

Return to rail: what do passengers want?

Interim rail passenger survey methodology report



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Introduction

Background

Transport Focus represents the interests of transport users across a range of modes, including rail, bus, tram and road. To support this work, Transport Focus runs a number of large scale surveys to measure transport users' satisfaction, and understand their experiences, needs and priorities. A cornerstone of this research has been the National Rail Passenger Survey (NRPS), run every Spring and Autumn between Autumn 1999 and Spring 2020.

The Covid-19 outbreak from early 2020 necessitated a break in the NRPS and other key transport user surveys. This was largely due to a significant reduction in passengers, but also partly because these surveys involved recruiting passengers to take part, in person, as they made their journeys, and this was not possible during periods of restricted movement. The Spring 2020 NRPS fieldwork was curtailed in March 2020 and published based on a reduced sample size, and the survey has not been conducted since (as at summer 2021).

The interim rail passenger survey (IRPS)

Nevertheless, Transport Focus wished to understand the experiences of those passengers who had needed to travel during the pandemic, and to determine rail users' priorities and expectations for a return to rail after Covid.

This will help to inform Transport Focus' input to the planning of rail services going forward. It also provides a read on how well train operators performed during the pandemic from users' perspective, in the absence of a formal NRPS measure.

Additionally, while it has not been possible to conduct the NRPS and other transport user surveys, Transport Focus is undertaking a wide ranging review of the way it conducts this type of experience measurement research, with a view to updating and improving on it in the future. The methodology employed in the IRPS provides learnings which inform this review and future planning for the collection of passenger views.

Summary of the research: quantitative



To measure passenger satisfaction and experiences during the Covid-19 pandemic, including through periods of full lockdown when only essential travel was permitted

Objective

To understand and quantify passenger priorities, and their needs and conditions for returning to rail



8-31 March 2021

Timing



Online survey recruited via panels and promotion on social media



The online survey targeted a nationally representative sample of non-rejecters of rail, among GB residents aged 16+. From this, cohorts of recent users during the pandemic, lapsed users and infrequent / non-users were identified. The recent users sample was also boosted to generate minimum base sizes for each Train Operating Company (TOC). (Some very small TOCs did not have robust enough sample sizes for reporting in their own right; this aligned with low passenger numbers, and reductions in service during the fieldwork period. These were: Heathrow Express, Gatwick Express, Grand Central and Hull Trains). Responses for all groups were weighted, providing a representative overall picture within each of the user cohorts, and overall.

Overall sample size: **11,479** (more detail on the user cohorts is given on page 7).



Summary of the research: qualitative

Phase 1



To hear from passengers in their own words, what it was like to travel during the pandemic, and how they were feeling about returning to rail beyond Covid-19.

To inform the content and language of the quantitative survey questionnaire



12-24 January 2021

Timing



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Sample

Tasks completed via online community platform (more detail on page 39)

In-depth online discussions with individuals

42 non-rejecters of rail, including:

- Recent (pandemic) users, lapsed users and infrequent / non-users.
- Older and vulnerable users
- Non-users

Phase 2

To further enrich the findings from the quantitative survey

To further explore priorities and needs for a return to rail, including with the opportunity for discussion and sharing of ideas between participants

12 March – 6 April 2021

Initial tasks completed via online community platform, followed by in-depth online discussions in groups and with individuals (more detail on page 40)

68 rail non-rejecters, including recent (pandemic) users, and lapsed users

- 12 mini groups (4-5 participants each)
- 7 individual in-depth interviews with disabled passengers
- 7 tasks and in-depth interviews with people reporting on "live" journeys

Quantitative survey in detail

1: The sample



Survey sample: overview

The survey was conducted with four sample cells, with different types of engagement with rail during the pandemic:

All groups were non-rejecters of using trains in the future; all groups were demographically and regionally representative within Great Britain. Recent user sample also included quotas and weighting by TOC and journey factors (see more on weighting, on pages 33-37).

	Recent rail users	Other pandemic rail users	Lapsed rail users	Non / infrequent rail users			
Unweighted sample size	5,979	1,115	1,885	2,500			
Definition	Travelled by train during Dec 2020 – Mar 2021 May or may not have used train pre-pandemic (These respondents told us about 8,961 journeys during this time)	Travelled by train during the pandemic (Apr-Nov 2020), but not during Dec 2020 – Mar 2021 May or may not have used train pre-pandemic	Travelled by train before the pandemic (before Apr 2020), but not at all during it Used train at least every six months pre-pandemic, not at all since (to Mar 2021)	Travelled infrequently by train before the pandemic (before Apr 2020), but not at all during it Used train less than once every six months pre-pandemic or not at all, and not at all since (to Mar 2021)			
contribution to total survey	33%	13%	23%	31%			
sample* Primary purpose	Understand experiences of travelling by train during a period of full UK lockdown Measure satisfaction with specific	Understand more general experiences of rail travel during the pandemic, more broadly than under full lockdown					
	TOC performance during this time	Understand attitudes, triggers and barriers towards returning to rail					
	Determine priorities for rail as we come out of Covid, and beyond						

*Responses weighted to a nationally representative sample, meaning the total sample represents the total universe of potential post-Covid rail users, with each of these four cohorts weighted to their relative size within this.



Recent users: overview of sub-samples for analysis

Within the **recent users** group (those having travelled by train during December 2020 – March 2021), results are used two ways in the survey findings:

- As individual rail users (e.g. when looking at findings on priorities for rail as we come out of the pandemic). The total sample size for this group of recent rail 1. users is 5,979.
- 2. As evaluations of specific rail journeys made between December 2020 and March 2021 (e.g. when looking at satisfaction results). The total sample size for these journeys is 8,961*; this is higher than the number of individual respondents, since many in this group made multi-leg journeys for which they were asked to answer about more than one TOC if relevant, and respondents were also asked to answer about up to two separate journeys within the survey.

More on the guestionnaire flow, and how these two treatments for the responses are weighted, is given on pages 22-27 and 33-37.an

Results on journeys can be analysed by the following sub-samples**, for example:

Network Rail regions

(if used at respondent level)

Eastern	1,719
North West & Central	1,312
Scotland	410
Southern	1,629
Wales & Western	821

London & South East	5,636
Long Distance	1,624
Regional	1,594

Rail service sectors

(if used at journey level)

Commuter trips	3,489
Non work*** trips	4,736
Business trips	736

Business trips

Journey purpose

(if used at journey level)

Train operating company (TOC)

(and for station results, by station managers) (if used at journey level)

A full breakdown of sample sizes by TOC is given on the following page.

Caution should be used when reading results in some cases, due to relatively small sample sizes.

* Sample sizes for individual questions vary since not all participants are obliged to answer every question.

** Figures do not always sum exactly to the total sample sizes of 5,979 or 8,961. This is due, in these cases, to NR region being

unspecified for some records, and non-franchised TOCs not contributing to sector level results.

***All trips during this period were necessarily "essential travel", in accordance with government guidance.



Recent users: sample sizes by TOC

The survey targeted a minimum of 200 journey evaluations per TOC, which was achieved for all but the smallest TOCs, as shown below. Caution should be used when reading results in some cases, due to relatively small sample sizes.

London and South East (5,636)

c2c	224	London Overground	707
Chiltern Railways	145	South Western Railway	590
Gatwick Express*	61	Southeastern	576
Great Northern	264	Southern	576
Great Western Railway	744	TfL Rail	358
Greater Anglia	433	Thameslink	409
London Northwestern Railway	227	West Midlands Railway	322

Long Distance (1,624)

Avanti West Coast	404
CrossCountry	433
East Midlands Railway	248
London North Eastern Railway	295
TransPennine Express	244

Regional (1,594)

Merseyrail	176
Northern	739
ScotRail	383
Transport for Wales	296

*Gatwick Express included in LSE sector results, but not reported separately due to insufficient sample size

We also collected a small number of responses for non-franchised TOCs (Heathrow Express, Grand Central and Hull Trains. These contributed to national level results, but were not included in any sector results. Neither were they reported separately due to insufficient sample sizes.



Recruiting the survey participants: two sources

Given that the survey took place in March 2021, and a key audience was to be people who had used the train during the previous three months – when travel was restricted to essential journeys only – it was anticipated that some parts of the research sample could be difficult to find. This was heightened by the need to collect sufficient number of journey evaluations for each TOC.

Two main sample sources were therefore used to recruit participants to the survey:

Online research panels

Used to recruit all four user group samples



Research respondents were invited to take part, via a number of reputable online research panels*

Method



- Enabled us to efficiently reach a large number of participants for all four of the rail user sample cells
- Benefits
- Relatively easy to control the sample by demographics and other variables, ensuring good representation of many types of passengers, in terms of travel behaviour, circumstances affecting travel choices, and attitudes

Social media

Used to recruit recent users



The survey was advertised within individuals' "news" feeds on Facebook and Instagram. Note: it was not promoted directly on social media by Transport Focus, TOCs or other organisations

Method

Minimal targeting was applied to reach people aged 18-64, and some geographic targeting was used more in the later stages of the survey to help recruit more recent users of specific TOCs



Benefits

- Though "professional respondents" are controlled for and managed well by reputable online panels, including this second source helped to broaden the sampling beyond those who necessarily had experience with completing surveys. This was suspected to be more important at the time of <u>this</u> survey, when most market and social research was forced to take place online, arguably placing heavier demand on panel members than usual
- ✓ Ability to target geographically to boost TOC sample sizes in particular
- Increased representation in the survey by younger people (typically a harder to engage audience, for surveys like the NRPS)

Recruiting the survey participants: "reserve" sources

Two further potential sample sources were also held in reserve:



More on recruitment via social media

Adverts like the examples here were shown to 18-64 year olds on Facebook and Instagram, inviting people to take part in the survey – with a focus on recruiting for the "recent users" sample cell. Respondents clicked through from the advert to the survey.

Adverts referencing specific train operating companies were used towards the end of the fieldwork period, to help fill the minimum sample size requirement for each (targeting, for example, the Southend area among others to help increase responses from recent c2c users).

Advertising via Facebook generated 60% of this social media-driven sample; Instagram generated 40%.

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What is your opinion on c2c trains ? Take the survey and win up to £50. For the final week of fieldwork (23-31 March), a small prize draw was offered as incentive to help increase overall sample sizes.

It is difficult to fully determine the impact of this, since there were other variables affecting the response rate to this recruitment method at the same time. For example, the timing itself within the fieldwork (those having travelled since December 2020 naturally became increasingly scarcer over time, the government's "stay at home" order was lifted from 29 March which potentially changed travel patterns at the very end of the survey period), and especially the fact that the recruitment became more targeted towards certain TOC users towards the end.

However, analysis suggests that the incentive approximately doubled the rate at which people clicked through to the survey, and the rate for actual completion.

Again, it is difficult to fully determine the impact that this incentive may have had on the profile of survey responders, and the way they answered the survey – and therefore the actual results – given the other variables within the recruitment at this final stage of the survey. Analysis indicates that there were some demographic differences between those who were offered an incentive and those who were not. However, overall the impact on satisfaction ratings was fairly minimal and flattened out with weighting. Examples of this analysis are shown on pages 15-16.

Understanding impact of mixed recruitment methods: Sample profile / attitudes

It is important to acknowledge the potential impact that a mix of sample sources might have on the types of people that take part in the survey, and therefore on their responses, since this could influence the overall findings.

Shown here are differences in the unweighted profiles of recent users who were recruited via social media (SM), and via panels, and an example of attitudinal differences. The following page looks at differences in satisfaction.

As shown here:

- The social media recruitment channel was more skewed towards younger males (whereas the panel sample was controlled on parameters like this, via quota sampling). This may also have driven the higher proportion of commuting journeys, and higher socio-economic group representation within the social media-derived sample.
- The social media sample was also much less London-focussed. This is likely due to the fact that promotion of the survey was geographically targeted during part of the fieldwork, to help increase sample sizes for certain TOCs.
- Those recruited via social media were also somewhat less concerned about Covid-19 overall, which could affect their journey experience if they felt a lower need for safety measures to be in operation, for example.

These variations needed to be controlled via weighting, described on pages 33-37.

 One particular benefit brought by the social media recruitment, beyond the ability to target by location to boost certain TOCs, was the fact that the journeys evaluated by respondents were typically <u>more recent</u>. Arguably this may have made for better quality responses, since the journey experience would have been fresher in respondents' minds.

Unweighted sample profiles by recruitment source

	Gender	SM	Panel	SEG	SM	Panel
	Female	36%	44%	ABC1	70%	66%
	Male	61%	55%	C2DE	25%	33%
,979)	Other / declined	4%	0%	Declined	5%	1%
ers (5	Age	SM	Panel	Region	SM	Panel
nt us	16-24	48%	16%	London	17%	34%
l rece	25-34	17%	23%	Outside London	83%	66%
se: al	35-54	18%	40%	C-19 big concern	SM	Panel
Ва	55-69	11%	16%	Agree	53%	59%
	70+	0%	4%	Neither / DK	18%	21%
	Declined	6%	1%	Disagree	29%	19%
961)	Date of journey	SM	Panel	Journey purpose	SM	Panel
s (8,5	December 2020	17%	25%	Commuting	41%	36%
urney d e: journey:	January 2021	12%	14%	Business	7%	10%
	February 2021	14%	22%	Non-work purpose	52%	54%
Bas	March 2021	57%	40%			
				tran	sport	focus

Understanding impact of mixed recruitment methods: Effect on journey experience ratings

As might be expected from a younger and more male-dominated sample, the journey ratings given by those recruited via social media were less positive. (We have seen consistently similar patterns among male and younger respondents across other *Passenger Surveys* previously).

The unweighted results for overall journey satisfaction are shown on the right. Other metrics follow a similar pattern, if not always with such a big difference between the two sample sources.

It was important to determine the degree to which these differences in satisfaction ratings were driven by factors relating to the sample source itself, versus things like demographics and – importantly given the targeting of social media promotion for certain TOCs – the differing experience by TOC.

Two pieces of analysis were conducted to help with this:

- Analysis of Variance (ANOVA) which determines the influence a given factor has on (in this case) satisfaction. This found that age and gender** had the most impact on satisfaction ratings, followed by sample source, and then some other variables. More specifically, it also found that age and gender had a significant impact on the way satisfaction questions were answered for almost all TOCs (96%), whereas sample source was significant for just under half (46%). The output from this analysis is available on request.
- 2. A **regression analysis** which attempts to disentangle the impact of the various factors in satisfaction, and determine the relative importance of each. Shown in the pie chart on the right, this found that sample source had a relatively small impact on satisfaction, and much less so than other factors.

In conclusion, we can say that sample source <u>does</u> have an impact on the results to the IRPS, but that this is relatively small compared to other profile factors which are a result of the sample source. These factors can be, and were, controlled in the final results via weighting, to minimise any overall "research effect". Weighting is described on pages 33-37.

Unweighted overall journey satisfaction by recruitment source

Base: journeys (8,961)

	SM	Panel
Satisfied	78%	88%
Neither / nor	12%	9%
Dissatisfied	10%	3%

Relative influence on satisfaction rating



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* (In both of these analyses, age and gender were interlocked because the impact on satisfaction by age was found to be different for men and women)

Understanding impact of incentivising social media recruits: Sample profile

A prize draw was offered between 23 and 31 March, the final week of the fieldwork. The analysis on the right shows some key features of the social-media-derived sample before and after the incentive was offered.

While the incentive is likely to have influenced many of these differences, it is important to acknowledge other factors that were present. In particular:

- The incentive was also offered alongside more deliberate regional targeting and a more direct call to action to users of certain TOCs
- As with many online promotional campaigns the performance (views, clickthroughs, and actual completion) had improved at points <u>throughout</u> the campaign due to ongoing optimisation of the creative, placement, day-parting, and so on.

The key differences at this point in the fieldwork were:

- After the incentive was offered, the social media promotion helped to recruit a higher proportion of younger people (16-24 year olds). Before this, the social media-derived sample still would have been younger on the whole than the panels sample, but this was pushed further (and weighting became more necessary) in the later stages of the fieldwork.
- Before the incentive was offered, the typical SEG was more similar between the two sample sources, but this was also changed somewhat once the incentive was introduced, with typically higher SEG participants responding after this.

Unweighted sample profiles by incentive status

Base: all recent users (3,060)

Gender	None	Inc've	SEG	None	Inc've	
Female	36%	44%	ABC1	59%	73%	
Male	61%	55%	C2DE	32%	23%	
Other / declined	4%	0%	Declined	8%	4%	
Age	None	Inc've	Region	None	Inc've	
16-24	25%	53%	London	20%	16%	
25-34	17%	17%	Outside London	80%	84%	
35-54	27%	15%			,	
55-69	19%	9%	Analysis of attitudes towards Covid-19 not possible due to			
70+	1%	0%	%small sample size before incentive was introduced (this question was not asked to all)		his	
Declined	11%	5%			all)	

However, while this meant that more weighting was required to control for age and SEG, the introduction of the incentive (and other variables) also helped to bring
in more female participants, aligning the social media sample more closely with the panels sample than it might otherwise have been, and therefore requiring a little
less weighting for gender.

Understanding impact of incentivising social media recruits: Journey details and experience

As we have seen, respondents recruited via social media were more likely to have made more recent journeys (in March 2020 rather than earlier), and for commuting purposes.

The analysis here shows that this would have been the case before the incentive was introduced, but that – likely linked to the differences in demographics after this point – the incentive (alongside other factors) appears to have enhanced this effect.

The slightly lower age range and higher proportion of commuters within the incentivised sample would often be associated with more negative ratings on opinion and experience-based questions.

However, we saw a trend for slightly <u>higher</u> satisfaction among those who had been incentivised, albeit that this difference was fairly small. (Overall journey satisfaction – shown on the right – saw the greatest variation, with all other satisfaction measures also showing slightly higher satisfaction among the incentivised group, but overall being rated more similarly with and without incentive). It is typical for incentivised respondents to answer more positively, so this is unsurprising.

Ultimately, because the impact on satisfaction ratings was relatively small overall, the effect could be largely controlled by the weighting that was applied at the total sample level.

Unweighted journey details and headline satisfaction results, by incentive status

Base: journeys, SM recruits (4,665)

Date of journey	None	Inc've	Journey purpose	None	Inc've
December 2020	21%	16%	Commuting	38%	42%
January 2021	9%	12%	Business	11%	5%
February 2021	15%	14%	Non-work purpose	51%	53%
March 2021	55%	58%			

Overall satisfaction	None	Inc've
Satisfied	74%	79%
Neither / nor	13%	12%
Dissatisfied	14%	9%



Weighted sample profiles by TOC: London & South East (1)

		·	— Age —	ı	Ger	nder — , r		Journey start time of day*	:: 	г <u> </u>	ourney purpo	ose —	Sam sou	ple rce
	Sample size	16-34	35-54	55+	Male	Female	Peak	Off-peak	Weekend	Comm- uter	Business	Non-work	Panels	Social media
c2c	224	44%	42%	15%	65%	35%	45%	50%	5%	63%	7%	30%	71%	29%
Chiltern Railways	145	46%	39%	15%	60%	39%	55%	39%	4%	41%	24%	36%	73%	27%
Great Northern	264	54%	30%	15%	50%	50%	46%	48%	6%	51%	10%	39%	70%	30%
Great Western Railway	744	46%	41%	13%	60%	40%	40%	52%	7%	27%	20%	52%	66%	34%
Greater Anglia	433	52%	37%	11%	58%	41%	45%	51%	2%	46%	24%	30%	68%	32%
London Northwestern Railway	227	48%	39%	14%	64%	35%	40%	55%	4%	43%	18%	39%	48%	52%

Key features of the sample for each TOC are shown here, using <u>weighted</u>, journey-level data. This is therefore the basis for journey satisfaction results by TOC, as shown in separate, results reports. (Other profiling data within <u>this</u> report is usually shown <u>unweighted</u>, in order to demonstrate and discuss issues relating to sampling and weighting).

* "Peak" combines weekday morning and evening peaks. "Peak" usually means starting the journey between 7-10am, and between 4-7pm respectively. All figures are rounded to 0 decimal places, so may not sum to exactly 100% in this table. Age and gender data shown here do not include those who preferred not to answer.

Weighted sample profiles by TOC: London & South East (2)

		r	Journey start: — Age Gender time of day* Journey purpose							Sam	ple ce			
	Sample size	16-34	35-54	55+	Male	Female	Peak	Off-peak	Weekend	Comm- uter	Business	Non-work	Panels	Social media
London Overground	707	51%	38%	12%	52%	48%	41%	51%	6%	51%	3%	46%	81%	19%
South Western Railway	590	41%	37%	22%	60%	40%	42%	51%	7%	51%	16%	34%	61%	39%
Southeastern	576	39%	45%	16%	60%	40%	44%	49%	7%	47%	21%	32%	65%	35%
Southern	576	54%	33%	13%	56%	44%	42%	52%	6%	48%	9%	43%	64%	36%
TfL Rail	358	58%	38%	4%	53%	46%	39%	57%	3%	53%	5%	22%	79%	21%
Thameslink	409	49%	36%	15%	61%	38%	39%	54%	5%	52%	10%	38%	59%	41%
West Midlands Railway	322	58%	31%	11%	53%	46%	35%	58%	7%	42%	8%	49%	61%	39%

Key features of the sample for each TOC are shown here, using <u>weighted</u>, journey-level data. This is therefore the basis for journey satisfaction results by TOC, as shown in separate, results reports. (Other profiling data within <u>this</u> report is usually shown <u>unweighted</u>, in order to demonstrate and discuss issues relating to sampling and weighting).

* "Peak" combines weekday morning and evening peaks. "Peak" usually means starting the journey between 7-10am, and between 4-7pm respectively.

All figures are rounded to 0 decimal places, so may not sum to exactly 100% in this table. Age and gender data shown here do not include those who preferred not to answer.

Weighted sample profiles by TOC: Long Distance

		r	— Age —		Journey start: Gender time of day* Journey purpose								Sam sou	ple ce
	Sample size	16-34	35-54	55+	Male	Female	Peak	Off-peak	Weekend	Comm- uter	Business	Non-work	Panels	Social media
Avanti West Coast	404	51%	29%	20%	55%	45%	41%	53%	7%	10%	21%	69%	74%	26%
CrossCountry	433	51%	40%	9%	57%	43%	38%	57%	5%	15%	26%	59%	64%	36%
East Midlands Railway	248	41%	37%	22%	57%	43%	51%	45%	4%	23%	27%	50%	69%	31%
London North Eastern Railway	295	40%	34%	26%	63%	37%	44%	48%	7%	9%	30%	61%	64%	36%
TransPennine Express	244	45%	41%	14%	70%	30%	42%	46%	12%	29%	12%	60%	43%	57%

Key features of the sample for each TOC are shown here, using <u>weighted</u>, journey-level data. This is therefore the basis for journey satisfaction results by TOC, as shown in separate, results reports. (Other profiling data within <u>this</u> report is usually shown <u>unweighted</u>, in order to demonstrate and discuss issues relating to sampling and weighting).

* "Peak" combines weekday morning and evening peaks. "Peak" usually means starting the journey between 7-10am, and between 4-7pm respectively.

All figures are rounded to 0 decimal places, so may not sum to exactly 100% in this table. Age and gender data shown here do not include those who preferred not to answer.

Weighted sample profiles by TOC: Regional

		Journey start: Gender time of day* Journey purpose							Sample source					
	Sample size	16-34	35-54	55+	Male	Female	Peak	Off-peak	Weekend	Comm- uter	Business	Non-work	Panels	Social media
Merseyrail	176	42%	34%	24%	59%	41%	40%	53%	7%	56%	1%	44%	43%	57%
Northern	739	42%	40%	18%	59%	40%	37%	57%	5%	43%	8%	49%	53%	47%
ScotRail	383	31%	52%	17%	62%	37%	33%	61%	5%	34%	13%	53%	74%	26%
Transport for Wales	296	64%	24%	12%	61%	39%	48%	48%	4%	29%	11%	60%	49%	51%

Key features of the sample for each TOC are shown here, using <u>weighted</u>, journey-level data. This is therefore the basis for journey satisfaction results by TOC, as shown in separate, results reports. (Other profiling data within <u>this</u> report is usually shown <u>unweighted</u>, in order to demonstrate and discuss issues relating to sampling and weighting).

* "Peak" combines weekday morning and evening peaks. "Peak" usually means starting the journey between 7-10am, and between 4-7pm respectively.

All figures are rounded to 0 decimal places, so may not sum to exactly 100% in this table. Age and gender data shown here do not include those who preferred not to answer.

Quantitative survey in detail

2: The questionnaire and key analysis approaches

The questionnaire: overview





Journey attributes rated by recent users in the survey

During the survey, recent users (having used rail between December 2020 and March 2021) rated:

(If multiple TOCs used)	(or one TOC if multiple used, in which case this would be a different TOC from that in section 3)				
	Section 4, as outlined on page 23				
	Frequency				
Punctuality / reliability	Punctuality / reliability				
	Scheduled journey duration				
	Sufficient room for all to sit / stand				
Sufficient room for all to sit / stand	Information provision during journey				
	How well passengers looked after for COVID-19				
Cleanlinean	Cleanliness				
Cleaniness	Comfort of seats				
	Toilet facilities on board				
How well passengers looked after for COVID-19	Ventilation on board				
····· F -···· B -··· B -·· B -··· B -··· B -··· B -··· B -··· B -··· B -·· B -···	Passengers keeping a social distance				
	Passengers wearing face coverings (properly)				
Overall journey satisfaction for TOC	How well TOC dealt with any delay				
	Overall journey satisfaction for TOC				
	Section 3 / 6, as outlined on page 23 Punctuality / reliability Sufficient room for all to sit / stand Cleanliness How well passengers looked after for COVID-19 Overall journey satisfaction for TOC				

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Points of definition for recent users and their journeys

For recent users (those travelling between December 2020 and March 2021), when evaluating their journeys:

- Respondents were asked to think about <u>National Rail</u> journeys and services.
- They were asked to comment on:
 - Their most recent journey (December 2020 to March 2021). For 52%, this most recent journey was in March itself, 80% had travelled within 2021.
 - If they made an outward and return trip on the same day, half were directed to focus on the outward journey and half the return journey. This helped to
 generate a mix of journeys at different times and with different contexts (i.e. avoiding a skew towards journeys either into or out of urban centres), and a mix
 of passenger mindsets ("going out" versus "going home").
- As outlined on the previous page, those who had used more than one TOC for their most recent journey were asked to comment on <u>one</u> of those TOCs via some key attributes only, including overall journey satisfaction, and another <u>one</u> of those TOCs via the full set of journey attributes. This enabled more "observations" to be generated for individual TOCs, strengthening the overall sample size. The TOCs for evaluation in this scenario were chosen systematically by the survey programme on a "least full" basis. Respondents who had only used one TOC were asked to rate the full set of journey attributes for that TOC.

Note that these points around the definition of the journey that people evaluated through the survey are somewhat different to the NRPS. In the NRPS, passengers were asked to comment on a single leg of a journey (i.e. relevant to one TOC only), and that journey was being made at the time they were invited to participate, rather than up to three months prior. These are among a number of important differences between this survey – the IRPS – and the NRPS, which mean that comparisons should only be drawn between the two surveys with extreme caution. Other ways in which the two surveys differ are set out on page 43. (The direction to comment on National Rail services only is consistent with the NRPS.)

The unit for the journey ratings (satisfaction questions) given by this user group is journeys. Some respondents commented on two journeys, and these have been counted separately (2,657 [30%] of respondents in this Recent User sample cell have more than one record in the dataset, one for each journey). Therefore, while the total number of people surveyed in this sample cell is 5,979, the total number of journeys that have been evaluated is 8,961. These journeys have been weighted using journey weights, whereas other findings from the survey, where the unit is individual rail users, have been weighted using rail user weights. The weighting is described in more detail on pages 33-37.

The questionnaire: other groups' experiences and attitudes



The questionnaire: priorities and future travel



Key driver analysis

Identifying factors that influenced recent users' journey experience during the pandemic

To help further understand recent users' level of satisfaction with their experience on trains, key driver analysis (KDA) was conducted to determine which other surveyed journey attributes had stronger and weaker relationships with overall journey satisfaction. KDA assesses all variables simultaneously, and the interactions between them.

This enables us to infer the relative level of importance of different attributes, helping to identify which aspects of journeys are the most relevant for assessing performance. This type of analysis can also highlight priorities for the future, though this is less relevant here as circumstances around rail travel change through 2021.

In the IRPS, KDA was able to explain half (0.5) of the variance in overall journey satisfaction ratings, based on the "very" and "fairly" satisfied response options (which is the same approach used in the NRPS). This means that the model in this case is doing a good job of explaining journey satisfaction, but that 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. (In fact the variance explained is higher than for NRPS, which was typically around 0.3).

Within the variance explained, each attribute with a statistically significant relationship to overall journey satisfaction has been given a "score" out of 100. This scoring is for ease of interpretation, and shows the relative importance of each attribute. The attributes found to have a significant relationship, and their scores, are shown here.

A second KDA was also conducted, to identify specific on-board factors that influence overall "experience on the train"; this is also shown on the right.

Key drivers of overall journey satisfaction (all adding to 100) Experience on train Handling of any delay

• • •	
How well pax looked after re Covid	9.6
Sufficient room for all to sit / stand	6.8
Value for money	6.3
Punctuality / reliability	6.1
Information during journey	5.5
Scheduled journey duration	5.3
Frequency	53

43.1

Key drivers of overall experience on board train

(all adding to 100)



MaxDiff:

Determining passenger priorities for rail while Covid is present

"

We wished to determine passengers' priorities, from a set of practical measures and service features, for travelling while Covid was still present. Maximum Difference Scaling (MaxDiff) was used, with the following question asked to all participants (all four sample cells):

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.

Respondents shown four service features per screen, from the list shown on the right.

The question was repeated 12 times to each respondent, with different sets of service features each time (and with some repetition, of features). Across the sample as a whole, this enables analysis to determine an overall importance score for each feature.

The importance scores are placed on a scale of 0-100 for ease of interpretation, and add up to 100. The scores show relative priority, where for example, if a feature's score is twice as high as another, this means it was twice as important to the survey participants.

Relative importance scoring (all adding to 100) Having enough space (sitting or standing) 19 Steps to manage passenger flow and help with social distancing 15 Trains are punctual and reliable 13 Inside of train well maintained and clean 10 Good ventilation on board 9 Trains sufficiently frequent at the times I travel Hand sanitiser available at stations and on trains Toilet facilities on train well maintained and clean Clear signage and announcements on Covid-19 safety Faster journey to where I want to travel to 3 Staff visible and ensure you feel safe 3 Accurate, timely info about services on trains and at stations Passengers kept informed about delays 2 Good connections with other train services All survey participants (11,479)

TURF:

Combinations of service features to best meet passenger priorities

In addition to the MaxDiff itself, a TURF* analysis was also extracted from this data. The aim of TURF is to maximize the utility of the data by determining the optimal <u>combination</u> of attributes that will serve the most people. That is: while item 1 ("Having enough space") might be the most important of all factors when they are looked at individually, TURF acknowledges the fact that, for example, the combination of items 3 and 6 might together have higher importance for more people.

For the IRPS, we optimised up to an "80% threshold" **. This means that for any individual to count as having their priorities sufficiently met, the sum of their MaxDiff priorities (i.e. the importance scores shown at aggregate level on the previous page) must be 80 or higher. The analysis then sought the best combination of these service features to give this score of 80, for as many people as possible.

The example output given in the main findings report (replicated here) displays the proportion of individuals who would reach this 80% satisfaction threshold as more service features are added to the set.

It was found that when 10 of the service features are in place, this would meet the needs of almost nine in ten (87%) non-recent rail users (as at March 2021). In particular, at this point it was the addition of staff being visible to ensure safety which made a real difference.

An additional output is an interactive model in which it is possible to experiment with different combinations of service features, to view the potential impact on passenger needs being met. It is also possible to filter this model and outputs on certain sub-groups of rail users.



* Total Unduplicated Reach and Frequency

** TURF can work with thresholds of 50-95%. 80% was chosen as it was felt this represented the circumstances in which most of an individual's core requirements are met.



Determining scenarios for returning to rail: questions

Section 11 in the questionnaire was designed to determine the circumstances in which rail user groups would most likely return to (or in a minority of cases begin) travelling by train.

This section was asked to all except recent users, i.e. all except those who had travelled within the previous three months, as at March 2021. All participants in the survey were also already screened as not being outright rejecters of rail travel.

The question flow was as shown on the right.

The following page outlines the key outputs from the responses.



Respondents were asked which of a range of conditions they would expect to be in place, in order that they would travel by train. These were presented one by one, in the following "topics":

- 1. Practical steps that TOCs can take, including specific measures around social distancing, making hand sanitiser and face coverings available, and financial incentives
- 2. Personal perceived level of Covid risk
- 3. Degree to which other aspects of society are open / free
- 4. Personal choice vs. obligation to travel
- 5. Vaccination roll-out status

In order not to overstate the importance of the measures which are potentially influenced by operators, half (selected at random) of all those answering this question were presented with these topics in the order above, and half were presented with item 1 last, with item 2 first and all other items following in the same order.



11C

After answering each of the conditions questions, respondents were presented with their own "personalised" scenario in which they would potentially travel by train. They had the opportunity to go back in the survey and amend answers if they disagreed with this summary scenario.

Based on their summary scenario, respondents were asked about the type of journey that they would be most likely to take in this context:

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- Journey purpose
- Frequency
- · Whether this would be more or less frequent than before the pandemic

Determining scenarios for returning to rail: outcomes

The set of questions outlined on the previous page generated 4,000+ different combinations of conditions, as the scenarios in which rail users expect to travel by train as Great Britain emerges from the Covid-19 pandemic.

From this, a key driver analysis was conducted to determine the relative importance of each individual element within each of the "topics". The results of this KDA are presented in the main results report as also shown here.

The relative importance of each element is shown with a score out of 100, where all scores sum to 100*. A higher score denotes greater influence on propensity to travel. Scores for the elements within each "topic" are also shown added together, providing a summary of the influence of this type of factor overall. This provided the important finding that, while there are many things about the pandemic and the way out of that TOCs cannot influence, TOCs themselves can have some practical influence on encouraging people back to rail – in fact overall, TOCs can influence nearly half of the public's likelihood to travel again (with an influence score of 47 out of 100).

Note that the negative figure for "places being open with strict Covid restrictions" indicates that when this scenario is in place, on average it makes people feel a little <u>less</u> likely to travel by train. This negative figure is not contributing to the sum of factors relating to the openness of society.

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

Base: all non-rejectors of rail, who had not travelled by train between November 2020 and March 2021 (3,343)



Quantitative survey in detail

3: Weighting the sample



Weighting: introduction

Results for the IRPS are weighted in two ways:

Data at **respondent level** are weighted to provide a demographically representative sample for each of the rail user groups, and to ensure that these user groups are represented in appropriate size proportion, relative to each other.

Data at **journey level** (journey satisfaction ratings) are weighted to account for frequency (i.e. so that more frequent journeys have more weight within the results than ad hoc journeys), as well as TOC and journey purpose (commuter, business and leisure or non-work journeys). As described over the following pages:

The respondent-level weighting was relatively minimal, with an overall weighting efficiency of c. 80%.

This weighting efficiency is relevant to the majority of results for the IRPS, for attitudes and priorities around returning to rail, among all user groups.

The journey-level weighting involved stretching the data to account for both very frequent and ad hoc journeys, as well as applying rim weights to ensure that TOCs were represented proportionately to each other (where they had all been subject to minimum base sizes in the unweighted sample), and that TOC data was representative by journey purpose.

This resulted in an overall weighting efficiency (after both respondent-level and journey level-weights) of around 25%. This is fairly low, but unsurprising given the requirements.

This weighting efficiency is relevant only to satisfaction results among recent users.

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This report gives an overview of the weighting approach, describing principles used and the reasons for each stage of weighting. A full, detailed description of the methods, including how source data was gathered, is given in a separate weighting report, available from Transport Focus.

Weighting at respondent level: stage 1-2

There were two stages to this weighting, which produced a set of weighted data for the analysis of relevant questions based on **people**:

22Producing a representative sample across all completed survey responses and for each sample cell	(?) Why	The overall dataset did not necessarily represent rail user groups in Great Britain accurately in terms of demographics and attitudes, especially given that respondents were recruited from two sources which were demographically very different	We also considered implementing further weights to control for any attitudinal differences between those recruited from social media and panels. However, as
	رې کې How	This stage used records from the panels only, since panels were easily sampled within appropriate demographic paraments in the first place. This meant the "raw" online panel sample was reasonably representative of the GB population. However, to improve accuracy further (and partly because multiple panels were used), records were rim weighted to GB population profiles for age, gender, region and SEG. The four user groups then fell out naturally from this. Note: at this stage, to better estimate the size and profile make-up of each user group (sample cell), weights were applied to all respondents that started the survey, even if they subsequently screened out as quota-fails, outright rejectors of rail, or if they dropped out by choice.	discussed on page 13-14, attitudinal variations were mostly driven by demographic differences, and variance in satisfaction was influenced by factors including demographics and TOC used – more so than sample source in its own right. Therefore, attitudinal variations between the two sample sources
	? Why	People recruited via panels and social media needed to be added together in one overall dataset, but they had very different demographic profiles	demographic weights described here, and controlled further by journey weights described on the next page. The decision to limit the number and types of weights
	ر ک How	 Stage 1 (above) identified a target sample size for each of the rail user sample cells, and a target demographic profile for each of them. From this, rim weights were generated and applied to all complete, valid responses from across both sample sources. This therefore corrected for any demographic imbalances in the social media sample in particular (as discussed on pages 13-14). 	was also taken partly in order to preserve the overall effective sample size (weighting efficiency) as far as was possible.
	L		

Weighting at journey level: stage 3 (recent users data only)

Each respondent in the recent users sample cell was able to answer questions (at least "key metrics") about multiple TOCs, across up to two distinct end-to-end trips. A separate dataset was therefore produced for journey-level results, which contains a record for each TOC journey (or leg within a journey).

Each TOC (leg) is linked to a reported frequency and journey purpose for the overall trip in which that TOC was used, meaning these three factors (TOC, frequency and journey purpose) can be used as the basis of weighting.

There were a further two stages of weighting to create the journey-level results (stage 4 is described on the following page):

3 Accounting for frequency	? Why	This survey was sampled at respondent level, rather than at journey level. This means that journeys which might happen daily are represented by one respondent (one record), and journeys which might happen only annually are also represented by one record.
	(O) How	In order that all journeys (TOC legs) were represented more fairly and truthfully, the reported frequency of each journey was used to estimate the number of times that journey would take place each year, and this was applied as a factor to each record. For example typically taking place one a month was factored up by 12; a journey taking place on four days a week (assuming 45 weeks of travel per year) was factored up by 180 (4x45).

Weighting at journey level: stage 4 (recent users data only)

4 Producing representative samples by TOC, and within TOC	(?) Why	 Stage 3 above gave each record an appropriate influence within the overall dataset, based on frequency. However, we had set minimum sample sizes for each TOC, meaning that smaller TOCs would be over-represented within any national-level or other aggregate results, and larger TOCs would be under-represented – distorting the national-level findings. Within each TOC, we also wished to make the data further representative of the types of journey being made at the time (December 2020 – March 2021). Some TOCs typically carry more commuter journeys; others carry more non-work journeys, and journey purpose context is known (at least in normal, non-pandemic times) to influence people's experience and expectations – and therefore their satisfaction as recorded in passenger surveys. 	* Gathering accurate passenger numbers, and generating good estimates of how these were split by journey purpose, were not straightforward, since these needed to be relevant to the time of the survey, when travel was reduced and normal journey patterns greatly
	(C) (C) How	Data published by the Office of Road and Rail (ORR) for actual passenger journeys* was used to create a matrix of journey numbers for TOC x journey purpose (commuter, business and leisure). From this, target rim weights were derived where the sum of rim weights across all TOCs was 100%. These rim weights were then applied to equivalent TOC x journey purpose cells in the recent users journey-level dataset. This brought this dataset into line, with TOCs represented proportionately to each other, and with appropriate journey purpose profiles within each TOC.	altered. The approach used to estimate TOC x journey purpose profiles within relevant ORR data is described in full the separate, detailed weighting report.
Weighting for station satisfaction	? Why	Station satisfaction questions were asked about the start station for a whole trip, regardless of how many leg involved. While there are up to four journey records in the dataset for each respondent – one for each TOC only be one set of station ratings per overall journey they evaluated. These station ratings needed to be we	gs or TOCs were they used – there will ighted appropriately.
ratings	්රි දිරි How	 Each set of station ratings was attributed to one TOC, and given the relevant weight, in the same way as oth that TOC. The TOC chosen here was determined (in this order) as either: The TOC which was used for the overall journey, if only one was used The TOC which calls at the station in question, if more than one was used for the overall journey Assigned at random from among all relevant TOCs used, if more than one of them calls at the station in question 	ner journey ratings for
			_ transportfocus

Qualitative supporting research

Further detail



Qualitative supporting research: phase 1

Day

2

Day

3

Day

Overview

12-24 January 2021

The first phase of qualitative research provided an initial understanding of experiences of rail travel during Covid, and attitudes towards Covid-19 and using rail now (January 2021) and in the future. This informed the quantitative survey by helping to refine its topics and the language used.

Most of this research was conducted via an online platform (Recollective), via which participants completed tasks that were set for them individually.

Responses were either video "selfies", or typed responses to the open-ended questions. Moderators also interacted with the participants over the three days, keeping them engaged and encouraging them to expand on interesting points. Moderators also shared ideas and views from some participants with the others, for further exploration.

Older, vulnerable and non-users were interviewed in-depth and 1-2-1, via Zoom.

Three days of engagement with participants

Intro to the participants

- Participants introduce themselves, including typical travel
- behaviour before Covid and how this has changed
- Initial overview of expectations for returning to rail, and what will make this comfortable

Experience of rail during the pandemic

- Detailed descriptions of journey made anytime during pandemic, including thoughts and feelings, and how it might have been improved if at all
- Tasks encouraged participants to think in detail about:
 - Planning the trip
 - The journey to the station
 - \circ At the station
 - o Boarding
 - The time on board
 - Arriving at the destination

Returning to rail

- Summarising participants' own priorities and issues, and spontaneous ideas for addressing them
- Prompting on specific issues and possible ways to manage them: cleanliness, social distancing, financial incentives
- · Final selfie video to summarise key points and priorities

The sample

12 recent users

(used train Nov-Dec 2020 excluding festive period, or Jan 2021)

12 infrequent / reduced users

(used train before pandemic, but either very infrequently, or much reduced, during it; not used train Nov 2020 – Jan 2021)

12 older (60+) or vulnerable passengers

A range of disabilities or vulnerabilities, including a mix of recent, lapsed and reduced users

6 non-users

(though no outright rejecters)

Across the sample as a whole, a mix of:

- Gender, age, ethnicity, region, urban/rural residence, concern for Covid-19
- Typical rail journey purpose and length (where relevant), level of choice over use of train

Qualitative supporting research: phase 2

Overview

12 Mar – 6 Apr 2021

The second phase of qualitative research further supported the main quantitative survey, by providing an opportunity to discuss and explore some of its emerging findings, and by bringing those findings to life with additional detail and real life examples of people's experiences, and how they felt about rail at this time and going forward.

This phase was also conducted mainly via Recollective, again involving a mix of typed and selfie-video responses, and ongoing moderation. The research took place over three days, as outlined here.

The focus group discussions on the last day were conducted via Zoom.

Three days of engagement with participants

Intro to the participants

Day 2

3

Day

- Participants introduce themselves, including travel behaviour pre- Covid
- Series of open ended questions on:
 - Impact of Covid on daily life and travel
 - Attitudes to Covid-19, to travel now (March 2021) and in future

Rail travel in the short and longer term future

- Series of open ended questions to explore:
 - How participants feel about this, and their expectations
 - Factors to encourage rail travel, and / or to help people feel comfortable travelling by train

Discussion groups (conducted as 1-2-1 depth interviews with disabled participants) focussing on:

- How operators could encourage rail travel, in the shorter and longer term
- Specific focus during part of the discussions on communications and messaging, as a way of accessing passengers' priorities for what they want to know and how they want to be treated

Additional "live" journeys

A further group gave feedback on real journeys (via Recollective):

- Commentary on all aspects of a journey as it happened, from booking to final destination, and communications from operators throughout
- Video selfies to summarise thoughts and experiences
- In-depth 1-2-1 interview after the journey, to discuss

The sample

27 recent users

(used train in the 3 months to March 2021) Forming six groups for day 3

27 lapsed and/or reduced users

(used train before pandemic, but either not, or much reduced, during it; not used train in the three months to March 2021) Forming a further six groups for day 3

Discussion groups also formed with commonalities between participants for region, journey purpose, overall concern for Covid-19, and typical journey length

7 passengers with a range of disabilities,

including a mix of recent, lapsed and reduced users

7 people making "live" journeys,

including a mix of journey types (made for essential reasons)

Across the sample as a whole there was a mix of gender, age (18-75+), ethnicity, region and urban/rural residence.

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Appendix

Guidance for comparing results from the IRPS and NRPS



Comparing the IRPS and NRPS:

Differences in research approaches

We acknowledge that there may be value for some operators, or others, in drawing comparisons between IRPS results for recent users (those travelling between December 2020 and March 2021), and results from the NRPS in Spring 2020, which was the most recent wave of the NRPS. This can give an indication of how passenger sentiment has changed (or not) since then, and can put the IRPS results into context to aid interpretation.

Indeed, some comparisons between the two surveys have been made in the main findings report. However, these comparisons focus on overall findings rather than specific data, and on <u>relative</u> differences rather than absolute changes in – for example – the percentage of passengers who are satisfied with their journey. For instance, TOCs are evaluated according to how their scores vary from their sector average, and this is compared to an equivalent variation from average, from the NRPS.

There are a range of important differences between the two surveys, which make comparisons between them very difficult. Key differences in the research itself are summarised on the following page.

Of course, all of the research effects covered on the following page are in addition to the very obvious difference in context surrounding the IRPS compared to the NRPS:

- Because of the Covid-19 pandemic, travel was restricted to essential trips only in England during part of the time period for journeys people were asked about, and restrictions and guidance varied across Great Britain during this time. This meant that passenger footfall was significantly lower than in normal times, and in some cases service frequency was reduced, both of which impacted greatly on passengers' experiences.
- The kinds of people travelling at this time were also different from normal, with people making journeys because they needed to, rather than some being out of choice, and with the more anxious and at-risk groups being more likely to avoid travel, especially by public transport. This means the mindset of people when they were travelling would have been different on average than normal, and typically it was noted that older people were more likely to avoid travel, leaving a younger population of rail users than normal.

A timeline of guidelines and legal restrictions surrounding the Covid-19 pandemic can be found here, providing further context to the IRPS results.

In general we would advise against making comparisons between the IRPS and NPRS. Where necessary, comparisons should be drawn with extreme caution – and Transport Focus' Insight team will be happy to help in this respect with any specific queries (see contact details at the end of this document).

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Comparing the IRPS and NRPS:

Differences in research approaches

Questionnaire structure and wording

The precise order in which respondents are asked to rate different aspects of their journeys is not the same as in NPRS, and the IRPS contains some different topics which are not covered in the NRPS (like Covid-19!), and excludes others from the NRPS. All of this can influence the way that people answer satisfaction and ratings questions. The phrasing of some common aspects of train travel is also not always exactly consistent

Sample profile

The IRPS was initially weighted to a representative demographic profile for Great Britain (accounting for both rail users and outright rejecters). This, and the fact that the social media recruitment channel brought in a lot of younger people in particular, meant that the weighted sample make up was different to that of the NRPS – whereas it has been previously acknowledged that the NRPS may underrepresent the youngest passengers somewhat.

Other aspects of weighting were also very different, with no weighting for station size band in the IRPS, for example.

Journey definition

In the NRPS, people answer about a single leg of a train journey, which they are making on the day they are invited to take part. In the IRPS, people answered about multi-leg journeys (if they made them), as well as some ratings for individual legs, and up to two trips overall.

Sampling and recruitment

Using comprehensive data on passenger numbers, the NRPS was sampled to ensure that journeys starting from a stratified selection of all stations were included, and that journeys from different day parts were proportionate to each other. Passengers were recruited to take part as they were making actual journeys. IRPS sampling was also national, but was necessarily more "removed" from in-the-moment journeys (since research needed to take place online) and was not able to have the same controls on station spread, time of day and other factors. Many respondents in the IRPS were also incentivised, either as panel members or with a prize draw via social media, which was not the case in the NRPS.

Recency of travel

In the NRPS, people are intercepted as they are making a journey and answer about that journey, typically completing the survey within a few days, if not immediately. In the IRPS, people answered about a journey of up to three months previous (though half of them answered about a journey within the same month). This was necessary given the unusual circumstances and the challenges of finding rail users at this time, but could have affected their recall, compared to that in the NRPS.

Completion methods

The IRPS was completed entirely online. While an online option had been offered to NRPS participants for a few years, a substantial proportion of all NRPS surveys were still completed on paper. Online responses have previously been found to be less positive overall, than those given on paper questionnaires, and so this could have affected the results in the IRPS.

Further questions?

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