POTENTIAL RAIL INDUSTRY INITIATIVES – PASSENGER SATISFACTION ANALYSIS ◤ quadrangle

A research study conducted for Transport Focus and GBRTT

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The primary goal of this work is to understand the extent to which more than 50 potential initiatives could impact on passengers' satisfaction with their experience travelling by rail. It sits alongside a wider, more strategic piece of work also conducted in 2022 (and described below) which sought to understand what, overall, matters most to passengers when they travel by rail.

The 59 initiatives in this study are designed to be specific things that the railway could potentially implement e.g. CCTV on every train, being able to tap in and out at stations using contactless cards, the ability to see how often a train has been cancelled or delayed when making a booking etc.

The research was designed to help inform the railway's long-term planning and help decision makers understand how impactful different initiatives might be in terms of customer satisfaction. Other factors, such as the cost of implementing them, will be used alongside these findings to help prioritise which of the initiatives, if any, will be progressed.

The wider, strategic study *"Britain's railway – what matters to passengers"*, sought to understand broader rail passenger needs. The 25 features of the railway assessed in the wider piece were designed to provide an overview of what is most important to people when travelling by rail. So, rather than specific initiatives, it captured the importance of themes such as the reliability and punctuality of trains, and the price and value for money of tickets. These themes were therefore not tested in the study described in this report.

In summary, the work reported on in this document looked at what practical, targeted initiatives can be made to improve people's experience of the railway.

Britain's railway – what matters to passengers
Rank order of importance

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

Increasing importance to passengers

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Objectives

To help prioritise more than 50 rail passenger initiatives by seeking to understand:

- the extent to which passengers believe they will have a positive impact on their satisfaction of travelling by rail;

- the impact of the initiatives on relevant customer satisfaction at each journey stage;

- the impact of initiatives on overall customer satisfaction, and;

- how the impact might vary depending on different passenger types.

Summary of Methodology

- 15-minute online survey among 3979 rail passengers who have travelled by train in the last 12 months

- Data weighted to proportions set by a nationally representative Computer Assisted Telephone Interviewing (CATI) omnibus of those who have travelled by train in the last 12 months, carried out in August 2022

- Good spread achieved, including those with children (n=1689) and disabled passengers (n=755)

Quota		Weighted %	Unweighted Base
Age	18-24	13%	556
	25-34	22%	661
	35-44	18%	832
	45-54	17%	690
	55-64	16%	669
	65+	14%	571
Gender	Male	52%	2058
	Female	48%	1913
SEG	A	10%	490
	B	21%	1013
	C1	29%	1250
	C2	21%	662
	D	10%	325
	E	7%	217
Overall region	North	30%	1173
	Midlands	29%	1104
	South	41%	1702

WHO WE SPOKE TO IN THIS STUDY

We surveyed 3,979 rail passengers across a broad cross section of frequencies, purposes and regions.

Data has been weighted to be reflective of rail passengers in the past year by age, gender, socio-economic group and region.

Quota	Detail	Weighted %	Unweighted Base
Last travelled by train	In the last week	50	2155
	In the last month	18	820
	Within the last six months	15	652
	Six months to a year ago	17	352
Journey purpose	Commuting	24	987
	Business	11	453
	Leisure and personal business	65	2539
Purpose and train operating company (TOC) type	Commute Long-distance	3	117
	Commute London and South East	16	612
	Commute Regional	5	198
	Business Long-distance	3	112
	Business London and South East	6	235
	Business Regional	2	65
	Leisure/ personal LD	16	528
	Leisure/ personal London and South East	33	1162
	Leisure/ personal Regional	15	507

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Passengers taking specific types of journey are
more likely than average to comprise:

| Commuters | Business travellers | Leisure | Recent travellers | Less recent travellers |

Travel <u>to and from</u> work or place of education at least once a week

Travel <u>for</u> work

Including personal business travellers

Travel to visit friends/relatives, shopping, holidays, day trips, for sport etc.

Travel for any purpose in the last month

Travel for any purpose in the last six to twelve months

AB socio-economic group

25-44 yr olds

Southern region passengers

Most frequent travellers

Travelling alone

Male passengers

AB socio-economic group

25-44 yr olds

Travelling alone

C1 socio-economic group

55+ yr olds

Less frequent travellers

Travelling as a couple/group or family

Use buses and cars

AB socio-economic group

25-44 yr olds

Use multiple forms of transport
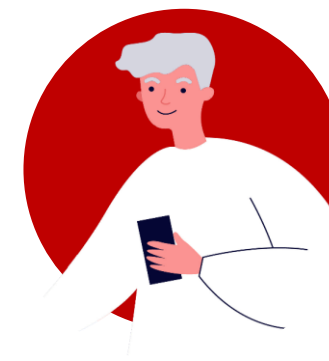
C1 socio-economic group

55+ yr olds

Wales & Western passengers

Use cars

NB: recency of travel has been considered in order to help understand which initiatives might be able to encourage people back to using trains.

For more detail on these profiles, please see the Appendix.

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01

Keeping passengers informed is the top initiative

Consistent, timely and accurate travel information at stations (across all channels) is the initiative most likely to drive greater levels of passenger satisfaction.

Passengers want accurate information, however and whenever they choose to receive it - whether from staff, via an app or on departure boards.

02

Journey purpose impacts the importance of the different initiatives

Commuters say that the provision of accurate and timely information is important to them.

In contrast, **business travellers** have a strong interest in a broader range of initiatives, including simpler ticketing and free and reliable WiFi.

Leisure passengers have similar views of the initiatives to overall passengers (see #01).

03

Initiatives around the provision of information are the top priorities for increasing overall satisfaction

These are initiatives which will make passengers' journeys **smoother and easier**.

For example, optional updates via devices with journey information, real-time information about busyness and crowding, information about journeys to stations, onward travel information, etc.

Interventions around CCTV, accessibility and Wi-Fi also emerge as top priorities.

04

Sufficient trains, running on time is the primary passenger need

When testing the **Nine Needs** from the Plan for Rail, *"my rail service to be reliable, punctual and frequent so that I can have confidence and trust in the service"* is the most popular.

Recent travellers (including commuters) tend to consider a broader range of needs important, while leisure and **less recent rail passengers** are more focussed on **safety** and **value for money**.

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OVERALL SATISFACTION OF ALL TRAIN JOURNEYS VS OTHER FORMS OF PUBLIC TRANSPORT

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When considering **all** of the train journeys that they make, eight out of ten rail passengers say that they are satisfied with them.

Overall satisfaction with all journeys

	Very satisfied	Fairly satisfied	Neither satisfied not dissatisfied	Fairly dissatisfied	Very dissatisfied
Tram journeys	37% ⇧	45%	13% ↓	3%	1
Coach journeys	33%	48%	13%	4%	1%
Train/Rail journeys	31%	49%	11% ↓	6% ↑	3% ↑
London Underground Journeys	28% ↓	52%	13%	6%	1%
Bus Journeys	25% ↓	52% ↑	13%	7% ↑	2%

■ Very satisfied ■ Fairly satisfied ■ Neither satisfied not dissatisfied ■ Fairly dissatisfied ■ Very dissatisfied

⬆⬇ *Significantly higher / lower than 'Total' at 95% confidence level*

S1Q6. Overall, how satisfied were you with your….
Base: Bus (n=2822), Train (3979), London Underground (n=2185), Tram (n=765), Coach (924)

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SATISFACTION AT EACH JOURNEY STAGE ON LAST TRAIN JOURNEY

Generally between 70%-80% of passengers are satisfied with the various railway journey stages when considering their last train journey. Journey support and information is the lowest scoring with only one quarter of passengers "very satisfied" with this.

- **Recent travellers** are more satisfied overall than less recent travellers (considering 'very satisfied')

- **Commuters** are significantly less likely than other travellers to be 'very satisfied' with planning their train journey (35%), and are generally less likely to have selected 'very satisfied' across almost every journey stage

- Those who **experienced disruption** on their last journey are significantly more dissatisfied than those who didn't across the board

- Those with a **disability** are less satisfied overall than those without a disability

- Respondents who **travelled with children under five years old** on their last journey are less satisfied overall than those who didn't

Satisfaction at each journey stage

Journey stage	Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied
Purchasing the most appropriate ticket	40%	39%	13%	5%	3%
Planning your train journey	40%	41%	11%	5%	2%
Your journey to and arrival at the station	36%	42%	14%	5%	3%
Overall experience of making onward connections	31%	40%	20%	6%	3%
Overall station experience	31%	45%	14%	7%	3%
Overall onboard experience	31%	44%	14%	8%	3%
Journey support and information	25%	35%	30%	6%	3%

■ Very satisfied ■ Fairly satisfied ■ Neither satisfied not dissatisfied ■ Fairly dissatisfied ■ Very dissatisfied

S3Q1. Overall, how satisfied were you with your last train journey? Full answer options in notes.
Base: All current passengers (n=3979)

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Less recent travellers are significantly less satisfied with making connections and overall journey support and information scores

Satisfaction by recency of travel – top two box

Planning your train journey	Purchasing the most appropriate ticket	Your journey to and arrival at the station	Overall station experience	Overall onboard experience	Overall experience of making onward connections	Journey support and information
82% / 80%	80% / 78%	80% / 75%	77% / 73%	75% / 74%	74% ↑ / 67% ↓	65% ↑ / 52% ↓
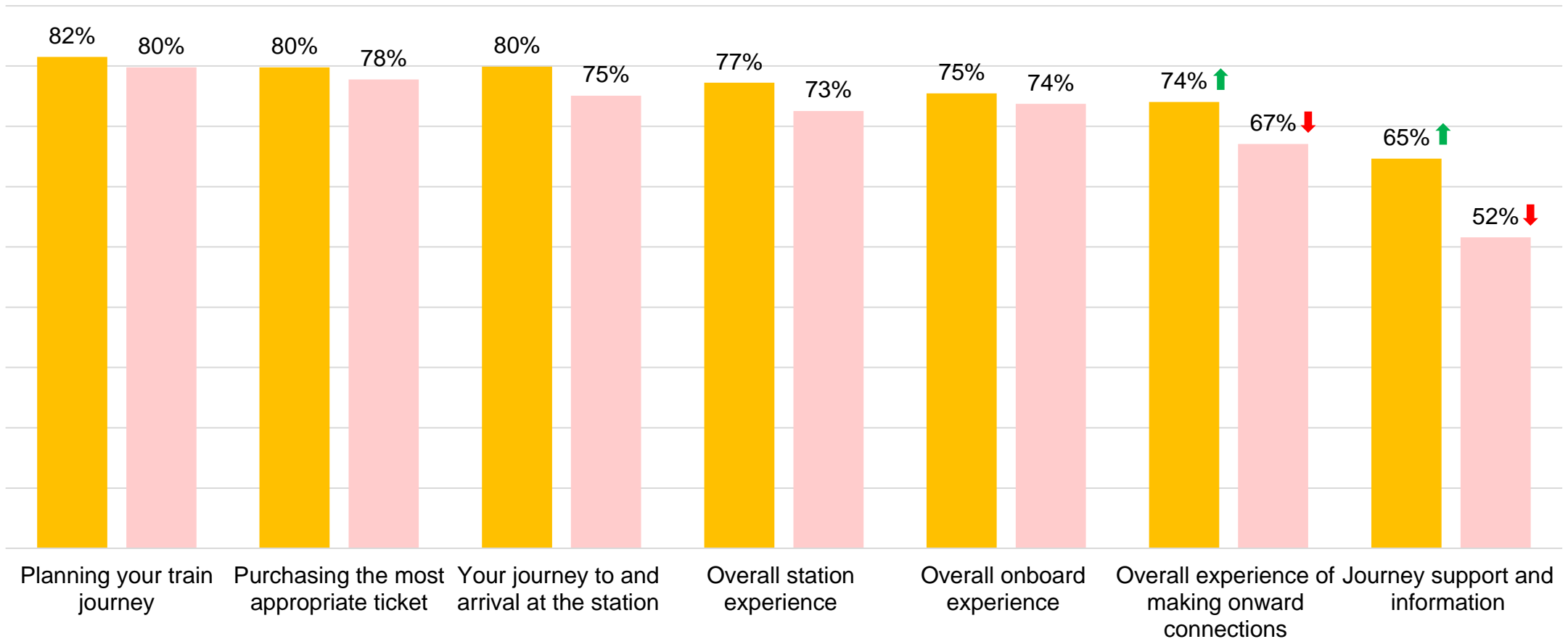
■ Recent   ■ Less recent

NB: Top two box = on a scale of 1-5, those who selected the top two satisfaction scores (e.g. 1 and 2) are shown.

S3Q1. Overall, how satisfied were you with your last train journey? Full answer options in notes.
Base: Recent travellers (n=2975), less recent travellers (n=1004)

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OVERALL, SATISFACTION LEVELS ARE SIMILAR ACROSS THE DIFFERENT JOURNEY PURPOSES – APART FROM JOURNEY SUPPORT AND INFORMATION WHICH IS LOWER FOR LEISURE PASSENGERS
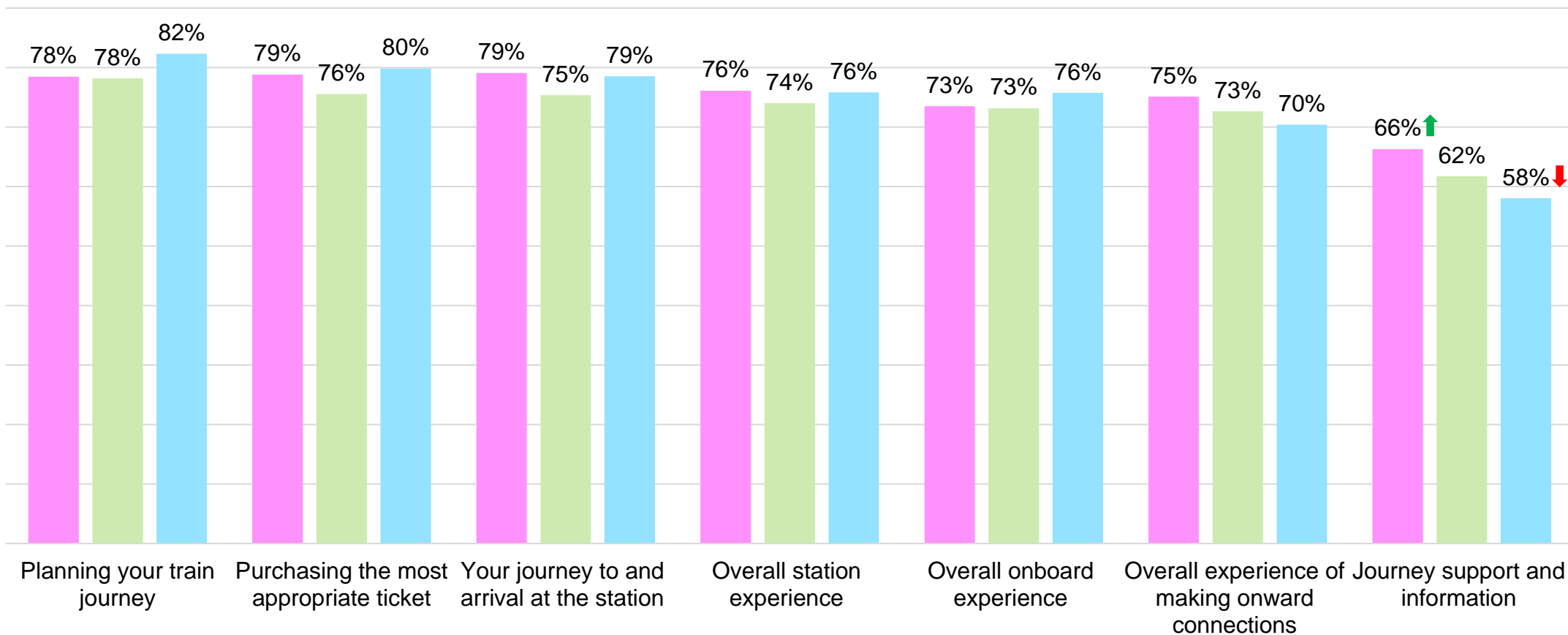
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Satisfaction by journey purpose - top two box

Chart: "Satisfaction by journey purpose - top two box"

Category	Commuting	Business	Leisure and personal business
Planning your train journey	78%	78%	82%
Purchasing the most appropriate ticket	79%	76%	80%
Your journey to and arrival at the station	79%	75%	79%
Overall station experience	76%	74%	76%
Overall onboard experience	73%	73%	76%
Overall experience of making onward connections	75%	73%	70%
Journey support and information	66% ↑	62%	58% ↓

Legend: Commuting / Business / Leisure and personal business

Significantly higher / lower than 'Total' at 95% confidence level ↑↓

NB: Top two box = on a scale of 1-5, those who selected the top two satisfaction scores (e.g. 1 and 2) are shown.

S3Q1. Overall, how satisfied were you with your last train journey? Full answer options in notes.
Base: Commuters (n=987), business travellers (n=453), leisure travellers (n=2539)

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Those who travelled with children under five years old on their last journey are less satisfied overall than those who didn't, except with the overall journey support and information.

Satisfaction by children and disability – top two box

Planning your train journey: 76%, 81%, 77%, 82%

Purchasing the most appropriate ticket: 80%, 79%, 76%, 80%

Your journey to and arrival at the station: 77%, 78%, ↓74%, ↑80%

Overall station experience: 74%, 76%, ↓67%, ↑78%

Overall onboard experience: 69%, 75%, ↓70%, ↑76%

Overall experience of making onward connections: 71%, 72%, ↓67%, ↑73%

Journey support and information: 67%, 60%, 56%, 61%

■ Travelled with children under five on their last train journey
■ Did not travel with children under five on their last train journey
■ Disability
■ No disability

NB: Top two box = on a scale of 1-5, those who selected the top two satisfaction scores (e.g. 1 and 2) are shown.

↑ ↓ *Significantly higher / lower than 'Total' at 95% confidence level*

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HOW STATED IMPORTANCE WAS MEASURED - MAXDIFF TRADE-OFF EXERCISES

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This study sought to understand the importance of potential railway initiatives on overall rail journey satisfaction. The first stage of this was to measure stated importance.

Stated importance

1 **Three 'trade-off' exercises** (Maximum Difference Scaling or MaxDiff): respondents saw screens with four randomly selected initiatives. They had to pick which is most important and which is least important to them. This exercise was repeated around a dozen times.

The resulting scores provided **a ranking of which of the initiatives** passengers say are important to them.

2 In addition, on each screen in the exercise, respondents were asked how many of the four initiatives would impact their overall satisfaction with their train journeys.

This provides an "**anchor**" which is an arbitrary line which differentiates between the initiatives that customers see as something which would impact their overall satisfaction and those which they say would not. This anchor changes depending on passenger type.

Please note that the findings from this first stage of work refer only to stated importance and not to derived importance which is used to measure the impact of the initiatives on overall satisfaction.

The next slide explains how derived importance was measured, and how to interpret this against stated importance.

NB: The initiatives were tested by groups of journey stages as there were too many to test in one exercise

Max Diff	The journey stages	Number of initiatives tested
A.	1. Planning your journey	9
	2. Purchasing your tickets	7
B.	3. Journey to, and arrival at station	3
	4. Overall station experience	11
	5. Onward connections	4
C.	6. Overall onboard experience	20
	7. Journey support and information	5
	Total	**59**

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Derived importance

Derived importance is what we have modelled as the impact of the initiatives on overall passenger satisfaction. This is an implicit measurement based on how passengers have rated their recent experience vs how they would rate their experience if an initiative was introduced.

Stated vs derived

Stated importance is what passengers have explicitly said are important initiatives, whilst derived importance is a modelled approach.

Structure of the following slides

The structure of the following slides which report the findings from each group of initiatives is as follows;

- A bar chart showing the stated importance of initiatives grouped by journey stages for the MaxDiff exercise, including the anchor.

- A table showing stated importance (including the anchor) of the grouped initiatives, cut by commuters, business travellers, leisure travellers, recent travellers and less recent travellers.

- A scattergraph which compares the stated importance of the initiatives to derived importance (separated into each journey stage).

How to interpret the scattergraphs – stated vs derived importance:

Increasing derived importance →

Enhancers
- Low stated / high derived importance
- Opportunities to demonstrate additional value and surpass expectations

Top priority
- High stated / high derived importance
- Greatest potential to positively impact overall satisfaction

Low priority
- Low stated / low derived importance
- Least potential to impact overall satisfaction

Hygiene factors
- High stated / low derived importance
- Failing to perform may result in losing passengers

Increasing stated importance →

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Passengers tell us that ticketing initiatives are most important to them.

All current passengers — Ranked High-Low importance

Initiative	%
A significantly simpler fare structure than the one that currently exists	14.77%
A simpler system for purchasing tickets (online or at a ticket machine) that helps you buy the best ticket for your journey	10.59%
Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	8.52%
Anchor	
One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	7.26%
Ability to tap in and out at stations using contactless cards to pay as you go	6.94%
View your train's real-time position on a live map via your device	6.45%
Ticket/ customer service staff present near ticket machines to give information and help with ticket purchases	6.13%
One central Great British Railway website/app that is integrated with other transport apps (e.g. bus and taxi apps) to help with journey planning	5.21%
Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/ delays, alternative routes)	4.95%
Real-time information delivered to your device on the day of travel about how busy the train is	4.73%
Ability to see how often specific trains are cancelled or delayed when booking a ticket	4.07%
Easily check if your ticket is valid for specific trains via the Great British Railway app/website	3.29%
One central Great British Railway website/app with up-to-date maps of inside the station (e.g. like Google streetview and a floorplan)	3.22%
Information on how busy a train is likely to be when booking a ticket	3.20%
Ability to book assistance for your journey when buying your ticket e.g. help getting on and off the train	3.00%

Legend:
- Planning a journey
- Purchasing the most appropriate ticket

Anchored MaxDiff

Share of Preference/Importance

Presented here is the share of importance of initiatives linked to planning a journey or purchasing a ticket (stated not derived).

In addition, those initiatives above the anchor are predicted to have an impact on overall satisfaction. However, this anchor will differ depending on passenger type – so in some instances, initiatives below the line (or combinations of initiatives) will also have a positive impact on overall passenger satisfaction.

S4Q1. Please select which potential improvements are the most important and least important to you when planning for your journey and purchasing your ticket.
Base: All current passengers (n=2674)

For Anchor. S4Q2. How many of these would impact your overall satisfaction with your train journeys if they were implemented?

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Further initiatives around a central app/website, tapping in and out, and viewing the train's real-time position are said to be important to commuters, business travellers and recent travellers.

● Overall process of planning your train journey

● Overall process of purchasing the most appropriate ticket for your journey

Shaded numbers indicate features which are above the anchor

Ranked High-Low importance for All passengers

Planning for your journey and purchasing your ticket		All	Commuters	Business	Leisure	Recent	Less recent
	A significantly **simpler fare structure** than the one that currently exists	**14.77%**	**11.09%**	**13.08%**	**16.40%**	**13.23%**	**18.04%**
	A **simpler system for purchasing tickets** (online or at a ticket machine) that helps you buy the best ticket for your journey	**10.59%**	**8.43%**	**9.91%**	**11.50%**	**9.84%**	**12.21%**
	Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	**8.52%**	**8.58%**	**8.04%**	**8.57%**	**8.89%**	7.73%
	One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	7.26%	6.79%	**7.04%**	7.47%	**7.02%**	7.77%
	Ability to **tap in and out** at stations using contactless cards to pay as you go	6.94%	**8.40%**	**7.63%**	6.29%	**7.56%**	5.63%
	View your **train's real-time position** on a live map via your device	6.45%	**7.60%**	**6.65%**	5.99%	**6.90%**	5.48%
	Ticket/customer service staff present near ticket machines to give information and help with ticket purchases	6.13%	5.37%	4.97%	6.59%	5.84%	6.75%
	One central Great British Railway **website/app that is integrated with other transport apps** (e.g. bus and taxi apps) to help with journey planning	5.21%	6.43%	5.70%	4.69%	5.64%	4.30%
	Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/delays, alternative routes)	4.95%	4.96%	6.12%	4.75%	5.13%	4.54%
	Real-time information delivered to your device on the day of travel about how busy the train is	4.73%	5.16%	5.06%	4.53%	5.15%	3.86%
	Ability to **see how often specific trains are cancelled or delayed when booking a ticket**	4.07%	4.59%	5.26%	3.69%	4.53%	3.10%
	Easily **check if your ticket is valid for specific trains** via the Great British Railway app/website	3.29%	4.00%	4.29%	2.87%	3.64%	2.55%
	One central Great British Railway **website/app with up-to-date maps of inside the station** (e.g. like Google streetview and a floorplan)	3.22%	4.29%	3.42%	2.80%	3.56%	2.52%
	Information on **how busy a train is likely to be** when booking a ticket	3.20%	3.71%	3.52%	2.95%	3.51%	2.51%
	Ability to **book assistance for your journey when buying your ticket** e.g. help getting on and off the train	3.00%	3.36%	3.11%	2.85%	3.03%	2.93%

Please see the Appendix for more detail on importance by passenger type.

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S4Q1. Please select which potential improvements are the **most important** and **least important** to you when planning for your journey and purchasing your ticket.
Base: All (n=2674), commuters (n=664), business (n=297), leisure (n=1713), recent (n=2016), less recent (n=658)

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Ticketing initiatives are important, but as hygiene factors – getting them right may not necessarily delight passengers but getting them wrong will frustrate them. However, being able to use one ticket across multiple forms of transport has true potential to positively impact overall satisfaction.
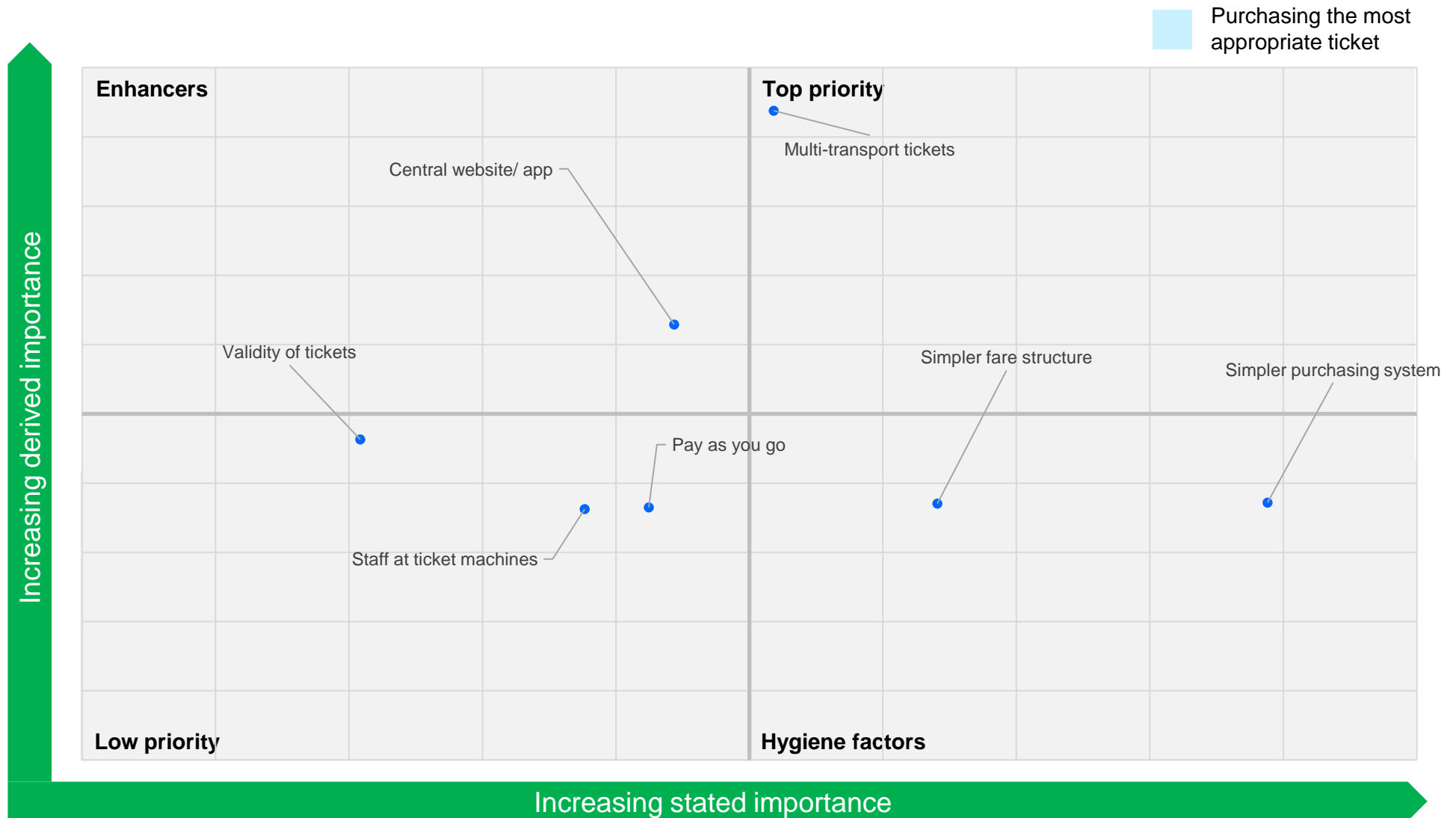
Purchasing the most appropriate ticket

Increasing derived importance

Enhancers

Top priority

Multi-transport tickets

Central website/ app

Validity of tickets

Simpler fare structure

Simpler purchasing system

Pay as you go

Staff at ticket machines

Low priority

Hygiene factors

Increasing stated importance

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The top priorities when it comes to journey planning are: providing passengers with real-time information via their device on the day of travel about how busy the train is; and being able to see the train's real-time position on a live map.

Planning a journey

Increasing derived importance

Enhancers

Top priority

● Real-time busyness of train

● Booking assistance

● See train on live map

Journey notifications

Likelihood of busy train

Station maps

Integrating transport apps

Cancelled/delayed trains information

Central website/ app

Low priority

Hygiene factors

Increasing stated importance

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Passengers say that consistent, timely and accurate travel information is most important to them.

All current passengers   Ranked High-Low importance

Initiative	Value
Consistent, timely and accurate travel information at stations (e.g. from staff, on app/device, on departure boards, etc.)	11.44%
Highly trained, helpful and well-informed staff - regardless of role - who are able to help all customers	9.42%

Anchor

Initiative	Value
Improved accessibility at stations for older and disabled people, those with pushchairs, luggage, etc.	6.81%
CCTV at every station	6.50%
High standard of facilities at large stations (e.g. waiting rooms, toilets, work spaces, shops, etc.)	5.78%
Free, reliable, high-speed Wi-Fi at all stations	5.33%
Personalised, real-time information via your device about onward travel at your destination station (e.g. train platform changes, bus timetables, etc.)	5.08%
Real-time information via your device for your journey to the station e.g. disruption alerts, car parking availability and accessibility options	4.93%
Real-time information on the platform about where to stand for your carriage/ seat number	4.85%
Easily understood signposting to facilities, exits and platform information when making connections	4.62%
Personalised, real-time information via your device to help with train connections (e.g. platform numbers)	4.42%
All stations well-maintained and cleaned to a high standard	4.21%
Removing ticket barriers from stations and using new technology instead which means that you don't have to tap or scan your ticket	3.63%
Good availability of parking close to stations, regardless of the time of day	3.57%
Well-maintained and comfortable waiting areas at stations when waiting for other transport (e.g. buses and taxis)	3.55%
Help points at every station which directly connect you to staff if you need information or emergency support at the push of a button	3.40%
Understanding and helpful staff checking tickets at platforms	3.26%
All stations to have exactly the same style and format of signposting, directions and displays	2.28%

Legend:
- Journey to and arrival at the station
- Overall station experience

Anchored MaxDiff

Share of Preference/Importance

Presented here is the share of importance of initiatives linked to planning a journey or purchasing a ticket (stated not derived).

In addition, those initiatives above the anchor are predicted to have an impact on overall satisfaction. However, this anchor will differ depending on passenger type – so in some instances, initiatives below the line (or combinations of initiatives) will also have a positive impact on overall passenger satisfaction.

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S4Q5. Now please select which potential improvements are the most important and least important to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey
Base: All current passengers (n=2642)

For Anchor. S4Q2. How many of these would impact your overall satisfaction with your train journeys if they were implemented?

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Business travellers say that a high standard of facilities, Wi-Fi and real-time information via their device for their journey to the station are important.

- ● Journey to and arrival at the station
- ● Overall station experience
- ● Overall experience of making onward connections

Shaded numbers indicate features which are above the anchor

Ranked High-Low importance for All passengers

	All	Commuters	Business	Leisure	Recent	Less recent
Consistent, timely and accurate travel information at stations (e.g. from staff, on app/ device, on departure boards, etc.)	**11.44%**	**10.25%**	**10.26%**	**12.06%**	**11.13%**	**12.07%**
Highly trained, helpful and well-informed staff - regardless of role - who are able to help all customers	**9.42%**	7.25%	**7.81%**	**10.47%**	**8.75%**	**10.79%**
Improved accessibility at stations for older and disabled people, those with pushchairs, luggage, etc.	6.81%	6.32%	**5.88%**	**7.14%**	**6.59%**	7.24%
CCTV at every station	6.50%	6.01%	4.55%	**7.00%**	6.22%	7.08%
High standard of facilities at large stations (e.g. waiting rooms, toilets, work spaces, shops, etc.)	5.78%	5.65%	**6.24%**	5.75%	5.83%	5.68%
Free, reliable, high-speed Wi-Fi at all stations	5.33%	5.89%	**6.77%**	4.89%	5.89%	4.19%
Personalised, real-time information via your device about onward travel at your destination station (e.g. train platform changes, bus timetables, etc.)	5.08%	5.69%	5.53%	4.79%	5.57%	4.08%
Real-time information via your device for your journey to the station e.g. disruption alerts, car parking availability and accessibility options	4.93%	5.35%	**6.07%**	4.59%	5.46%	3.85%
Real-time information on the platform about where to stand for your carriage/ seat number	4.85%	3.94%	5.48%	5.08%	4.80%	4.95%
Easily understood signposting to facilities, exits and platform information when making connections	4.62%	4.03%	4.16%	4.90%	4.25%	5.36%
Personalised, real-time information via your device to help with train connections (e.g. platform numbers)	4.42%	4.52%	4.74%	4.34%	4.75%	3.75%
All stations well-maintained and cleaned to a high standard	4.21%	4.48%	4.15%	4.12%	4.37%	3.87%
Removing ticket barriers from stations and using new technology instead which means that you don't have to tap or scan your ticket	3.63%	4.71%	4.49%	3.10%	3.99%	2.88%
Good availability of parking close to stations, regardless of the time of day	3.57%	3.60%	4.52%	3.41%	3.22%	4.31%
Well-maintained and comfortable waiting areas at stations when waiting for other transport (e.g. buses and taxis)	3.55%	3.94%	4.22%	3.30%	3.69%	3.27%
Help points at every station which directly connect you to staff if you need information or emergency support at the push of a button	3.40%	3.70%	3.96%	3.20%	3.44%	3.32%
Understanding and helpful staff checking tickets at platforms	3.26%	3.12%	2.95%	3.37%	3.22%	3.35%
All stations to have exactly the same style and format of signposting, directions and displays	2.28%	2.85%	2.56%	2.03%	2.46%	1.92%

Please see the Appendix for more detail on importance by passenger type.

S4Q5. Now please select which potential improvements are the **most important** and **least important** to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey.
Base: All (n=2642), commuters (n=640), business (n=304), leisure (n=1698), recent (n=1966), less recent (n=676)

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OVERALL STATION EXPERIENCE – DERIVED IMPORTANCE

quadrangle

Consistent, timely and accurate travel information at stations is a top priority for driving satisfaction. However, highly trained, helpful and well-informed staff, whilst important, is a hygiene factor – getting this wrong may cause passengers to stop making train journeys.

Overall station experience

Increasing derived importance

Enhancers

Top priority

Travel information at stations

Ticket checking staff at stations

Standard of facilities

CCTV at stations

Wi-Fi at stations

Station accessibility

Helpful staff at stations

Consistent signage at stations

Help points at stations

Where to stand on platform

Clean stations

Low priority

Hygiene factors

Increasing stated importance

YOUR JOURNEY TO AND ARRIVAL AT THE STATION – DERIVED IMPORTANCE

Providing real-time information via devices for journeys to the station presents an opportunity to positively impact overall satisfaction. Providing good availability of parking close to stations, regardless of the time of day, has the potential to delight passengers.

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quadrangle

Journey to and arrival at the station

Enhancers

Top priority

Parking

Journey to station information

Wi-Fi at stations

Low priority

Hygiene factors

Increasing derived importance

Increasing stated importance

transportfocus

quadrangle

The top priorities when it comes to making onwards connections are providing personalised, real-time information via devices about onward travel at destination stations and easily understood signposting to facilities, exits and platform information when making connections.

Onward connections
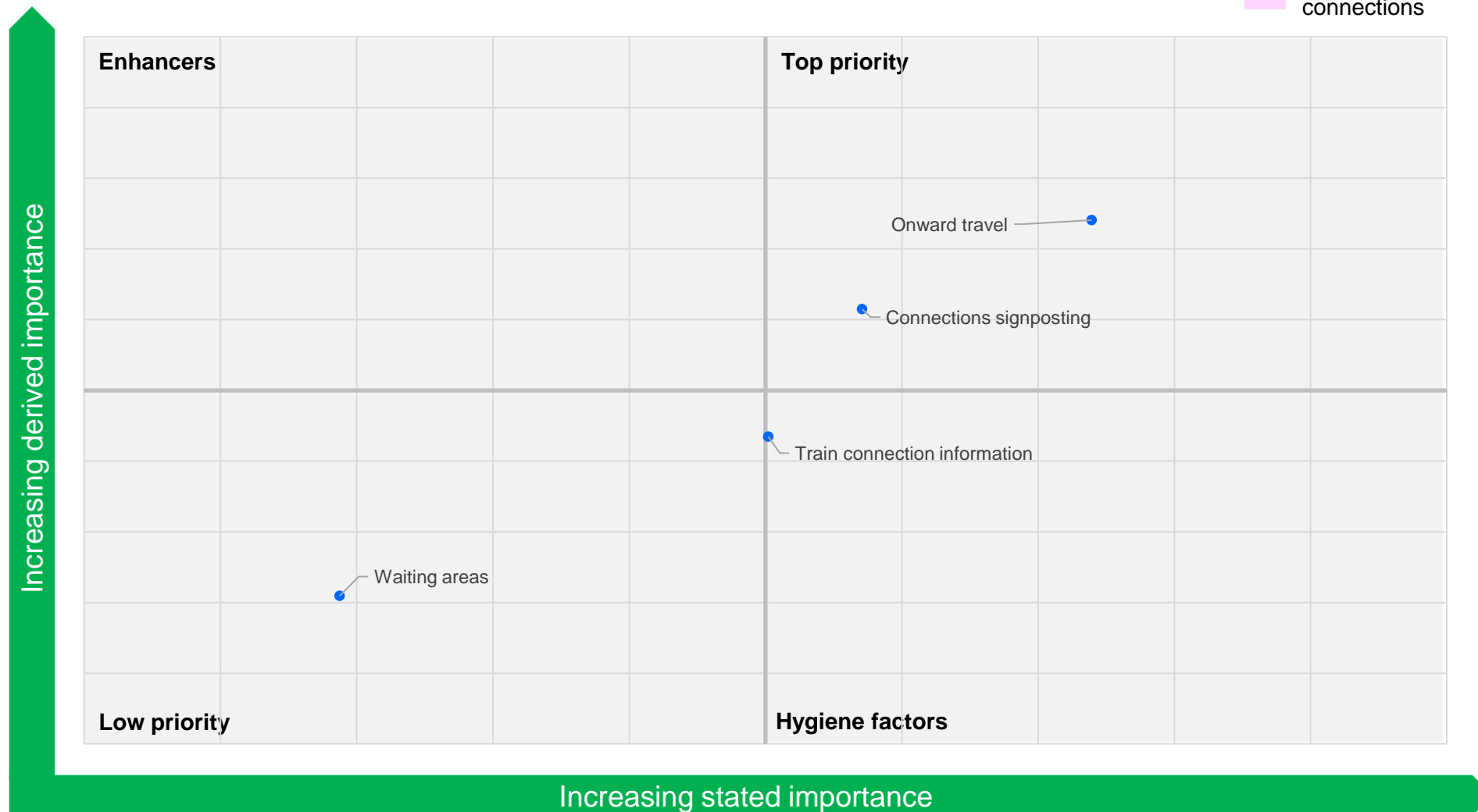
Increasing derived importance

Enhancers

Top priority

Onward travel

Connections signposting

Train connection information

Waiting areas

Low priority

Hygiene factors

Increasing stated importance

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ONBOARD EXPERIENCE & PROVISION OF JOURNEY SUPPORT/ INFORMATION INITIATIVES – STATED IMPORTANCE

quadrangle

Comfortable, well-maintained trains with CCTV are said to be important to passengers, as well as guaranteeing tickets are valid on other services when travel is disrupted.

All current passengers   Ranked High-Low importance

Initiative	Value
Trains that are comfortable to travel on (e.g. plenty of seating around tables, cool in summer and…	10.41%
A guarantee that your ticket will be valid on other services when your travel is disrupted	9.09%
All trains well-maintained and cleaned to a high standard	6.42%
CCTV on every train	5.94%

Anchor

Initiative	Value
Free, reliable, high-speed Wi-Fi on all trains	5.52%
Helpful and well-informed staff on trains who can provide help to all customers	4.99%
If your train is delayed by more than 15 minutes, access a link in-app, via email or text message to a…	4.86%
Improved accessibility on trains for older and disabled people, those with pushchairs, luggage, etc.	4.82%
Clean and well-stocked toilets on trains	4.55%
Clear, easy to hear and relevant on-train announcements	3.89%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on longer distance journeys	3.18%
Consistently reliable mobile phone signal on all trains, including in tunnels	3.12%
Understanding and helpful staff checking tickets on trains	2.91%
Help points on all trains which directly connect you to staff if you need information or emergency…	2.78%
Real-time information via your device about on-board facilities in relation to wherever you are on the…	2.68%
Free item such as a hot drink when train is late/cancelled in addition to the right to compensation	2.29%
One national customer service department for all complaints, queries, finding lost property, delay…	2.28%
Widespread access to device charging on all trains	2.22%
Plenty of space for luggage and pushchairs on trains	2.21%
Plenty of space for wheelchair users on trains	2.06%
A QR code on the back of every seat, providing real-time information for the train you are on and…	1.85%
Improved quality and consistent style of signposting/ information on trains about onboard facilities	1.72%
Ability to order food and drink to your seat on longer distance journeys	1.53%
Broader range of food and drink (including to suit different dietary requirements) on longer distance…	1.39%
Optional in-app, email or text notifications which ask for feedback and provide support after you have…	1.36%

Overall onboard experience

Journey support and information

Anchored MaxDiff

Share of Preference/Importance

Presented here is the share of importance of initiatives linked to planning a journey or purchasing a ticket (stated not derived).

In addition, those initiatives above the anchor are predicted to have an impact on overall satisfaction. However, this anchor will differ depending on passenger type – so in some instances, initiatives below the line (or combinations of initiatives) will also have a positive impact on overall passenger satisfaction.

S4Q10. Finally, please again select which potential improvements are the most important and least important to you when thinking about your overall onboard experience and the provision of journey support/ information.
Base: All current passengers (n=2642)

For Anchor. S4Q2. How many of these would impact your overall satisfaction with your train journeys if they were implemented?

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ONBOARD EXPERIENCE & PROVISION OF JOURNEY SUPPORT/ INFORMATION INITIATIVES – STATED IMPORTANCE BY JOURNEY PURPOSE AND RECENCY OF TRAVEL

Every type of passenger says that comfortable trains are most important to them.

quadrangle

Shaded numbers indicate features which are above the anchor

● Overall onboard experience   ● Journey support and information

Ranked High-Low importance for All passengers

	All	Commuters	Business	Leisure	Recent	Less recent
Trains that are comfortable to travel on (e.g. plenty of seating around tables, cool in summer and warm in winter, etc.)	10.41%	7.81%	10.80%	11.32%	9.57%	12.13%
A guarantee that your ticket will be valid on other services when your travel is disrupted	9.09%	6.54%	7.56%	10.31%	8.37%	10.56%
All trains well-maintained and cleaned to a high standard	6.42%	5.41%	5.91%	6.89%	5.88%	7.52%
CCTV on every train	5.94%	4.94%	4.81%	6.51%	5.46%	6.92%
Free, reliable, high-speed Wi-Fi on all trains	5.52%	5.80%	8.11%	4.98%	5.67%	5.22%
Helpful and well-informed staff on trains who can provide help to all customers	4.99%	3.95%	4.43%	5.47%	4.50%	5.97%
If your train is delayed by more than 15 minutes, access a link in-app, via email or text message to a pre-filled compensation form	4.86%	6.19%	4.61%	4.41%	5.34%	3.90%
Improved accessibility on trains for older and disabled people, those with pushchairs, luggage, etc.	4.82%	4.63%	4.35%	4.97%	4.70%	5.07%
Clean and well-stocked toilets on trains	4.55%	4.13%	3.95%	4.80%	4.36%	4.92%
Clear, easy to hear and relevant on-train announcements	3.89%	3.25%	3.84%	4.14%	3.71%	4.26%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on longer distance journeys	3.18%	3.26%	3.68%	3.06%	3.32%	2.88%
Consistently reliable mobile phone signal on all trains, including in tunnels	3.12%	4.09%	3.57%	2.68%	3.56%	2.23%
Understanding and helpful staff checking tickets on trains	2.91%	2.74%	2.76%	3.00%	2.76%	3.22%
Help points on all trains which directly connect you to staff if you need information or emergency support at the push of a button	2.78%	3.26%	3.26%	2.51%	2.89%	2.55%
Real-time information via your device about on-board facilities in relation to wherever you are on the train (e.g. toilets, catering facilities, location of staff)	2.68%	3.96%	2.68%	2.19%	3.12%	1.78%
Free item such as a hot drink when train is late/cancelled in addition to the right to compensation	2.29%	2.92%	1.95%	2.11%	2.59%	1.69%
One national customer service department for all complaints, queries, finding lost property, delay compensation, etc.	2.28%	3.10%	2.68%	1.90%	2.59%	1.63%
Widespread access to device charging on all trains	2.22%	2.71%	2.62%	1.96%	2.52%	1.60%
Plenty of space for luggage and pushchairs on trains	2.21%	2.02%	1.78%	2.35%	2.21%	2.20%
Plenty of space for wheelchair users on trains	2.06%	1.95%	2.31%	2.06%	2.07%	2.04%
A QR code on the back of every seat, providing real-time information for the train you are on and advice during disruption	1.85%	2.87%	1.89%	1.46%	2.21%	1.13%
Improved quality and consistent style of signposting/ information on trains about onboard facilities	1.72%	2.07%	2.29%	1.49%	1.90%	1.35%
Ability to order food and drink to your seat on longer distance journeys	1.53%	1.85%	1.70%	1.38%	1.73%	1.12%
Broader range of food and drink (including to suit different dietary requirements) on longer distance journeys	1.39%	1.85%	1.65%	1.17%	1.64%	0.87%
Optional in-app, email or text notifications which ask for feedback and provide support after you have travelled (e.g. for complaints, delay compensation, etc.)	1.36%	2.00%	1.87%	1.04%	1.60%	0.88%

S4Q10. Finally, please again select which potential improvements are the **most important** and **least important** to you when thinking about your <u>overall onboard experience and the provision of journey support/ information.</u>
Base: All (n=2642), commuters (n=670), business (n=305), leisure (n=1667), recent (n=1968), less recent (n=674)

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quadrangle

The comfortable trains initiatives has high stated importance but is a hygiene factor – it is the bare minimum expected by customers. Accessibility on trains, good Wi-Fi, and clean, well-stocked train toilets are the top priorities for improving overall satisfaction with rail journeys.

Overall onboard experience

Increasing derived importance

Enhancers

Top priority

● Accessibility on trains

Phone signal on trains

Luggage space ●

● Wi-Fi on trains

Ordering food/drink
Specialised seating zones
Train toilets ● | Helpful staff on trains

● ●

● Clean trains

On-board facilities information ●

Comfortable trains ●

Space for wheelchair users ●

Help points on trains

● CCTV on trains

QR code ● Device charging on trains

Train catering options ● ● ●

● On-train announcements

Consistent signage on trains — Ticket checking staff on trains

Low priority

Hygiene factors

Increasing stated importance

quadrangle

Guaranteeing tickets are valid on other services when travel is disrupted is a key initiative for increasing overall satisfaction. Other initiatives at this journey stage are mainly lower priority.

Journey support and information

Increasing derived importance

Enhancers

Top priority

Validity of tickets when disruption

Free item if disruption

Pre-filled compensation form

Post-journey notifications

National customer service

Low priority

Hygiene factors

Increasing stated importance

transport**focus**

quadrangle
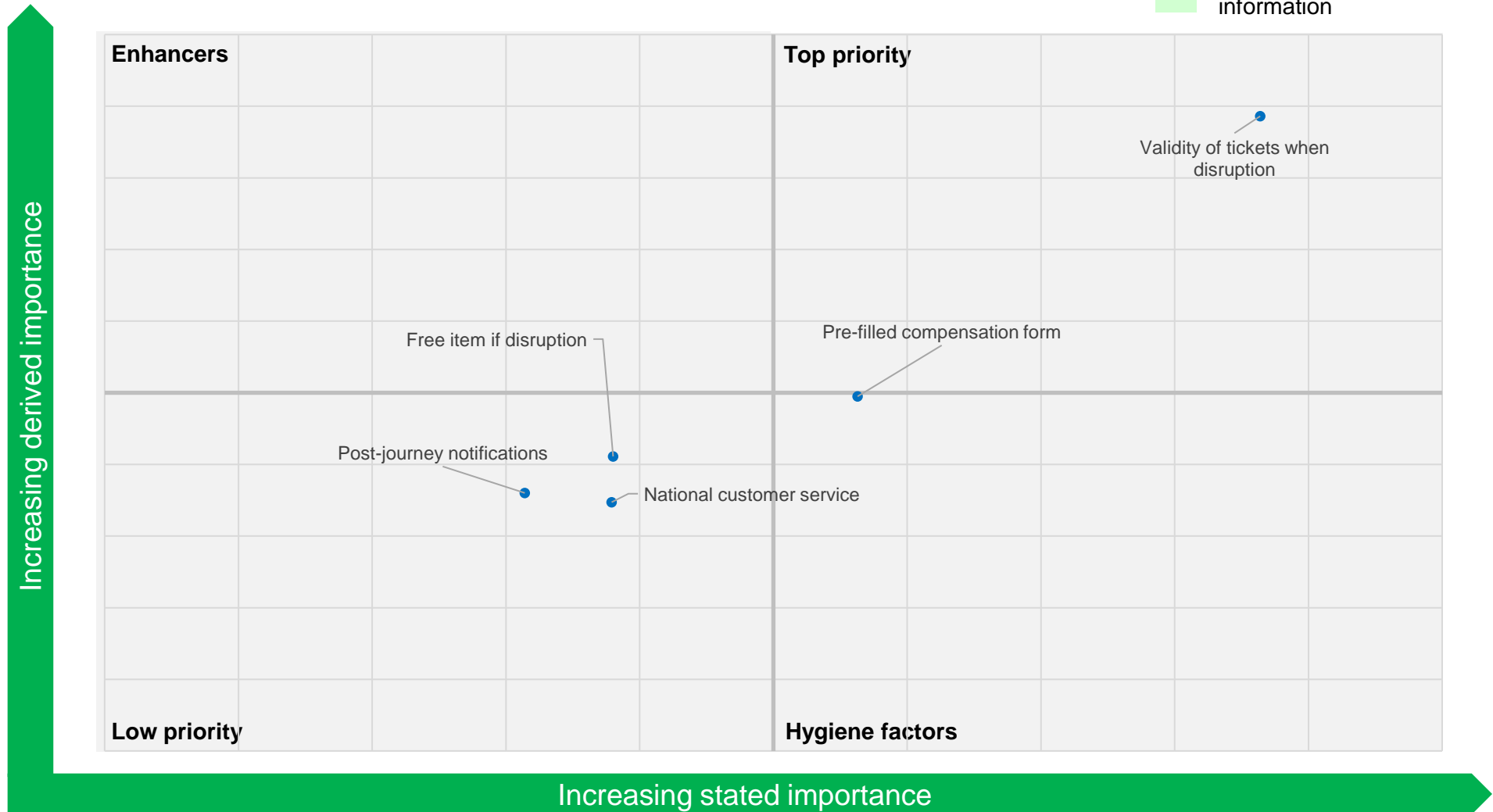
Additional questions in this study sought to understand whether travelling on electric trains and making journeys without having to change trains would satisfy passengers. However, the method of testing these ideas differed to the testing of the other initiatives.

These two ideas sit outside specific journey stages (e.g. overall station experience, overall onboard experience, etc.) and are slightly more abstract than the more practical initiatives tested within this study, which is why they were asked about separately.

Electric trains

Respondents were asked a series of questions to understand:

- Whether they were aware of the type of trains they currently travel on (diesel, electric, both)

- Thinking about the journeys they make by diesel trains, what impact would it have on their overall satisfaction if the train for that journey was electric instead of diesel

- If it would increase their satisfaction, why?

Making journeys without having to change trains

Respondents were asked another series of questions to understand:

- If they ever make journeys where they have to change trains

- Thinking about the journeys where they have to change trains, what impact would it have on their overall satisfaction if they could reach their destination without having to change trains

- They were given the following additional information: *A final potential improvement to train journeys is the possibility of making your journey without having to change trains. However, this could increase your overall journey time.*

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THE MAJORITY WHO CURRENTLY USE DIESEL TRAINS REPORTED THAT THEIR SATISFACTION WOULD INCREASE IF THEIR TRAIN WAS ELECTRIC, BUT OVER TWO-FIFTHS SAID IT WOULD HAVE NO IMPACT

quadrangle

Electric trains being more environmentally friendly than diesel trains is the main reason why respondents say their satisfaction would increase.

Thinking about the journeys you make by diesel trains, what impact would it have on your overall satisfaction if the train for that journey was electric instead of diesel?

Top two box increase:
66% commuters ⬆
61% business travellers ⬆
41% leisure travellers ⬇

58% recent travellers ⬆
40% less recent travellers ⬇

18-44 years old: 66% ⬆
45+ years old: 39% ⬇

| 19% | 34% | 44% | 2% | |

■ Significantly increase   ■ Increase   ■ Neither   ■ Decrease   ■ Significantly decrease
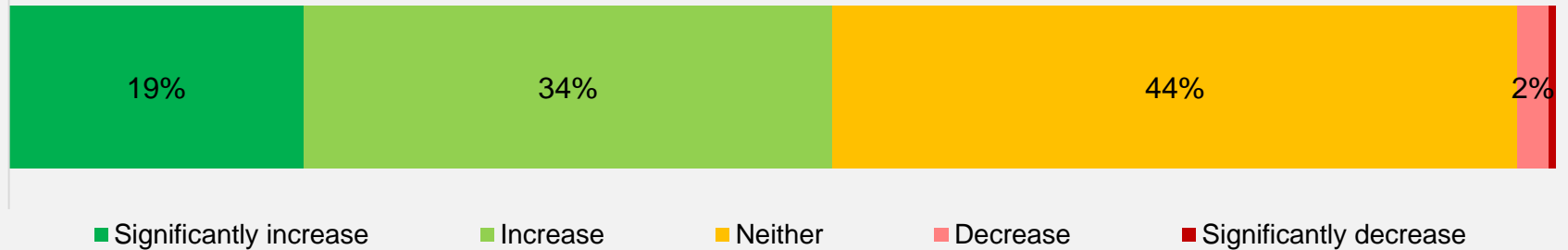
⬆⬇ *Significantly higher / lower than 'Total' at 95% confidence level*

What type of train do you ever travel on?

17% Electric only
7% Diesel only
43% Both
33% Don't know
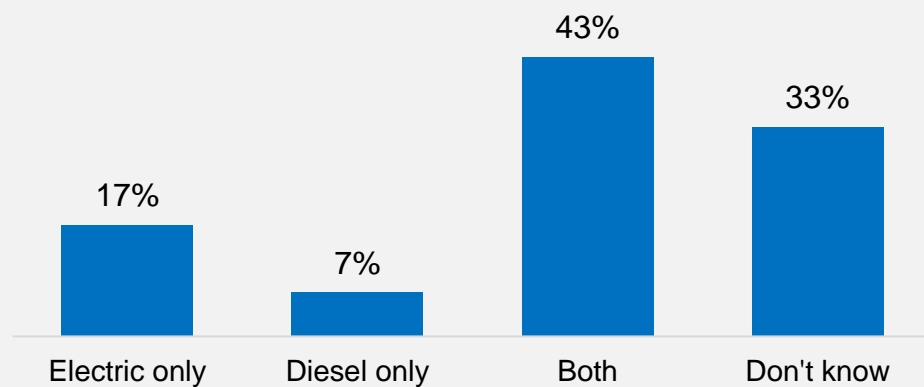
Why would your satisfaction increase if your train was electric instead of diesel in the future?

More environmentally friendly (75%)
Smoother (54%)
Quieter (47%)
Reduce journey times (16%)

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Recent travellers would be more satisfied than those who have travelled six to twelve months ago.

A final potential improvement to train journeys is the possibility of making your journey without having to change trains. However, this could increase your overall journey time.
Thinking about the journeys you make where you have to change trains, what impact would it have on your overall satisfaction if you could reach your destination without having to change trains?

70% of respondents say that they sometimes make journeys where they have to change trains to reach their end destination.

⬆ 39% recent travellers
⬇ 32% less recent travellers

⬇ 27% recent travellers
⬆ 36% less recent travellers

| 28% | 37% | 30% | 5% | |

■ Significantly increase   ■ Increase   ■ Neither   ■ Decrease   ■ Significantly decrease

⬆⬇ *Significantly higher / lower than 'Total' at 95% confidence level*

S4Q17. Do you ever make journeys where you have to change trains to reach your end destination? *Base: 3979*
S4Q18. A final potential improvement to train journeys is the possibility of making your journey without having to change trains. However, this could increase your overall journey time. Thinking about the journeys you make where you have to change trains, what impact would it have on your overall satisfaction if you could reach your destination without having to change trains? *Base: 2820*

ONE FIFTH OF PASSENGERS SAY THAT THEY EXPERIENCED DISRUPTION ON THEIR LAST TRAIN JOURNEY, WITH THE MAJORITY REPORTING THAT THEIR DISRUPTION LASTED FOR LESS THAN 30 MINUTES

7-in-10 passengers say they would have been satisfied if their train was running on time. Passengers who experienced longer disruptions are more likely to say that they would be dissatisfied.

21% of respondents say that they experienced disruption on their last train journey.

Perceived length of disruption

Less than 10 minutes	11%
11 to 20 minutes	21%
21 to 30 minutes	20%
31 to 40 minutes	14%
41 to 50 minutes	7%
51 minute to one hour	6%
More than one hour	8%
The train was cancelled/ terminated early	13%

Impact on satisfaction

	Total	Short disruption (<10 minutes)	Medium disruption (10-30 minutes)	Long disruption (40+ minutes)
Very satisfied	32%	26%	31%	32%
Fairly satisfied	39%	53%	41%	35%
Neither	13%	17%	12%	14%
Fairly dissatisfied	9%	2%	10%	10%
Very dissatisfied	7%	3%	6%	8%

■ Very dissatisfied   ■ Fairly dissatisfied   ■ Neither
■ Fairly satisfied   ■ Very satisfied

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S5Q5. Thinking about your last train journey, did you experience any disruption? *Base: n=3918*
S5Q6. You just told us that you experienced disruption on your last train journey. How long was your train delayed because of this? *Base: n=825*
S5Q6a. You just told us that you experienced disruption on your last train journey. Thinking about that journey again, if the train had been running on time, what satisfaction rating would you give your journey? *Base: n=825)*

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We asked rail passengers to rank the importance of the nine needs of a modern passenger experience as set out in *The Plan for Rail.*

quadrangle

Alongside understanding the importance of different initiatives, this study also sought to understand the relative importance of nine passengers needs as set out in The Plan for Rail.

The Plan for Rail identified that:

The public want reliable, punctual services that represent good value for money. They expect clear and proactive information and simple, fair, transparent pricing. Customers with both visible and invisible disabilities and other additional needs must feel welcomed, comfortable and valued when using the rail network, as our nine passenger needs set out.

The nine needs have been included in this study to provide insight into how they are viewed by passengers, as well as to give a higher-level strategic view, above that of the more tactical initiatives tested.

Respondents were asked to look at the list of needs and place them in rank order - from most important to least important - for them personally. The results align with the "Britain's railway – what matters to passengers" study referenced at the beginning of this document, where the following things were identified as most important to passengers:

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

Safe	Accessible	Seamless
I need to **be safe**, and **feel safe**.	I need to be able to **access the network as easily as possible** and find rail an inclusive service for my needs.	I need a **consistent experience** across the rail network, and to easily understand the different products on offer.
Connected	**Reliable**	**Comfortable**
I need to **be able to get to and from rail easily**, using a range of transport services from my front door to my destination.	I need my rail service to be **reliable, punctual and frequent** so that I can have confidence and trust in the service.	I need my journey to be **pleasant and comfortable**, with products and services that meet my needs.
Informed	**Affordable**	**Trusted**
I need to have **easy access to relevant, accurate and personalised information** before, during and after my journey, especially during disruption.	I need to **feel that my ticket offers value for money**. I judge this based on journey experience, transparent purchasing and cost.	I need to **trust that my needs will be met** and know who is in charge of making sure they are. If things go wrong, I need to know whom to turn to and that they will treat me fairly.

The nine passenger needs identified in the Plan for Rail.

A RELIABLE, PUNCTUAL AND FREQUENT SERVICE RANKS HIGHEST OF PASSENGER NEEDS ACROSS ALL PASSENGER TYPES

quadrangle

Safety and value for money are also of high priority –
especially for leisure and less recent travellers

Mean scores where 1 = Top ranked 9 = Bottom ranked

Rank	Nine needs – mean score	All	Commut-ers	Business	Leisure	Recent	Less recent
1	I need **my rail service to be reliable, punctual and frequent** so that I can have confidence and trust in the service	3.7	3.9	3.9	3.6	3.8	3.4
2	I need **to be safe and feel safe**	4.2	4.5	4.5	4	4.4	3.8
3	I need to feel that **my ticket offers value for money**. I judge this based on journey experience, ticket purchasing and cost	4.4	4.8	4.8	4.2	4.6	4.2
4	I need **my journey to be pleasant and comfortable**, with products and services (e.g. catering, facilities, etc) that meet my needs	4.9	5	4.8	4.8	4.9	4.8
5	I need **a seamless, consistent experience** across the rail network, and to easily understand the different products (e.g. tickets, services, etc) on offer	5.1	5	5	5.1	5	5.2
6	I need **to trust that my needs will be met** and know who is in charge of making sure they are. If things go wrong, I need to know **whom to turn to and that they will treat me fairly**	5.6	5.4	5.3	5.7	5.5	5.8
7	I need **to have easy access to relevant, accurate and personalised information** before, during and after my journey, especially during disruption	5.6	5.4	5.5	5.7	5.5	5.9
8	I need to be able **to get to and from stations easily**, using a range of transport services from my front door to my destination	5.7	5.4	5.6	5.9	5.5	6.1
9	I need to be able to **access trains and stations as easily as possible** and find rail an inclusive service for my needs	5.9	5.5	5.6	6	5.8	6

S4Q19. Looking at the following list of needs that rail passengers in general might have, please place these in rank order - from most important to least important - for you personally.
Base: Total (n=3979), commute (n=987), business (n=453), leisure (n=2539), recent (n=2975), less recent (n=-1004)

AROUND HALF OF PASSENGERS EITHER RANKED 'A RELIABLE, PUNCTUAL AND FREQUENT SERVICE' OR 'A SAFE SERVICE' AS THEIR TOP NEED FROM THE RAILWAY, WITH VALUE FOR MONEY COMING IN NEXT

quadrangle

	1	2	3	4	5	6	7	8	9
Reliable, punctual and frequent	25%	18%	13%	10%	8%	7%	7%	6%	5%
Be safe and feel safe	23%	13%	12%	10%	8%	9%	7%	7%	9%
Value for money	14%	16%	14%	11%	11%	9%	9%	8%	9%
Pleasant and comfortable journey	8%	12%	14%	15%	12%	11%	10%	9%	9%
Seamless and consistent experience across rail network	8%	10%	11%	13%	13%	13%	11%	11%	9%
Trust that my needs will be met and know who is in charge of making sure they are	6%	8%	9%	11%	12%	14%	14%	13%	13%
Get to and from stations easily using a range of transport services	6%	8%	9%	10%	11%	12%	12%	15%	17%
Relevant, accurate and personalised info before, during and after journey, especially during disruption	5%	7%	10%	11%	12%	13%	14%	14%	13%
Access trains/ stations easily and find rail an inclusive service for my needs	5%	8%	7%	9%	11%	12%	14%	17%	16%

Legend: ■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9

S4Q19. Looking at the following list of needs that rail passengers in general might have, please place these in rank order - from most important to least important - for you personally.
Base: Total (n=3979), commute (n=987), business (n=453), leisure (n=2539), recent (n=2975), less recent (n=-1004)

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A RELIABLE, PUNCTUAL AND FREQUENT SERVICE, AND VALUE FOR MONEY ARE MORE IMPORTANT TO LEISURE PASSENGERS AND OLDER CUSTOMERS

quadrangle

Women, less recent travellers and leisure passengers are more likely than men to prioritise safety.

Nine needs (combined first and second ranking of needs)

Reliable, punctual and frequent annotations:
- 54% 55+ years old ↑
- 36% 18-44 years old ↓
- 38% children ↓
- 47% no children ↑

Bars: 43%, 39%, 41%, 45%, 42%, 47%

Safe annotations:
- 32% men ↓
- 41% women ↑

Bars: 36%, 32%, 32%, 38%, 34%, 41%

Value for money annotations:
- 25% 18-44 years old ↓
- 35% 65+ ↑
- 39% living in Yorkshire ↑
- 24% living in London ↓
- 26% children ↓
- 32% no children ↑

Bars: 30%, 25%, 26%, 32%, 28%, 33%

Pleasant and comfortable journey:
Bars: 19%, 18%, 22%, 19%, 19%, 20%

Legend: ■ Total ■ Commute ■ Business ■ Leisure ■ Recent ■ Less recent

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

S4Q19_TOP 3. Looking at the following list of needs that rail passengers in general might have, please place these in rank order - from most important to least important - for you personally.
Base: Total (n=3979), commute (n=987), business (n=453), leisure (n=2539), recent (n=2975), less recent (n=-1004)

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LEISURE PASSENGERS ARE SIGNIFICANTLY LESS LIKELY TO RANK 'TRUST MY NEEDS WILL BE MET', 'RELEVANT, ACCURATE AND PERSONALISED INFORMATION' AND 'ACCESS TRAINS AND STATIONS EASILY' AS IMPORTANT

quadrangle

Commuters are significantly more likely to rank an 'inclusive service' in their top two needs.

Nine needs (combined first and second ranking of needs)

Seamless, consistent experience
- Total: 18%
- Commute: 18%
- Business: 20%
- Leisure: 17%
- Recent: 19%
- Less recent: 16%

Get to and from stations easily
18% living in London ↑
- Total: 14%
- Commute: 17%
- Business: 13%
- Leisure: 13%
- Recent: 15% ↑
- Less recent: 11% ↓
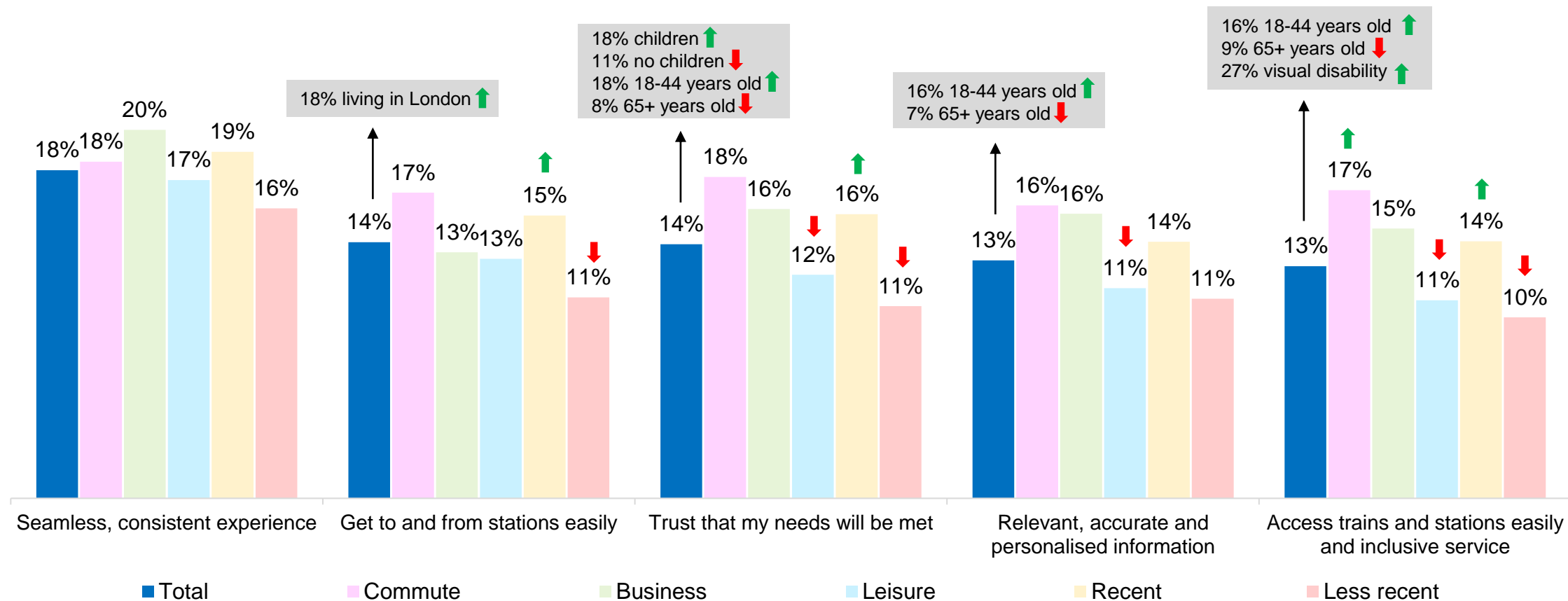
Trust that my needs will be met
18% children ↑
11% no children ↓
18% 18-44 years old ↑
8% 65+ years old ↓
- Total: 14%
- Commute: 18%
- Business: 16%
- Leisure: 12% ↓
- Recent: 16%
- Less recent: 11% ↓

Relevant, accurate and personalised information
16% 18-44 years old ↑
7% 65+ years old ↓
- Total: 13%
- Commute: 16%
- Business: 16%
- Leisure: 11% ↓
- Recent: 14%
- Less recent: 11%

Access trains and stations easily and inclusive service
16% 18-44 years old ↑
9% 65+ years old ↓
27% visual disability ↑
- Total: 13%
- Commute: 17% ↑
- Business: 15%
- Leisure: 11% ↓
- Recent: 14%
- Less recent: 10% ↓

Legend:
- ■ Total
- ■ Commute
- ■ Business
- ■ Leisure
- ■ Recent
- ■ Less recent

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

S4Q19_TOP 3. Looking at the following list of needs that rail passengers in general might have, please place these in rank order - from most important to least important - for you personally.
Base: Total (n=3979), commute (n=987), business (n=453), leisure (n=2539), recent (n=2975), less recent (n=-1004)

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- Overall satisfaction and satisfaction at each journey stage is relatively high among train passengers – around eight-in-ten are satisfied.

- Interventions related to the onboard experience have the greatest impact on overall satisfaction, especially among leisure passengers.

- Less recent travellers (including leisure passengers) have a narrower set of features or needs that are important to them – it is primarily about getting the basics right – reliability, comfort, safety and value for money.

- Of the 59 initiatives tested, several are top priorities and have the potential to positively impact overall satisfaction. These largely include the provision of information across the different journey points to make passengers' lives easier and their journey smoother.

- For example, optional updates via devices with journey information, real-time information about busyness and crowding, information about journeys to stations, seeing the train on a live map, onward travel information, ensuring tickets are valid for alternative routes when there is disruption, etc.

- Things like CCTV, accessibility and Wi-Fi also emerge as top priorities for driving satisfaction.

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Research. For decision makers.

1. **IN DEPTH TRAVELLER PROFILES:**

   - COMMUTERS

   - BUSINESS TRAVELLERS

   - LEISURE AND PERSONAL BUSINESS TRAVELLERS

   - RECENT TRAVELLERS

   - LESS RECENT TRAVELLERS

2. **STATED IMPORTANCE MAXDIFF CHARTS BY PASSENGER TYPE**

   - COMMUTERS

   - BUSINESS TRAVELLERS

   - LEISURE AND PERSONAL BUSINESS TRAVELLERS

   - RECENT TRAVELLERS

   - LESS RECENT TRAVELLERS

quadrangle

COMMUTERS

Age

Age	%
18-24	12%
25-34	29%
35-44	30%
45-54	18%
55-64	10%
65+	1%

Male 50%
Female 50%

Disability 15%
No disability 83%

Children 52%
No children 47%

Category	%
Long Distance	13
London South East	61
Regional	20
Open access	1

Socio-economic group

Group	%
A	9%
B	21%
C1	27%
C2	24%
D	16%
E	3%

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Base: 987

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BUSINESS

Age

11% 30% 24% 16% 14% 5%

18-24 25-34 35-44 45-54 55-64 65+
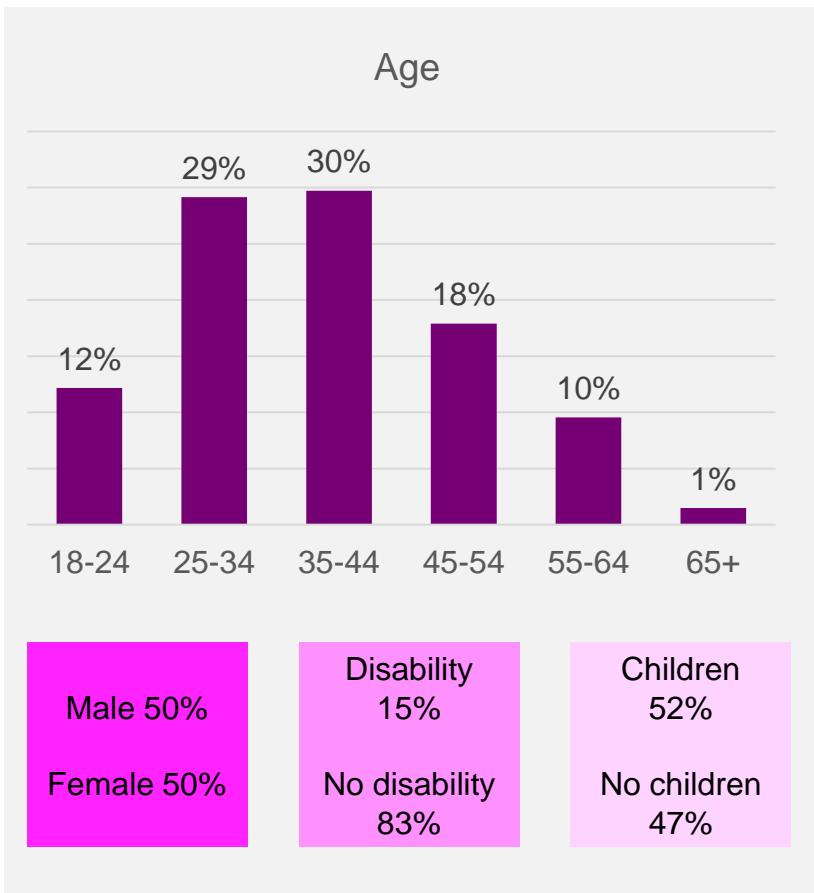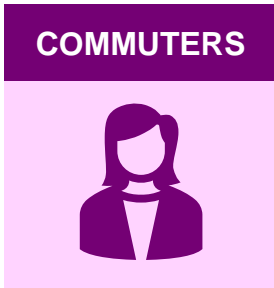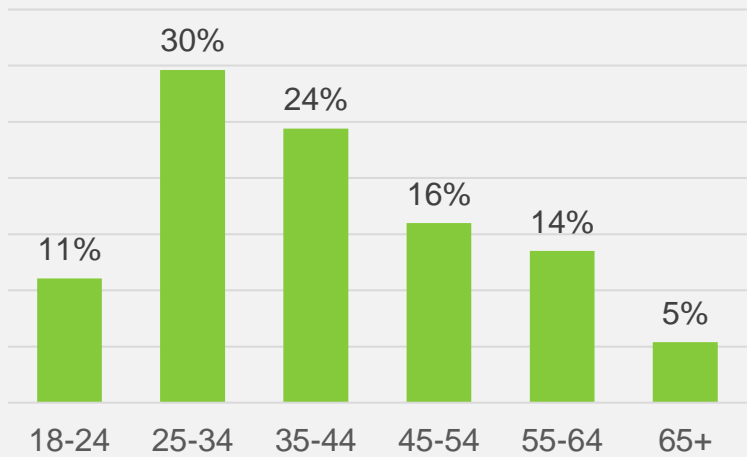
Male 61%

Female 39%

Disability 18%

No disability 80%

Children 54%

No children 45%

Category	%
Long Distance	25
London South East	52
Regional	15
Open access	2

Socio-economic group

19% 31% 24% 15% 8% 4%

A B C1 C2 D E

LEISURE

Age

18-24	14%
25-34	18%
35-44	13%
45-54	16%
55-64	19%
65+	19%
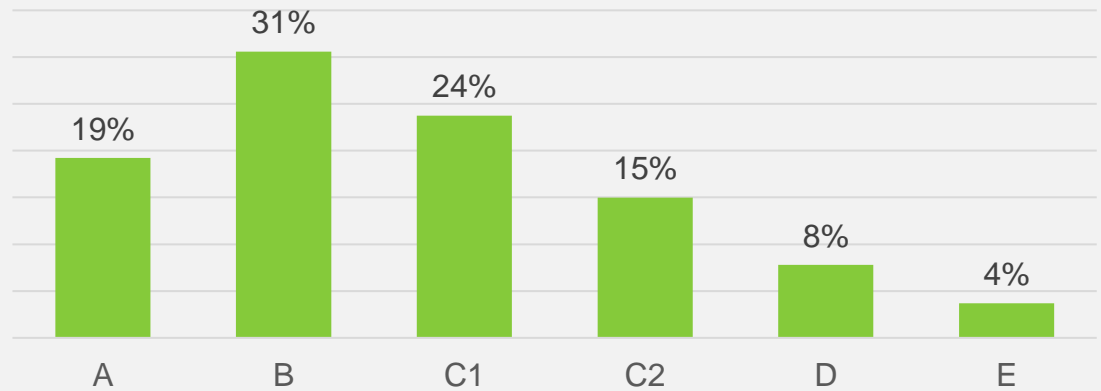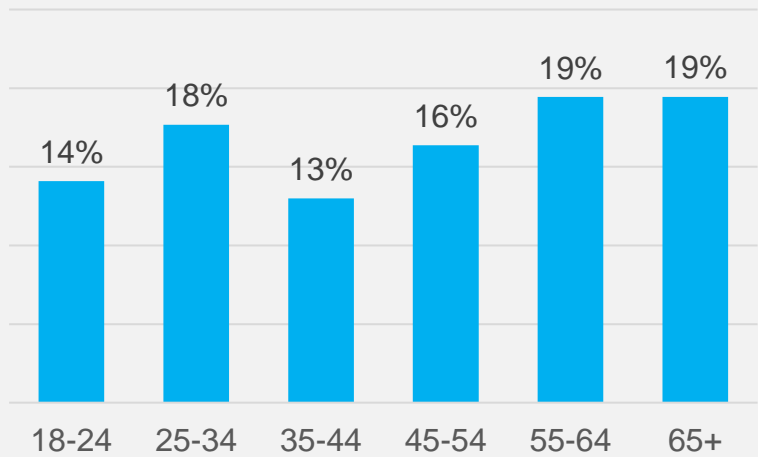
Male 51%
Female 49%

Disability 22%
No disability 77%

Children 35%
No children 64%

Category	%
Long Distance	22
London South East	45
Regional	21
Open access	2

Socio-economic group

A	B	C1	C2	D	E
9%	20%	31%	21%	9%	9%

Base: 2539
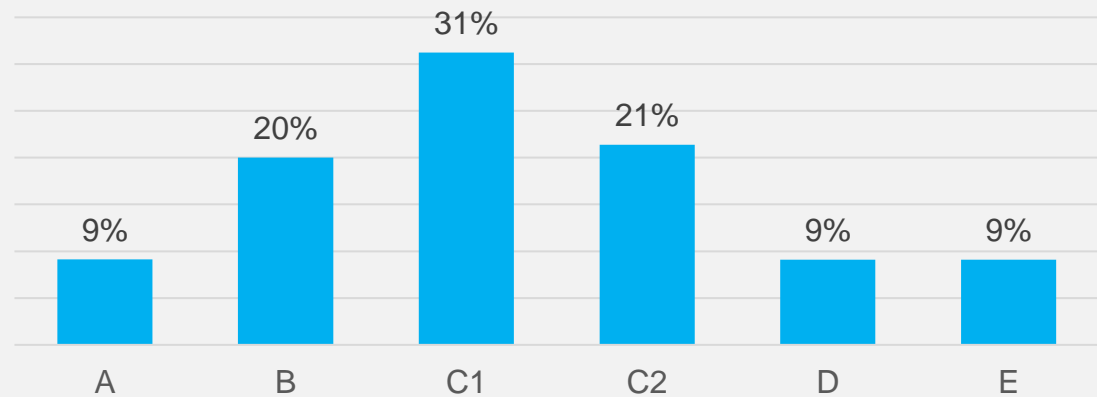
RECENT (IN THE LAST MONTH) TRAVELLERS' PROFILE
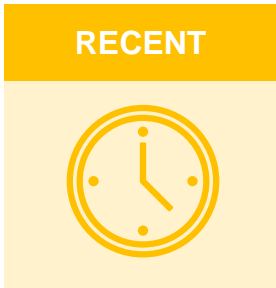
RECENT

Recent travellers are more likely to say that they have experienced disruption compared to those who last travelled over a month ago (23% vs 16%).

Age

- 18-24: 14%
- 25-34: 26%
- 35-44: 21%
- 45-54: 16%
- 55-64: 14%
- 65+: 9%

Male 53%

Female 47%

Disability 18%

No disability 80%

Children 46%

No children 53%

Category	%
Long Distance	18
London South East	54
Regional	20
Open access	2

Socio-economic group

- A: 12%
- B: 23%
- C1: 27%
- C2: 21%
- D: 12%
- E: 6%
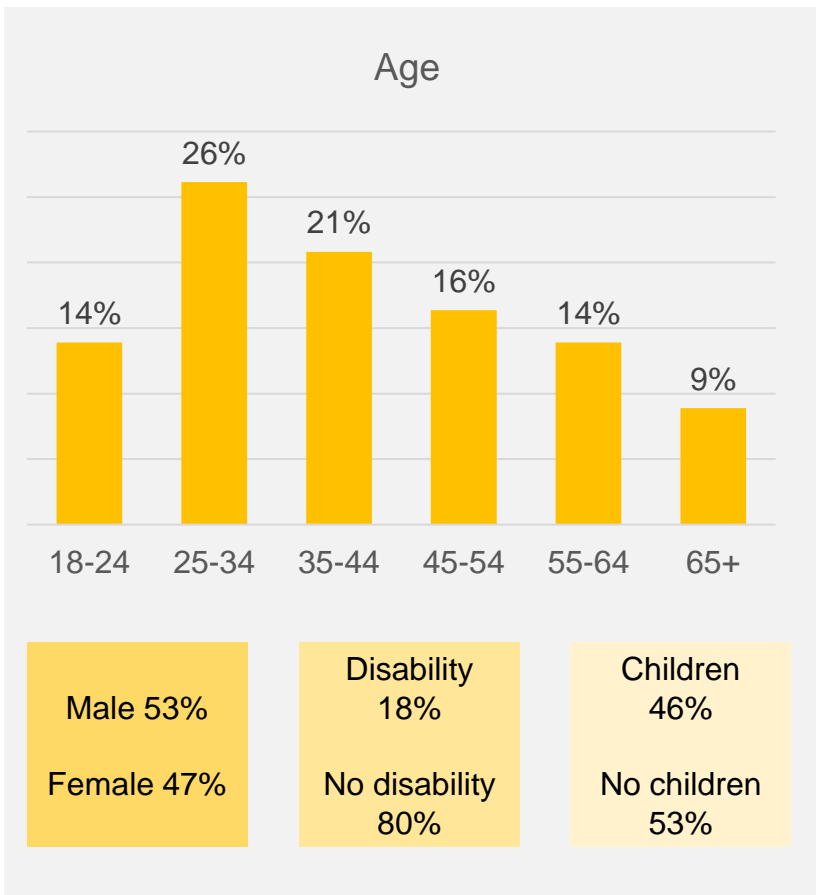
LESS RECENT (IN THE LAST SIX MONTHS TO ONE YEAR) TRAVELLERS' PROFILE

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LESS RECENT

Age

- 18-24: 12%
- 25-34: 13%
- 35-44: 13%
- 45-54: 17%
- 55-64: 22%
- 65+: 23%

Male 49%
Female 51%

Disability 23%
No disability 75%

Children 31%
No children 68%

Category	%
Long Distance	24
London South East	40
Regional	19
Open access	1

Socio-economic group

- A: 7%
- B: 17%
- C1: 35%
- C2: 22%
- D: 8%
- E: 10%

PLANNING JOURNEY AND PURCHASING TICKET

quadrangle

All commuters Ranked High-Low importance

Item	Value
A significantly simpler fare structure than the one that currently exists	11.09%
Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	8.58%
A simpler system for purchasing tickets (online or at a ticket machine) that helps you buy the best ticket for your journey	8.43%
Ability to tap in and out at stations using contactless cards to pay as you go	8.40%
View your train's real-time position on a live map via your device	7.60%

Anchor

Item	Value
One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	6.79%
One central Great British Railway website/app that is integrated with other transport apps (e.g. bus and taxi apps) to help with journey…	6.43%
Ticket/ customer service staff present near ticket machines to give information and help with ticket purchases	5.37%
Real-time information delivered to your device on the day of travel about how busy the train is	5.16%
Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/ delays, alternative routes)	4.96%
Ability to see how often specific trains are cancelled or delayed when booking a ticket	4.59%
One central Great British Railway website/app with up-to-date maps of inside the station (e.g. like Google streetview and a floorplan)	4.29%
Easily check if your ticket is valid for specific trains via the Great British Railway app/website	4.00%
Information on how busy a train is likely to be when booking a ticket	3.71%
Ability to book assistance for your journey when buying your ticket e.g. help getting on and off the train	3.36%

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S4Q1. Please select which potential improvements are the most important and least important to you when planning for your journey and purchasing your ticket.
Base: All commuters (n=664)

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JOURNEY TO/ ARRIVAL AT THE STATION, YOUR OVERALL STATION EXPERIENCE, AND YOUR EXPERIENCE MAKING DIFFERENT CONNECTIONS

quadrangle

All commuters   Ranked High-Low importance

Improvement	All commuters
Consistent, timely and accurate travel information at stations (e.g. from…	10.25%
Highly trained, helpful and well-informed staff - regardless of role - who…	7.25%
Improved accessibility at stations for older and disabled people, those…	6.32%
CCTV at every station	6.01%
Free, reliable, high-speed Wi-Fi at all stations	5.89%
Personalised, real-time information via your device about onward travel…	5.69%
High standard of facilities at large stations (e.g. waiting rooms, toilets,…	5.65%
Real-time information via your device for your journey to the station e.g.…	5.35%
Removing ticket barriers from stations and using new technology instead…	4.71%
Personalised, real-time information via your device to help with train…	4.52%
All stations well-maintained and cleaned to a high standard	4.48%
Easily understood signposting to facilities, exits and platform information…	4.03%
Real-time information on the platform about where to stand for your…	3.94%
Well-maintained and comfortable waiting areas at stations when waiting…	3.94%
Help points at every station which directly connect you to staff if you need…	3.70%
Good availability of parking close to stations, regardless of the time of day	3.60%
Understanding and helpful staff checking tickets at platforms	3.12%
All stations to have exactly the same style and format of signposting,…	2.85%

Anchor

S4Q5. Now please select which potential improvements are the most important and least important to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey
Base: All commuters (n=640)

transportfocus

OVERALL ONBOARD EXPERIENCE AND THE PROVISION OF JOURNEY SUPPORT/ INFORMATION

quadrangle

All commuters Ranked High-Low importance

Trains that are comfortable to travel on (e.g. plenty of seating around tables,…	7.81%
A guarantee that your ticket will be valid on other services when your travel…	6.54%
If your train is delayed by more than 15 minutes, access a link in-app, via…	6.19%
Free, reliable, high-speed Wi-Fi on all trains	5.80%
All trains well-maintained and cleaned to a high standard	5.41%
CCTV on every train	4.94%
Improved accessibility on trains for older and disabled people, those with…	4.63%
Clean and well-stocked toilets on trains	4.13%
Consistently reliable mobile phone signal on all trains, including in tunnels	4.09%
Real-time information via your device about on-board facilities in relation to…	3.96%
Helpful and well-informed staff on trains who can provide help to all customers	3.95%
Help points on all trains which directly connect you to staff if you need…	3.26%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on…	3.26%
Clear, easy to hear and relevant on-train announcements	3.25%
One national customer service department for all complaints, queries,…	3.10%
Free item such as a hot drink when train is late/cancelled in addition to the…	2.92%
A QR code on the back of every seat, providing real-time information for the…	2.87%
Understanding and helpful staff checking tickets on trains	2.74%
Widespread access to device charging on all trains	2.71%
Improved quality and consistent style of signposting/ information on trains…	2.07%
Plenty of space for luggage and pushchairs on trains	2.02%
Optional in-app, email or text notifications which ask for feedback and…	2.00%
Plenty of space for wheelchair users on trains	1.95%
Ability to order food and drink to your seat on longer distance journeys	1.85%
Broader range of food and drink (including to suit different dietary…	1.85%

Anchor

S4Q10. Finally, please again select which potential improvements are the most important and least important to you when thinking about your overall onboard experience and the provision of journey support/ information.
Base: All commuters (n=670)

transportfocus

54

PLANNING JOURNEY AND PURCHASING TICKET

R quadrangle

All business travellers   Ranked High-Low importance

Item	Value
A significantly simpler fare structure than the one that currently exists	13.08%
A simpler system for purchasing tickets (online or at a ticket machine) that helps you buy the best ticket for your journey	9.91%
Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	8.04%
Ability to tap in and out at stations using contactless cards to pay as you go	7.63%
One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	7.04%
View your train's real-time position on a live map via your device	6.65%

Anchor

Item	Value
Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/ delays, alternative routes)	6.12%
One central Great British Railway website/app that is integrated with other transport apps (e.g. bus and taxi apps) to help with journey…	5.70%
Ability to see how often specific trains are cancelled or delayed when booking a ticket	5.26%
Real-time information delivered to your device on the day of travel about how busy the train is	5.06%
Ticket/ customer service staff present near ticket machines to give information and help with ticket purchases	4.97%
Easily check if your ticket is valid for specific trains via the Great British Railway app/website	4.29%
Information on how busy a train is likely to be when booking a ticket	3.52%
One central Great British Railway website/app with up-to-date maps of inside the station (e.g. like Google streetview and a floorplan)	3.42%
Ability to book assistance for your journey when buying your ticket e.g. help getting on and off the train	3.11%

S4Q1. Please select which potential improvements are the most important and least important to you when planning for your journey and purchasing your ticket.
Base: All business travellers (n=297)

transportfocus

JOURNEY TO/ ARRIVAL AT THE STATION, YOUR OVERALL STATION EXPERIENCE, AND YOUR EXPERIENCE MAKING DIFFERENT CONNECTIONS

quadrangle

All business travellers   Ranked High-Low importance

Consistent, timely and accurate travel information at stations (e.g. from…	10.26%
Highly trained, helpful and well-informed staff - regardless of role - who…	7.81%
Free, reliable, high-speed Wi-Fi at all stations	6.77%
High standard of facilities at large stations (e.g. waiting rooms, toilets,…	6.24%
Real-time information via your device for your journey to the station e.g.…	6.07%
Improved accessibility at stations for older and disabled people, those…	5.88%
Personalised, real-time information via your device about onward travel…	5.53%
Real-time information on the platform about where to stand for your…	5.48%
Personalised, real-time information via your device to help with train…	4.74%
CCTV at every station	4.55%
Good availability of parking close to stations, regardless of the time of day	4.52%
Removing ticket barriers from stations and using new technology instead…	4.49%
Well-maintained and comfortable waiting areas at stations when waiting…	4.22%
Easily understood signposting to facilities, exits and platform information…	4.16%
All stations well-maintained and cleaned to a high standard	4.15%
Help points at every station which directly connect you to staff if you need…	3.96%
Understanding and helpful staff checking tickets at platforms	2.95%
All stations to have exactly the same style and format of signposting,…	2.56%

Anchor

S4Q5. Now please select which potential improvements are the most important and least important to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey
Base: All business travellers (n=304)

transportfocus

OVERALL ONBOARD EXPERIENCE AND THE PROVISION OF JOURNEY SUPPORT/ INFORMATION

quadrangle

All business travellers   Ranked High-Low importance

Improvement	%
Trains that are comfortable to travel on (e.g. plenty of seating around tables,…	10.80%
Free, reliable, high-speed Wi-Fi on all trains	8.11%
A guarantee that your ticket will be valid on other services when your travel…	7.56%
All trains well-maintained and cleaned to a high standard	5.91%
CCTV on every train	4.81%
If your train is delayed by more than 15 minutes, access a link in-app, via…	4.61%
Helpful and well-informed staff on trains who can provide help to all customers	4.43%
Improved accessibility on trains for older and disabled people, those with…	4.35%
Clean and well-stocked toilets on trains	3.95%
Clear, easy to hear and relevant on-train announcements	3.84%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on…	3.68%
Consistently reliable mobile phone signal on all trains, including in tunnels	3.57%
Help points on all trains which directly connect you to staff if you need…	3.26%
Understanding and helpful staff checking tickets on trains	2.76%
Real-time information via your device about on-board facilities in relation to…	2.68%
One national customer service department for all complaints, queries,…	2.68%
Widespread access to device charging on all trains	2.62%
Plenty of space for wheelchair users on trains	2.31%
Improved quality and consistent style of signposting/ information on trains…	2.29%
Free item such as a hot drink when train is late/cancelled in addition to the…	1.95%
A QR code on the back of every seat, providing real-time information for the…	1.89%
Optional in-app, email or text notifications which ask for feedback and…	1.87%
Plenty of space for luggage and pushchairs on trains	1.78%
Ability to order food and drink to your seat on longer distance journeys	1.70%
Broader range of food and drink (including to suit different dietary…	1.65%

Anchor

S4Q10. Finally, please again select which potential improvements are the most important and least important to you when thinking about your overall onboard experience and the provision of journey support/ information.
Base: All business travellers (n=305)

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PLANNING JOURNEY AND PURCHASING TICKET

quadrangle

All leisure travellers   Ranked High-Low importance

Item	Value
A significantly simpler fare structure than the one that currently exists	16.40%
A simpler system for purchasing tickets (online or at a ticket machine) that helps you buy the best ticket for your journey	11.50%
Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	8.57%

Anchor

Item	Value
One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	7.47%
Ticket/ customer service staff present near ticket machines to give information and help with ticket purchases	6.59%
Ability to tap in and out at stations using contactless cards to pay as you go	6.29%
View your train's real-time position on a live map via your device	5.99%
Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/ delays, alternative routes)	4.75%
One central Great British Railway website/app that is integrated with other transport apps (e.g. bus and taxi apps) to help with journey…	4.69%
Real-time information delivered to your device on the day of travel about how busy the train is	4.53%
Ability to see how often specific trains are cancelled or delayed when booking a ticket	3.69%
Information on how busy a train is likely to be when booking a ticket	2.95%
Easily check if your ticket is valid for specific trains via the Great British Railway app/website	2.87%
Ability to book assistance for your journey when buying your ticket e.g. help getting on and off the train	2.85%
One central Great British Railway website/app with up-to-date maps of inside the station (e.g. like Google streetview and a floorplan)	2.80%

S4Q1. Please select which potential improvements are the most important and least important to you when planning for your journey and purchasing your ticket.
Base: All leisure travellers (n=1713)

transportfocus

JOURNEY TO/ ARRIVAL AT THE STATION, YOUR OVERALL STATION EXPERIENCE, AND YOUR EXPERIENCE MAKING DIFFERENT CONNECTIONS

quadrangle

All leisure travellers   Ranked High-Low importance

Consistent, timely and accurate travel information at stations (e.g. from…	12.06%
Highly trained, helpful and well-informed staff - regardless of role - who…	10.47%
Improved accessibility at stations for older and disabled people, those…	7.14%
CCTV at every station	7.00%

Anchor

High standard of facilities at large stations (e.g. waiting rooms, toilets,…	5.75%
Real-time information on the platform about where to stand for your…	5.08%
Easily understood signposting to facilities, exits and platform information…	4.90%
Free, reliable, high-speed Wi-Fi at all stations	4.89%
Personalised, real-time information via your device about onward travel…	4.79%
Real-time information via your device for your journey to the station e.g.…	4.59%
Personalised, real-time information via your device to help with train…	4.34%
All stations well-maintained and cleaned to a high standard	4.12%
Good availability of parking close to stations, regardless of the time of day	3.41%
Understanding and helpful staff checking tickets at platforms	3.37%
Well-maintained and comfortable waiting areas at stations when waiting…	3.30%
Help points at every station which directly connect you to staff if you need…	3.20%
Removing ticket barriers from stations and using new technology instead…	3.10%
All stations to have exactly the same style and format of signposting,…	2.03%

S4Q5. Now please select which potential improvements are the most important and least important to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey
Base: All leisure travellers (n=1698)

transportfocus

OVERALL ONBOARD EXPERIENCE AND THE PROVISION OF JOURNEY SUPPORT/ INFORMATION

quadrangle

All leisure travellers   Ranked High-Low importance

Trains that are comfortable to travel on (e.g. plenty of seating around tables,…	11.32%
A guarantee that your ticket will be valid on other services when your travel…	10.31%
All trains well-maintained and cleaned to a high standard	6.89%
CCTV on every train	6.51%
Helpful and well-informed staff on trains who can provide help to all customers	5.47%
Free, reliable, high-speed Wi-Fi on all trains	4.98%
Improved accessibility on trains for older and disabled people, those with…	4.97%
Clean and well-stocked toilets on trains	4.80%
If your train is delayed by more than 15 minutes, access a link in-app, via…	4.41%
Clear, easy to hear and relevant on-train announcements	4.14%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on…	3.06%
Understanding and helpful staff checking tickets on trains	3.00%
Consistently reliable mobile phone signal on all trains, including in tunnels	2.68%
Help points on all trains which directly connect you to staff if you need…	2.51%
Plenty of space for luggage and pushchairs on trains	2.35%
Real-time information via your device about on-board facilities in relation to…	2.19%
Free item such as a hot drink when train is late/cancelled in addition to the…	2.11%
Plenty of space for wheelchair users on trains	2.06%
Widespread access to device charging on all trains	1.96%
One national customer service department for all complaints, queries,…	1.90%
Improved quality and consistent style of signposting/ information on trains…	1.49%
A QR code on the back of every seat, providing real-time information for the…	1.46%
Ability to order food and drink to your seat on longer distance journeys	1.38%
Broader range of food and drink (including to suit different dietary…	1.17%
Optional in-app, email or text notifications which ask for feedback and…	1.04%

Anchor

S4Q10. Finally, please again select which potential improvements are the most important and least important to you when thinking about your overall onboard experience and the provision of journey support/ information.
Base: All leisure travellers (n=1667)

transportfocus

PLANNING JOURNEY AND PURCHASING TICKET

quadrangle

All recent travellers   Ranked High-Low importance

Improvement	%
A significantly simpler fare structure than the one that currently exists	13.23%
A simpler system for purchasing tickets (online or at a ticket machine) that helps you buy the best ticket for your journey	9.84%
Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	8.89%
Ability to tap in and out at stations using contactless cards to pay as you go	7.56%
One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	7.02%
View your train's real-time position on a live map via your device	6.90%

Anchor

Improvement	%
Ticket/ customer service staff present near ticket machines to give information and help with ticket purchases	5.84%
One central Great British Railway website/app that is integrated with other transport apps (e.g. bus and taxi apps) to help with journey…	5.64%
Real-time information delivered to your device on the day of travel about how busy the train is	5.15%
Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/ delays, alternative routes)	5.13%
Ability to see how often specific trains are cancelled or delayed when booking a ticket	4.53%
Easily check if your ticket is valid for specific trains via the Great British Railway app/website	3.64%
One central Great British Railway website/app with up-to-date maps of inside the station (e.g. like Google streetview and a floorplan)	3.56%
Information on how busy a train is likely to be when booking a ticket	3.51%
Ability to book assistance for your journey when buying your ticket e.g. help getting on and off the train	3.03%

S4Q1. Please select which potential improvements are the most important and least important to you when planning for your journey and purchasing your ticket.
Base: All recent travellers (n=2016)

transportfocus

JOURNEY TO/ ARRIVAL AT THE STATION, YOUR OVERALL STATION EXPERIENCE, AND YOUR EXPERIENCE MAKING DIFFERENT CONNECTIONS

quadrangle

All recent travellers   Ranked High-Low importance

Consistent, timely and accurate travel information at stations (e.g. from…	11.13%
Highly trained, helpful and well-informed staff - regardless of role - who…	8.75%
Improved accessibility at stations for older and disabled people, those…	6.59%

Anchor

CCTV at every station	6.22%
Free, reliable, high-speed Wi-Fi at all stations	5.89%
High standard of facilities at large stations (e.g. waiting rooms, toilets,…	5.83%
Personalised, real-time information via your device about onward travel…	5.57%
Real-time information via your device for your journey to the station e.g.…	5.46%
Real-time information on the platform about where to stand for your…	4.80%
Personalised, real-time information via your device to help with train…	4.75%
All stations well-maintained and cleaned to a high standard	4.37%
Easily understood signposting to facilities, exits and platform information…	4.25%
Removing ticket barriers from stations and using new technology instead…	3.99%
Well-maintained and comfortable waiting areas at stations when waiting…	3.69%
Help points at every station which directly connect you to staff if you need…	3.44%
Understanding and helpful staff checking tickets at platforms	3.22%
Good availability of parking close to stations, regardless of the time of day	3.22%
All stations to have exactly the same style and format of signposting,…	2.46%

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S4Q5. Now please select which potential improvements are the most important and least important to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey
Base: All recent travellers (n=1966)

transportfocus

OVERALL ONBOARD EXPERIENCE AND THE PROVISION OF JOURNEY SUPPORT/ INFORMATION

quadrangle

All recent travellers   Ranked High-Low importance

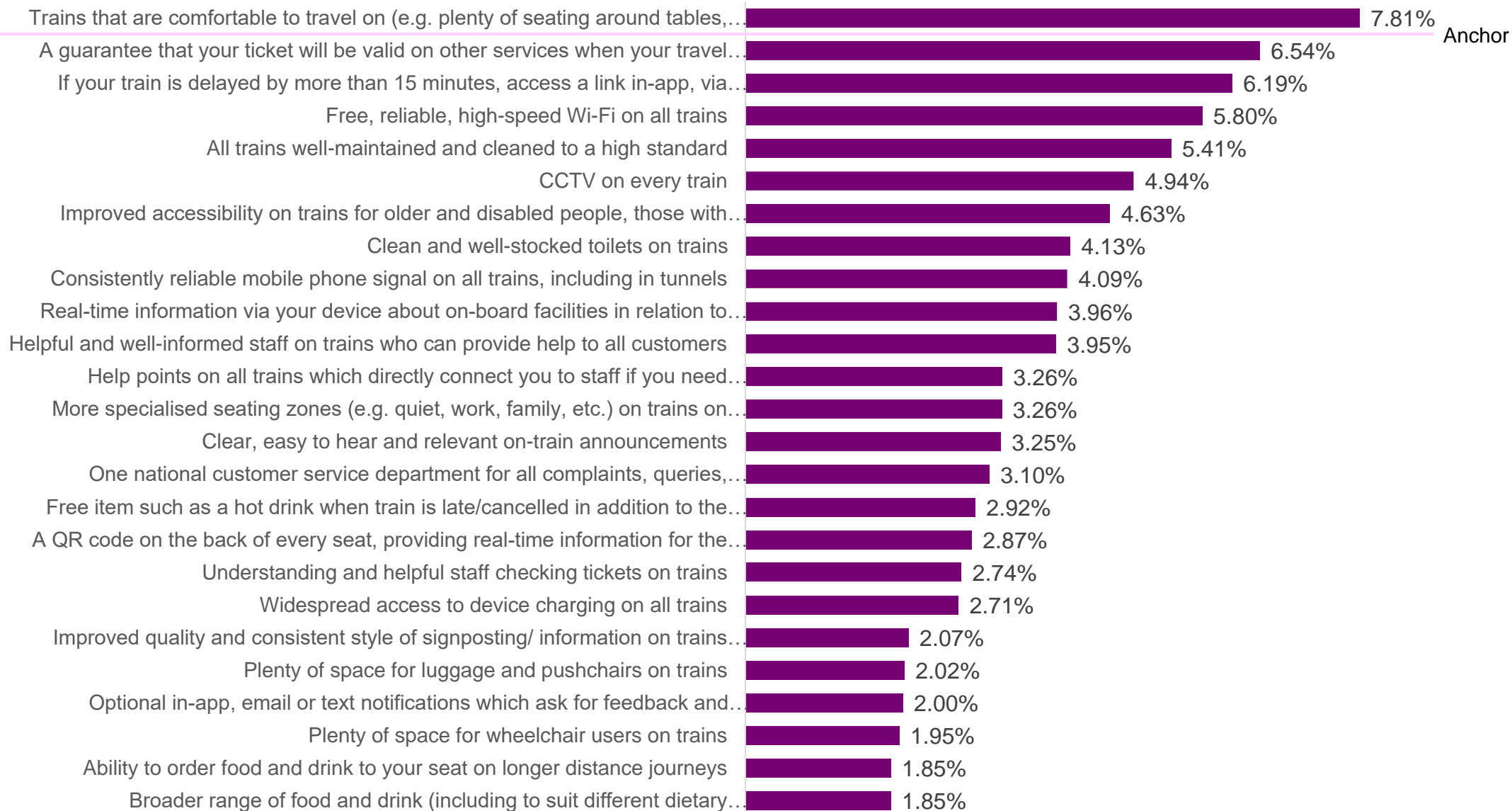|	
Trains that are comfortable to travel on (e.g. plenty of seating around tables,…	9.57%
A guarantee that your ticket will be valid on other services when your travel…	8.37%
All trains well-maintained and cleaned to a high standard	5.88%
Free, reliable, high-speed Wi-Fi on all trains	5.67%
CCTV on every train	5.46%
If your train is delayed by more than 15 minutes, access a link in-app, via…	5.34%
Improved accessibility on trains for older and disabled people, those with…	4.70%
Helpful and well-informed staff on trains who can provide help to all customers	4.50%
Clean and well-stocked toilets on trains	4.36%
Clear, easy to hear and relevant on-train announcements	3.71%
Consistently reliable mobile phone signal on all trains, including in tunnels	3.56%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on…	3.32%
Real-time information via your device about on-board facilities in relation to…	3.12%
Help points on all trains which directly connect you to staff if you need…	2.89%
Understanding and helpful staff checking tickets on trains	2.76%
One national customer service department for all complaints, queries,…	2.59%
Free item such as a hot drink when train is late/cancelled in addition to the…	2.59%
Widespread access to device charging on all trains	2.52%
Plenty of space for luggage and pushchairs on trains	2.21%
A QR code on the back of every seat, providing real-time information for the…	2.21%
Plenty of space for wheelchair users on trains	2.07%
Improved quality and consistent style of signposting/ information on trains…	1.90%
Ability to order food and drink to your seat on longer distance journeys	1.73%
Broader range of food and drink (including to suit different dietary…	1.64%
Optional in-app, email or text notifications which ask for feedback and…	1.60%

Anchor

S4Q10. Finally, please again select which potential improvements are the most important and least important to you when thinking about your overall onboard experience and the provision of journey support/ information.
Base: All recent travellers (n=1968)

transportfocus

PLANNING JOURNEY AND PURCHASING TICKET

quadrangle

All less recent travellers   Ranked High-Low importance

Improvement	%
A significantly simpler fare structure than the one that currently exists	18.04%
A simpler system for purchasing tickets (online or at a ticket machine) that helps you buy the best ticket for your journey	12.21%

Anchor

Improvement	%
One central Great British Railway website/ app for all journey planning and ticket purchases (regardless of train operator)	7.77%
Tickets that you can use across multiple forms of transport (e.g. train, bus or tram)	7.73%
Ticket/ customer service staff present near ticket machines to give information and help with ticket purchases	6.75%
Ability to tap in and out at stations using contactless cards to pay as you go	5.63%
View your train's real-time position on a live map via your device	5.48%
Optional updates via your device with journey information on the day of travel (e.g. platform, on-time/ delays, alternative routes)	4.54%
One central Great British Railway website/app that is integrated with other transport apps (e.g. bus and taxi apps) to help with journey planning	4.30%
Real-time information delivered to your device on the day of travel about how busy the train is	3.86%
Ability to see how often specific trains are cancelled or delayed when booking a ticket	3.10%
Ability to book assistance for your journey when buying your ticket e.g. help getting on and off the train	2.93%
Easily check if your ticket is valid for specific trains via the Great British Railway app/website	2.55%
One central Great British Railway website/app with up-to-date maps of inside the station (e.g. like Google streetview and a floorplan)	2.52%
Information on how busy a train is likely to be when booking a ticket	2.51%

S4Q1. Please select which potential improvements are the most important and least important to you when planning for your journey and purchasing your ticket.
Base: All less recent travellers (n=658)

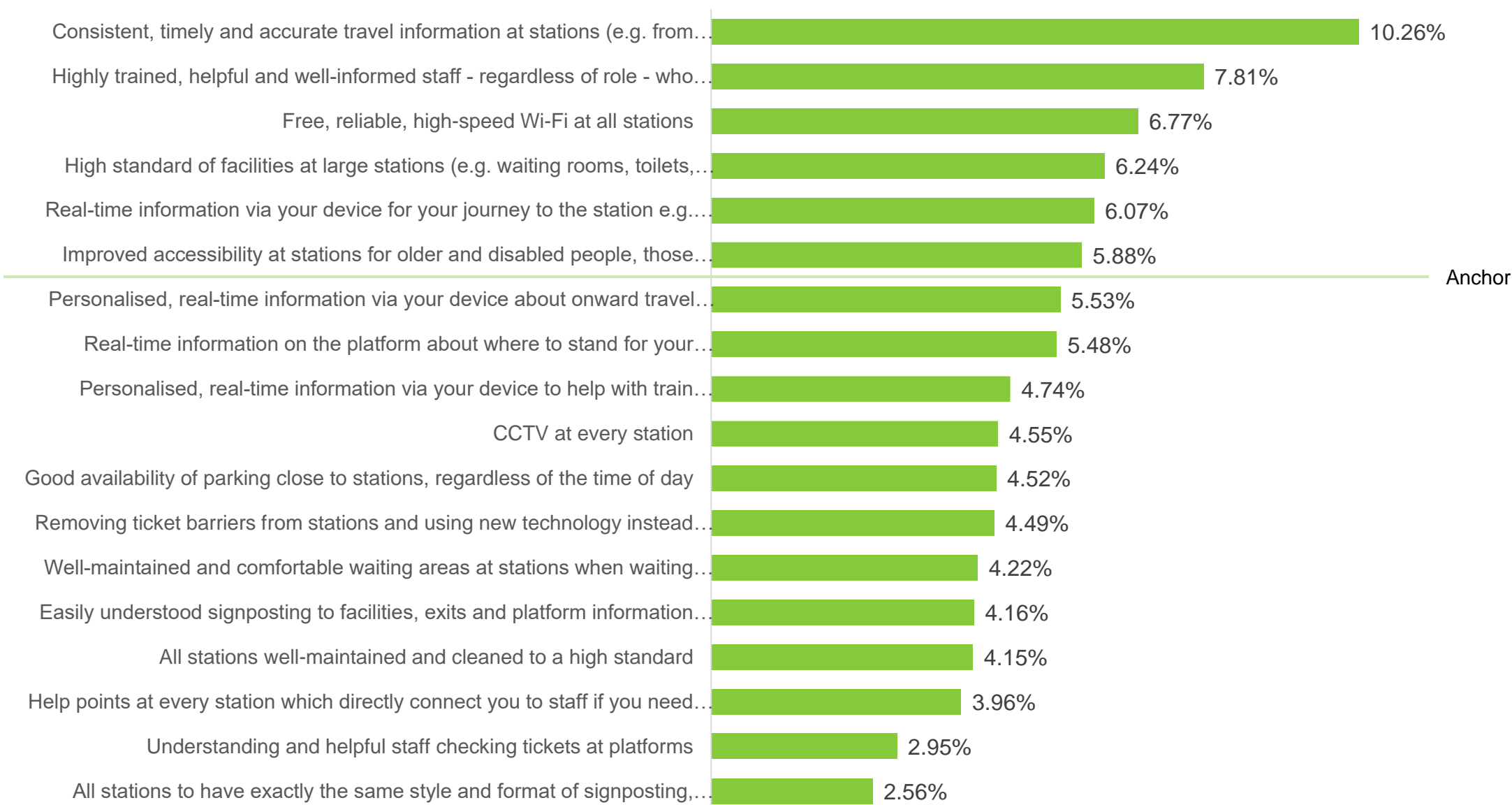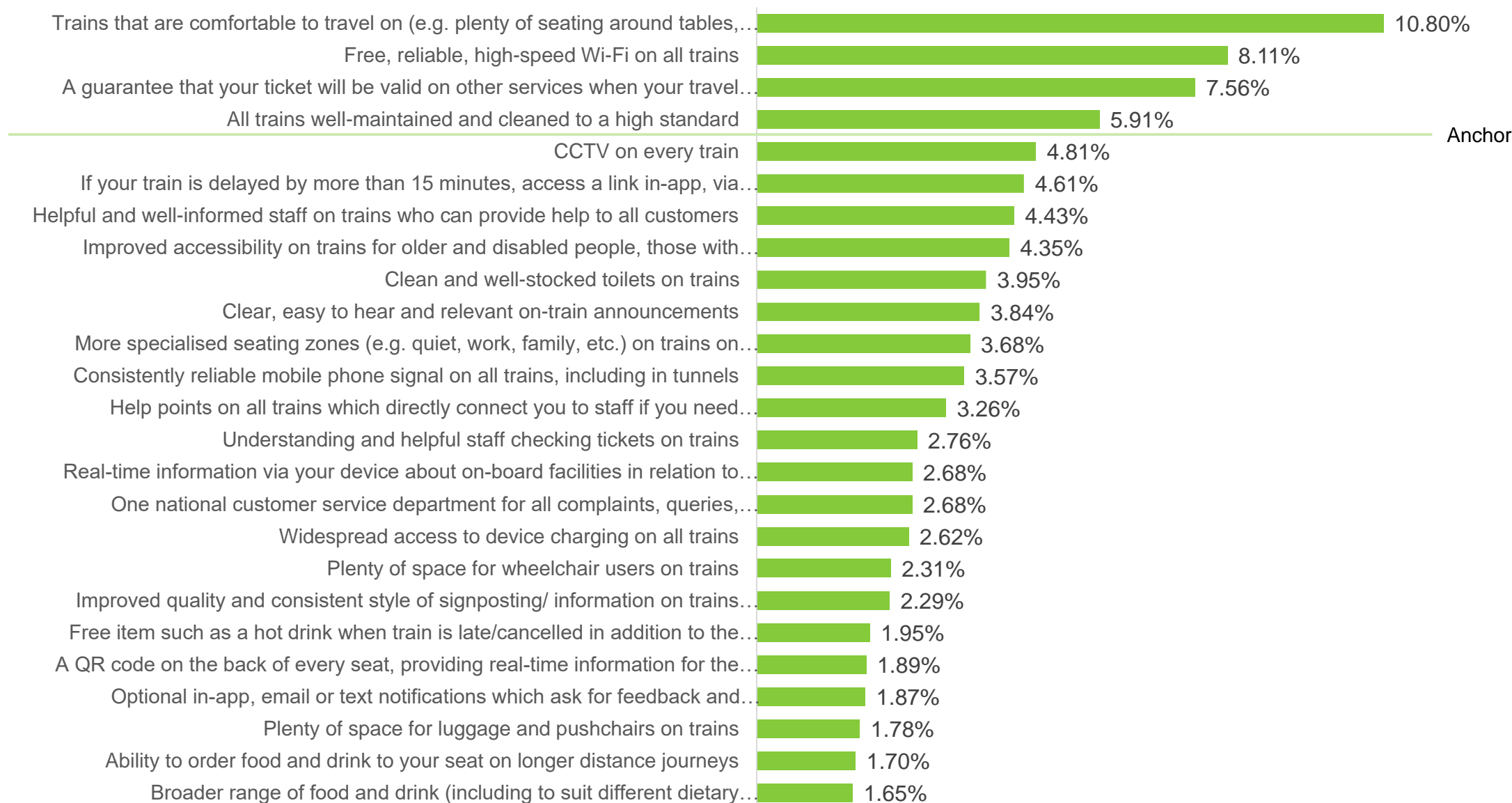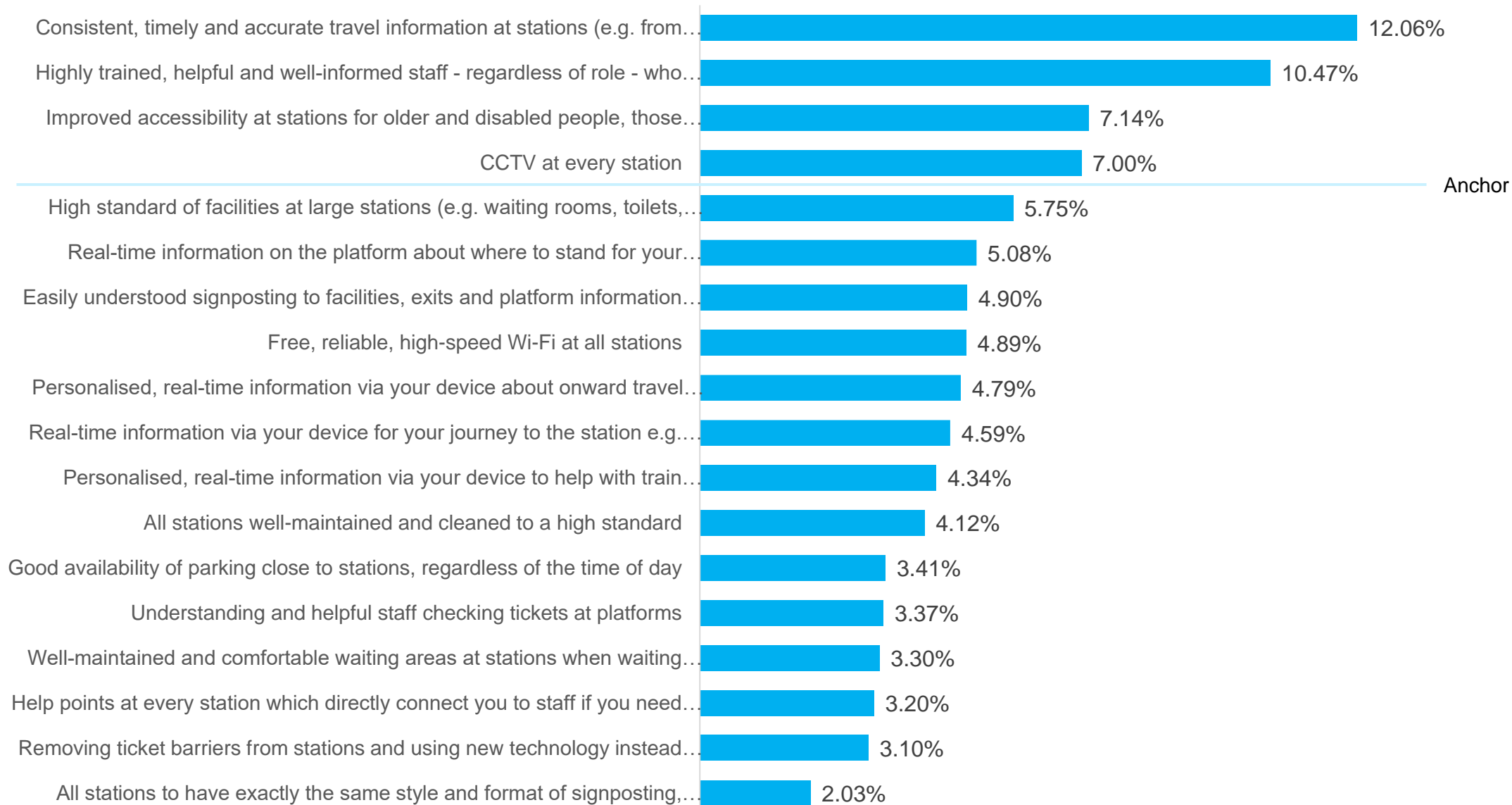**transportfocus**

JOURNEY TO/ ARRIVAL AT THE STATION, YOUR OVERALL STATION EXPERIENCE, AND YOUR EXPERIENCE MAKING DIFFERENT CONNECTIONS

quadrangle

All less recent travellers   Ranked High-Low importance

Consistent, timely and accurate travel information at stations (e.g. from…	12.07%
Highly trained, helpful and well-informed staff - regardless of role - who…	10.79%
	Anchor
Improved accessibility at stations for older and disabled people, those…	7.24%
CCTV at every station	7.08%
High standard of facilities at large stations (e.g. waiting rooms, toilets,…	5.68%
Easily understood signposting to facilities, exits and platform information…	5.36%
Real-time information on the platform about where to stand for your…	4.95%
Good availability of parking close to stations, regardless of the time of day	4.31%
Free, reliable, high-speed Wi-Fi at all stations	4.19%
Personalised, real-time information via your device about onward travel…	4.08%
All stations well-maintained and cleaned to a high standard	3.87%
Real-time information via your device for your journey to the station e.g…	3.85%
Personalised, real-time information via your device to help with train…	3.75%
Understanding and helpful staff checking tickets at platforms	3.35%
Help points at every station which directly connect you to staff if you need…	3.32%
Well-maintained and comfortable waiting areas at stations when waiting…	3.27%
Removing ticket barriers from stations and using new technology instead…	2.88%
All stations to have exactly the same style and format of signposting,…	1.92%

S4Q5. Now please select which potential improvements are the most important and least important to you when thinking about your journey to/ arrival at the station, your overall station experience, and your experience making different connections as part of your journey
Base: All less recent travellers (n=676)

transportfocus

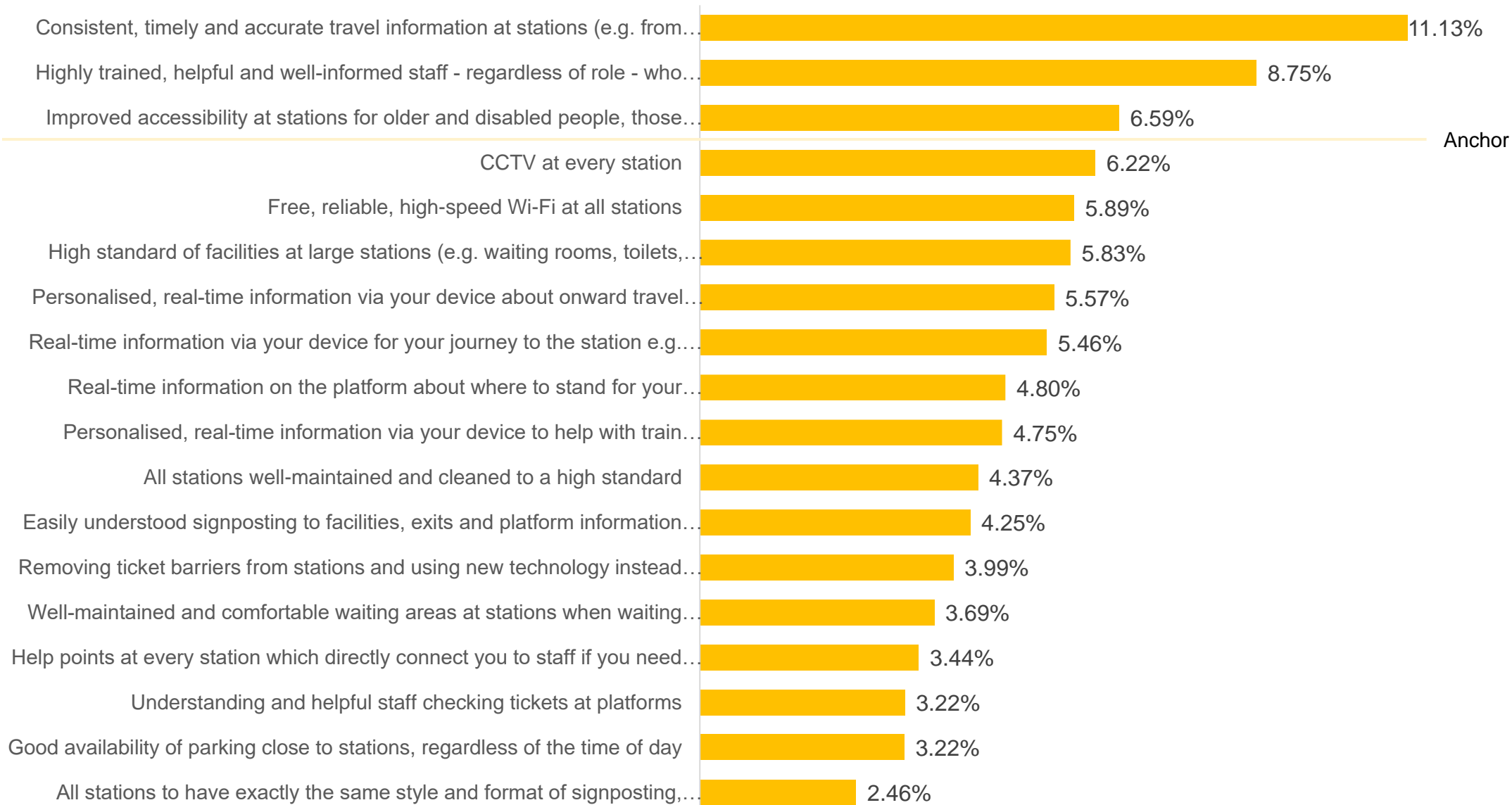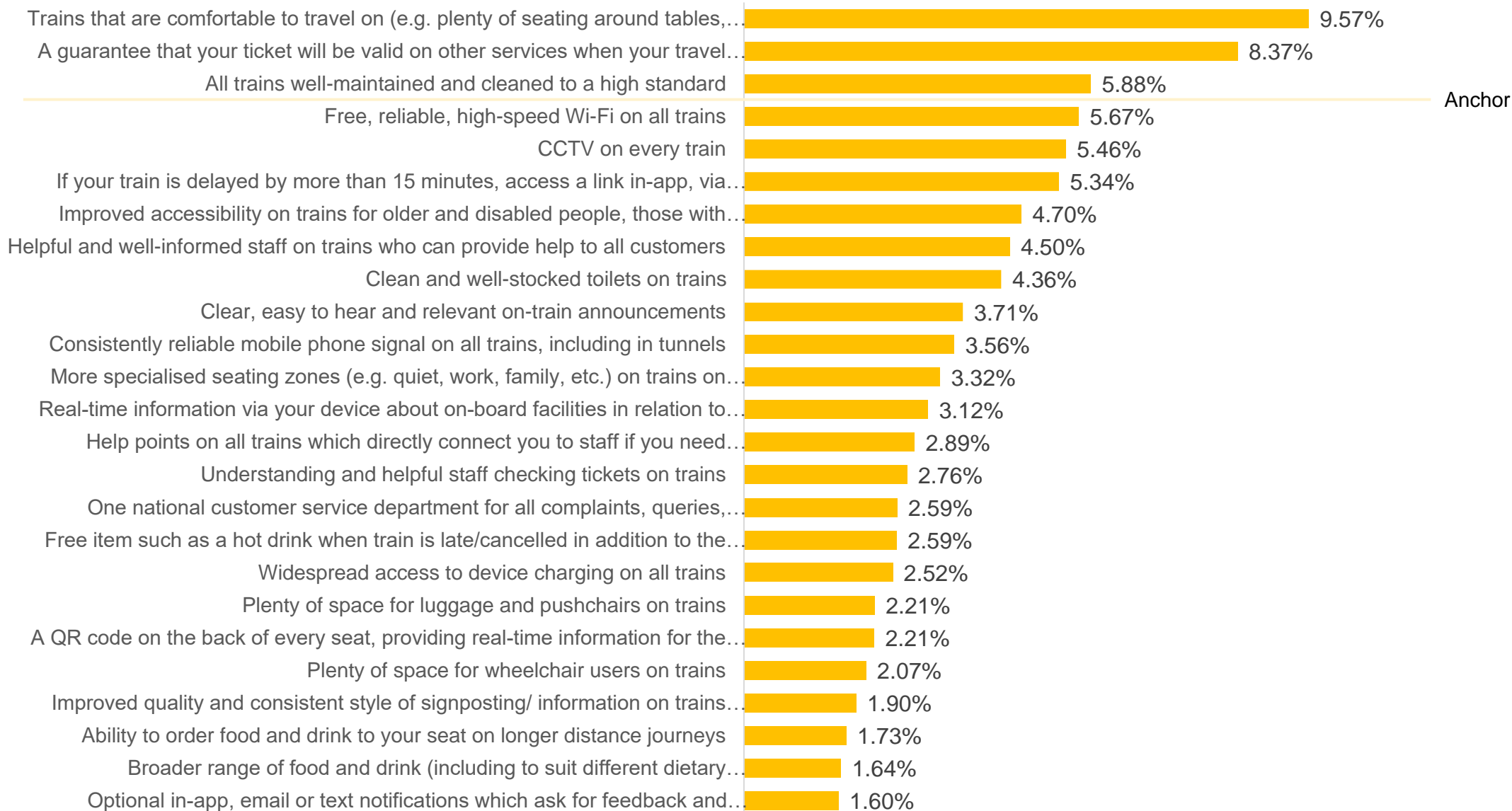# OVERALL ONBOARD EXPERIENCE AND THE PROVISION OF JOURNEY SUPPORT/ INFORMATION

quadrangle

All less recent travellers   Ranked High-Low importance

Attribute	%
Trains that are comfortable to travel on (e.g. plenty of seating around tables,…	12.13%
A guarantee that your ticket will be valid on other services when your travel…	10.56%
All trains well-maintained and cleaned to a high standard	7.52%
CCTV on every train	6.92%
Helpful and well-informed staff on trains who can provide help to all customers	5.97%
Free, reliable, high-speed Wi-Fi on all trains	5.22%
Improved accessibility on trains for older and disabled people, those with…	5.07%
Clean and well-stocked toilets on trains	4.92%
Clear, easy to hear and relevant on-train announcements	4.26%
If your train is delayed by more than 15 minutes, access a link in-app, via…	3.90%
Understanding and helpful staff checking tickets on trains	3.22%
More specialised seating zones (e.g. quiet, work, family, etc.) on trains on…	2.88%
Help points on all trains which directly connect you to staff if you need…	2.55%
Consistently reliable mobile phone signal on all trains, including in tunnels	2.23%
Plenty of space for luggage and pushchairs on trains	2.20%
Plenty of space for wheelchair users on trains	2.04%
Real-time information via your device about on-board facilities in relation to…	1.78%
Free item such as a hot drink when train is late/cancelled in addition to the…	1.69%
One national customer service department for all complaints, queries,…	1.63%
Widespread access to device charging on all trains	1.60%
Improved quality and consistent style of signposting/ information on trains…	1.35%
A QR code on the back of every seat, providing real-time information for the…	1.13%
Ability to order food and drink to your seat on longer distance journeys	1.12%
Optional in-app, email or text notifications which ask for feedback and…	0.88%
Broader range of food and drink (including to suit different dietary…	0.87%

Anchor

S4Q10. Finally, please again select which potential improvements are the most important and least important to you when thinking about your overall onboard experience and the provision of journey support/ information.
Base: All less recent travellers (n=674)

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