

PiDD-29 report

January 2020

Rail Delivery Group



Content

1. Introduction	5. Zoom in – Train cancellations
2. Disruptions	6. Zoom in – Frequency of the update
3. Satisfaction	7. Appendix
4. Improvements	

Introduction



Background and methodology



The overarching objective of the project is to have ongoing quantitative data to measure the **improvement in the quality of information to passengers** during disruption for all train operating companies (TOCs).

In May 2019, RDG awarded BVA BDRC the survey, which led to a few changes in the questionnaire and the way the survey was run and reported. This report is the second offline deliverable since that change.



This report is on the findings covering Wave 15 (October-December 2019). We also report on comparisons between waves to assess any change in trends.

The survey tracks the following:

- Information about the disruption
- Quantity and quality of information provided
- Satisfaction with how passengers are kept informed
- TOC usage and passenger demographics
- Hot topics: details on frequency of updates and alternative transport





























To achieve the objective, open survey links have been posted on the National Rail Enquiry (NRE) website and some TOC websites. Links were also shared by Twitter and customer relations departments.

Respondents taking part in the open link survey are very likely to have experienced a severe disruption. They are taking time to fill in a free found survey, to give feedback on their experience. Passengers doing so are motivated by their personal experience. As a results, the data shown in this report are likely to reflect results focusing on the poorer experiences. It also means that if a TOC has a greater number of disruptions, it is more likely to receive feedback which impacts on the overall data.

In May 2019 – BVA BDRC and RDG introduced a panel boost to target specific disruptions and TOCs. As shown in the appendix – these passengers had less negative experiences and their feedback is generally more positive.

Sample size for each TOC

Oct-Dec 19: Sample by TOCs (October – December 2019)

	17		3		17
	119		111		130
	402		121		139
	74		48		54
	12		13		241
	28		1012		112
	114		83	Don't know	43
	63		150	Other	9
	139		150		
	3		160	TOTAL	3,567

Summary of key findings

Developments

- Two in five respondents had their train cancelled this quarter.
- Most of them first heard about it at the train station.
- The delays experienced took one hour or more for two fifths.
- Both satisfaction measures (dealing with delays and information provision) are stable this quarter. However satisfaction before arrival at the station records the lowest score for both questions.
- To improve information provision TOCs need to focus on the frequency of updates.

Dealing with cancellations and improving satisfaction before arrival

- In order to improve satisfaction for passengers aware of the disruption before arrival at the station, TOCs need to work on the consistency of the information provided. Reliability of information is the top priority for improvement this quarter. TOCs need to work with NRE and other platforms to ensure information about delays and cancellations is consistent across all channels.
- Providing information when a train is cancelled is crucial, because if not it leads to the lowest level of satisfaction. Half of the respondents who have experienced a cancellation have not received any information at all. When they did 72% did not get any information about alternative train services which passengers would increasingly like to receive

Increasing the frequency of updates

- As seen wave on wave – the frequency of updates is the main driver for satisfaction.
- When asked 75% of respondents want regular updates but currently 68% receive only one or no updates at all.
- Ideally passengers want to be updated every 10 min (even if it means hearing/reading about the same update). The good news is that this is already the case for those who receive multiple updates. It also means that the main issue is not really the frequency but ensuring passengers get at all updated when disrupted.
- Commuters and passengers at the station would like to receive more frequent updates (every 5 min).

Disruptions

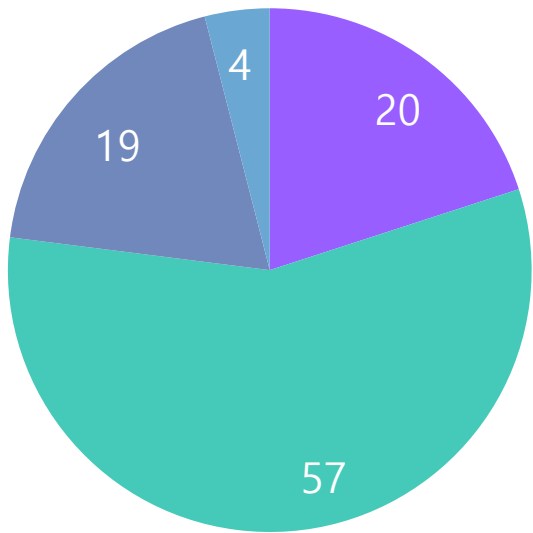
– What happened this wave



Journey stages and reasons for disruption

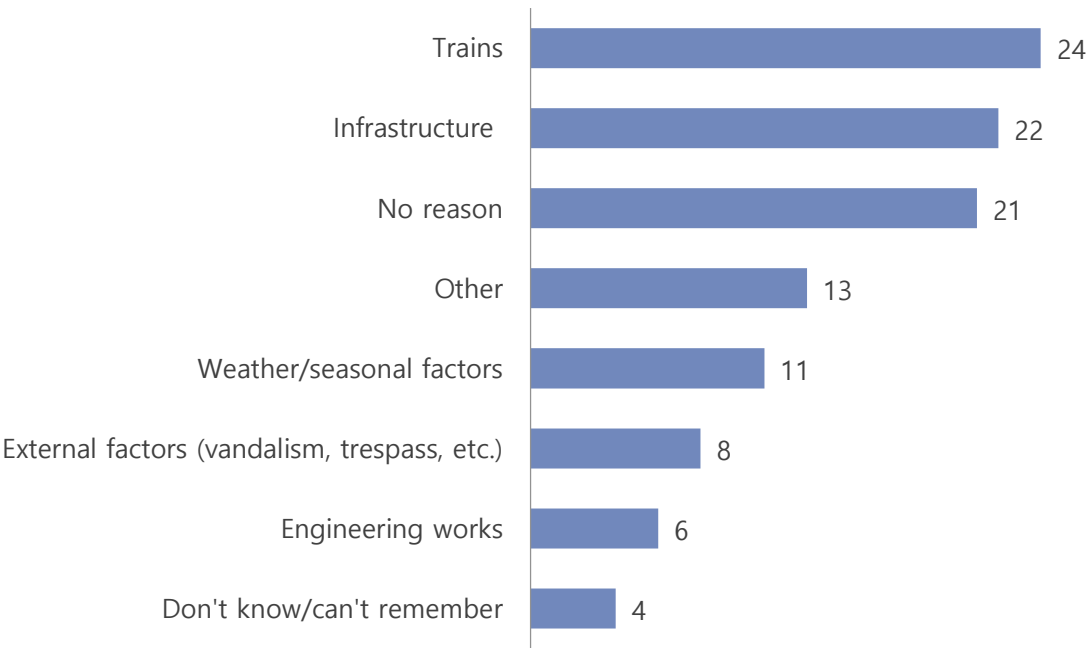
- The majority of participants (57%) first heard about the disruption at the station
- Trains and infrastructure were cited as the most common reasons given for disruption at 24% and 22% respectively
- Just over 2 out of 5 respondents were not given a reason for the disruption they experienced

Oct-Dec 19: When first heard about the disruption (%)



■ Before arrival ■ At the station ■ On the train ■ At interchange

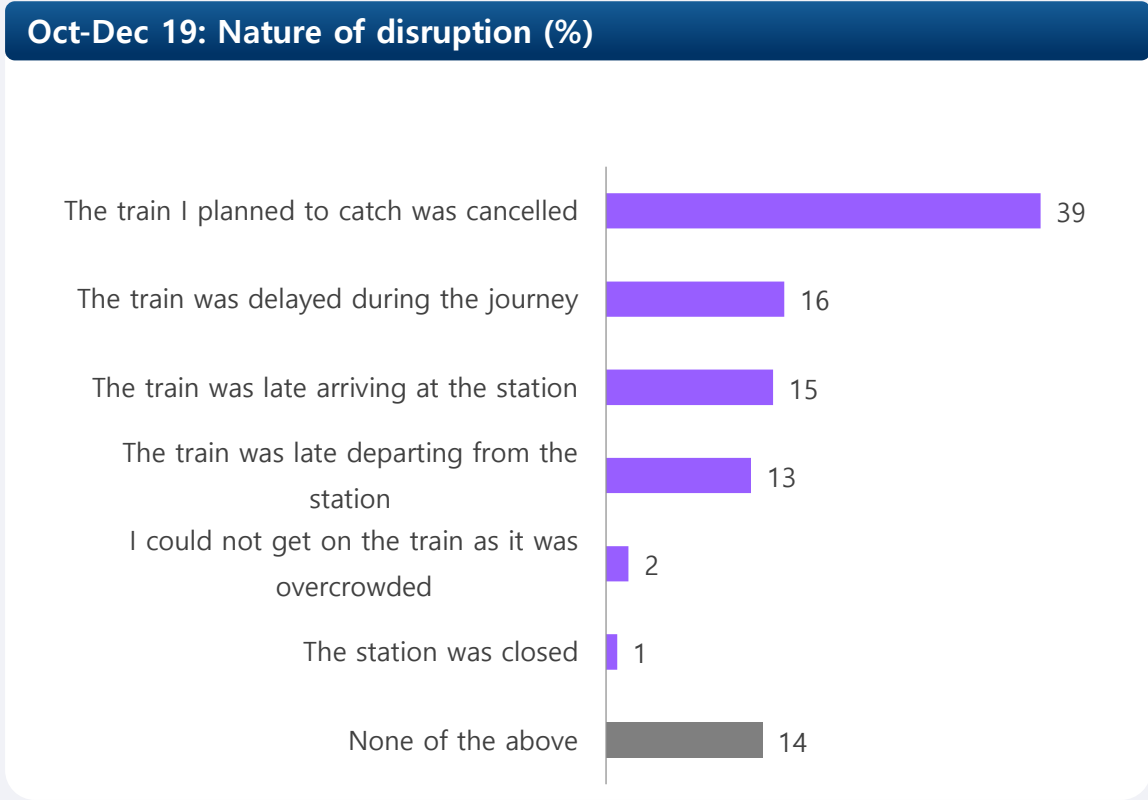
Oct-Dec 19: Reason given for disruption (%)



When were you first aware of a possible #DISRUPTION# to your train journey? / What was/were the reason(s) given for the #DISRUPTION#?
Base: 3,567

Nature of disruption

- Similarly to the last wave, 2 out of 5 respondents had a train cancelled. This is not a reflection of actual cancellation statistics but of the respondent profile and the disruption they experienced.
- The month with the highest number of respondents with cancelled trains is December with 42%, compared to 40% in October and 36% in November



Oct-Dec 19: Nature of disruption by month (%)

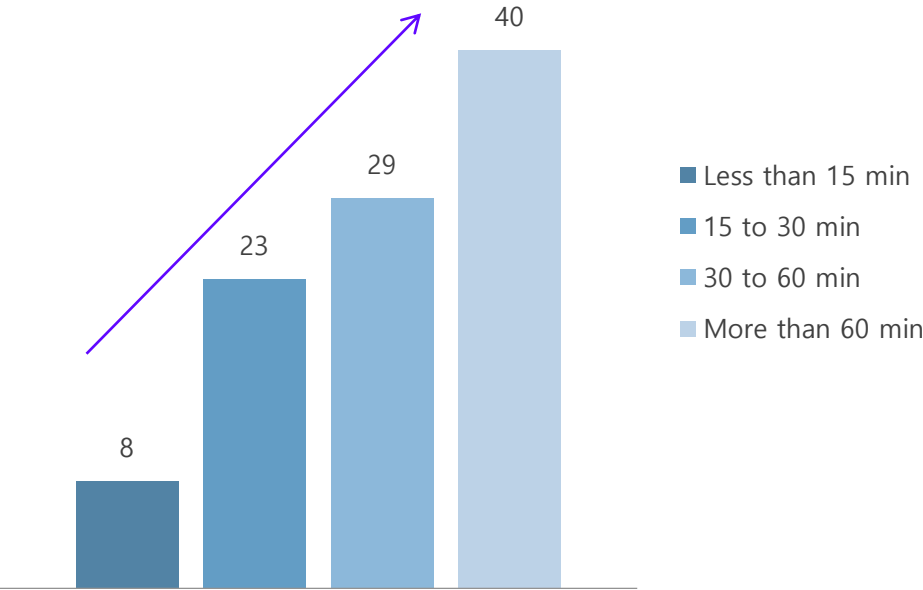
	October	November	December
The train I planned to catch was cancelled	40	36	42
The train was delayed during the journey	17	17	14
The train was late arriving at the station	14	17	14
The train was late departing from the station	12	14	13
The station was closed	2	1	1
I could not get on the train as it was overcrowded	2	2	3
None of the above	14	14	13

Which of the following best describes the nature of the #DISRUPTION#?
Base: 3,567; October 1,084; November 1,239; December 1,244

Disruption length

- The length of delays remained stable this wave reaching more than 60 min for more than two fifths of respondents. Again, this does not reflect actual delay statistics

Oct-Dec 19: Length of delay (%)



Oct-Dec 19: Length of delay by month (%)

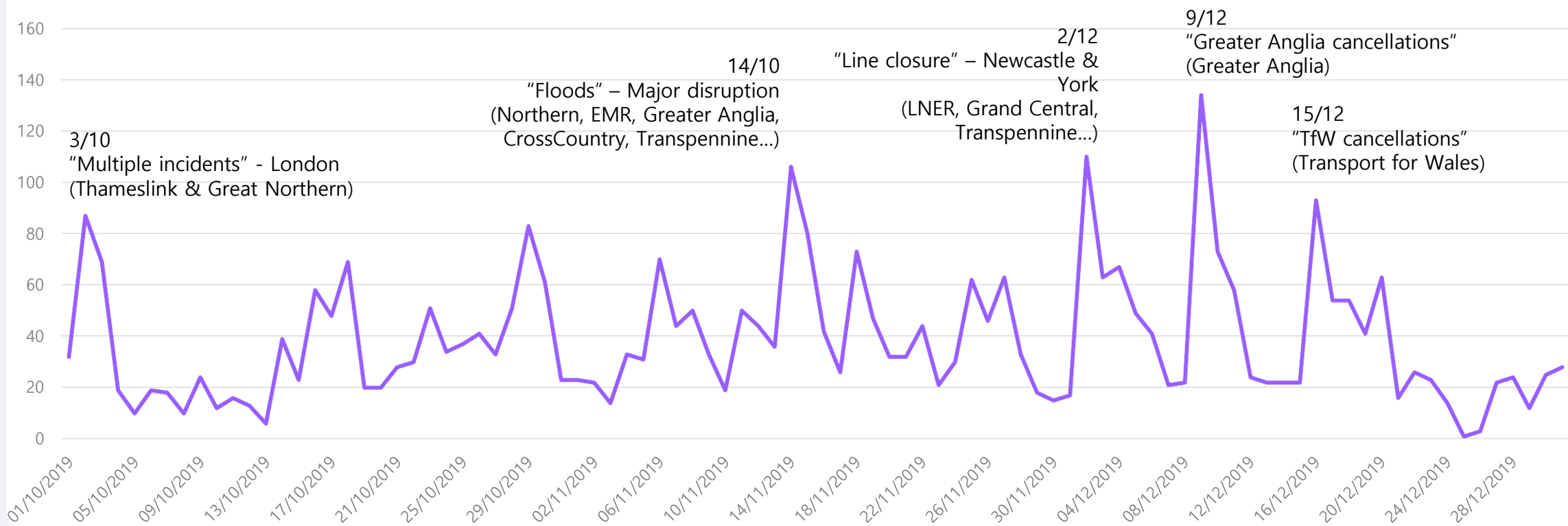
	October	November	December
Less than 15 min	9	6	8
15-30 min	22	22	25
30 - 60 min	30	31	30
More than 60 min	39	41	36

How late were you arriving at your destination station? If you don't remember please enter your best estimate. Base 2,269; October 718; November 794; December 757

Timeline – survey participation

- The timeline of participation is closely connected to when disruptions happen. The cancellations for Greater Anglia in December are linked to the peak in participation this quarter

Oct-Dec 19: Survey completion timeline



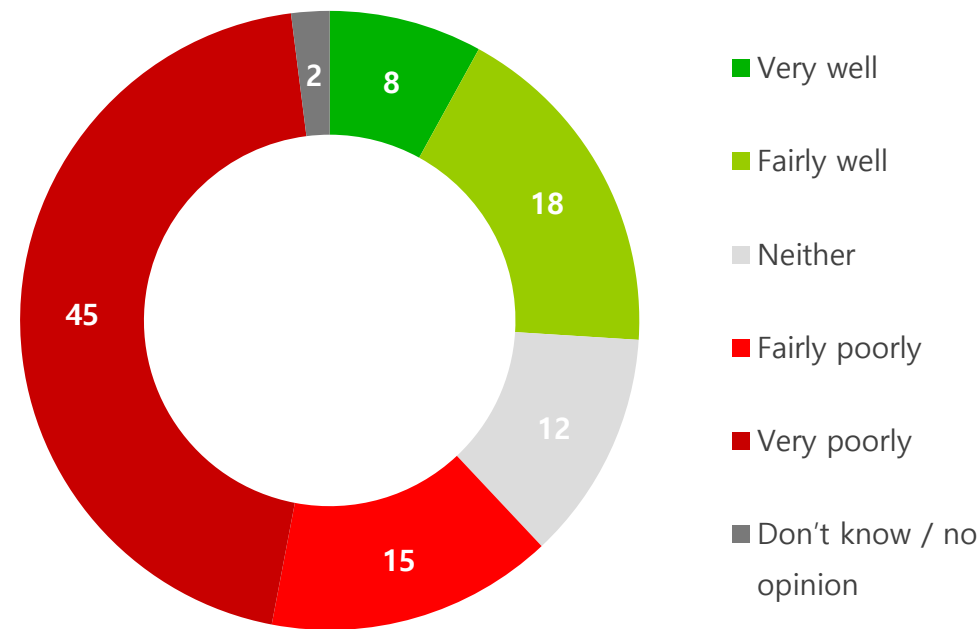
Satisfaction with information provision



Dealing with delay/cancellation

- Satisfaction with the way TOCs dealt with the disruption is stable at 25% which is 12% pts higher than last year

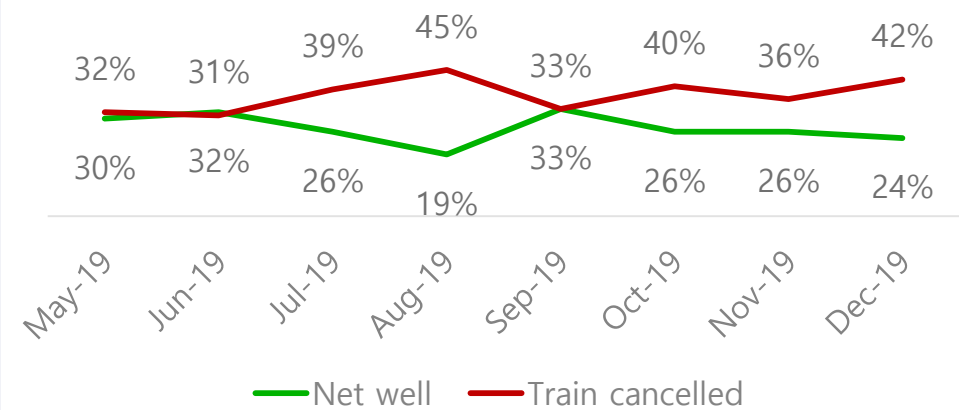
Oct-Dec 19: How well TOCs deal with delay/cancellation (%)



Net well (very/fairly well)

25%
(+12% vs. last year)

Monthly trend (%)



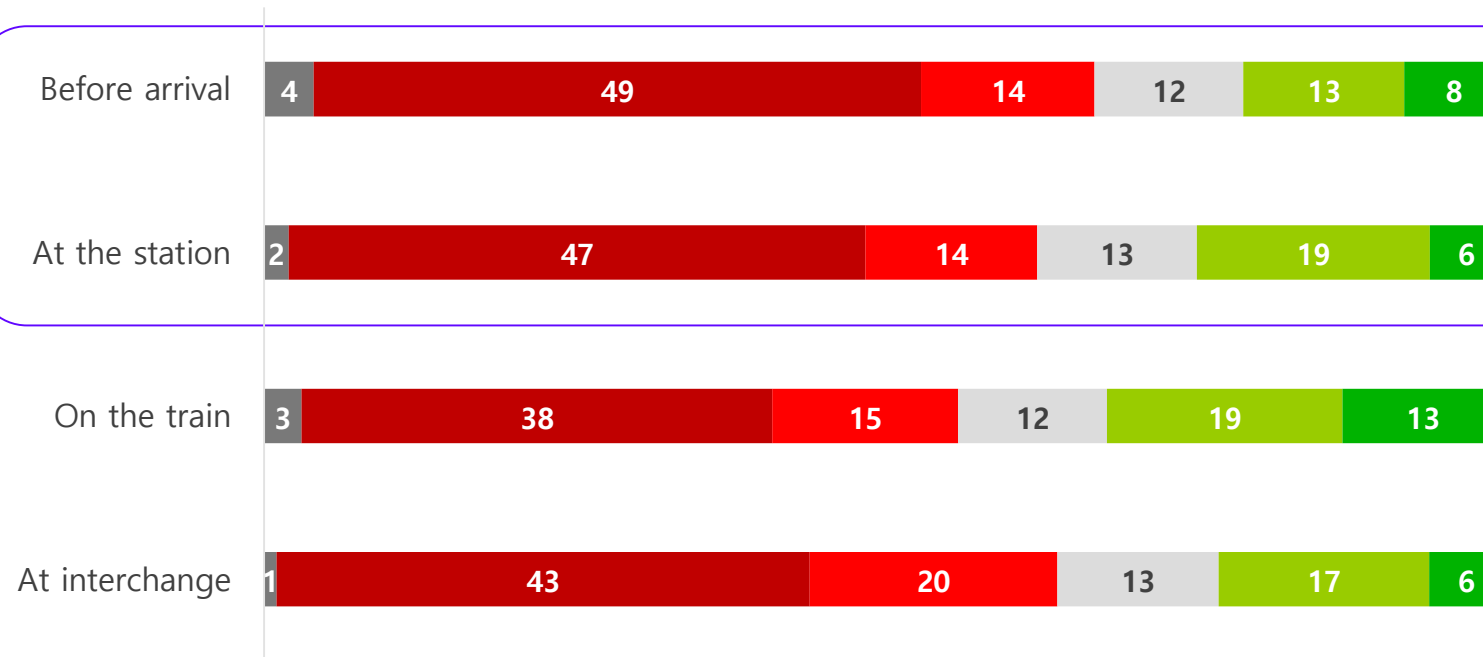
Overall, how well do you think the train company dealt with this delay? / Which of the following best describes the nature of the #DISRUPTION#?
Base 3,567; May 410; Jun 715; July 1,023; August 559; September 690; October 1,084; November 1,239 ; December 1,244

Dealing with delay/cancellation by journey stage

- The lowest satisfaction scores are 'before arrival' and 'at the station'
- 'On the train' records the highest level of overall satisfaction with 32% of respondents stating that their delay/cancellation was dealt with fairly or very well

Oct-Dec 19: How well TOCs deal with delay/cancellation by journey stage (%)

■ Don't Know/No opinion ■ Very poorly ■ Fairly poorly ■ Neither ■ Fairly well ■ Very well



Net well (fairly/very well)

Before arrival **21%**

At the station **25%**

On the train **32%**

At interchange **23%**

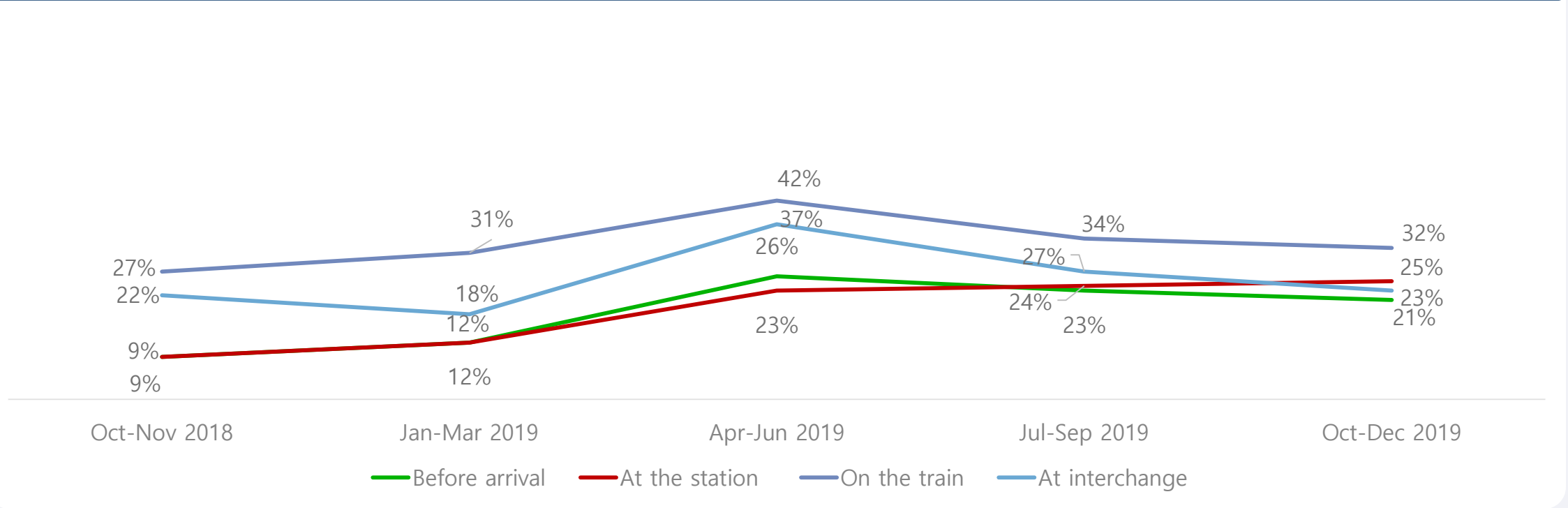
Overall, how well do you think the train company dealt with this delay?

Base 3,567; Before arrival 712; At the station: 2,046; On the train 668; At interchange 141

Trend – dealing with delay/cancellation by journey stage

- As in previous waves, the trend of satisfaction by journey stage reveals that before arrival and at the station scores are almost identical
- 'At the station' has achieved its highest level of satisfaction in Oct-Dec 19 at 25%

Waves 11-15: How well TOCs deal with delay/cancellation by journey stage (%)

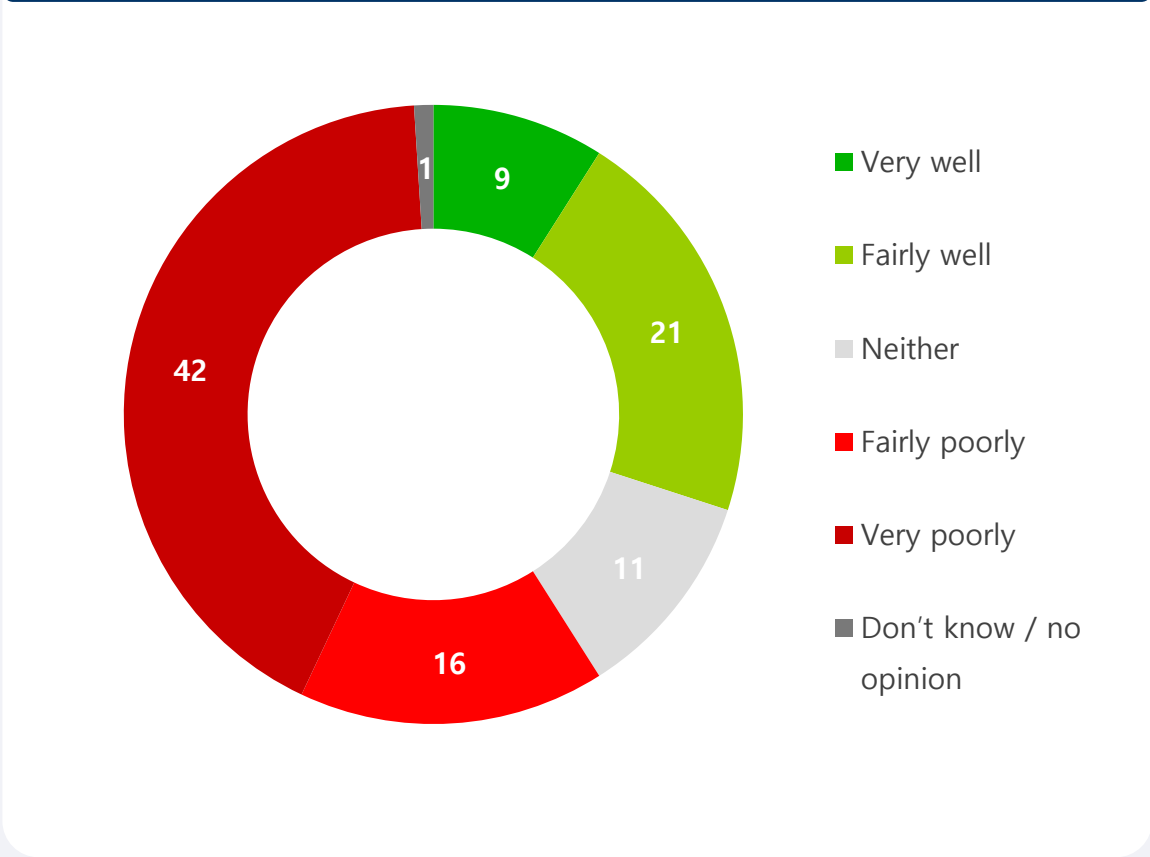


Overall, how well do you think the train company dealt with this delay?
Base 3,567; wave 14 2,272; wave 13 1,380; wave 12 1,288; wave 11 2,010

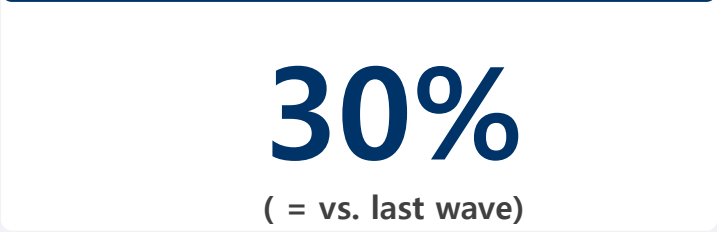
Keeping passengers informed

- Satisfaction with how TOCs kept passengers informed are equal wave on wave
- Satisfaction is closely linked to cancellations. December recorded the highest number of cancellations in the wave at which point satisfaction is at its lowest

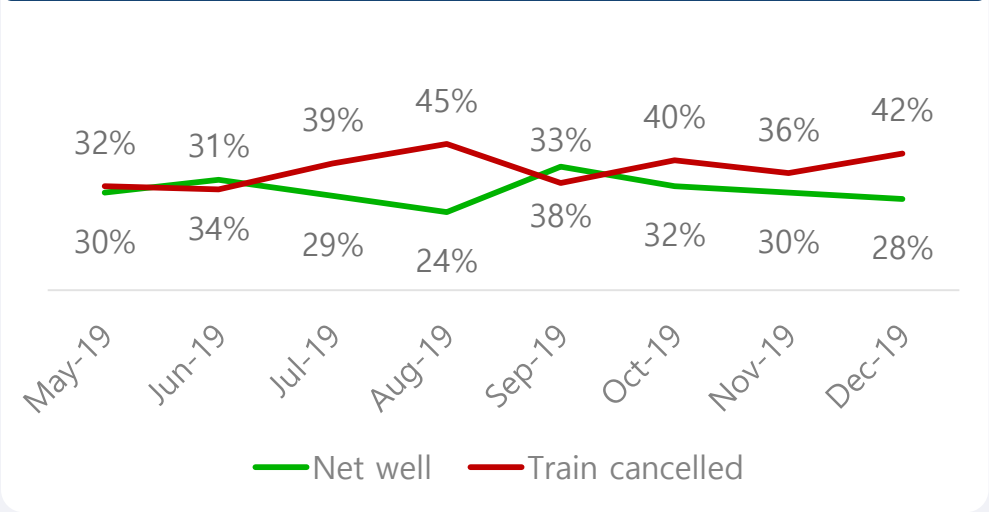
Oct-Dec 19: How well passengers are kept informed (%)



Net well (very/fairly well)



Monthly trend (%)



Overall how well do you think the train company kept you informed about the delay or cancellation? / Which of the following best describes the nature of the #DISRUPTION#?
Base 3,567; May 410; Jun 715; July 1,023; August 559; September 690; October 1,084; November 1,239 ; December 1,244

Reasons for satisfaction on information provision

- When asked why they are satisfied with the information provision, passengers particularly recognise staff as giving them thorough updates and information around refund procedures

Oct-Dec 19: Reasons for satisfaction on how well passengers are kept informed



"The information provided at the time of the incident was very thorough and gave perspective"

"The train conductor was kind and apologised for the train malfunctioning, while it wasn't something he could control."

"They try their best especially the front line staff keeping people informed and apologising"

"The train manager gave regular updates during the journey, and also gave out, and collected, compensation forms to ensure that we were refunded as soon as possible. We were also given free tea and coffee!"

"I am from the United States. I was so impressed with Cross Country because we received a refund since our train was more than 60 minutes delayed. If you were in the US and took Amtrak, I don't think there would be any compensation at all"

What is the primary reason for that score? Please type in and be as specific as possible.

Reasons for dissatisfaction on information provision

Oct-Dec 19: Reasons for dissatisfaction on how well passengers are kept informed



- Passengers are dissatisfied with information provided when alternative routes are not offered
- Passengers are also dissatisfied when information given is inconsistent, e.g. when trains are actually running but the correct information is not online, or when no bus replacement is provided contrary to what they have been told

"Information too generic and fails to give adequate alternatives. Passengers need specific information in order to make informed decisions e.g. alternative routes"

"No apology offered. No proper advice about likelihood of replacement bus or time to complete journey. Didn't know whether to buy a ticket and wait around for replacement bus. In the end I cancelled my trip"

"I feel information should have been given on the platform as to reason for the cancellation and alternative travel (i.e. get the next train to Doncaster then Hull Trains to Beverley). Instead I had to go to the Info Desk on the other side of the station"

"Disagreement between TFW advising passengers not to travel and National Rail showing services running to time! I had no confidence in trying to travel following bad information about disrupted travel a few weeks ago for which I am still waiting for compensation"

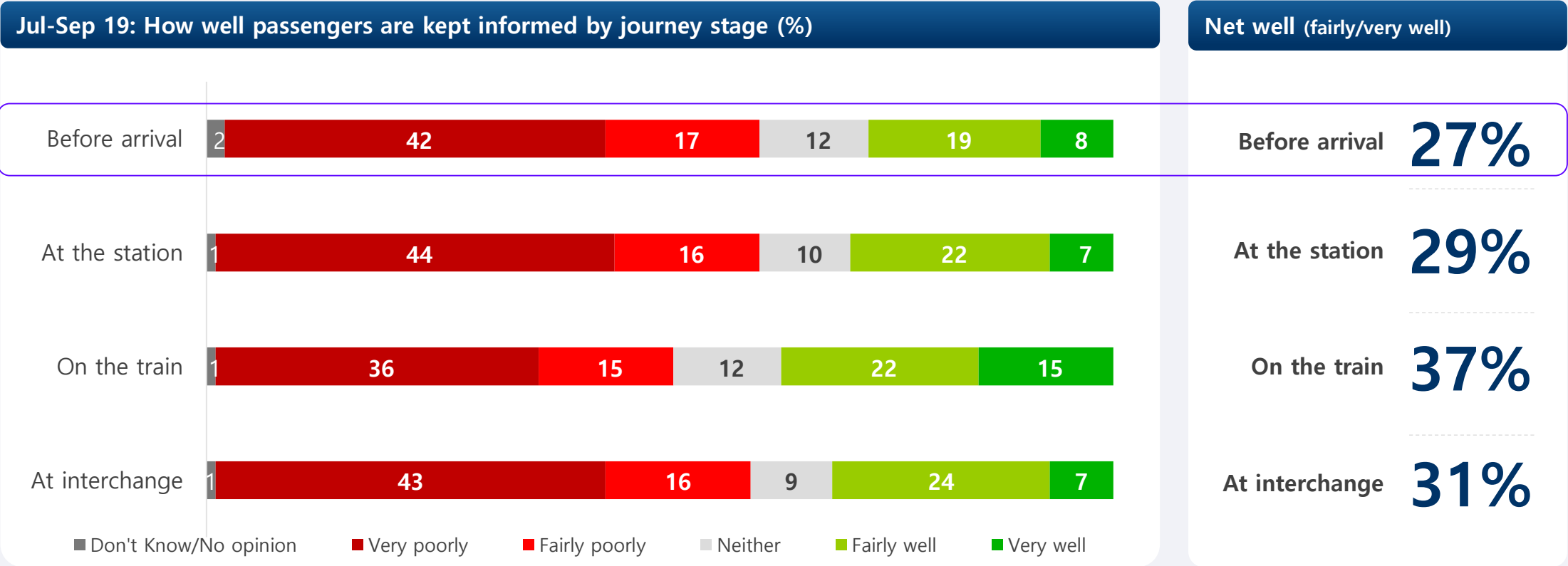
"Lack of information; inconsistent information given; inaccurate information given about further connections which would have caused an additional delay if I hadn't checked online for myself"

"There was actually no disruption at all yet the app and webpage continued to say no service beyond Oxted which led to some people organising being picked up at Oxted. I'm guessing that the vandalised train was removed and things returned to normal quicker than expected"

What is the primary reason for that score? Please type in and be as specific as possible.

Keeping passengers informed by journey stage

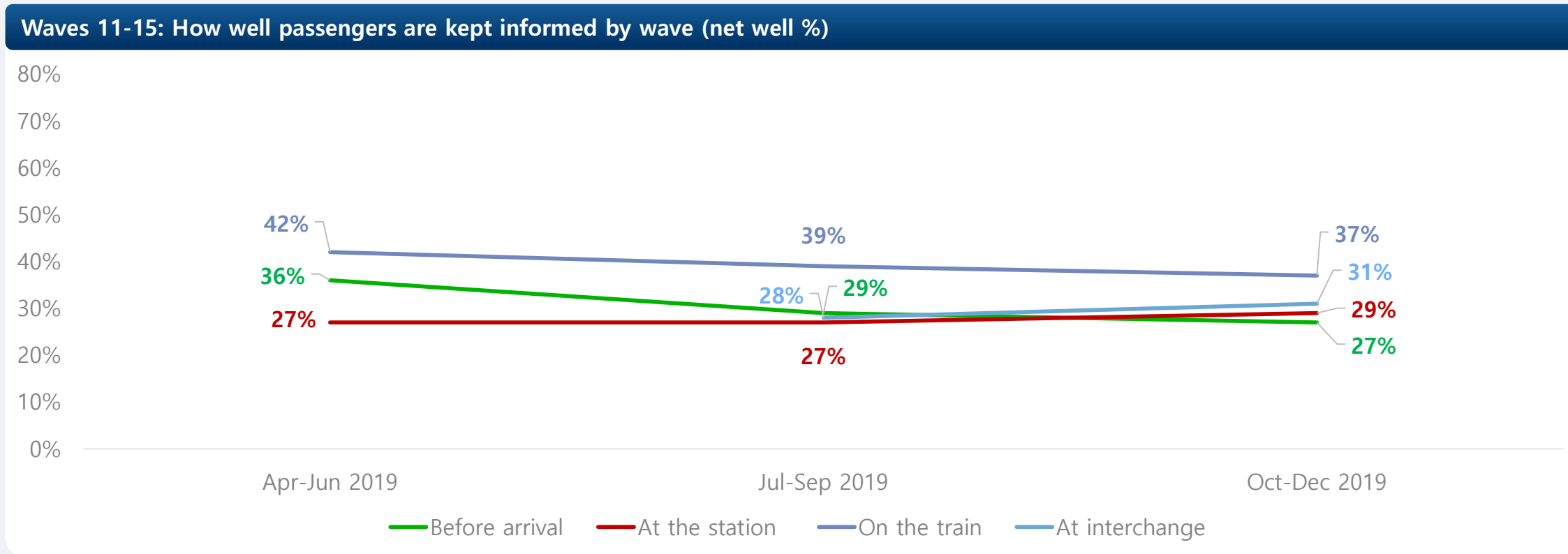
- Keeping passengers informed on the train is the journey stage where TOCs perform best
- At the station and before arrival are the stages where satisfaction is particularly low and improvements can and need to be made



Overall how well do you think the train company kept you informed about the delay or cancellation?
Base 3,567; Before arrival 712; At the station: 2,046; On the train 668; At interchange 141

How well kept informed – wave trend

- Satisfaction with information provision has been going down consistently for the past three waves for passengers aware of the disruption before they arrived at the station



Overall how well do you think the train company kept you informed about the delay or cancellation?
Base 3,567; wave 14 2,272; wave 13 1,380; wave 12 1,288; wave 11 2,010

- Train cancellations are closely correlated with passengers' satisfaction before arrival and at the station.

The chart displays the percentage of passengers in different stages of their journey from May 2019 to December 2019. The stages are 'Before arrival' (blue), 'At the station' (green), and 'On the train' (dark blue). A dotted red line indicates 'Train cancelled' status. A purple box highlights the period from October 2019 to December 2019, where the 'Train cancelled' status is consistently high.

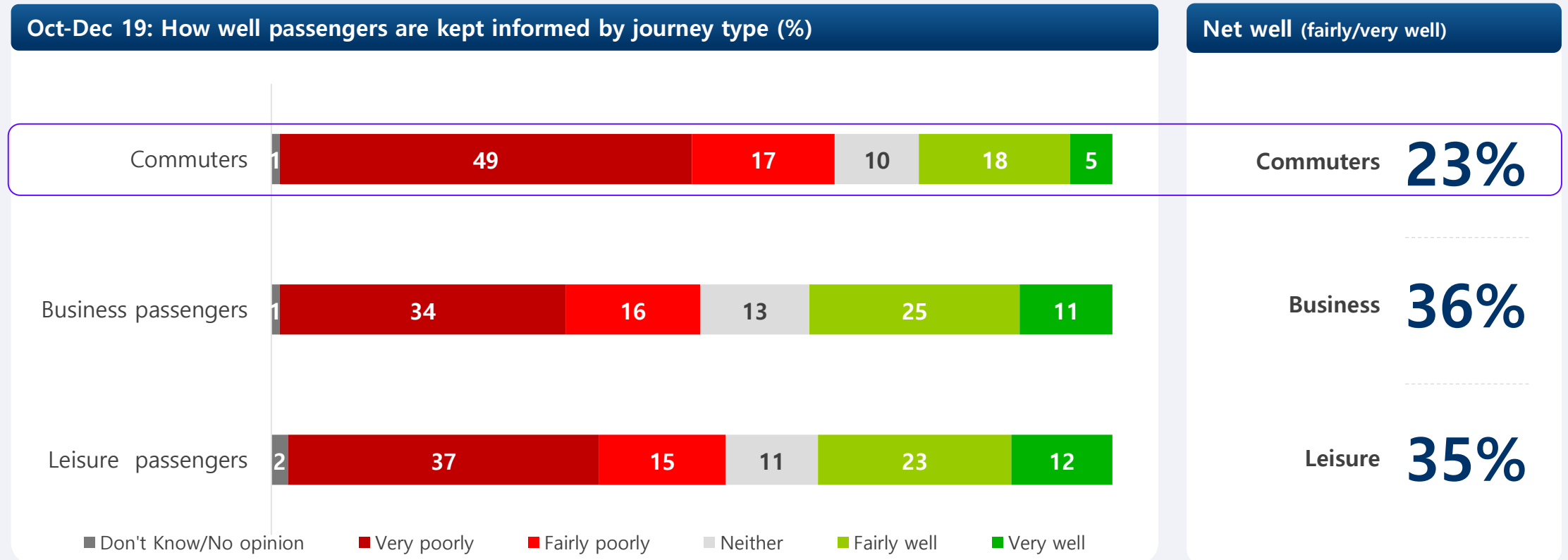
Month	Before arrival	At the station	On the train	Train cancelled
May-19	22%	22%	46%	22%
Jun-19	45%	30%	39%	22%
Jul-19	26%	28%	33%	33%
Aug-19	23%	17%	40%	40%
Sep-19	43%	35%	44%	43%
Oct-19	28%	31%	40%	40%
Nov-19	32%	28%	36%	36%
Dec-19	27%	29%	37%	37%

Rail Delivery Group

 National Rail

Keeping passengers informed by journey types

- Commuters continue to be the least satisfied with how TOCs kept them informed during disruption. This is not surprising as they are likely to be the most common users of rail travel

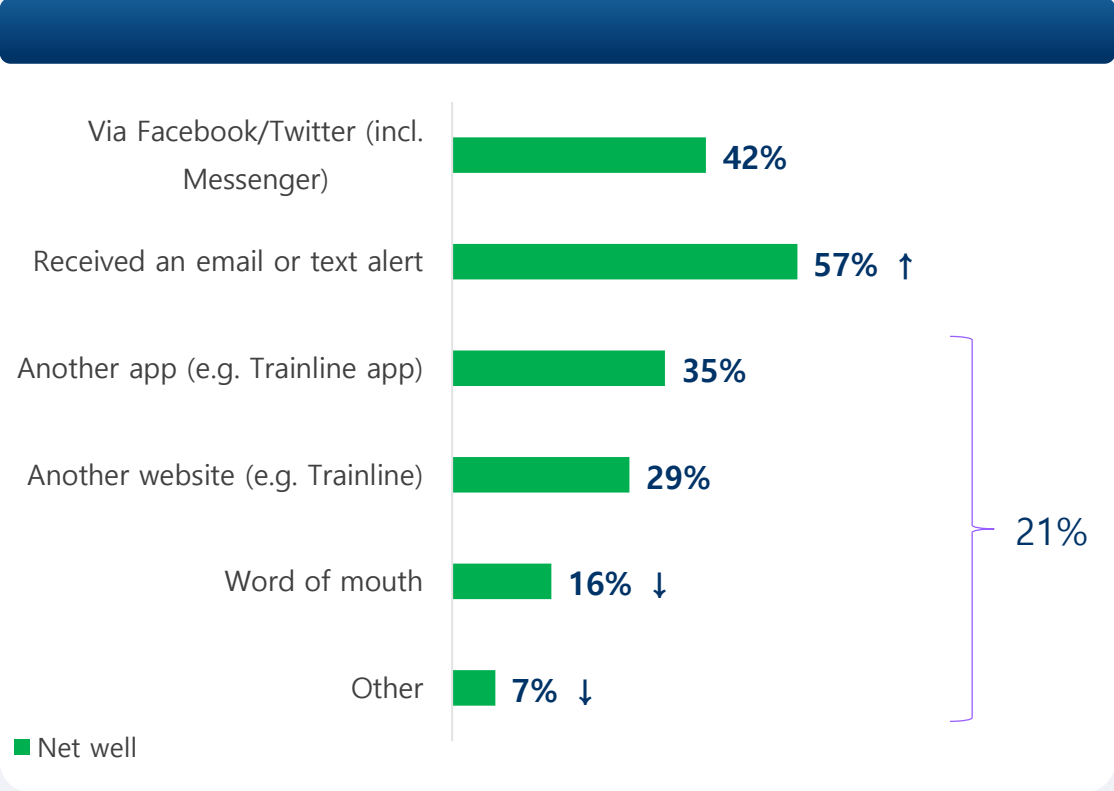
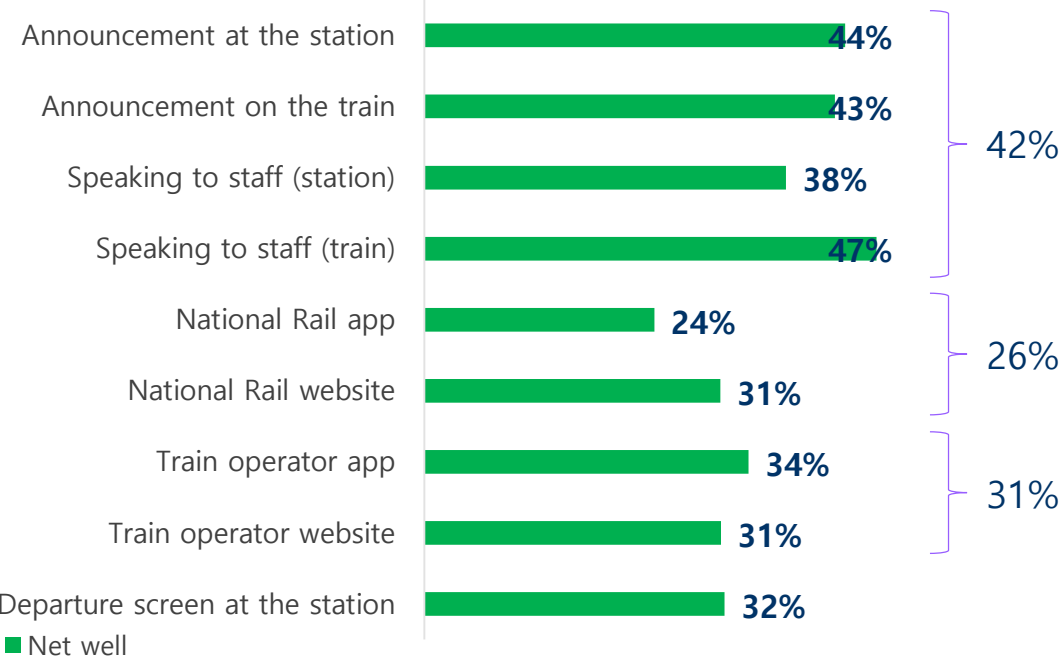


Overall how well do you think the train company kept you informed about the delay or cancellation?
Base 3,567; Commuter 1,566; Business: 415; Leisure: 1,586

Keeping passengers informed by information source

- To keep passengers well informed staff play a crucial role as they drive satisfaction up
- The NRE app is currently linked with lower satisfaction and probably needs some work to be at least as good as the TOCs' apps
- External sources of information (non NRE/TOC) perform weaker when it comes to information provision. Therefore encouraging passengers to check NRE/TOCs information sources is likely to drive overall satisfaction

Oct-Dec 19: How well passengers are kept informed by source (%)

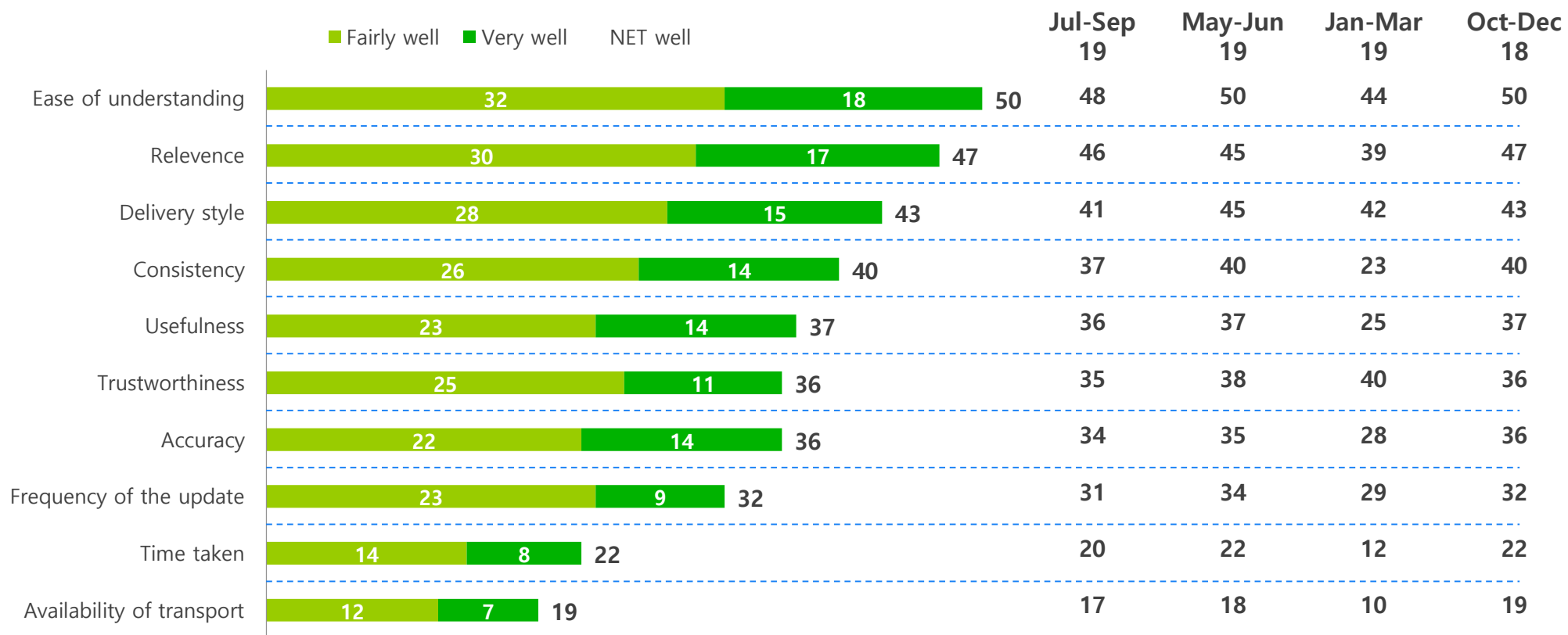


Overall how well do you think the train company kept you informed about the delay or cancellation?
Base varies n=72 to n=1358

Rating of information provided

- The majority of attributes increased this wave, reversing the trend we saw in Jul-Sep 19.
- Availability of alternative transport and time taken to resolve the problem have the lowest rating of information provided, 19% and 22% respectively

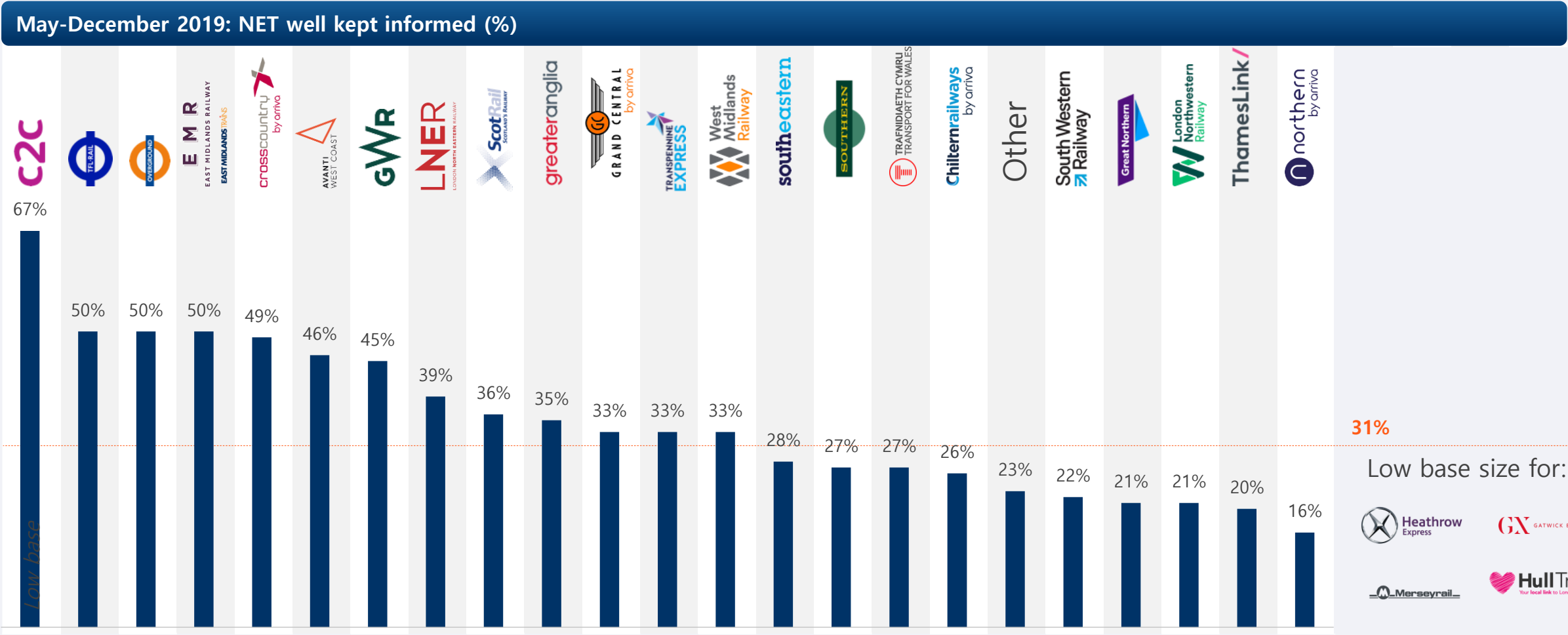
Oct-Dec 19: Rating of information provided (%)



How do you rate the train company for the following aspects of the information provided in relation to the disruption?
 Base 3,567; Jul-Sep19 2,272; May-Jun19 1,380; Jan-Mar19 1,288; Oct-Dec18 2,010

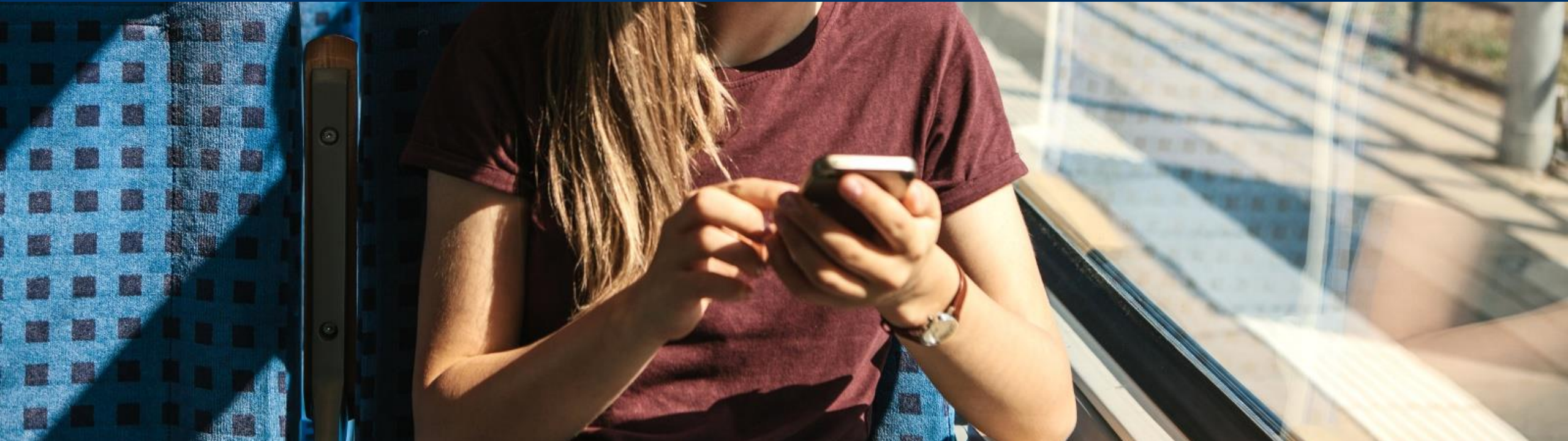
Ranking – how well passengers are kept informed

--- National average



Overall how well do you think the train company kept you informed about the delay or cancellation?

Understanding and improving – what matters the most



Understanding what drives passengers' satisfaction with how well TOCs keep them informed

To make findings from this study more actionable, key driver analysis has been conducted on the question 'Overall how well do you think the train company kept you informed about the delay or cancellation?'

This analysis shows which aspects of the information provided have the strongest relationships with high satisfaction.



Satisfaction on aspects on information provided

High satisfaction of information provision

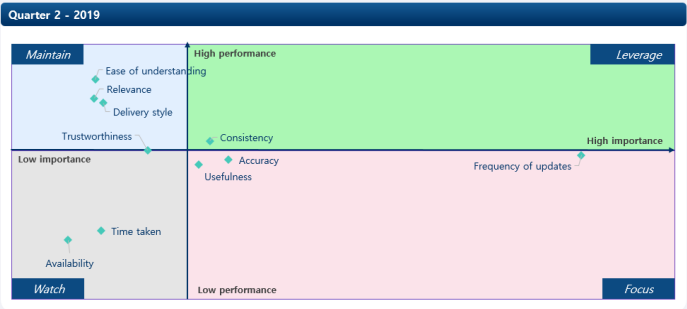
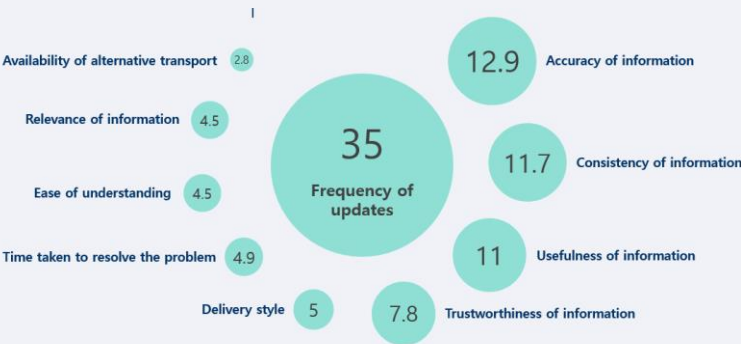


Understanding which attributes have a strong relationship with satisfaction enables train operators to identify priorities for improvement that will lead to more informed passengers during disruption, and increase satisfaction in the future

Example:

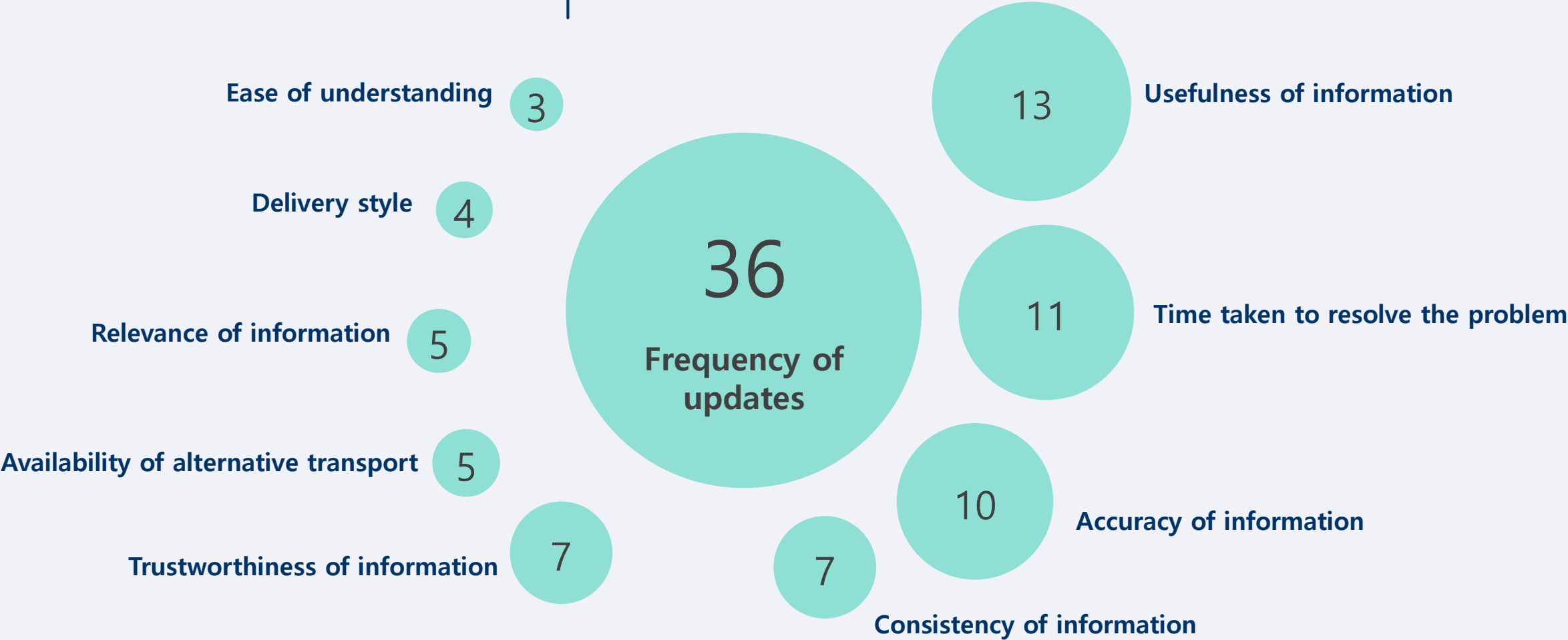
As shown by the bubble chart on the left below there are 10 attributes that drive satisfaction of information provision. The score and the size of the bubble indicate driver strength.

The map on the right puts the drivers into quadrants depending on their influence level and how the rail sector currently performs on each. The Focus and Leverage squares represent high influence levels on satisfaction of information provision. The sector performs less strongly on those placed in the Focus quadrant but performs well on those in Leverage. The Watch attributes have a lower impact on satisfaction of information provision and the sector performs not so well on them. But they need to be watched since they can become stronger drivers of satisfaction with information provision in the future. Maintain shows the attributes that also have a low satisfaction of information provision impact but on these the sector performs fairly strongly due to their position to the right of the chart. It is sensible to maintain the good performance on these attributes.



Key Driver Analysis*-overall

- Overall, the frequency of updates is the main driver for satisfaction with usefulness of information and time taken to resolve the problem following there after

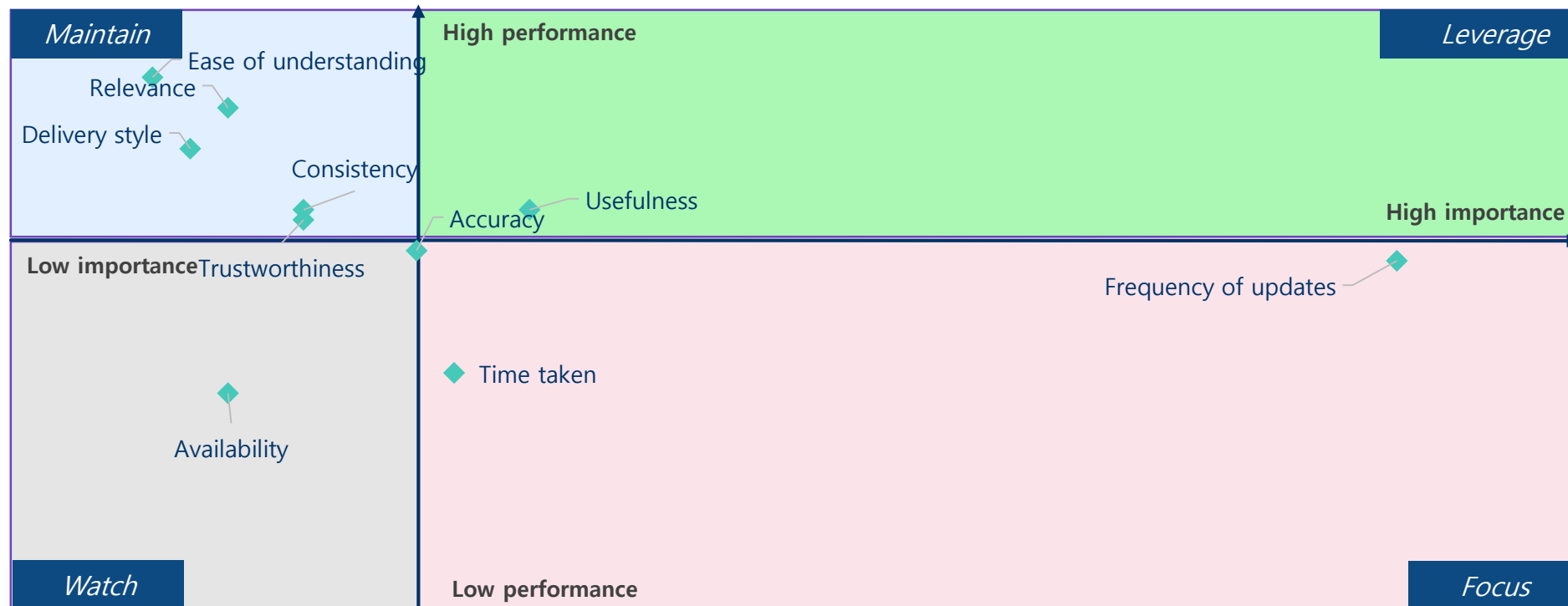


* Model explains 73% of variations

Key Driver Analysis - overall

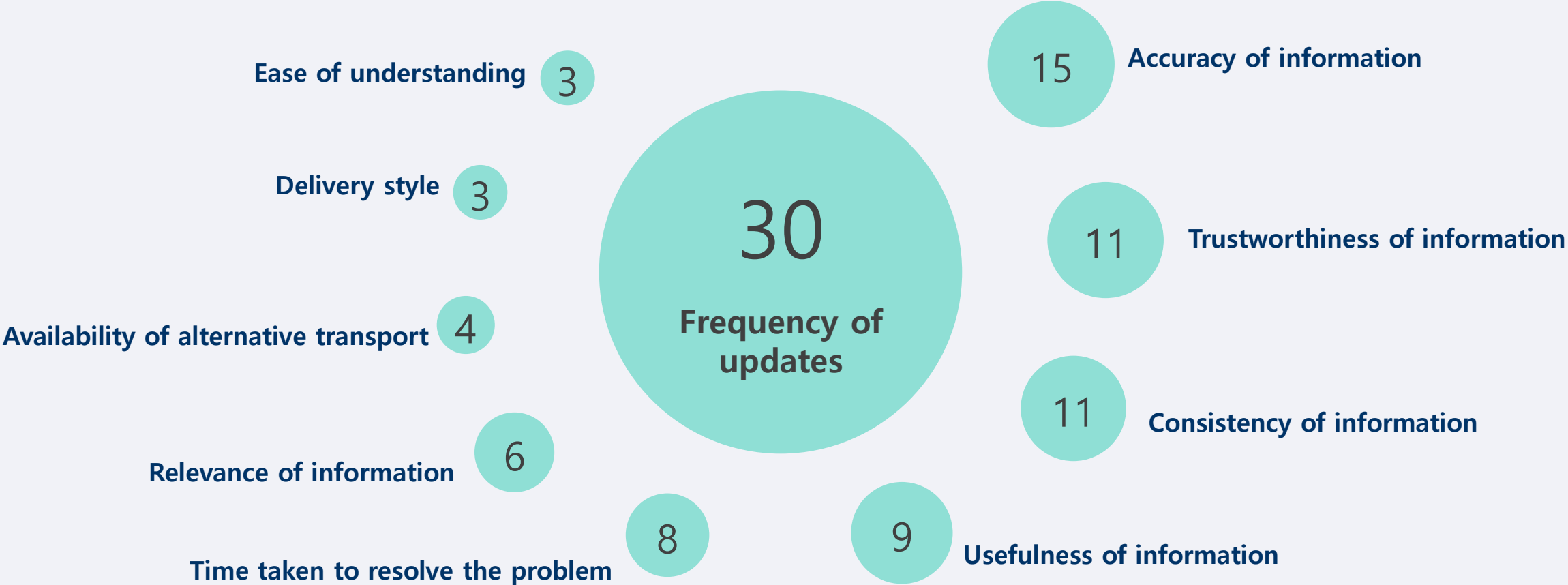
- There is little moment in the key driver analysis wave on wave
- TOCs need to focus on update frequency and accuracy of the information
- TOCs do relatively well on aspects that are seen as somewhat less important by passengers like ease of understanding, relevance and delivery style

Oct-Dec 19- 2019



Key Driver Analysis* - on the train

- The frequency of updates is the main driver for satisfaction for passengers on the train



* Model explains 81% of variations

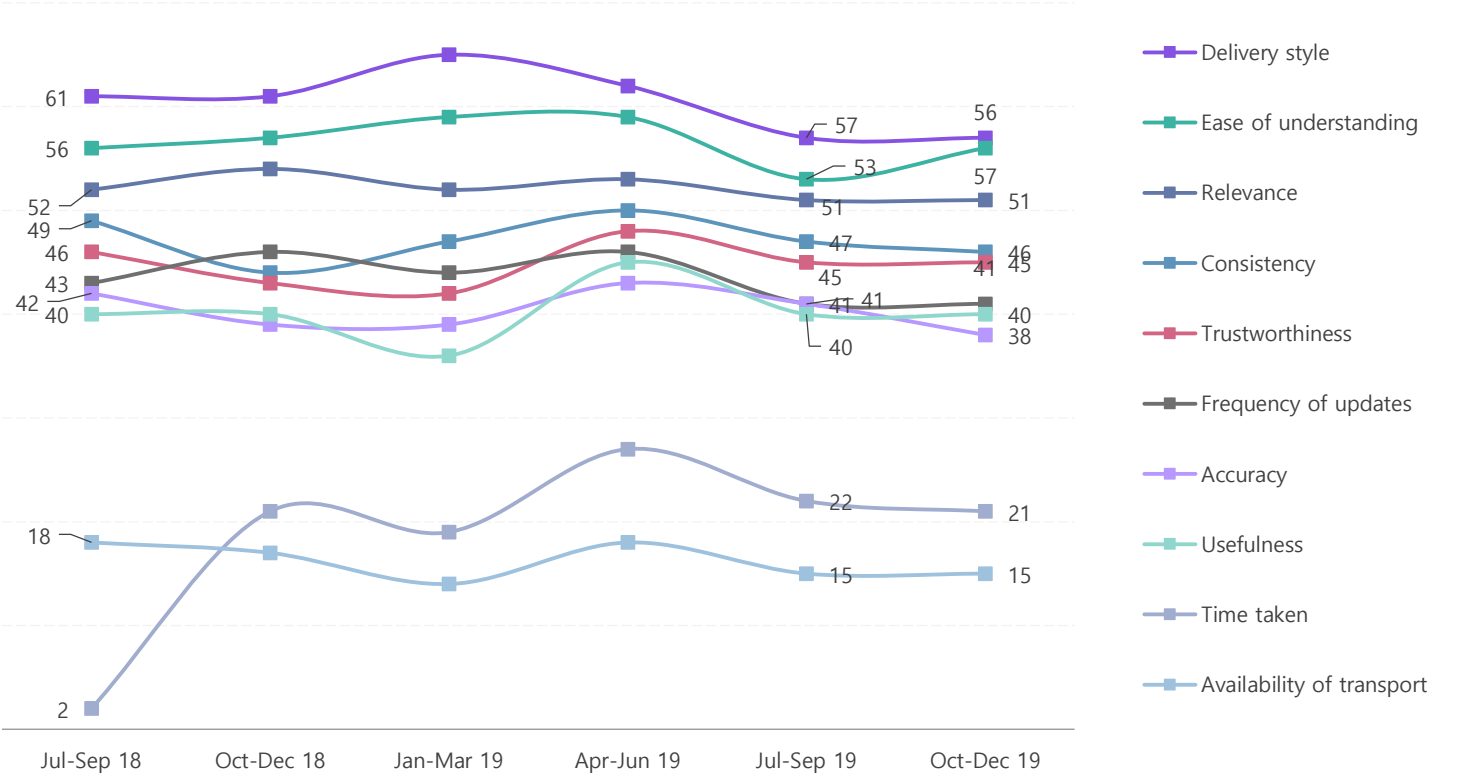
On the train – rating of information provision over time

- Most attributes have stayed stable this wave
- One attribute to show a more notable increase is 'ease of understanding' which has experienced a slight recovery after a dip in wave 13

On the train – rating of information (% net well)

	W15	% pts changes vs. W14
Delivery style	57	0
Ease of understanding	56	+3
Relevance	51	0
Consistency	46	-3
Trustworthiness	45	0
Frequency of the update	41	0
Usefulness	40	0
Accuracy	38	-3
Time taken	21	-1
Availability of transport	15	0

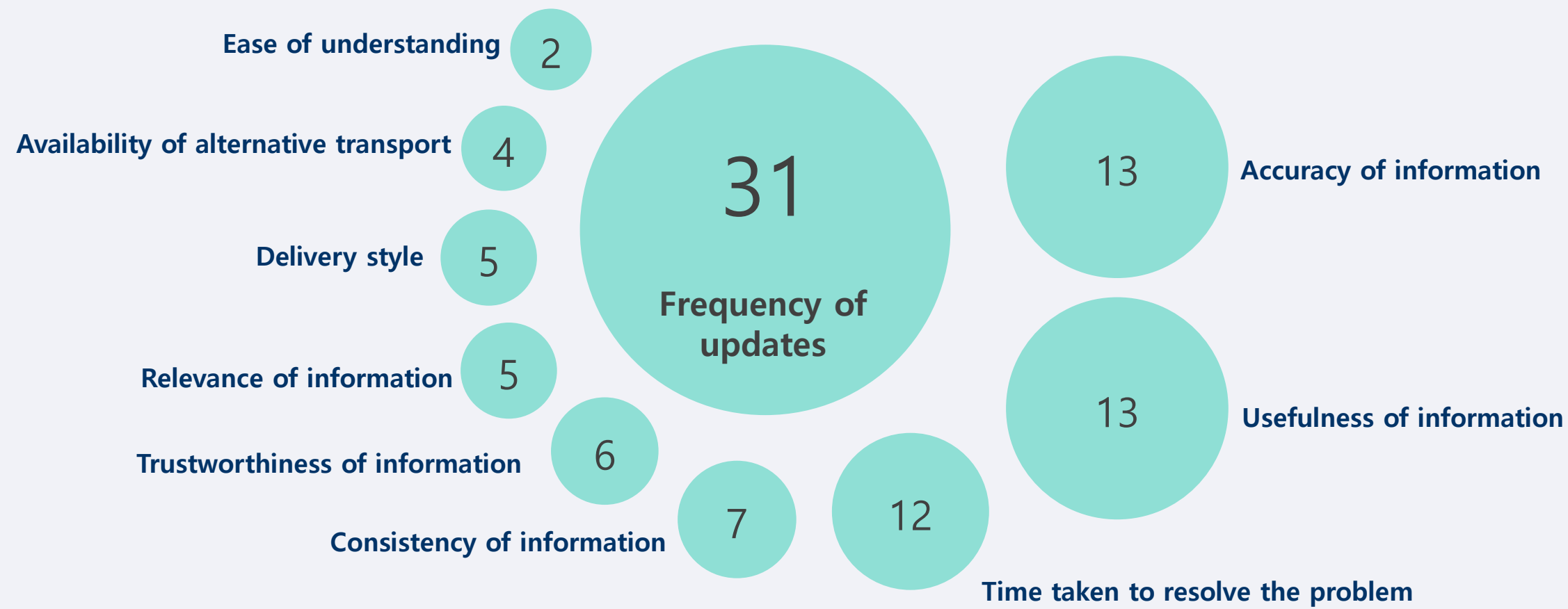
Waves 10-15: On the train – rating of information (% net well)



How do you rate the train company for the following aspects of the information provided in relation to the disruption?
Base 661

Key Driver Analysis* at the station

- At the station, frequency of updates is the main driver of satisfaction with accuracy of information and usefulness of information joint second



* Model explains 70% of variations

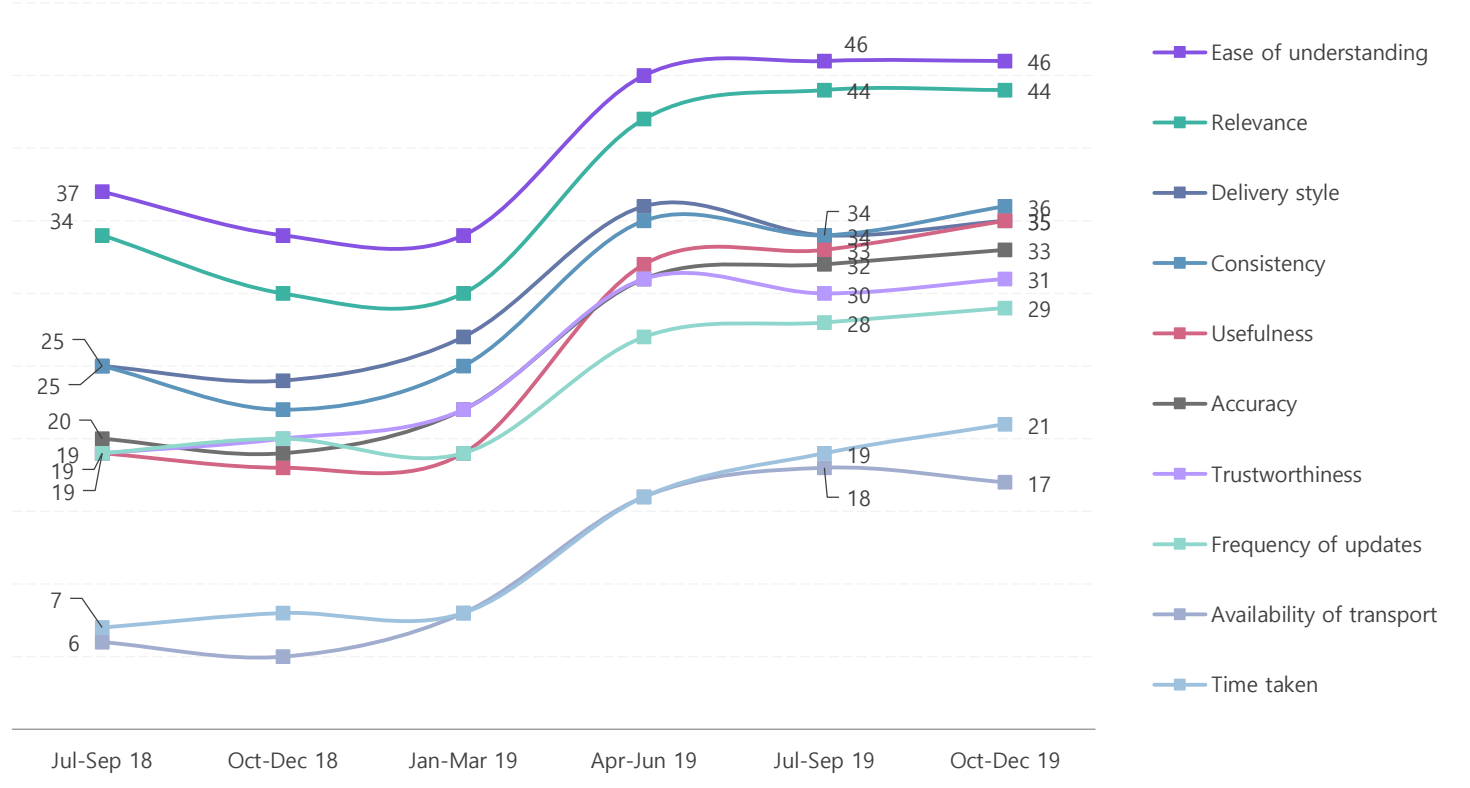
At the station – rating of information provision over time

- Continuing from what was seen in wave 14, most attributes have improved during wave 15 and are recording their highest scores in the past 12 months
- Availability of transport is the only attribute to go down this wave

At the station – rating of information (% net well)

	W15	% pts changes vs. W14
Ease of understanding	46	0
Relevance	44	0
Consistency	36	+2
Delivery style	35	+1
Usefulness	35	+2
Accuracy	33	+1
Trustworthiness	31	+1
Frequency of the update	29	+1
Time taken	21	+1
Availability of transport	17	-1

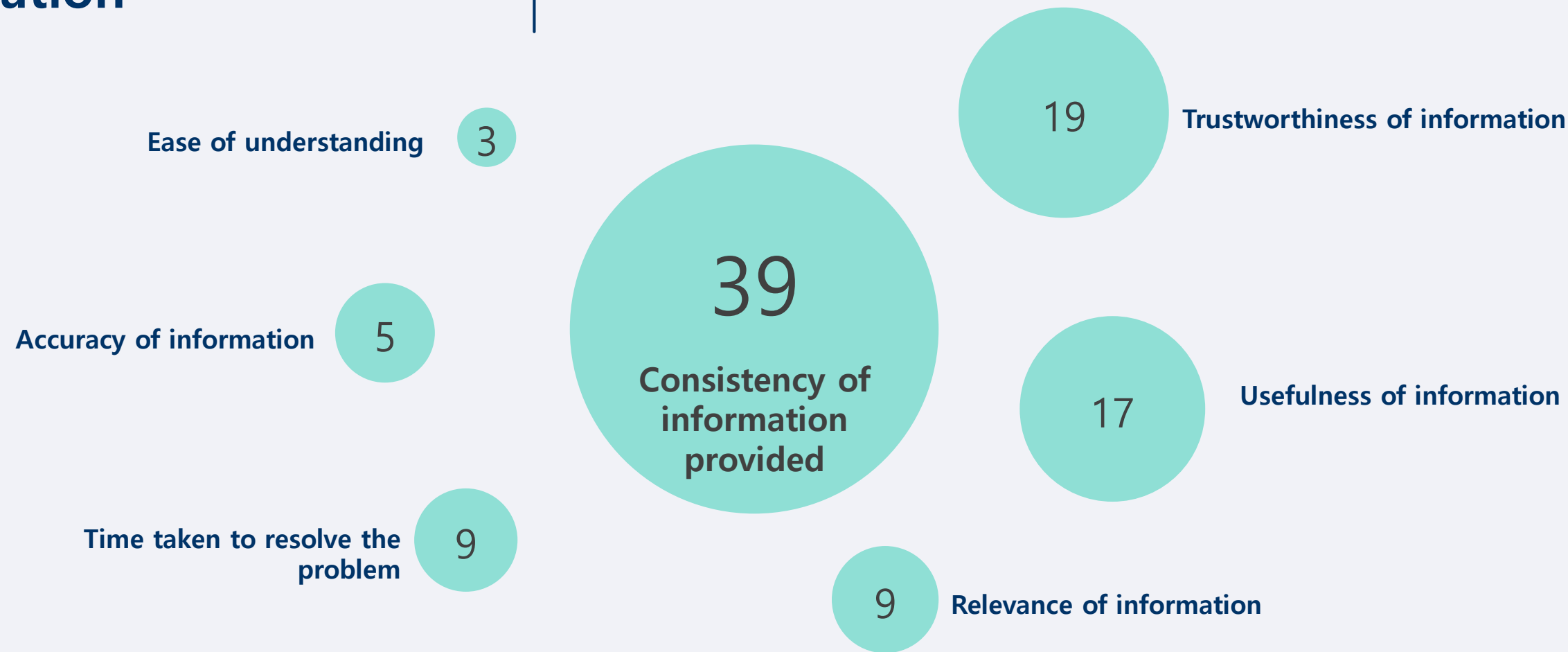
Waves 10-15: At the Station – rating of information (% net well)



How do you rate the train company for the following aspects of the information provided in relation to the disruption?
Base 2,037

Key Driver Analysis* - before arriving at the station

- By far the biggest driver of satisfaction for those passengers who find out about the disruption before getting to the station is providing consistent information



*Model explains 63% of variations

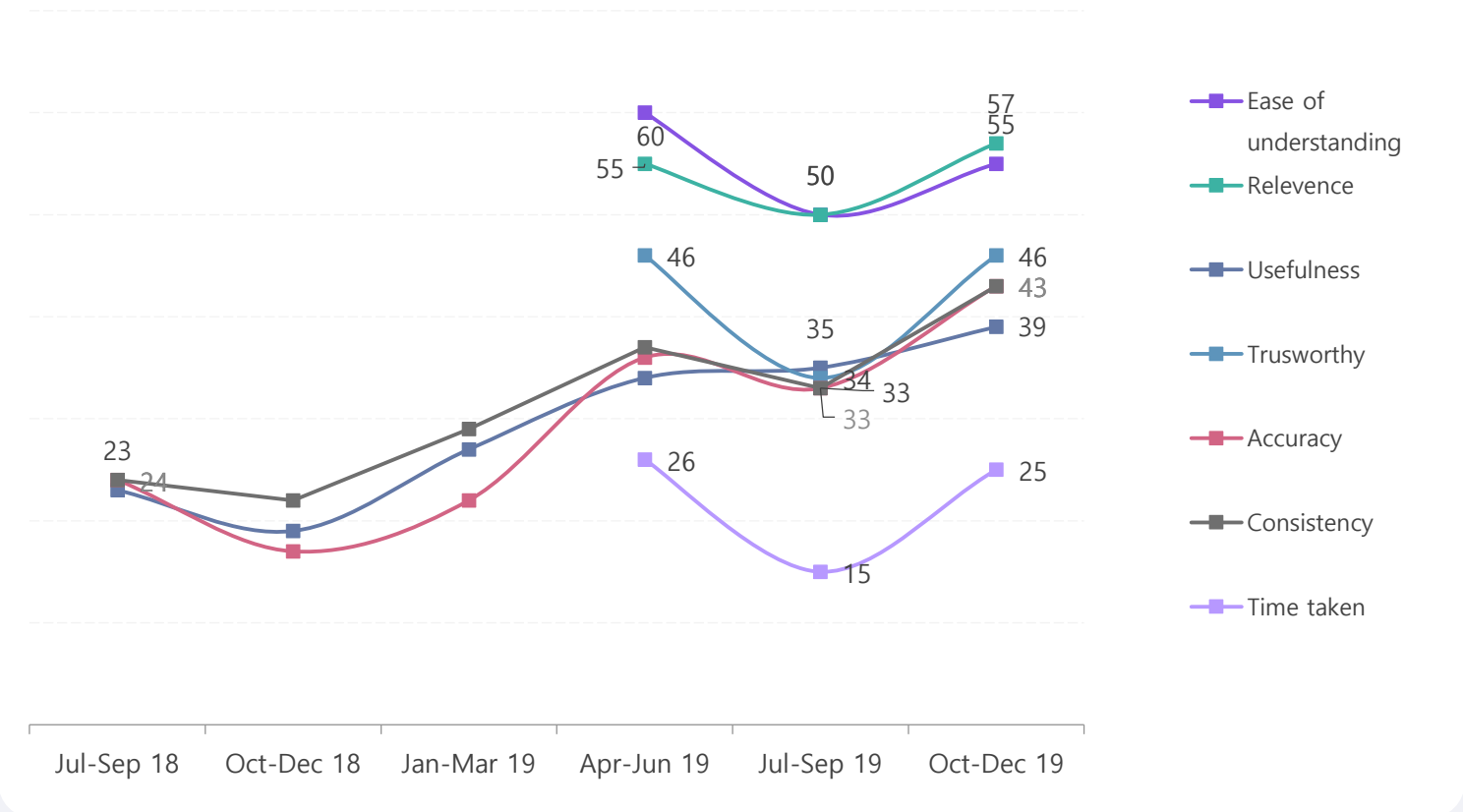
Before arrival at the station – rating of information provision over time

- For this journey stage scores on all attributes went up in wave 15
- The largest increases are recorded for trustworthiness, accuracy, consistency and time taken to resolve the problem

Before arrival at the station – rating of information (% net well)

	Oct-Dec 2019	% pts changes vs. Jul-Sept 19
Relevance*	57	+7
Ease of understanding*	55	+5
Trustworthiness*	46	+12
Accuracy	43	+10
Consistency	43	+10
Usefulness	39	+4
Time taken to resolve*	25	+10

Waves 10-15: Before arrival at the station – rating of information (% net well)



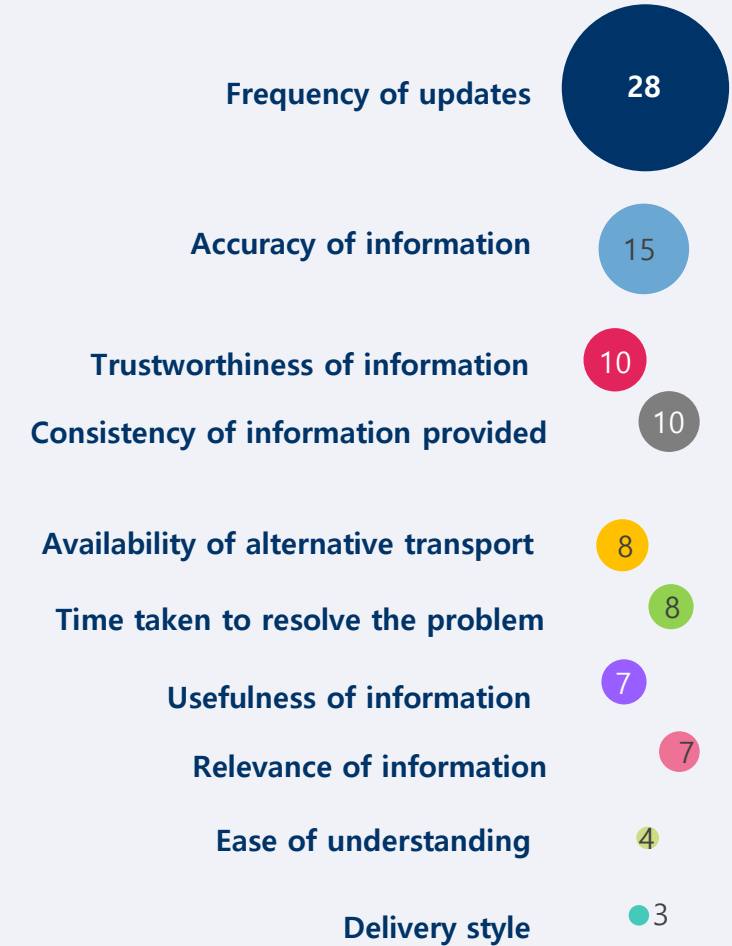
How do you rate the train company for the following aspects of the information provided in relation to the disruption?
Base: 182

*Items introduced in May 2019

Key Driver Analysis - by nature of disruption

- The main key drivers for when a train is cancelled are more in line with key drivers overall, whereas when trains are delayed and during other disruptions other key drivers become more prominent (e.g. accuracy and trustworthiness of the information)

Train delayed - KDA



Train cancelled - KDA



Other disruptions* - KDA



* Other disruptions: Overcrowding, Station closed, Other

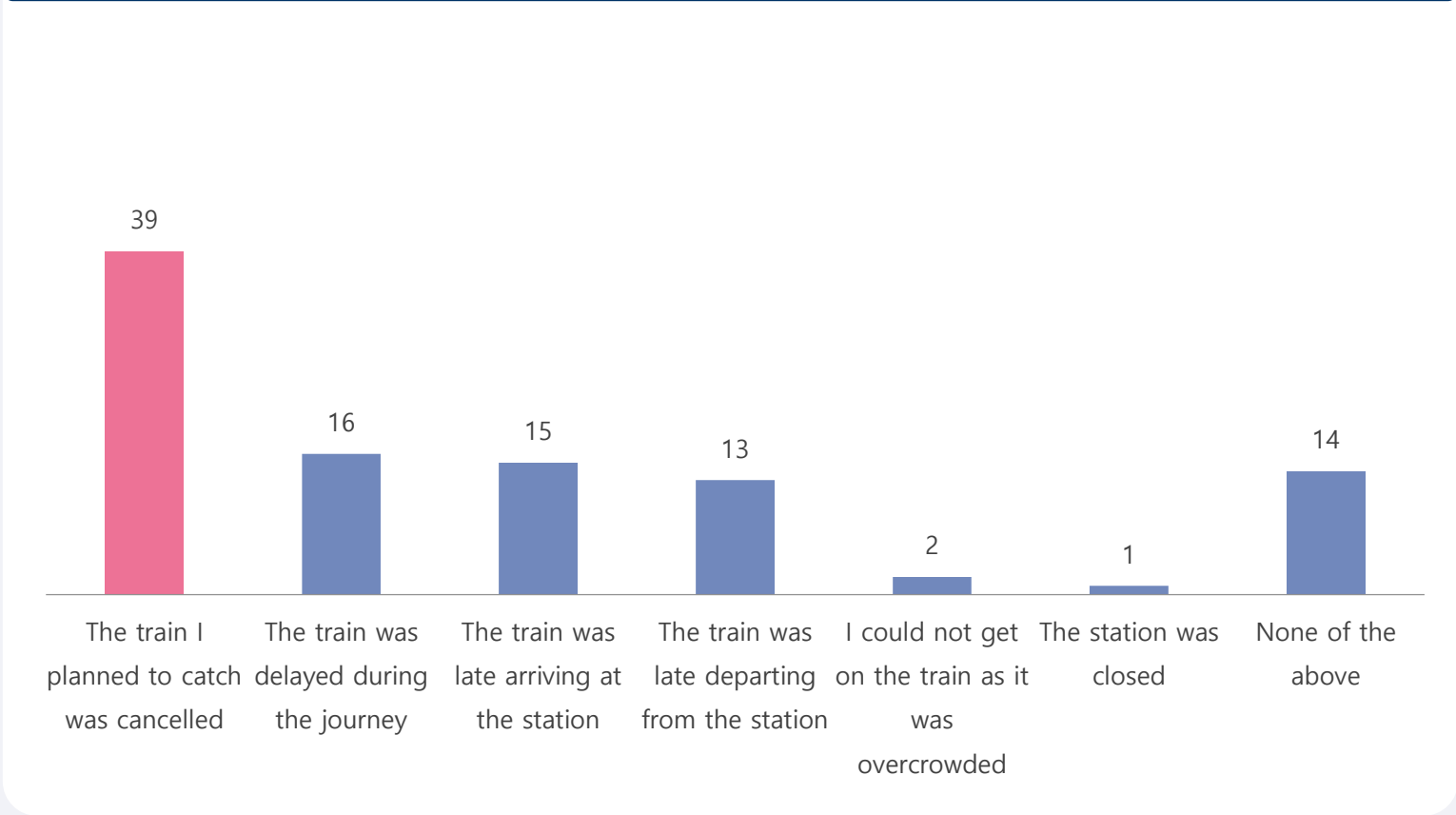
Train cancellations – a priority for better information



Nature of disruption

- During Oct-Dec 19, 2 in 5 respondents had a train cancelled. This has been consistently the nature of disruptions respondents experienced throughout waves

Oct-Dec 19: Nature of disruption (%)



Which of the following best describes the nature of the #DISRUPTION#?
Base 3,567

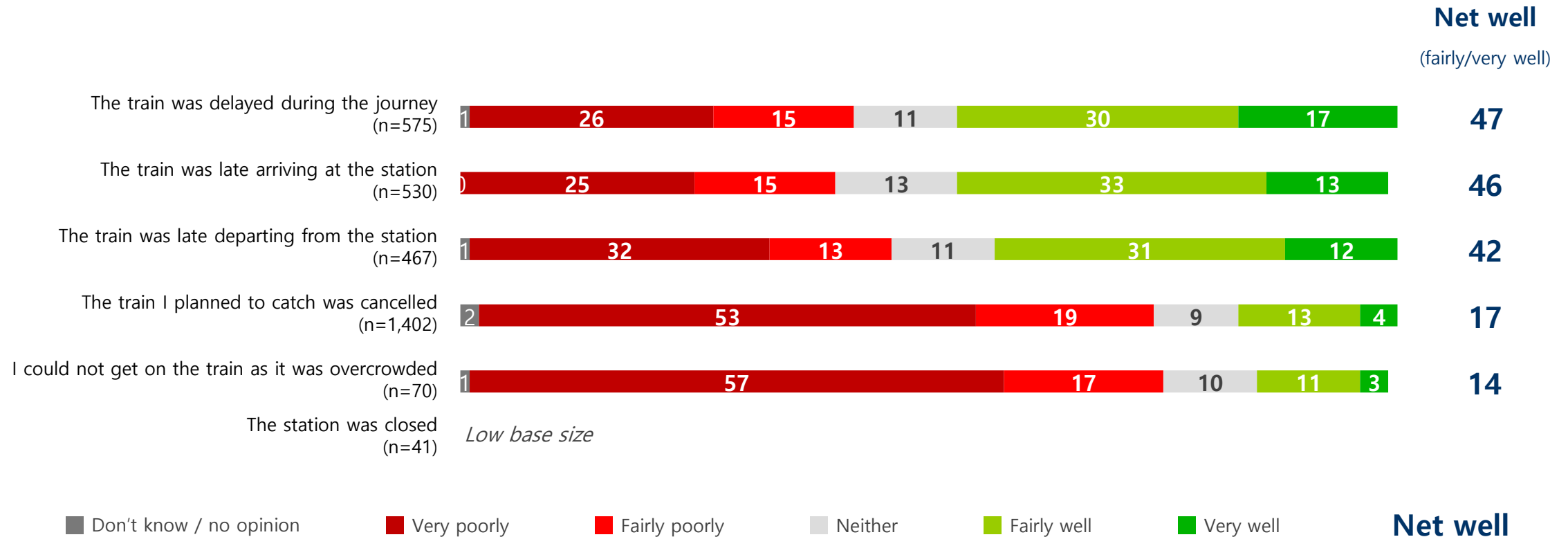
Overall wave on wave change (%)

	Jul-Sep 18	Oct-Dec 18	Jan-Mar 19	May-Jun 19	Jul-Sep 19
The train I planned to catch was cancelled	43	46	40	33	39
The train was delayed during the journey	18	16	20	23	20
The train was late arriving at the station	10	11	9	14	13
The train was late departing from the station	8	8	7	13	11
I could not get on the train as it was overcrowded	2	2	3	2	2
The station was closed	2	2	1	1	2
None of the above	16	15	19	14	14

Keeping passengers informed by nature of disruption

- The lowest satisfaction score for being kept informed comes from passengers that could not get on the train as it was overcrowded (14%)
- In this context train cancellation has the second lowest satisfaction score (17%)
- Passengers are most satisfied with the information provided when the train is delayed during the journey or late arriving at the station, so at these stages TOCs do better

Oct-Dec 19: How well passengers are kept informed by nature of disruption (%)



Overall how well do you think the train company kept you informed about the delay or cancellation?
Base 3,567

Train cancelled improvement

- Over half (52%) of those who experienced a train cancellation want information about alternative transport. This is 20% points higher than for those who experienced another type of disruption; this is information that TOCs need to provide now; passengers want solutions
- Just over 2 out of 5 people who experienced a cancelled train would like to see improved frequency of updates (41%) and greater reliability of the information (45%). This is comparable to respondents who experienced other disruptions, where 44% would want more regular updates and 41% greater reliability of the information

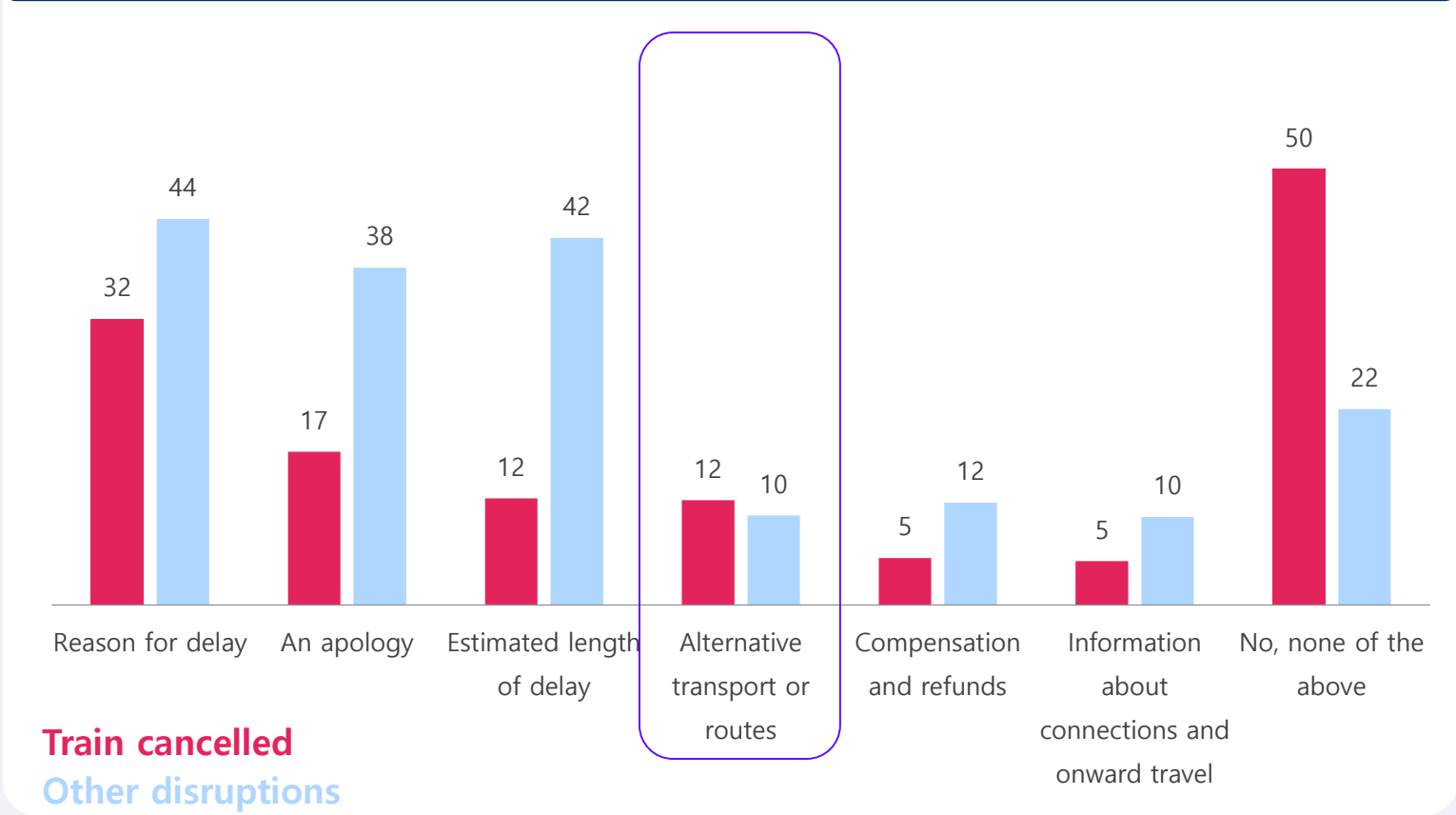


If you were to be disrupted again which of the following would you have liked to be improved?
Base 3,567

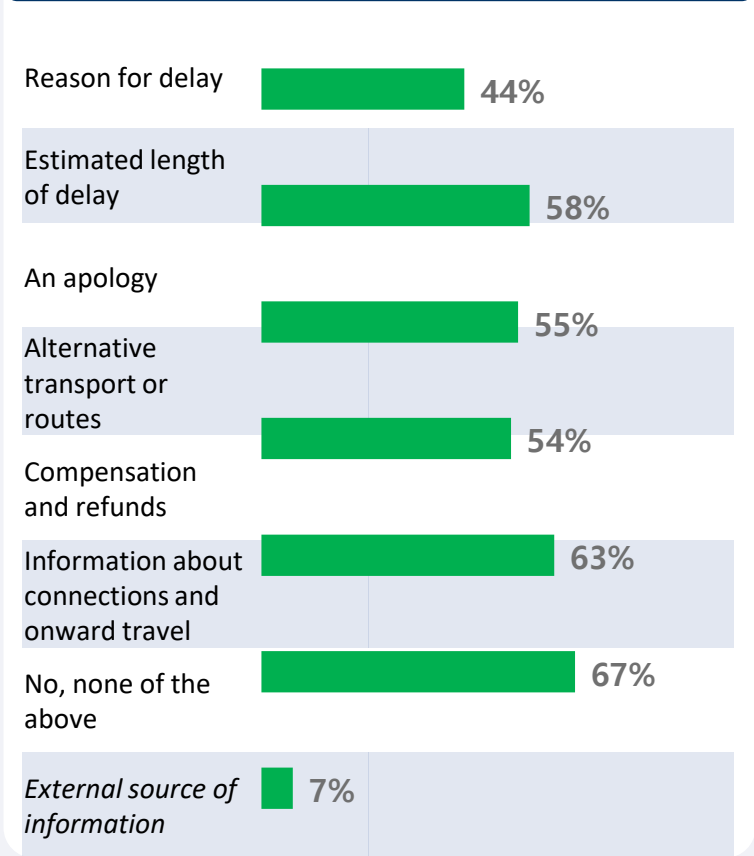
Information provided

- Information provision when a train is cancelled is generally very poor with 1 in 2 not receiving any information about the disruption.
- Only 12% receive information about alternative transport or routes. In general, TOCs are lacking information about connections and onward travel, compensation and refunds and alternative transport across channels.
- To keep passenger satisfied, provision of some information is crucial such as connections, compensation and refunds and estimated length of delay

Oct-Dec 19: Information provided (%)



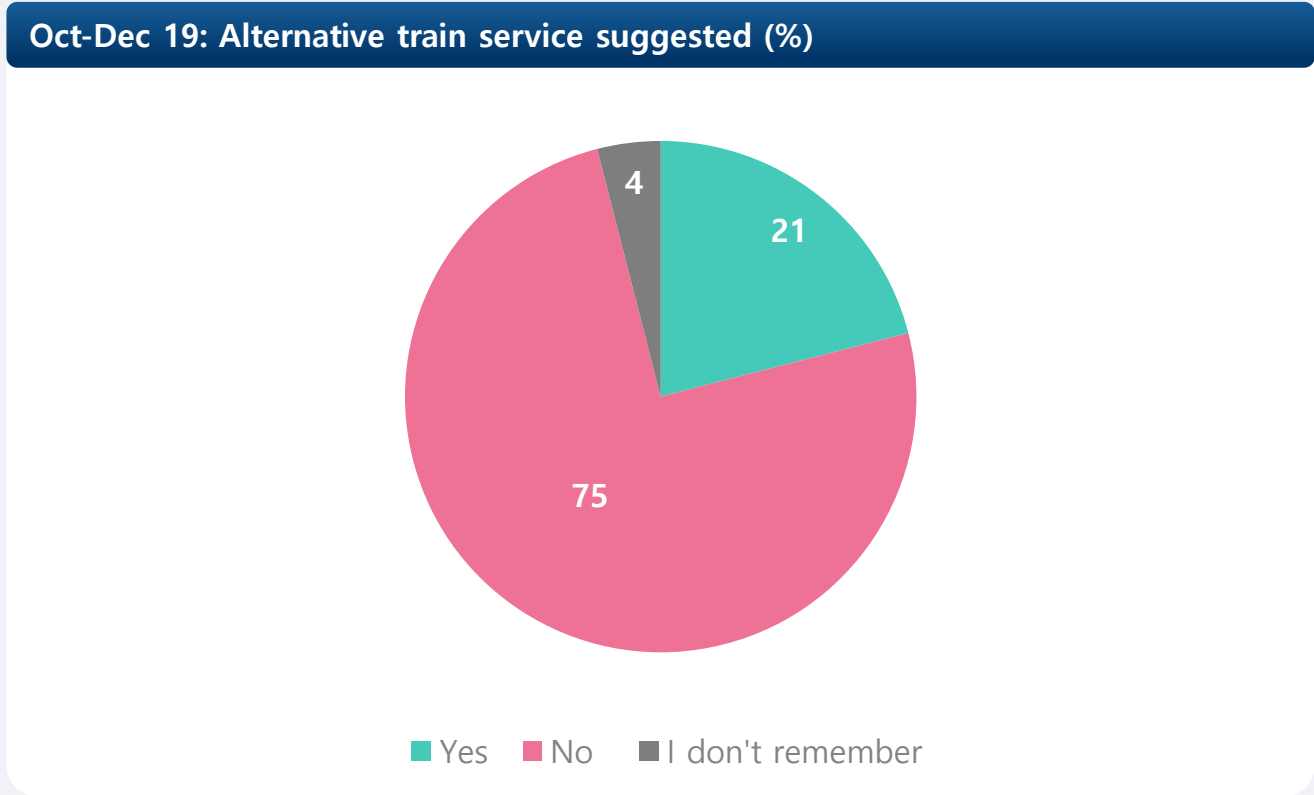
How well passengers are kept informed by information provided (%)



Did the information provided include any of the following?
Base 3,567

Alternative train service suggested

- 1 in 5 disrupted passengers are given an alternative train service. This rises to 2 in 5 when a train is cancelled which is positive progress but still rather low



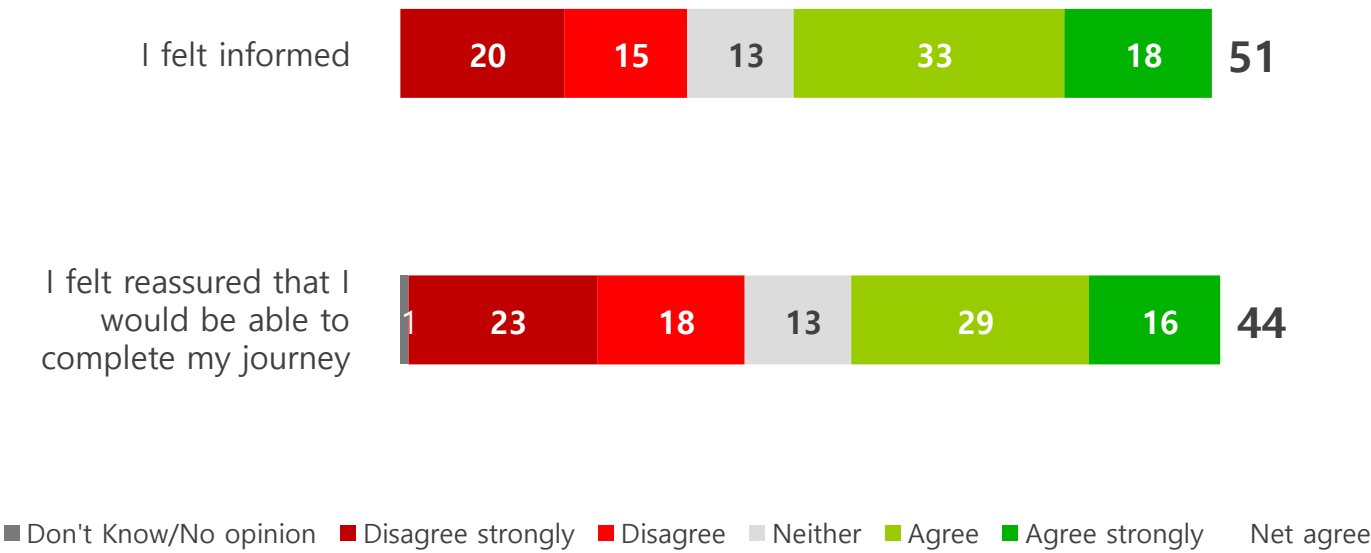
Alternative train service suggested by nature			
	Yes	No	I don't remember
The train was late arriving at the station	13	82	5
The train was late departing from the station	18	76	6
The train was delayed during the journey	20	74	6
The train was overcrowded	21	74	4
The train I planned to catch was cancelled	25	72	3

Was an alternative train service suggested so you could complete your journey?
Base: 3,567

How passengers feel when provided with an alternative train service*

- The majority of passengers who were given information about alternative train services felt informed and reassured
- But still about 40% did not feel reassured that they would be able to complete their journey

Oct-Dec 19: Statements about alternative train service (%)



Net well (agree/strongly agree)

Before arrival	At the station	On the train	At interchange**
53	52	49	
43	46	43	

How strongly do you agree with the following statements about the provision of the alternative train service?
Base 738

** Low base size

Ways to improve confidence about alternative transport/routes

- Respondents' confidence, when being given alternative transport options is often low because not enough information is provided and the information is often felt to be inconsistent

Oct-Dec 19: How to improve confidence in alternative transport



"If all trains are going to be cancelled to a main station like London Bridge, you should have an email or text alert system for people who opt in. The alerts should not be used for spam and offers, just in situations like someone being hit by a train"

"Alerts sent to customers BEFORE they decide to travel. E.g. if the company know that the train service is cancelled first thing (5am onwards) then they should have informed customers of this and provided the relevant information for alternative travel arrangements"

"More communication about what is going on and what I need to do. Easier ways to apply for compensation, I find I am always chasing up claims months after I have submitted them"

"Provision of passenger assistance more promptly as there was a very short timescale to get to another platform and assistance was required"

"Timetables, mobile apps and station screens being kept up to date with the latest information. Accurate information on what trains are running and not having random trains stop with no announcements, also not cancelling trains and then reinstating them"

"Staff needed to be given correct information to pass onto customers. I was directed to two different trains and told they would stop at Narborough. When the trains got into Leicester it then became apparent that neither would be"

What more could have been done to make you feel more confident about using this alternative?

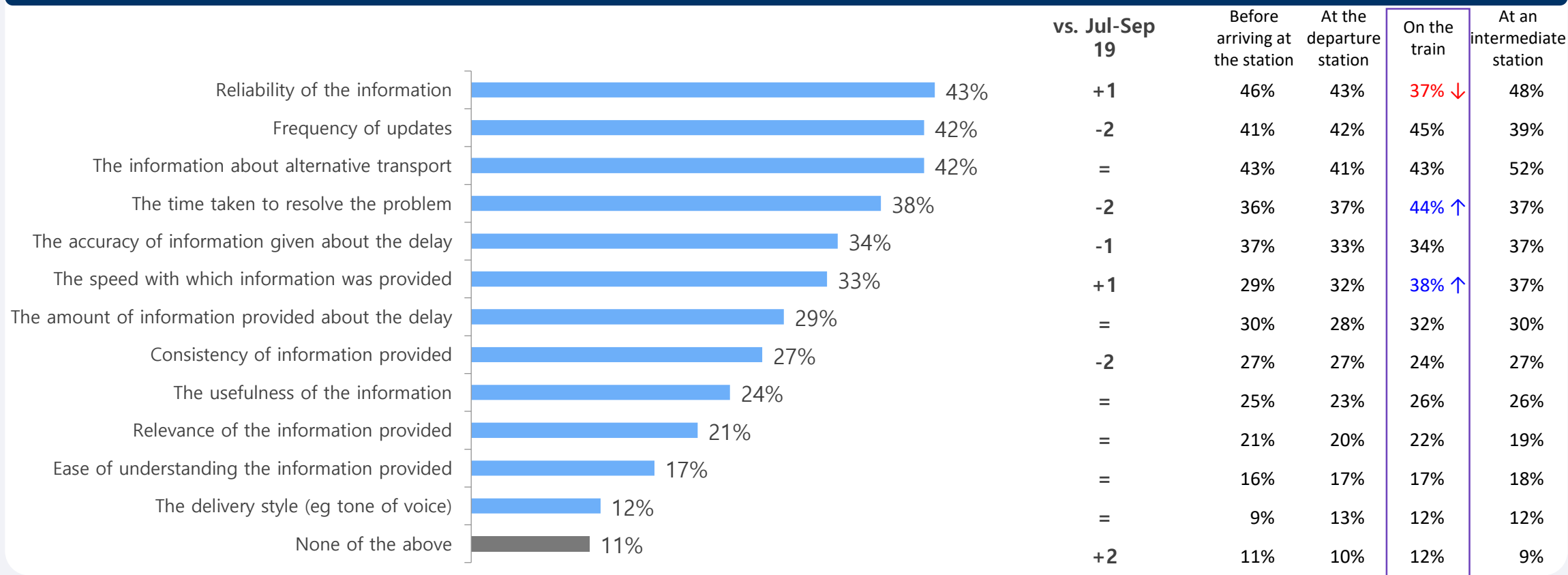
Frequency of the update



Information improvement desired

- For the first time this year, 'reliability of the information' tops the ranking of improvements desired
- Improvement priorities for those on the train are quite different than at other journey stages – reliability of information is less important but the time taken to resolve the issue and information speed are considerably more important

Oct-Dec 19: Information improvement desired (%)



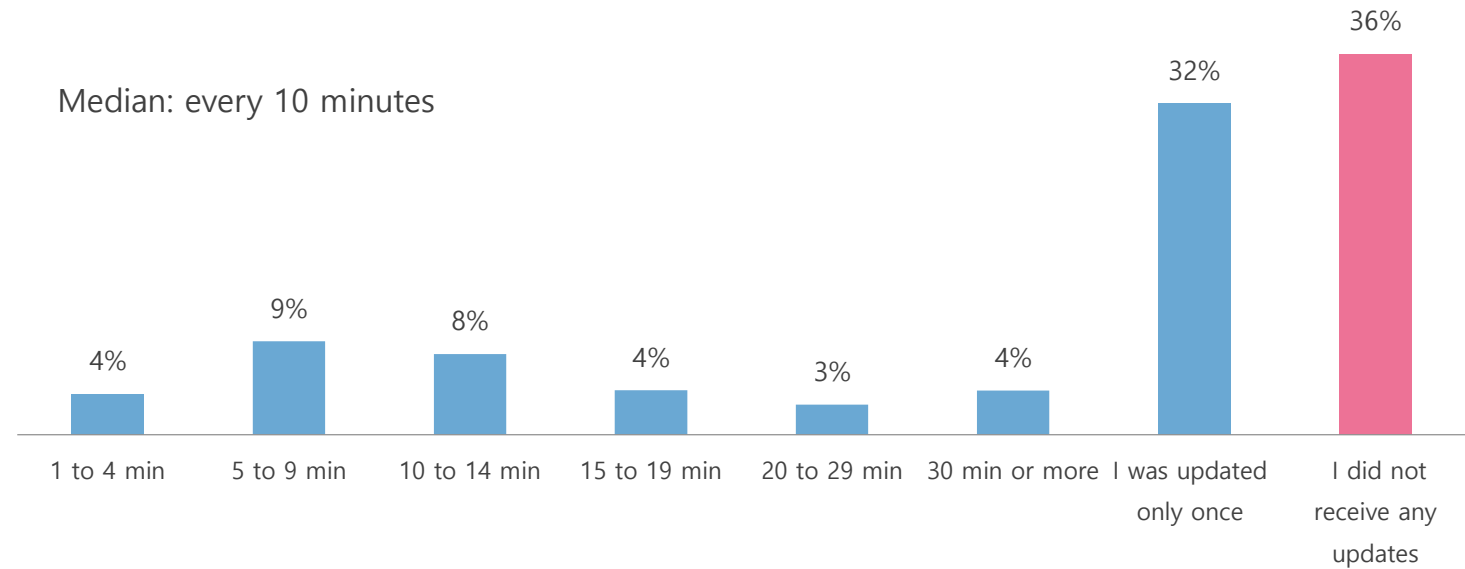
If you were to be disrupted again which of the following would you have liked to be improved?
Base 3,567; Jul-Sep19 3,272

Significantly higher than the overall ↑
Significantly lower than the overall ↓

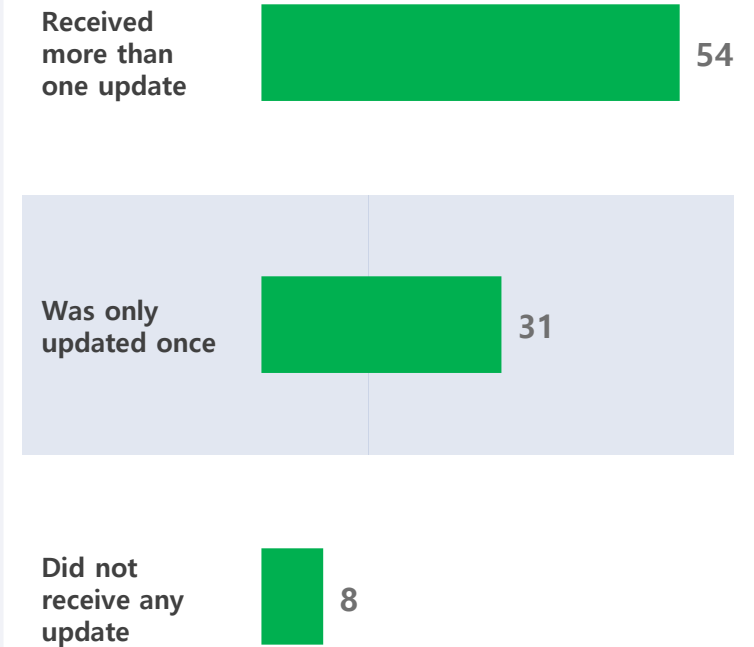
Frequency of the update – current status (Hot Topic)*

- Almost two in five did not receive any update during the disruption. As seen in the previous wave those who didn't receive an update are those that are less satisfied with how TOCs kept them informed
- Just under a third received only one update. Their satisfaction is also lower than those updated multiple times
- When passengers received more than one update the median frequency of updates is once every 10 minutes

Oct – Dec 19: Frequency of updates received – Every...



How well TOCs kept informed - NET well (%)



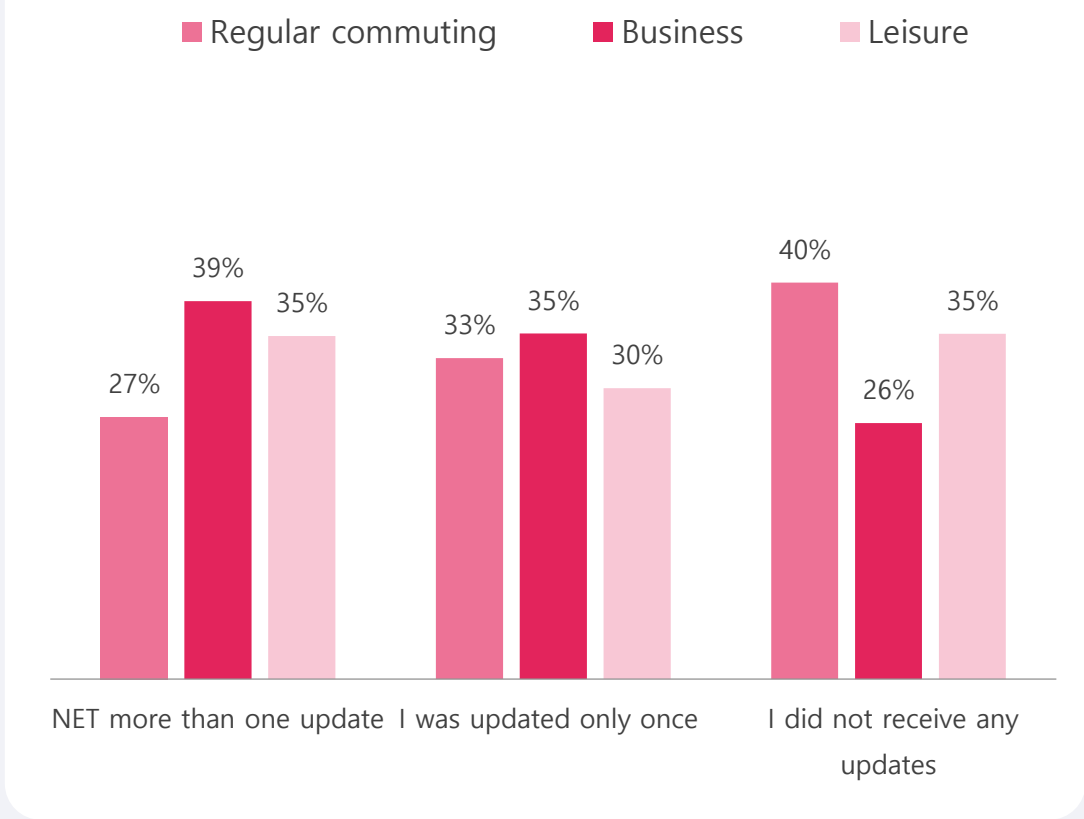
On average, how often did you receive an update about the disruption? If the frequency of the updates varied, please try to give an average:
Base 1600

* New question introduced during September 2019

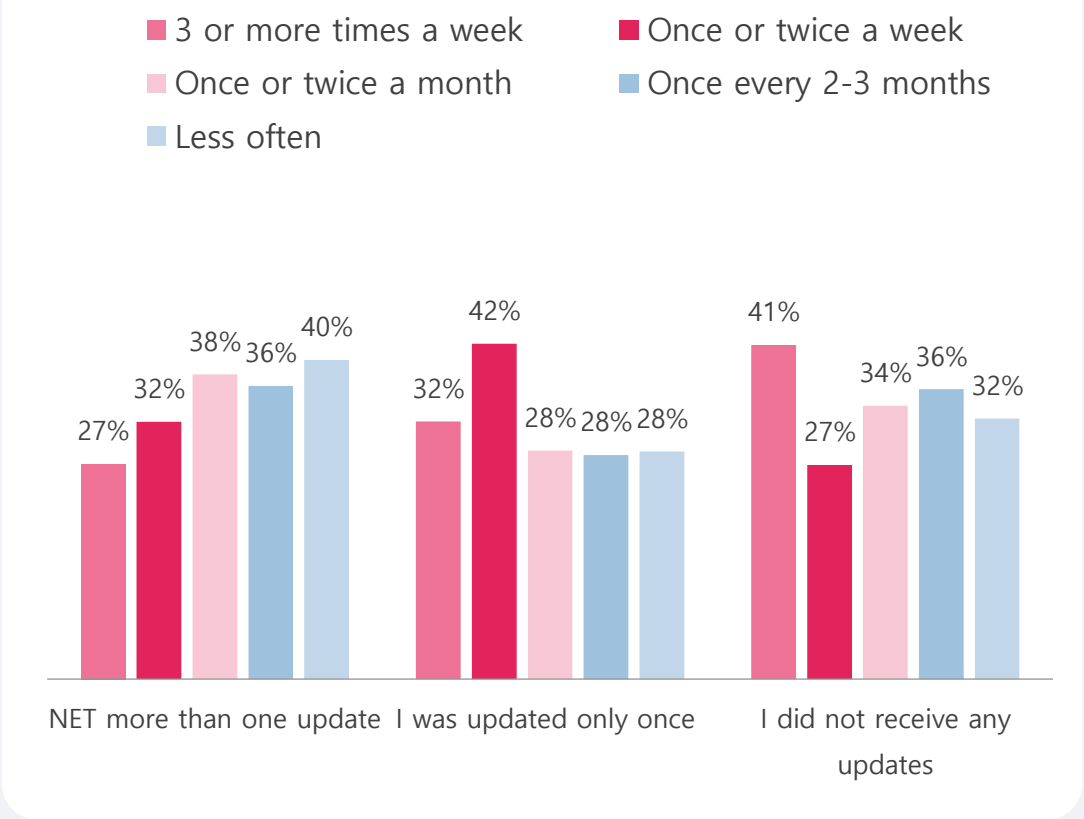
Frequency of the update – current status

- More frequent passengers and those commuting are less likely to receive any updates. These are more likely to travel during peak times
- There is a feeling that less information is being fed back to passengers when stations and trains are busy. This maybe because commuters are more desensitized to the information available and need updates they pay more attention to

Oct-Dec 19: Frequency of updates received by passenger type – Every...



Oct-Dec 19: Frequency of updates received by frequency of TOC usage – Every...

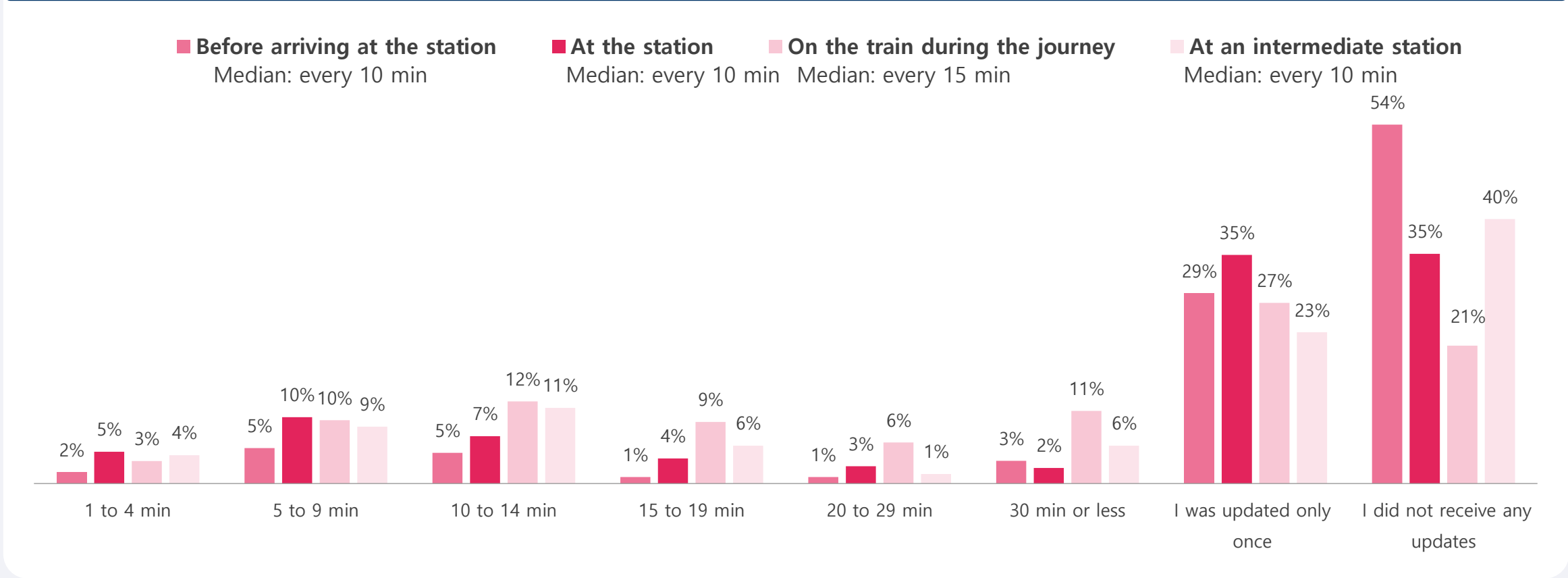


On average, how often did you receive an update about the disruption? If the frequency of the updates varied, please try to give an average:
Base Leisure and other personal reasons (902) Business (241) Regular commuting (882) / 3 or more times a week (893) Once or twice a week (279) Once or twice a month (360) Once every 2-3 months (245) Less often (220)

Frequency of the update – current status

- One in two passengers aware of the disruption before arriving at the station did not receive any update about the disruption
- When disrupted on the train passengers are less likely to receive as frequent updates as at any other journey stage

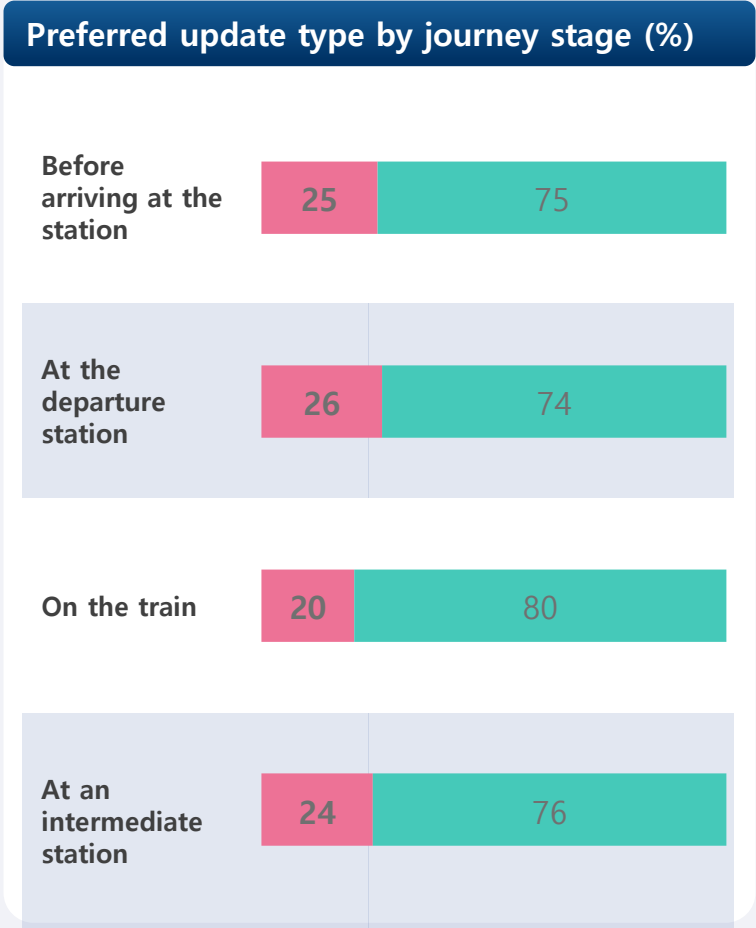
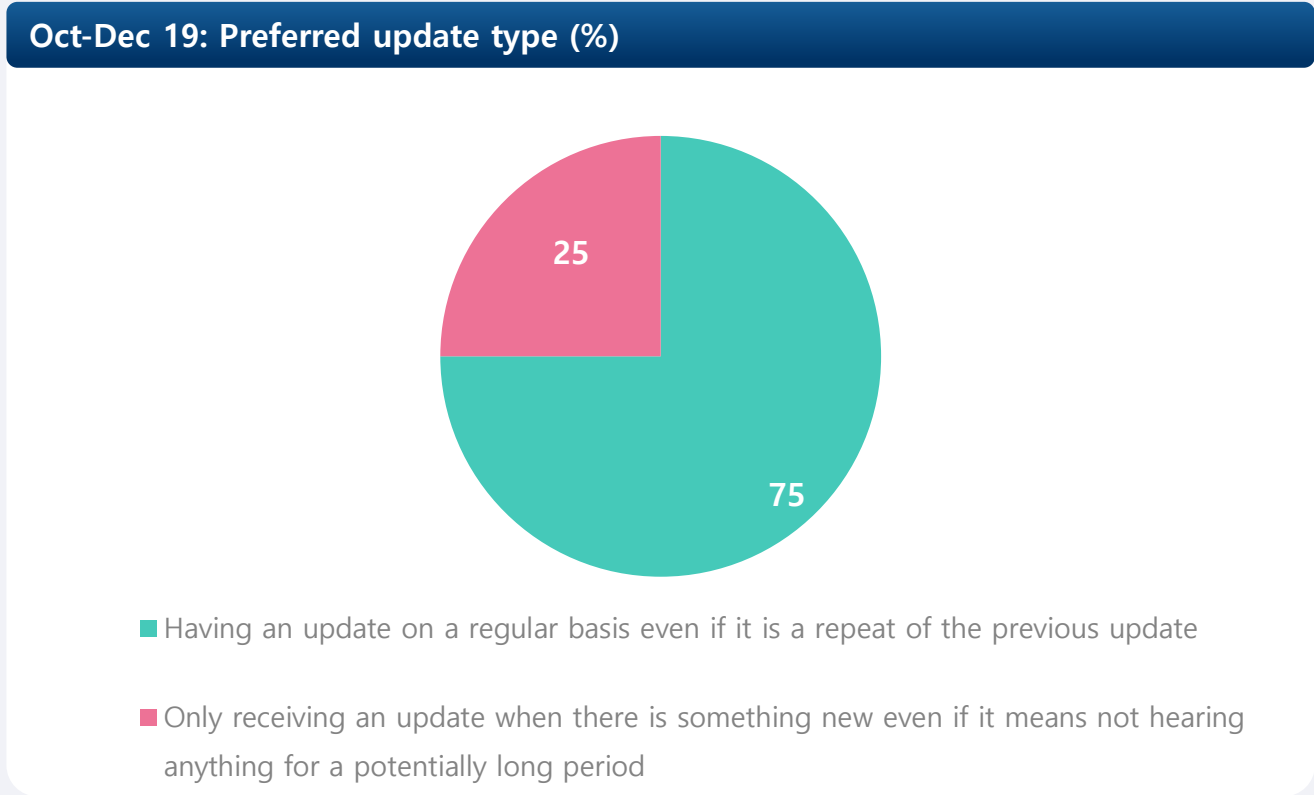
Oct-Dec 19: Frequency of updates received by journey stage – Every...



On average, how often did you receive an update about the disruption? If the frequency of the updates varied, please try to give an average:
Base Before arriving at the station (411), At the departure station (1189), On the train during the journey (355), At an intermediate station (70)

Preferred type of update

- A large majority of passengers (75%) prefer having an update on a regular basis even if it does not provide anything new. When the disruption happened on the train this proportion rises to 4 in 5 passengers



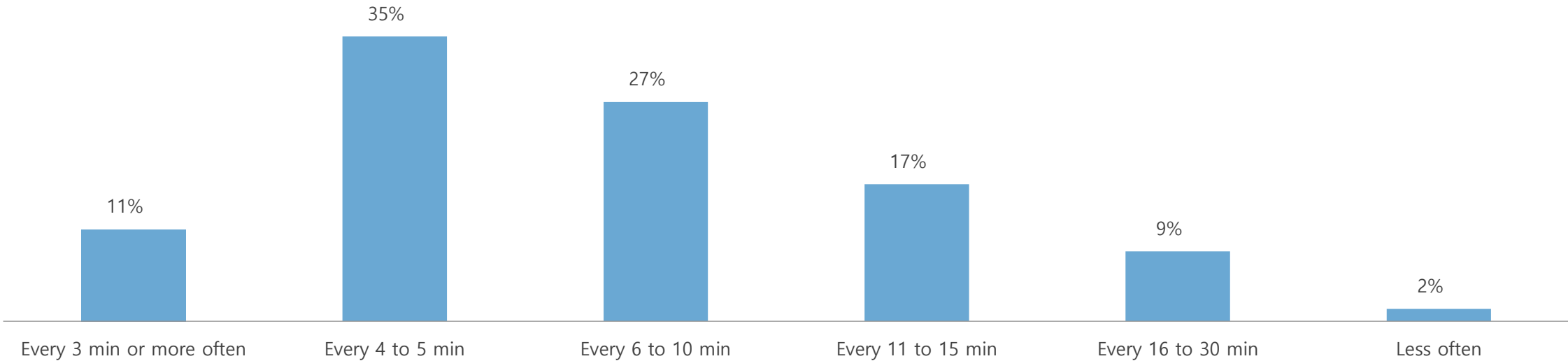
During a disruption to your journey, which of these would you prefer? N= 2,025 / Before arriving at the station (411) At the departure station (1,189), On the train (355), At an intermediate station (70)

Frequency of the update – current status

- Passengers wishing for regular updates want to get an update every time 10 min overall. This is a good news as this is the current update frequency provided by TOCs. It also means that the issue is not about how frequent updates need to be but about receiving more than one update

Oct-Dec 19: Desired frequency of updates

Median: every 10 minutes



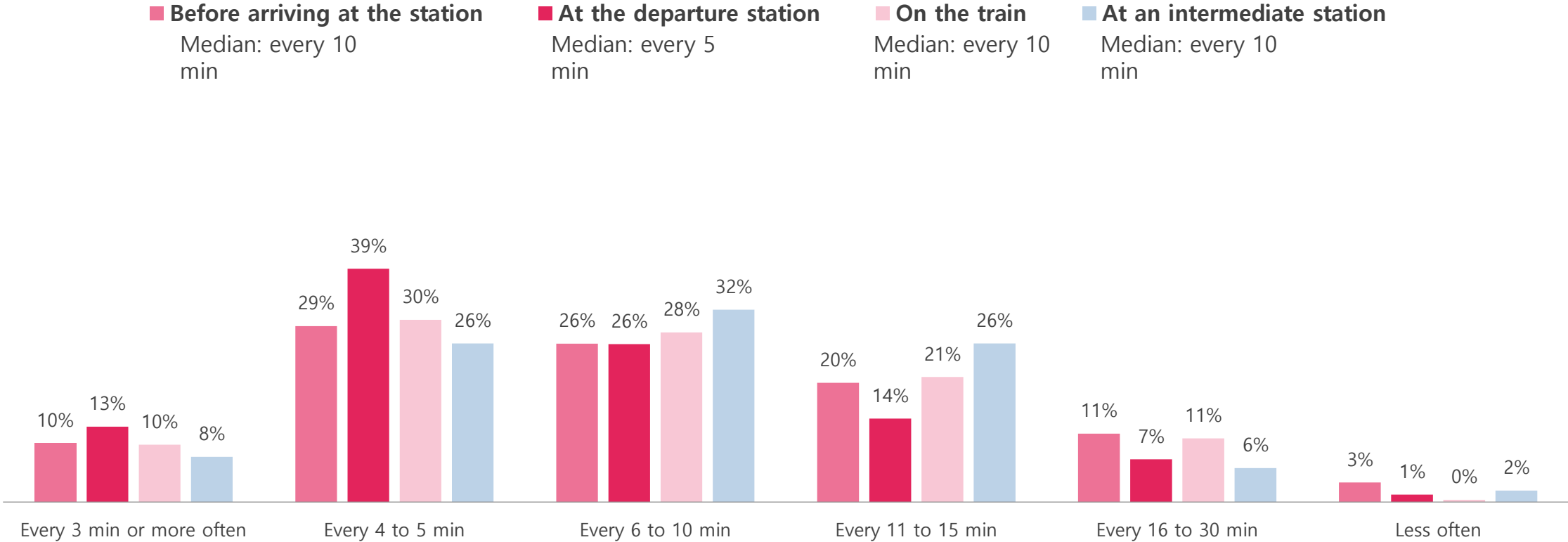
And how often would you like to be updated during disruption?
Base 1,510

* New question introduced during September 2019

Frequency of the update – current status

- The frequency of updates by journey stage shows some differences:
 - When a disruption happens at the station, updates need to be a bit more frequent (every 5 min)
 - On the train updates need to be a little more frequent (every 10 min) than what they are currently (every 15 min) at that stage

Oct-Dec 19: Desired frequency of updates by journey stages

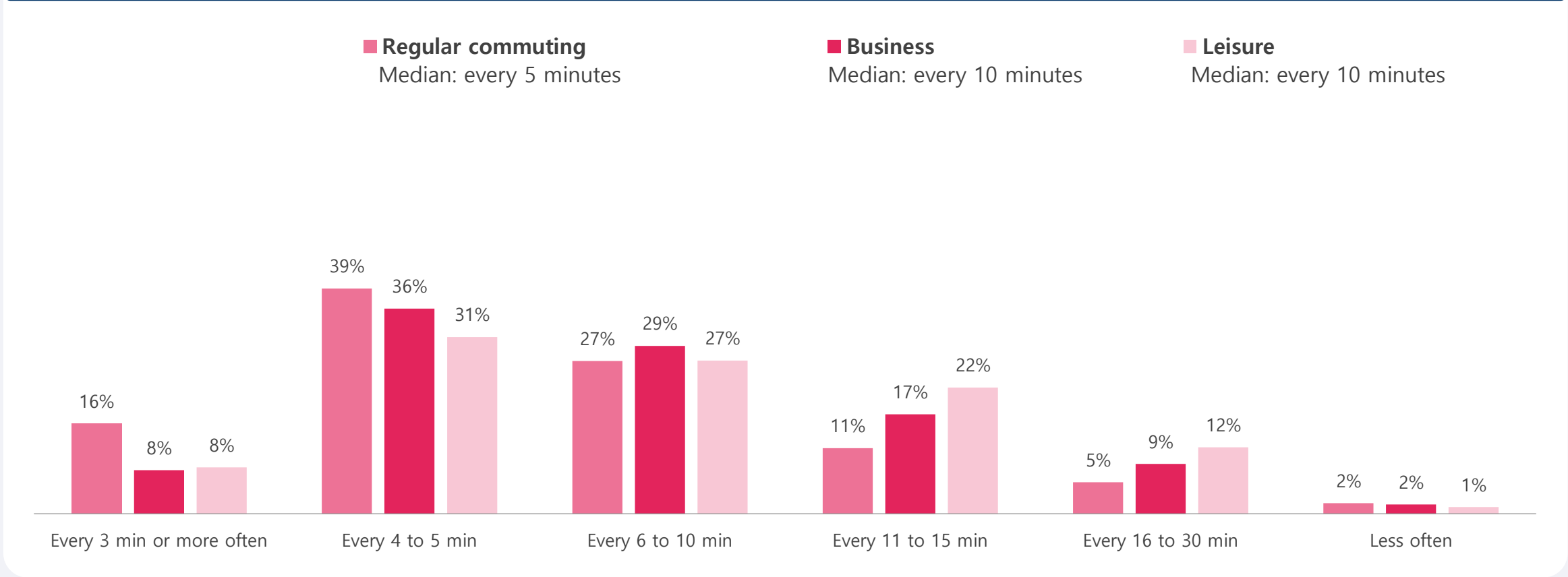


And how often would you like to be updated during disruption?
Base: Before arriving at the station (307), At the departure station (885) On the train (283), At an intermediate station (53)

Frequency of the update – current status

- Regular commuters (travelling on shorter journeys for most) would like to be updated every 5 minutes even if it means repeating the previous update

Oct-Dec 19: Desired frequency of updates by passenger type

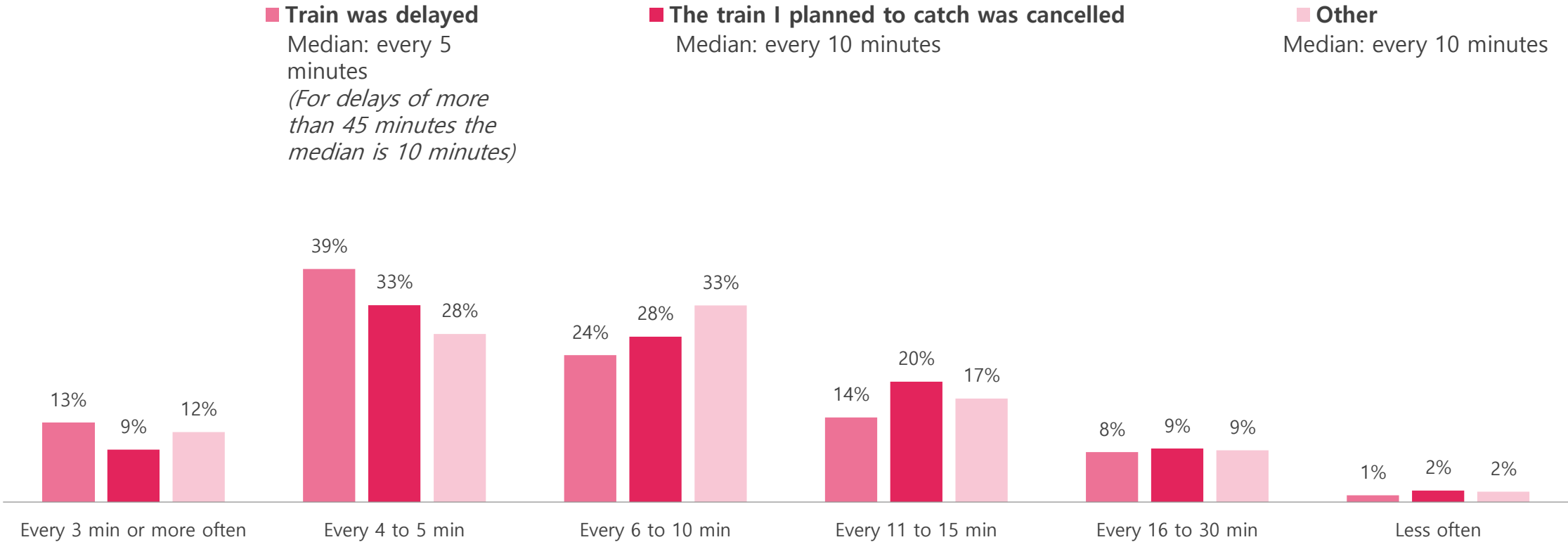


And how often would you like to be updated during disruption?
Base: Regular commuting (659), Business (185), Leisure (684)

Frequency of the update – current status

- When a train is delayed passengers want more frequent updates (every 5 min) except when these delays become longer. This means when a train is first delayed – more frequent updates are needed. After a delay of 45 min, if the train is still delayed, updates can be less frequent (every 10 min)

Oct-Dec 19: Desired frequency of updates by nature of the disruption (%)

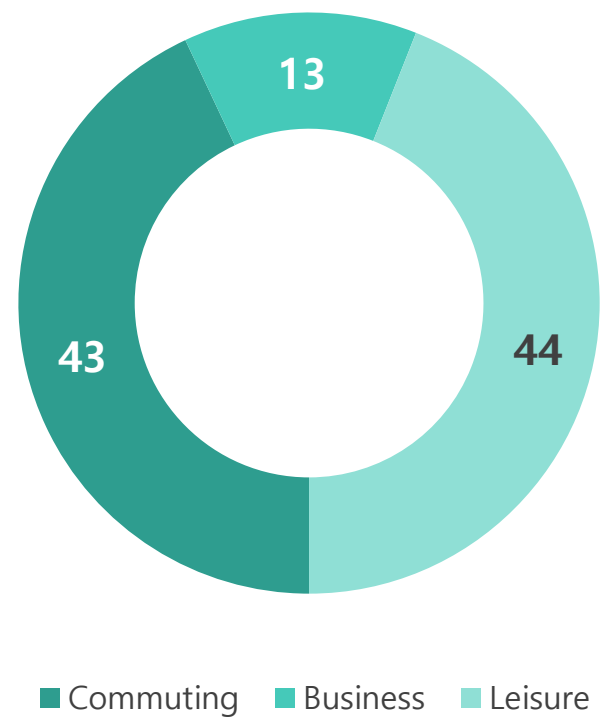


And how often would you like to be updated during disruption?
Base: Train was delayed (723), The train I planned to catch was cancelled (573), Other (232)

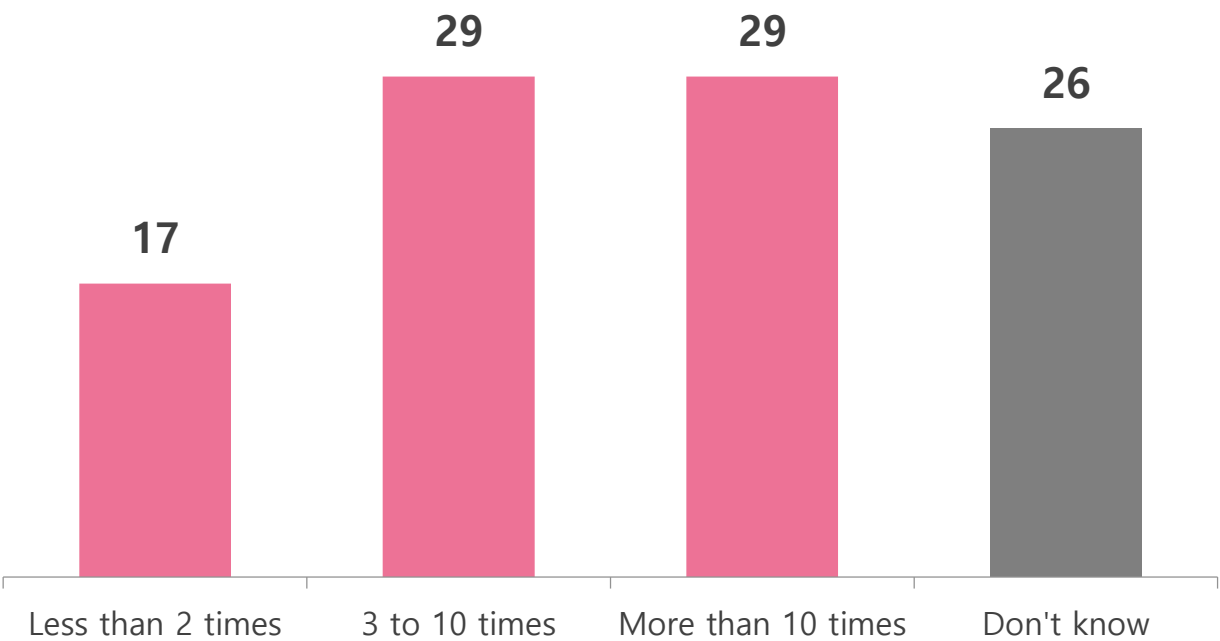
Appendix

Demographics

Oct-Dec 19: Traveller type (%)



Oct-Dec 19: Times disrupted in the past 12 months (%)



What was the main purpose of the train journey? Base 3,567, How often have you been disrupted more than 15 min by train in the past 12 months? Base 3,567

For further information



Tim Sander — Director



020 7400 1021



07989 165 658



Tim.Sander@bva-bdrc.com



Thomas Folqué — Associate Director



020 7400 1139



Thomas.Folque@bva-bdrc.com

Quality and accreditation



BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001.

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements

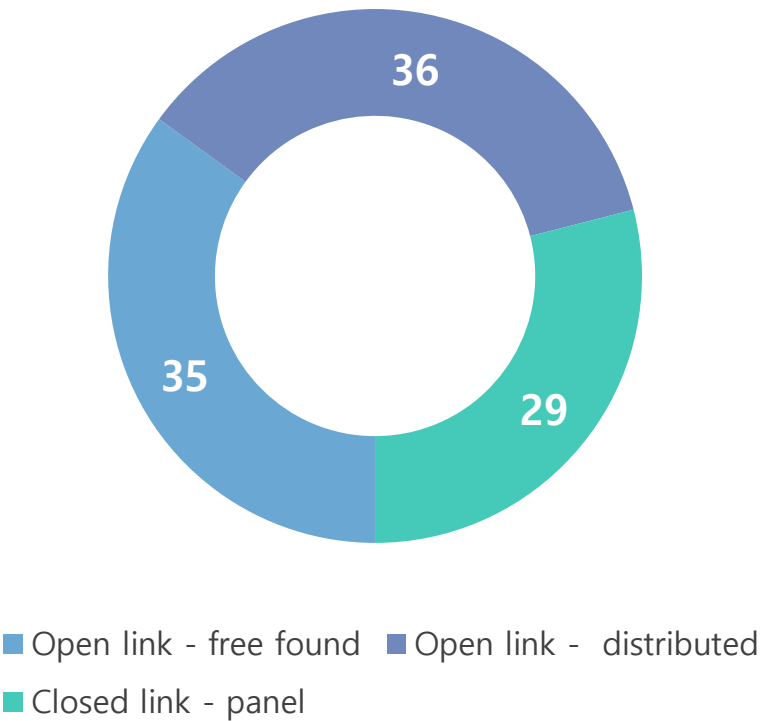
Sample analysis



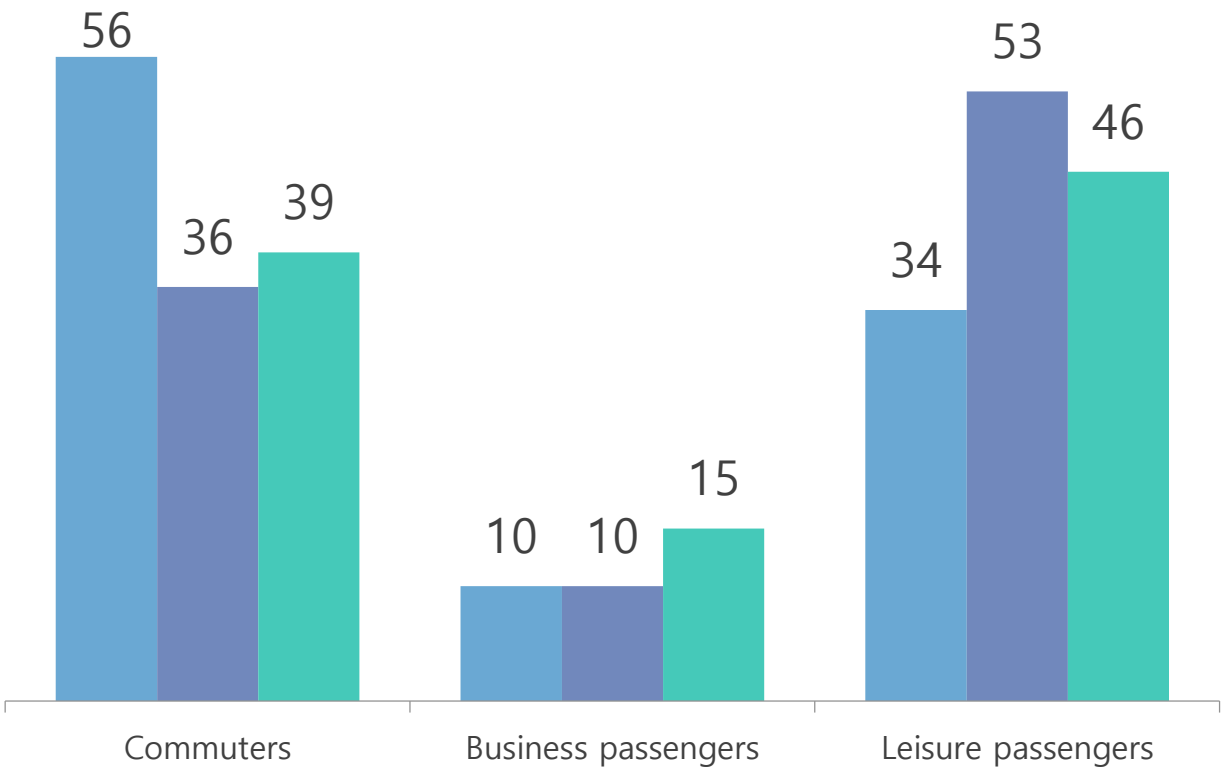
Demographics

- More than half of surveys completed via the open links (free found) are from commuters
- One in two respondents that were given the open link is a leisure passenger

Oct-Dec 19: Sample source (%)



Oct-Dec 19: Passenger type by sample source (%)



What was the main purpose of the train journey?
Base 3,567, Open link free found (n=1,291), Open link distributed (=1,291), Closed link panel (n=1,019)

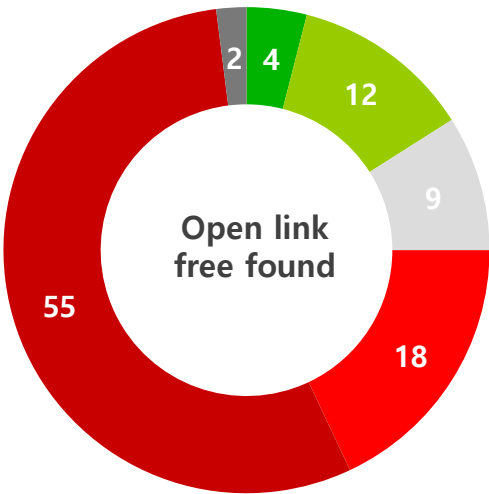
Keeping passengers informed by sample source

- Satisfaction with information provision from the free found sample is the lowest

Oct-Dec 19: : How well passengers are kept informed (%)

Net well (very/fairly well)

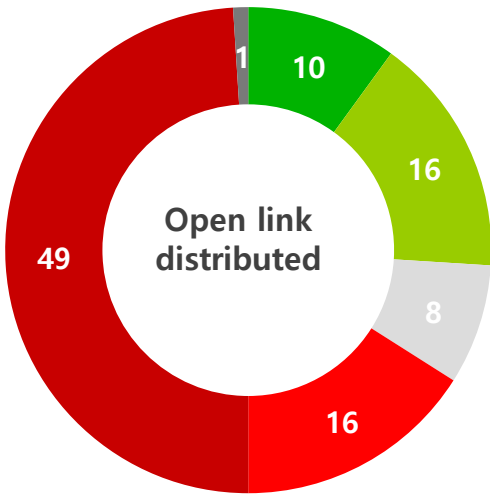
16%
(-14% vs. Overall)



Very well Fairly well Neither

Net well (very/fairly well)

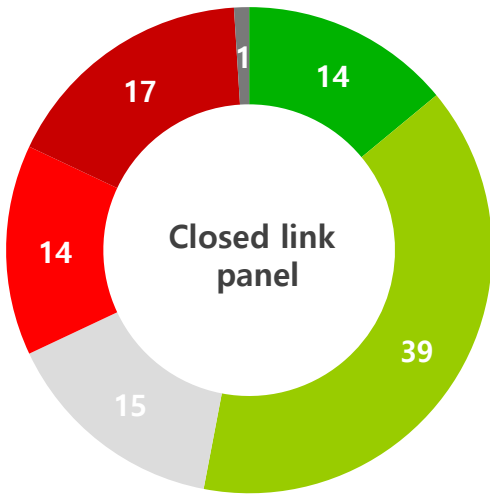
26%
(-4% vs. Overall)



Fairly poorly Very poorly

Net well (very/fairly well)

53%
(+23% vs. Overall)



Don't know / no opinion

Overall how well do you think the train company kept you informed about the delay or cancellation?
Base 3,567, Open link free found (n=1,257), Open link distributed (=1,291), Closed link panel (n=1,019)

Dealing with delay/cancellation by sample source

- Satisfaction with how the disruption is dealt with is the lowest for the free found sample

Oct-Dec 19: How well TOCs deal with delay/cancellation (%)

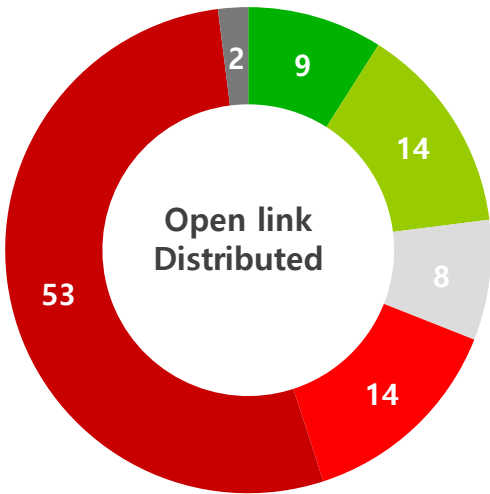
Net well (very/fairly well)

11%
(-14% vs. Overall)



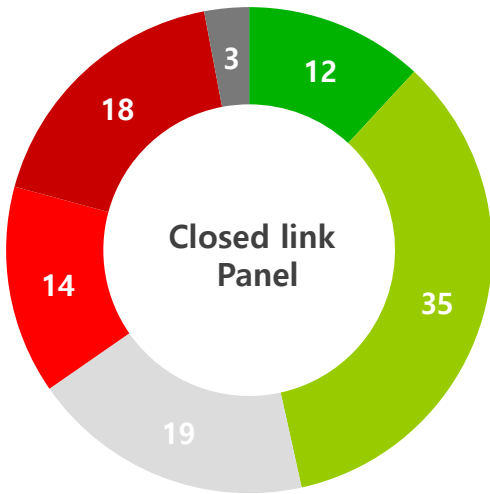
Net well (very/fairly well)

23%
(-2% vs. Overall)



Net well (very/fairly well)

47%
(+22% vs. Overall)



Very well

Fairly well

Neither

Fairly poorly

Very poorly

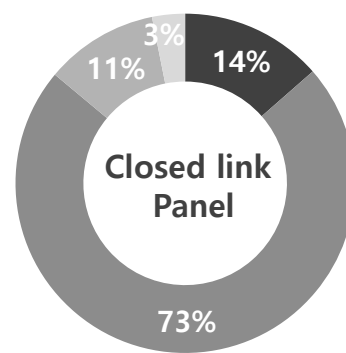
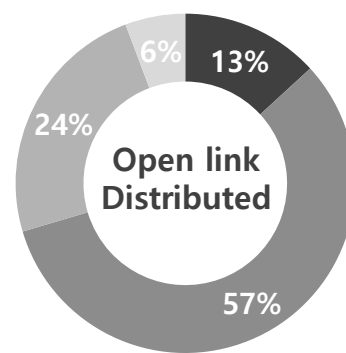
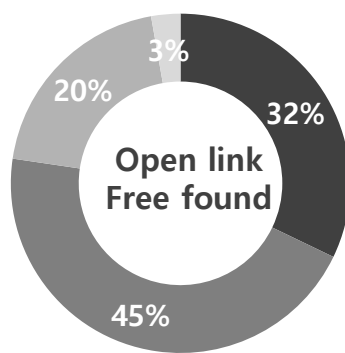
Don't know / no opinion

Overall, how well do you think the train company dealt with this delay?
Base 3,567, Open link free found (n=1,257), Open link distributed (=1,291), Closed link panel (n=1,019)

Information provision by journey type and sample source

- While most of the distributed open link and panel respondents first heard of the disruption at the station, the journey stage distribution is much more balanced for the free found sample

Oct-Dec 19: Journey stage by sample type



■ Before arrival ■ At station ■ On train ■ At interchange

Information provision - Net well (very/fairly well)

Before arrival	17% (-10% vs. Overall)	26% (-1% vs. Overall)	57% (+30% vs. Overall)
At station	11% (-18% vs. Overall)	19% (-10% vs. Overall)	53% (+24% vs. Overall)
On train	28% (-9% vs. Overall)	40% (+3% vs. Overall)	48% (+11% vs. Overall)
At interchange	6% (-25% vs. Overall)	30% (-1% vs. Overall)	63% (+32% vs. Overall)

Overall how well do you think the train company kept you informed about the delay or cancellation? / When were you first aware of a possible #DISRUPTION# to your train journey?
Base 3,567, Open link free found (n=1,257), Open link distributed (=1,291), Closed link panel (n=1,019)