

A stylized graphic of a rail track, consisting of a series of vertical bars connected by horizontal lines, rendered in a dark blue color.

# National Rail Passenger Survey Spring 2020

A stylized graphic of a rail track, consisting of a series of vertical bars connected by horizontal lines, rendered in a dark blue color.

Summary of results

Research & Insight team, corporate communications

# Contents

- **Journey satisfaction** results by:
  - regional structure;
  - route structure;
  - passenger type;
  - TOCs;
  - factors most important in driving satisfaction.
- **Managed Station** results:
  - benchmarked against each other;
  - benchmarked against non-NR stations;
  - Priorities for improvement.
- **Summary**

## Background

- The National rail passenger survey (NRPS) has been undertaken by Transport Focus since 1999
- Almost 19,850 passenger interviews undertaken in Spring 2020. Takes place twice a year to understand journey satisfaction by individual TOCs and various measures (e.g. cleanliness, VfM, availability of staff etc.)
  - Fieldwork for this wave was carried out from 15<sup>th</sup> January to 28<sup>th</sup> March 2020
  - 30k interview under normal circumstances
- Network Rail commissions Transport Focus to “boost” the number of interviews at managed stations to get robust station satisfaction scores
  - A total sample of 7,625 respondents was achieved across all 20 Network Rail Managed Stations
- Comparisons are made against Spring 2019 results

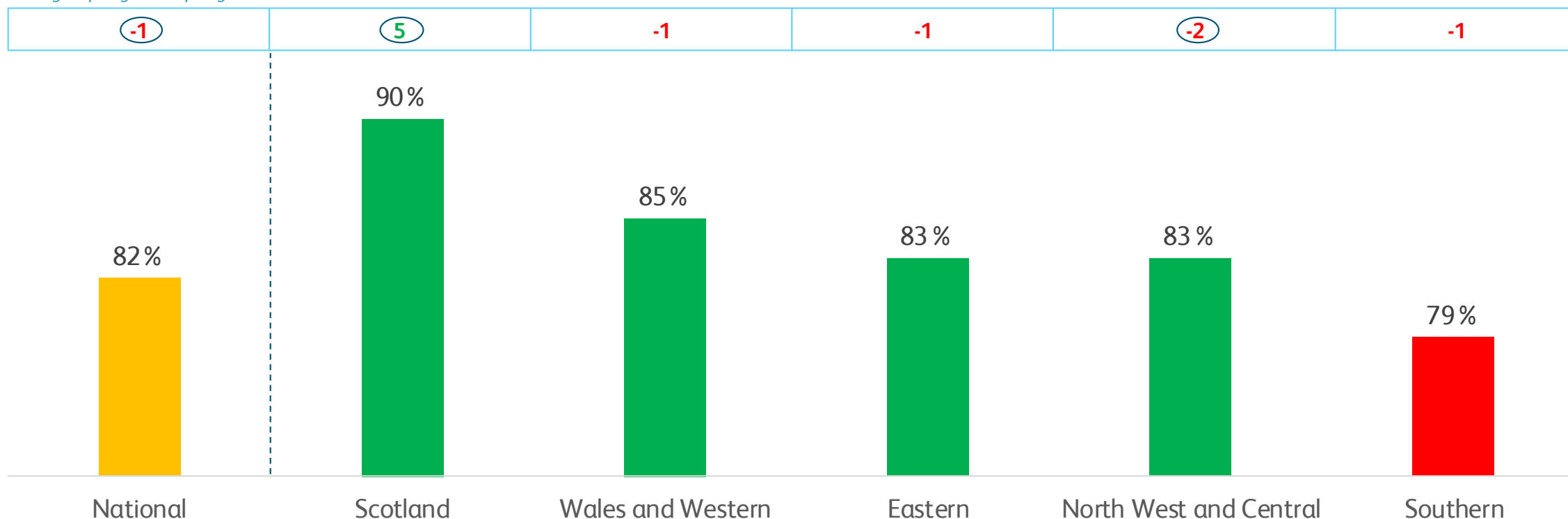
# Journey satisfaction results

**National & regions: Overall journey satisfaction has decreased significantly nationally and in **North West and Central**. Satisfaction is highest in **Scotland** where it also increased significantly**

Overall journey satisfaction: nationally and amongst NR regions

(Spring '20)

Change: Spring '19 – Spring '20



**○** = Statistically significant change since Spring 19

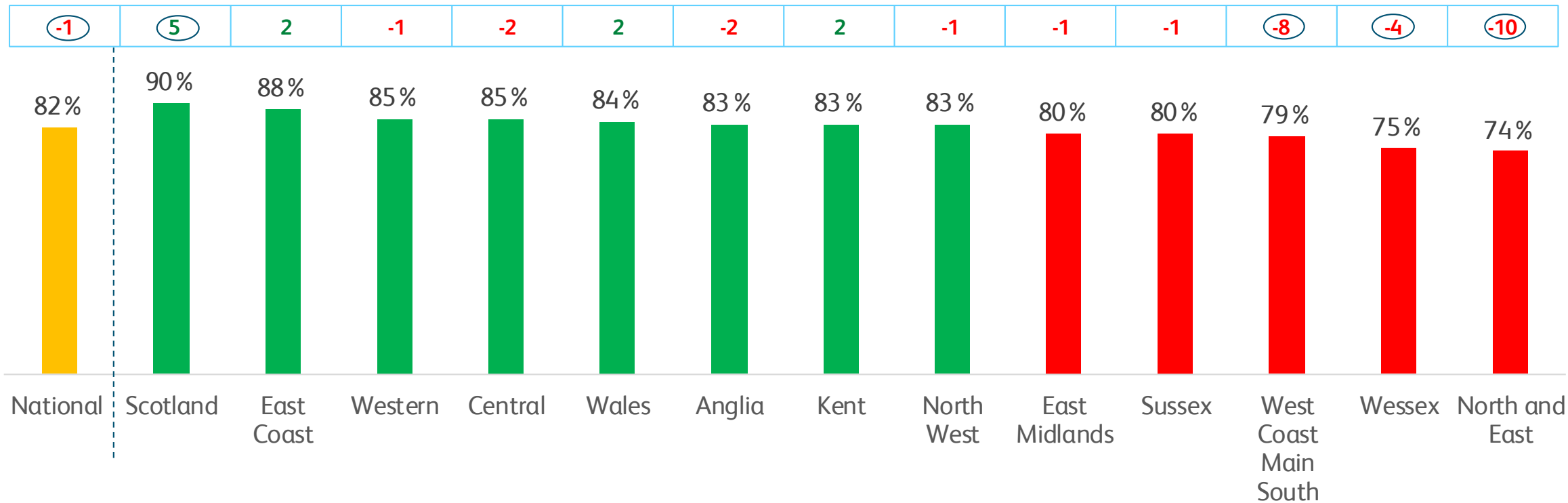
As a result of COVID-19, in Spring 2020 boosted samples were included in the main weighted data set (excluding Heathrow Rail), and were weighted to reflect journeys made on all franchised TOCs

**Routes: Only Scotland had a significant increase in overall journey satisfaction. North and East, West Coast Main South and Wessex all had a significant decrease**

Overall journey satisfaction: nationally and amongst NR routes

(Spring '20)

Change: Spring '19 – Spring '20



  = Statistically significant change since Spring 19

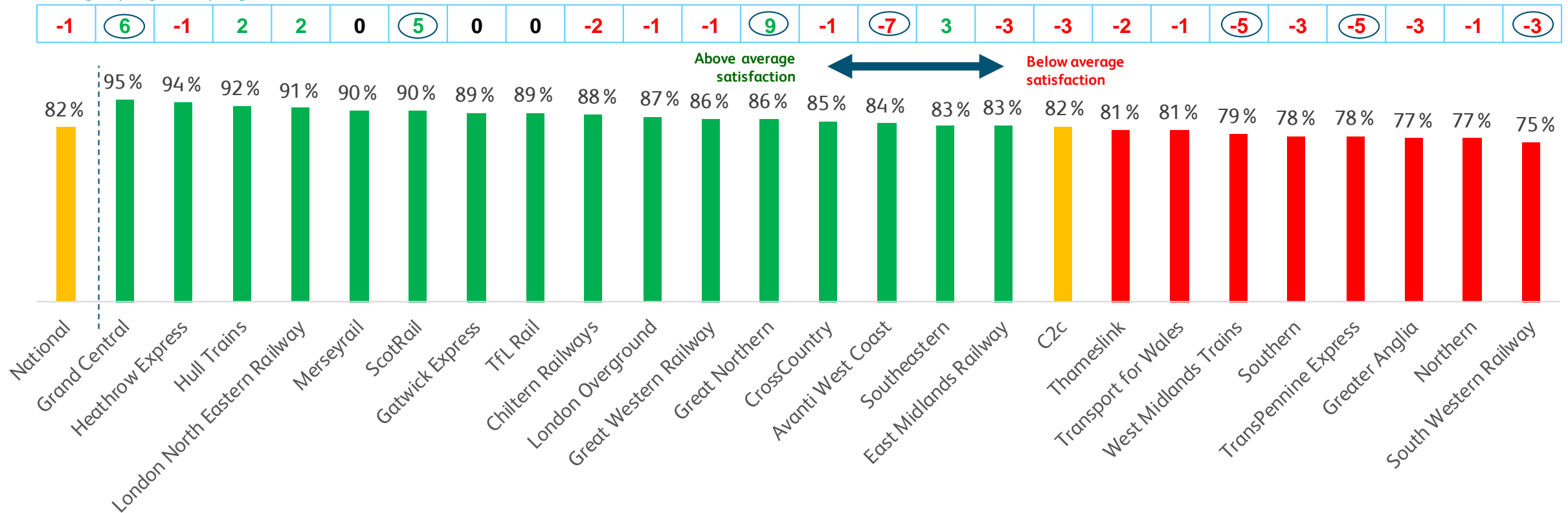
As a result of COVID-19, in Spring 2020 boosted samples were included in the main weighted data set (excluding Heathrow Rail), and were weighted to reflect journeys made on all franchised TOCs

**TOCs: Grand Central passengers have the highest levels of satisfaction, while South Western Railway have the lowest. Great Northern has had the largest percentage point increase in satisfaction, while Avanti West Coast has had the largest decrease**

Overall journey satisfaction: nationally and at TOC level

(Spring '20)

Change: Spring '19 – Spring '20



= Statistically significant change since Spring 2019

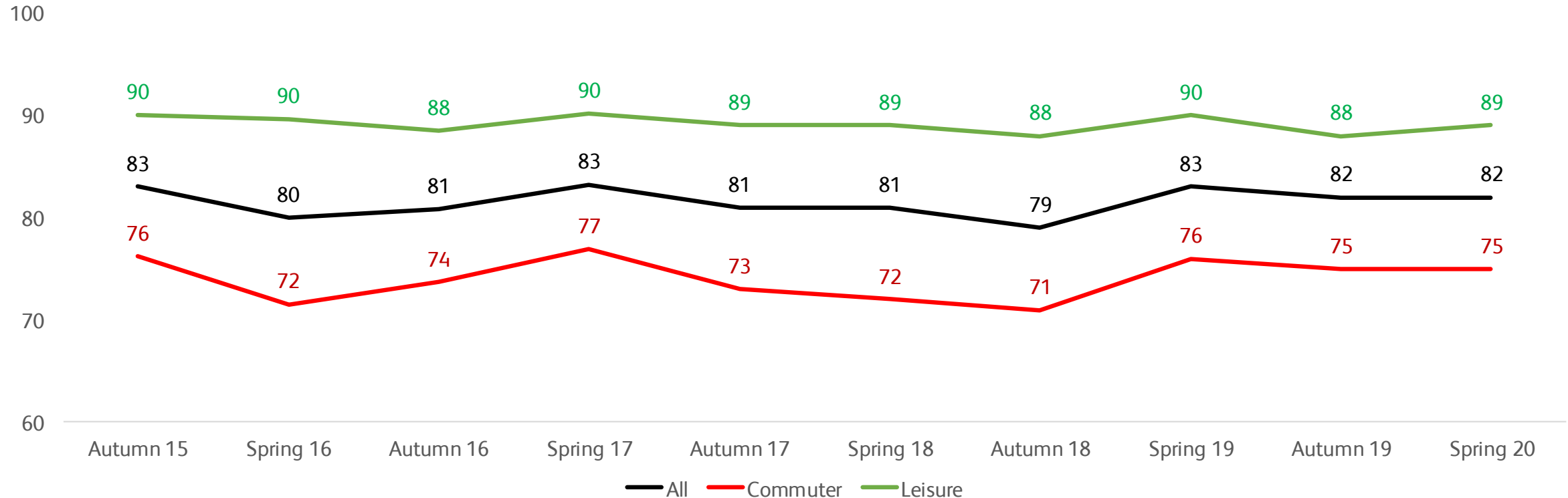
As a result of COVID-19, in Spring 2020 boosted samples were included in the main weighted data set (excluding Heathrow Rail), and were weighted to reflect journeys made on all franchised TOCs

# Passenger type: leisure passengers have the highest levels of satisfaction over time. Satisfaction remains lowest amongst commuters



Overall journey satisfaction: by journey purpose

(Trend)



As a result of COVID-19, in Spring 2020 boosted samples were included in the main weighted data set (excluding Heathrow Rail), and were weighted to reflect journeys made on all franchised TOCs



# What shapes passenger satisfaction?

# What drives satisfaction?

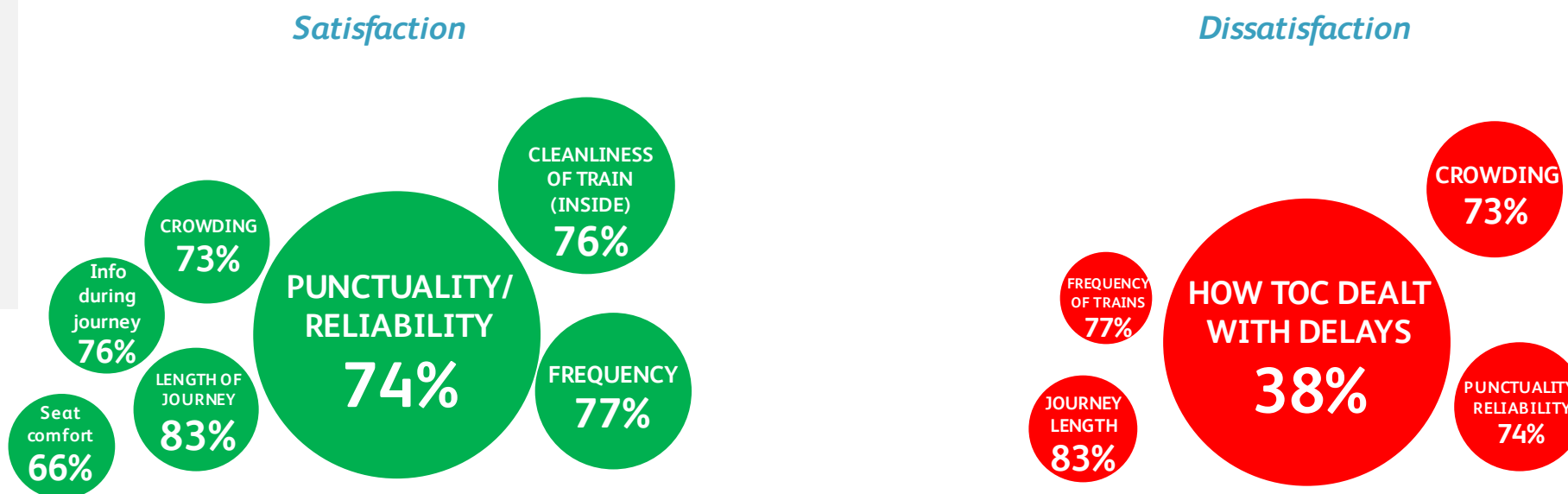
- **Punctuality and reliability of train services, and; on board cleanliness, are key in driving satisfaction**
- **How delays are dealt with is the key driver of dissatisfaction**

*'Key drivers' of overall journey satisfaction / dissatisfaction*

*% satisfied*

*(Autumn 2019 - Spring 2020 combined)*

Some factors have a greater influence on whether a passenger is satisfied with the overall journey than others. The size of the circle denotes relative importance of the top drivers of satisfaction and dissatisfaction, so the biggest is the most important driver.



*a result of COVID-19, in Spring 2020 boosted samples were included in the main weighted data set (excluding Heathrow Rail), and were weighted to reflect journeys made on all franchised TOCs. Chart displays importance for ratings with 4% or greater.*

# Regional performance against drivers of satisfaction: Wales and Western and Scotland all score above average for measures that drive overall journey satisfaction. While Southern are below average for all key metrics



## Key metric heat map of the top key drivers of satisfaction or dissatisfaction

Figures indicate the top 2 box ratings for each measure

Colour key:  
 Above average satisfaction  
 Below average satisfaction  
 Average satisfaction

	National	Eastern	North West and Central	Scotland	Southern	Wales and Western
Overall Journey	82	83	83	90	79	85
Punctuality / reliability	74	76	73	78	71	77
Cleanliness inside train	76	79	75	80	73	81
Frequency of trains on route	77	77	78	81	74	78
Scheduled journey length	83	85	84	91	80	87
Level of crowding	73	73	72	80	72	78
How TOC dealt with delays	38	40	38	54	35	44

As a result of COVID-19, in Spring 2020 boosted samples were included in the main weighted data set (excluding Heathrow Rail), and were weighted to reflect journeys made on all franchised TOCs

**Regional yr/yr change against key scores: Scotland has seen increases in satisfaction across all key driver metrics. While North West & Central has seen decreases in satisfaction across four of the six key driver metrics**

Key metric heat map of the top key drivers of satisfaction or dissatisfaction

Figures indicate the % point change for top 2 box ratings for each measure

Change: Spring '19 – Spring '20

	National	Eastern	North West & Central	Scotland	Southern	Wales & Western
Overall Journey	-1	-1	-2	5	-1	-1
Punctuality / reliability	-3	-3	-7	2	-2	-2
Cleanliness inside train	1	2	1	2	0	1
Frequency of trains on route	1	2	-2	5	0	1
Scheduled journey length	-1	0	-3	4	-1	1
Level of crowding	1	1	0	7	1	5
How TOC dealt with delays	-2	-2	-9	14	-2	0

Key Drivers

# Route performance against key scores: **Scotland** has had improvements in satisfaction across all key driver measures. While **North and East** and **West Coast Main Line South** have all decreased.

Key metric heat map of the top key drivers of **satisfaction** or **dissatisfaction**

Figures indicate the % point change for top 2 box ratings for each measure

Change: Spring '19 – Spring '20

	National	Anglia	Central	East Coast	East Midlands	Kent	North and East	North West	Scotland	Sussex	Wales	Wessex	Western	West Coast Main Line South
Overall Journey	-1	-2	-2	2	-1	2	-10	-1	5	-1	2	-4	-2	-8
Punctuality / reliability	-3	-2	-10	-2	-6	1	-20	-4	2	-2	-7	-4	0	-12
Cleanliness inside train	1	-1	2	0	9	3	-1	3	2	-1	10	-1	-2	-5
Frequency of trains on route	1	1	-3	4	2	2	-10	-1	5	1	3	-2	0	-4
Scheduled journey length	-1	0	-4	1	0	2	-9	-1	4	-2	1	-4	0	-8
Level of crowding	1	0	-1	6	-1	3	-3	2	7	1	7	0	4	-4
How TOC dealt with delays	-2	1	-13	-5	6	-3	-25	-8	14	3	-6	-4	2	-9

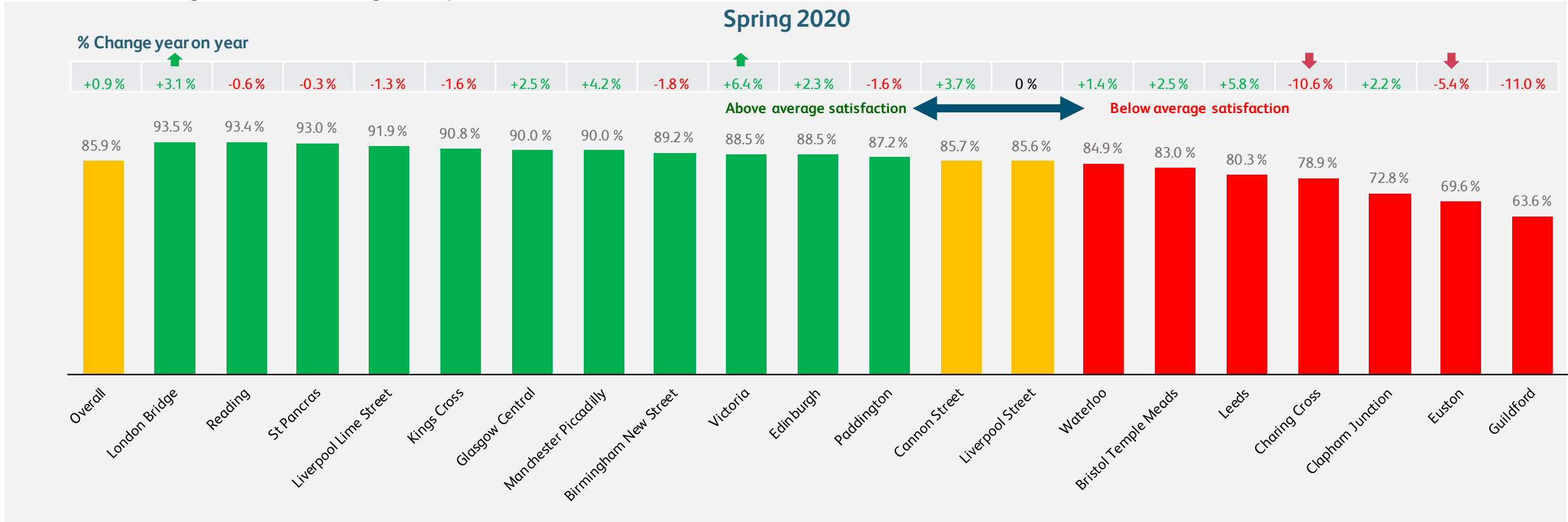
# Managed station results

# Overall NR managed station satisfaction; London Bridge comes top for first time



- Station satisfaction has increased significantly year on year at two Network Rail stations – **London Bridge** and **Victoria**.
- **Charing Cross** and **Euston** have both seen significant decreases in satisfaction year on year

Network Rail Managed Stations: Passenger satisfaction with station



Statistically significant change versus Spring 2019 

Q21 How satisfied are you with [INSERT] station overall?  
 Base: All passengers at Network Rail managed stations (n=7625 Spring 2020, excludes don't know/no opinion)

# Managed Station performance rating: all station average past 10 years



- All attributes have shown progress over last ten years
- Top 2 box good rating (very/fairly)

	Aut '10	Spr '11	Aut '11	Spr '12	Aut '12	Spr '13	Aut '13	Spr '14	Aut '14	Spr '15	Aut '15	Spr '16	Aut '16	Spr '17	Aut '17	Spr '18	Aut '18	Spr '19	Aut '19	Spr '20
<b>OVERALL SATISFACTION</b>	82 %	81 %	81 %	80 %	84 %	82 %	83 %	83 %	83 %	82 %	84 %	83 %	85 %	84 %	85 %	85 %	84 %	85 %	85 %	86 %
Connections with public transport	86 %	86 %	84 %	84 %	87 %	85 %	85 %	85 %	85 %	85 %	86 %	85 %	85 %	87 %	88 %	89 %	89 %	89 %	88 %	89 %
Provision of info about train times	84 %	84 %	85 %	84 %	86 %	86 %	85 %	83 %	83 %	83 %	84 %	84 %	83 %	87 %	86 %	87 %	87 %	88 %	87 %	89 %
Ticket buying facilities	72 %	73 %	73 %	71 %	74 %	76 %	73 %	75 %	71 %	74 %	74 %	75 %	76 %	78 %	80 %	84 %	83 %	83 %	84 %	85 %
Cleanliness of the station	76 %	74 %	74 %	72 %	78 %	76 %	78 %	78 %	79 %	79 %	79 %	79 %	83 %	82 %	82 %	82 %	81 %	81 %	81 %	82 %
Upkeep of the station buildings	71 %	70 %	68 %	67 %	75 %	74 %	75 %	74 %	76 %	75 %	77 %	76 %	79 %	79 %	80 %	81 %	79 %	80 %	80 %	80 %
Provision of shelter facilities	-	-	-	-	75 %	68 %	71 %	68 %	73 %	67 %	74 %	71 %	76 %	77 %	80 %	77 %	80 %	79 %	81 %	80 %
Attitudes and helpfulness of the staff	66 %	66 %	68 %	65 %	69 %	68 %	71 %	69 %	70 %	71 %	73 %	72 %	73 %	75 %	75 %	75 %	76 %	75 %	77 %	79 %
Choice of shops/eating/drinking	-	-	-	-	-	68 %	69 %	69 %	70 %	69 %	70 %	69 %	70 %	74 %	75 %	76 %	76 %	76 %	74 %	77 %
Personal security at station	71 %	71 %	69 %	68 %	74 %	72 %	73 %	72 %	74 %	73 %	73 %	74 %	75 %	76 %	76 %	75 %	75 %	75 %	76 %	75 %
Availability of staff at the station	59 %	59 %	60 %	59 %	62 %	62 %	63 %	62 %	63 %	64 %	66 %	65 %	65 %	68 %	68 %	70 %	68 %	71 %	71 %	74 %
Toilet facilities at station	-	-	-	-	-	-	-	-	-	-	-	-	-	53 %	55 %	55 %	53 %	53 %	61 %	66 %
Facilities for bicycle parking	37 %	36 %	36 %	34 %	38 %	43 %	43 %	42 %	48 %	49 %	47 %	46 %	50 %	54 %	51 %	51 %	46 %	53 %	52 %	52 %
Availability of Wi-fi	-	-	-	-	-	-	-	-	-	-	-	-	33 %	39 %	39 %	43 %	46 %	45 %	46 %	50 %
Availability of seating	-	-	-	-	31 %	30 %	30 %	31 %	31 %	33 %	32 %	33 %	35 %	39 %	38 %	40 %	40 %	43 %	46 %	49 %
Facilities for car parking	25 %	27 %	26 %	22 %	24 %	25 %	27 %	25 %	31 %	30 %	32 %	33 %	31 %	31 %	29 %	27 %	28 %	30 %	30 %	30 %



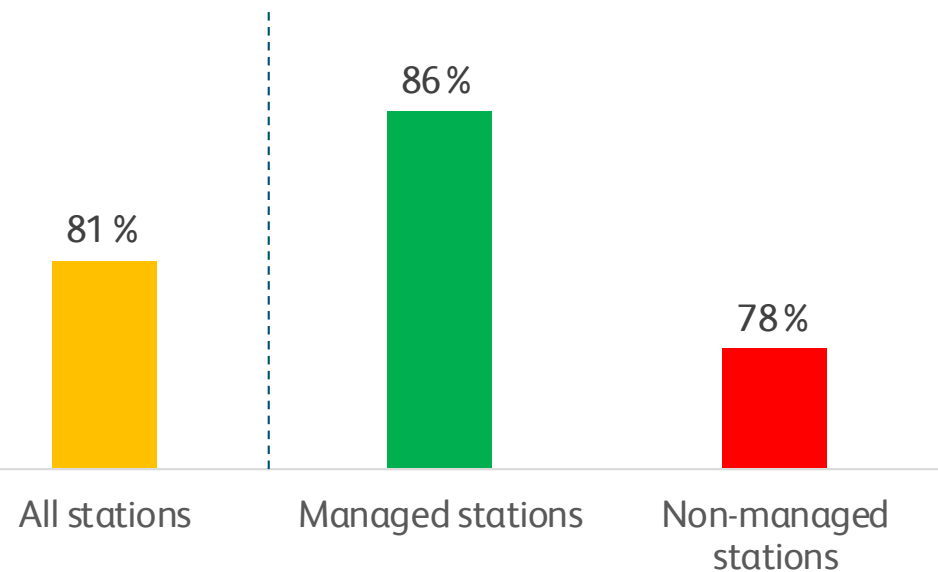
# Station satisfaction continues to remain higher for NR managed stations, compared to other stations on the network

- Satisfaction is down significantly when **passengers experience delays**

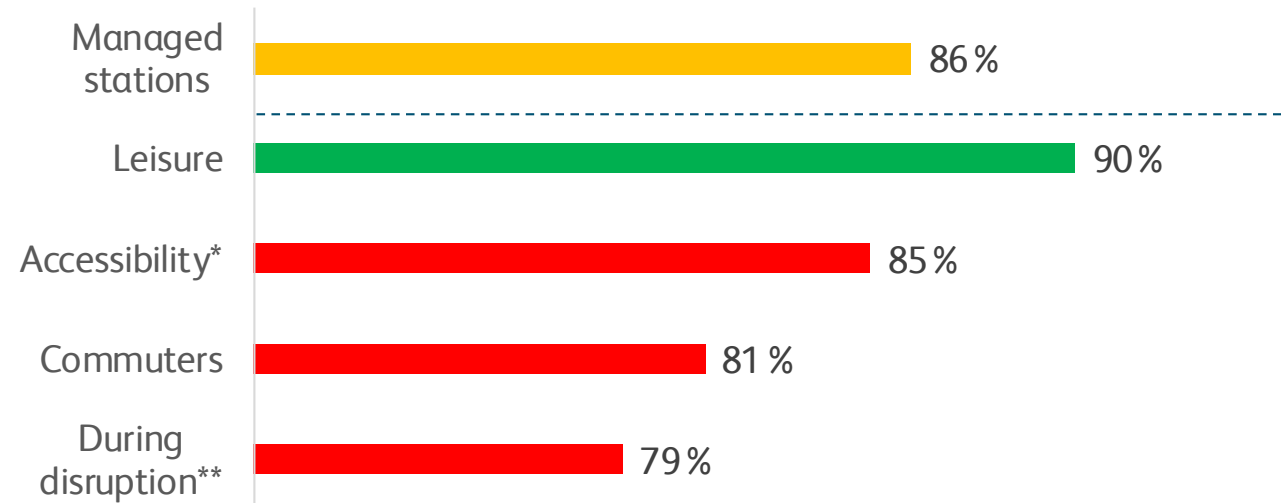
Passenger satisfaction with station (Spring '20)

Change: Spring '19 – Spring '20

1	1	0
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Passenger satisfaction with station (Spring '20)

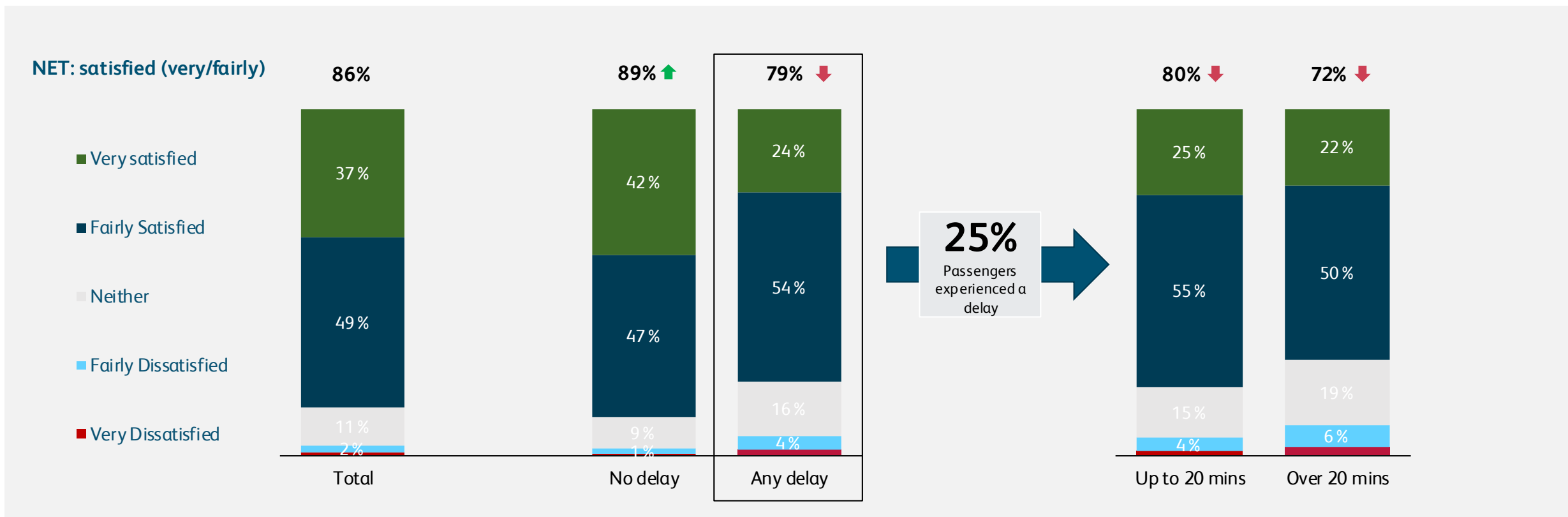


\*Accessibility represents all passengers with a long-term health condition

\*\*During disruption represents passengers who experienced a delay

# Overall NR managed station satisfaction: *impact of delay*

- Station satisfaction is significantly higher among passengers who did not experience any delay on their journey
- Station satisfaction reduces by length of delay, with those experiencing delays of over 20mins showing the lowest levels of satisfaction at 72%



Indicates significant difference versus Total Spring 2020 ↑ ↓

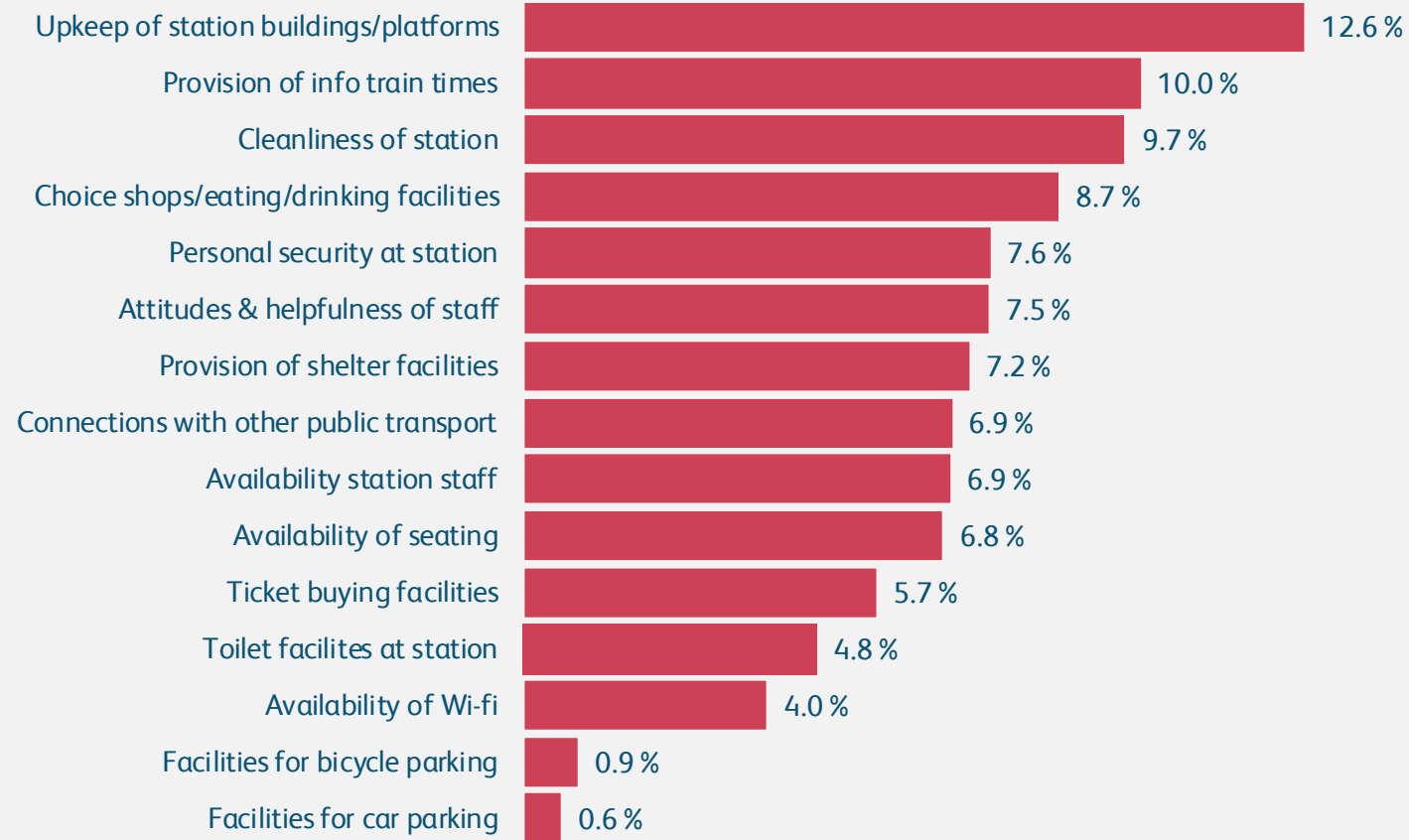
Q21 How satisfied are you with [INSERT] station overall?  
 Base: All passengers at Network Rail managed stations (n=7625 Spring 2020, excludes don't know/no opinion)

# What station satisfaction?

## Drivers of station satisfaction: all NR managed stations

- The top station driver of overall station satisfaction is **upkeep of station**, followed by **provision of information and cleanliness**.
- Car and bicycle parking facilities** have the lowest impact on station satisfaction amongst the station attributes

% share of impact on overall station satisfaction: All passengers



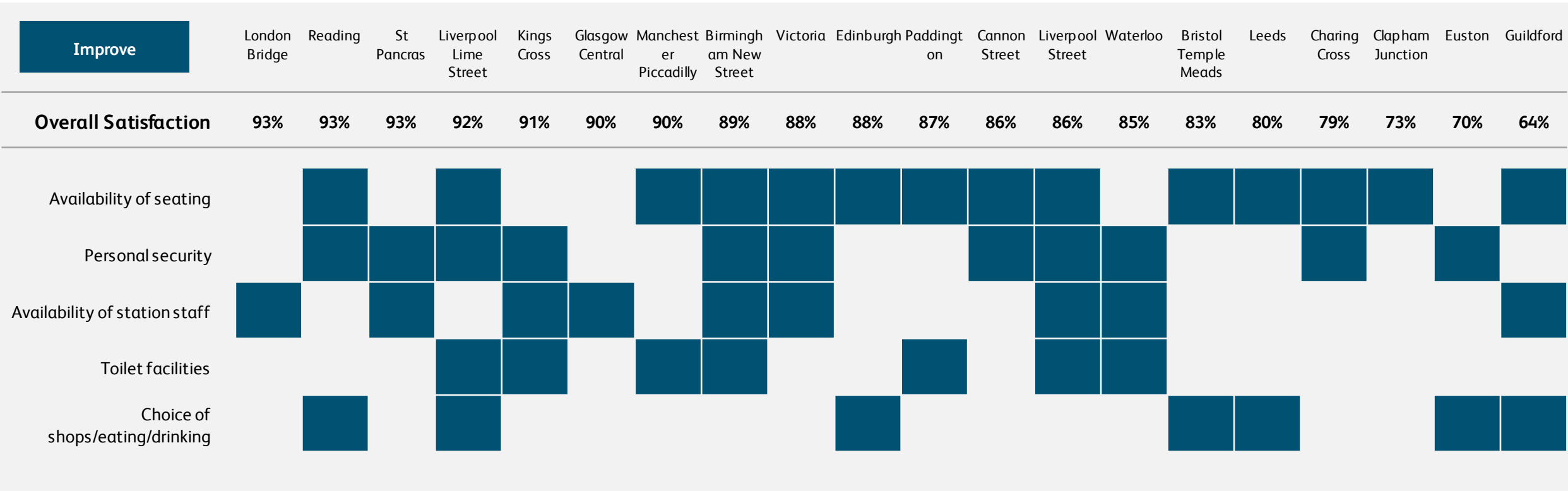
Share of impact

Station attributes  
100 %

*Rsq=58%*

# Improvement areas by NR managed stations

- There are five key improvement areas across the Network Rail station set. The majority of stations need to improve the availability of seating and many also need to better personal security and availability of station staff



## Summary of findings

1

### Overall journey satisfaction falls

- Journey satisfaction falls slightly by 1 % point to 82 %.
- Scotland rises by 5 % points to 90 %; NW&C falls 2 % points to 83 %

2

### The majority of routes are performing above the national average on journey satisfaction

- Journey satisfaction at route level ranges from 74 % to 90 % . 8 out of 13 routes are performing above the national score of 85.9 % .
  - North + East (10 % points to 74 % , West Coast Main South (8 % points to 79 % ) and Wessex (4 % points to 75 % ) are the routes that have significant decreases in journey satisfaction

3

### The key driver of satisfaction remains punctuality of services; for dissatisfaction it's how delays are dealt with

- Punctuality and reliability (-3 % point to 74 % ) of train services, and; on board train cleanliness (up 1 % point to 76 % ) are key in driving passenger satisfaction
  - Satisfaction with punctuality is highest in Scotland at 78 % ; lowest in Southern at 71 %
  - Satisfaction with onboard cleanliness is highest in Wales&Western at 81 % ; lowest in Southern at 73 %
- How delays are dealt with is the key driver of dissatisfaction. It fell 2 % points to 38 %
  - Highest in Scotland at 54 % ; lowest in Southern at 35 % .

## Summary of findings

4

### **Station satisfaction has significantly increased year on year at London Bridge and Victoria – with London Bridge ranked number 1**

- Levels of satisfaction with the station experience differs significantly between stations, with a high of 93.5 % at London Bridge and a low of 63.6 % at Guildford.
- Satisfaction with Charing Cross and Euston has fallen significantly year on year – Guildford has also seen satisfaction fall with an 11 % point reduction.

5

### **Passenger rating for nearly all aspects of station performance have improved at an overall all station level since Spring 2019**

- At an overall level attitudes & helpfulness of staff, availability of staff, toilet facilities, availability of Wi-Fi and seating have seen significant increases in performance.
- Stations are most highly regarded for connections and provision of information about train times/platforms. Performance is weakest for car parking facilities.

6

### **The main drivers of station satisfaction are station upkeep, provision of information and station cleanliness**

- Secondary drivers of overall station satisfaction focus on choice of shops/eating/drinking facilities, personal security and attitudes & helpfulness of staff.
- Car and bicycle parking facilities continue to have the lowest relative impact on station satisfaction.

7

### **Priorities for improvements focus on seating, personal security, staff availability, toilets, and choice of shops/eating/drinking facilities**

- There are five key areas for improvement across stations – areas of high importance, but low satisfaction. 14 out of 20 stations have the availability of seating as a key improvement area, while personal security and availability of staff are also keys areas across multiple stations.

*Thank you*

Any Questions?

[Andrew.regan@networkrail.co.uk](mailto:Andrew.regan@networkrail.co.uk)

[Aimee.fish@networkrail.co.uk](mailto:Aimee.fish@networkrail.co.uk)