

22 February
2022

Rail User Weekly Survey

Presentation to Rail Statistics
Management Group

Murray Leader
Senior insight
advisor



Introduction



1. Genesis of Rail User Weekly Survey
2. Its key aspects
3. A look at the type of results available

Genesis (1)



1. Pandemic changed basis of face-to-face interviewing and we ceased our face-to-face trackers.
2. Important to take a read on views of Covid and travelling. Established Covid tracker. Tracked sentiment of safety and travel, modes being used, and attitudes to travel.
3. Very well received during a time of great need for evidence of what was happening on the ground.

Genesis (2)



1. In September 2021 more people returning to travel. Wanted to get a deeper read on experience of travel.
2. Though it is planned to re-introduce the direct experience survey later this year..... Lot of work and new approach methods.
3.this survey designed to provide core information in between; at least until end March 2022.

Key aspects of Rail User Weekly Survey



1. Asked twice weekly to online panel (Yonder Consulting) representative of population of Great Britain – 4000.
2. Full question set invoked when used train in last seven days (apart from London Underground).
3. Core questions are the train satisfactions ones from NRPS (overall sat + 16 measures) and includes many classification variables.
4. Produce results weekly, issue to key stakeholders in Government and industry.

Rail User Weekly Survey

A look at the type of results available

(based on report of 13 February)

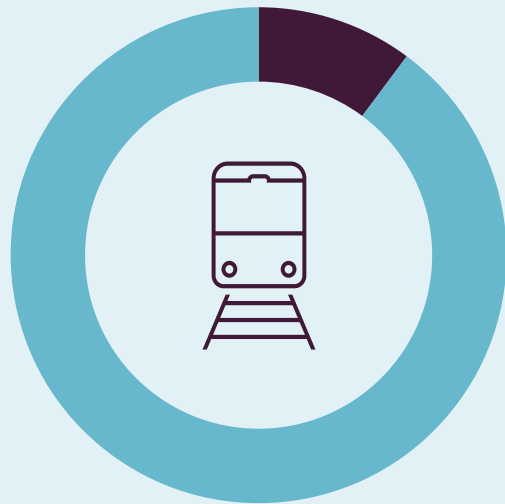


Weekly results



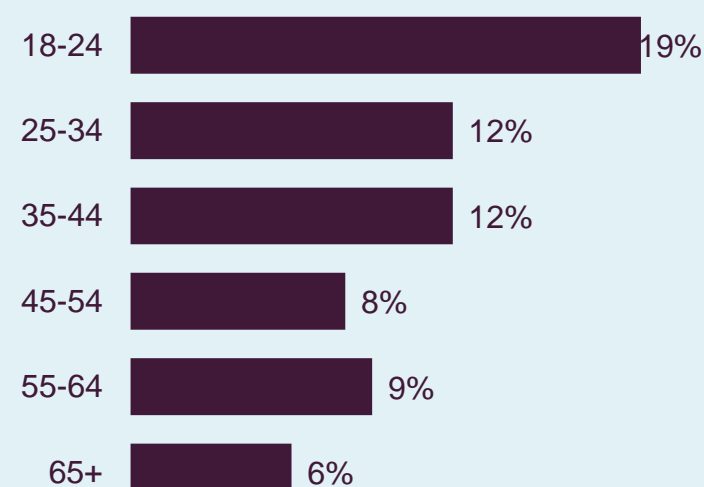
Around one in ten used rail in the last seven days

Proportion using rail in the last seven days



10%
of people in
Great Britain used
rail this week

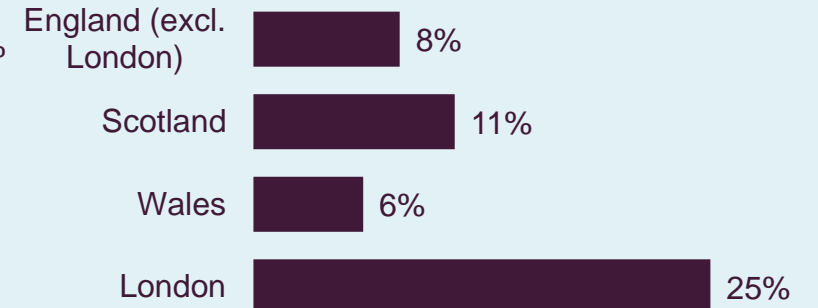
Age



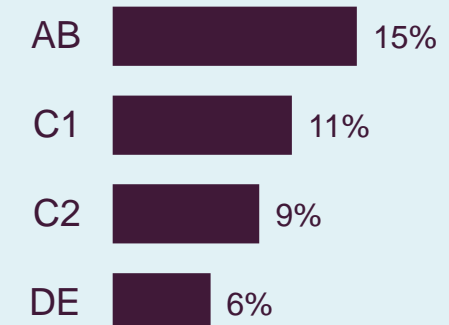
Sex



Region

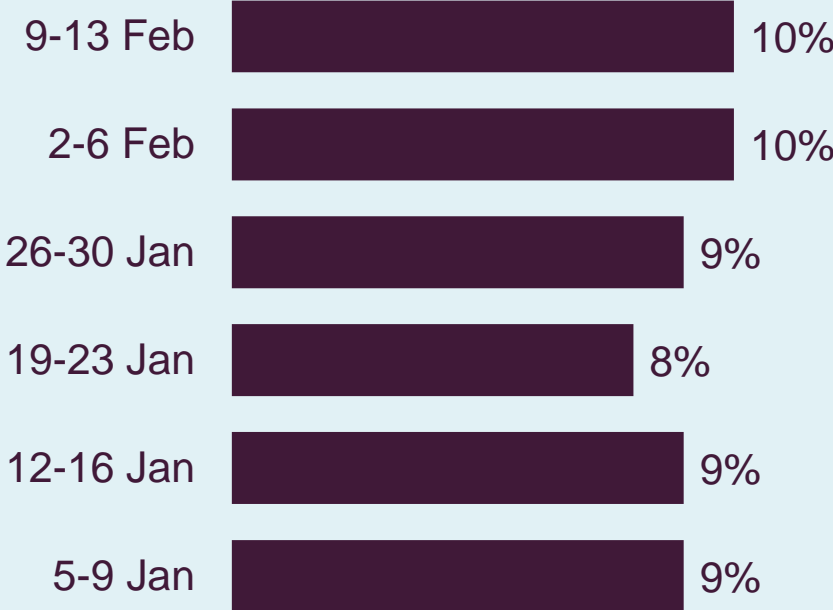


Social grade



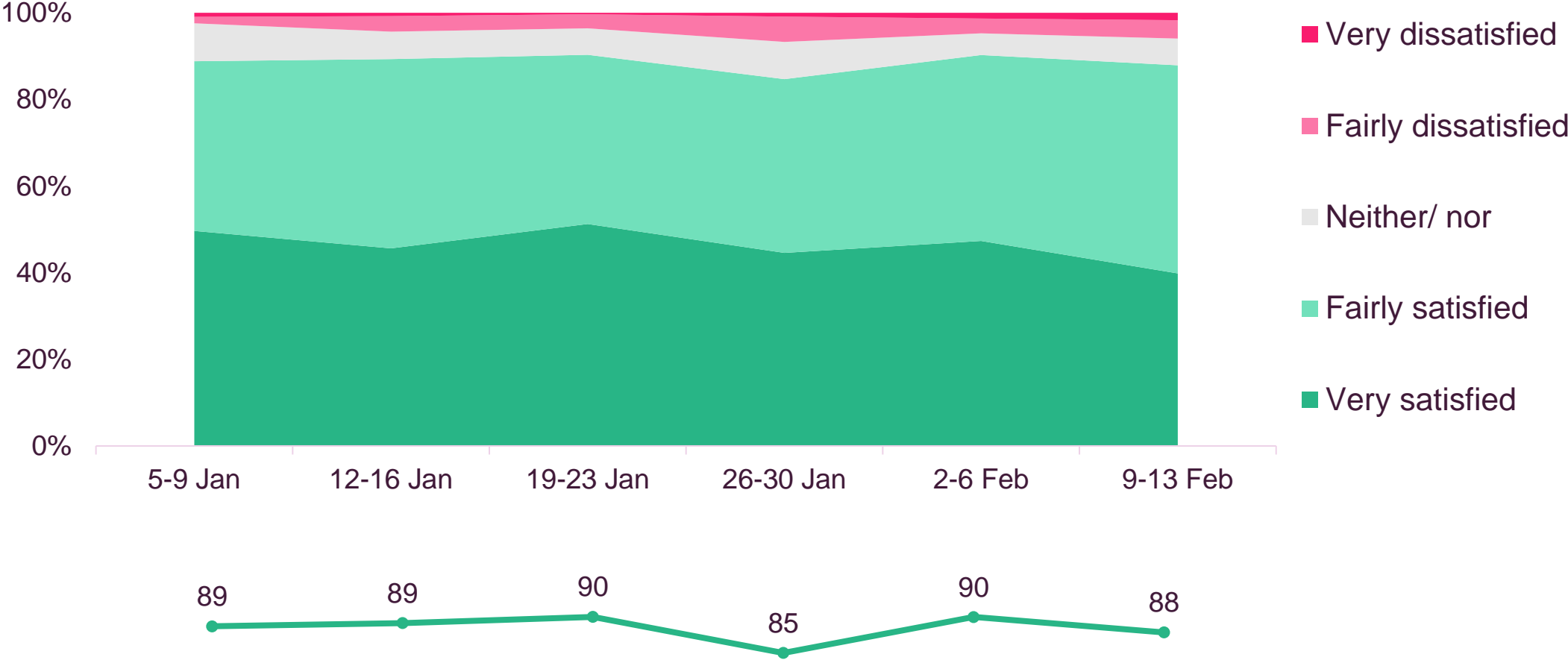
Rail use stable over the last six weeks

Proportion using rail within the last seven days



9 - 13 February 2022 report. Base size all respondents: approx. 4000 per week.

Overall satisfaction with rail journey – over time



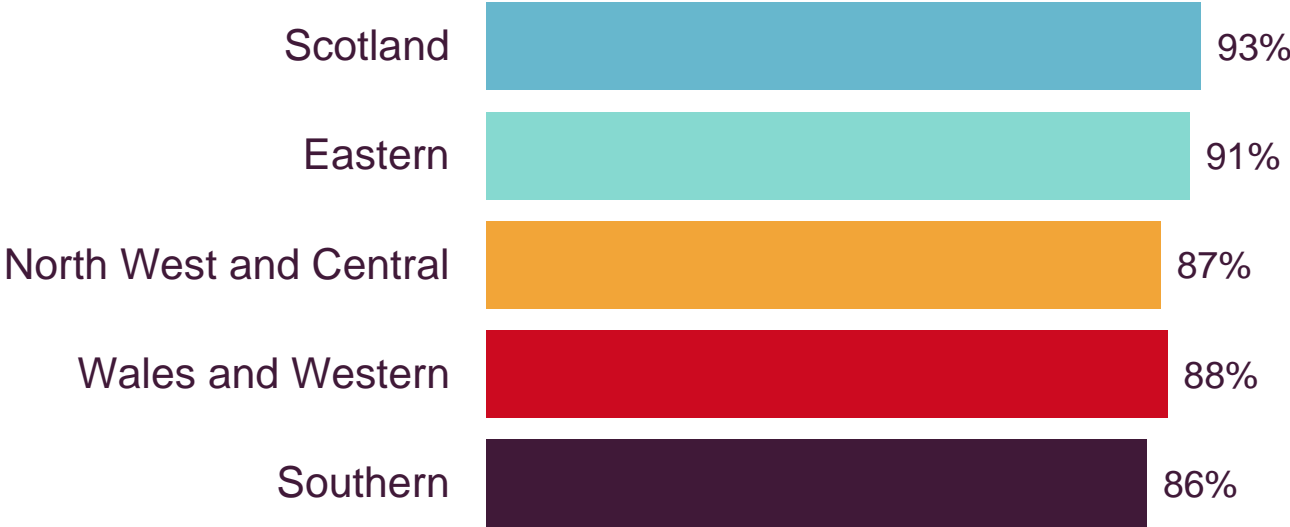
9 - 13 February 2022 report. Base size: all who used rail in last seven days – average 374 per week



Overall satisfaction by Network Rail region

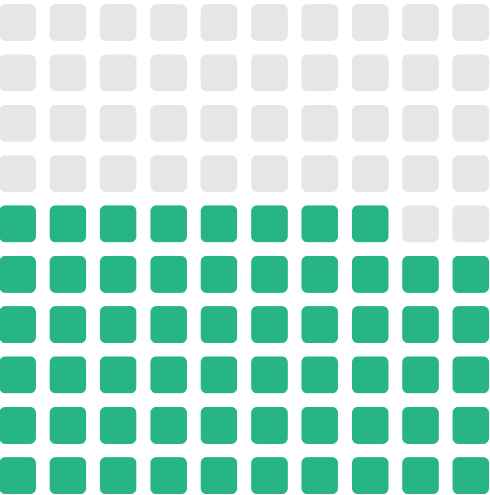


By region over last 4 weeks



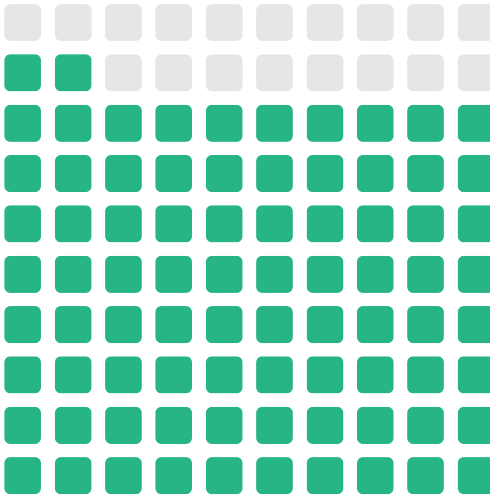
9 - 13 February 2022 report. Base size by region: Scotland to Southern: 108, 398; 305, 132, 517.

Satisfaction with information, cleanliness and Covid-related measures



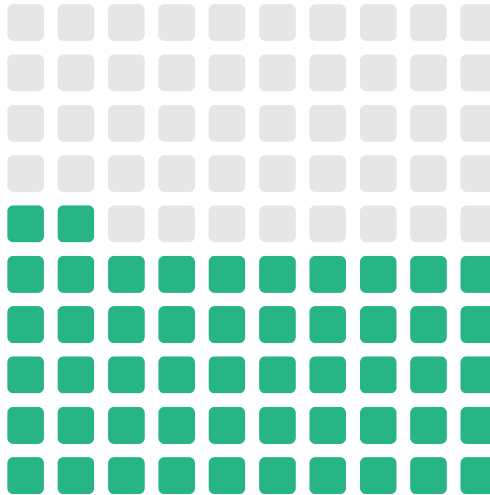
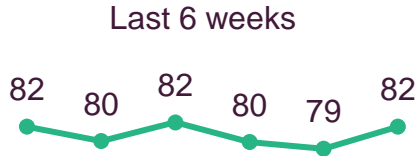
Information on how busy train would be before travelling

58%



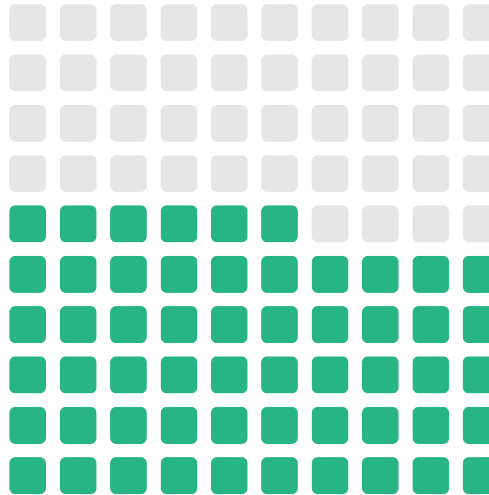
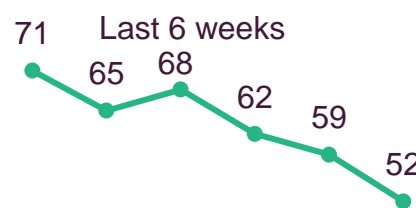
Cleanliness of the inside of the train

82%



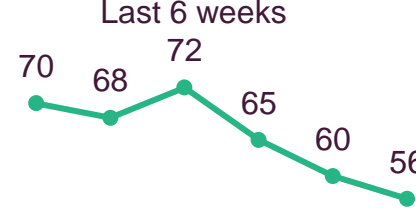
Number of people wearing face coverings

52%



Covid measures on train and at station

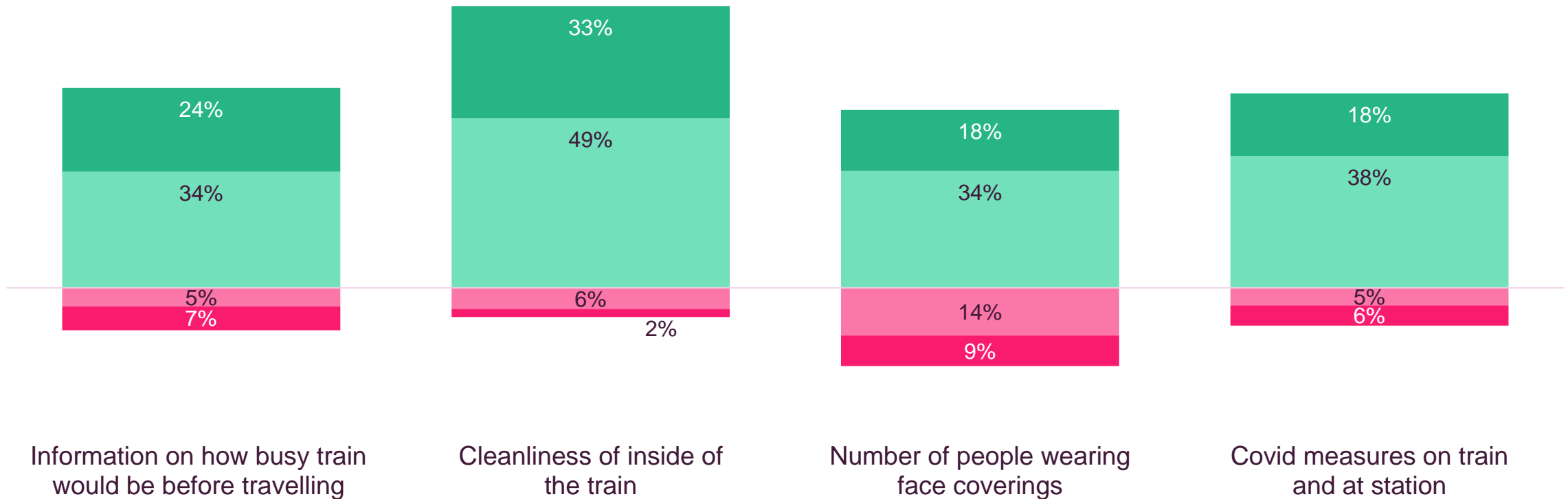
56%



9 - 13 February 2022 report. Base size (used rail in last seven days and not applicable excluded): 316; 410; 405; 406.

Satisfaction with information, cleanliness and Covid-related measures

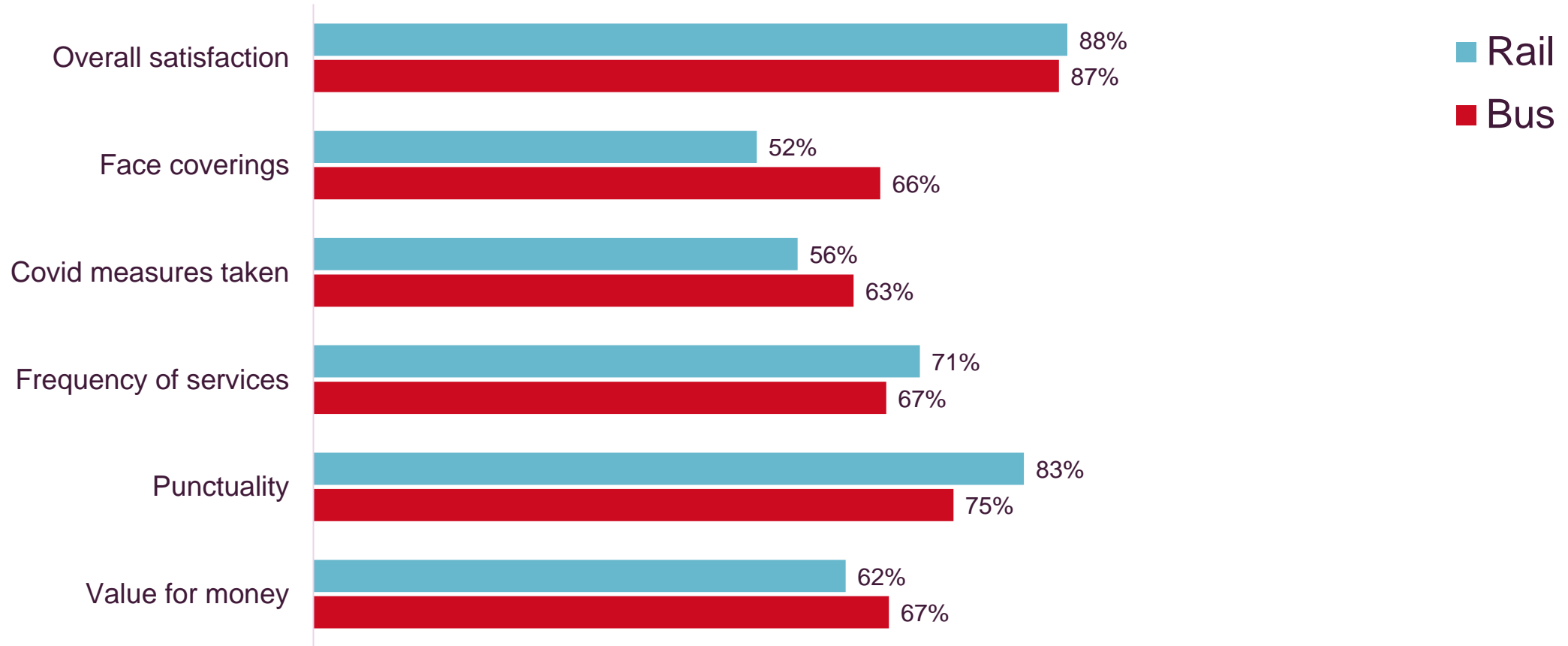
Very satisfied Fairly satisfied Fairly dissatisfied Very dissatisfied



9 - 13 February 2022 report. Base size (used rail in last seven days and not applicable excluded): 316; 410; 405; 406. Note: the values of 'neither satisfied nor dissatisfied' are omitted from the charts.

Rail to bus comparison – current week

Rail passenger satisfaction higher on punctuality but lower on Covid aspects and value for money



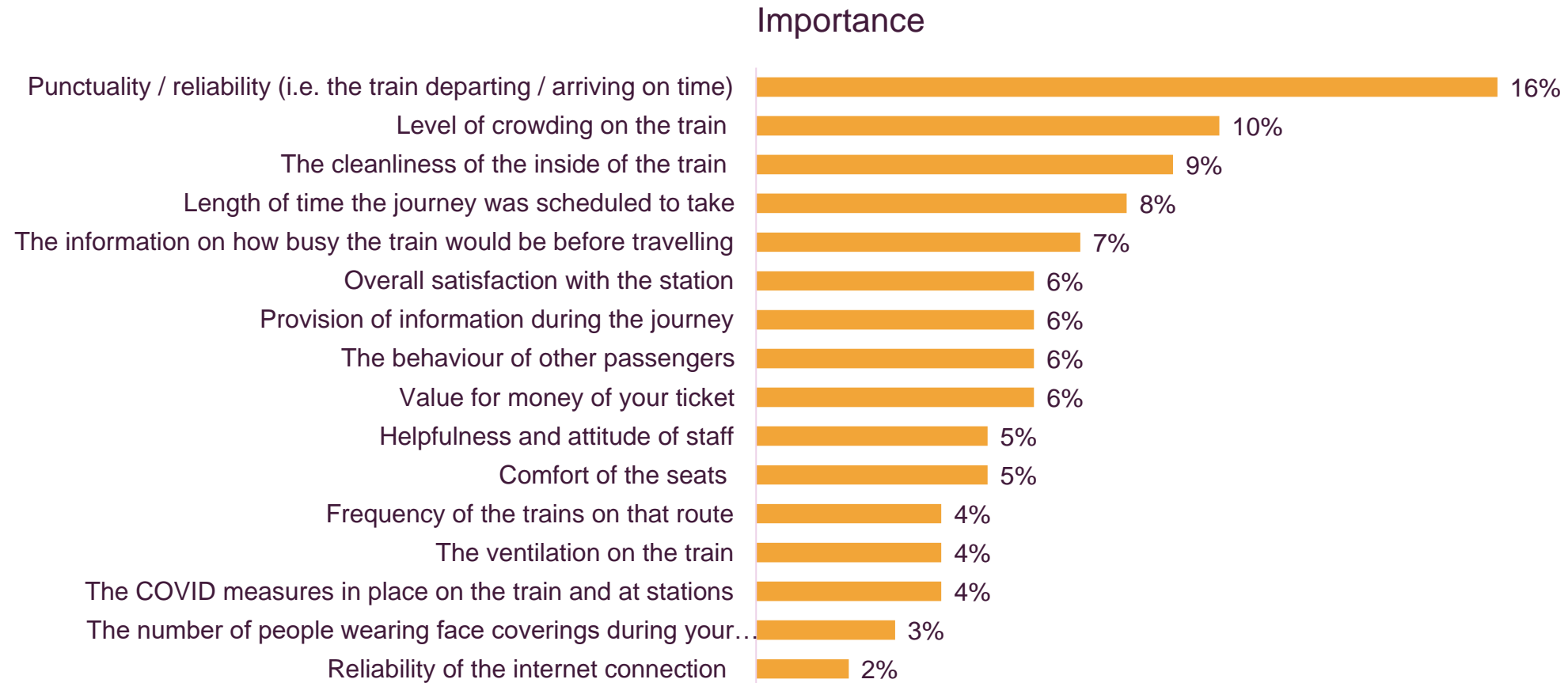


Additional data views:
key drivers of satisfaction
and results by TOC

The diagram features a central white rounded rectangle with the text 'Additional data views: key drivers of satisfaction and results by TOC'. To the left, there are icons for a location pin, a clock, and a hand holding a smartphone with thumbs up and down icons. To the right, there are icons for a train and three trees. Arrows indicate a flow from left to right, with some arrows pointing towards the central box and others pointing away from it.

Importance of all sixteen aspects asked in the survey

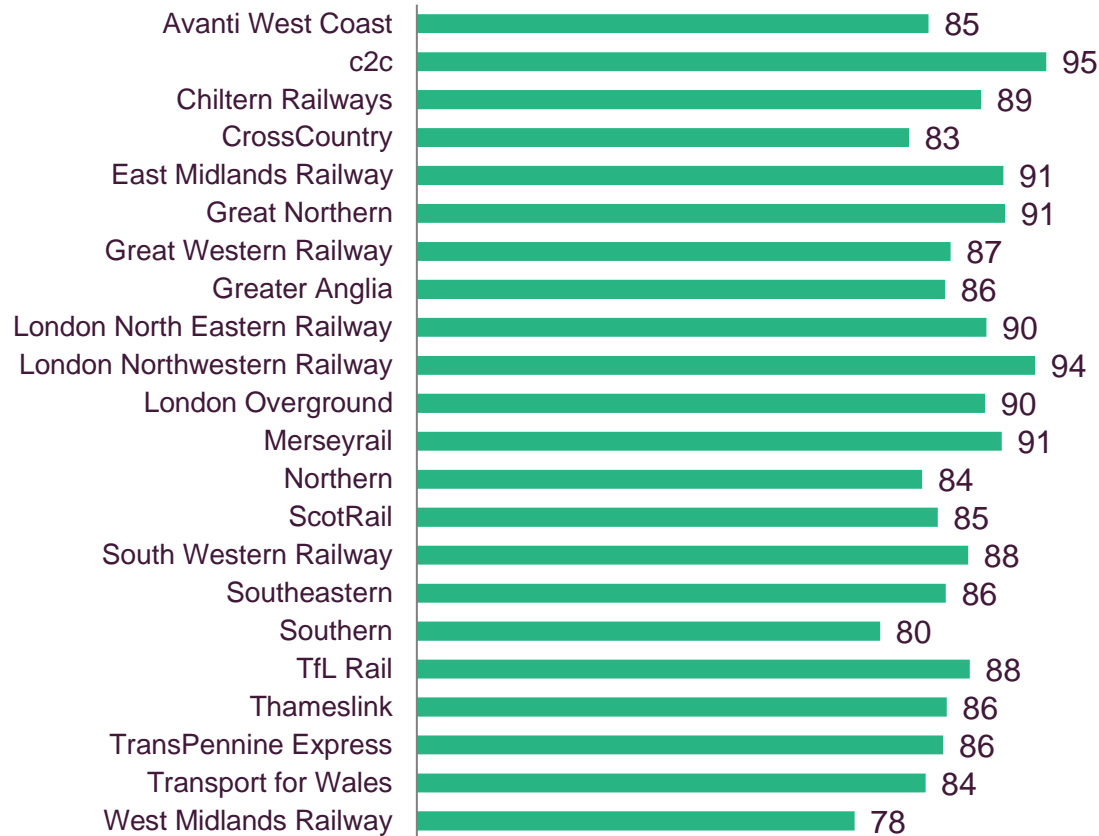
Punctuality/reliability has the most impact on overall satisfaction, followed by level of crowding and cleanliness inside the train.



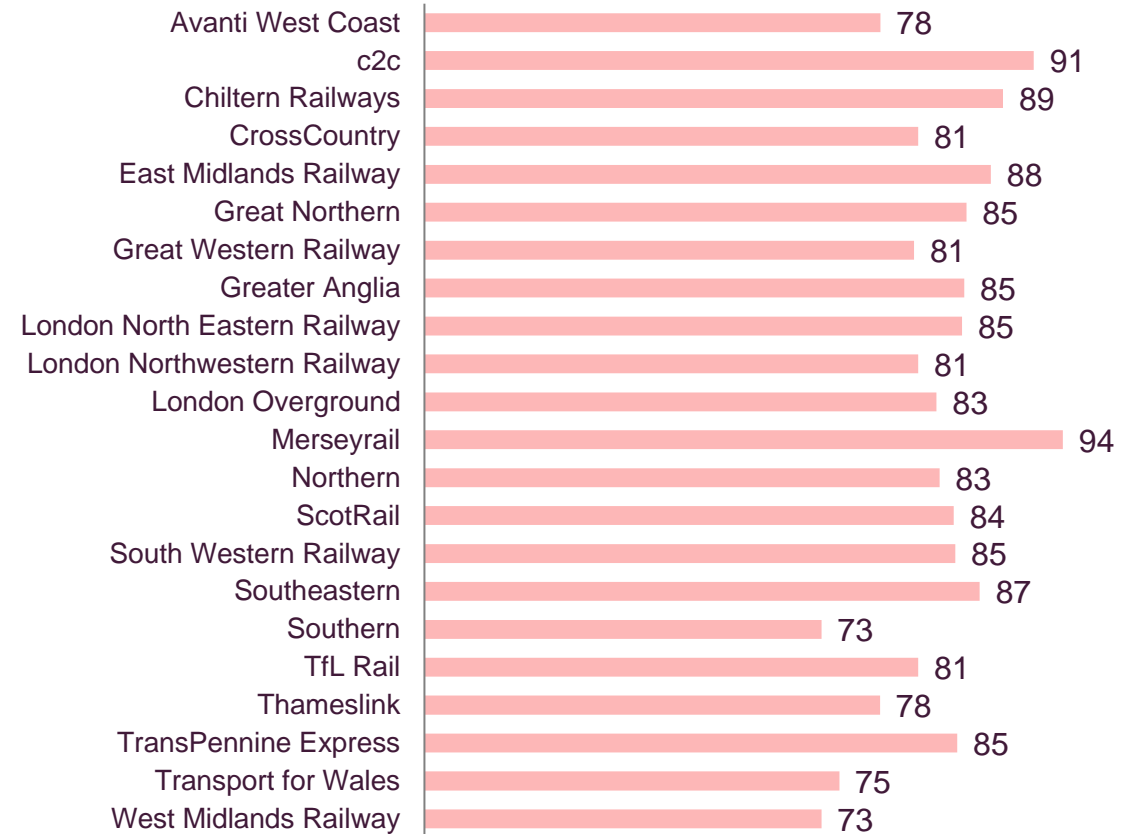
Key drivers of overall journey satisfaction. Base size: n = 1932. See methodology page for more detail.

Overall journey satisfaction and punctuality (over last 12 weeks)

Overall satisfaction %



Satisfaction with punctuality/reliability %

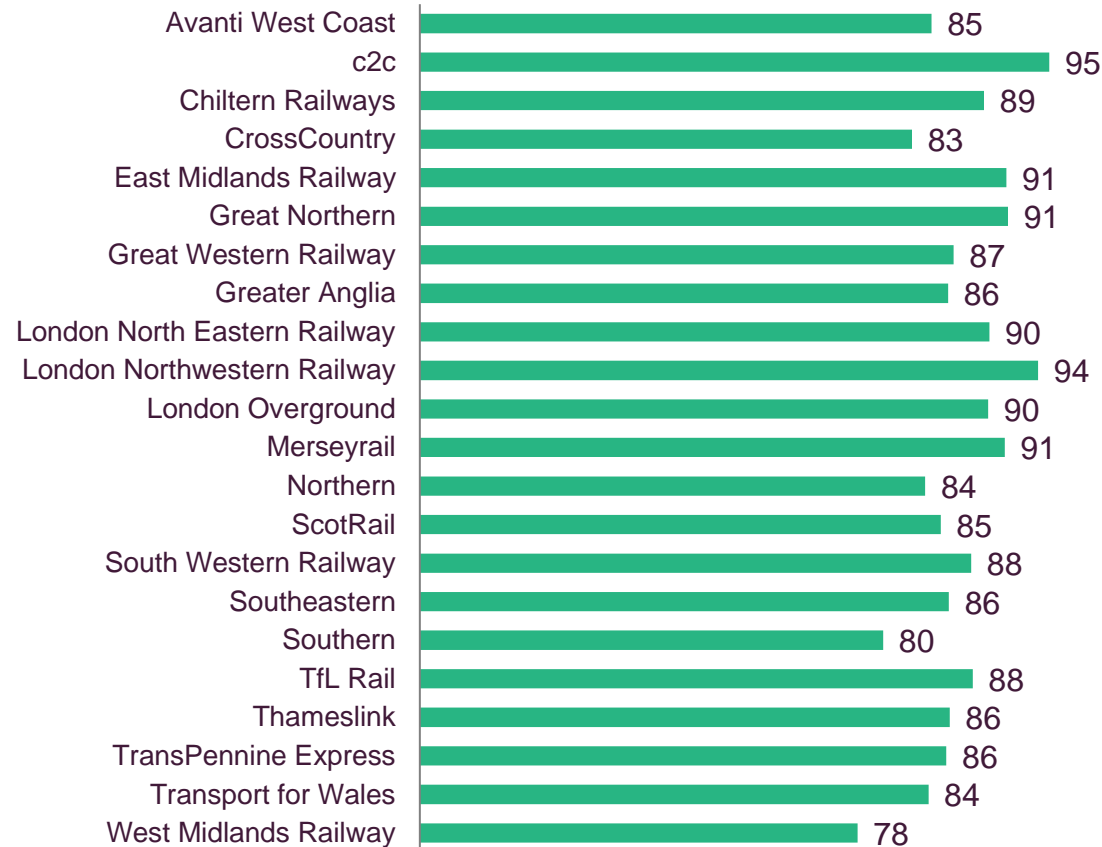


Base size: Avanti West Coast 155; c2c 68*; Chiltern Railways 67*; CrossCountry 131; East Midlands Railway 137; Great Northern 101; Great Western Railway 303; Greater Anglia 220; London North Eastern Railway 221; London Northwestern Railway 86*; London Overground 187; Merseyrail 116; Northern 346; ScotRail 323; South Western Railway 424; Southeastern 394; Southern 310; TfL Rail 231; Thameslink 219; TransPennine Express 134; Transport for Wales 96*; West Midlands Railway 160.

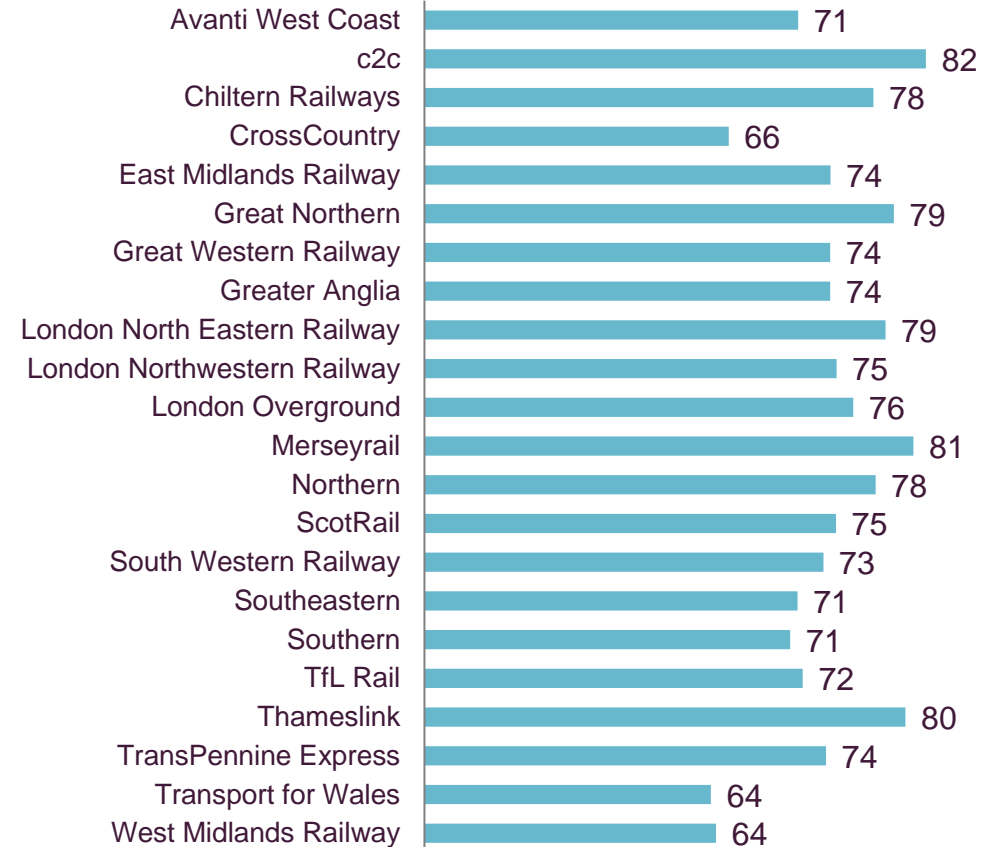
Note: Caution, some base sizes (marked *) are below 100, which would be the ideal minimum for analysis

Overall satisfaction and level of crowding (over last 12 weeks)

Overall satisfaction %



Satisfaction with level of crowding %



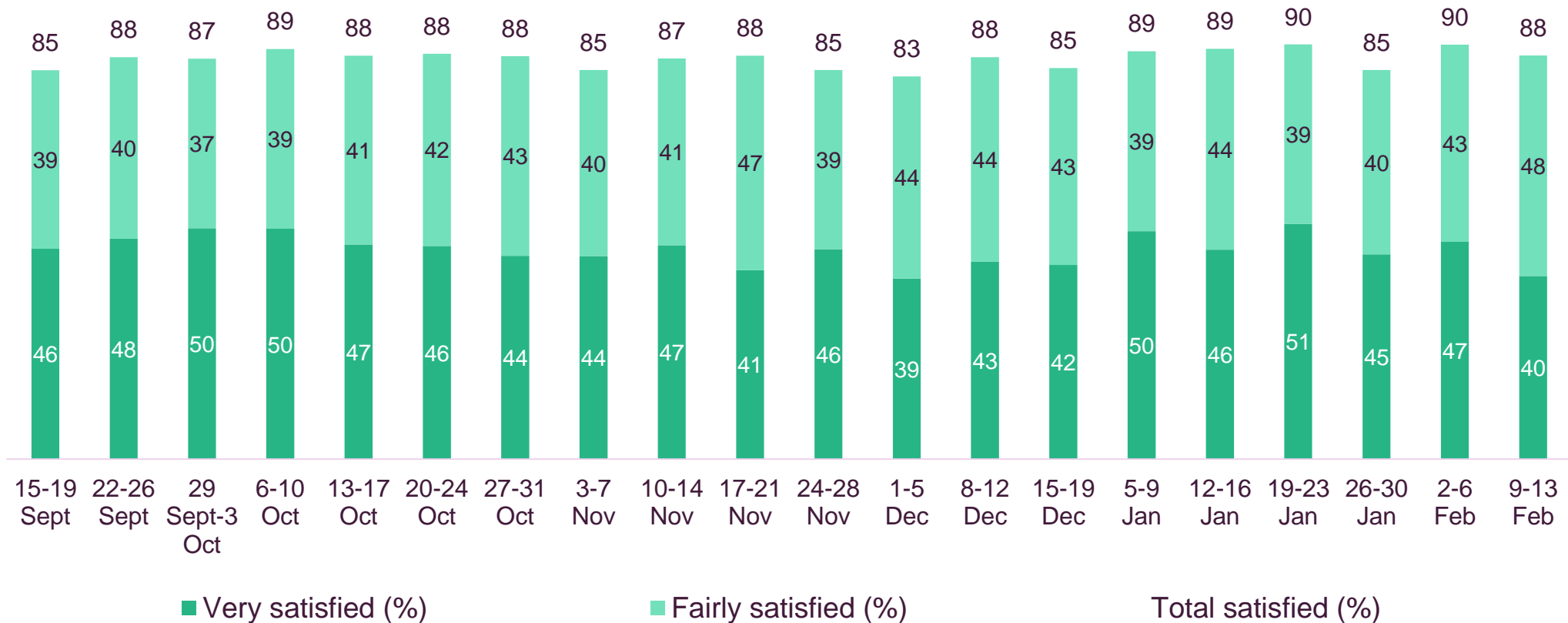
Base size: Avanti West Coast 155; c2c 68*; Chiltern Railways 67*; CrossCountry 131; East Midlands Railway 137; Great Northern 101; Great Western Railway 303; Greater Anglia 220; London North Eastern Railway 221; London Northwestern Railway 86*; London Overground 187; Merseyrail 116; Northern 346; ScotRail 323; South Western Railway 424; Southeastern 394; Southern 310; TfL Rail 231; Thameslink 219; TransPennine Express 134; Transport for Wales 96*; West Midlands Railway 160.

Note: Caution, some base sizes (marked *) are below 100, which would be the ideal minimum for analysis



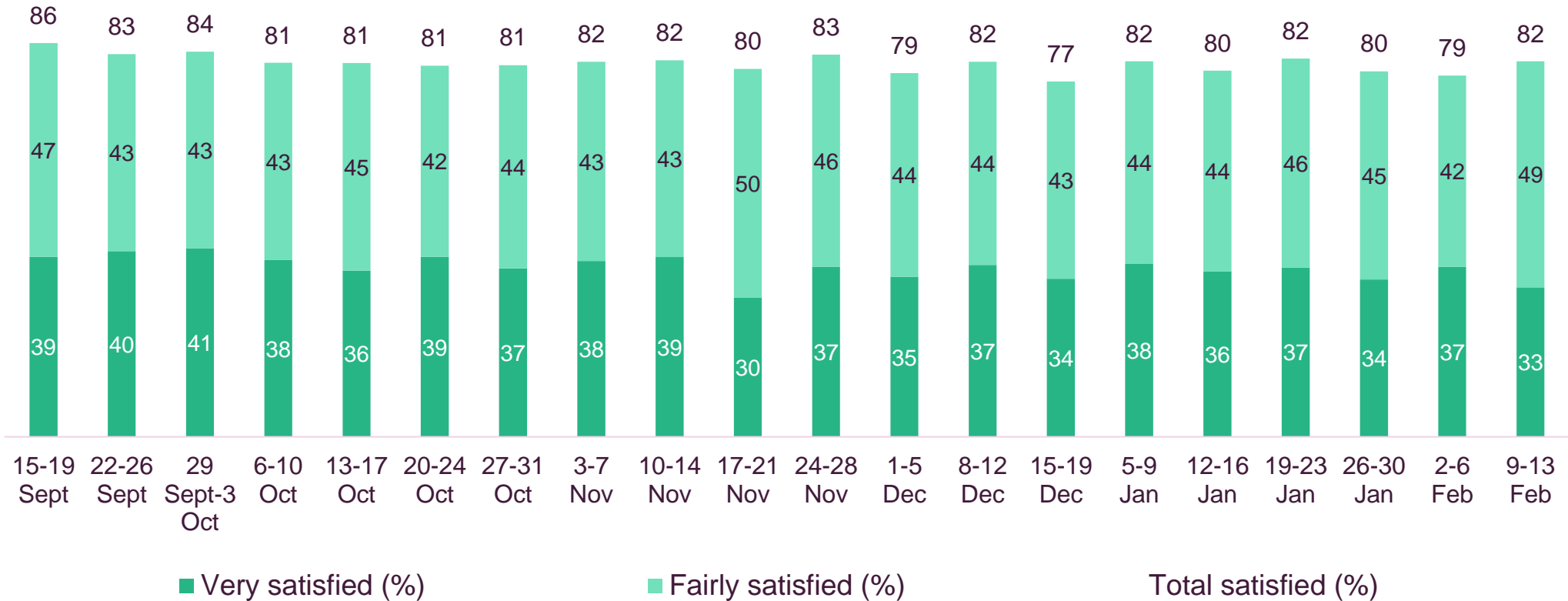
**Additional data views:
satisfaction trends**

Overall satisfaction with rail journey since September 2021



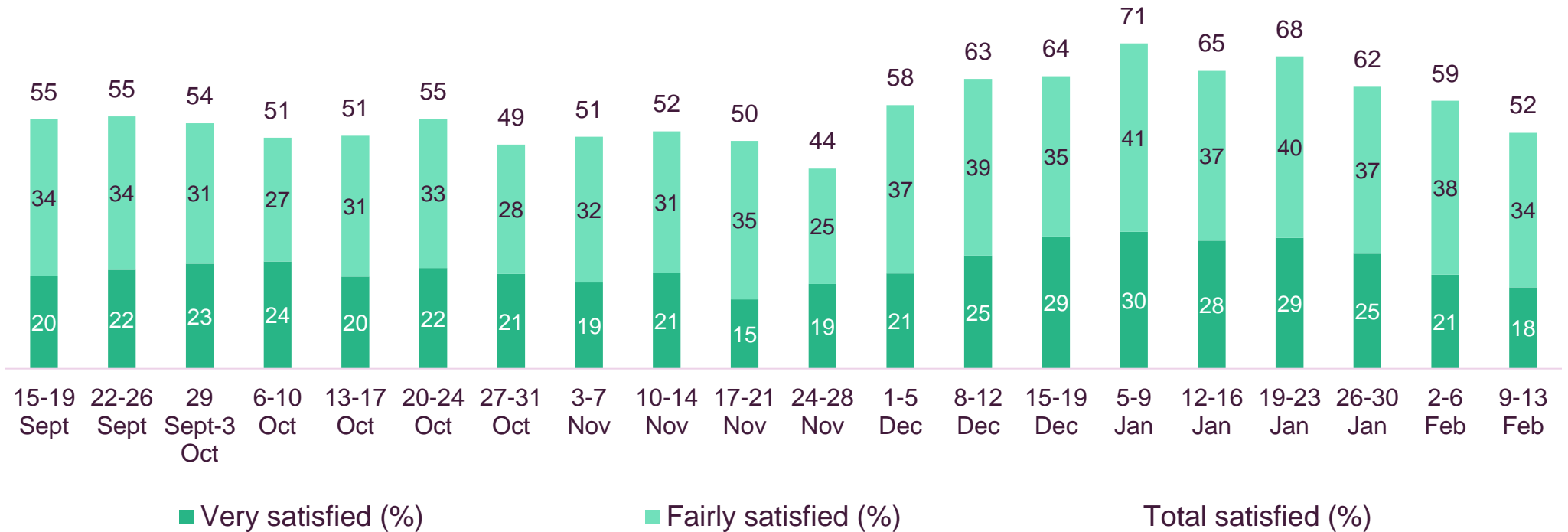
9 - 13 February 2022 report. Rail base size approx. 436 per week.

The cleanliness of the inside of the train



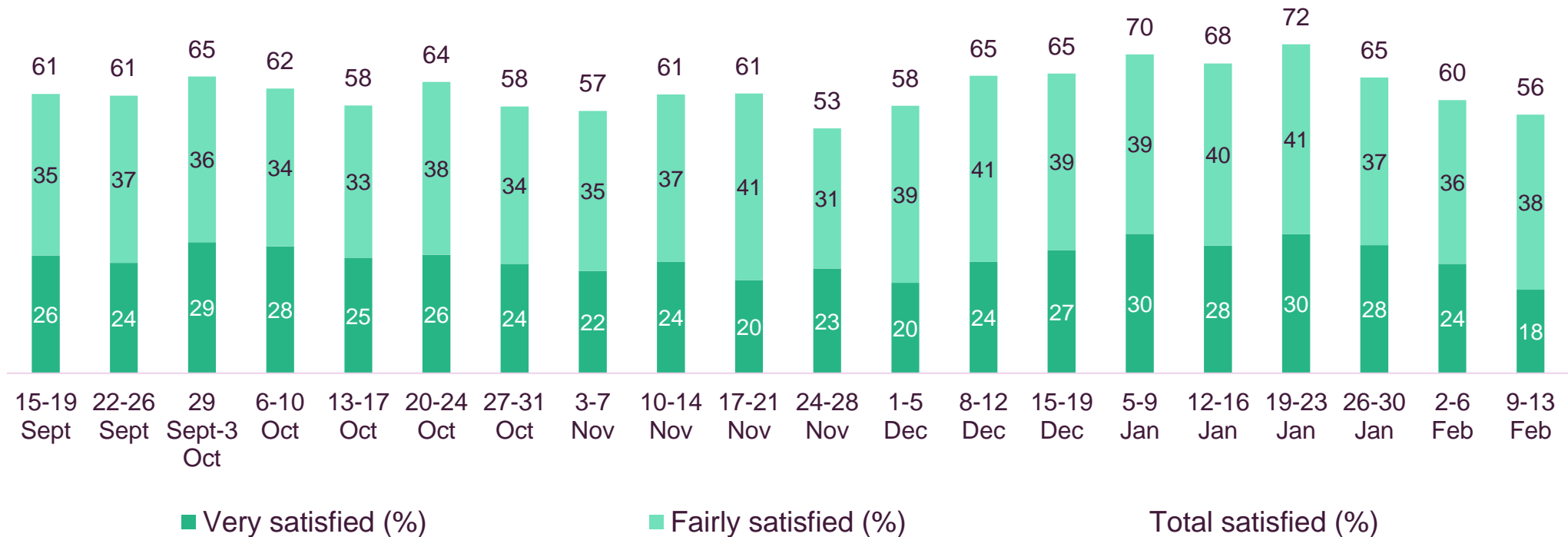
Trend analysis report. Base size average 435 per week.

The number of people wearing face coverings during your rail journey



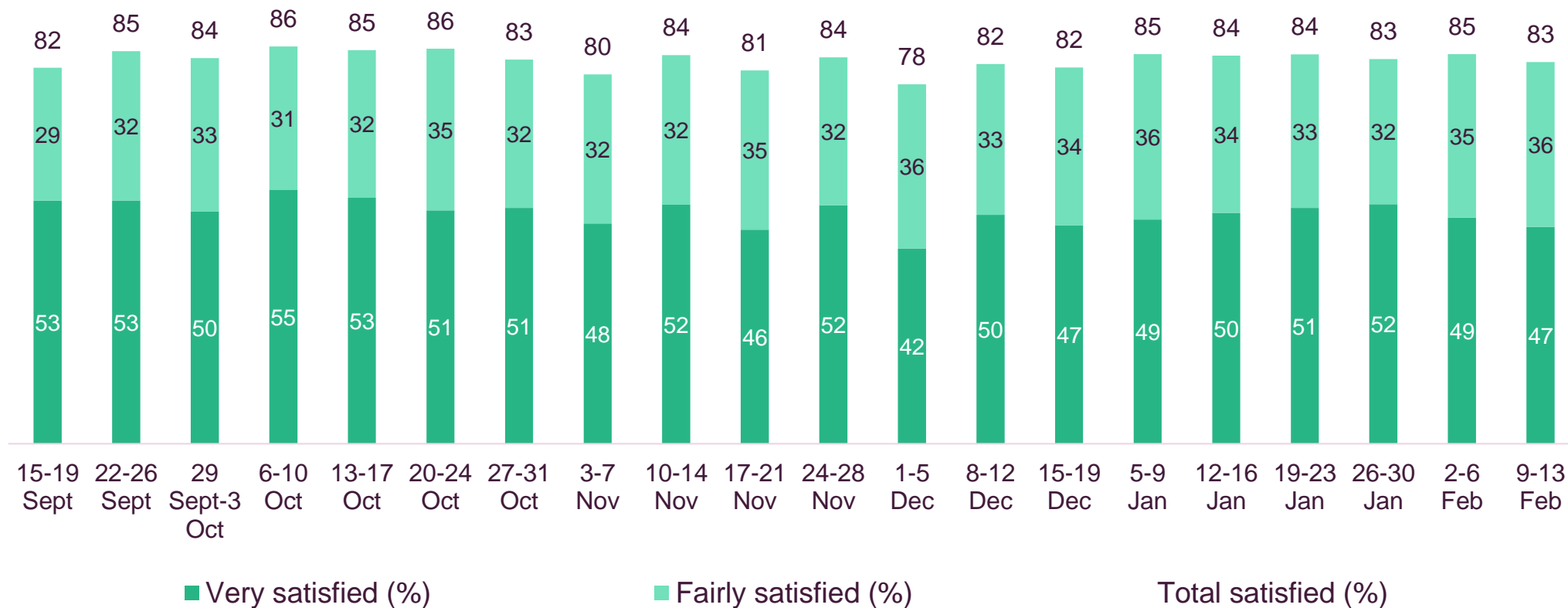
Trend analysis report. Base size average 427 per week.

The Covid measures in place on the train and at stations



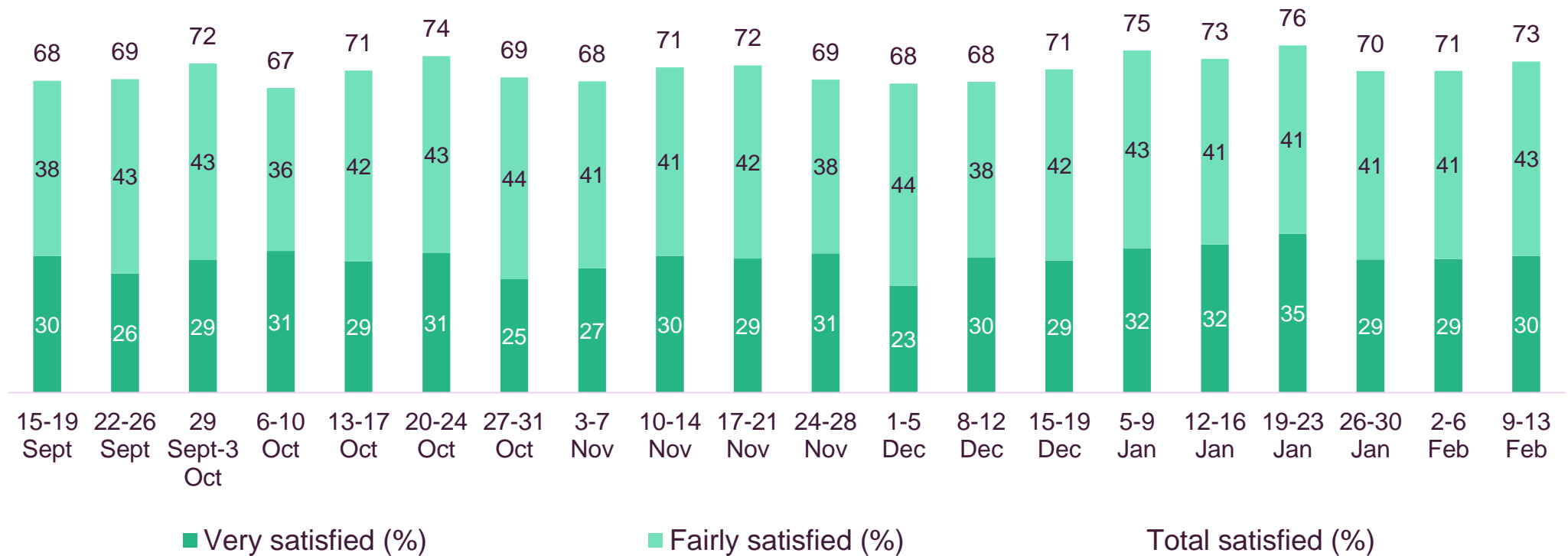
Trend analysis report. Base size average 426 per week.

Punctuality/reliability of the train



Trend analysis report. Base size average 435 per week.

The behaviour of other rail passengers



Trend analysis report. Base size average 433 per week.



**Much further
analysis possible**

Transport Focus Data Hub

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

Welcome

We are the independent transport user watchdog. Our mission is to get the best deal for passengers and road users.

From this page you can find the results of Transport Focus 'tracker' surveys (repeating surveys where we track user satisfaction over time).

Transport Focus has taken care to ensure that the information contained in the data hub is correct. However, no warranty, express or implied, is given as to its accuracy and Transport Focus does not accept any liability for error or omission.

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Please note, we are aware that there can be some limitations in functionality of the data hub when using Internet Explorer as your browser. We therefore recommend using another browser, such as Chrome, Firefox or Edge.

- Bus User Weekly Survey
- Rail User Weekly Survey
- Covid-19 Travel Survey
- Strategic Roads User Survey
- Logistics and Coach Survey: Strategic Roads
- Bus Passenger Survey
- National Rail Passenger Survey
- Passenger confidence barometer
- Motorway Services User Survey
- Tram Passenger Survey

Overall satisfaction with rail journey - over time

Breakdown for 26 to 30 Jan 22

- 1% Very dissatisfied
- 6% Fairly dissatisfied
- 9% Neither/nor
- 40% Fairly satisfied
- 45% Very satisfied

Week	% satisfied
24 to 28 Nov 21	85%
1 to 5 Dec 21	83%
8 to 12 Dec 21	88%
15 to 19 Dec 21	85%
5 to 9 Jan 22	89%
12 to 16 Jan 22	89%
19 to 23 Jan 22	90%
26 to 30 Jan 22	85%

* Caution - based on 75-99 responses | ** result hidden as less than 75 responses
Week 24 to 28 Nov 21, 1 to 5 Dec 21, 8 to 12 Dec 21, 15 to 19 Dec 21, 5 to 9 Jan 22, 12 to 16 Jan 22, 19 to 23 Jan 22, 26 to 30 Jan 22

Methodology

Transport Focus's *Rail User Weekly Survey* runs on the Wednesday to Friday and weekend waves of Yonder Consulting's omnibus. In total approximately 4000 per week are screened to identify those who have made a train journey (excluding London Underground) in the last seven days. These people then answer our dedicated Rail User Weekly Survey question set; the question text is provided in the following appendix.

Yonder Consulting's omnibus is weighted to be nationally representative of the population of Great Britain. The analysis of satisfaction questions excludes responses from those who say that the question is not applicable to them. The omnibus survey asks questions about a

variety of matters from a range of client organisations. Not all those interviewed through Yonder Consulting's omnibus are passengers on public transport. Numbers may not add up to 100 per cent, due to rounding.

Care should be taken in drawing comparisons given the low sample sizes in some cases. For instance, differences in satisfaction ratings between TOCs may not be statistically significant.

The key drivers of overall satisfaction analysis was produced by Yonder Consulting based on four weeks of data (between 20 October and 14 November). The statistical approach taken was Johnson's Relative Weights which is a regression method that

quantifies the importance of predictor variables. The predictive value of 16 attributes of journey experience were assessed. The attribute 'overall satisfaction with the train' was excluded as the component measures while on the train are separately asked. The model's R squared value is 0.58.

One of the most common issues in datasets is multicollinearity and Johnson's Relative Weights tackles this issue well. Compared to different approaches, JRW has better underpinnings and often produces clear results even in circumstances when the predictors are highly correlated.

Appendix: survey question text

1. Overall satisfaction: Overall how satisfied were you with this train journey?

Scale: Very satisfied to Very dissatisfied

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

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

Further analysis



I can provide bespoke further analyse or further information if required.

Murray Leader

Senior insight adviser

Murray.Leader@transportfocus.org.uk