Britain's railway:
what matters to passengers

2022

transport**focus**

Foreword

transport**focus**

We asked over 15,000 rail passengers across Great Britain to tell us what is important to them. The research provides an importance ranking for 25 aspects of rail services and also shows how passengers think the railway is performing in each of those areas. This gives a clear view on what matters to passengers and where the railway should target investment and effort to meet passengers' aspirations. We were pleased to work in partnership with Network Rail on this research to help inform its investment plans for the next five-year period from 2024 - 2029, known as Control Period 7.

The research found passengers' top two priorities for the railway – well ahead of others – are the 'price of train tickets offers value for money' and 'reliability and punctuality'. This reaffirms that what matters most to passengers is a punctual and reliable railway that delivers on the timetable's promise at an acceptable price. The railway must maintain its focus on this.

Passengers' other key priorities also reflect an emphasis on the railway getting the basics right. Passengers want sufficiently frequent trains and accurate and timely information about train times and any delays. They want a seat on board a clean train and, of course, they need to feel safe. These are not the only things that matter, but passengers will judge the railway on how effectively it delivers its 'core product'.

This research explored passengers' views on key issues facing the railway, including the accessibility of the network, its impact on the environment, and the timing of engineering works. It also explored the views of 'lapsed' passengers – those who hadn't travelled in the last 12 months.

The railway must keep improving accessibility for older and disabled passengers, a priority in the Government's Plan for Rail. The research shows the accessibility of trains and stations is the most important factor of all for passengers who travel with a wheelchair or mobility scooter.

The research reveals that passengers view the ability to cope with adverse weather as the most important environmental issue for the railway. This reflects the challenges the railway already faces today with extreme weather, but also the need to future-proof against the reality of climate change.

The last few years have been turbulent for both passengers and the railway. As the railway adapts to the changes in how people need and want to travel, and faces a difficult financial environment, it's important that passengers' voices are heard. We hope this research is helpful in ensuring that what matters to passengers informs important decisions about rail services and investment.

Anthony Smith
Chief executive, Transport Focus

Foreword

Network Rail owns and manages the railway infrastructure in England, Scotland and Wales. We work with the train operators to deliver train services as safely, reliably and punctually as possible.

Every five years Network Rail sets out its plans for the next five-year investment period. At the beginning of the current investment period, Network Rail reorganised and created five regions, split into 14 routes, with the intention of putting passengers first in our decision-making and delivery. These organisational changes, coupled with a strengthening of our customer service culture, means decisions are made much closer to passengers and the communities we serve. Since then the pandemic has caused lasting shifts in how passengers use the railway and has challenged us to adapt faster, become more efficient and continue to demonstrate value for money.

We were pleased to work with Transport Focus on this research to help inform each of the Network Rail regions' strategic business plans for the next investment period starting in 2024. Ensuring we have the best possible understanding of what's important to passengers is an important part of our commitment to putting passengers first and developing credible plans, especially given the very challenging economic climate for the railway and the country more widely.

Passengers want and deserve a punctual and reliable railway. We are focused on reducing delays and disruption for passengers and freight users by seeking to stop faults occurring and improving both how we work and the technology we use to quickly find and fix faults. However, we are also experiencing periods of extreme weather more frequently, leading to significant delays and disruption. Responding to more extreme weather and climate change is a multi-generational challenge for the railway and a central theme of our planning for the next Control Period.

Network Rail can't deliver everything that's important to passengers on its own, but we're committed to working collaboratively with the train operators to improve the railway for passengers. As rail reform continues, we look forward to working together to create an efficient railway that's fit for the future and provides the best possible service for passengers and freight users.

Paul McMahon
Director, Planning and Regulation, Network Rail

Introduction

We asked 15,226 passengers from around Great Britain to tell us what is important to them. 12,565 passengers who had travelled by train in the previous 12 months were asked to identify what matters most to them for rail travel from a list of 25 options. The most important are value for money of train tickets, and reliability and punctuality of services. The remaining 2661 people, who had not travelled in the last 12 months, were asked why they had stopped travelling by rail and what might encourage them back.

Alongside the overall findings presented here for all passengers, the results have also been analysed by sub-groups of the passenger population, including their journey purpose, age, nation, region, train company and whether they have a disability – many of which are shown in this report.

It is also possible to carry out bespoke analysis using a 'simulator' tool, which can be used to identify what is most important to different rail industry sectors or groups of passengers. For example, for commuters of a specific age, or splitting results between passengers who live in urban or rural areas.

The simulator tool, along with instructions on how to use it, can be found on our website.

The research also involved 'deep dives' to help us understand the passenger perspective on key issues facing the railway today. These help us understand passengers' views in more detail on:

- punctuality and reliability, and potential trade-offs with more train services or quicker journey times
- the importance of investment in environmental improvements and sustainability including powering trains with renewable energy and the railway's ability to cope with adverse weather
- the 'least bad' times for engineering work when it is necessary to close the railway to maintain or improve the infrastructure
- factors that affect the accessibility of the railway with a specific focus on the needs of disabled people
- what is likely to have the greatest influence on encouraging a return to rail travel among people that hadn't travelled by train in the last 12 months.

What matters to rail passengers in Great Britain 2022

1 Price of train tickets offers value for money

2 Reliability and punctuality

3 Sufficiently frequent trains

4 Accurate and timely information about train times

5 Getting a seat on the train

6 My personal security on the train

7 Being kept informed about delays and the options I might have

8 My personal security at stations

9 Quick journey times

10 Inside of trains being clean and well-maintained

Icon size in the red circles relates to what matters to rail passengers. The more important, the larger the icon.

How passengers prioritise other areas

11th A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat
12th Easy to buy the right ticket
13th Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.
14th Good connections with other train services

15th Engineering works planned to keep passenger disruption to a minimum
16th Comfortable seats on trains
17th Good connections with other public transport at stations
18th Well-maintained, clean toilets on the train
19th An environmentally responsible railway that is reducing its carbon emissions

20th Helpful staff at stations
21st Stations being clean and well-maintained
22nd Helpful staff on trains
23rd Reliable Wi-Fi and mobile reception on trains
24th Easy to claim compensation when delayed
25th Sufficient space on the train for luggage

Key findings

Overall importance

The research used a methodology known as Maximum Difference Scaling (MaxDiff) which asks passengers to trade off different features of the railway to allow us to identify what matters most to rail passengers. A fuller explanation of how the research was carried out is given in Appendix A.
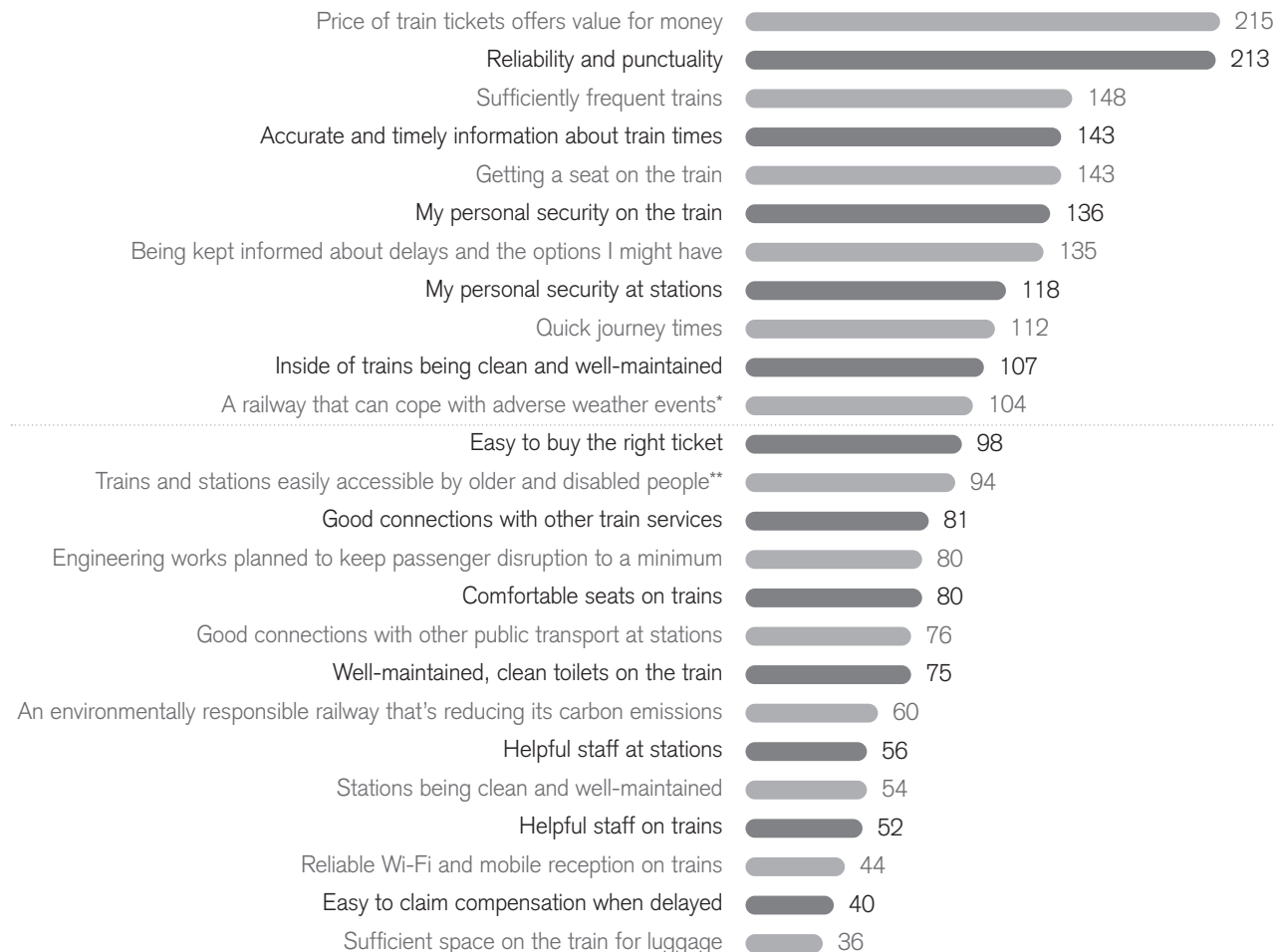
By using this technique we can present the results in terms of the rank order of importance and also see how much more, or less, important one factor is compared to another.

This chart shows both the rank order and relative level of importance for passengers throughout Great Britain. To assess the relative ranking we use an index score. A score of 100 means that the feature is of average importance: anything ranked over 100 has above average importance and anything below 100 has less than average importance. For example, a feature with a score of 200 is twice as important as average and a score of 50 is half as important as average.

The 'price of train tickets offers value for money' is the most important feature for passengers, followed very closely by 'reliability and punctuality'. Both are more than twice as important than the average. Having 'sufficiently frequent trains' is the third most important feature, followed by both receiving 'accurate and timely information about train services' and 'getting a seat on the train'.

What matters to passengers

Feature	Score
Price of train tickets offers value for money	215
Reliability and punctuality	213
Sufficiently frequent trains	148
Accurate and timely information about train times	143
Getting a seat on the train	143
My personal security on the train	136
Being kept informed about delays and the options I might have	135
My personal security at stations	118
Quick journey times	112
Inside of trains being clean and well-maintained	107
A railway that can cope with adverse weather events*	104
Easy to buy the right ticket	98
Trains and stations easily accessible by older and disabled people**	94
Good connections with other train services	81
Engineering works planned to keep passenger disruption to a minimum	80
Comfortable seats on trains	80
Good connections with other public transport at stations	76
Well-maintained, clean toilets on the train	75
An environmentally responsible railway that's reducing its carbon emissions	60
Helpful staff at stations	56
Stations being clean and well-maintained	54
Helpful staff on trains	52
Reliable Wi-Fi and mobile reception on trains	44
Easy to claim compensation when delayed	40
Sufficient space on the train for luggage	36

Sample size **12,565**

* A railway that can cope with adverse weather events for example snow, wind, flooding and extreme heat
** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage.

How features contribute to the passenger experience

Feature	Value
Price of train tickets offers value for money	215
Reliability and punctuality	213
Sufficiently frequent trains	148
Accurate and timely information about train times	143
Getting a seat on the train	143
My personal security on the train	136
Being kept informed about delays and the options I might have	135
My personal security at stations	118
Quick journey times	112
Inside of trains being clean and well-maintained	107
A railway that can cope with adverse weather events*	104
Easy to buy the right ticket	98
Trains and stations easily accessible by older and disabled people**	94
Good connections with other train services	81
Engineering works planned to keep passenger disruption to a minimum	80
Comfortable seats on trains	80
Good connections with other public transport at stations	76
Well-maintained, clean toilets on the train	75
An environmentally responsible railway that is reducing its carbon emissions	60
Helpful staff at stations	56
Stations being clean and well-maintained	54
Helpful staff on trains	52
Reliable Wi-Fi and mobile reception on trains	44
Easy to claim compensation when delayed	40
Sufficient space on the train for luggage	36

Sample size **12,565**

Punctuality, reliability and journey times

On-train experience

At-station experience

Ticketing/ prices

Environment and sustainability

* A railway that can cope with adverse weather events for example snow, wind, flooding and extreme heat
** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage.

AmyHeycock

This chart groups each rail feature in terms of the passenger experience it is most closely connected to.

Apart from the price and value for money of train tickets, what matters most to passengers on the railway tends to fall into two areas.

First, the delivery of, and communication around, the rail service itself, including reliability and punctuality (ranked second), sufficiently frequent trains (third), accurate and timely information (fourth) and being kept informed about delays (seventh).

And secondly, passengers' experiences on the train. Getting a seat on the train (fifth) and personal security on trains (sixth) were of significantly above average importance to passengers. The station experience and concerns about experience and sustainability issues are lower priorities.
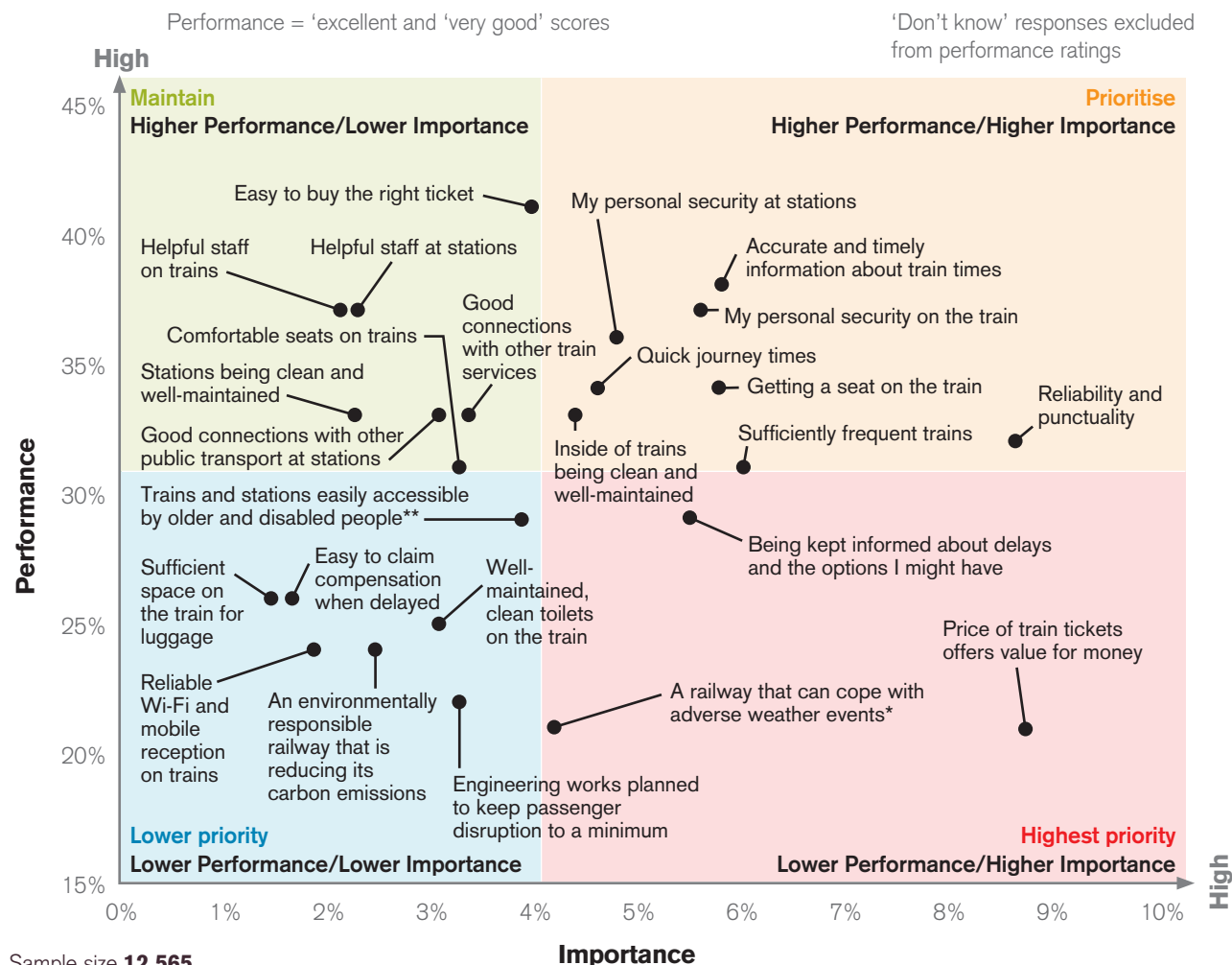
What matters most – importance vs performance

As well as understanding what matters most to passengers, the research also gathered passengers' views on the performance of the railway in respect of the same 25 features. By comparing this with the rankings of importance we can identify which areas are most important to prioritise for future investment.

This chart combines 'performance' and 'importance' scores. Performance is measured in terms of the percentage of people rating the railway as 'excellent; or 'very good', while 'importance' comes from the MaxDiff analysis explained earlier. In this way we can identify four main boxes (or quadrants) – for example, high importance, low performance; or high importance and high

performance and so on.

Those features in the red box (highest priority) are of above average importance and below average performance – this includes the value for money of tickets, being kept informed about delays and a railway that can cope with adverse weather. Those in the top right quadrant (prioritise) are both of higher than average importance and higher than average performance – these are important to passengers and the railway should continue to focus on the delivery of these features, for example, those relating to personal security, communication, and the railway's 'core product' like getting a seat, frequency of trains and reliability of services.

Importance vs performance – all current passengers

Performance = 'excellent and 'very good' scores

'Don't know' responses excluded from performance ratings

High

Maintain
Higher Performance/Lower Importance

Prioritise
Higher Performance/Higher Importance

- Easy to buy the right ticket
- My personal security at stations
- Helpful staff on trains
- Helpful staff at stations
- Accurate and timely information about train times
- Good connections with other train services
- My personal security on the train
- Comfortable seats on trains
- Quick journey times
- Getting a seat on the train
- Stations being clean and well-maintained
- Reliability and punctuality
- Good connections with other public transport at stations
- Sufficiently frequent trains
- Inside of trains being clean and well-maintained
- Trains and stations easily accessible by older and disabled people**
- Being kept informed about delays and the options I might have
- Sufficient space on the train for luggage
- Easy to claim compensation when delayed
- Well-maintained, clean toilets on the train
- Reliable Wi-Fi and mobile reception on trains
- An environmentally responsible railway that is reducing its carbon emissions
- A railway that can cope with adverse weather events*
- Price of train tickets offers value for money
- Engineering works planned to keep passenger disruption to a minimum

Lower priority
Lower Performance/Lower Importance

Highest priority
Lower Performance/Higher Importance

Performance (y-axis): 15%, 20%, 25%, 30%, 35%, 40%, 45%
Importance (x-axis): 0%, 1%, 2%, 3%, 4%, 5%, 6%, 7%, 8%, 9%, 10%

High

Sample size **12,565**

* A railway that can cope with adverse weather events for example snow, wind, flooding and extreme heat
** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage.

What matters by journey purpose

Regardless of the journey purpose, value for money and reliability and punctuality are the most important areas for the railway to get right. While there are broadly consistent views on the importance of the other features of the railway, there are also occasional differences. What matters most for commuters is getting to work. Their needs centre around reliable, good value, frequent trains, quick journey times, information provision, communication and good connections with other services. Business passengers have the most diverse range of needs, placing greater importance than average on areas such as connections with other train and public transport services, the railway being environmentally responsible and reliable Wi-Fi on trains. In contrast, leisure passengers have a smaller range of needs, with value for money, reliability and getting a seat on a train particularly important to this group. Those on personal business have similar needs to the average for all passengers, but consider the accessibility of the railway to be slightly more important.

What matters to rail passengers by journey purpose

	Great Britain		Commuter		Business		Leisure		Personal	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	1	204	2	184	1	240	2	199
Reliability and punctuality	2	213	2	204	1	191	2	230	1	203
Sufficiently frequent trains	3	148	3	148	3	140	4	153	3	147
Accurate and timely information about train times	4	143	4	142	4	135	5	146	4	144
Getting a seat on the train	5	143	7	126	6	124	3	164	7	128
My personal security on the train	6	136	5	137	8	122	6	143	6	133
Being kept informed about delays and the options I might have	7	135	6	136	5	132	7	135	5	137
My personal security at stations	8	118	8	121	10	109	8	122	8	117
Quick journey times	9	112	9	117	7	124	10	105	9	113
Inside of trains being clean and well-maintained	10	107	11	102	11	100	9	113	11	103
A railway that can cope with adverse weather events (snow, wind etc)	11	104	10	115	9	113	12	93	10	107
Easy to buy the right ticket	12	98	13	92	13	93	11	104	13	94
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	12	97	12	95	13	90	12	102
Good connections with other train services	14	81	15	86	14	93	17	72	14	88
Engineering works planned to keep passenger disruption to a minimum	15	80	14	86	15	89	16	73	15	85
Comfortable seats on trains	16	80	18	71	17	80	14	86	18	74
Good connections with other public transport at stations	17	76	16	81	16	89	18	65	16	84
Well-maintained, clean toilets on the train	18	75	17	73	18	78	15	74	17	74
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	64	19	71	20	50	19	67
Helpful staff at stations	20	56	20	58	22	57	19	53	20	58
Stations being clean and well-maintained	21	54	21	56	21	60	21	50	21	57
Helpful staff on trains	22	52	22	54	23	54	22	49	22	54
Reliable Wi-Fi and mobile reception on trains	23	44	23	48	20	67	23	30	23	50
Easy to claim compensation when delayed	24	40	24	47	24	54	25	29	24	44
Sufficient space on the train for luggage	25	36	25	37	25	46	24	30	25	39
Sample size:	12,565		2329		2323		5576		2337	

What matters to passengers by nation

What matters to passengers is broadly similar between nations. Unsurprisingly, what matters to passengers in England is very similar to the average for Britain as a whole, because passengers in England account for a high proportion of all passengers. In contrast, there are some differences in Wales and Scotland where getting a seat on a train and the trains being clean and well maintained are more important. Within Scotland, the value for money of tickets and sufficiently frequent trains are also of above average importance, whereas in Wales, quick journey times and the ability of the railway to cope with adverse weather are lower than average priorities.

What matters to rail passengers by nation

	Great Britain		England		Scotland		Wales	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	1	214	1	225	1	217
Reliability and punctuality	2	213	2	212	2	220	2	212
Sufficiently frequent trains	3	148	3	148	3	156	4	146
Accurate and timely information about train times	4	143	4	143	5	143	5	144
Getting a seat on the train	5	143	5	141	4	154	3	152
My personal security on the train	6	136	6	137	6	131	6	135
Being kept informed about delays and the options I might have	7	135	7	136	7	129	7	132
My personal security at stations	8	118	8	119	9	111	8	117
Quick journey times	9	112	9	113	10	109	11	98
Inside of trains being clean and well-maintained	10	107	10	106	8	113	9	115
A railway that can cope with adverse weather events (snow, wind etc)	11	104	11	104	11	107	12	92
Easy to buy the right ticket	12	98	12	98	12	97	10	100
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	13	95	13	93	13	91
Good connections with other train services	14	81	14	82	16	74	16	81
Engineering works planned to keep passenger disruption to a minimum	15	80	15	82	17	72	18	72
Comfortable seats on trains	16	80	16	79	14	86	14	86
Good connections with other public transport at stations	17	76	17	77	18	69	17	74
Well-maintained, clean toilets on the train	18	75	18	73	15	81	15	84
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	60	19	60	19	61
Helpful staff at stations	20	56	20	56	20	54	20	59
Stations being clean and well-maintained	21	54	21	54	21	54	21	58
Helpful staff on trains	22	52	22	51	22	52	22	56
Reliable Wi-Fi and mobile reception on trains	23	44	23	44	23	44	23	44
Easy to claim compensation when delayed	24	40	24	41	25	33	25	34
Sufficient space on the train for luggage	25	36	25	36	24	34	24	39
Sample size:	12,565		11,043		1000		522	

What matters by sex and age

While the two most important features of the railway remain the same between sexes and age groups, there are differences among the wider priorities. Males are more likely to be interested in quicker journey times and the ease of buying a ticket, whereas females place greater importance on their personal security and being kept informed about delays and the options open to them.

In terms of age, younger passengers are more likely than average to prioritise being kept informed about delays, a railway which can cope with adverse weather and the accessibility of the railway. In contrast, older passengers place greater importance on value for money, reliability, getting a seat on the train and the inside of trains being clean and well maintained.

What matters to rail passengers by sex and age

	Great Britain		Male		Female		18-34		35-54		55+	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	1	212	1	220	1	190	1	224	2	234
Reliability and punctuality	2	213	2	210	2	217	2	184	2	217	1	242
Sufficiently frequent trains	3	148	3	154	5	143	6	132	3	150	4	165
Accurate and timely information about train times	4	143	5	139	4	147	4	142	5	142	5	145
Getting a seat on the train	5	143	4	144	7	142	11	105	4	144	3	186
My personal security on the train	6	136	8	118	3	157	5	133	6	142	6	133
Being kept informed about delays and the options I might have	7	135	6	128	6	143	3	144	7	133	7	129
My personal security at stations	8	118	12	102	8	137	7	120	8	123	9	111
Quick journey times	9	112	7	123	12	100	10	109	9	118	10	109
Inside of trains being clean and well-maintained	10	107	9	106	9	108	12	100	10	106	8	116
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	104	10	105	11	101	8	115	11	100	13	95
Easy to buy the right ticket	12	98	11	105	13	91	13	95	12	98	11	102
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage	13	94	15	83	10	108	9	112	13	88	14	82
Good connections with other train services	14	81	14	85	15	77	15	88	14	83	16	71
Engineering works planned to keep passenger disruption to a minimum	15	80	16	82	14	78	14	90	15	79	17	71
Comfortable seats on trains	16	80	13	87	18	71	19	65	16	79	12	98
Good connections with other public transport at stations	17	76	17	79	17	72	16	86	17	77	18	63
Well-maintained, clean toilets on the train	18	75	18	76	16	73	18	76	18	73	15	75
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	62	19	57	17	76	19	56	22	45
Helpful staff at stations	20	56	21	56	20	56	21	61	20	53	19	52
Stations being clean and well-maintained	21	54	20	56	21	51	20	62	21	52	21	48
Helpful staff on trains	22	52	22	53	22	51	23	57	22	49	20	49
Reliable Wi-Fi and mobile reception on trains	23	44	23	51	23	36	22	58	23	44	23	28
Easy to claim compensation when delayed	24	40	24	46	24	33	24	54	24	37	25	26
Sufficient space on the train for luggage	25	36	25	40	25	31	25	47	25	32	24	27
Sample size:	12,565		5984		6509		4497		4406		3662	

Deep dives

Reliability and punctuality

Passengers were presented with a series of scenarios to explore their preferences with regards to reliability, punctuality, frequency and speed of services. On balance, passengers are looking for the railway to get the core existing service working smoothly. They value consistency of service (more trains arriving on time) over a railway which seeks to deliver ev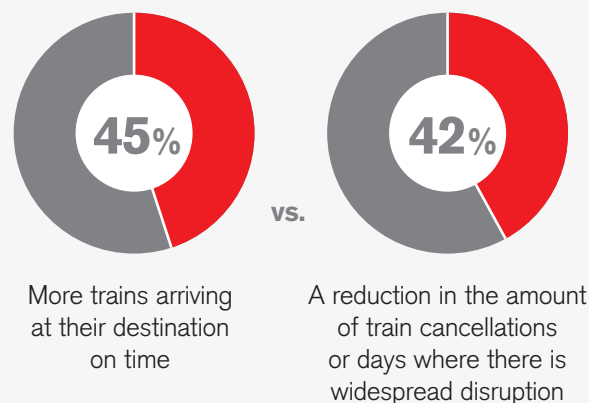er quicker or more frequent services at the risk of impacting on reliability. As an example, in the scenarios on the chart opposite, almost three quarters of passengers (72 per cent) believe it is more important for trains to run to schedule, compared with one in five (19 per cent) who would prefer a quicker service which may increase the chance of delays. Passengers living in rural areas and those who commute to work are more likely to regard reliability as important.
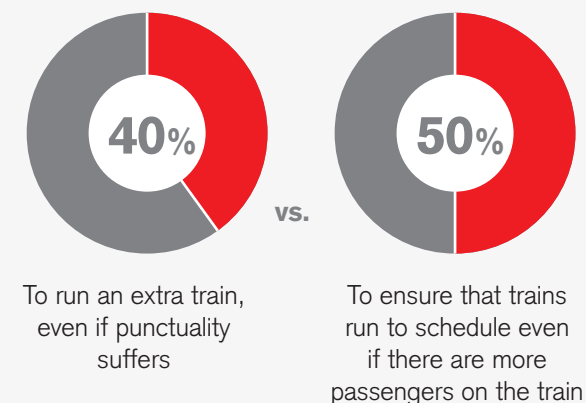
AmyHeycock

Importance and reliability
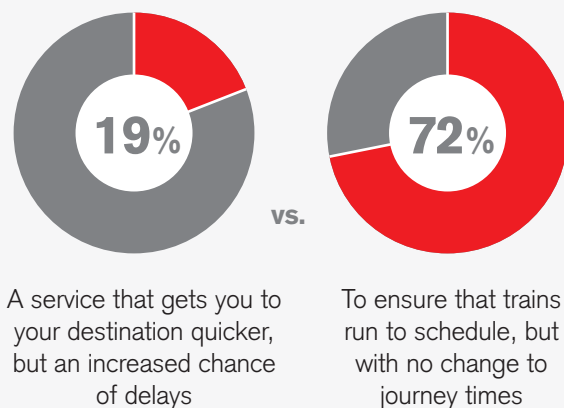
What is more important to you?

45% vs. **42**%

More trains arriving at their destination on time

A reduction in the amount of train cancellations or days where there is widespread disruption

'Don't know' responses (12%) removed.

What is more important to you?

40% vs. **50**%

To run an extra train, even if punctuality suffers

To ensure that trains run to schedule even if there are more passengers on the train

'Don't know' responses (10%) removed.

What is more important to you?

19% vs. **72**%

A service that gets you to your destination quicker, but an increased chance of delays

To ensure that trains run to schedule, but with no change to journey times

'Don't know' responses (9%) removed.

What is most important to you?

Most important

37% | **31**% | **26**%

More trains arriving on time | Fewer cancellations | Fewer days of major disruption
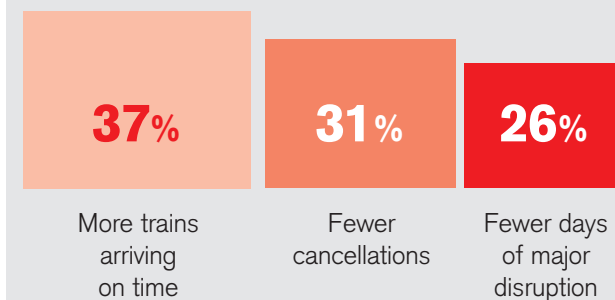
'Don't know' responses (6%) removed.
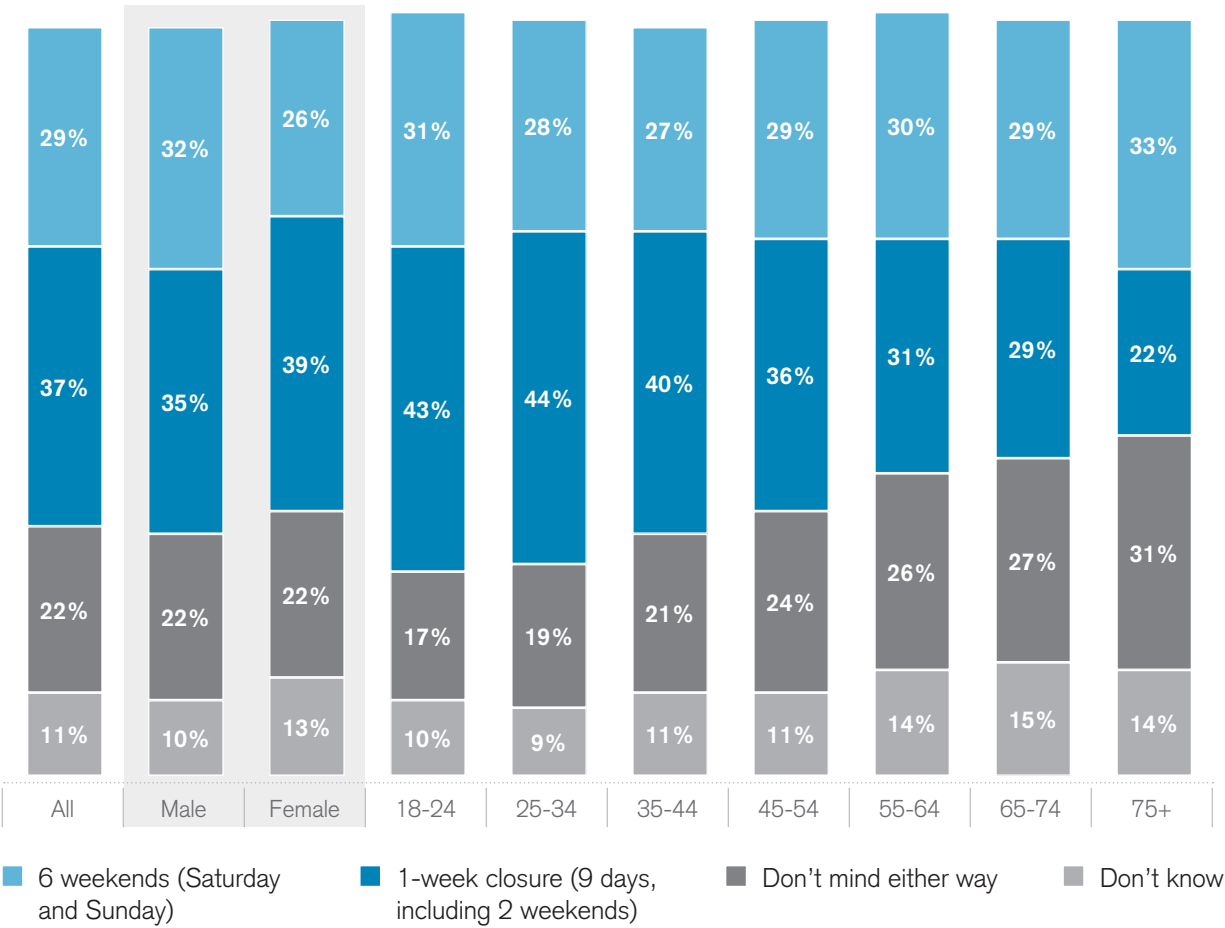
Sample size **12,565**

Engineering work

We asked passengers about the 'least bad' time for the railway to be closed for engineering work. The research found that Sundays are, by a significant margin, perceived to be the least disruptive days of the week for a planned closure. However, sometimes bigger projects need more time to maintain and improve the railway. So, we sought to understand whether passengers have a preference for a shorter but continuous period of planned disruption, or one which is spread out over a longer period but only at weekends.

As illustrated on this chart, on balance passengers slightly prefer one closure of nine days including two weekends (37 per cent) over a series of six weekend closures (29 per cent). Age is a significant influence on opinions. Young people are significantly more likely to prefer a one-week closure, while older people are less likely to have an opinion or don't mind when the closures take place.

Other differences between passenger types indicate that the more frequently that a passenger travels, the more favourable they are towards the six-weekend closure option for engineering works.

Favoured planned closure periods by sex and age

	All	Male	Female	18-24	25-34	35-44	45-54	55-64	65-74	75+
6 weekends (Saturday and Sunday)	29%	32%	26%	31%	28%	27%	29%	30%	29%	33%
1-week closure (9 days, including 2 weekends)	37%	35%	39%	43%	44%	40%	36%	31%	29%	22%
Don't mind either way	22%	22%	22%	17%	19%	21%	24%	26%	27%	31%
Don't know	11%	10%	13%	10%	9%	11%	11%	14%	15%	14%

- 6 weekends (Saturday and Sunday)
- 1-week closure (9 days, including 2 weekends)
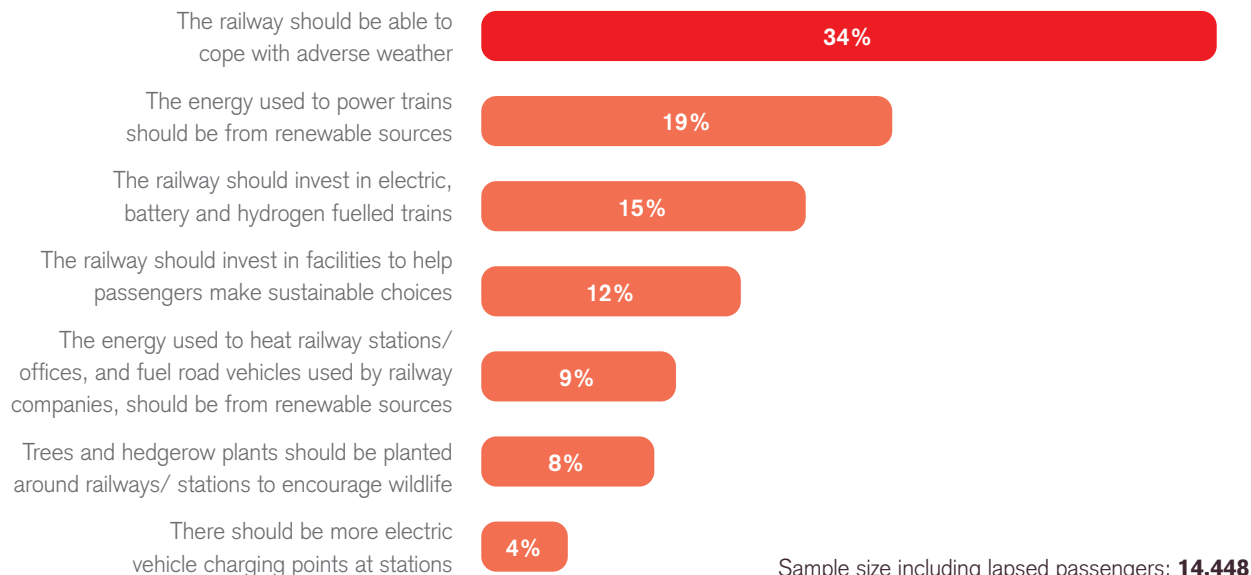- Don't mind either way
- Don't know

Sample size **12,565**

The railway and the environment

The railway has a responsibility to mitigate its impact on the environment and to adapt for the impacts of a changing climate. We asked passengers for their views on which areas of potential investment are most important. In recent years many passengers will have experienced disruption due to extreme weather, such as high winds and severe winter storms. Furthermore, these questions were asked very soon after the disruption caused by extremely high temperatures in summer 2022; this may have magnified passengers' concerns.

As this chart shows, passengers rate the ability of the railway to cope with adverse weather as the most important environmental issue (34 per cent). This is unsurprising given the link to reliability and punctuality, one of the most important attributes for passengers overall. However, the way in which trains are powered is of equal importance when we combine those who would like greater use of renewable resources (19 per cent) with the desire for the railway to invest in electric, battery and hydrogen fuelled trains (15 per cent).

What matters to passengers – railway and the environment

Statement	Percentage
The railway should be able to cope with adverse weather	34%
The energy used to power trains should be from renewable sources	19%
The railway should invest in electric, battery and hydrogen fuelled trains	15%
The railway should invest in facilities to help passengers make sustainable choices	12%
The energy used to heat railway stations/ offices, and fuel road vehicles used by railway companies, should be from renewable sources	9%
Trees and hedgerow plants should be planted around railways/ stations to encourage wildlife	8%
There should be more electric vehicle charging points at stations	4%

Sample size including lapsed passengers: **14,448**

Accessibility and disability

In common with all passengers, value for money and the reliability and punctuality of train services are what matter most to disabled passengers. However, it is not a surprise that accessible trains and stations are significantly more important for disabled passengers than for the rest of the population.

In contrast, disabled passengers place less importance on journey times and the frequency of trains (although this is still of above average importance).

What matters to passengers by disability

	All		No disability		Disability	
	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	1	224	1	198
Reliability and punctuality	2	213	2	223	2	192
Sufficiently frequent trains	3	148	3	157	7	132
Accurate and timely information about train times	4	143	4	148	5	133
Getting a seat on the train	5	143	5	147	3	136
My personal security on the train	6	136	6	137	4	135
Being kept informed about delays and the options I might have	7	135	7	137	6	133
My personal security at stations	8	118	9	118	9	119
Quick journey times	9	112	8	119	12	99
Inside of trains being clean and well-maintained	10	107	10	107	11	106
A railway that can cope with adverse weather events (snow, wind etc)	11	104	11	102	10	107
Easy to buy the right ticket	12	98	12	100	13	95
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	13	81	8	121
Good connections with other train services	14	81	14	81	14	83
Engineering works planned to keep passenger disruption to a minimum	15	80	15	80	16	80
Comfortable seats on trains	16	80	16	80	17	79
Good connections with other public transport at stations	17	76	17	74	18	79
Well-maintained, clean toilets on the train	18	75	18	71	15	81
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	54	19	70
Helpful staff at stations	20	56	21	51	20	65
Stations being clean and well-maintained	21	54	20	51	22	59
Helpful staff on trains	22	52	22	47	21	61
Reliable Wi-Fi and mobile reception on trains	23	44	23	41	23	51
Easy to claim compensation when delayed	24	40	24	38	24	44
Sufficient space on the train for luggage	25	36	25	32	25	42
Sample size:	12,565		8406		4159	

When types of disability are taken into consideration, those whose disability affects their mobility rank getting a seat on a train and the accessibility of the railway of higher importance than average. Related to this, those who regularly travel with a mobility scooter or wheelchair rate the accessibility of the railway as the thing which matters most to them, above value for money and the reliability and punctuality of the railway. People with a mental health condition are more likely than average to consider communications as important, including accurate and timely information, and being kept informed during delays. Compared with all passengers, those with a mental health condition are also more likely to consider their personal security on the railway to be important.

What matters to rail passengers by type of disability

	Sensory		Mobility		Mental Health		Learning		Mobility scooter/ wheelchair user	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	183	1	193	1	207	1	181	2	154
Reliability and punctuality	2	176	2	187	2	198	2	167	3	145
Sufficiently frequent trains	4	127	6	125	6	135	8	118	10	103
Accurate and timely information about train times	6	124	7	124	3	142	4	127	8	109
Getting a seat on the train	3	132	3	157	8	126	7	119	6	115
My personal security on the train	7	122	5	136	4	142	5	126	4	123
Being kept informed about delays and the options I might have	5	126	8	123	5	141	3	131	5	117
My personal security at stations	9	109	9	119	7	126	9	113	7	112
Quick journey times	12	103	14	89	12	98	13	93	20	82
Inside of trains being clean and well-maintained	11	105	10	110	11	103	11	103	11	101
A railway that can cope with adverse weather events (snow, wind etc)	10	109	11	99	10	111	10	111	9	105
Easy to buy the right ticket	13	98	12	91	13	95	12	101	15	92
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	8	116	4	147	9	119	6	126	1	160
Good connections with other train services	16	84	16	80	15	81	14	88	18	85
Engineering works planned to keep passenger disruption to a minimum	17	84	18	73	14	82	18	86	17	86
Comfortable seats on trains	15	87	13	90	19	70	19	75	21	82
Good connections with other public transport at stations	18	81	17	76	16	77	15	87	19	85
Well-maintained, clean toilets on the train	14	88	15	86	17	74	17	87	13	95
An environmentally responsible railway that is reducing its carbon emissions	19	76	21	64	18	72	16	87	16	87
Helpful staff at stations	20	69	19	72	20	61	20	74	12	97
Stations being clean and well-maintained	22	65	22	59	21	57	22	65	22	72
Helpful staff on trains	21	67	20	68	22	56	21	70	14	94
Reliable Wi-Fi and mobile reception on trains	23	61	23	47	23	51	23	63	24	64
Easy to claim compensation when delayed	25	54	25	39	24	41	24	52	25	63
Sufficient space on the train for luggage	24	55	24	45	25	36	25	51	23	69
Sample size:	**864**		**1459**		**1756**		**709**		**329**	

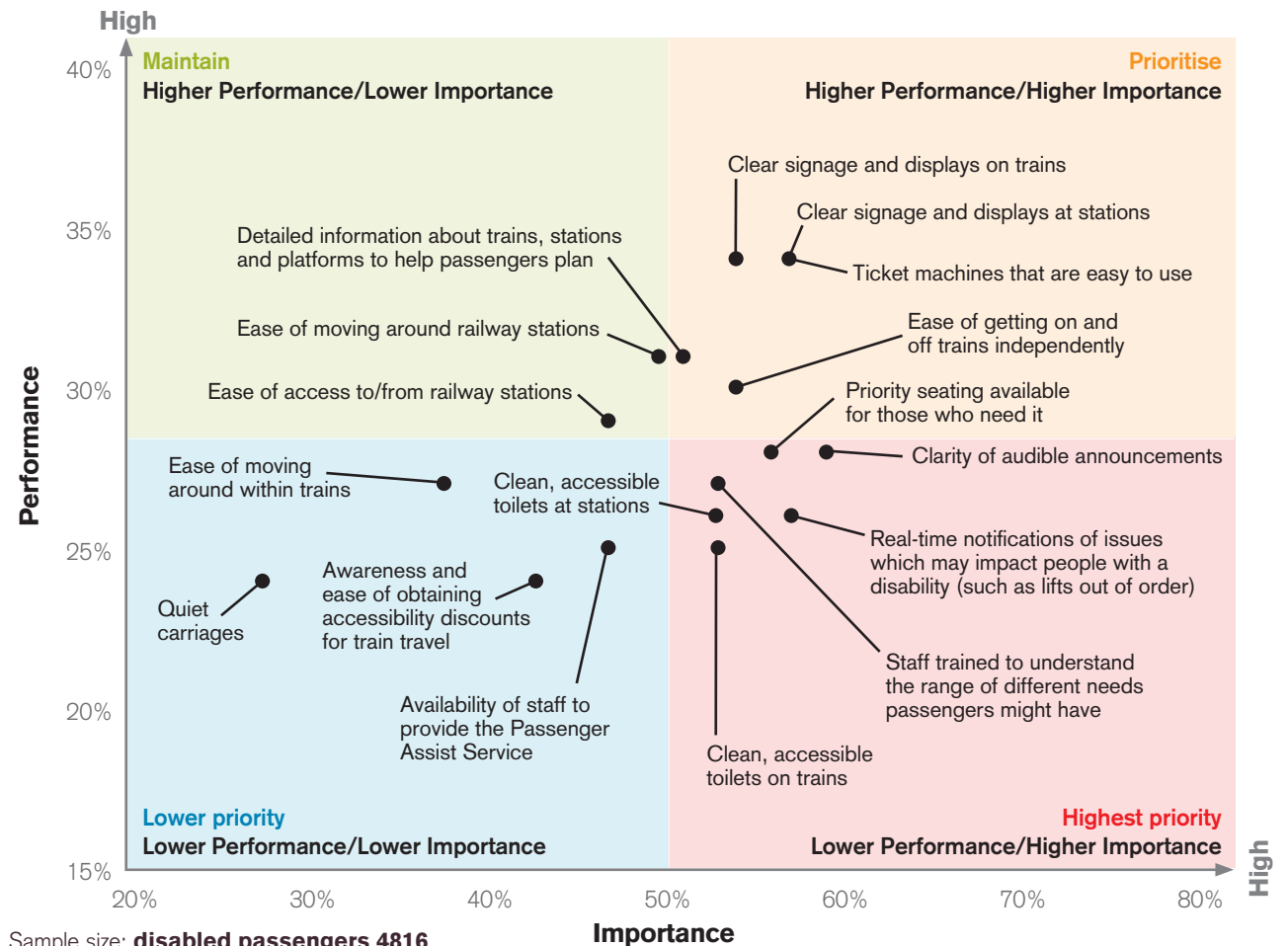# Accessibility features – importance vs performance

We asked disabled passengers about how important 17 railway accessibility related features are to them, and how well they feel the railway is currently performing in these areas.

This chart combines 'performance' and 'importance' scores. Performance is measured in terms of the percentage of disabled passengers rating the railway as 'excellent' or 'very good', while 'importance' comes from the percentage of those disabled passengers rating them 'very important'. In this way we can identify four main boxes (or quadrants) – for example, high importance, low performance; or high importance and high performance and so on.

Those in the red box (highest priority) include clean and accessible toilets (on trains and at stations), the availability of priority seating, well trained staff that understand passengers' needs and real-time communications about issues which may impact disabled passengers. In contrast, those in the top right quadrant on the chart (prioritise) illustrate some of the areas where the railway is performing better – such as signage – but remain important to focus on.

Importance versus performance of accessibility features – disabled passengers

High

Maintain	Prioritise
Higher Performance/Lower Importance	Higher Performance/Higher Importance

Clear signage and displays on trains

Clear signage and displays at stations

Detailed information about trains, stations and platforms to help passengers plan

Ticket machines that are easy to use

Ease of moving around railway stations

Ease of getting on and off trains independently

Ease of access to/from railway stations

Priority seating available for those who need it

Ease of moving around within trains

Clean, accessible toilets at stations

Clarity of audible announcements

Quiet carriages

Awareness and ease of obtaining accessibility discounts for train travel

Real-time notifications of issues which may impact people with a disability (such as lifts out of order)

Availability of staff to provide the Passenger Assist Service

Staff trained to understand the range of different needs passengers might have

Clean, accessible toilets on trains

Lower priority	Highest priority
Lower Performance/Lower Importance	Lower Performance/Higher Importance

Performance

Importance

High

Sample size: **disabled passengers 4816**

Performance = 'Excellent' and 'Very good' scores. Importance = 'Very important' scores.
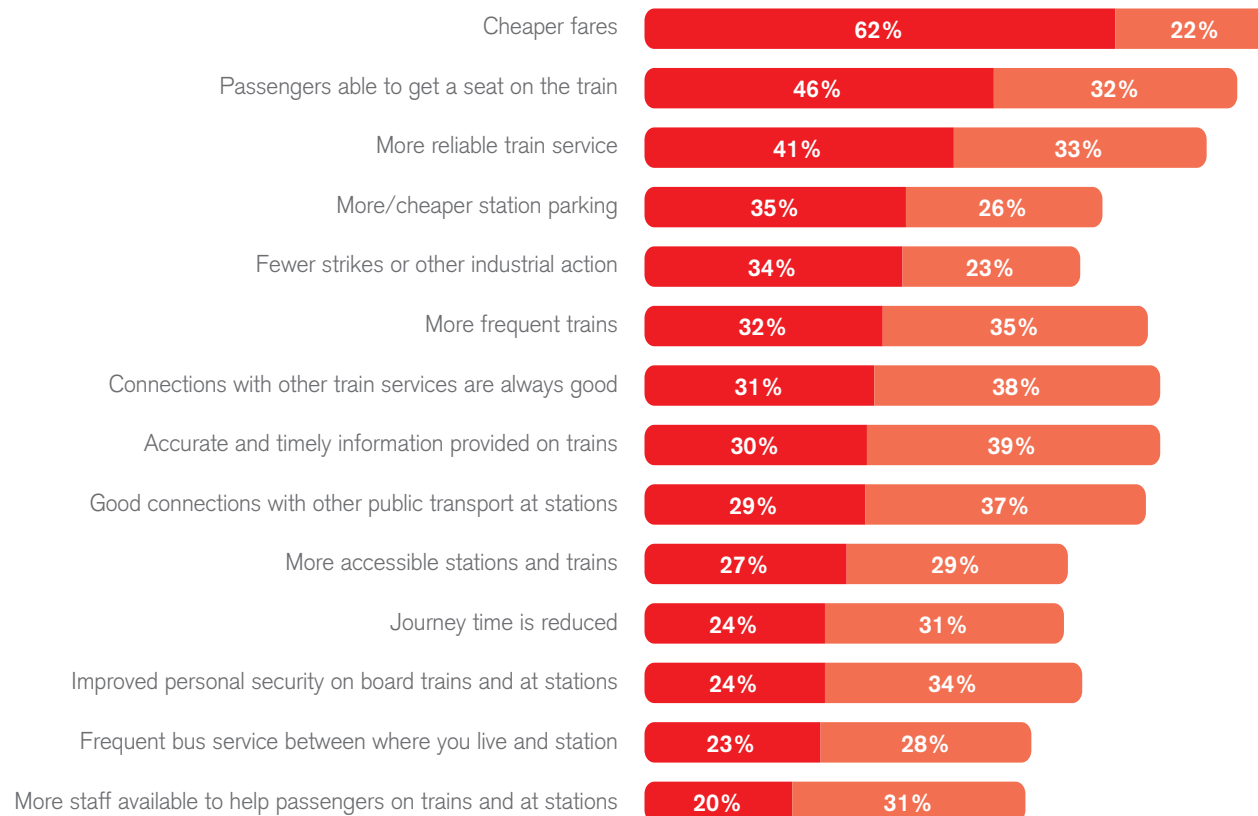
Encouraging greater use of the railway

We wanted to understand the views of people that have travelled by train in recent years, but not in the last 12 months. Almost two thirds of these 'lapsed' rail passengers say that cheaper fares would be very likely to encourage them to travel by rail.

In addition, those who have stopped using the railway or are using it less than before the pandemic, were asked why. For commuters, the top two reasons are the price of train tickets (32 per cent)

and because they have started working more from home (29 per cent). Business passengers also mentioned the price of train tickets (26 per cent) but the fact that they tend to use Zoom or Teams meetings instead was most important (36 per cent). Leisure passengers were most likely to reference the price of train tickets (39 per cent) alongside a reduction in the types of leisure trip that they used to make by train (32 per cent).

AmyHeycock

Encouraging greater use of the railway

	Very likely	Fairly likely
Cheaper fares	62%	22%
Passengers able to get a seat on the train	46%	32%
More reliable train service	41%	33%
More/cheaper station parking	35%	26%
Fewer strikes or other industrial action	34%	23%
More frequent trains	32%	35%
Connections with other train services are always good	31%	38%
Accurate and timely information provided on trains	30%	39%
Good connections with other public transport at stations	29%	37%
More accessible stations and trains	27%	29%
Journey time is reduced	24%	31%
Improved personal security on board trains and at stations	24%	34%
Frequent bus service between where you live and station	23%	28%
More staff available to help passengers on trains and at stations	20%	31%

■ Very likely   ■ Fairly likely

Sample size **all lapsed passengers 2661**

Appendix – what matters by rail industry sector

Key priorities are largely consistent across the largest rail industry sectors – (London South East, long distance and regional), with some isolated differences – for example, getting a seat on a train is more important for long distance passengers than for others. See later table for details of the train operators making up each sector.

What matters to rail passengers by rail industry sector

	Great Britain		London South East		Long distance		Regional	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	2	211	1	220	1	225
Reliability and punctuality	2	213	1	213	2	207	2	224
Sufficiently frequent trains	3	148	3	152	5	136	3	161
Accurate and timely information about train times	4	143	4	144	4	138	5	147
Getting a seat on the train	5	143	7	135	3	159	4	150
My personal security on the train	6	136	5	137	7	130	6	137
Being kept informed about delays and the options I might have	7	135	6	137	6	132	7	135
My personal security at stations	8	118	8	120	8	111	8	117
Quick journey times	9	112	9	117	10	107	9	110
Inside of trains being clean and well-maintained	10	107	11	105	9	108	10	110
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	104	10	107	12	99	11	102
Easy to buy the right ticket	12	98	13	94	11	105	12	98
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	12	95	13	92	13	94
Good connections with other train services	14	81	15	84	16	77	15	77
Engineering works planned to keep passenger disruption to a minimum	15	80	14	85	17	75	16	75
Comfortable seats on trains	16	80	17	76	14	90	14	80
Good connections with other public transport at stations	17	76	16	79	18	71	18	71
Well-maintained, clean toilets on the train	18	75	18	72	15	81	17	74
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	61	19	59	19	55
Helpful staff at stations	20	56	21	55	20	56	20	54
Stations being clean and well-maintained	21	54	20	54	21	54	21	52
Helpful staff on trains	22	52	22	50	22	54	22	51
Reliable Wi-Fi and mobile reception on trains	23	44	23	44	23	49	23	37
Easy to claim compensation when delayed	24	40	24	40	25	44	24	34
Sufficient space on the train for luggage	25	36	25	33	24	45	25	31
Sample size:	12,565		6185		2813		2510	

Larger differences are observed among passengers using airport and open access operators. Those using airport train operating companies are more likely to consider personal security, communications during delays and the accessibility of the railway as important. Similarly, those using open access operators are more likely to prioritise communications during delays and the accessibility of the railway, as well as the ability to buy the right ticket.

What matters to rail passengers by rail industry sector

	All		Airport		Open access	
	Rank	**Index**	**Rank**	**Index**	**Rank**	**Index**
Price of train tickets offers value for money	**1**	**215**	1	152	1	198
Reliability and punctuality	**2**	**213**	2	151	2	183
Sufficiently frequent trains	**3**	**148**	9	108	7	118
Accurate and timely information about train times	**4**	**143**	6	119	5	131
Getting a seat on the train	**5**	**143**	7	114	4	136
My personal security on the train	**6**	**136**	3	130	6	128
Being kept informed about delays and the options I might have	**7**	**135**	4	126	3	142
My personal security at stations	**8**	**118**	5	121	8	113
Quick journey times	**9**	**112**	11	105	13	99
Inside of trains being clean and well-maintained	**10**	**107**	12	104	11	105
A railway that can cope with adverse weather events (snow, wind etc)	**11**	**104**	10	108	9	108
Easy to buy the right ticket	**12**	**98**	13	95	10	106
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	**13**	**94**	8	113	12	102
Good connections with other train services	**14**	**81**	15	93	15	85
Engineering works planned to keep passenger disruption to a minimum	**15**	**80**	17	91	14	86
Comfortable seats on trains	**16**	**80**	22	74	17	81
Good connections with other public transport at stations	**17**	**76**	14	94	18	80
Well-maintained, clean toilets on the train	**18**	**75**	16	93	16	84
An environmentally responsible railway that is reducing its carbon emissions	**19**	**60**	20	78	20	65
Helpful staff at stations	**20**	**56**	19	78	19	69
Stations being clean and well-maintained	**21**	**54**	23	72	22	64
Helpful staff on trains	**22**	**52**	21	75	21	64
Reliable Wi-Fi and mobile reception on trains	**23**	**44**	18	82	24	53
Easy to claim compensation when delayed	**24**	**40**	24	67	23	53
Sufficient space on the train for luggage	**25**	**36**	25	59	25	45
Sample size:	**12,565**		**154**		**211**	

Appendix – what matters by Network Rail region and route

What matters to passengers by Network Rail region and route

	Total		Eastern		East Anglia		East Coast		East Midlands		North East	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	1	223	1	217	1	225	1	226	1	226
Reliability and punctuality	2	213	2	214	2	216	2	212	2	210	2	219
Sufficiently frequent trains	3	148	3	146	3	151	4	140	5	142	4	151
Accurate and timely information about train times	4	143	5	144	4	145	5	139	4	145	5	146
Getting a seat on the train	5	143	4	144	7	131	3	152	3	146	3	156
My personal security on the train	6	136	6	137	5	141	7	132	6	140	7	135
Being kept informed about delays and the options I might have	7	135	7	137	6	141	6	133	7	134	6	138
My personal security at stations	8	118	8	119	8	124	8	113	8	122	8	116
Quick journey times	9	112	9	111	9	114	9	110	9	110	9	109
Inside of trains being clean and well-maintained	10	107	10	107	11	106	10	106	10	108	10	106
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	104	11	103	10	107	12	104	12	100	12	97
Easy to buy the right ticket	12	98	12	100	13	92	11	106	11	105	11	105
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	13	94	12	96	13	94	13	91	13	94
Good connections with other train services	14	81	14	81	15	88	15	79	15	78	16	76
Engineering works planned to keep passenger disruption to a minimum	15	80	15	81	14	90	16	77	17	74	15	76
Comfortable seats on trains	16	80	16	80	17	72	14	86	14	82	14	84
Good connections with other public transport at stations	17	76	17	75	16	83	18	73	18	72	18	68
Well-maintained, clean toilets on the train	18	75	18	74	18	70	17	76	16	76	17	75
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	56	19	58	20	55	19	61	21	51
Helpful staff at stations	20	56	20	54	21	52	19	56	21	53	19	55
Stations being clean and well-maintained	21	54	21	53	20	53	22	52	20	54	22	51
Helpful staff on trains	22	52	22	50	22	47	21	53	22	50	20	52
Reliable Wi-Fi and mobile reception on trains	23	44	24	41	24	38	24	43	23	44	24	39
Easy to claim compensation when delayed	24	40	23	41	23	39	23	43	24	42	23	42
Sufficient space on the train for luggage	25	36	25	35	25	29	25	41	25	37	25	36
Sample size:	12,565		3969		1215		1213		767		781	

What matters to passengers by Network Rail region and route

	Total		North West & Central		Central		North West		West Coast	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	2	210	2	207	2	213	2	206
Reliability and punctuality	2	213	1	211	1	208	1	214	1	209
Sufficiently frequent trains	3	148	3	148	4	145	3	151	4	146
Accurate and timely information about train times	4	143	5	144	3	145	5	144	6	141
Getting a seat on the train	5	143	4	144	7	135	4	147	3	152
My personal security on the train	6	136	6	142	5	144	6	141	5	141
Being kept informed about delays and the options I might have	7	135	7	137	6	140	7	137	7	131
My personal security at stations	8	118	8	124	8	126	8	123	8	122
Quick journey times	9	112	9	112	9	109	9	111	9	119
Inside of trains being clean and well-maintained	10	107	10	105	11	104	10	104	10	105
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	104	11	101	10	108	11	100	13	95
Easy to buy the right ticket	12	98	13	97	13	98	12	96	12	96
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	12	97	12	101	13	95	11	96
Good connections with other train services	14	81	14	80	15	80	15	80	15	81
Engineering works planned to keep passenger disruption to a minimum	15	80	16	79	14	81	14	81	18	73
Comfortable seats on trains	16	80	15	79	16	77	16	79	14	82
Good connections with other public transport at stations	17	76	17	74	17	75	17	73	16	76
Well-maintained, clean toilets on the train	18	75	18	72	18	69	18	72	17	75
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	59	19	62	20	56	19	61
Helpful staff at stations	20	56	20	56	20	57	19	57	20	56
Stations being clean and well-maintained	21	54	21	53	21	54	22	51	21	55
Helpful staff on trains	22	52	22	52	22	52	21	54	22	51
Reliable Wi-Fi and mobile reception on trains	23	44	23	46	23	46	23	45	23	49
Easy to claim compensation when delayed	24	40	24	40	24	39	24	40	24	43
Sufficient space on the train for luggage	25	36	25	37	25	36	25	38	25	38
Sample size:	12,565		2996		960		1488		536	

What matters to passengers by Network Rail region and route

	Total		Southern		Kent		Network Rail High Speed		Sussex		Wessex	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	2	208	2	197	2	212	2	197	2	221
Reliability and punctuality	2	213	1	214	1	207	1	218	1	206	1	221
Sufficiently frequent trains	3	148	3	154	3	150	4	150	3	155	3	154
Accurate and timely information about train times	4	143	4	145	4	144	3	162	4	143	5	144
Getting a seat on the train	5	143	7	131	8	118	10	109	8	122	4	145
My personal security on the train	6	136	6	136	5	144	6	140	6	133	7	132
Being kept informed about delays and the options I might have	7	135	5	137	6	138	5	145	5	139	6	133
My personal security at stations	8	118	9	119	7	128	7	124	9	117	9	114
Quick journey times	9	112	8	120	9	117	8	123	7	124	8	119
Inside of trains being clean and well-maintained	10	107	11	105	11	104	9	111	11	102	10	108
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	104	10	108	10	110	12	94	10	114	11	103
Easy to buy the right ticket	12	98	12	95	12	97	11	105	14	90	12	97
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	13	92	13	94	15	79	12	97	13	89
Good connections with other train services	14	81	15	86	14	89	13	92	13	91	15	82
Engineering works planned to keep passenger disruption to a minimum	15	80	14	86	15	88	18	71	16	88	14	84
Comfortable seats on trains	16	80	17	74	18	68	17	73	18	70	16	80
Good connections with other public transport at stations	17	76	16	81	16	84	14	84	15	89	17	76
Well-maintained, clean toilets on the train	18	75	18	72	17	72	16	76	17	72	18	74
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	60	19	63	21	57	19	68	19	56
Helpful staff at stations	20	56	21	55	20	58	20	57	21	54	20	53
Stations being clean and well-maintained	21	54	20	55	21	58	19	60	20	57	21	53
Helpful staff on trains	22	52	22	50	22	53	22	53	22	49	22	49
Reliable Wi-Fi and mobile reception on trains	23	44	23	43	23	42	23	40	23	45	23	44
Easy to claim compensation when delayed	24	40	24	40	24	42	24	34	24	44	24	38
Sufficient space on the train for luggage	25	36	25	33	25	34	25	30	25	35	25	33
Sample size:	12,565		2670		901		93		821		1054	

What matters to passengers by Network Rail region and route

	Total		Scotland's Railway		Wales & Western		Wales		Western	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	215	1	222	1	218	1	217	1	219
Reliability and punctuality	2	213	2	214	2	213	2	209	2	215
Sufficiently frequent trains	3	148	3	153	4	146	4	146	4	146
Accurate and timely information about train times	4	143	5	140	5	141	5	141	5	141
Getting a seat on the train	5	143	4	153	3	154	3	154	3	154
My personal security on the train	6	136	6	130	7	130	7	130	7	129
Being kept informed about delays and the options I might have	7	135	7	127	6	133	6	131	6	135
My personal security at stations	8	118	9	111	8	112	9	112	8	111
Quick journey times	9	112	10	109	10	105	11	100	9	109
Inside of trains being clean and well-maintained	10	107	8	114	9	109	8	114	10	106
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	104	11	106	12	99	12	93	11	102
Easy to buy the right ticket	12	98	12	96	11	101	10	102	12	101
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	13	95	13	94	13	91	13	95
Good connections with other train services	14	81	16	75	15	79	16	79	15	79
Engineering works planned to keep passenger disruption to a minimum	15	80	17	73	17	77	17	75	16	78
Comfortable seats on trains	16	80	14	87	14	85	14	88	14	84
Good connections with other public transport at stations	17	76	18	70	18	73	18	71	18	74
Well-maintained, clean toilets on the train	18	75	15	83	16	79	15	85	17	75
An environmentally responsible railway that is reducing its carbon emissions	19	60	19	61	19	64	19	63	19	65
Helpful staff at stations	20	56	20	57	20	57	20	60	20	56
Stations being clean and well-maintained	21	54	21	56	21	55	21	59	21	53
Helpful staff on trains	22	52	22	55	22	54	22	57	22	53
Reliable Wi-Fi and mobile reception on trains	23	44	23	46	23	46	23	46	23	46
Easy to claim compensation when delayed	24	40	24	34	24	39	25	39	24	39
Sufficient space on the train for luggage	25	36	25	35	25	38	24	40	25	36
Sample size:	12,565		1033		1762		640		1122	

Appendix – what matters by train company

This table shows what matters to passengers of specific train companies, grouped by the rail industry sector.

Results are only presented for those rail companies where more than 50 passengers participated in the research.

What matters to rail passengers by rail industry sector and train company

London and South East	London and South East Total		c2c		Chiltern Railways		Elizabeth Line (TfL Rail)		Great Western Railway	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	2	211	2	177	1	190	2	168	1	226
Reliability and punctuality	1	213	1	194	2	180	1	180	2	219
Sufficiently frequent trains	3	152	4	145	5	139	3	143	4	146
Accurate and timely information about train times	4	144	5	141	4	139	4	137	5	142
Getting a seat on the train	7	135	9	110	6	127	10	108	3	162
My personal security on the train	5	137	3	151	7	123	6	135	7	133
Being kept informed about delays and the options I might have	6	137	6	138	3	141	5	135	6	135
My personal security at stations	8	120	7	136	9	109	8	122	8	113
Quick journey times	9	117	8	114	8	110	7	123	10	107
Inside of trains being clean and well-maintained	11	105	10	105	10	105	14	101	9	109
A railway that can cope with adverse weather events (snow, wind etc)	10	107	12	103	11	103	9	119	12	98
Easy to buy the right ticket	13	94	13	95	12	101	16	80	11	100
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	12	95	11	103	13	100	11	105	13	93
Good connections with other train services	15	84	16	86	14	93	12	102	17	76
Engineering works planned to keep passenger disruption to a minimum	14	85	14	94	15	90	15	92	16	77
Comfortable seats on trains	17	76	18	69	17	77	19	73	14	87
Good connections with other public transport at stations	16	79	15	86	16	88	13	102	18	68
Well-maintained, clean toilets on the train	18	72	17	75	18	75	18	74	15	78
An environmentally responsible railway that is reducing its carbon emissions	19	61	19	67	19	72	17	78	19	58
Helpful staff at stations	20	55	21	59	20	64	21	59	20	57
Stations being clean and well-maintained	21	54	20	62	21	62	20	64	22	52
Helpful staff on trains	22	50	23	53	23	58	22	54	21	54
Reliable Wi-Fi and mobile reception on trains	23	44	22	55	22	60	23	54	23	40
Easy to claim compensation when delayed	24	40	25	41	24	49	24	49	24	37
Sufficient space on the train for luggage	25	33	24	42	25	45	25	45	25	34
Sample size:	6,185		259		255		310		1116	

What matters to rail passengers by rail industry sector and train company

London and South East	London and South East Total		Greater Anglia		London Northwestern Railway		London Overground		South Western Railway	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	2	211	1	236	1	201	2	173	2	223
Reliability and punctuality	1	213	2	221	2	201	1	191	1	228
Sufficiently frequent trains	3	152	3	154	4	143	4	140	3	160
Accurate and timely information about train times	4	144	4	142	5	141	5	139	4	148
Getting a seat on the train	7	135	5	139	3	144	14	98	5	146
My personal security on the train	5	137	6	136	7	129	3	147	7	132
Being kept informed about delays and the options I might have	6	137	7	135	6	131	6	138	6	134
My personal security at stations	8	120	8	118	10	112	7	133	9	114
Quick journey times	9	117	9	115	9	113	8	118	8	121
Inside of trains being clean and well-maintained	11	105	10	108	13	95	11	102	10	104
A railway that can cope with adverse weather events (snow, wind etc)	10	107	11	105	8	114	9	114	11	104
Easy to buy the right ticket	13	94	12	96	11	103	16	88	12	91
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	12	95	13	93	12	100	10	112	13	90
Good connections with other train services	15	84	15	83	16	75	13	100	15	80
Engineering works planned to keep passenger disruption to a minimum	14	85	14	91	14	85	15	90	14	85
Comfortable seats on trains	17	76	17	75	15	82	20	61	16	76
Good connections with other public transport at stations	16	79	16	77	19	70	12	101	17	73
Well-maintained, clean toilets on the train	18	72	18	74	17	71	18	70	18	69
An environmentally responsible railway that is reducing its carbon emissions	19	61	19	55	18	71	17	73	19	57
Helpful staff at stations	20	55	20	52	21	56	21	58	20	52
Stations being clean and well-maintained	21	54	21	50	22	55	19	65	21	51
Helpful staff on trains	22	50	22	47	23	52	22	52	22	47
Reliable Wi-Fi and mobile reception on trains	23	44	24	35	20	67	24	47	23	45
Easy to claim compensation when delayed	24	40	23	38	24	51	23	48	24	39
Sufficient space on the train for luggage	25	33	25	25	25	39	25	41	25	31
Sample size:	6185		620		146		481		790	

What matters to rail passengers by rail industry sector and train company

London and South East	London and South East Total		Southeastern		Southern		Thameslink		West Midlands Railway	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	2	211	2	221	2	225	2	213	2	200
Reliability and punctuality	1	213	1	228	1	230	1	227	1	205
Sufficiently frequent trains	3	152	3	162	3	170	3	163	3	144
Accurate and timely information about train times	4	144	4	150	4	151	4	154	5	141
Getting a seat on the train	7	135	7	134	5	144	8	123	7	129
My personal security on the train	5	137	5	146	7	133	6	135	4	142
Being kept informed about delays and the options I might have	6	137	6	138	6	140	5	145	6	134
My personal security at stations	8	120	8	127	10	113	9	118	8	126
Quick journey times	9	117	9	123	8	129	7	126	9	112
Inside of trains being clean and well-maintained	11	105	10	106	11	100	11	102	11	105
A railway that can cope with adverse weather events (snow, wind etc)	10	107	11	105	9	113	10	117	10	107
Easy to buy the right ticket	13	94	12	96	12	93	14	88	13	99
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	12	95	13	89	14	85	13	89	12	101
Good connections with other train services	15	84	15	81	15	83	12	89	14	80
Engineering works planned to keep passenger disruption to a minimum	14	85	14	84	13	86	15	87	16	77
Comfortable seats on trains	17	76	17	69	16	79	17	69	15	77
Good connections with other public transport at stations	16	79	16	74	17	77	16	82	17	76
Well-maintained, clean toilets on the train	18	72	18	68	18	67	18	68	18	72
An environmentally responsible railway that is reducing its carbon emissions	19	61	19	56	19	53	19	52	19	69
Helpful staff at stations	20	55	20	52	20	47	21	47	20	58
Stations being clean and well-maintained	21	54	21	51	21	46	20	50	21	58
Helpful staff on trains	22	50	22	47	22	43	23	42	22	54
Reliable Wi-Fi and mobile reception on trains	23	44	23	38	24	33	24	41	23	51
Easy to claim compensation when delayed	24	40	24	32	23	34	22	43	24	42
Sufficient space on the train for luggage	25	33	25	23	25	26	25	29	25	39
Sample size:	6185		724		464		385		575	

What matters to rail passengers by rail industry sector and train company

Long distance	Long distance Total		Avanti West Coast		CrossCountry		East Midlands Railway		London North Eastern Railway		TransPennine Express	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	220	1	220	1	205	1	218	1	236	1	230
Reliability and punctuality	2	207	2	209	2	196	2	199	2	217	2	225
Sufficiently frequent trains	5	136	4	142	6	131	7	131	4	133	5	151
Accurate and timely information about train times	4	138	5	134	4	140	4	141	5	132	4	151
Getting a seat on the train	3	159	3	169	3	148	3	147	3	173	3	157
My personal security on the train	7	130	7	127	7	125	5	135	6	129	7	135
Being kept informed about delays and the options I might have	6	132	6	129	5	135	6	135	7	125	6	141
My personal security at stations	8	111	9	108	8	109	8	118	10	108	8	114
Quick journey times	10	107	8	114	11	104	11	103	11	107	9	108
Inside of trains being clean and well-maintained	9	108	10	106	10	105	9	111	9	110	11	105
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	12	99	12	98	13	90	12	98	12	101	10	105
Easy to buy the right ticket	11	105	11	99	9	107	10	110	8	112	12	98
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	92	14	84	12	104	13	95	14	89	13	91
Good connections with other train services	16	77	15	81	15	84	16	77	16	71	17	72
Engineering works planned to keep passenger disruption to a minimum	17	75	17	77	18	75	17	74	17	71	15	78
Comfortable seats on trains	14	90	13	94	14	86	14	86	13	99	14	82
Good connections with other public transport at stations	18	71	18	72	17	79	18	73	18	63	18	65
Well-maintained, clean toilets on the train	15	81	16	81	16	83	15	80	15	82	16	72
An environmentally responsible railway that is reducing its carbon emissions	19	59	19	55	21	59	19	66	20	54	20	52
Helpful staff at stations	20	56	20	53	19	61	21	58	19	54	19	55
Stations being clean and well-maintained	21	54	23	51	22	58	20	59	22	50	22	48
Helpful staff on trains	22	54	22	51	20	60	22	54	21	52	21	51
Reliable Wi-Fi and mobile reception on trains	23	49	21	56	23	56	23	45	23	45	23	39
Easy to claim compensation when delayed	25	44	24	45	25	48	24	45	25	41	24	38
Sufficient space on the train for luggage	24	45	25	44	24	51	25	43	24	44	25	37
Sample size:	2813		691		359		723		606		374	

What matters to rail passengers by rail industry sector and train company

Regional	Regional Total		Merseyrail		Northern		ScotRail		Transport for Wales	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers value for money	1	225	2	202	1	228	1	228	1	226
Reliability and punctuality	2	224	1	219	2	227	2	223	2	219
Sufficiently frequent trains	3	161	4	159	3	165	3	161	4	153
Accurate and timely information about train times	5	147	6	145	4	151	5	145	5	147
Getting a seat on the train	4	150	8	125	5	149	4	154	3	156
My personal security on the train	6	137	3	174	7	134	6	134	7	128
Being kept informed about delays and the options I might have	7	135	7	131	6	141	7	130	6	135
My personal security at stations	8	117	5	156	8	115	9	113	9	109
Quick journey times	9	110	10	107	9	113	10	110	10	101
Inside of trains being clean and well-maintained	10	110	12	105	10	104	8	114	8	117
A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)	11	102	11	106	12	98	11	107	12	94
Easy to buy the right ticket	12	98	13	94	11	102	12	96	11	98
Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.	13	94	9	112	13	89	13	95	13	89
Good connections with other train services	15	77	15	78	14	80	16	72	15	82
Engineering works planned to keep passenger disruption to a minimum	16	75	14	82	15	78	17	72	18	69
Comfortable seats on trains	14	80	18	66	16	77	14	83	14	87
Good connections with other public transport at stations	18	71	16	70	17	73	18	67	17	74
Well-maintained, clean toilets on the train	17	74	17	69	18	67	15	80	16	79
An environmentally responsible railway that is reducing its carbon emissions	19	55	20	53	20	51	19	57	19	62
Helpful staff at stations	20	54	19	60	19	52	20	54	21	54
Stations being clean and well-maintained	21	52	22	52	22	49	21	53	20	57
Helpful staff on trains	22	51	21	53	21	50	22	51	22	51
Reliable Wi-Fi and mobile reception on trains	23	37	23	30	24	36	23	40	23	39
Easy to claim compensation when delayed	24	34	24	26	23	38	25	29	24	39
Sufficient space on the train for luggage	25	31	25	26	25	33	24	30	25	37
Sample size:	2510		259		1104		811		336	

Appendix: methodology

Research approach

15,226 online interviews were completed with rail passengers in Great Britain. Fieldwork took place from 11 – 24 August 2022. This was soon after the end of a heatwave in Britain, with temperatures well above 30°C during the middle of July. During the heatwave, rail services were disrupted, with restricted timetables and speed restrictions on some lines. This was on top of severe storms earlier in the year and is worth noting because within the survey we ask about how important it is that the railway 'can cope with adverse weather events for example snow, wind, flooding and extreme heat'. Overall, this ranked eleventh in importance to passengers out of the 25 features tested. While it is possible that the timing of the research could have impacted the ranking of this factor, it is worth noting that it also ranked eleventh and twelfth in Scotland and Wales respectively, where the impact of the heatwave was less extreme.

Of the 15,226 interviews, 12,565 were with current passengers who have travelled by rail in the past 12 months. The remaining 2661 were with lapsed passengers who had not travelled in the previous 12 months, but had done so prior to that (see the lower table for details) – they completed only a small part of the survey, such as why they have stopped travelling by rail and what might encourage them back.

All passengers		Interviews
Current passengers	Travelled in last 3 months	10,179
	Travelled in last 4 – 12 months	2386
Lapsed travellers	Travelled during 2019 to July 2021	2661
All		**15,226**

Among current passengers, we identified the purpose of their journeys and asked many of the subsequent questions about just one of those journey types which they make most frequently. Obviously, many travellers use rail for multiple purposes.

In these instances the journey purpose we asked about was chosen on a 'least full' basis thereby ensuring that we completed a similar proportion of interviews for each type of journey (see below for sample sizes).

The research also made use of the Ipsos MORI telephone omnibus survey to understand the nationally representative demographic profile of those who had travelled by train in the past 12 months. Based on this data quotas were set by age, sex, social grade, region and recency of travel (past three months, 4-12 months, over 12 months). Using the same profile characteristics, the final data in this report was weighted to take account of minor differences compared with the omnibus survey data.

Current passengers		Interviews
Commuter	Travelling to and from work or place of education	2329
Business	Travelling for work	2323
Leisure	Travel for enjoyment, for example visiting friends/ relatives, shopping, holidays, day trips, for sport etc.	5576
Personal business	Travel for medical appointments, job interviews, banking etc.	2337
All current passengers		**12,565**

Using MaxDiff to measure what matters to passengers

What is MaxDiff?

Maximum Difference Scaling (MaxDiff) is a way of evaluating the importance (or preference) of a number of alternatives. It is a discrete choice technique: respondents are asked to make simple best/worst choices.

How does it work?

When undertaking the MaxDiff exercise, we asked participants to think about their most frequent journey by train for a specific purpose; a journey for commuting, business, leisure or personal business.

Participants completed a series of exercises. Each time they were shown five options and asked which were most and least important to them when travelling by rail for their specific journey. This was repeated 15 times, with different combinations of features.

This table lists the 25 features of the railway included in the MaxDiff exercise. The results allow us to understand what matters most to rail passengers in Britain.

	Features of the railway (listed alphabetically)
1	A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)
2	Accurate and timely information about train times
3	An environmentally responsible railway that is reducing its carbon emissions
4	Being kept informed about delays and the options I might have
5	Comfortable seats on trains
6	Easy to buy the right ticket
7	Easy to claim compensation when delayed
8	Engineering works planned to keep passenger disruption to a minimum
9	Getting a seat on the train
10	Good connections with other public transport at stations
11	Good connections with other train services
12	Helpful staff at stations
13	Helpful staff on trains
14	Inside of trains being clean and well-maintained
15	My personal security at stations
16	My personal security on the train
17	Price of train tickets offers value for money
18	Quick journey times
19	Reliability and punctuality
20	Reliable Wi-Fi and mobile reception on trains
21	Stations being clean and well-maintained
22	Sufficient space on the train for luggage
23	Sufficiently frequent trains
24	Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage
25	Well-maintained, clean toilets on the train

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name of the Passengers' Council

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- rail passengers in Great Britain
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