Britainthinks
Insight & Strategy

NATIONAL INFRASTRUCTURE COMMISSION

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National Infrastructure Commission (NIC)

Rail Needs Assessment Social Research

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01 Introduction

Background and objectives

- The overall aim of this study is to help the National Infrastructure Commission (NIC) understand public priorities and needs regarding future rail investments in the Midlands and the North. This work will contribute to the Commission's ongoing Rail Needs Assessment, to inform the government's Integrated Rail Plan – which is intended to be drawn up for the Midlands and the North by December 2020
- The research aims to:
  - Identify and understand **what current users value** about the railways
  - Identify the key **barriers to using rail** among non-users
  - Establish the public's **priorities for future rail investment**
  - Explore which factors might **encourage railway use**
  - Explore how priorities change depending on **type** of rail user, location, and other factors

Methodology

Research took place across two main phases:

Phase 1: Quantitative survey	Phase 2: Qualitative focus groups

• Representative, online survey of 3,000 adults aged 18+ living in the Midlands and the North of England
• Data weighted to be regionally representative by age, gender and socio-economic grade (SEG)
• Fieldwork conducted 17th July – 14th August 2020
	• 12 x online focus groups lasting 90 minutes each with residents of the Midlands and North
	• Focus groups split by train usage:
	  • 4 x groups with **rail-users** taking the train at least once a month for short journeys
	  • 2 x groups with **rail-users** taking the train at least once every three months for long journeys
	  • 4 x groups with **non-users** who have taken the train in the past three years
	  • 2 x groups with **non-users** who haven't taken the train in the past three years
	• Fieldwork conducted 10th – 18th August 2020

Respondents to the online survey were recruited from the research panel of Dynata, BritainThinks' quantitative research partner. Dynata uses loyalty panels, partnerships and affiliate networks to recruit respondents, either by open enrollment or by invitation. Each received a small incentive, such as reward points or small cash incentives. More information can be found at http://info.dynata.com/dynata-panel-book.html. Participants in the qualitative focus groups were recruited by BritainThinks' network of freelance recruiters based in communities across the Midlands and North of England. Each received £45 for taking part.

Methodological considerations (1/2)

- There are some considerations to bear in mind when interpreting these findings:
  - Due to the Covid-19 pandemic, all elements of the research were delivered online.
    - The online methodology used for the quantitative survey ensured a representative sample of those living in the Midlands and the North was reached, but excludes those with low levels of digital literacy who could have been reached via a telephone or face-to-face survey methodology.
    - Qualitative recruitment was also unable to take place face-to-face due to the lockdown measures.

- The decision was made to increase the sample size of rail-users, relative to their actual proportion in the UK to ensure data on this group could be reported by region. This does not impact user-group analysis but slightly skews any data reported at total level.

Audience	Proportion of 3,000 sample when reflecting the National Travel Survey	Proportion in this sample
Frequent rail-users	690	1072
Casual rail-users	1140	971
Non-rail users	1170	957

Methodological considerations (2/2)

- Due to rounding conventions, not all figures within the charts sum to exactly 100%. This is denoted by the below on relevant slides:

Due to rounding conventions, the figures on this chart do not add up exactly to 100%

Participants in the quantitative and qualitative phases answered about their use and perceptions of rail from before the Covid-19 lockdown

When asked about priorities for the future, participants were encouraged to answer imagining that rail and transport had 'returned to normal'

Findings therefore reflect reported rail use from before lockdown, and perceptions of future rail elicited under that assumption

Definition of audiences

Our three audiences are defined below. Icons and colours are used throughout to indicate the data reported on			
		Quantitative survey: base size	Audience definition
	Residents of the Midlands and North	n=3,000	All respondents
	Rail-users	n=2,043	
	Frequent rail-users	n=1,072	All who take the train at least once a month for short journeys or long journeys
	Casual rail-users	n=971	All who take the train less than once a month but at least once a year for short journeys and long journeys
	Non-users	n=957	All who take the train less than once a year or never for short journeys and long journeys

Detailed breakdown of quantitative sample achieved

Region	North East and Yorkshire	750
	North West	750
	West Midlands	750
	East Midlands	750
Location type	Urban	1401
	Suburban	1067
	Rural	532
Gender	Male	1468
	Female	1532
SEG	ABC1	1454
	C2DE	1546
Age	18-34	802
	35-54	945
	55-74	900
	75+	353
Employment	Employed (Full Time)	1243
	Employed (Part time)	508
	Unemployed	249
	Student	69
	Retired	382

North East and Yorkshire	Frequent rail users	284
	Casual rail users	234
	Infrequent rail users / non-user	232
North West	Frequent rail users	313
	Casual rail users	237
	Infrequent rail users / non-user	200
West Midlands	Frequent rail users	269
	Casual rail users	242
	Infrequent rail users / non-user	239
East Midlands	Frequent rail users	206
	Casual rail users	259
	Infrequent rail users / non-user	285

Note on the sample representativeness and weighting

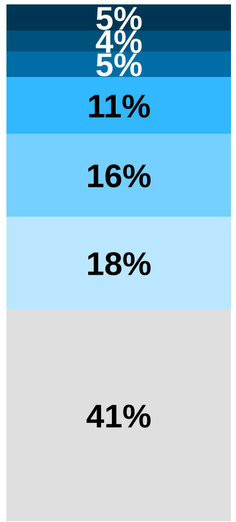
Our sample was designed to be representative of the Midlands and North at a demographic level – with a final weighting applied to the data to achieve the proportions on the right, according to ONS data.

As such the sample is not representative of rail users – as rail users as a group are not representative of the overall population of the Midlands and North (e.g. rail users tend to skew richer and younger).

	Regional quotas	West Midlands	East Midlands	North West	North East (incl. Yorkshire and the Humber)
Gender quotas	Male	367 per region			
	Female	383 per region			
Age quotas	18-34	195	188	195	225
	35-55	248	240	240	218
	55-75	218	233	225	225
	75+	90	90	90	83
SEG quotas	SEG: ABC1	357	369	372	356
	SEG: C2DE	393	381	378	395

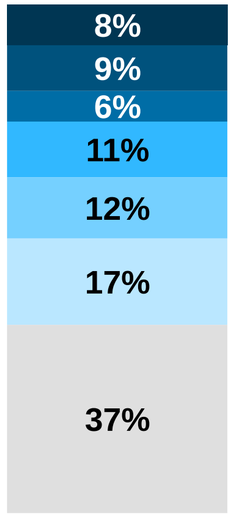
Frequency of rail use and division of rail-users and non-users

Frequency of surface rail travel in England*

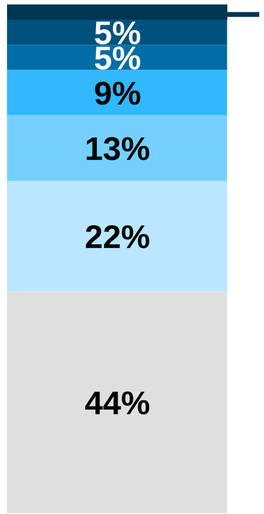


Frequency of train travel among our total sample before the Covid-19 lockdown

Short distances (less than 50 miles)

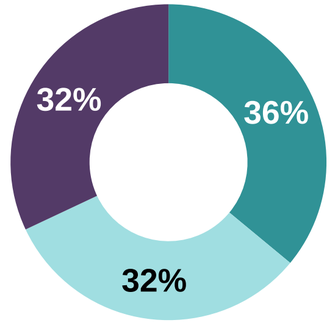


Long distances (more than 50 miles)



- 3 or more times a week
- Less than once a week, more than once or twice a month
- Less than once a month, more than once or twice a year
- Less than once a year or never
- Once or twice a week
- Once or twice a month
- Once or twice a year

% of total sample counting as rail-users and non-users



- Frequent rail users
- Casual rail users
- Non-users

D5. Before the Covid-19 lockdown began, how often did you use trains to travel short distances (less than 50 miles)? All respondents (n=3,000)
D6. Before the Covid-19 lockdown began, how often did you use trains to travel long distances (50 miles or more)? All respondents (n=3,000)

*Data from the National Travel Survey – How frequently do you use the following modes of transport? (n=15,938)

02 Executive summary

Key findings

1 **Speed and convenience are the strongest reported determinants of rail use**

- Speed and convenience are linked: rail is seen as the fastest option when the journey is simple – i.e. direct and easy to get to the station. Rail-users are more likely to live and work within walking distance of rail stations.

2 **Non-users, however, do not see rail as fast or convenient in comparison with the alternatives**

- Where rail does not offer a simple route, it is considered slow, inconvenient, and expensive.
- Many non-users also have a strong preference for their car.

3 **On balance, residents of the North and Midlands are fairly satisfied with their rail service**

- Rail-users are more likely to be satisfied than dissatisfied with most aspects of rail apart from cost. They are more likely to be positive about speed, connectivity and capacity, but report lower satisfaction with reliability, level of improvements and cost.
- There is 'room for improvement' however – relatively high proportions of rail-users express a neutral view.
- It is also worth noting that they are relatively less satisfied than other regions of the UK, particularly in terms of reliability, levels of crowding, connections with other transport and the availability of staff.

4 **There is a clear preference for improvements to rail capacity**

- All respondents expressed a clear overall preference to improve seat availability and reduce crowding – however, this improvement is unlikely to prompt non-users to start using the train.
- Non-users are more likely than users to express a preference for improved connectivity, including having a station close to their home.

Source: National Rail Passenger Survey, Transport Focus 2020
% saying satisfied or good for rail operators for following aspects: Reliability (East Midlands 73%, West Midlands 64%, Northern 63% vs. national average of 74%), Level of crowding (East Mid 66%, West Mid 65%, Northern 72% vs. national av. 73%), Connections with other transport (East Mid: 78%, West Mid 74%, Northern 69% vs national av. 80%), Availability of staff (East Mid 76%, West Mid 64%, Northern 64% vs national av. 71%),

Key findings (cont.)

5 **Respondents prioritise the minimisation of disruption for improvement works over completing work quickly**

- The possibility of work taking place at night is well-received, with many saying that there are few night trains in the regions.
- There is also widespread cynicism that rail improvement works are ever completed on time, leading to scepticism about rapid delivery schedules.

6 **Specific rail improvements with tangible outcomes are sought out as justifications for disruption, rather than arguments related to regional growth**

- Specific benefits such as increasing the destinations you can reach by rail are seen as good justifications for disruption.
- Whereas arguments relating to ‘boosting local economies’ are met with confusion and run the risk of being seen as overpromising.

Implications

Increasing capacity – particularly space on trains and overall reliability of services – is the clear preference for rail improvements among all rail users. However, this does not address the chief barriers to rail use among non-users.

- Rail-users feel they already have fairly good connectivity. Their preference for capacity is to improve their experience on train services (i.e. better guarantee of a seat, fewer delays and cancellations)
- The chief barriers to rail use among non-users relate to connectivity – their homes and destinations are not close to stations and so they do not see rail as fast. However, these are less likely to be stated priorities for future investment due to scepticism about feasibility
- While increasing capacity may encourage rail-users to take the train more often, therefore, improving connectivity is most likely to grow the proportion of those who use rail
- Further, the existence of a significant portion of non-users who already live close to a station (i.e. a fifth live within a 15-minute walk) points to interventions that look solely at improving rail connectivity or capacity alone are not enough, but that these would need to sit alongside wider improvements that are beyond the scope of this project (e.g. around expense of train vs. car, expense and availability of parking, broader emotional and motivational barriers to rail and often deep-seated preference for car) to effect modal shift.

Cynicism about the value and delivery of rail improvements means that people want to hear about tangible and measurable benefits

- There is a need to ‘show rather than tell’ people the benefits of rail improvements by describing the specific impacts that improvements will have on journeys
- Language relating to ‘boosting local economies’ and ‘regional growth’ is confusing and feels harder to evidence
- Current levels of service means that most are amenable to longer periods of disruption as long as disruption is minimal

03 Context

Residents of the Midlands and the North are more likely to be satisfied than dissatisfied with most aspects of rail

- There are **reasonably high** levels of satisfaction about most elements of rail
  - Almost half (48%) of respondents are satisfied with speed
  - Cost is the only aspect in which people are more likely to be dissatisfied than satisfied
  - Geographically, participants in the East Midlands are less likely to be satisfied with the elements of rail compared to other regions in the Midlands and North of England
  - When comparing between frequent and casual users, levels of satisfaction only differ significantly when evaluating cost and levels of improvements, where frequent users are more satisfied
- In most cases, however, the proportion expressing a **neutral or uncertain opinion is at least as high** as the proportion actively satisfied suggesting there is 'room for improvement'
- In the focus groups there was a sense that rail is adequate in the Midlands and the North, but that services in the South are significantly better and receive more investment*

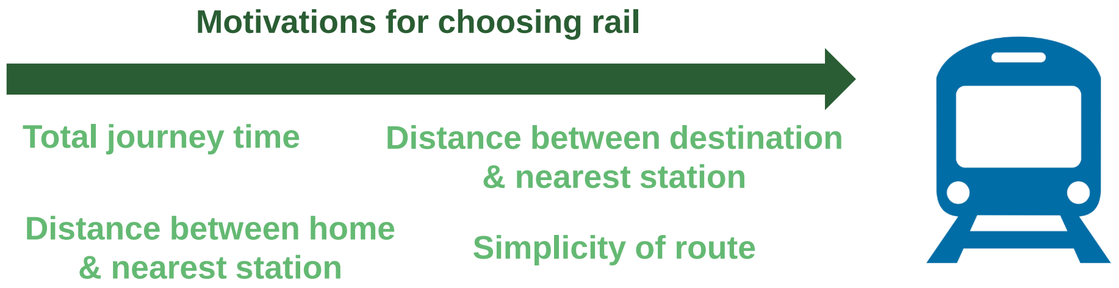
Element of rail	NET: Satisfied	Neutral + don't know	NET: Dissatisfied
Speed of trains	**48%**	**43%**	**9%**
How well your train routes served your key travel destinations	**44%**	**43%**	**13%**
How often your trains ran	**43%**	**44%**	**13%**
How easy it was to catch the trains you wanted to	**42%**	**44%**	**14%**
Reliability	**37%**	**45%**	**18%**
Level of improvements to services you use	**30%**	**54%**	**16%**
Cost of train travel	**27%**	**42%**	**31%**

R1. Before the Covid-19 lockdown began, how satisfied were you with each of the following elements of rail? All (n=3,000)

Data from the National Rail Passenger Survey, Transport Focus 2020 also shows that those based in the Midlands and North are less satisfised with certain elements of rail than other regions in the UK, particularly reliability, levels of crowding, connections with other transport and the availability of staff.

Qualitatively, rail-users' primary considerations are linked to the practicality of their personal journeys

- Rail use is motivated chiefly by practical considerations
  - There is rarely a strong preference for rail
  - People tend to use rail 'if it makes sense' for them – if it offers a quick and simple route



- Rail-users primarily think about rail in relation to their individual, usual journeys
  - Rail-users' perceptions are informed by how frequently they take the train, whether they do so at peak times or not and/or whether they use rail for commuting or leisure
  - Therefore their priorities for rail improvements and views on how these should be delivered are also tied to individual experiences and what the impact would be on their personal journeys

Some participants in the qualitative phase were cynical about rail improvement projects, often connected to negative perceptions of HS2

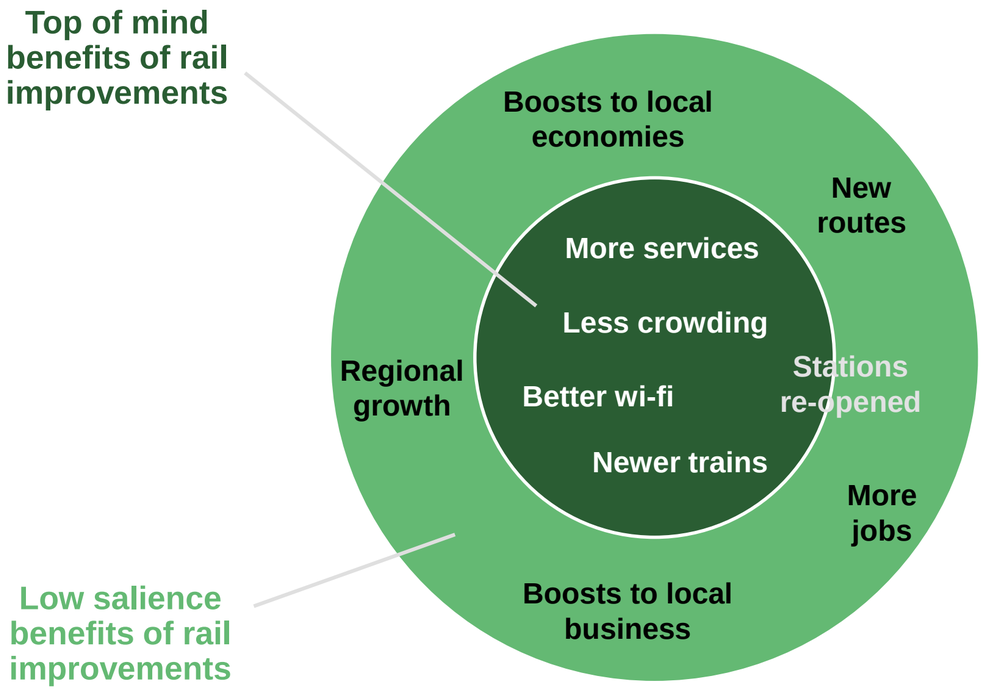
- There is a somewhat cynical starting point when discussing improvements to rail, stemming from:
  - High-profile projects being delayed and over budget (HS2)
  - Extensive station closures under Beeching Review (among older participants)
  - Perceived historical underinvestment in infrastructure in the regions
  - A sense that politicians overpromise and underdeliver
- Meaning that there is scepticism about:
  - Whether promises will be kept
  - Predicted time taken for improvement works, with many assuming these will overrun
  - Some of the purported benefits, with wariness about ‘overselling’ the benefits of rail improvements

“This is the cynical side of my personality coming out… great if it happens. But we have a lot of false promises about mode of transport and improvement. I’m thinking of smart motorways and improving your journeys, but it causes more chaos than anything else. It’s easy to [say], but whether they deliver is another matter.”

(Non-user, North)

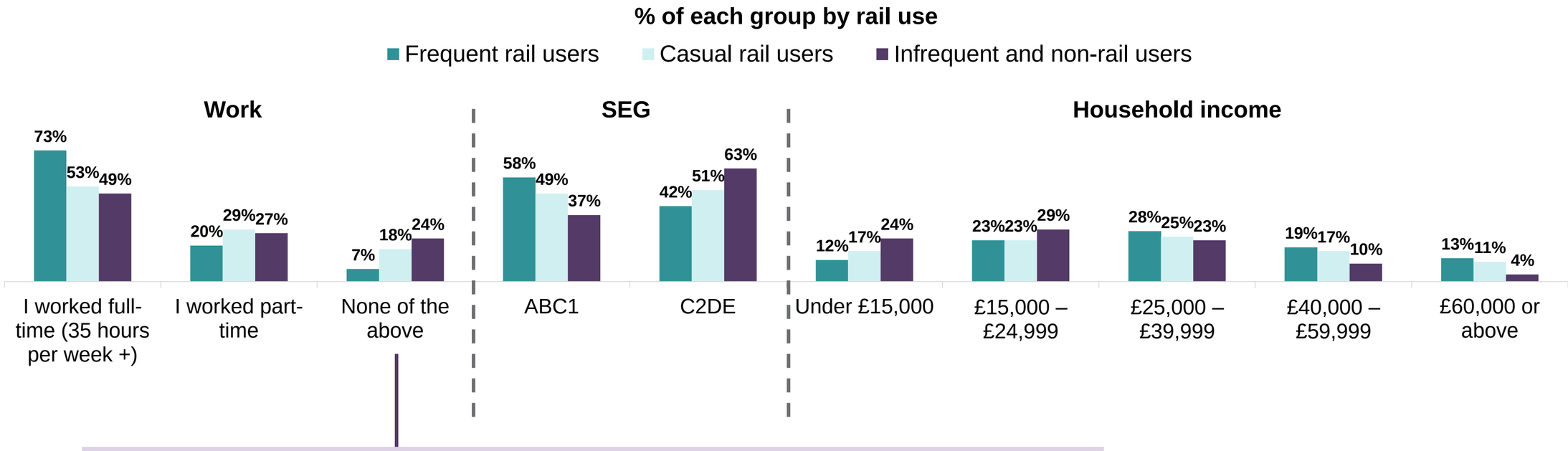
Qualitatively, passengers judge improvements according to whether they would directly impact their journeys

- The benefits of rail improvements for passengers are more salient than the wider social and/or economic benefits
- Smaller, more tangible changes are easier to visualise than infrastructural changes
  - And feel more achievable and realistic in the context of scepticism
- There is less interest in second-order impacts such as the impact on the region or local economy
  - These are not intuitive or immediately obvious – even once prompted
  - They are harder to measure/prove – people don't always see the benefits
  - And there is some suspicion that this may be overstating the influence of rail



04 Rail use in the Midlands and North

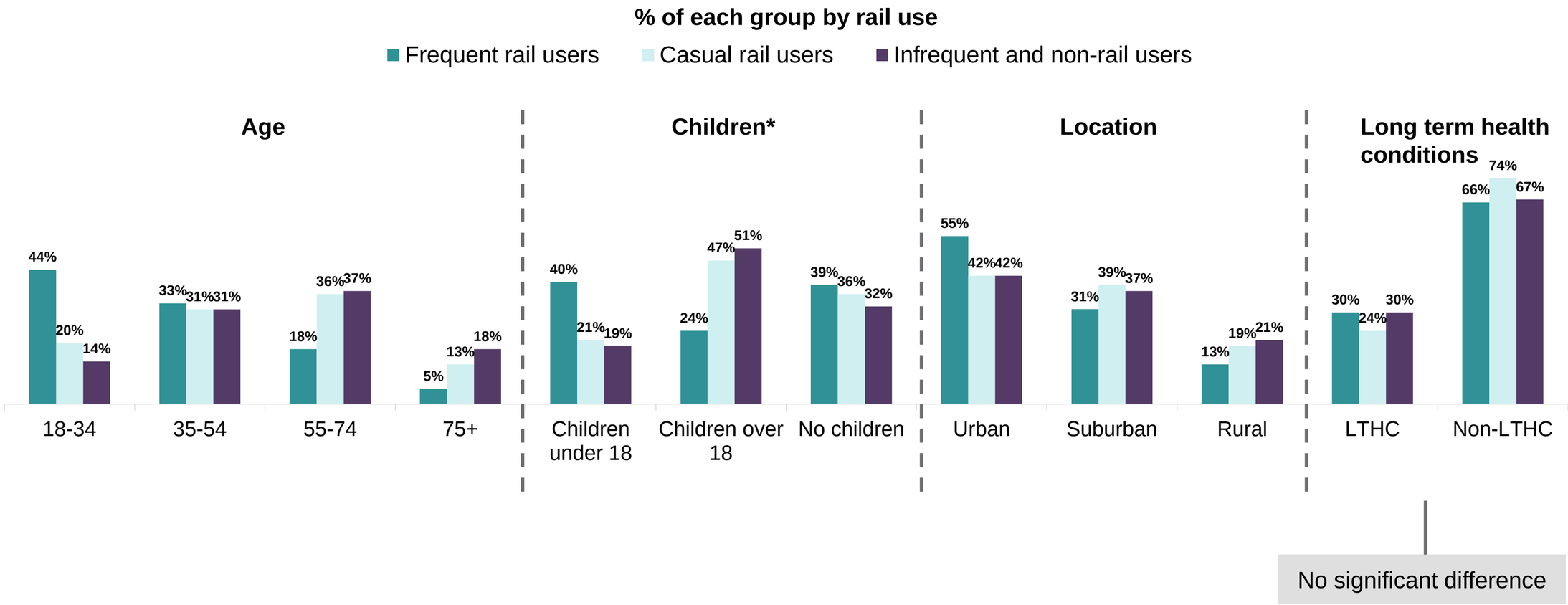
There is a link between rail use and affluence. Rail-users are more likely to be in full-time work, ABC1 and have higher incomes



Non-users are more likely than users to be retired and living on a state pension (**21%** vs 9%) and unemployed or not working due to long-term sickness (**12%** vs 6%)

D5. Before the Covid-19 lockdown began, how often did you use trains to travel short distances (less than 50 miles)? All respondents (n=3,000)
D6. Before the Covid-19 lockdown began, how often did you use trains to travel long distances (50 miles or more)? All respondents (n=3,000)

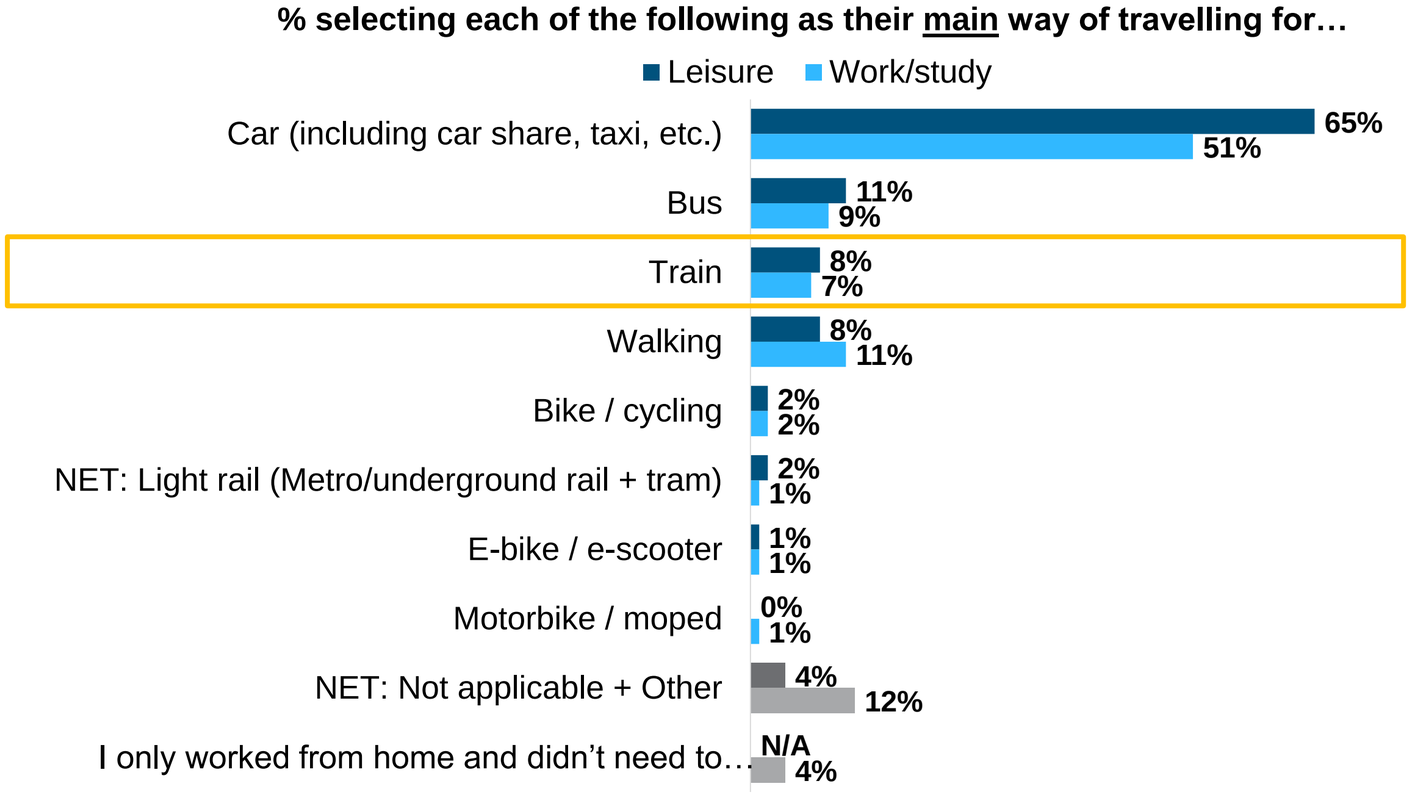
Rail-users are also more likely to be younger, have children under 18 and live in urban areas



D5. Before the Covid-19 lockdown began, how often did you use trains to travel short distances (less than 50 miles)? All respondents (n=3,000)
D6. Before the Covid-19 lockdown began, how often did you use trains to travel long distances (50 miles or more)? All respondents (n=3,000)

*Percentages add up to over 100% as respondents were able to select more than one option regarding the children's age

Only a small minority of residents in the North and Midlands say the train is their main mode of transport – including among rail-users

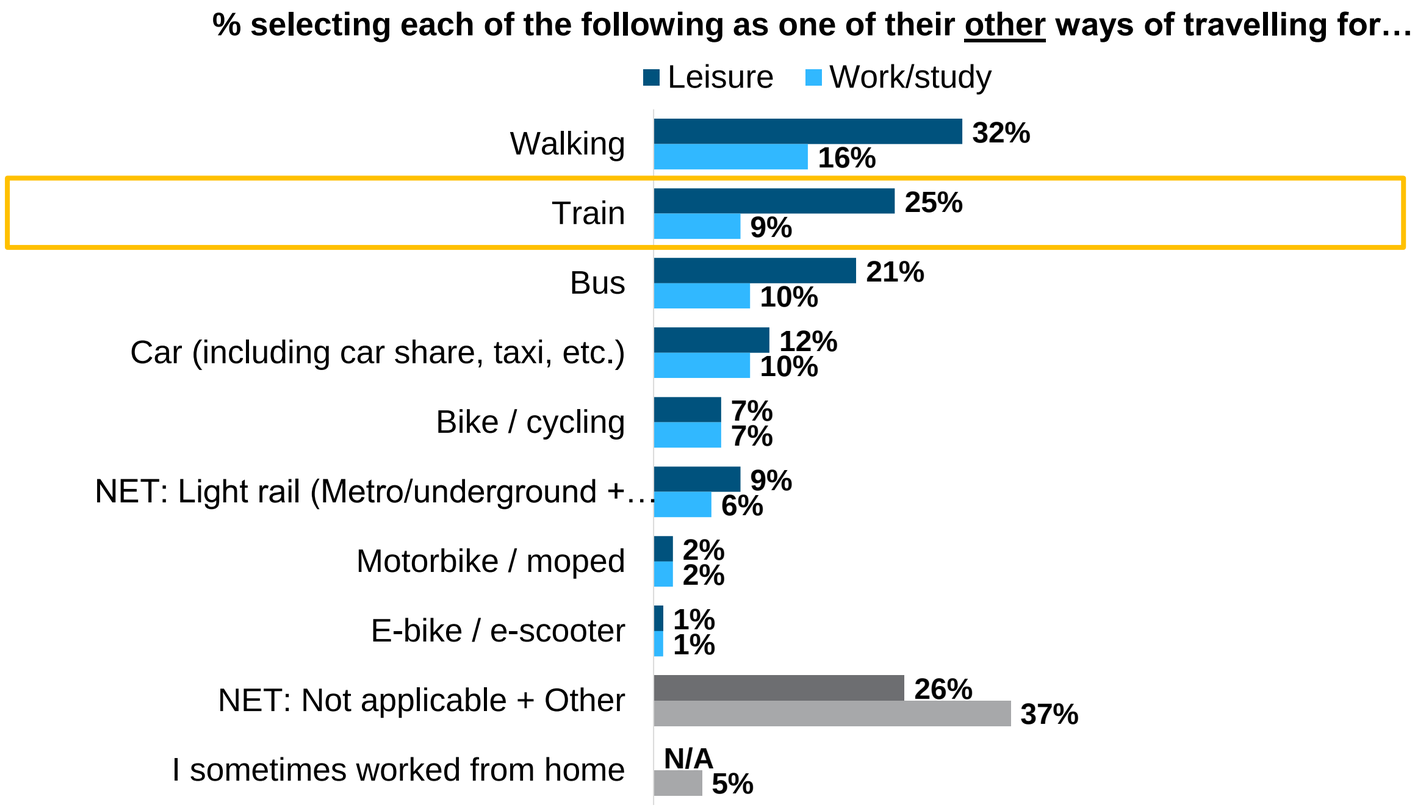


Even rail-users are unlikely to select the train as their main mode of transport

- Only **12%** say the train is the main way they travel for leisure and **9%** for work/study
- Among those who commute by train at least once a week, **29%** say that rail is their main way of traveling for work

D14. Before the covid-19 lockdown began, please select the main way you travelled for leisure (e.g. day trips, shopping, entertainment, visiting friends or family) within the UK. All respondents (n=3000)
D13. Before the covid-19 lockdown began, please select the main way you travelled to work/study (if applicable)? All respondents in employment or education (n=2128)

Rail is instead seen as an alternative travel option, with a quarter (25%) saying it is one of the other ways they travel for leisure



Rail-users are more likely to see the train as an alternative mode of transport for leisure travel than for work

- Over a third (**36%**) of rail-users consider the train one of the other ways they travel for leisure, compared to **12%** who see it as one of the other ways they travel for work/study

Those who travel to work by car are less likely to consider other options

- Around a half (**54%**) of those selecting car as their main way of travelling for work select ‘not applicable’ for other ways of traveling

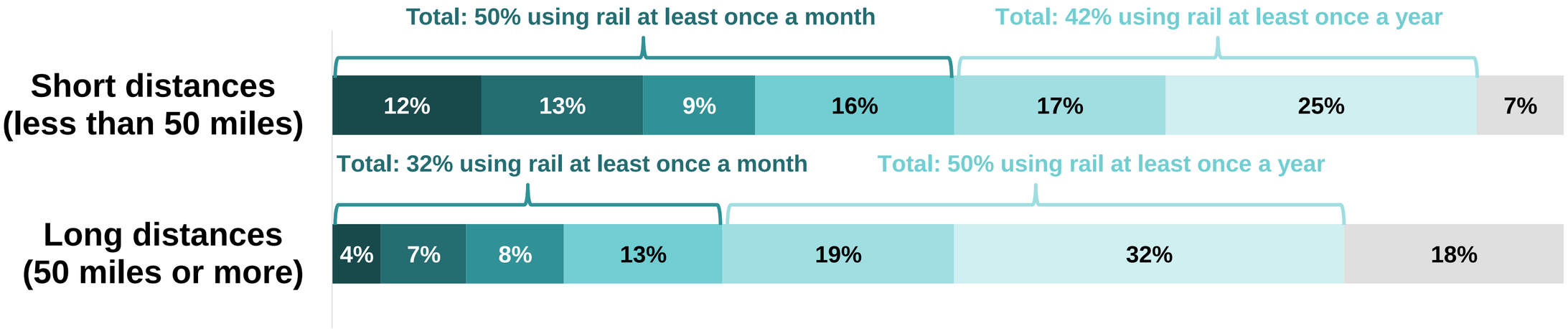
D14. Before the covid-19 lockdown began, please select the main way you travelled for leisure (e.g. day trips, shopping, entertainment, visiting friends or family) within the UK. All respondents (n=3000)
D13. Before the covid-19 lockdown began, please select the main way you travelled to work/study (if applicable)? All respondents in employment or education (n=2128)

Among rail-users, short distances are more common than long – half (50%) take a short journey at least once a month, compared to a third (32%) who take a long journey at least once a month

Frequency of train travel before the covid-19 lockdown
– all rail-users

- 3 or more times a week
- Less than once a week, more than once or twice a month
- Less than once a month, more than once or twice a year
- Less than once a year or never
- Once or twice a week
- Once or twice a month
- Once or twice a year

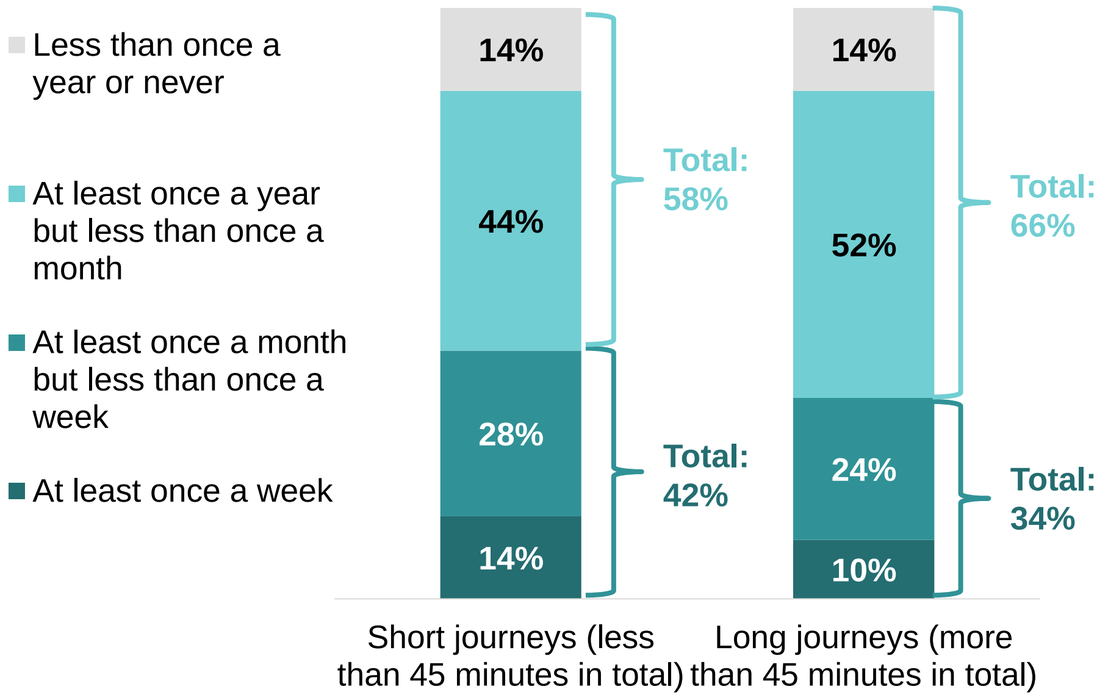
Respondents count as rail-users if they use rail for either short distances or long distances once a year or more. This means that almost 1 in 5 rail-users (**18%**) use rail for short distances at least once a year, but rarely if ever use rail for long distances



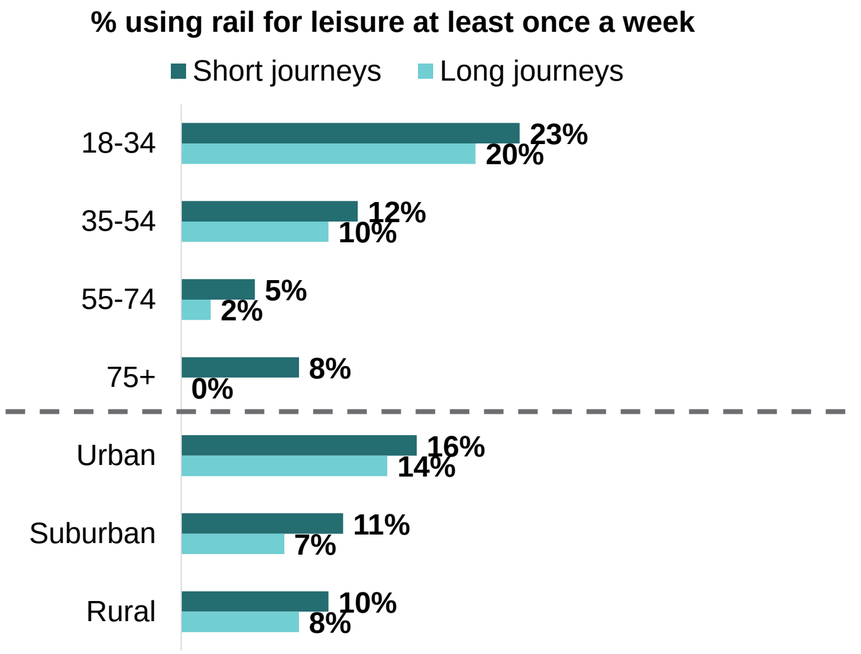
D5. Before the Covid-19 lockdown began, how often did you use trains to travel short distances (less than 50 miles)? All respondents (n=3,000)
D6. Before the Covid-19 lockdown began, how often did you use trains to travel long distances (50 miles or more)? All respondents (n=3,000)

Due to rounding conventions, the figures on this chart do not add up exactly to 100%

Almost all rail-users take the train for leisure once a year or more, with younger and urban-based rail-users doing so more frequently



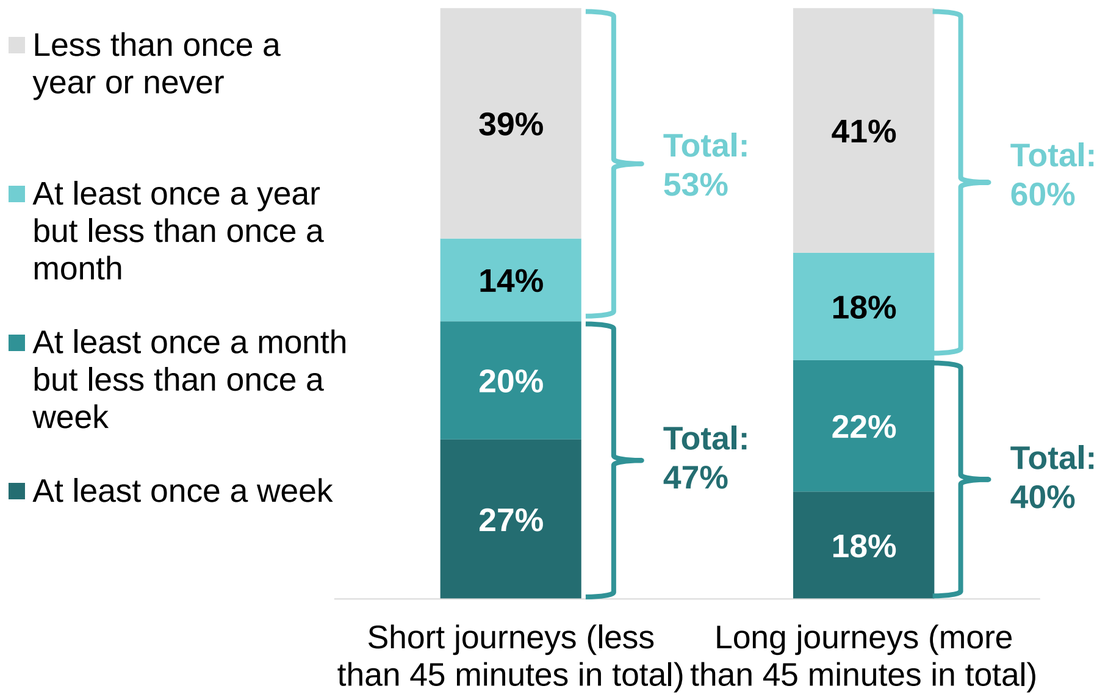
Younger rail-users and those in urban/suburban areas are more likely to use trains frequently for leisure travel. There are no major differences by region



R2. Before the Covid-19 lockdown began, how often did you use trains to make short journeys (less than 45 minutes in total) for leisure (e.g. days out, visiting friends/family, entertainment)? All respondents who use trains to travel short distances at least once a year (n=1,892)
R4. Before the Covid-19 lockdown began, how often did you use trains to make long journeys (more than 45 minutes in total) for leisure (e.g. days out, visiting friends/family, entertainment)? All respondents who use trains to travel long distances at least once a year (n=1,684)

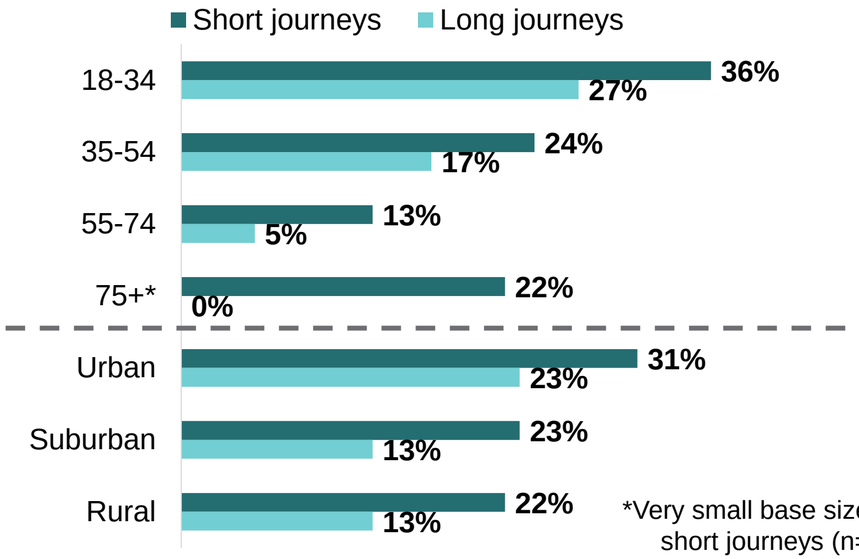
Though more rail-users use the train weekly to commute than for leisure, around 4 in 10 rail-users never commute by train

Frequency of rail use for <u>commuting for work/study</u>



Younger and urban-based rail-users are more likely to commute by train frequently. For short journeys, **men** are more likely than women to commute at least once a week (30% vs. 25%), as are those in the **North West** (33%) than those in North East & York (24%) and the East Midlands (25%)

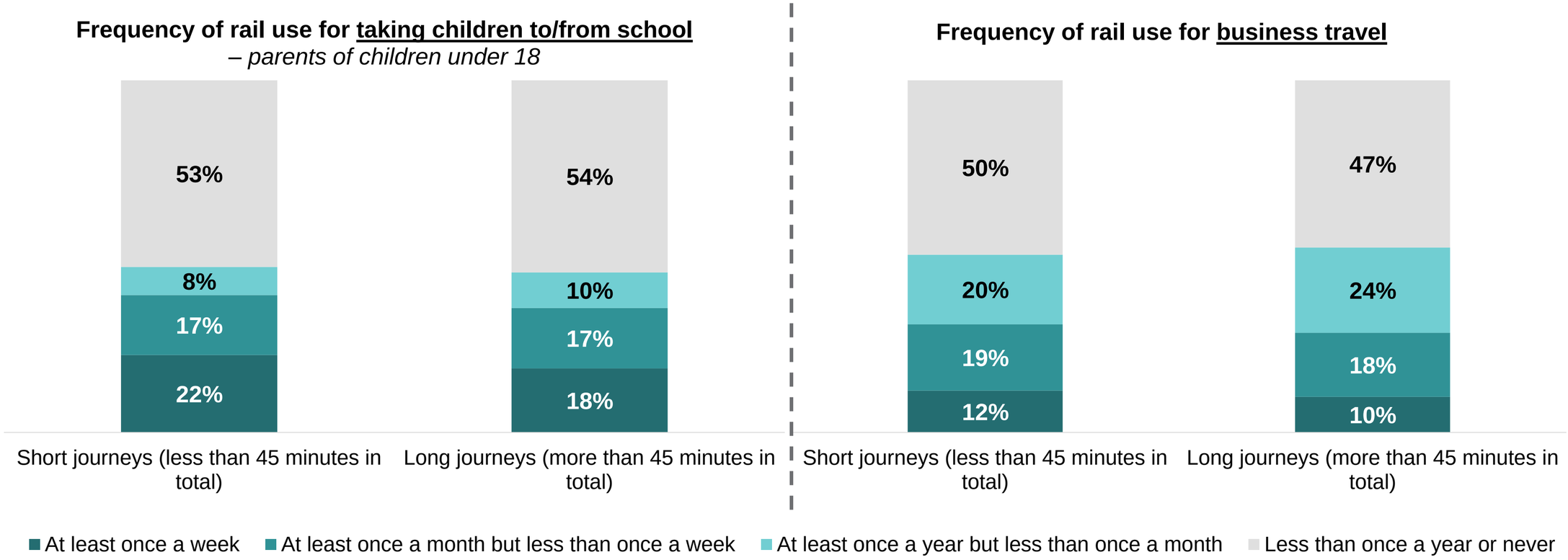
% using rail for commuting at least once a week



*Very small base size for short journeys (n=28)

R2. Before the Covid-19 lockdown began, how often did you use trains to make short journeys (less than 45 minutes in total) for commuting for work/study? All participants who travelled to work/place of study and use trains to travel short distances at least once a year (n=1,298)
R4. Before the Covid-19 lockdown began, how often did you use trains to make short journeys (less than 45 minutes in total) for commuting for work/study? All participants who travelled to work/place of study and use trains to travel long distances at least once a year (n=1,195)

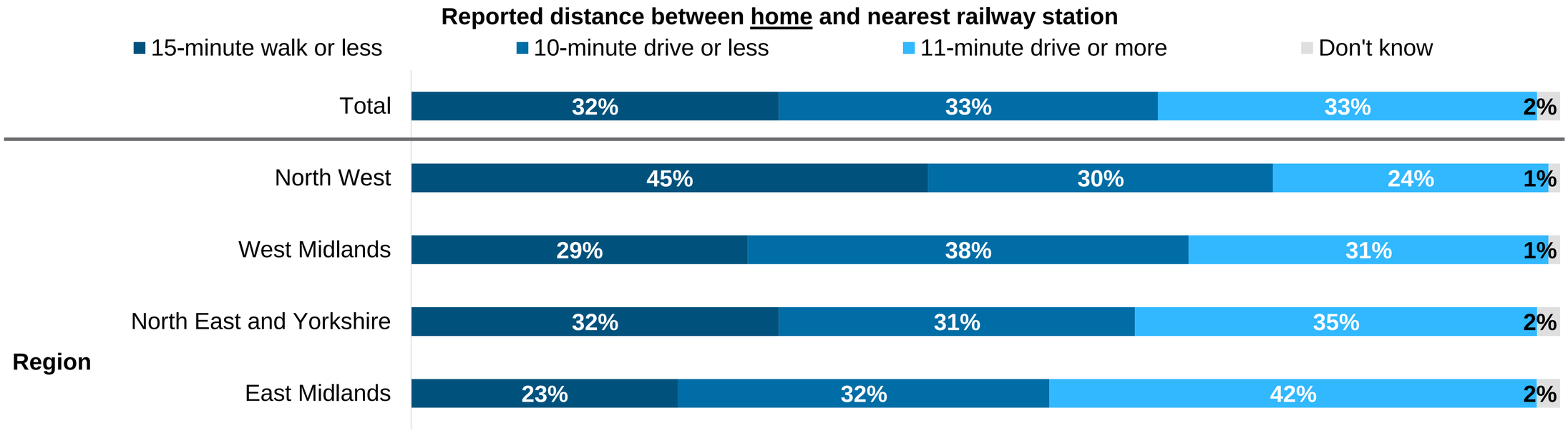
Around half of rail-users rarely if ever use the train for the school run or business travel



R2. Before the Covid-19 lockdown began, how often did you use trains to make short journeys (less than 45 minutes in total) for taking children to/from school? All respondents who have children at school and use trains to travel short distances at least once a year (n=548)
R4. Before the Covid-19 lockdown began, how often did you use trains to make long journeys (more than 45 minutes in total) for taking children to/from school? All respondents who have children at school and use trains to travel long distances at least once a year (n=548)

R2. Before the Covid-19 lockdown began, how often did you use trains to make short journeys (less than 45 minutes in total) for business travel? All participants who travelled to work and use trains to travel short distances at least once a year (n=1,432)
R4. Before the Covid-19 lockdown began, how often did you use trains to make long journeys (more than 45 minutes in total) for business travel? All participants who travelled to work and use trains to travel long distances at least once a year (n=1,313)

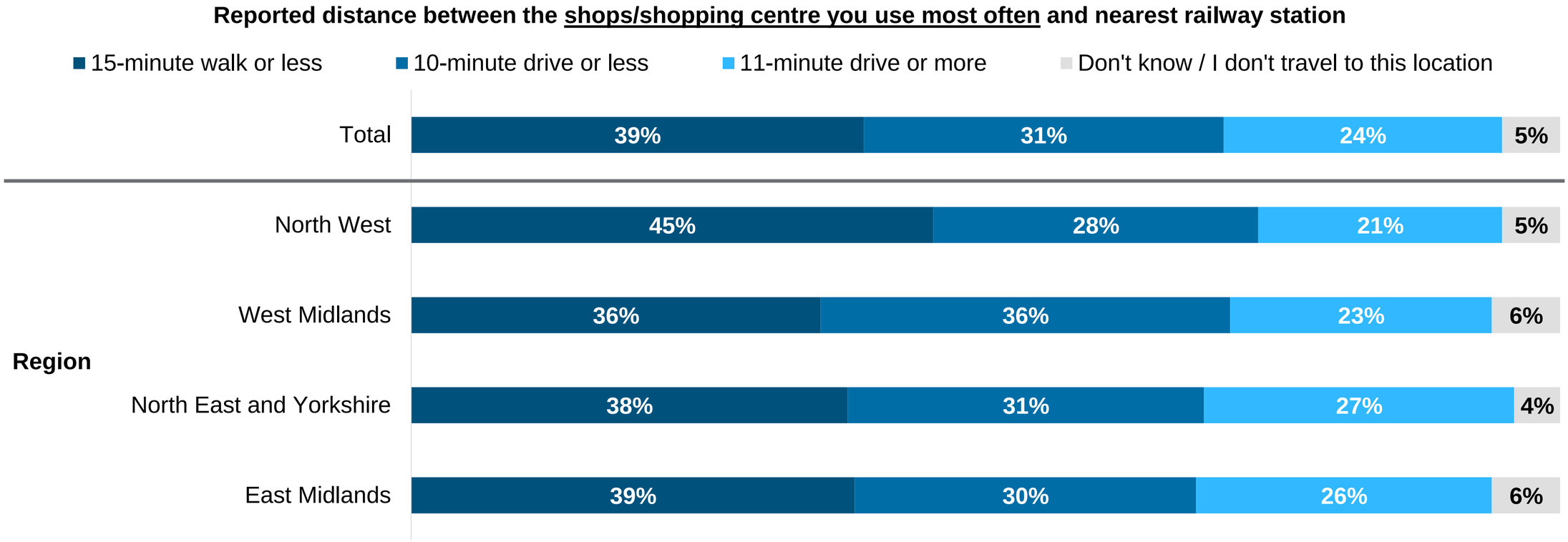
Around a third (32%) of people living in the North and Midlands live within walking distance of a train station, with residents of the North West most likely to live in close proximity



22% of infrequent / non-rail users live withing a 15-minute walk or less from their nearest railway station. This is significantly lower than the proportion of users (37%) but still represents over a fifth of this audience.

D12. How close do you live to the nearest railway station (this could be on local or national lines)? All respondents (n=3,000)

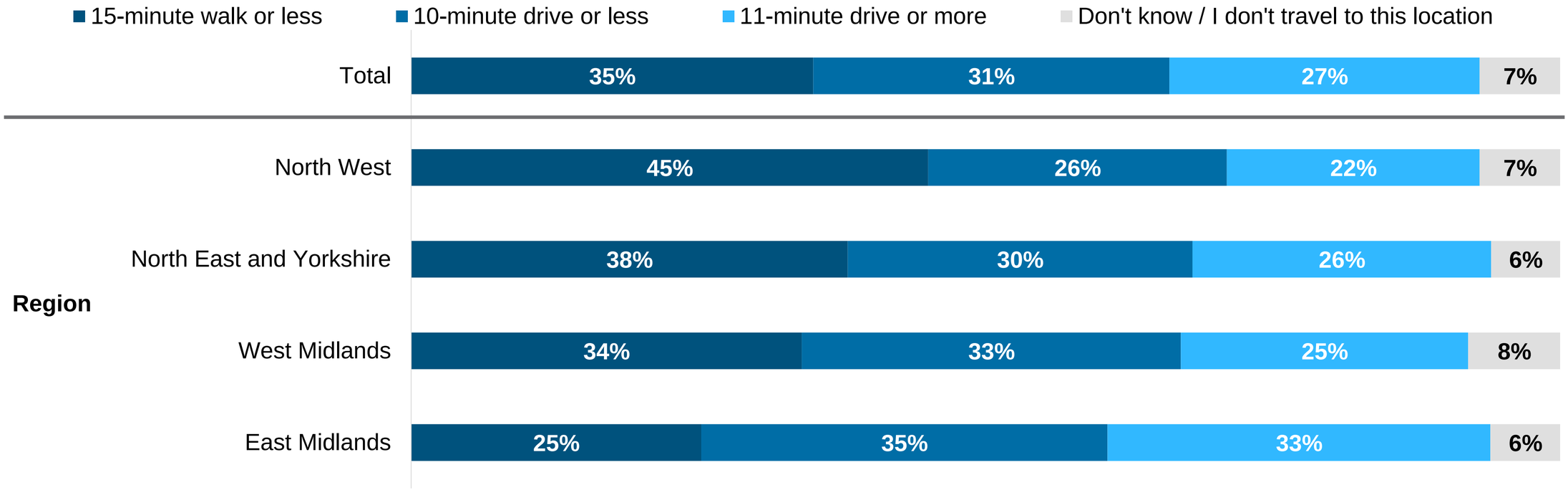
Almost 2 in 5 report that the shops they use most often are within walking distance of a train station, rising to 45% of those in the North West



D15. How close is the nearest railway station to the shopping centre/shops you use most often? All respondents (n=3,000)

Over a third (35%) of those in employment have a station within a 15-minute walk of their workplace – meaning workplaces are slightly less likely to be close to a station than shops

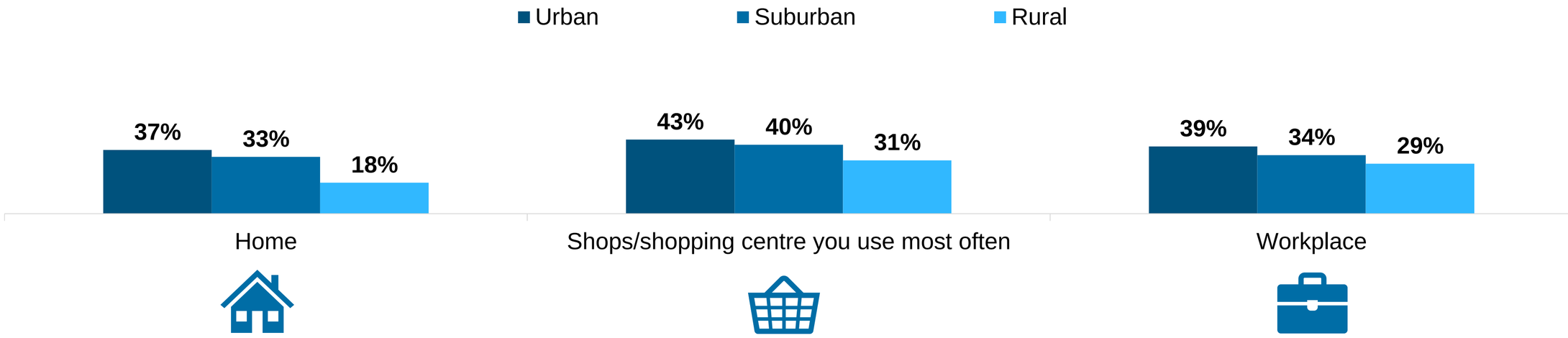
Reported distance between your workplace (pre-Covid-19 lockdown) and nearest railway station
– all those in employment



D15. How close is the nearest railway station to your workplace (pre-Covid19 lockdown)? All participants who travelled to work (n=1,779)

Only 1 in 5 rural residents (18%) live within a 15-minute walk of their nearest station – but their shops and workplaces are more likely to be close to a rail station

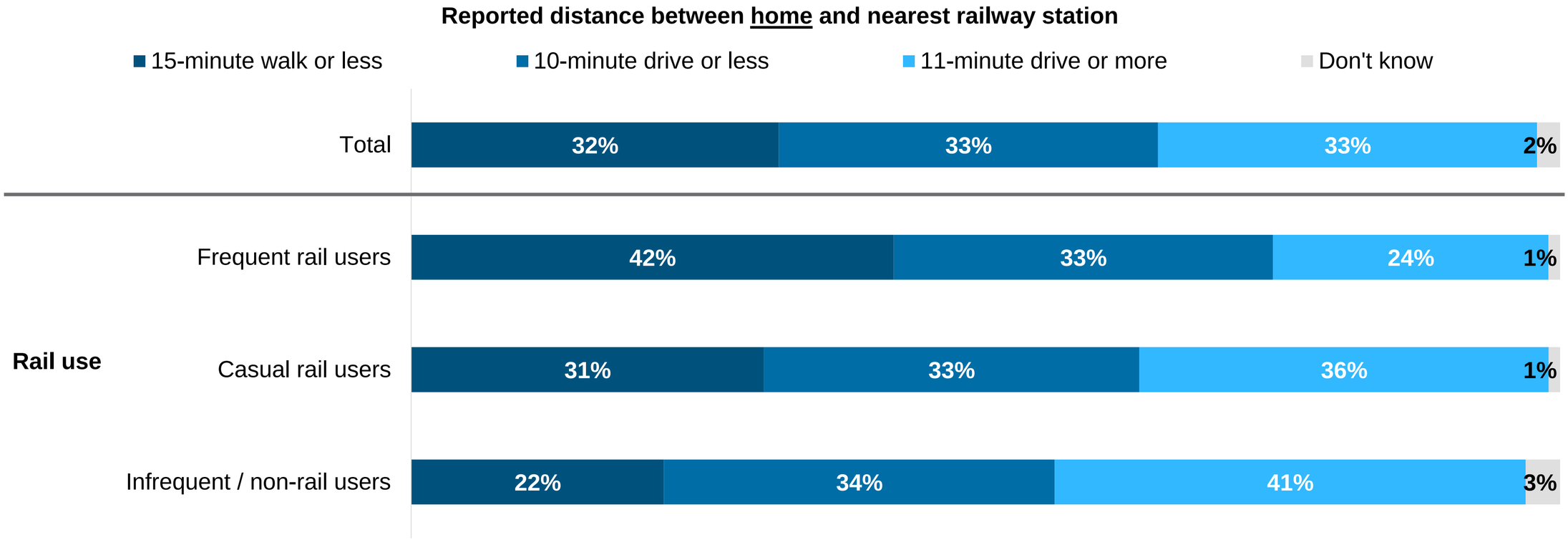
Reported distance between each of the following and nearest railway station
– % answering 15-minute walk or less



There is no statistically significant difference between the proportion of suburban and rural residents living within a 15-minute walk of their workplace

D12. How close do you live to the nearest railway station (this could be on local or national lines)? All respondents (n=3,000)
D15. How close is the nearest railway station to your workplace (pre-Covid19 lockdown)? All participants who travelled to work (n=1,779)
D15. How close is the nearest railway station to the shopping centre/shops you use most often? All respondents (n=3,000)

Over four in ten (42%) of frequent rail users live withing a 15-minute walk of their nearest railway station, compared to 22% of infrequent / non-rail users



D12. How close do you live to the nearest railway station (this could be on local or national lines)? All respondents (n=3,000)

Summary of rail use in the North and Midlands

Rail use and affluence	• Rail-users are more likely than non-users to be in full-time work, ABC1 socio-economic grades, and have household incomes of over £25,000 • Rail-users are also more likely to be younger and live in urban areas
Rail as an alternative mode of transport	• Only a small minority see the train as their main mode of transport – 8% for leisure travel and 7% for work/study. Even rail-users are unlikely to see the train as their main mode of transport • Instead, rail is seen as an alternative travel option, with 25% of residents of the North and Midlands saying it is one of the other ways they travel for leisure
Leisure and commuting	• Almost all rail-users take the train for leisure once a year at least – 86% do so for short journeys and for long journeys • Commuting is less common. Around 4 in 10 rail-users rarely or never commute by train, but 27% commute over short journeys at least once a week
Proximity to rail stations	• Around a third (32%) of people living in the Midlands and North live within a 15-minute walk of a train station • The North West is best served by railway stations – people living in the North West are more likely than all other regions to have a station within walking distance of their home, shops and workplaces

05 What influences and motivates rail use

Speed, convenience (i.e. proximity to station) and comfort are the strongest reported determinants of rail use

Speed

- Speed is most likely to be cited as the reason for using rail
- This is true for commuting and leisure, short-distance travel and long-distance travel

Convenience

- Rail use is dependent on your individual situation, whether you live close to the station and whether your end destination is easily reached
- This in turn influences whether that particular journey is fastest by rail
- This is particularly important for commuting

Comfort

- Trains being a comfortable/relaxing/ enjoyable way of traveling is also important
- This is particularly true for long-distance leisure travel, where comfort is second only to speed
- But it is less important for short-distance commuting

Other

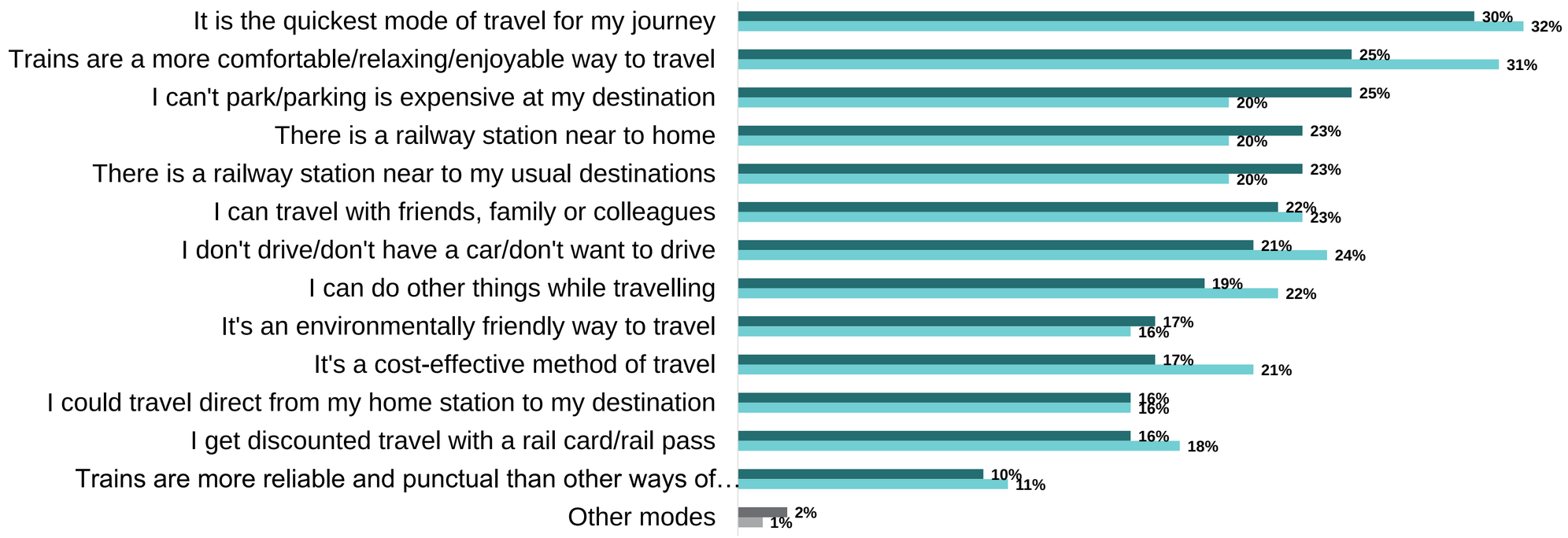
- Cost, the environment, the ability to travel direct and reliability are less likely to be selected as reasons motivating rail use
- Qualitative evidence in addition to their low rankings in the survey suggests that rail is not seen as cost-effective or reliable

Important factors; in order of importance from left to right

Relatively less important

Rail-users are most likely to cite journey speed as their reason for using the train for leisure travel, with comfort also important

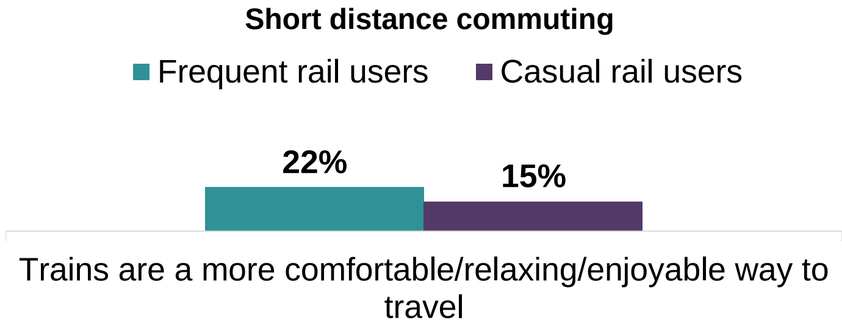
Reasons given for using the train for leisure
– all rail-users using the train for this purpose at least once a year

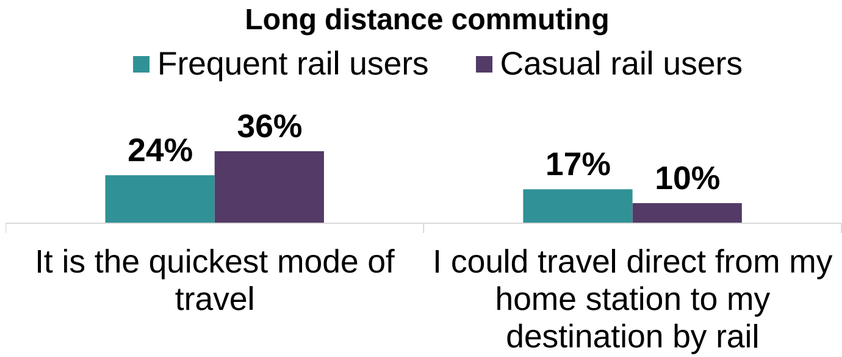


R3. Why did you use the railway for short distance travel – Leisure (e.g. days out, visiting friends/family, entertainment)? All who use trains to travel short distances at least once a year for leisure (n=1,630)
R5. Why did you use the railway for long distance travel – Leisure (e.g. days out, visiting friends/family, entertainment)? All who use trains to travel long distances at least once a year for leisure (n=1,454)

Differences in reasons for using rail for commuting amongst frequent rail users and casual rail users become more prevalent in longer journeys

- When comparing the reasons for using the train for commuting short distances, there are very few differences between frequent rail users and casual rail users
  - Frequent rail users are more likely to highlight comfort as a reason for using rail for short distance commuting
- The difference in reasons for using rail become more prevalent in long distance commuting with casual users more likely to say that speed is a key reason for using rail, compared to frequent users who highlight direct journeys

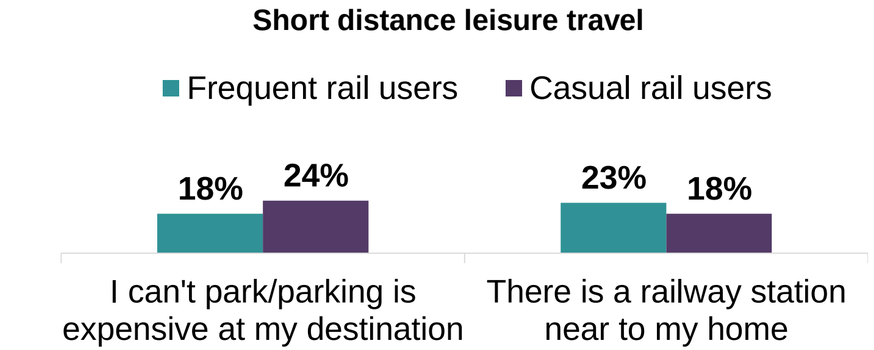


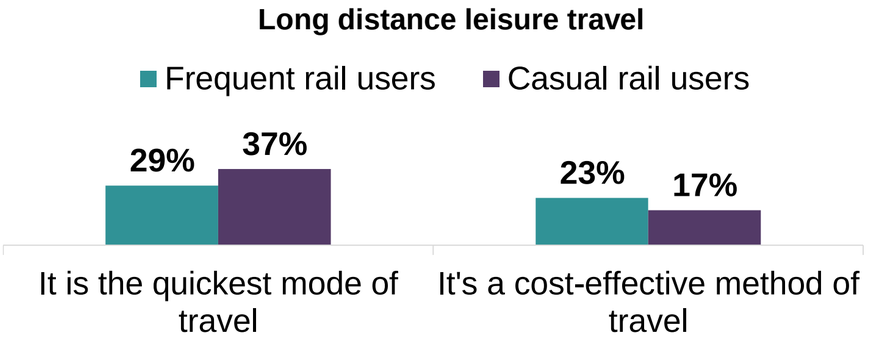


R3. Why did you use the railway for short distance travel – Commuting for work/study? All who use trains to travel short distances at least once a year for work/study (n=796)
R5. Why did you use the railway for long distance travel – Commuting for work/study? All who use trains to travel long distances at least once a year for work/study (n=703)

Frequent rail users are more likely to select cost and convenience for using rail for leisure travel, compared casual rail users who are more likely to select parking issues and speed

- When looking at short distance leisure travel, casual rail users select parking more often as a reason for using rail, compared to frequent users who value the station proximity to home as a reason for using rail for short distance leisure travel
- There are significant differences amongst casual rail users and frequent rail users regarding reasons for using rail for longer distance rail journeys for leisure
  - Casual rail users are more likely to select speed and comfort
  - Frequent rail users are more likely to select cost and proximity



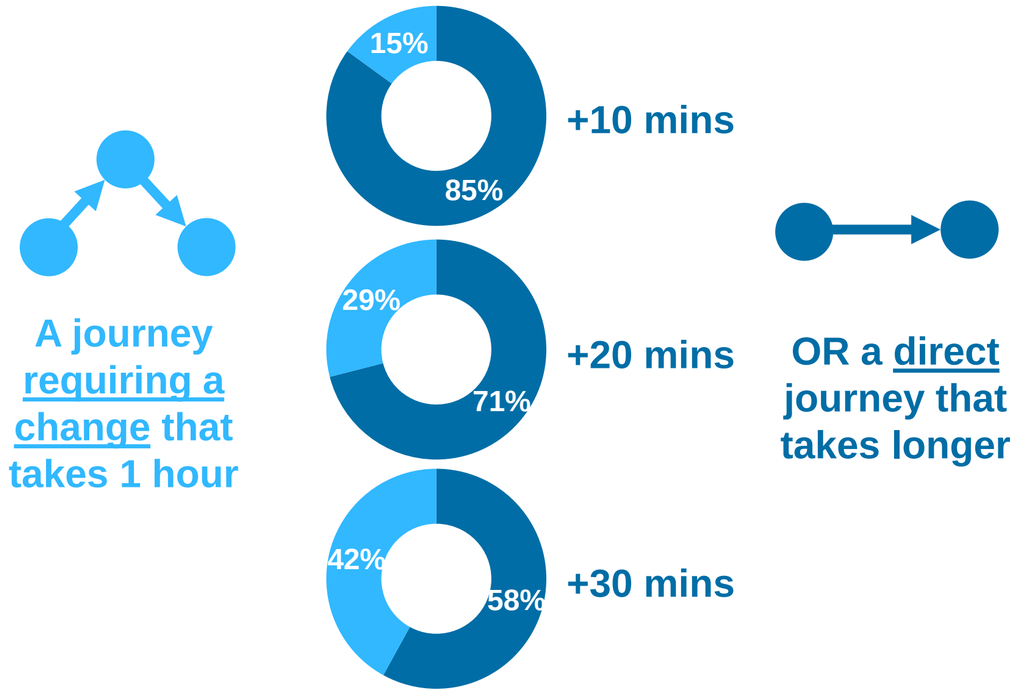


R3. Why did you use the railway for short distance travel – Leisure (e.g. days out, visiting friends/family, entertainment)? All who use trains to travel short distances at least once a year for leisure (n=1,630)
R5. Why did you use the railway for long distance travel – Leisure (e.g. days out, visiting friends/family, entertainment)? All who use trains to travel long distances at least once a year for leisure (n=1,454)

Speed and convenience are closely linked

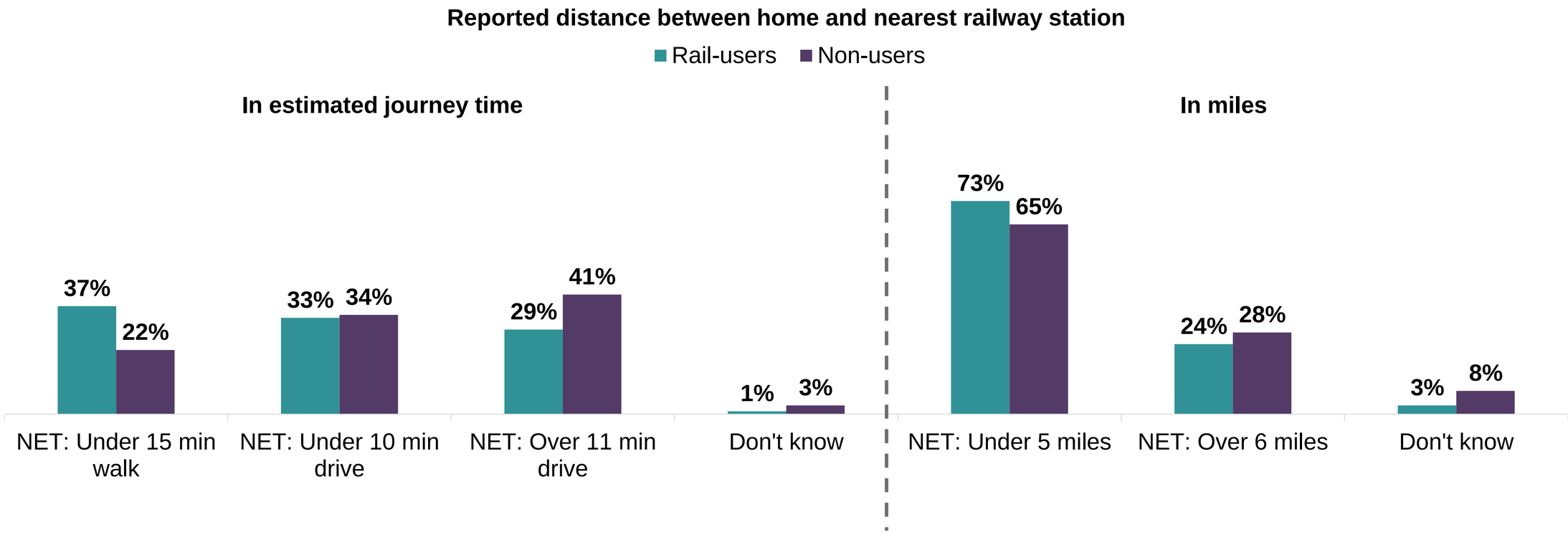
- Passengers consider the **total journey time (**door to door) when considering options
- Though fast, rail can be seen as a complicated way of traveling
  - Complicating factors include the last mile and the possibility of changing trains or modal interchange
- There is a strong preference for **direct** journeys
  - Respondents are more likely to choose a direct journey than one requiring a change even when the journey time increases by up to 50%
- Speed is the clearest motivation for using rail – but fast journeys are often also simple ones

Which of the following would you prefer…



A3A / A3B / A3C. Thinking now about a hypothetical train journey from your nearest station, which of the following options would you prefer to get to your destination? All respondents (n=3,000)

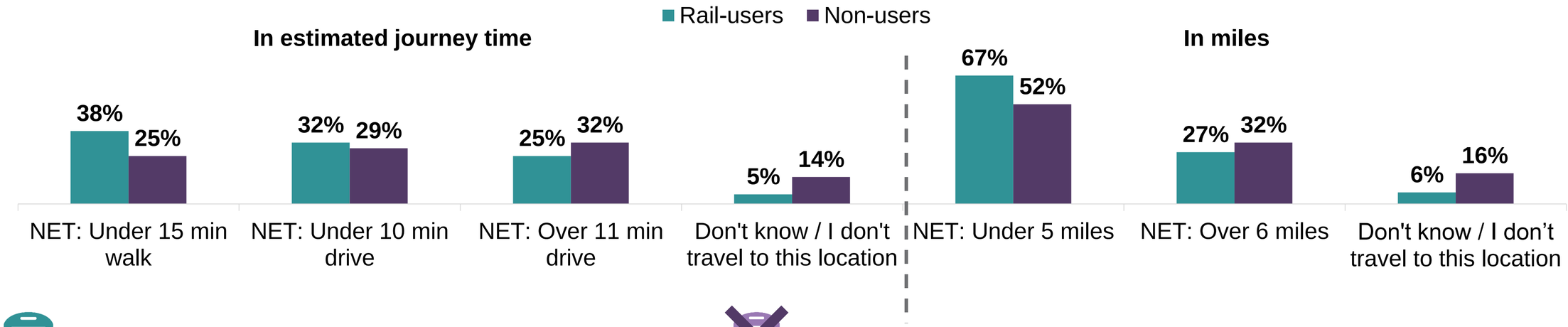
A key determinant of rail usage is therefore the proximity of stations to home – rail-users are more likely to live close to a station



D12. How close do you live to the nearest railway station (this could be on local or national lines)? All respondents (n=3,000)
D12A. How close do you live to your nearest railway station in miles? All respondents (n=3,000)

Proximity to workplace is also important – rail-users are also more likely to work within a 15-minute walk of a station

Reported distance between nearest railway station and your workplace (pre-Covid-19)
– all those in employment

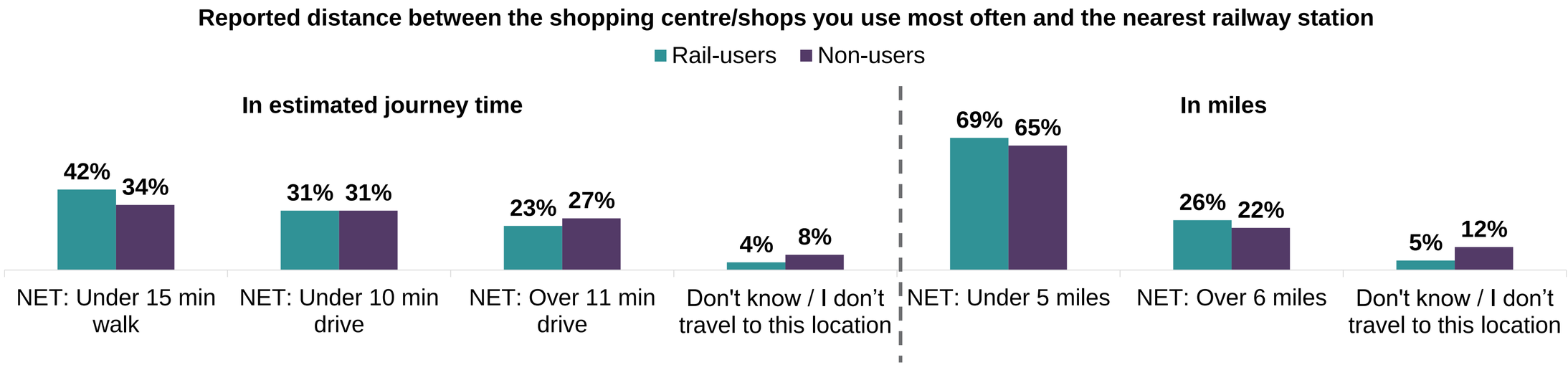


Almost half (**48%**) of those commuting by train at least once a week (a subset of rail-users) say their workplace is less than a 15-minute walk away from the nearest station

Non-users are significantly more likely to say they don’t know how far their workplace is from a station than rail-users. They are also more likely to say they don’t know when asked about their workplace compared to their home, suggesting they are less likely to consider rail a possibility

D15. How close is the nearest railway station to your workplace (pre-Covid19 lockdown)? All participants who travelled to work (n=1,779)
D16. How close is the nearest railway station to your workplace (pre-Covid19 lockdown) in miles? All participants who travelled to work (n=1,779)

But the proximity of stations to shopping destinations would seem to be less important than their proximity to homes and workplaces



When estimating the distance in miles between shops and the nearest station, rail-users are no more likely to report a distance of under 5 miles than non-users, and rail-users are actually slightly more likely to estimate the distance is over 6 miles. This reverses the trend seen for homes and workplaces. suggesting that proximity to shopping destinations is less likely to be an important factor influencing rail use

D15. How close is the nearest railway station to the shopping centre/shops you use most often? All respondents (n=3,000)
D16. How close is the nearest railway station to the shopping centre/shops you use most often in miles? All respondents (n=3,000)

Comfort is an important motivator for long-distance leisure travel

- Comfort is second only to speed as a motivation for long-distance leisure travel
  - Rail-users have positive perceptions about the experience of long journeys, in contrast to the hectic experience of commuting
  - Casual users sometimes view train travel as a ‘treat’ when this is their primary experience of rail
- Casual rail-users (who do not commute) often expect that travelling at peak time would be uncomfortable and unpleasant
  - Factors that influence passenger comfort include cleanliness, the behaviour of other passengers and whether seats are available

But reality may improve on expectations – 22% of frequent rail-users say comfort is a reason why they commute over short distances, compared to 15% of casual users

% selecting comfort/relaxation/enjoyment as the reason for traveling by train

31% long-distance **vs.** **25%** short-distance

(leisure travel)

“CrossCountry trains are cleaner, less crowded and more comfortable. The seats are bigger and better and that makes the journey a lot more pleasurable.”

(Rail-user, Midlands)

R3. Why did you use the railway for short distance travel – Leisure (e.g. days out, visiting friends/family, entertainment)? All who use trains to travel short distances at least once a year for leisure (n=1,630)
R5. Why did you use the railway for long distance travel – Leisure (e.g. days out, visiting friends/family, entertainment)? All who use trains to travel long distances at least once a year for leisure (n=1,454)

06 Barriers to rail use

Non-users are those for whom rail does not offer speed or convenience compared to alternatives

Rail-users say they take the train because it is **quick and convenient**

Major barriers to non-users taking the train are that **traveling by car is quicker** and **allows you to go from A to B**

- Qualitative evidence suggests that rail is considered quick and convenient when an individual's particular journey aligns with the rail network – in other words, when A and B are close to stations
- When A and B are not close to stations, rail can be (or appears to be) complicated and slow
  - This is not only about proximity to stations, but also how many legs to the journey there are, and the risk of delay at each one
  - This is particularly true for short-distance travel, where journey complexity and the risk of delay are seen to outweigh the benefit of the speed of travel once you are on the train

Speed & perceived inconvenience, cost and preference for traveling by car are the chief barriers for non-users

Speed/inconvenience

- Car is seen as a quicker and more direct mode of transport
- Using rail often involves complex, multi-modal journeys which slow down journey time

Cost

- Rail is seen as expensive
- This is particularly a barrier to using rail for long-distance travel
- The link between affluence and rail use suggests that price may be a more important consideration for non-users

Preference for car

- A high proportion of non-users simply *prefer* traveling by car, particularly for long distances
- Comfort, peace of mind and control are key drivers of preference
- Car-users have a stronger emotional attachment to their vehicle than rail-users

Experience

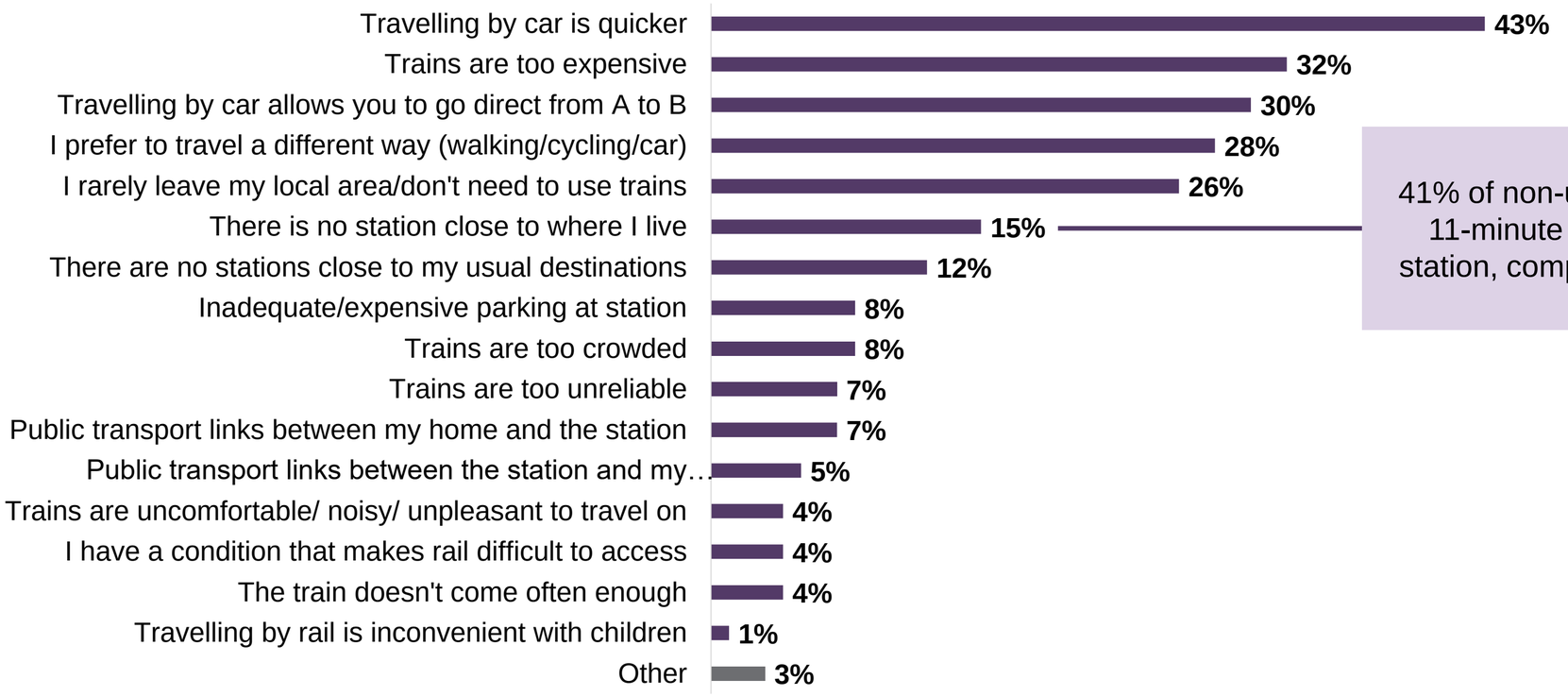
- Perceptions of trains as crowded, unreliable or unpleasant are less important barriers than practical factors
- As are factors such as station parking and public transport links at either end of the journey

Important factors; in order of importance from left to right

Relatively less important

43% of non-users choose not to use the train for short-distance travel as they see the car as quicker

Reasons given for not using the train for short-distance travel
– all non-users

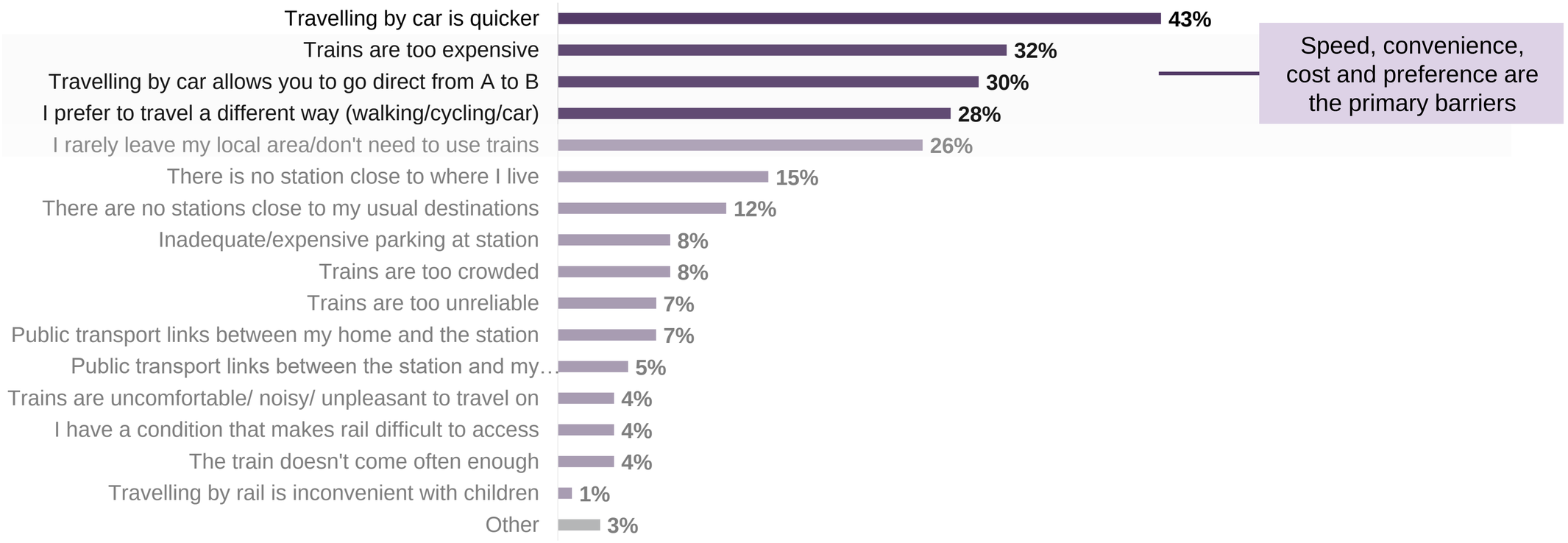


41% of non-users report living over an 11-minute drive from their nearest station, compared to 29% of rail-users

N1. Before the Covid-19 lockdown began, why didn't you use trains for short distance travel? All non-users (n=957)

43% of non-users choose not to use the train for short-distance travel as they see the car as quicker

Reasons given for not using the train for short-distance travel
– all non-users



Speed, convenience, cost and preference are the primary barriers

N1. Before the Covid-19 lockdown began, why didn't you use trains for short distance travel? All non-users (n=957)

43% of non-users choose not to use the train for short-distance travel as they see the car as quicker

Reasons given for not using the train for short-distance travel
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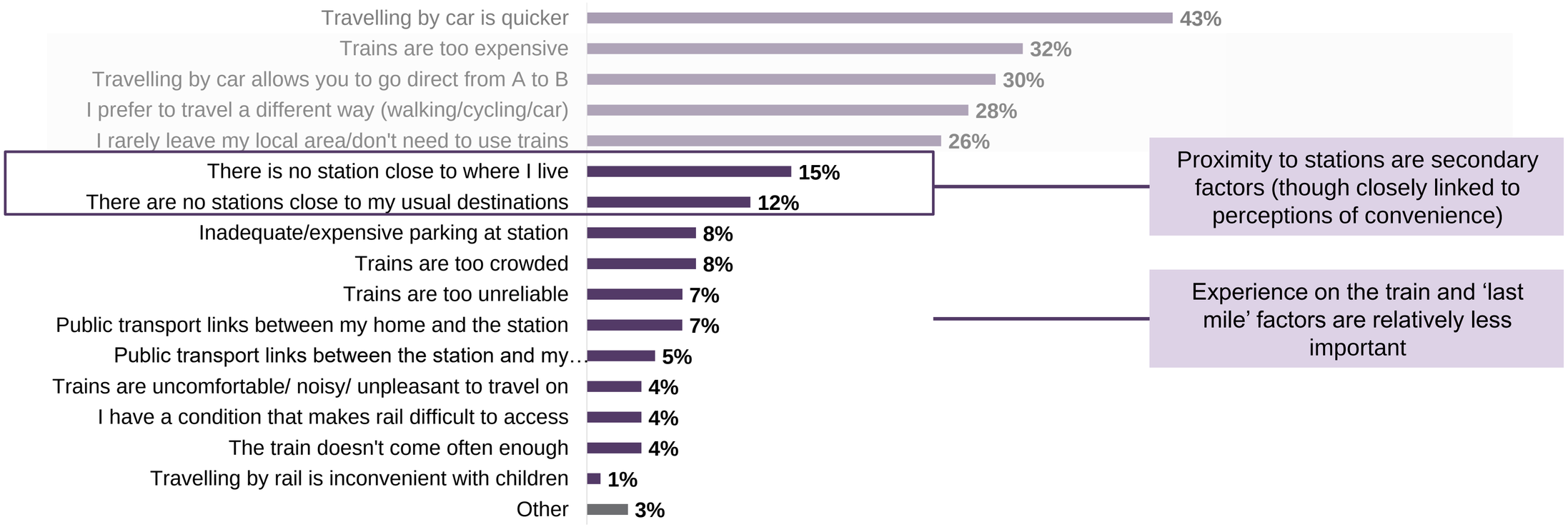


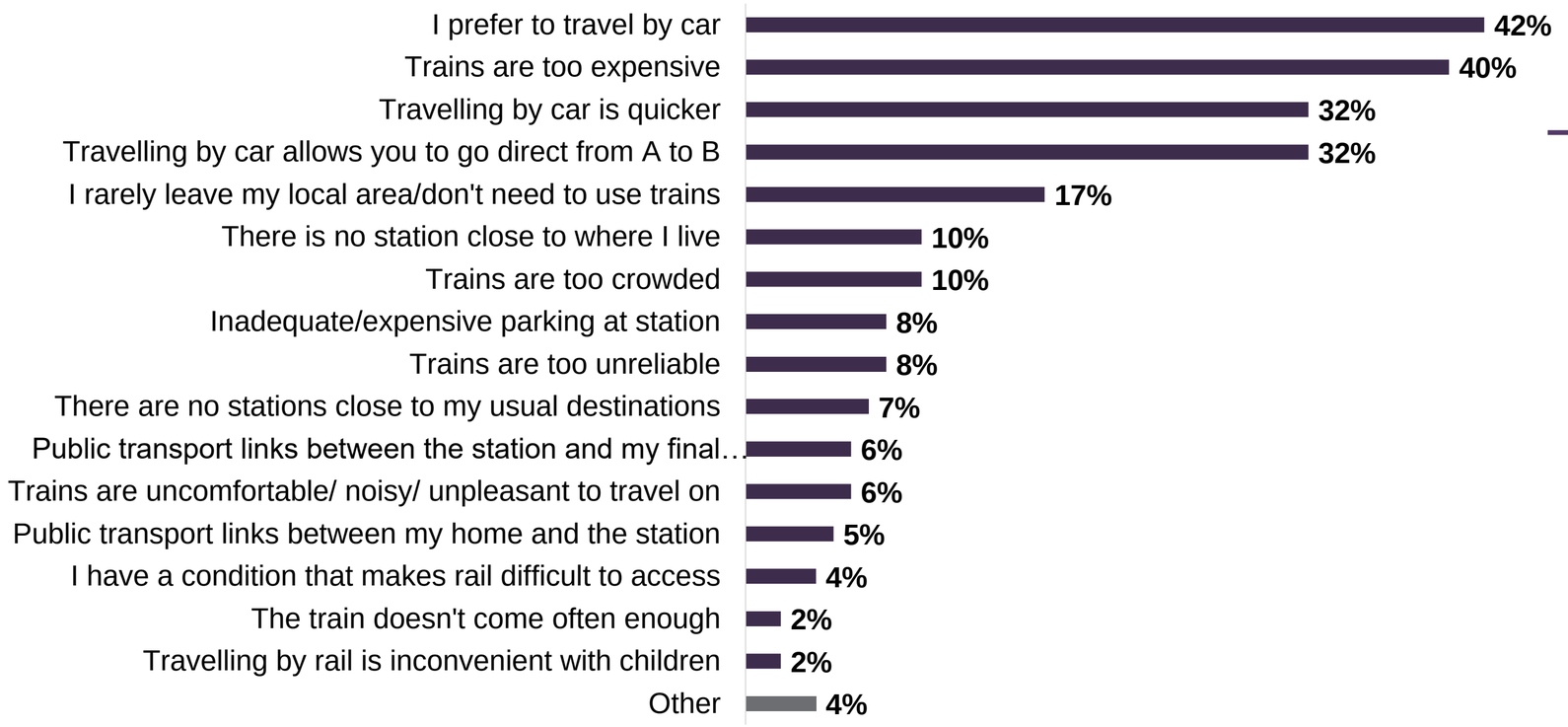
Proximity to stations are secondary factors (though closely linked to perceptions of convenience)

Experience on the train and ‘last mile’ factors are relatively less important

N1. Before the Covid-19 lockdown began, why didn’t you use trains for short distance travel? All non-users (n=957)

Preference for the car and the cost of rail become more significant barriers for long-distance travel

Reasons given for not using the train for long-distance travel
– all non-users



Speed and convenience are also important

N2. Before the Covid-19 lockdown began, why didn’t you use trains for long distance travel? All non-users (n=957)

The cost of train travel is prohibitive for many non-users, and the expense of car travel is not thought of in a comparable way

Expensive fares, punitive pricing and hidden costs

- Rail-users and non-users see fares as expensive
- Pricing seems punitive to non-users due to the need to book far in advance for the best deals and the risk of traveling with the wrong ticket

“There are cheaper tickets now and then but that’s from the Trainline. Other than that, trains are expensive on the whole.”

(Non-user, North)

- Non-users are also conscious of the additional costs which can stack up
- Including the cost of parking or additional public transport fares at either end of the journey

“Parking at stations is too expensive, it adds up. I feel like it should be subsidised to incentivise train travel.”

(Non-user, Midlands)

Sunk costs

- By contrast, the costs of car travel are not explicitly accounted for in the comparison between rail and car
- Many running costs such as insurance and maintenance are not considered on a per-journey basis

“I may as well just take the car and not have to pay for station parking, train ticket and getting to your destination at the other end.”

(Non-user, Midlands)

When looking at influences on choice in focus groups, non-users have practical and emotional reasons for preferring their car

Drawing on behavioural science to consider what influences decisions:

Intuitive, emotional, automatic
e.g. heuristics, context

Feeling of control and autonomy

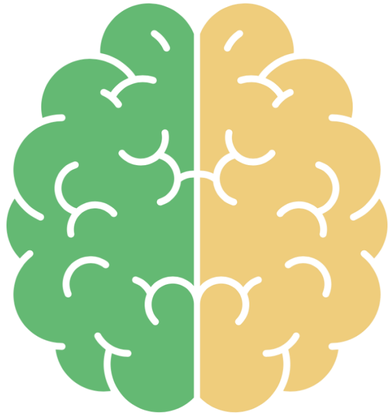
Enjoyment of driving

Safety and privacy

Habit of relying on the car

"I feel more in control of my journey when I get the car. I'm not in someone else's hands. I can put my own music on and I'm not worried that people are listening to me or crowding me."

(Non-user, Midlands)



Conscious, reflective, considered
e.g. cost/benefit, logical

Convenience, direct A to B

Easier to travel with children

Easier to take luggage

"I live a bit more rural. These other forms of transport aren't feasible in terms of time and convenience. For me to make my journey to work the car is there and it's easy. Public transport just doesn't work where I live."

(Non-user, North)

This contrasts with rail-users who, in the qualitative research, cite practical reasons for traveling by train but few emotional ones

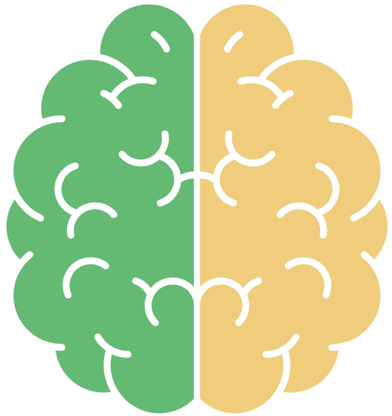
Drawing on behavioural science to consider what influences decisions:

Intuitive, emotional, automatic
e.g. heuristics, context

Relaxation / 'peace of mind'

"I like the experience of being on a train. I know it's stressful but once you are on the train and you're settled you can look out the window."

(Rail-user, North)



Conscious, reflective, considered
e.g. cost/benefit, logical

Speed

Most convenient option

Close to home/destination

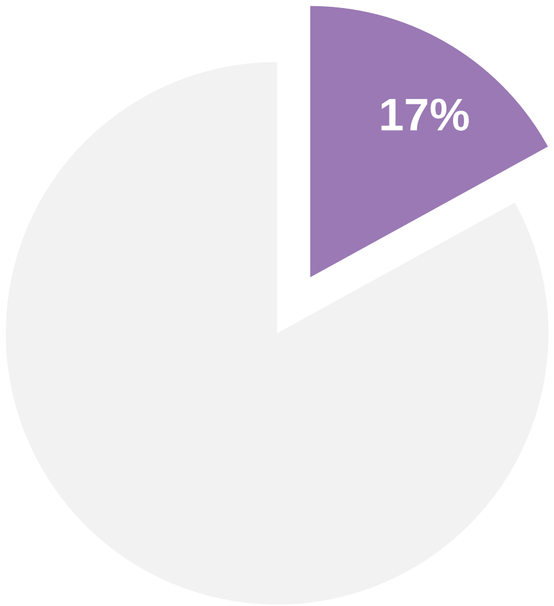
"Trains in the local area are reliable, they're well connected, I have a station close to home. It just works for me."

(Rail-user, Midlands)

Non-users' more emotional attachment to the car means they will be harder to shift to rail through practical improvements alone – they will need stronger levers

Finally, those who don’t drive are either less likely to travel generally, or to cite distance from stations as a barrier

% non-users selecting modes of transport other than the car as their main way of traveling for leisure



- The 17% of non-users who select modes of transport other than the car as their main mode of leisure travel are more likely to say that they don’t use the train because:
  - They **rarely leave their local area / don’t need to use the train** – 40% select this option for short-distance travel and 31% for long-distance
  - Their **homes and destinations are not close to a station** – 24% say they don’t take the train for short-distance travel as there is no station close to where they live, and 19% that there are no stations close to their usual destinations

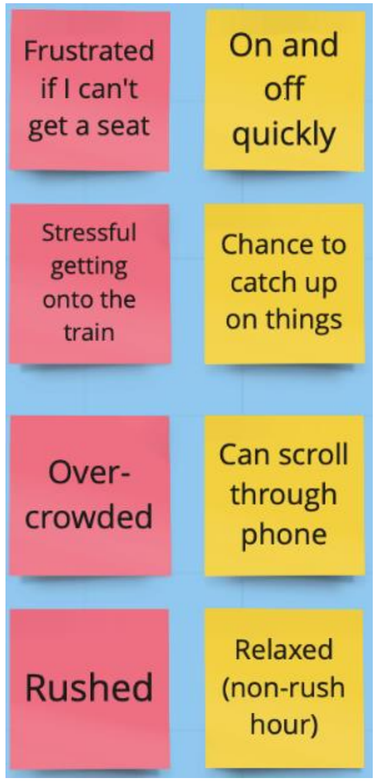
N1. Before the Covid-19 lockdown began, why didn’t you use trains for short distance travel? All non-users selecting modes of transport other than the car as their main way of travelling for leisure (n=104)
N2. Before the Covid-19 lockdown began, why didn’t you use trains for long distance travel? All non-users selecting modes of transport other than the car as their main way of travelling for leisure (n=957)

07 Current perceptions of rail

On balance, qualitative associations with train are positive, with commuters tending to have more specific negative feedback

Rail-users

- Rail-users have wider associations with rail based on breadth of experiences
- Rail-users tend to associate rail with being a convenient and hands-off form of travel
- However, many also have strong associations of overcrowding, particularly among commuters



Non-users

- Non-users base their perceptions of rail on infrequent, non-recent experiences
- Long journeys are seen as relaxing and a treat once on the train
- However, non-users can also perceive rail travel to be complex and stressful logistically

*Screenshots of Miro notes taken from the online focus groups

Despite rail-users having suggestions for improvement, overall the current service is seen to meet their needs

- Speed
- Convenience
- ‘Hands-off’ mode of transport – can work, ‘scroll on phone’

- Overcrowding – unpleasant / may not get a seat
- Stressful during peak times
- Delays and cancellations

- Despite this, the train was often described as the most reliable and an effective way to travel if their home and the destination were near a rail station
- Though there are some issues, these are not strong enough to dissuade people from using rail, though they may avoid peak travel for certain journeys (e.g. with children / with bags)

Non-users have quite fond memories and associations of rail travel, which is often described as a treat

- The rare journeys infrequent and non-users tend to take are longer journeys for special circumstances such as holidays or visiting friends – seen as comfortable, exciting and ‘a treat’
- Older non-users describe feeling stressed or anxious when boarding or changing trains, highlighting a lack of assistance and support staff, or poor accessibility
- However, on the whole, it is not negative experiences that have driven passengers away from rail, but practicality and distance from the station
  - Non-users in the focus groups described living over a 5-minute drive from a station making rail travel inconvenient, particularly for short journeys

“I’d think it’s exciting. I don’t use the train so much, so it’s more relaxing than driving if it’s a long journey.”

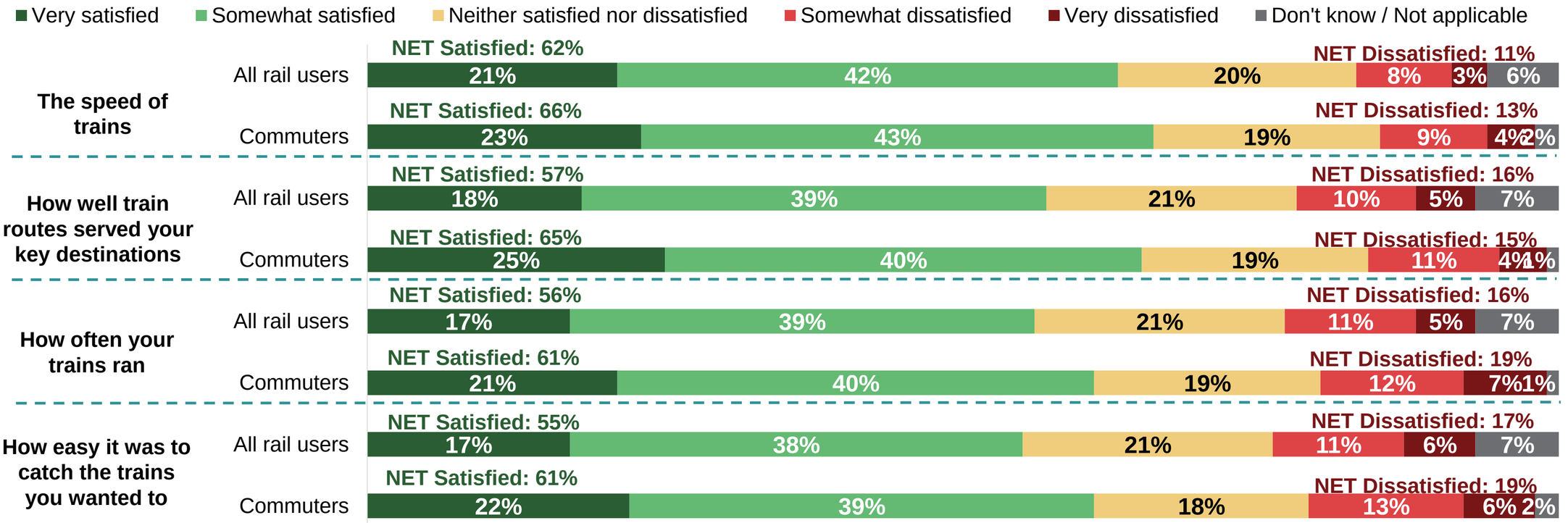
(Non-user, North)

“With a train it’s a-to-b, c-to-d, d-to-e, a lot more pre-planning to get to where you want to be. You have to rely on the timetable running efficiently.”

(Non-user, North)

This is reflected in the survey. Most rail-users feel satisfied with speed, connectivity and capacity, and commuters are slightly more likely to be satisfied

Satisfaction with each of the following elements of rail
– all who use trains frequently or casually

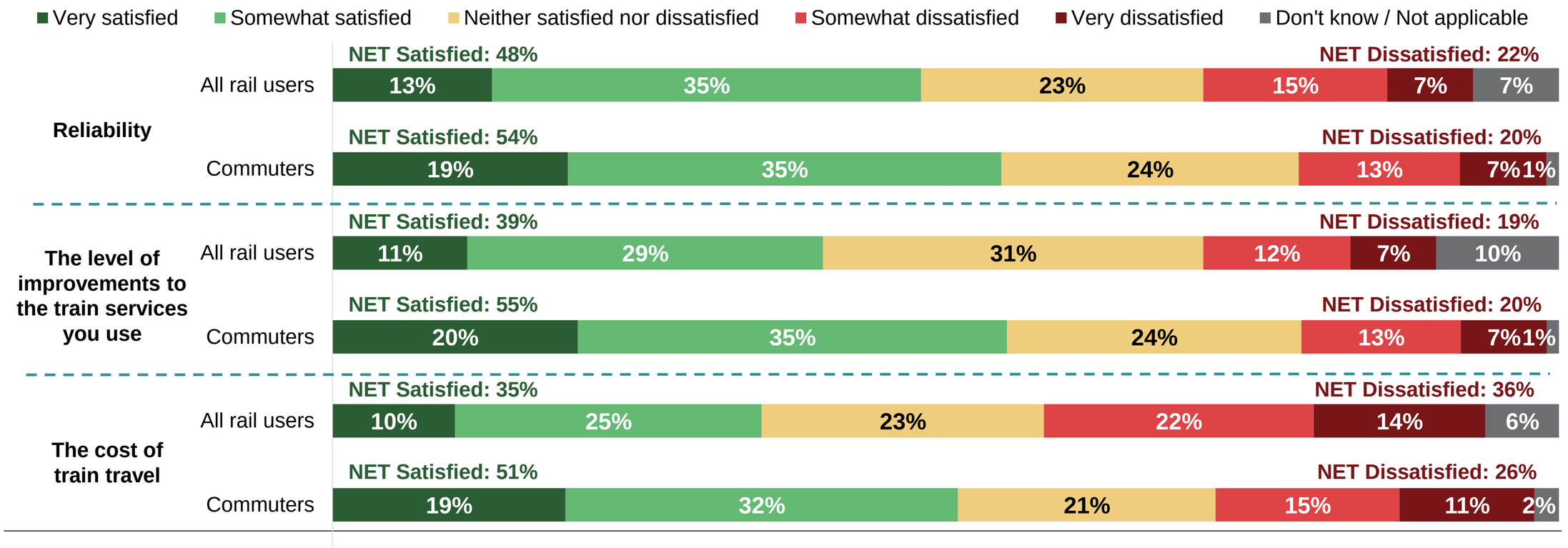


R1. Before the Covid-19 lockdown began, how satisfied were you with each of the following elements of rail? All rail-users (n=2,043), all commuters (n=411)
Commuters are defined as those who report usually using the train at least once a week to commute for work/study for either short or long journeys

Due to rounding conventions, the NET figures on this chart do not sum to the chart %s

However, satisfaction levels are lower with regards to reliability, level of improvements and cost – though commuters are also more likely to be satisfied

Satisfaction with each of the following elements of rail
– all who use trains frequently or casually

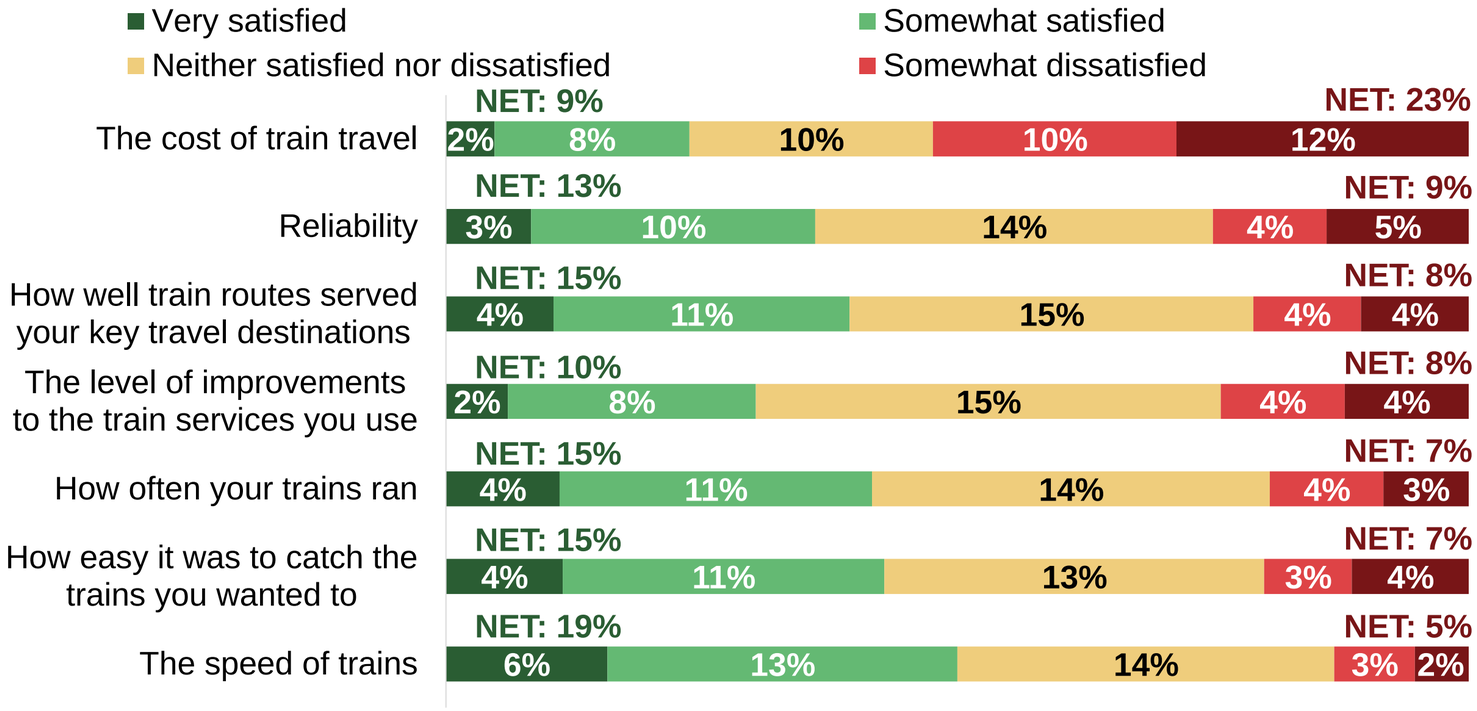


R1. Before the Covid-19 lockdown began, how satisfied were you with each of the following elements of rail? All rail-users (n=2,043) (n=2,043), all commuters (n=411)
Commuters are defined as those who report usually using the train at least once a week to commute for work/study for either short or long journeys

Due to rounding conventions, the NET figures on this chart do not sum to the chart %s

Cost is also the area of lowest satisfaction among non-users, 23% say they are dissatisfied with cost compared to 9% on reliability and 8% on how well routes serve key destinations

Satisfaction with each of the following elements of rail*
– non-users



- Cost also emerged in the qualitative research as a strong barrier to rail
- Non-users factored multiple costs associated with trains

Cost is seen as better by commuters: 52% of rail-users who commute at least once a week are satisfied with the cost of rail compared to 35% of all rail-users

R1. Before the Covid-19 lockdown began, how satisfied were you with each of the following elements of rail? All non-users (n=957)

Due to rounding conventions, the NET figures on this chart do not sum to the chart %s

***N.B.: 'Don't know' responses excluded in this chart**

While there is not explicit demand for new lines, some infrequent and non-users in the qualitative research commented on a lack of connectivity and accessibility

- Non-users in particular raised the issue of poor connectivity as the main reason for not using rail
- For those who do not live near a train station, rail was seen to be inaccessible and inconvenient, particularly when compared to other forms of transport
  - For these participants, travelling by rail would only become an option if there was a station closer to their home

"Main reason I don't use rail is because of access. I would only use it if it was near somewhere I wanted to go, but it rarely is."

(Non-user, Midlands)

"I don't live by a station so I don't use it often, but I'd be more likely to get a train on a UK holiday break to be honest."

(Non-user, North)

08 Preference and priorities for future investment

The ranking shows a strong preference for improvements linked to capacity over connectivity overall

Preferred option

Number	Priority for improving rail	Share of preference*
1	More seating availability / less crowding	21.5%
2	More reliable services (fewer delays and cancellations)	16.0%
3	Having a station close to where I live	9.8%
4	Trains running more frequently	9.3%
5	More direct train routes (to connect more destinations)	8.9%
6	Cheaper train station parking	6.5%
7	Better connections between rail and other types of transport (e.g. tram, bus, etc)	5.6%
8	Faster trains	5.5%
9	Having stations close to my usual travel destinations (e.g. work, shops, etc)	4.7%
10	Less disruption due to planned engineering works	4.6%
11	Better connections with other rail services	3.8%
12	More train station parking	3.5%

Preferred 1.3x as much as next option

Preferred 1.6x as much as next option

M1. assuming things return to normal following Covid-19, which of the following options do you think should be priorities for improving rail services? All (n=3,000)

*Share of preference refers to the number of times an option will be chosen over the other options

Linked to capacity

Linked to connectivity

Almost all rail-users showed a preference for improved capacity and reduced crowding

- This preference for improved capacity was especially prevalent amongst commuters
- Preferences were in some regard dictated by situation
  - For example, if you don't live near a station you would be more likely to prioritise increasing the number of stations
- We also found that some people struggled to imagine a new line, or were cynical that this would be a possibility
  - They would therefore opt for increased capacity as it felt more tangible, easy to imagine and most likely to happen given the cost of new lines

"More trains at peak times would be the best improvement that could be made. There are just too many people using trains during rush hour."

(Rail-user, Midlands)

"It's not accessible to me, I don't live close enough to the station so I'm probably very unlikely to use it. Even if the train is busier and fancier, I'd use it if it was accessible to me, I'd want to be able to walk."

(Non-user, North)

Non-users show a stronger preference for having a station closer to home, compared to rail-users who value reliability

Priority for improving rail	Share of preference*			
	Rail-users	Non-users	Difference between rail-users and non-users	
			Rail-users	Non-users
Having a station close to where I live	0.0895	0.1167		-0.0272
Cheaper train station parking	0.0564	0.0829		-0.0265
More reliable services (fewer delays and cancellations)	0.1678	0.1429	+0.0249	
Faster trains	0.0613	0.0407	+0.0206	
Trains running more frequently	0.0992	0.0806	+0.0186	
Less disruption due to planned engineering works	0.0503	0.0379	+0.0124	
Having stations close to my usual travel destinations	0.0444	0.0528		-0.0084
More train station parking	0.0338	0.0386		-0.0048
Better connections between rail and other types of transport	0.0549	0.0595		-0.0046
More seating availability / less crowding	0.2138	0.2183		-0.0045
More direct train routes (to connect more destinations)	0.0878	0.0910		-0.0032
Better connections with other rail services	0.0389	0.0367	+0.0022	

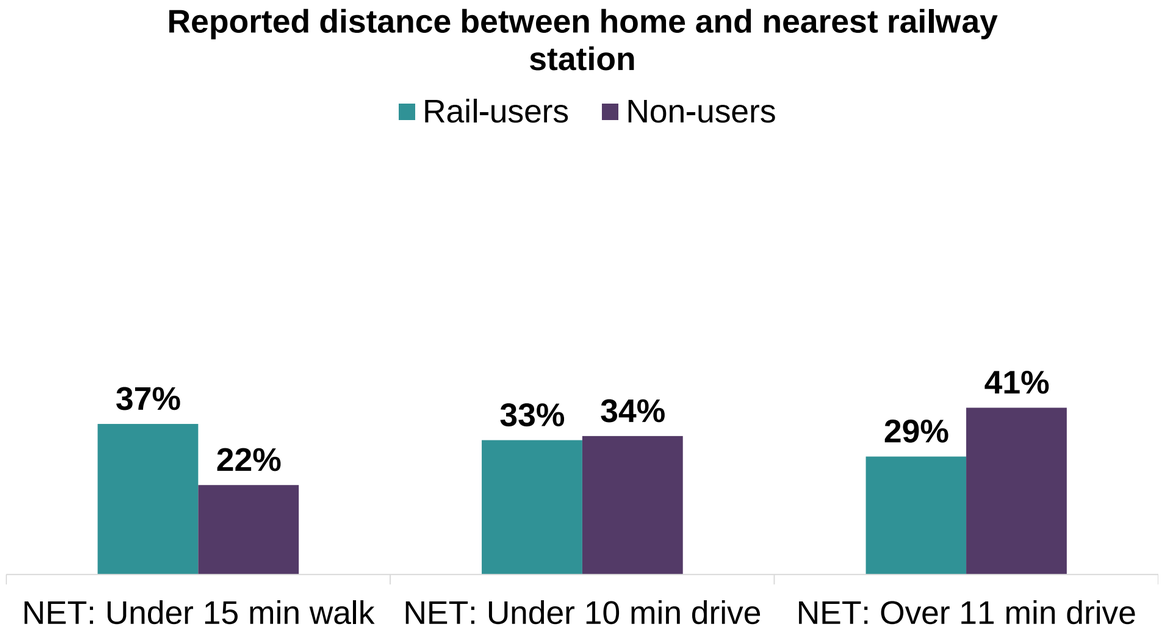
M1. assuming things return to normal following Covid-19, which of the following options do you think should be priorities for improving rail services?
All respondents (n=3,000); All rail-users (n=2,043); All non-users (n=957)

*Share of preference refers to the number of times an option will be chosen over the other options

Linked to capacity

Linked to connectivity

However, a fifth of non-rail users already live within walking distance of a station – pointing to connectivity improvements alone not being enough



This is supported by the level of influence of factors outside rail (and NIC's scope) have over journeys:

- Within the survey, the **expense or inadequacy of parking** at your destination is the second-most-frequently cited motivation for taking the train for short-distance leisure travel among rail-users
- The strong desire in the data and qualitatively for **'simple' journeys**
- The **perceived expense of train travel**, particularly when not travelling in advance, not being seen as balanced with the cost of travelling by car
- Qualitatively, the **broader emotional barriers** to train travel such as anxiety/stress about getting to stations and on the right train, the behaviour of and proximity to strangers, etc.

Rail-users show a stronger preference for reliability, while direct train travel is preferred amongst non-users

Top 3 preferences

1. More **reliable** trains in **my region** (45%)
2. Direct **long-distance** travel in the UK **without having to change trains** (41%)
3. More **reliable** trains going **long distance** in the UK (40%)

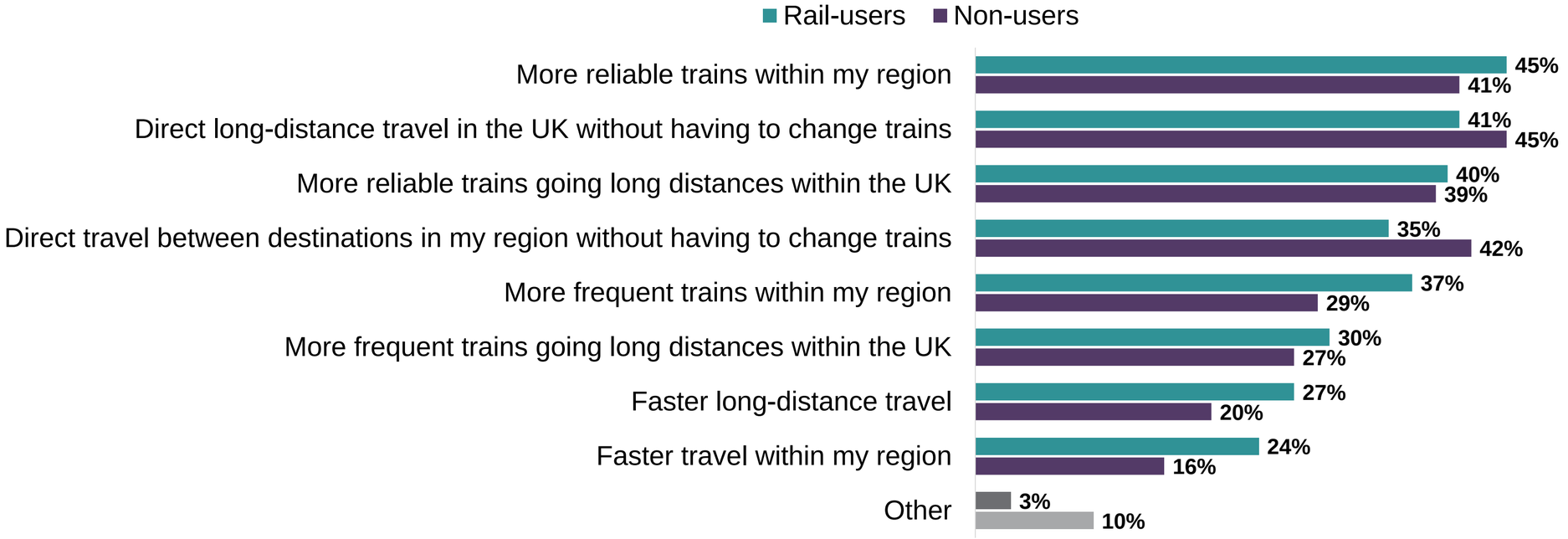
Top 3 preferences

1. Direct **long-distance** travel in the UK **without having to change trains** (45%)
2. Direct travel between destinations in **my region without having to change trains** (42%)
3. More **reliable** trains in **my region** (41%)

From the qualitative research, we know participants are likely to be thinking about changes that would improve their current journeys, rather than thinking about what would encourage them to start using rail for new or different types of journeys

Overall speed is least prioritised by both rail users and non-users

% selecting each of the following as their top three improvements rail investment should enable
– all participants



From the qualitative research, we know participants are likely to be thinking about changes that would improve their current journeys, rather than thinking about what would encourage them to start using rail for new or different types of journeys

Other suggestions for improvements were spontaneously raised by participants, though these fall out of the NIC's remit

- Increased staff numbers and assistance was mentioned by many, and was strongly highlighted by older participants and non-users who felt uncomfortable using rail
- Better policing and controlling of anti-social behaviour was also raised by some who perceived this as a common problem – and a barrier to using rail – particularly in evenings (when they felt it was more of a problem)
- Having more consistent ticket pricing, which does not vary hugely depending on when the ticket is bought, was also raised by a number of participants

"Having more assistance on trains. Help buying tickets, finding the right platform and trains, help when having to change trains… that's what would make me use trains more"

(Non-user, Midlands)

"I just have to hope there's no one sitting in my seat… I've been on a few trains where people have been drunk and staff do nothing about it."

(Rail-user, North)

Preferences for types of disruption

We explored preferences for length of time versus level of impact of disruption

The ranking of priorities for improvements to rail points to there being acceptance of some level of disruption *in principle*

Number	Priority for improving rail	Share of preference*
1	More seating availability / less crowding	0.2152
2	More reliable services (fewer delays and cancellations)	0.1599
3	Having a station close to where I live	0.0982
4	Trains running more frequently	0.0933
5	More direct train routes (to connect more destinations)	0.0888
6	Cheaper train station parking	0.0648
7	Better connections between rail and other types of transport (e.g. tram, bus, etc)	0.0563
8	Faster trains	0.0547
9	Having stations close to my usual travel destinations (e.g. work, shops, etc)	0.0471
10	Less disruption due to planned engineering works	0.0463
11	Better connections with other rail services	0.0382
12	More train station parking	0.0354

Having less disruption ranked lower as a priority for improving rail when being weighed against the benefits. It is possible that when asked to think about disruption in isolation, passengers may afford it greater importance than it would otherwise merit (i.e. the ‘focussing illusion’). Its relative low priority here may therefore be due to it being encountered against other options.

It is also worth noting that here respondents were being asked to think about improvements to current services i.e. they are likely to be thinking about current and past experiences of ‘engineering works’ more associated with general maintenance than a new significant programme of improvement works. Qualitatively, several participants spoke about being ‘used to’ these kinds of works.

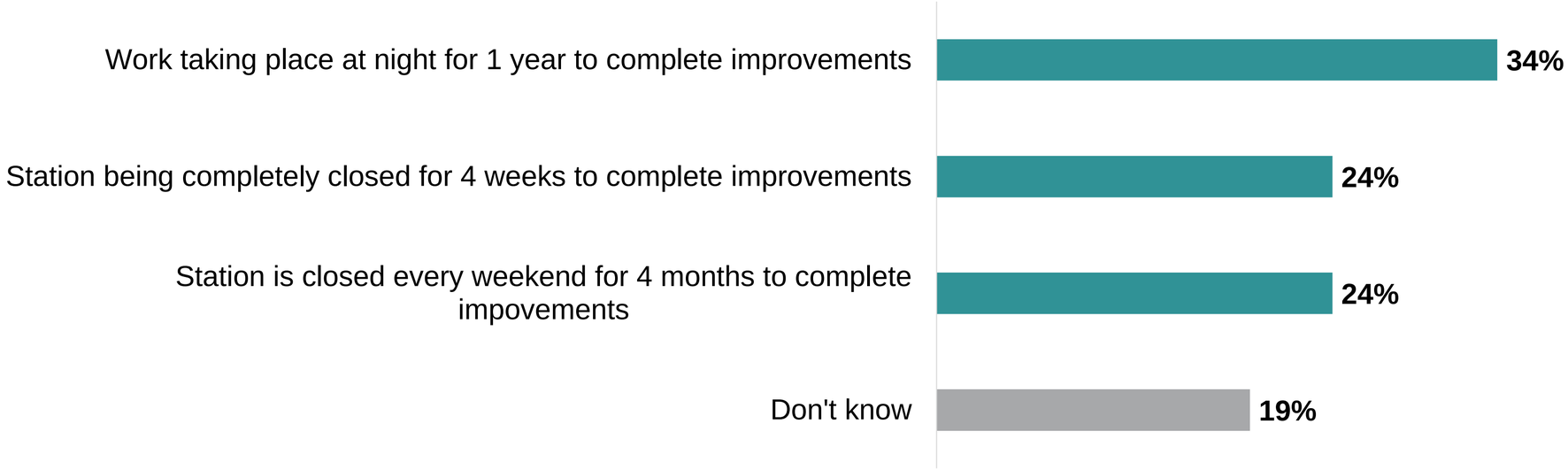
Overall, in both the quantitative and qualitative research, respondents prioritise the minimisation of disruption over the possibility of completing it quickly.

M1. assuming things return to normal following Covid-19, which of the following options do you think should be priorities for improving rail services? All (n=3,000)

*Share of preference refers to the number of times an option will be chosen over the other options

However, on the whole, rail-users prefer that disruption to services is minimised and accept a longer period for works to be completed

% selecting each of the following rail improvements as their preferred method
– all rail-users



R7. If there were major improvement works happening on your rail line, which of the following would you prefer? All rail-users (n=2,043)

We tested the following options for level of disruption in the focus groups

1. Engineering work takes place at weekends only and trains would be replaced with buses for part of the journey, but there is no disruption to train services Mondays to Fridays. The work would take **1 year** to complete.
2. The railway is closed entirely on part of the route for 3 months due to engineering work, and you need to travel from a different station for that period. The work would take **3 months** to complete.
3. Engineering work takes place overnight between 10pm and 5:30am every day, with late-night trains replaced with buses, but trains run as normal between 5:30am and 10pm every day. The work would take **6 months** to complete.

The same preference emerged in the qualitative testing – a strong preference for reducing the impact of disruption over completing work quickly

- A large majority of participants opted to maintain services during weekdays with a longer delivery timeline. This is because:
  - This option would have **minimal impact on commuters** (with non-users also keen to avoid roads becoming busier)
  - Rail travel at evenings in the Midlands and the North tends to be infrequent or non-existent, so this would have **minimal impact on current services** – meaning it felt like the logical choice
  - **Scepticism about delivery** (e.g. HS2) means that assurances of short timelines are not trusted – so users would rather retain some level of service as they assume timetables of shorter options would end up being extended

"There aren't that many trains in our region between those times [10pm – 5.30am] so that's fine for me. It doesn't sound very disruptive at all."

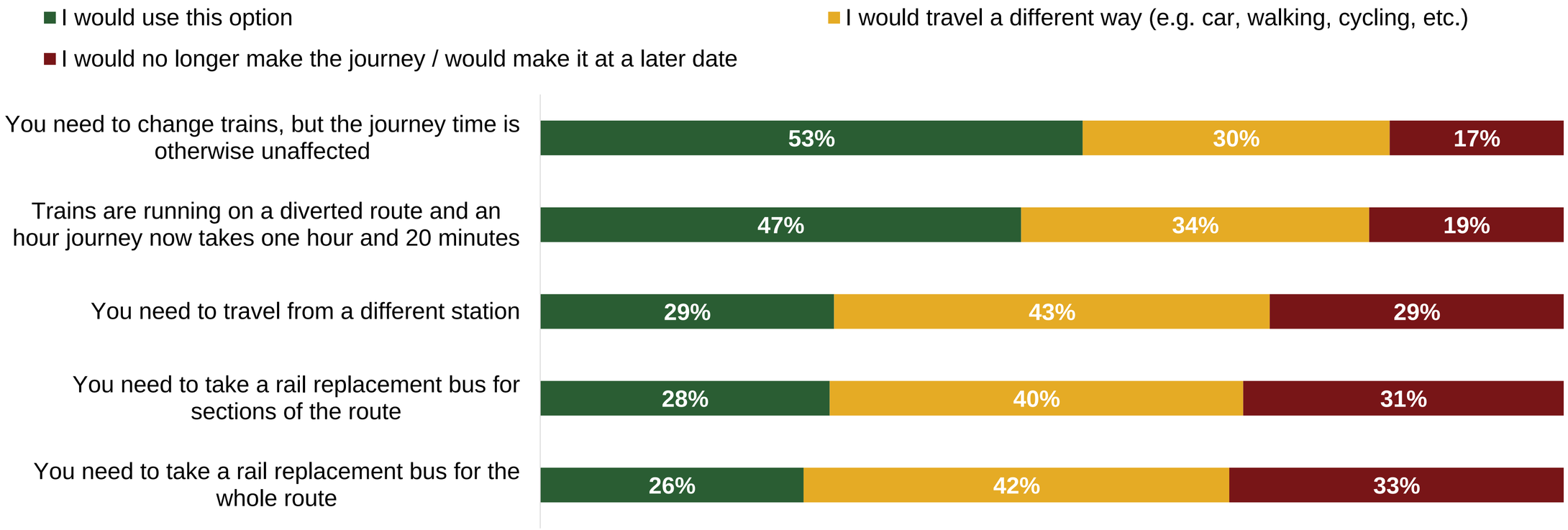
(Non-user, North)

"It doesn't matter to me how long they take doing something as long as they get it right. If we could see improvements and that things are better it wouldn't matter if it's 6 or 12 months so long as we see improvements."

(Rail-user, Midlands)

Rail-users least like the idea of a rail replacement bus or going to a different station

Choice of travel following disruption scenarios
– all rail-users



R6. Imagine things have gone back to 'normal' following Covid-19, and there were engineering works on a train route you were planning to use that day. How would each of the following options affect your travel plans? All rail-users (n=2,043)

Previous qualitative research we have conducted for NIC showed that perceived acceptability of disruption depends on 3 key components:

1 *Fundamental impact on lives*

- Understandably, the main judgement of acceptability rested upon how much the disruption will personally affect the individual.
- Disruptions which could impact basic necessities (e.g. job security) were seen as least acceptable.

2 *Feasibility to work around*

- The availability of substitutes (e.g. a different mode of transport) was a key element to perceived acceptability.
- Participants felt that even significant loss of service could be tolerated if they find ways to replace their needs.

3 *Communication*

- Lack of communication, leaving participants feeling out of control and unable to plan, was cited as a huge frustration of service disruptions.
- Advance notice, where possible, and accurate information about the length of disruption tended to lead to more tolerant attitudes.

Source: BritainThinks, Resilience and Regulation Social Research, 2019

09 Framing disruption

In the focus groups we tested a variety of reasons for disruption with participants

1. This improvement work will increase connectivity between key cities in the Midlands and North, allowing greater movement of people to boost local economies.
2. This improvement work will contribute to regional growth, and will enable that growth to happen sooner because rail disruption will mean improvements can be delivered faster.
3. This improvement work will help increase the destinations that you can reach from your local area, connecting you to key destinations in other parts of the UK.
4. This improvement work will increase the number of passengers able to use the trains at peak times, ensuring that more people from your local area can use the train.

Though participants like a focus on the local area, economic boosting due to rail improvements were received sceptically

1. This improvement work will increase connectivity between key cities in the Midlands and North, allowing greater movement of people to boost local economies.

Increased connectivity was particularly valued by non-users who felt that this was a much needed rail improvement

Participants liked the specific mention of the Midlands and the North due to common feelings of neglect

This specific language made people feel like overcrowding will increase further, and was particularly concerning among rail-users

Though some liked the sound of boosting local economies, some felt this link to be a stretch and unsubstantiated

Participants struggle to see the connection between rail and regional growth, and show a dislike for unspecified improvements

2. This improvement work will contribute to regional growth, and will enable that growth to happen sooner because rail disruption will mean improvements can be delivered faster.

Regional growth was described as jargon and brings negative reminders of HS2. Participants struggled to make the spontaneous connections between rail and regional growth

Participants picked up on these improvements being too generic and do not detail what improvements will be made. Some link this back to false promises made by politicians

Overall, the reasons for disruption that were more focused on specific rail improvements were felt to be the best justifications

3. This improvement work will help increase the destinations that you can reach from your local area, connecting you to key destinations in other parts of the UK.

This was particularly valued by non-users who tended to find issues in the connections and destinations available to their local area

On the whole, participants already felt that they were well-connected to key UK destinations and major cities. The only improvements suggested here tended to relate to direct travel to the seaside.

A focus on the easing of overcrowding on rail was seen in a positive light by rail-users, particularly commuters

4. This improvement work will increase the number of passengers able to use the trains at peak times, ensuring that more people from your local area can use the train.

Frequent rail-users were particularly fond of this reason for disruption as it spoke directly to their main issue of overcrowding when using rail, however some interpreted this as more passengers rather than more trains

Commuters felt particularly keen on easing of overcrowding during peak times

This specific language made some feel apprehensive about whether overcrowding will decrease if more people are using rail

Overall, the *reasons* for disruption that were more focused on *specific* rail improvements were felt to be the best justifications

- Those reasons for disruption which were telling people specifically why the works will be done and what the improvements will be made were better received
- Most participants showed a preference for capacity, while some non-users wanted improvements in connectivity
  - Some from the North in particular liked ‘connectivity’ as it sounds like a new line
- Specificity of place was also important, with many spontaneously highlighting the inclusion of the North and Midlands as positive

“I would be happy to see increased connectivity as a reason for why there are rail works because we have to look at the long term, but they have to take into consideration people who are using trains on a daily basis.”

(Rail-user, North)

General phrases about regional growth were met with more skepticism and confusion

- ‘Regional growth’ was either not understood or associated with political rhetoric
- Almost no participants in the qualitative research connected rail investment with economic growth
  - Even when prompted, participants found this difficult – it is not an existing narrative or an intuitive relationship
  - When thinking about economic impact, some thought this could only be about routes to London
  - One respondent thought that better rail services could potentially increase the likelihood of people living in the outskirts taking jobs in Liverpool
- Although participants liked the mention of focusing on local areas, they wanted to understand what the specific rail improvements would be

“To be honest, I’m cynical. It feels like a local or political type statement. Let’s see if it actually happens.”

(Non-user, North)

10 Conclusion

Headline key findings

1. **Speed and convenience are the strongest reported determinants of rail use**
2. **Non-users, however, do not see rail as fast or convenient in comparison with the alternatives**
3. **On balance, residents of the North and Midlands are fairly satisfied with their rail service**
4. **There is a clear preference for improvements to rail capacity**
5. **Respondents prioritise the minimisation of disruption for improvement works over completing work quickly**
6. **Specific rail improvements with tangible outcomes are sought out as justifications for disruption, rather than arguments related to regional growth**

Implications

Increasing capacity – particularly space on trains and overall reliability of services – is the clear preference for rail improvements among all rail users. However, this does not address the chief barriers to rail use among non-users.

- Rail-users feel they already have fairly good connectivity. Their preference for capacity is to improve their experience on train services (i.e. better guarantee of a seat, fewer delays and cancellations)
- The chief barriers to rail use among non-users relate to connectivity – their homes and destinations are not close to stations and so they do not see rail as fast. However, these are less likely to be stated priorities for future investment due to scepticism about feasibility
- While increasing capacity may encourage rail-users to take the train more often, therefore, improving connectivity is most likely to grow the proportion of those who use rail
- Further, the existence of a significant portion of non-users who already live close to a station (i.e. a fifth live within a 15-minute walk) points to interventions that look solely at improving rail connectivity or capacity alone are not enough, but that these would need to sit alongside wider improvements that are beyond the scope of this project (e.g. around expense of train vs. car, expense and availability of parking, broader emotional and motivational barriers to rail and often deep-seated preference for car) to effect modal shift.

Cynicism about the value and delivery of rail improvements means that people want to hear about tangible and measurable benefits

- There is a need to ‘show rather than tell’ people the benefits of rail improvements by describing the specific impacts that improvements will have on journeys
- Language relating to ‘boosting local economies’ and ‘regional growth’ is confusing and feels harder to evidence
- Current levels of service means that most are amenable to longer periods of disruption as long as disruption is minimal

Britainthinks
Insight & Strategy

Thank you

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