- Places are open with no Covid restrictions

- Rules on social distancing and face coverings are lifted everywhere

- Only once I have been vaccinated

- Only once the most at-risk groups have been vaccinated

**Propensity to travel in this scenario** **21%**

Note: Scenarios not asked of recent users

*Fieldwork for this project was carried out in March 2021*

## Of the 21%:

With Covid still around, when do you expect to travel by train again assuming there is no advice from the government against train travel? (%)

| | |
|---|---|
| When I have a reason to, even if COVID is still an issue | 54 |
| Once COVID is a reduced risk | 29 |
| Only once COVID is no longer a risk | 16 |

Based on your best estimate, do you think you will travel in this context more, less or about the same than before the pandemic? (%)

| About the same | Less often | More often |
|---|---|---|
| 42 | 18 | 40 |

And in this scenario, what would be the main purpose of that journey? (%)

| | |
|---|---|
| A day out | 26 |
| Visiting friends or relatives | 15 |
| Daily commuting to/ from work or education | 13 |
| Shopping trip | 9 |
| Travel to/ from holiday | 8 |
| On personal business (job interview, dentist, etc.) | 7 |
| Other leisure trip | 6 |
| Less regular commuting to/ from work or education | 6 |
| On company business (or own if self-employed) | 6 |
| Sport | 2 |

11.2 With Covid still around, when do you expect to travel by train again assuming there is no advice from the government against train travel?; 11.8 Based on your best estimate, do you think you will travel in this context more, less or about the same than before the pandemic?; 11.6 And in this scenario, what would be the main purpose of that journey? Base: All future train users answering n = 3,343

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# Some pointers for successful communications

*The following slides summarise some key findings from the qualitative work which was conducted alongside the IRPS. More detail on how passengers engage with communications about Covid is given in the full qualitative report.*

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# Communication – what makes a campaign more successful

**Key areas to get right:**

**Content**

✓ Informative (factual) campaigns are better at reassurance although are less likely to entice passengers back to trains

✓ 'Different' messages were more impactful. EG. Ventilation rather than wearing face coverings

✓ Emotional campaigns are better at encouragement, create excitement and will decrease lead times. They also stand out more

✓ Overall, a mixture appears to be the best approach. Appealing to the emotions excites passengers but many also need the reassurance

**Key areas to get right:**

**Tone, style**

✓ A mixture of tones is recommended. Firm messaging at stations. Softer messaging preferred online. Soft is less impactful for those who had already made the decision to travel

✓ Needs to be **Simple, realistic and concise**

✓ Strong preference for images and icons across all comms including posters at stations, website pages, video ads etc.

✓ Too much text is off-putting. Videos in general were well liked and could be leveraged more, especially on social media and websites

*Fieldwork for this project was carried out in March 2021*

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# Communication – how best to reach people

## Where?

! Certain messages and campaigns work better on certain channels

! Websites are a source of information but must be laid out clearly with the most important information easily available at the top

! Social media and apps are critical; especially for commuters. They build trust with frequent, accurate, live information provision

! Tannoy announcements and station posters are effective at delivering quick impactful messages

## When?

! Up-to-date information is essential, especially as restrictions ease. Passengers want clear messaging about the rules on the trains and also the network

! Investing in pre-travel information is critical. There are deep concerns about busy trains and a strong desire to avoid this. TOCs need to provide live journey tracking information with in depth capacity checking capability

! Make this known to passengers now. Informative campaigns provide reassurance and build trust

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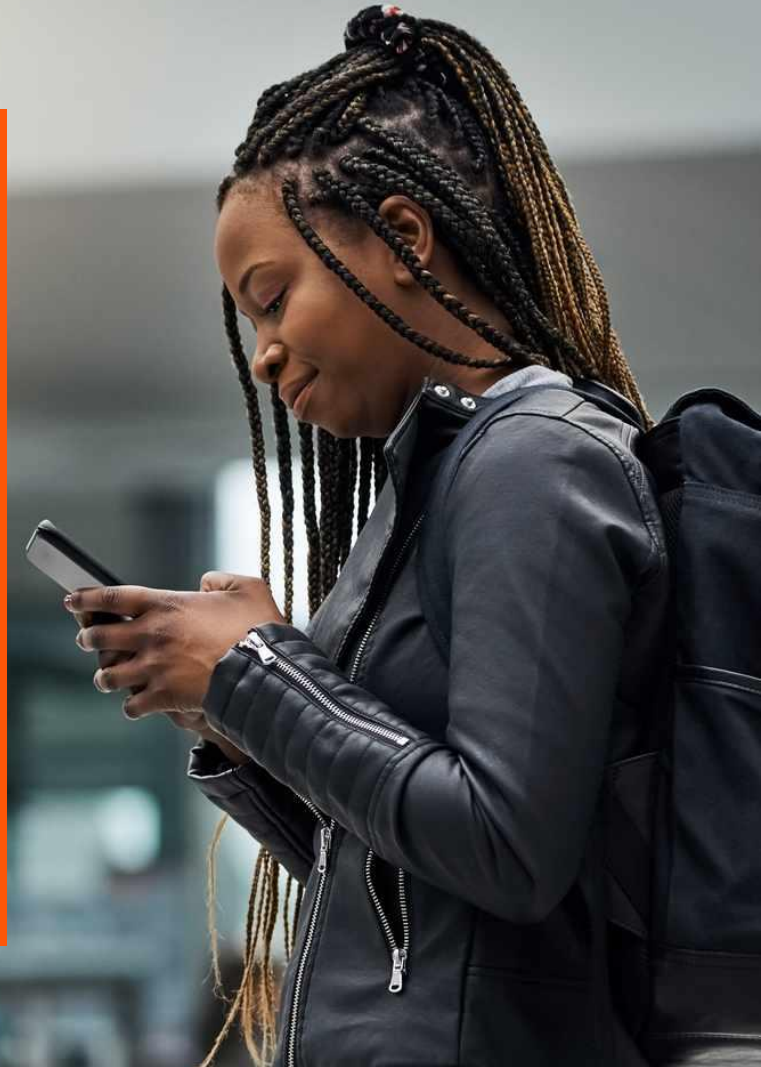
*"Let us know what you're doing, it seems like you're doing things but it's not clear what you're doing to make things safer."*

**Lapsed user**

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# Qual context – Action planning for the industry: need for a step change

**We highlight 4 key areas to be worked on <u>now</u> in order to improve experience and affect this step change, underpinned by a longer term area**

## Cleanliness

- The cleanliness efforts have been well received and must be maintained. Particularly important for lapsed and vulnerable users who have no experience of the trains during the pandemic.

- More visible cleaning would be welcomed by all passengers.

- Passengers also want a contactless experience (ticketing, doors etc.) as well as more hand sanitiser stations available on platforms and on trains.

## Crowd mitigation

- Overcrowding is the biggest concern for recent users looking ahead to the future. Some popular solutions were more trains, longer trains, pre-travel capacity checker capability, platform and train management controls.

- Effective communication about what is being done is vital. Overcrowding will be virtually impossible to stop and TOCs need to demonstrate that they are doing what they can to build trust.

## Information provision

- Passengers must have all the information they need and the ability to amend plans if necessary.

- The most popular ideas being improved apps, capacity checkers with very up-to-date information and more staff advising passengers at stations.

- There needs to be clear and consistent information provided on railway-wide organisations such as Trainline.com and via TOC channels.

## Managing social distancing and face coverings

- Staff presence reassures passengers.

- Most passengers want to see face coverings and social distancing continued.

- Staff must set a good example for social distancing and wearing face coverings.

- Staff having greater powers to enforce the regulations.

- Clear rules and campaigns for those who are exempt from face coverings.

## Sector investment

- Visible investment is seen as a must by passengers, especially commuters, moving forwards. Passengers want to see newer train stock which is cleaner and greener, station improvements and more staff.

- Improving value for money is important to passengers. Absolute costs are seen as too high and so offers such as carnets or flexi tickets will entice them back to trains. Short term financial incentives are also believed to stimulate demand but must be implemented carefully so as not to create a rush of demand back onto the network.

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# Appendix

1. Demographics

2. Key drivers Analysis

# Demographics

## Overall figures

🟧 Train usage data  🟦 Bus usage data

### Gender

48  48  52  50

### Age

| 16-24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 + |
|---|---|---|---|---|
| 13  17 | 17  16 | 15  15 | 16  15 | 38  36 |

### Disability

| Yes: Vision (e.g. blindness or partial sight) | Yes: Hearing (e.g. deafness or partial hearing) | Yes: Mobility or Dexterity | Yes: Mental health |
|---|---|---|---|
| 3  3 | 4  5 | 12  12 | 15  15 |

## Region

Scotland — 8 / 9

North East — 4 / 4

North West — 11 / 11

Yorkshire and the Humber — 8 / 9

West Midlands — 9 / 7

East Midlands — 7 / 9

Wales — 5 / 5

East of England — 10 / 9

South West — 9 / 14

London — 14 / 10

South East — 14 / 13

## Social grade

DE 24   AB 27
C2 20   C1 28

DE 60   AB 14
C1 17
C2 11

## Face covering exemption

89 — Not exempt

7 — Exempt

*Not asked in bus survey*

*Fieldwork for this project was carried out in March 2021*

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# Results of the key driver analysis on <u>overall journey satisfaction</u> excl. train experience

**Excluding the metric of satisfaction with the experience on the train but including those that make up on board experience, shows that the most dominant driver is how well a delay was dealt with. The top four drivers are all largely within the control of the train operator**

### Key drivers of overall journey satisfaction (all adding to 100)

| Driver | Value |
|---|---|
| How well the train company dealt with this delay | 14.0 |
| Cleanliness inside the train | 9.5 |
| Comfort of seats | 8.9 |
| How well the train company looked after passengers in terms of COVID-… | 8.1 |
| Punctuality/ reliability of the train (i.e. that the train arrived and… | 6.9 |
| Value for money for the price you paid for this most recent journey | 6.7 |
| Sufficient ventilation on board the train | 6.5 |
| Toilet facilities on board | 6.1 |
| Passengers keeping a social distance on board and when getting on and off | 5.9 |
| Sufficient room for all the passengers to sit / stand comfortably | 5.9 |
| Length of time the journey was scheduled to take | 5.7 |
| Frequency of the trains on that route | 5.6 |
| Information provision during the journey | 5.1 |
| Passengers wearing face coverings (properly) on board | 5.1 |

*Fieldwork for this project was carried out in March 2021*

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# Appendix

**3. Snapshot summary of passenger experience in early 2021, by Train Operating Company**

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**AVANTI WEST COAST**

## Avanti West Coast

Long Distance

**85%**
Overall satisfaction with most recent journey

**+1**
Comparison to sector average

Sample size: 404

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **51%** | **29%** | **20%** |

*Gender*: **55%** **45%**

*Time of day:*

| Peak* | **41%** |
| Off-peak | **53%** |
| Weekend | **7%** |

*Journey purpose*:

| Commuter | **10%** |
| Business | **21%** |
| Leisure | **69%** |

## Satisfaction with...

**75%** Punctuality

**84%** Sufficient room

**79%** Covid safety

**79%** Cleanliness
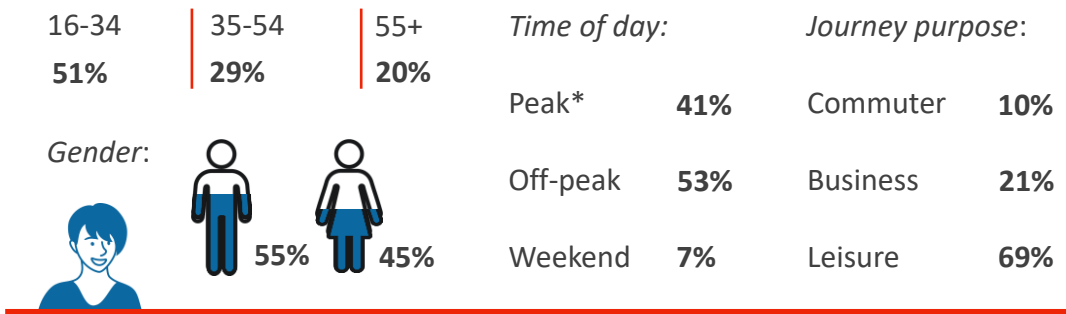
- Overall, Avanti performed on par with other Long Distance operators

- Avanti performs well on overall train experience and perceptions of sufficient room for passengers on board, and is top in this sector for Covid safety

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**crosscountry**
by arriva

## CrossCountry

Long Distance

**80**% Overall satisfaction with most recent journey

😐 **-4** Comparison to sector average

**Sample size: 433**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **51%** | **40%** | **9%** |

*Gender*: **57%** **43%**

*Time of day:*

| Peak* | **38%** |
|-------|---------|
| Off-peak | **57%** |
| Weekend | **5%** |

*Journey purpose*:

| Commuter | **15%** |
|----------|---------|
| Business | **26%** |
| Leisure | **59%** |

## Satisfaction with...

**83**% Punctuality

**76**% Sufficient room

**79**% Covid safety

**84**% Cleanliness

- CrossCountry is rated a little lower than other Long Distance operators for overall journey satisfaction – though the sector as a whole did perform well, with 80% or more passengers saying they were very or fairly satisfied

- The TOC receives lower satisfaction scores on value for money and perceptions of sufficient room, than most other TOCs in this sector

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**EMR**

## East Midlands Railway

Long Distance

**88%**
Overall satisfaction with most recent journey

**+4**
Comparison to sector average

### Sample size: 248

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **41%** | **37%** | **22%** |

*Gender*:  **57%**  **43%**

| Time of day: | | Journey purpose: | |
|---|---|---|---|
| Peak* | **51%** | Commuter | **23%** |
| Off-peak | **45%** | Business | **27%** |
| Weekend | **4%** | Leisure | **50%** |

## Satisfaction with...

**83%** Punctuality

**76%** Sufficient room

**74%** Covid safety

**73%** Cleanliness

- EMR was rated highly by passengers for overall journey satisfaction, and the highest of all the Long Distance operators

- Punctuality, sufficient room and experience on the train were its top metrics

- Perceived cleanliness and perceptions of looking after passengers were not as strong as for other Long Distance operators, however

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**LNER**
LONDON NORTH EASTERN RAILWAY

## London North Eastern Railway

Long Distance

**84%** Overall satisfaction with most recent journey

**+0** Comparison to sector average

Sample size: 295

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| 40% | 34% | 26% |

*Gender*: 63% 37%

*Time of day:*
| Peak* | 44% |
| Off-peak | 48% |
| Weekend | 7% |

*Journey purpose*:
| Commuter | 9% |
| Business | 30% |
| Leisure | 61% |

## Satisfaction with...

**84%** Punctuality

**82%** Sufficient room

**77%** Covid safety

**83%** Cleanliness

- LNER performed on average with the Long Distance sector

- In particular, it received the highest satisfaction ratings from passengers, in this sector, for their overall experience on the train

- Perceived value for money and Covid safety were two of the lower scoring metrics

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys.  *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**TRANSPENNINE EXPRESS**

## TransPennine Express

Long Distance

**87**% Overall satisfaction with most recent journey

**+3** Comparison to sector average

**Sample size: 244**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| 45%   | 41%   | 14% |

*Gender:* 70% 30%

*Time of day:*

| Peak*    | 42% |
|----------|-----|
| Off-peak | 46% |
| Weekend  | 12% |

*Journey purpose:*

| Commuter | 29% |
|----------|-----|
| Business | 12% |
| Leisure  | 60% |

## Satisfaction with...

**87**% Punctuality

**93**% Sufficient room

**79**% Covid safety

**84**% Cleanliness

- TransPennine Express performed well, with one of the highest levels of journey satisfaction overall

- Passengers rated it particularly well on important aspects of their journeys: punctuality and perceptions of having sufficient room on board. They were also satisfied with cleanliness.

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**Merseyrail**

## Merseyrail

Regional

**85**% Overall satisfaction with most recent journey

😐 **+2** Comparison to sector average

**Sample size: 176**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **42%** | **34%** | **24%** |

*Gender*: 👨 **59%** 👩 **41%**

*Time of day:*
Peak* **40%**
Off-peak **53%**
Weekend **7%**

*Journey purpose*:
Commuter **56%**
Business **1%**
Leisure **44%**

## Satisfaction with...

**88**% Punctuality

**87**% Sufficient room

**73**% Covid safety

**77**% Cleanliness

- A high proportion of passengers were satisfied with their journeys overall on Merseyrail, at a similar level to other Regional sector operators.

- In particular, Merseyrail performed well on important journey aspects: passengers' perceptions of having sufficient room on board, and punctuality

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys.  *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transport**focus**

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

NORTHERN

## Northern

Regional

**80%** Overall satisfaction with most recent journey

**-3** Comparison to sector average

### Satisfaction with...

**78%** Punctuality

**83%** Sufficient room

**71%** Covid safety

**74%** Cleanliness

Sample size: 739

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| 42% | 40% | 18% |

Gender: 59% 40%

**Time of day:**

| Peak* | 37% |
|-------|-----|
| Off-peak | 57% |
| Weekend | 5% |

**Journey purpose:**

| Commuter | 43% |
|----------|-----|
| Business | 8% |
| Leisure | 49% |

- Northern had the lowest level of overall journey satisfaction in the Regional sector – though all performed fairly well and Northern journeys were still satisfactory for 80%

- Northern received below average scores for experience on the train, including for perceptions of cleanliness

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

## ScotRail

Regional

**87**% Overall satisfaction with most recent journey

**+4** Comparison to sector average

Sample size: 383

| 16-34 | 35-54 | 55+ |
|---|---|---|
| **31%** | **52%** | **17%** |

*Gender:*  **62%**  **37%**

| *Time of day:* | | *Journey purpose:* | |
|---|---|---|---|
| Peak* | **33%** | Commuter | **34%** |
| Off-peak | **61%** | Business | **13%** |
| Weekend | **5%** | Leisure | **53%** |

## Satisfaction with...

**83**% Punctuality

**87**% Sufficient room

**74**% Covid safety

**72**% Cleanliness

- ScotRail had the highest level of overall journey satisfaction for operators in the Regional sector

- It performed particularly well for perceptions of punctuality and having sufficient room on board

- Cleanliness and frequency of trains received weaker scores

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**TRAFNIDIAETH CYMRU**
**TRANSPORT FOR WALES**

## Transport for Wales

Regional

**86%**
Overall satisfaction with most recent journey

**+3**
Comparison to sector average

Sample size: 296

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **64%** | **24%** | **12%** |

*Gender*: **61%** **39%**

| Time of day: | | Journey purpose: | |
|-----------|------|-----------|------|
| Peak* | **48%** | Commuter | **29%** |
| Off-peak | **48%** | Business | **11%** |
| Weekend | **4%** | Leisure | **60%** |

## Satisfaction with...

**81%** Punctuality

**78%** Sufficient room

**76%** Covid safety

**68%** Cleanliness

- Transport for Wales performed similarly to the average for Regional operators for overall journey satisfaction

- Underneath this overall journey satisfaction, it performed fairly well compared to other TOCs on passengers' perceptions of being looked after in terms of Covid safety. However perceived cleanliness on board in particular was relatively low.

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transportfocus

# Snapshot summary of passenger experience, early 2021

## Results from Interim Rail Passenger Survey

**c2c**

### c2c

London & SE

**76**% Overall satisfaction with most recent journey

**-5** Comparison to sector average

Sample size: 224

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| 44% | 42% | 15% |

Gender: 65% 35%

| Time of day: | | Journey purpose: | |
|--------------|-----|------------------|-----|
| Peak* | 45% | Commuter | 63% |
| Off-peak | 50% | Business | 7% |
| Weekend | 5% | Leisure | 30% |

### Satisfaction with...

**76%** Punctuality

**69**% Sufficient room

**61**% Covid safety

**61**% Cleanliness

C2c was one of the lowest performing TOCs for overall journey satisfaction (crowding issues at some stations, especially early on in the pandemic, may have been partly the cause of this)

Perceptions of how well passengers were looked after in terms of Covid safety, and cleanliness, were especially low

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**Chilternrailways** by arriva

## Chiltern Railway

London & SE

**95%**
Overall satisfaction with most recent journey

**+14**
Comparison to sector average

Sample size: 145

| 16-34 | 35-54 | 55+ |
|---|---|---|
| **46%** | **39%** | **15%** |

*Gender*:  **60%**  **39%**

| *Time of day:* | | *Journey purpose*: | |
|---|---|---|---|
| Peak* | **55%** | Commuter | **41%** |
| Off-peak | **39%** | Business | **24%** |
| Weekend | **4%** | Leisure | **36%** |

### Satisfaction with...

**85%** Punctuality

**73%** Sufficient room

**75%** Covid safety

**70%** Cleanliness

- Chiltern Railways saw the highest level of overall journey satisfaction, of all TOCs, during this study
- This looks to have been driven by positive perceptions of punctuality – the strongest among all London & South East operators – and relatively good perceptions of value for money
- Nevertheless, Chiltern Railways passengers were somewhat less satisfied than for other operators in the sector with perceived sufficient room and cleanliness on the train

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

transport**focus**

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**Great Northern**

## Great Northern

London & SE

**81%**
Overall satisfaction with most recent journey

😐 **+0**
Comparison to sector average

**Sample size: 264**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| 54% | 30% | 15% |

*Gender*: 50% 50%

| *Time of day:* | | *Journey purpose*: | |
|------------|-----|-----------------|-----|
| Peak* | 46% | Commuter | 51% |
| Off-peak | 48% | Business | 10% |
| Weekend | 6% | Leisure | 39% |

## Satisfaction with...

**73%** Punctuality

**84%** Sufficient room

**65%** Covid safety

**73%** Cleanliness

- Great Northern performed similarly to the average for London & South East operators for overall journey satisfaction

- Underneath this: passengers typically had positive perceptions of having sufficient room on board, but perceived punctuality was less strong, and a relatively low proportion of passengers felt that Great Northern looked after passengers well in terms of Covid safety

transport**focus**

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**greater**anglia

## Greater Anglia

London & SE

**81**% Overall satisfaction with most recent journey

**+0** Comparison to sector average

Sample size: 433

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **52%** | **37%** | **11%** |

*Gender*: **58%** **41%**

*Time of day:*

| Peak* | **45%** |
|-------|---------|
| Off-peak | **51%** |
| Weekend | **2%** |

*Journey purpose*:

| Commuter | **46%** |
|----------|---------|
| Business | **24%** |
| Leisure | **30%** |

## Satisfaction with...

**80**% Punctuality

**82**% Sufficient room

**75**% Covid safety

**76**% Cleanliness

- Greater Anglia performed similarly to the average for London & South East operators for overall journey satisfaction

- It was among the strongest TOCs in this sector for passengers' perceptions of being looked after well in terms of Covid safety

transport**focus**

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**GWR**

## Great Western Railway

London & SE

**86%** Overall satisfaction with most recent journey

**+5** Comparison to sector average

Sample size: 744

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| 46%   | 41%   | 13% |

Gender: 60% 40%

Time of day:

| Peak* | 40% |
|-------|-----|
| Off-peak | 52% |
| Weekend | 7% |

Journey purpose:

| Commuter | 27% |
|----------|-----|
| Business | 20% |
| Leisure | 52% |

## Satisfaction with...

**81%** Punctuality

**86%** Sufficient room

**76%** Covid safety

**74%** Cleanliness

- GWR had a high score for overall journey satisfaction

- In particular, it performed well for information provision, perceptions of having sufficient room on board and for how passengers felt they were looked after in terms of Covid safety

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**London Northwestern Railway**

London & SE

**79**% Overall satisfaction with most recent journey

**-2** Comparison to sector average

Sample size: 227

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **48%** | **39%** | **14%** |

*Gender*: **64%** **35%**

| Time of day: | | Journey purpose: | |
|--------------|------|------------------|------|
| Peak* | **40%** | Commuter | **43%** |
| Off-peak | **55%** | Business | **18%** |
| Weekend | **4%** | Leisure | **39%** |

**Satisfaction with...**

**82**% Punctuality

**74**% Sufficient room

**72**% Covid safety

**71**% Cleanliness

- London Northwestern Railway was on par with the average for London & South East operators for overall journey satisfaction

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

London Northwestern Railway

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**OVERGROUND**

## London Overground

London & SE

**87%**
Overall satisfaction with most recent journey

**+6**
Comparison to sector average

**Sample size: 707**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **51%** | **38%** | **12%** |

*Gender*: **52%** **48%**

*Time of day:*

| Peak* | **41%** |
|-------|---------|
| Off-peak | **51%** |
| Weekend | **6%** |

*Journey purpose*:

| Commuter | **51%** |
|----------|---------|
| Business | **3%** |
| Leisure | **46%** |

## Satisfaction with...

**82%**
Punctuality

**76%**
Sufficient room

**69%**
Covid safety

**73%**
Cleanliness

- London Overground had a high proportion of passengers who were satisfied overall with their journey

- Journey length, along with fairly positive perceptions of punctuality and overall on board experience look to have driven this

- Perceptions of how passengers were looked after in terms of Covid safety were less strong

transportfocus

# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**southeastern**

## Southeastern

London & SE

**80%** Overall satisfaction with most recent journey

**-1** Comparison to sector average

Sample size: 576

| 16-34 | 35-54 | 55+ |
|---|---|---|
| **39%** | **45%** | **16%** |

*Gender*: **60%** **40%**

| *Time of day:* | | *Journey purpose*: | |
|---|---|---|---|
| Peak* | **44%** | Commuter | **47%** |
| Off-peak | **49%** | Business | **21%** |
| Weekend | **7%** | Leisure | **32%** |

## Satisfaction with...

**77%** Punctuality

**83%** Sufficient room

**67%** Covid safety

**75%** Cleanliness

- Southeastern performed similarly to the average for London & South East operators for overall journey satisfaction

- It was rated relatively well for perceived cleanliness and having enough space on board, in particular

- Value for money perceptions were low, however

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**SOUTHERN**

## Southern

London & SE

**78**% Overall satisfaction with most recent journey

**-3** Comparison to sector average

**Sample size: 576**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **54%** | **33%** | **13%** |

*Gender*:
**56%** **44%**

*Time of day:*

| Peak* | **42%** |
|-------|---------|
| Off-peak | **52%** |
| Weekend | **6%** |

*Journey purpose*:

| Commuter | **48%** |
|----------|---------|
| Business | **9%** |
| Leisure | **43%** |

## Satisfaction with...

**73%** Punctuality

**75**% Sufficient room

**62**% Covid safety

**67**% Cleanliness

- Southeastern performed similarly to the average for London & South East operators for overall journey satisfaction

- Note, however, that only around two thirds of passengers were satisfied with the way they were looked after in terms of Covid safety, and perceptions of cleanliness were among the lowest in the sector

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# Snapshot summary of passenger experience, early 2021

## Results from Interim Rail Passenger Survey

**South Western Railway**

## South Western Railway

### London & SE

**80**% Overall satisfaction with most recent journey

**-1** Comparison to sector average

**Sample size: 590**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **41%** | **37%** | **22%** |

*Gender*: **60%** **40%**

| Time of day: | | Journey purpose: | |
|---|---|---|---|
| Peak* | **42%** | Commuter | **51%** |
| Off-peak | **51%** | Business | **16%** |
| Weekend | **7%** | Leisure | **34%** |

## Satisfaction with...

**76**% Punctuality

**81**% Sufficient room

**72**% Covid safety

**77**% Cleanliness

- South Western Railway performed similarly to the average for London & South East operators for overall journey satisfaction

- It had reasonably positive perceptions for how well passengers were looked after in terms of Covid safety, and was among the stronger TOCs in this sector for perceptions of cleanliness

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**TFL·RAIL**

## TFL Rail

London & SE

**81%**
Overall satisfaction with most recent journey

😐 **+0**
Comparison to sector average

**Sample size: 358**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **58%** | **38%** | **4%** |

*Gender*: 👨 **53%** 👩 **46%**

*Time of day:*

| Peak* | **39%** |
| Off-peak | **57%** |
| Weekend | **3%** |

*Journey purpose*:

| Commuter | **53%** |
| Business | **5%** |
| Leisure | **22%** |

## Satisfaction with...

**82%** Punctuality

**71%** Sufficient room

**68%** Covid safety

**72%** Cleanliness

- TfL Rail Railway performed similarly to the average for London & South East operators for overall journey satisfaction

- In particular TfL passengers had relatively positive perceptions of punctuality during early 2021

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

**ThamesLink/**

## Thameslink

London & SE

**76**% 
Overall satisfaction with most recent journey

**-5** 
Comparison to sector average

**Sample size: 409**

| 16-34 | 35-54 | 55+ |
|-------|-------|-----|
| **49%** | **36%** | **15%** |

*Gender*: **61%** **38%**

| *Time of day:* | | *Journey purpose*: | |
|----------------|------|--------------------|------|
| Peak* | **39%** | Commuter | **52%** |
| Off-peak | **54%** | Business | **10%** |
| Weekend | **5%** | Leisure | **38%** |

## Satisfaction with...

**76%** Punctuality

**81**% Sufficient room

**67**% Covid safety

**77**% Cleanliness

- Three quarters of passengers travelling in early 2021 were satisfied with journeys on ThamesLink, a little lower than most other operators in the London and South East sector

- This is likely to have been driven by perceptions of punctuality, which were not especially strong, along with relatively few passengers feeling satisfied with how well they were looked after in terms of Covid safety

*Key contextual info: Fieldwork: 8/3/21 – 31/3/21. Online survey targeting a nationally representative panel (16+ yo) of 11,479 rail users, lapsed users and non users. Data then weighted, details in a separate document available from Transport Focus. Sample was drawn from online panels (n=8,419) and social media recruitment (n=3,060). Respondents were asked about a journey taken in the last 3 months whereas in the NRPS, they were evaluating a journey they were about to make. Metrics were asked slightly differently in the two surveys. *Morning 'peak' time usually means starting the journey between 7-10am; evening 'peak' time usually means starting the journey between 4-7pm.*

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# Snapshot summary of passenger experience, early 2021

Results from Interim Rail Passenger Survey

West Midlands Railway

## West Midlands Railway
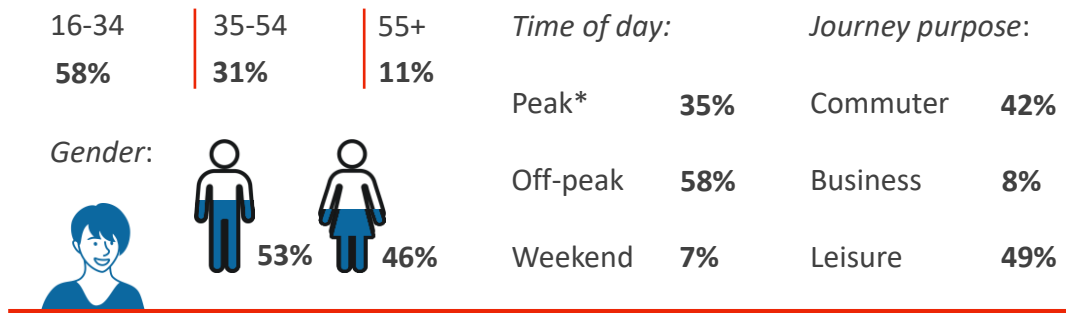
London & SE

**84%**
Overall satisfaction with most recent journey

**+3**
Comparison to sector average

Sample size: 322

| 16-34 | 35-54 | 55+ |
|---|---|---|
| **58%** | **31%** | **11%** |

Gender:
**53%** **46%**

| Time of day: | | Journey purpose: | |
|---|---|---|---|
| Peak* | **35%** | Commuter | **42%** |
| Off-peak | **58%** | Business | **8%** |
| Weekend | **7%** | Leisure | **49%** |

## Satisfaction with...

**77%**
Punctuality

**78%**
Sufficient room

**70%**
Covid safety

**71%**
Cleanliness

- West Midlands Railway had a fairly high proportion of passengers who were satisfied with their journey overall, very slightly above the average for London & South East TOCs

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# Quality & accreditation

**BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.**

- Adherence to the standard is independently audited once per year.

- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001.

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements

*Fieldwork for this project was carried out in March 2021*