

BRITAIN'S RAILWAY – WHAT MATTERS TO PASSENGERS

A research study conducted for Transport Focus and Network Rail



FINAL REPORT - MARCH 2026

 quadrangle

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INTRODUCTION



INTRODUCTION AND HEADLINE OVERALL FINDINGS



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

”

RESEARCH THEMES

- To provide clear direction about what matters most to passengers making journeys by rail and how this ties in with their perception of how well the railway currently performs.
- To enable analysis by Network Rail region and route, larger train companies, standard geographical areas (including nations)
- To provide comparisons by demographic groups, journey purpose (commuter, business, leisure), ticket type, disability, frequency of rail use, including analysis among current non-users
- Where possible, compare the findings with those from previous research, noting any changes
- To provide the basis for further research to update the findings in the future and/or to provide an indication of areas worthy of more detailed exploration in separate exercises

THE APPROACH

A major quantitative survey involving more than 15,000 online interviews

- 20-minute online survey among rail passengers and non-rail users
- Fieldwork between 12th December 2025 and 9th January 2026
- Participants asked about one of their more frequently undertaken journey types on a “least full” basis (obviously many travellers use the rail for multiple purposes)
- Follow-up qualitative research into key themes reported separately

All passengers	%	Interviews
In last month	52.5	8,016
In last 2-6 months	24.6	3,748
In last 7-12 months	6.6	1,000
Non-rail users (last 12 months)	16.4	2,502
Total		15,226

Current passengers by age	%	Interviews
18-24 years	10.1	1,287
25-34 years	20.5	2,612
35-44 years	19.8	2,528
45-54 years	16.2	2,073
55-64 years	14.8	1,892
65+ years	18.6	2,372
All current passengers		12,764

PRIORITISING WHAT MATTERS – THREE STEPS

Passengers were asked about a journey which they make frequently for commuting, business, leisure or personal business

01

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

02

Satisfaction with the same 25 features

03

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

WHAT MATTERS TO PASSENGERS – 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

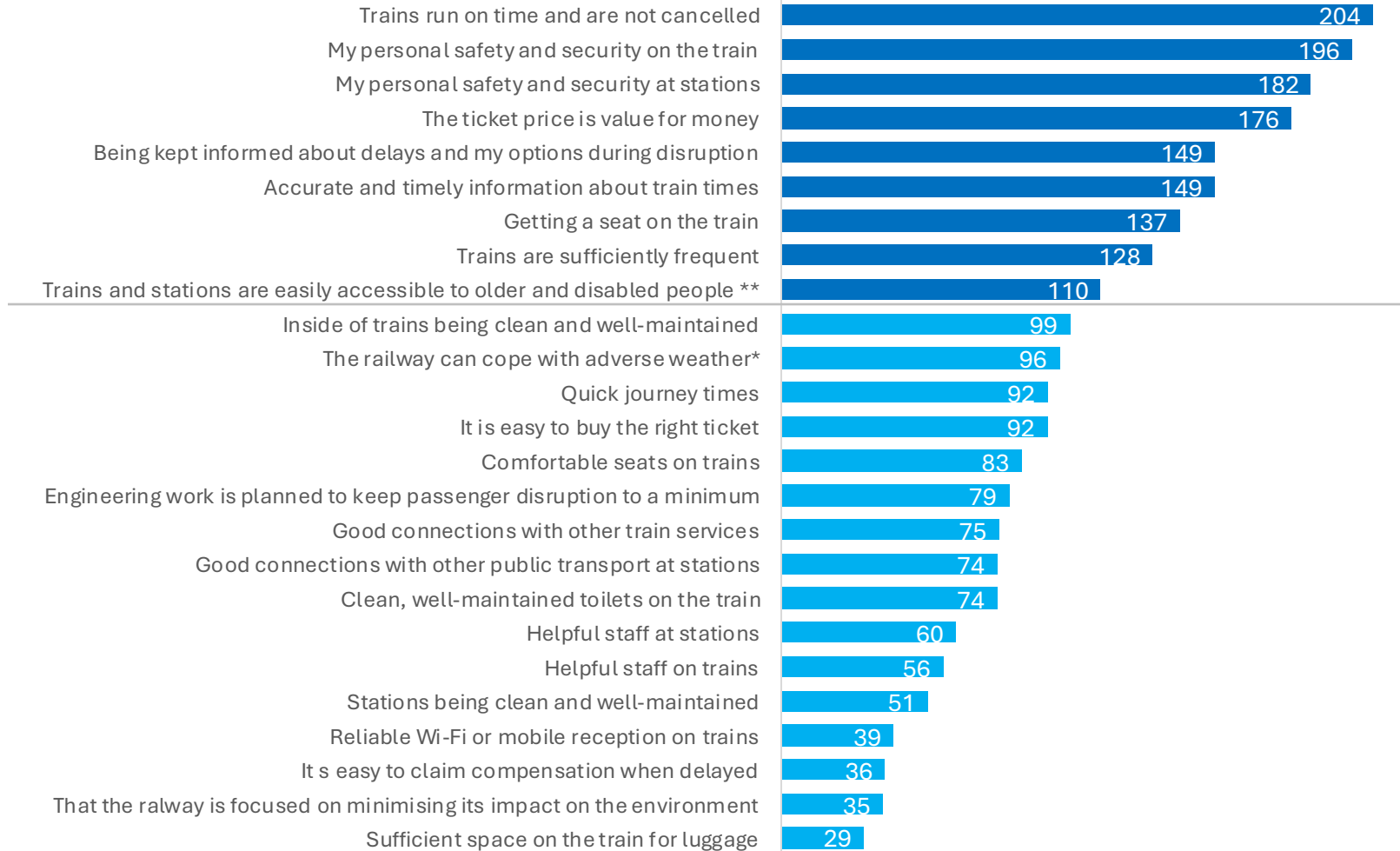
10.
Inside of trains are clean and well maintained
 (99)
 2022 rank #10

* 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.

WHAT MATTERS TO PASSENGERS – THE FULL RESULTS

All current passengers Ranked High-Low importance



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

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

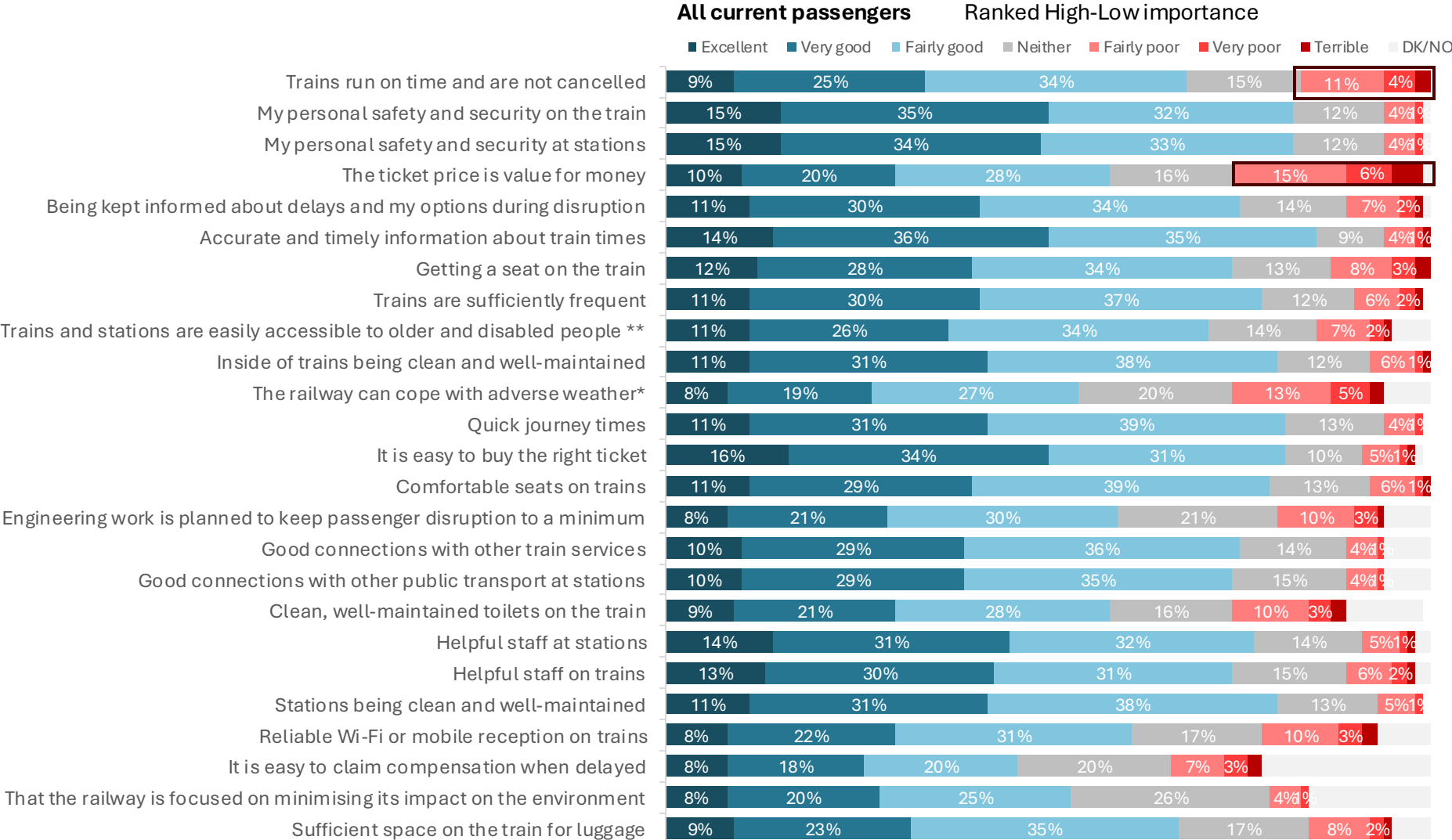
**Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.

MXD1 Please tell us which of the items are most 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 also received among the highest 'poor' scores

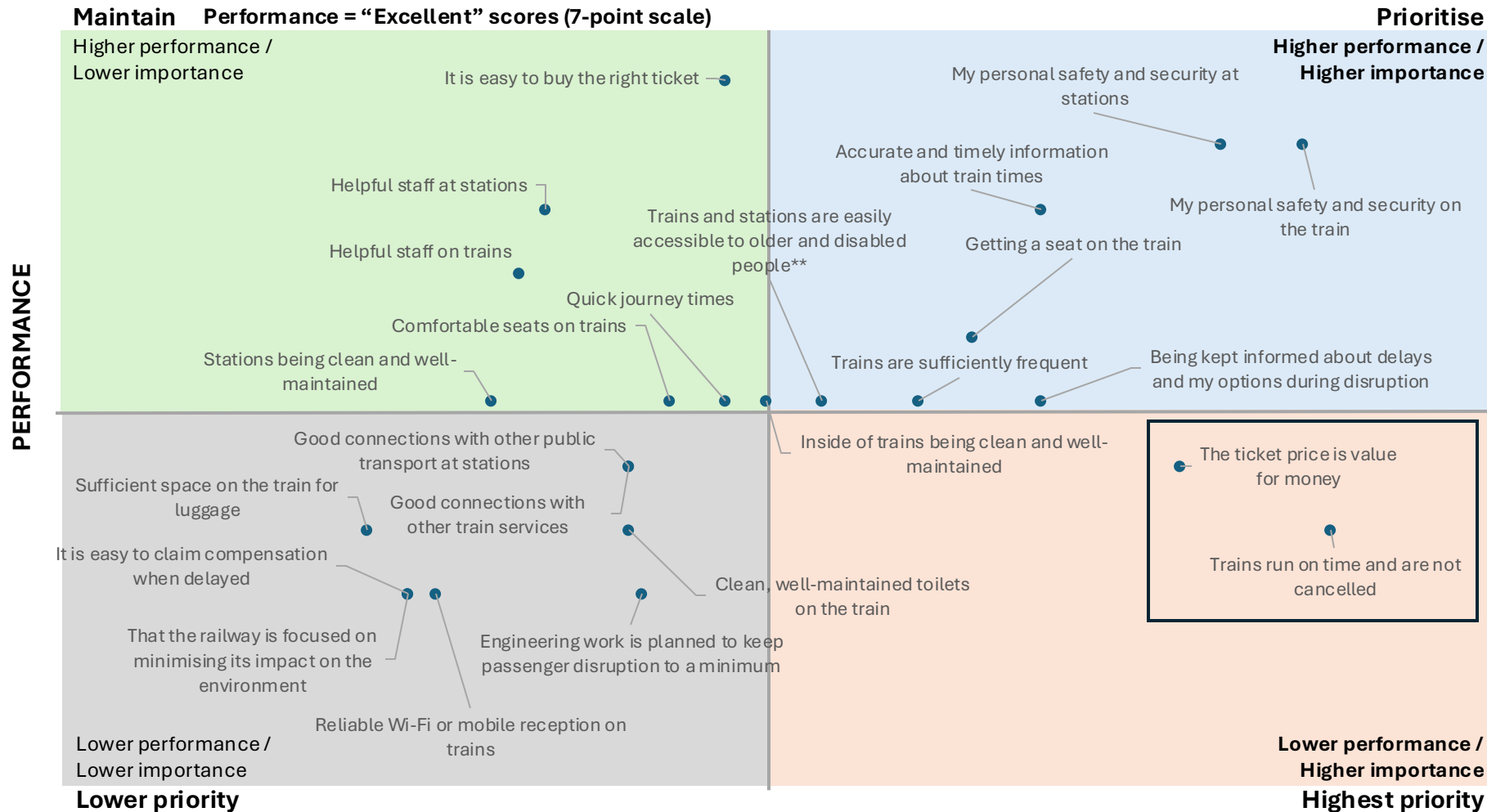


Exact wording presented
 * A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat
 ** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.

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)

IMPORTANCE VS. PERFORMANCE - CURRENT PASSENGERS

Whilst both Personal safety and security at stations and on the train are high priorities, performance is perceived to be relatively good. The ticket price is value for money and trains run on time and are not cancelled, are also High Priority, but performance is poorer.

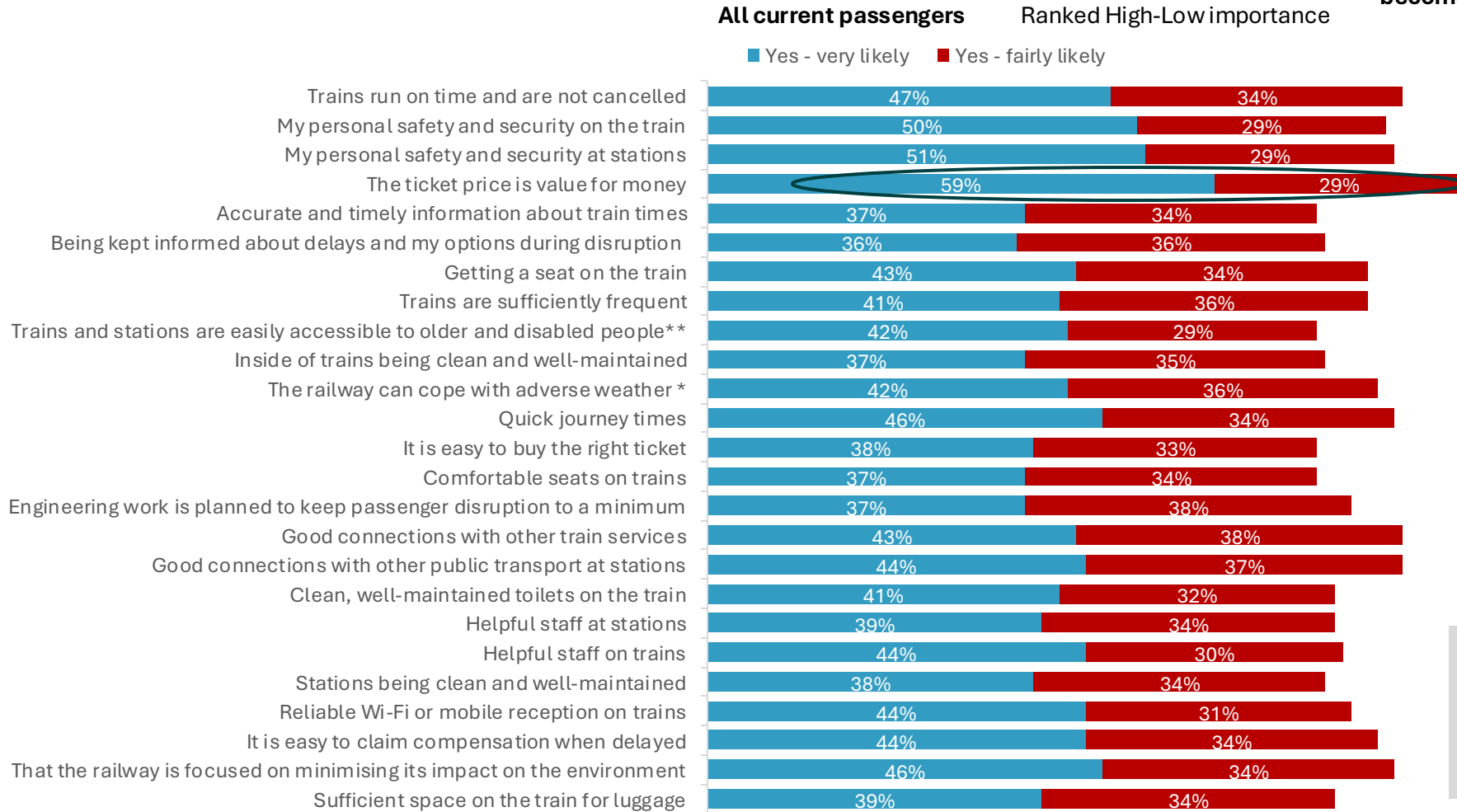


Exact wording presented
 * A railway that can cope with adverse weather events e.g. snow, wind, flooding and extreme heat
 ** Trains and stations easily accessible by older and disabled people and those with pushchairs, bicycles, luggage etc.

LIKELIHOOD TO TRAVEL MORE BY TRAIN IF IMPROVEMENT MADE

Current passengers Non-rail users

As in 2022, current passengers are most likely to say that they will travel more by train if the ticket price becomes better value for money



Each survey participant was only asked about the seven most important things to them personally, when travelling by rail

QB3. We would now like you to think about some of the aspects that you mentioned as most important to you when travelling by train. Taking each of the following in turn, if the railway was to improve on each of the following, do you think you would in practice travel by train more often?

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.

WHAT MATTERS BY NETWORK RAIL REGIONS AND ROUTES



WHAT MATTERS BY NR REGION

Little difference between the regions, with marginal differences including getting a seat on the train being a lower priority in the Southern region, but the railway being able to cope with adverse weather events is a higher priority

Ranked High-Low importance for all current passengers

	Total	NR Region				
		Eastern Region	North West & Central Region	Scotland	Southern Region	Wales & Western Region
Trains run on time and are not cancelled	204	205	204	203	199	206
My personal safety and security on the train	196	196	197	196	198	193
My personal safety and security at stations	182	182	183	182	184	179
The ticket price is value for money	176	178	173	179	171	179
Being kept informed about delays and my options during disruption	149	149	150	141	151	149
Accurate and timely information about train times	149	149	150	144	150	149
Getting a seat on the train	137	136	140	144	126	148
Trains are sufficiently frequent	128	127	128	130	130	127
Trains and stations are easily accessible to older and disabled people**	110	109	110	115	112	107
Inside of trains being clean and well-maintained	99	98	99	108	97	101
The railway can cope with adverse weather*	96	95	95	97	101	91
Quick journey times	92	92	90	89	97	87
It is easy to buy the right ticket	92	93	92	93	89	91
Comfortable seats on trains	83	80	85	92	78	88
Engineering work is planned to keep passenger disruption to a minimum	79	79	77	72	84	76
Good connections with other train services	75	77	74	71	76	74
Good connections with other public transport at stations	74	76	73	72	77	72
Clean, well-maintained toilets on the train	74	73	73	80	74	77
Helpful staff at stations	60	60	59	62	60	63
Helpful staff on trains	56	56	54	59	55	58
Stations being clean and well-maintained	51	50	51	52	51	50
Reliable Wi-Fi or mobile reception on trains	39	39	41	35	39	38
It is easy to claim compensation when delayed	36	35	35	31	37	35
That the railway is focused on minimising its impact on the environment	35	37	38	26	38	34
Sufficient space on the train for luggage	29	30	30	26	27	28
	Base: 12764	4014	3126	997	2784	1843

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

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.

WHAT MATTERS BY EASTERN REGION

The minor differences between routes in the Eastern Region are similar to those seen in 2022, including greater importance for getting a seat on the train on the East Coast and North & East routes. Trains being sufficiently frequent is a slightly lower priority on the East Coast

Ranked High-Low importance for all current passengers

	Total	Eastern Region	Anglia Route	East Coast Route	East Midlands Route	North & East Route
Trains run on time and are not cancelled	204	205	199	206	203	212
My personal safety and security on the train	196	196	197	197	195	194
My personal safety and security at stations	182	182	185	183	182	180
The ticket price is value for money	176	178	176	178	176	183
Being kept informed about delays and my options during disruption	149	149	147	148	152	149
Accurate and timely information about train times	149	149	149	144	151	150
Getting a seat on the train	137	136	122	148	128	148
Trains are sufficiently frequent	128	127	131	118	125	131
Trains and stations are easily accessible to older and disabled people**	110	109	110	112	109	104
Inside of trains being clean and well-maintained	99	98	98	99	98	99
The railway can cope with adverse weather*	96	95	94	98	95	92
Quick journey times	92	92	94	91	95	89
It is easy to buy the right ticket	92	93	92	93	91	97
Comfortable seats on trains	83	80	76	86	79	82
Engineering work is planned to keep passenger disruption to a minimum	79	79	84	76	79	75
Good connections with other train services	75	77	84	72	75	74
Good connections with other public transport at stations	74	76	85	71	73	71
Clean, well-maintained toilets on the train	74	73	72	73	74	74
Helpful staff at stations	60	60	61	60	60	60
Helpful staff on trains	56	56	55	55	56	57
Stations being clean and well-maintained	51	50	52	49	53	48
Reliable Wi-Fi or mobile reception on trains	39	39	39	39	43	34
It is easy to claim compensation when delayed	36	35	36	35	37	32
That the railway is focused on minimising its impact on the environment	35	37	37	36	41	34
Sufficient space on the train for luggage	29	30	26	33	31	29
	Base: 12764	4014	1206	916	850	1042

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

Exact wording presented

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

WHAT MATTERS BY NORTH WEST & CENTRAL REGION

Priorities remain very consistent across North West & Central routes, closely matching the national picture – as was the case in 2022.

Ranked High-Low importance for all current passengers

	Total	North West & Central Region	Central Route	North West Route	WCML South Route
Trains run on time and are not cancelled	204	204	200	208	199
My personal safety and security on the train	196	197	199	196	195
My personal safety and security at stations	182	183	186	182	182
The ticket price is value for money	176	173	172	172	176
Being kept informed about delays and my options during disruption	149	150	152	150	148
Accurate and timely information about train times	149	150	151	149	147
Getting a seat on the train	137	140	135	146	133
Trains are sufficiently frequent	128	128	127	131	121
Trains and stations are easily accessible to older and disabled people**	110	110	111	108	115
Inside of trains being clean and well-maintained	99	99	100	98	99
The railway can cope with adverse weather*	96	95	96	96	92
Quick journey times	92	90	90	89	93
It is easy to buy the right ticket	92	92	92	91	95
Comfortable seats on trains	83	85	82	86	88
Engineering work is planned to keep passenger disruption to a minimum	79	77	73	80	76
Good connections with other train services	75	74	72	74	75
Good connections with other public transport at stations	74	73	73	72	77
Clean, well-maintained toilets on the train	74	73	75	73	74
Helpful staff at stations	60	59	58	60	57
Helpful staff on trains	56	54	53	56	53
Stations being clean and well-maintained	51	51	54	49	51
Reliable Wi-Fi or mobile reception on trains	39	41	44	38	43
It is easy to claim compensation when delayed	36	35	37	34	37
That the railway is focused on minimising its impact on the environment	35	38	40	36	41
Sufficient space on the train for luggage	29	30	30	29	33
	Base: 12764	3126	1046	1493	587

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

Exact wording presented

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WHAT MATTERS BY SOUTHERN REGION

Some minor differences between the Southern routes, including personal safety on the train and at stations being a higher priorities on the Kent route, and trains being sufficiently frequent and quick journey times more important on the Sussex route

Ranked High-Low importance for all current passengers

	Total	Southern Region	Kent Route	Sussex Route	Wessex Route
Trains run on time and are not cancelled	204	199	193	204	202
My personal safety and security on the train	196	198	203	196	195
My personal safety and security at stations	182	184	190	182	180
The ticket price is value for money	176	171	163	173	175
Being kept informed about delays and my options during disruption	149	151	149	155	150
Accurate and timely information about train times	149	150	148	152	152
Getting a seat on the train	137	126	125	124	129
Trains are sufficiently frequent	128	130	127	137	127
Trains and stations are easily accessible to older and disabled people**	110	112	122	109	106
Inside of trains being clean and well-maintained	99	97	99	95	97
The railway can cope with adverse weather*	96	101	100	104	99
Quick journey times	92	97	95	100	97
It is easy to buy the right ticket	92	89	84	89	92
Comfortable seats on trains	83	78	79	76	78
Engineering work is planned to keep passenger disruption to a minimum	79	84	81	84	86
Good connections with other train services	75	76	75	79	76
Good connections with other public transport at stations	74	77	77	79	74
Clean, well-maintained toilets on the train	74	74	77	71	73
Helpful staff at stations	60	60	62	56	62
Helpful staff on trains	56	55	57	51	56
Stations being clean and well-maintained	51	51	52	50	51
Reliable Wi-Fi or mobile reception on trains	39	39	38	34	43
It is easy to claim compensation when delayed	36	37	42	35	33
That the railway is focused on minimising its impact on the environment	35	38	38	38	38
Sufficient space on the train for luggage	29	27	26	27	28
	Base: 12764	2784	933	758	1093

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

Exact wording presented

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

WHAT MATTERS BY WALES & WESTERN REGION

Getting a seat on the train is more important on the Wales and Western routes, with trains running on time and not being cancelled even more important on the Wales route

Ranked High-Low importance for all current passengers

	Total	Wales & Western Region	Wales Route	Western Route
Trains run on time and are not cancelled	204	206	210	205
My personal safety and security on the train	196	193	196	191
My personal safety and security at stations	182	179	182	177
The ticket price is value for money	176	179	176	181
Being kept informed about delays and my options during disruption	149	149	146	151
Accurate and timely information about train times	149	149	147	151
Getting a seat on the train	137	148	156	144
Trains are sufficiently frequent	128	127	126	127
Trains and stations are easily accessible to older and disabled people**	110	107	109	107
Inside of trains being clean and well-maintained	99	101	106	99
The railway can cope with adverse weather*	96	91	86	94
Quick journey times	92	87	84	88
It is easy to buy the right ticket	92	91	86	94
Comfortable seats on trains	83	88	92	86
Engineering work is planned to keep passenger disruption to a minimum	79	76	74	77
Good connections with other train services	75	74	76	74
Good connections with other public transport at stations	74	72	72	72
Clean, well-maintained toilets on the train	74	77	78	76
Helpful staff at stations	60	63	65	61
Helpful staff on trains	56	58	61	57
Stations being clean and well-maintained	51	50	52	49
Reliable Wi-Fi or mobile reception on trains	39	38	34	40
It is easy to claim compensation when delayed	36	35	35	35
That the railway is focused on minimising its impact on the environment	35	34	29	36
Sufficient space on the train for luggage	29	28	25	29
Base:	12764	1843	620	1223

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

Exact wording presented

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

PRIORITIES FOR OTHER KEY SUB-GROUPS



AGE / GENDER + DISABILITIES + YOUR NEEDS/WHAT YOU TAKE WITH YOU + ETHNICITY

 quadrangle

WHAT MATTERS BY AGE & GENDER

Personal safety and security on the train and at stations are particularly important to females. Importance of **seating** increases with age. Trains and stations being easily accessible is more important than average to females and both younger and older cohorts.

Ranked High-Low importance for all current passengers	Total	Gender		Age					
		Male	Female	18-24	25-34	35-44	45-54	55-64	65+
Trains run on time and are not cancelled	204	201	206	191	181	195	215	224	218
My personal safety and security on the train	196	179	213	198	199	200	196	191	192
My personal safety and security at stations	182	165	200	187	187	188	182	176	175
The ticket price is value for money	176	180	171	160	155	171	191	195	183
Being kept informed about delays and my options during disruption	149	142	156	163	154	148	147	147	141
Accurate and timely information about train times	149	148	150	157	151	146	152	149	144
Getting a seat on the train	137	138	136	94	101	119	142	168	190
Trains are sufficiently frequent	128	134	122	115	111	123	143	139	137
Trains and stations are easily accessible to older and disabled people**	110	98	122	122	127	113	91	93	111
Inside of trains being clean and well-maintained	99	101	98	87	96	100	98	102	109
The railway can cope with adverse weather*	96	95	97	106	106	100	94	86	84
Quick journey times	92	101	83	96	91	94	99	91	82
It is easy to buy the right ticket	92	99	85	87	86	86	97	100	95
Comfortable seats on trains	83	91	75	60	72	78	82	92	107
Engineering work is planned to keep passenger disruption to a minimum	79	79	78	84	85	84	80	74	66
Good connections with other train services	75	78	72	80	79	77	79	74	64
Good connections with other public transport at stations	74	77	72	83	81	78	77	69	61
Clean, well-maintained toilets on the train	74	77	72	66	77	76	70	71	80
Helpful staff at stations	60	60	61	61	62	60	55	59	65
Helpful staff on trains	56	56	56	55	57	55	51	55	61
Stations being clean and well-maintained	51	53	49	54	58	56	46	44	45
Reliable Wi-Fi or mobile reception on trains	39	42	36	55	49	45	33	30	25
It is easy to claim compensation when delayed	36	39	33	57	49	40	30	25	20
That the railway is focused on minimising its impact on the environment	35	37	33	47	49	41	29	23	23
Sufficient space on the train for luggage	29	31	26	35	37	30	23	22	24
Base:	12764	6369	6329	1287	2612	2528	2073	1892	2372

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

Exact wording presented

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

WHAT MATTERS BY DISABILITY

Those with a disability broadly prioritise the same issues as the wider population, but the strength of importance varies depending on their specific needs, while **accessibility** is understandably important to all.

Ranked High-Low importance for all current passengers

	Total	Disability								
		Any	None	Sensory	Mobility	Mental health	Learning & Memory	Stamina & Breathing	Social & Behavioural	Other
Trains run on time and are not cancelled	204	195	209	188	182	199	183	190	206	203
My personal safety and security on the train	196	202	193	197	207	204	195	207	200	198
My personal safety and security at stations	182	188	179	183	193	191	184	193	187	182
The ticket price is value for money	176	165	181	162	152	170	153	157	168	178
Being kept informed about delays and my options during disruption	149	147	151	142	135	155	152	147	163	152
Accurate and timely information about train times	149	141	153	136	126	148	141	138	155	144
Getting a seat on the train	137	145	134	149	173	127	120	148	123	161
Trains are sufficiently frequent	128	117	134	114	102	123	112	108	122	123
Trains and stations are easily accessible to older and disabled people**	110	144	93	139	183	132	151	168	131	136
Inside of trains being clean and well-maintained	99	94	102	96	98	88	88	92	85	98
The railway can cope with adverse weather*	96	94	97	92	86	99	94	94	101	83
Quick journey times	92	78	99	78	64	82	78	70	85	76
It is easy to buy the right ticket	92	87	94	89	79	89	90	88	86	89
Comfortable seats on trains	83	83	83	89	101	70	75	83	69	87
Engineering work is planned to keep passenger disruption to a minimum	79	75	81	75	67	79	76	67	82	74
Good connections with other train services	75	74	76	75	68	80	81	72	75	68
Good connections with other public transport at stations	74	75	74	73	71	79	82	74	76	69
Clean, well-maintained toilets on the train	74	74	75	78	80	67	72	76	62	81
Helpful staff at stations	60	72	54	77	85	67	80	79	66	73
Helpful staff on trains	56	67	50	72	80	61	74	75	60	68
Stations being clean and well-maintained	51	48	52	50	49	46	50	46	45	44
Reliable Wi-Fi or mobile reception on trains	39	39	39	39	30	42	50	36	45	32
It is easy to claim compensation when delayed	36	34	37	37	27	37	42	30	44	27
That the railway is focused on minimising its impact on the environment	35	35	35	42	34	37	46	36	37	29
Sufficient space on the train for luggage	29	29	28	31	29	28	31	29	28	24
Base:	12764	4272	8291	860	1583	1807	449	830	616	242

Disability definitions in notes page

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

Exact wording presented

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

WHAT MATTERS BY ACCESSIBILITY NEEDS

Aside from the trains and stations being easily accessible, **personal safety and security** (both on the train and at stations) are of above average importance to many across these diverse audiences. Other priorities reflect their specific needs (e.g. helpful staff at stations and on trains are more important for those with a mobility scooter or wheelchair)

Ranked High-Low importance for all current passengers

	Total	Accessibility needs							
		Any	None	Use a lift at station	Step-free	Bicycle	Dog	Mobility scooter/ wheelchair	Pushchair/ buggy/ pram
Trains run on time and are not cancelled	204	187	217	188	177	179	182	136	190
My personal safety and security on the train	196	203	191	205	204	163	188	179	211
My personal safety and security at stations	182	190	176	192	191	150	175	167	198
The ticket price is value for money	176	156	191	156	147	165	162	124	153
Being kept informed about delays and my options during disruption	149	147	151	148	138	135	134	123	153
Accurate and timely information about train times	149	140	156	141	128	139	136	119	143
Getting a seat on the train	137	135	139	136	159	107	131	113	112
Trains are sufficiently frequent	128	110	142	109	100	127	120	87	111
Trains and stations are easily accessible to older and disabled people**	110	142	84	141	175	113	124	186	167
Inside of trains being clean and well-maintained	99	98	101	98	97	93	98	97	96
The railway can cope with adverse weather*	96	97	95	97	91	102	89	97	99
Quick journey times	92	78	103	77	66	101	90	73	76
It is easy to buy the right ticket	92	83	98	83	80	97	88	83	79
Comfortable seats on trains	83	83	83	84	94	77	86	89	66
Engineering work is planned to keep passenger disruption to a minimum	79	76	80	76	67	84	72	77	85
Good connections with other train services	75	77	74	76	73	98	86	78	77
Good connections with other public transport at stations	74	78	72	77	74	98	86	85	80
Clean, well-maintained toilets on the train	74	79	70	79	82	82	79	93	75
Helpful staff at stations	60	69	53	67	86	66	76	102	67
Helpful staff on trains	56	64	49	62	80	64	72	98	60
Stations being clean and well-maintained	51	53	49	53	52	60	57	67	52
Reliable Wi-Fi or mobile reception on trains	39	41	37	40	36	55	52	61	35
It is easy to claim compensation when delayed	36	37	35	37	33	49	40	50	40
That the railway is focused on minimising its impact on the environment	35	39	32	39	37	53	43	65	42
Sufficient space on the train for luggage	29	37	22	38	35	44	36	51	33
	Base: 12764	5683	7081	4500	1416	247	451	283	510

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

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.

WHAT MATTERS BY ETHNICITY

Personal security and safety on trains and at stations are the most important issues for ethnic minority passengers – ahead of the performance of the railway and value for money

Ranked High-Low importance for all current passengers

	Total	Ethnicity				
		White	Mixed/ Multiple ethnic group	Asian/ Asian British	Black/ African/ Caribbean/ Black British	Other ethnic group
Trains run on time and are not cancelled	204	208	187	192	171	191
My personal safety and security on the train	196	195	209	199	205	208
My personal safety and security at stations	182	180	196	187	194	197
The ticket price is value for money	176	181	149	161	139	165
Being kept informed about delays and my options during disruption	149	148	152	154	156	138
Accurate and timely information about train times	149	149	151	151	153	134
Getting a seat on the train	137	146	103	101	87	104
Trains are sufficiently frequent	128	131	117	118	103	124
Trains and stations are easily accessible to older and disabled people**	110	107	120	111	136	119
Inside of trains being clean and well-maintained	99	100	100	93	102	101
The railway can cope with adverse weather*	96	94	100	101	105	120
Quick journey times	92	91	91	104	94	92
It is easy to buy the right ticket	92	94	80	84	82	84
Comfortable seats on trains	83	85	75	69	76	72
Engineering work is planned to keep passenger disruption to a minimum	79	78	82	85	81	83
Good connections with other train services	75	74	79	81	81	78
Good connections with other public transport at stations	74	72	81	86	88	83
Clean, well-maintained toilets on the train	74	74	76	74	82	67
Helpful staff at stations	60	61	62	57	61	58
Helpful staff on trains	56	56	57	52	55	53
Stations being clean and well-maintained	51	49	61	55	65	54
Reliable Wi-Fi or mobile reception on trains	39	36	52	53	50	64
It is easy to claim compensation when delayed	36	33	44	55	48	36
That the railway is focused on minimising its impact on the environment	35	33	46	45	52	38
Sufficient space on the train for luggage	29	27	35	34	36	39
	Base: 12764	10575	395	714	933	75

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

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.

ATTRACTING MORE PEOPLE TO THE RAILWAY

Non-rail users and lapsed passengers defined as those who haven't travelled by train in the past 12 months



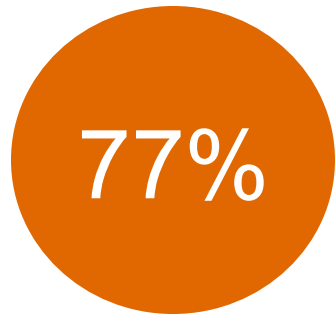
ATTRACTING MORE PEOPLE TO TRAVELLING BY TRAIN

LAPSED PASSENGERS AND NON-USERS NEED LOWER FARES

Last travelled by train in 2024 or before

01

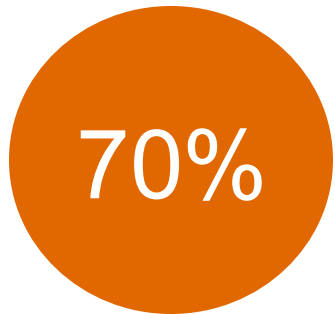
Lower fares is the key motivating factor in encouraging those who could use trains, to get on board.



Would be more likely to travel by train if it cost less to travel by train at all times

02

Not being able to guarantee a seat means seven-in-ten non-users are voting with their feet.



Would be more likely to travel by train if you could always guarantee a seat

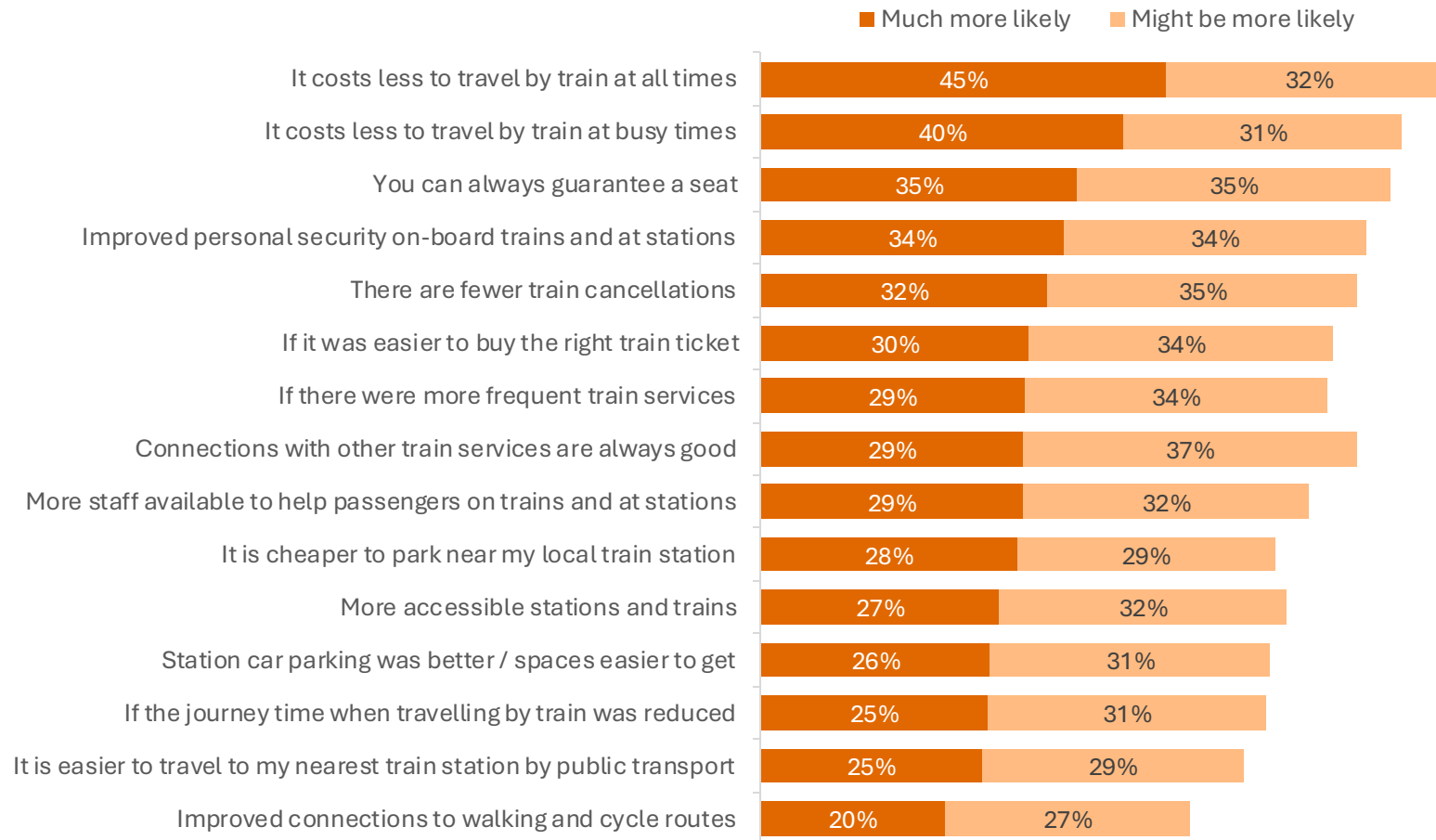
03

Personal security, Cancellations and Connections are tied for impact.



NON-USERS NEED LOWER FARES TO GET THEM BACK ON THE RAILWAY

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



Cheaper fares – especially at busy times – are by far the biggest motivators of current non-users.

77% say lower fares at any time would make it more/much more likely that they would take the train again.

Around a third of lapsed/non-users would also **be much more likely** to increase train usage if there were **sufficient seats, improved personal security and there were fewer cancellations.**

Whilst improving **connections to walking and cycling** routes is **far less motivating**, still just under half would be encouraged to use trains if this were achieved

QD1. We'd now like to know what, if anything, might encourage you to travel by train again in the future. Looking at the following list, please rate the extent to which these changes would make you more likely to travel by train

Base: All rail non-users (n=2,502)

HEADLINE FINDINGS SUMMARY



HEADLINE FINDINGS (I)

01

Trains running on time and not being cancelled is the top priority for the railway (up from #2 in 2022).

Trains running sufficiently frequently is ranked #8 down from #3 in 2022.

02

For current passengers, Personal Security and Safety – both at stations and on trains – have become more important. As additional qualitative research has indicated, this appears to be associated with a general increase in public concern about crime and high profile incidents on the railway late 2025.

However, the railway's performance in this area is considered relatively good.

03

Two of the highest priority areas – trains running on time and not being cancelled, and the ticket price being value for money – are also among the lowest performing.

04

Lower cost of rail fares is the single biggest factor that could get non-users back onto the railway.

HEADLINE FINDINGS (II)

05

The environmental impact of the railway is doubly important to under 35s compared to over 55s, but is still far less important than the trains running on time and not being cancelled, personal security (on the train and at stations) and the ticket price being value for money.

06

While most passenger types – across location, demographics and journey type – have very similar priorities, the differences in the views of disabled passengers and those with accessibility issues, illustrates that we should not treat all passengers the same.

07

Some apparently lower priority areas could have an outsize impact on increasing train use.

Quick journey times and the railway minimising its impact on the environment are equal 5th in likelihood to increase train use (*very likely*) among those for whom it is a priority.

DEEP DIVES



PUNCTUALITY & CANCELLATIONS



PUNCTUALITY & CANCELLATIONS - HEADLINES

01

Reliability is the top priority for passengers – same journey time, but trains running on time – over the speed of the service or avoiding cancellations

02

While passengers have a preference for reliability over more seats, views are more evenly split among specific audiences, in particular those with accessibility issues

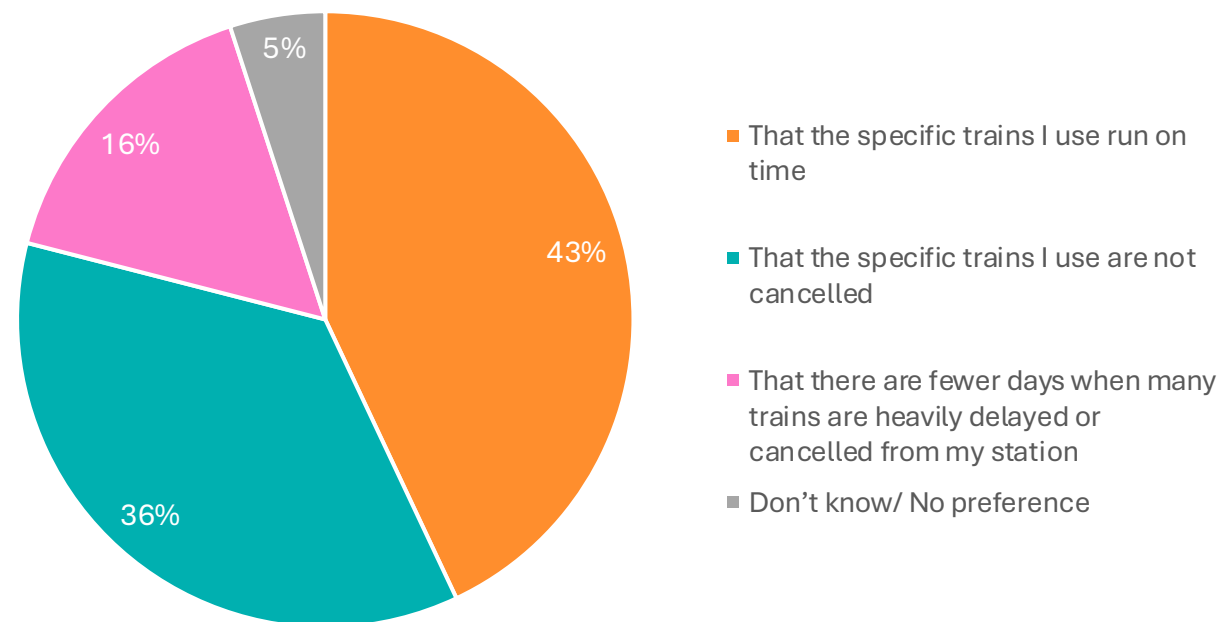
Opinions are relatively consistent across passenger groups

PASSENGERS PREFER TRAINS TO RUN ON TIME OVER NON-CANCELLATIONS TO THEIR TRAIN

The desire for “fewer days when many trains are cancelled or delayed” **decreases with age** (22% for under 25s to 9% for 65+ yrs).

Avoiding cancellations to specific trains is preferred by those who **need step-free access** (39% vs 37% for running on time).

Preference – on time vs reduced cancellations

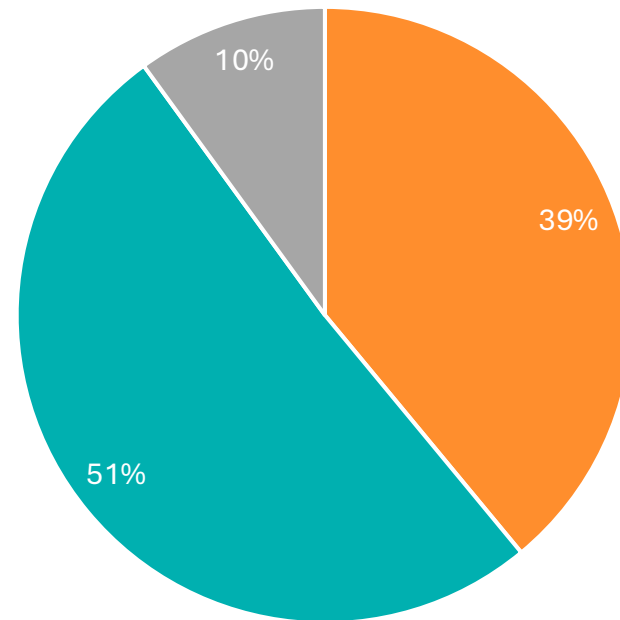


PUNCTUALITY IS PREFERRED OVER MORE SEATS AND GREATER CHANCE OF DELAYS

Accessibility issues influence responses, those with a mobility disability or requiring step-free access to trains are **equally as likely to desire a train with extra seats, as their train running on time.**

Those travelling for **business, personal business** and **commuters**, are more likely to **prioritise their trains running on time** (all 55%). The same applies to more frequent rail travellers (weekly - 54%).

Preference – extra train vs running to schedule



- Run extra trains so providing more seats, even if it increases the chance of delays
- Run the same number of trains but on time, even if each one is busier than ideal
- Don't know/ No preference

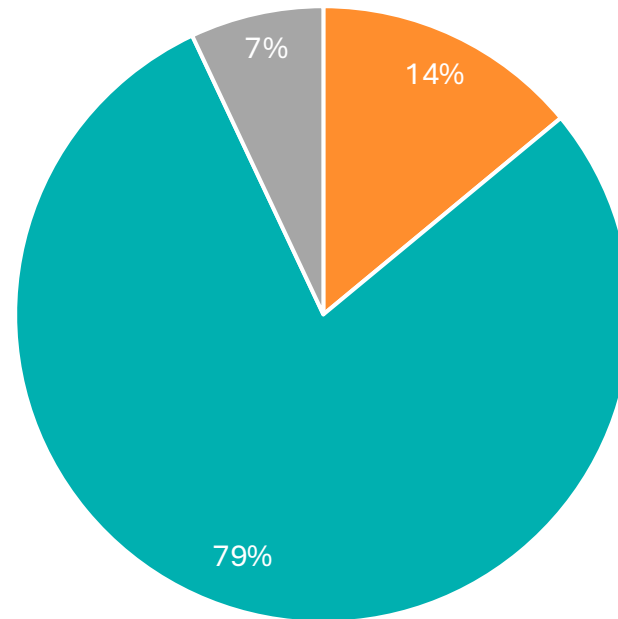
PASSENGERS HAVE A STRONG PREFERENCE FOR RELIABILITY OVER SPEEDIER SERVICES WITH AN INCREASED CHANCE OF DELAYS

Faster journeys with the threat of potential delays is **more popular with younger passengers** (21% under 35s vs 7% for 55 yrs+).

Faster journeys are also more popular with those who travel with different items including **bicycles** (32%), **wheelchairs/ mobility scooters** (31%) and **pushchairs/ buggies** (19%).

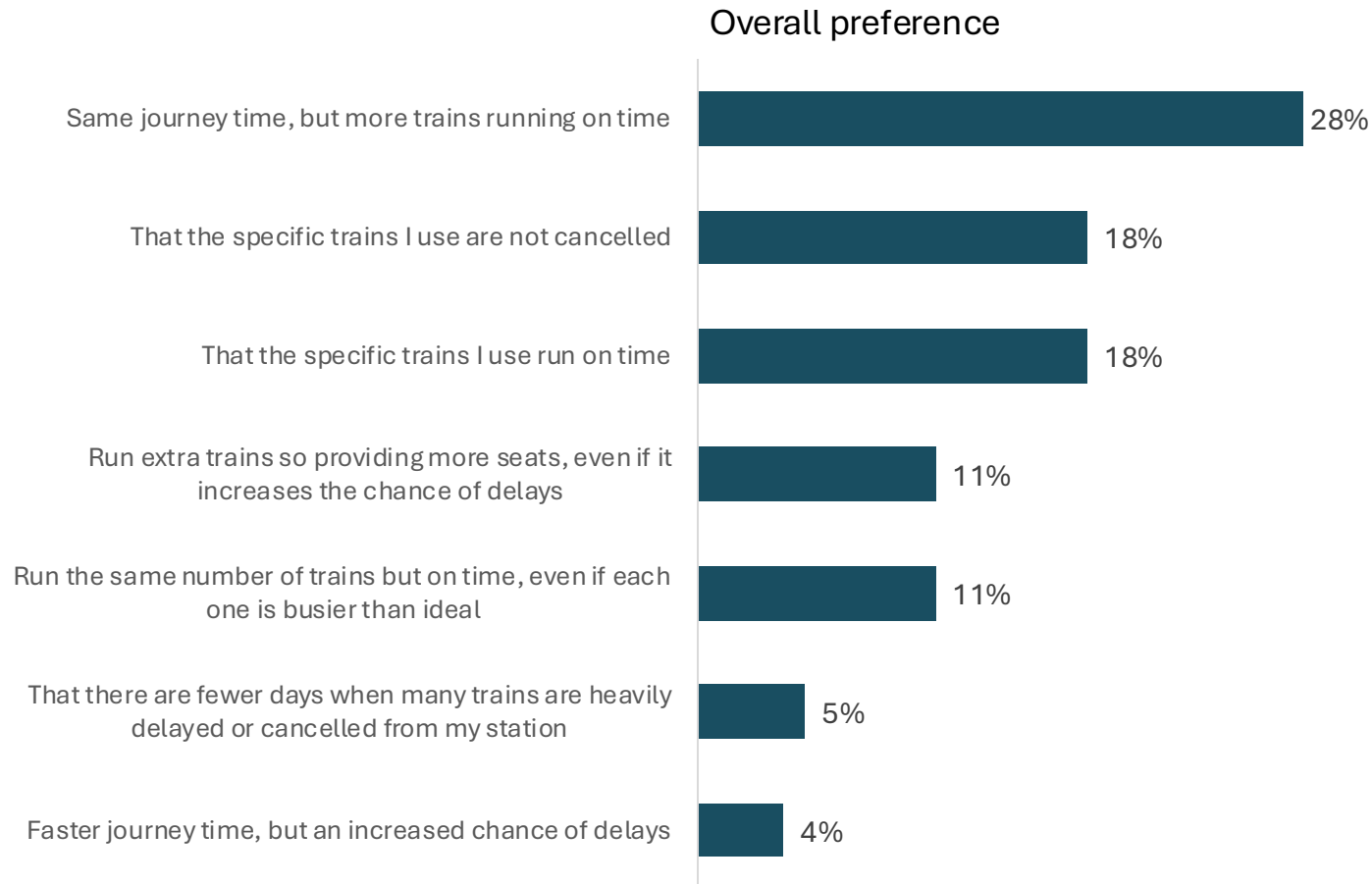
Speed is also more of a priority for those travelling on **airport services** (25%).

Preference – Speedier journeys vs running to schedule



- Faster journey time, but an increased chance of delays
- Same journey time, but more trains running on time
- Don't know/ No preference

CLEAR PREFERENCE FOR CURRENT SERVICES TO RUN ON TIME OVER MORE SERVICES WITH GREATER RISK OF DELAY



Very few differences in priorities across passenger types:

However, in **Wales** there is a higher demand for extra trains to be run, providing more seats (15%)

Leisure Passengers are more likely to prioritise that their specific **train is not cancelled** (20%) vs **Business Passengers** (13%)

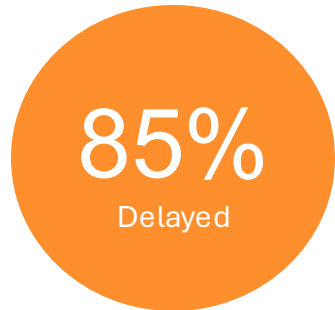
MANAGING DISRUPTION



MANAGING DISRUPTION - HEADLINES

01

Most current passengers have experienced some sort of delay in the past 12 months – with around three-in-five experiencing at least an occasional delay.



02

Less than half are satisfied with how delays are handled.



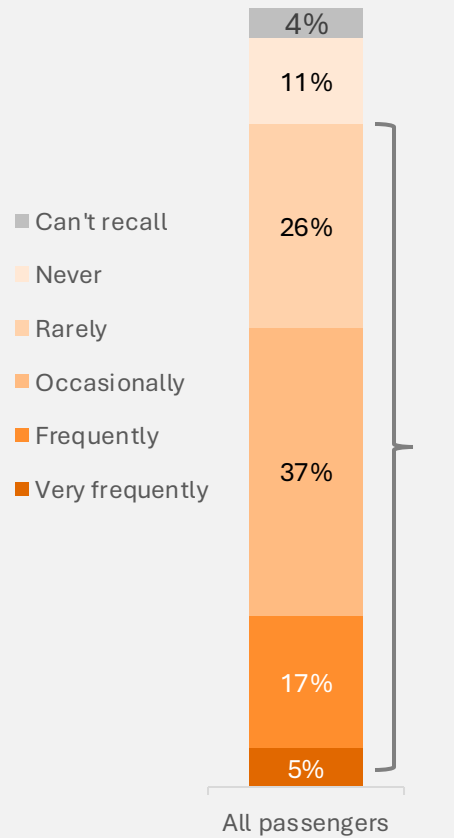
03

Providing information to passengers in event of delay, is the key issue in improving satisfaction with delay resolution – passengers don't like being kept in the dark

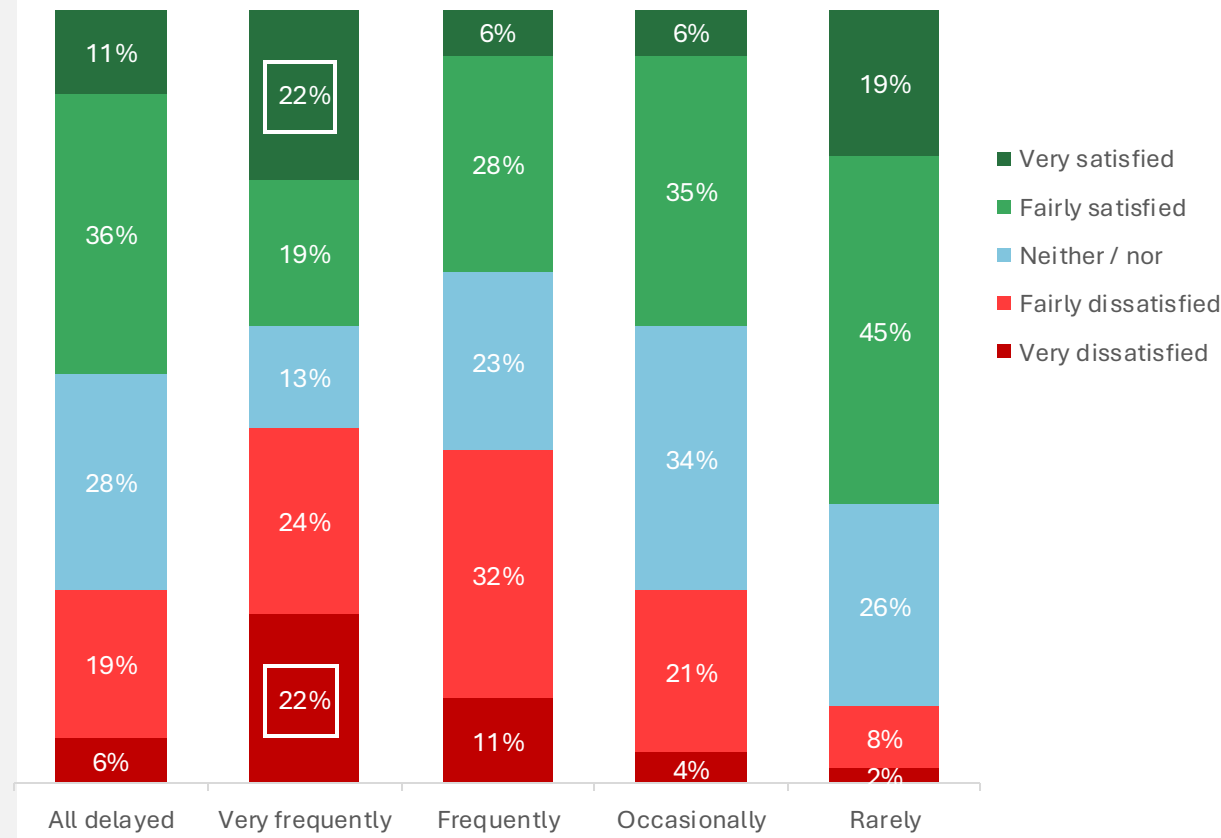


AROUND 3-IN-5 EXPERIENCE UNPLANNED DELAYS AT LEAST OCCASIONALLY, AND THESE DELAYS DRIVE DISSATISFACTION

Frequency of delays



Satisfaction with how most recent disruption was handled



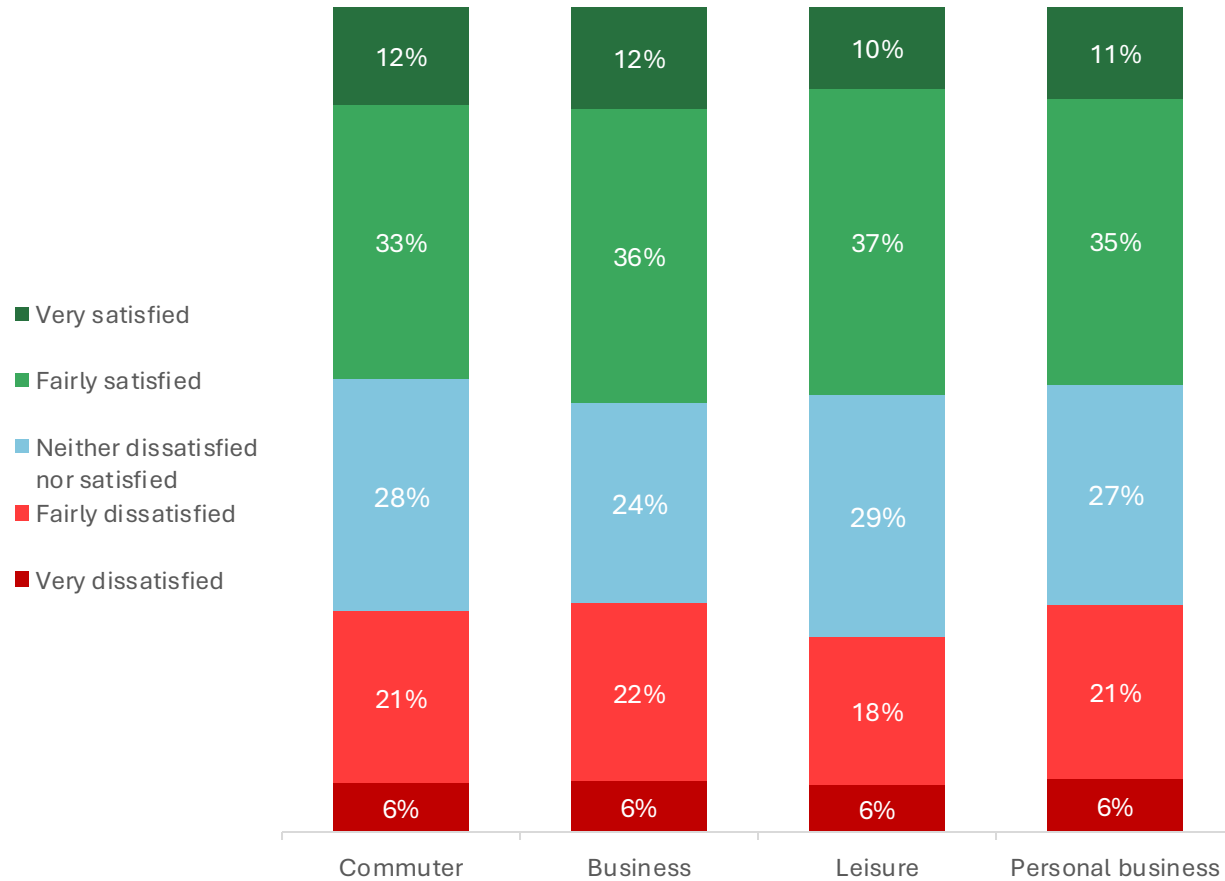
Passengers will put up with delays, but if it happens a lot, dissatisfaction builds.

Although, interestingly, those who experience delays **very frequently** are **also more likely to be very satisfied (22%) with how their most recent delay was handled** – perhaps reflecting a familiarity (for some) with how to cope in these circumstances (e.g. alternative routes, communications channels).

QCB1. Thinking about your train travel in the last 12 months, how often, if at all, have you experienced delays and cancellations that were not pre-planned? Think about problems caused on the day of travel by, for example, track, signalling and overhead electric wire faults, shortages of train crew, trespassers on the railway, broken down trains etc. Please ignore planned timetable changes so engineering work can take place. Base: All current passengers (n=12,764)

Q:CB2. Overall, thinking about the most recent delay or cancellation you experienced on the railway, how satisfied are you with the way in which it was handled? Base: All who have experienced disruption (n=10,858), those experiencing disruption: very frequently (n=702), frequently (n=2,160), occasionally (n=4,713) and rarely (n=3,283)

SATISFACTION WITH DELAY RESOLUTION IS CONSISTENT ACROSS JOURNEY TYPES



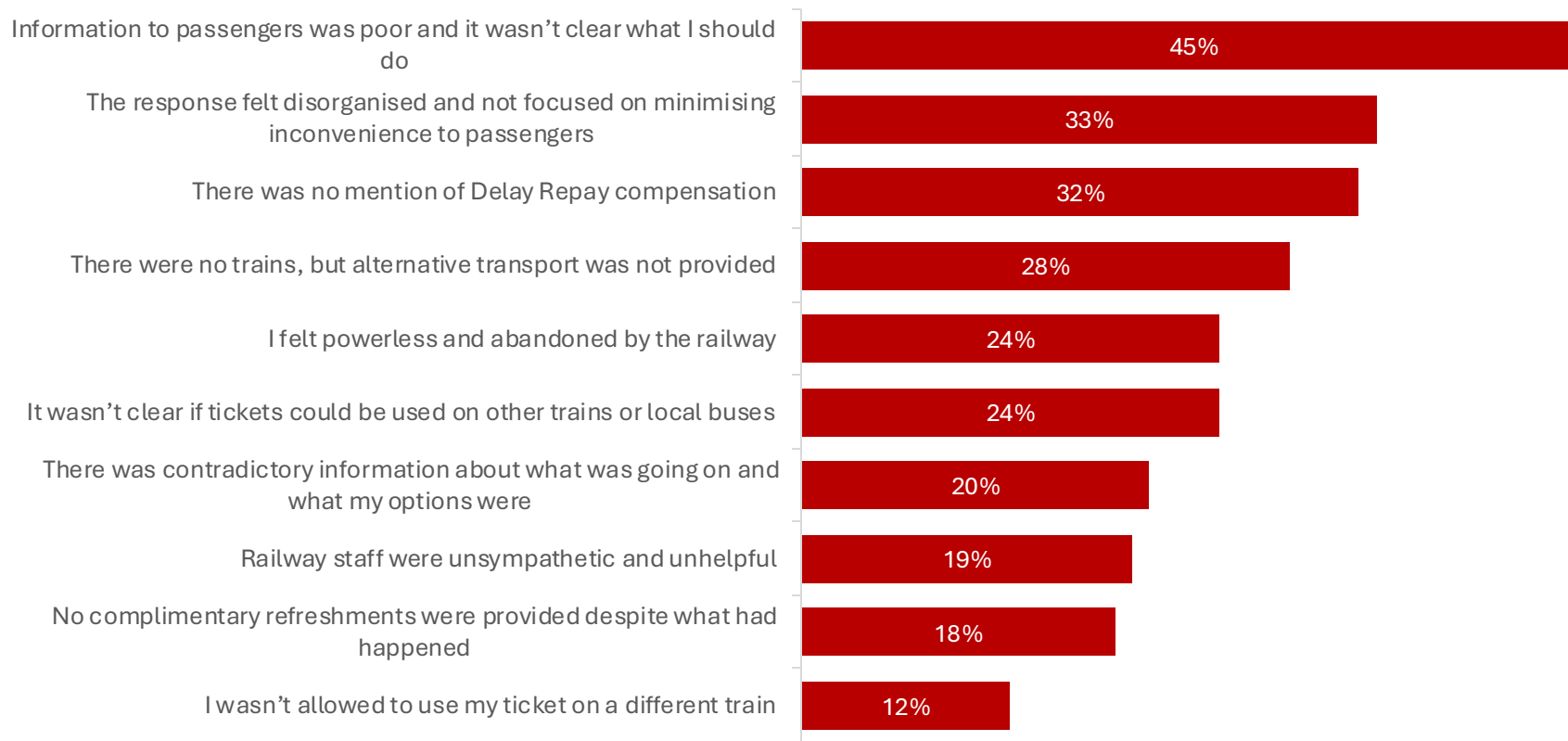
Lowest overall level of *dissatisfaction* is among Leisure travellers

Overall, around 1 in 4 are Dissatisfied/Very Dissatisfied with how delays are handled



THOSE WHO ARE DISSATISFIED COMPLAIN MOST ABOUT THE LACK OF CLEAR INFORMATION ON THEIR OPTIONS

Reasons for dissatisfaction



Providing better information to passengers is the key issue for improving satisfaction with delay resolution. This is most often observed by females (48%), AB socio-economic group (48%) and those aged over 55 (51%).

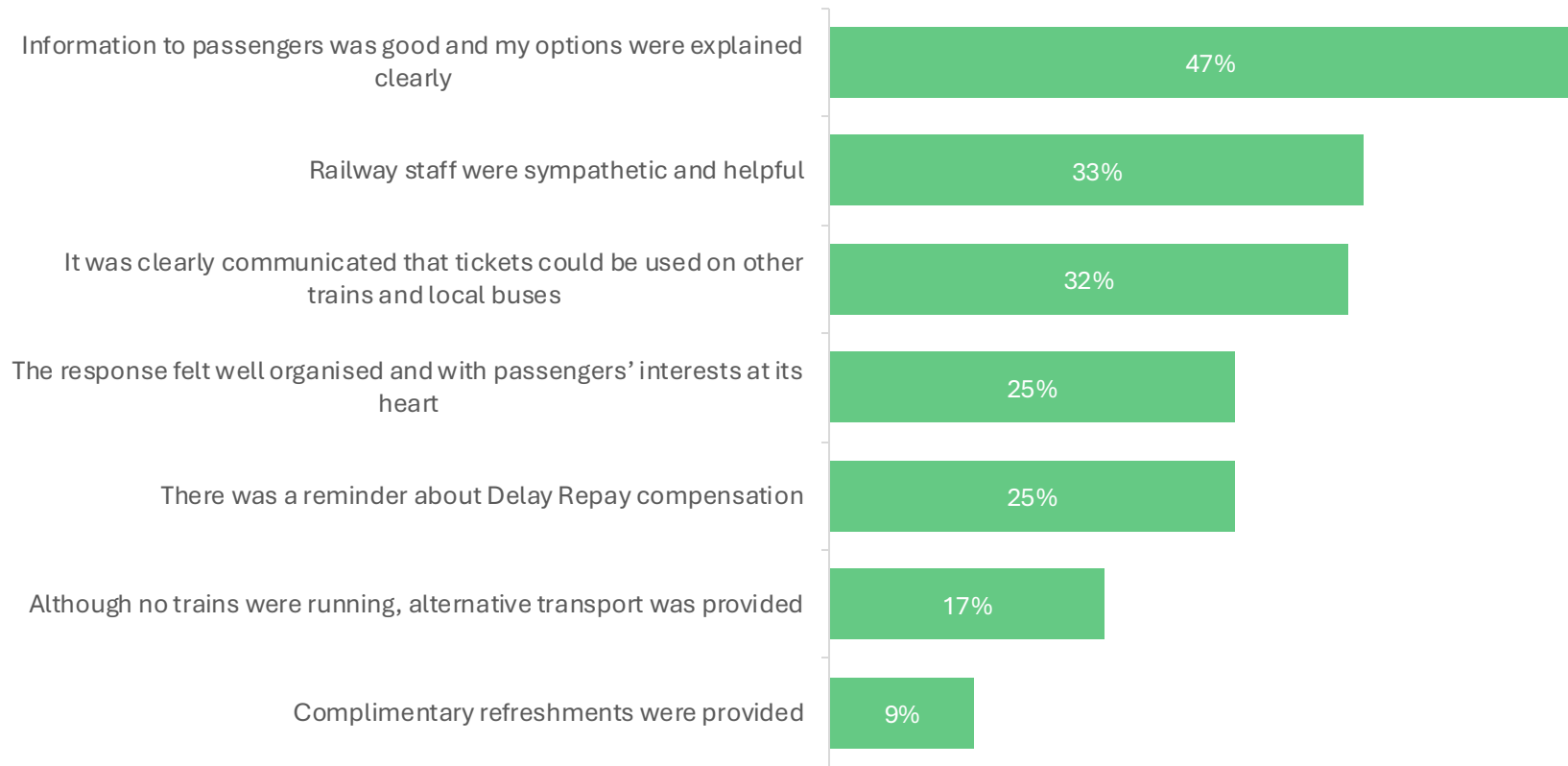
Many (33%) also feel that **resolution is not focussed on minimising passenger inconvenience** – especially those aged over 65 (38%), those with a social & behavioural disability (46%) and a mobility disability (39%).

Feeling powerless and abandoned is clearly a very strong feeling which is more likely to be felt by people aged over 55 (30%), those travelling in Wales (35%) and Scotland (31%), and those with stamina and breathing issues (34%).

QCB3. Why do you say you were DISSATISFIED with the way IN which the delay or cancellation was handled?
 Base: All dissatisfied with how the disruption was handled (n=2,736)

SATISFIED PASSENGERS ARE MOST POSITIVE ABOUT THE CLARITY OF INFORMATION PROVIDED DURING DISRUPTION

Reasons for satisfaction



Giving passengers information is - as well as being key to driving dissatisfaction – closely associated with passenger satisfaction when handling delays.

Sympathetic/Helpful staff really help to resolve dissatisfaction (33%) as does clear communication of how to use tickets on other services. Male passengers (36%), AB socio-economic group (36%) and those with a disability (37%) and those travelling with a mobility scooter (43%) or dog (45%) are most likely to highlight this.

Whilst free refreshments are sometimes helpful, they are not nearly as impactful as good information

QCB3. Why do you say you were SATISFIED with the way IN which the delay or cancellation was handled?
 Base: All satisfied with how the disruption was handled (n=5,053)

THE RAILWAY & THE ENVIRONMENT



THE RAILWAY & THE ENVIRONMENT - HEADLINES

01

The most impactful environmental goals are those which have the most immediate impact on passengers – i.e. simple and safe interchanges to active travel and buses



42%

of current passengers think simple and safe interchanges with buses and active travel are *very important*

02

There are groups in society who are more motivated by these issues – understanding these could help to drive up use of the railway (e.g. young people, those in cities, ethnic minorities, those with specific disabilities and accessibility needs).

03

Meeting these goals is likely to have greater impact on increased rail use among existing passengers vs. converting non-users – but, again, targeting more motivated groups could be effective.

The results broadly reflect the headlines from 2022:

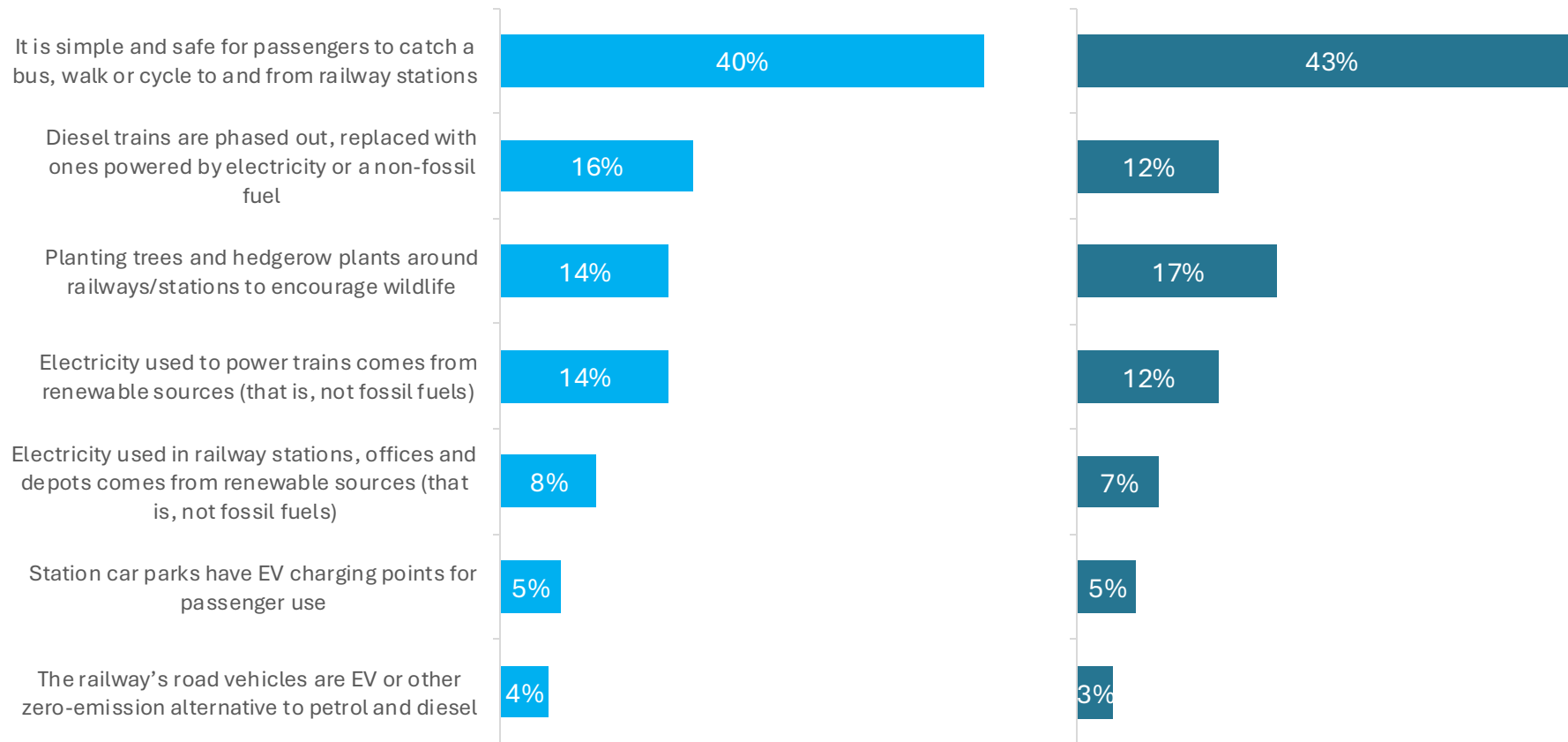
- ✓ Factors with direct / immediate impact on the passenger are most important
- ✓ Younger people are more concerned and motivated by these issues
- ✓ Leisure passengers are less motivated than other passenger types

IT BEING SIMPLE AND SAFE TO MOVE TO AND FROM RAILWAY STATIONS BY BUS, BICYCLE OR WALKING IS MOST IMPORTANT FOR TWO-IN-FIVE

MOST IMPORTANT

- Current passengers

- Non-rail users



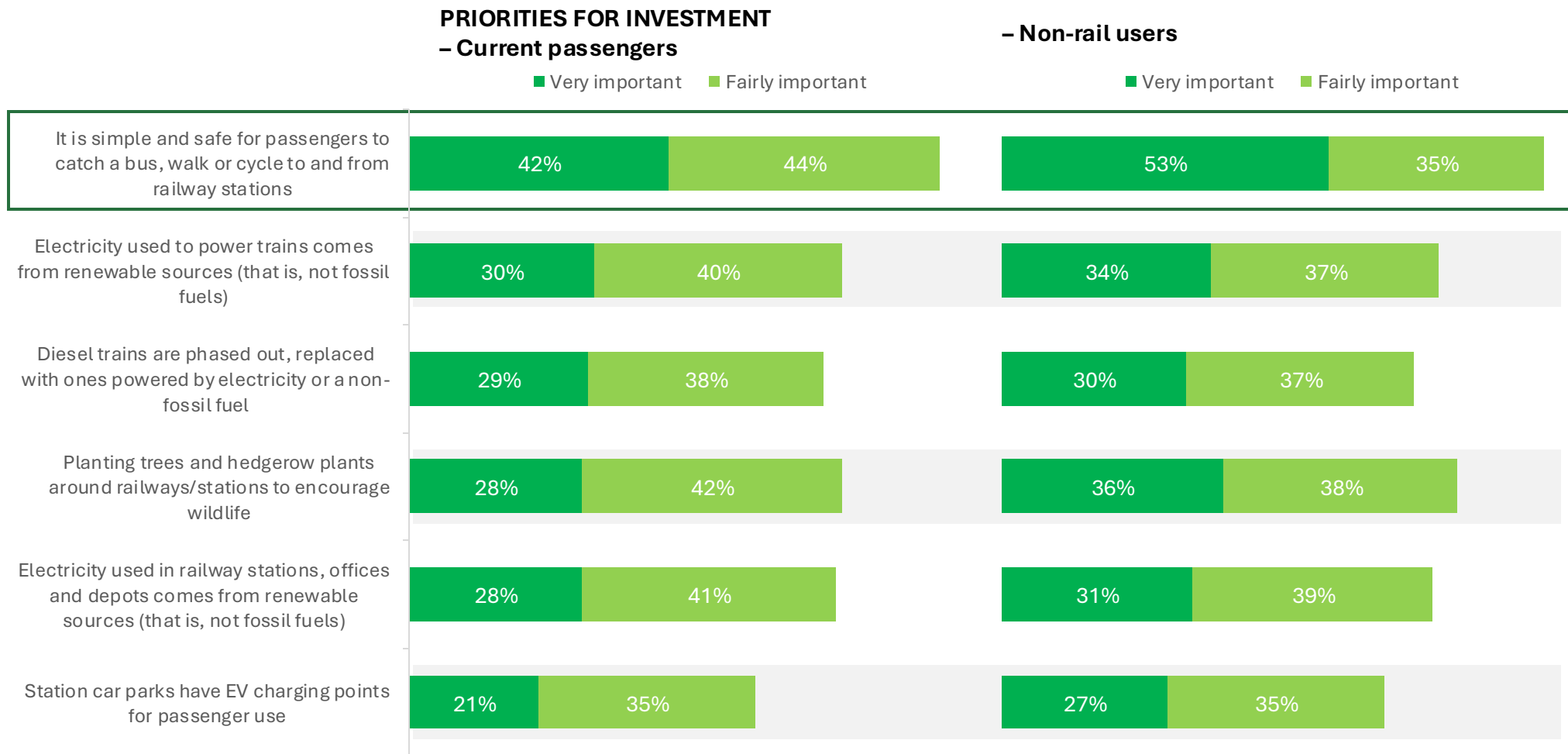
Passengers' biggest concern by far when thinking about the railway and environment, is it being easy and safe to catch a bus, walk or cycle to and from train stations.

Renewables and EV adoption is far down the list compared to safety and convenience during journeys.

QCC2. You mentioned that the following are important to you. Which would you say is most important to you?
 Base: All current passengers (n=12,764), All non-rail users (n=2,405)

SIMPLE AND SAFE BUS, BIKE AND WALKING OPTIONS TO AND FROM STATIONS ARE MOST IMPORTANT

This is a reflection that it is less about the railway being “green” and more to do this a desire for smooth and safe travel



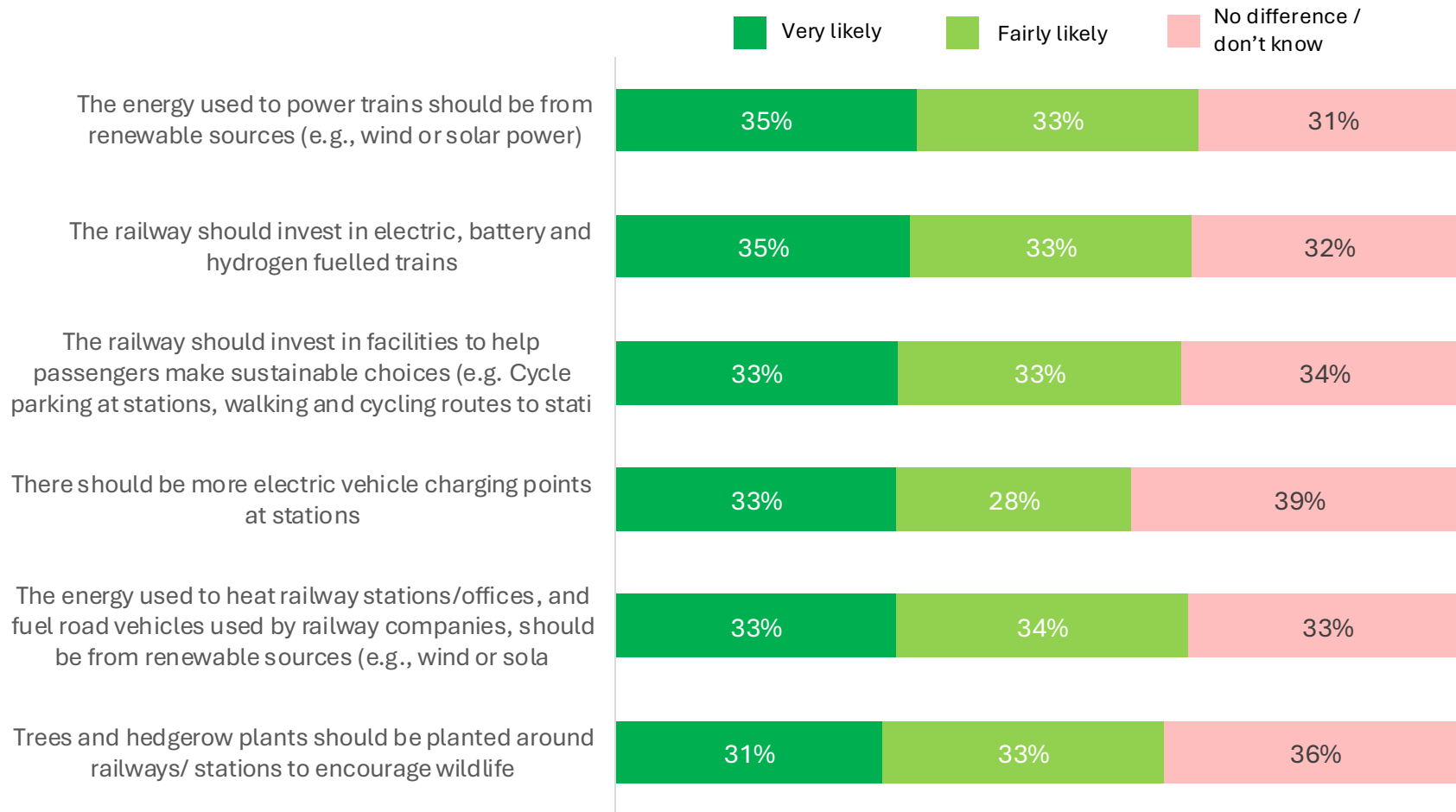
Younger passengers (aged under 35) are more likely than older people (aged 45+) to state that these issues are important to them (aside from the simple and safe transference to another transport mode and planting of trees and hedgerows which are equally important).

Overall, those in the higher Socio-Economic Groups (ABs) and **Black/ African/ Caribbean and Black British passengers** also view these issues as more important than average.

QCC1. How important, if at all, do you think it is for the railway to achieve the following?
 Base: All current passengers (n=12,764), All non-rail users (n=2,502)

ENVIRONMENTAL IMPROVEMENTS COULD STIMULATE GREATER RAIL USE AMONG CURRENT PASSENGERS

Likelihood to travel more by train – CURRENT PASSENGERS RATING EACH AS ‘IMPORTANT’



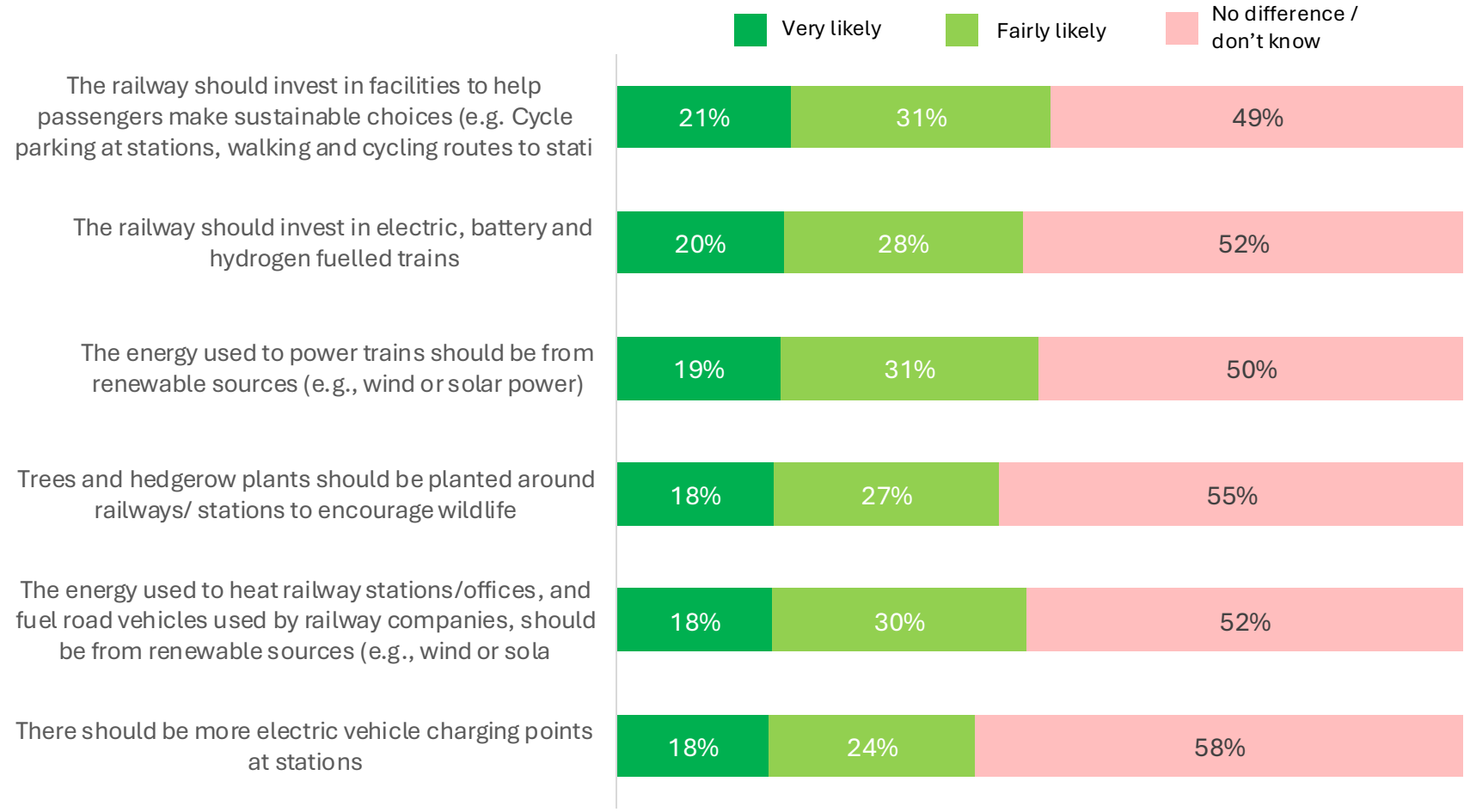
The results suggest that certain groups of passengers are **more motivated by these environmental issues**. Those who are more likely to state that they would be “very likely” to travel more by train if these things could be achieved include:

- **Younger people** (under 35 yrs)
- **AB** social economic group
- Those with **accessibility needs** (e.g. travelling with a bike, mobility scooter or pushchair)
- People living in a **city or large town**
- **Ethnic minorities**, especially those of Black ethnic origin
- And often those **with learning & memory or social & behavioural disabilities**



ENVIRONMENTAL IMPROVEMENTS ARE LESS MOTIVATIONAL FOR NON-USERS OF RAIL

Likelihood to travel more by train – NON-RAIL USERS RATING EACH AS ‘IMPORTANT’



As with current passengers, certain groups find these issues more motivating, with those more likely to say they are “very likely” to travel more by train including:

- **Young people** and **students**
- Those with **learning & memory** disabilities
- **Ethnic minorities**
- Those living in **cities and large towns**



ACCESSIBILITY FOR ALL RAIL PASSENGERS



ACCESSIBILITY FOR ALL RAIL PASSENGERS - HEADLINES

01

Clarity of announcements and working accessible toilets are top accessibility priorities for those with disabilities and accessibility challenges



64%

of current passengers think that clear and accurate audible announcements are *very important*

02

Passengers with disabilities tend to rate the performance of the railway on accessibility issues below average – but those with specific accessibility needs (e.g. users of lifts and mobility / wheelchairs) are often *more positive*

03

Improvements in these areas should increase the use of the railway – especially among current passengers, but also specific groups e.g. those using a pushchair or mobility scooter / wheelchair



37%

of current passengers would be *very likely* to travel more often if improvements to areas of accessibility are made

2022 comparison

As in 2022:

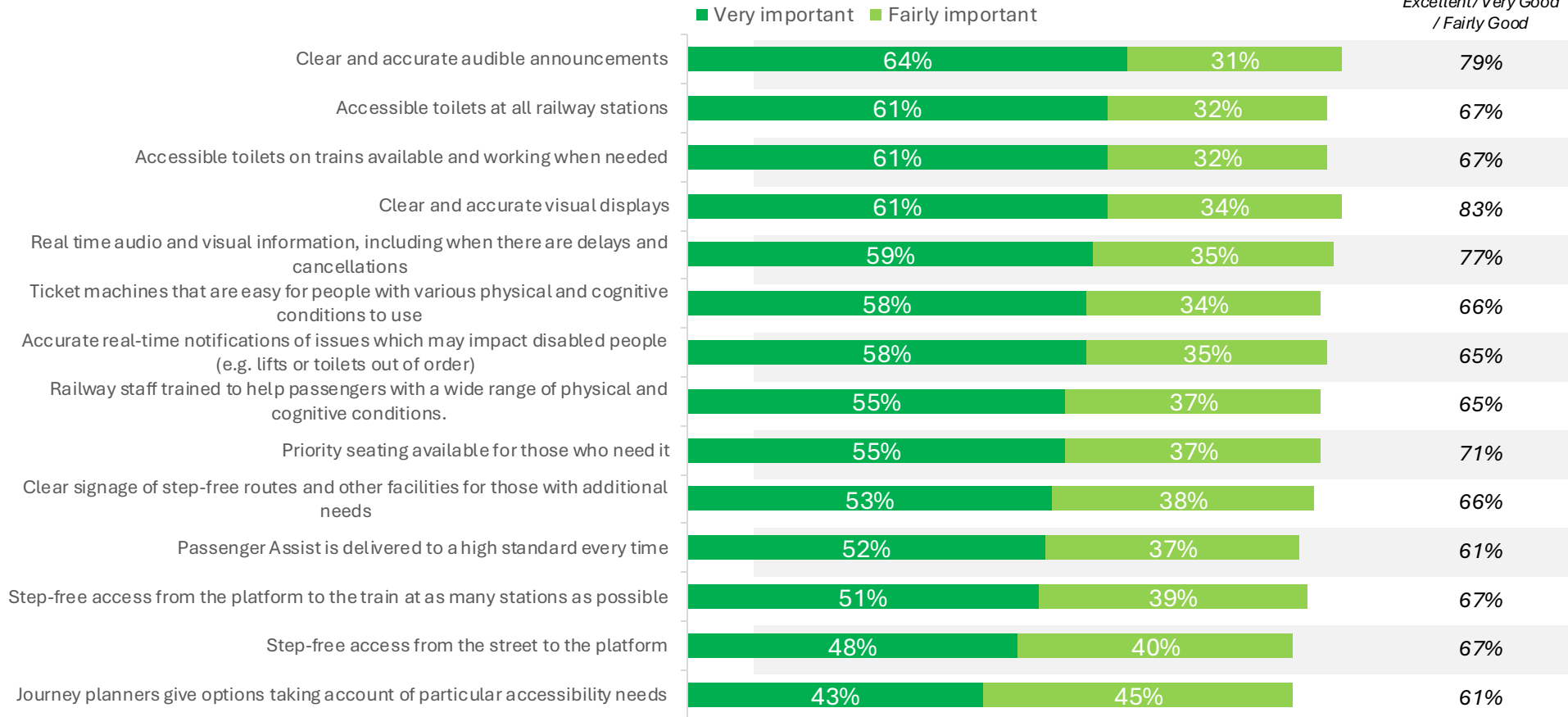
- ✓ Disabled passengers and those with accessibility needs have different priorities to the population as a whole
- ✓ Clarity of announcements, easy to use ticket machines and accessible toilets are all high priorities
- ✓ Improvements in these areas should drive greater use of railways

THE CLARITY AND ACCURACY OF AUDIO AND VISUAL ANNOUNCEMENTS ARE OF GREATEST IMPORTANCE ALONGSIDE ACCESSIBLE TOILET PROVISION

Accessibility priorities – CURRENT PASSENGERS

Rating of railway performance

Excellent/Very Good / Fairly Good



Among the general population, those who are more likely to rate these goals as very important include:

- **Females**
- **Older passengers**
- **First Class travellers**
- **And those with a disability...**

QCD1. How important, if at all, do you think it is for the railway to achieve the following?
 QCD2. Now, thinking about the train journeys you make, please tell us how you feel the railway is currently doing on the following?
 Base: All current passengers (n=12,764)

PASSENGERS WITH MOBILITY, STAMINA AND BREATHING ISSUES ARE IN PARTICULAR NEED OF SUPPORT

% Very important	Disability								Accessibility challenges			
	All	Any	Sensory	Mobility	Mental health	Learning & Memory	Stamina & Breathing	Social & Behavioural	Use a lift at station	Step-free	Mobility scooter/wheelchair	Pushchair / buggy/ pram
Clear and accurate audible announcements	64%	68%	67%	71%	69%	69%	72%	68%	68%	68%	63%	65%
Accessible toilets at all railway stations	61%	67%	66%	73%	68%	69%	70%	68%	66%	69%	67%	66%
Accessible toilets on trains available and working when needed	61%	67%	66%	74%	67%	68%	70%	68%	66%	70%	67%	65%
Clear and accurate visual displays	61%	65%	65%	68%	65%	63%	68%	70%	64%	65%	61%	62%
Real time audio and visual information, including when there are delays and cancellations	59%	62%	59%	66%	64%	65%	65%	67%	63%	62%	61%	60%
Ticket machines that are easy for people with various physical and cognitive conditions to use	58%	63%	60%	69%	65%	64%	66%	66%	62%	65%	60%	61%
Accurate real-time notifications of issues which may impact disabled people (e.g. lifts or toilets out of order)	58%	64%	62%	70%	65%	68%	69%	69%	63%	69%	65%	62%
Railway staff trained to help passengers with a wide range of physical and cognitive conditions.	55%	61%	59%	69%	62%	66%	66%	68%	61%	65%	67%	58%
Priority seating available for those who need it	55%	61%	57%	69%	62%	62%	67%	65%	61%	66%	67%	61%
Clear signage of step-free routes and other facilities for those with additional needs	53%	60%	56%	67%	61%	61%	65%	65%	60%	65%	64%	61%
Passenger Assist is delivered to a high standard every time	52%	58%	55%	66%	58%	60%	65%	63%	58%	61%	65%	55%
Step-free access from the platform to the train at as many stations as possible	51%	58%	57%	66%	58%	61%	65%	62%	59%	65%	63%	60%
Step-free access from the street to the platform	48%	55%	51%	62%	55%	56%	59%	60%	54%	63%	62%	56%
Journey planners give options taking account of particular accessibility needs	43%	48%	46%	53%	49%	54%	53%	56%	49%	52%	54%	47%

The results emphasise the importance of focussing on the needs of those with **mobility issues** (including dexterity) and those who are challenged by **stamina, beathing or fatigue** - as they are most likely to rate many of these goals as very important.

Passengers with **social or behavioural issues** (e.g. associated with autism, Asperger’s syndrome or ADHD) will often rate these accessibility issues very highly – especially those related to communications and information.

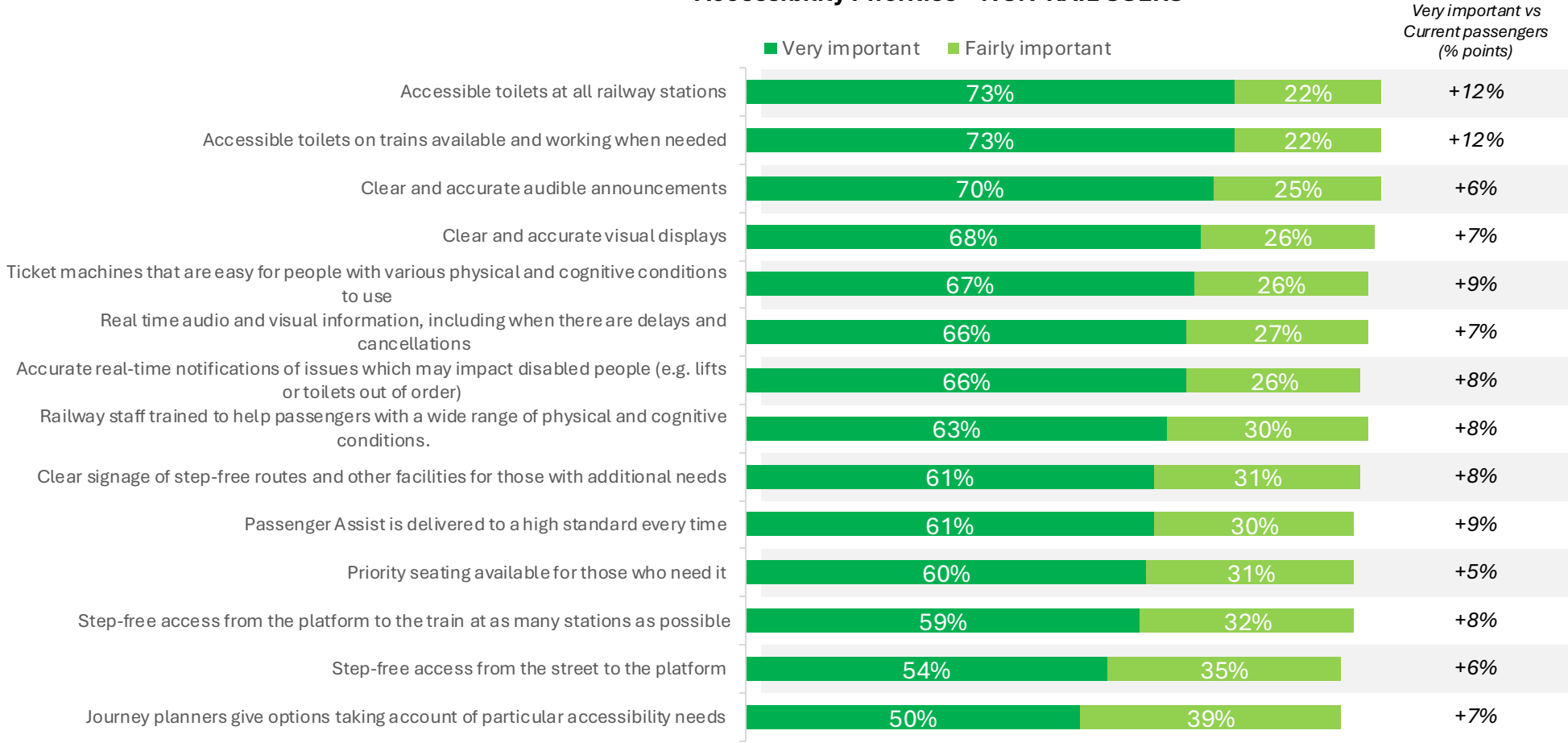
Base: 12764 4272 860 1583 1807 449 830 616 4500 1416 283 510

QCD1. How important, if at all, do you think it is for the railway to achieve the following?
Base: All current passengers (n=12,764)

NON-USERS OF RAIL RATE THE IMPORTANCE OF ACCESSIBILITY GOALS MORE HIGHLY THAN CURRENT PASSENGERS

This illustrates the importance in delivering against these areas to help attract people to the railway

Accessibility Priorities – NON-RAIL USERS



As with current passengers, among non-users, **females, older people and those with a disability** are generally more likely to rate these goals as *very important*.

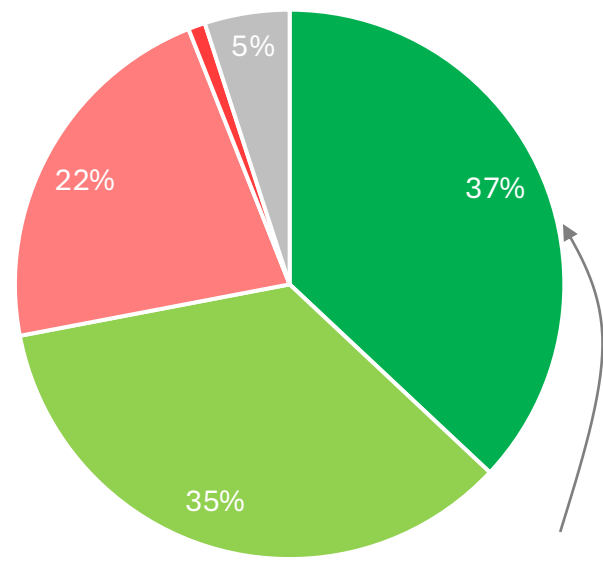
QCD1. How important, if at all, do you think it is for the railway to achieve the following?
 QCD2. Now, thinking about the train journeys you make, please tell us how you feel the railway is currently doing on the following?
 Base: All non-rail users (n=2,502)

IMPROVEMENTS TO ACCESSIBILITY GOALS MORE LIKELY TO DRIVE GREATER USE AMONG CURRENT PASSENGERS, THAN ATTRACTING NEW USERS

However, a sizeable minority of non-users do suggest that improvements in these areas could attract them back to the railway

WHETHER MORE LIKELY TO TRAVEL BY TRAIN IF ACCESSIBILITY IMPROVED

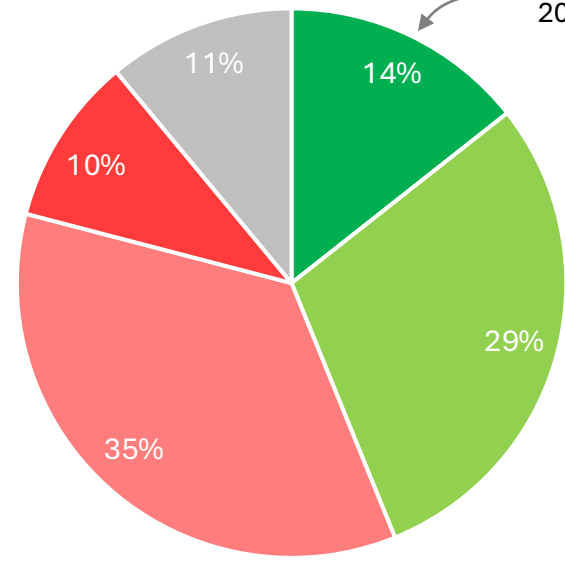
Current passengers with a disability and/or accessibility issues



- Yes – I would be very likely to travel more often by train
- Yes – I would be fairly likely to travel more often by train
- No – my journeys would be easier, but I would be unlikely to travel more often
- No – it would still be impossible for me to travel by train
- Prefer not to answer / Don't know

60% Mobility scooter / wheelchair
45% under 35s
47% pushchair / buggy
43% AB socio economic group
43% learning and memory disability

Non-rail users with a disability



22% under 35s
20% AB socio economic group

Those most likely to find improvements motivating are **younger and higher socio-economic grade people (ABs)**.
Interestingly, with the odd exception (e.g. those using **wheelchairs or mobility scooters**) those with a disability or accessibility needs, are not more likely than average to say that they would be very likely to travel more by train in the future with accessibility improvements to stations and trains.

QCD3. Earlier in the survey you mentioned that you are affected by a physical or mental health condition or illness OR on some journeys you use lifts at stations, travel with a large item such as a buggy, suitcase or bicycle or have difficulty stepping onto or off trains]. Please tell us whether, if accessibility of stations and trains were improved, you would be likely to travel more often.
Base: All current passengers with a disability or access issues (n=7,193), All non-rail users with a disability (n=1,101)

PERSONAL SECURITY & SAFETY



PERSONAL SECURITY & SAFETY - HEADLINES

01

Safety and security is among the top priorities for rail passengers, and this is reflected in a high proportion who have related concerns when travelling by train and who would be motivated to use the railway more with enhanced safety and security measures.



42%

of current passengers *very likely* to travel more by train with enhanced safety and security

02

Enhancements to safety and security would be particularly impactful for females, younger travellers and those with a disability (e.g. learning & memory, and social & behavioural disabilities).



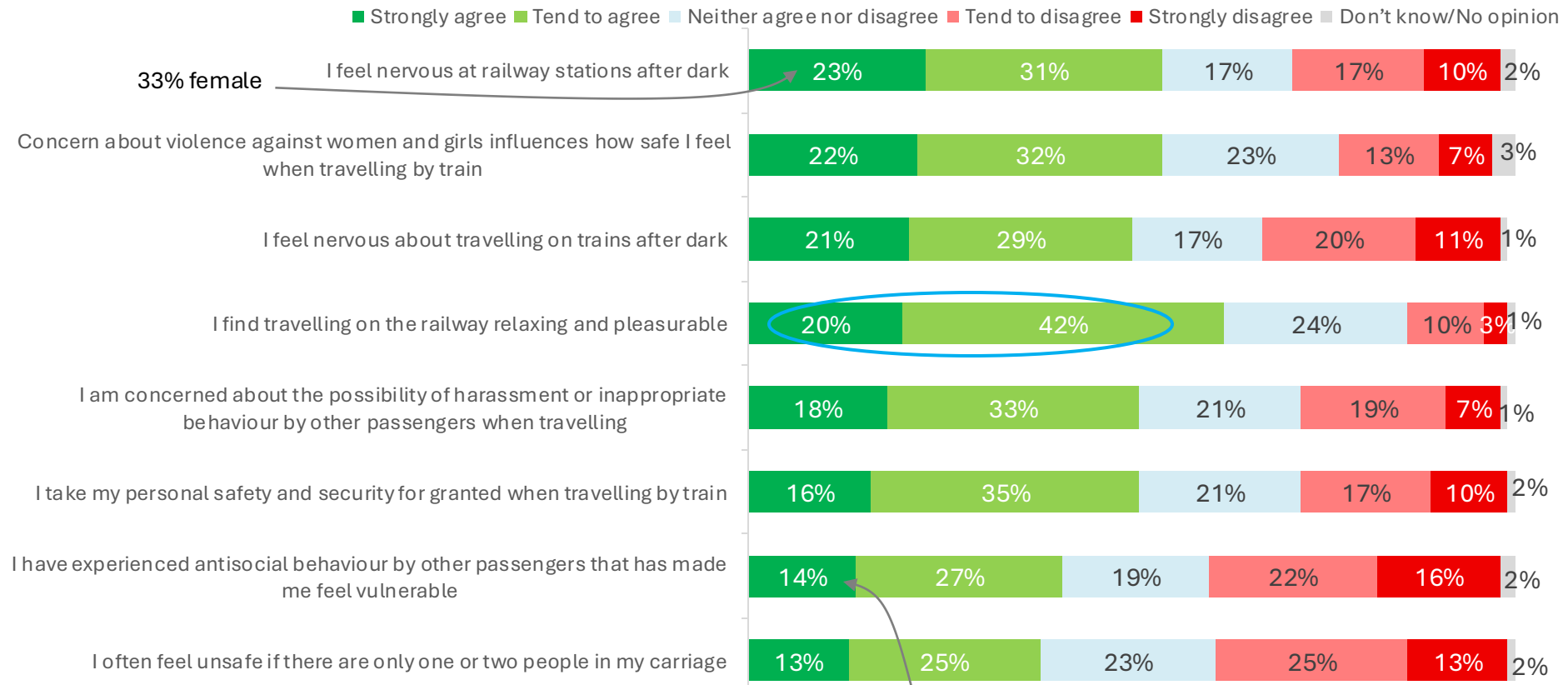
58%

of under 35s *very likely* to travel more by train with enhanced safety and security

However, almost two-thirds find travelling on the railway relaxing and pleasurable

PERSONAL SAFETY AND SECURITY ISSUES TEND TO BE A CONCERN FOR AROUND HALF OF PASSENGERS

Views on personal safety and security – CURRENT PASSENGERS



Those with the **most concerns** about their personal safety and security include: **females, young people** and **those with a disability**.

Men, people living in Scotland, users of airport services and those who **travel with a bike, dog or mobility scooter / wheelchair** are among those more likely than average to find travelling by rail **relaxing and pleasurable**

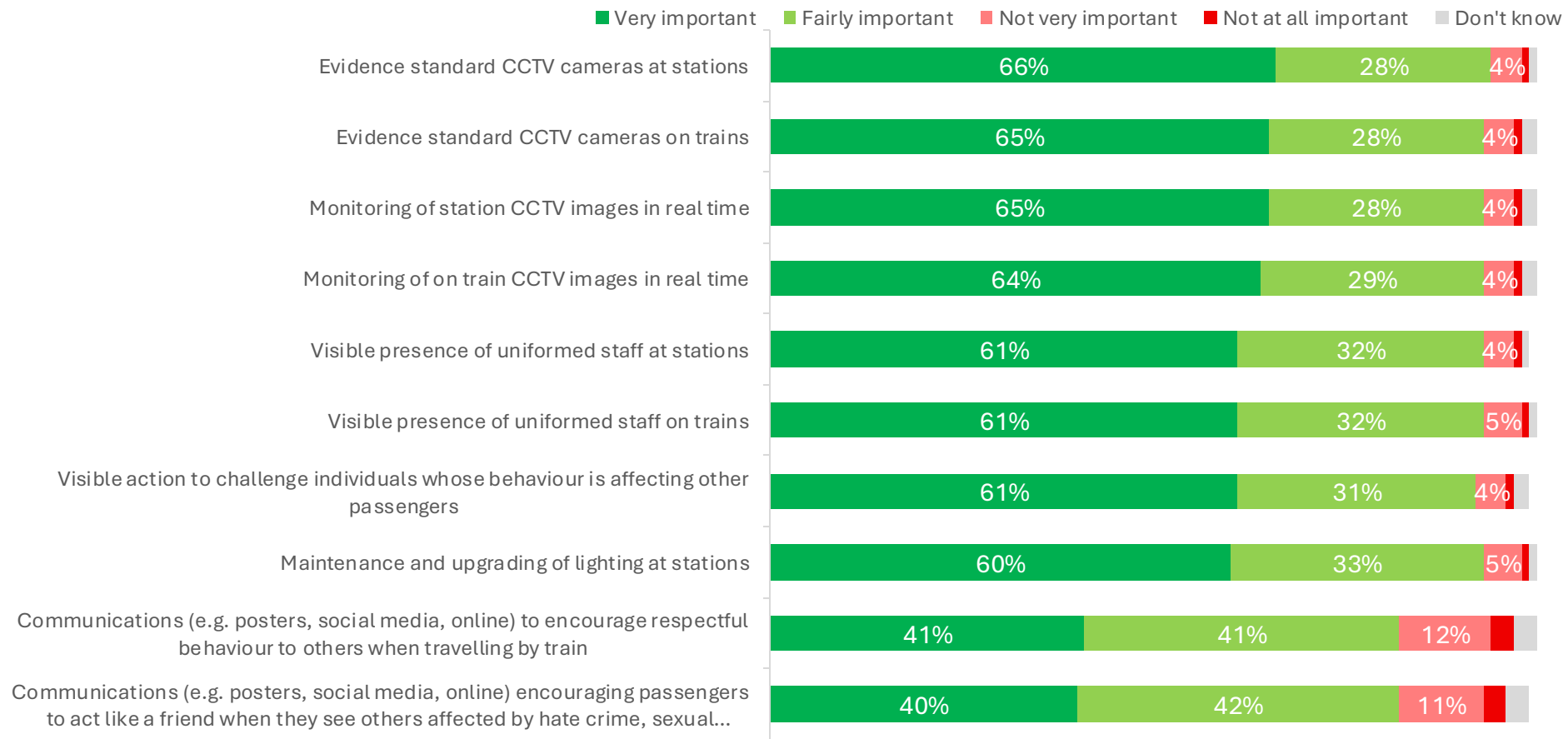
20% under 35 yrs
 27% learning & memory disabilities
 27% social & behavioural disabilities

QCE1. We are now interested in your opinions about personal safety and security when travelling by train. To what extent do you agree or disagree with the following statements. Base: All current passengers (n=12,764)

PASSENGERS ARE HIGHLY SUPPORTIVE OF SECURITY MEASURES AT STATIONS AND ON TRAINS

Passengers don't distinguish between security on trains or at stations – they are equally important

Importance of safety and security features – CURRENT PASSENGERS



There is **strong support for all types of security measures**, but some groups are even more likely than average to consider them to be very important, including:

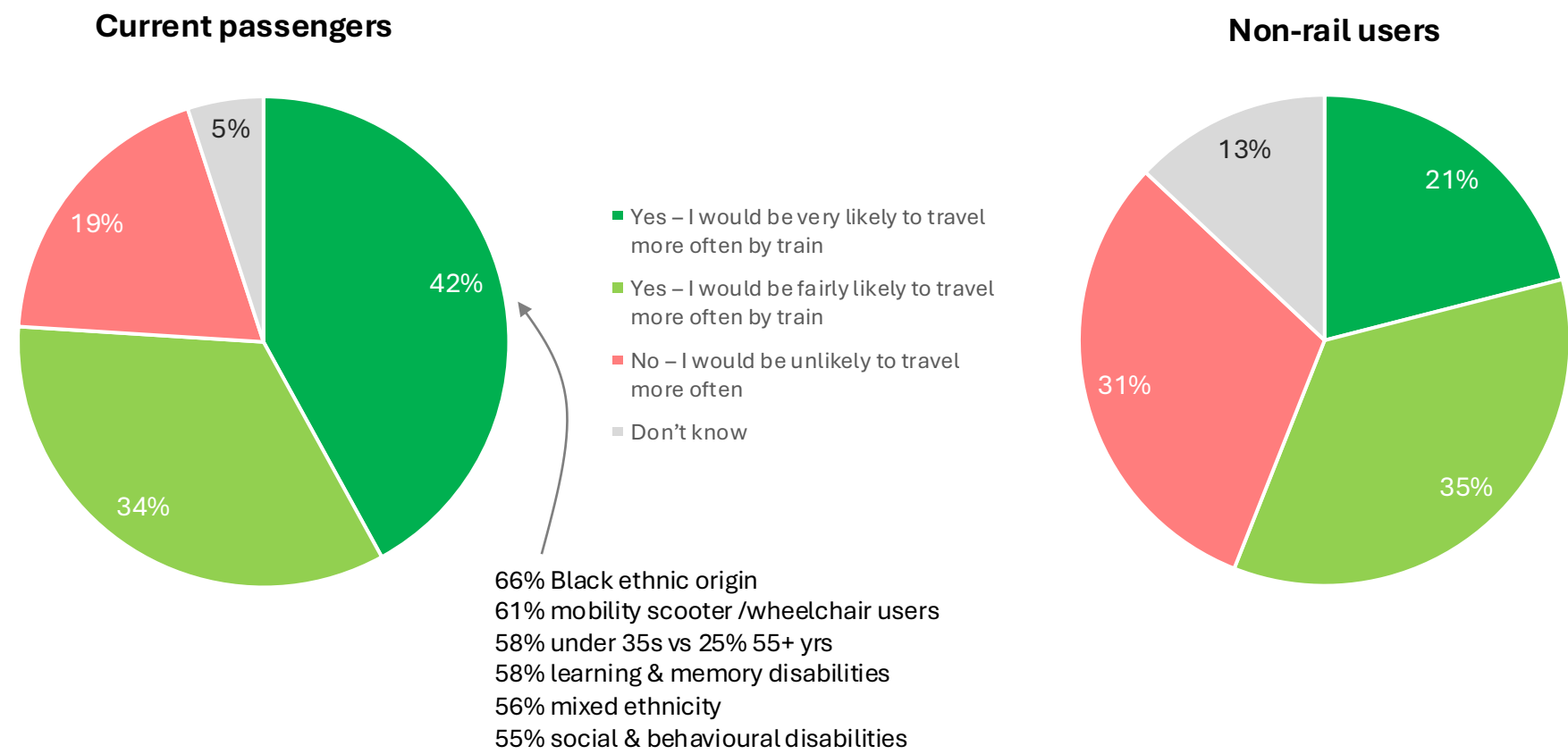
- **Females** (e.g. 70% think it is very important to monitor train CCTV in real time, vs 58% of males)
- Passengers with **all types of disability**
- Passengers who **use lifts and desire step-free access at stations**
- Passengers of **Black ethnic origin**

QCE2. How important do you think the following things are to improving people's feeling of safety and security on the railway?
 Base: All current passengers (n=12,764)

THREE-QUARTERS OF CURRENT USERS WOULD TRAVEL MORE WITH IMPROVED SAFETY AND SECURITY ON THE RAILWAY

Although less, more than half of non-users also say that they would use the railway more with safety and security improvements

WHETHER MORE LIKELY TO TRAVEL BY TRAIN IF PERSONAL SAFETY & SECURITY IMPROVED



Enhancements in this area would have broad benefits across passenger types, but as indicated on the chart, it would be more appealing for specific groups – many of whom are also more likely to be positively motivated by other types of change (e.g. environmental and accessibility).
The types of non-users who would be more likely to travel by train with safety and security enhancements are similar to the current passenger profile (e.g. young people, and those from ethnic minorities).

QCE3. Please tell us whether, if safety and security was improved on the railway, you would be likely to travel more often.
Base: All current passengers (n=12,764), All non-rail users (n=2,502)

REVISITING THE HEADLINES



HEADLINE FINDINGS (I)

01

Trains running on time and not being cancelled is the top priority for the railway (up from #2 in 2022).

Trains running sufficiently frequently is ranked #8 down from #3 in 2022.

02

For current passengers, Personal Security and Safety – both at stations and on trains – have become more important. As additional qualitative research has indicated, this appears to be associated with a general increase in public concern about crime and high profile incidents on the railway late 2025.

However, the railway's performance in this area is considered relatively good.

03

Two of the highest priority areas – trains running on time and not being cancelled, and the ticket price being value for money – are also among the lowest performing.

04

Lower cost of rail fares is the single biggest factor that could get non-users back onto the railway.

HEADLINE FINDINGS (II)

05

The environmental impact of the railway is doubly important to under 35s compared to over 55s, but is still far less important than the trains running on time and not being cancelled, personal security (on the train and at stations) and the ticket price being value for money.

06

While most passenger types – across location, demographics and journey type – have very similar priorities, the differences in the views of disabled passengers and those with accessibility issues, illustrates that we should not treat all passengers the same.

07

Some apparently lower priority areas could have an outsize impact on increasing train use.

Quick journey times and the railway minimising its impact on the environment are equal 5th in likelihood to increase train use (*very likely*) among those for whom it is a priority.

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