BRITAIN'S RAILWAY – WHAT MATTERS TO PASSENGERS

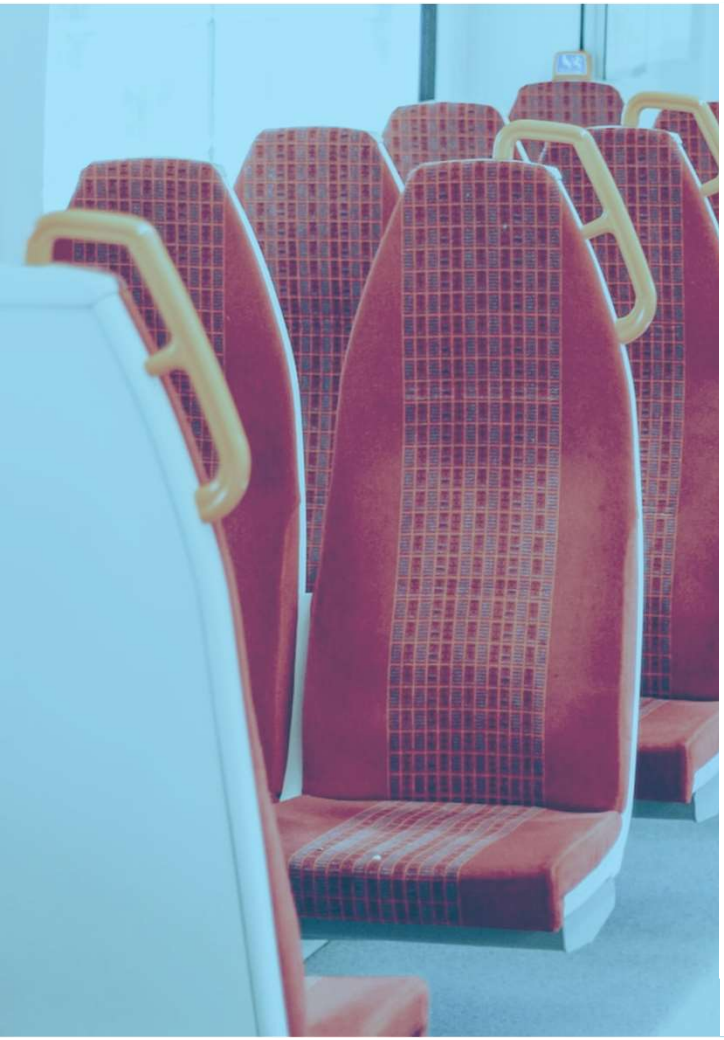
quadrangle

A RESEARCH STUDY CONDUCTED FOR TRANSPORT FOCUS AND NETWORK RAIL

FINAL REPORT – DECEMBER 2022

© Quadrangle 2022

TABLE OF CONTENTS



	Page
Research goals, the approach and profile of passengers by journey purpose	3-5
Headline findings	6-8
What matters to passengers – key findings	9-17
Deep Dive – Reliability and Punctuality	18-25
Deep Dive – Environment/Sustainability	26-31
Deep Dive – Managing planned disruption	32-39
Deep Dive – Accessibility	40-47
Lapsed passengers	48-54
What matters to passengers – detailed analysis	
by nation (including infographics)	56-61
by demographic groups	62-68
by journey purpose	69-75
by other influences	76-86
by Network Rail regions and routes	87-92
by train operator (TOC)	93-99
Importance versus performance by TOC	100-122
Appendix	
Methodology	123-126

© Quadrangle 2022

quadrangle

> To update our understanding of passengers' expectations of the railway post-pandemic and to explore how changes in working patterns and travel behaviours may have impacted these

RESEARCH THEMES

- Overall attitudes towards the railway and expectations for the future railway
- Measuring what matters to passengers when it comes to the railway and 'green issues', sustainability, decarbonisation etc.
- Exploring the impact of the changing working environment (e.g. hybrid working) on passenger attitudes and needs
- Understanding train passenger attitudes towards the least bad times for planned disruption
- Understanding passenger preferences for rail investment in a financially constrained world e.g. reliability versus more trains
- Assessing passenger expectations for a more accessible railway
- Providing detailed analysis of how opinions vary between multiple factors including journey purpose, nations, the Network Rail regions and routes, train operators and demographic sub-groups
- Exploring the attitudes of lapsed passengers and what is likely to have the greatest influence on them returning to rail

© Quadrangle 2022

THE APPROACH

A MAJOR QUANTITATIVE SURVEY INVOLVING MORE THAN 15,000 ONLINE INTERVIEWS

- 20-minute online survey among rail passengers
- Fieldwork between 11th – 24th August 2022
- Data weighted to proportions set by nationally representative CATI omnibus carried out in August 2022 (2,000 interviews)
- Participants asked about one of their more frequently undertaken journey types on a “least full” basis (obviously many travellers use the rail for multiple purposes) (see opposite)

ALL PASSENGERS	WEIGHTED %	INTERVIEWS
Travelled in last 3 months	64	10,179
Travelled in last 4 – 12 months	20	2,386
Lapsed Travellers	16	2,661
Total		**15,226**

CURRENT PASSENGERS	WEIGHTED%	INTERVIEWS
Commuter	19	2,329
Business	19	2,323
Leisure	44	5,576
Personal Business	19	2,337
All current passengers		**12,565**

PROFILES OF TRAVELLERS BY JOURNEY PURPOSE

quadrangle

	Commuters	Business travellers	Leisure	Personal Business
	Travel to and from work or place of education	Travel for work	Travel to visit friends/relatives, shopping, holidays, day trips, for sport, etc	Travel by train for medical appointments, job interviews, banking, etc
Passengers are more likely than average to be:	**Under 44 yrs old** **From an Ethnic minority** **Recent passengers** **Travelling alone**	**Male passengers** **AB socio-economic group** **Under 44 years old** **Recent passengers** **Standard Premium and First Class** **Bicycle users** **To use technology on trains**	**Female passengers** **Over 55 years old** **White British** **Non-recent passengers** **Able-bodied passengers** **Travel by car to the station**	**Male passengers** **Under 44 yrs old** **Recent passengers** **People with a disability**

TL
0014
BR
TL
0015
BR
15
455
803

quadrangle

01

Most important for passengers – well ahead of other factors – are value for money, and the reliability and punctuality of services

Regardless of the type of passenger, these two areas are almost universally regarded as the most important when travelling by train. Improved value for money is also the feature which passengers are most likely to say would lead to an increase in the amount that they travel by train

02

What matters to passengers is impacted by the purpose of their journey – for example, if they are travelling for leisure or on a business trip

Leisure passengers tend to have more focussed priorities – value for money, reliability and getting a seat on a train. While business travellers have more varied requirements of the railway, with greater emphasis placed on, for example, good connections with other services, quick journeys and reliable Wi-Fi on trains

03

Age strongly influences what matters to customers. The young are more focussed on the environmental impact of the railway and accessibility. And whilst older people are concerned with accessibility, they also place greater importance on value for money, reliability and getting a (comfortable) a seat

Other strong influences on passenger expectations include gender, journey length, and people's ability to work from home

04

Disabled passengers or those travelling with luggage, personal transportation, dogs and helpers have expectations which align with their needs

For example, those who travel in a wheelchair or mobility scooter rank accessibility of the railway as their number one priority. Around one-quarter of those passengers with a mobility issue rate the ability to get on and off trains, and move around trains, as poor

© Quadrangle 2022

quadrangle

05

Sundays are considered to be the least disruptive day of the week for railway engineering works. For longer-term work, a full one-week closure is slightly preferred to six consecutive weekends

Mondays and Fridays are considered the *least* favourable for planned works

06

The ability for the railway to cope with adverse weather is the most important environmental concern among rail passengers

More than half of passengers think this is very important for the railway to invest in. Across a range of environmental topics, young people consistently think that these are more important than older people

07

Cheaper fares are the most significant factor in encouraging lapsed passengers back to the railway

At the same time, the changing workplace, and in particular the growth in home and hybrid-working, has pushed some commuters away from such frequent use of the train

© Quadrangle 2022

WHAT MATTERS TO PASSENGERS – MAIN FINDINGS

THREE STEPS

quadrangle

PASSENGERS WERE ASKED ABOUT A JOURNEY WHICH THEY MAKE FREQUENTLY FOR COMMUTING, BUSINESS, LEISURE OR PERSONAL BUSINESS

01

Ranking 25 specific features of their train journey using a MaxDiff trade-off exercise

02

Satisfaction with the same 25 features

03

Likelihood to travel by rail more if improvements are made to their seven most important features

WHAT MATTERS TO PASSENGERS – INTRODUCING THE 25 FEATURES TESTED

quadrangle

The central pillar of this study is to understand **what is most important to passengers when travelling by train**.

To do this, we used a list of 25 features linked to rail travel.

These were chosen to cover many different aspects that passengers might consider when travelling by train, and broadly encompass the following topics:

Reliability, punctuality, journey times and information

Experience on the train

Experience at the station

Value for money and tickets

Environment and sustainability

Using a trade-off exercise known as MaxDiff, we have been able to rank the order and relative importance of these features to passengers. Please see the appendix for further detail.

Railway features addressed in this research (listed alphabetically)

1	A railway that can cope with adverse weather events*
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**
25	Well-maintained, clean toilets on the train

Expectations exact wording

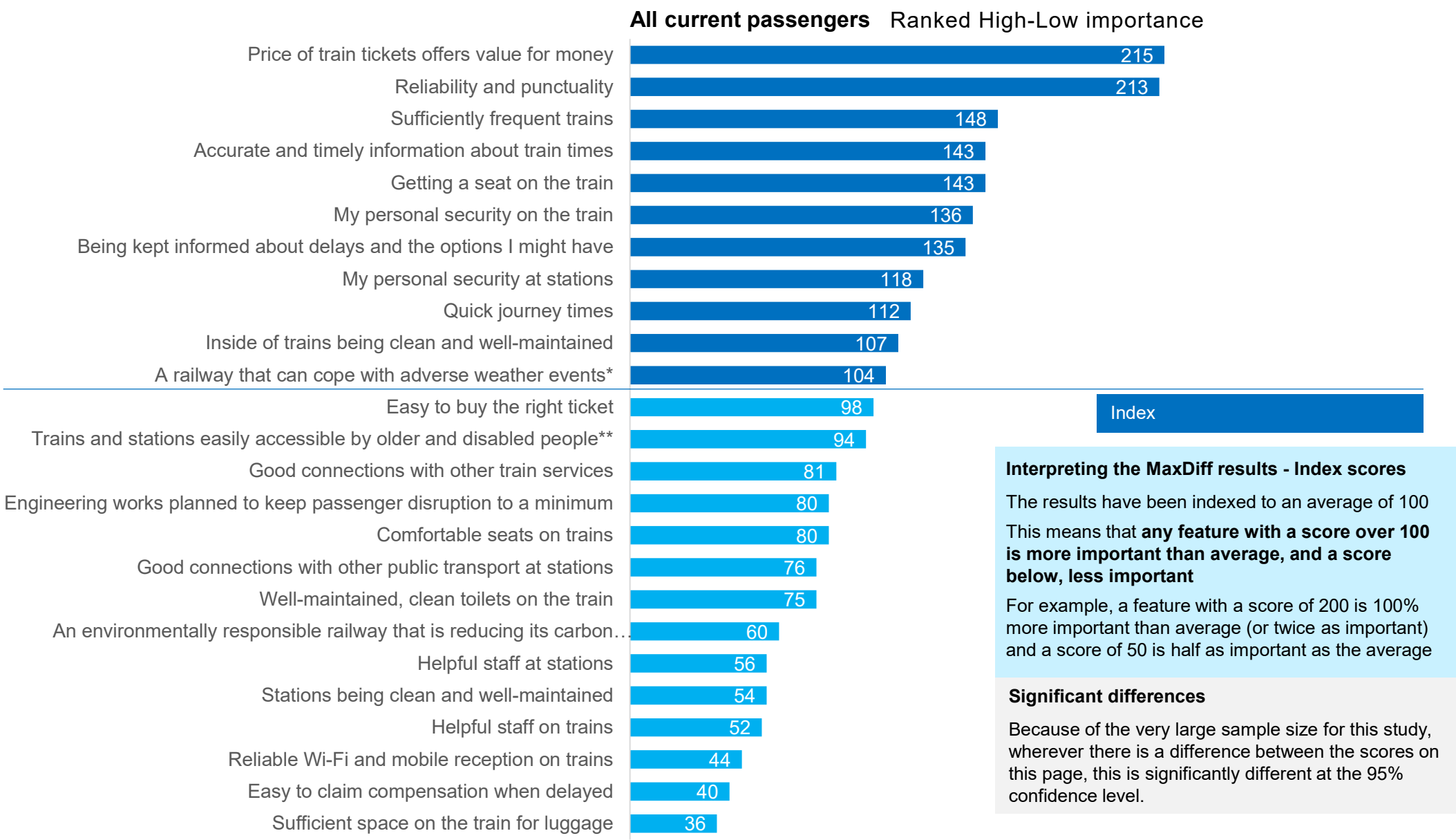
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

WHAT MATTERS TO PASSENGERS – HOW TO READ AND INTERPRET THE RESULTS

quadrangle



Interpreting the MaxDiff results - Index scores

The results have been indexed to an average of 100

This means that **any feature with a score over 100 is more important than average, and a score below, less important**

For example, a feature with a score of 200 is 100% more important than average (or twice as important) and a score of 50 is half as important as the average

Significant differences

Because of the very large sample size for this study, wherever there is a difference between the scores on this page, this is significantly different at the 95% confidence level.

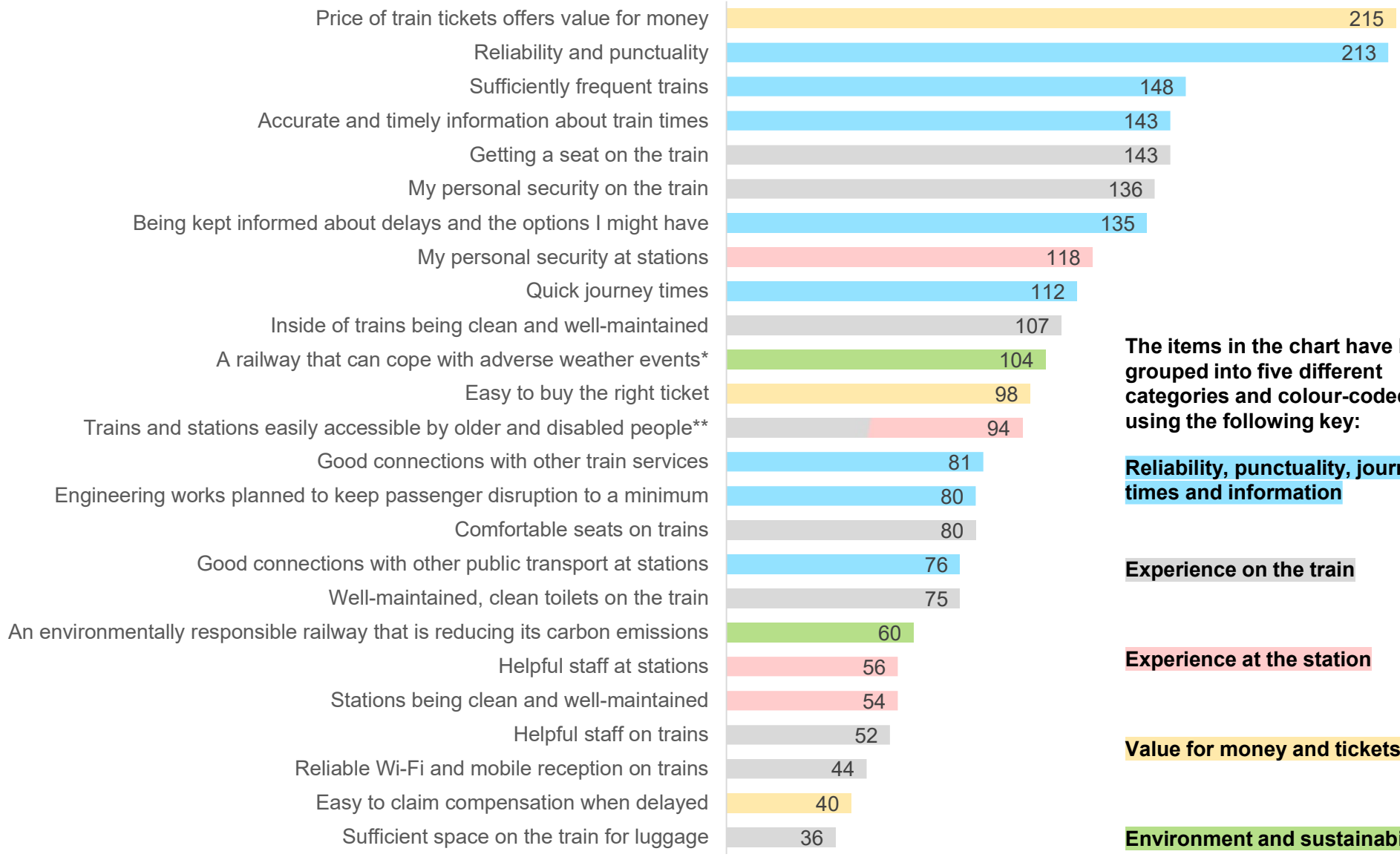
MXD1 Please tell us which of the items are most important to you when travelling by train.
Base: All current passengers (n=12,565)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

VALUE FOR MONEY AND RELIABILITY AND PUNCTUALITY ARE MOST IMPORTANT TO PASSENGERS, FOLLOWED BY SUFFICIENTLY FREQUENT TRAINS, RECEIVING ACCURATE INFORMATION AND GETTING A SEAT

quadrangle

All current passengers Ranked High-Low importance



The items in the chart have been grouped into five different categories and colour-coded using the following key:

Reliability, punctuality, journey times and information

Experience on the train

Experience at the station

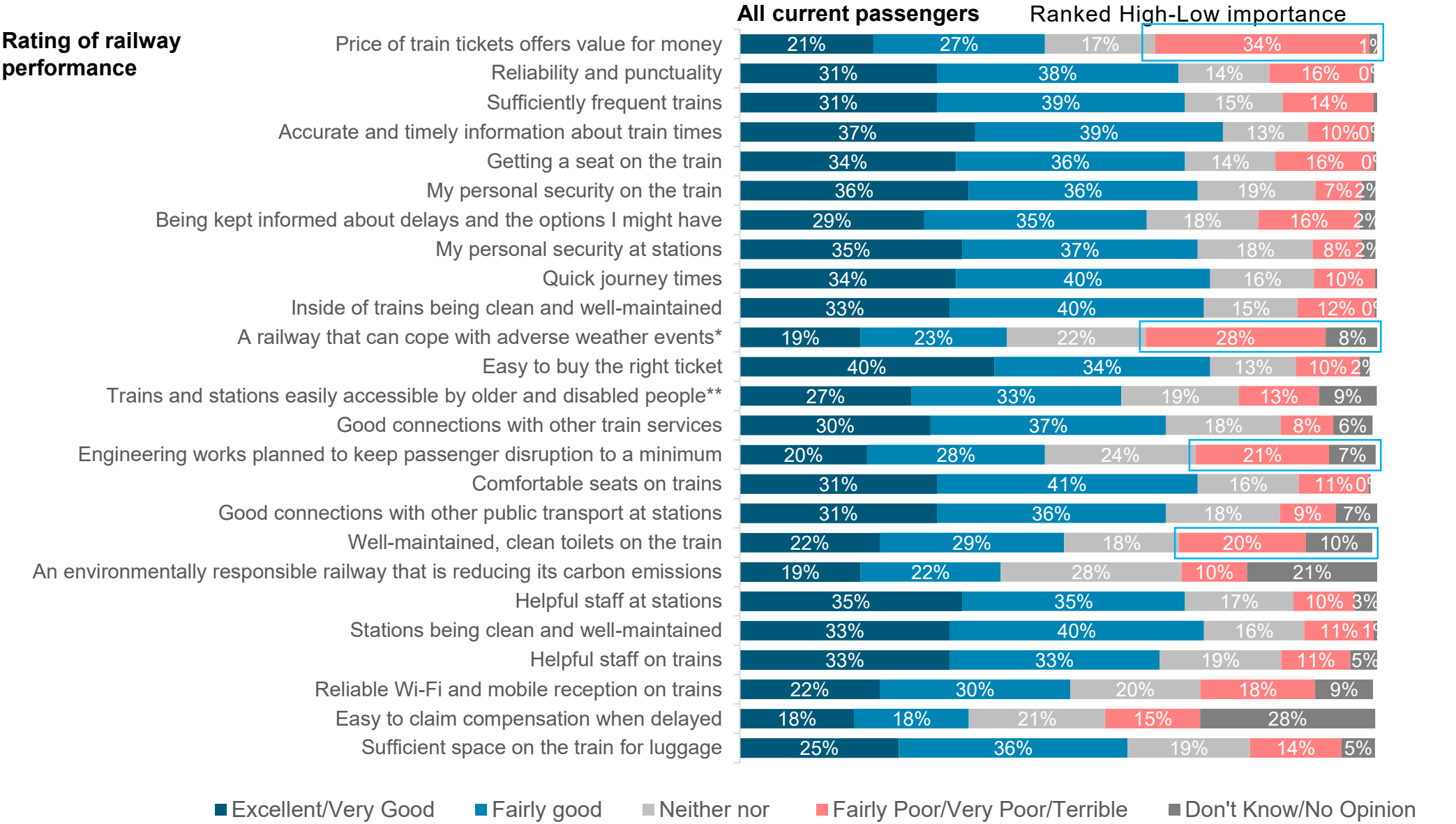
Value for money and tickets

Environment and sustainability

MXD1 Please tell us which of the items are most important to you when travelling by train.
Base: All current passengers (n=12,565)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

CURRENT PASSENGERS RATED THE PERFORMANCE OF THE RAILWAY ON THE SAME 25 FEATURES TESTED FOR THEIR IMPORTANCE. THE VALUE FOR MONEY OF TRAIN TICKETS IS OF GREATEST IMPORTANCE AND MOST LIKELY TO BE RATED POORLY



© Quadrangle 2022

QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All current passengers (n=12,565)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IDENTIFYING WHAT MATTERS

This report features charts which illustrate the relationship between what is most important to passengers and how the railway performs against these criteria

quadrangle

Importance

The results of the MaxDiff exercise for each of the 25 features.

The vertical line at 4% represents the average score across the 25 features.

Performance

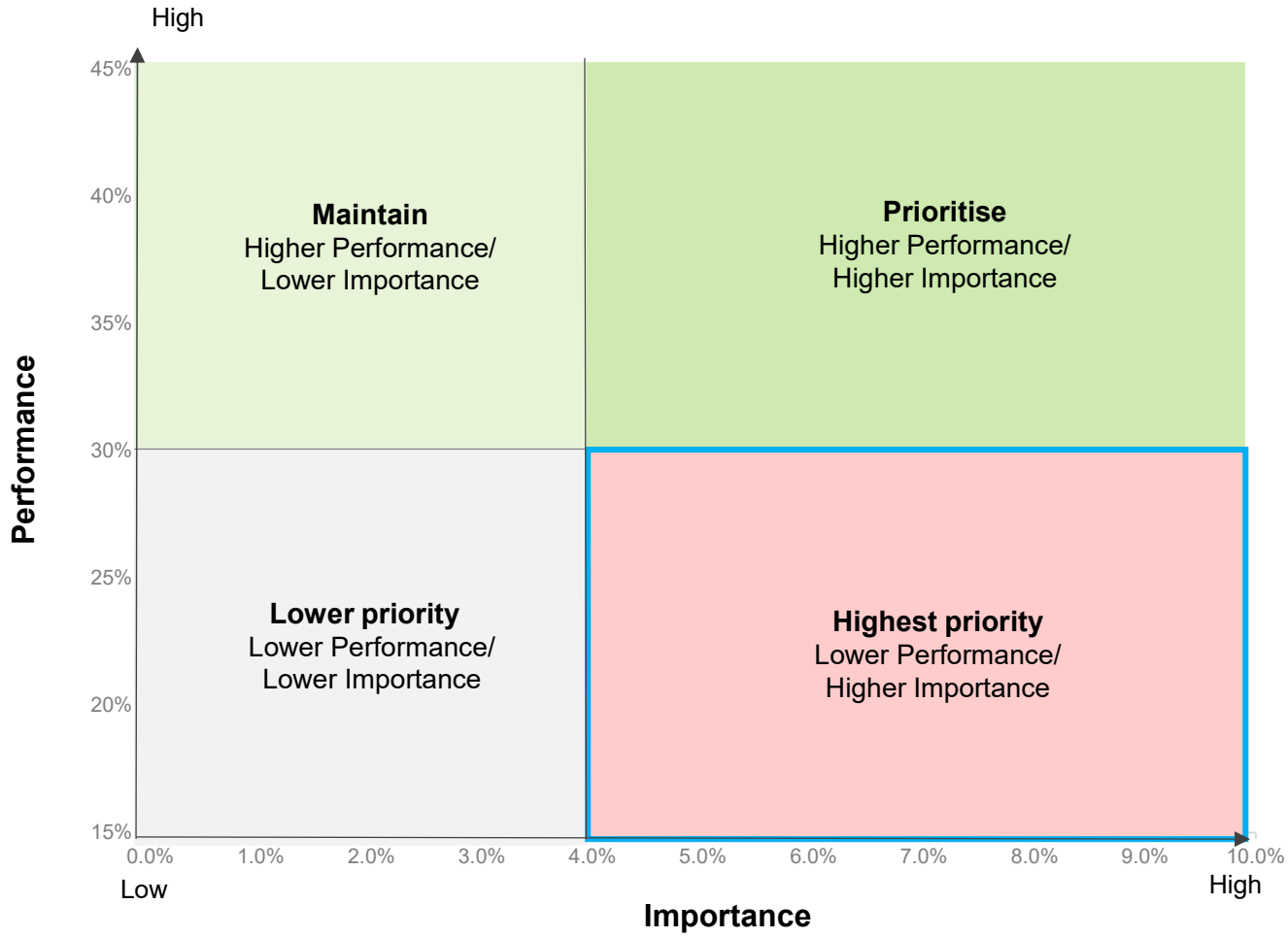
The percentage of passengers rating the railway's performance on individual features as "Excellent" or "Very good" (7 point scale).

The horizontal line at 30% is the average score of excellent or very good across the 25 measures.

The Quadrants

Each represents areas where the features are above or below the average performance and/or importance rating.

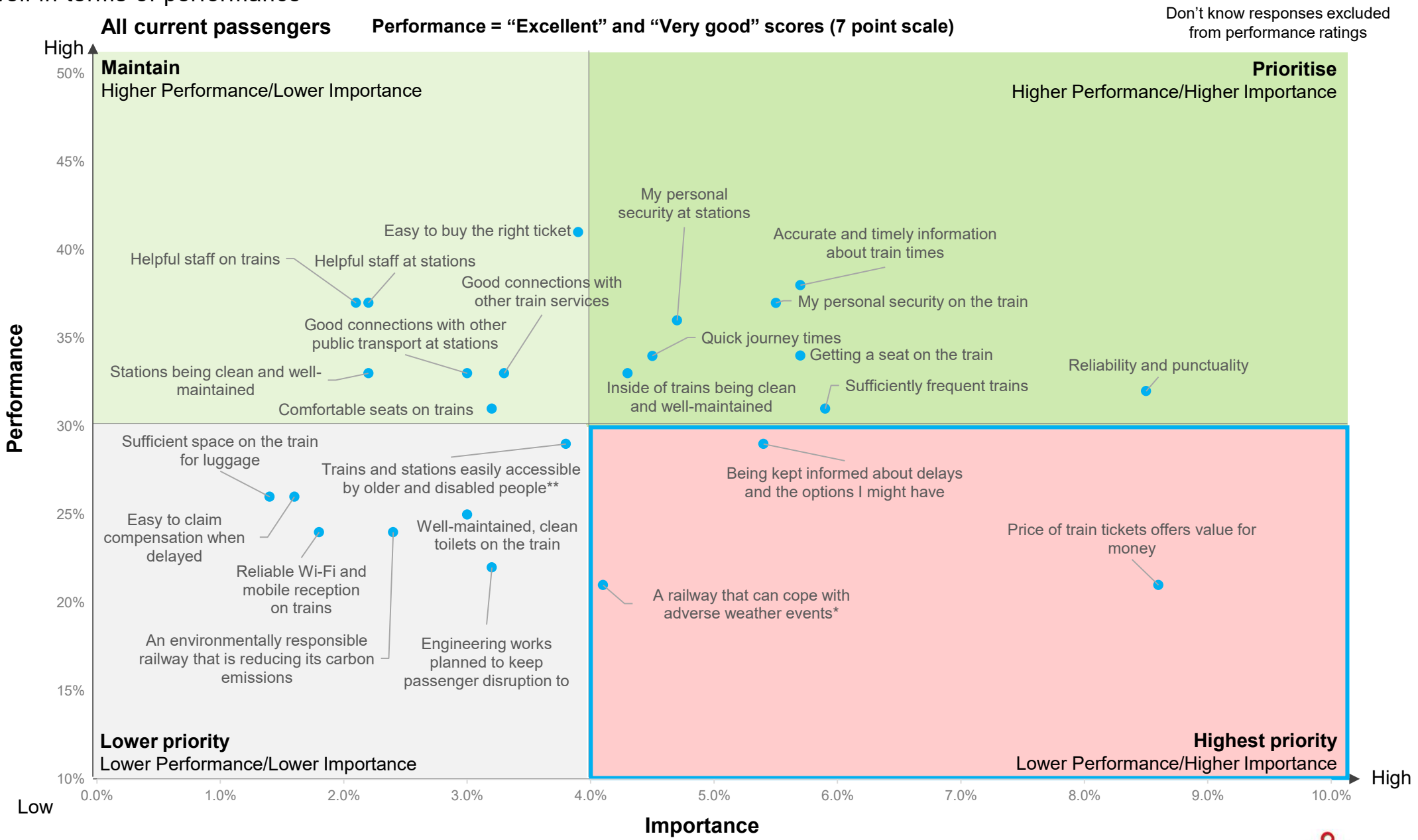
For example, those features in the pink box (Highest priority) are of above average importance and below average performance. Whereas, those in the top right quadrant (Prioritise) are both of higher than average importance and higher than average performance.



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following.

IMPORTANCE VERSUS PERFORMANCE – ALL CURRENT PASSENGERS

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following. *Base: All current passengers (n=12,565)*

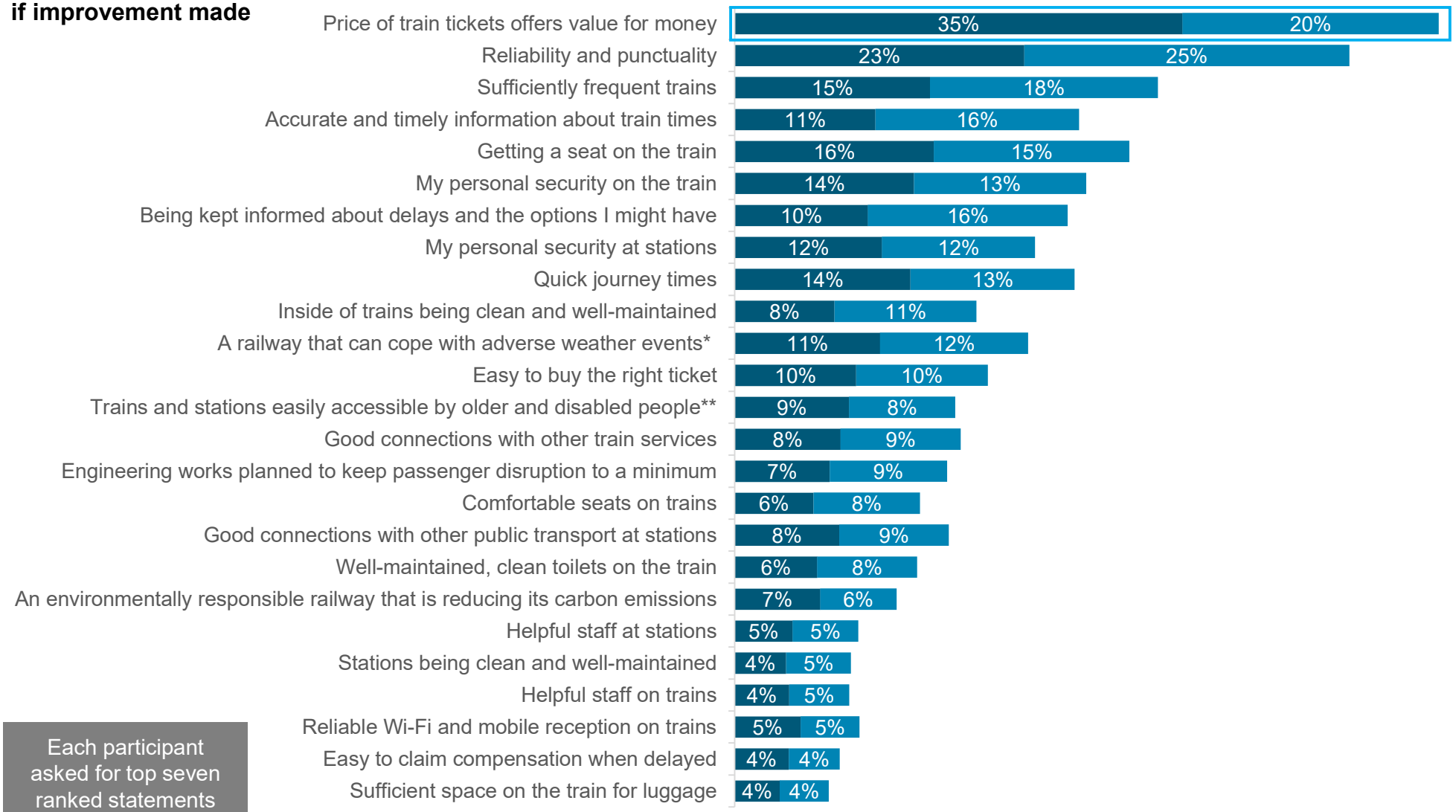
Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

PASSENGERS ARE MOST LIKELY TO SAY THAT THEY WILL TRAVEL MORE BY TRAIN IF IMPROVEMENTS ARE MADE TO THE VALUE FOR MONEY OF TICKETS

quadrangle

Likelihood to travel more by train if improvement made

All current passengers Ranked High-Low importance



Each participant asked for top seven ranked statements from MaxDiff

QB3 If the railway was to improve on each of the following, realistically, do you think it would impact the amount you travel by train in the future?
Base: All current passengers (n=12,565)
Data for each improvement re-based to all current passengers, not just those answering the question for each feature

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

quadrangle

THE IMPORTANCE OF RELIABILITY AND PUNCTUALITY - HEADLINES

quadrangle

01

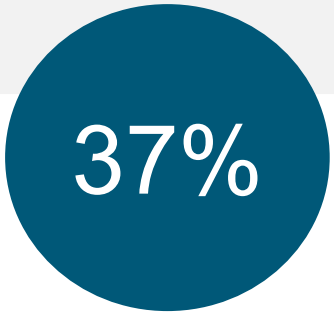
Almost all current passengers have experienced a delay of some kind when travelling by rail

A significant minority of passengers believe that trains are always delayed to some extent and most report having experienced significant delays of more than an hour

tell us that they think they experience delays of 15 minutes or less at least every other time they travel

02

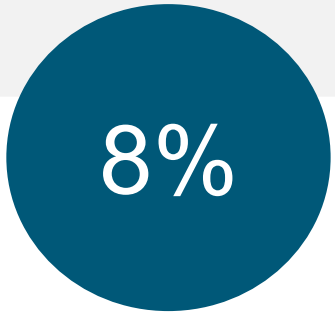
Passengers value consistency of service more than helping to resolve issues (e.g. fewer cancellations or days of disruption)



say that more trains arriving on time is the most important factor overall

03

Reliability and punctuality is most important among those who are most dependent on train travel e.g. those living in rural areas and those who must commute for work



reliability and punctuality is 8% points more important among those living in rural areas compared to those living in cities

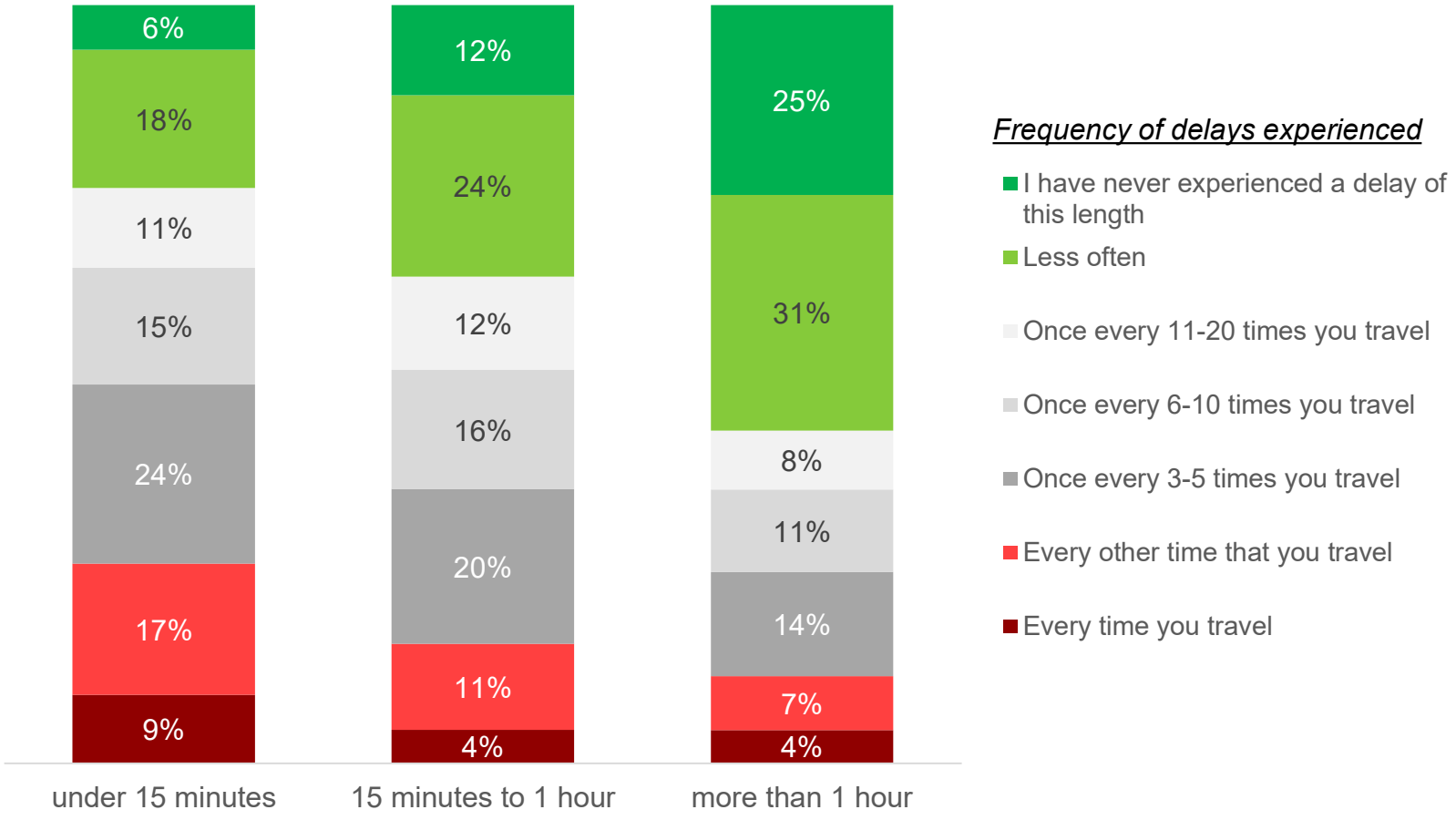
AROUND ONE-QUARTER OF PASSENGERS BELIEVE THAT THEY EXPERIENCE DELAYS OF UNDER 15 MINUTES EVERY TIME, OR EVERY OTHER TIME, THAT THEY TRAVEL BY TRAIN

THREE-QUARTERS OF PASSENGERS SAY THAT THEY HAVE EXPERIENCED A DELAY OF MORE THAN ONE HOUR

Business and Personal Business travellers are more likely than the average to report experiencing delays

Delays are especially important for these groups as they are more likely to have time-sensitive commitments

Length of delays experienced (Don't know or can't recall (5%) excluded)



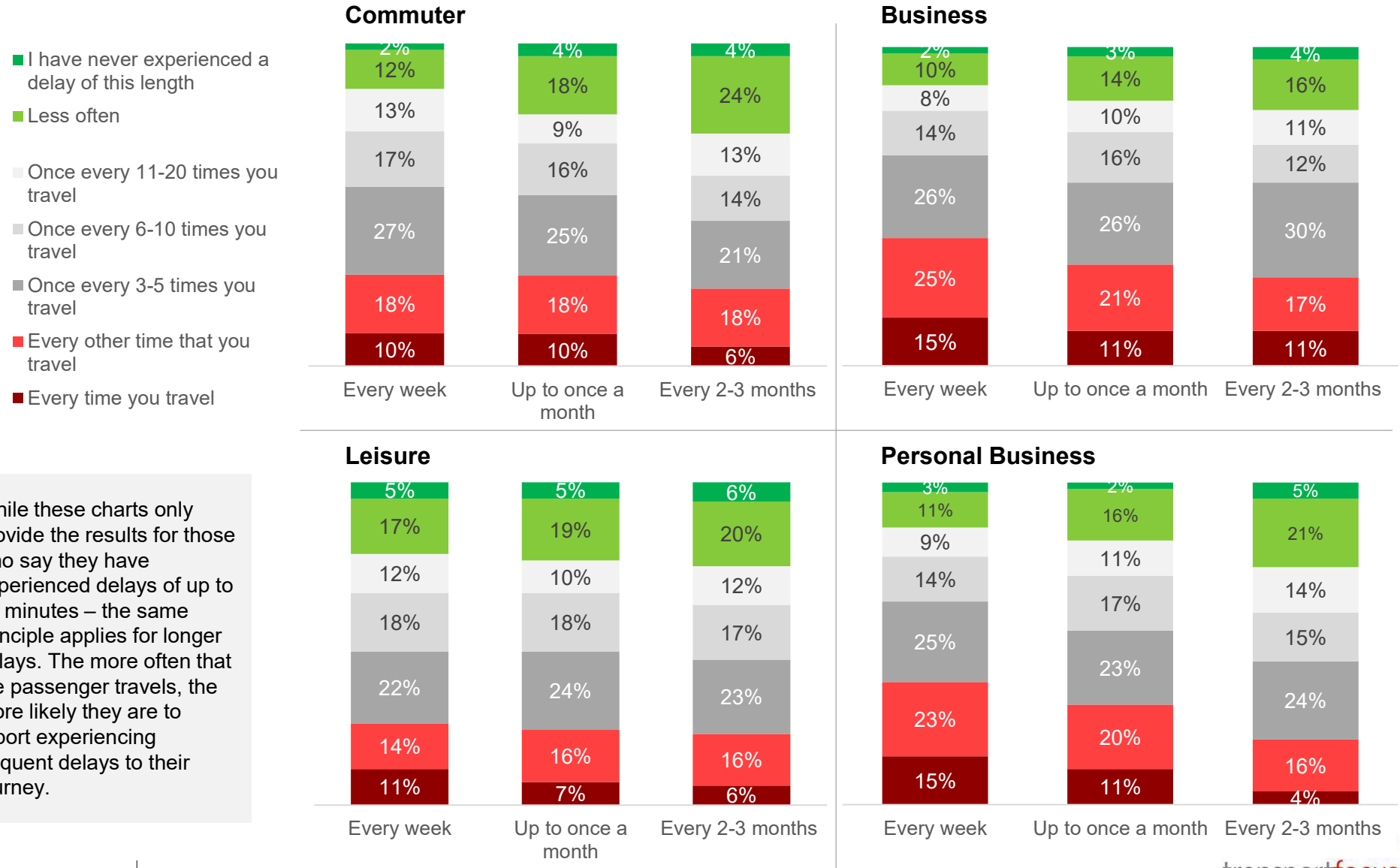
QC4. Approximately, how often do you experience the following lengths of delay?
Base: All current passengers (n=12,565)

GENERALLY, THOSE WHO TRAVEL MORE REGULARLY ARE MORE LIKELY TO SAY THAT THEY EXPERIENCE DELAYS WHEN THEY TRAVEL

quadrangle

AS ILLUSTRATED BELOW – FOR ALL JOURNEY PURPOSES, THE MORE OFTEN THAT A PASSENGER TRAVELS, THE MORE OFTEN THEY ARE LIKELY TO REPORT A DELAY ON THEIR JOURNEY

Experienced delays of up to 15 minutes by journey purpose *(don't know or can't recall excluded)*



While these charts only provide the results for those who say they have experienced delays of up to 15 minutes – the same principle applies for longer delays. The more often that the passenger travels, the more likely they are to report experiencing frequent delays to their journey.

QC4. Approximately, how often do you experience the following lengths of delay?
Base: All current passengers (n= 12,565), Commuter (n=2,329), Business (n=2,323), Leisure (n=5,576) and Personal Business (n=2,337)

THE PUNCTUALITY OF THE SERVICE, WITH MORE JOURNEYS ARRIVING ON TIME, IS FAVOURED OVER MORE FREQUENT OR QUICKER TRAINS

quadrangle

What is most important to you? (don't know (12%) excluded)

45% — More trains arriving at their destination on time

versus

42% — A reduction in the amount of train cancellations or days where there is widespread disruption

What is most important to you? (don't know (10%) excluded)

40% — To run an extra train, even if punctuality suffers

versus

50% — To ensure that trains run to schedule even if there are more passengers on the train

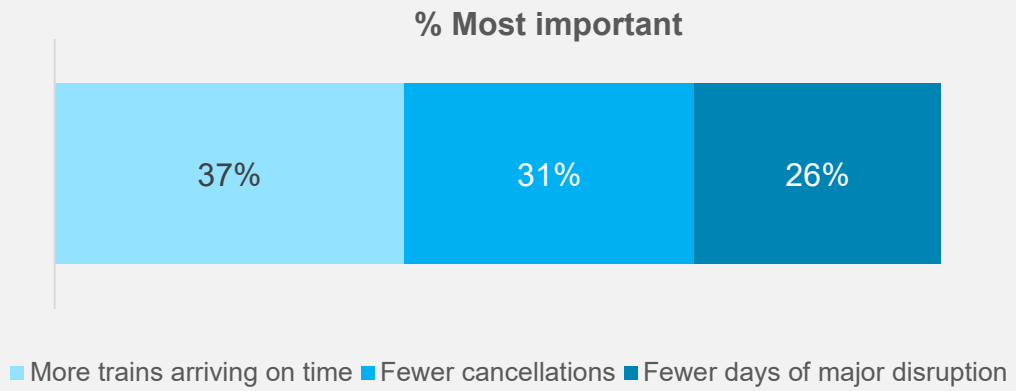
What is most important to you? (don't know (9%) excluded)

19% — A service that gets you to your destination quicker, but an increased chance of delays

versus

72% — To ensure that trains run to schedule, but with no improvement to journey times

Summary: What is most important to you? (don't know (6%) excluded)



QC1A. What is more important to you? *Base: All current passengers (n= 12,565)*
QC1B. On some routes it may be theoretically possible to run an extra train. This would mean a higher frequency of trains and less crowding, but it could mean that punctuality suffers. Which is more important? *Base: All current passengers (n= 12,565)*
QC1C. On some routes it may be possible to reduce journey time, but it might come at the cost of more erratic punctuality (one day it runs fine, the next it is late). Which is more important? *Base: All current passengers (n= 12,565)*
QC2. In summary, which of the following do you think is most important? *Base: All current passengers (n= 12,565)*

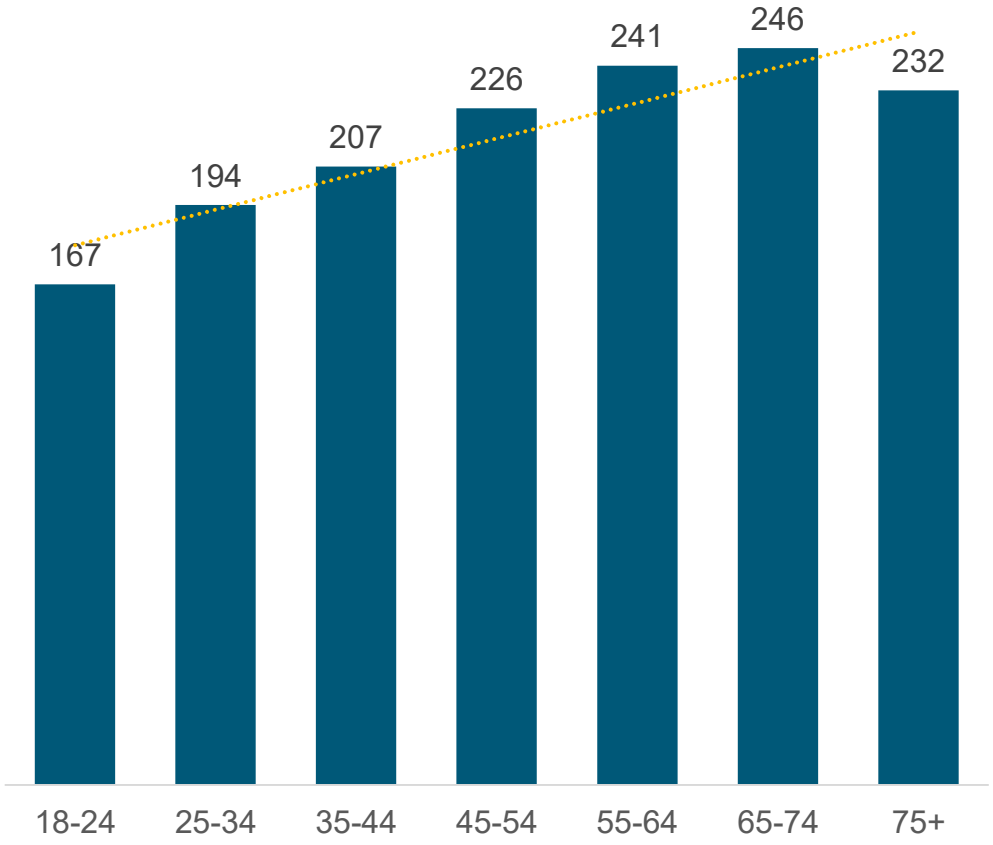
© Quadrangle 2022

THE IMPORTANCE OF RELIABILITY AND PUNCTUALITY INCREASES WITH AGE

quadrangle

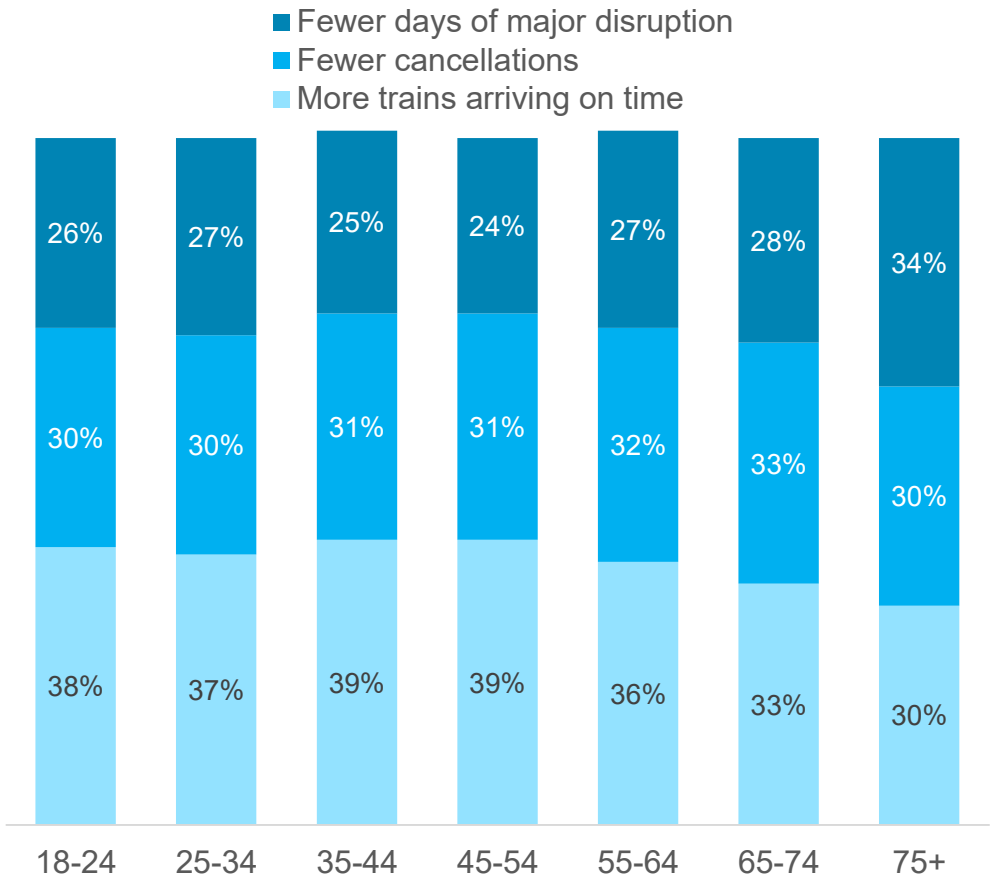
MORE TRAINS ARRIVING ON TIME AND FEWER CANCELLATIONS ARE GENERALLY WHAT MATTERS MOST ACROSS ALL THE AGE GROUPS

Importance of reliability and punctuality *(average 100)*



Scores from MaxDiff results where average importance = 100

Summary: What is most important to you?



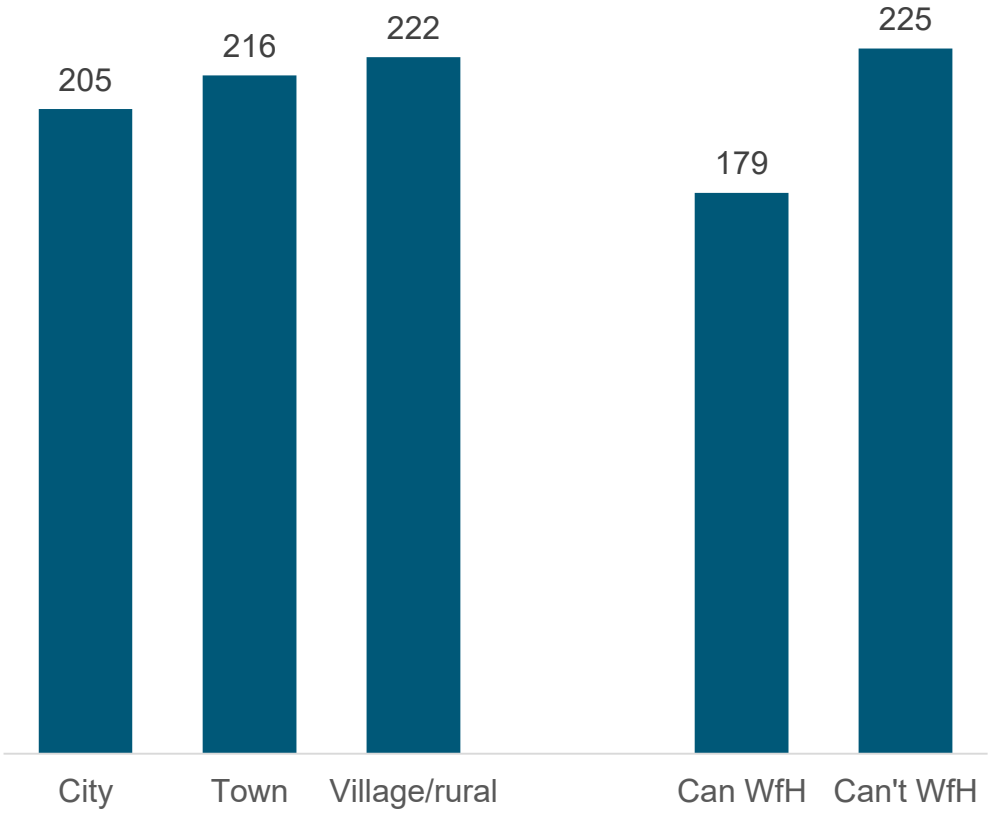
MXD1 Please tell us which of the items are most important to you when travelling by train.
QC2. In summary, which of the following do you think is most important?

Base: All current passengers (n=12,565), 18-24 yrs (n=1,569), 25-34 yrs (n=2,928), 34-44 yrs (n=2,720), 45-54 yrs (n=1,686), 55-64 yrs (n=1,889), 65-74 yrs (n=1,391), 75+ yrs (n=382)

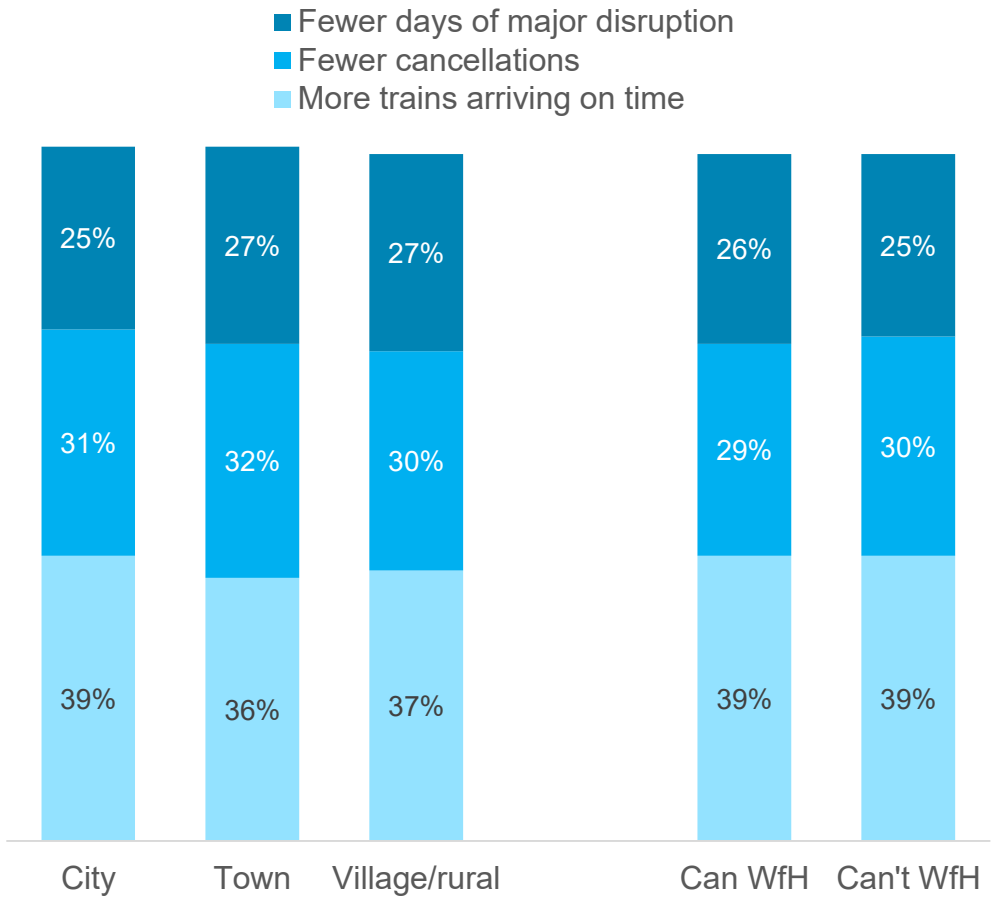
THOSE LIVING IN RURAL AREAS AND THOSE WHO CANNOT WORK FROM HOME (WFH) PLACE MORE IMPORTANCE ON RELIABILITY AND PUNCTUALITY THAN THE AVERAGE

MORE TRAINS ARRIVING ON TIME AND FEWER CANCELLATIONS ARE KEY ACROSS THE BOARD

Importance of reliability and punctuality *(average 100)*



Summary: What is most important to you?



Scores from MaxDiff results where average importance = 100

MXD1 Please tell us which of the items are most important to you when travelling by train.
QC2. In summary, which of the following do you think is most important?

Base: All current passengers (n=12,565), City (n=5,159), Town (n=4,954), Village/rural (n=2,451), Can WfH (n=1,070), Can't WfH (n=3,330)

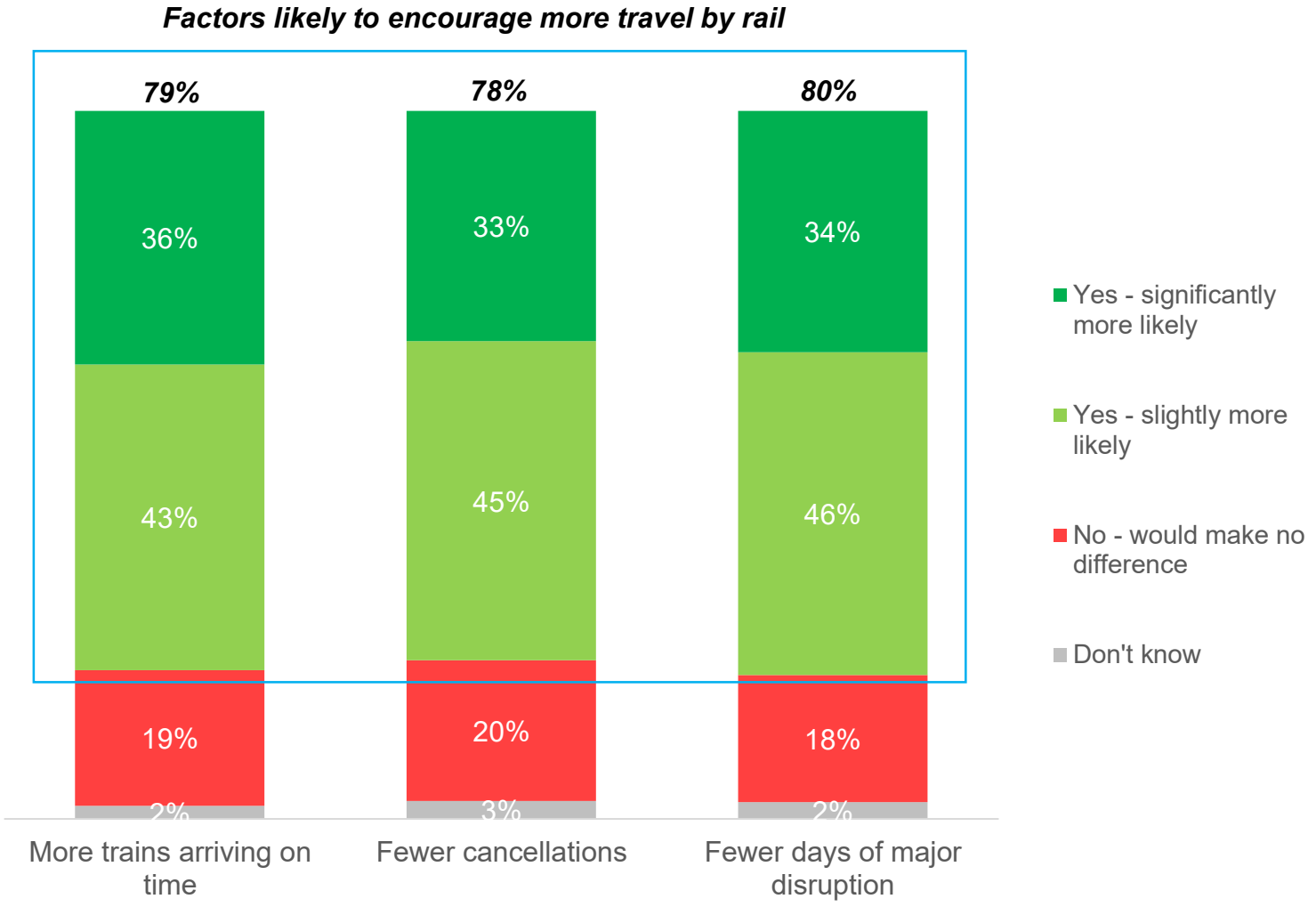
HOWEVER, MORE TRAINS ARRIVING ON TIME IS NO MORE LIKELY THAN OTHER IMPROVEMENTS TO ENCOURAGE PASSENGERS TO TRAVEL BY RAIL MORE

NEVERTHELESS, ACROSS THESE FACTORS, BUSINESS TRAVELLERS APPEAR MORE LIKELY TO TRAVEL MORE BY RAIL IF IMPROVEMENTS ARE MADE

Business travellers are almost 10% points more likely to say that these changes would encourage them to travel by train more

For **Personal Business** travellers, fewer days of major disruption would encourage 87% to travel by train more

Conversely, **Leisure travellers** are less likely than the average to say that these changes would encourage them to travel by train more



QC3. And if the railway was to make further improvements with regards to …, would this be likely to have any impact on the amount you travel by train?
Base: Current passengers (n=11,901)

ENVIRONMENT/SUSTAINABILITY - HEADLINES

quadrangle

01

The ability for the railway to cope with adverse weather is the most important and impactful environmental concern among rail passengers

54%

rate it as “very important” to invest in, 80% “very/fairly important”

02

The importance of environmental factors to passengers decreases with age – 18-24 year olds are most likely to say that they would travel more by train if environmental factors were tackled and those aged 75+ least likely

40%

of 18-24 year olds say they would be significantly more likely to use the railway if renewable sources of energy are used to power trains versus 16% of those aged 65+

03

Environmental concerns are most important to Business passengers and least important to Leisure passengers

44%

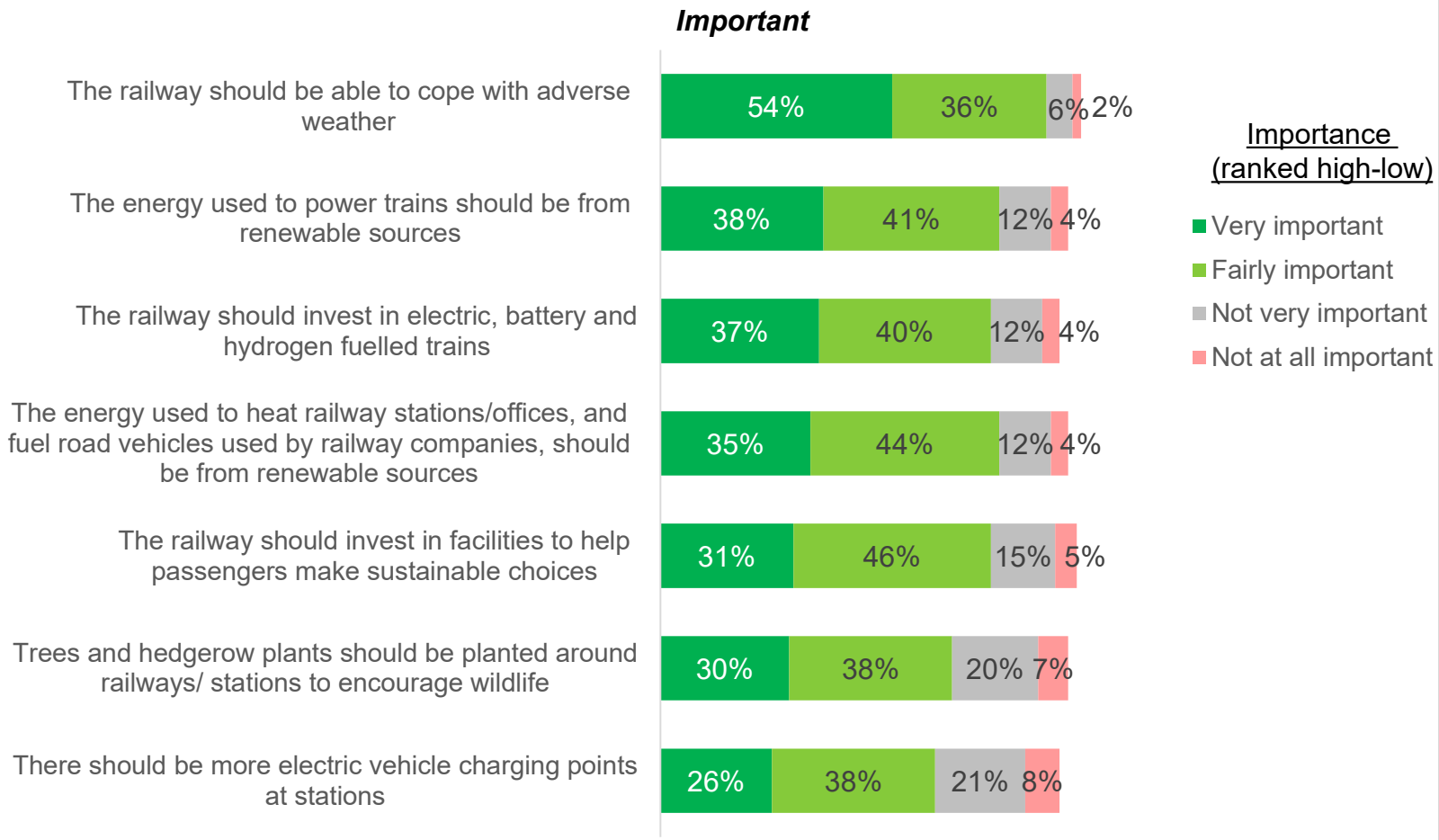
of Business travellers say they would be significantly more likely to travel by rail if the railway improved its ability to cope with adverse weather (versus 25% of Leisure travellers)

ALL OF THE ENVIRONMENTAL FACTORS TESTED ARE IMPORTANT TO PASSENGERS, PARTICULARLY THE ABILITY FOR THE RAILWAY TO BE ABLE TO COPE WITH ADVERSE WEATHER

The **ability for the railway to cope with adverse weather** is particularly important to **older people** ("very important" 64% for 75+ year olds versus 43% for 18-24 year olds)

Conversely, **electric charging points** have greater relative importance for young people ("very important" 28% for 18-24 year olds versus 20% for 75+ year olds)

Please note that fieldwork took place after a period of extreme heat in the UK

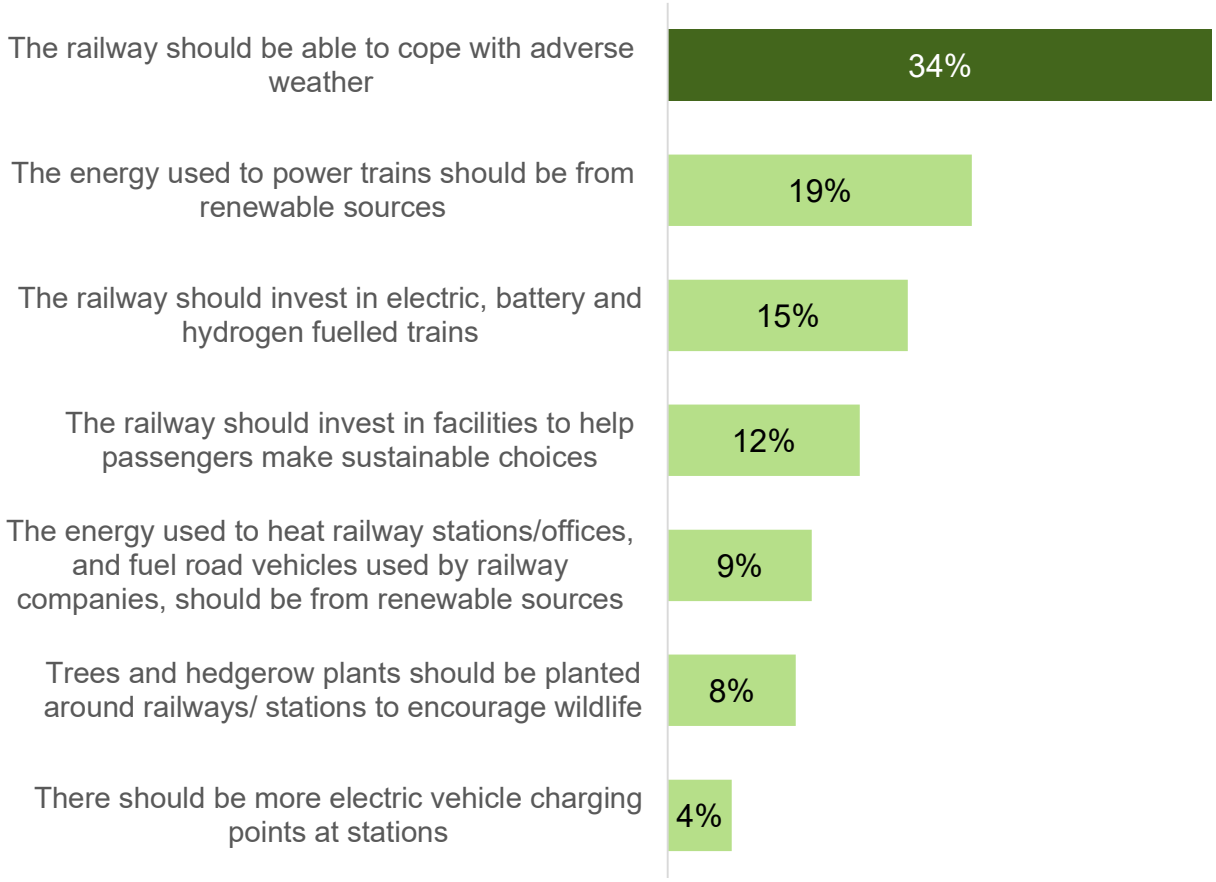


QC14. Overall, in respect of trains and the railway, how important, if at all, is it for the railway to invest in the following things?
Base: All passengers (n=15,226) (includes lapsed passengers)

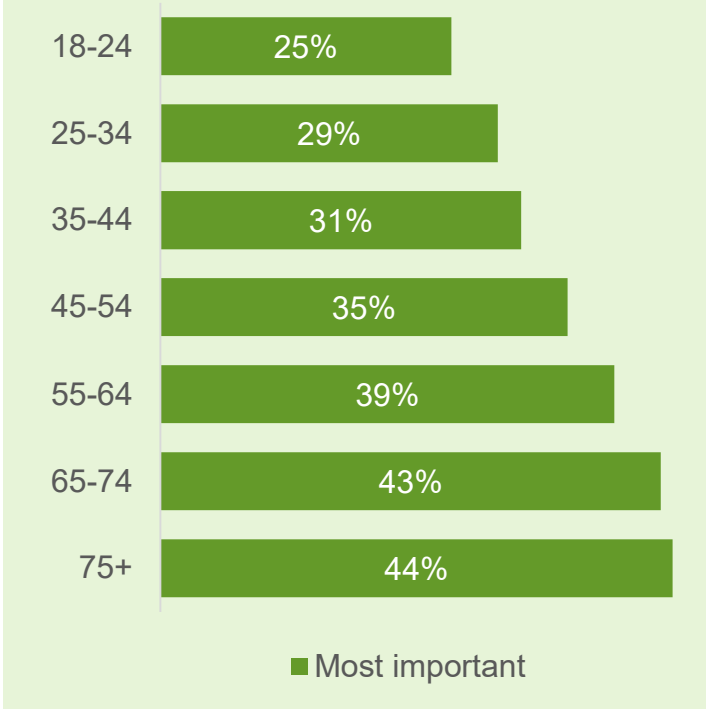
HOW TRAINS ARE POWERED, WITH THE USE OF SUSTAINABLE POWER SOURCES AND ELECTRIC TRAINS, ARE THE OTHER TOP EXPECTATIONS AFTER THE RELIABILITY OF THE SERVICE DURING ADVERSE WEATHER

quadrangle

Most important (ranked high-low)



"Railway should be able to cope with adverse weather" - most important by age

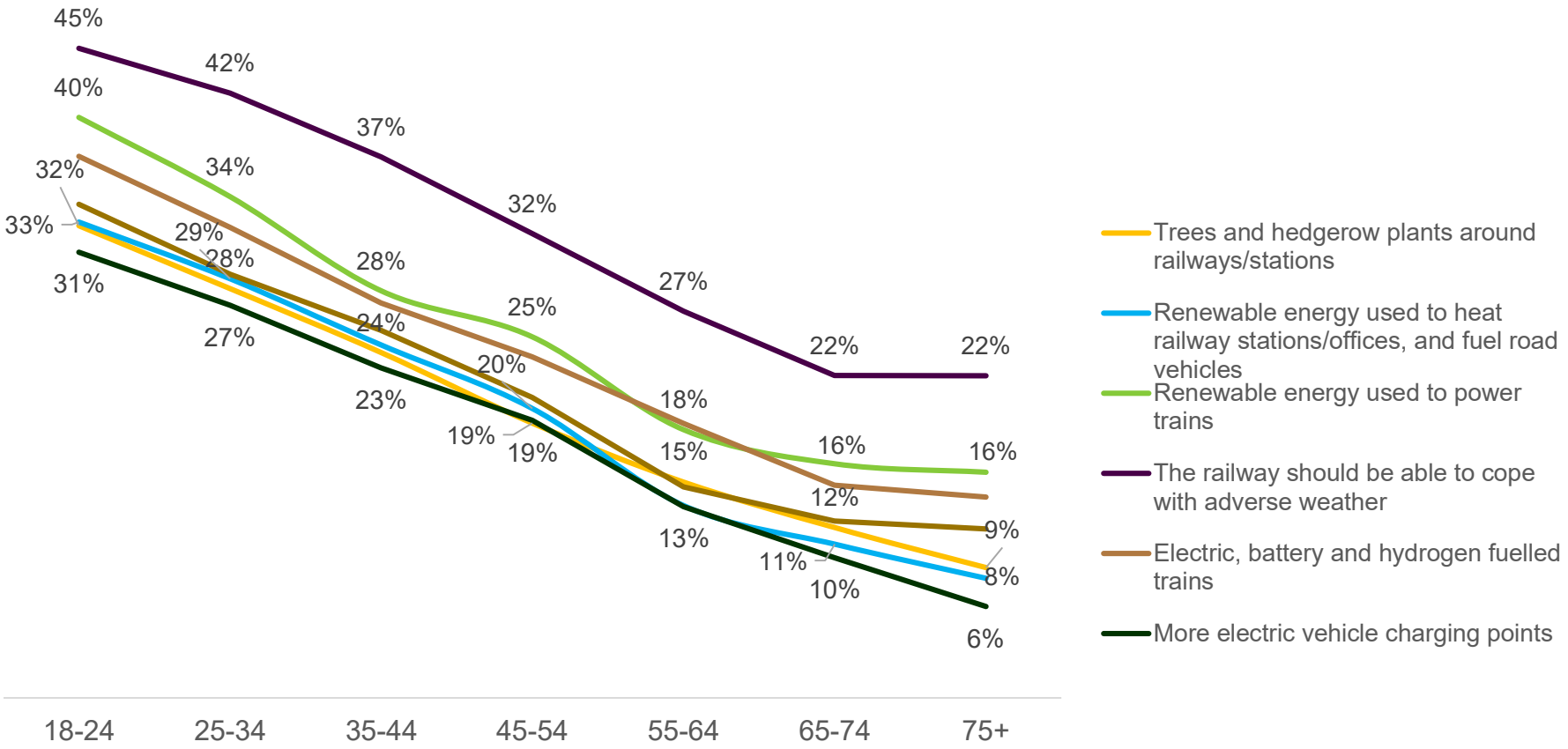


QC15. You mentioned that the following are important to you. Which would you say is MOST important to you?
Base: All who considered at least one of the environmental factors very or fairly important at QC14 (n=14,448), 18-24 (n=1,685), 25-34 yrs (n=3,183), 35-44 yrs (n=2,985), 45-54 yrs (n=1,885), 55-64 yrs (n=2,341), 65-74 yrs (n=1,804), 75+ yrs (n=565)

THE IMPORTANCE OF ENVIRONMENTAL ISSUES AND THEIR IMPACT ON LIKELIHOOD TO TRAVEL BY RAIL IS GREATEST FOR YOUNGER PASSENGERS

quadrangle

Proportion claiming to be significantly more likely to travel by train by age



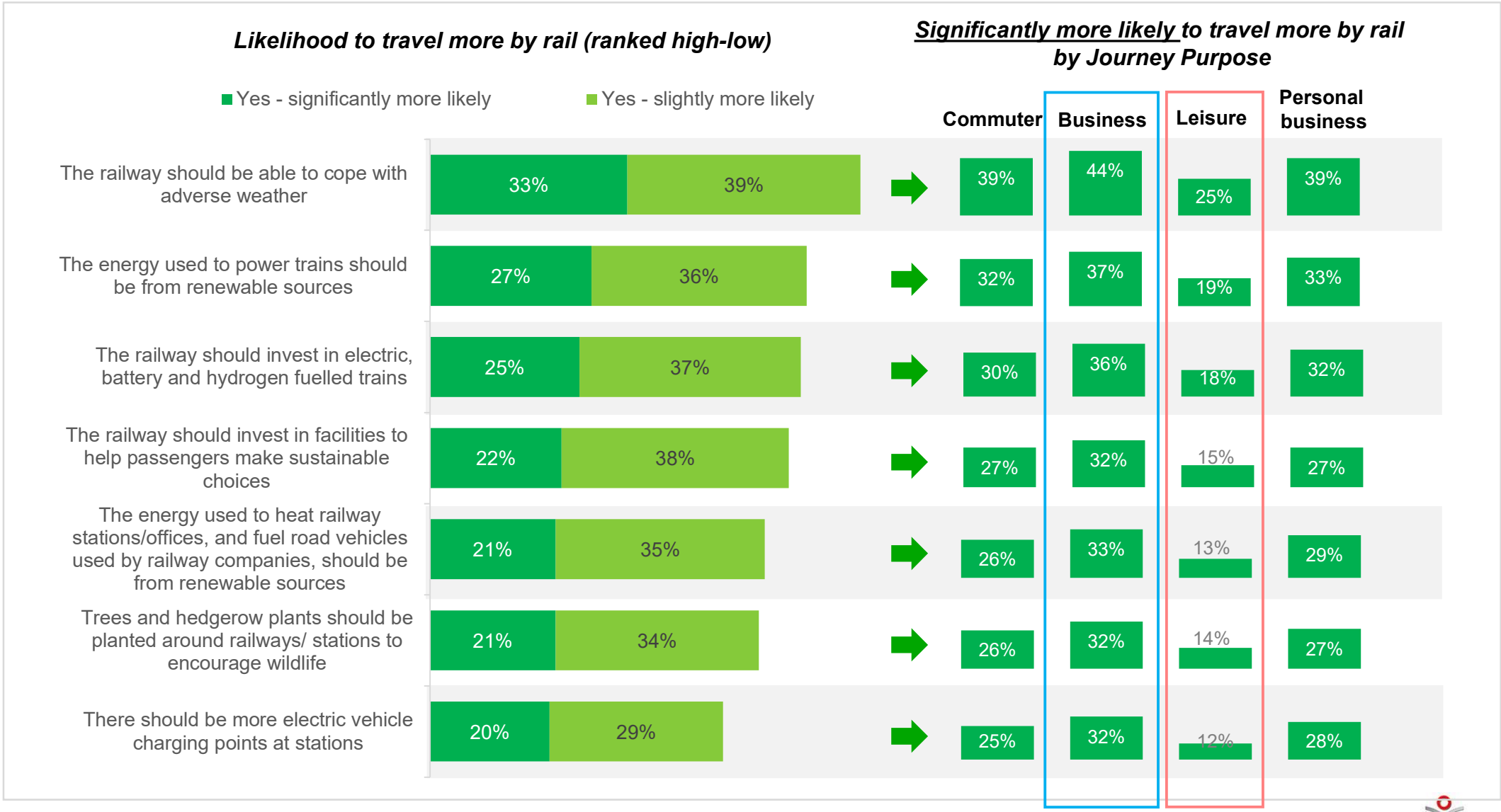
QC16. And if the railway was to address these issues, would it have any impact on your rail travel?
Base: All for whom each issue is very/fairly important (n=9,468-13,712)

Exact codes used
Trees and hedgerow plants should be planted around railways/stations to encourage wildlife
The energy used to heat railway stations/offices, and fuel road vehicles used by railway companies, should be from renewable sources (e.g. wind or solar power)
The energy used to power trains should be from renewable sources (e.g. wind or solar power)
The railway should be able to cope with adverse weather (e.g. snow, wind, flooding, extreme heat)
The railway should invest in electric, battery and hydrogen fuelled trains
There should be more electric vehicle charging points at stations
The railway should invest in facilities to help passengers make sustainable choices (e.g. Cycle parking at stations, walking and cycling routes to stations, bus connections to stations)

IF THE RAILWAY WAS TO TACKLE THE KEY ENVIRONMENTAL CHALLENGES, BETWEEN ONE-FIFTH AND ONE-THIRD OF PASSENGERS SAY THAT THEY WOULD BE LIKELY TO TRAVEL BY TRAIN MORE IN THE FUTURE

quadrangle

BUSINESS TRAVELLERS ARE MOST LIKELY TO SAY THAT THEY WOULD BE SIGNIFICANTLY MORE LIKELY TO TRAVEL BY RAIL, AND LEISURE TRAVELLERS LEAST LIKELY



QC16. And if the railway was to address these issues, would it have any impact on your rail travel?
Base: All for whom each issue is very/fairly important (n=9,468-13,712)
Commuter (n=1,525-2,026), Business (n=1,613-2,002), Leisure (n=3,346-5,144), Personal Business (n=1,548-2,076)

quadrangle

© Quadrangle 2022

01

Sundays are considered to be the least disruptive day of the week for works

But for longer-term work, a **one-week closure is slightly preferred to six consecutive weekends**

rate Sundays as “least disruptive” compared to 20% who say it is the “most disruptive” day for closure

02

Mondays and Fridays are considered the **most disruptive days** for planned disruption. This is fairly consistent across journey purposes

of all passengers say Fridays are the most disruptive days for closures (50% say Mondays)

03

Views are polarised on the best time of year for planned works on the railway

School term times and **the Christmas/New Year holiday periods are considered both the most *and* the least disruptive periods** for planned works on the railway depending on the passengers’ circumstances

SUNDAYS ARE CONSIDERED THE LEAST DISRUPTIVE DAY OF THE WEEK FOR PLANNED WORKS

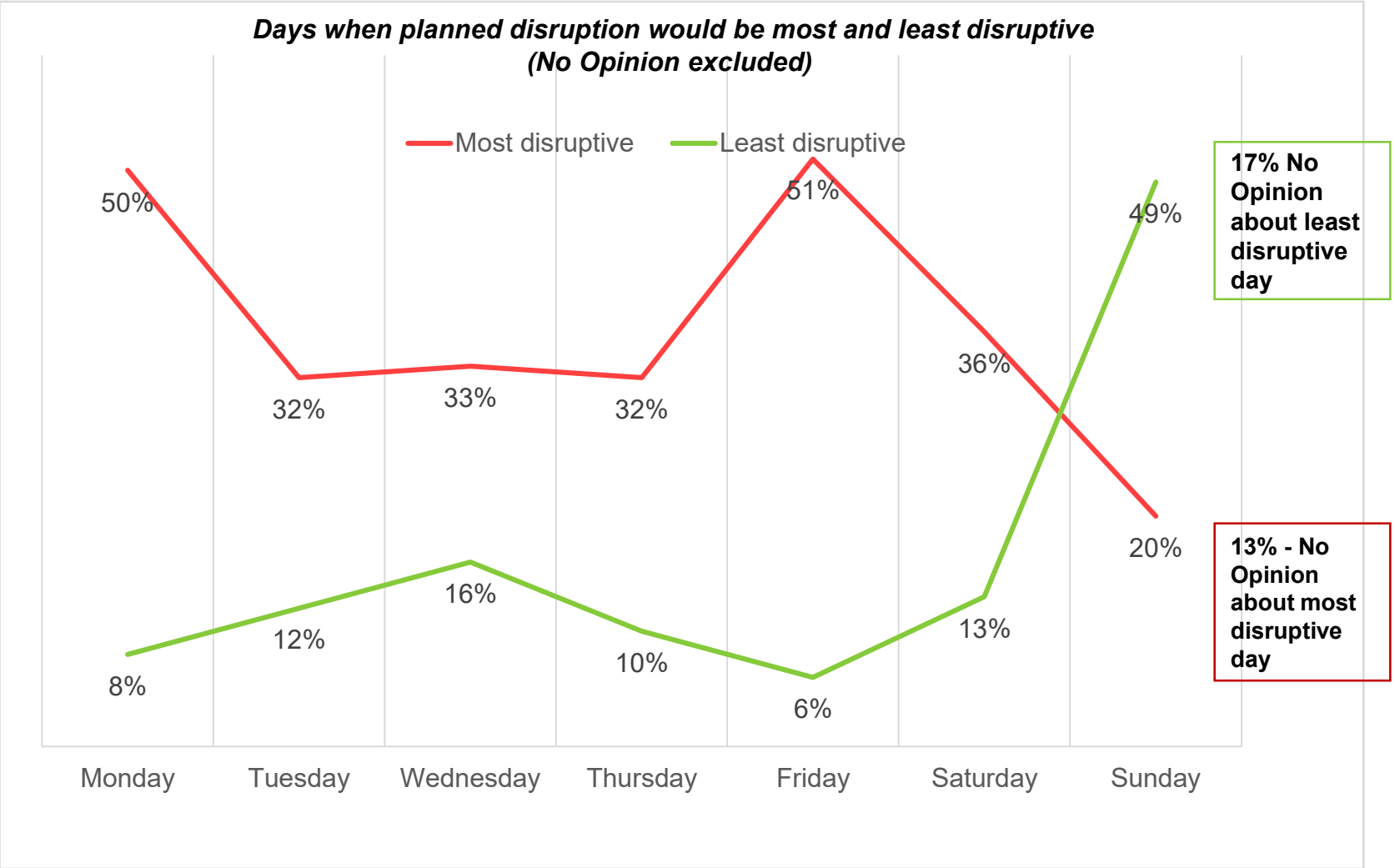
MONDAYS AND FRIDAYS ARE CONSIDERED THE MOST DISRUPTIVE DAYS OF THE WEEK FOR PLANNED ENGINEERING OR OTHER ACTIVITIES

Sundays are perceived as the least disruptive day of the week for works for all journey purposes

Those who tend to take **longer journeys** of more than one hour are slightly more likely than average to think that the weekends are the most disruptive time

Leisure travellers specifically are more likely to think that Fridays and Saturdays are the most disruptive days

Retirees are most likely to consider Sundays to be the least disruptive days

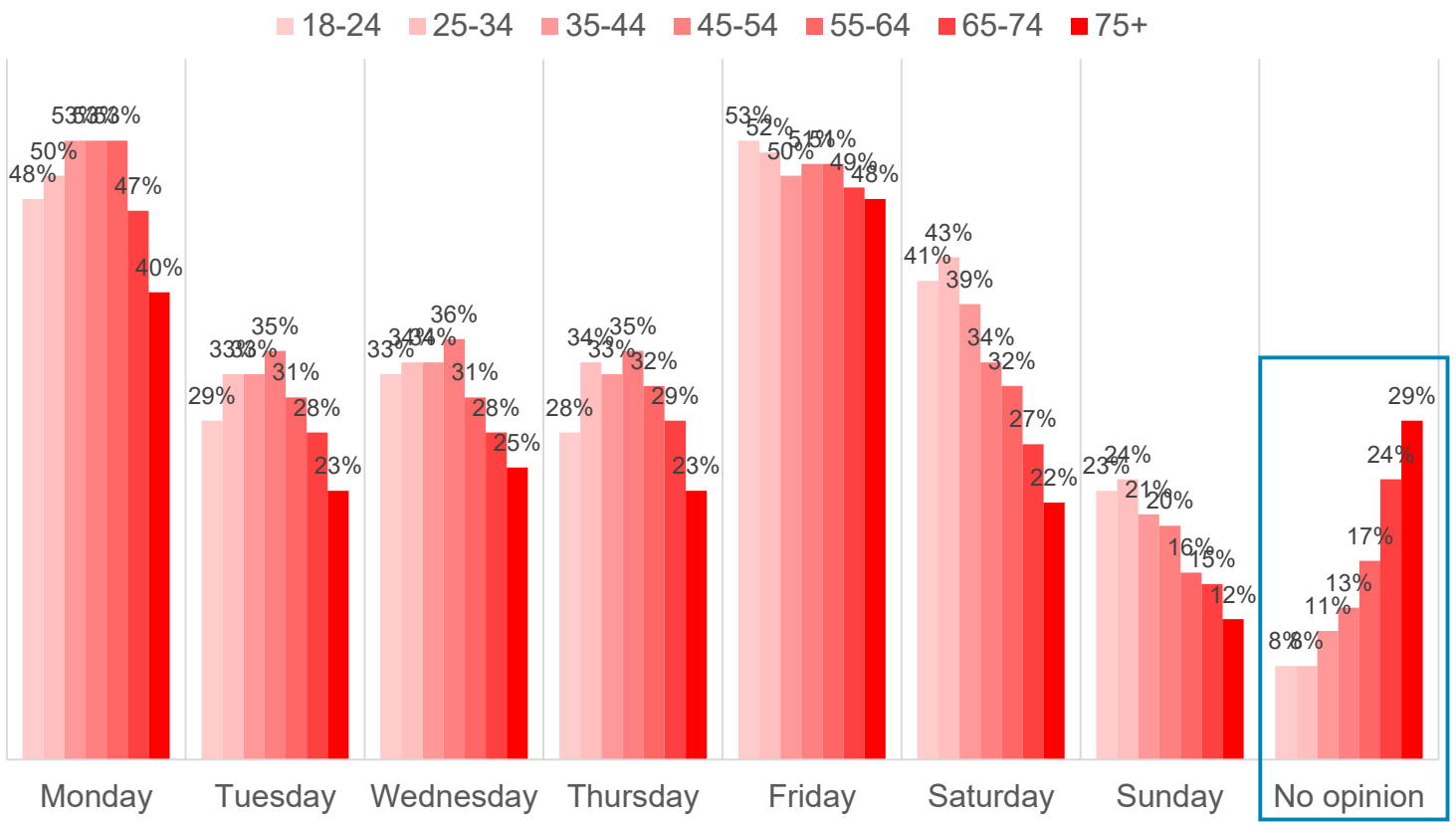


QC9. To start, thinking about the days of the week when planned disruption might occur, please could you tell us
a) the day(s) of the week when you think closures would be most disruptive
b) the day(s) of the week when you think closures would be least disruptive
Base: All current passengers (n= 12,565)

OLDER PEOPLE ARE MOST LIKELY NOT TO CARE ABOUT WHEN DISRUPTION OCCURS

BUT OVERALL, ALL AGE GROUPS THINK THAT MONDAY AND FRIDAY ARE THE MOST DISRUPTIVE DAYS

Days when planned disruption would be <u>most disruptive</u>
By Age



QC9. To start, thinking about the days of the week when planned disruption might occur, please could you tell us
a) the day(s) of the week when you think closures would be <u>most disruptive</u>
b) the day(s) of the week when you think closures would be <u>least disruptive</u>
Base: 18-24 yrs (n=1,569), 25-34 yrs (n=2,928), 34-44 yrs (2,720), 45-54 yrs (1,686), 55-64 yrs (n=1,889), 65-74 yrs (n=1,391), 75+ yrs (n=382)

VIEWS ON WHEN PLANNED DISRUPTION OCCURS ARE POLARISED, WITH SCHOOL TERM TIMES AND CHRISTMAS HOLIDAYS REGARDED AS BOTH THE MOST AND LEAST DISRUPTIVE

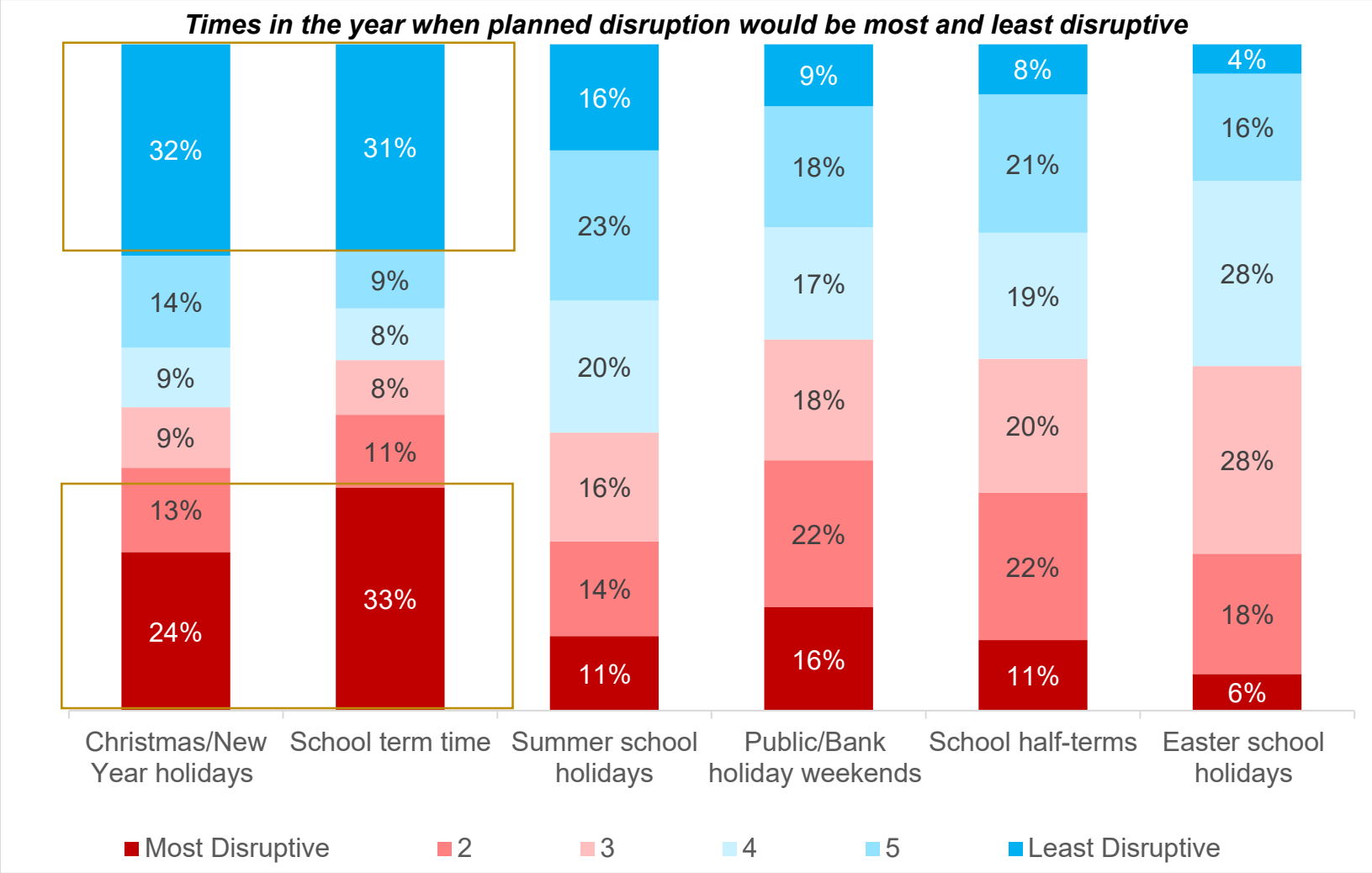
quadrangle

RANKED IN ORDER OF LEAST DISRUPTIVE

The **Christmas and New Year holidays** are more likely to be rated as the **most disruptive** by females, those aged 25-34, less recent travellers, those travelling for more than one hour and those travelling on Long Distance TOCs

In contrast, Christmas and New Year is more likely to be regarded as **the least disruptive time** for males, those who had travelled in the past week and those travelling on Southern

School term times are considered most disruptive by students, males and frequent passengers; and **least disruptive** by females, those aged under 45, Leisure passengers and those who go on longer journeys



QC10. This time thinking about the times in the year when planned disruption might take place, please rank the following periods in terms of the least disruptive to the most disruptive times for engineering works to take place.
Base: All current passengers (n=12,575)

ONE-WEEK PLANNED CLOSURES ARE SLIGHTLY PREFERRED TO A SERIES OF WEEKENDS, WITH ALMOST TWO IN FIVE SAYING THEY WOULD PREFER THIS, COMPARED TO THREE IN TEN WHO WOULD PREFER SIX CONSECUTIVE WEEKEND CLOSURES

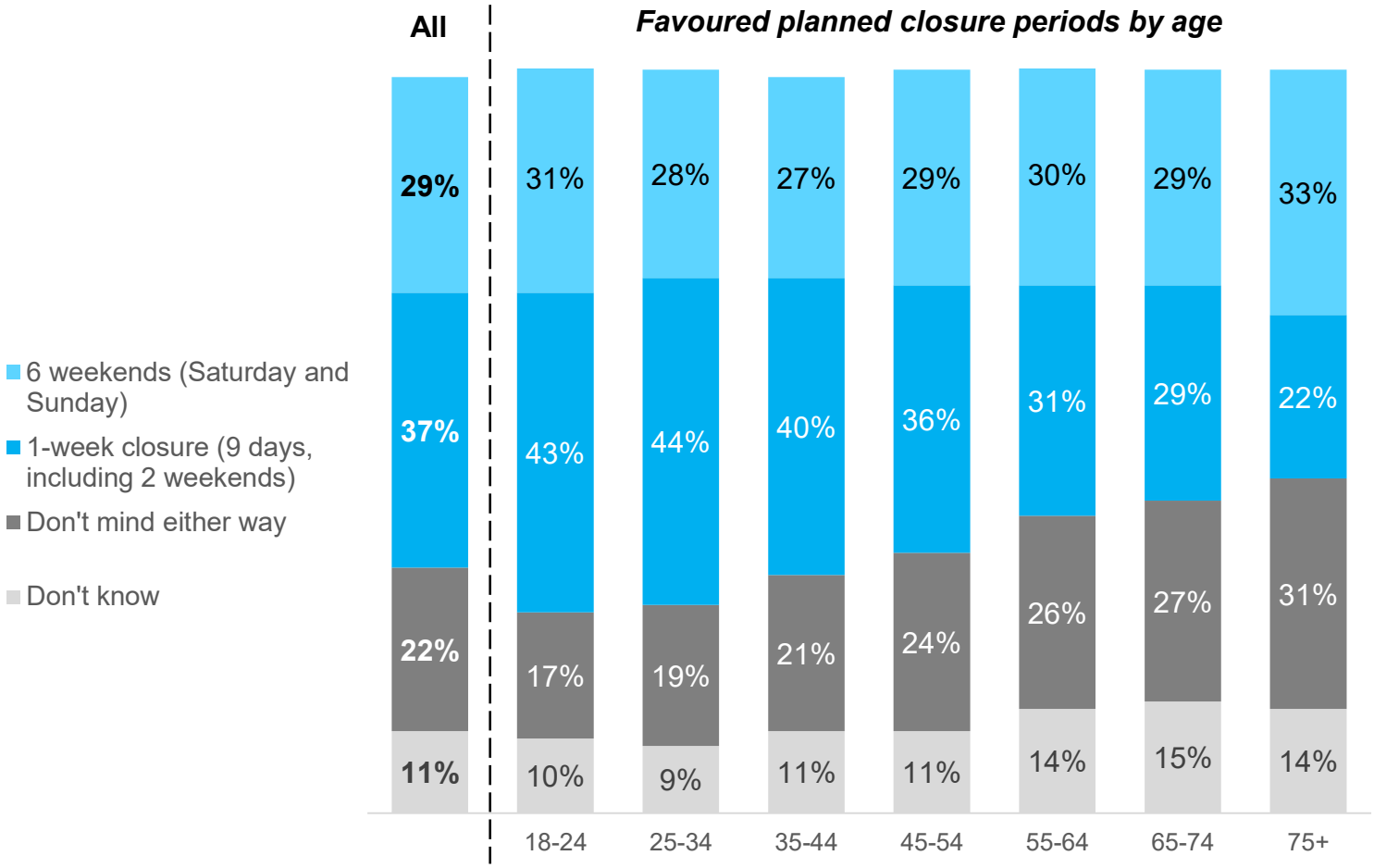
quadrangle

Introduction: We asked passengers whether they would prefer a shorter but continuous period of planned disruption, or one which is spread out over a longer period but only at weekends

Generally, **the more frequently that passengers travel, the more favourable they are towards the six-weekend option** for engineering works

Males are more likely than females to prefer weekends, but their favoured option is still a one-week closure

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



QC11. In addition to the times of year when engineering takes place, it can also be planned in one continuous closure, or over a series of weekends. Again, thinking about the timing of railway closures for planned engineering works, on balance, would you prefer lines to be closed for 6 weekends in a row, or for a continuous closure of one week (9 days including 2 weekends)? *Base: All current passengers (n=12,565)*

THREE IN TEN PASSENGERS PREFER SIX WEEKENDS OF DISRUPTION TO A ONE-WEEK (NINE DAY) CLOSURE. THIS DECREASES TO ONE IN FIVE PEOPLE IF THE NUMBER OF CONSECUTIVE WEEKENDS INCREASES TO ELEVEN

Introduction: We asked those passengers who said that they would prefer six weekend closures (29%) whether they would still prefer weekend closures if the number of closures increased

As an example, the proportion decreases to **21% of passengers if the number of weekends is increased to eleven**, at which point more than twice the proportion of passengers would prefer the one-week (nine day) closure (45%) – see opposite

Preference for additional weekend closures by journey purpose and among those who prefer six weekends versus nine days, including two weekends

	Total	Commuter	Business	Leisure	Personal Business	Prefer weekend closures	Prefer 1 week and 2 weekends (9 days) closure
6 weekends						29%	37%
8 weekends	85%	84%	88%	81%	88%	25%	41%
9 weekends	79%	79%	85%	74%	83%	23%	43%
11 weekends	71%	71%	78%	64%	74%	21%	45%
13 weekends	63%	65%	71%	57%	65%	18%	48%
14 weekends	55%	57%	61%	50%	55%	16%	50%
Base	*3,608*	*814*	*798*	*1,284*	*712*		

Business passengers are more likely than Leisure passengers to continue to prefer weekend closures, even when the number increases

QC12. You said that you would prefer the line to be closed for 6 weekends in a row instead of a one-week closure (9 days, including 2 weekends). Would you still prefer a closure of [INSERT WEEKEND NUMBER] to a closure of one week (9 days, including 2 weekends)?

THE ONE-WEEK CLOSURE WAS PREFERRED BY PASSENGERS OVER SIX CONSECUTIVE WEEKENDS. HOWEVER, IF THE CLOSURE IS EXTENDED TO 12 DAYS, EQUAL PROPORTIONS (ONE-THIRD) WOULD PREFER WEEKENDS OVER A CONTINUOUS CLOSURE

quadrangle

Introduction: We asked those passengers who said that they would prefer a one-week closure (37%) whether they would still prefer a continuous closure if the length of this closure increased

As we can see opposite, the same proportion – **33% of passengers** – would prefer a one and a half week closure or six consecutive weekends

Preference for additional weekend closures by journey purpose among those who prefer nine days, including two weekends versus six weekends

	Total	Commuter	Business	Leisure	Personal Business	Prefer 6 weekend closures	Prefer continuous closure
1 week closure (9 days, 2 weekends)						29%	37%
1.5 weeks (12 days including 2 weekends)	90%	88%	90%	90%	89%	33%	33%
2 weeks (16 days including 3 weekends)	76%	76%	80%	75%	75%	38%	28%
2.5 weeks (19 days including 3 weekends)	68%	68%	74%	66%	67%	41%	25%
3 weeks (23 days including 4 weekends)	58%	57%	66%	55%	60%	45%	21%
3.5 weeks (26 days including 4 weekends)	52%	50%	60%	49%	53%	47%	19%
4 weeks (30 days including 5 weekends)	42%	49%	49%	39%	43%	50%	16%
Base	*4,803*	*804*	*874*	*2,243*	*882*		

Business passengers are fixed in their preference and less inclined to switch to the one-week option

QC13. You said that you would prefer the line to be closed for one-week (9 days, including 2 weekends) instead of 6 weekends in a row. Would you still prefer a line closure of [INSERT DURATION] to a closure of 6 weekends in a row

ACCESSIBILITY FOR DISABLED RAIL PASSENGERS - HEADLINES

quadrangle

01

Disabled passengers and those who are travelling with luggage, personal transportation, dogs and helpers often have different expectations to passengers as a whole. For example, the accessibility of the train is the most important feature for those who travel with a mobility scooter or wheelchair – in contrast, it ranked 13th for all passengers

02

Clear announcements and easy to use ticket machines were of highest importance to disabled passengers in terms of making train travel more accessible

59%

said the clarity of audible announcements and ticket machines that are easy to use were very important

03

One in five disabled passengers rate the railway as poor on most aspects of accessibility. Areas for improvement include toilet provision and the clarity of audible announcements

23%

rated the clarity of audible announcements and clean, accessible toilets on trains as being poor

04

Disabled passengers say they would use the train more if accessibility improvements were made

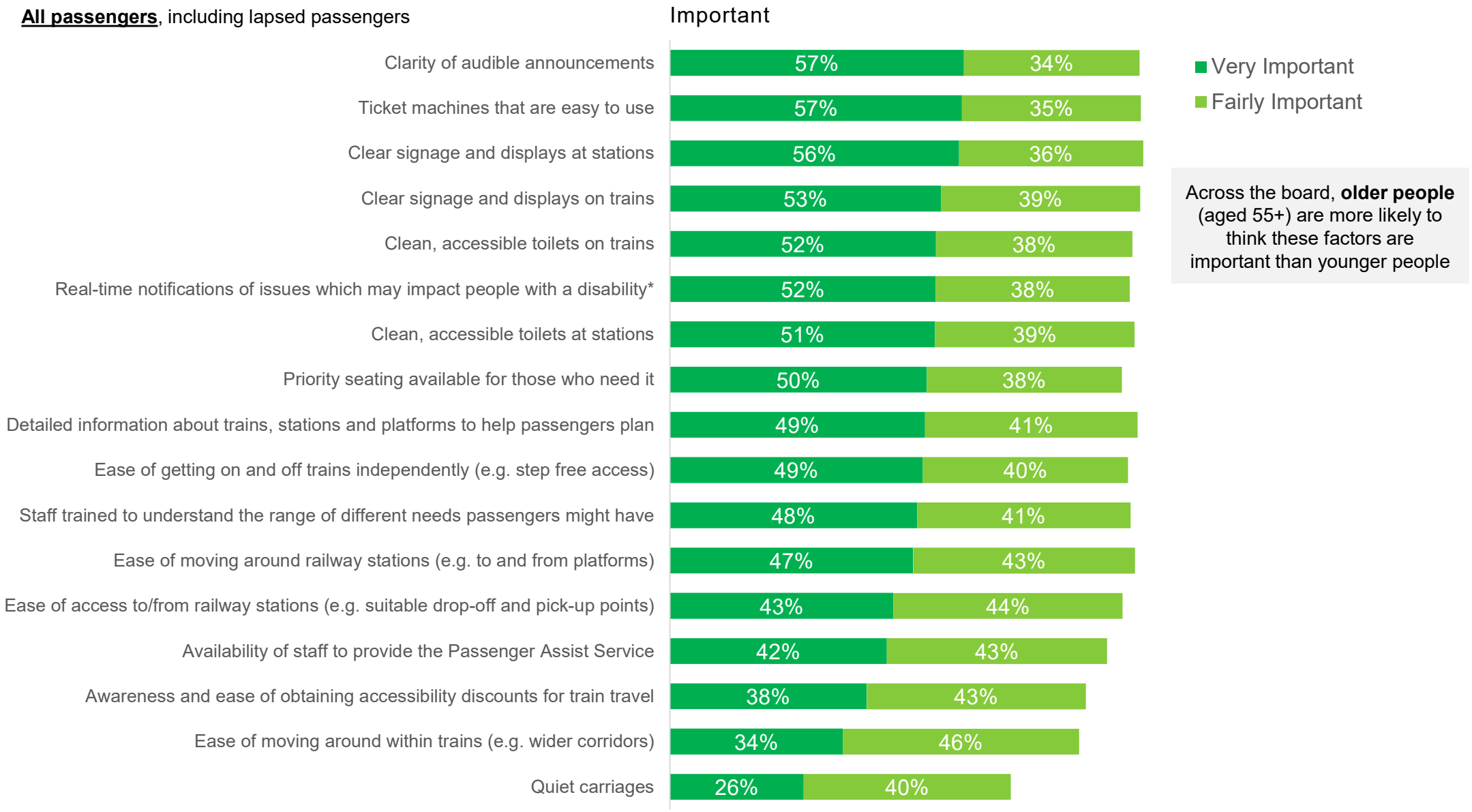
34%

of disabled passengers said they could use trains more in the future if accessibility improvements were made

ACCESSIBILITY FACTORS TEND TO BE SEEN AS IMPORTANT BY ALL TYPES OF PASSENGERS – EASY TO USE TICKET MACHINES AND CLEAR ANNOUNCEMENTS AND SIGNAGE TOP THE LIST

quadrangle

All passengers, including lapsed passengers



Across the board, **older people** (aged 55+) are more likely to think these factors are important than younger people

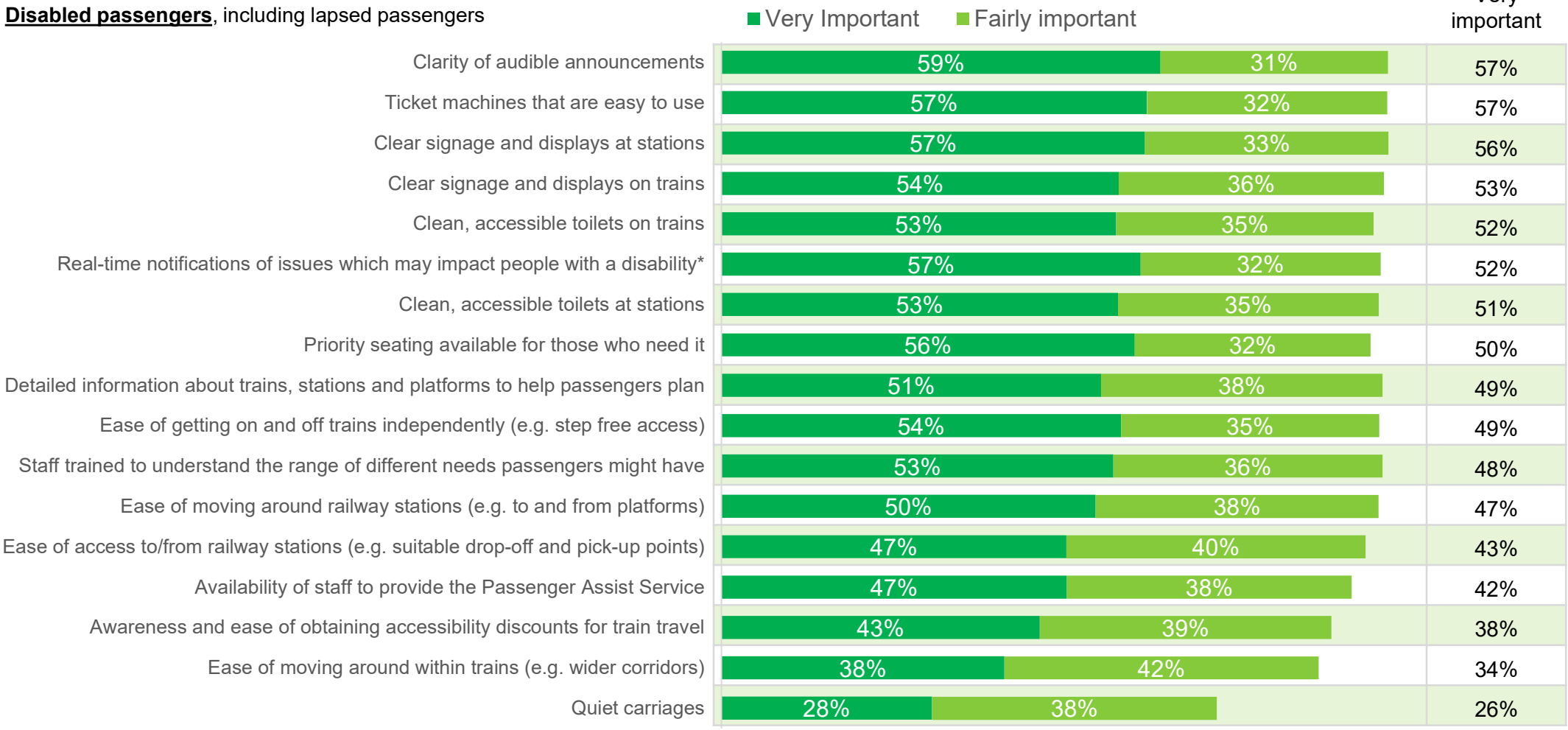
QC17. Overall, how would you rate the following in terms of importance when it comes to train travel and making it more accessible for passengers?
Base: All passengers, including lapsed passengers (n=15,226)

Exact wording
* *Real-time notifications of issues which may impact people with a disability (e.g. lifts or toilets out of order)*

DISABLED PASSENGERS ARE MARGINALLY MORE LIKELY THAN AVERAGE TO THINK THAT EACH OF THE ACCESSIBILITY FEATURES ARE VERY IMPORTANT TO TRAIN TRAVEL

quadrangle

Disabled passengers, including lapsed passengers



Of disabled passengers (passengers with sensory, learning, mental health or mobility related conditions or impairments) those with mobility issues are most likely to consider a range of these items as very important, including; ease of **getting on and off trains** (60% "very important"), **accessible clean toilets** (58%), **ease of moving around stations** (58%) and **real time notification of issues** which may impact disabled passengers (62%)

QC17. Overall, how would you rate the following in terms of importance when it comes to train travel and making it more accessible for passengers?
Base: All passengers with a disability, including lapsed passengers (n=4,816)

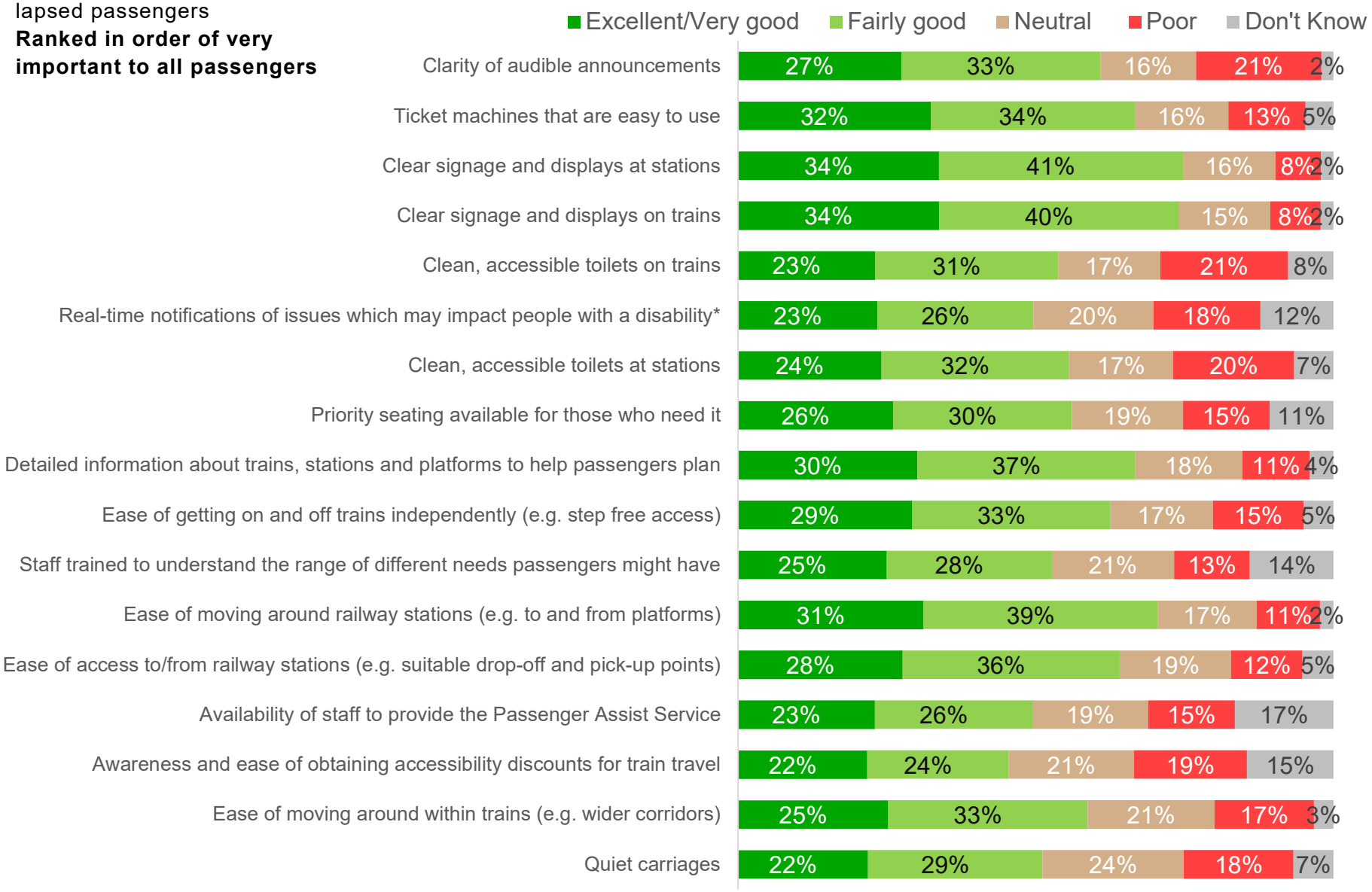
Exact wording
** Real-time notifications of issues which may impact people with a disability (e.g. lifts or toilets out of order)*

© Quadrangle 2022

MORE THAN ONE IN FIVE FIND THE CLARITY OF AUDIBLE ANNOUNCEMENTS AND TOILET PROVISION POOR. SIGNAGE IS GENERALLY WELL REGARDED

quadrangle

All passengers, including lapsed passengers
Ranked in order of very important to all passengers



© Quadrangle 2022

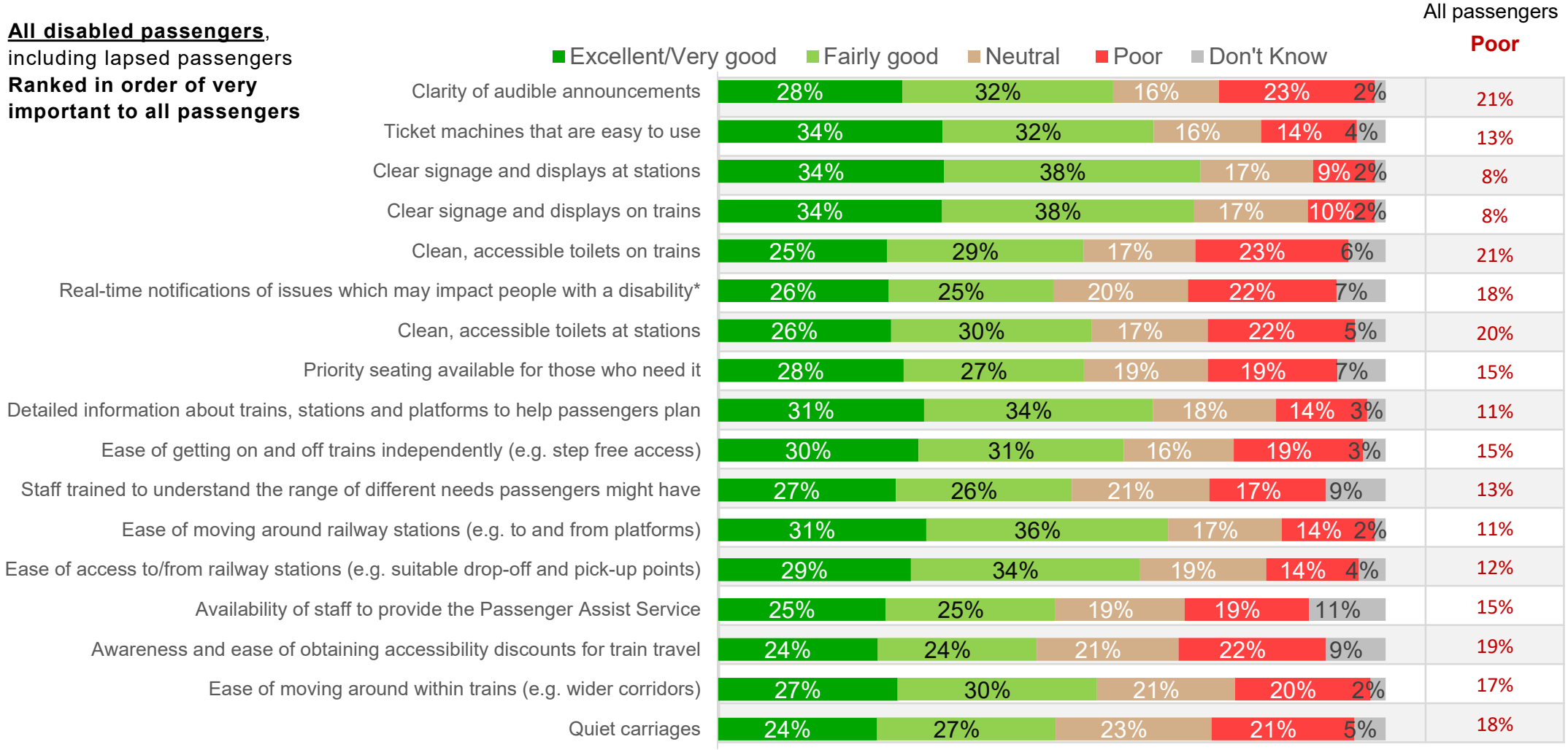
QC18. Now thinking about your overall experience of the railway and the journeys you make. How well do you think they are currently performing on each of the following?
Base: All, including lapsed passengers (n= 15,226)

Exact wording
* *Real-time notifications of issues which may impact people with a disability (e.g. lifts or toilets out of order)*

ONE IN FIVE DISABLED PASSENGERS RATE THE RAILWAY AS POOR FOR MANY ASPECTS OF ACCESSIBILITY – A LARGER PROPORTION THAN PASSENGERS AS A WHOLE

quadrangle

All disabled passengers, including lapsed passengers
Ranked in order of very important to all passengers



Passengers with **Sensory** and **Learning** disabilities often rate the railway *more* highly on many of these areas than the wider public
One quarter of those with **mobility** issues rate the ability to **get on and off trains independently and ease of moving around on trains** as poor (25% and 23% respectively)
A similar proportion of those with mobility issues (23%) rate the availability of staff to provide **Passenger Assist** as poor

© Quadrangle 2022

QC18. Now thinking about your overall experience of the railway and the journeys you make. How well do you think they are currently performing on each of the following?
Base: All, including lapsed passengers (n= 15,226)

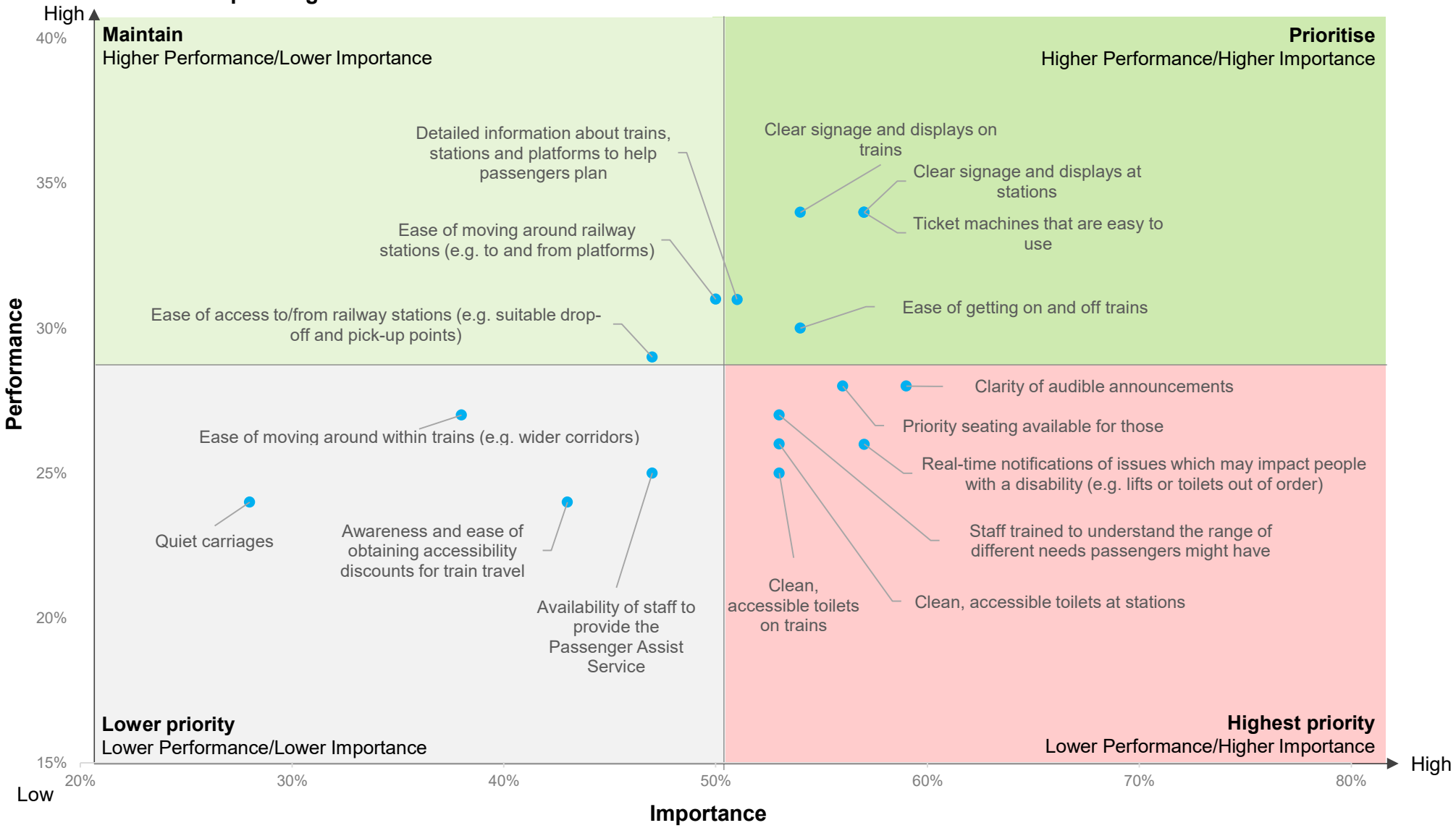
Exact wording
* *Real-time notifications of issues which may impact people with a disability (e.g. lifts or toilets out of order)*

IMPORTANCE VERSUS PERFORMANCE OF ACCESSIBILITY FEATURES FOR DISABLED PASSENGERS

quadrangle

THOSE ISSUES IN THE PINK BOX ARE OF GREATEST PRIORITY AS THEY ARE BOTH HIGHLY IMPORTANT AND WHERE THE RAILWAY PERFORMS LESS WELL E.G. CLEAN AND ACCESSIBLE TOILETS

All disabled passengers



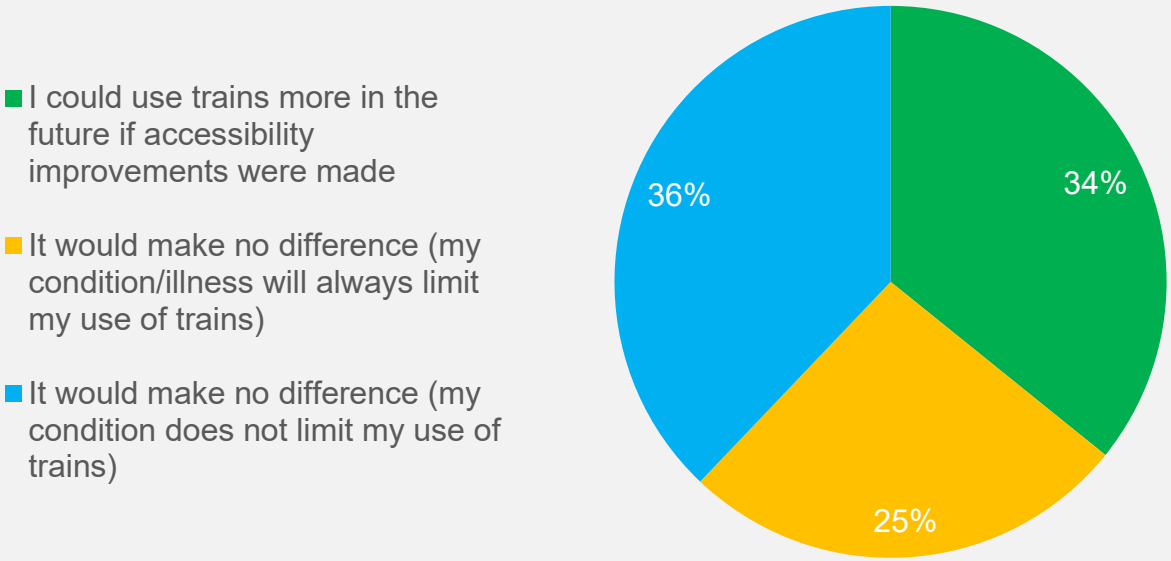
QC18. Now thinking about your overall experience of the railway and the journeys you make. How well do you think they are currently performing on each of the following? *Base: All with a disability (n= 4816)*

Performance = "Excellent" and "Very good" scores (1 or 2 out of 7)
Importance = "Very important" score (1 out of 5)

ONE-THIRD OF DISABLED PASSENGERS WOULD USE TRAINS MORE IN THE FUTURE IF ACCESSIBILITY IMPROVEMENTS WERE MADE

quadrangle

Impact of improvements to the accessibility of the railway on disabled passengers



Passengers with **Mobility** (43%) and **Learning** (42%) disabilities are most likely to say that accessibility improvements to the railway would mean they can use the railway more.

QC19. Earlier in the survey you mentioned that you are affected by a physical or mental health condition or illness. Please tell us whether, assuming accessibility were improved on the railway, this would have any impact on your rail travel.
Base: All with a disability (n= 4,816)

LAPSED PASSENGERS AND REDUCED RAIL TRAVEL

quadrangle

LAPSED PASSENGERS DEFINED AS THOSE WHO LAST TRAVELLED BY TRAIN BETWEEN FEBRUARY 2019 AND JULY 2021

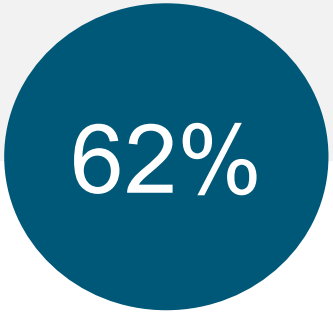
LAPSED PASSENGERS AND REDUCED RAIL TRAVEL - HEADLINES

quadrangle

LAST TRAVELLED BY TRAIN BETWEEN FEBRUARY 2019 AND JULY 2021

01

Cheaper fares are the most significant factor in encouraging lapsed passengers back to train travel. The cost-of-living crisis is likely making value for money a more important factor



say this is very likely to increase the amount that they travel by train

02

The rise in home-working is a significant driver for those who have lapsed or reduced their train travel (especially in the Southern and Eastern regions)

of lapsed passengers and those who are travelling less by train, say that working from home more explains why they have stopped or reduced the amount they commute by train

03

Some lapsed passengers are reluctant to return to train travel and tell us spontaneously that they want mask-wearing to be more widespread

Now, following the Covid-19 pandemic, fewer than one in three lapsed passengers feel positive about train travel

© Quadrangle 2022

ALMOST TWO-THIRDS OF LAPSED RAIL PASSENGERS SAY THAT CHEAPER FARES WOULD BE VERY LIKELY TO ENCOURAGE THEM TO TRAVEL BY RAIL

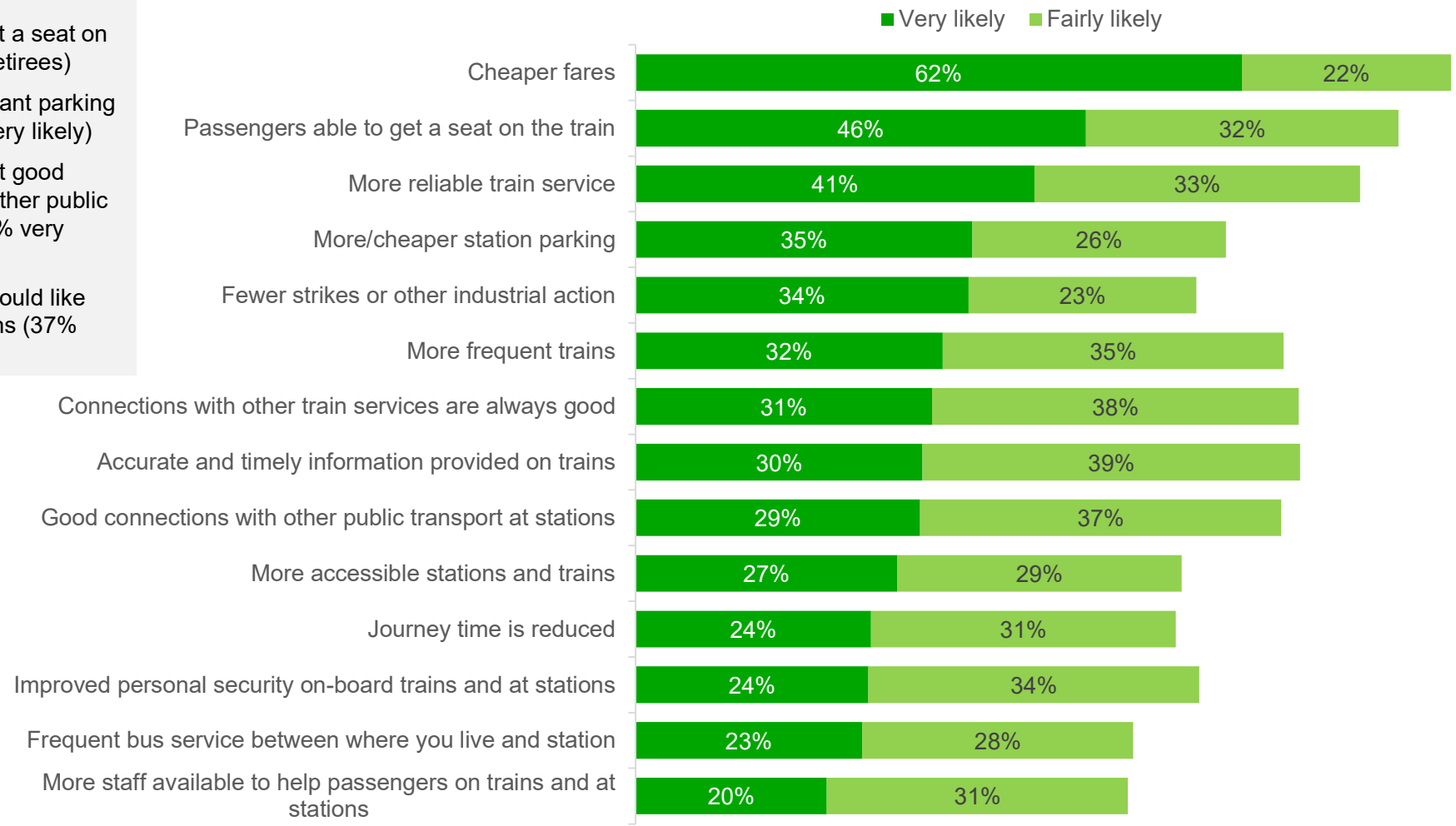
quadrangle

Lapsed passengers last travelled by train between February 2019 and July 2021

What would encourage specific groups to travel by rail:

- **Older people** want a seat on the train (51% of retirees)
- **25-34 year olds** want parking at stations (45% very likely)
- **C2s and DEs** want good connections with other public transport (34%/33% very likely)
- **18-24 year olds** would like more frequent trains (37% very likely)

Likely to encourage travel by train (ranked high-low)



© Quadrangle 2022

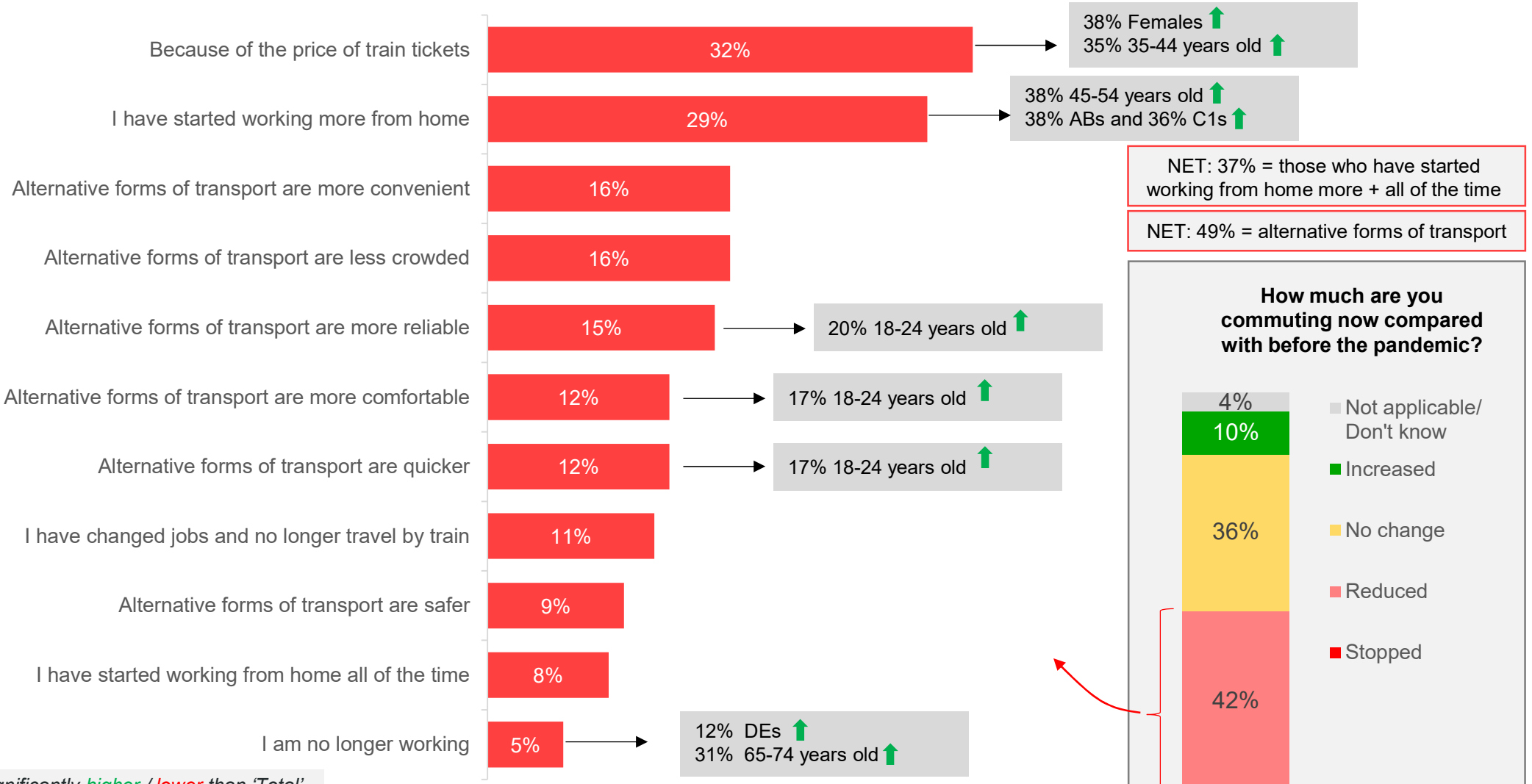
QA5. Below is a list of possible changes to the rail service, for each statement, please rate how likely or unlikely each would be to encourage you to travel by rail.
Base: All lapsed passengers (n=2,661)

AROUND HALF OF COMMUTERS HAVE REDUCED THE FREQUENCY OR STOPPED COMMUTING. ONE-THIRD CITE THE REASON BEING THE PRICE OF TICKETS, WHILE A SIMILAR PROPORTION ARE WORKING FROM HOME MORE

quadrangle

Lapsed passengers last travelled by train between February 2019 and July 2021

Why stopped or reduced the amount of travel by train for commuting



NET: 37% = those who have started working from home more + all of the time

NET: 49% = alternative forms of transport

How much are you commuting now compared with before the pandemic?

Significantly higher / lower than 'Total' at 95% level

QA1.1. Commuting: How much are you travelling by train now compared with before the pandemic (in the period up to the first Coronavirus lockdown in early 2020)
Base: Commuters (n=6,760)
QA2a. Why have you stopped, or reduced, the amount that you commute by train?
Base: All stopped commuting, or commuting less (n=3,358)

© Quadrangle 2022

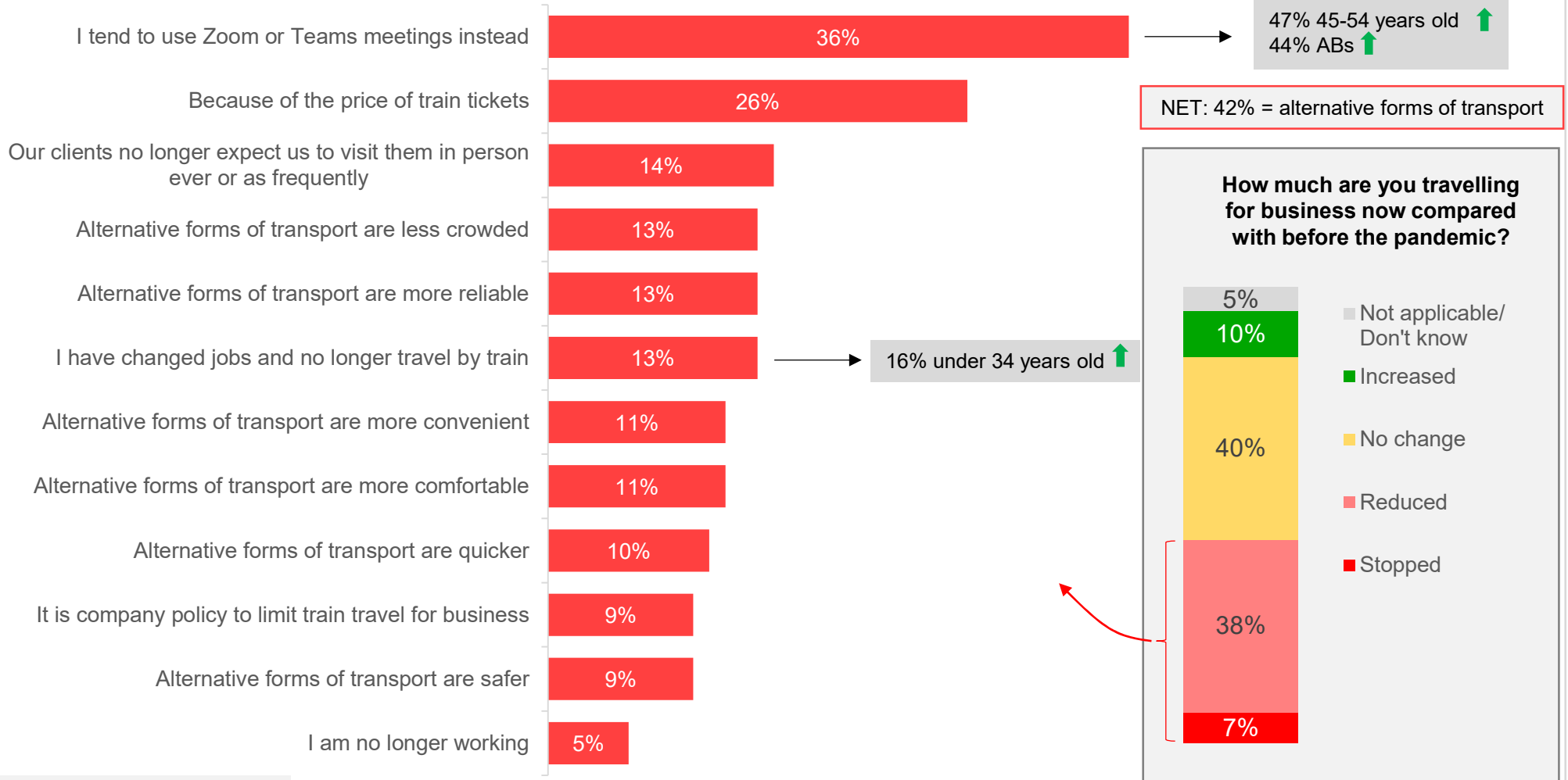
ONE-THIRD OF BUSINESS TRAVELLERS ARE TRAVELLING LESS OR HAVE STOPPED TRAVELLING FOR BUSINESS BECAUSE THEY ARE TENDING TO USE VIDEO CALLS INSTEAD

quadrangle

Lapsed passengers last travelled by train between February 2019 and July 2021

A FURTHER QUARTER SAY THEY ARE TRAVELLING LESS BECAUSE OF THE PRICE OF TICKETS

Why stopped or reduced the amount of travel by train for business trips



Significantly higher / lower than 'Total' (market average) at 95% level

QA1.2 Business travel: How much are you travelling by train now compared with before the pandemic (in the period up to the first Coronavirus lockdown in early 2020)
Base: Business passengers (n=5,783)
QA2a. Why have you stopped, or reduced, the amount that you travel by train for business?
Base: All stopped travelling for business by rail, or travelling less (n=2,613)

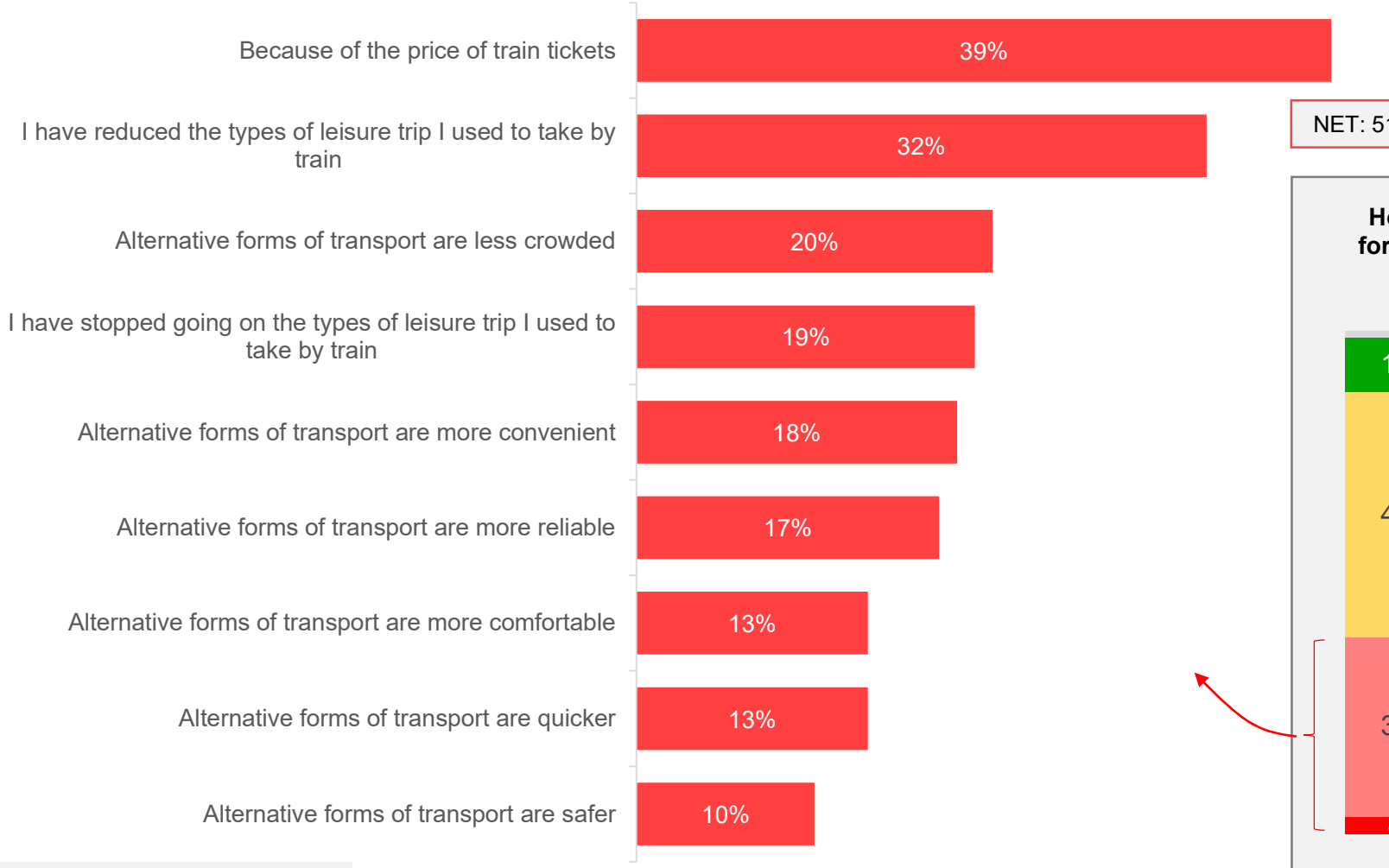
© Quadrangle 2022

THE COST OF TRAIN TICKETS IS THE MAIN REASON WHY LEISURE PASSENGERS HAVE STOPPED OR REDUCED THE AMOUNT THEY TRAVEL BY TRAIN

quadrangle

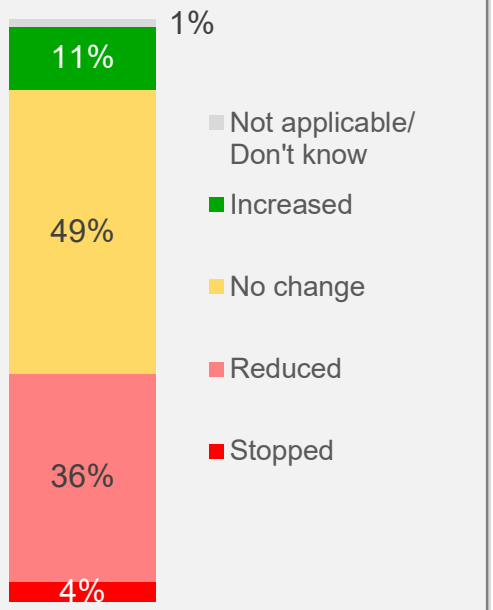
Lapsed passengers last travelled by train between February 2019 and July 2021

Why stopped or reduced the amount of travel by train for leisure journeys



NET: 51% = alternative forms of transport

How much are you travelling for leisure now compared with before the pandemic?



Significantly higher / lower than 'Total' (market average) at 95% level

QA1.3 Leisure travel: How much are you travelling by train now compared with before the pandemic (in the period up to the first Coronavirus lockdown in early 2020)
Base: Leisure passengers (n=12,258)
QA2a. Why has the amount you travel by train for Leisure stopped or reduced?
Base: All stopped leisure travel by rail, or travelling less (n=4,866)

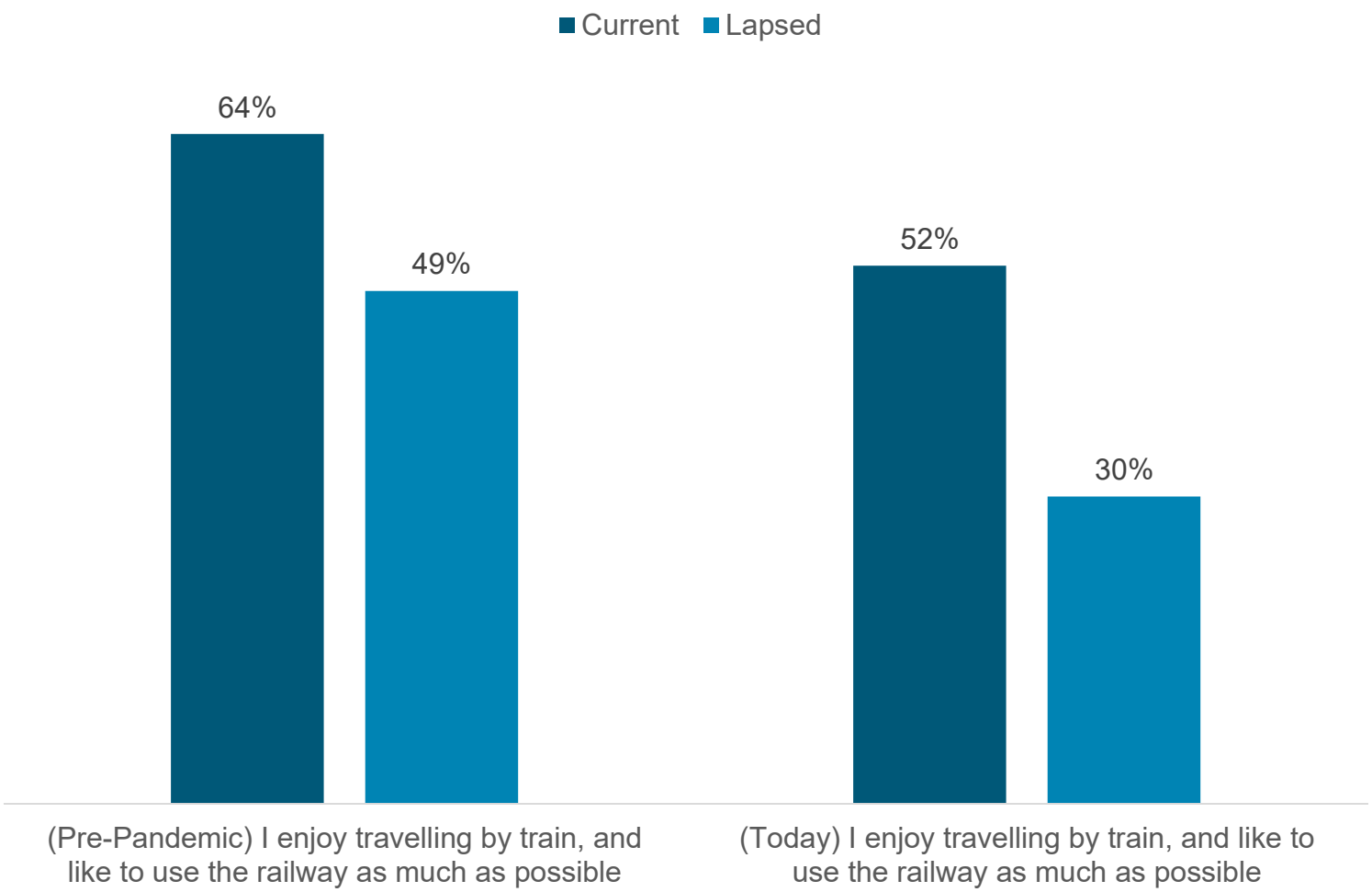
© Quadrangle 2022

LAPSED PASSENGERS ARE SIGNIFICANTLY LESS POSITIVE TOWARDS TRAIN TRAVEL SINCE THE START OF THE PANDEMIC WITH SAFETY BEING TOP OF MIND

quadrangle

Lapsed passengers last travelled by train between February 2019 and July 2021

Agree (Strongly/tend to agree)



The aftermath of Covid-19 Is a significant barrier to returning to train travel for Lapsed passengers

"I am still not in my normal routine and travel plans since Covid. I will travel when I feel it is safe. It may encourage me to travel if I knew what if any Covid safety measures are in place on the trains and stations"

"Covid prevention measures. There were 921 deaths due to Covid in the past week yet nobody seems to be wearing masks in public places, like trains. I will continue to avoid public transport for the foreseeable future"

QA4. You have said that you haven't used the railway for the past 12 months. Is there one thing which would encourage you to travel by rail more in the future?

© Quadrangle 2022

QA3. a) Firstly, prior to the Coronavirus pandemic at the start of 2020, to what extent would you have agreed or disagreed with the following
b) And secondly, how much would you agree with the same statement today?
.Base: All current passengers (n=12,565) and lapsed passengers (n=2,447)

quadrangle

quadrangle

WHAT MATTERS TO PASSENGERS IS BROADLY SIMILAR BETWEEN NATIONS – BUT PASSENGERS IN WALES AND SCOTLAND PLACE GREATER IMPORTANCE ON SEATING ON TRAINS

quadrangle

QUICK JOURNEY TIMES IS OF SLIGHTLY LESS IMPORTANCE IN WALES

Ranked High-Low importance for all current passengers

Nations	All	England	Scotland	Wales
Price of train tickets offers value for money	215	214	225	217
Reliability and punctuality	213	212	220	212
Sufficiently frequent trains	148	148	156	146
Accurate and timely information about train times	143	143	143	144
Getting a seat on the train	143	141	154	152
My personal security on the train	136	137	131	135
Being kept informed about delays and the options I might have	135	136	129	132
My personal security at stations	118	119	111	117
Quick journey times	112	113	109	98
Inside of trains being clean and well-maintained	107	106	113	115
A railway that can cope with adverse weather events*	104	104	107	92
Easy to buy the right ticket	98	98	97	100
Trains and stations easily accessible by older and disabled people**	94	95	93	91
Good connections with other train services	81	82	74	81
Engineering works planned to keep passenger disruption to a minimum	80	82	72	72
Comfortable seats on trains	80	79	86	86
Good connections with other public transport at stations	76	77	69	74
Well-maintained, clean toilets on the train	75	73	81	84
An environmentally responsible railway that is reducing its carbon emissions	60	60	60	61
Helpful staff at stations	56	56	54	59
Stations being clean and well-maintained	54	54	54	58
Helpful staff on trains	52	51	52	56
Reliable Wi-Fi and mobile reception on trains	44	44	44	44
Easy to claim compensation when delayed	40	41	33	34
Sufficient space on the train for luggage	36	36	34	39
Base	*12,565*	*11,043*	*1,000*	*522*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

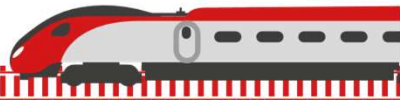
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

What matters to rail passengers in Great Britain 2022

quadrangle

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



transportfocus

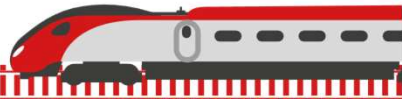
11. A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)
12. Easy to buy the right ticket
13. Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.
14. Good connections with other train services
15. Engineering works planned to keep passenger disruption to a minimum
16. Comfortable seats on trains
17. Good connections with other public transport at stations
18. Well-maintained, clean toilets on the train
19. An environmentally responsible railway that is reducing its carbon emissions
20. Helpful staff at stations
21. Stations being clean and well-maintained
22. Helpful staff on trains
23. Reliable Wi-Fi and mobile reception on trains
24. Easy to claim compensation when delayed
25. Sufficient space on the train for luggage

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

What matters to rail passengers in England 2022

quadrangle

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



transportfocus

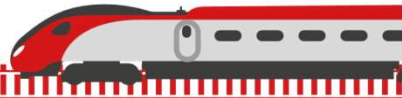
11. A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)
12. Easy to buy the right ticket
13. Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.
14. Good connections with other train services
15. Engineering works planned to keep passenger disruption to a minimum
16. Comfortable seats on trains
17. Good connections with other public transport at stations
18. Well-maintained, clean toilets on the train
19. An environmentally responsible railway that is reducing its carbon emissions
20. Helpful staff at stations
21. Stations being clean and well-maintained
22. Helpful staff on trains
23. Reliable Wi-Fi and mobile reception on trains
24. Easy to claim compensation when delayed
25. Sufficient space on the train for luggage

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

What matters to rail passengers in Scotland 2022

quadrangle

1. Price of train tickets offers value for money
2. Reliability and punctuality
3. Sufficiently frequent trains
4. Getting a seat on the train
5. Accurate and timely information about train times
6. My personal security on the train
7. Being kept informed about delays and the options I might have
8. Inside of trains being clean and well-maintained
9. My personal security at stations
10. Quick journey times



transportfocus

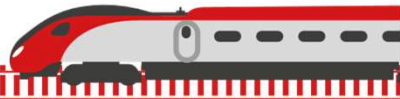
11. A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)
12. Easy to buy the right ticket
13. Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.
14. Comfortable seats on trains
15. Well-maintained, clean toilets on the train
16. Good connections with other train services
17. Engineering works planned to keep passenger disruption to a minimum
18. Good connections with other public transport at stations
19. An environmentally responsible railway that is reducing its carbon emissions
20. Helpful staff at stations
21. Stations being clean and well-maintained
22. Helpful staff on trains
23. Reliable Wi-Fi and mobile reception on trains
24. Sufficient space on the train for luggage
25. Easy to claim compensation when delayed

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

What matters to rail passengers in Wales 2022

quadrangle

1. Price of train tickets offers value for money
2. Reliability and punctuality
3. Getting a seat on the train
4. Sufficiently frequent trains
5. Accurate and timely information about train times
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. Inside of trains being clean and well-maintained
10. Easy to buy the right ticket



transportfocus

11. Quick journey times
12. A railway that can cope with adverse weather events (snow, wind, flooding and extreme heat)
13. Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.
14. Comfortable seats on trains
15. Well-maintained, clean toilets on the train
16. Good connections with other train services
17. Good connections with other public transport at stations
18. Engineering works planned to keep passenger disruption to a minimum
19. An environmentally responsible railway that is reducing its carbon emissions
20. Helpful staff at stations
21. Stations being clean and well-maintained
22. Helpful staff on trains
23. Reliable Wi-Fi and mobile reception on trains
24. Sufficient space on the train for luggage
25. Easy to claim compensation when delayed

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

quadrangle

- GENDER
- AGE
- ETHNICITY
- GOVERNMENT REGION
- DISABILITY

SUMMARY – DEMOGRAPHIC IMPACTS ON WHAT MATTERS TO PASSENGERS

quadrangle

GENDER

Personal security is particularly important to females. Whereas the speed of the journey is of higher importance to males

AGE

Age has a significant influence on what matters to passengers. Those aged over 45 place greater importance on value for money and reliability and punctuality

Environmental factors, including the ability for the railway to cope with adverse weather are more important to younger passengers

Overall, perceived performance of the railway tends to decrease with age

ETHNIC ORIGIN

White British passengers are more likely than average to say value for money and reliability are particularly important to them. Passengers from an ethnic minority background place greater importance on a range of factors. However, there is a smaller proportion of Leisure passengers among ethnic minority travellers, and this may have more of an influence on their views than their ethnicity

GOVERNMENT REGION

Londoners are the most likely to have different expectations for rail travel compared with passengers from other regions. Quick journey times and connections with other trains or forms of transport are more important to them than average, while getting a seat is less important

DISABILITY

Disabled passengers tend to have a broader range of expectations to the rest of the population. Having trains and stations that are accessible for all passengers is more important than average, especially for those with a mobility disability. Overall, value for money and reliability are slightly less important than for the wider population

WHAT MATTERS BY GENDER AND AGE

quadrangle

PERSONAL SECURITY ON TRAINS AND STATIONS IS MORE IMPORTANT FOR FEMALES THAN MALES. VALUE FOR MONEY AND RELIABILITY MATTERS MORE TO THOSE AGED OVER 45, WHILE GETTING A (COMFORTABLE) SEAT INCREASES IN IMPORTANCE WITH AGE. IN CONTRAST, THE ENVIRONMENT AND A RAILWAY THAT CAN COPE WITH ADVERSE WEATHER ARE MORE IMPORTANT TO YOUNGER PEOPLE

Ranked High-Low importance for all current passengers

	All	Male	Female	18-24	25-34	35-44	45-54	55-64	65-74	75+
Price of train tickets offers value for money	215	212	220	172	201	217	232	237	230	229
Reliability and punctuality	213	210	217	167	194	207	226	241	246	232
Sufficiently frequent trains	148	154	143	125	137	144	157	165	168	152
Accurate and timely information about train times	143	139	147	140	144	142	143	144	147	136
Getting a seat on the train	143	144	142	95	110	132	156	177	195	201
My personal security on the train	136	118	157	124	138	145	139	141	128	112
Being kept informed about delays and the options I might have	135	128	143	146	142	135	130	129	128	128
My personal security at stations	118	102	137	114	124	128	119	119	105	90
Quick journey times	112	123	100	110	109	113	123	114	107	92
Inside of trains being clean and well-maintained	107	106	108	97	101	104	107	111	121	123
A railway that can cope with adverse weather events*	104	105	101	123	110	103	97	97	95	87
Easy to buy the right ticket	98	105	91	98	94	96	99	99	104	107
Trains and stations easily accessible by older and disabled people**	94	83	108	113	111	98	79	74	83	115
Good connections with other train services	81	85	77	87	89	86	80	74	69	68
Engineering works planned to keep passenger disruption to a minimum	80	82	78	94	87	80	79	74	67	65
Comfortable seats on trains	80	87	71	65	65	75	84	91	104	109
Good connections with other public transport at stations	76	79	72	86	86	81	73	65	60	62
Well-maintained, clean toilets on the train	75	76	73	76	76	73	72	70	79	89
An environmentally responsible railway that is reducing its carbon emissions	60	62	57	90	68	59	52	48	40	46
Helpful staff at stations	56	56	56	66	58	56	50	51	51	62
Stations being clean and well-maintained	54	56	51	66	59	55	50	47	48	52
Helpful staff on trains	52	53	51	61	54	51	47	48	48	60
Reliable Wi-Fi and mobile reception on trains	44	51	36	68	52	47	41	31	24	22
Easy to claim compensation when delayed	40	46	33	65	48	40	35	28	23	25
Sufficient space on the train for luggage	36	40	31	54	42	34	30	24	28	36
Bases	*12,565*	*5,984*	*6,509*	*1,569*	*2,928*	*2,720*	*1,686*	*1,889*	*1,391*	*382*

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

PERCEIVED PERFORMANCE OF THE RAILWAY DECREASES WITH AGE

quadrangle

OLDER PEOPLE TEND TO SCORE THE RAILWAY LESS POSITIVELY THAN YOUNGER PASSENGERS – EXCEPTIONS INCLUDE THE ABILITY TO GET A SEAT ON A TRAIN, PERSONAL SECURITY AND ACCURATE AND TIMELY INFORMATION

Ranked High-Low importance for all current passengers

Importantly, while older people are less likely to be strongly positive, they are also less likely to think that the railway is poor in most of these areas. Instead, they are more likely to be mildly positive or neutral, and, in some cases, to not have an opinion (e.g. in respect of environmental issues)

Passengers rating the Railway as **"Excellent" or "Very good"** (on 7 point scale)	All	18-34	35-54	55+
Price of train tickets offers value for money	21%	25%	21%	16%
Reliability and punctuality	31%	33%	31%	29%
Sufficiently frequent trains	31%	34%	31%	26%
Getting a seat on the train	34%	34%	33%	35%
Accurate and timely information about train times	37%	38%	37%	36%
My personal security on the train	36%	35%	36%	36%
Being kept informed about delays and the options I might have	29%	33%	29%	23%
My personal security at stations	35%	35%	35%	35%
Quick journey times	34%	36%	33%	32%
Inside of trains being clean and well-maintained	33%	34%	33%	32%
A railway that can cope with adverse weather events*	19%	25%	20%	10%
Easy to buy the right ticket	40%	45%	41%	34%
Trains and stations easily accessible by older and disabled people**	27%	31%	27%	20%
Comfortable seats on trains	31%	32%	32%	31%
Good connections with other train services	30%	35%	31%	24%
Engineering works planned to keep passenger disruption to a minimum	20%	26%	21%	13%
Well-maintained, clean toilets on the train	22%	26%	23%	17%
Good connections with other public transport at stations	31%	36%	32%	24%
An environmentally responsible railway that is reducing its carbon emissions	19%	23%	20%	13%
Helpful staff at stations	35%	36%	36%	34%
Stations being clean and well-maintained	33%	33%	33%	32%
Helpful staff on trains	33%	33%	33%	31%
Reliable Wi-Fi and mobile reception on trains	22%	26%	22%	18%
Easy to claim compensation when delayed	18%	23%	18%	13%
Sufficient space on the train for luggage	25%	29%	25%	20%
Base	*12,565*	*4,497*	*4,406*	*3,662*

Don't know responses excluded

QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

ETHNIC MINORITY PASSENGERS OFTEN PLACE A LOWER IMPORTANCE ON VALUE FOR MONEY AND RELIABILITY AND PUNCTUALITY THAN WHITE PASSENGERS

quadrangle

A SMALLER PROPORTION OF ETHNIC MINORITIES ARE LEISURE PASSENGERS WHERE WE SEE VALUE FOR MONEY AND RELIABILITY ARE PARTICULARLY IMPORTANT

Ranked High-Low importance for all current passengers

Ethnicity of passenger	All	English/ Scottish/ Welsh/NI /British	Irish	Other White back-ground	White and Black Caribbean	White and Black African	White and Asian	Indian	Pakistani	Bang-ladeshi	Chinese	African	Caribbean
Price of train tickets offers value for money	215	222	215	204	181	176	178	183	169	166	199	152	188
Reliability and punctuality	213	219	214	209	173	158	183	185	164	168	215	171	193
Sufficiently frequent trains	148	152	154	153	125	118	131	128	108	123	159	114	145
Accurate and timely information about train times	143	144	139	146	135	133	137	131	129	140	148	138	153
Getting a seat on the train	143	151	160	102	111	103	119	114	108	81	112	79	100
My personal security on the train	136	136	145	147	134	129	129	129	125	121	134	141	118
Being kept informed about delays and the options I might have	135	135	126	138	138	137	138	125	133	142	135	141	149
My personal security at stations	118	117	125	132	119	117	115	115	113	110	120	132	109
Quick journey times	112	112	115	125	106	107	106	118	101	107	143	103	125
Inside of trains being clean and well-maintained	107	107	110	97	102	102	108	105	106	111	103	106	100
A railway that can cope with adverse weather events*	104	101	107	108	111	106	133	122	115	128	120	132	115
Easy to buy the right ticket	98	100	87	88	102	100	81	96	98	81	75	83	99
Trains and stations easily accessible by older and disabled people**	94	92	90	100	112	109	106	103	109	109	74	118	103
Good connections with other train services	81	79	75	102	83	90	89	87	92	86	102	93	101
Engineering works planned to keep passenger disruption to a minimum	80	79	77	83	90	93	89	82	85	98	84	100	79
Comfortable seats on trains	80	82	84	61	73	60	73	80	76	67	65	65	57
Good connections with other public transport at stations	76	72	67	102	82	97	85	85	94	84	95	92	95
Well-maintained, clean toilets on the train	75	74	78	71	77	82	76	83	91	72	69	83	80
An environmentally responsible railway that is reducing its carbon emissions	60	56	59	65	83	93	75	86	81	69	57	91	71
Helpful staff at stations	56	55	53	51	71	69	63	51	66	72	47	62	57
Stations being clean and well-maintained	54	52	50	54	64	67	66	64	69	82	58	71	62
Helpful staff on trains	52	51	52	46	68	62	58	48	66	70	43	55	54
Reliable Wi-Fi and mobile reception on trains	44	40	48	41	62	71	53	66	79	86	51	69	57
Easy to claim compensation when delayed	40	37	42	42	51	67	63	64	67	71	51	60	47
Sufficient space on the train for luggage	36	34	30	34	47	52	47	47	55	57	41	49	42
Base	*12,565*	*10,347*	*98*	*482*	*111*	*76*	*106*	*213*	*179*	*92*	*78*	*280*	*131*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.

Note: Small base sizes<100 for Irish, White and Black African, Bangladeshi, and Chinese

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

LONDONERS ARE MORE LIKELY TO HAVE SLIGHTLY DIFFERENT EXPECTATIONS WHEN IT COMES TO RAIL TRAVEL

quadrangle

Ranked High-Low importance for all current passengers

Home region of passenger	All	East of England	East Midlands	London	North East	North West	Scotland	South East	South West	Wales	West Midlands	Yorks and the Humber
Price of train tickets offers value for money	215	232	226	180	229	217	225	226	227	217	208	224
Reliability and punctuality	213	219	202	198	212	216	220	222	216	212	211	219
Sufficiently frequent trains	148	151	133	151	130	153	156	151	142	146	147	149
Accurate and timely information about train times	143	145	139	138	137	143	143	148	141	144	146	144
Getting a seat on the train	143	140	156	114	159	150	154	140	163	152	142	157
My personal security on the train	136	137	138	136	132	141	131	140	131	135	140	132
Being kept informed about delays and the options I might have	135	139	131	132	133	137	129	141	135	132	137	135
My personal security at stations	118	119	119	122	113	122	111	121	111	117	122	112
Quick journey times	112	112	104	127	101	111	109	114	105	98	111	108
Inside of trains being clean and well-maintained	107	106	111	102	109	104	113	107	108	115	104	107
A railway that can cope with adverse weather events*	104	106	96	113	100	100	107	104	96	92	103	97
Easy to buy the right ticket	98	99	109	83	109	96	97	103	100	100	102	108
Trains and stations easily accessible by older and disabled people**	94	91	93	98	100	94	93	93	97	91	95	96
Good connections with other train services	81	83	79	96	73	80	74	77	76	81	79	77
Engineering works planned to keep passenger disruption to a minimum	80	88	71	91	74	80	72	82	75	72	76	77
Comfortable seats on trains	80	75	87	71	92	81	86	76	86	86	80	84
Good connections with other public transport at stations	76	75	74	95	67	73	69	70	68	74	73	70
Well-maintained, clean toilets on the train	75	73	81	72	79	71	81	71	78	84	71	75
An environmentally responsible railway that is reducing its carbon emissions	60	54	63	72	55	53	60	53	59	61	62	54
Helpful staff at stations	56	51	54	56	57	56	54	55	56	59	59	56
Stations being clean and well-maintained	54	50	56	61	54	50	54	52	52	58	55	52
Helpful staff on trains	52	46	51	52	55	53	52	50	54	56	55	52
Reliable Wi-Fi and mobile reception on trains	44	37	45	51	46	44	44	39	48	44	45	39
Easy to claim compensation when delayed	40	39	42	47	43	40	33	37	37	34	39	39
Sufficient space on the train for luggage	36	31	39	39	41	36	34	29	37	39	37	38
Base	*12,565*	*1,122*	*839*	*1,913*	*538*	*1,468*	*1,000*	*1,999*	*919*	*522*	*1,195*	*1,050*

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

MXD1 Please tell us which of the items are most important to you when travelling by train.

WHAT MATTERS BY DISABILITY

A BROADER RANGE OF EXPECTATIONS MATTER TO DISABLED PASSENGERS THAN THE REST OF THE POPULATION – VALUE FOR MONEY AND RELIABILITY ARE SLIGHTLY LESS IMPORTANT

quadrangle

Ranked High-Low importance for all current passengers

		Disability				
	All	None	Sensory	Mobility	Mental Health	Learning
Price of train tickets offers value for money	215	224	183	193	207	181
Reliability and punctuality	213	223	176	187	198	167
Sufficiently frequent trains	148	157	127	125	135	118
Accurate and timely information about train times	143	148	124	124	142	127
Getting a seat on the train	143	147	132	157	126	119
My personal security on the train	136	137	122	136	142	126
Being kept informed about delays and the options I might have	135	137	126	123	141	131
My personal security at stations	118	118	109	119	126	113
Quick journey times	112	119	103	89	98	93
Inside of trains being clean and well-maintained	107	107	105	110	103	103
A railway that can cope with adverse weather events*	104	102	109	99	111	111
Easy to buy the right ticket	98	100	98	91	95	101
Trains and stations easily accessible by older and disabled people**	94	81	116	147	119	126
Good connections with other train services	81	81	84	80	81	88
Engineering works planned to keep passenger disruption to a minimum	80	80	84	73	82	86
Comfortable seats on trains	80	80	87	90	70	75
Good connections with other public transport at stations	76	74	81	76	77	87
Well-maintained, clean toilets on the train	75	71	88	86	74	87
An environmentally responsible railway that is reducing its carbon emissions	60	54	76	64	72	87
Helpful staff at stations	56	51	69	72	61	74
Stations being clean and well-maintained	54	51	65	59	57	65
Helpful staff on trains	52	47	67	68	56	70
Reliable Wi-Fi and mobile reception on trains	44	41	61	47	51	63
Easy to claim compensation when delayed	40	38	54	39	41	52
Sufficient space on the train for luggage	36	32	55	45	36	51
Base	*12,565*	*8,406*	*864*	*1,459*	*1,756*	*709*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

GWR

quadrangle

Commuters

Commuters prioritise getting to work. Their expectations centre around reliable, frequent trains, quick journeys, information provision, communication and strong connections with other services

Business travellers

Business passengers have similar expectations to commuters. However, some of the more peripheral expectations for other passengers are more important including connections with other services, and an environmentally responsible railway with reliable Wi-Fi on trains

Leisure

Leisure passengers tend to have 'simpler' expectations of the railway - above all, they want value for money, reliability and to get a seat on the train

Personal Business

The needs of those on Personal Business closely reflect the average for all journey types

© Quadrangle 2022

WHAT MATTERS TO PASSENGERS BY JOURNEY PURPOSE

LEISURE PASSENGERS HAVE A NARROWER RANGE OF EXPECTATIONS, ESPECIALLY VALUE FOR MONEY, RELIABILITY AND GETTING A SEAT. BUSINESS PASSENGERS IN PARTICULAR, HAVE A BROADER RANGE OF EXPECTATIONS AROUND WHAT THEY WANT FROM THE RAILWAY

Ranked High-Low importance for all current passengers

	All	Commuters	Business	Leisure	Personal Business
Price of train tickets offers value for money	215	204	184	240	199
Reliability and punctuality	213	204	191	230	203
Sufficiently frequent trains	148	148	140	153	147
Accurate and timely information about train times	143	142	135	146	144
Getting a seat on the train	143	126	124	164	128
My personal security on the train	136	137	122	143	133
Being kept informed about delays and the options I might have	135	136	132	135	137
My personal security at stations	118	121	109	122	117
Quick journey times	112	117	124	105	113
Inside of trains being clean and well-maintained	107	102	100	113	103
A railway that can cope with adverse weather events*	104	115	113	93	107
Easy to buy the right ticket	98	92	93	104	94
Trains and stations easily accessible by older and disabled people**	94	97	95	90	102
Good connections with other train services	81	86	93	72	88
Engineering works planned to keep passenger disruption to a minimum	80	86	89	73	85
Comfortable seats on trains	80	71	80	86	74
Good connections with other public transport at stations	76	81	89	65	84
Well-maintained, clean toilets on the train	75	73	78	74	74
An environmentally responsible railway that is reducing its carbon emissions	60	64	71	50	67
Helpful staff at stations	56	58	57	53	58
Stations being clean and well-maintained	54	56	60	50	57
Helpful staff on trains	52	54	54	49	54
Reliable Wi-Fi and mobile reception on trains	44	48	67	30	50
Easy to claim compensation when delayed	40	47	54	29	44
Sufficient space on the train for luggage	36	37	46	30	39
Base	*12,565*	*2,329*	*2,323*	*5,576*	*2,337*

MXD1 Please tell us which of the items are most important to you when travelling by train.

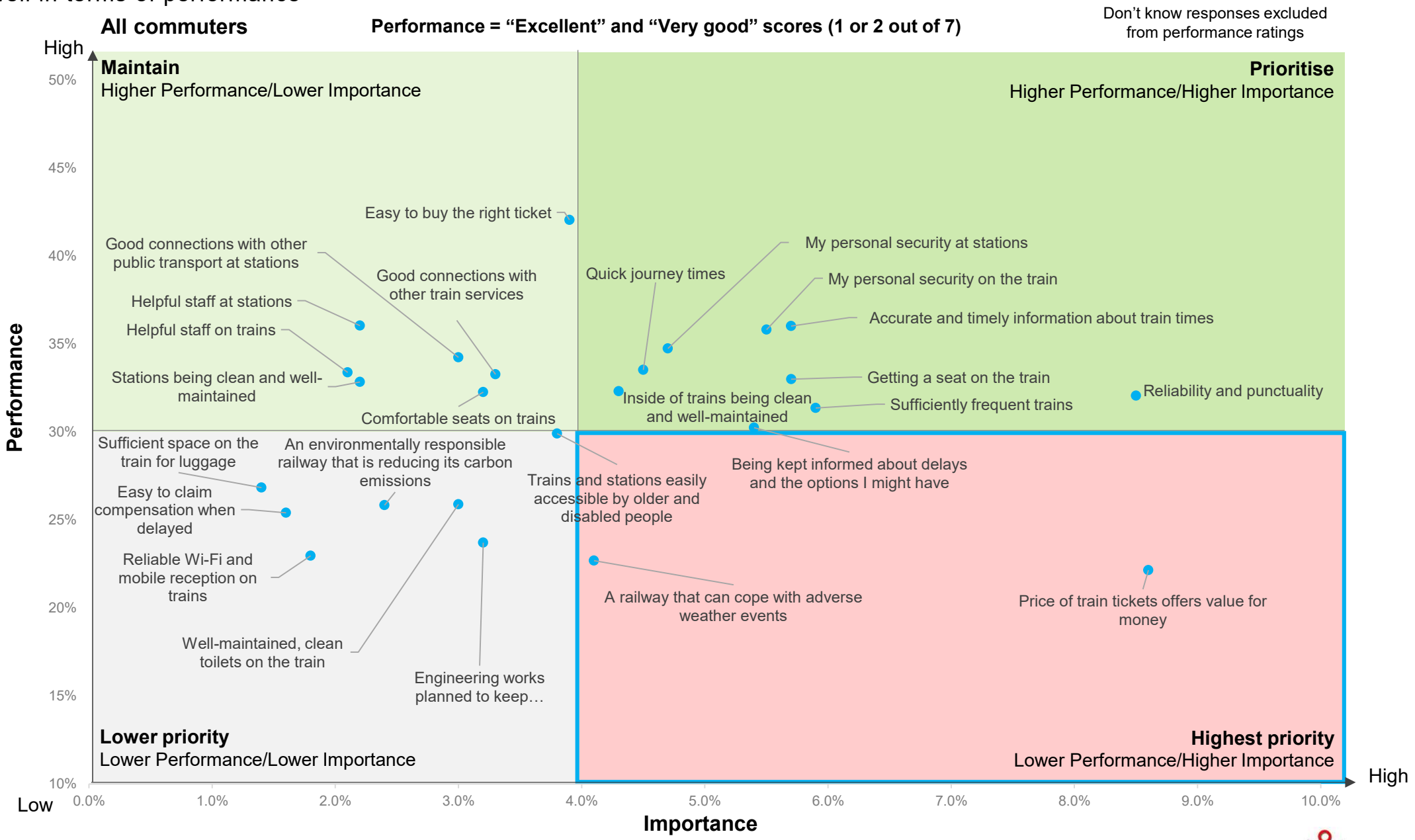
Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – COMMUTERS

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

December 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: Commuters (n=2,329)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

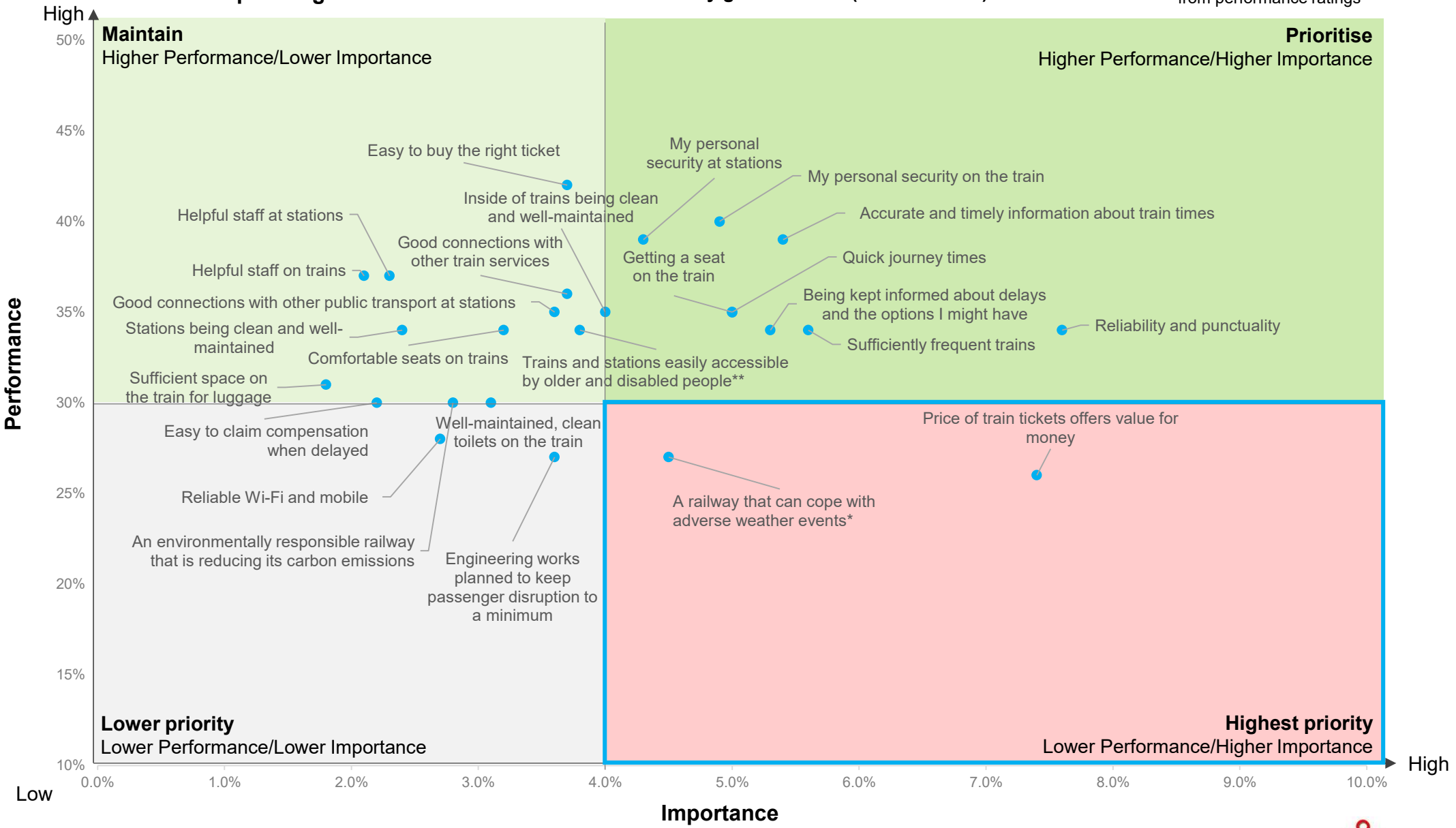
IMPORTANCE VERSUS PERFORMANCE – BUSINESS PASSENGERS

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance

All business passengers **Performance = "Excellent" and "Very good" scores (1 or 2 out of 7)**

Don't know responses excluded from performance ratings



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: Business passengers (n=2,323)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

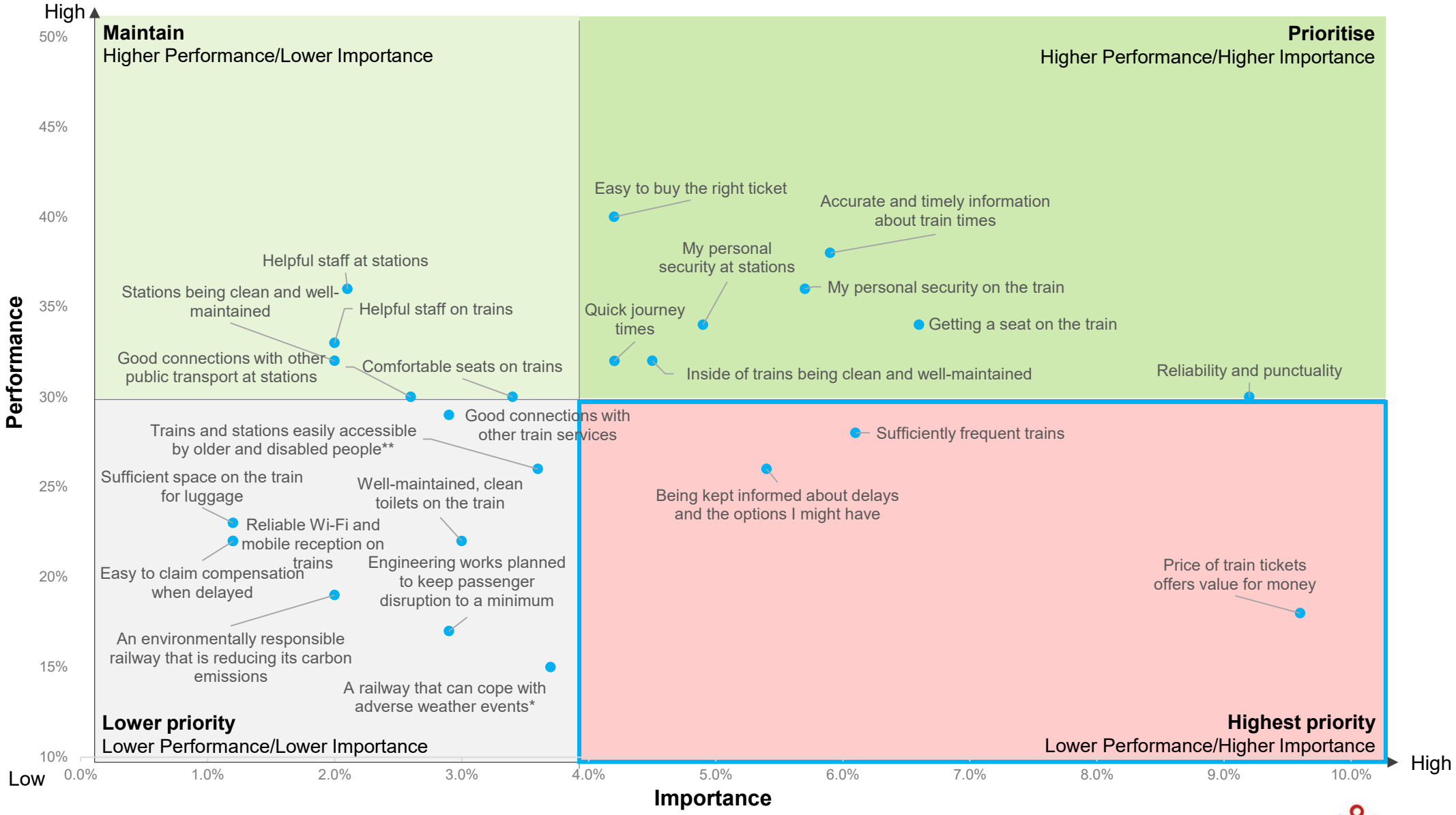
© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – LEISURE PASSENGERS

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance

All leisure passengers **Performance = "Excellent" and "Very good" scores (1 or 2 out of 7)**

Don't know responses excluded from performance ratings



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: Leisure passengers (n=5,576)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

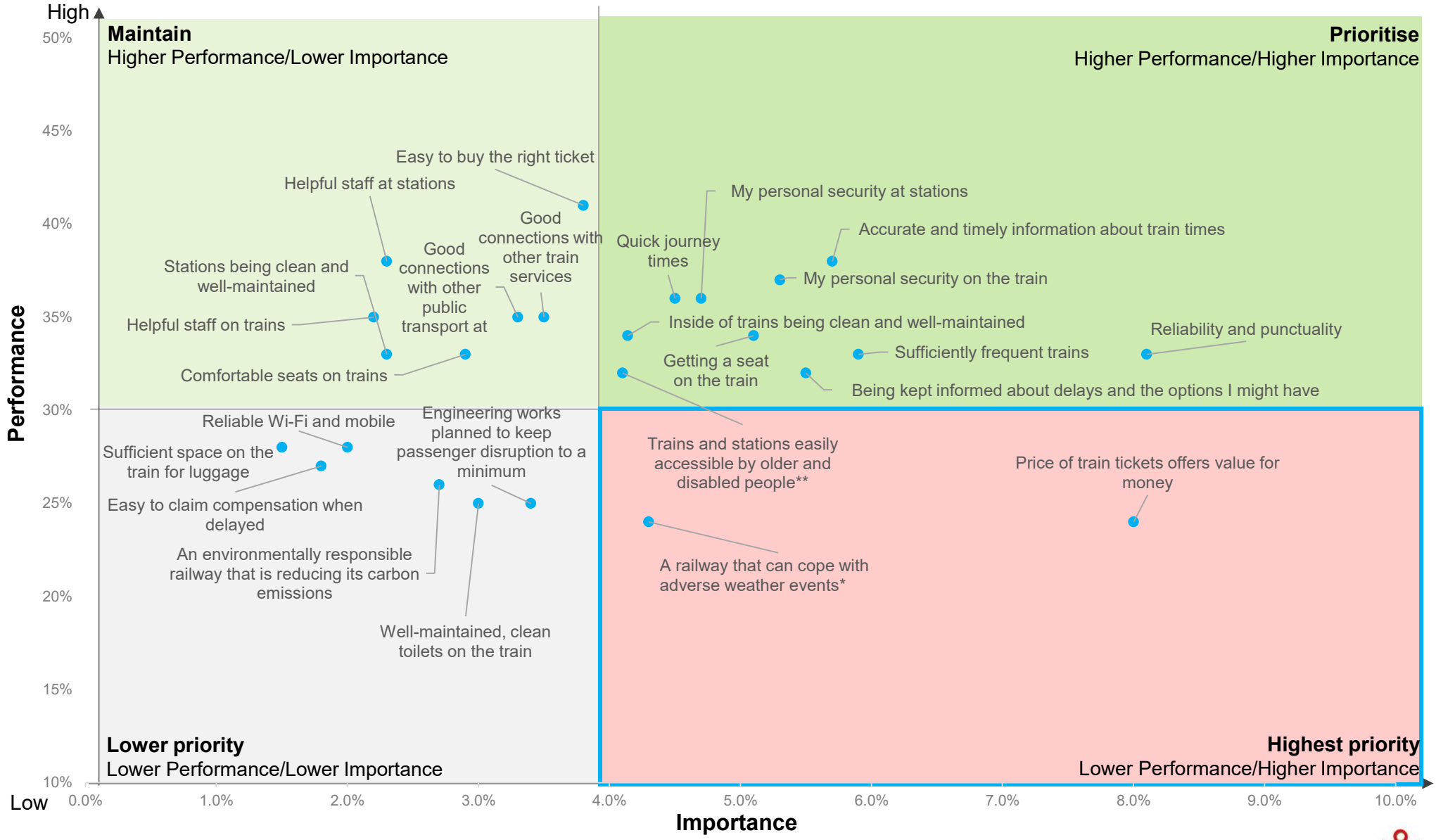
© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – PERSONAL BUSINESS

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance

All personal business passengers **Performance = "Excellent" and "Very good" scores (1 or 2 out of 7)**

Don't know responses excluded from performance ratings



© Quadrangle 2022

December 2022

MXD1 Please tell us which of the items are most important to you when travelling by train
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: Personal Business passengers (n=2,337)

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

- ENJOYMENT OF RAIL
- PERFORMANCE RATING BY TIME SINCE PREVIOUS JOURNEY
- TICKET PURCHASE METHOD
- TICKET TYPE
- CLASS OF TRAVEL
- JOURNEY LENGTH
- GROUP TRAVEL
- TRAVELLING WITH PERSONAL TRANSPORTATION, LUGGAGE AND HELPERS
- ALTERNATIVE TRANSPORTATION METHODS TO RAIL

© Quadrangle 2022

SUMMARY – OTHER INFLUENCES ON WHAT MATTERS TO PASSENGERS

quadrangle

ENJOYMENT AND PERFORMANCE OF RAIL

Enjoyment of using the railway has dipped since the pandemic. Now around half say that they enjoy travelling by train compared with more than three in five prior to the pandemic

It is also evident that the rating of most aspects of the Railway's performance decreases as the time from the previous journey increases

PURCHASE METHOD

The way in which **passengers purchase their tickets** (e.g. via websites, apps and in-person) does not have a huge influence over what matters to them

Although those purchasing their ticket by phone are less likely to rate value for money and reliability as highly important

TICKET TYPE

The type of ticket purchased is reflected in passengers' needs. **Off-peak and Advance** ticket passengers place more importance on value for money and reliability

In contrast, what matters to **season ticket holders** is more likely to include factors such as the timing of engineering works, the ability for the railway to cope in adverse weather and good connections with other services

CLASS OF TRAVEL

First Class passengers are looking beyond value for money and reliability, to seating and the cleanliness of trains and toilets

In some respects, however, the journey purpose is more important than the class of travel, for example, quick journey times for Business travellers

JOURNEY LENGTH

In addition to the value for money of the ticket and reliability of the service – both of which are very important, what matters to **passengers on longer journeys** is more likely than average to concern comfort and the train environment

For example, getting a seat, comfortable seating, well-maintained trains and clean train toilets are all more important for those on long journeys

GROUP TRAVEL

Those travelling in **family** groups are more likely than average to think personal security is important

Whereas for **couples**, the availability and comfort of seating is more important

The accessibility of the railway is more important than average to those travelling in **groups** – whether as a family or otherwise

TRAVELLING WITH PERSONAL TRANSPORTATION, LUGGAGE AND HELPERS

Accessibility of trains and stations is particularly important for those with buggies or push chairs, helpers or wheelchairs – they place lower importance on quick journey times

Personal security is also more of a concern than average for those with buggies and push chairs

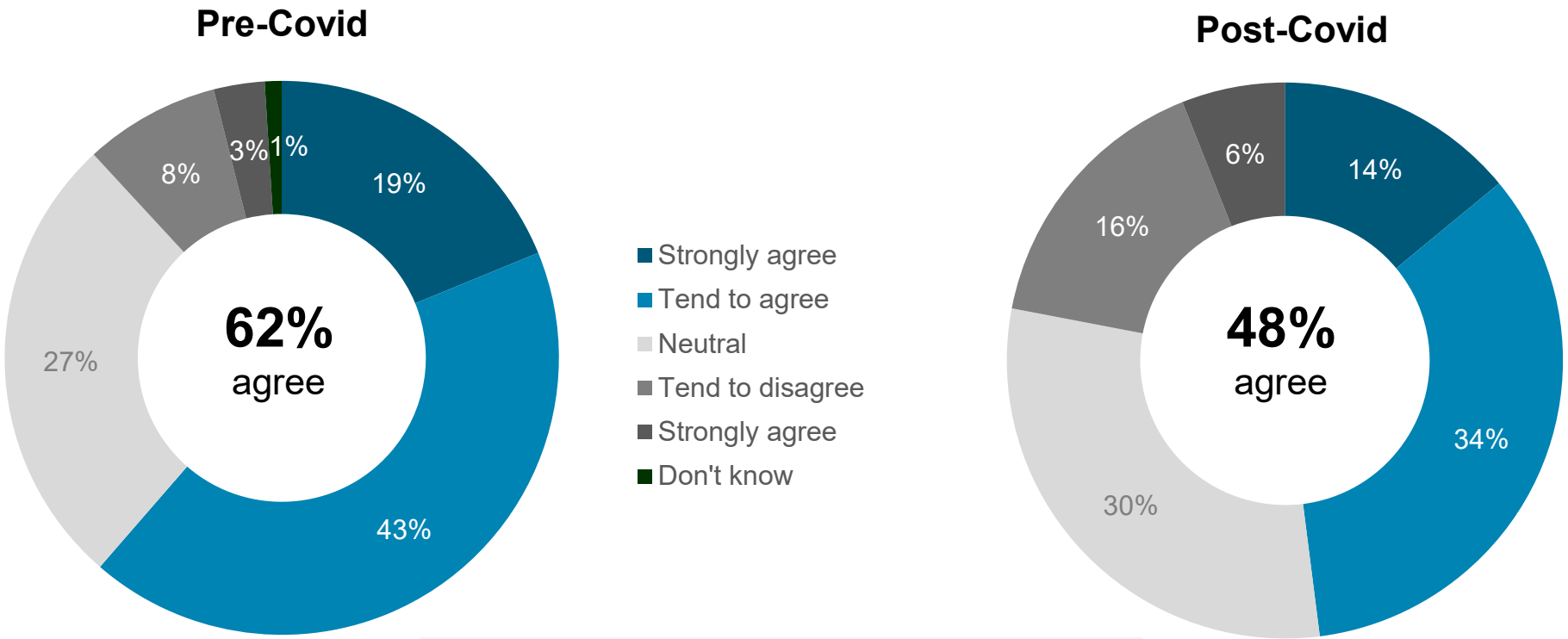
ALTERNATIVES TO RAIL

Those passengers with **no alternative to the train for getting to their destination** have expectations that broadly reflect the average – with slightly higher importance placed on value for money, reliability and getting a seat

ENJOYMENT IN USING THE TRAIN HAS DIPPED SINCE THE PANDEMIC

quadrangle

AGREEMENT WITH "I ENJOY TRAVELLING BY TRAIN AND LIKE TO USE THE RAILWAY AS MUCH AS POSSIBLE"



Those passengers who enjoyed rail the most pre-pandemic tend to still really enjoy it, e.g. frequent train passengers, First Class passengers, those with a bike on the train

QA3.1. Firstly, prior to the Coronavirus pandemic at the start of 2020, to what extent would you have agreed or disagreed with the following statement. I enjoy travelling by train, and like to use the railway as much as possible: We are interested in your overall attitude towards using trains prior to the Coronavirus pandemic and today - regardless of the number of times that you actually travel.

QA3.2. And, secondly, how much would you agree with the same statement today? I enjoy travelling by train, and like to use the railway as much as possible: We are interested in your overall attitude towards using trains prior to the Coronavirus pandemic and today - regardless of the number of times that you actually travel.

Base: All passengers, including lapsed passengers (n=15,226)

© Quadrangle 2022

PERCEIVED PERFORMANCE OF THE RAILWAY DECREASES AS THE TIME FROM A PREVIOUS JOURNEY INCREASES

quadrangle

IN MOST CASES THERE IS AROUND A 10% POINT DECLINE IN EXCELLENT AND VERY GOOD SCORES BETWEEN THOSE TRAVELLING IN THE LAST WEEK VERSUS 7-12 MONTHS AGO

Ranked High-Low importance for all current passengers

Passengers rating the Railway as **"Excellent" or "Very good"** (on 7 point scale)	All	In last week	In last month	2-3 months	4-6 months	7-12 months
Price of train tickets offers value for money	21%	26%	21%	19%	18%	17%
Reliability and punctuality	31%	35%	32%	29%	30%	27%
Sufficiently frequent trains	31%	35%	32%	29%	26%	25%
Getting a seat on the train	34%	37%	34%	31%	31%	31%
Accurate and timely information about train times	37%	41%	38%	36%	34%	32%
My personal security on the train	36%	40%	38%	36%	33%	29%
Being kept informed about delays and the options I might have	29%	34%	30%	28%	27%	22%
My personal security at stations	35%	39%	37%	33%	31%	31%
Quick journey times	34%	37%	35%	33%	28%	29%
Inside of trains being clean and well-maintained	33%	36%	35%	31%	29%	28%
A railway that can cope with adverse weather events*	19%	25%	21%	18%	17%	16%
Easy to buy the right ticket	40%	44%	43%	39%	37%	36%
Trains and stations easily accessible by older and disabled people**	27%	34%	29%	27%	25%	25%
Comfortable seats on trains	31%	34%	33%	30%	28%	27%
Good connections with other train services	30%	36%	34%	30%	28%	24%
Engineering works planned to keep passenger disruption to a minimum	20%	26%	22%	20%	19%	18%
Well-maintained, clean toilets on the train	22%	29%	25%	23%	22%	22%
Good connections with other public transport at stations	31%	38%	33%	31%	29%	26%
An environmentally responsible railway that is reducing its carbon emissions	19%	29%	24%	21%	21%	19%
Helpful staff at stations	35%	39%	37%	35%	35%	32%
Stations being clean and well-maintained	33%	37%	33%	30%	32%	29%
Helpful staff on trains	33%	34%	36%	34%	32%	31%
Reliable Wi-Fi and mobile reception on trains	22%	28%	23%	22%	24%	22%
Easy to claim compensation when delayed	18%	29%	26%	24%	21%	21%
Sufficient space on the train for luggage	25%	30%	27%	23%	22%	23%
Base	*12,565*	*3,803*	*3,783*	*2,566*	*1,213*	*1,167*

Don't know responses excluded

QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
QS6. When did you last travel by train?

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

THE TYPE OF TICKET USED IS REFLECTED IN PASSENGER NEEDS – OFF-PEAK AND ADVANCE TICKET PURCHASERS ARE CONCERNED ABOUT VALUE FOR MONEY AND SEATING. FLEXI AND ANNUAL SEASON TICKET HOLDERS HAVE A BROADER RANGE OF NEEDS

quadrangle

Ranked High-Low importance for all current passengers

Type of ticket generally used for most frequent journey	All	Anytime Single/ Return	Off-Peak/ Super Off-Peak	Advance	Pay As You Go (PAYG)	Day Travelcard	Weekly/ monthly season ticket	Flexi season ticket	Annual season ticket	Free travel pass
Price of train tickets offers value for money	215	210	244	237	185	207	186	168	170	145
Reliability and punctuality	213	207	231	216	197	200	192	161	190	236
Sufficiently frequent trains	148	144	157	136	149	142	146	124	143	186
Accurate and timely information about train times	143	145	146	135	143	140	138	122	142	151
Getting a seat on the train	143	132	167	178	106	127	111	96	112	144
My personal security on the train	136	142	134	123	143	137	123	111	120	154
Being kept informed about delays and the options I might have	135	138	134	132	138	134	136	133	139	136
My personal security at stations	118	125	113	103	130	121	110	100	108	135
Quick journey times	112	110	111	106	126	113	115	110	121	128
Inside of trains being clean and well-maintained	107	106	110	108	99	108	98	98	96	113
A railway that can cope with adverse weather events*	104	103	98	93	114	104	119	121	125	117
Easy to buy the right ticket	98	100	105	109	80	100	91	96	78	55
Trains and stations easily accessible by older and disabled people**	94	100	85	81	101	100	105	110	99	103
Good connections with other train services	81	82	74	76	97	81	93	100	95	89
Engineering works planned to keep passenger disruption to a minimum	80	79	77	74	91	85	99	97	97	80
Comfortable seats on trains	80	76	86	97	65	74	74	68	73	79
Good connections with other public transport at stations	76	77	66	67	97	75	90	98	94	88
Well-maintained, clean toilets on the train	75	76	72	83	65	79	72	83	77	70
An environmentally responsible railway that is reducing its carbon emissions	60	61	51	53	72	62	67	102	69	63
Helpful staff at stations	56	58	50	52	55	60	58	65	62	54
Stations being clean and well-maintained	54	56	48	48	60	60	62	67	63	55
Helpful staff on trains	52	54	46	53	50	56	55	61	58	48
Reliable Wi-Fi and mobile reception on trains	44	46	34	48	53	53	60	72	60	25
Easy to claim compensation when delayed	40	39	33	45	47	45	56	72	60	21
Sufficient space on the train for luggage	36	36	30	46	36	36	44	65	48	24
Base	*12,565*	*4,478*	*3,849*	*1,053*	*1,019*	*738*	*378*	*127*	*215*	*356*

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

MXD1 Please tell us which of the items are most important to you when travelling by train.
QS10. And what type of ticket do you generally use for your most frequent trip?

THERE ARE FEW MAJOR DIFFERENCES IN THE NEEDS OF PASSENGERS DEPENDING ON HOW THEY PURCHASE THEIR TICKETS. HOWEVER, THOSE USING THE PHONE ARE LESS LIKELY TO PRIORITISE VALUE FOR MONEY AND RELIABILITY, WHILST THOSE BOOKING ONLINE PLACE HIGH IMPORTANCE ON GETTING A SEAT

quadrangle

Disabled passengers are slightly more likely to use an app to purchase their tickets and less likely to book in person

Ranked High-Low importance for all current passengers

Most common way of purchasing a ticket	All	Website	App	Phone	In advance at station	At the station on the day	Onboard the train	Other
Price of train tickets offers value for money	215	222	215	159	208	224	199	166
Reliability and punctuality	213	213	204	152	202	230	206	209
Sufficiently frequent trains	148	143	142	113	141	166	152	152
Accurate and timely information about train times	143	139	142	126	139	152	139	141
Getting a seat on the train	143	157	131	102	143	139	136	143
My personal security on the train	136	132	133	131	128	147	133	136
Being kept informed about delays and the options I might have	135	133	140	131	130	138	135	133
My personal security at stations	118	113	117	118	110	128	119	119
Quick journey times	112	112	110	101	109	116	109	121
Inside of trains being clean and well-maintained	107	107	102	99	111	108	107	111
A railway that can cope with adverse weather events*	104	102	106	113	98	104	100	111
Easy to buy the right ticket	98	101	99	98	105	95	95	79
Trains and stations easily accessible by older and disabled people**	94	90	92	124	101	96	108	98
Good connections with other train services	81	79	86	94	82	79	80	86
Engineering works planned to keep passenger disruption to a minimum	80	79	83	89	75	80	83	81
Comfortable seats on trains	80	87	75	72	86	72	79	87
Good connections with other public transport at stations	76	73	80	94	80	73	72	81
Well-maintained, clean toilets on the train	75	78	74	84	83	67	79	78
An environmentally responsible railway that is reducing its carbon emissions	60	58	65	84	63	54	64	62
Helpful staff at stations	56	53	56	77	66	53	60	62
Stations being clean and well-maintained	54	53	55	69	59	51	60	61
Helpful staff on trains	52	50	52	75	63	47	57	57
Reliable Wi-Fi and mobile reception on trains	44	47	53	70	42	31	48	47
Easy to claim compensation when delayed	40	41	49	64	38	29	43	41
Sufficient space on the train for luggage	36	39	41	60	38	23	38	40
Base	*12,565*	*4,712*	*2,590*	*446*	*732*	*3,344*	*246*	*495*

MXD1 Please tell us which of the items are most important to you when travelling by train.
QD2. Which would you say is the most common way you would purchase a ticket for rail travel?

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

FIRST CLASS TRAVELLERS TEND TO HAVE A BROADER SET OF NEEDS OUTSIDE OF VALUE FOR MONEY AND RELIABILITY AND PUNCTUALITY

quadrangle

GETTING A SEAT, AND CLEAN AND WELL-MAINTAINED TRAINS ARE PARTICULARLY IMPORTANT TO FIRST CLASS LEISURE PASSENGERS

The First class passengers are more likely to be older, more male and AB social grade

Ranked High-Low importance for all current passengers

Most common class of travel for most frequent journey	All	Commuters		Business		Leisure		Personal Business	
		Standard class	First class	Standard class	First class	Standard class	First class	Standard class	First class
Price of train tickets offers value for money	215	210	162	195	155	243	216	208	187
Reliability and punctuality	213	210	171	200	183	233	224	210	189
Sufficiently frequent trains	148	153	127	148	127	155	137	153	123
Accurate and timely information about train times	143	145	112	140	127	148	122	148	123
Getting a seat on the train	143	128	126	128	132	165	199	130	141
My personal security on the train	136	137	123	123	116	145	125	135	111
Being kept informed about delays and the options I might have	135	140	103	135	127	138	113	138	117
My personal security at stations	118	123	109	108	105	123	104	118	98
Quick journey times	112	117	103	128	123	106	98	115	105
Inside of trains being clean and well-maintained	107	102	112	98	106	112	134	102	110
A railway that can cope with adverse weather events*	104	113	116	115	115	93	95	108	104
Easy to buy the right ticket	98	93	89	95	80	104	98	93	101
Trains and stations easily accessible by older and disabled people**	94	95	116	93	88	91	75	100	111
Good connections with other train services	81	85	89	93	91	72	68	89	85
Engineering works planned to keep passenger disruption to a minimum	80	86	92	89	93	73	68	83	87
Comfortable seats on trains	80	70	90	78	101	85	127	72	102
Good connections with other public transport at stations	76	81	84	90	85	65	57	83	77
Well-maintained, clean toilets on the train	75	70	97	75	86	73	100	73	88
An environmentally responsible railway that is reducing its carbon emissions	60	63	75	65	75	50	41	63	68
Helpful staff at stations	56	55	68	53	65	53	58	55	66
Stations being clean and well-maintained	54	55	67	55	67	48	58	55	62
Helpful staff on trains	52	53	68	50	64	49	61	50	65
Reliable Wi-Fi and mobile reception on trains	44	45	79	63	79	30	41	45	67
Easy to claim compensation when delayed	40	45	55	53	57	28	35	40	59
Sufficient space on the train for luggage	36	33	67	43	54	28	46	35	54
Base	*12,565*	*2,098*	*60*	*1,793*	*191*	*5,216*	*211*	*1,994*	*108*

Note: small base for First class Commuters

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

MXD1 Please tell us which of the items are most important to you when travelling by train.
QS11. And what class of ticket do you generally use for your trips?

WHAT MATTERS BY JOURNEY LENGTH AND ABILITY TO WORK FROM HOME

quadrangle

THE IMPORTANCE OF VALUE FOR MONEY AND RELIABILITY INCREASES WITH THE LENGTH OF THE JOURNEY, AS DOES GETTING A SEAT ON A TRAIN. SIMILARLY, THOSE COMMUTERS WHO HAVE NO OPTION BUT TO GO INTO WORK ARE MORE FOCUSSED ON RELIABILITY AND VALUE FOR MONEY THAN THOSE WHO HAVE A CHOICE

Ranked High-Low importance for all current passengers

		Journey length					Commuters with the option to work form home if necessary	
	All	Up to 20 mins	20-29 mins	30-59 mins	1 hr - 1 hr 59 mins	2+ hrs	Yes	No
Price of train tickets offers value for money	215	188	202	217	236	243	178	218
Reliability and punctuality	213	194	205	216	224	225	172	217
Sufficiently frequent trains	148	147	150	152	149	136	130	155
Accurate and timely information about train times	143	143	144	145	142	135	127	154
Getting a seat on the train	143	116	126	138	165	194	125	146
My personal security on the train	136	135	137	141	135	123	123	141
Being kept informed about delays and the options I might have	135	140	134	136	134	131	110	126
My personal security at stations	118	120	122	123	114	102	119	118
Quick journey times	112	113	117	114	109	101	118	116
Inside of trains being clean and well-maintained	107	104	105	106	109	113	112	117
A railway that can cope with adverse weather events*	104	110	104	105	99	97	106	101
Easy to buy the right ticket	98	95	98	96	103	98	104	87
Trains and stations easily accessible by older and disabled people**	94	104	98	94	89	85	88	91
Good connections with other train services	81	86	84	82	77	76	90	90
Engineering works planned to keep passenger disruption to a minimum	80	85	81	82	78	70	92	87
Comfortable seats on trains	80	73	73	76	86	106	86	85
Good connections with other public transport at stations	76	83	80	77	70	63	84	67
Well-maintained, clean toilets on the train	75	75	73	73	74	86	80	65
An environmentally responsible railway that is reducing its carbon emissions	60	71	66	58	52	46	75	59
Helpful staff at stations	56	62	59	54	52	50	66	57
Stations being clean and well-maintained	54	61	58	53	49	47	70	52
Helpful staff on trains	52	58	55	50	48	49	63	51
Reliable Wi-Fi and mobile reception on trains	44	50	48	42	40	42	68	38
Easy to claim compensation when delayed	40	47	44	37	35	39	66	34
Sufficient space on the train for luggage	36	40	37	33	30	45	49	29
Base	*12,565*	*2,094*	*2,474*	*4,237*	*2,546*	*1,214*	*186*	*482*

MXD1 Please tell us which of the items are most important to you when travelling by train.
QC5. On average, how long does your most frequent trip take by train?
QD7. If you had to or wanted to, would it be feasible for you to work from home, or is that not possible with your current job?

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

PERSONAL SECURITY AND ACCESSIBILITY ARE MORE IMPORTANT TO FAMILY GROUPS, WHILE SUFFICIENT AND COMFORTABLE SEATING MATTERS MORE FOR COUPLES

quadrangle

Ranked High-Low importance for all current passengers

How passengers tend to travel	All	Alone	As a couple	As a family	In a group (not family)
Price of train tickets offers value for money	215	206	215	208	190
Reliability and punctuality	213	207	214	200	186
Sufficiently frequent trains	148	149	150	136	131
Accurate and timely information about train times	143	142	141	140	138
Getting a seat on the train	143	134	151	127	121
My personal security on the train	136	131	134	146	134
Being kept informed about delays and the options I might have	135	135	133	135	137
My personal security at stations	118	114	116	129	120
Quick journey times	112	118	112	106	106
Inside of trains being clean and well-maintained	107	103	108	107	104
A railway that can cope with adverse weather events*	104	109	101	105	111
Easy to buy the right ticket	98	95	98	96	99
Trains and stations easily accessible by older and disabled people*	94	94	89	111	108
Good connections with other train services	81	87	81	82	85
Engineering works planned to keep passenger disruption to a minimum	80	85	81	81	85
Comfortable seats on trains	80	77	85	74	74
Good connections with other public transport at stations	76	81	75	77	81
Well-maintained, clean toilets on the train	75	74	75	78	79
An environmentally responsible railway that is reducing its carbon emissions	60	64	61	65	73
Helpful staff at stations	56	56	55	58	65
Stations being clean and well-maintained	54	55	54	58	62
Helpful staff on trains	52	52	52	54	60
Reliable Wi-Fi and mobile reception on trains	44	50	44	49	55
Easy to claim compensation when delayed	40	45	40	41	50
Sufficient space on the train for luggage	36	38	37	38	45
Base	*12,565*	*9,177*	*4,547*	*3,788*	*2,994*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.
QD4. For the following types of train journey, do you normally travel…?

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

EXPECTATIONS OF THOSE TRAVELLING WITH PERSONAL TRANSPORTATION, LUGGAGE, DOGS AND HELPERS

ACCESSIBILITY AND PERSONAL SECURITY ARE PARTICULARLY IMPORTANT FOR THOSE WITH BUGGIES OR PUSH CHAIRS, AND ACCESSIBILITY FOR THOSE WITH HELPERS OR WHEELCHAIRS

Ranked High-Low importance for all current passengers

		Travelling with						
	All	Mobility scooter/ wheel chair	Helper	Heavy/ bulky luggage	Buggy/ pram	Bicycle	Dog	E-scooter
Price of train tickets offers value for money	215	154	166	218	208	173	181	140
Reliability and punctuality	213	145	154	213	198	170	180	139
Sufficiently frequent trains	148	103	106	145	133	130	132	108
Accurate and timely information about train times	143	109	108	143	141	125	131	113
Getting a seat on the train	143	115	144	146	112	107	117	95
My personal security on the train	136	123	131	133	154	119	130	127
Being kept informed about delays and the options I might have	135	117	115	139	144	124	131	123
My personal security at stations	118	112	118	114	137	107	116	119
Quick journey times	112	82	80	107	97	109	107	105
Inside of trains being clean and well-maintained	107	101	104	102	102	102	103	107
A railway that can cope with adverse weather events*	104	105	97	104	107	111	110	126
Easy to buy the right ticket	98	92	99	92	89	92	101	96
Trains and stations easily accessible by older and disabled people**	94	160	151	97	151	104	102	126
Good connections with other train services	81	85	85	86	81	97	88	91
Engineering works planned to keep passenger disruption to a minimum	80	86	79	81	79	94	87	87
Comfortable seats on trains	80	82	92	79	60	76	78	80
Good connections with other public transport at stations	76	85	84	79	77	93	86	89
Well-maintained, clean toilets on the train	75	95	94	75	75	87	84	89
An environmentally responsible railway that is reducing its carbon emissions	60	87	79	58	64	88	76	94
Helpful staff at stations	56	97	84	53	62	68	67	74
Stations being clean and well-maintained	54	72	68	50	55	69	64	80
Helpful staff on trains	52	94	81	50	56	65	63	71
Reliable Wi-Fi and mobile reception on trains	44	64	64	46	41	66	63	87
Easy to claim compensation when delayed	40	63	56	41	36	60	54	64
Sufficient space on the train for luggage	36	69	59	48	41	61	50	69
Base	*12,565*	*329*	*309*	*3,497*	*1,255*	*699*	*721*	*209*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.
QS13. And do you travel by train with any of the following at least some of the time?

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

FOR THOSE WITH ALTERNATIVE WAYS OF GETTING TO THEIR DESTINATION, VALUE FOR MONEY AND RELIABILITY ARE OFTEN SLIGHTLY LESS IMPORTANT, WITH THINGS LIKE SEATING, QUICK JOURNEYS, GOOD CONNECTIONS AND ACCESSIBILITY BECOMING MORE IMPORTANT

quadrangle

Ranked High-Low importance for all current passengers

Whether have an alternative mode of transport if unable to travel by train for most frequent journey	All	No alternative	Yes - on foot/walk	Yes - a lift/car share	Yes - a car (as driver)	Yes - bicycle	Yes - motorbike	Yes - bus/ coach	Yes - tram/ Metro	Yes – Under-ground	Yes – taxi	Yes - plane
Price of train tickets offers value for money	215	225	180	198	229	177	161	215	174	185	193	230
Reliability and punctuality	213	219	172	196	226	172	156	220	178	217	204	208
Sufficiently frequent trains	148	156	126	133	153	128	126	156	132	162	141	125
Accurate and timely information about train times	143	143	128	141	145	129	117	149	127	150	153	130
Getting a seat on the train	143	153	115	132	155	103	102	137	115	119	117	176
My personal security on the train	136	132	130	141	140	123	117	137	125	139	150	104
Being kept informed about delays and the options I might have	135	136	128	138	133	129	119	142	129	139	150	126
My personal security at stations	118	113	117	125	120	111	108	119	112	125	133	86
Quick journey times	112	118	113	100	114	111	116	108	111	129	105	118
Inside of trains being clean and well-maintained	107	100	102	110	111	104	98	104	101	104	108	117
A railway that can cope with adverse weather events*	104	107	106	111	98	105	102	107	121	113	111	93
Easy to buy the right ticket	98	98	104	90	101	97	99	93	93	73	88	103
Trains and stations easily accessible by older and disabled people**	94	88	105	116	86	106	106	101	114	92	110	86
Good connections with other train services	81	79	90	80	76	99	101	84	93	97	79	75
Engineering works planned to keep passenger disruption to a minimum	80	83	85	83	77	86	97	80	92	89	85	81
Comfortable seats on trains	80	82	77	75	84	74	82	74	76	71	67	109
Good connections with other public transport at stations	76	73	87	76	69	98	99	79	89	99	74	69
Well-maintained, clean toilets on the train	75	70	83	79	74	86	88	71	82	66	76	94
An environmentally responsible railway that is reducing its carbon emissions	60	55	75	70	53	85	80	62	80	61	60	51
Helpful staff at stations	56	52	68	62	52	67	75	55	61	53	62	53
Stations being clean and well-maintained	54	48	67	60	52	69	69	51	62	56	58	56
Helpful staff on trains	52	48	66	57	48	65	76	50	58	46	57	53
Reliable Wi-Fi and mobile reception on trains	44	43	64	45	39	64	69	38	65	44	44	54
Easy to claim compensation when delayed	40	43	59	43	33	57	70	35	53	38	39	43
Sufficient space on the train for luggage	36	34	52	40	31	55	68	32	58	33	38	62
Base	*12,565*	*1,828*	*1,502*	*1,540*	*5,550*	*524*	*189*	*3,149*	*332*	*560*	*1,047*	*112*

MXD1 Please tell us which of the items are most important to you when travelling by train.
QD11. If you are unable to travel by train when you take your most frequent trip, do you have an alternative means of making your journey?

Expectations exact wording
* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

GWR

SUMMARY OF WHAT MATTERS TO PASSENGERS BY NETWORK RAIL REGION

A PRETTY FLAT PICTURE ACROSS THE REGIONS, ALTHOUGH SEATING IS LESS IMPORTANT IN THE SOUTHERN REGION WHERE JOURNEY TIME IS OF SLIGHTLY HIGHER IMPORTANCE

quadrangle

Ranked High-Low importance for all current passengers

	Network Rail Region					
	All	Eastern	North West & Central	Scotland's Railway	Southern	Wales & Western
Price of train tickets offers value for money	215	223	210	222	208	218
Reliability and punctuality	213	214	211	214	214	213
Sufficiently frequent trains	148	146	148	153	154	146
Accurate and timely information about trains	143	144	144	140	145	141
Getting a seat on the train	143	144	144	153	131	154
My personal security on the train	136	137	142	130	136	130
Being kept informed about delays and the options I might have	135	137	137	127	137	133
My personal security at stations	118	119	124	111	119	112
Quick journey times	112	111	112	109	120	105
Inside of trains being clean and well-maintained	107	107	105	114	105	109
A railway that can cope with adverse weather events*	104	103	101	106	108	99
Easy to buy the right ticket	98	100	97	96	95	101
Trains and stations easily accessible by older and disabled people**	94	94	97	95	92	94
Good connections with other train services	81	81	80	75	86	79
Engineering works planned to keep passenger disruption to a minimum	80	81	79	73	86	77
Comfortable seats on trains	80	80	79	87	74	85
Good connections with other public transport at stations	76	75	74	70	81	73
Well-maintained, clean toilets on the train	75	74	72	83	72	79
An environmentally responsible railway that is reducing its carbon emissions	60	56	59	61	60	64
Helpful staff at stations	56	54	56	57	55	57
Stations being clean and well-maintained	54	53	53	56	55	55
Helpful staff on trains	52	50	52	55	50	54
Reliable Wi-Fi and mobile reception on trains	44	41	46	46	43	46
Easy to claim compensation when delayed	40	41	40	34	40	39
Sufficient space on the train for luggage	36	35	37	35	33	38
Base	*12,565*	*3,969*	*2,996*	*1,033*	*2,670*	*1,762*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

WHAT MATTERS TO NETWORK RAIL EASTERN REGION PASSENGERS BROADLY REFLECTS THE NATIONAL AVERAGE, WITH EAST ANGLIA PASSENGERS PLACING SLIGHTLY GREATER IMPORTANCE ON GOOD CONNECTIONS AND SCHEDULING OF ENGINEERING WORKS FOR MINIMUM PASSENGER DISRUPTION

quadrangle

Ranked High-Low importance for all current passengers

	All	Eastern	Anglia	East Coast	East Midlands	North & East
Price of train tickets offers value for money	215	223	217	225	226	226
Reliability and punctuality	213	214	216	212	210	219
Sufficiently frequent trains	148	146	151	140	142	151
Accurate and timely information about train times	143	144	145	139	145	146
Getting a seat on the train	143	144	131	152	146	156
My personal security on the train	136	137	141	132	140	135
Being kept informed about delays and the options I might have	135	137	141	133	134	138
My personal security at stations	118	119	124	113	122	116
Quick journey times	112	111	114	110	110	109
Inside of trains being clean and well-maintained	107	107	106	106	108	106
A railway that can cope with adverse weather events*	104	103	107	104	100	97
Easy to buy the right ticket	98	100	92	106	105	105
Trains and stations easily accessible by older and disabled people**	94	94	96	94	91	94
Good connections with other train services	81	81	88	79	78	76
Engineering works planned to keep passenger disruption to a minimum	80	81	90	77	74	76
Comfortable seats on trains	80	80	72	86	82	84
Good connections with other public transport at stations	76	75	83	73	72	68
Well-maintained, clean toilets on the train	75	74	70	76	76	75
An environmentally responsible railway that is reducing its carbon emissions	60	56	58	55	61	51
Helpful staff at stations	56	54	52	56	53	55
Stations being clean and well-maintained	54	53	53	52	54	51
Helpful staff on trains	52	50	47	53	50	52
Reliable Wi-Fi and mobile reception on trains	44	41	38	43	44	39
Easy to claim compensation when delayed	40	41	39	43	42	42
Sufficient space on the train for luggage	36	35	29	41	37	36
Base	*12,565*	*3,969*	*1,215*	*1,213*	*767*	*781*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

EXPECTATIONS OF PASSENGERS ARE CONSISTENT ACROSS ROUTES WITHIN THE NORTH WEST AND CENTRAL REGION, AND BROADLY REFLECT THE NATIONAL PICTURE

quadrangle

Ranked High-Low importance for all current passengers

	All	North West & Central	Central	North West	West Coast South
Price of train tickets offers value for money	215	210	207	213	206
Reliability and punctuality	213	211	208	214	209
Sufficiently frequent trains	148	148	145	151	146
Accurate and timely information about train times	143	144	145	144	141
Getting a seat on the train	143	144	135	147	152
My personal security on the train	136	142	144	141	141
Being kept informed about delays and the options I might have	135	137	140	137	131
My personal security at stations	118	124	126	123	122
Quick journey times	112	112	109	111	119
Inside of trains being clean and well-maintained	107	105	104	104	105
A railway that can cope with adverse weather events*	104	101	108	100	95
Easy to buy the right ticket	98	97	98	96	96
Trains and stations easily accessible by older and disabled people**	94	97	101	95	96
Good connections with other train services	81	80	80	80	81
Engineering works planned to keep passenger disruption to a minimum	80	79	81	81	73
Comfortable seats on trains	80	79	77	79	82
Good connections with other public transport at stations	76	74	75	73	76
Well-maintained, clean toilets on the train	75	72	69	72	75
An environmentally responsible railway that is reducing its carbon emissions	60	59	62	56	61
Helpful staff at stations	56	56	57	57	56
Stations being clean and well-maintained	54	53	54	51	55
Helpful staff on trains	52	52	52	54	51
Reliable Wi-Fi and mobile reception on trains	44	46	46	45	49
Easy to claim compensation when delayed	40	40	39	40	43
Sufficient space on the train for luggage	36	37	36	38	38
Base	*12,565*	*2,996*	*960*	*1,488*	*536*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

ROUTES WITHIN THE NETWORK RAIL SOUTHERN REGION REFLECT SLIGHTLY DIFFERENT PASSENGER EXPECTATIONS

quadrangle

FOR EXAMPLE, VALUE FOR MONEY, RELIABILITY AND GETTING A SEAT ON A TRAIN ARE MORE IMPORTANT IN WESSEX THAN ON THE OTHER ROUTES

Ranked High-Low importance for All passengers

	All	Southern	Kent	Network Rail High Speed	Sussex	Wessex
Price of train tickets offers value for money	215	208	197	212	197	221
Reliability and punctuality	213	214	207	218	206	221
Sufficiently frequent trains	148	154	150	150	155	154
Accurate and timely information about train times	143	145	144	162	143	144
Getting a seat on the train	143	131	118	109	122	145
My personal security on the train	136	136	144	140	133	132
Being kept informed about delays and the options I might have	135	137	138	145	139	133
My personal security at stations	118	119	128	124	117	114
Quick journey times	112	120	117	123	124	119
Inside of trains being clean and well-maintained	107	105	104	111	102	108
A railway that can cope with adverse weather events*	104	108	110	94	114	103
Easy to buy the right ticket	98	95	97	105	90	97
Trains and stations easily accessible by older and disabled people**	94	92	94	79	97	89
Good connections with other train services	81	86	89	92	91	82
Engineering works planned to keep passenger disruption to a minimum	80	86	88	71	88	84
Comfortable seats on trains	80	74	68	73	70	80
Good connections with other public transport at stations	76	81	84	84	89	76
Well-maintained, clean toilets on the train	75	72	72	76	72	74
An environmentally responsible railway that is reducing its carbon emissions	60	60	63	57	68	56
Helpful staff at stations	56	55	58	57	54	53
Stations being clean and well-maintained	54	55	58	60	57	53
Helpful staff on trains	52	50	53	53	49	49
Reliable Wi-Fi and mobile reception on trains	44	43	42	40	45	44
Easy to claim compensation when delayed	40	40	42	34	44	38
Sufficient space on the train for luggage	36	33	34	30	35	33
Base	*12,565*	*2,670*	*901*	*93*	*821*	*1,054*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

WHAT MATTERS TO PASSENGERS ON ROUTES WITHIN THE WALES AND WESTERN REGION, AS WELL AS IN SCOTLAND, BROADLY REFLECT THAT OF PASSENGERS OVERALL

quadrangle

Ranked High-Low importance for all current passengers

	All	Wales & Western	Wales & Borders	Western	Scotland's Railway
Price of train tickets offers value for money	215	218	217	219	222
Reliability and punctuality	213	213	209	215	214
Sufficiently frequent trains	148	146	146	146	153
Accurate and timely information about train times	143	141	141	141	140
Getting a seat on the train	143	154	154	154	153
My personal security on the train	136	130	130	129	130
Being kept informed about delays and the options I might have	135	133	131	135	127
My personal security at stations	118	112	112	111	111
Quick journey times	112	105	100	109	109
Inside of trains being clean and well-maintained	107	109	114	106	114
A railway that can cope with adverse weather events*	104	99	93	102	106
Easy to buy the right ticket	98	101	102	101	96
Trains and stations easily accessible by older and disabled people**	94	94	91	95	95
Good connections with other train services	81	79	79	79	75
Engineering works planned to keep passenger disruption to a minimum	80	77	75	78	73
Comfortable seats on trains	80	85	88	84	87
Good connections with other public transport at stations	76	73	71	74	70
Well-maintained, clean toilets on the train	75	79	85	75	83
An environmentally responsible railway that is reducing its carbon emissions	60	64	63	65	61
Helpful staff at stations	56	57	60	56	57
Stations being clean and well-maintained	54	55	59	53	56
Helpful staff on trains	52	54	57	53	55
Reliable Wi-Fi and mobile reception on trains	44	46	46	46	46
Easy to claim compensation when delayed	40	39	39	39	34
Sufficient space on the train for luggage	36	38	40	36	35
Base	*12,565*	*1,762*	*640*	*1,122*	*1,033*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

quadrangle

- RAIL INDUSTRY SECTOR
- INDIVIDUAL TOCs
- TOC PERFORMANCE

THOSE TRAVELLING WITH AIRPORT OPERATORS HAVE A FAR BROADER RANGE OF EXPECTATIONS THAN PASSENGERS AS A WHOLE

quadrangle

SEATING IS PARTICULARLY IMPORTANT FOR PASSENGERS USING LONG DISTANCE OPERATORS

Ranked High-Low importance for all current passengers

Train Operators (TOC) used	All	TOC - London & South East	TOC - Long Distance	TOC - Regional	TOC - Airport	TOC - Open Access
Price of train tickets offers value for money	215	211	220	225	152	198
Reliability and punctuality	213	213	207	224	151	183
Sufficiently frequent trains	148	152	136	161	108	118
Accurate and timely information about tra7in times	143	144	138	147	119	131
Getting a seat on the train	143	135	159	150	114	136
My personal security on the train	136	137	130	137	130	128
Being kept informed about delays and the options I might have	135	137	132	135	126	142
My personal security at stations	118	120	111	117	121	113
Quick journey times	112	117	107	110	105	99
Inside of trains being clean and well-maintained	107	105	108	110	104	105
A railway that can cope with adverse weather events*	104	107	99	102	108	108
Easy to buy the right ticket	98	94	105	98	95	106
Trains and stations easily accessible by older and disabled people**	94	95	92	94	113	102
Good connections with other train services	81	84	77	77	93	85
Engineering works planned to keep passenger disruption to a minimum	80	85	75	75	91	86
Comfortable seats on trains	80	76	90	80	74	81
Good connections with other public transport at stations	76	79	71	71	94	80
Well-maintained, clean toilets on the train	75	72	81	74	93	84
An environmentally responsible railway that is reducing its carbon emissions	60	61	59	55	78	65
Helpful staff at stations	56	55	56	54	78	69
Stations being clean and well-maintained	54	54	54	52	72	64
Helpful staff on trains	52	50	54	51	75	64
Reliable Wi-Fi and mobile reception on trains	44	44	49	37	82	53
Easy to claim compensation when delayed	40	40	44	34	67	53
Sufficient space on the train for luggage	36	33	45	31	59	45
Base	*12,565*	*6,185*	*2,813*	*2,510*	*154*	*211*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

LONDON AND SOUTH EASTERN PASSENGERS TEND TO HAVE A BROAD RANGE OF NEEDS – ALTHOUGH GWR AND GREATER ANGLIA PASSENGERS HEAVILY PRIORITISE VALUE FOR MONEY AND RELIABILITY

quadrangle

Ranked High-Low importance for all current passengers

London and South East (1 of 2)

	All	C2C	Chiltern Railways	Elizabeth Line (TfL Rail)	Greater Anglia	Great Northern	Great Western Railway
Price of train tickets offers value for money	215	177	190	168	236	161	226
Reliability and punctuality	213	194	180	180	221	175	219
Sufficiently frequent trains	148	145	139	143	154	113	146
Accurate and timely information about train times	143	141	139	137	142	129	142
Getting a seat on the train	143	110	127	108	139	135	162
My personal security on the train	136	151	123	135	136	132	133
Being kept informed about delays and the options I might have	135	138	141	135	135	129	135
My personal security at stations	118	136	109	122	118	116	113
Quick journey times	112	114	110	123	115	104	107
Inside of trains being clean and well-maintained	107	105	105	101	108	110	109
A railway that can cope with adverse weather events*	104	103	103	119	105	108	98
Easy to buy the right ticket	98	95	101	80	96	98	100
Trains and stations easily accessible by older and disabled people**	94	103	100	105	93	86	93
Good connections with other train services	81	86	93	102	83	95	76
Engineering works planned to keep passenger disruption to a minimum	80	94	90	92	91	78	77
Comfortable seats on trains	80	69	77	73	75	92	87
Good connections with other public transport at stations	76	86	88	102	77	103	68
Well-maintained, clean toilets on the train	75	75	75	74	74	71	78
An environmentally responsible railway that is reducing its carbon emissions	60	67	72	78	55	69	58
Helpful staff at stations	56	59	64	59	52	63	57
Stations being clean and well-maintained	54	62	62	64	50	67	52
Helpful staff on trains	52	53	58	54	47	60	54
Reliable Wi-Fi and mobile reception on trains	44	55	60	54	35	90	40
Easy to claim compensation when delayed	40	41	49	49	38	63	37
Sufficient space on the train for luggage	36	42	45	45	25	55	34
Base	*12,565*	*259*	*255*	*310*	*620*	*48*	*1,116*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Note: Very low base size <50 for Great Northern

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

LONDON OVERGROUND PASSENGERS HAVE SLIGHTLY DIFFERENT EXPECTATIONS TO THE AVERAGE WITH CONNECTIONS AND ACCESSIBILITY MORE IMPORTANT AND GETTING A SEAT LESS SO

quadrangle

Ranked High-Low importance for all current passengers

London and South East (2 of 2)

	All	London Northwestern Railway	London Overground	Southeastern	Southern	South Western Railway	Thameslink	West Midlands Railway
Price of train tickets offers value for money	215	201	173	221	225	223	213	200
Reliability and punctuality	213	201	191	228	230	228	227	205
Sufficiently frequent trains	148	143	140	162	170	160	163	144
Accurate and timely information about train times	143	141	139	150	151	148	154	141
Getting a seat on the train	143	144	98	134	144	146	123	129
My personal security on the train	136	129	147	146	133	132	135	142
Being kept informed about delays and the options I might have	135	131	138	138	140	134	145	134
My personal security at stations	118	112	133	127	113	114	118	126
Quick journey times	112	113	118	123	129	121	126	112
Inside of trains being clean and well-maintained	107	95	102	106	100	104	102	105
A railway that can cope with adverse weather events*	104	114	114	105	113	104	117	107
Easy to buy the right ticket	98	103	88	96	93	91	88	99
Trains and stations easily accessible by older and disabled people*	94	100	112	89	85	90	89	101
Good connections with other train services	81	75	100	81	83	80	89	80
Engineering works planned to keep passenger disruption to a minimum	80	85	90	84	86	85	87	77
Comfortable seats on trains	80	82	61	69	79	76	69	77
Good connections with other public transport at stations	76	70	101	74	77	73	82	76
Well-maintained, clean toilets on the train	75	71	70	68	67	69	68	72
An environmentally responsible railway that is reducing its carbon emissions	60	71	73	56	53	57	52	69
Helpful staff at stations	56	56	58	52	47	52	47	58
Stations being clean and well-maintained	54	55	65	51	46	51	50	58
Helpful staff on trains	52	52	52	47	43	47	42	54
Reliable Wi-Fi and mobile reception on trains	44	67	47	38	33	45	41	51
Easy to claim compensation when delayed	40	51	48	32	34	39	43	42
Sufficient space on the train for luggage	36	39	41	23	26	31	29	39
Base	*12,565*	*146*	*481*	*724*	*464*	*790*	*385*	*575*

Southwestern Railway includes Island Line

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

CALEDONIAN SLEEPER PASSENGERS HAVE AMONG THE BROADEST RANGE OF NEEDS OF ALL PASSENGERS – THEY ARE PARTICULARLY ENVIRONMENTALLY CONSCIOUS AND DESIRE CLEAN AND WELL-MAINTAINED TOILETS

quadrangle

Ranked High-Low importance for all current passengers

		Long distance					
	All	Avanti West Coast	Caledonian Sleeper	CrossCountry	East Midlands Railway	London North Eastern Railway	TransPennine Express
Price of train tickets offers value for money	215	220	141	205	218	236	230
Reliability and punctuality	213	209	149	196	199	217	225
Sufficiently frequent trains	148	142	110	131	131	133	151
Accurate and timely information about train times	143	134	118	140	141	132	151
Getting a seat on the train	143	169	117	148	147	173	157
My personal security on the train	136	127	102	125	135	129	135
Being kept informed about delays and the options I might have	135	129	120	135	135	125	141
My personal security at stations	118	108	91	109	118	108	114
Quick journey times	112	114	104	104	103	107	108
Inside of trains being clean and well-maintained	107	106	108	105	111	110	105
A railway that can cope with adverse weather events*	104	98	109	90	98	101	105
Easy to buy the right ticket	98	99	92	107	110	112	98
Trains and stations easily accessible by older and disabled people*	94	84	90	104	95	89	91
Good connections with other train services	81	81	86	84	77	71	72
Engineering works planned to keep passenger disruption to a minimum	80	77	82	75	74	71	78
Comfortable seats on trains	80	94	93	86	86	99	82
Good connections with other public transport at stations	76	72	94	79	73	63	65
Well-maintained, clean toilets on the train	75	81	118	83	80	82	72
An environmentally responsible railway that is reducing its carbon emissions	60	55	110	59	66	54	52
Helpful staff at stations	56	53	77	61	58	54	55
Stations being clean and well-maintained	54	51	79	58	59	50	48
Helpful staff on trains	52	51	79	60	54	52	51
Reliable Wi-Fi and mobile reception on trains	44	56	85	56	45	45	39
Easy to claim compensation when delayed	40	45	71	48	45	41	38
Sufficient space on the train for luggage	36	44	76	51	43	44	37
Base	*12,565*	*691*	*60*	*359*	*723*	*606*	*374*

© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.

Note: Low base size <100 for Caledonia Sleeper

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

VALUE FOR MONEY AND RELIABILITY AND PUNCTUALITY ARE PARTICULARLY IMPORTANT TO REGIONAL TOC PASSENGERS

quadrangle

MERSEYRAIL PASSENGERS PLACE HIGHER THAN AVERAGE IMPORTANCE ON PERSONAL SECURITY

Ranked High-Low importance for all current passengers

		Regional			
	All	MerseyRail	Northern	ScotRail	Transport for Wales
Price of train tickets offers value for money	215	202	228	228	226
Reliability and punctuality	213	219	227	223	219
Sufficiently frequent trains	148	159	165	161	153
Accurate and timely information about train times	143	145	151	145	147
Getting a seat on the train	143	125	149	154	156
My personal security on the train	136	174	134	134	128
Being kept informed about delays and the options I might have	135	131	141	130	135
My personal security at stations	118	156	115	113	109
Quick journey times	112	107	113	110	101
Inside of trains being clean and well-maintained	107	105	104	114	117
A railway that can cope with adverse weather events*	104	106	98	107	94
Easy to buy the right ticket	98	94	102	96	98
Trains and stations easily accessible by older and disabled people**	94	112	89	95	89
Good connections with other train services	81	78	80	72	82
Engineering works planned to keep passenger disruption to a minimum	80	82	78	72	69
Comfortable seats on trains	80	66	77	83	87
Good connections with other public transport at stations	76	70	73	67	74
Well-maintained, clean toilets on the train	75	69	67	80	79
An environmentally responsible railway that is reducing its carbon emissions	60	53	51	57	62
Helpful staff at stations	56	60	52	54	54
Stations being clean and well-maintained	54	52	49	53	57
Helpful staff on trains	52	53	50	51	51
Reliable Wi-Fi and mobile reception on trains	44	30	36	40	39
Easy to claim compensation when delayed	40	26	38	29	39
Sufficient space on the train for luggage	36	26	33	30	37
Base	*12,565*	*259*	*1,104*	*811*	*336*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

A RANGE OF FACTORS STAND OUT AS MORE IMPORTANT TO OPEN ACCESS AND AIRPORT TOC PASSENGERS, INCLUDING BEING ABLE TO COPE WITH ADVERSE WEATHER, TRAIN AND STATION ACCESSIBILITY, AND WELL-MAINTAINED TOILETS

quadrangle

DESPITE THE SMALL SAMPLE SIZE, ACCESSIBILITY AND WELL-TIMED ENGINEERING WORKS APPEAR RELATIVELY IMPORTANT TO STANSTED EXPRESS PASSENGERS

Ranked High-Low importance for all current passengers

		Open Access		Airport		
	All	Grand Central	Hull Trains	Gatwick Express	Heathrow Express	Stansted Express
Price of train tickets offers value for money	215	184	211	149	138	171
Reliability and punctuality	213	167	200	140	153	173
Sufficiently frequent trains	148	111	122	103	113	115
Accurate and timely information about train times	143	118	147	124	123	103
Getting a seat on the train	143	116	155	104	125	124
My personal security on the train	136	121	143	111	130	168
Being kept informed about delays and the options I might have	135	135	147	129	123	124
My personal security at stations	118	108	124	107	118	153
Quick journey times	112	110	80	94	110	121
Inside of trains being clean and well-maintained	107	104	109	108	106	94
A railway that can cope with adverse weather events*	104	119	97	97	123	113
Easy to buy the right ticket	98	113	101	103	88	84
Trains and stations easily accessible by older and disabled people*	94	110	98	114	110	112
Good connections with other train services	81	85	85	103	92	73
Engineering works planned to keep passenger disruption to a minimum	80	93	72	84	84	115
Comfortable seats on trains	80	79	85	71	71	83
Good connections with other public transport at stations	76	80	79	98	97	82
Well-maintained, clean toilets on the train	75	89	80	100	96	74
An environmentally responsible railway that is reducing its carbon emissions	60	74	56	90	67	64
Helpful staff at stations	56	72	67	80	84	67
Stations being clean and well-maintained	54	73	55	81	67	57
Helpful staff on trains	52	68	63	77	86	58
Reliable Wi-Fi and mobile reception on trains	44	57	48	87	92	59
Easy to claim compensation when delayed	40	61	41	76	54	61
Sufficient space on the train for luggage	36	52	36	68	49	53
Base	*12,565*	*113*	*88*	*78*	*41*	*35*

MXD1 Please tell us which of the items are most important to you when travelling by train.

Note: Very low base size <50 for Stansted Express and Heathrow Express

Expectations exact wording

* *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

** *Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

WHAT IS IMPORTANT VERSUS PERFORMANCE BY TOC

quadrangle

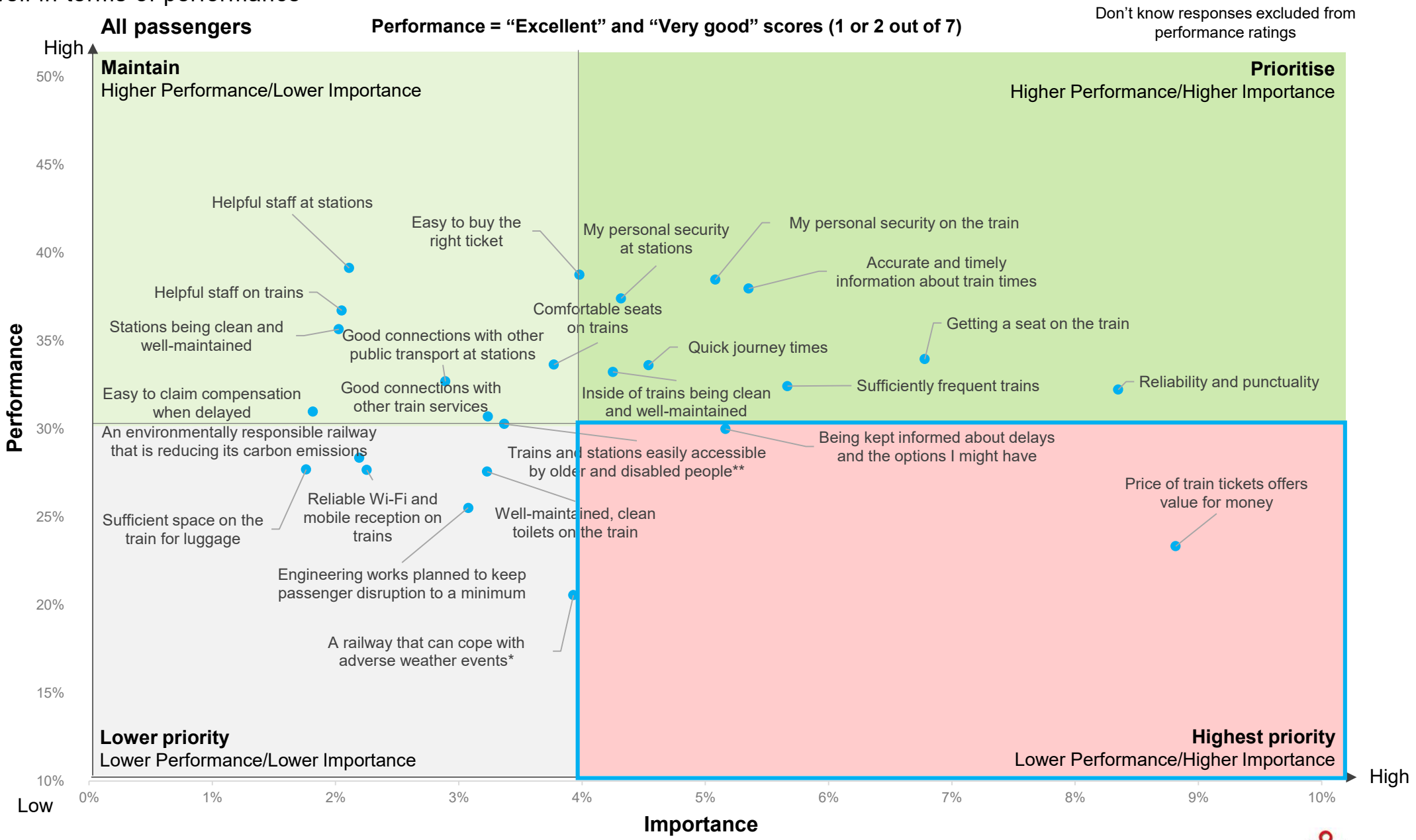
DATA PRESENTED FOR ALL TOCS WITH A SAMPLE SIZE OF MORE THAN 100

© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – AVANTI

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Avanti passengers (n=691)

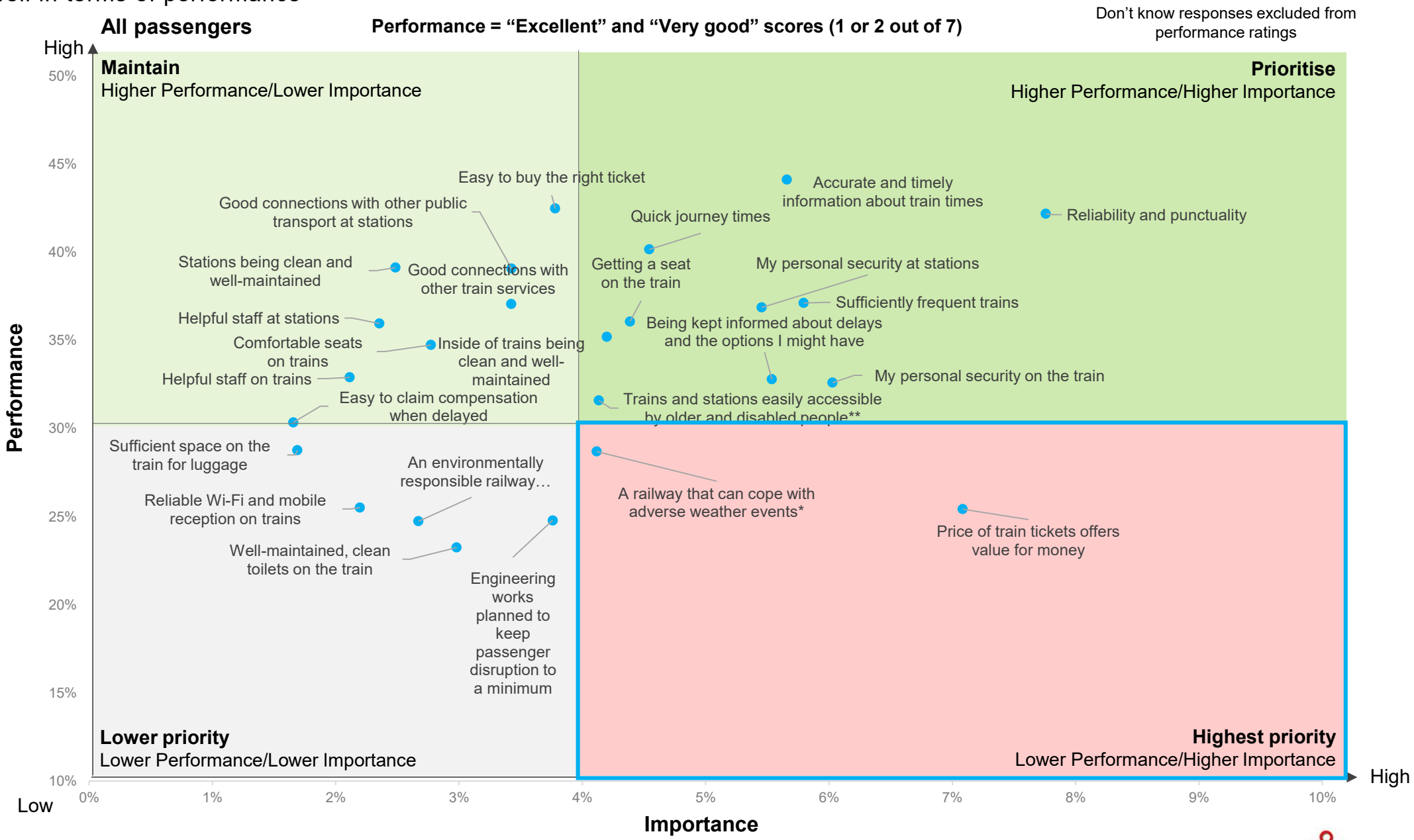
Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – C2C

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All c2c passengers (n=259)

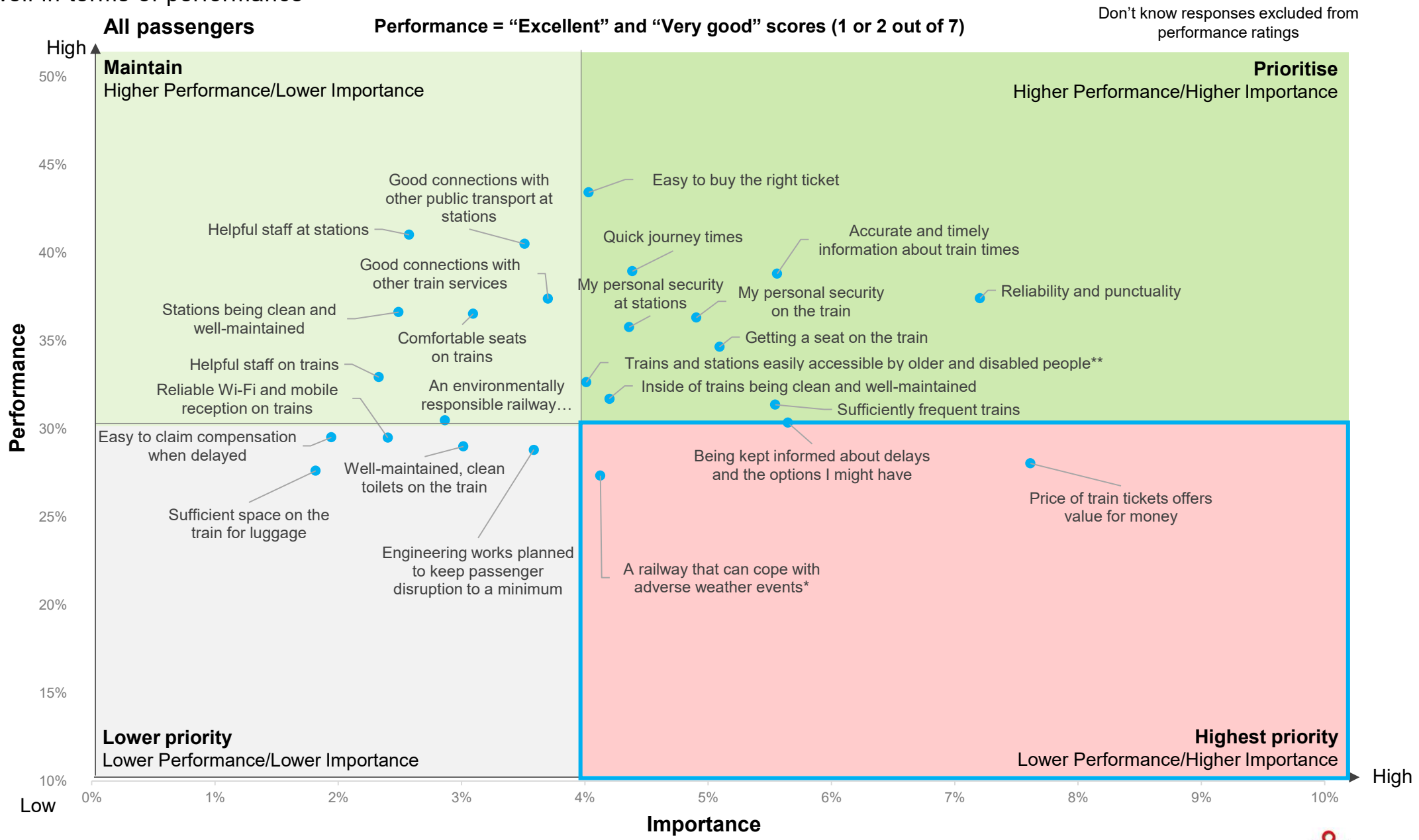
Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – CHILTERN RAILWAYS

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



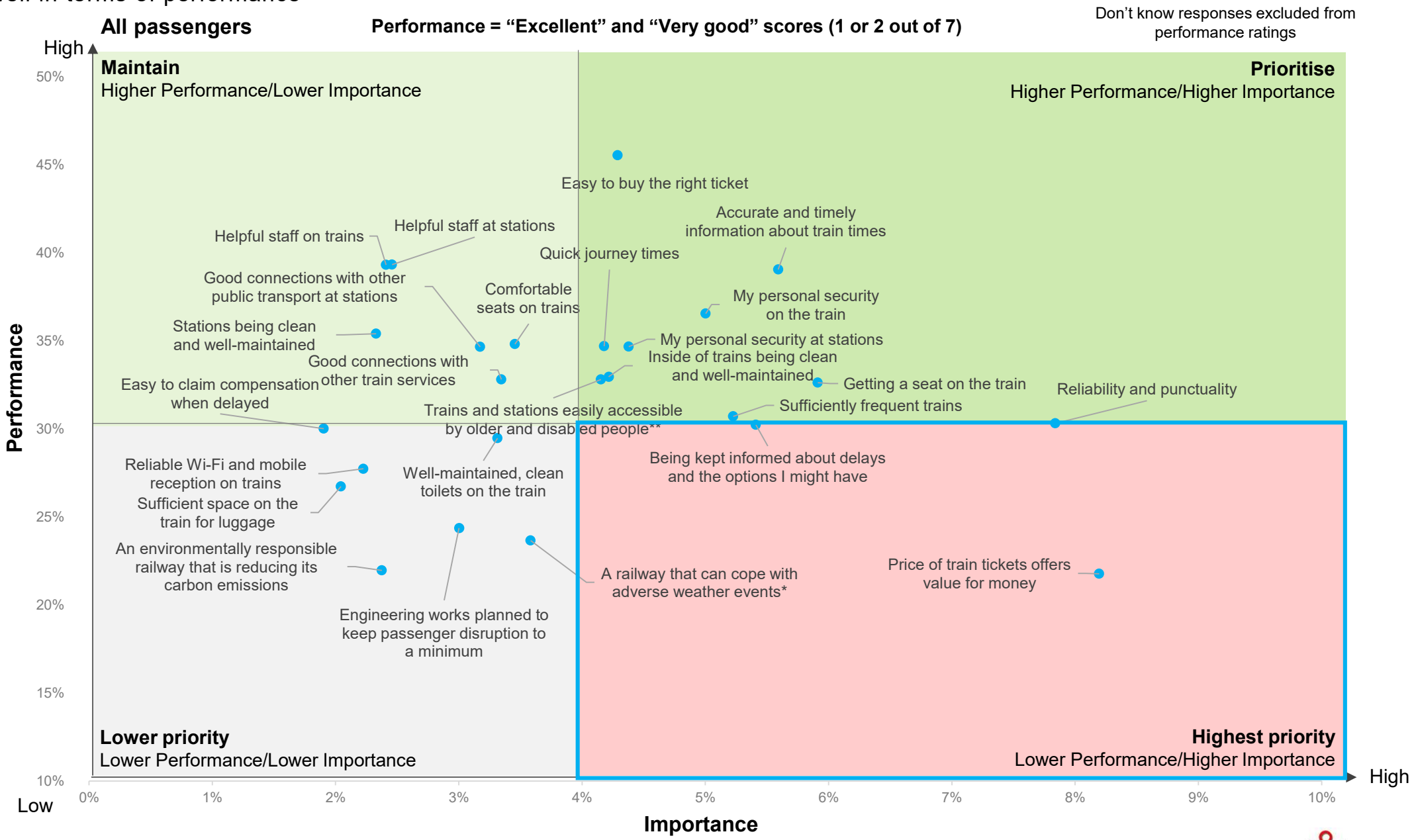
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Chiltern Railways passengers (n=255)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – CROSSCOUNTRY

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

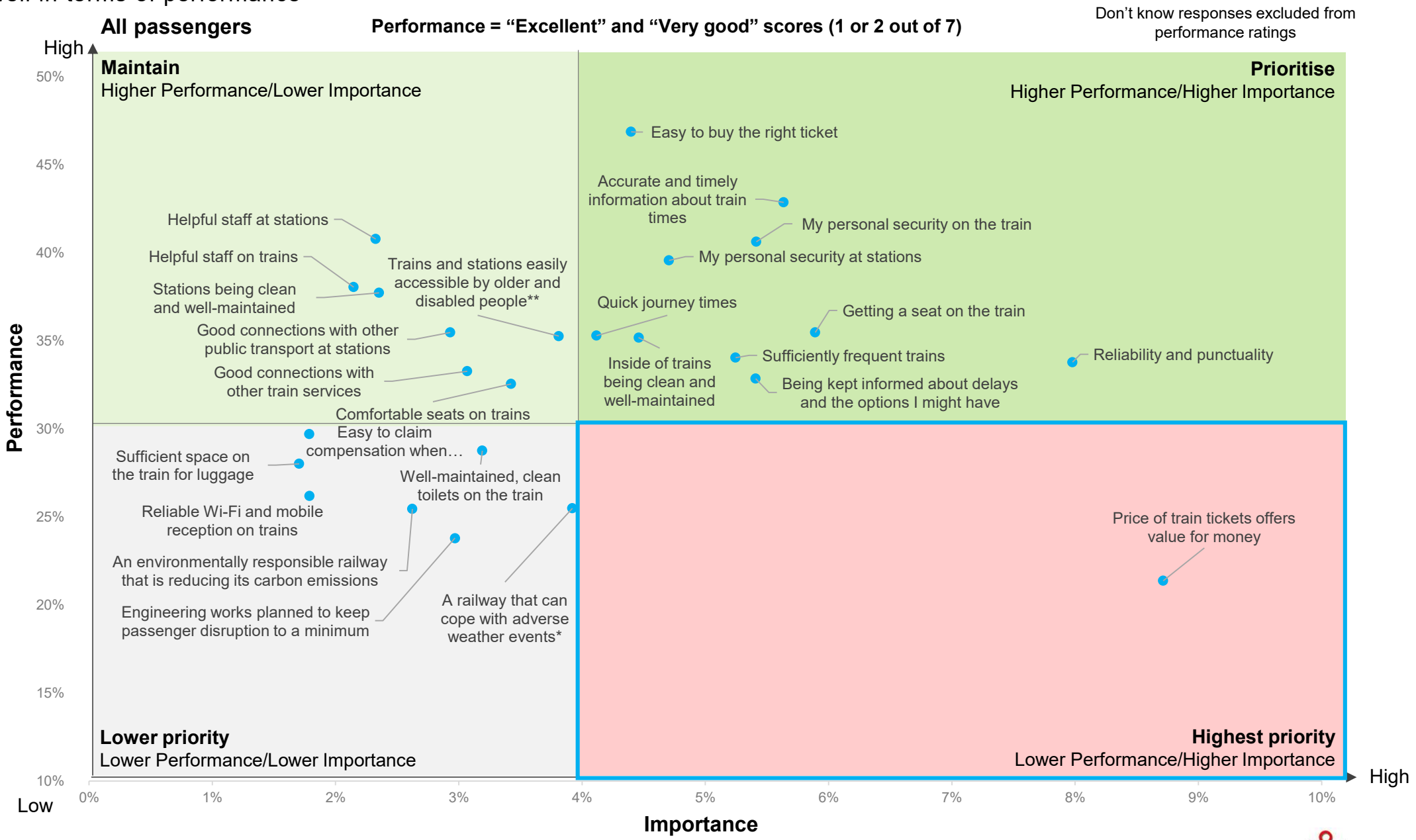
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All CrossCountry passengers (n=359)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – EAST MIDLANDS RAILWAY

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

December 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All EMR passengers (n=723)

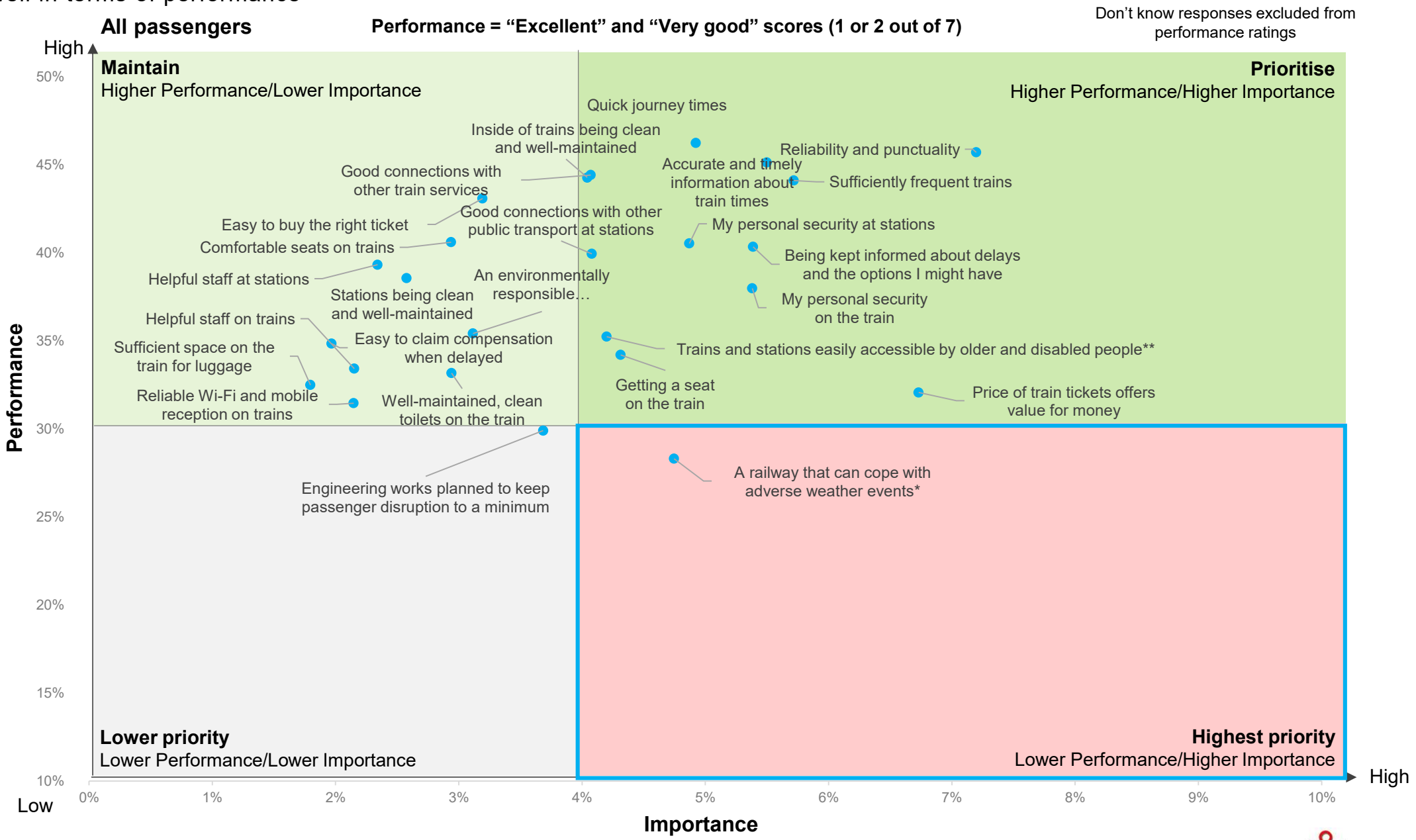
Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

transportfocus

IMPORTANCE VERSUS PERFORMANCE – ELIZABETH LINE

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

December 2022

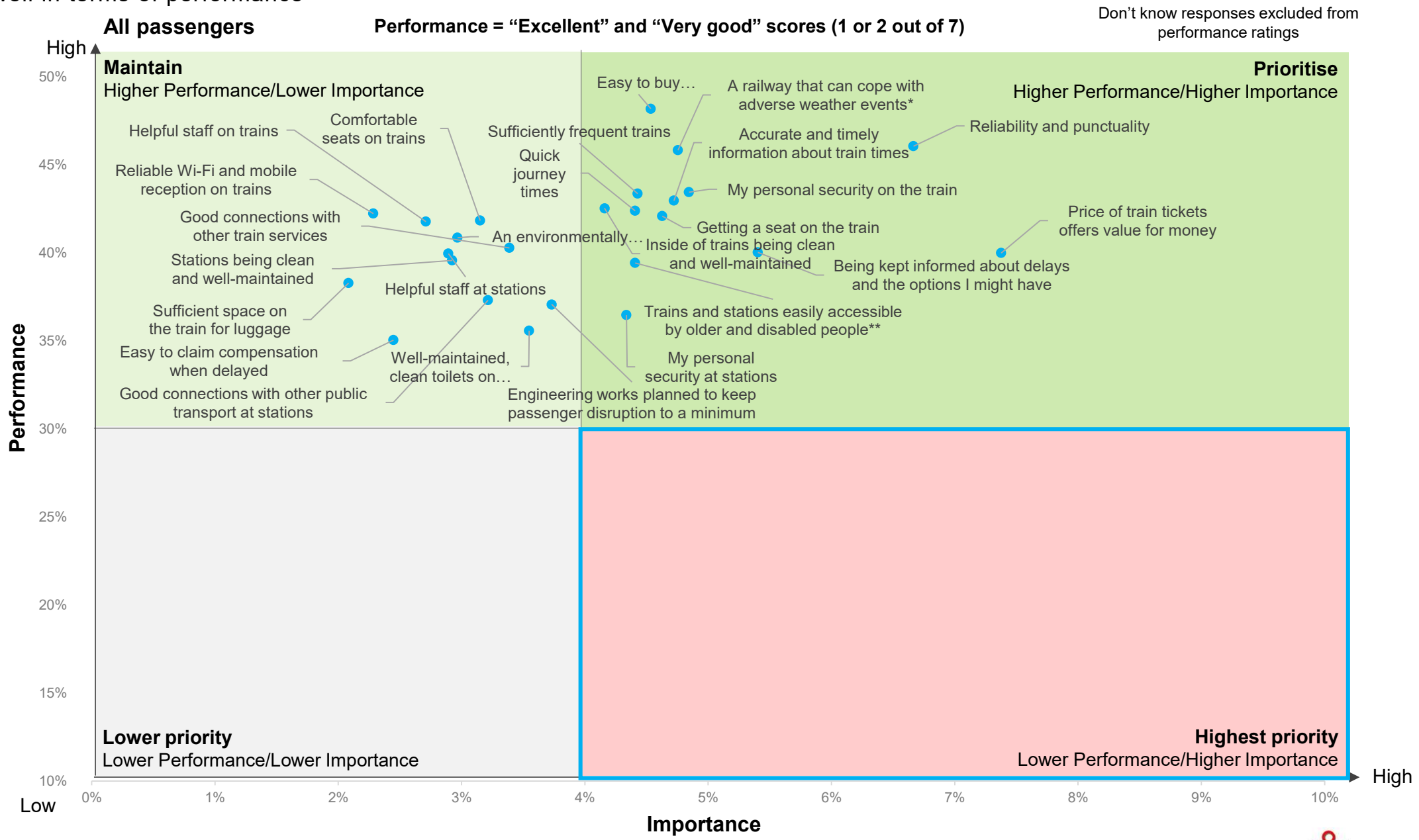
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Elizabeth Line passengers (n=310)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – GRAND CENTRAL

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



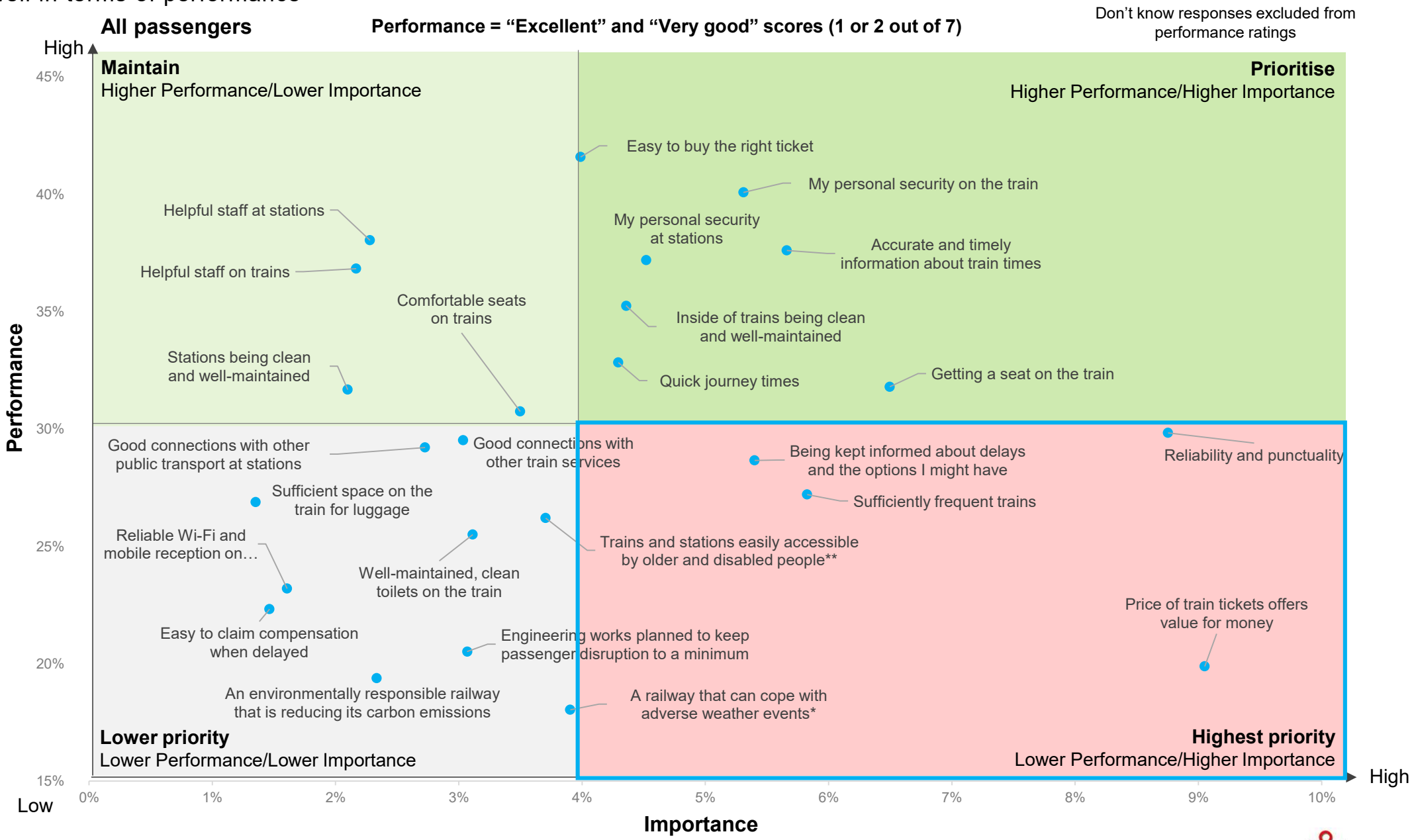
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Grand Central passengers (n=113)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – GREAT WESTERN RAILWAY

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

December 2022

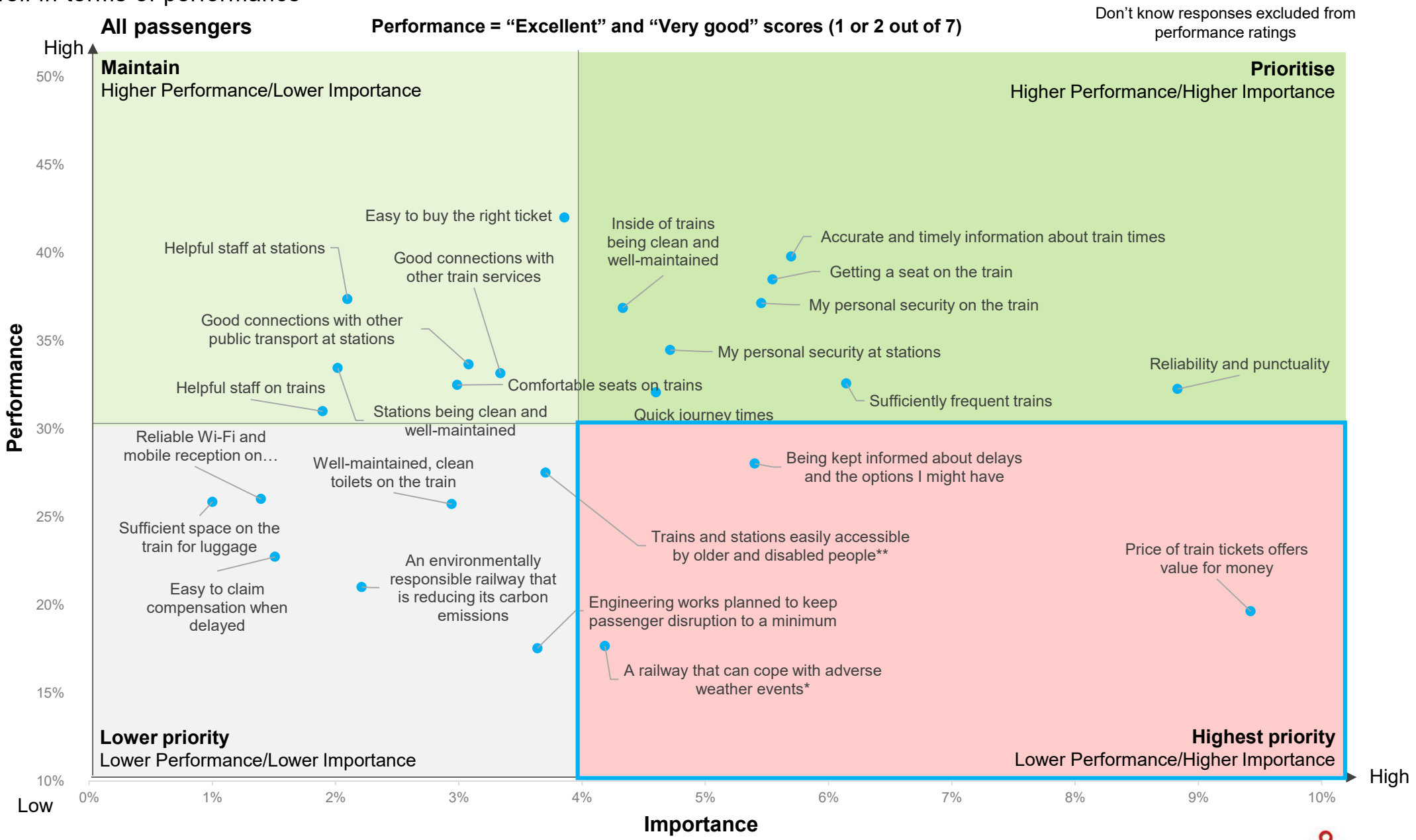
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All GWR passengers (n=1116)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – GREATER ANGLIA

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



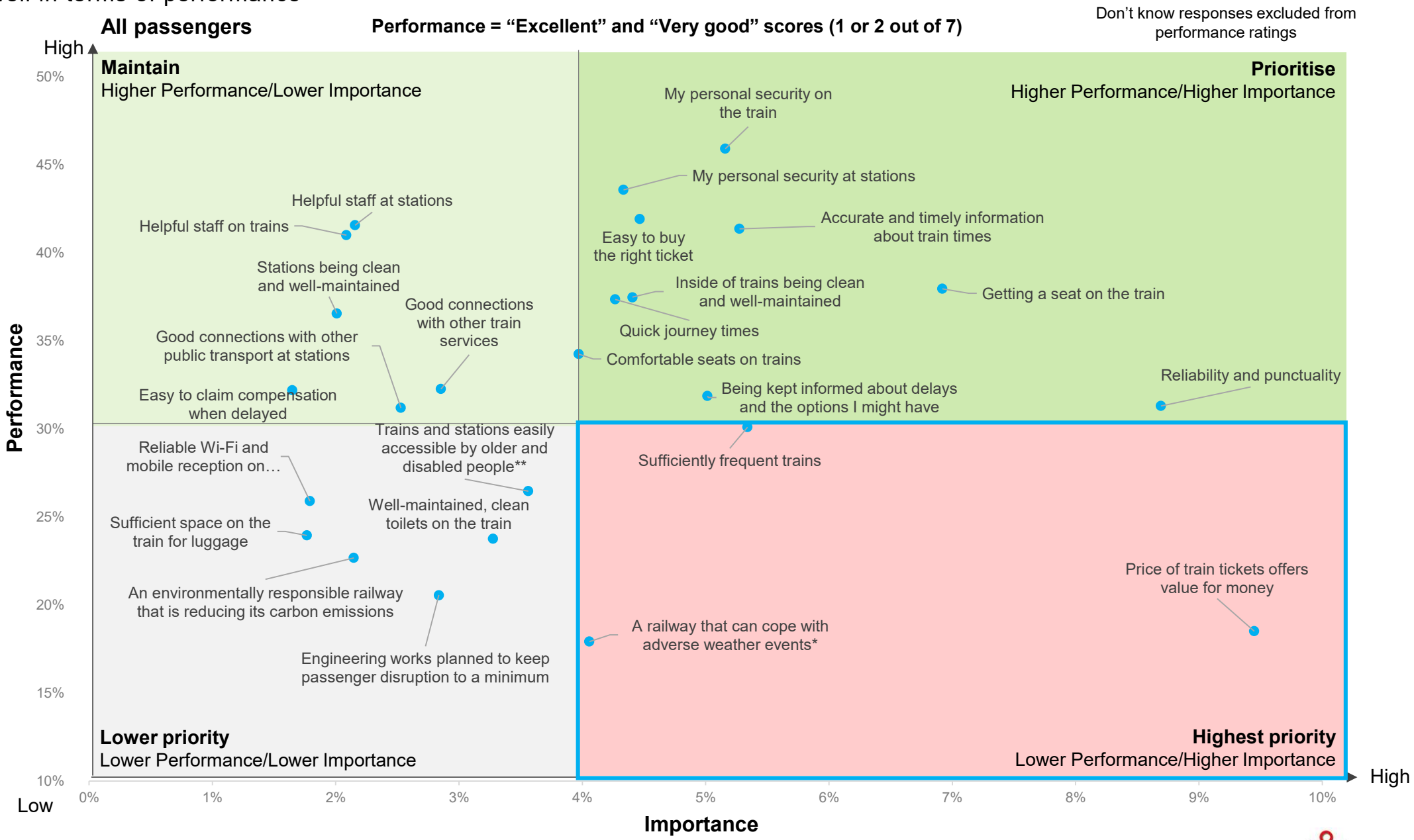
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Greater Anglia passengers (n=620)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – LNER

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

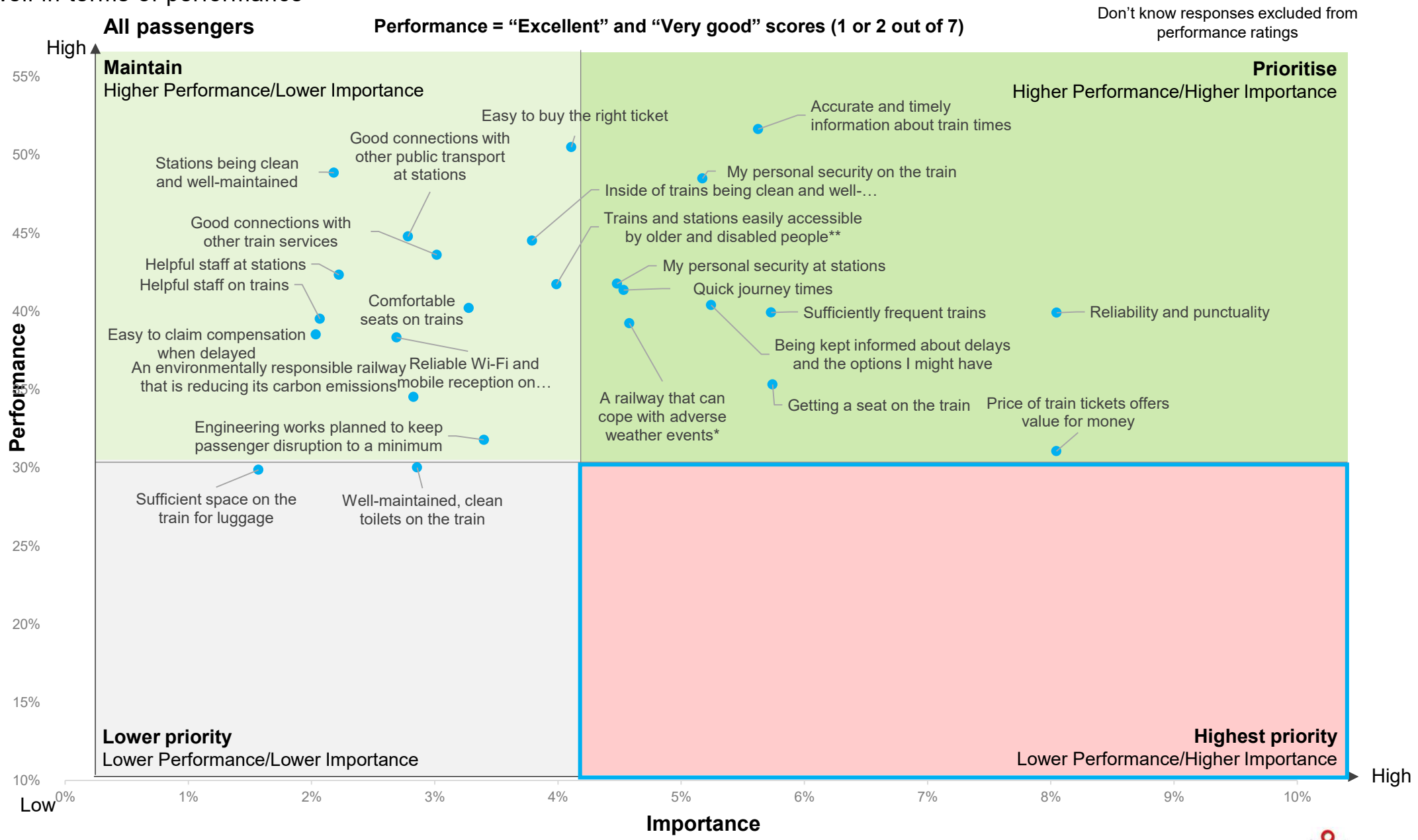
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All LNER passengers (n=606)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – LONDON NORTHWESTERN RAILWAY

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All London Northwestern Railway passengers (n=146)

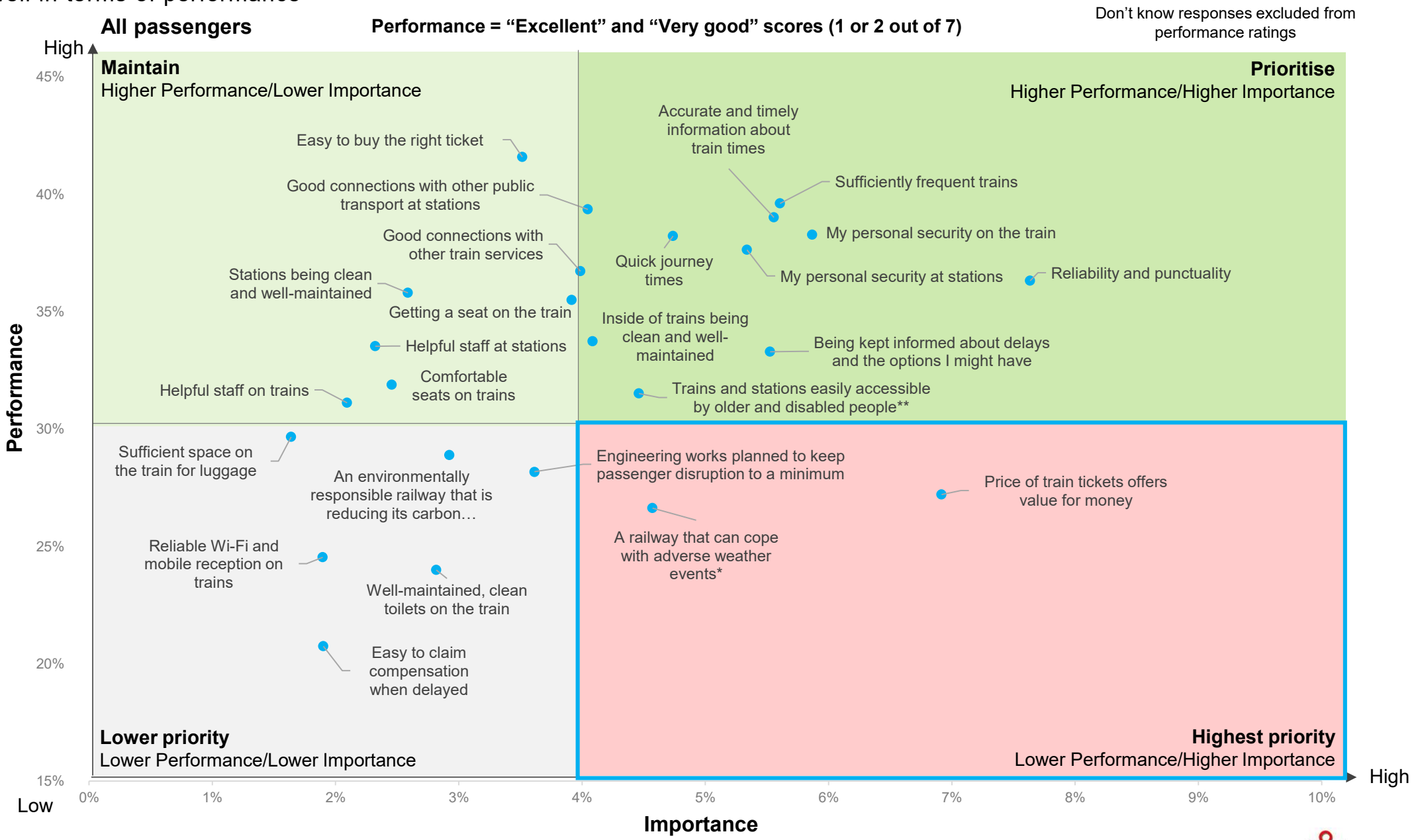
Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – LONDON OVERGROUND

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

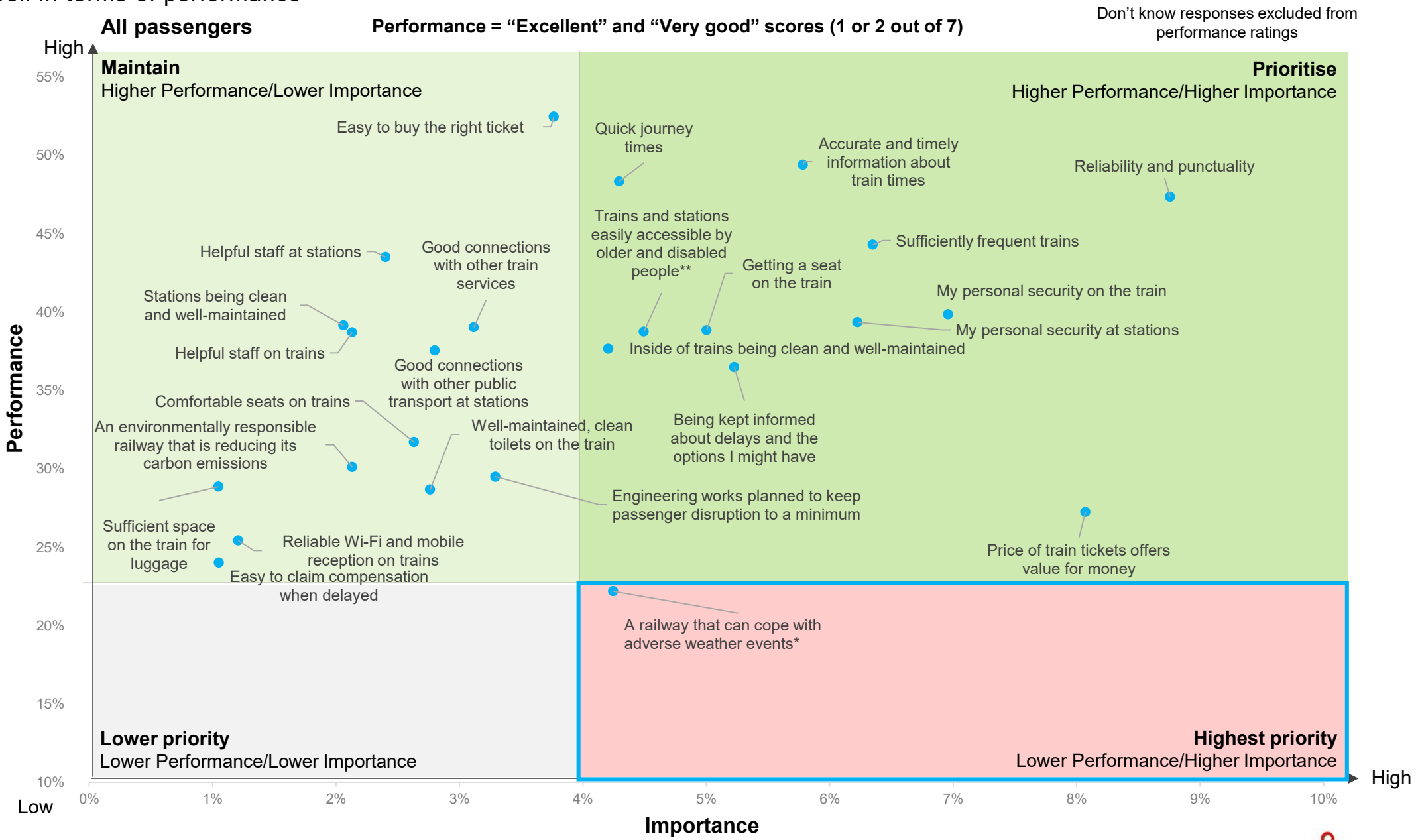
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All London Overground passengers (n=481)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – MERSEYRAIL

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance

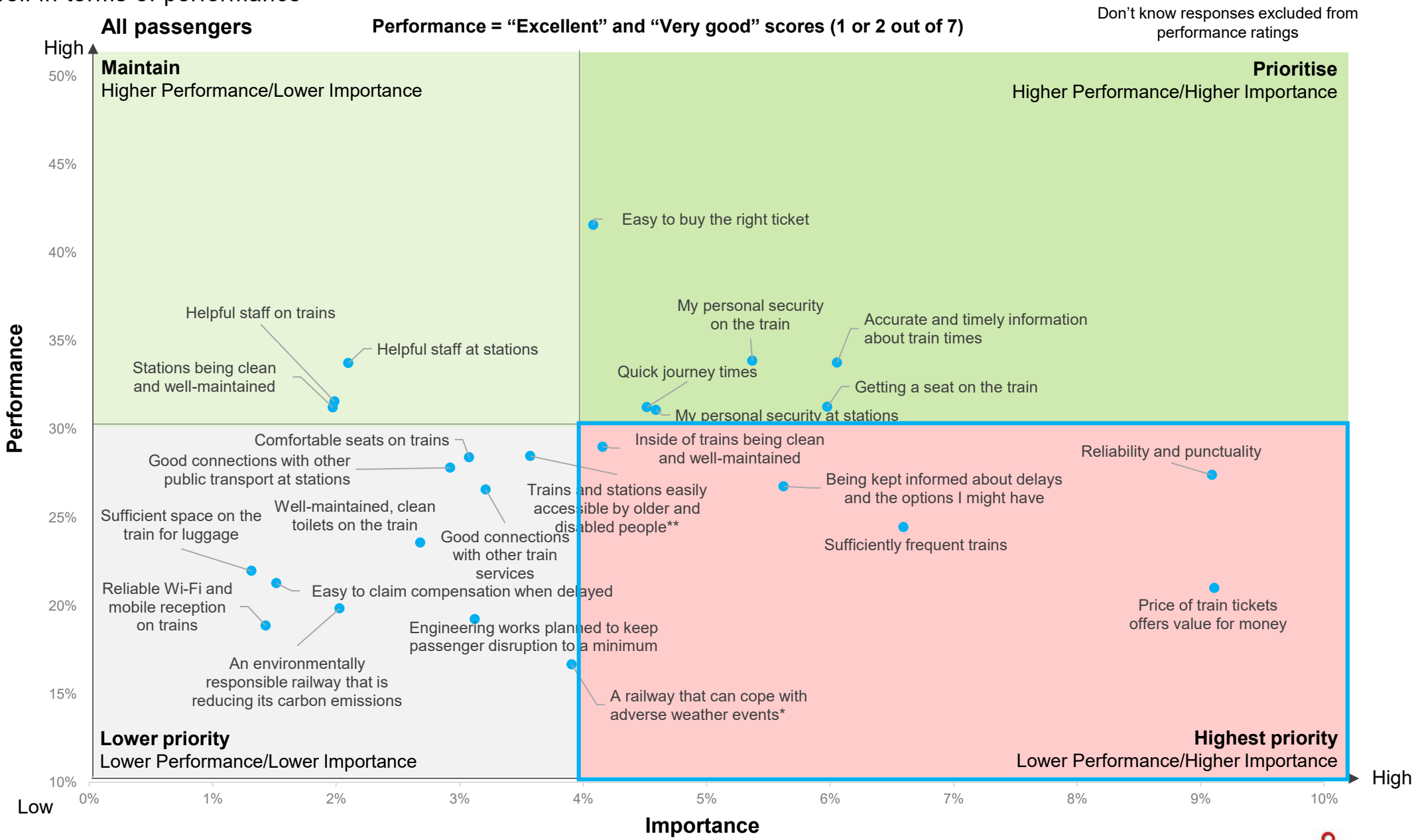


MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All MerseyRail passengers (n=259)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – NORTHERN

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

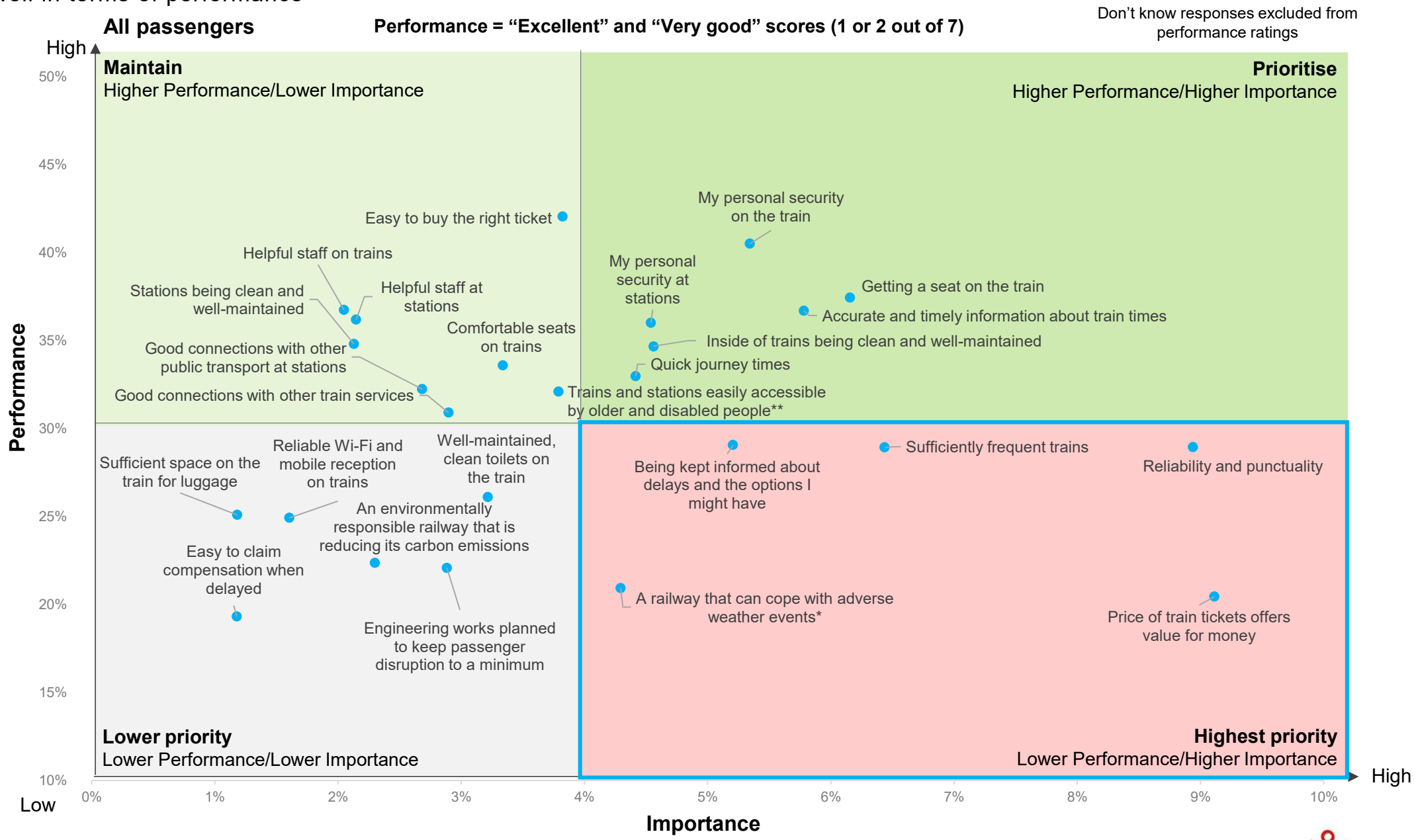
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Northern passengers (n=1,104)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – SCOTRAIL

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

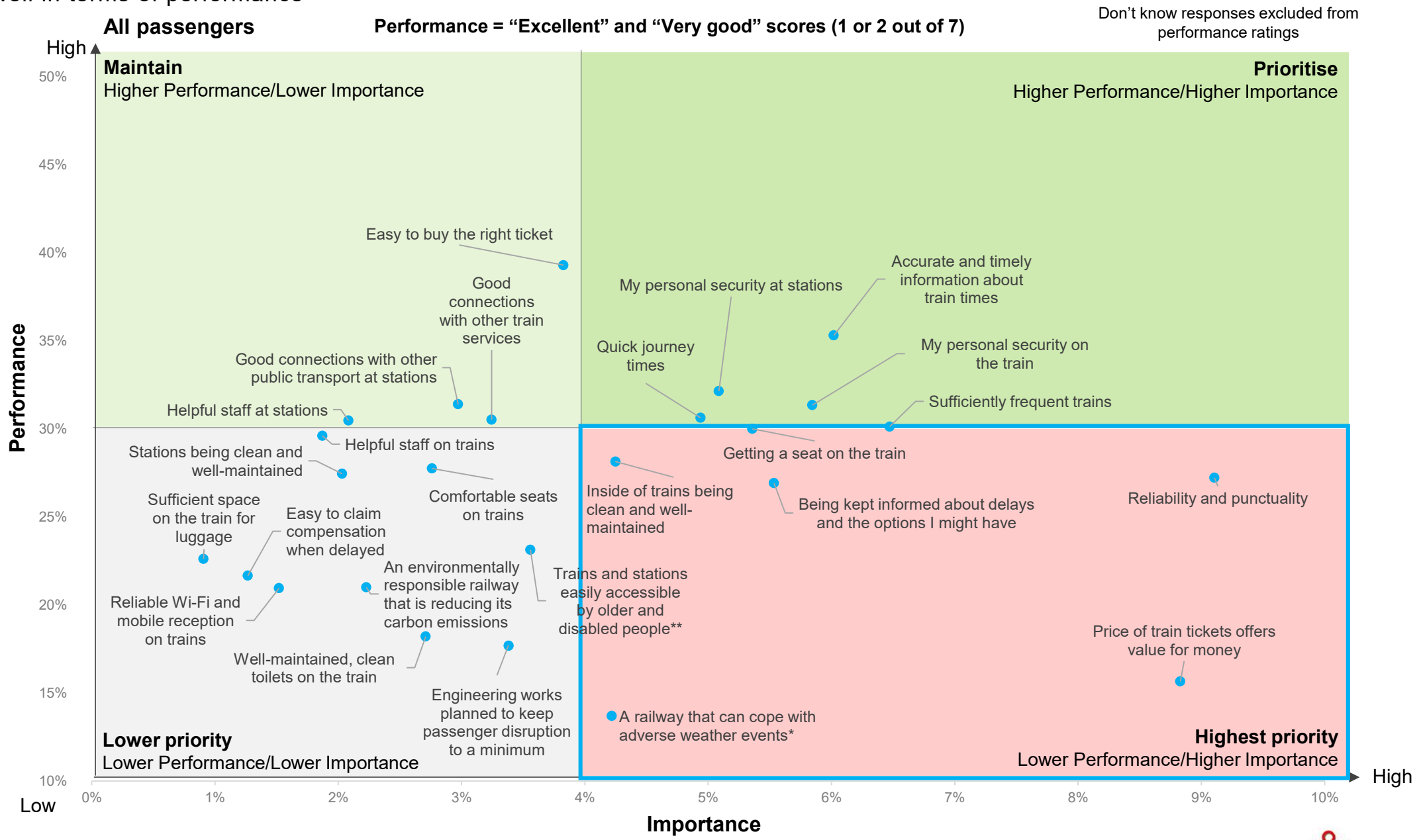
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All ScotRail passengers (n=811)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – SOUTHEASTERN

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



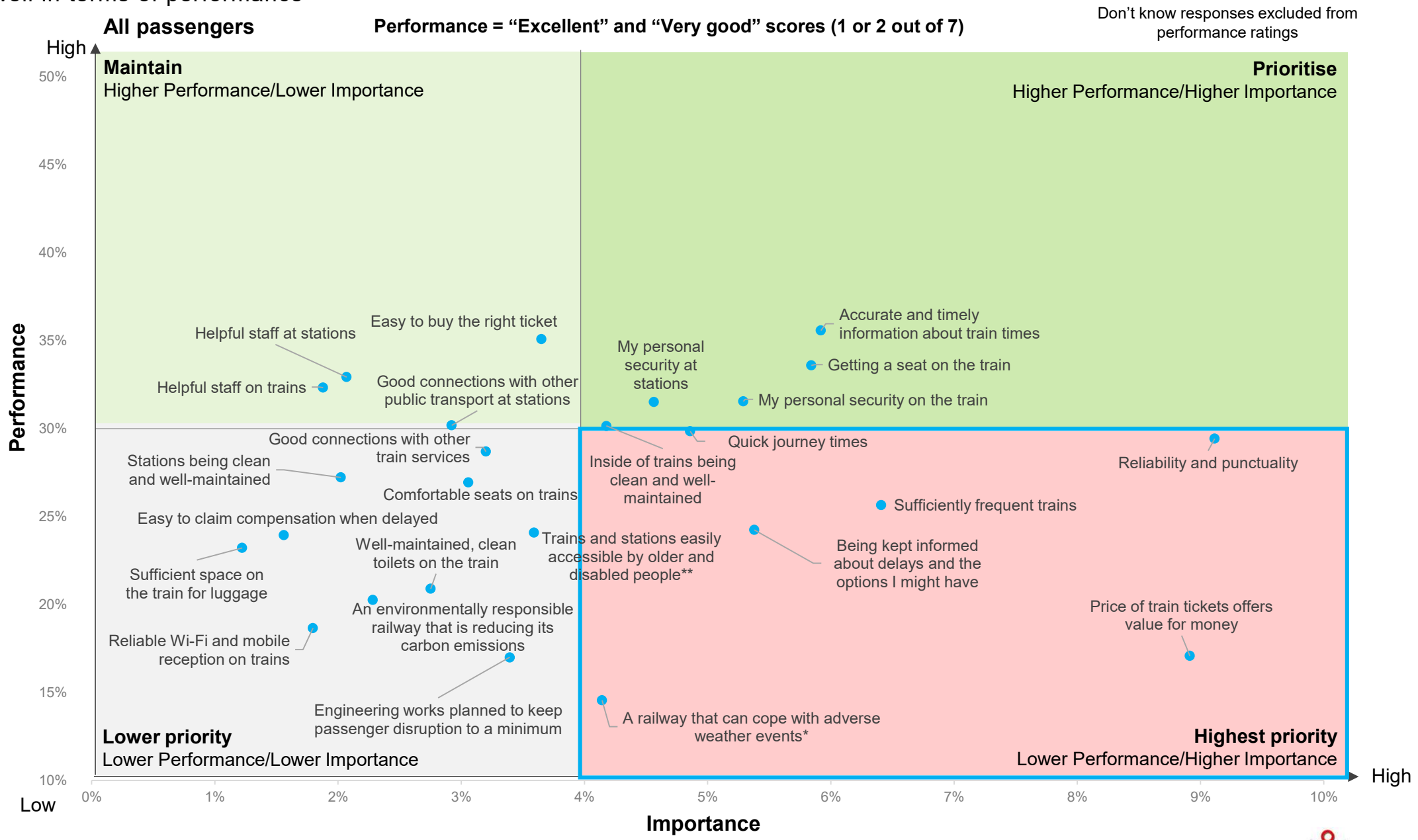
© Quadrangle 2022

MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Southeastern passengers (n=724)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – SOUTH WESTERN RAILWAY

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



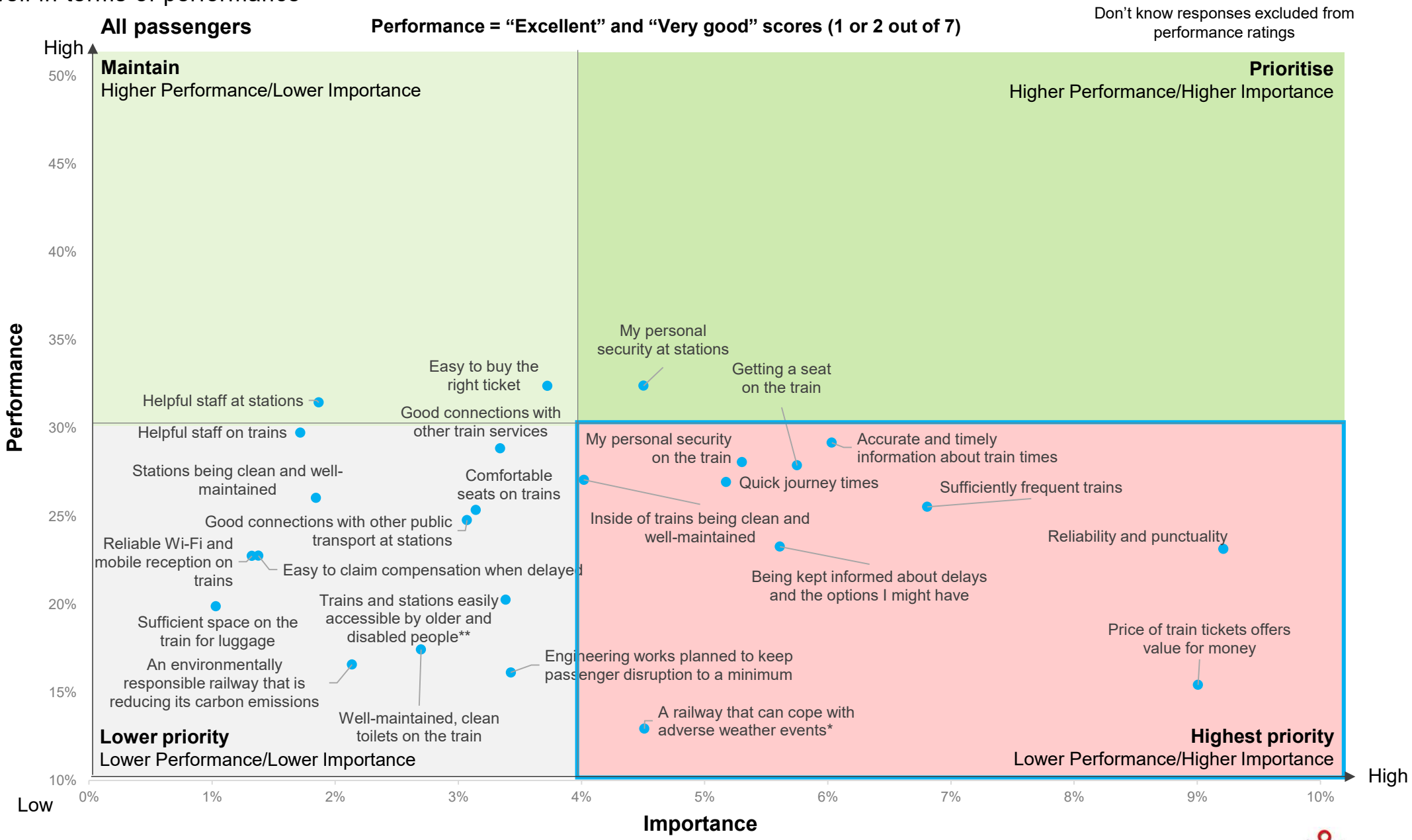
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All South Western Railway passengers (n=790)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

© Quadrangle 2022

IMPORTANCE VERSUS PERFORMANCE – SOUTHERN

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



© Quadrangle 2022

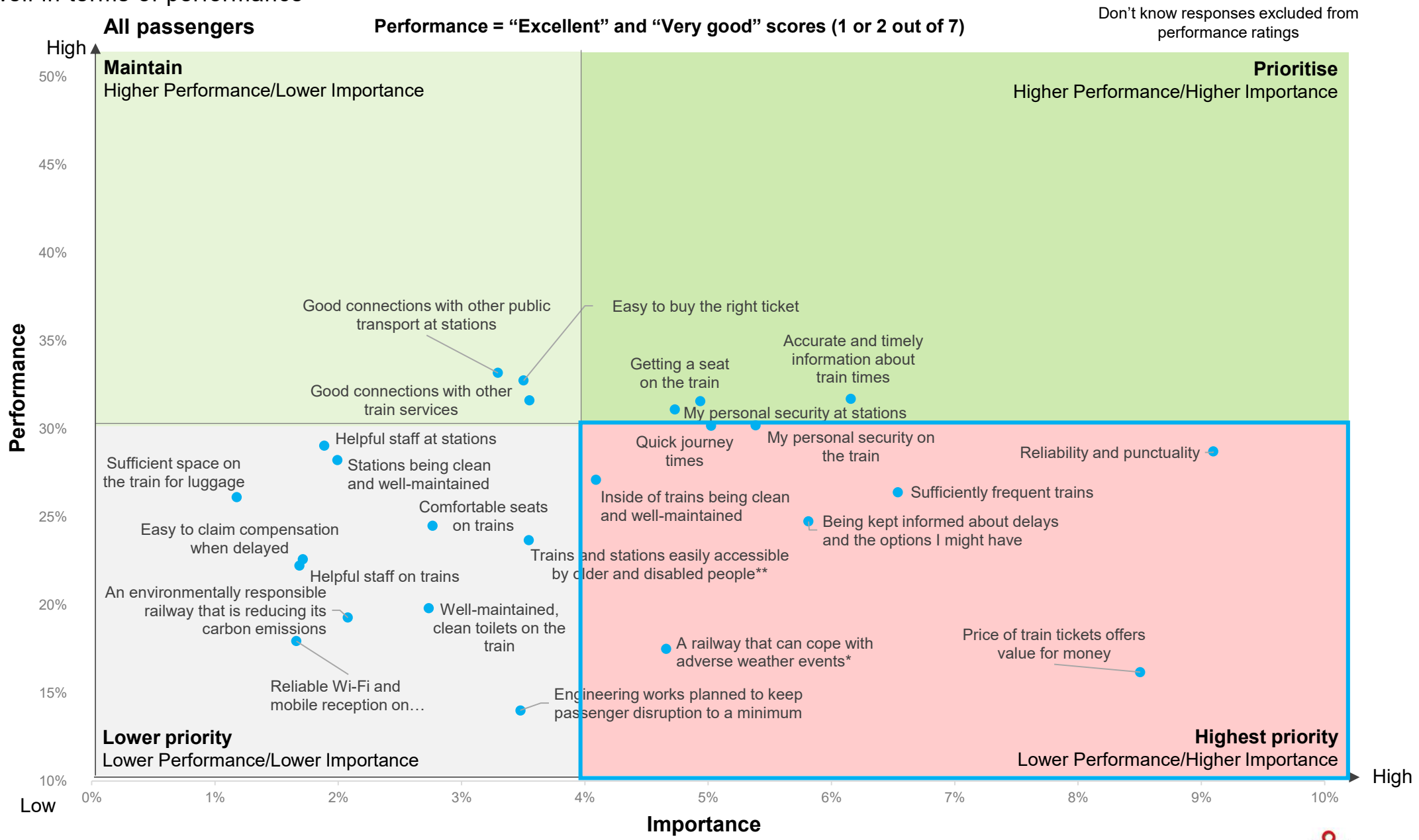
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Southern passengers (n=464)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – THAMESLINK

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Thameslink passengers (n=385)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – TRANSPENNINE EXPRESS

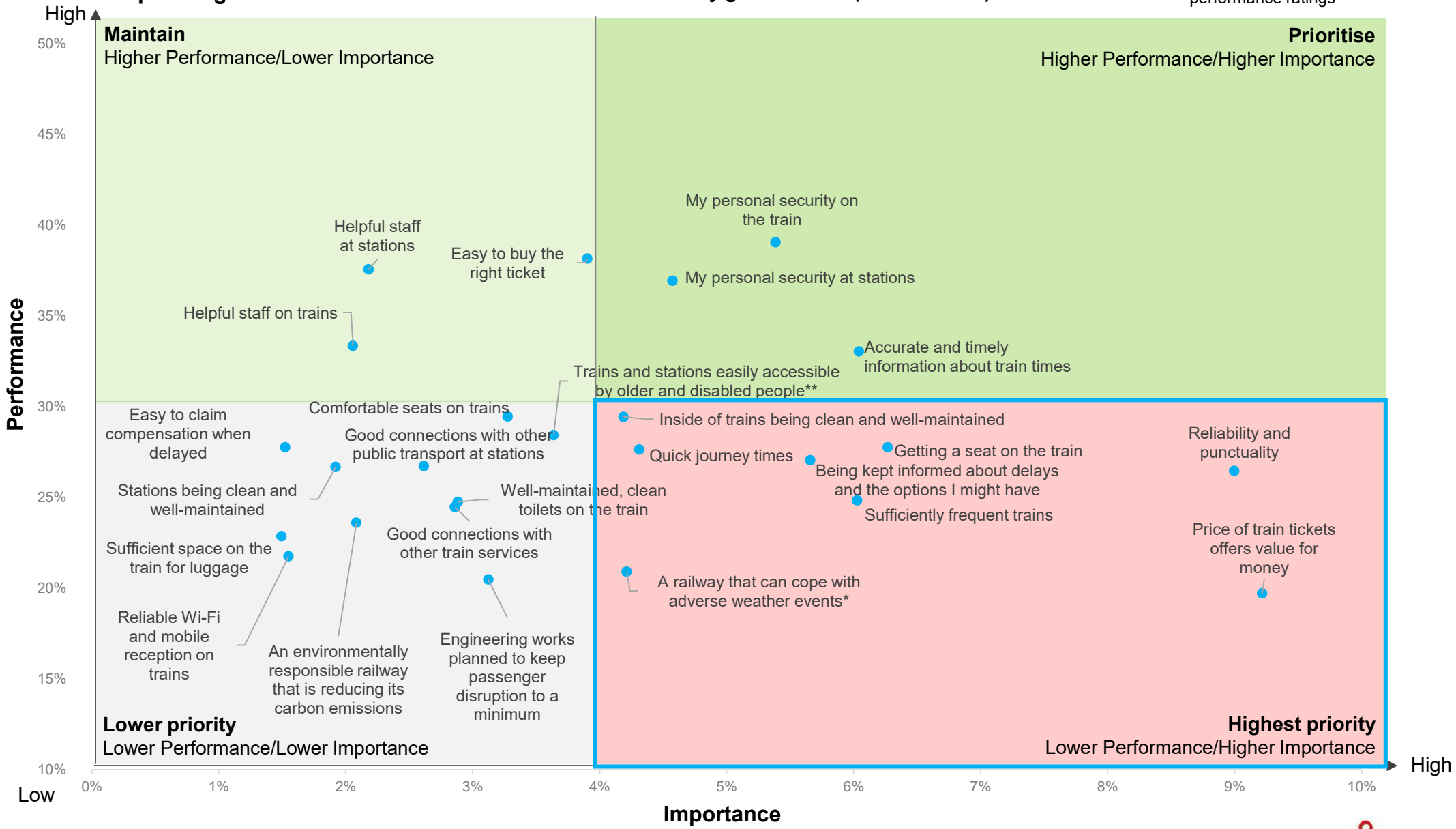
quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance

All passengers

Performance = "Excellent" and "Very good" scores (1 or 2 out of 7)

Don't know responses excluded from performance ratings



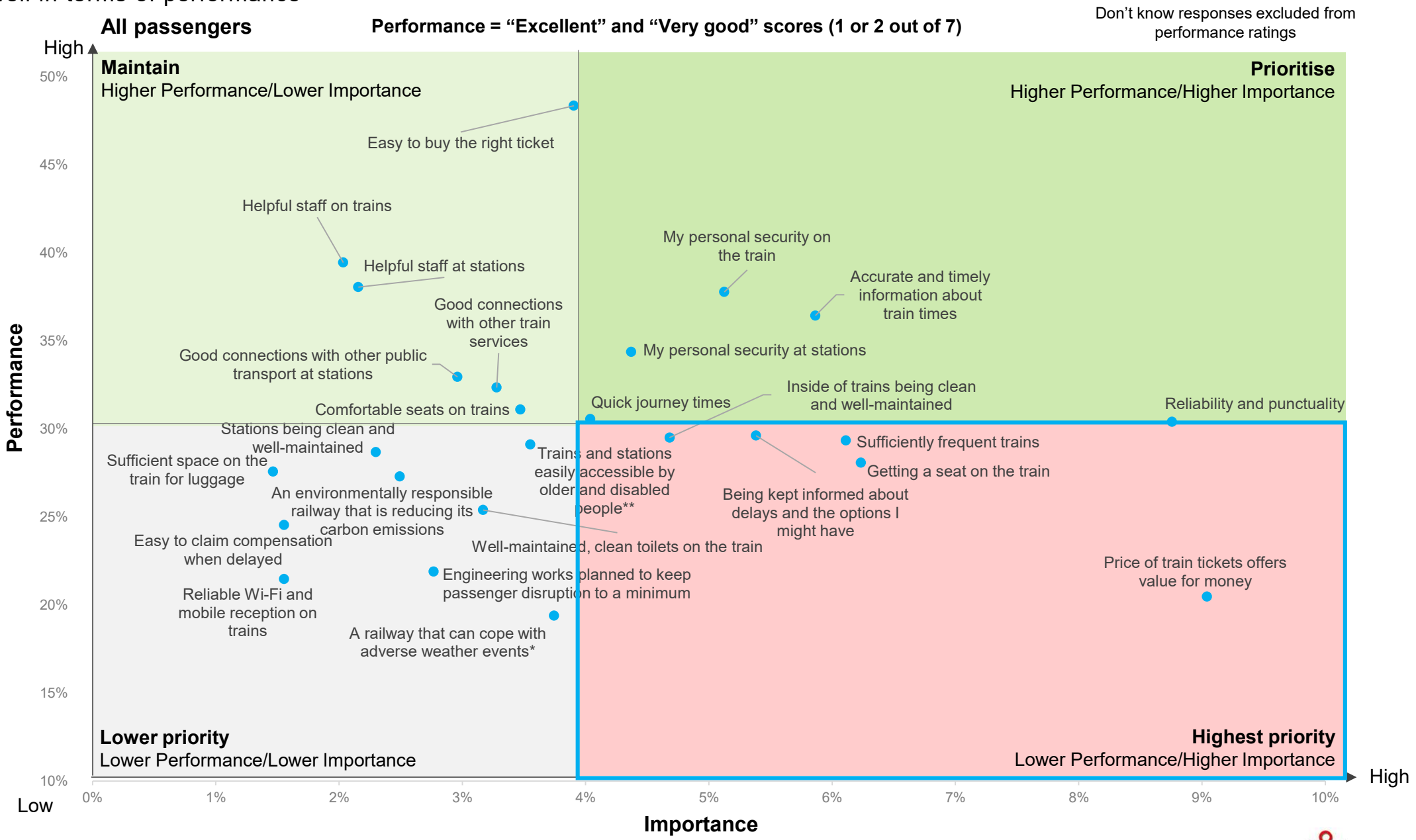
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All TransPennine Express passengers (n=374)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – TRANSPORT FOR WALES

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



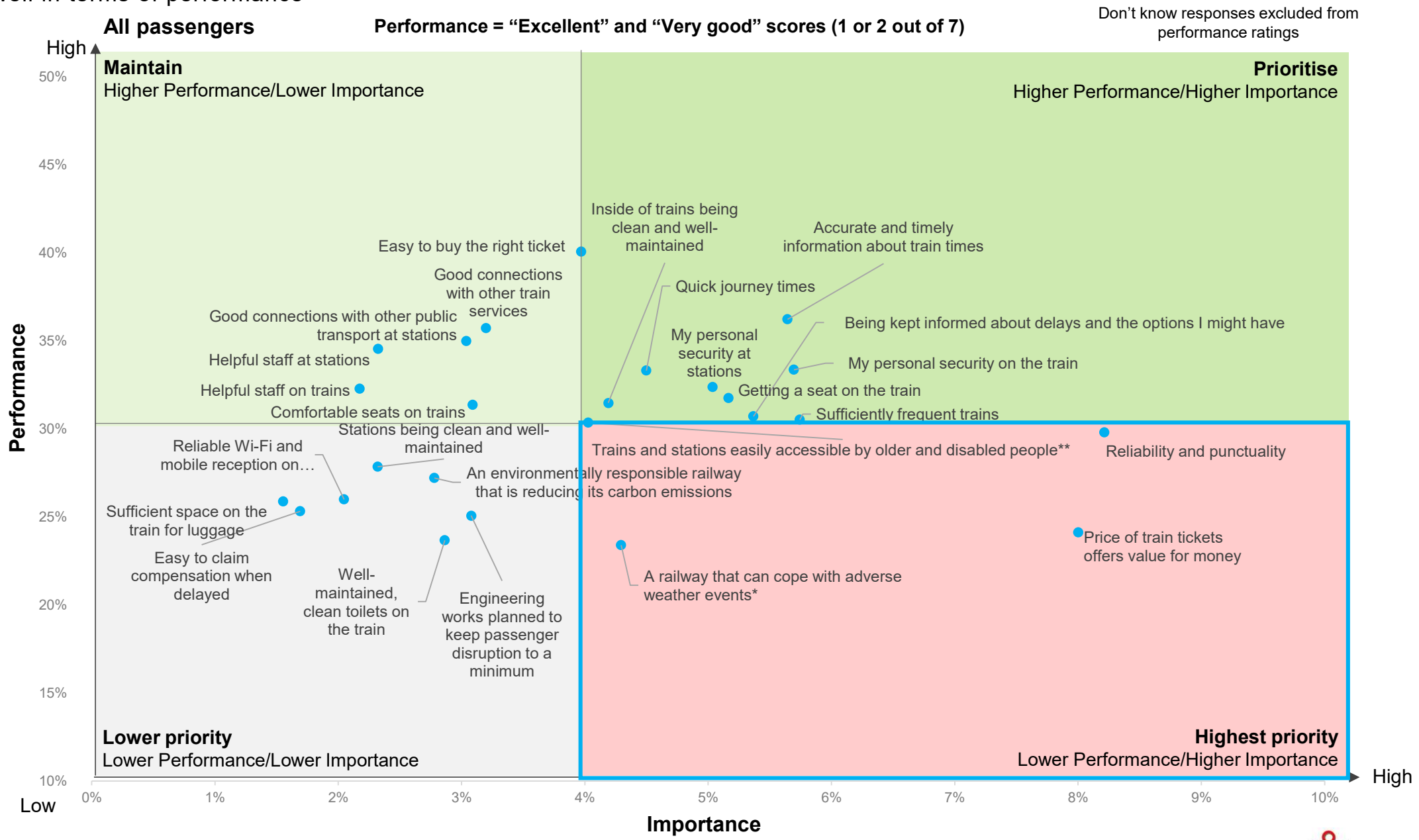
MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All Transport for Wales passengers (n=336)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

IMPORTANCE VERSUS PERFORMANCE – WEST MIDLANDS RAILWAY

quadrangle

The features in the pink box are the highest priority as they are the most important and score less well in terms of performance



MXD1 Please tell us which of the items are most important to you when travelling by train.
QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All West Midlands Railway passengers (n=575)

Expectations exact wording
** A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*
*** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.*

GWR

RESEARCH METHODOLOGY (I)

Details of the method used for this major online survey conducted in the summer of 2022 among train passengers in Great Britain.

15,226 online interviews were completed with rail passengers in Great Britain. Fieldwork took place from 11th – 24th August 2022. This was soon after the end of a heatwave in Britain, with temperatures well above 30°C during the middle of July, and 40°C recorded in the UK for the first time ever on 19th July. During the heatwave, rail services were disrupted, with restricted timetables and speed restrictions on some lines. This is worth noting because within the survey we ask about how important it is that the railway "can cope with adverse weather events e.g. snow, wind, flooding and extreme heat." Overall, this ranked 11th in importance to passengers out of the 25 features tested.

While it is possible that the timing of the research could have impacted its ranking, it is worth noting that it also ranked 11th and 12th in Scotland and Wales respectively, where the impact of the heatwave was less extreme. It is also relevant to observe that the record temperatures beat the previous record high which occurred as recently as 2019, so these types of weather events have been on the rise in recent years.

All passengers		Interviews
Current passengers	Travelled in last 3 months	10,179
	Travelled in last 4 – 12 months	2,386
Lapsed Travellers	Travelled during 2019 to July 2021	2,661
All		15,226

RESEARCH METHODOLOGY (II)

Among the current passengers, we identified the purpose of their journeys and asked many of the subsequent questions in the survey about one of those types of journey which they make most frequently. Obviously, many travellers use the rail for multiple purposes, in these instances the journey purpose selected to be asked about was done so on a “least full” basis. This seeks to ensure that journey types were asked about as evenly as possible. For example, if a respondent travelled by train for both leisure and for commuting, they were asked about the journey purpose which had been covered by the fewest number of passengers up to that point in the research. By using this technique, we were able to ensure we achieved a reasonable base for analysis for each of the journey types (see opposite 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, gender, social grade, region and recency of travel (past 3 months, 4-12 months, over 12 months). Using the same profile characteristics, the final data was also weighted to take account of minor differences to the omnibus survey results.

Current passengers		Interviews
Commuter	travelling to and from work or place of education	2,329
Business	travelling for work	2,323
Leisure	travel for enjoyment e.g. visiting friends/relatives, shopping, holidays, day trips, for sport etc.	5,576
Personal Business	travel for medical appointments, job interviews, banking etc.	2,337
All current passengers		12,565

quadrangle

Using MaxDiff to measure the relative importance of different aspects of the journey experience

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 that they take by train for a specific purpose; a journey for commuting, business, leisure or for personal business.

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

The table opposite lists the 25 features of the railway included in the MaxDiff exercise. The results from this exercise, presented in this report, 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 e.g. 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 etc.
25	Well-maintained, clean toilets on the train

© Quadrangle 2019

Quadrangle Research Group
The Butlers Wharf Building
36 Shad Thames

London SE1 2YE
quadrangle.com
+44 (0)20 7357 9919

Research. For decision makers.