

BRITAIN'S RAILWAY – WHAT MATTERS TO PASSENGERS

Qualitative deep dive for Transport Focus and Network Rail



QUALITATIVE REPORT – MARCH 2026

 quadrangle

CONTENTS



Introduction	3
A reminder of the quantitative findings	5
Qualitative methodology	10
Qualitative headlines	12
Deep dives	
• Personal security and safety	14
• Value for money of train travel	22
• Accessibility and the railway	27
• Digital connectivity on the railway	35
• Punctuality and cancellations	39

INTRODUCTION



QUALITATIVE RESEARCH GOALS

“

To update our understanding of what matters most to passengers and to explore their views about the likely trade-offs between different elements of passenger experience

”

Goals

To dig deeper into passenger (and non-passenger) views on what matters to them when travelling by train, with a particular focus on how things could be improved in respect of:

1. Personal safety and security on trains and at stations
2. Value for money of rail travel
3. Accessibility of train travel
4. Digital connectivity when travelling by train

A REMINDER OF THE QUANTITATIVE FINDINGS



WHAT MATTERS TO PASSENGERS – THE TOP 10

The relative importance of personal safety and security has increased in 2025/26 – but 9 of the top 10 were also in the top 10 in 2022

1.
Trains run on time and are not cancelled
 (Score: 204*)
 2022 rank #2

2.
My personal safety and security on the train
 (196)
 2022 rank #6

3.
My personal safety and security at stations
 (182)
 2022 rank #8

4.
The ticket price is value for money
 (176)
 2022 rank #1

5.
Being kept informed about delays and my options during disruption
 (149)
 2022 rank #7

6.
Accurate and timely information about train times
 (149)
 2022 rank #4

7.
Getting a seat on the train
 (137)
 2022 rank #5

8.
Trains are sufficiently frequent
 (128)
 2022 rank #3

9.
Trains and stations are easily accessible to older and disabled people and those with pushchairs
 (110)
 2022 rank #13

10.
Inside of trains are clean and well maintained
 (99)
 2022 rank #10

* The results have been indexed to an average of 100
 This means that **any feature with a score over 100 is more important than average, and a score below, less important**

Note: the wording of many of the statements has changed in 2025 so direct comparisons should be treated with caution.



QUALITATIVE PRIORITY TOPICS

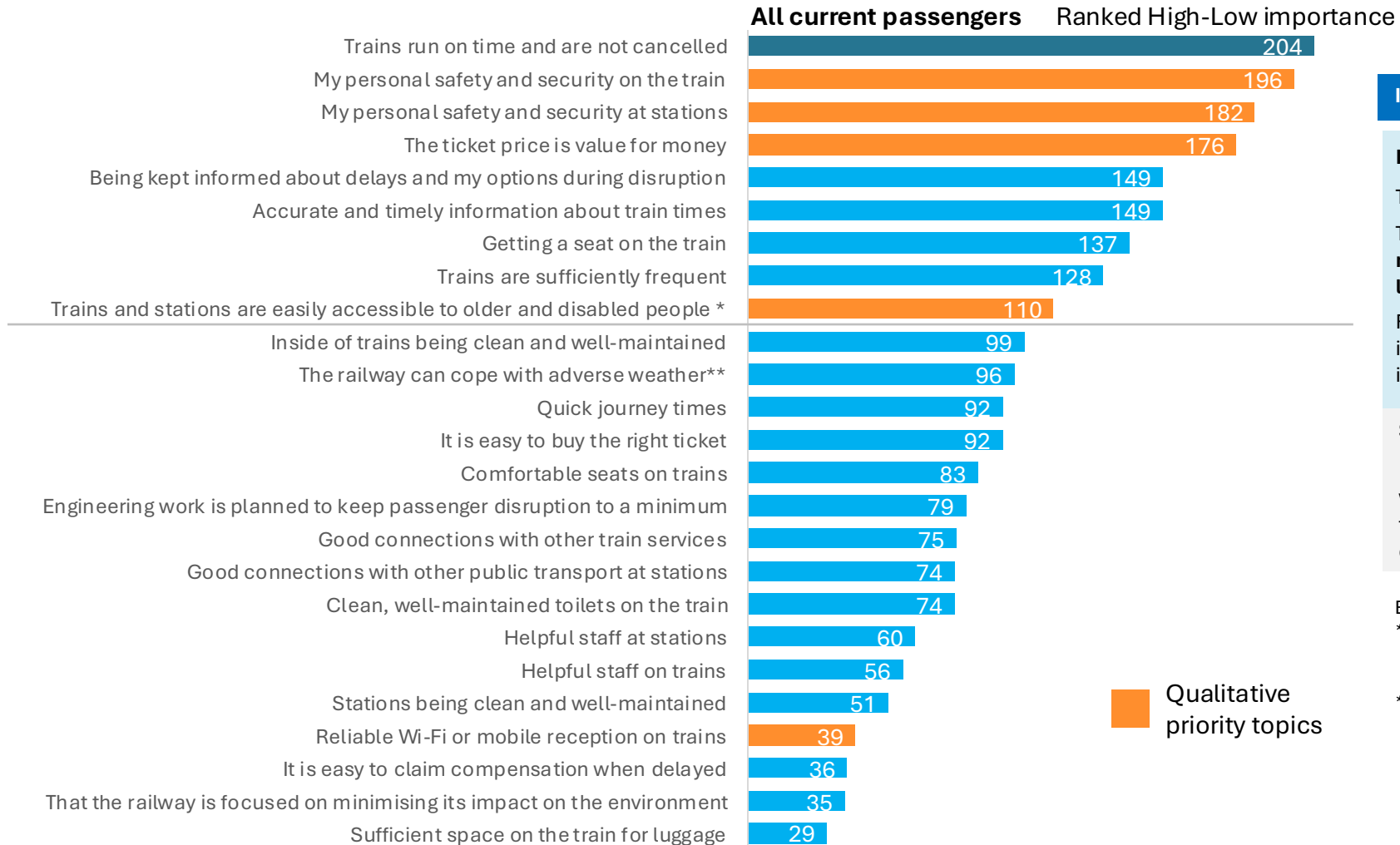
In addition to those listed here in the Top 10, the importance of **“Reliable Wi-Fi or mobile reception on trains”** (ranked #22) was also explored

- 1. Trains run on time and are not cancelled**
(Score: 204*)
2022 rank #2
- 2. My personal safety and security on the train**
(196)
2022 rank #6
- 3. My personal safety and security at stations**
(182)
2022 rank #8
- 4. The ticket price is value for money**
(176)
2022 rank #1
- 5. Being kept informed about delays and my options during disruption**
(149)
2022 rank #7
- 6. Accurate and timely information about train times**
(149)
2022 rank #4
- 7. Getting a seat on the train**
(137)
2022 rank #5
- 8. Trains are sufficiently frequent**
(128)
2022 rank #3
- 9. Trains and stations are easily accessible to older and disabled people and those with pushchairs**
(110)
2022 rank #13
- 10. Inside of trains are clean and well maintained**
(99)
2022 rank #10

* The results have been indexed to an average of 100
This means that **any feature with a score over 100 is more important than average, and a score below, less important**

Note: the wording of many of the statements has changed in 2025 so direct comparisons should be treated with caution.

WHAT MATTERS TO PASSENGERS – THE FULL RESULTS



Index

Interpreting the MaxDiff results - Index scores

The results have been indexed to an average of 100

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

For example, a feature with a score of 200 is twice as important than average and a score of 50 is half as important as the average

Significant differences

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

Exact wording presented

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

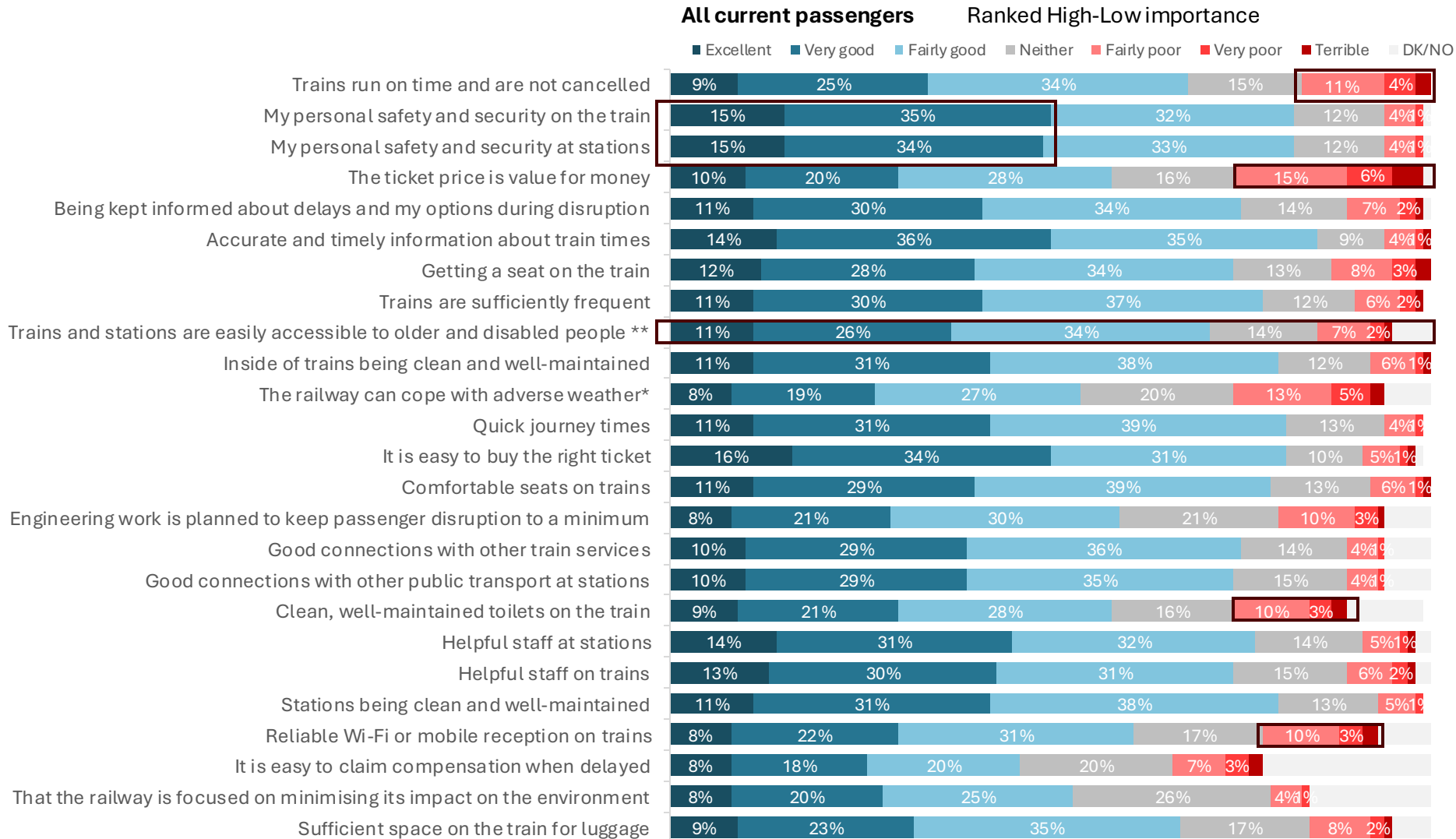
** *A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat*

MXD1 Please tell us which of the items are most and least important to you when travelling about your commute / most frequent business trip / most frequent leisure trip / most frequent trip for personal business

Base: All current passengers (n=12,764)

RATING OF RAILWAY PERFORMANCE

Current passengers rated the performance of the railway on the same 25 features tested for their importance. "Trains run on time and are not cancelled" and "the ticket price is value for money" are high priorities which receive 'poor' scores



QB2. Thinking again about the type of journey you make most often, please tell us how you rate the railway's performance on the following
Base: All current passengers (n=12,764)

Exact wording presented

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

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

QUALITATIVE METHODOLOGY



RESEARCH APPROACH

APPROACH

- Eight 90-minute focus groups – six online, two in-person in Birmingham
- Five or six participants per group
- Fieldwork between 3rd – 11th February 2026
- Mix of rail passenger types and demographics – including one group of non-rail users

Group	Key criteria
Group 1	Commuters
Group 2	Non-users
Group 3	Business travellers
Group 4	Leisure travellers
Group 5	People with sensory or mobility disabilities
Group 6	People with less/non-visible disabilities
Group 7	Who could use online but are reluctant to
Group 8	Who are less able to use online

QUALITATIVE HEADLINES



HEADLINES

PERSONAL SAFETY & SECURITY

A sense that the recent high-profile attacks on the railway are part of **wider societal issues** with heightened awareness driven by media coverage.

Areas for suggested improvement to tackle personal safety and security concerns included:

- Improved lighting on trains and on station platforms and concourses
- Greater staff presence and visibility including British Transport Police
- CCTV that is visible and monitored live
- Barriers between the platform and the tracks

VALUE FOR MONEY (VFM)

Generally, **poorly rated** due to the combination of high ticket prices and challenges with quality of service provided (e.g. reliability, comfort, overcrowding on trains etc.).

While some identify advantages with rail travel – can be faster and more relaxing than other transport modes – often it does not compare favourably, especially with driving (comfort, flexible, less expensive etc.).

Peak and long-distance travel often thought to be lowest VFM due to high cost, reliability issues and overcrowding.

Overall, aside from ticket prices, tackling other areas of the passenger experience will help to improve VFM.

ACCESSIBILITY AND THE RAILWAY

Considered to be highly inconsistent both in terms of the support provided by staff (e.g. staff shortages can be an issue) and the facilities (e.g. signage is often good at stations but broken lifts and toilets can be a major inconvenience).

Key areas for potential improvement include:

- The audibility of station announcements
- Consistency of service (e.g. available toilets and staff)
- Staff training and visual signs of support

DIGITAL CONNECTIVITY

Wi-Fi is considered unreliable and poor quality when it does work on trains.

While many are resigned to a poor experience, most also see good digital connectivity as a hygiene factor which should be provided, especially when passengers are paying high ticket prices and travelling long distances.

Primary passenger needs are:

- More consistent connectivity. While a super-fast service is ideal, a basic connection is the priority
- Greater transparency about what to expect – don't promise what cannot be delivered

PUNCTUALITY & CANCELLATIONS

Not a specific topic for the qualitative study, but as the top passenger priority it surfaced in discussions.

Why? Because most passengers have experienced disruption when travelling and the knock-on impact can be significant not merely inconvenient (e.g. missed appointments/ events, lost business etc.) Some passengers mentioned improved reliability on their service but, overall, there is a need for:

- Improved reliability of train services over faster train journeys
- Improved communications during disruption to give passengers more control and help them to plan around the problem



PERSONAL SECURITY & SAFETY



PERSONAL SECURITY & SAFETY



Quantitative summary

The relative importance of personal safety and security – both at stations and on the railway – has increased compared with 2022.

This applies across the survey sample, but it is particularly important to:

- Females
- Those with physical and mental health disabilities
- Ethnic minorities
- And those travelling with buggies and pushchairs



Qualitative summary

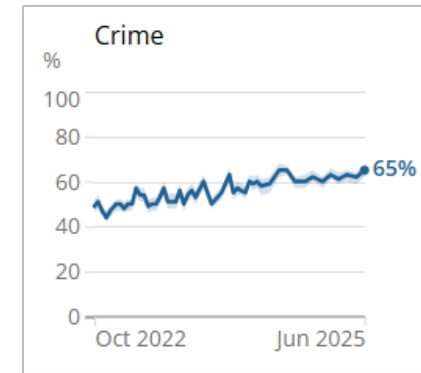
Personal safety and security is often highlighted spontaneously by passengers as an important issue when travelling by train. Most are not surprised to see it high up in passenger priorities. There are differences in opinion about where it may lie in the top 10, but these differences are also apparent between passenger types in the quantitative data.

Although the Huntingdon incident was spontaneously mentioned by some in the groups, there is also a sense that this is part of wider societal issues and heightened awareness partly led by media coverage. This is supported by other national data sources which indicate that crime has become more of an issue in the minds of the population since the 2022 research (see opposite).

Key qualitative issues:

- **Travelling after dark** a key concern – especially among females in poorly lit areas
- **Visible presence of staff** vital as it provides a more tangible sense of protection and reassurance than technology
- **CCTV** provides some reassurance but more so when the images can be seen immediately e.g. as on buses (where being able to see the driver can also add to the feeling of safety)
- **Body worn cameras** generally don't make passengers feel safer (e.g. too few staff to wear them, staff focus on ticket checks, and purpose is evidence in court rather than immediate support)
- **Anti-social behaviour** of other passengers can cause stress (e.g. sitting in pre-booked seat, playing loud music, drunken groups, intimidating groups of “youths”) which is heightened when people have seen clips / stories on social media and other sources

Importance of crime on the rise



Public opinions and social trends, GB, June 2025, ONS

2022/23 CONTEXT - PASSENGER CONCERNS ABOUT SAFETY HAVE SHIFTED

In this study we heard more specific concerns over the potential for violence on trains compared to 2022-2023 (**Clean, Well-Maintained & Safe Railways**, Transport Focus)

The concerns and fears come across as more specific, personal, and heightened in tone in this round of research i.e. passengers using “I have” language to describe incidents rather than hypothetical “people might”

2022-2023
(Clean, Well-Maintained and Safe Railways)

Examples of environmental risks to personal safety

- Cleanliness and maintenance issues e.g. platforms not gritted, lifts in poor condition
- Poor lighting on and around the station

Examples of risks to personal safety from other people

- Known anti-social behaviour spots e.g. intimidation, theft, harassment, drug dealing
- Large groups of individuals especially when drinking alcohol e.g. football fans
- Large numbers of passengers/overcrowding
- Lone travellers, especially women

2025 – 2026
(What Matters to Passengers)

- Lack of barriers between the platform and the tracks
- Poor lighting of underpasses
- Help buttons out of service

- Concern over the potential for aggressive attacks/stabbings
- Concerns over theft e.g. laptop, mobile phone
- Intimidating groups of “youths”
- Travelling late at night
- Lone travellers, especially women, older passengers and those with mobility issues
- Concern over younger female travellers (e.g. not wanting teenage daughters to travel on the train alone)

NOT EVERYONE FEELS THE SAME LEVEL OF RISK AND FEAR

And context is important – not all journeys are the same



Women appear to be considered more at risk than men

Both women themselves, and men reflecting on their friends' and families' personal experiences, considered women to be of particular risk, especially if travelling alone or late at night

However, this is not a universal experience. It is not the case that all women feel uncomfortable and unsafe on all journeys, rather there is a heightened perception of vulnerability for these passengers

Qualitatively, this difference appears to be slightly more pronounced in this wave of research compared to 2022/2023



Journey length and route matters too

Short journeys, especially on trains with large numbers of teenagers after school or college can feel less safe as the kids can come across as “untouchable” and a repeated issue and “known problem”

Longer journeys can feel safer due to the kinds of other passengers likely to be travelling e.g. midweek long distance may well be business travellers

Similarly, weekend routes, routes used by sports fans or where there may be heavy drinking are considered higher potential for anti-social behaviour

“It depends where I am. I live and work in London, so I’m used to certain types of people. I don’t work on the train as I wouldn’t feel comfortable having my laptop out. **I tend to feel safer on the longer distance train** because it’s a different type of clientele.”

Business traveller

“I’ve got young daughters, I wouldn’t let them travel on the train by themselves, no way.”

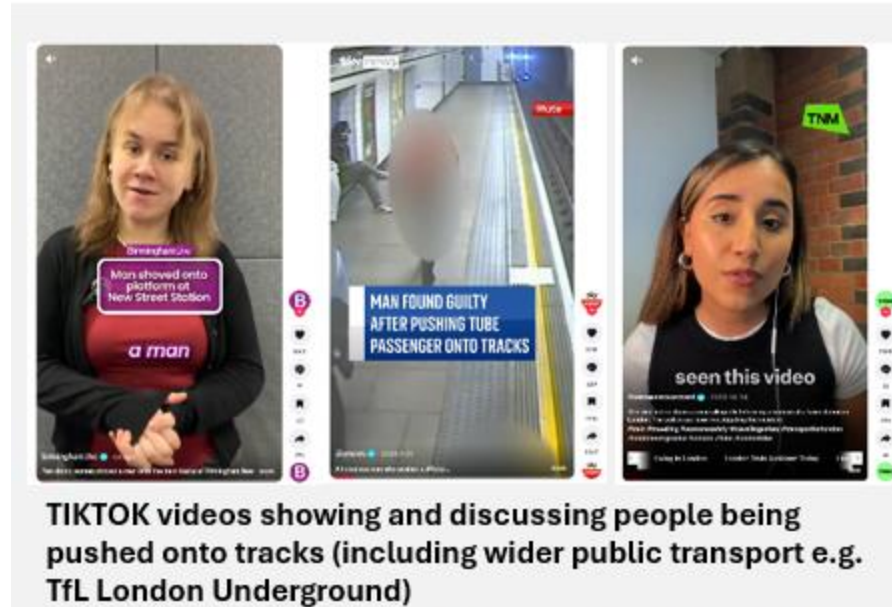
Commuter

THERE IS A PERCEPTION THAT PASSENGERS “HEAR ABOUT” THESE INSTANCES MORE

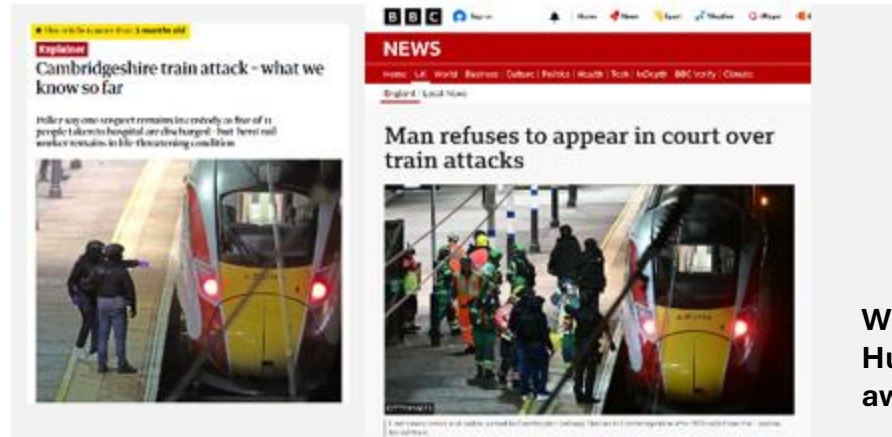
Although some passengers acknowledge there have probably always been incidents on the rail network, they are more likely to hear about them now

The horrific incident in Huntingdon was spontaneously mentioned and referenced in some focus groups; however, other incidents and “stories” heard about online were also referenced.

Passengers who are less digitally engaged also referenced that security is a bigger issue today, with awareness of these incidents more likely to be through traditional media e.g. newspapers, or word-of-mouth compared to social media



“I’ve seen a lot of incidents where they’ve been quite violent on trains and I’ve never been part of it but **I see it on Facebook all the time**”
Business Traveller



CCTV AND BODY CAMERAS COULD HELP REASSURE, BUT NOT IN ISOLATION



Is anyone really watching?

Visible CCTV on the train and at the station is generally perceived as a positive and most passengers are happy to have more surveillance if it can act as a deterrent and help to provide evidence in the event of an incident.

However, there are questions over how helpful and useful CCTV is *in the moment* and if “anyone” is watching, and even if there is, will there be a member of traincrew or British Transport Police ready and able to help.

Passengers felt AI facial recognition and AI in general is not going to solve this problem alone. In particular, because individuals' intent on causing disruption would be likely to hide their face.

Overall, there is a perception among some passengers that those who commit crimes (e.g. fare dodging) or display anti-social behaviour are not effectively punished, which contributes to concerns about their personal safety.



Body cameras rely on staff and train crew being available

Similarly, there is scepticism over whether body cameras worn by staff will help in the moment, rather than just providing evidence after an incident.

In addition, body cameras would only be of use if there is both a member of traincrew available and willing to get involved in the incident.

Passengers question how much body cameras are really for the benefit of staff and their own safety, rather than to help promote the safety of passengers.

“I wouldn’t feel much of a difference if staff were wearing body cams because you hardly ever see the staff. You maybe see them when they’re checking tickets but something can happen in a carriage and they’re not going to see the incident on their body cams. **For me, I see those body cams as their personal safety, not our personal safety**”

Commuter

[Would CCTV or body worn cameras help?]
“Not really, **just because it’s so easy to wear a hood and a balaclava**. You don’t know who is actually coming onto the train”

Non-passenger

“There’s **a lack of consequence** for people who are, (for example) fare dodging or stealing or something like that because they can’t get caught as quickly as if they was a police presence there the entire time.”

Passenger with a sensory or mobility disability

MORE STAFF AND GREATER VISIBILITY OF STAFF COULD BE A DETERANT



Can, or should, staff get involved in incidents?

Passengers have conflicting opinions on the role of staff with safety, especially on the train itself.

Many passengers suggest that greater staff presence on platforms and on the train would act as a deterrent and be reassuring, especially for lone travellers at night in more rural stations and isolated locations or comparatively empty trains.

Overall, greater staff presence is considered a positive, even if they are not expected to intervene directly.

“If you went into Morrisons and someone was getting really aggressive, it’s not the person behind the till’s job to intervene, they’re not trained for that, they’re not paid enough for that [that’s why you have store security officers]. **I wouldn’t expect the train staff to do that either, which is why I think there should be an extra security on board trains**”
Non-passenger

“...staff or management should have at the least, the **training to handle various situations**. We don’t know what’s gonna happen. So, them being able to adapt to the situation is very helpful. And you would expect that if they are on the train, **they should actually intervene or help out** at least..”
Leisure passenger

Two perspectives emerge but most do not expect staff to actively intervene:

SHOULD STAFF INTERVENE?



No

- It’s not their job: unlikely to have received appropriate training to safely intervene
- Suspect the staff are not “paid enough to get involved” and would not want to intervene
- Perception that staff on the train are “ticket officers” rather than there to protect and support passengers
- Specialist staff e.g. a member of British Transport Police would be more appropriate (*ref: some passengers had travelled on trains that are known to be rowdy with BTP and noted it made a difference*)

Yes

- If staff are provided with appropriate equipment and training, they should be able to help during an incident
- Staff are in a position of authority compared to passengers
- More appropriate for a member of train crew to intervene than another passenger; unlikely to listen to another passenger (*ref: some passengers had personal experience of asking people to stop swearing around children and this request being ignored*)

IMPROVING FEELINGS OF SAFETY AND SECURITY

01

Improved lighting on trains and on station platforms and concourses

Poor lighting was frequently cited as something that makes passengers feel unsafe, especially when travelling late at night or on their own, especially those in more rural areas.

Well-lit stations and underpasses combined with more visible CCTV could help passengers feel safer.

Improved lighting was also referenced as an area of improvement in 2022/2023.

02

Greater staff presence and visibility including BTP

Although few genuinely expect staff to intervene during an incident, more staff could help deter low-level anti-social behaviour. In addition, this could help passengers feel there is an immediate point of contact rather than the current option to text BTP to report an issue.

On trains and routes where there are known problems, a visible member of BTP that is communicated to passengers would be appreciated.

03

CCTV that is visible and monitored

More visible and obvious CCTV can help provide a sense that there is at least some recourse should an incident happen and to act as a deterrent.

Several passengers compared the CCTV on trains to that on buses where a live feed is shown, this makes it clear that CCTV is working, being recorded, and others can see what is happening, especially if you are travelling on your own in the carriage.

04

Barriers between the platform and the tracks

Several participants noted that this is an area of improvement and where the safety of the network itself had improved, including at stations known to be sites where people have sadly died after jumping onto the track.

Seeing this at other stations and areas could help to reassure on the general safety of the station platform e.g. preventing being “pushed” or people jumping onto the tracks.



VALUE FOR MONEY OF TRAIN TRAVEL



VALUE FOR MONEY OF TRAIN TRAVEL



Quantitative summary

Although “*ticket price is value for money*” has slipped from #1 to #4 between 2022 and 2025/6, it is still clearly of major importance. Compared to the other 25 measures, it is rated the lowest and passengers say an improvement in value for money (VFM) is most likely to mean them travelling by train more in the future.

VFM is particularly important to:

- Males
- Those without a disability or accessibility challenges



Qualitative summary

As in the quantitative survey, passengers often do not have a good perception of the value for money of train travel. This is due to a combination of the higher-than-expected cost – especially for long distance journeys – and poor comparisons with driving (e.g. reliability and cost).

Non-users of rail also have a negative perception of rail ticket prices and overall VFM. This was also seen in the quantitative results, with reduced ticket prices being the top motivator for getting people (back) onto the railway.

Key qualitative issues:

- **High ticket prices** which are perceived to have risen in recent years without a corresponding improvement in the service, and **do not compare favourably with other transport modes** (especially car travel where people tend to think of fuel, parking and that you are not charged per person)
- Issues with **service quality** (reliability, comfort, overcrowding etc.) also reduced perceptions of VFM
- **Peak ticket prices** are considered particularly high and at these times reliability and overcrowding are often experienced
- **Railcards** can help to make travel better VFM
- **Local vs longer journeys** – a perception that local journeys might represent better VFM
- **The ease of booking tickets** (e.g. having to split tickets for the best price) with some passengers saying that lessons could be taken from the ease and lower cost of booking European travel

PASSENGERS FEEL MOST TICKETS ARE NOT GOOD VFM



Value perceptions were (almost) universally poor

Of course, many people are feeling the cost of living, *everything has gone up*. But rail fares feel like a particularly tough pill to swallow:

- Commuters and business travellers feel trapped and quite angry
- Longer distance travel seems to increase exponentially in cost
- Local travel however is seen as relatively acceptably priced
- For those with free passes funded by local VFM is rated highly for local journeys, less so longer distance trips



Ways of saving don't seem attuned to how people use the train

Many felt the way to get cheaper tickets just didn't work for them:

- Booking really far in advance is good for some but not for many
- Split ticketing works for some, but most didn't understand why they should have to, they just want the lowest cost
- For those who don't commute for 3+ days there appears to be no way of mitigating high ticket prices
- Systems of saving are at best opaque with multiple platforms offering different deals

“Why does the price have to change? It costs the same to run a train, however soon I book.”

Digitally reluctant

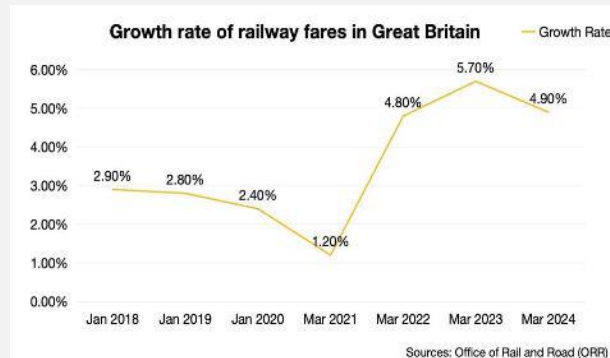
“Why should someone with a computer get a better deal than me, it's just not fair.”

Digitally less able

“I use split tickets. Even if I have to split between 5 or 6 stations, if I'm saving £40 or £50, I'll do it”

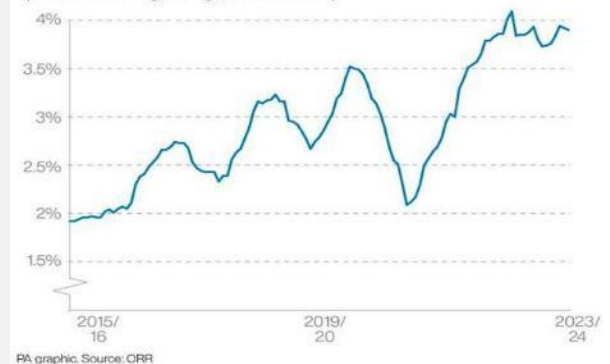
Commuter

Are value perceptions reasonable?



Full train (equivalent) cancellations in England & Wales

(12-month moving average, to Feb 3 2024)



The rate at which prices are going up was increasing, while at the same time performance (in terms of cancellations) has declined.

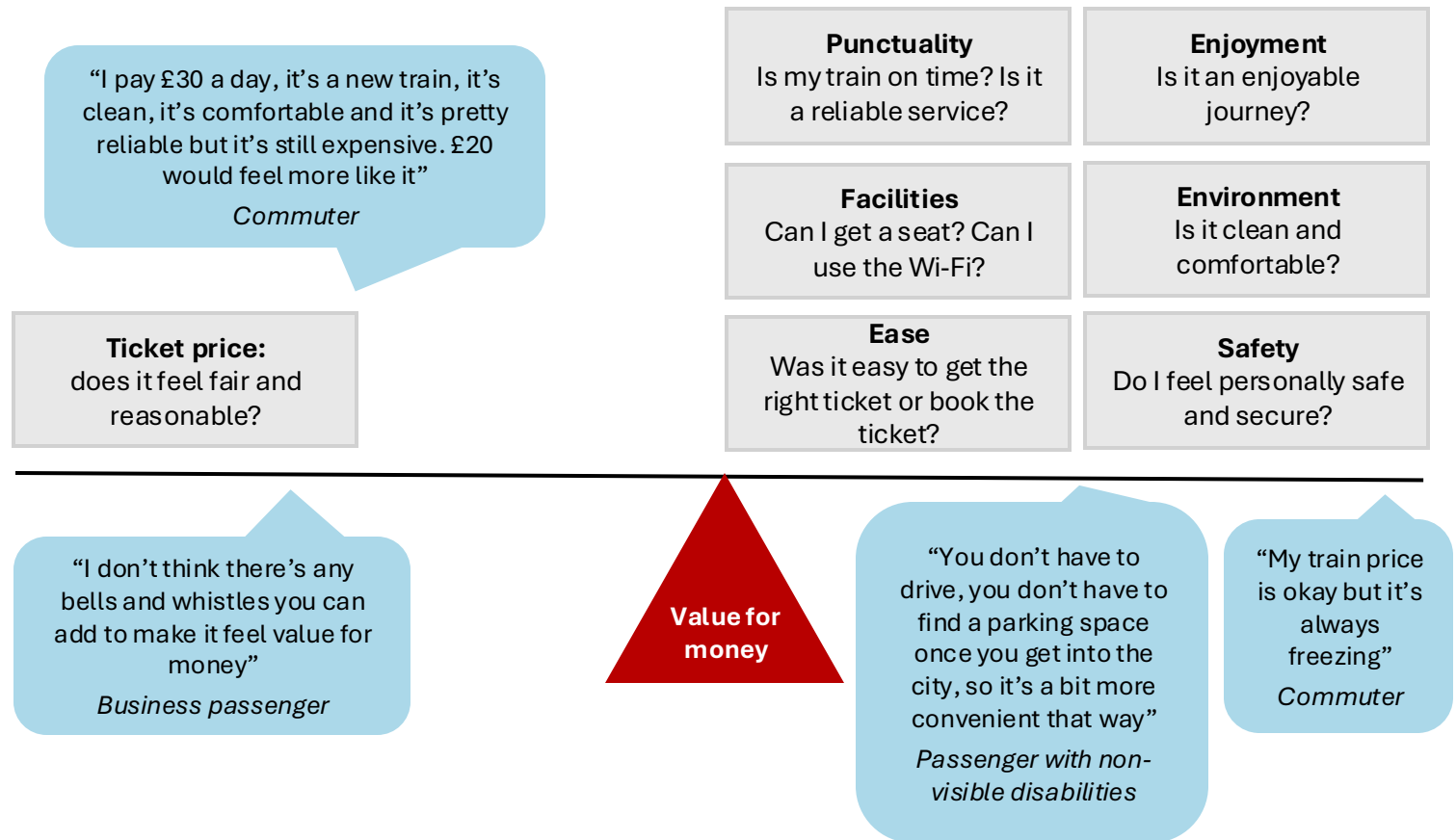
Passenger expectations of VFM are not only measured in terms of ticket price, but it is the most important.

ALTHOUGH PRICE IS IMPORTANT, VFM IS ABOUT THE OVERALL EXPERIENCE OF THE SERVICE

Value for money is about keeping multiple factors in balance

Price is the main driver and factor in value perception, however, there are other factors that need to be kept in balance to help ensure the price feels justified.

Currently, for many, the scales are not in balance, with the ticket price outweighing the wider quality of the service.



IMPROVING PERCEPTIONS OF VFM

Beyond reducing ticket prices, improving the overall experience could help improve perceptions of VFM

There's no getting away from the high prices that some individuals pay for rail travel, with business travellers and commuters feeling particularly aggrieved.

High price perception is also a barrier to non-passengers travelling.

Older passengers, and those with railcards, and those with shorter journeys are more positive about the overall VFM of their journey.

01

Transparency of pricing

Ensuring that the price of the ticket is fair rather than some passengers paying less for the same journey e.g. the perception that the more digitally savvy can access cheaper tickets, including those who know how to use split ticketing.

Ability to change tickets more easily without a financial penalty.

Automatic reimbursement from Delay Repay.

02

Improve price perceptions vs alternative travel options

Train travel can be unfavourably compared to alternative ways to travel, including flying and driving (coach and bus less prevalent). What can the railway do to improve these comparisons? e.g. highlighting the full cost of car ownership and driving, and additional costs associated with air travel (e.g. transport to/ from the airport, and/ or parking charges).

"It was about £150 for me to travel with the children so it would have been a lot cheaper to drive instead"

Leisure passenger travelling with children

03

Greater comfort and hospitality

Ensuring trains are warm in winter and cool in summer.

Seats that are comfortable to sit in, ensuring that seat reservations are honoured.

Drinks and refreshments provided especially on long journeys.

ACCESSIBILITY & THE RAILWAY



ACCESSIBILITY AND THE RAILWAY



Quantitative summary

That “trains and stations are easily accessible to older and disabled people and those with pushchairs” is in the top 10 issues which matter to passengers in 2025/26 (at #9). Clarity of audio and visual announcements are of greatest importance, alongside accessible toilet provision.

Accessibility is particularly important to:

- Females
- Under 35s and over 65s
- Those with a disability
- Black and ethnic minorities



Qualitative summary

Overall, there is a sense that accessibility on the railway is hit and miss – those most in need can receive excellent support from staff and the general signage at stations is often regarded as good, making stations relatively easy to navigate.

Equally, however, there are stories of unsympathetic staff and very poor facilities (e.g. lifts being out of service for many weeks or months).

Key qualitative issues:

- **Accessible toilet provision** – the general cleanliness and availability of toilets can be an issue (e.g. references to broken toilets causing passengers to get off the train and wait for the next one)
- **Inaudible announcements** – passengers reference the difficulty of hearing platform announcements (less so on trains). This is a particular issue for disabled passengers, many of whom need more time to plan and get around stations
- **Quality of announcements** – more comprehensive information is sometimes desired
- **Insufficient staffing** – those passengers with accessibility challenges and/or disabilities are often the most in need of support from staff – the quality of their travel experience is regularly dependent on it (e.g. for navigation around the station or help getting on and off trains)
- **Staff attitudes** – for every member of staff who goes above and beyond, there is one who is not so supportive – this is especially an issue for those with *non-visible* disabilities

“Sometimes it’s good, sometimes you’ll have a good journey or sometimes it’s a nightmare”

Passenger with non-visible disabilities

FACTORS DETERMINING PERSONAL ACCESSIBILITY

Accessibility is determined by individual need, the context and service provision

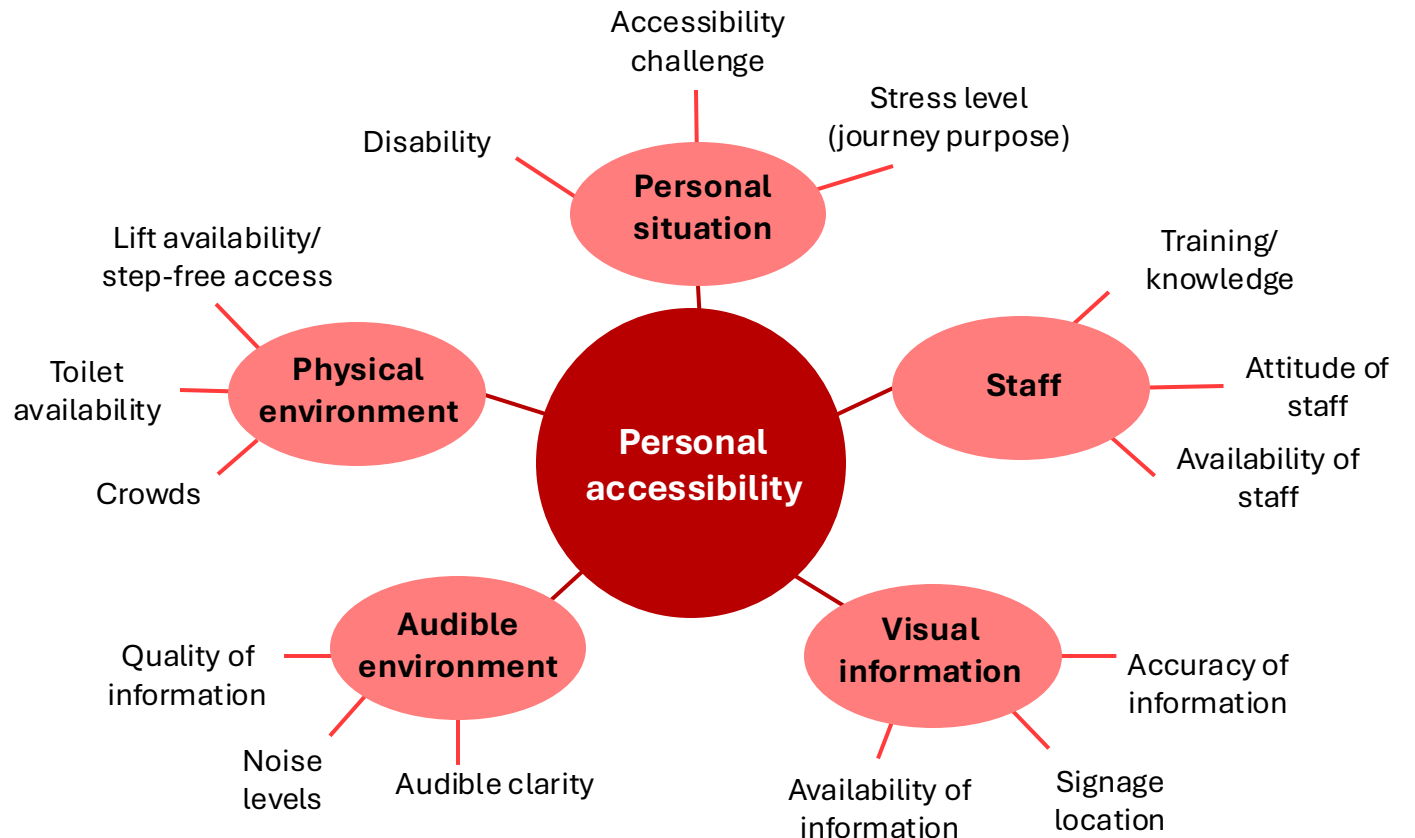
Accessibility on the railway impacts everyone to a certain degree and a large minority of passengers to a significant degree.

A high proportion of people in the main quantitative survey either report a disability of some kind and / or accessibility issues on some or all their journeys:

33% rail passengers identify some kind of **disability** (e.g. mobility, learning & memory, mental health, sensory, social & behavioural)

45% passengers who have **accessibility** issues on at least some journeys (e.g. with a buggy, mobility scooter, bike, need to use a lift)

The varied range of accessibility factors which can change day-to-day



ACCESSIBILITY – PHYSICAL MOVEMENT



Inconsistent wheelchair access

Those in wheelchairs or travelling with people in wheelchairs clearly require greater support than most other passengers, and the presence of staff is often vital.

While some have had very smooth experiences, reported challenges include:

- **Passenger assistance, even when pre-booked, is not guaranteed** and depended on the availability and willingness of staff to help, or train busyness
- Instances where they were **unable to board trains due to overcrowding** or the absence of staff to deploy ramps. This can lead to delays and/ or switching to a bus or car



Poor toilet facilities

Passengers expressed concerns regarding the cleanliness (including smell) and accessibility of toilets on trains and at stations – reflecting that this was one of the poorer scoring topics in the quantitative survey.

There's a strong sentiment that these facilities could be better maintained, particularly when it means that toilets are closed or not working, especially on long journeys. This can be so disruptive that passengers might even have to get off a train to find an alternative. This is particularly problematic for those with disabilities or accessibility challenges.

“There's not enough room to be able to sit down... the train's full, there's not enough room to stow luggage and **I feel like you just had a constant battle navigating space on the train.**”

Passenger with sensory/ mobility disability



Insufficient and uncomfortable seating

Many passengers have experienced overcrowding on trains which can create a poor travel experience, especially when travelling longer distances.

Others also mention that that seats on newer carriages can be very uncomfortable – both the seats themselves (hard) and the lack of legroom.

“If you go on a Cross Country train for example, **their seats are really hard**, they're like Stagecoach [bus] seats and it's plastic.”

Commuter

“TransPennine seats are so hard. By the time you (get to your destination) **you can hardly walk off the train**, when you're going from Liverpool to Leeds you feel like you have been sitting on one of those upside-down things you tie your bicycle to in the street”

Passenger with sensory/ mobility disability



AUDITORY AND VISUAL ACCESSIBILITY



Inaudible station announcements

Many passengers (including many without disabilities) found it difficult to hear station announcements clearly, especially on busy platforms, often describing them as muffled or indistinct.

There was a desire for better quality announcements and more comprehensive information, including details about delays or closed stations.

This is less of an issue on trains themselves, with passengers generally finding them easier to hear and understand.

“I’m standing right underneath one of the signs. I just won’t be able to read it properly. You know, **the constant announcements I quite enjoy**. I can appreciate that. Quite annoying for other people, but when I travel, I usually travel with suitcases. So, **I use a lot of the, accessibility options like the ramps, the elevators and things like that.**”

Partially blind passenger

Improvements to signage and display boards

While signage at stations is generally rated more highly than other aspects of the service provided to passengers, some feel that there are still opportunities for improvements and greater consistency. For example, having the right information close to your platform when changing trains – rather than having to go to a central display board – and improvements to the level of information displayed outside of carriages.

“**The signage can be really bad or like non-existent**. I’ve found myself having to ask people... especially when you’re having to change trains and run about.”

Passenger with non-visible disabilities

Ensuring quiet spaces or areas for disabled passengers

Passengers often support quiet spaces at stations and carriages on trains. This is seen as particularly beneficial for neurodivergent people or individuals with anxiety issues, providing a more comfortable environment for them. Reference was made to ‘quiet hours’ at supermarkets and how these can be popular with some customers.

THOSE WITH NON-VISIBLE DISABILITIES CAN FIND TRAVEL OVERWHELMING AND SUPPORT INCONSISTENT

Those with non-visible disabilities often intentionally plan to travel at quieter, more manageable times

Avoiding crowds, noise and busyness can help to make the journey less overwhelming and less stressful.

They take steps to familiarise themselves with their journey ahead of time and plan ahead. Route changes can be confusing and stressful.

In addition, travelling with someone else who can help them to navigate the route, and station can be helpful. Earlier announcements and more navigation could help support these passengers more.

Travelling by train can be a positive experience

Although there are some lows, there are those with positive experiences. Some find travelling by train simpler, more convenient and relaxing than driving or taking a bus.

In addition, some are seeing the benefit of improvements on their local lines following refits and modernisation.

However, greater understanding and support from staff would be appreciated, alongside ensuring that spaces are available for those with additional needs, or who can most benefit from them (e.g. quiet carriages).

“I suffer panic attacks and things like that so I don’t tend to travel on my own **and I don’t travel when it’s busy because I can’t deal with the crowds and the noise and when it’s just too stressful**”

Passenger with non-visible disabilities

“Basic training wouldn’t go amiss. Knowing that there are people out there who might have difficulties communicating and who might find things that are **stereotypically easy tasks, not easy when they’re in an overwhelming situation.**”

Passenger with non-visible and physical disabilities

“People with bicycles everywhere and stuff like that and people standing. There’s a couple of times where I’ve been on a train with a reserved seat and you don’t get the seat. **My wife is in a wheelchair and so even if you’re pre-booked for assistance, you’re not guaranteed.**”

Passenger with non-visible disabilities

“I had one good example of a woman being really helpful for me but that came after another member of staff was really unhelpful. And **if someone’s really unhelpful to me, with my mental health, I don’t take it well at all.**”

Passenger with non-visible and physical disabilities

IMPROVING ACCESS FOR PASSENGERS WITH TEMPORARY ACCESSIBILITY NEEDS

Passengers travelling with bikes, buggies and luggage can worry about accessibility

There are concerns that there will not be space on the train to safely store belongings and a lack of help to get on and off the train safely.

This need for space can cause tension with those using wheelchairs who can feel their designated spaces are taken by others. Reference is made to buses where the allocation of buggy spaces is seen as clearer (if not without its challenges).

Concerns are heightened when there are crowds or lifts and escalators are out of service or unavailable. Knowing what is available ahead of time would be appreciated.

Asking for help from other passengers, or staff, can be a challenge

Getting help with luggage, prams and bikes can be a challenge, especially at quieter or unstaffed stations.

Some passengers are more comfortable than others asking for help from other passengers or asking them to move their luggage to make space.

Some passengers need to strategise and plan ahead to make their journey as smooth as possible.

For some, the additional effort leads them towards driving, going by bus or other alternative transport.

Introducing new facilities or services

It was suggested that, for example, offering family friendly activities at stations or on trains might help parents or carers (e.g. something as simple as coloured pencils and paper – as they offer in restaurants – for children on longer journeys)



“I can’t lift my suitcase above my head and I have to ask people for help”

Passenger with additional accessibility needs

IMPROVING ACCESSIBILITY ON THE RAILWAY

The railway has looked to make improvements to the accessibility of services, but all types of passenger – not just those with disabilities or accessibility challenges – would benefit from further improvements.

01

Audibility of announcements

Passengers often refer to the poor sound quality of station announcements and how this can cause stress to their journeys.

02

Consistency of service

In many instances the railway can provide an excellent service to those with accessibility needs but all too often this is inconsistent, passengers are looking for more reliable:

- Staff availability for support
- Toilets that are clean and in working order
- Working lifts

More broadly, information about accessibility facilities (ref. was made to TfL planners) can help but only goes so far. Similarly, if facilities are temporarily out of action at stations (e.g. escalators, lifts) those with accessibility needs would like to know before travelling.

03

Staff training and visible signs of support

Those with disabilities (visible and invisible) or accessibility issues, often referred to the need for a more consistent level of service from staff at stations and on trains.

Beyond this, others think that having more visible signs of support (e.g. 'here to help' badges) and communication campaigns (e.g. call this number for help) would also help.

DIGITAL CONNECTIVITY ON THE RAILWAY



DIGITAL CONNECTIVITY ON THE RAILWAY



Quantitative summary

Of less *relative* importance to other issues – ranked #22 out of 25 – but passengers’ rating of the railway’s performance on this issue is among the lowest. Passengers who are more likely to rate the importance of “*reliable Wi-Fi and mobile reception on trains*” as important include:

- Those aged under 35
- Those travelling with a mobility scooter, bicycle or dog
- Ethnic minority passengers



Qualitative summary

Passengers are generally negative about the quality of Wi-Fi. Wi-Fi is considered unreliable and poor quality when it does work. Many are resigned to poor quality train Wi-Fi and perceive it to be indicative of wider – more important – malaise with the service they receive (e.g. reliability, overcrowding). However, most also see it as a hygiene factor which should be provided, at good quality, especially when passengers are paying high ticket prices (e.g. commuters, business passengers and those travelling long distances).

Key qualitative issues:

- **Lack of, or inconsistent connectivity** – most passengers stated that this is an issue and that they manage around it (e.g. download files or videos to watch ahead of time rather than planning to stream)
- **Reliability is arguably more important than the highest speed** – consistent, reliable connectivity that allows passengers to connect to email or stay connected is valued over inconsistent, faster speeds
- **Hygiene factor** – even among the digitally disadvantaged/ disengaged passengers, there was a sense that high quality digital connectivity should be provided as standard for those who need it



PASSENGER PERCEPTION IS THAT WI-FI IS NOT UP TO STANDARD

Regardless of reason for travel, most passengers feel that the Wi-Fi provided on the train is poor

Especially for passengers travelling over long distances, or who have comparatively expensive tickets, poor Wi-Fi is a frustration.

Many passengers claim they use their own phone 4/5G instead out of necessity rather than choice although “black spots” prevent it from truly solving the problem.

Overall, passengers feel that Wi-Fi is not being invested in and that they are expected to accept a sub-standard quality of service or pay for a better service on top of already high fares. Most feel that good quality, free Wi-Fi should be included in the price of a ticket.

Wi-Fi at the station is a secondary concern over Wi-Fi on the train

Although strong, consistent station Wi-Fi is appreciated, most passengers feel it is less important compared to good quality Wi-Fi on the train.

However, as passengers spend less time on the platform (vs the train), and are less likely to have their phones or laptops out (especially for commuters and business travellers), lack of Wi-Fi is less of an issue.

The exception is during disruption. Then, connectivity on platforms is appreciated to re-plan journeys, and keep others informed of delays.

Ideally, Wi-Fi would work well in both locations (train and platform).

“It’s disgusting with the amount of money we all pay that Wi-Fi isn’t the standard on a train. I just think it’s **absolutely ludicrous. I mean, we live in a digital age now.** Obviously, everybody’s probably experienced it if they’ve been on a train that the signal just drops.”

Non-passenger

“**It’s pointless trying to get on it, as it’s so poor.** It seems that some operators only really want you to use their entertainment services to connect to their Wi-Fi rather than using your laptop to do some work”

Person with sensory or mobility disabilities

MOST PASSENGERS JUST WANT TO BE ABLE TO DO “THE BASICS”

Basic functionality is the minimum expectation, especially on longer journeys:

- Being able to send and receive emails as close to instantly as possible
- Being able to check journeys using apps or online journey planners
- Connecting to Wi-Fi to open ticket apps to show their ticket
- Browsing social media/ internet in general
- Listening to a podcast or music

Some functionality is perceived as a “nice to have” and not always expected:

- Download large files
- Attend video calls
- Access work databases (although some have security restrictions)
- Watch videos and video streaming content e.g. movies, Netflix, YouTube

Many passengers plan ahead and download entertainment or documents they will need in advance, rather than relying on the on-board connectivity.

Not all passengers want full internet functionality on the train for both safety and social reasons

Video calls for work (e.g. MS Teams, Zoom) can be inappropriate to join from public Wi-Fi due to confidentiality concerns and for the comfort of other passengers.

Similarly, watching video without headphones is generally considered anti-social to other passengers and free Wi-Fi could potentially enable that behaviour.

“But obviously the systems that I use, being able to access my online databases and stuff, there's, there's no chance.

There's no chance. And even on Wi-Fi, our systems work, they're enabled. So, it's not like they're encrypted or anything, it's just that sometimes the Wi-Fi is so poor or it drops out every time you go under a tunnel, or it drops out at certain points. It's almost pointless doing it.”

Business passenger

“So long as I can tell people I am on the train and I'll look at the file later, that's okay.”

Commuter

“My nightmare would be sitting next to someone and they're on a Zoom call and I'm trying to just get through this train journey and they're just sitting next to me so loud”

Commuter

PUNCTUALITY & CANCELLATIONS



PUNCTUALITY & CANCELLATIONS - SUMMARY



Quantitative summary

“*Training running on time and not being cancelled*” is the top priority for passengers.

While speed and more trains (for greater seating capacity) are important, the top priority for passengers is that scheduled trains run on time.

It is important to *all* types of passengers but particularly those who have fewer wider issues with train travel (e.g. those without accessibility concerns).



Qualitative summary

While not a specific topic for the qualitative study, this came through strongly when passengers were asked for spontaneous views about what was important to them when travelling on the railway.

The knock-on impact of delays and cancellations is the primary reason why it is so important to passengers (e.g. missed appointments and meetings, having to switch to alternative transport modes etc.). Equally, it is the uncertainty and inability to plan effectively (during periods of disruption) which causes additional frustration.

However, there were passengers who believe that the service has recently improved on some lines and become more reliable.

Key qualitative issues:

- **The high impact caused by delays and cancellations** makes it the #1 issue – for all types of passenger (commuters, business, leisure, personal business)
- **Reliability of trains most important** because it allows you to plan and remain on schedule
- **Pushing people onto alternative transport modes** because they are more reliable (e.g. flying or driving)
- **Reduced commuter days provides some flexibility** – while not ideal, the reduction in the number of days many people spend in the office since Covid and ability to work from home, provides a “work around” for some during disruption
- **Added stress for those with disabilities** – disruption can cause added anxiety for certain passengers (e.g. those with neurodiversity)

“Often I can find a flight from Heathrow to Manchester for £40 (vs £250 by train). I can’t expense that (he can expense rail travel) but I would rather take that (and pay for it out of my own pocket) because it is **quicker, easier, guaranteed a seat and likely to leave reasonably on time.**”

Business traveller

RESEARCH.
FOR DECISION MAKERS.



info@quadrangle.com

RESEARCH SKILLSET + CONSULTANCY MINDSET

 quadrangle