

### Introduction



Our Rail User Survey regularly asks a representative sample of 2000 people across Great Britain about their public transport use. Those who used rail in the last seven days are asked about their overall satisfaction with their most recent rail journey and with aspects such as value for money, punctuality and cleanliness.

#### This report shows:

 The results for the main 22 train companies on overall satisfaction and satisfaction with six key aspects of the journey. The results are for the most recent 24 waves of the survey (24 March 2023 to 4 Feb 2024).  Trends in overall satisfaction and satisfaction with the same six key aspects for 15 train companies with sufficient response numbers. These trends are shown for consecutive 12 waves of the survey.

Our Rail User Survey is also used to produce the <u>reports</u> we publish every four weeks showing how satisfied passengers in Great Britain were with their most recent train journey.

Further details about the methodology and the sample sizes for each train operating company are at the end of the report.







### Summary of satisfaction by train company

	Overall satisfaction	Punctuality / reliability	Frequency of trains on route	Level of crowding	Cleanliness	Information during journey	Value for money
Avanti West Coast	85	69	71	71	81	76	59
c2c	91	83	77	78	78	80	52
Chiltern Railways	84	86	79	76	86	78	65
CrossCountry	75	72	63	60	74	69	62
East Midlands Railway	83	79	73	69	78	77	55
Great Northern	92	82	70	80	77	85	59
Great Western Railway	84	74	76	71	83	76	57
Greater Anglia	88	87	75	76	90	82	50
London North Eastern Railway	88	81	79	73	82	84	69
London Northwestern Railway	80	76	73	65	67	72	63
London Overground	92	84	80	78	84	85	73
Merseyrail	91	88	90	84	84	84	72
Northern	84	70	67	73	79	77	63
ScotRail	89	83	75	82	80	80	64
South Western Railway	84	76	68	69	74	77	48
Southeastern	87	81	70	74	79	81	53
Southern	80	73	68	71	71	74	47
Elizabeth Line	91	82	83	76	86	85	66
Thameslink	88	75	67	73	80	76	50
TransPennine Express	78	70	58	62	74	71	59
Transport for Wales	74	63	62	64	75	74	52
West Midlands Railway	85	75	74	74	76	72	61

Score relatively high compared with other TOCS

Score relatively average compared with other TOCS

Score relatively low compared with other TOCS



### Overall journey satisfaction by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

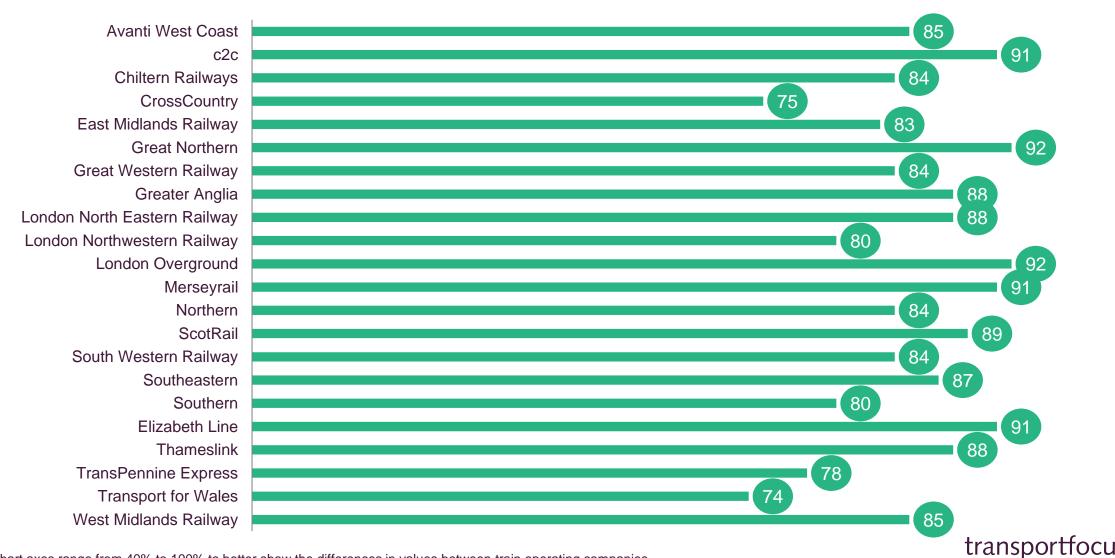
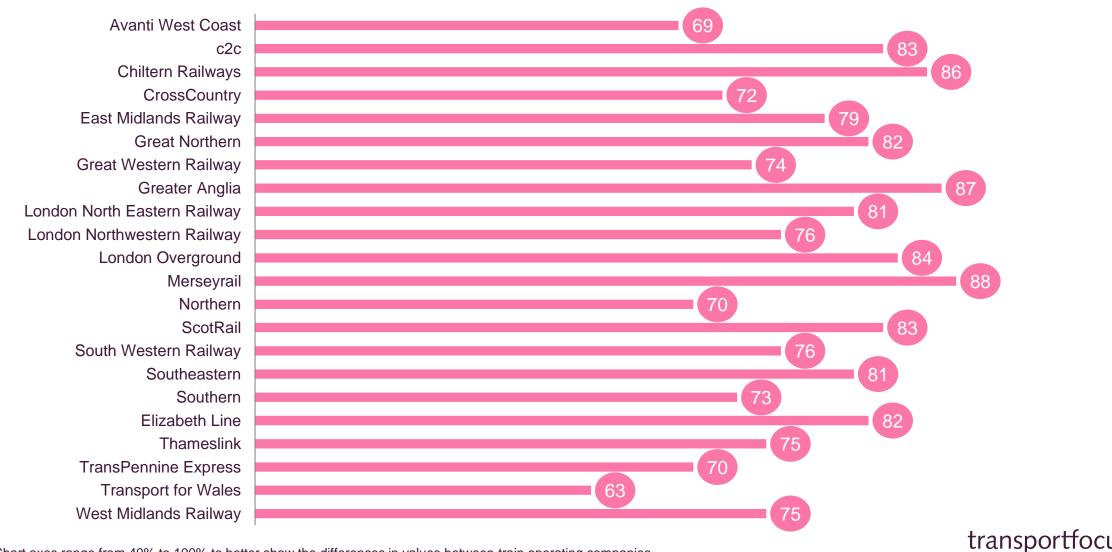
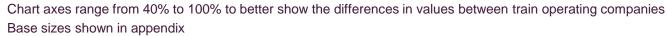


Chart axes range from 40% to 100% to better show the differences in values between train operating companies. Base sizes shown in appendix

### Satisfaction with punctuality/reliability by train company

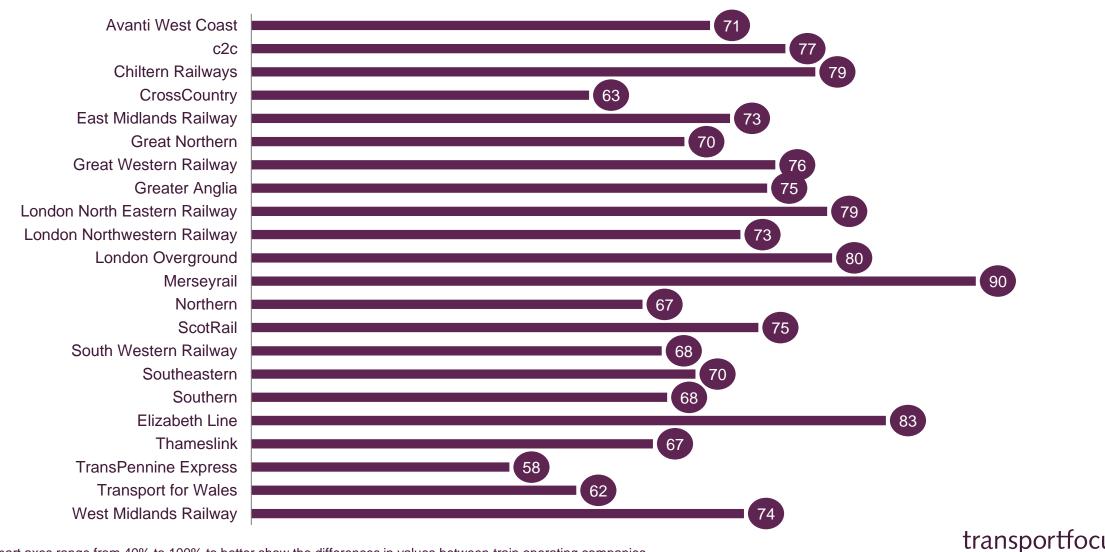
Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

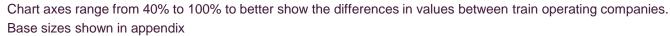




### Satisfaction with frequency of trains on route by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024





### Satisfaction with level of crowding by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

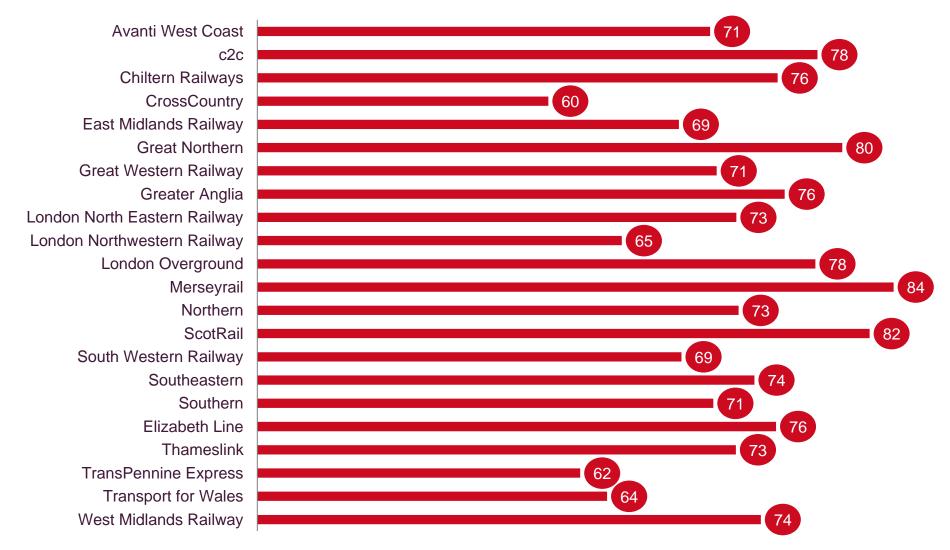




Chart axes range from 40% to 100% to better show the differences in values between train operating companies. Base sizes shown in appendix

### Satisfaction with cleanliness by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

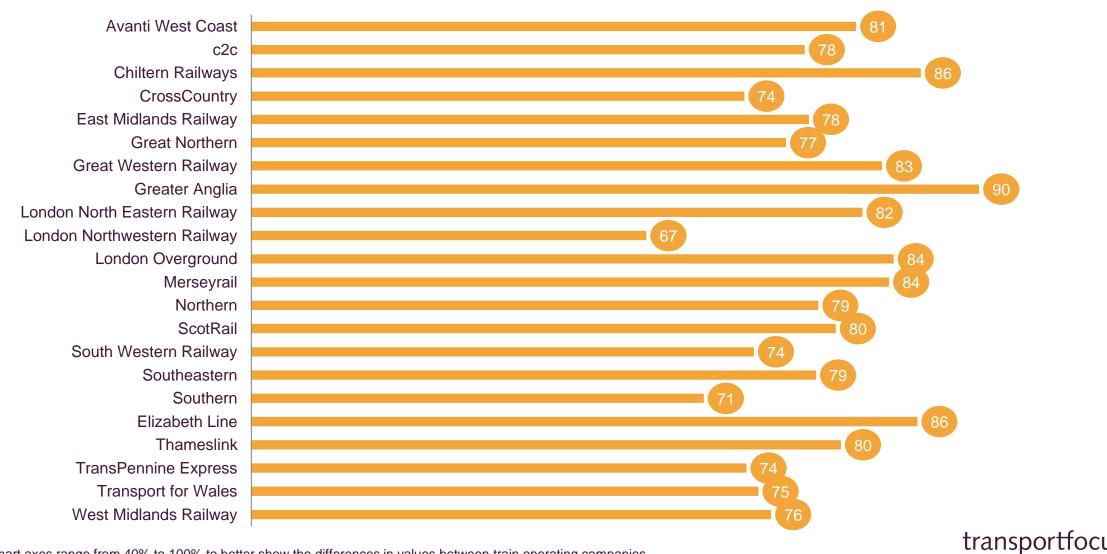


Chart axes range from 40% to 100% to better show the differences in values between train operating companies Base sizes shown in appendix

### Satisfaction with information during the journey by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

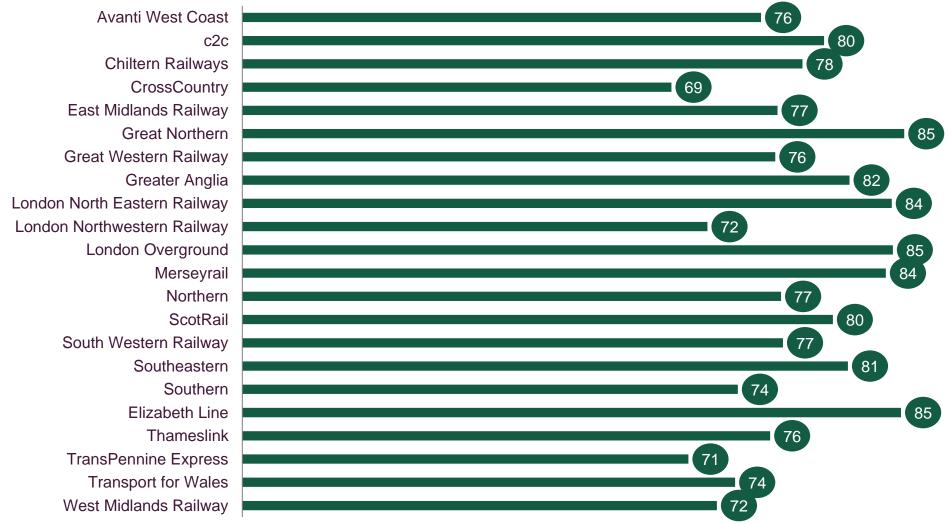




Chart axes range from 40% to 100% to better show the differences in values between train operating companies Base sizes shown in appendix

### Satisfaction with value for money by train company

Over 24 survey waves from 24 Mar 2023 to 4 Feb 2024

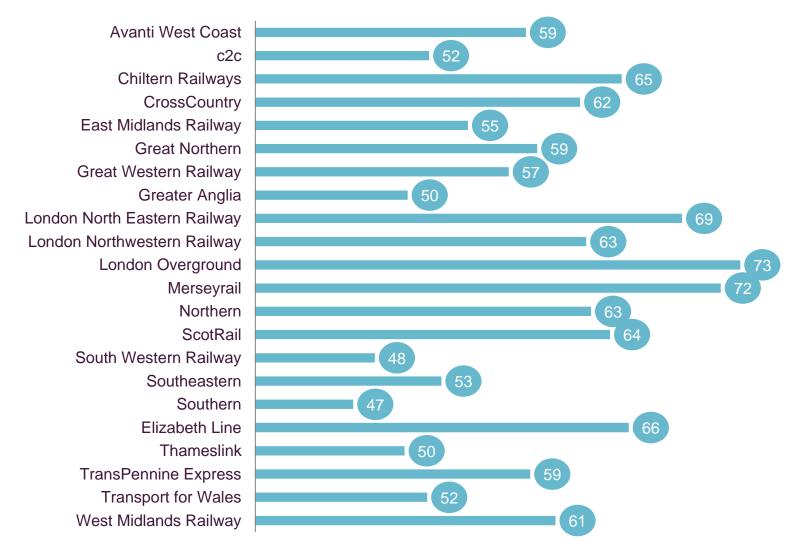




Chart axes range from 40% to 100% to better show the differences in values between train operating companies Base sizes shown in appendix





### Satisfaction over time by train company

Transport Focus's Rail User Survey has been running around two and a half years. This allows us to see the trends in passenger satisfaction over time.

The charts in this section show overall satisfaction and satisfaction with six journey aspects for 15 train companies where we have sufficient sample sizes (where generally more than 75 per data point) over eight distinct 12-survey-wave periods:

- 6 Oct 2021 9 Jan 2022
- 12 Jan 3 Apr 2022
- 8 Apr 26 June 2022
- 1 July 18 Sept 2022
- 23 Sept -11 Dec 2022
- 16 Dec 2022 19 March 2023
- 26 Mar to 20 Aug 2023
- 1 Sept 2023 4 Feb 2024



### Overall satisfaction by 12-wave periods

6 Oct 2021-9 Jan 2022, 10 Jan-3 Apr 2022, 8 Apr-26 June 2022, 1 July-18 Sept 2022, 23 Sept-11 Dec 2022, 16 Dec 2022-19 Mar 2023, 26 Mar-20 Aug 2023, 1 Sept 2023-4 Feb 2024

Avanti West Coast East Midlands Railway		<b>Great Western Railway</b>	Greater Anglia	
84 86 <sup>88</sup> 81 82 81 <sup>87</sup> 84	89 89 88 90 82 81 <sup>84</sup> 83	93 90 87 87 86 85 <sub>83</sub>	87 <sup>90 92</sup> 87 88 86 88 88	
London Nth East Railway	London Overground	Northern	ScotRail	
91 <sup>94 96</sup> 90 <sub>85 86</sub> 88 89	93 90 94 94 92 92	84 85 84 85 87 88 79 80	86 90 90 90 91 89 91 86	
South Western Railway	Southeastern	Southern	TfL Rail/Elizabeth line	
87 87 89 87 88 85 86 82	88 87 <sub>86</sub> 87 89 89 89 84	87 80 79 77 78 78 80 80	86 91 92 91 89 91 87 93	
Thameslink				
mamesiink	Transport for Wales	West Midlands Railway		

Sample sizes: Avanti West Coast 153, 171, 100, 124, 111, 105, 133, 178; East Midlands Railway 161, 143, 120, 121, 116, 106, 114, 127; Great Western Railway 327, 286, 187, 214, 243, 259, 265, 278; Greater Anglia 244, 238, 147, 136, 135, 142, 173, 151; London North Eastern Railway 257, 170, 126, 144, 117, 121, 152, 145; London Overground 214, 189, 120, 133, 118, 94, 147, 154; Northern 379, 341, 219, 250, 256, 259, 289, 306; ScotRail 330, 286, 163, 200, 191, 190, 224, 234; South Western Railway 435, 409, 211, 285, 254, 220, 270, 281; Southeastern 417, 392, 228, 245, 203, 191, 223, 246; Southern 318, 328, 183, 174, 177, 170, 192, 184; TfL Rail 224, 259, 169, 157, 143, 125, 76, 96; Thameslink 219, 218, 117, 139, 141, 142, 149, 181; Transport for Wales 103, 113, 77, 89, 69, 83, 81, 95; West Midlands Railway 155, 161, 83, 89, 107, 103, 122, 132.



## Avanti West Coast Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023 1 Sept 2023 - 4 Feb 2024

## Overall satisfaction



#### Punctuality / reliability



#### Value for money



#### Level of crowding



#### **Cleanliness**



#### Frequency of services





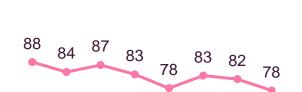


## East Midlands Railway Satisfaction by 12-wave time periods

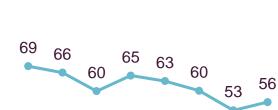
#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023 1 Sept 2023 - 4 Feb 2024

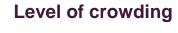
## Overall satisfaction 89 89 88 90 82 81 84 83



**Punctuality / reliability** 



Value for money





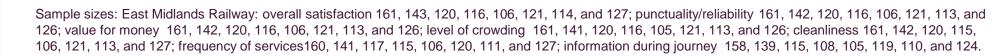
#### **Cleanliness**



#### Frequency of services







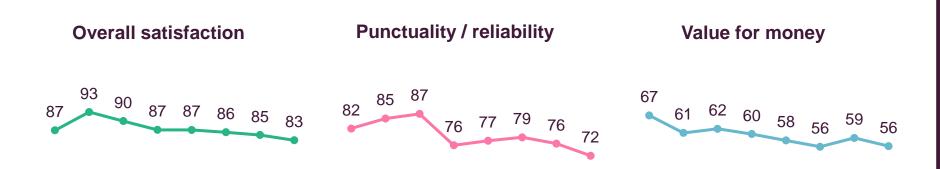


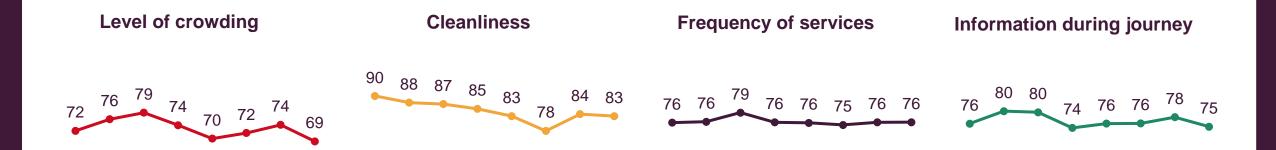
## Great Western Railway Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024





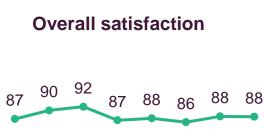


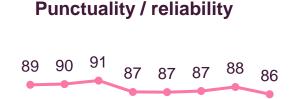
## Greater Anglia Satisfaction by 12-wave time periods

#### Time period dates (left to right)

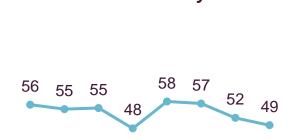
6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

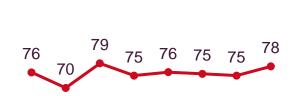




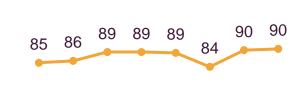
Frequency of services



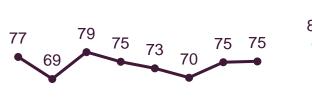
Value for money



Level of crowding



Cleanliness







## London North Eastern Railway Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022

12 Jan - 3 Apr 2022

8 Apr - 26 June 2022

1 July - 18 Sept 2022

23 Sept - 11 Dec 2022

16 Dec 2022 - 19 Mar 2023

26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

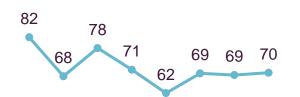
#### **Overall satisfaction**



#### **Punctuality / reliability**



#### Value for money



#### Level of crowding



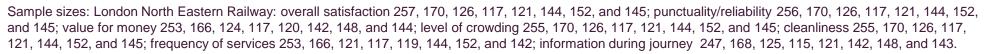
#### Cleanliness



#### Frequency of services









## London Overground Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

### Overall satisfaction



#### Punctuality / reliability



#### Value for money



#### Level of crowding



#### **Cleanliness**



#### Frequency of services







## Northern Satisfaction by 12-wave time periods

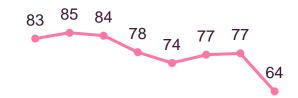
#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023

26 Mar to 20 Aug 2023 1 Sept 2023 - 4 Feb 2024 Overall satisfaction

84 85 84 85 87 8

#### Punctuality / reliability



#### Value for money



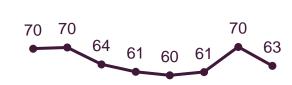
#### Level of crowding

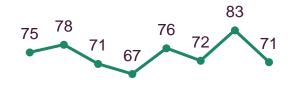


#### **Cleanliness**



#### Frequency of services







## ScotRail Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022

8 Apr - 26 June 2022

1 July - 18 Sept 2022

23 Sept - 11 Dec 2022

16 Dec 2022 - 19 Mar 2023

26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024



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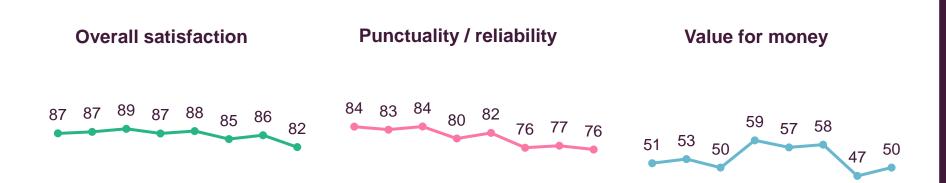


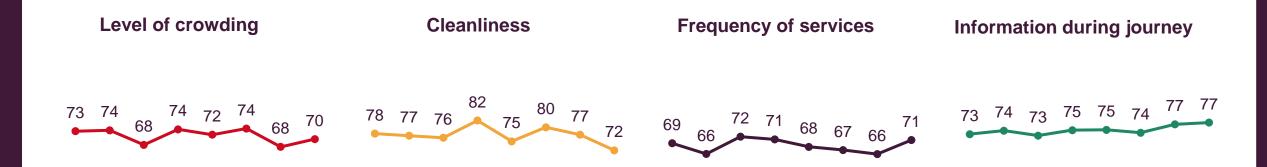
## South Western Railway Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024



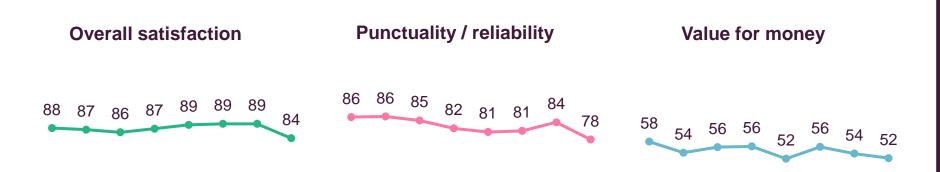


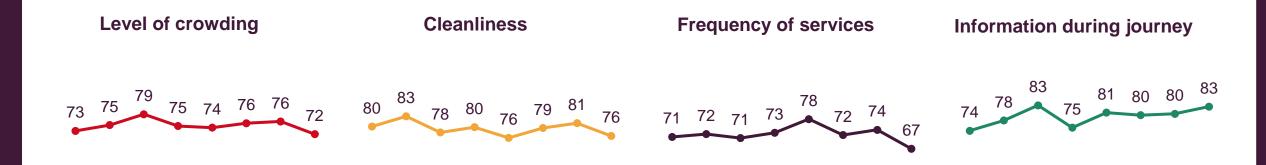


## Southeastern Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023 1 Sept 2023 - 4 Feb 2024



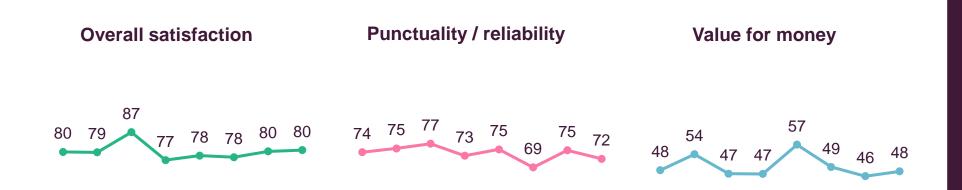


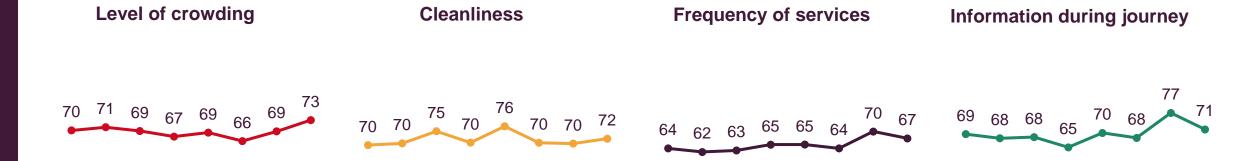


## Southern Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023 1 Sept 2023 - 4 Feb 2024







## Elizabeth line / TfL Rail Satisfaction by 12-wave time periods\*

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022

12 Jan - 3 Apr 2022

8 Apr - 26 June 2022

1 July - 18 Sept 2022

23 Sept - 11 Dec 2022

16 Dec 2022 - 19 Mar 2023

26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

#### **Overall satisfaction**



#### **Punctuality / reliability**



#### Value for money



#### Level of crowding



#### Cleanliness



#### Frequency of services



#### Information during journey



Sample sizes: TfL Rail/Elizabeth Line: overall satisfaction 224, 259, 169, 143, 125, 157, 76, and 96; punctuality/reliability 222, 257, 168, 142, 123, 156, 75, and 96; value for money 212, 244, 153, 133, 114, 143, 63, and 79; level of crowding 224, 256, 168, 143, 125, 156, 76, and 96; cleanliness 224, 259, 168, 143, 125, 155, 76, and 96; frequency of services 223, 258, 166, 143, 125, 157, 76, and 96; information during journey 208, 241, 158, 138, 116, 149, 75, and 95.



<sup>\*</sup> Some base sizes are below 100, which would be the ideal minimum for analysis.

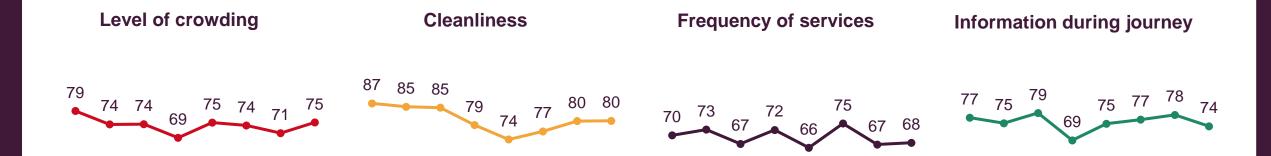
## Thameslink Satisfaction by 12-wave time periods

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

## Overall satisfaction Punctuality / reliability Value for money



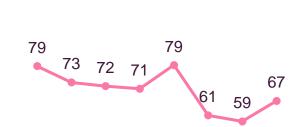


## Transport for Wales Satisfaction by 12-wave time periods\*

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022 12 Jan - 3 Apr 2022 8 Apr - 26 June 2022 1 July - 18 Sept 2022 23 Sept - 11 Dec 2022 16 Dec 2022 - 19 Mar 2023 26 Mar to 20 Aug 2023 1 Sept 2023 - 4 Feb 2024

# Overall satisfaction 86 79 82 82 75 74 72 7



**Punctuality / reliability** 











#### Frequency of services



#### Information during journey



Base sizes: Transport for Wales: overall satisfaction 103, 113, 77, 69, 83, 89, 81, and 95; punctuality/reliability 102, 113, 77, 69, 82, 89, 81, and 95; value for money 99, 106, 76, 68, 80, 86, 79, and 94; level of crowding 102, 113, 77, 67, 81, 87, 81, and 94; cleanliness 103, 113, 77, 67, 82, 89, 80, and 95; frequency of services 100, 113, 77, 69, 82, 89, 81, and 95; information during journey 99, 109, 70, 63, 77, 88, 75, and 91.



<sup>\*</sup> Some base sizes are below 100, which would be the ideal minimum for analysis.

## West Midlands Railway Satisfaction by 12-wave time periods\*

#### Time period dates (left to right)

6 Oct 2021 - 9 Jan 2022

12 Jan - 3 Apr 2022

8 Apr - 26 June 2022

1 July - 18 Sept 2022

23 Sept - 11 Dec 2022

16 Dec 2022 - 19 Mar 2023

26 Mar to 20 Aug 2023

1 Sept 2023 - 4 Feb 2024

#### Overall satisfaction



#### **Punctuality / reliability**



#### Value for money



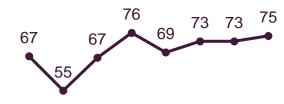
#### Level of crowding



#### Cleanliness



#### Frequency of services



#### Information during journey



Sample sizes: West Midlands Railway: overall satisfaction 155, 161, 83, 107, 103, 89, 122, and 132; punctuality/reliability 155, 161, 83, 107, 103, 89, 122, and 132; value for money 153, 160, 79, 105, 101, 87, 120, and 126; level of crowding 155, 160, 83, 107, 103, 88, 122, and 132; cleanliness 153, 161, 83, 107, 103, 89, 122, and 131; frequency of services 155, 161, 83, 107, 103, 89, 122, and 132; information during journey 149, 148, 78, 102, 97, 84, 115, and 127.



<sup>\*</sup> Some base sizes are below 100, which would be the ideal minimum for analysis.





### Methodology

Transport Focus's Rail User Survey is run within Yonder Consulting's omnibus. Approximately 2000 people per omnibus are screened to identify those who have made a rail journey in the last seven days and the purpose of the journey (excluding London Underground). Those that have then answer questions about satisfaction with their journey. The survey has been placed every other week in the omnibus from March 2023; prior to this, it was placed weekly in the omnibus.

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 that are asked are on the next slide.

Numbers may not add up to 100 per cent, due to rounding.



### Questionnaire wording

(Questions included in this report in bold)

#### Q Thinking about this most recent journey you made by train, how satisfied or dissatisfied were you with?

- 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
- 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

Answer options: Very satisfied, Fairly satisfied, Neither satisfied nor dissatisfied, Fairly dissatisfied, Very dissatisfied, Not applicable, except for 'This train journey overall' which does not have 'not applicable'



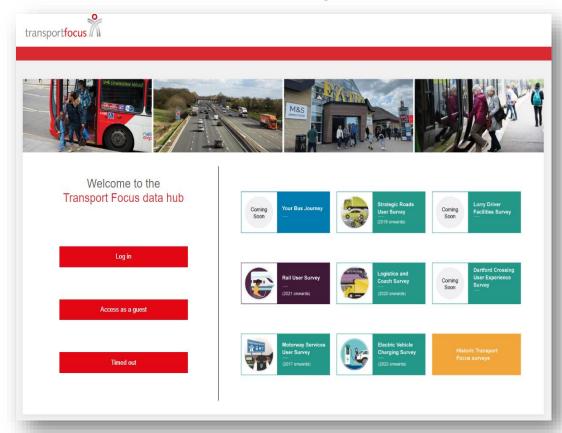
### Base sizes for 24-wave period: 24 Mar 2023 to 4 Feb 2024

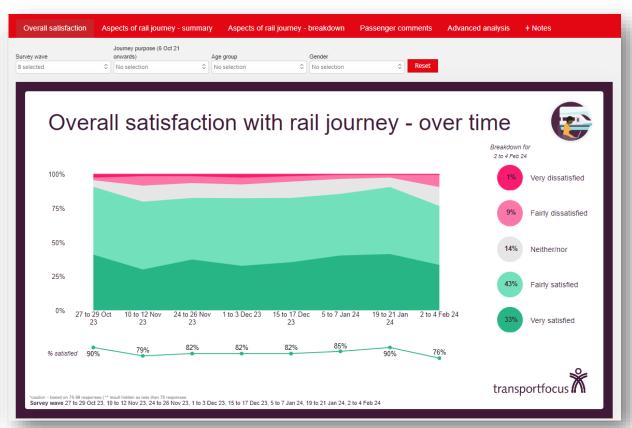
Train operating company sample sizes	Overall satisfaction	Punctuality/ reliability	Frequency of services on that route	Level of crowding	Cleanliness inside the train	Information during the journey	Value for money
Avanti West Coast	311	310	307	310	310	304	305
c2c	112	112	112	112	112	106	110
Chiltern Railways	130	130	130	130	129	126	128
CrossCountry	146	146	144	146	146	142	145
East Midlands Railway	241	239	238	239	240	234	239
Great Northern	163	163	162	162	163	160	157
Great Western Railway	543	543	539	541	543	525	537
Greater Anglia	324	324	324	323	324	316	320
London North Eastern Railway	297	297	294	297	297	291	292
London Northwestern Railway	111	111	111	111	111	106	110
London Overground	301	300	300	301	299	289	289
Merseyrail	137	137	137	135	137	129	118
Northern	595	595	591	587	594	572	587
ScotRail	458	456	458	454	457	431	457
South Western Railway	551	551	549	548	549	535	530
Southeastern	469	469	466	467	467	445	434
Southern	376	375	375	375	376	350	354
TfL Rail	172	171	172	172	172	170	142
Thameslink	330	328	330	328	329	321	316
TransPennine Express	147	146	143	146	145	145	146
Transport for Wales	176	176	176	175	175	166	173
West Midlands Railway	254	254	254	254	253	242	246



### Transport Focus Data Hub

You can analyse the results of this survey and see more information about all Transport Focus's surveys at: <a href="https://www.transportfocus.org.uk/data-hub">www.transportfocus.org.uk/data-hub</a>







### **Contact Transport Focus**

Any enquiries about this report should be addressed to:

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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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