

3 January 2024

Edition 22

Rail User Survey



Introduction



The Rail User Survey asks a representative sample of people in Great Britain about their experience of travelling by rail in the last seven days.

For those that have used rail, the survey asks their journey purpose and how satisfied they were with the overall journey and with aspects such as value for money, punctuality and cleanliness.

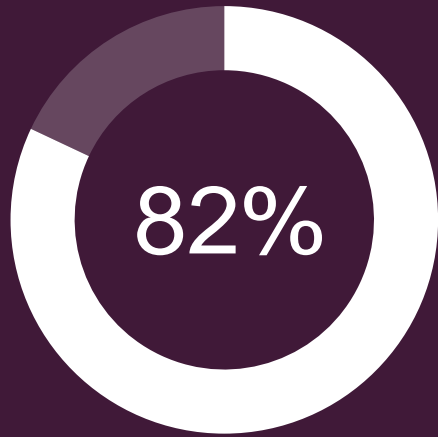
In a typical survey we get this satisfaction information from around 250 people. We usually survey passengers

every other weekend and report results every four weeks, combining two survey waves.

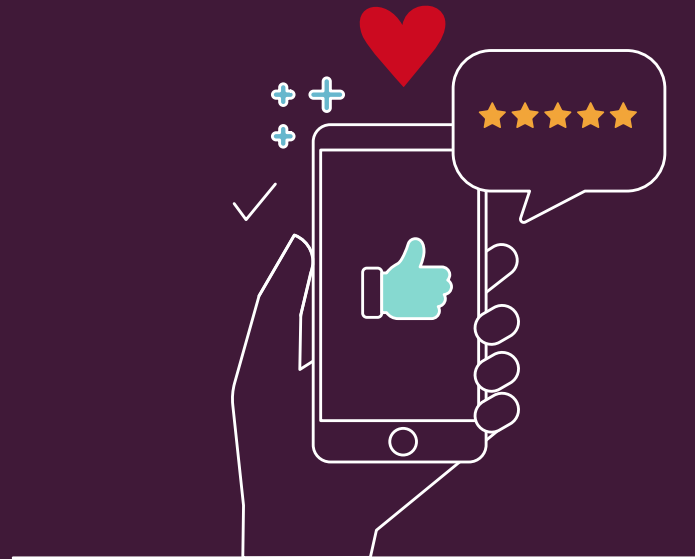
Due to Christmas and New Year the last two surveys were conducted 1 to 3 December and 15 to 17 December 2023. Further details on how we carried out this survey are available on page 40.

This survey is also used to produce a report every six months showing satisfaction for each train operating company (where sample size allows).

Rail headlines



82% of rail passengers were satisfied with their journey overall.



Overall satisfaction with the station increased slightly to 80% from 78% in the previous report.

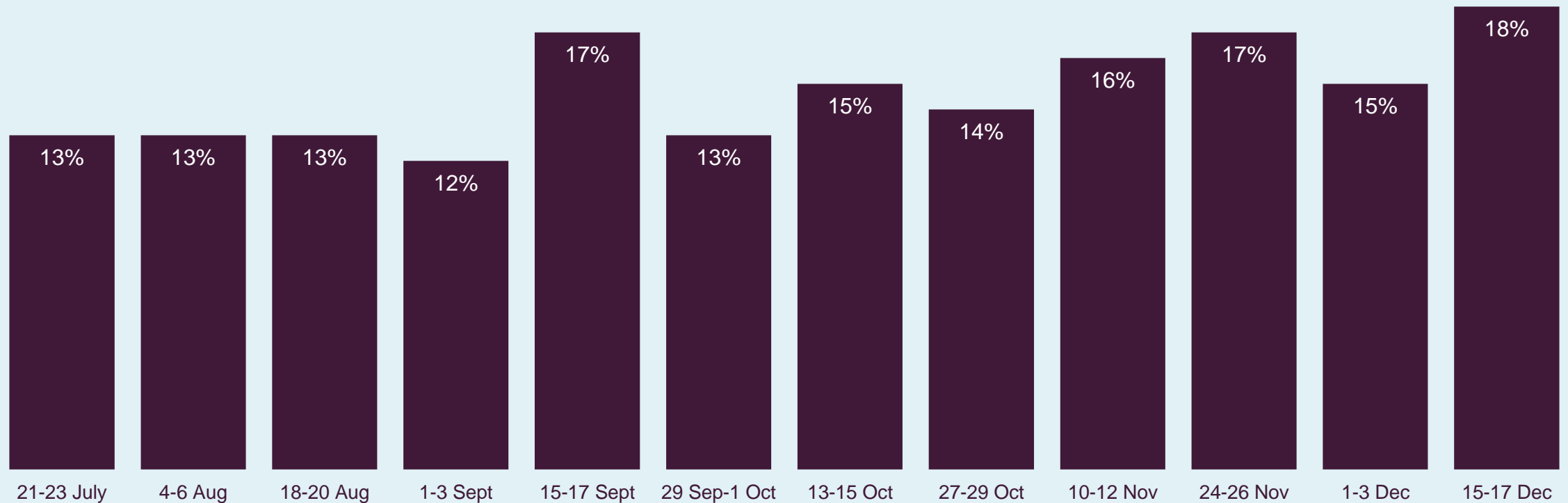


Satisfaction with the punctuality/reliability has continued to fall, now 72% compared to 74% in the previous report.

Rail usage levels



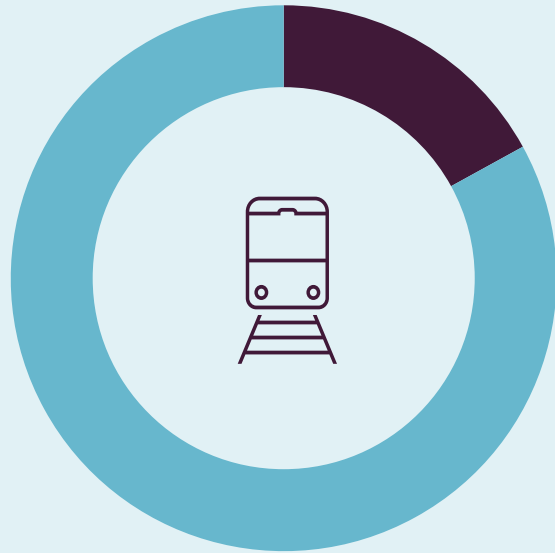
Proportion using rail in last seven days over time



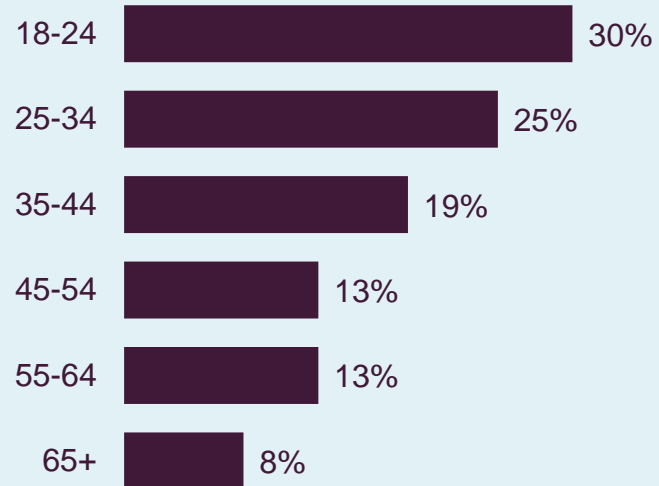
3 January 2024 report. Rail use is defined as having travelled by rail within seven days of being surveyed. Base size around 2000 per survey.

Proportion using rail in the last seven days

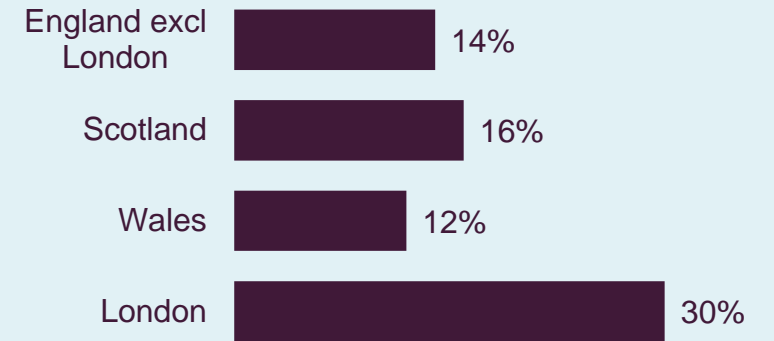
All Great Britain



Age



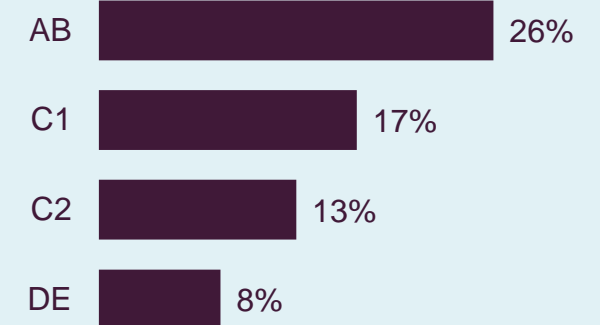
Region



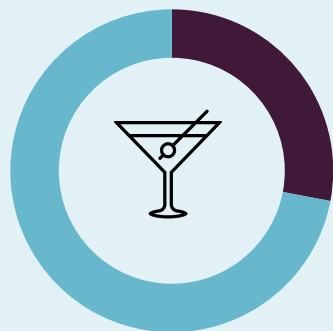
Gender



Social grade



Main purpose of rail journey



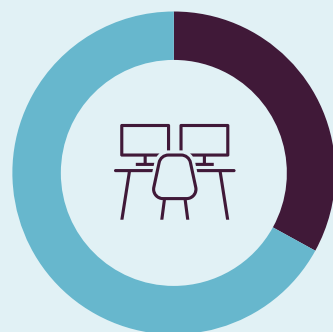
Leisure/eating out/non-essential shopping
28%



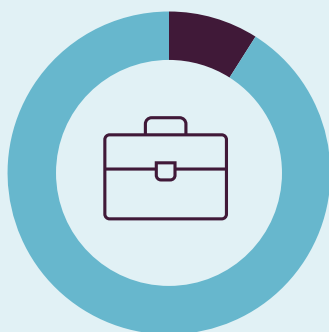
Friends/family
22%



Essential shopping
3%



Commuting
33%



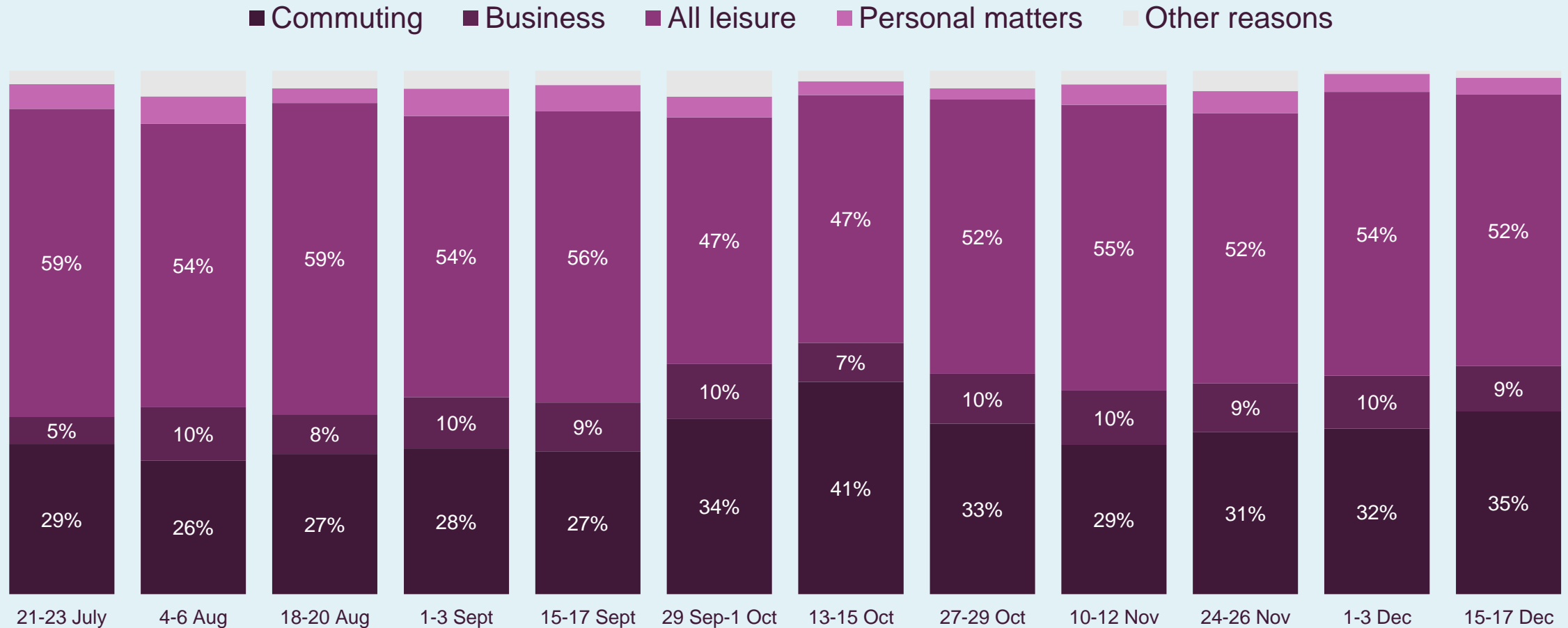
Work travel
9%



Personal matters
3%

3 January 2024 report. Charts are based on the most recent train journey made within seven days of being surveyed and show the average of the two surveys conducted in the last four weeks. Base size: all rail users - 680. Note that sum of the journey purposes may not add to 100 per cent as some have listed 'other reason'.

Main purpose of journey over time

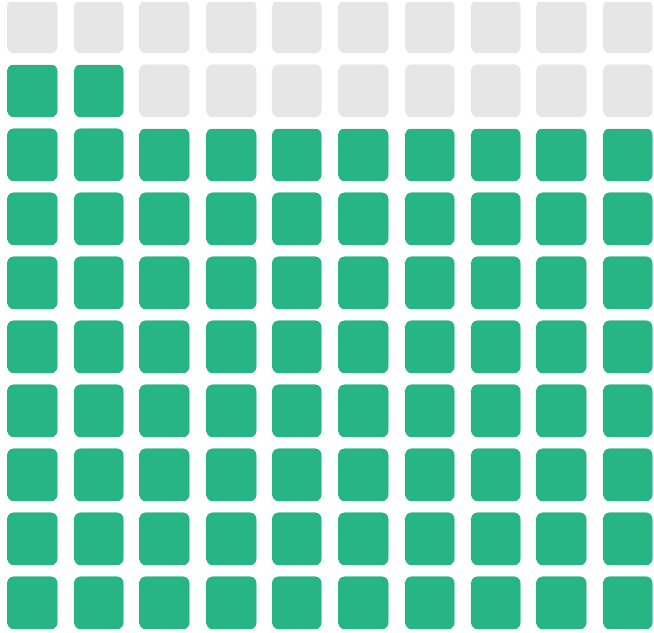


3 January 2024 report. Chart is based on the most recent train journey made within seven days of being surveyed. Base size: all rail users, average of 299 per survey. All leisure includes: leisure/eating out/non-essential shopping; essential shopping; and friends/family.

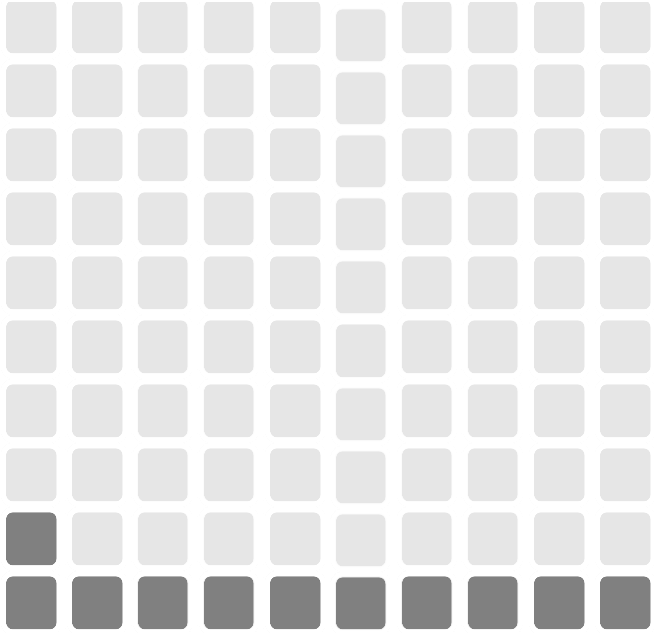
Rail satisfaction



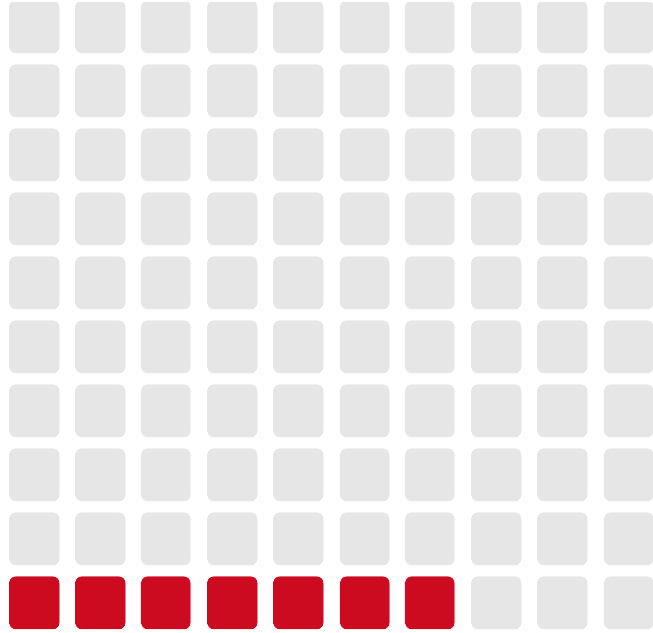
Overall satisfaction with rail journey



82%
satisfied



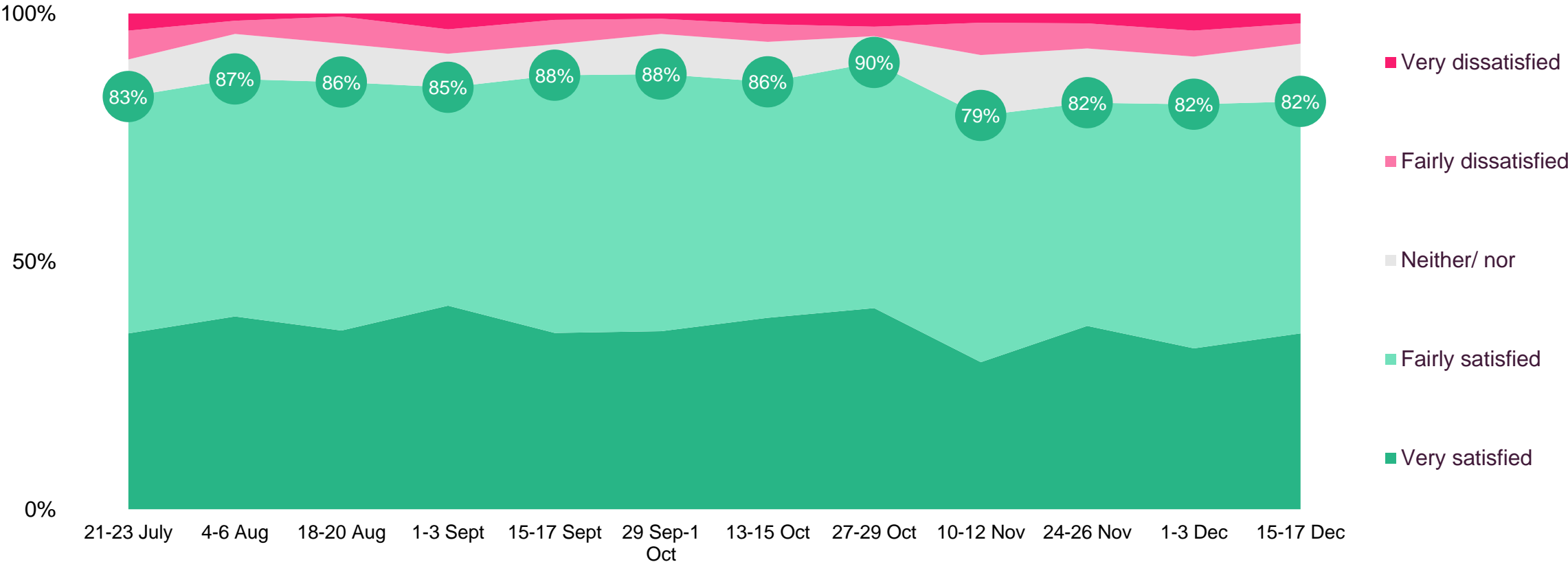
11%
neither/nor



7%
dissatisfied

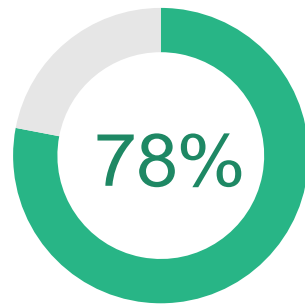
3 January 2024 report. Satisfaction questions are based on the most recent train journey made within seven days of being surveyed. Charts show average of the two surveys conducted in the last four weeks. Base size: 681.

Overall satisfaction with rail journey

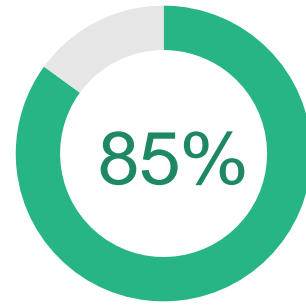


3 January 2024 report. Satisfaction questions are based on the most recent train journey made within seven days of being surveyed. Base sizes range from 251 to 370

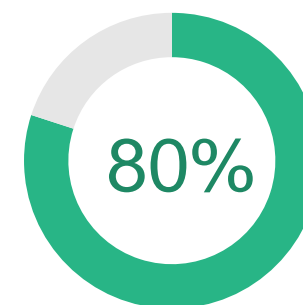
Overall satisfaction by journey purpose, gender and age



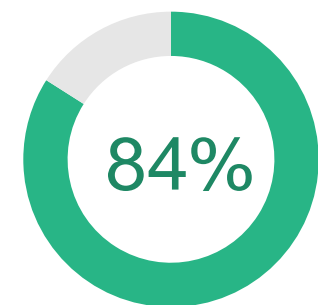
Commute



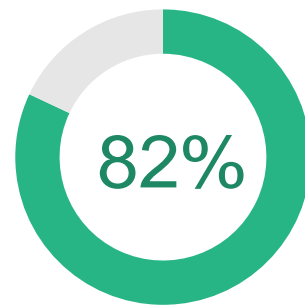
All leisure



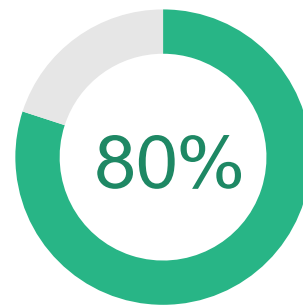
Men



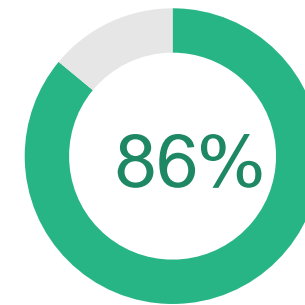
Women



Aged 18-34



Aged 35-54

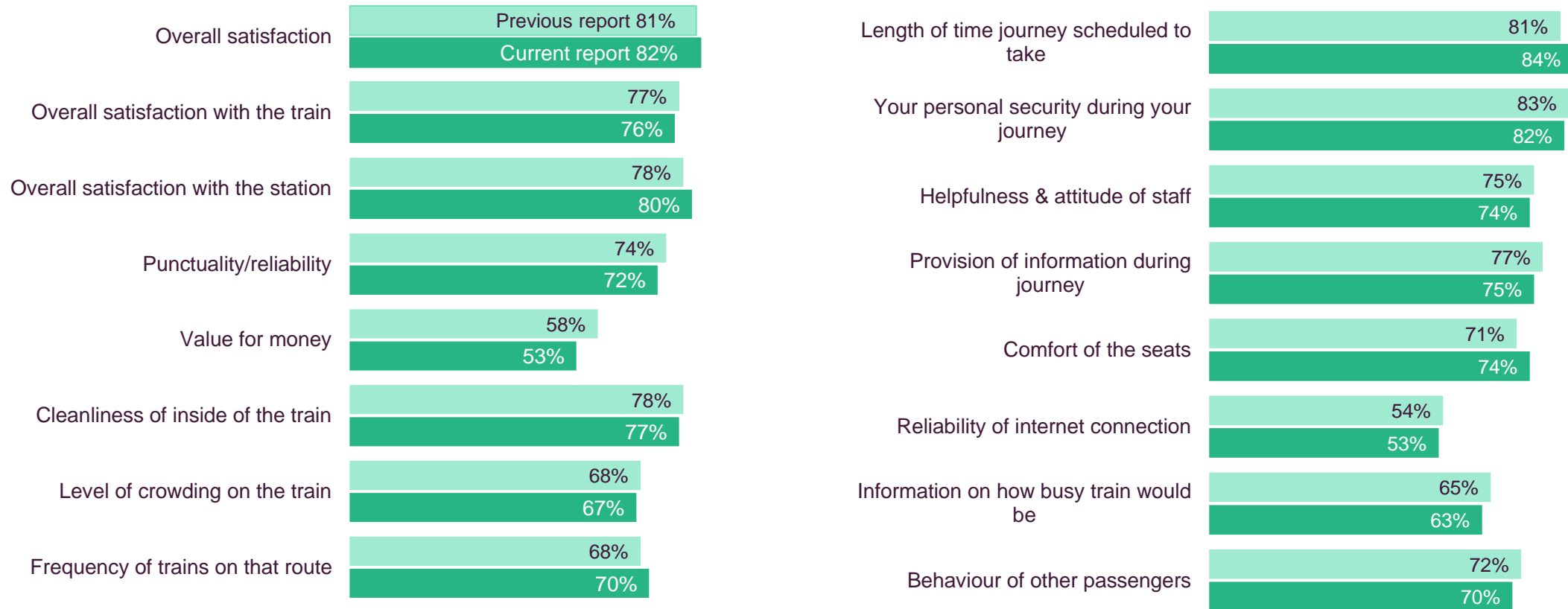


Aged 55 and over

3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Charts show average of the two surveys conducted in the last four weeks. Base sizes vary by chart ranging between 161 and 371 'All leisure' combines answers from 'Leisure/eating out/non-essential shopping', 'Visiting friends/family' and 'Essential shopping'.

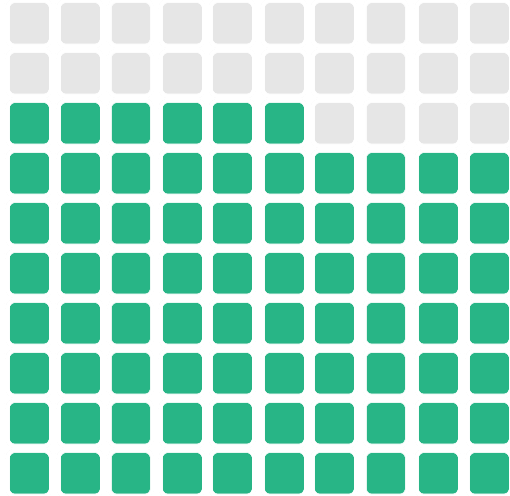
Satisfaction with aspects of rail journey

Change in satisfaction levels since last report

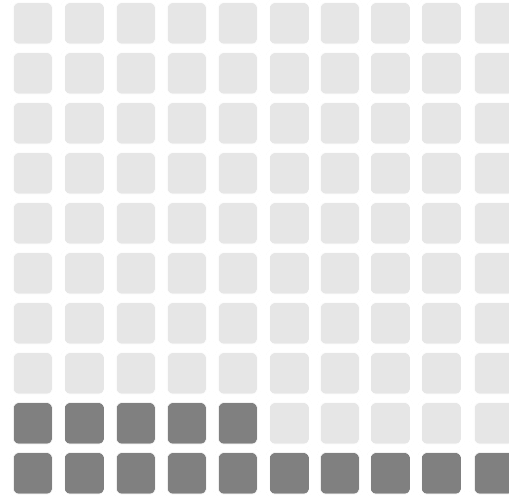


3 January 2024 report. Satisfaction questions are based on the most recent train journey made within seven days of being surveyed. The 'current report' satisfaction values are the average of the two surveys conducted in the last four weeks; the 'previous report' values are the average of the two surveys conducted in the previous four weeks. Base sizes per aspect vary; current report from 507 to 681, and previous report from 487 to 662.

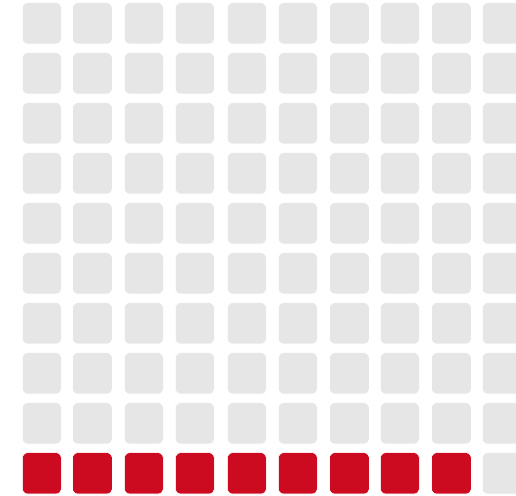
Satisfaction with the train overall



76%
satisfied



15%
neither/nor

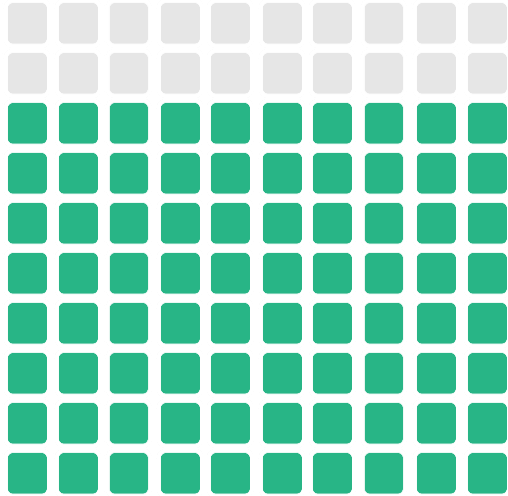


9%
dissatisfied

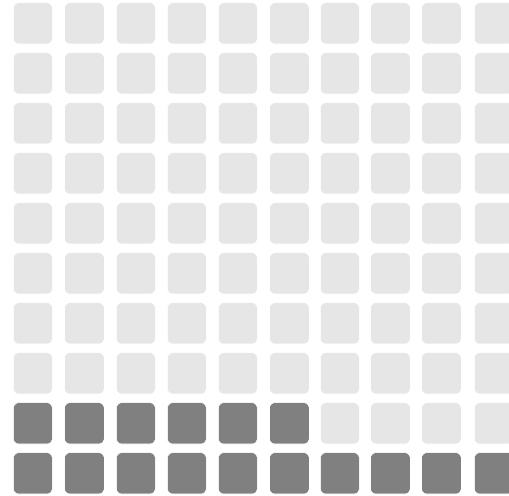


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 680; trend chart range from 250 to 370 per survey.

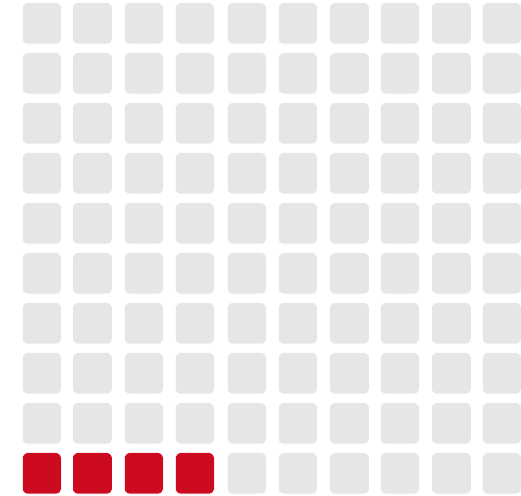
Overall satisfaction with the station



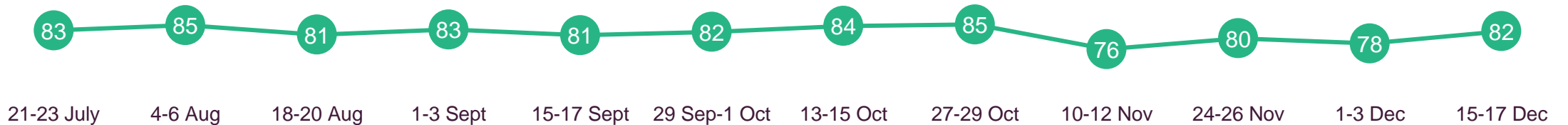
80%
satisfied



16%
neither/nor

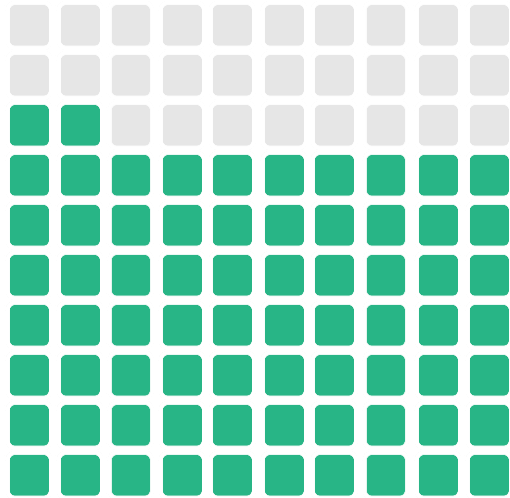


4%
dissatisfied

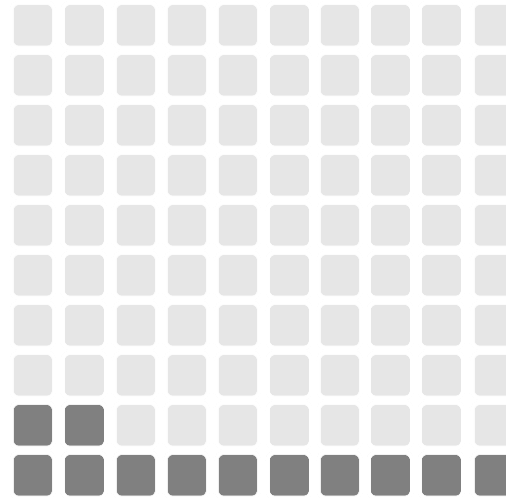


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 680; trend chart range from 250 to 370 per survey.

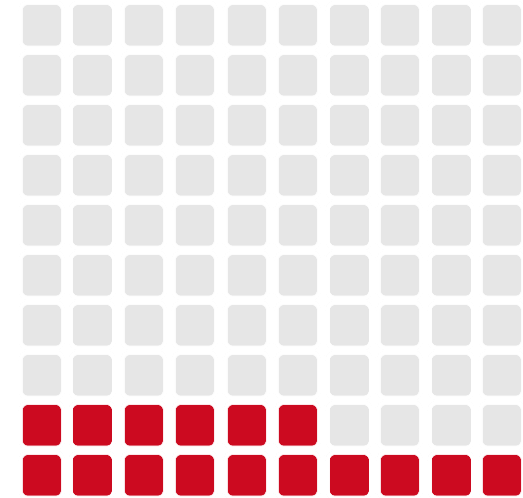
Satisfaction with punctuality/reliability



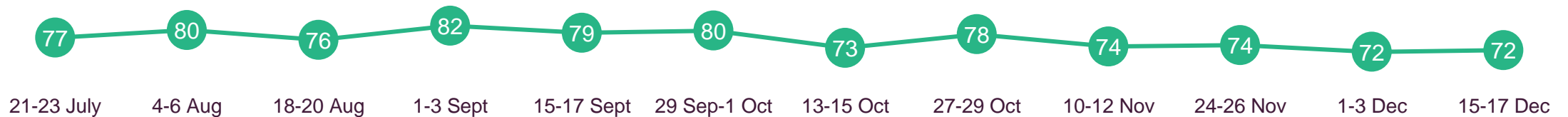
72%
satisfied



12%
neither/nor

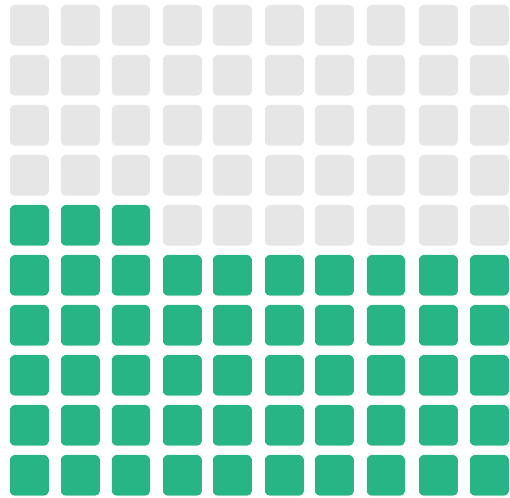


16%
dissatisfied

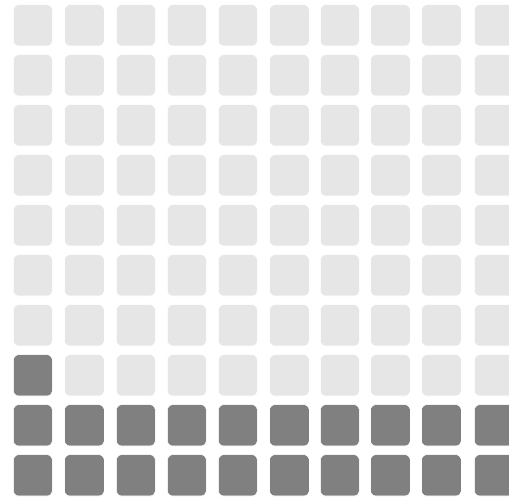


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 679; trend chart range from 251 to 369 per survey.

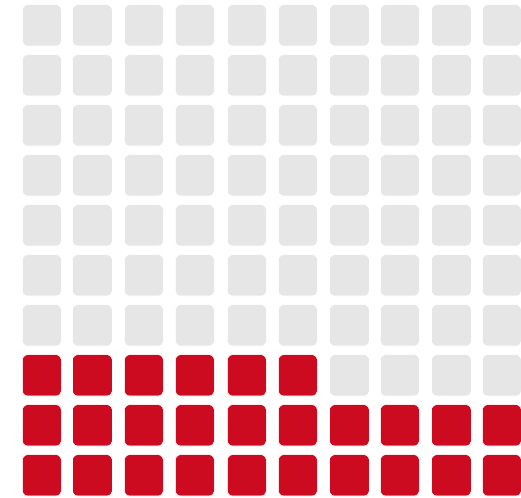
Satisfaction with value for money



53%
satisfied



21%
neither/nor

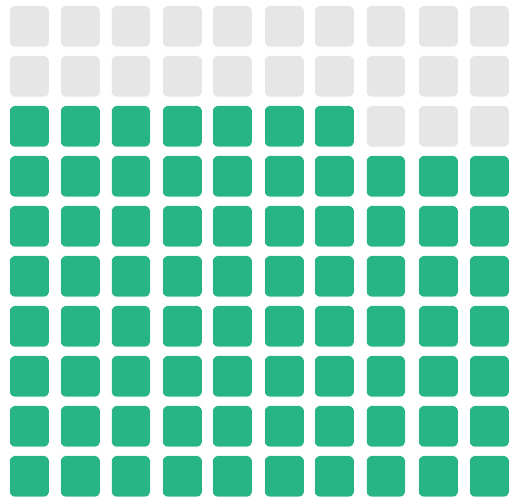


26%
dissatisfied

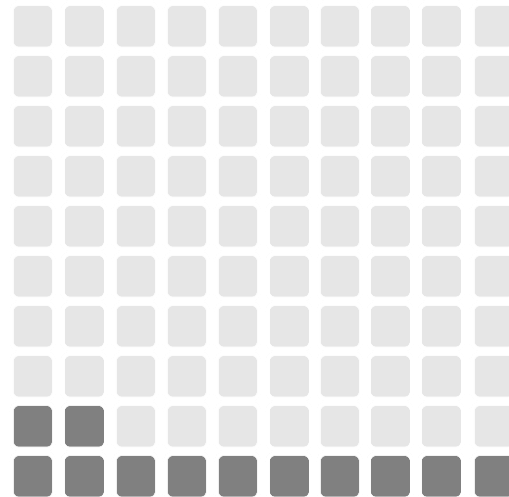


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 665; trend chart range from 245 to 364 per survey.

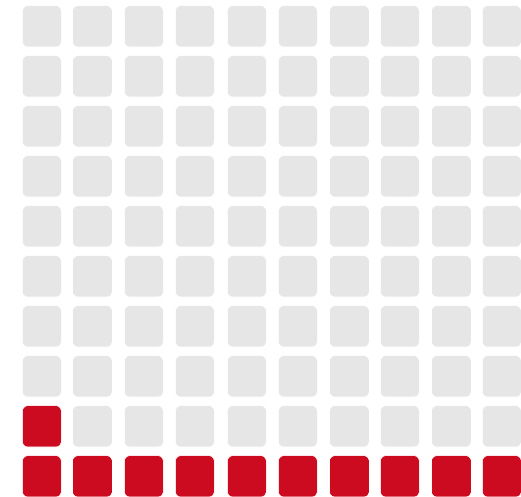
Satisfaction with cleanliness of the inside of the train



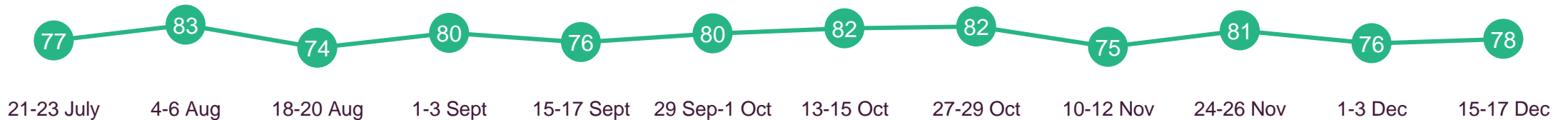
77%
satisfied



12%
neither/nor

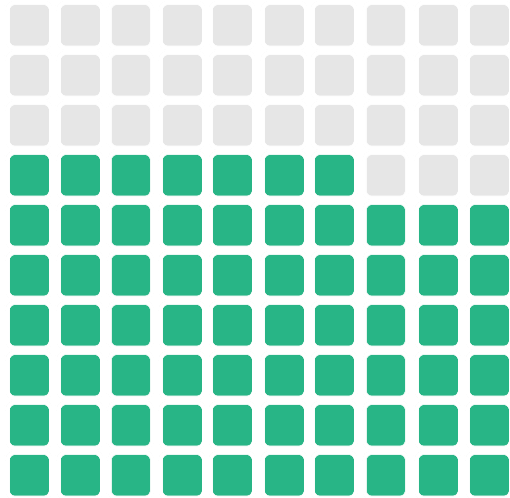


11%
dissatisfied

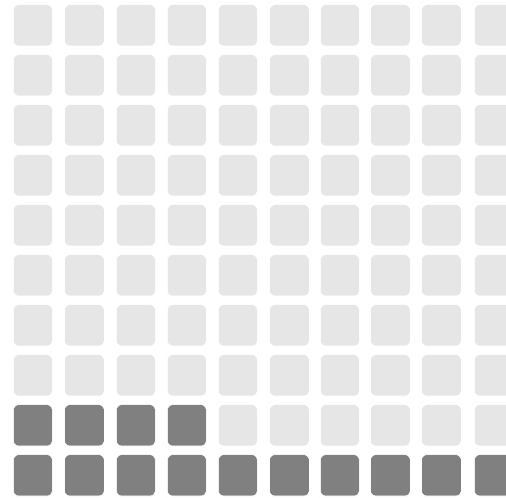


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 678; trend chart range from 250 to 368 per survey.

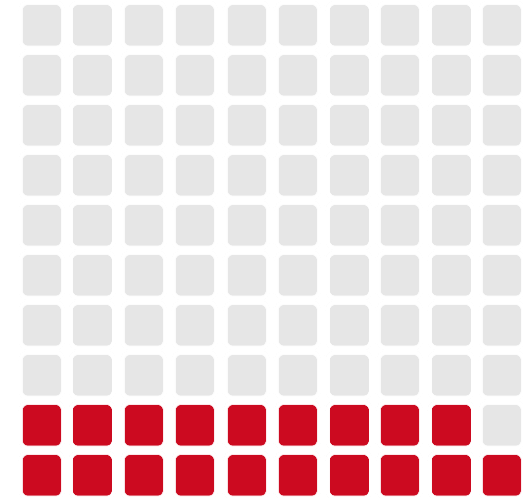
Satisfaction with level of crowding



67%
satisfied



14%
neither/nor

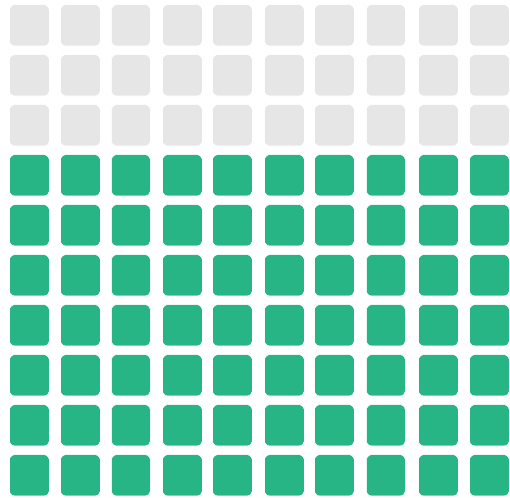


19%
dissatisfied

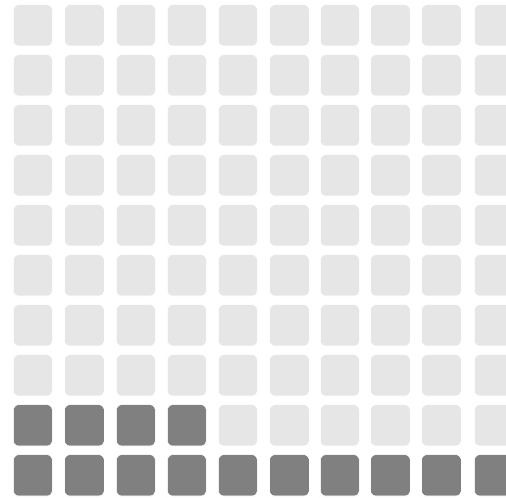


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 677; trend chart range from 251 to 368 per survey.

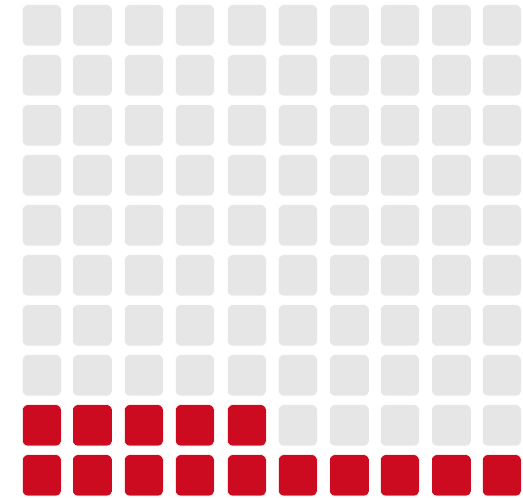
Satisfaction with frequency of trains on that route



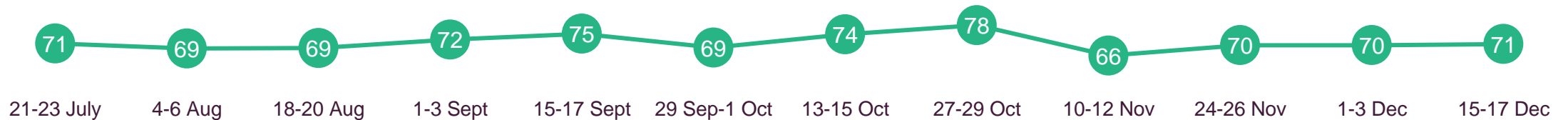
70%
satisfied



14%
neither/nor

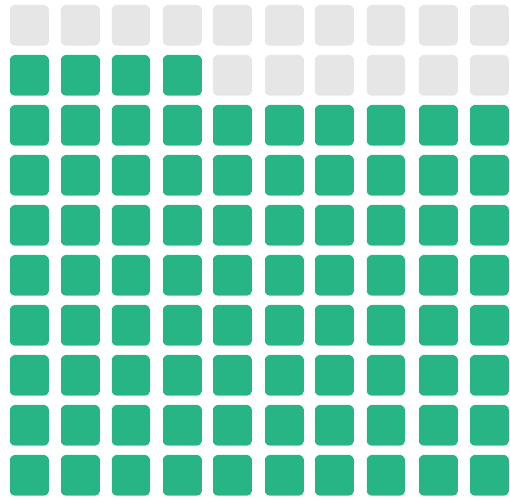


15%
dissatisfied

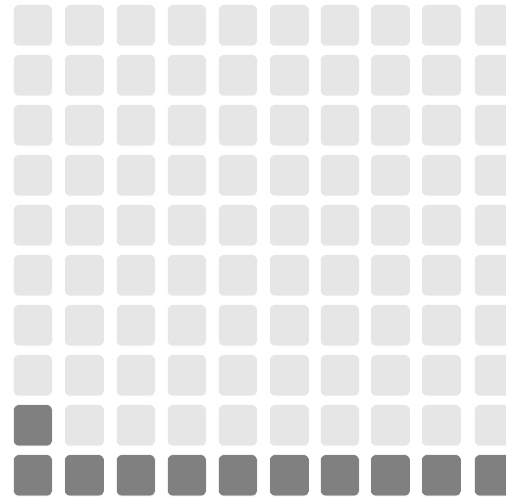


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 674; trend chart range from 251 to 365 per survey.

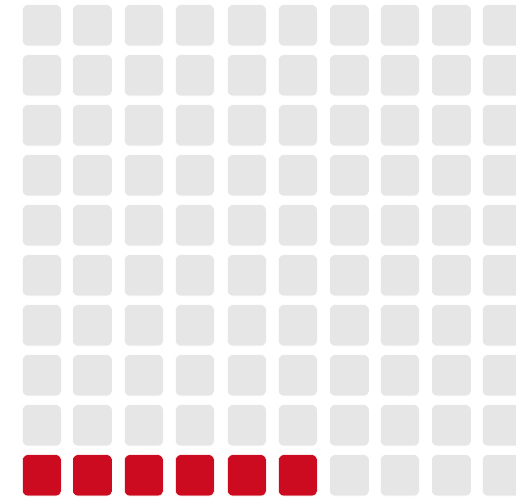
Satisfaction with scheduled journey time



84%
satisfied



11%
neither/nor

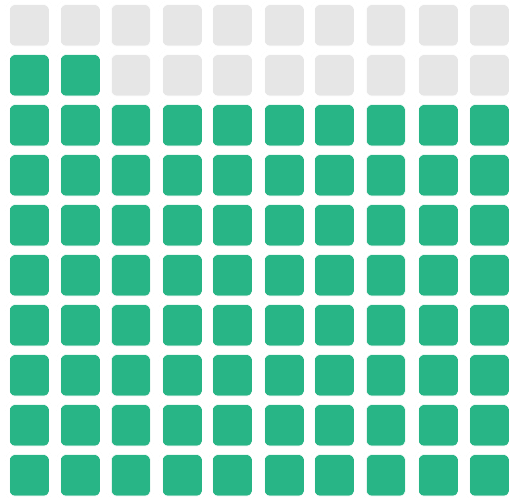


6%
dissatisfied

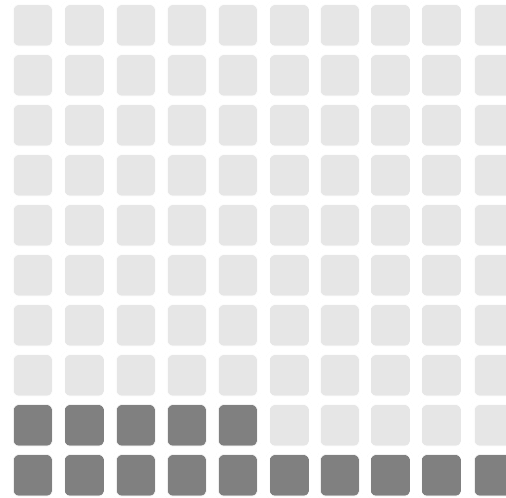


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 680; trend chart range from 251 to 370 per survey.

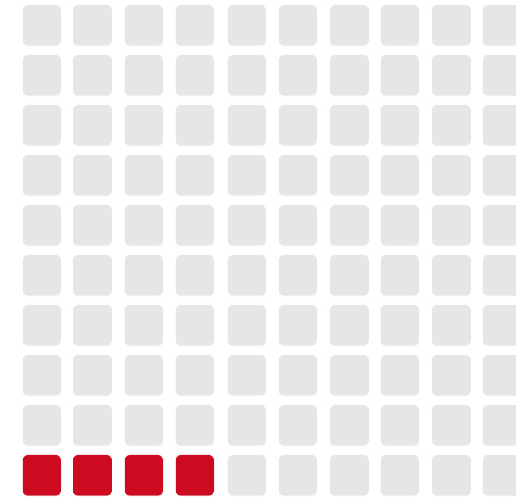
Satisfaction with personal security



82%
satisfied



15%
neither/nor

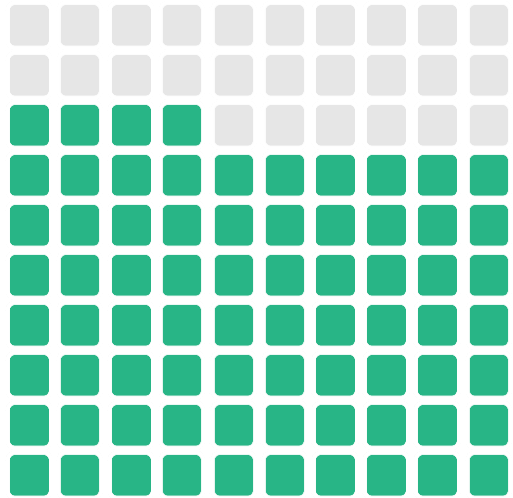


4%
dissatisfied

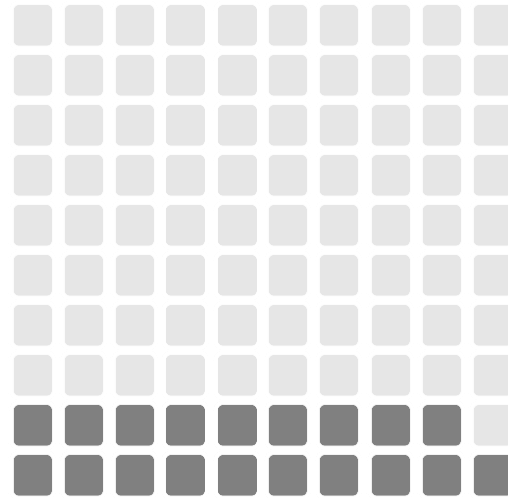


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 678; trend chart range from 249 to 368 per survey.

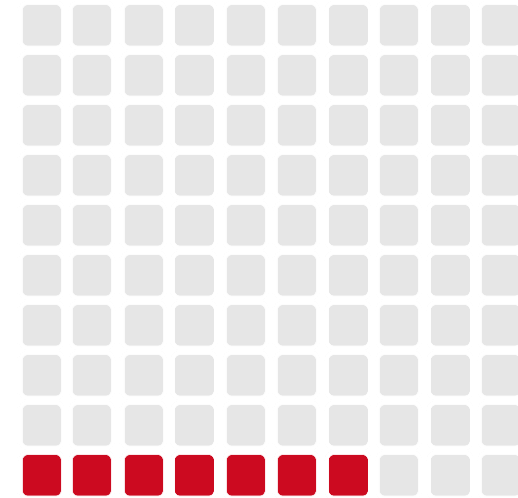
Satisfaction with helpfulness and attitude of staff



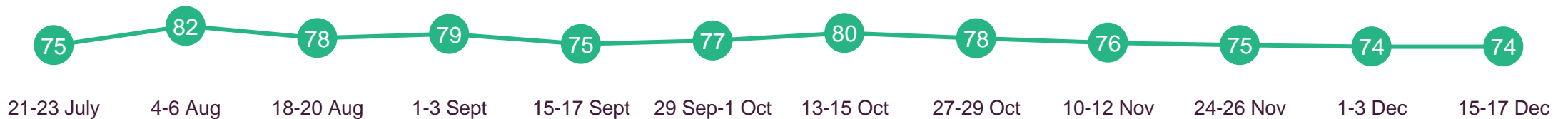
74%
satisfied



19%
neither/nor

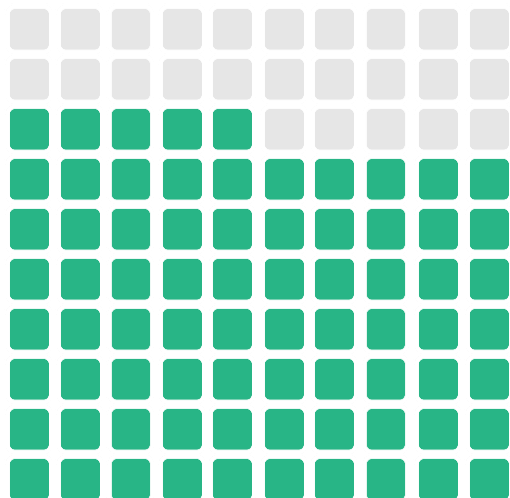


7%
dissatisfied

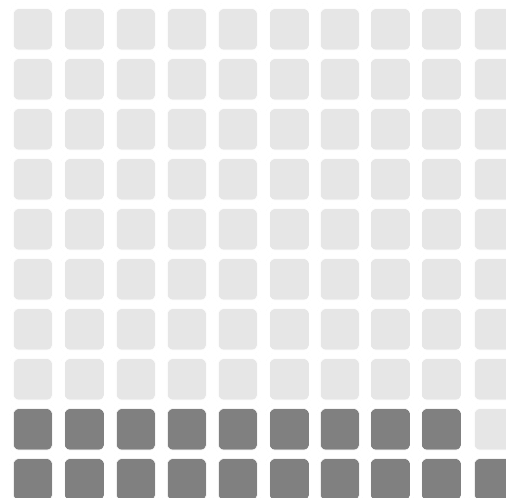


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 553; trend chart range from 191 to 295 per survey.

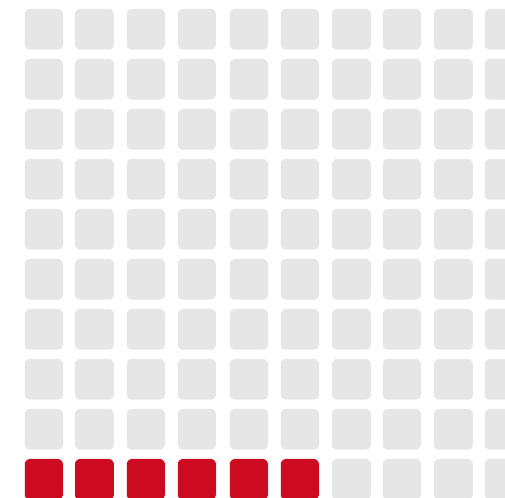
Satisfaction with information provided during the journey



75%
satisfied



19%
neither/nor

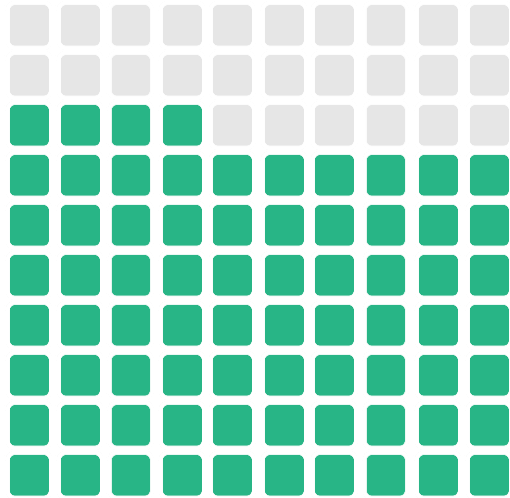


6%
dissatisfied

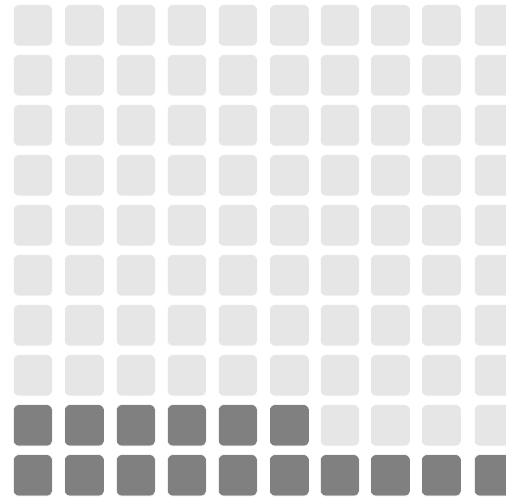


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 654; trend chart range from 240 to 353 per survey.

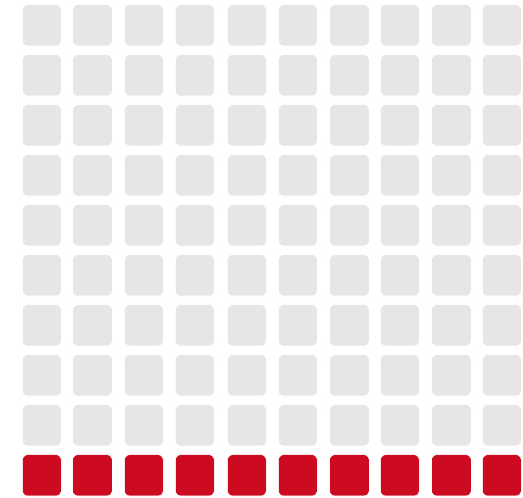
Satisfaction with comfort of the seats



74%
satisfied



16%
neither/nor

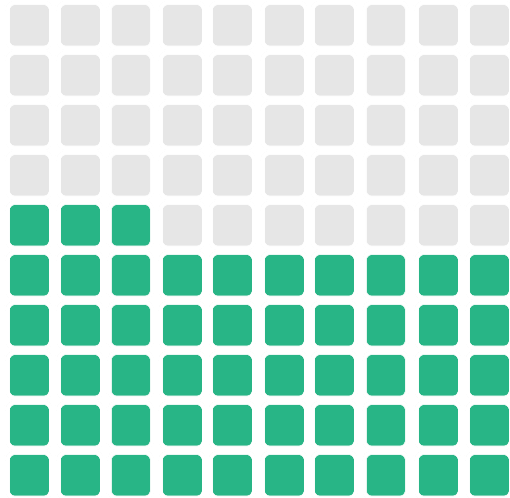


10%
dissatisfied

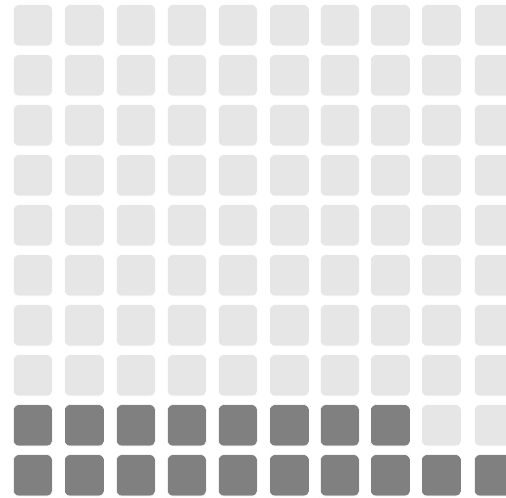


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 659; trend chart range from 247 to 360 per survey.

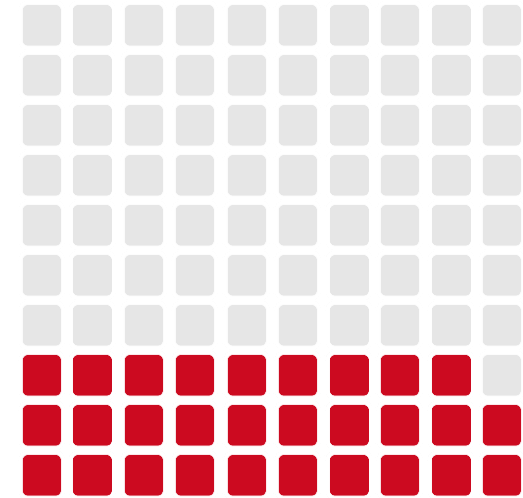
Satisfaction with reliability of the internet



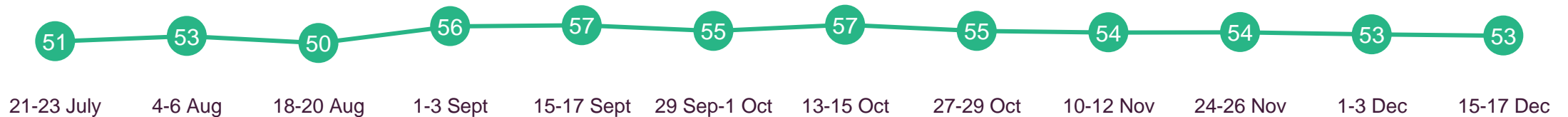
53%
satisfied



18%
neither/nor

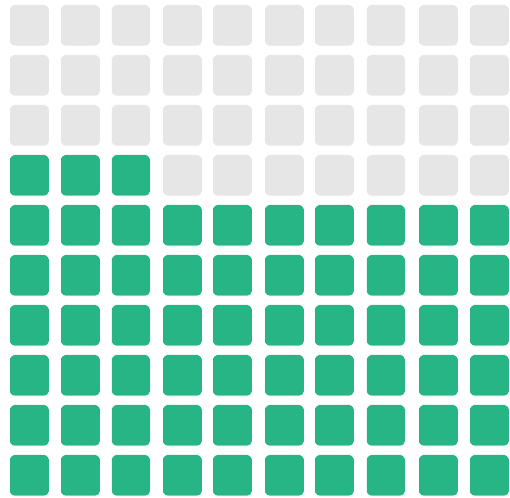


29%
dissatisfied

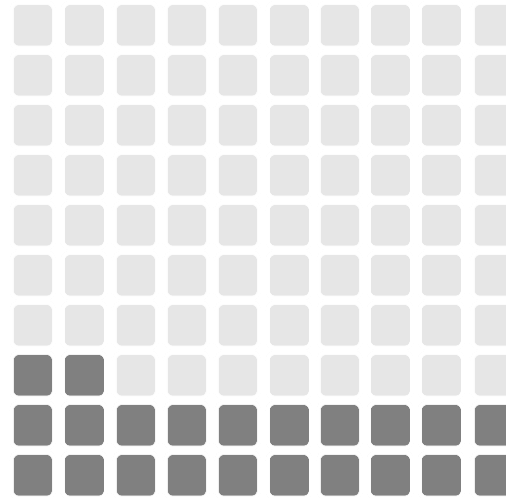


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 507; trend chart range from 180 to 275 per survey.

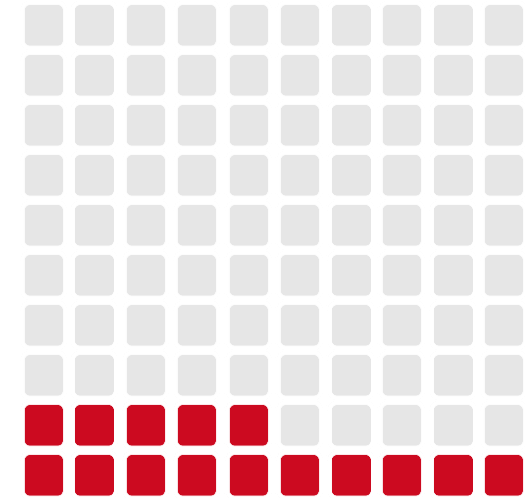
Satisfaction with information on how busy the train was before travelling



63%
satisfied



22%
neither/nor

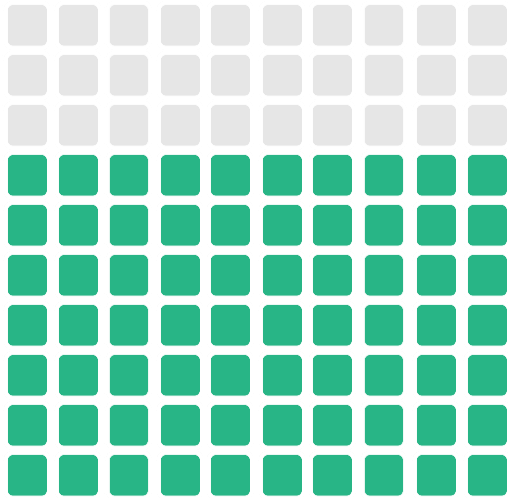


15%
dissatisfied

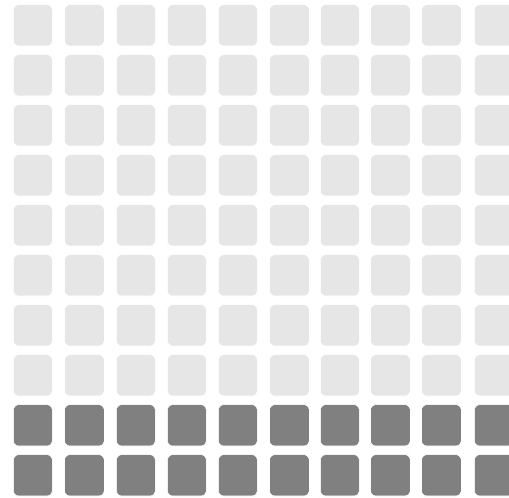


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 580; trend chart range from 205 to 315 per survey.

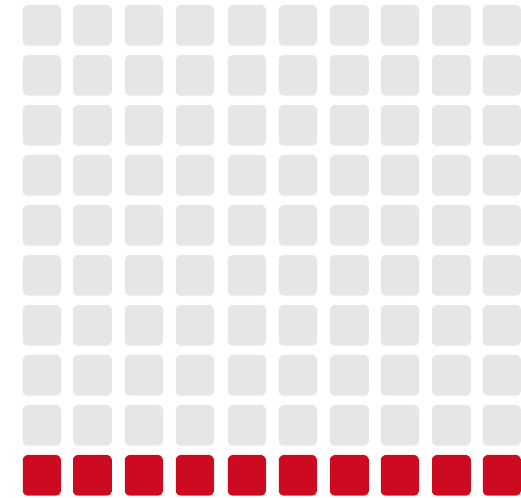
Satisfaction with other passengers' behaviour



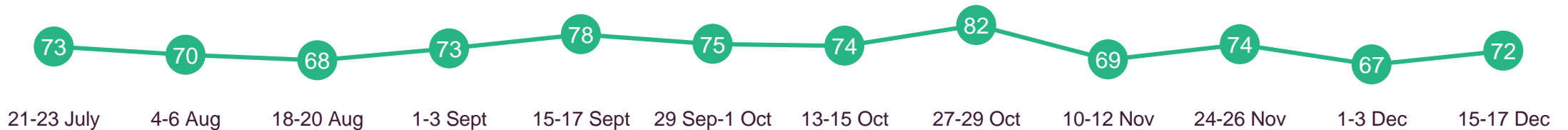
70%
satisfied



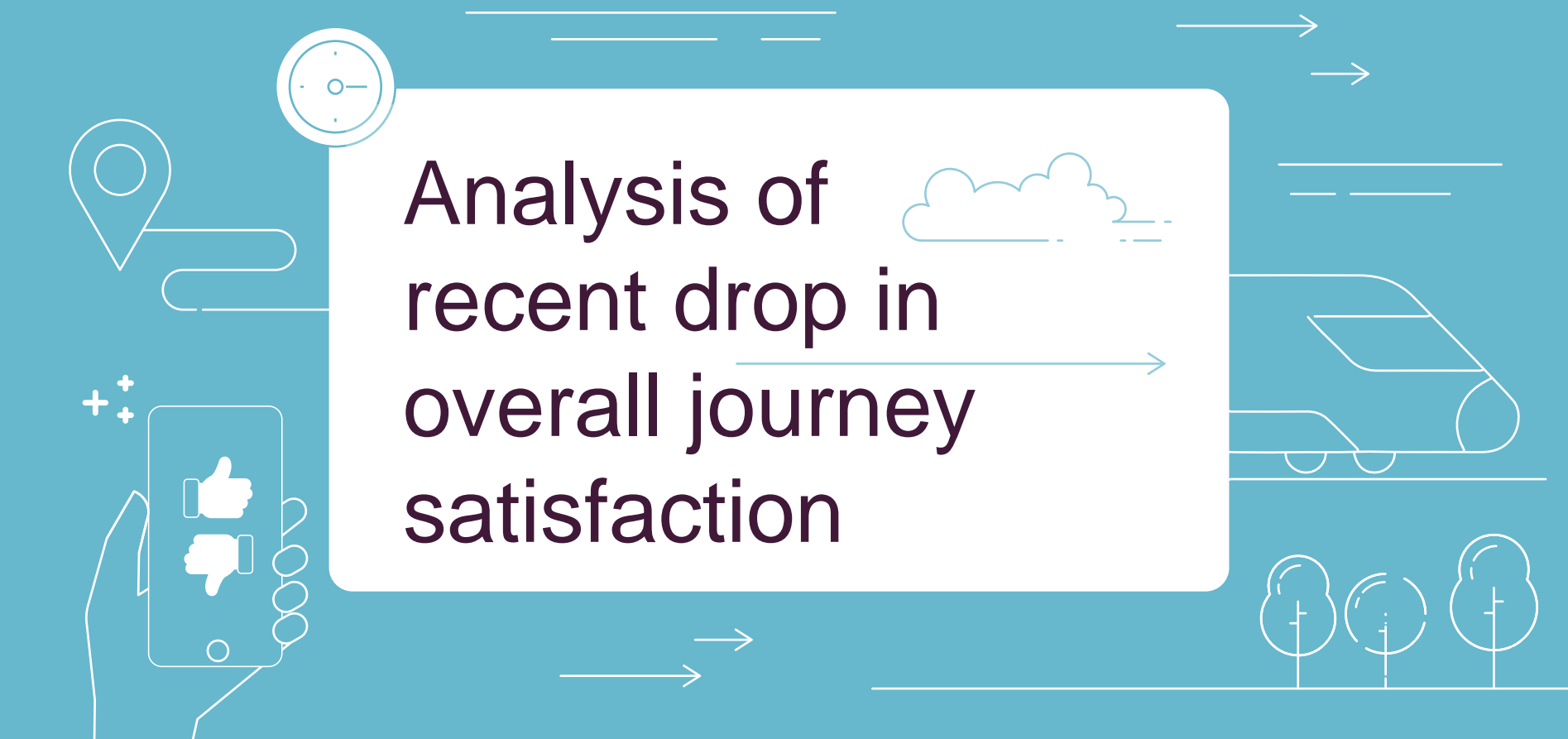
20%
neither/nor



10%
dissatisfied

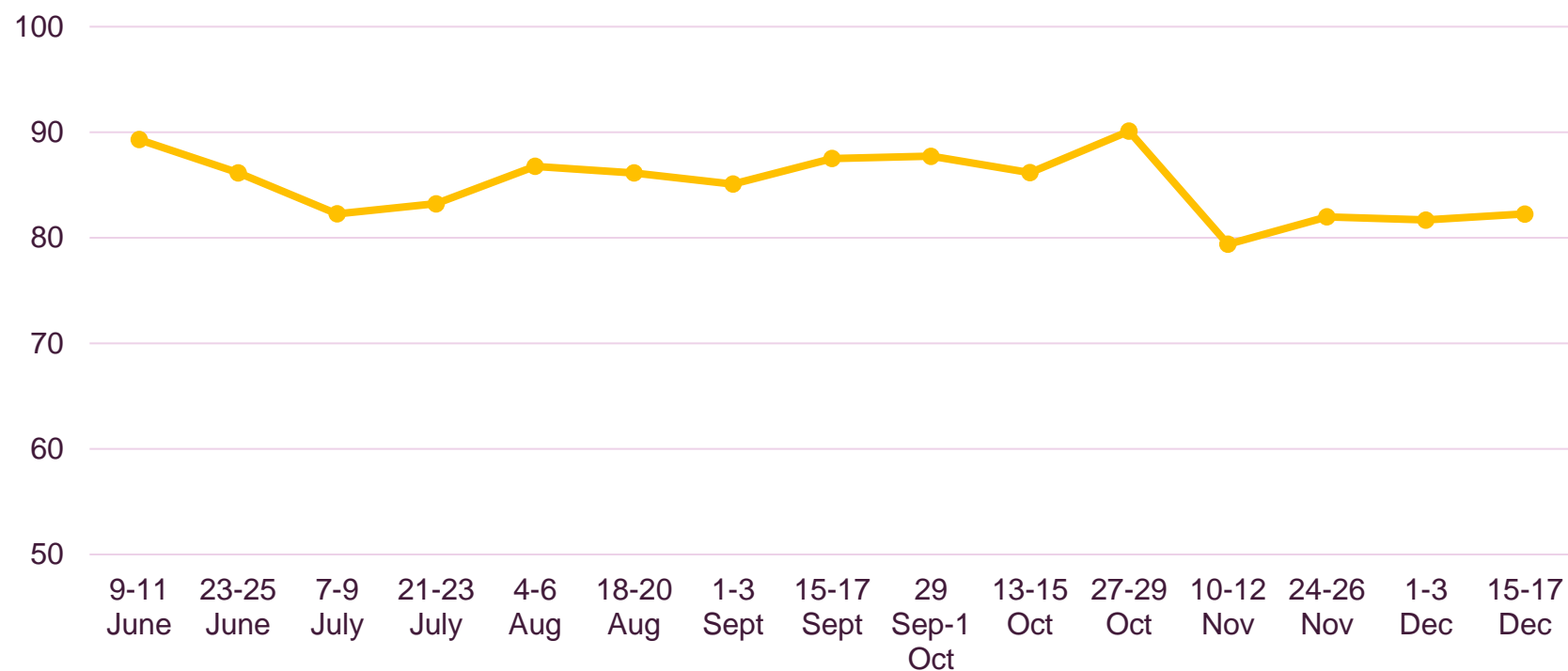


3 January 2024 report. Satisfaction questions are based on the most recent rail journey made within seven days of being surveyed. Square charts show average of the two surveys conducted in the last four weeks. Base sizes: square charts 674; trend chart range from 251 to 368 per survey.



Analysis of recent drop in overall journey satisfaction

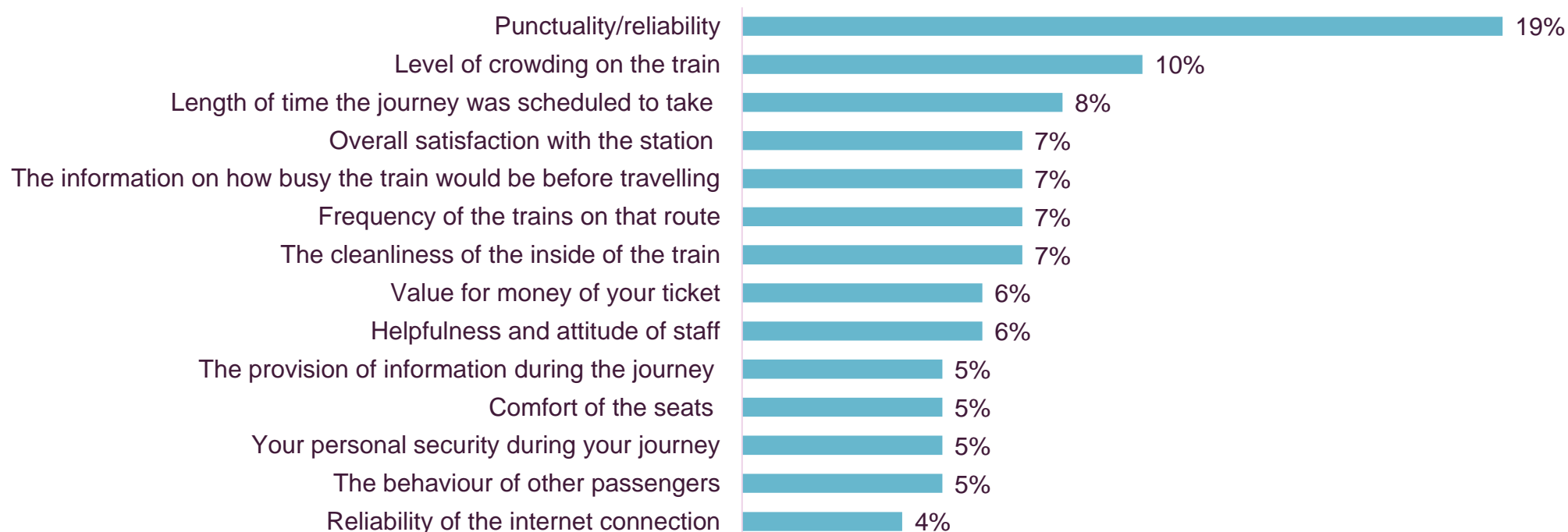
Overall satisfaction since October this year is lower



— Overall satisfaction with that (rail) journey

Our *Rail passenger satisfaction – key driver analysis** showed satisfaction with ‘punctuality’ and ‘level of crowding’ most important for overall journey satisfaction

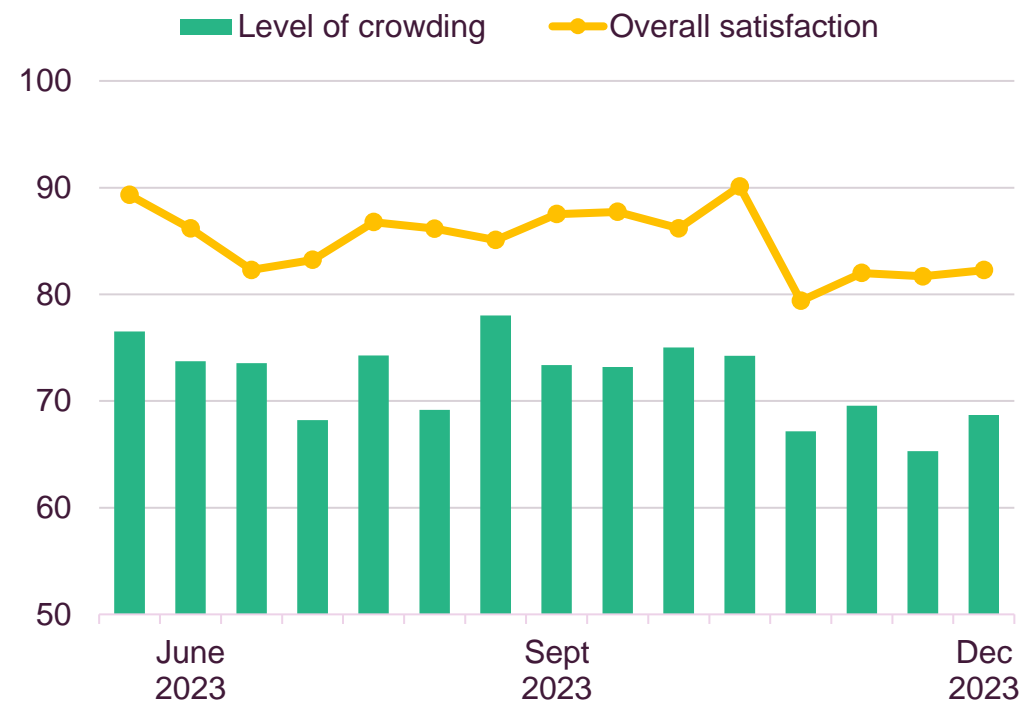
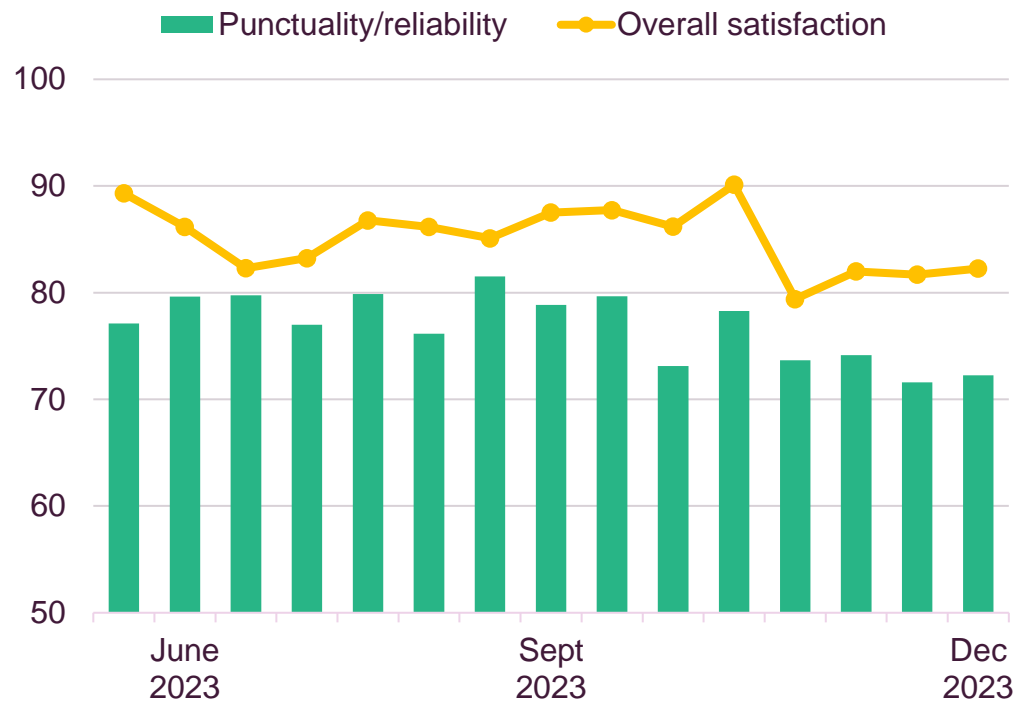
Share of importance to overall satisfaction with journey



* Based analysis of survey results between July 2022 and January 2023. Report issued February 2023:
<https://www.transportfocus.org.uk/gd/publication/rail-passenger-satisfaction-key-driver-analysis/>

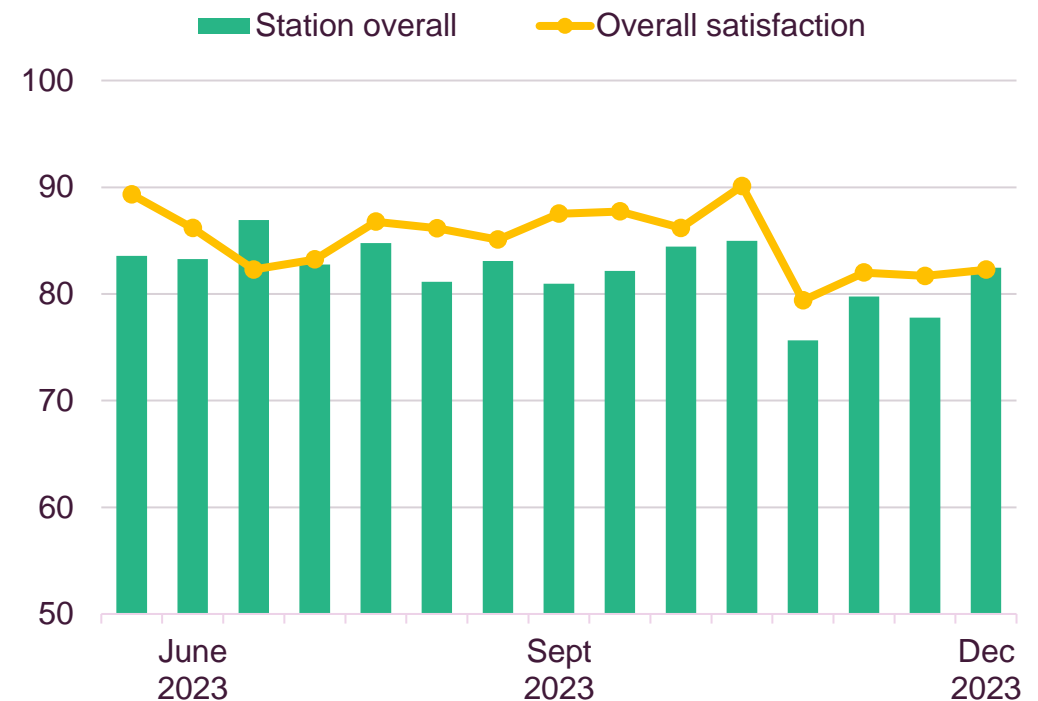
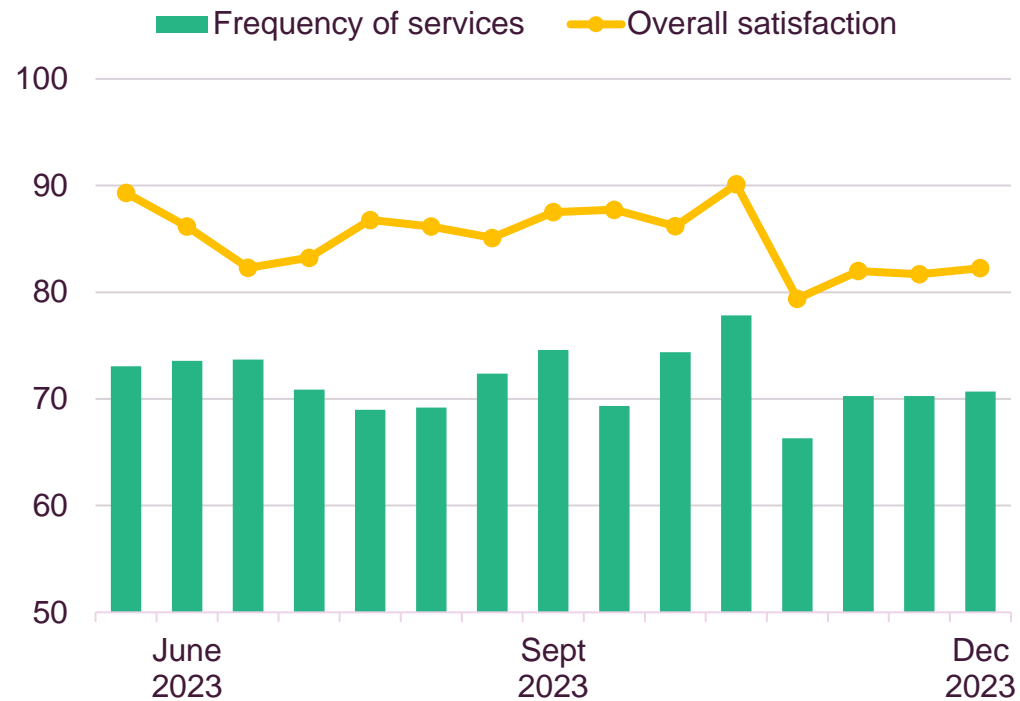
The two aspects of most importance for overall satisfaction have dipped in the last four weeks - punctuality and level of crowding

Satisfaction levels each survey wave over the last six months




Two of the next four aspects important for satisfaction have also markedly dropped in recent weeks - frequency of services and station overall

Satisfaction levels each survey wave over the last six months

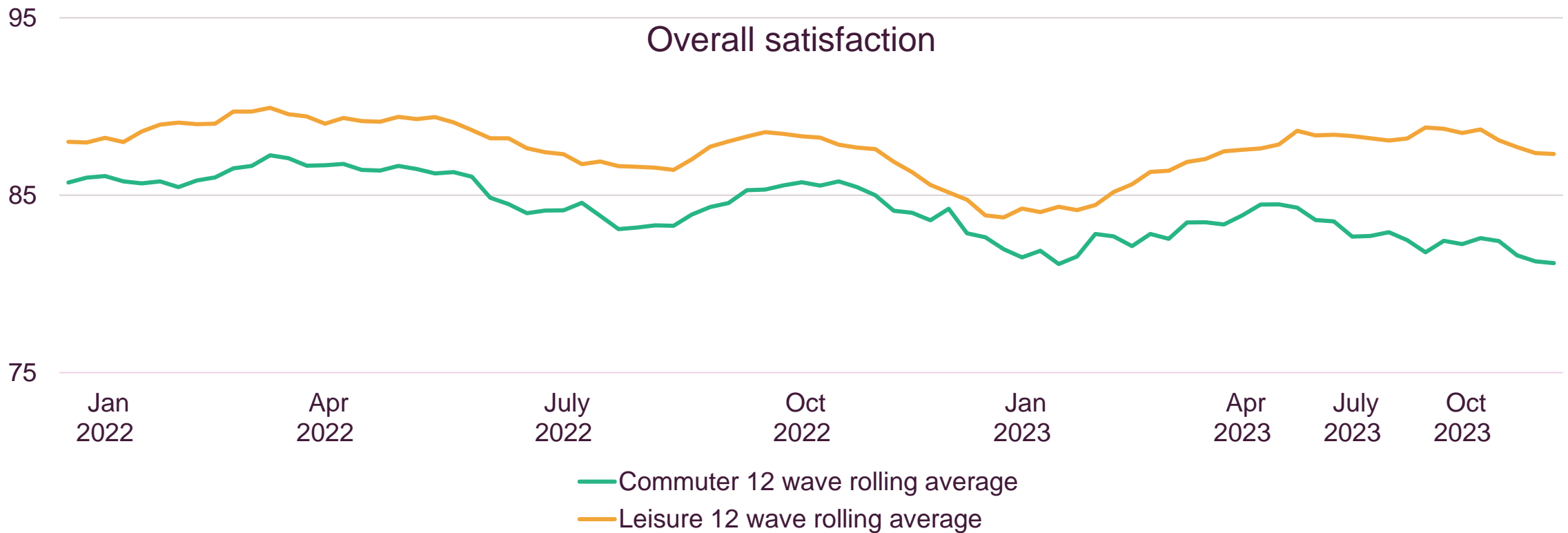


The other two of the six most important aspects driving overall satisfaction ('length of time journey schedule to take' and 'information on how busy the train would be before travelling') have not changed in the same way.



Commuter and leisure satisfaction gap is widening in the last six months

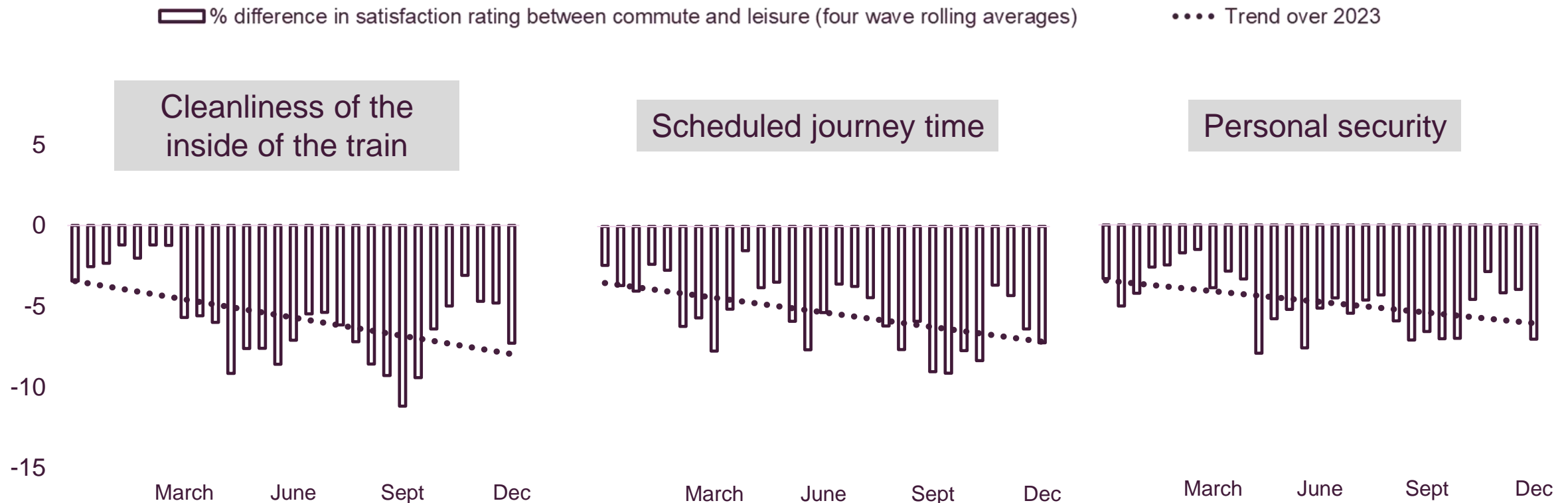
During 2023 the gap in satisfaction between commuter and leisure has increased



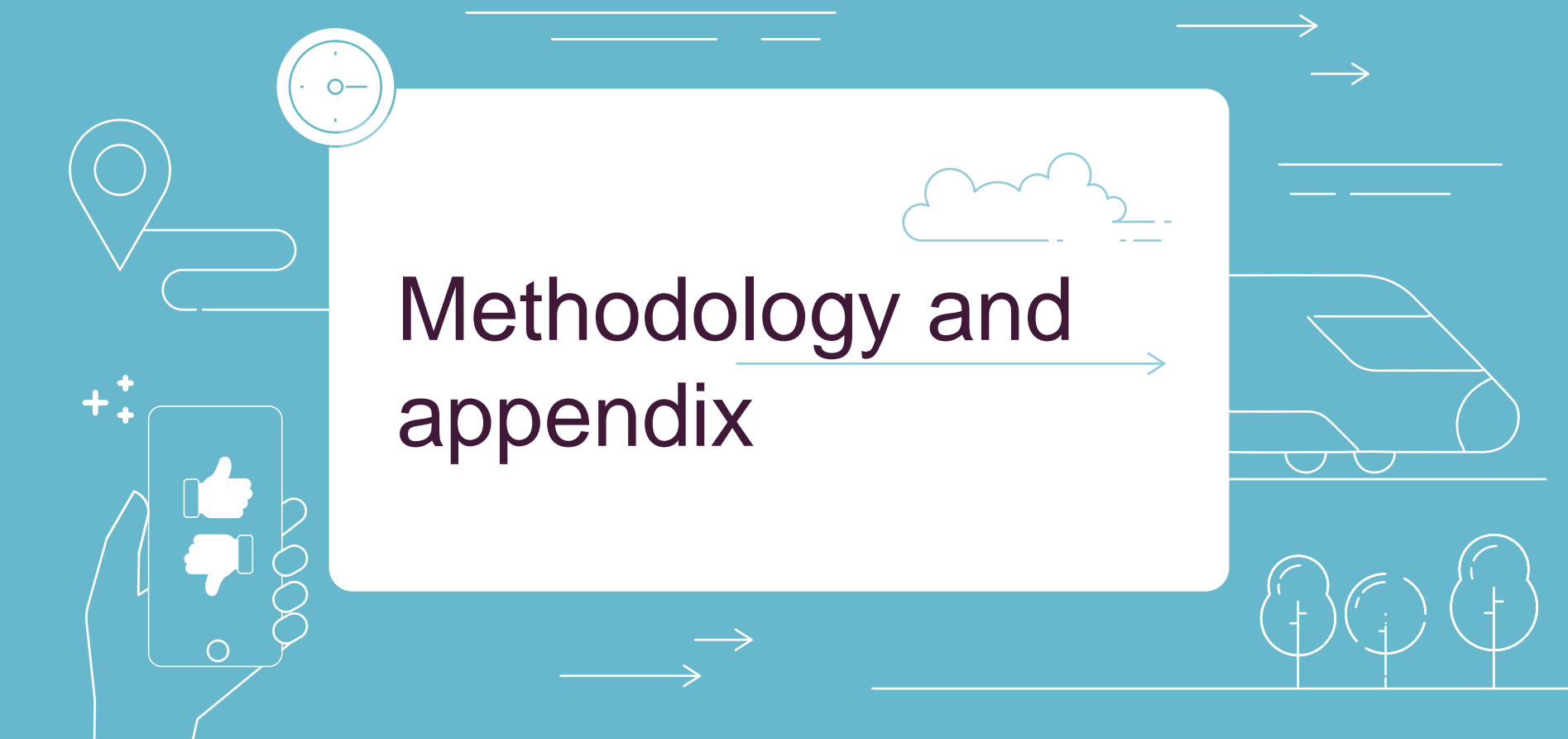
Leisure includes these answer options: a) leisure/eating out/non-essential shopping; b) essential shopping; and c) visiting friends or relatives
3 January 2024 report.

Differences in satisfaction between commuters and leisure for three journey aspects have particularly widened over 2023

For other aspects, there has either been a consistent gap between journey types throughout, or there is no gap or pattern



Leisure includes these answer options: a) leisure/eating out/non-essential shopping; b) essential shopping; and c) visiting friends or relatives
3 January 2024 report.



Methodology and appendix

Methodology

Transport Focus's Rail User Survey runs every other weekend in Yonder Consulting's omnibus. In total approximately 2000 people per survey are screened to identify those who have made a rail journey (excluding London Underground) in the last seven days and the purpose of the journey. Users then answer questions about satisfaction with their journey. The total number of rail users we spoke to each week is shown in the table opposite with the dates of fieldwork. We report results every four weeks.

Yonder Consulting's omnibus is weighted to be nationally representative of the population of Great Britain. The analysis of satisfaction questions excludes those who say that the question is not applicable. The questions asked are on the next slide. The omnibus survey asks questions about a variety of matters from a range of client organisations. Not all those interviewed

through Yonder Consulting's omnibus are passengers on public transport. Numbers may not add up to 100 per cent, due to rounding.

Key drivers of overall journey satisfaction approach used Johnson's Relative Weights; a regression method that quantifies the importance of predictor variables, these being the 14 attributes of journey experience (satisfaction with the train over was omitted as it summarises many of the fifteen measures in the survey).

The analysis was produced by Yonder Consulting. The model R squared value is 0.55. Further details are in the Feb 2023 key drivers of satisfaction publication:

<https://www.transportfocus.org.uk/gd/publication/rail-passenger-satisfaction-key-driver-analysis/>

	2023 Fieldwork dates	Response numbers
Wave 85	21-23 July	268
Wave 86	4-6 August	271
Wave 87	18-20 August	266
Wave 88	1-3 September	251
Wave 89	15-17 September	333
Wave 90	29 Sept - 1 Oct	267
Wave 91	13-15 October	300
Wave 92	27-29 October	297
Wave 93	10-12 November	331
Wave 94	24-26 November	331
Wave 95	1-3 December	311
Wave 96	15-17 December	370

Appendix: survey question text

Q. Individual satisfaction measures: Thinking about this most recent journey you made by train, how satisfied or dissatisfied were you with? Scale: Very satisfied to Very dissatisfied and Not applicable (except overall satisfaction).

- a. This train journey overall
- b. The information on how busy the train would be before travelling
- c. The cleanliness of the inside of the train
- d. Helpfulness and attitude of staff
- e. Overall satisfaction with the station
- f. Punctuality/reliability (i.e. the train departing / arriving on time)
- g. Frequency of the trains on that route
- h. Length of time the journey was scheduled to take
- i. Level of crowding on the train
- j. The behaviour of other passengers
- k. Provision of information during the journey
- l. Comfort of the seats
- m. Value for money of your ticket
- n. Reliability of the internet connection
- o. Overall satisfaction with the train
- p. Your personal security during your journey.

Contact Transport Focus

Any enquiries about this report should be addressed to:

Murray Leader

Senior insight adviser

Murray.Leader@transportfocus.org.uk

Transport Focus

Albany House

94 - 98 Petty France

London

SW1H 9EA

www.transportfocus.org.uk

Transport Focus is the operating name of the Passengers' Council

Transport Focus is the independent consumer organisation representing the interests of:

- rail passengers in Great Britain
- bus, coach and tram users across England outside London
- all users of England's motorways and major 'A' roads (the Strategic Road Network).

We work to make a difference for all transport users.

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