

InfoTracker Survey

Q1 2023-24 (Apr-June 23)

Rail Delivery Group



Content

Background and methodology	3
Summary	4
Overall satisfaction	5
Key performance indicators	8
Stages of the journey	19
Experience with disruptions	61
Appendix	74
Contact	81

Background and methodology



Background

The overarching objective is to measure customer satisfaction with the provision of information by the rail industry, particularly during times of disruption, with the aim of assessing how the industry performs against their customer pledges.

Information plays a vital role in all stages of the customer journey, so the research assesses the provision from when a customer is booking their journey, through to arrival at their end destination (end to end journey rather than station to station).



Fieldwork

The current report presents the findings covering Quarter 1 2023/2024 among n=2,570 respondents.

The fieldwork was conducted from 1st April to 30th June 2023.

Where possible, we report on comparisons between quarters to assess any change in trends.

*Strikes continued throughout this period (12th, 13th May, 3rd June, as well as ASLEF overtime ban).



Sample

The online questionnaire was completed by n=2,570 online panellists. The sample was split by TOC and by disruption type, with the fieldwork aiming to deliver:

- 100 respondents for each of the 26 TOCs where possible, with up to 10 for Lumo
- We aimed for 50% of respondents who experienced no disruption, 25% of those who experienced a disruption of less than 15 minutes and 25% who experienced a disruption of more than 15 minutes or a cancellation.

Weighting

The data was weighted to the average passenger volumes that train companies cover (based on the average across the last 5 rail periods). The weighting for the GTR TOCs is based on the Autumn 2019 NRPS split to work out the percentage weighting for each TOC.

Reporting on disruption:

In the report, we classify disruption type as follows:

- Minimum disruption = a disruption of less than 15 minutes
- Major disruption = a disruption of more than 15 minutes or cancellation

Significant differences compared to the previous quarter

+/- in red refers to a significant decrease compared to Q4 2022, while

+/- in green refers to a significant increase compared to Q4 2022.

Summary

Overall satisfaction and rating

Overall satisfaction with information provision is 86%; up 5% pts and a significant increase on last quarter. This is driven by an increase in satisfaction among those experiencing a disruption and commuters/business passengers. At an overall level, the story is encouraging with TOCs performing better than in last quarter and the consistency of the high satisfaction scores recorded across journey stages.

To understand why, satisfaction with the information at the planning and booking stage has improved for those experiencing a disruption, equally the same for those commuting. Passengers were also significantly more satisfied with the ease of finding information, and were generally more positive around the aspect of information provided this quarter.

Nevertheless, each month comes with different experiences and this quarter shows that information provision satisfaction can vary depending on this. While overall satisfaction figures remained quite positive, by journey stage June saw a decline for both on board and at the destination/interchange stage in the journey. While passengers felt the information was less trustworthy in June despite big improvement in the two months previous.

Same as last quarter, two thirds rate the information about their delay as being handled well. The month on month figures help link the potential reduction in satisfaction among the disrupted at points in the journey in June.

Information channels used

The National Rail website/app information source was used most except for 'at the station', 'on board the train' or 'at the destination/interchange station'. At these points screens in the platform area, on the train or wayfinding signage were more useful to passengers, with apps showing to be used as a complimentary channel.

The ratings of the different information channels were high, particularly for the more commonly used ones. Channel satisfaction does, however, change month-on-month. For some, June saw declines in performance, such as notifications via messenger on the way to the station, the NR app/website and screens showing train times/platform numbers at the station, information via a member of staff at the destination station, and by phone/call centre post-journey. All were interlinked with the experiences of disrupted passengers.

It's imperative that the information from channels used is tailored towards the end user. The disrupted passengers' experience of the channels can have an impact on satisfaction and therefore it's important that channels can provide the most suited information to meet their needs.

Pledges

During planning and booking, passengers were very satisfied with the information provided. The number of those receiving different aspects of information is either increasing or stable, and satisfaction is improving, particularly for information on the facilities available on the train. Rail replacement buses were more likely conveyed at this stage like last quarter and it was easy to find where the bus replacement was located.

At the station, platform information and staff assistance were rated highly. Announcements were key at this stage and satisfaction reflects this. Yet, the major and minor disrupted were not always satisfied with these aspects of information. On board, train passengers felt similarly towards announcements. It's important that the information can be tailored to the situation in hand, and providing information on alternative routes will benefit passengers.

Of those delayed, timeliness of information improved while frequency proved to be an area that passengers desire more. This is apparent through the stages, where frequency was not rated highly by the minor disrupted at the station or by the major disrupted on the train. Alongside this, passengers are seeking more reliable information, as there is a level of distrust in the information provided (particularly in June).



Overall satisfaction

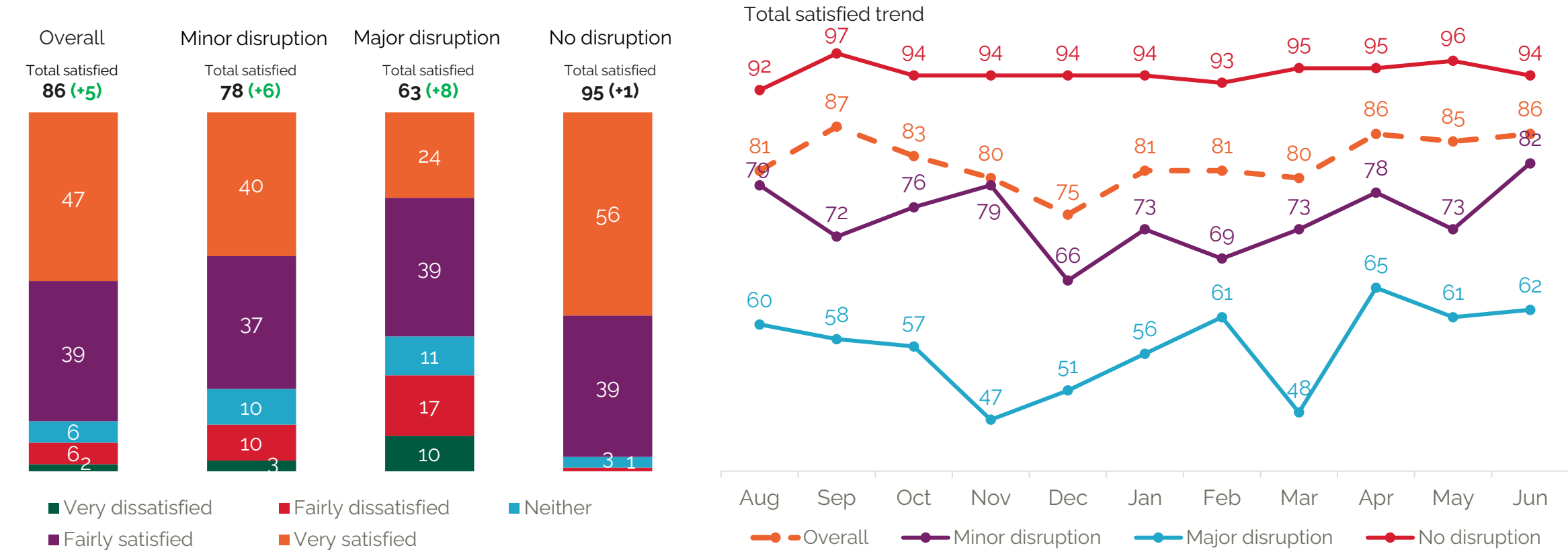
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Overall satisfaction with information provision (1/3)

Passengers' satisfaction with information provision (% very + fairly satisfied) has improved by 5% points to 86% in Apr-Jun 23. Overall, across the last 3 months passenger satisfaction remains high. The majorly disrupted saw a significant increase in their satisfaction in April, which remained stable the following months mirroring data trends in Feb 23.

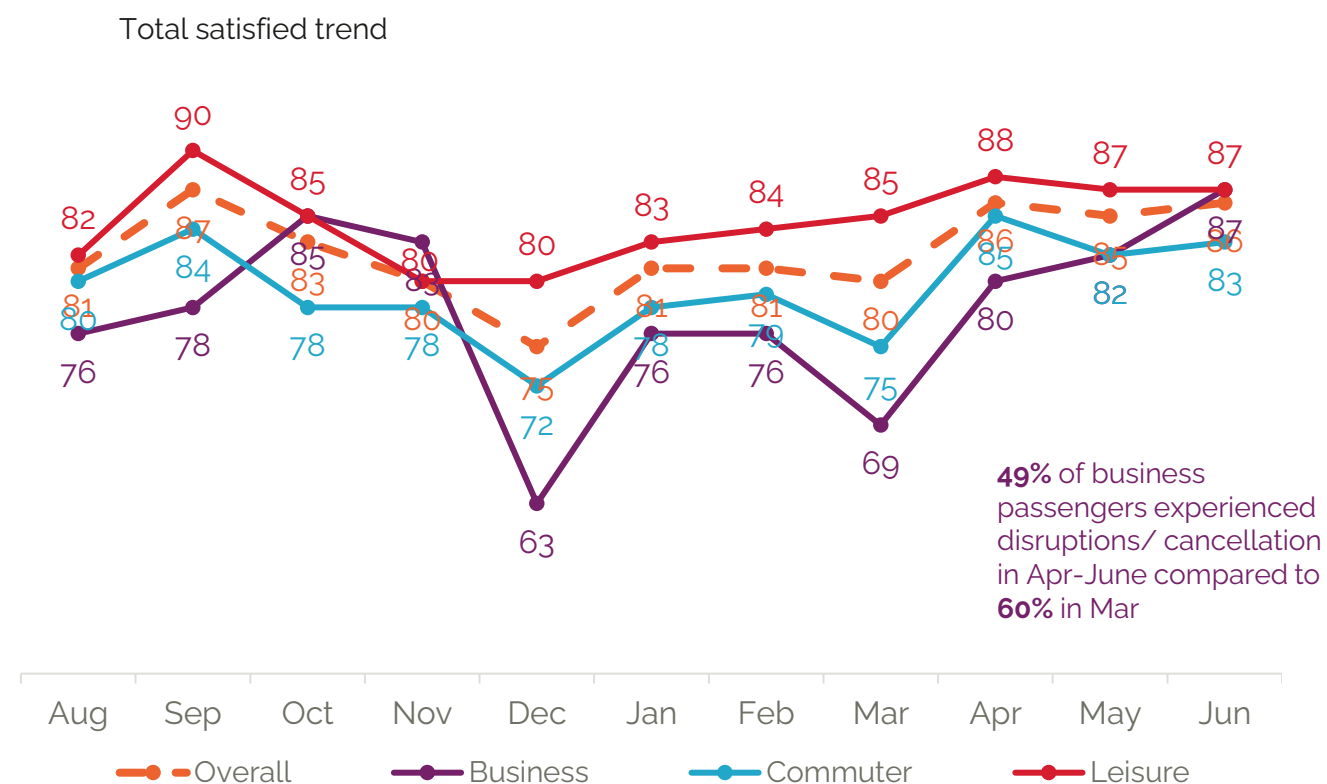
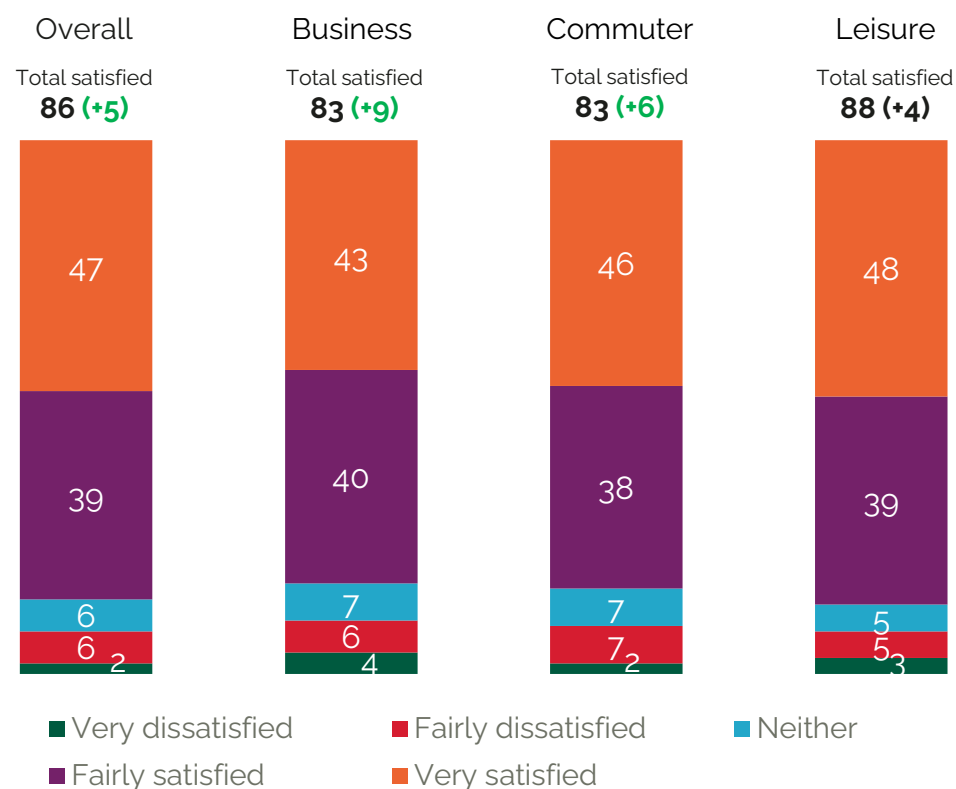
Overall satisfaction with information provision by disruption (%)



Overall satisfaction with information provision (2/3)

Leisure travellers continue to have the highest satisfaction at 88% (4% points up from the previous quarter). Business passengers were significantly more satisfied this quarter, up by 9% points to 83%. This could be explained by business passengers experiencing less disruptions/cancellations across Apr-Jun compared to March 23. Similarly, there was a significant increase in satisfaction among commuters, +6% points to 83%.

Overall satisfaction with information provision by passenger type (%)



Overall, how satisfied were you with the information provided during your journey? (excl DK) Apr-Jun 23 (2634/295/817/1522) Aug/Sept/Oct/Nov/Dec 22/ Jan/Feb/Mar/Apr/May/ Jun 23 – Overall (1089/852/834/870/849/731/891/811/786/1037) Passenger type: Business (193/126/88/82/92/113/89/83/102/91/102), Commuter (449/305/320/275/287/275/251/269/259/244/314), Leisure (826/658/444/477/491/461/391/539/450/451/621)



Key performance indicators

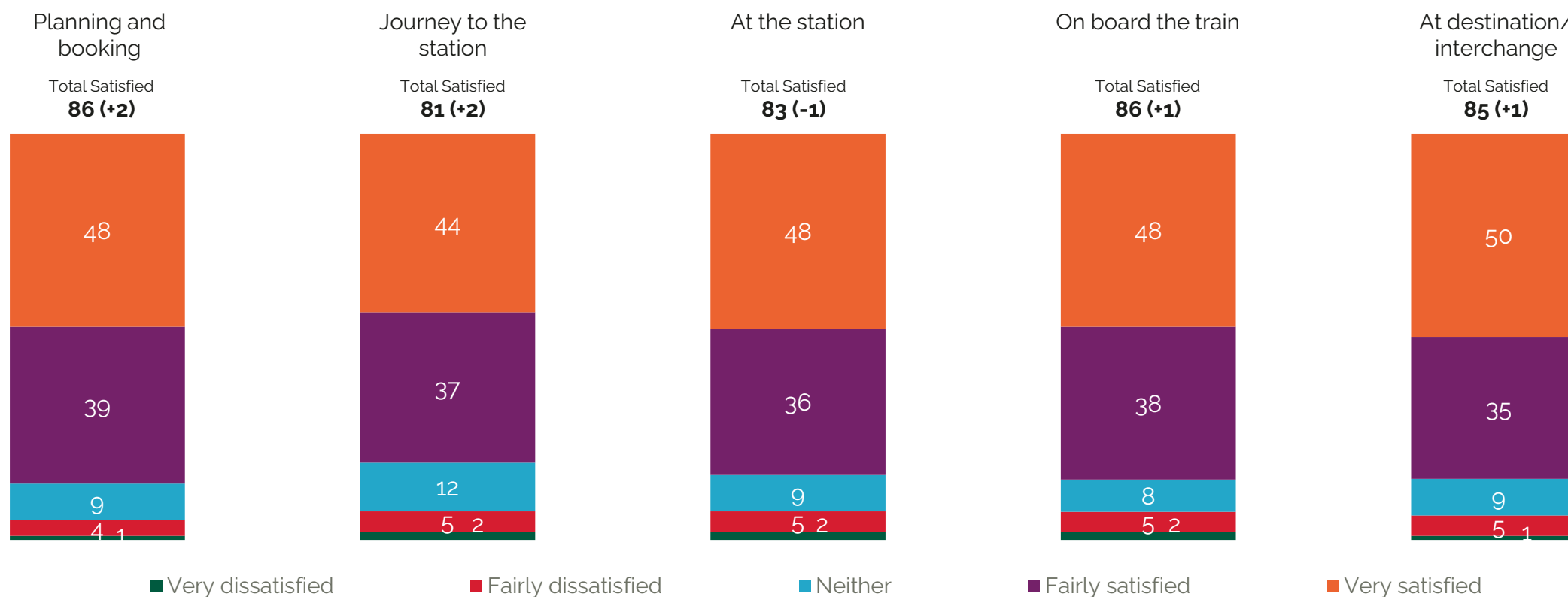
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Overall satisfaction with information provision at each journey stage (1/4)

Rail travellers are generally satisfied with the information provision at different stages of their rail journeys – few were dissatisfied and all show marginal improvements in their satisfaction ratings this quarter. 'Journey to the station' is still the lowest of the 5 stages, however the gap appears to be closing with the other stages (+2% points on last quarter).

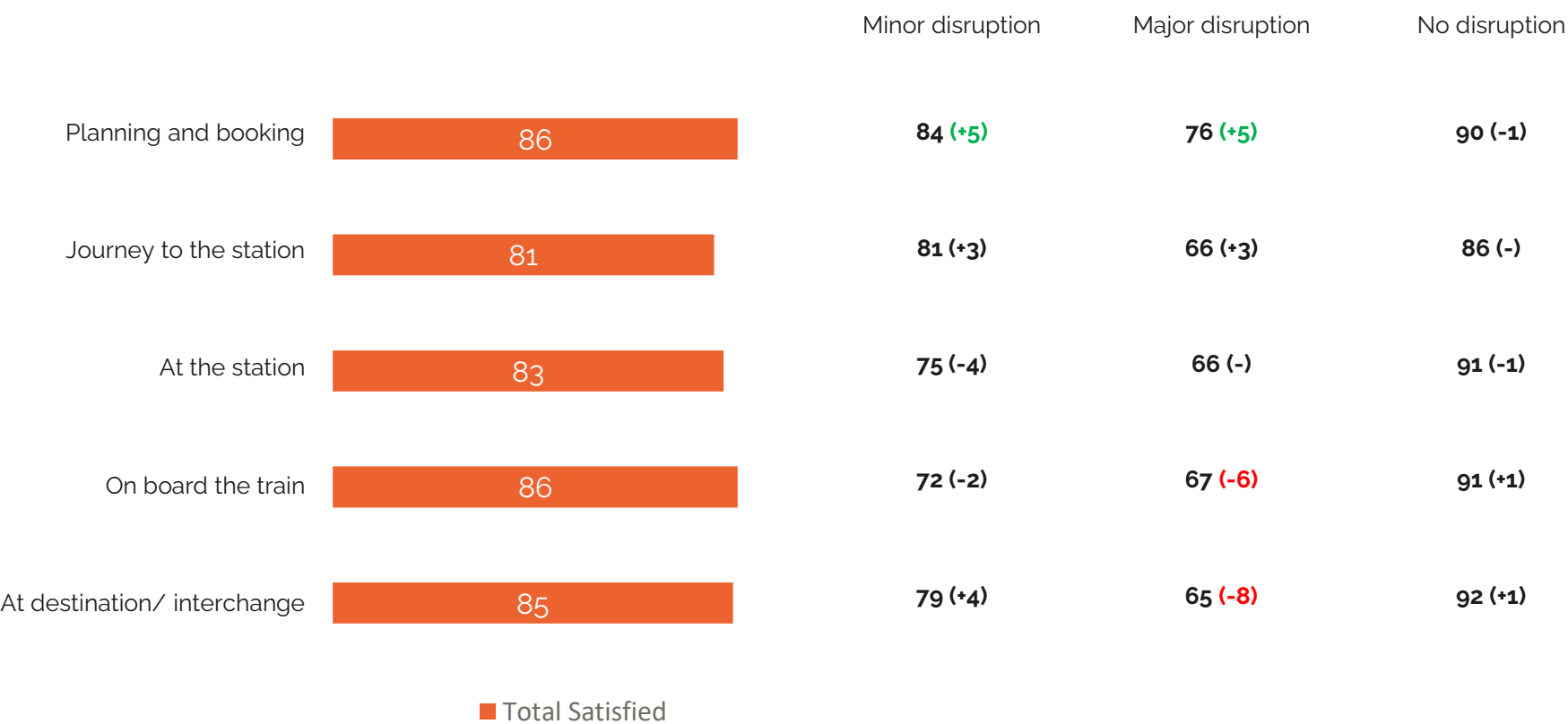
Overall satisfaction with information provided at each journey stage (%)



Overall satisfaction with aspects of information provided (2/4)

Improvements at the planning and booking stage are apparent as those disrupted are significantly more satisfied with the information at this stage, suggesting early information is crucial for making their experience better. However, it appears information in the latter stages of the journey (on board and at the destination/interchange) among the majorly disrupted has worsened.

Overall satisfaction with aspect of information provided during the journey by disruption (%)



How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Apr-Jun 23 (Overall/Minor/Major/No disruption) – planning and booking (2555/436/524/1595), journey to station (2377/432/484/1461), at the station (2522/443/464/1615), onboard the train (1952/253/224/1475), at destination/interchange (2351/430/391/1530)

Overall satisfaction with aspects of information provided (3/4)

When looking at this by passenger type, satisfaction has improved most amongst leisure passengers where all stages have improved in the information they are provided. For commuters, 'planning and booking' is the journey stage that has become significantly better on last quarter.

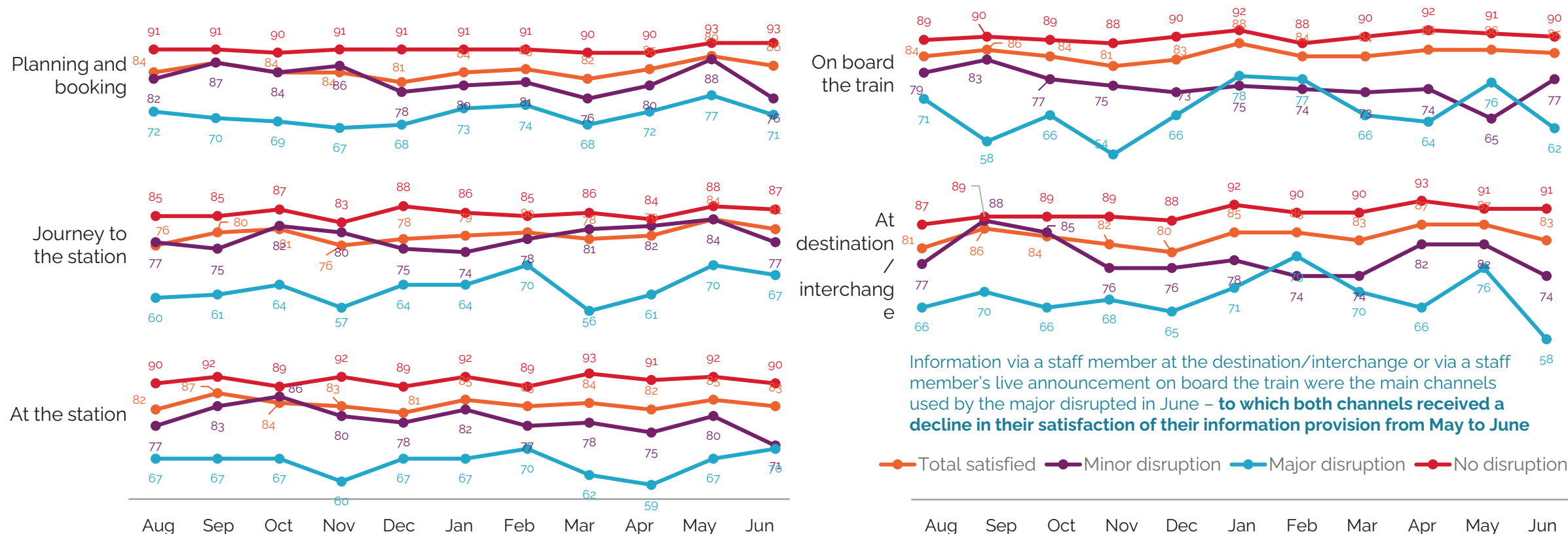
Overall satisfaction with aspect of information provided during the journey by passenger type (%)



Overall satisfaction with information provision at each journey stage (4/4)

Satisfaction amongst the non-disrupted remains consistent and higher across all journey stages month-on-month. The minor and major disrupted are more changeable. For the major disrupted, the biggest shift was from May to June, where satisfaction with information on-board the train and at destination/interchange reported figures were at their second or lowest point. This is likely driven by a weaker satisfaction of the information provided by staff members at these points.

Overall total satisfaction with information provided at each journey stage by disruption – trended (%)

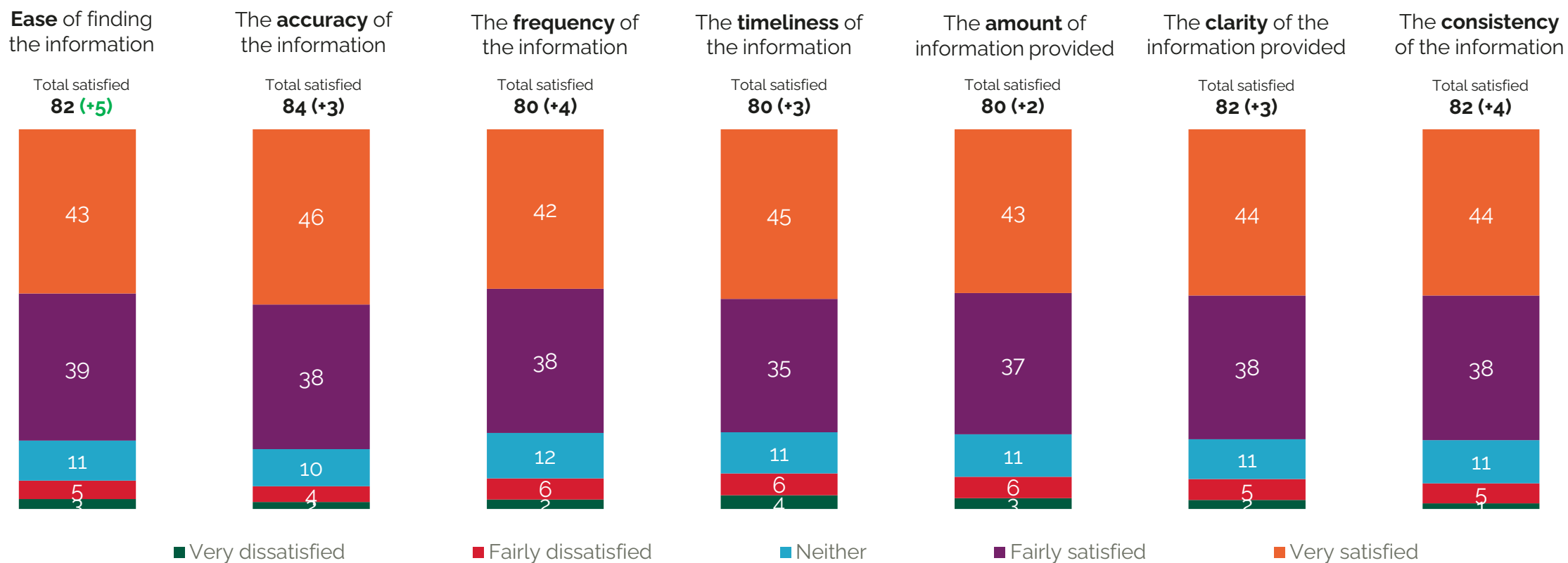


Overall, how satisfied were you with the information provided...? (excl DK) Aug/Sept/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23– planning (1436/1062/834/815/847/821/716/873/780/773/1002), journey to station (1297/957/788/746/770/742/668/779/724/732/921), at the station (1365/1042/813/797/815/787/697/851/776/759/987), onboard the train (972/829/433/609/596/593/529/698/603/585/764), at destination/interchange (1253/968/754/729/753/728/672/792/715/713/923).

Overall satisfaction with aspects of information provided (1/5)

At an overall level, satisfaction continues to improve and remains high for all aspects of information provided and in line with each other, particularly after a significant improvement for 'ease of finding the information'. This is positive news as research conducted by Transport Focus on passenger satisfaction suggests consistency, timeliness and accuracy drive greater levels of satisfaction and making this easy to find will only benefit the passenger experience.

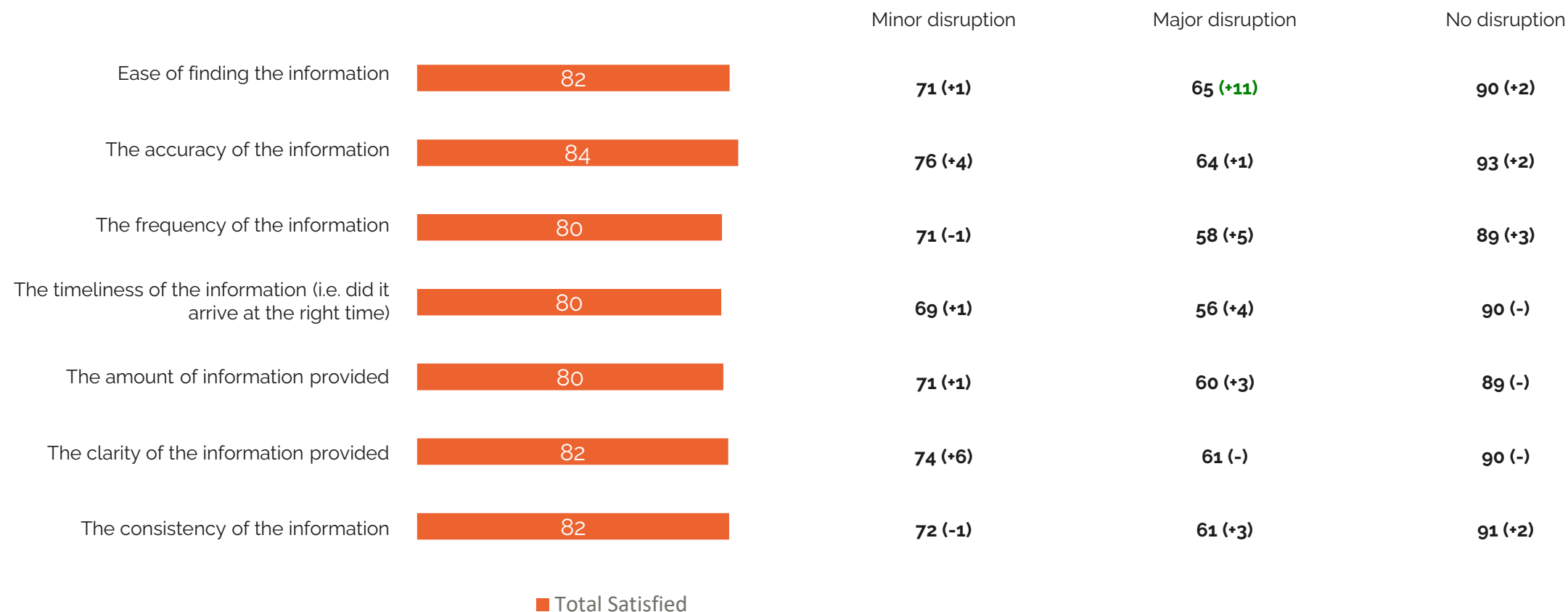
Overall satisfaction with aspect of information provided during the journey (%)



Overall satisfaction with aspects of information provided (2/5)

Ease of finding information has improved most among the major disrupted (up 11% points), and frequency seems to be improving which is important given it's one of the most desired aspects for future information about delays (as seen on slide 74).

Overall satisfaction with aspect of information provided during the journey by disruption (%)

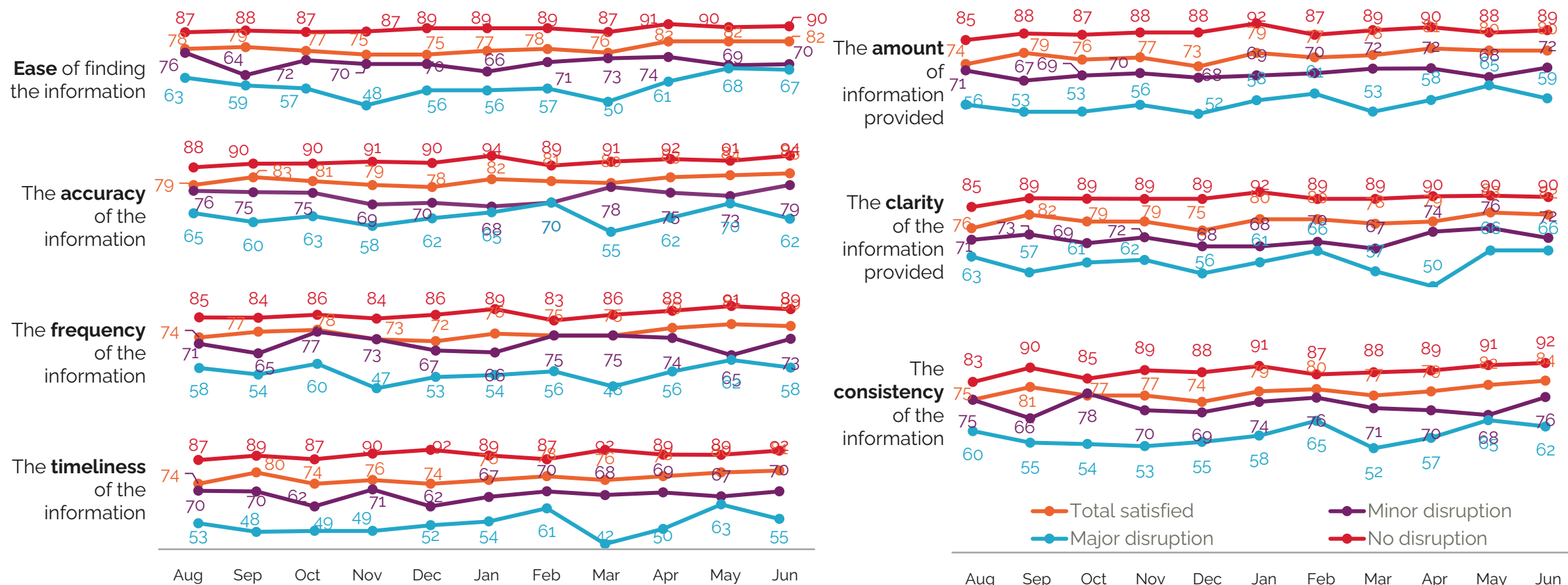


How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Jan-Mar 23 (Overall/Minor/Major/No disruption) – ease (2622/446/533/1643), accuracy (2623/442/536/1645), frequency (2622/445/531/1646), timeliness (2622/443/535/1644), amount (2623/445/535/1643), clarity (2627/444/538/1645), consistency (2622/443/534/1645).

Overall satisfaction with aspects of information provided (3/5)

Month on month satisfaction has improved at an overall level across the aspects of information provided. This is driven predominantly by improved opinions among the major disrupted after their decline in satisfaction in March.

Overall satisfaction with aspect of information provided during the journey by disruption – trended (%)

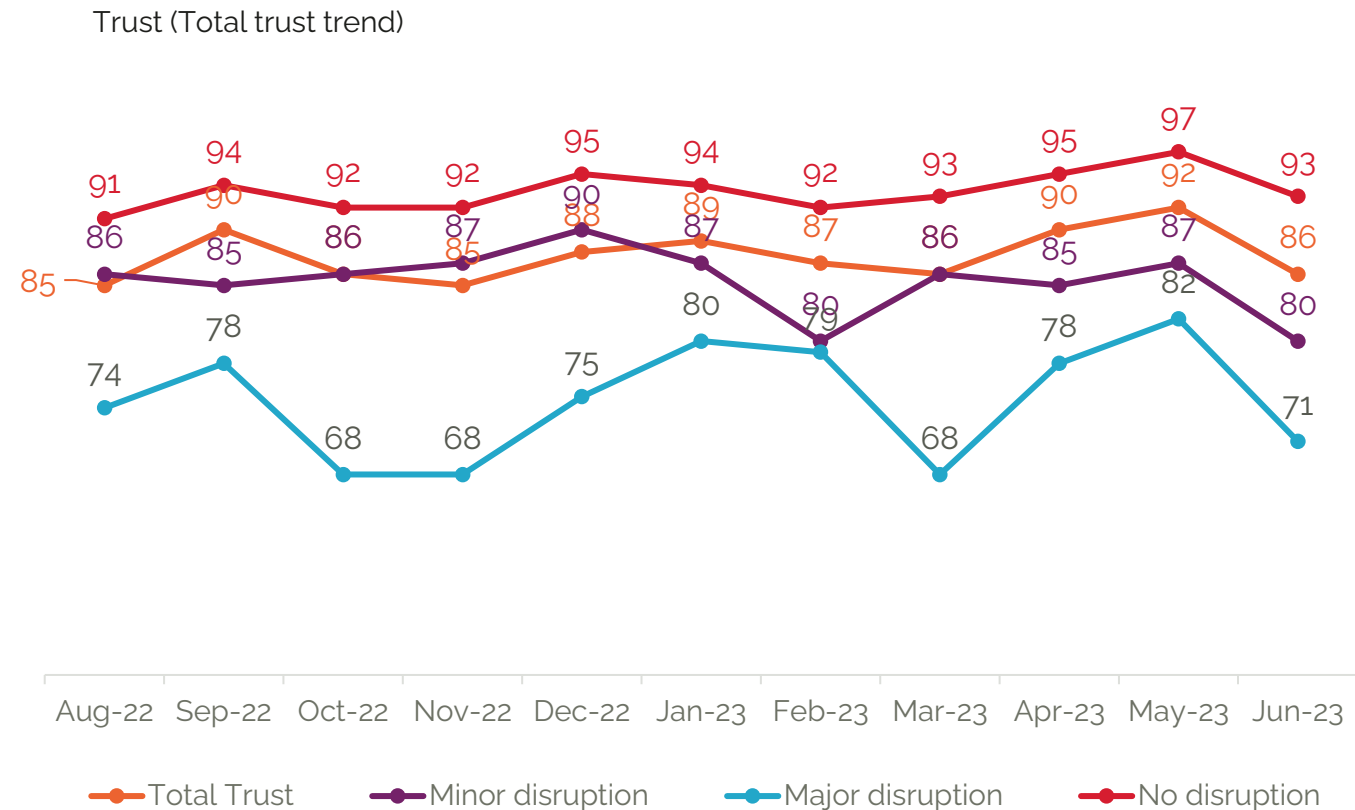
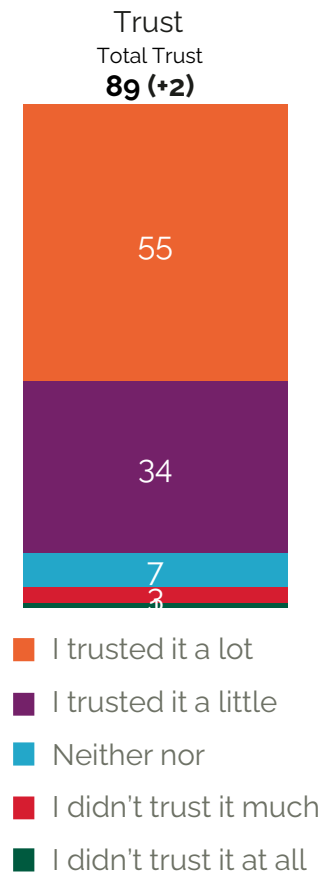


How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Aug/Sept/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – ease (1453/1077/848/822/871/852/729/887/655/645/842), accuracy (1461/1082/850/826/866/852/733/890/675/661/861), frequency (1463/1079/848/824/871/851/729/889/643/634/822), timeliness (1464/1079/852/826/873/852/734/889/636/631/817), amount (1464/1080/853/830/870/854/735/88/652/626/831), clarity (1463/1073/846/831/871/850/729/891/652/652/843), consistency (1462/1079/848/823/869/855/731/890/650/645/853)

Rating of trustworthiness of information provided

Almost 9 in 10 (89%) rail passengers stated they trusted the information provided to them – maintaining an upward trend for another quarter. This being said, on a month-to-month basis, June saw a decline in the ratings of trustworthiness across the disruption types.

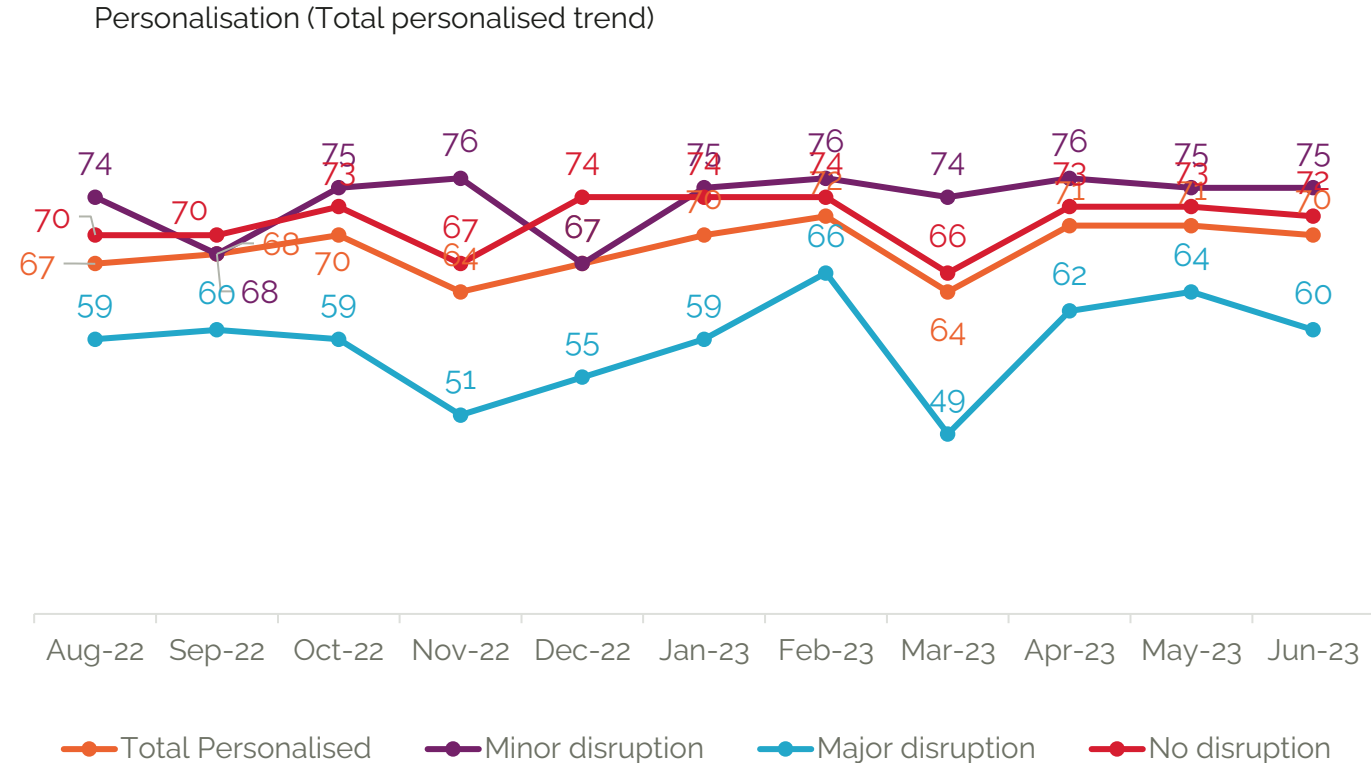
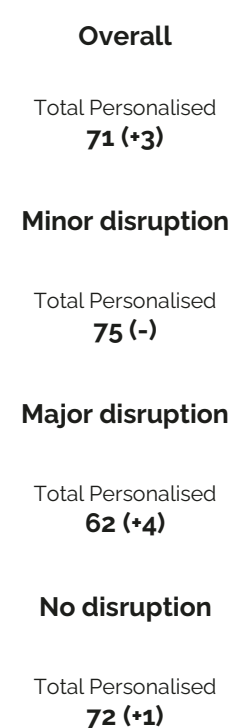
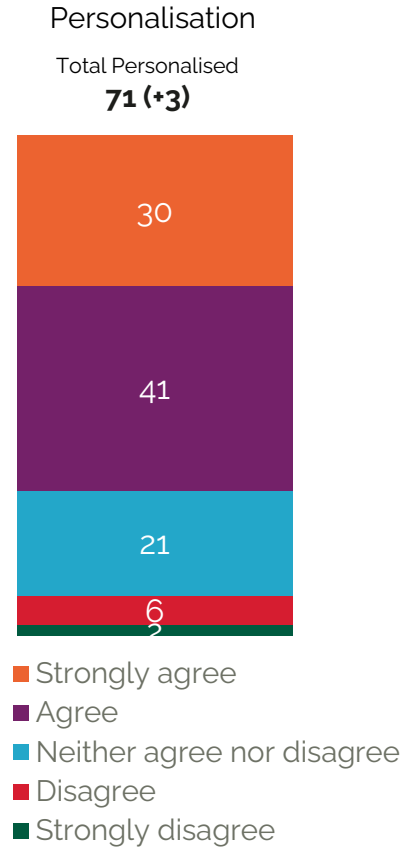
Overall rating of trustworthiness of information provided by disruption (%)



Rating personalisation of the information provided

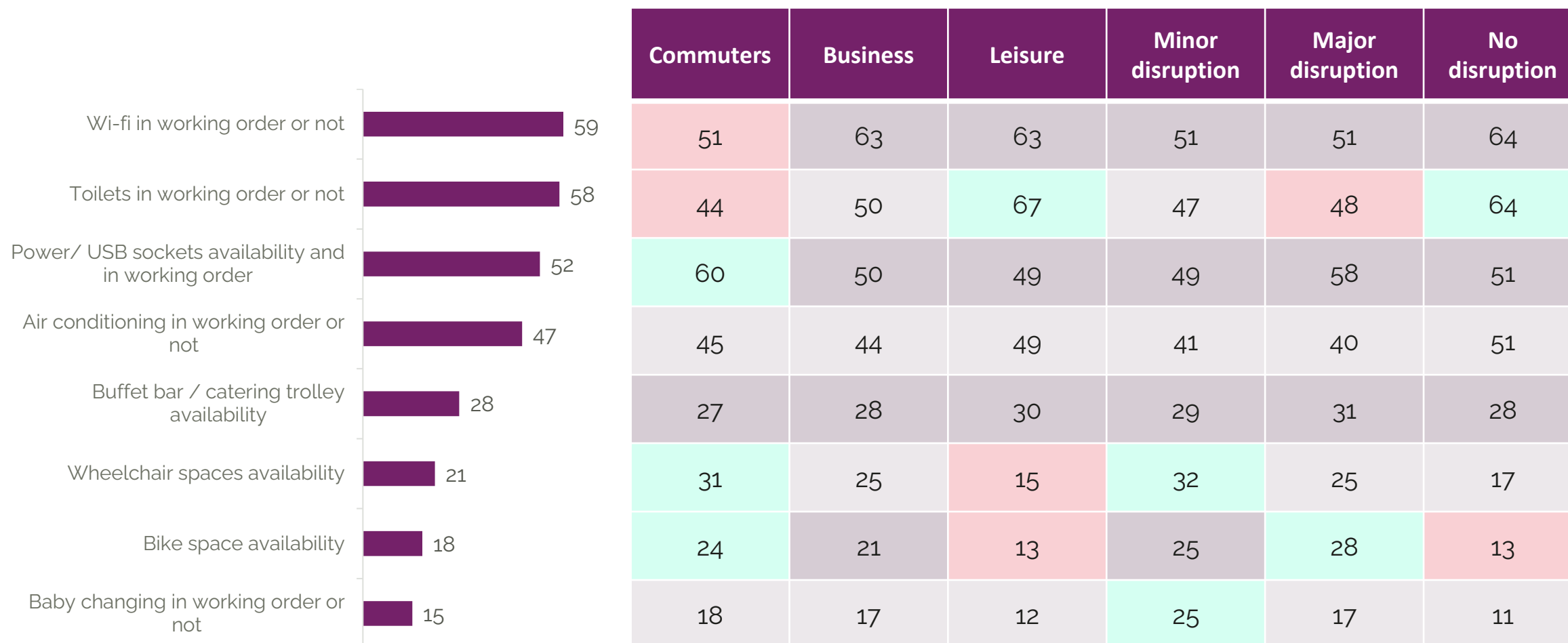
7 in 10 (71%) perceive the information to be personalised to them. Slide 78 conveys that personalising to the journey can benefit passengers by providing them with exact details that are relevant to their journey to help with further travel. This is especially true for those disrupted, of which the major disrupted have experienced an increase in the rating of information being more personalised, particularly after the steep decline recorded in March.

Overall rating of personalisation of information provided (%)



Useful real-time information required by passengers

The types of information most useful to passengers to receive in real-time is whether the Wifi or toilets are in working order or not, particularly among those with no disruption and those travelling for leisure. Power socket availability is more of a priority among commuters, where work needs might factor into this priority, and the major disrupted who due to the length of delay may require sockets in order to charge their devices.





Planning and booking

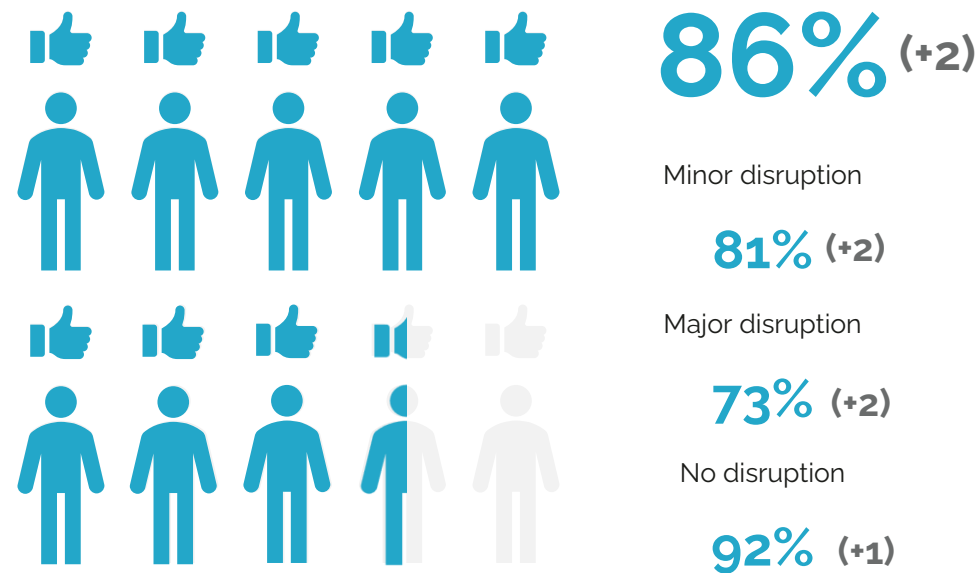
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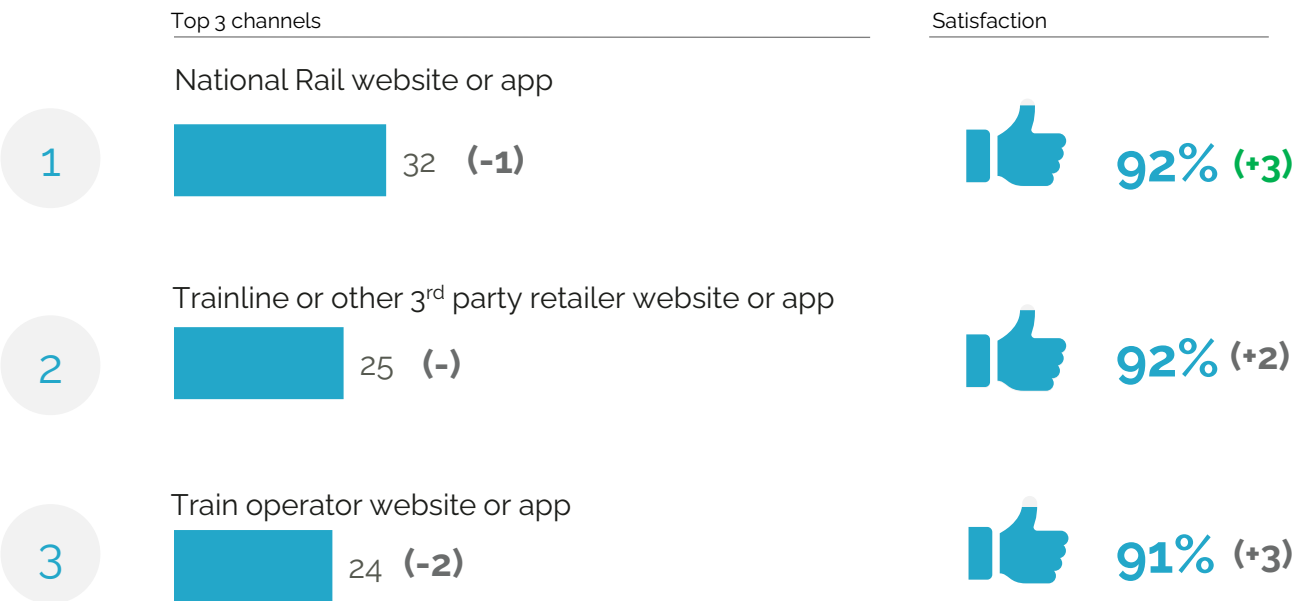
Planning and booking – Key satisfaction metrics

Rail passengers planning and booking their journeys are highly satisfied with the information provided (86%) at that stage. The main sources of information used were the National Rail website or app (32%), Trainline or other 3rd party retailer website or app (25%) and the train operator website or app (24%). All three channels received high satisfaction ratings between 91%-92% (an increase on last quarter).

Overall, this quarter, passengers gave a satisfaction (with information provided) percentage of :



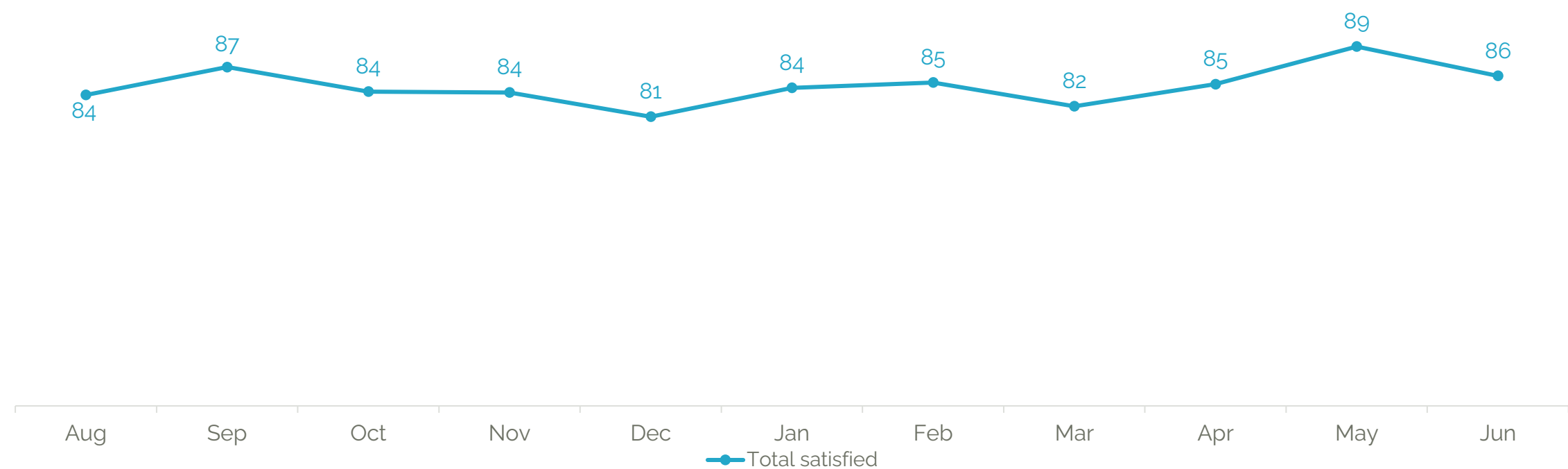
Top 3 channels used during planning and booking and their satisfaction (%):



Overall satisfaction with information provided when planning and booking

Since the dip in March, satisfaction with information provided at the planning and booking stage has increased to its highest point yet in May, where 9 in 10 (89%) were satisfied with the information at this stage during this month. Positively, significantly more of the general population were aware of the May strikes (as conveyed in the latest General Public Tracker), which will have helped support those planning their journeys.

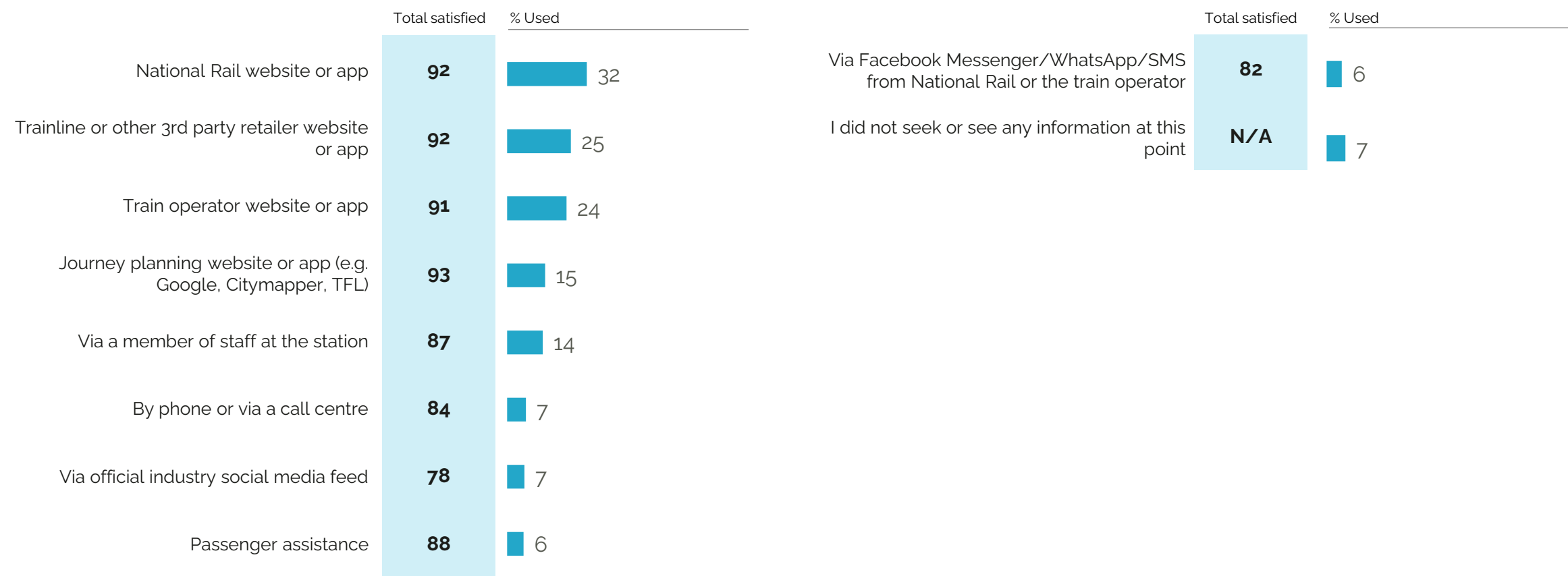
Overall satisfaction with information provided when planning and booking – trended (%)



Information channels used and their satisfaction

As with previous quarters, the higher used information channels when planning and booking journeys received higher satisfaction ratings than some of the other lower incidence ones, such as via Facebook messenger/Whatsapp/SMS and via a social media feed.

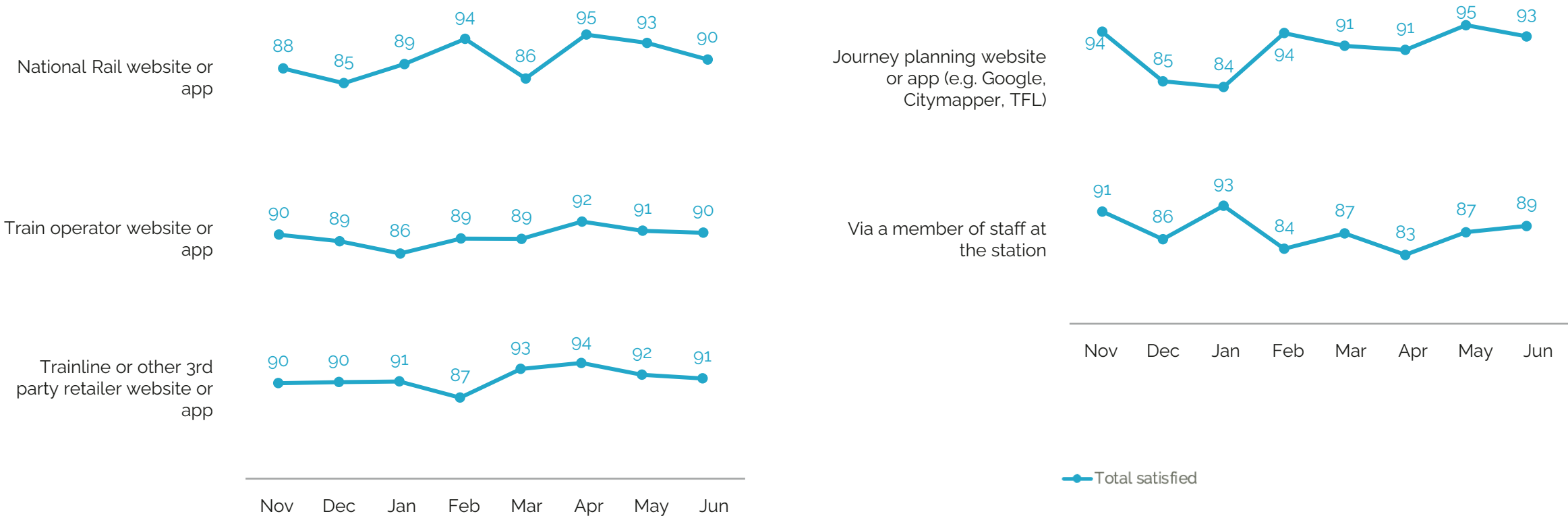
Information channels used and satisfaction with each when planning and booking a journey (%)



Satisfaction with information channels

After the declines observed in March, all the top 5 used channels saw an increase in the satisfaction of the information they provide, with the top four averaging above 90% showing websites and apps are crucial at this stage and are succeeding in their delivery of this information.

Satisfaction of information channels when planning and booking a journey – trended (%)
(Top 5)

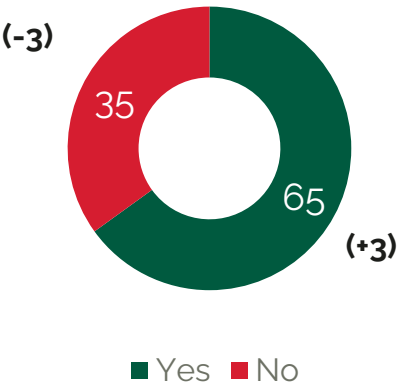


How satisfied were you with the information that was provided on the channels you used when planning and booking your journey? (excl DK) Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 - National rail website or app (250/264/290/236/275/246/249/308), Train operator website or app (204/223/217/187/266/204/173/286), Trainline or other 3rd party retailer website or app (258/236/220/204/239/217/240/270), Journey planning website or app (94/103/121/94/100/85/114/129), Via a member of staff (111/112/126/105/119/124/109/146)

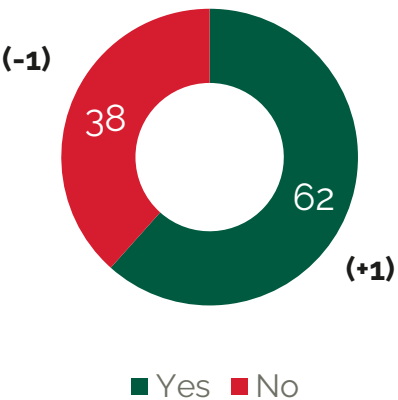
Information about facilities available

Around 2 in 3 customers found information about the facilities at the station or on board the train before they departed. For information about station facilities, this continues to be useful to passengers (stable at 90%). Passengers are most appreciative of being informed of facilities at both points in the journey, nevertheless trains are performing better at informing about facilities on board this quarter.

Found information about the facilities available **at the station** (%)



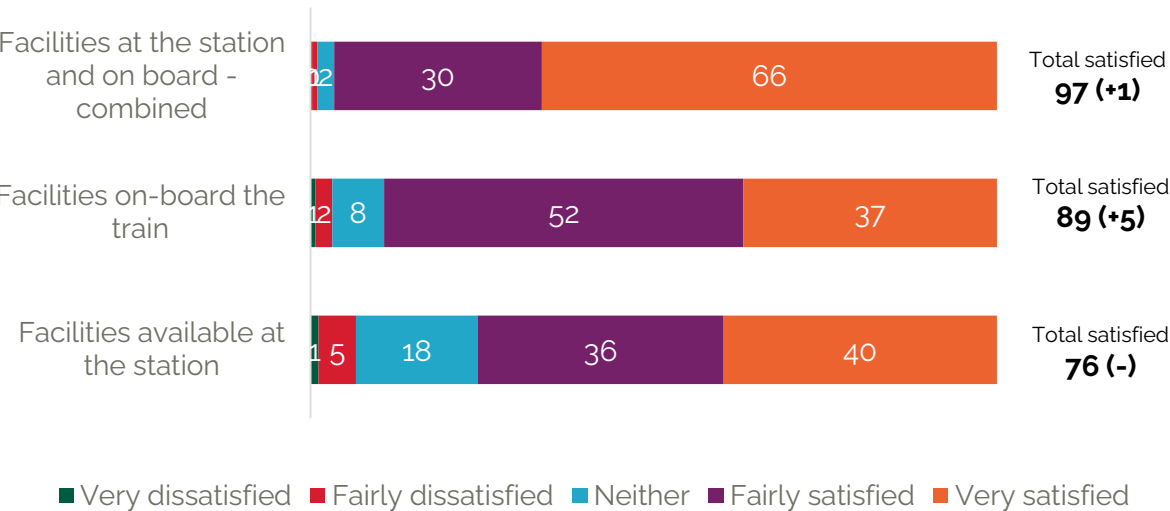
Found information about the facilities available **on board the train** (%)



Usefulness of information about the facilities at the station (%)



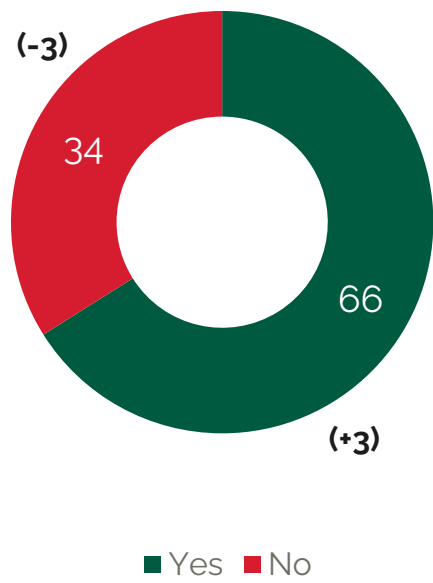
Satisfaction of information about the facilities available* (%)



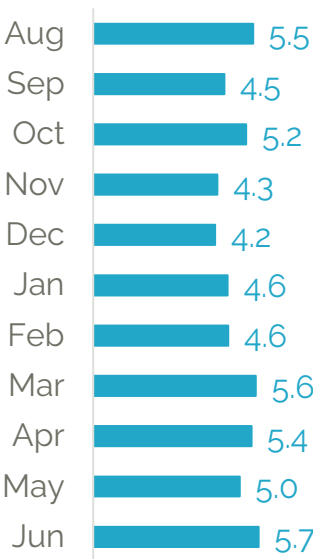
Changes to train times

Also, a third of passengers received information relating to changes to train times at the planning and booking stage which was received, on average, around 5 days in advance. Looking at the trends, the types of information passengers are receiving in advance is improving.

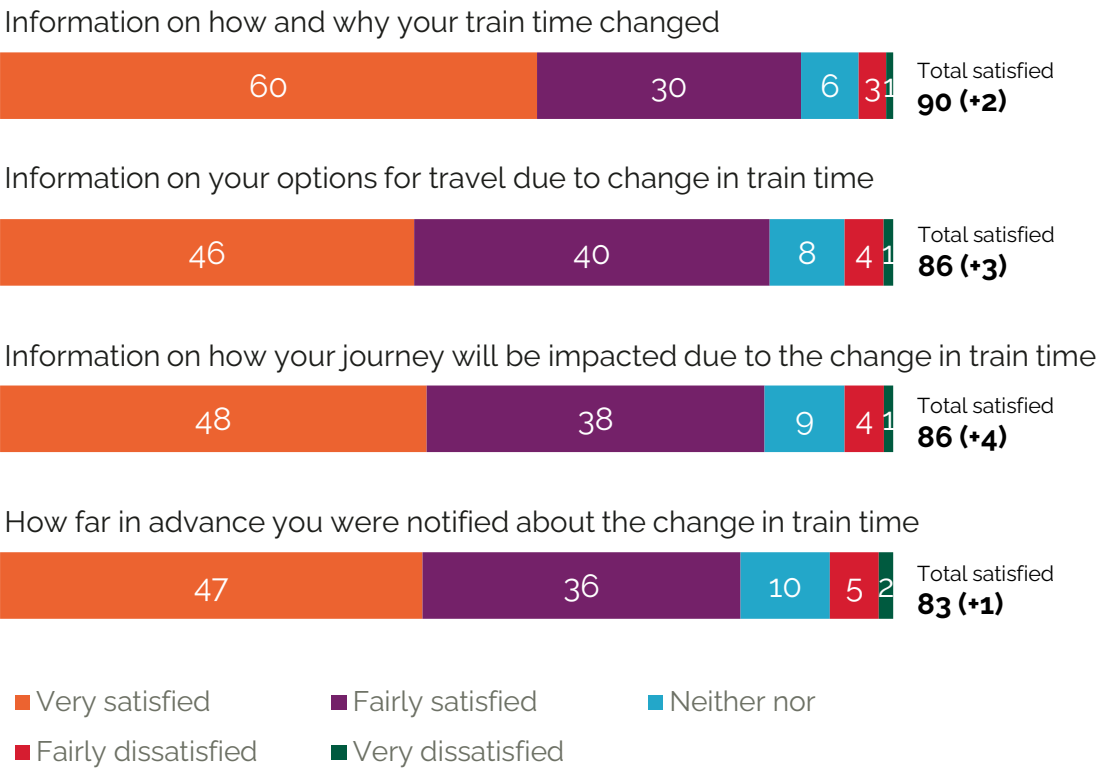
Found changes to train times (%)



Average time information about the change to train times is received before journey (days)



Satisfied with the following (%)



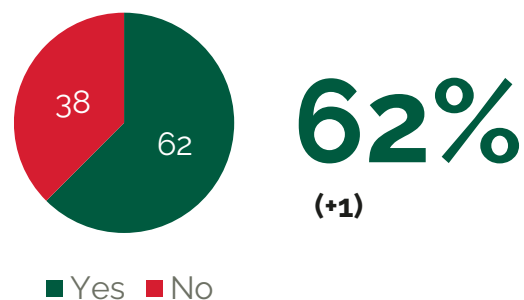
Date provision and seat availability for advance ticket booking

Of those who received information on dates available for advance ticket booking (67%), passengers continue to be very positive about the range of information and how well they were kept informed about the dates available (87%-92%). 6 in 10 receive information on seat availability and 89% are satisfied with this information. Ensuring the pre-booked element of a journey is up to expectations is a key driver of journey satisfaction* and so it's crucial this remains high.

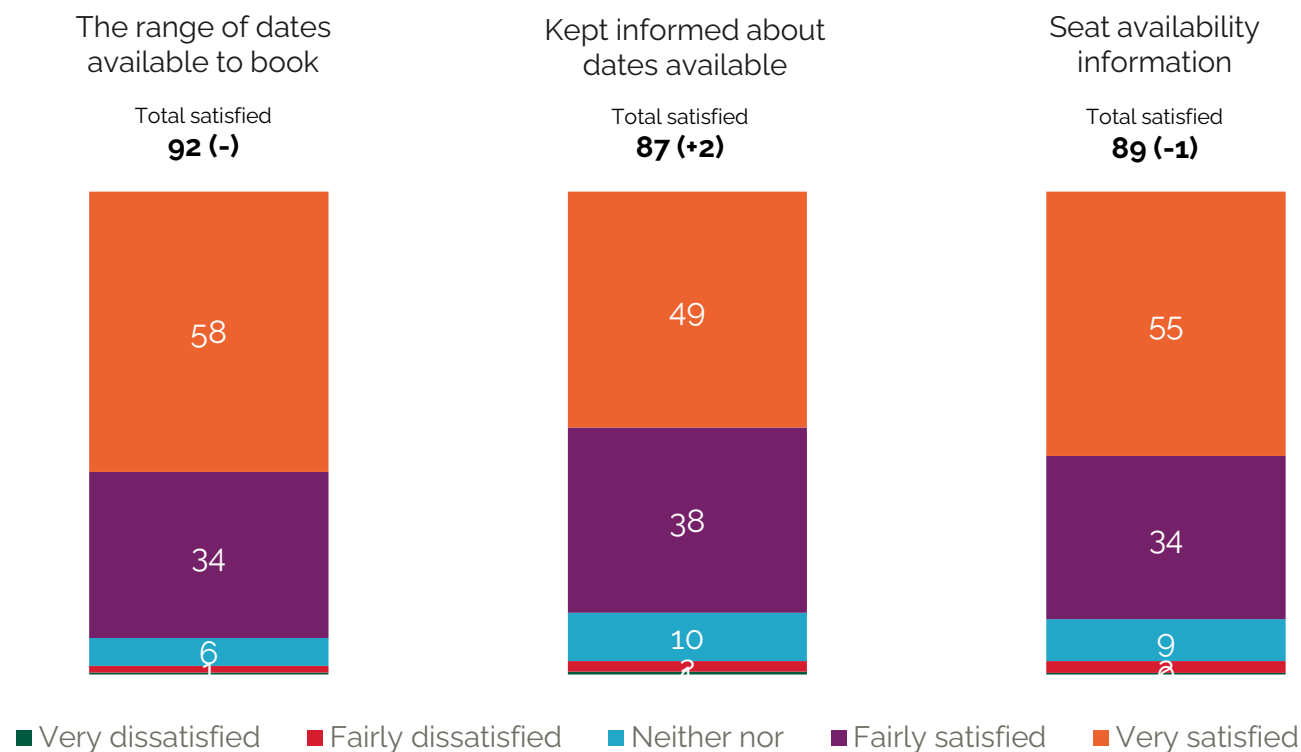
Found list of dates currently available for advance ticket booking (% yes)



Found seat availability on the train (% yes)



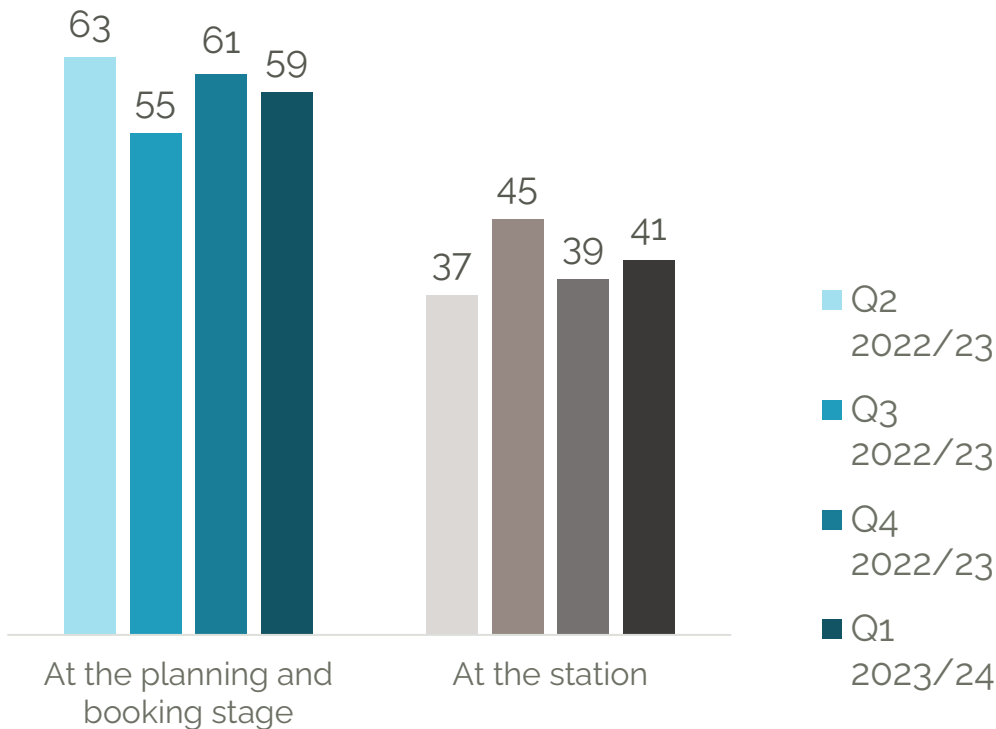
Satisfaction with advance booking information and seat availability (%)



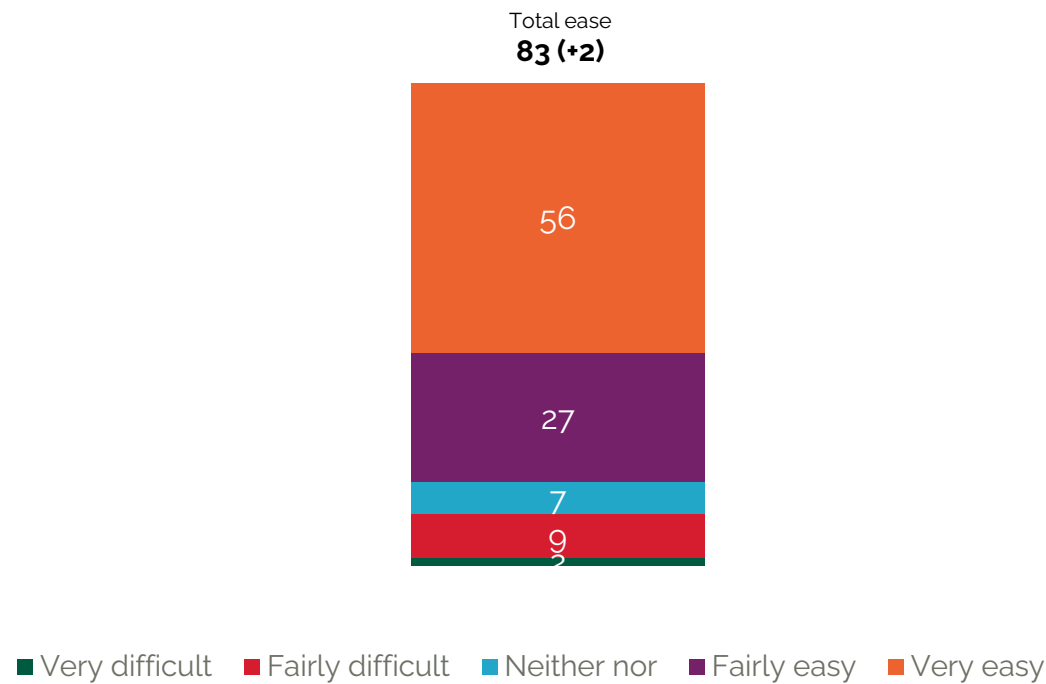
Stage informed about rail replacement bus and ease in finding such information

Some passengers had to take a rail replacement bus as part of their journey- slightly fewer than last quarter. Nevertheless, now more than half of those who receive this information found it 'very easy' to know where the bus replacement would be located.

Stage at which passengers were informed about the rail replacement bus (%)



Ease with finding information on where bus replacement is located (%)





Journey to the station

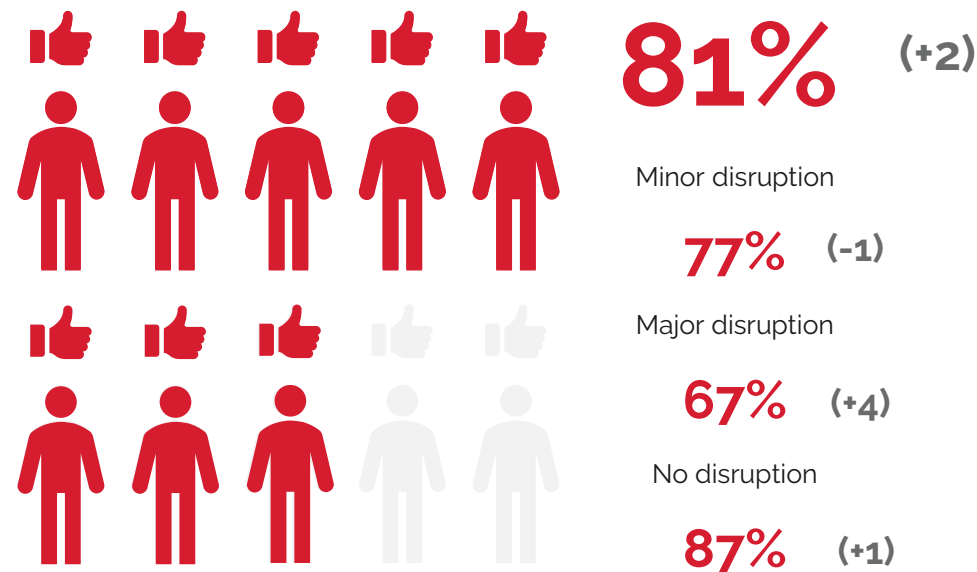
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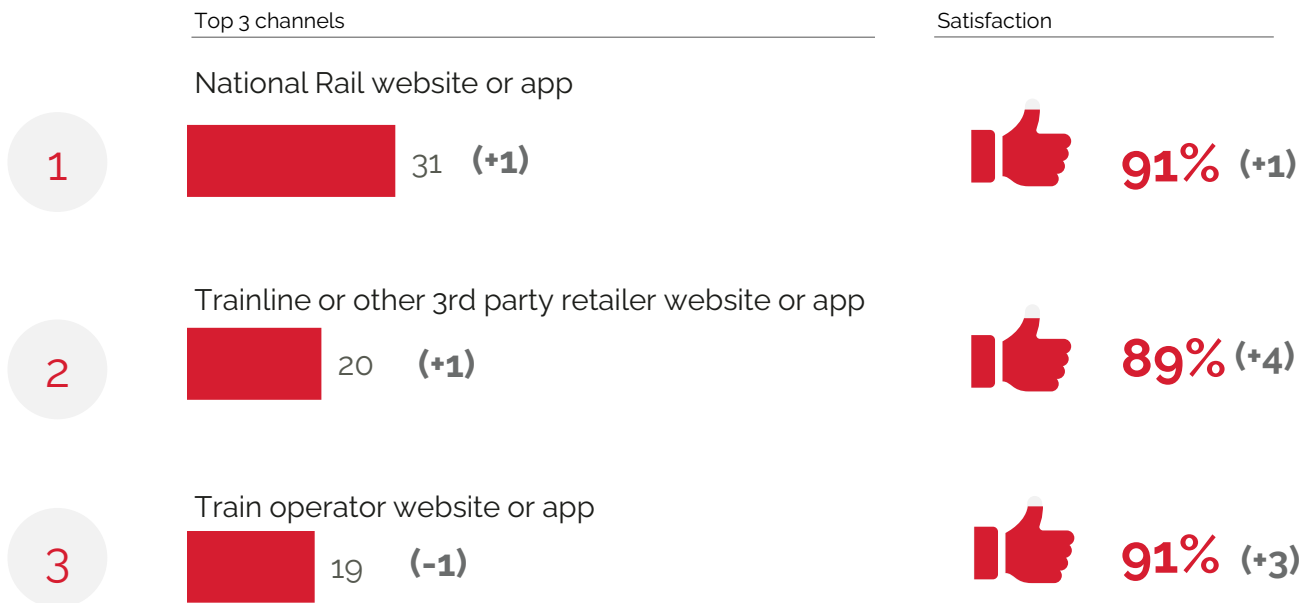
Journey to the station – Key satisfaction metrics

Consistent with last quarter, 81% of rail passengers on their way to the station were satisfied with the information provided – marginally lower than other journey stages. At this point, the most used channel is the National Rail website or app (31%), followed by Trainline or other 3rd party retailer websites or app (20%) and the train operator website or app (19%). Around 9 in 10 were satisfied with the information they received on these channels.

Overall, this quarter, passengers gave a satisfaction (with information provided) percentage of:



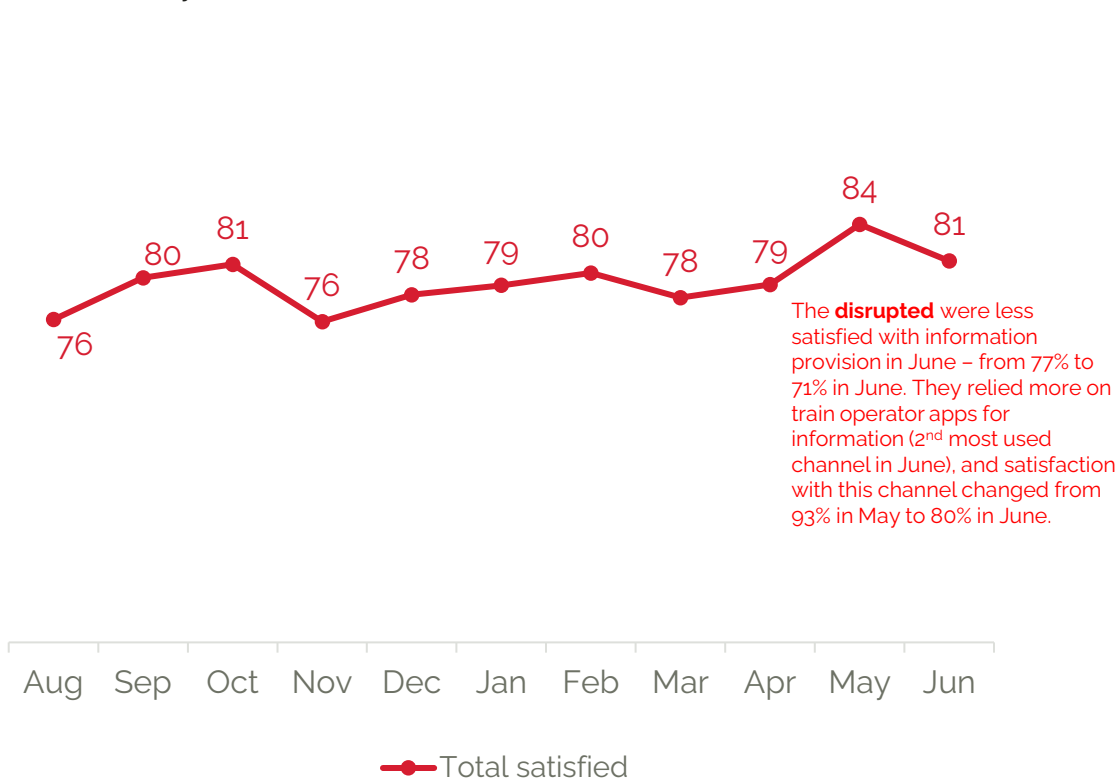
Top 3 channels used and their satisfaction (%):



Overall satisfaction with information provided and information channels used when making the journey to the station

Satisfaction with information on the journey to the station continued to improve through Q1 23/24, hitting its highest point in May 2023 (84%). This then drops in June, which is driven by the perceptions of the disrupted (possibly due to the June strikes). Of the channels used at this stage, National Rail website or app is the most used channel for information. As with other stages, satisfaction of lower incidence channels appears to be lower.

Overall satisfaction with information provided when making the journey to the station – trended (%)



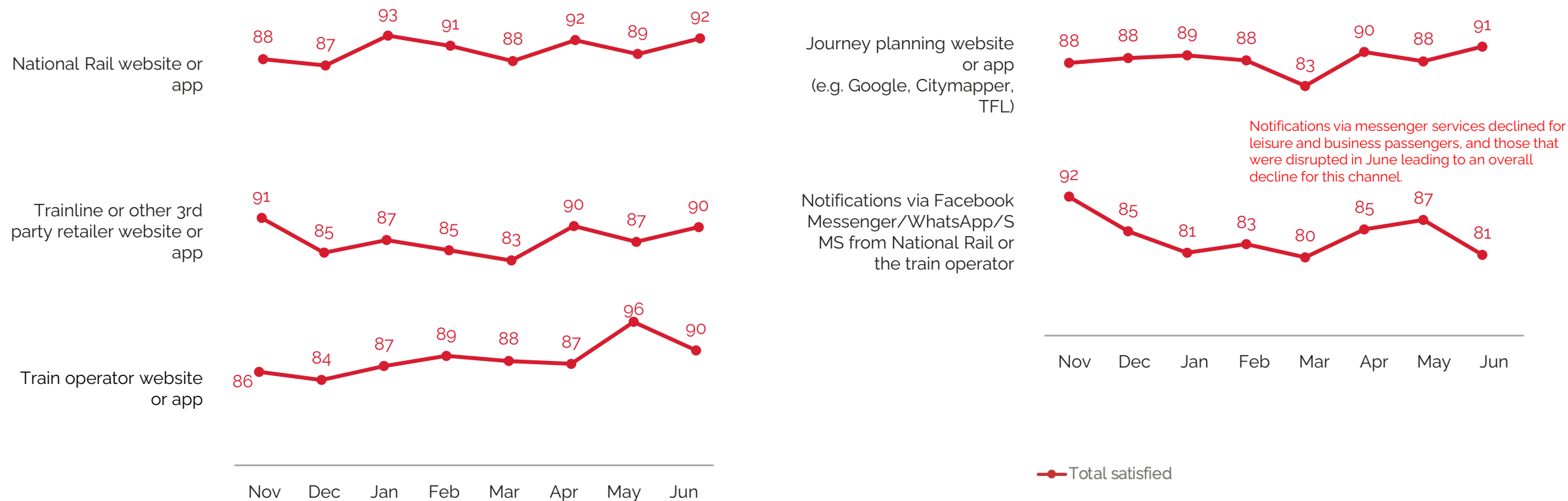
Information channels used and satisfaction with each when making the journey to the station (%)

	Total satisfied	% Used
National Rail website or app	91	31
Trainline or other 3rd party retailer website or app	89	20
Train operator website or app	91	19
Journey planning website or app (e.g. Google, Citymapper, TFL)	89	18
Notifications via Facebook Messenger/WhatsApp/SMS from National Rail or the train operator	84	11
Via official industry social media feed	81	10
I did not seek or see any information at this point	N/A	20

Satisfaction with information channels

Majority of the top 5 used channels continue to improve or remain consistent with earlier reported figures. Train operator apps made a huge progress in May, though these efforts were hampered after the disrupted were less satisfied with its information provision in June. On a similar vein, notifications via messenger services did not perform as well in June after declines among leisure, business and disrupted passengers.

Satisfaction of information channels when making the journey to the station – trended (%)
(Top 5)



How satisfied were you with the information that was provided on the channels you used when on your way to the station? (excl DK) Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 - National rail website or app (255/269/230/197/214/240/250/303), Train operator website or app (140/150/134/133/149/150/148/216), Trainline or 3rd party website or app (195/175/131/144/152/159/196/227), Journey planning website or app (e.g. Google, Citymapper, TFL) (106/143/133/95/106/117/132/149), Notifications via Facebook Messenger/WhatsApp/SMS from National Rail or the train operator (78/89/86/105/79/88/96/110)



At the station

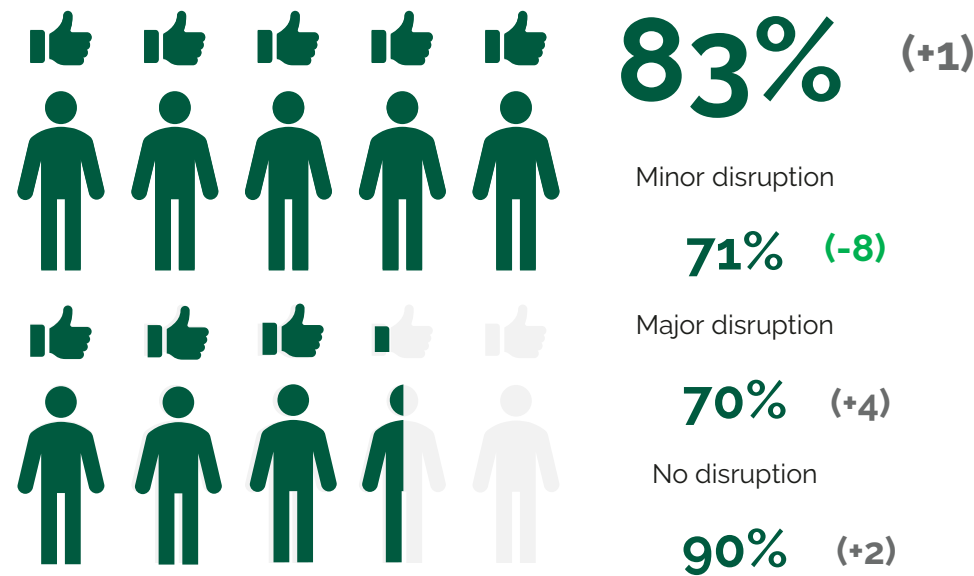
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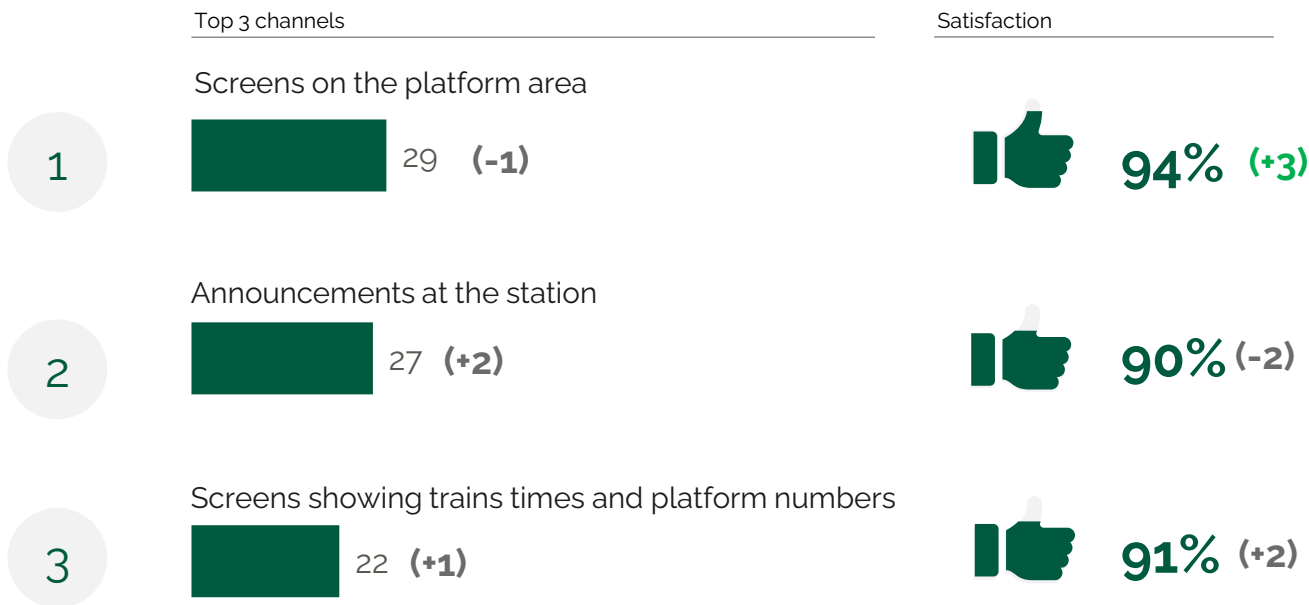
At the station – Key satisfaction metrics

At the station, 83% were satisfied with the information they are provided about their upcoming rail journey. The top 3 channels used are screens on the platform area, followed by announcements at the station and screens showing train times and platform numbers – same as the last two quarters. Satisfaction with these channels is very high – all of them are above 90%.

Overall, this quarter, passengers gave a satisfaction (with information provided) percentage of:



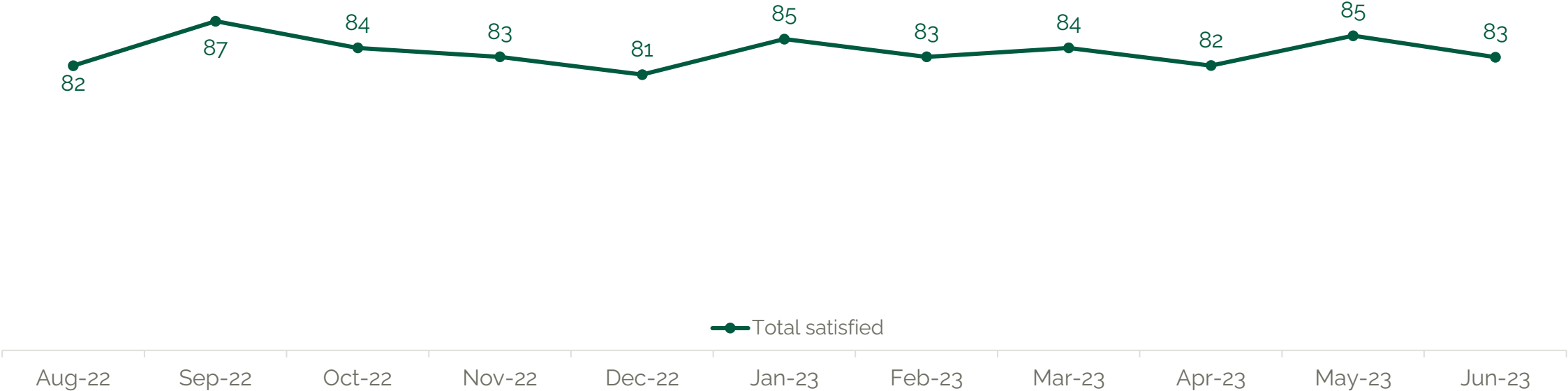
Top 3 channels used and their satisfaction (%):



Overall satisfaction with information provided when at the station

Looking at the trended satisfaction with information provided when at the station, this is consistent with the previous two quarters.

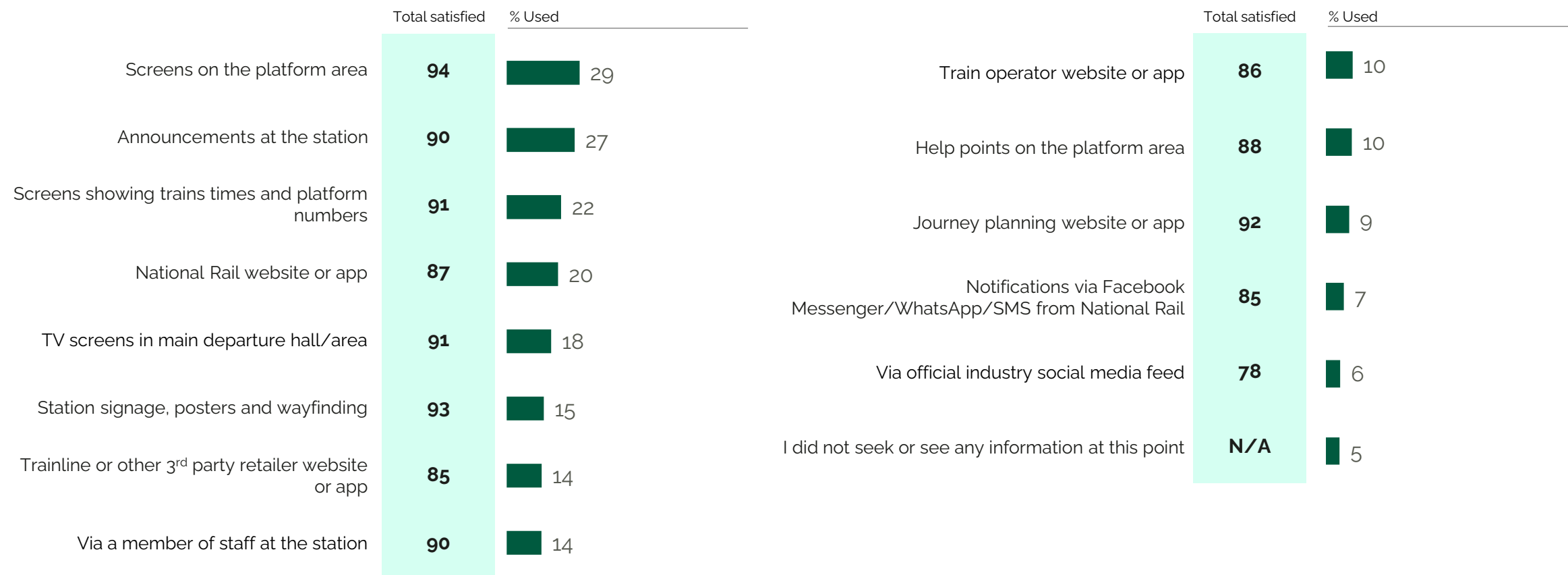
Overall satisfaction with information provided when at the station – trended (%)



Information channels used and their satisfaction

Positively, screens on the platform area is the highest used channel and achieves the highest satisfaction.

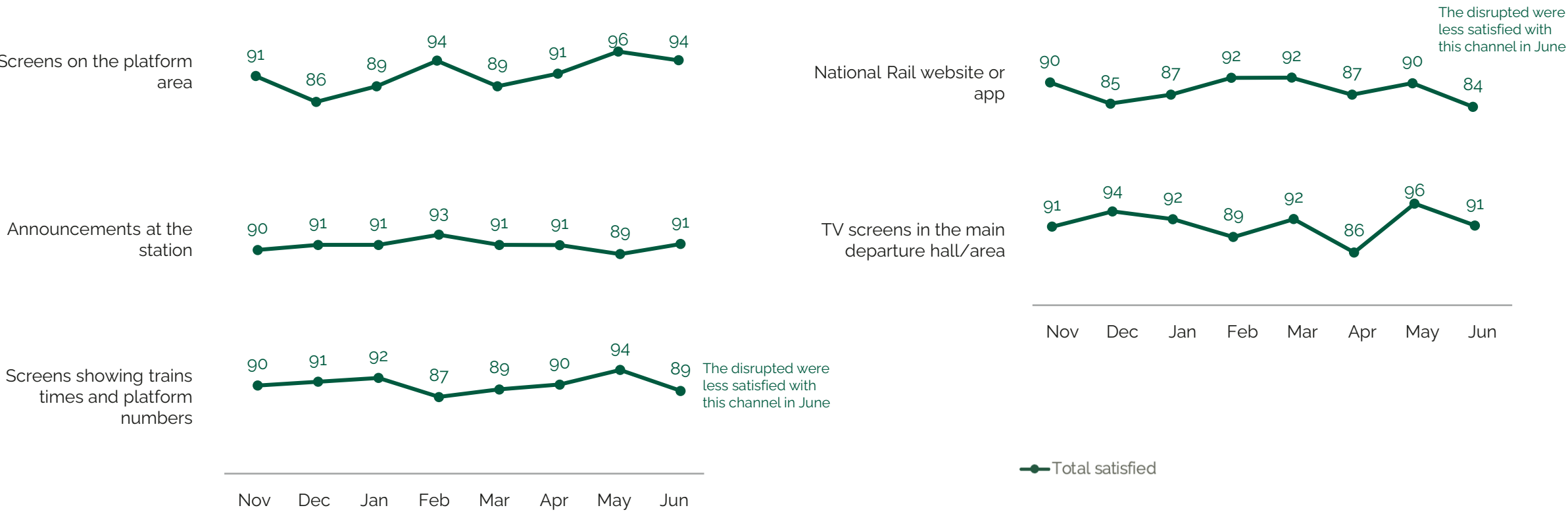
Information channels used and satisfaction with each when at the station (%)



Satisfaction with information channels

The upward trend is clear for screens on the platform area – up from 89% in March to 96% in May. The delivery of information during a disruption can have an impact on how channels perform, as it is clear for screens showing train times/platform numbers and NR website or app.

Satisfaction of information channels when at the station – trended (%)
(Top 5)



How satisfied were you with the information that was provided on the channels you used when at the station? (excl DK) Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 - Screens on the platform area (215/224/236/205/272/235/211/287), Announcements at the station (206/187/188/188/203/195/218/256), Screens showing train times and platform numbers (152/164/162/151/191/163/178/210), National Rail website or app (159/170/155/134/149/155/152/201), TV screens in the main departure hall/area (136/136/143/145/147/143/140/180)

Satisfaction with experiences at the station

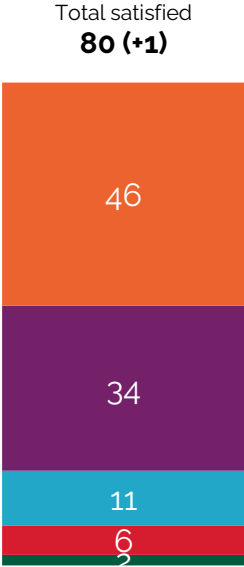
Passengers continue to be satisfied with their experiences at the station, most predominantly on the timeliness of platform information. Staff assistance also looks to be improving, with helpfulness up 3% points on last quarter after being a watch area.

Updates on the platform and train (%)

Timeliness with which platform information was announced



Kept up to date about the status of the train



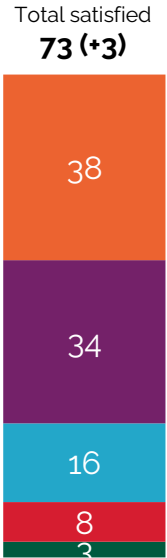
Very dissatisfied Fairly dissatisfied Neither nor Fairly satisfied Very satisfied

Staff (%)

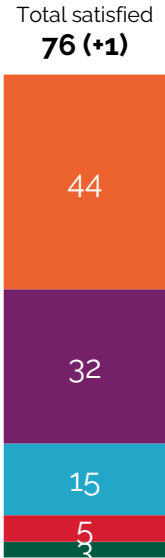
Were able to answer questions



Provided me with helpful information



Available to help me

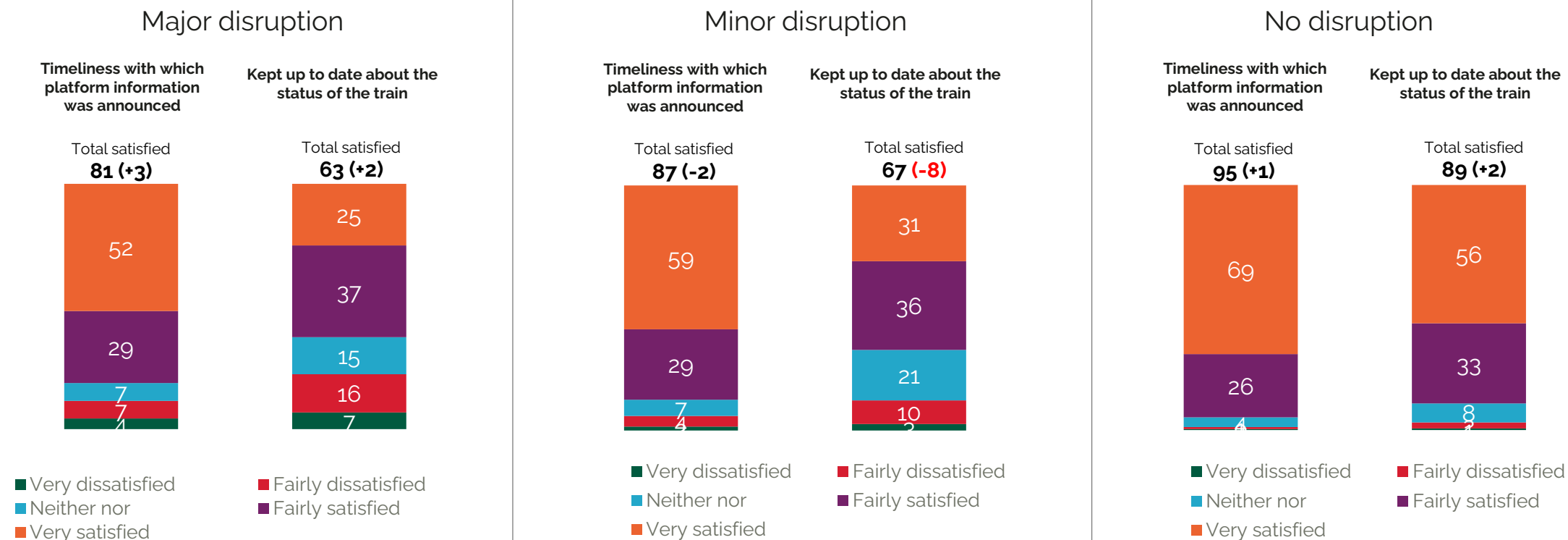


Very dissatisfied Fairly dissatisfied Neither nor Fairly satisfied Very satisfied

Satisfaction with experiences at the station – disruption type (1/2)

Positively, the major disrupted are having a better experience than last quarter, with timeliness and being kept up to date both improving. This is important as frequent updates is something that this group desire most. This was not the case for the minor disrupted, who felt the information was not handled as well whereby significantly fewer were satisfied that they were kept up to date with the status of their train.

Updates on the platform and train (%)

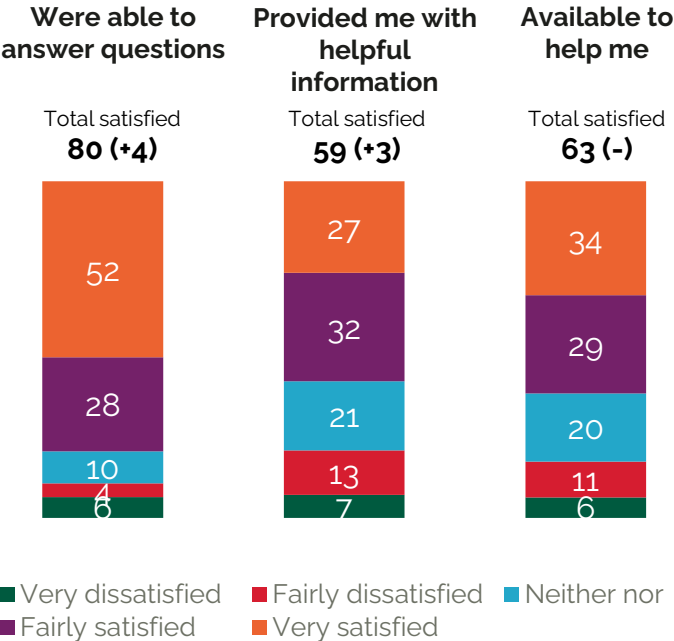


Satisfaction with experiences at the station – disruption type (2/2)

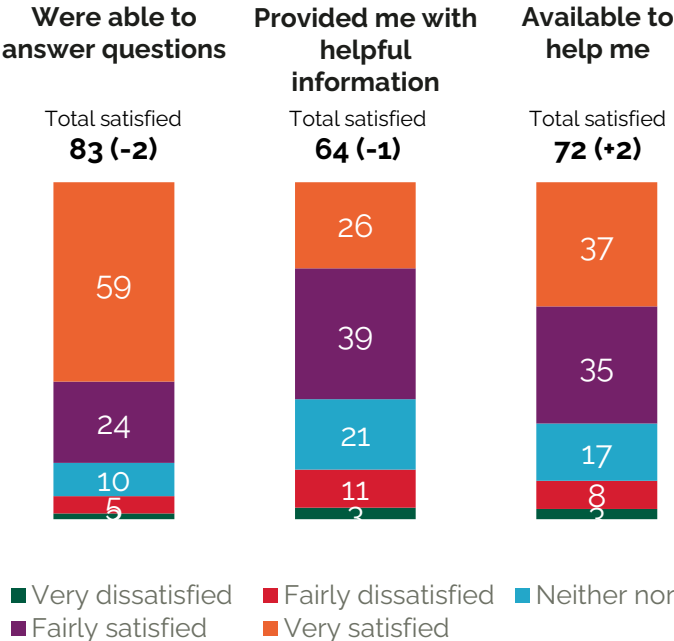
Regarding staff at the station, the non-disrupted continue to be the most satisfied. For all disruption types, staff members' ability to answer questions was the highest rated experience, while being able to provide helpful information remains an area still in need of improvement.

Staff (%)

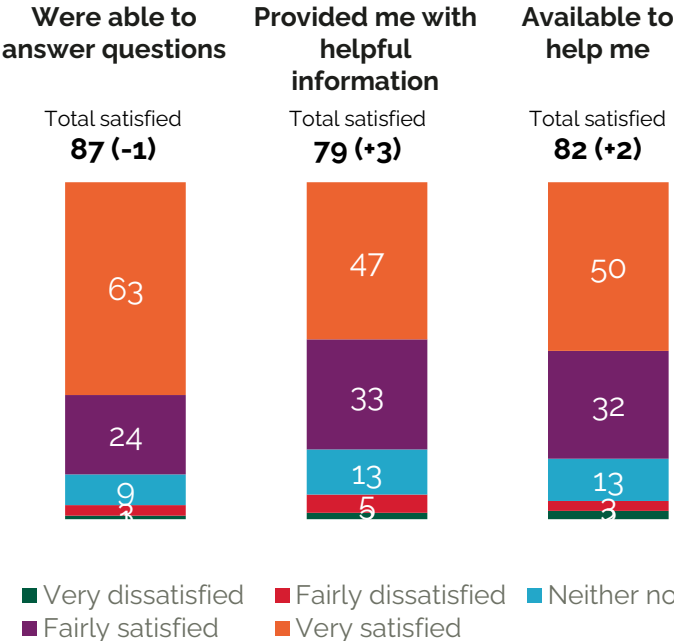
Major disruption



Minor disruption



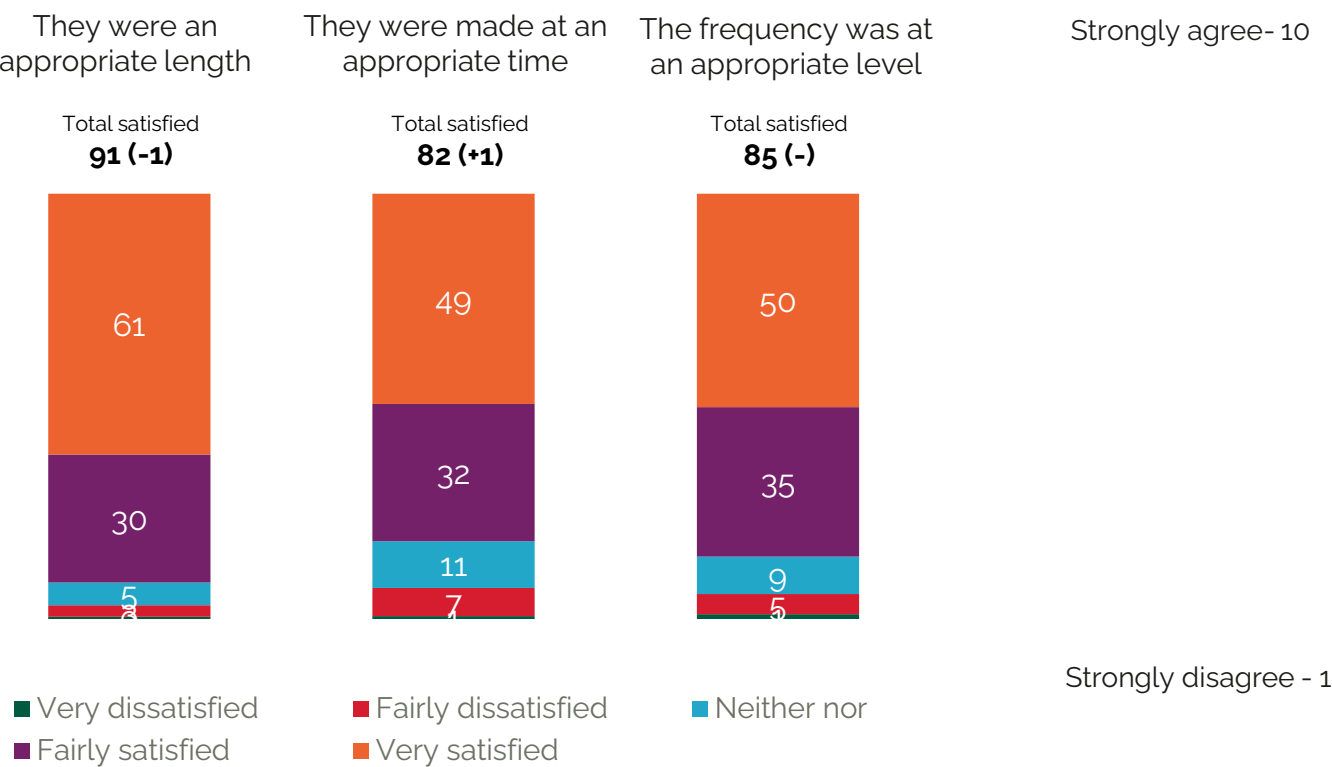
No disruption



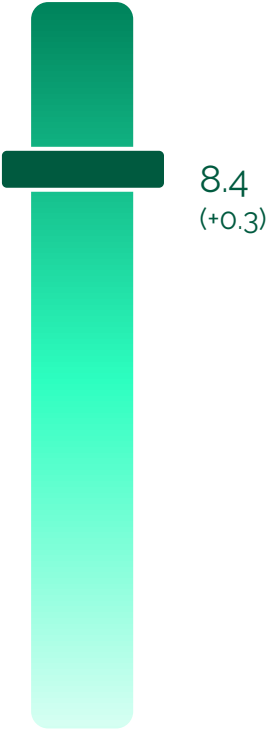
Satisfaction with and ratings of announcements at the station (1/3)

Ratings of announcements at the station are consistent with last quarter – length of the announcement and usefulness of the information are the top rated attributes experienced by passengers.

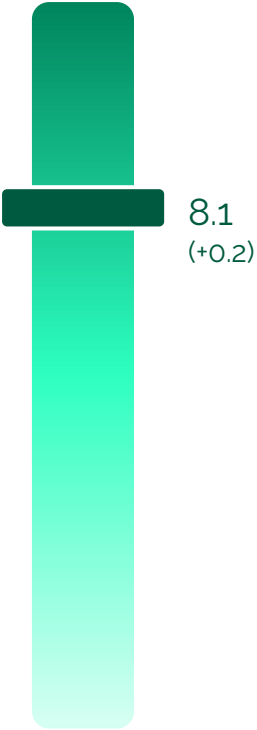
Announcements at the station (%)



Announcements are useful, they keep me informed at the right time



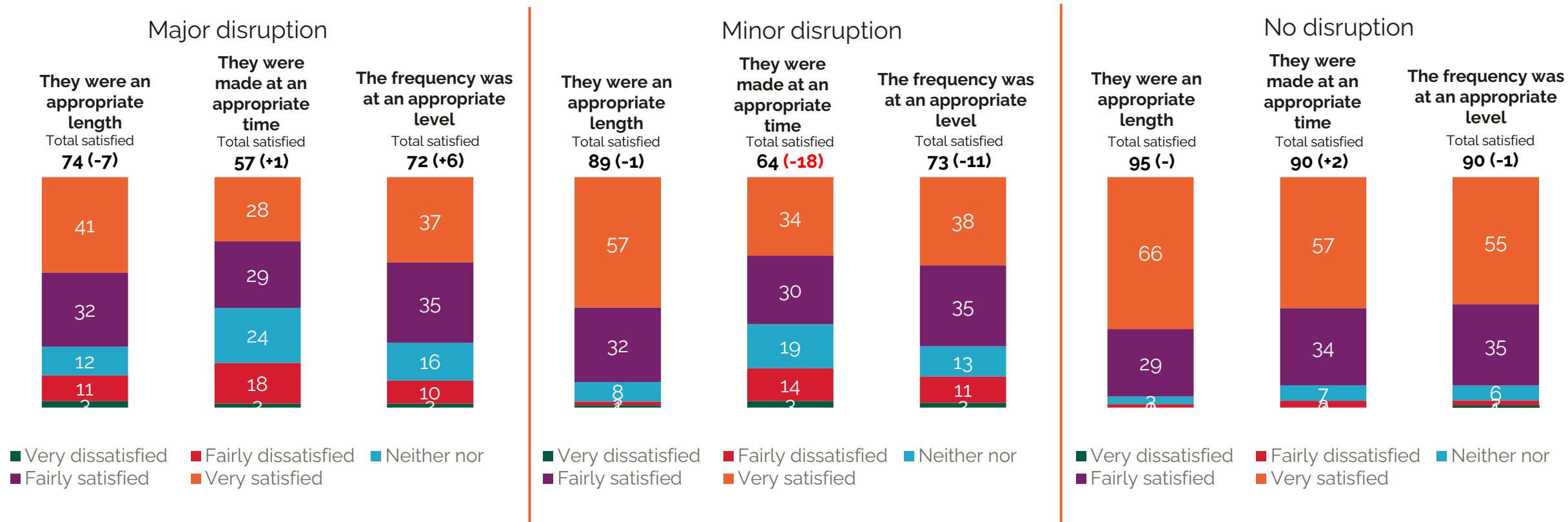
The frequency of announcements is right, they are repeated appropriately



Satisfaction with and ratings of announcements at the station (2/3)

However, the length of announcements is not appreciated by all passengers – for the major disrupted this is not long enough. The split by disruption also conveys that timing and frequency are essential, as those with a minor disruption convey a significantly higher level of dissatisfaction compared to last wave.

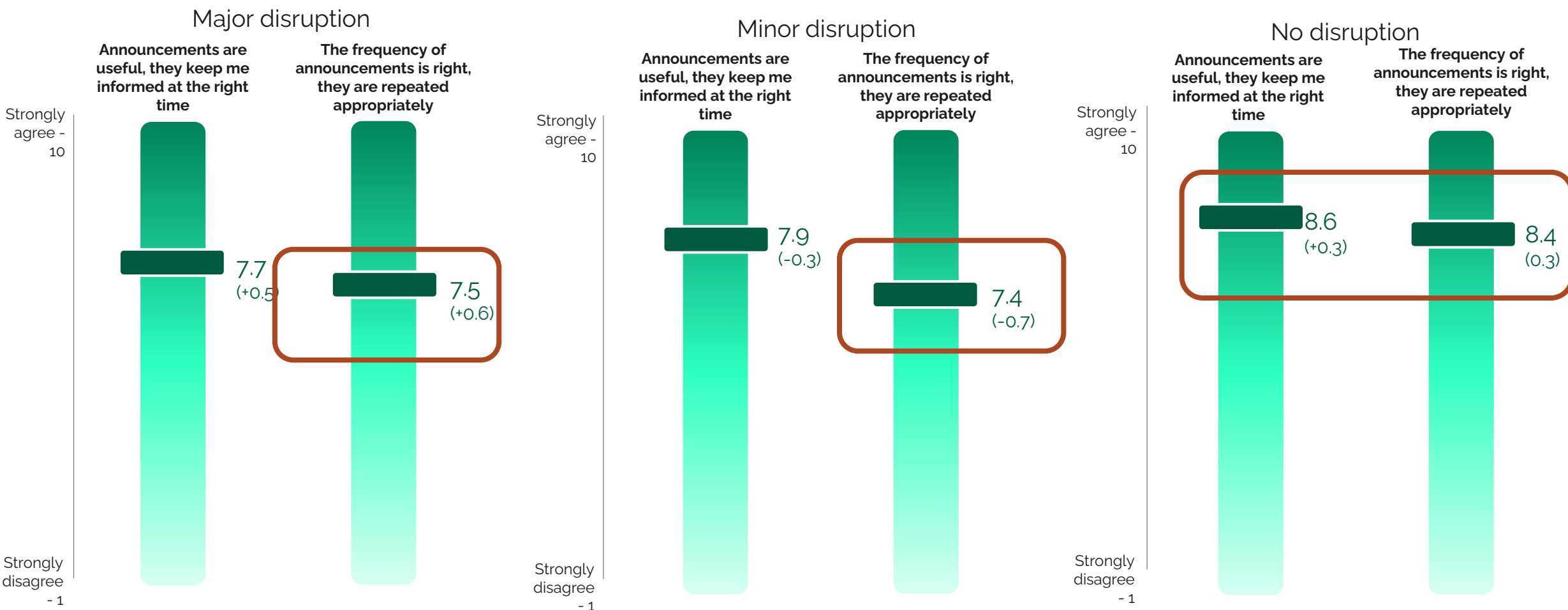
Announcements at the station (%)



Satisfaction with and ratings of announcements at the station (3/3)

To echo the results on slide 42, the lower agreement on the aspects of the station announcements suggests it's crucial that during a disruption announcements are as useful and timely as possible to ensure passengers feel more satisfied.

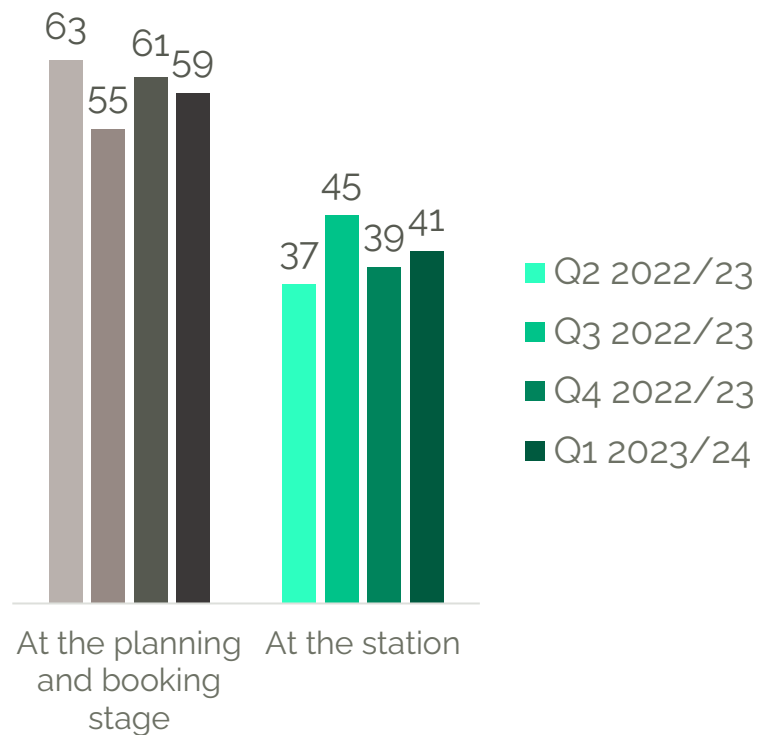
Announcements at the station (%)



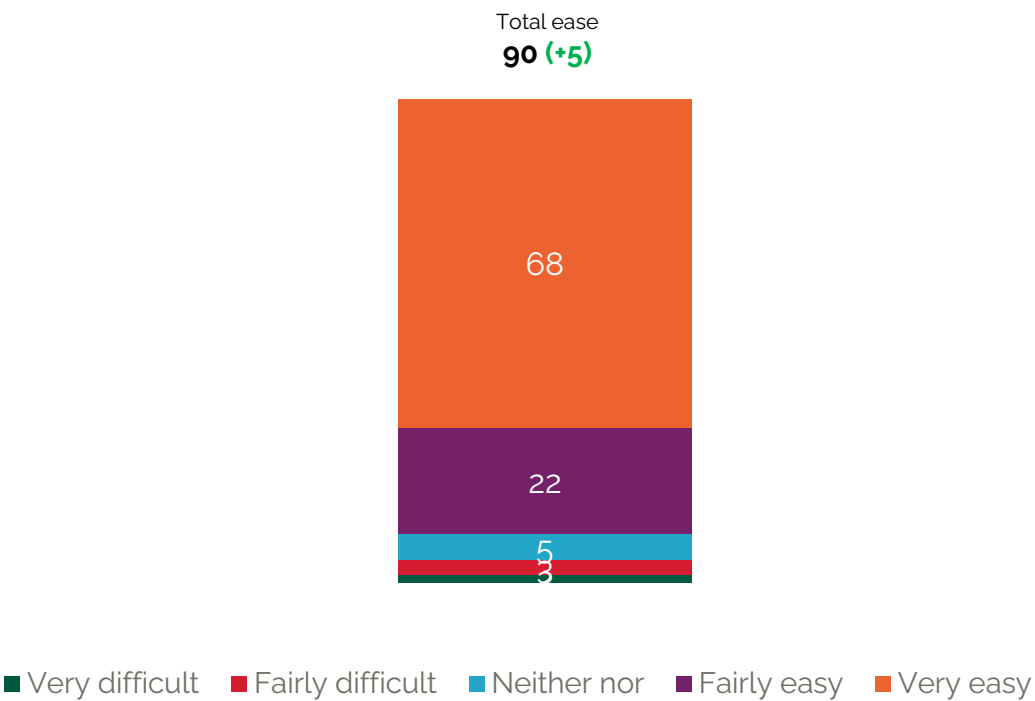
Stage informed about rail replacement bus and ease in finding such information

Fewer passengers were informed about the rail replacement bus at the station likely due to being informed earlier. Of those that were, nearly all felt at ease with finding their bus departure point from the information they received at this point.

Stage informed about the rail replacement bus (%)



Ease with finding bus departure point (%)





On board the train

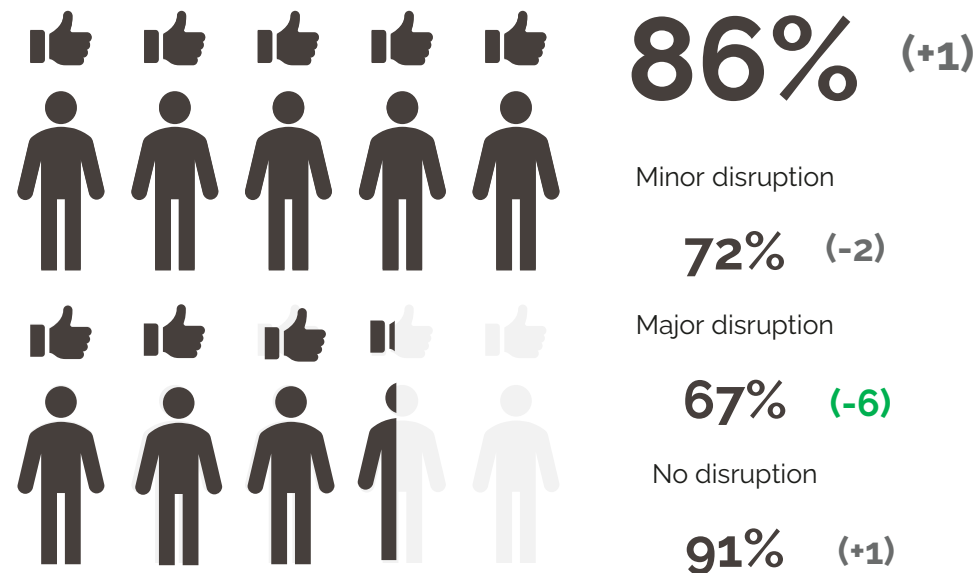
Rail Delivery Group



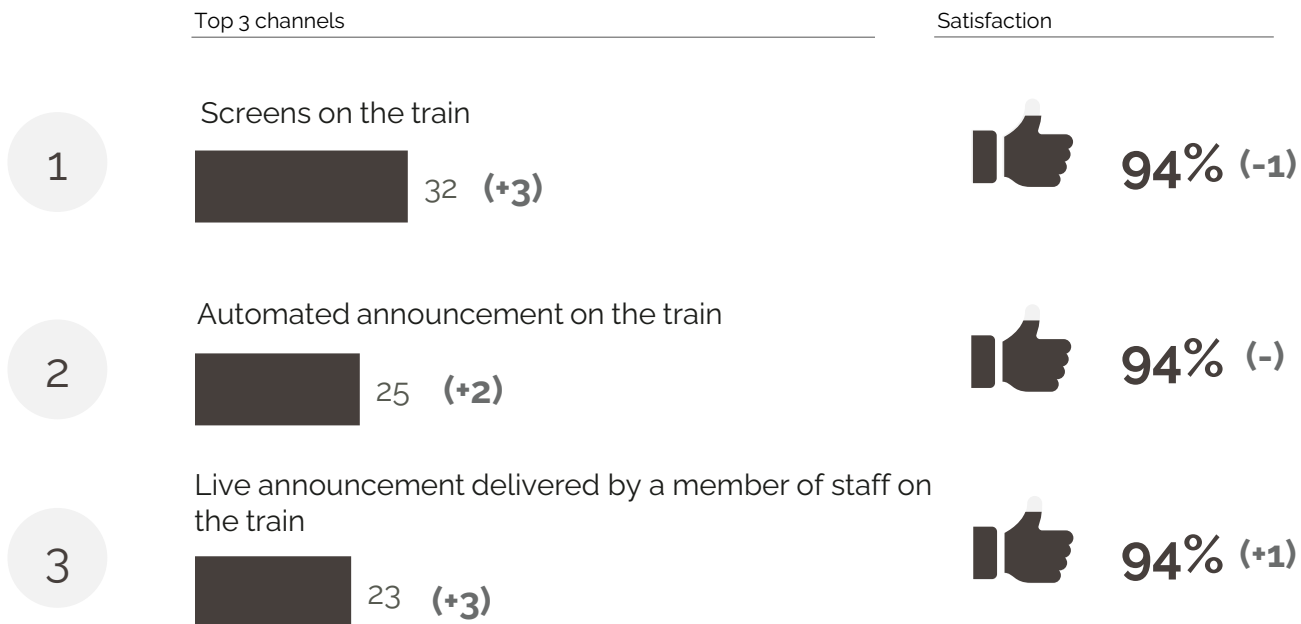
On board the train – Key satisfaction metrics

Overall, the satisfaction score given to information provided on the train was 86%. Similar to at the station, passengers rely on the screens as their main source of information (32%), this is followed by automated announcements (25%) and live announcements (23%). All of these share the same high satisfaction rating of 94%.

Overall, this quarter, passengers gave a satisfaction (with information provided) percentage of:



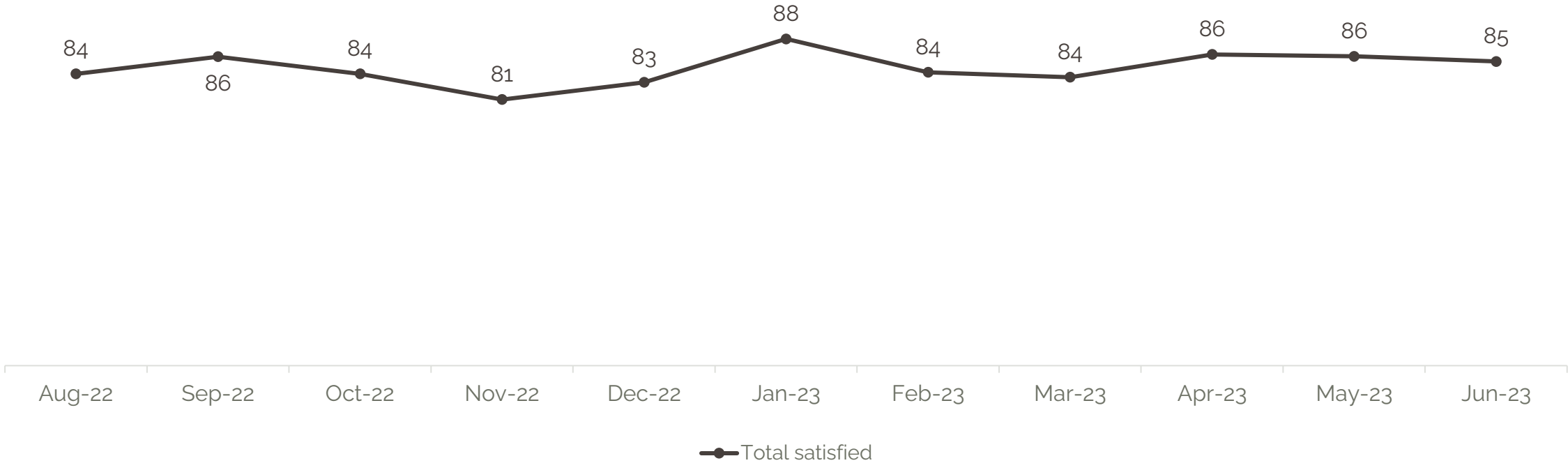
Top 3 channels used and their satisfaction (%):



Overall satisfaction with information provided when on board the train

Since March, satisfaction with information provision on board the train increased slightly and has been stable over the last 3 months.

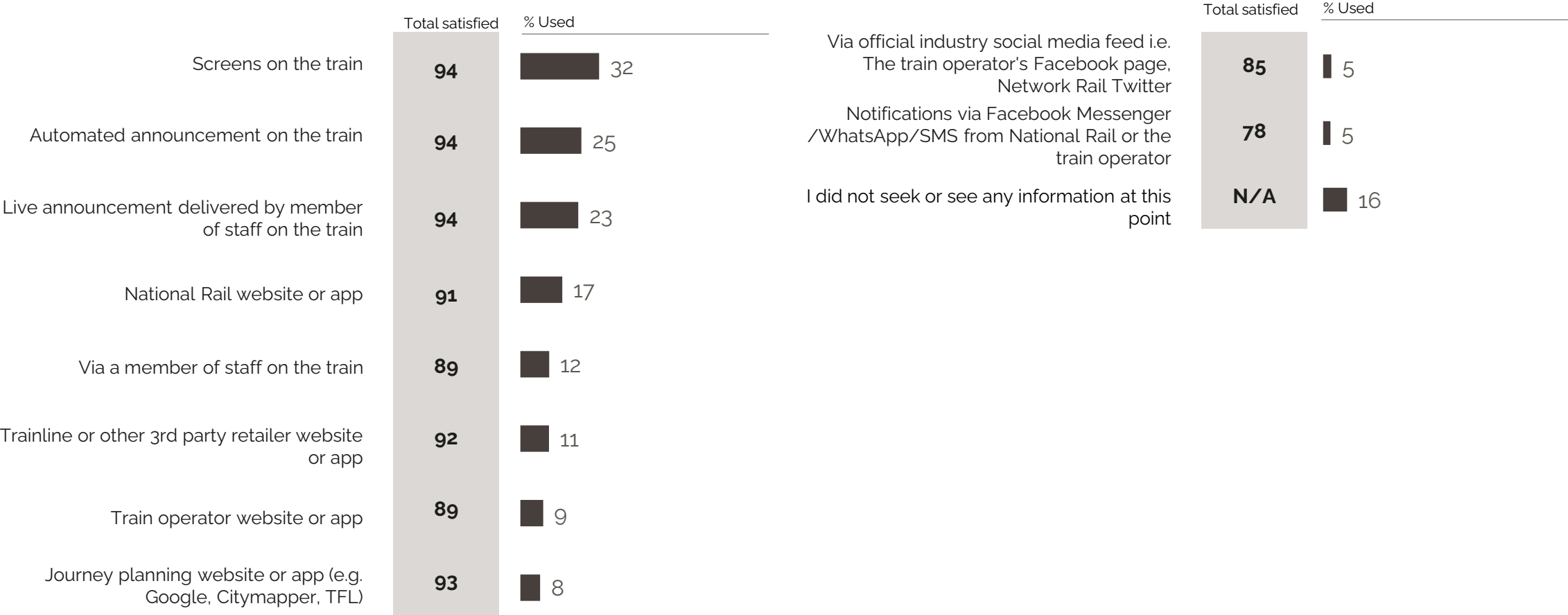
Overall satisfaction with information provided when on board the train – trended (%)



Information channels used and their satisfaction

Information channels used on board the train generally achieve a high satisfaction rating, particularly those with a higher usage.

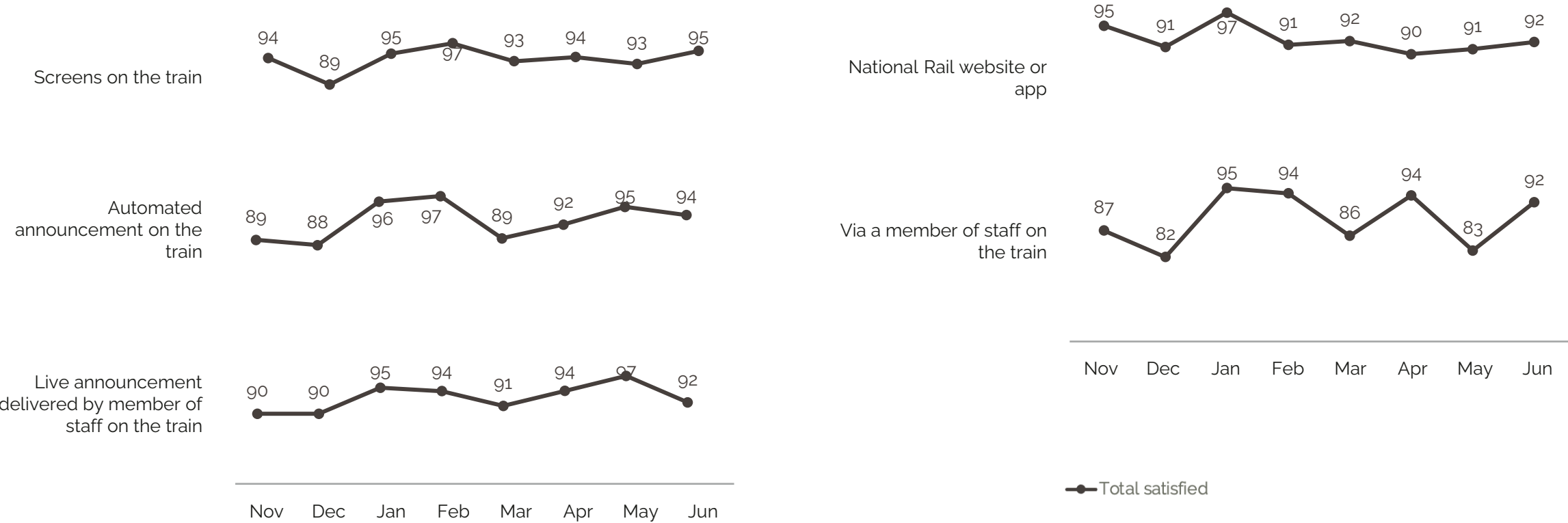
Information channels used and satisfaction with each when on board the train (%)



Satisfaction with information channels

As the most used channel, satisfaction with screens on the trains has remained consistently high and shows that this is a successful method of providing information for passengers. Information from a staff member on the train shows to be more changeable over the last few months.

Satisfaction of information channels when on board the train – trended (%)
(Top 5)

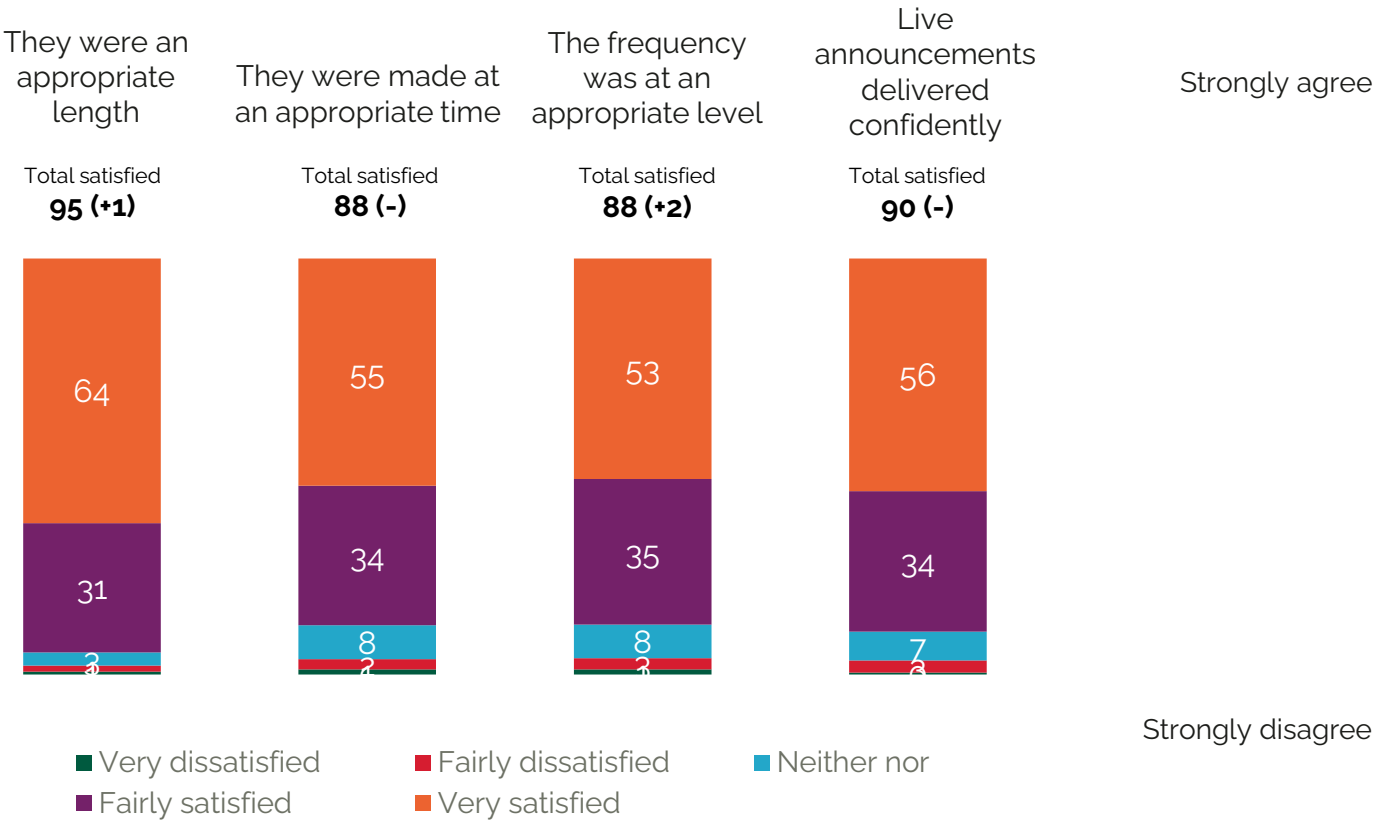


How satisfied were you with the information that was provided on the channels you used when on board the train? (excl DK) Nov/Dec 22/Jan/Feb/Mar 23 - Screens on the train (183/145/112/78/89/202/194/224), Live announcement delivered by member of staff on the train (119/115/119/99/133/144/139/174), Automated announcement on the train (124/110/127/115/163/162/134/193), National Rail website or app (86/89/112/78/89/103/107/122), Trainline or 3rd party website or app (64/69/57/60/46*/81/86/94) *Refers to low base size (under 50)

Satisfaction and ratings of announcements on board the train (1/3)

At an overall level, satisfaction with announcements on board was consistently high, in line with the last quarter.

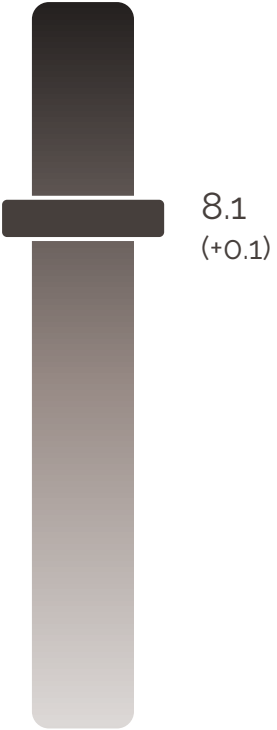
Announcements on board the train (%)



Announcements are useful, they keep me informed at the right time



The frequency of announcements is right, they are repeated appropriately



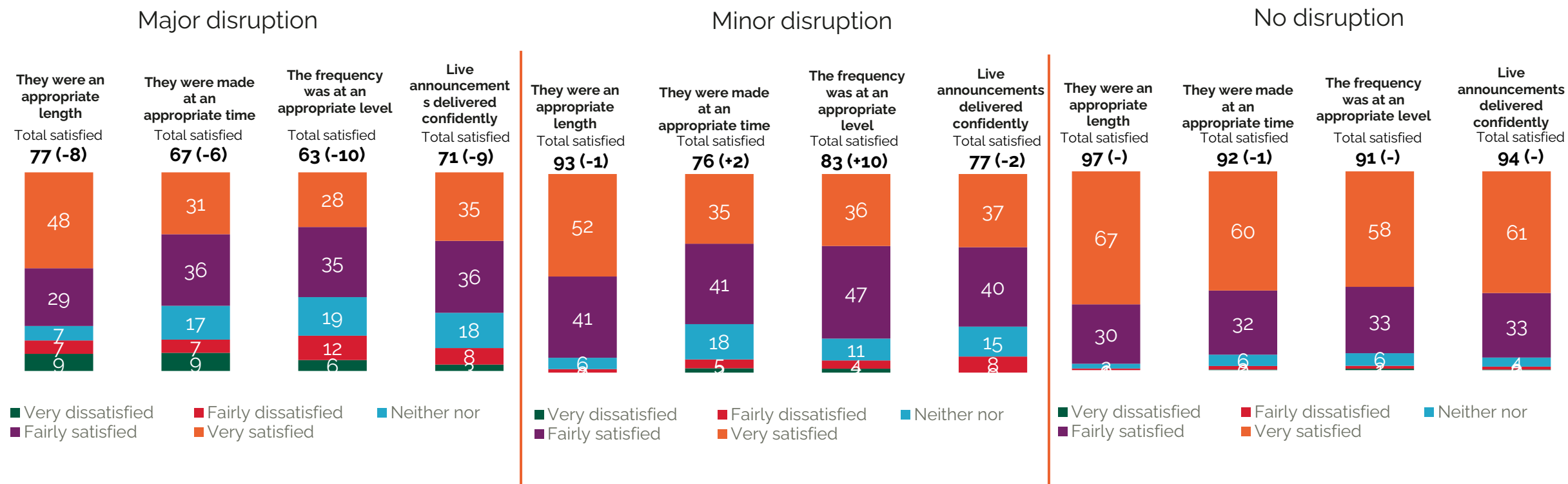
Strongly agree

Strongly disagree

Satisfaction and ratings of announcements on board the train (2/3)

Unlike at the station where the minor disrupted were less satisfied with announcements, the opposite is true for on board where there have been major improvements, particularly on frequency of announcements. On the other hand, the experience of the major disrupted has been less positive. Frequent announcements are crucial for improving journeys for the disrupted so it's important this is more apparent during delays and disruptions.

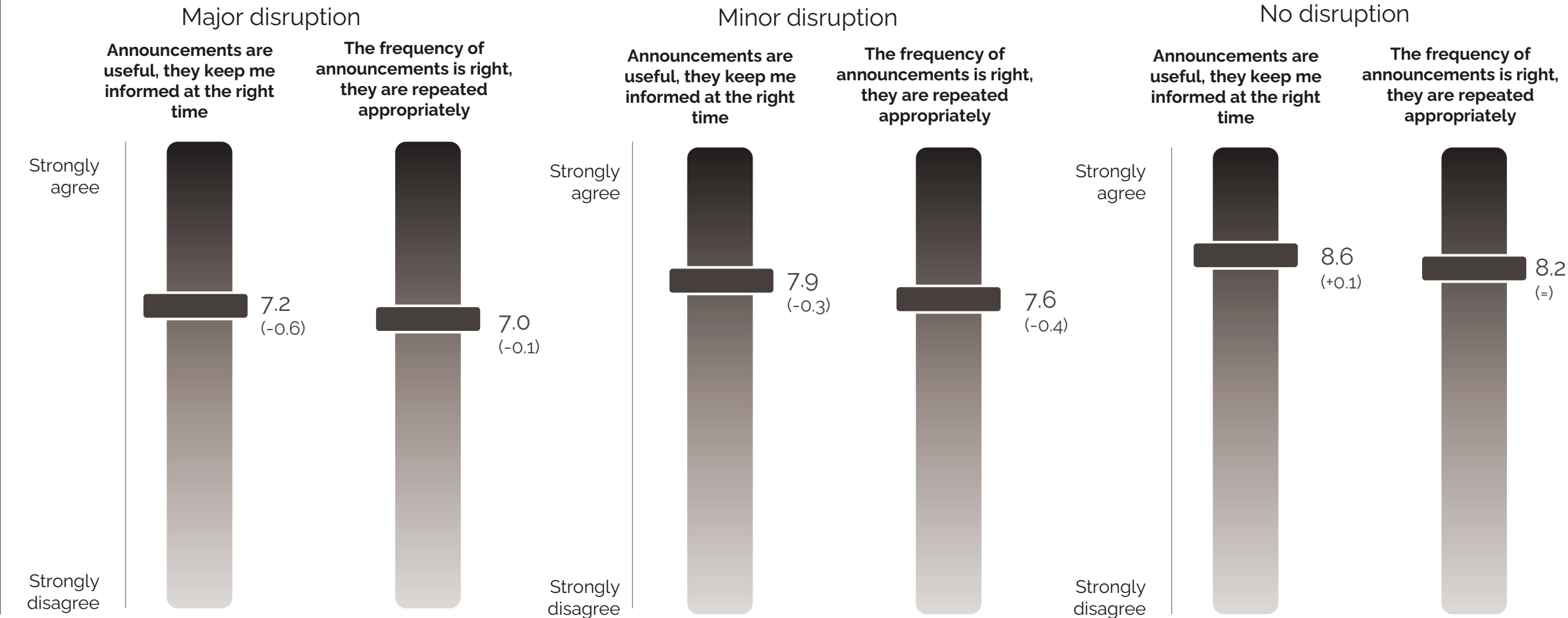
Announcements on board the train (%)



Satisfaction and ratings of announcements on board the train (3/3)

The non-disrupted are in agreement on the usefulness and frequency of announcements. There is some way to go to reassure the major disrupted, perhaps by making these more frequent for their particular situation.

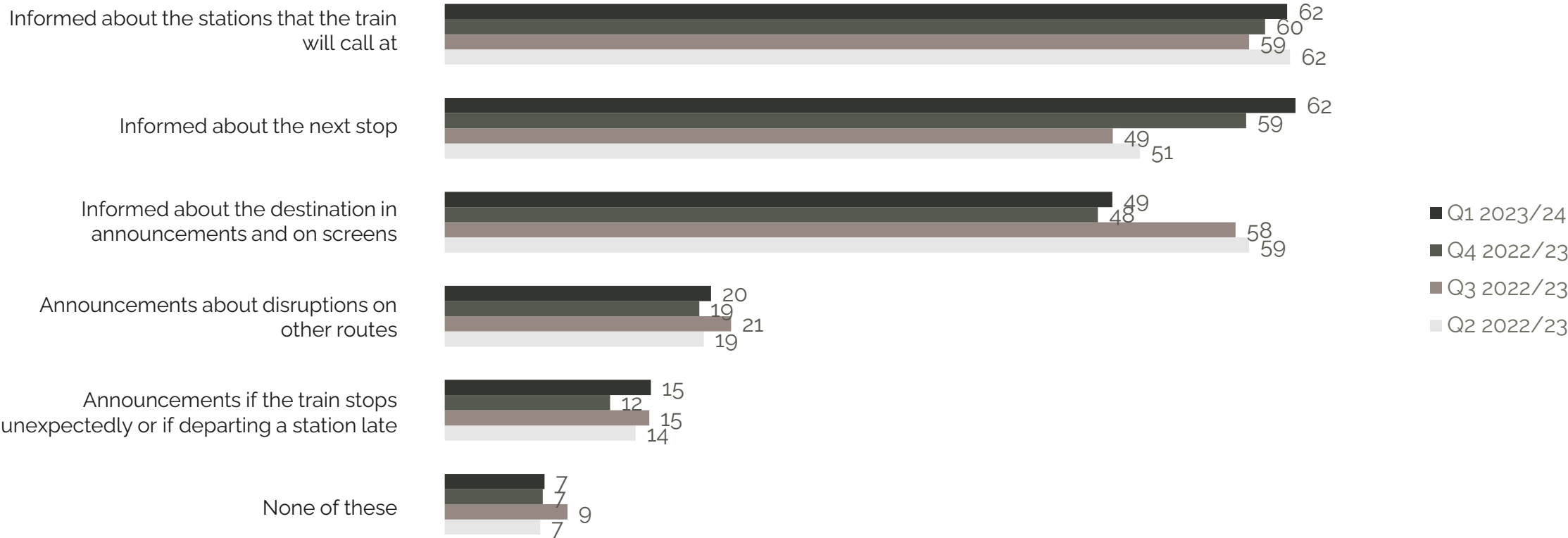
Announcements on board the train (%)



Type of information provided on board the train

Train calling points and next stops are the main pieces of information provided on board the train. Similar to last quarter, fewer are informed about the destination in announcements or on screens.

Information provided when on board the train (%)





At destination/ interchange

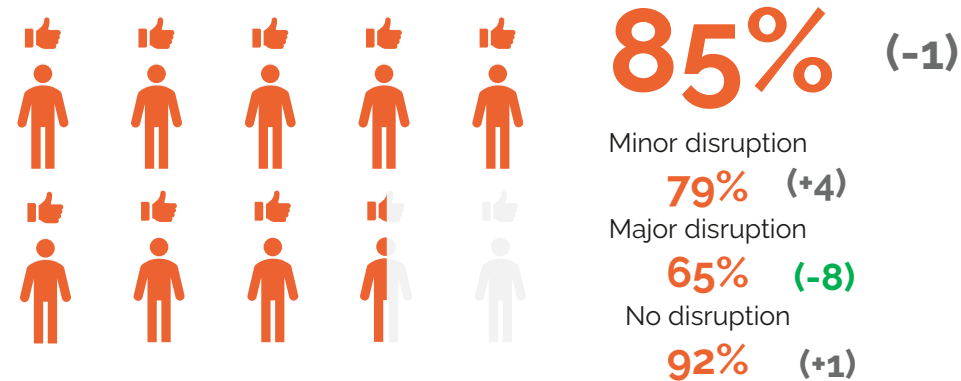
Rail Delivery Group



At destination/interchange station – Key satisfaction metrics

At the destination/interchange station, 85% of passengers are satisfied with the information received. The information channel used most at this stage is the station signage, posters and wayfinding, followed by the National Rail website/app and live announcements delivered by a member of staff, both with the same level of usage. Passengers are very positive about these channels for receiving information.

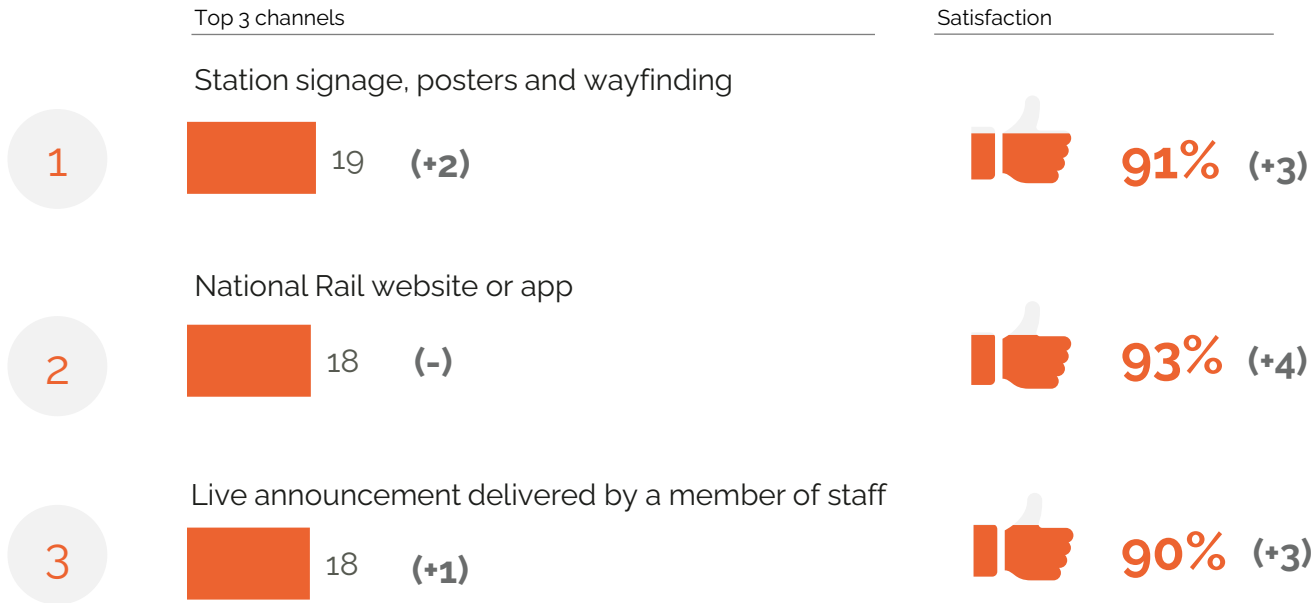
Overall, this quarter, passengers gave a satisfaction (with information provided) percentage of:



Information provided following the rail journey (%)



Top 3 channels used and their satisfaction (%):

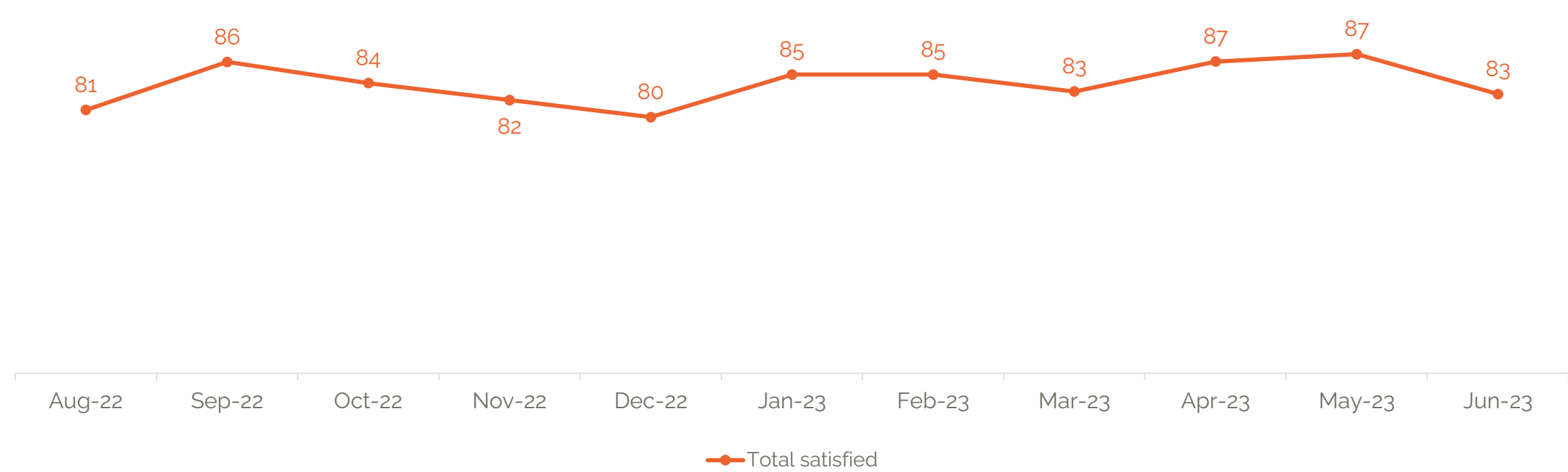


Overall, how satisfied were you with the information provided about your rail journey when at the intermediary and/or destination station? Apr-Jun 23 (2351) Which of the following information channels did you utilise when at the intermediary or destination station? How satisfied were you with the information that was provided on the channels you used when at the intermediary and destination station? (excl DK) Apr-Jun 23 (2517) Following your rail journey, were you provided with any of the following information...? Apr-Jun 23 (2363)

Overall satisfaction with information provided when at destination/interchange station

Satisfaction in information provision reaches its highest point in April and May 2023 since tracking began last August 2022. This dips again in June 2023, to levels experienced in March.

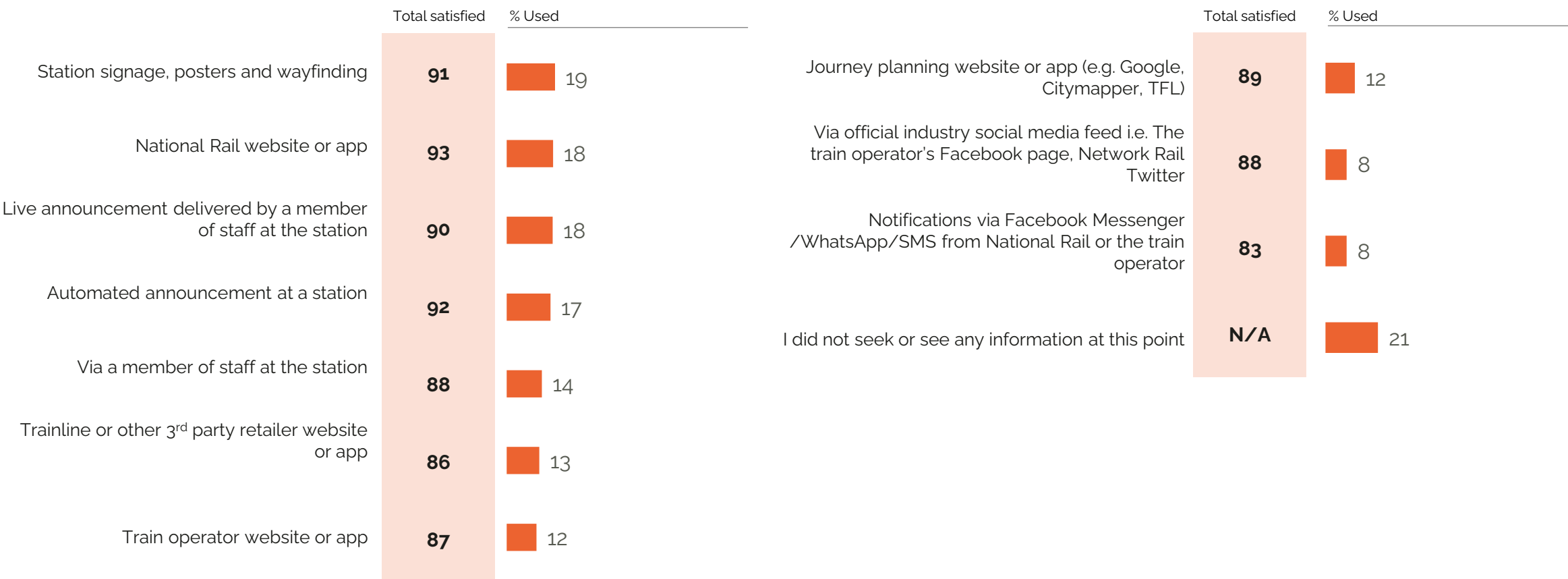
Overall satisfaction with information provided when at destination/interchange station – trended (%)



Information channels used and their satisfaction

A diverse set of information channels were used at the destination/interchange station with high levels of satisfaction provided for the majority.

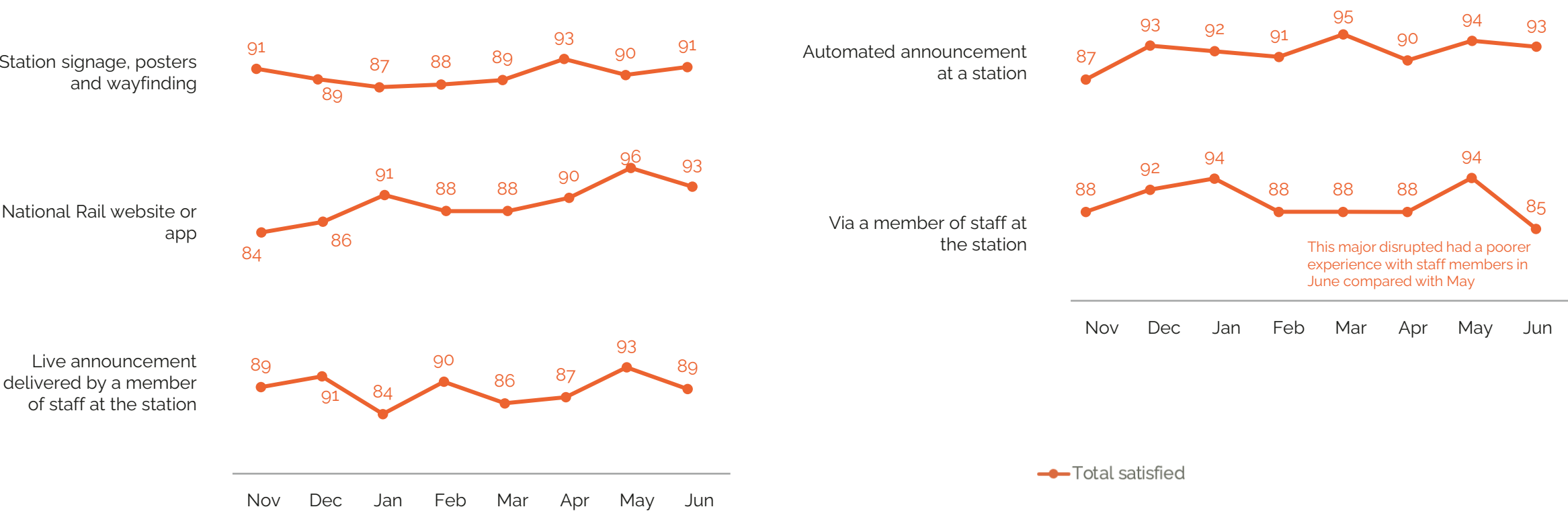
Information channels used and satisfaction with each when at destination/interchange station (%)



Satisfaction with information channels

The NR website or app has recorded the biggest improvements since the beginning of the year as a means for finding information on arrival. On the other hand, acquiring information via a member of staff performed well in May but dropped significantly in June after the major disrupted passengers had a poorer experience.

Satisfaction of information channels when at destination/interchange station – trended (%)
(Top 5)



How satisfied were you with the information that was provided on the channels you used when at the intermediary and destination station? (excl DK) Aug/Sep/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – National Rail website or app (143/170/138/130/147/121/149/163), Automated announcement (118/127/128/118/152/117/141/150), Station signage, posters and wayfinding (113/117/130/110/144/135/133/164), Live announcement (128/113/112/121/120/105/133/.160), Via a member of staff at the station (97/99/92/98/100/91/89/130)



After journey

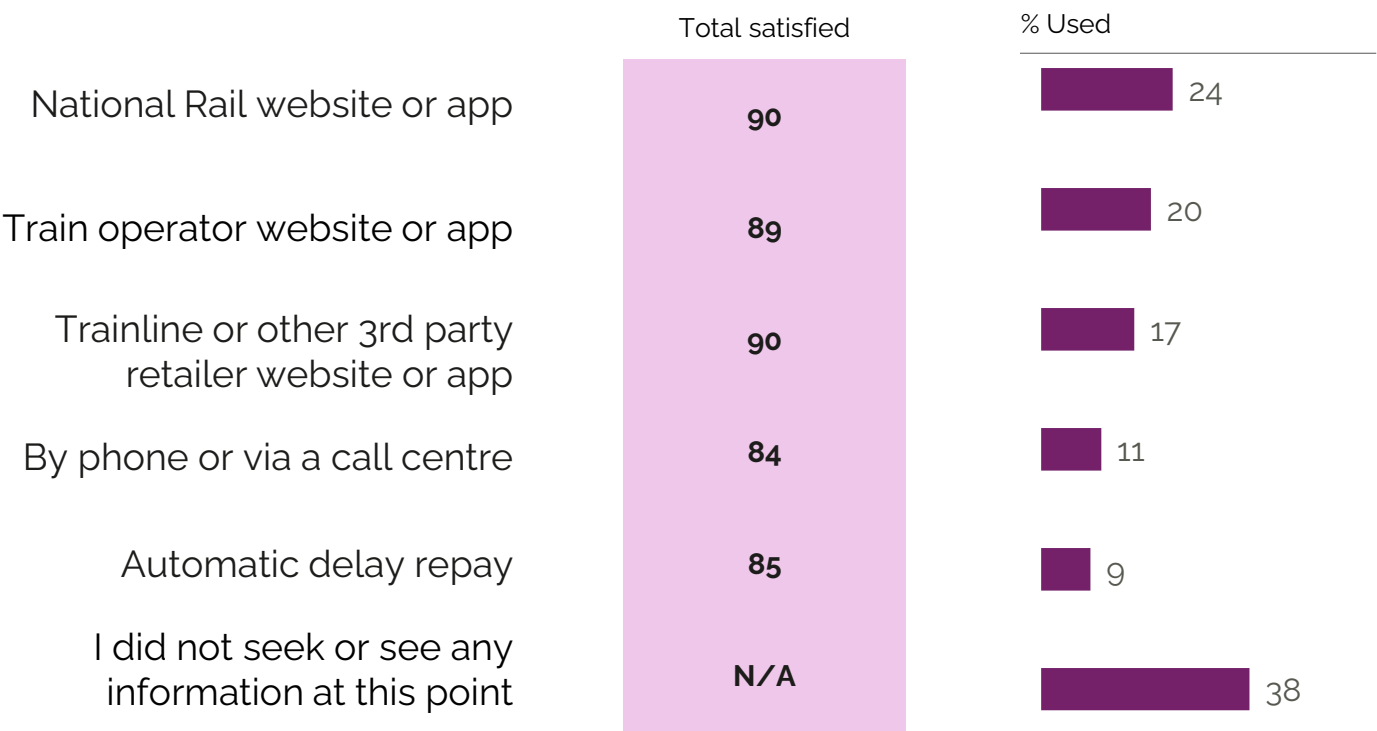
Rail Delivery Group



Information channels used and their satisfaction

After concluding their train journey, 38% of passengers do not actively seek or encounter information regarding their trip. However, among those who do seek such information, the National Rail website or app is the primary source, followed by the train operator or Trainline or other third party website or app. It's worth noting that satisfaction levels are consistently high across all channels for obtaining post-journey information.

Information channels used and satisfaction with each after the journey (%)

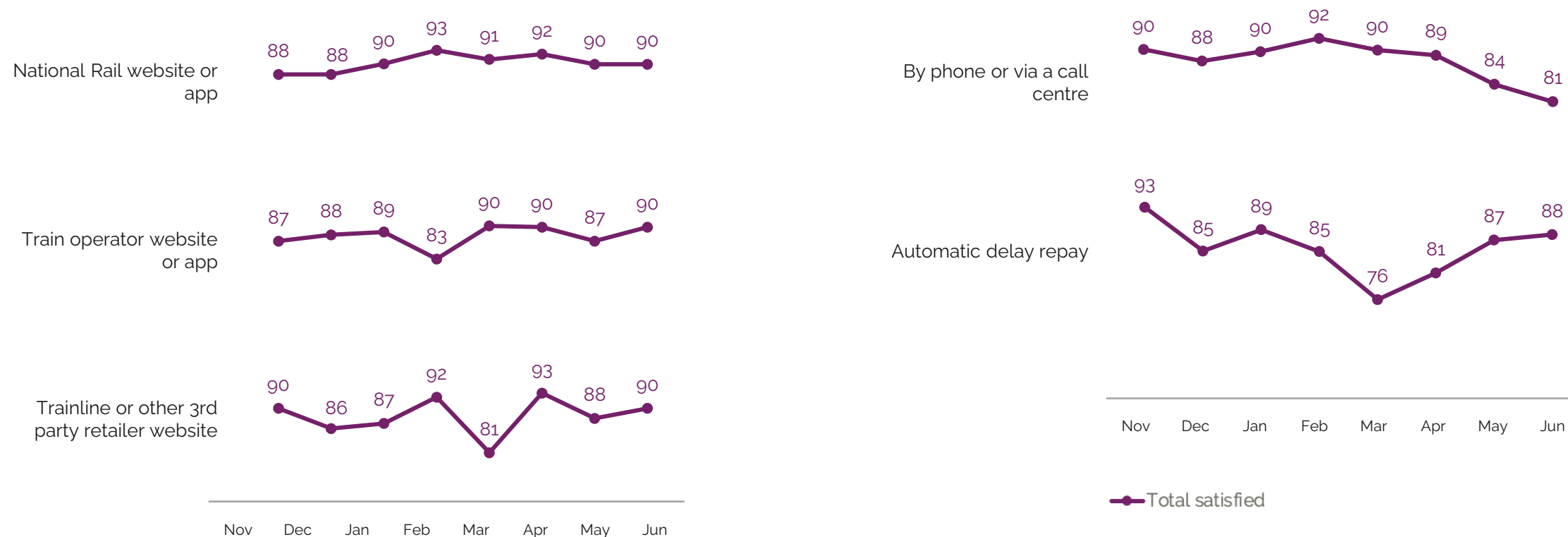


At this stage, **disrupted passengers** are more likely to seek information after the journey. While 48% of **non-disrupted passengers** do not seek information at this point.

Satisfaction with information channels

Looking at the trended data for information channels after the journey, National Rail website and the train operator website or app remain stable in their satisfaction scores. By phone or via a call centre has shown a decline since February and as a mode used more so by the disrupted than non-disrupted; it's important that this channel is able to provide a service that can respond effectively and carefully to situations when people have been disrupted.

Satisfaction of information channels after the journey – trended (%)
(Top 5)



How satisfied were you with the information that was provided on the channels you used after you had completed the journey? (excl DK) Jan/Feb/Mar/Apr/May/Jun 23 - National Rail website or app (207/176/193/183/192/241), Train operator website or app (175/143/143/155/172/202), Trainline or 3rd party retailer website (156/146/137/145/162/178), By phone or via a call centre (98/70/80/91/86/120), Automatic delay repay (78/75/74/73/77/88).



Experience with disruptions

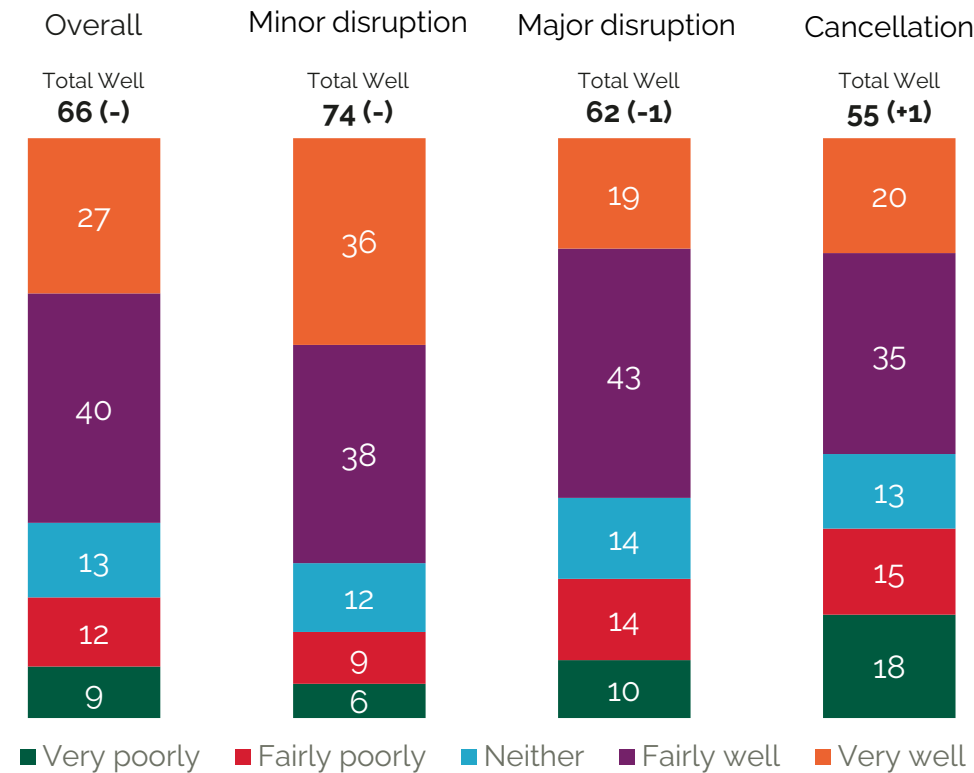
Rail Delivery Group



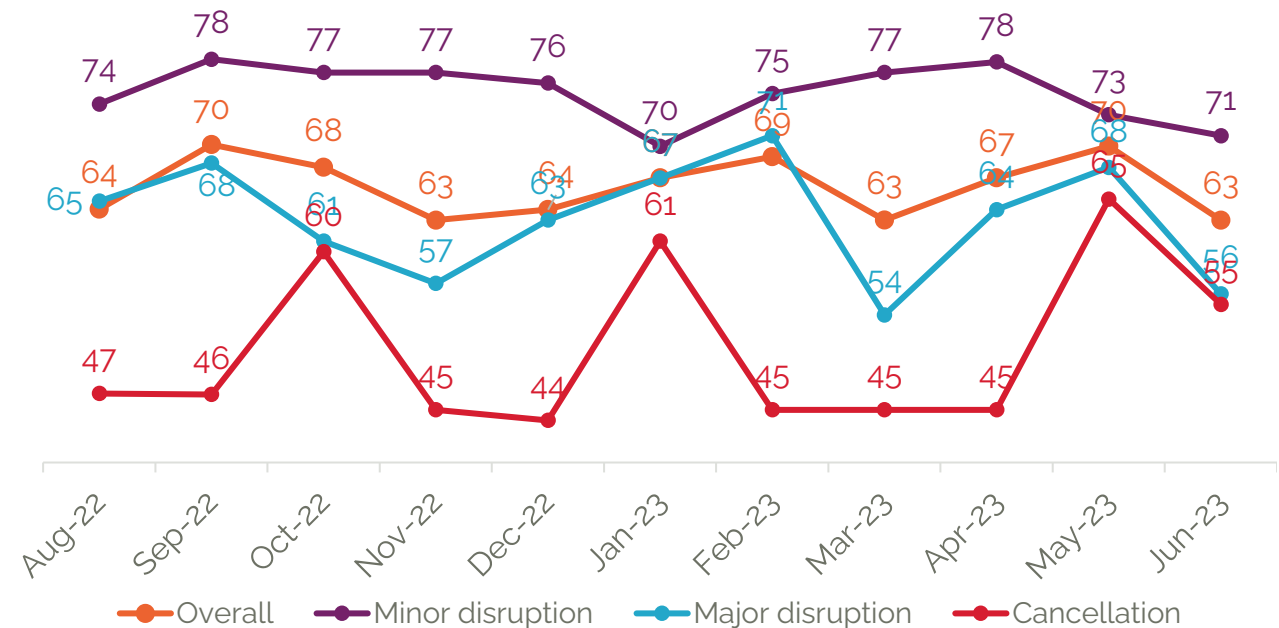
Overall rating of information provided about the delay (1/2)

Comparable to last quarter, two thirds of customers rated that the TOC had kept them fairly or well informed about the delay. From May to June there was an observed decline in the rating of how well information was provided about the delay among the major disrupted and cancelled, which mirrors trends seen at various stages in the journey where channels most used by this group did not perform as well.

Overall rating with information provided about delay by disruption (%)



Total Well Trend

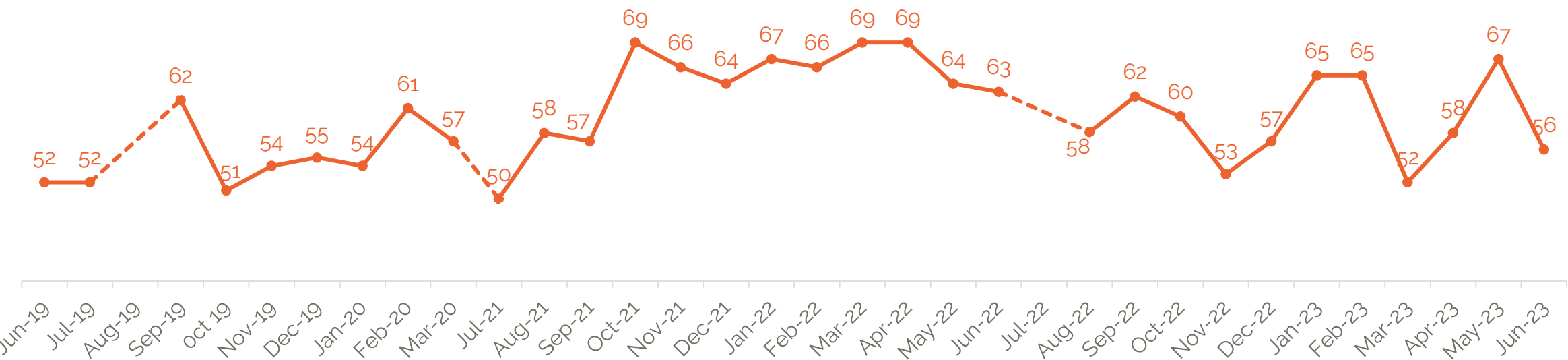


Overall rating of information provided about the delay (2/2)

When comparing to historic PiDD data and the third quarter of the Infotracker data, after the steep decline in March, this group of passengers showed significant improvements until June, where levels returned to those last experienced in late 2022.

Overall rating with information provided about delay including PiDD historic data – focusing only on cancelled and major disruption (%)

Total Well Trend

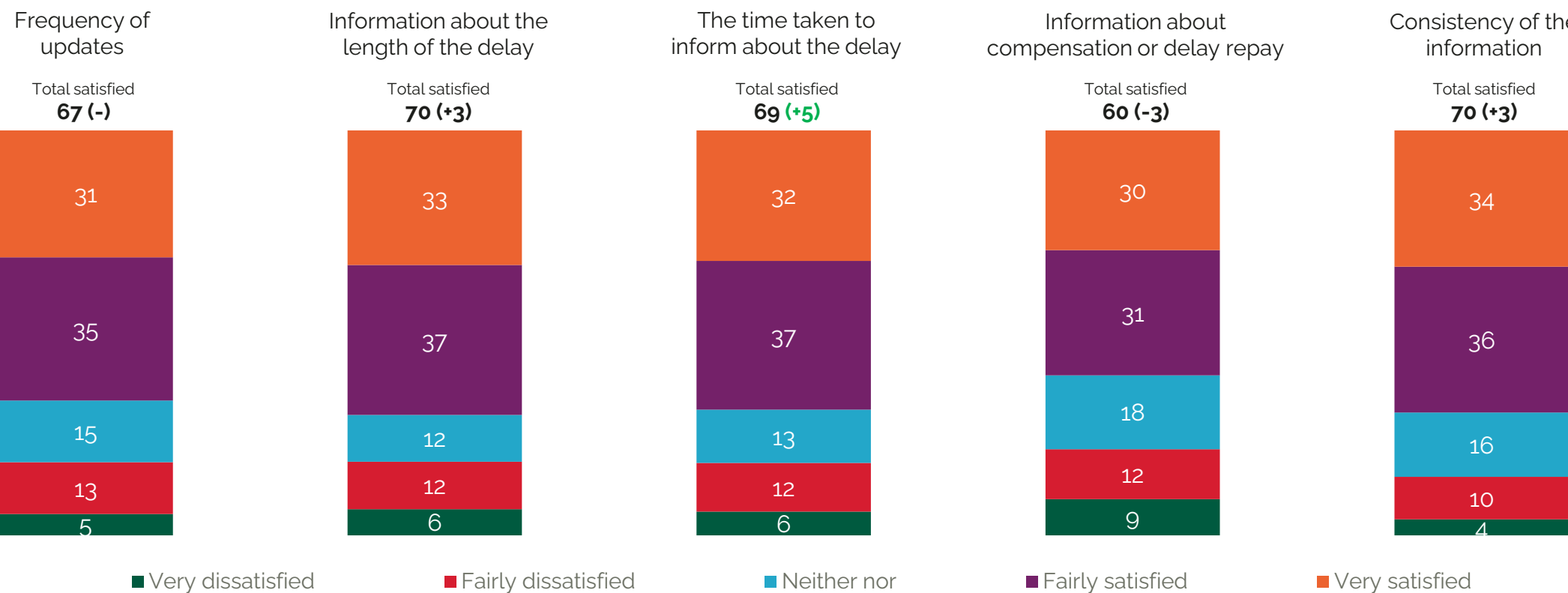


Overall, how well do you think the train company kept you informed about the delay or cancellation? Aug/Sept/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – Overall (701/364/210/199/265/363/297/365/289/299/389). Disruption: Dotted lines refer to data where responses were not possible due to no panel data for this period of time or pause in fieldwork during the pandemic

Overall satisfaction with aspects of information provided during the delay (1/4)

At an overall level, satisfaction with the majority of aspects of the delay information are stable or improving. The information about compensations or delay repay was an area where passengers were slightly less satisfied (60%).

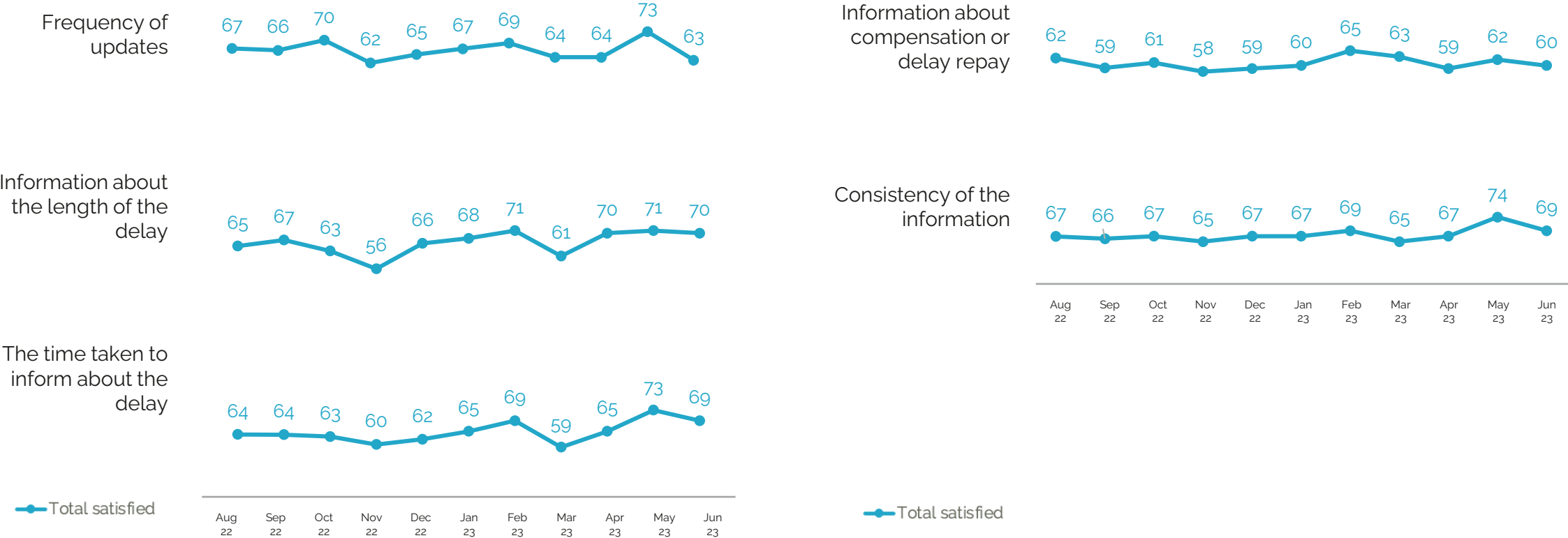
Overall satisfaction with aspects of information provided during the delay (%)



Overall satisfaction with aspects of information provided during the delay (2/4)

The satisfaction with aspects of information provided during a delay rose again in April and May. All experienced a decline in satisfaction in June. Frequency of updates, consistency of information and time taken to inform about the delay decreased significantly in satisfaction.

Overall satisfaction with aspects of information provided during the delay – trended (%)

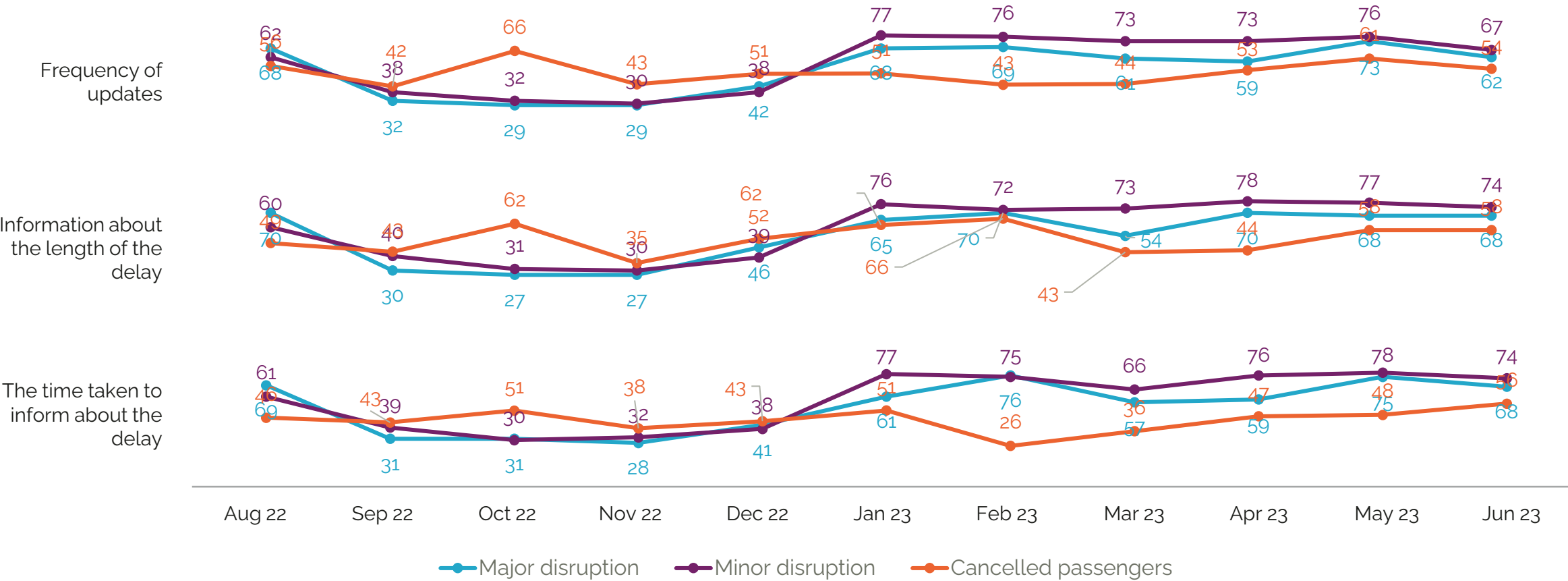


How satisfied were you with the following aspects of the information provided in relation to the delay or cancellation you experienced during your journey? (excl DK) Aug/Sep/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – Frequency of updates (701/361/345/340/433/359/301/364/291/299/389), Length of delay (696/359/350/342/430/362/299/364/289/295/389), Time taken (697/366/350/342/431/360/299/364/287/300/388), Compensation (679/352/344/329/414/347/295/349/281/291/380), consistency (698/364/350/341/431/360/300/363/287/297/387)

Overall satisfaction with aspects of information provided during the delay (3/4)

The satisfaction with aspects of information provided during a delay were fairly stable for most of the quarter, for both those with major and minor disruption. All types of disruption impacted the decline in frequency of updates in June, while those experiencing cancellations drove the decline in satisfaction for the information about compensation or delay repay.

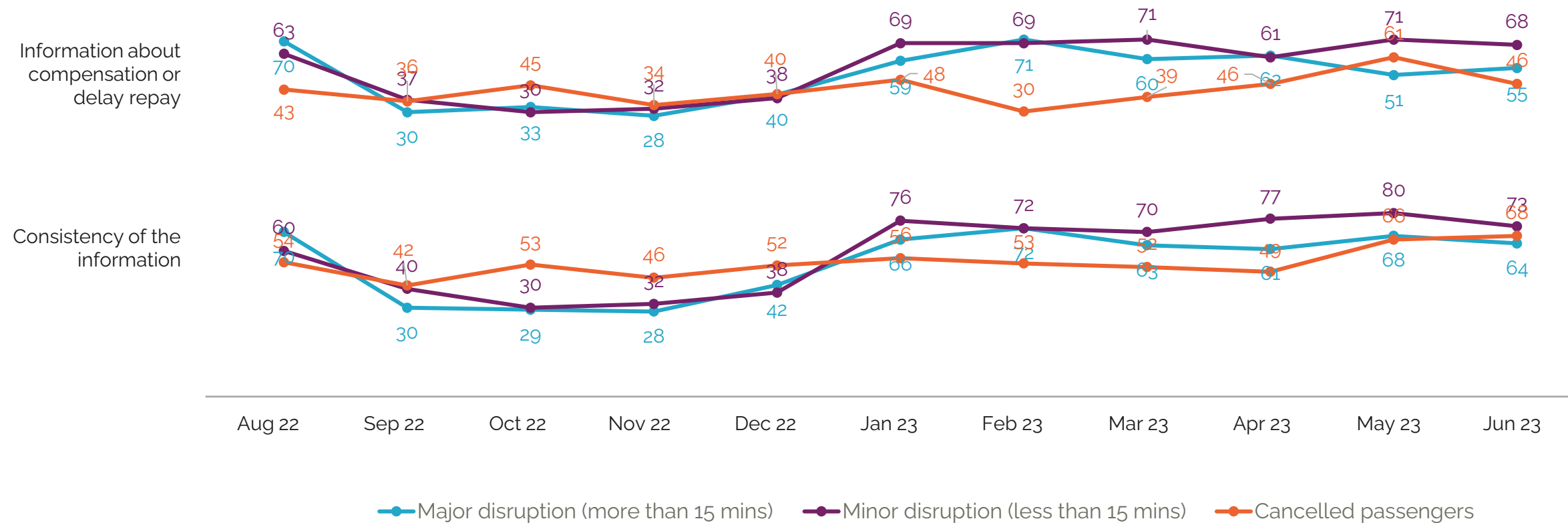
Overall satisfaction with aspects of information provided during the delay – trended (%)



How satisfied were you with the following aspects of the information provided in relation to the delay or cancellation you experienced during your journey? (excl DK) Aug/Sep/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – Frequency of updates (701/361/345/340/433/359/301/364/979), Length of delay (696/359/350/342/430/362/299/364/973), Time taken (697/366/350/342/431/360/299/364/975)

Overall satisfaction with aspects of information provided during the delay (4/4)

Overall satisfaction with aspects of information provided during the delay – trended (%)

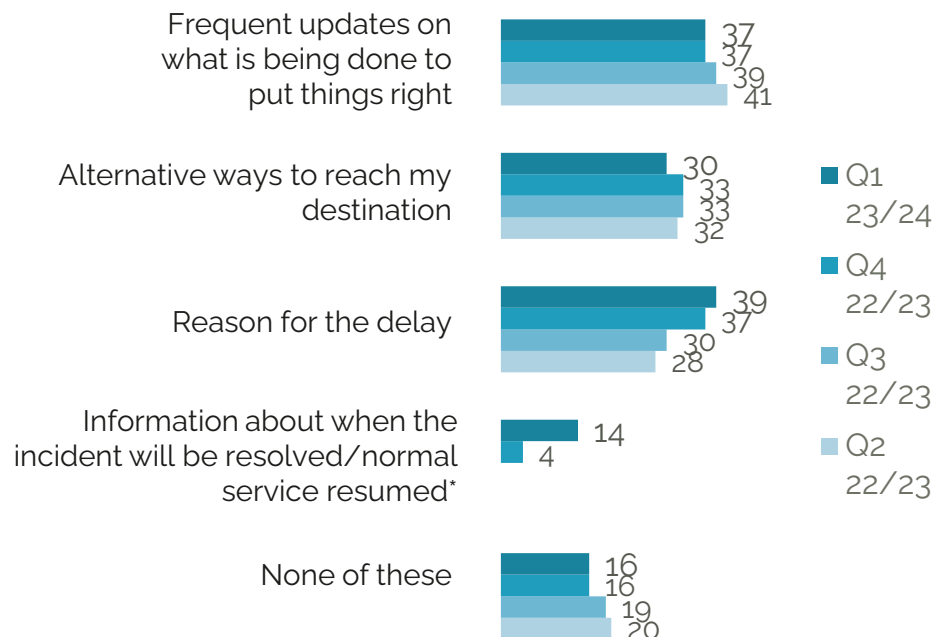


How satisfied were you with the following aspects of the information provided in relation to the delay or cancellation you experienced during your journey? (excl DK) Aug/Sep/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – Frequency of updates (701/361/345/340/433/359/301/364/979), Length of delay (696/359/350/342/430/362/299/364/973), Time taken (697/366/350/342/431/360/299/364/975), Compensation (679/352/344/329/414/347/295/349/952), consistency (698/364/350/341/431/360/300/363/971)

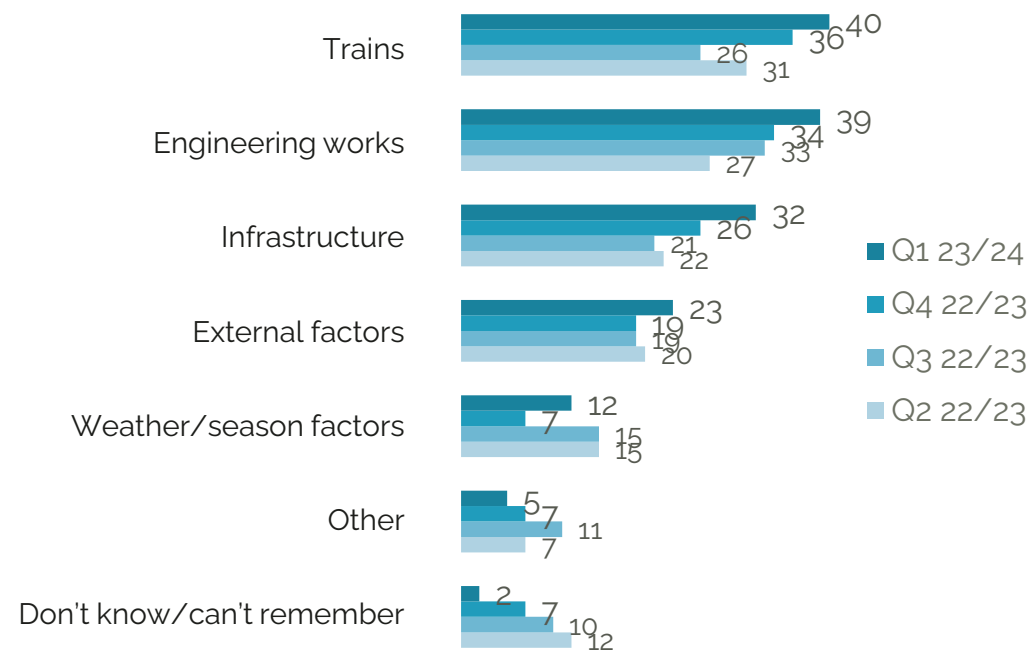
Provision of information during disruption and the reason given

Of the information provided to passengers, the reason for delay continues to be the main type of information provided to disrupted passengers. Trains were the main reason for disruptions, likely driven by continued strikes and other unplanned disruptions.

Type of information provision during the disruption (%)



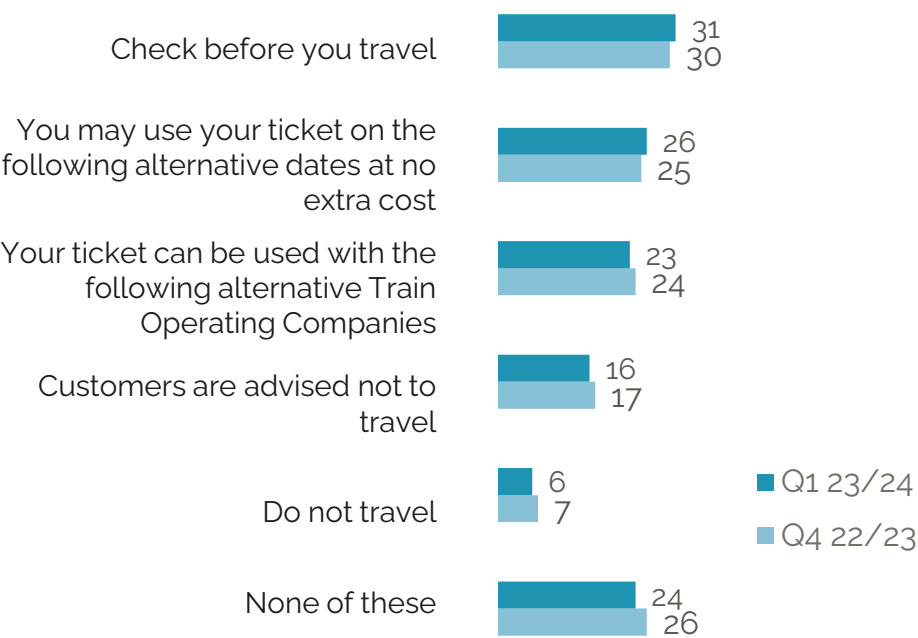
Reasons for the given disruption (%)



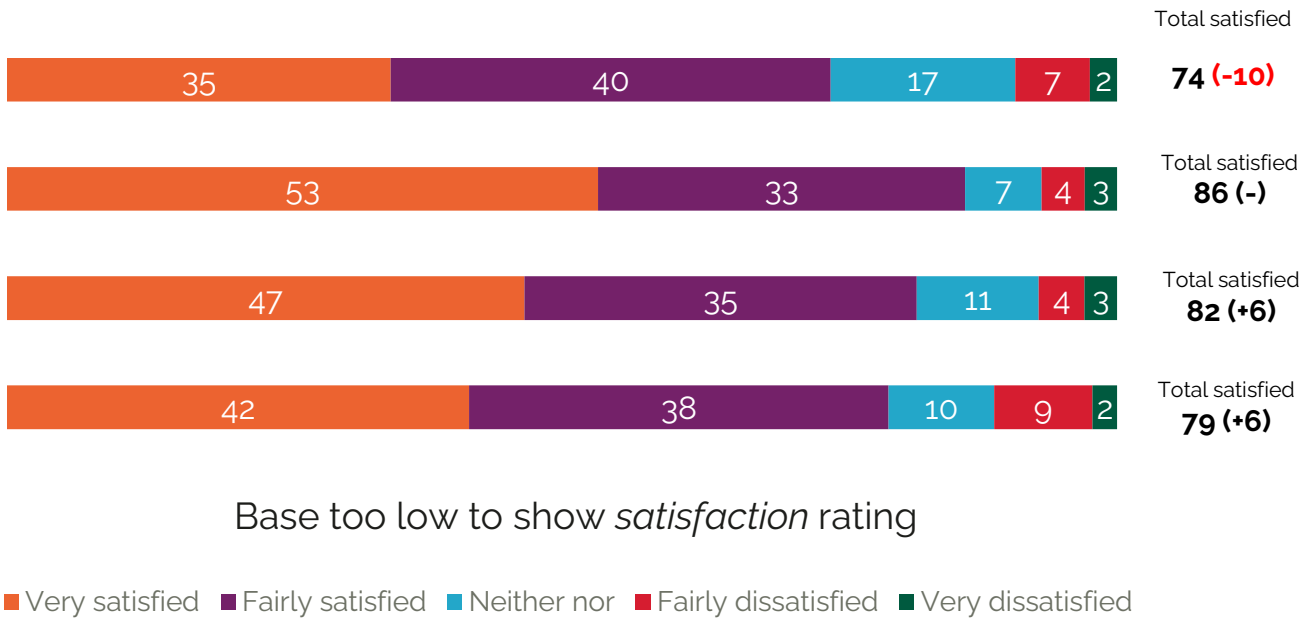
Messages recalled by those experiencing a major disruption

The most common message recalled by those experiencing a major disruption was “check before you travel”, of which just over 3 in 4 were satisfied with this message (albeit this has declined on last quarter). On the other hand, passengers were significantly more satisfied with advice on tickets or on not to travel – two statements that provide more certainty and clarity.

Messaging recalled seeing during journey (%)



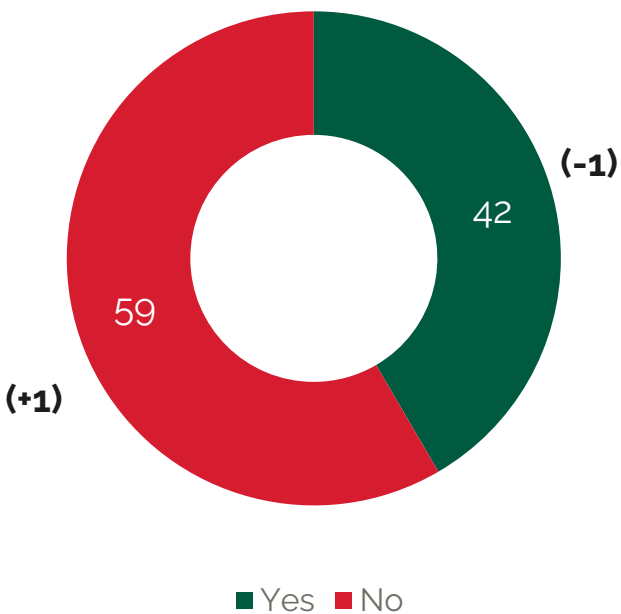
Satisfied with the following.... (%)



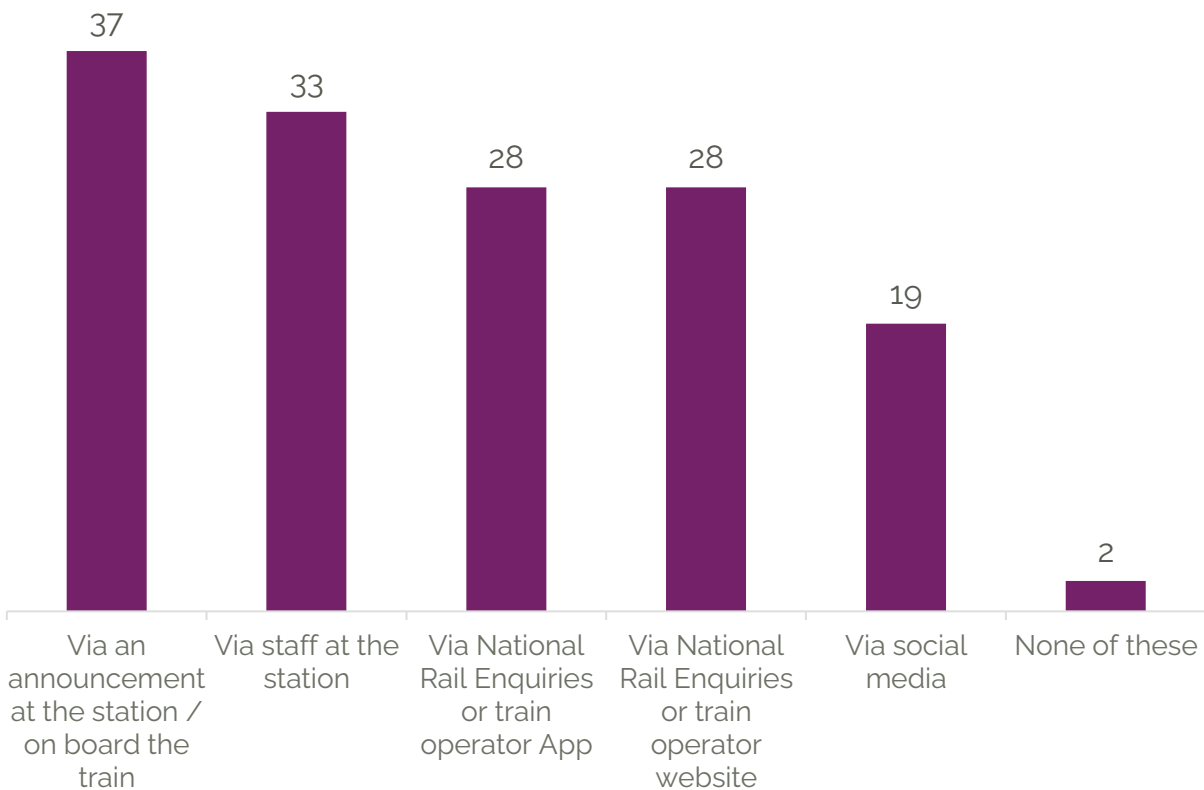
Alternative route information during a major disruption

2 in 5 passengers that were major disrupted received information on alternative routes, of which announcements at the station or on board the train were the main route for receiving this information, followed by staff at the station. Most passengers still remained unaware of alternative ways around a disruption suggesting more could be done via announcements to improve this provision of information, particularly as the disrupted are not as positive about announcements at the station or on board.

Did you receive information about alternative routes during a major disruption? (%)



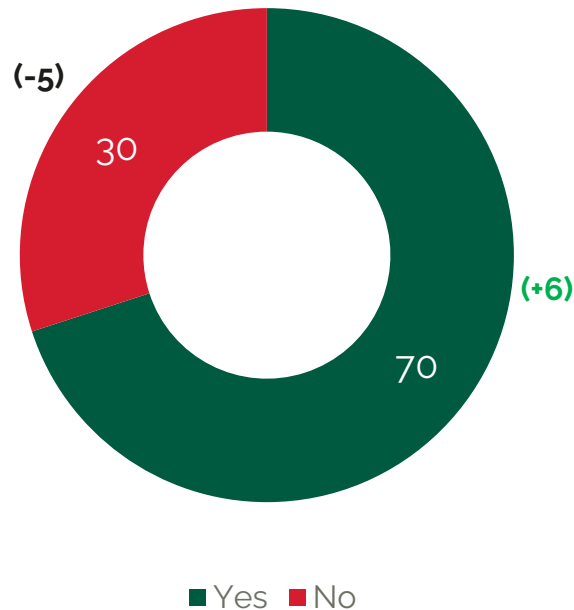
Which channels did they receive this information (%)



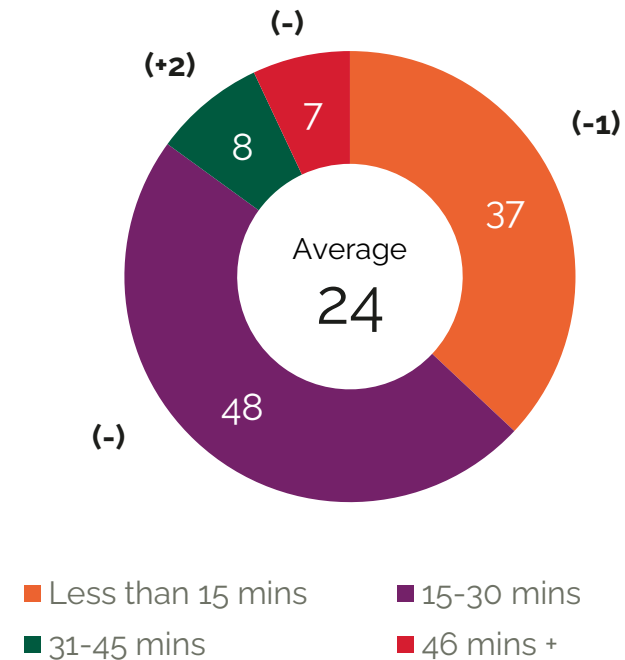
Delay length

Overall, 70% of disrupted passengers were given an estimate for the length of their delay, a significant improvement on last quarter. Two-thirds of customers' delay was more than 15 minutes with an average delay of 24 minutes, a time that has increased most among commuters.

Were you given an estimate for how long the delay will be going on for? (%)



How late was the arrival to the destination station? (%)

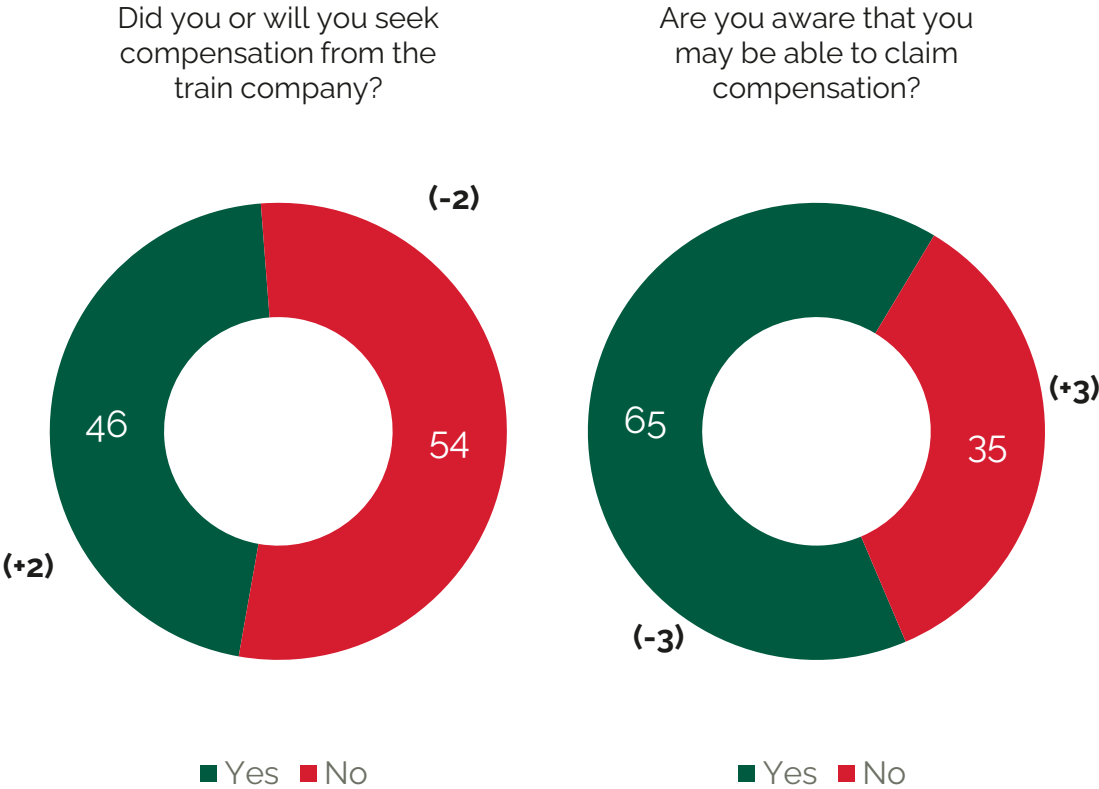


Avg. wait time	
Commuters	25 (+5)
Business	23 (-)
Leisure	24 (+2)

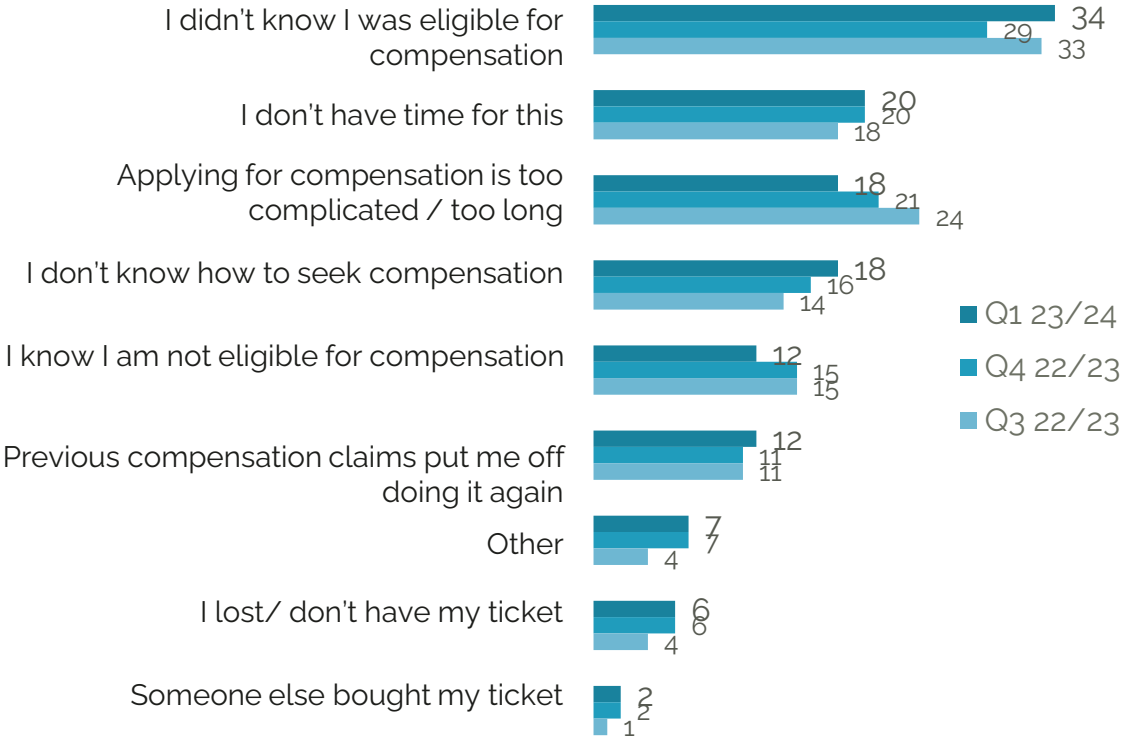
Compensation for delayed journeys

While the majority are aware they may be able to seek compensation regarding their disruption, only 46% suggest they will do so. This is driven by less awareness of their eligibility and the time and complexities involved.

Compensation (%)



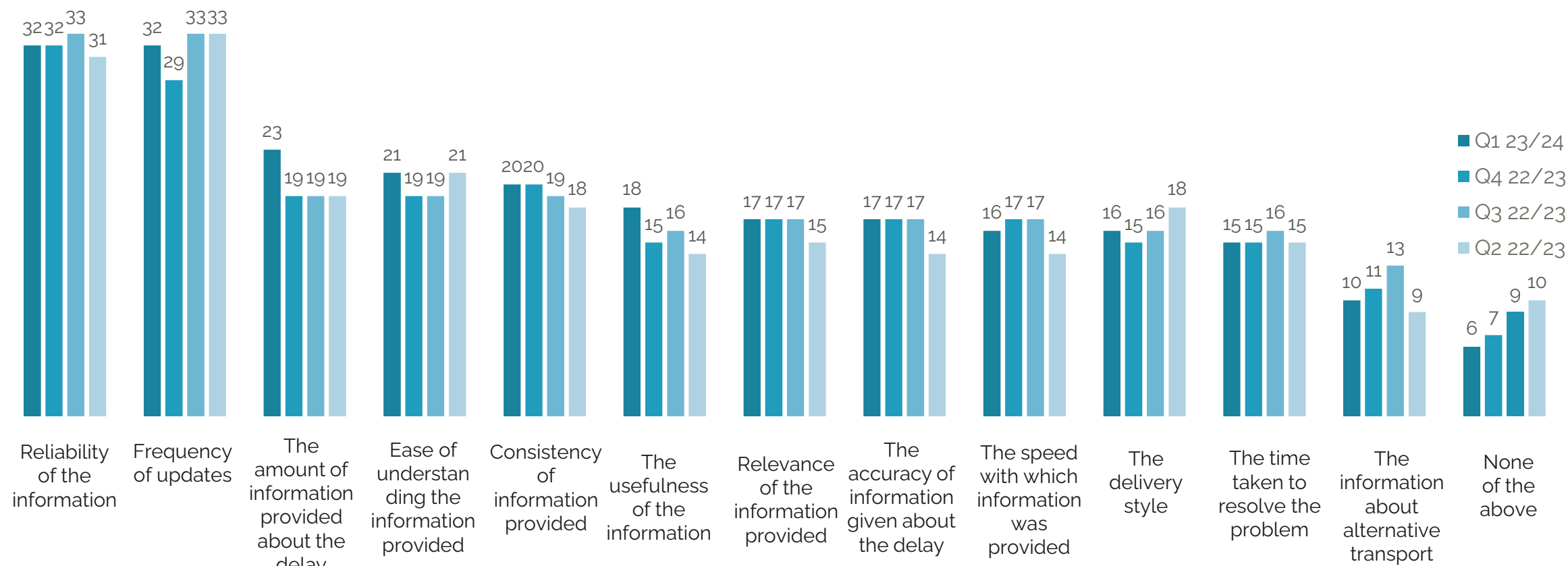
Reasons why they won't claim compensation (%)



Improvements desired for information on disruptions in the future

Disrupted passengers would like to see more reliable information and frequent updates – these are two areas that remain consistently high on being desired in future and are not always consistently maintained throughout the quarter.

Information improvement desired for future disruptions or cancellations (%)





Appendix

Rail Delivery Group



Best parts of information provision during the journey

Overall, passengers are positive regarding the information they received on apps, customer service from staff, notices and announcements received at the station and on board the train. People appreciate frequent updates and apologies where delays were experienced. Repetition also helps for those who may have missed the first announcement.

Best parts of information provision during your journey

“

The information was up to date and easily available to see on the boards at the station and through the announcements made on the tannoy
No disruption/Commuter

“

I used the Trainline app to tell me about the delay which worked well
Minor disruption/Leisure

“

It was fast and efficient and simple worded. This allowed me to understand quickly
Major disruption/Commuter

“

The guard apologised for the delay to the service and the severe overcrowding between Birmingham and Derby
Minor disruption/Business

“

The train employee was very informative and apologetic
Major disruption/Leisure

“

I needed platform details, and it was easy to obtain. I then checked departure boards to check all trains were running on time
No disruption/Leisure

“

It was very clear and easy to understand and follow
No disruption/Business

“

The ticket inspector on the departure train gave me an updated train time to connect at York as the original train booked was missed due to late running from Bridlington
Major disruption/Leisure

“

They were clear and got straight to the point. The information was also repeated to make sure everyone heard
Minor disruption/Commuter

Parts of information provision requiring improvement

Some passengers feel the information is shared too late meaning they cannot make alternative arrangements. Suggestions on improving this could be an app specifically for train delays/disruptions, where passengers can be quickly alerted to any issues. Passengers would also like clear information as to why their journey has been delayed and details of how to claim for compensation would be appreciated.

Improvements needed for information provision based on your journey

“

I think for national rail service to improve, before anyone gets on the train let them know if there's going to be a delay. For example, if someone has a really important meeting, they might miss it because of the delay. Just let them know before they get on the train

Minor disruption/Business

“

Maybe an app where you can track exactly where the train is would be useful

No disruption/Leisure

“

Try to announce it at a better time before the delay not one minute before

Minor disruption/Leisure

“

Inform customers before they travel of any disruption and announce ways that they can otherwise get to their destinations if possible

Major disruption/Commuter

“

The delay on the way back was caught up a bit but we were still late into Sheffield- no reason given for the delay

Minor disruption/Business

“

An online app that had all updates about delays would be really helpful

Major disruption/Commuter

“

Just the communication, I could not hear the person well

No disruption/Commuter

“

It would be good to have it explained as to why we had a delay and how to make a claim

Major disruption/Leisure

“

Have the voiceover say, "in approximately X minutes we'll be arriving at X". This will help people know when to start getting ready to leave the train

No disruption/Commuter

Information tailored to their needs

Of those who felt the information they were given was tailored to their needs, it was because it gave them exact details that were relevant to their journey, to which they could utilise to make further travel arrangements. In-person staff were also able to provide clear and concise details of alternative routes, which was appreciated.

How was information tailored to their needs?



It gave me clarity over departures and arrivals to I knew about connections etc
No disruption/Commuter



They told me the next train to London was cancelled and I should get the next one
Major disruption/Business



It told me about what was going on why it was happening and what time I roughly get to my next destination
Minor disruption/Commuter



The information contained everything that I needed to know and that's why I think the information provided was tailored to my needs
Major disruption/Commuter



I asked staff about where I was going, and which platform and they tailored it to what I needed to know
No disruption/Leisure



We were held at a red light after getting on the train at the station The announcement explained this
Minor disruption/Leisure



The guard said that the severe overcrowding would ease at Derby as that's normally what happens on that service
Minor disruption/Business



There were staff in person informing us of changes which really helped
Major disruption/Commuter



The information received was all relevant to the journey I was taking
No disruption/Leisure

Information that was not tailored to their needs

On the other hand, those that thought it was not tailored, felt it was due to the information lacking detailed information in order for them to be able to make alternative plans. It was generalised information given to all passengers and not tailored to the journey in hand, meaning they had to find information elsewhere.

How was information not tailored to their needs?



Every other train came up but mine. It took so long before mine came up

No disruption/Leisure



They didn't specify how long it was going to be. It just said it's going to be holding up for a couple of minutes but didn't specify that adds a thing that you must improve on

Minor disruption/Business



I wish that there was some information other than a small print planned engineering works poster. Larger notices, including front and centre on all apps would be preferred

Major disruption/Leisure



It wasn't announced until I got to the station as the train was meant to be coming into the platform. I didn't have time to plan an alternative

Major disruption/Commuter



Translations into other languages would be really helpful

No disruption/Leisure



It was announced just one minute before the train was meant to have arrived which really wasn't helpful

Minor disruption/Leisure



They didn't announce the full impact that the delay would have whilst being on the train

Minor disruption/Leisure



It was very generic, and the alternative route didn't account for my time

Major disruption/Leisure



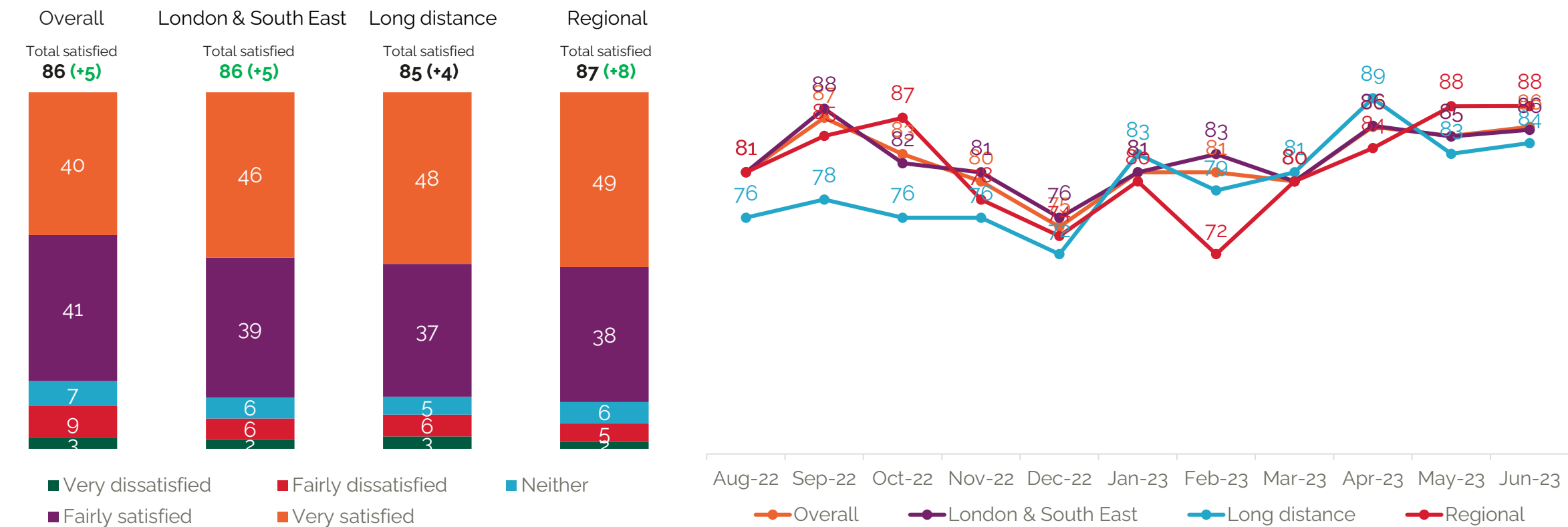
Did not give me enough information about which routes to get there

No disruption/Commuter

Overall satisfaction with information provision

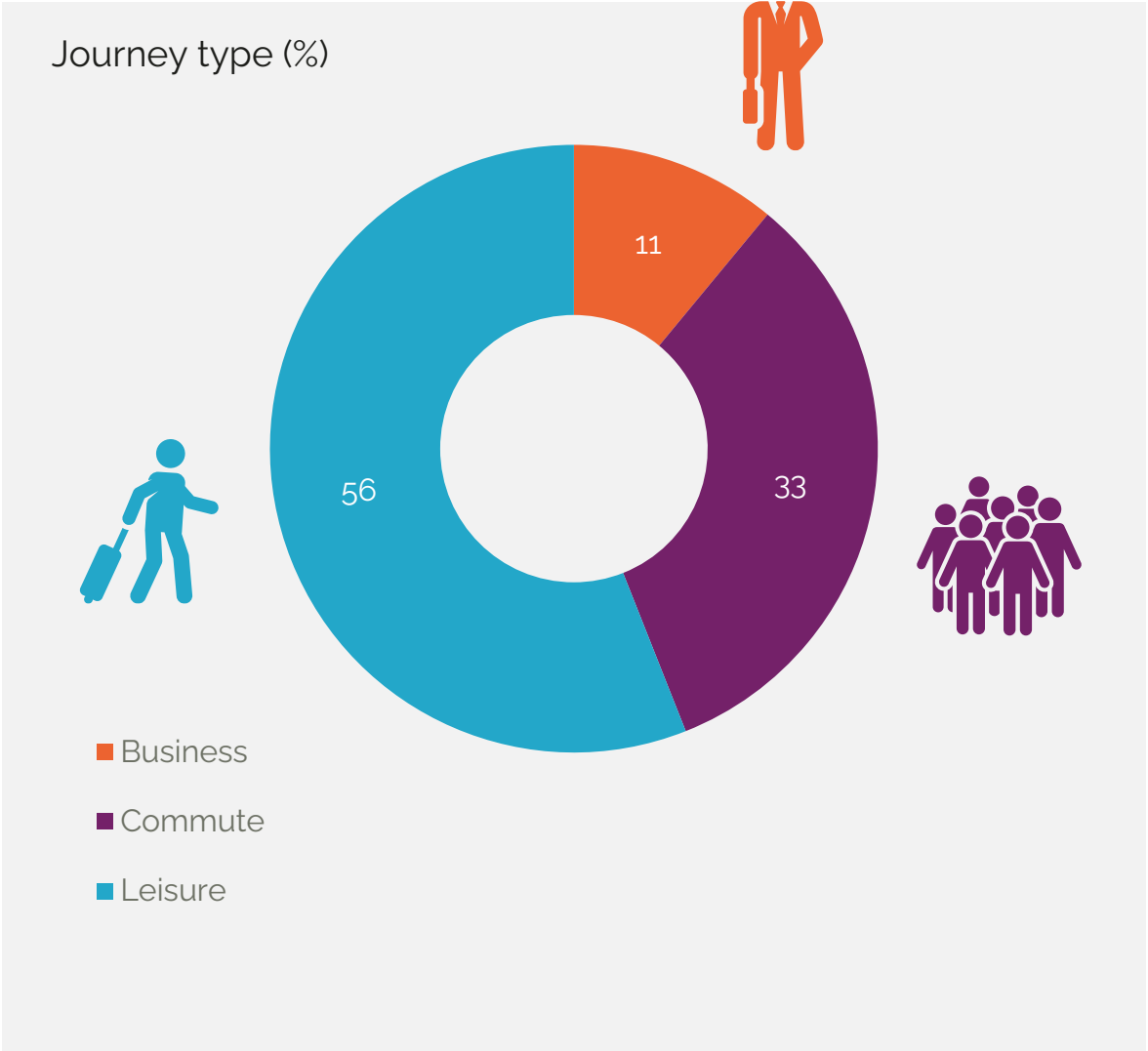
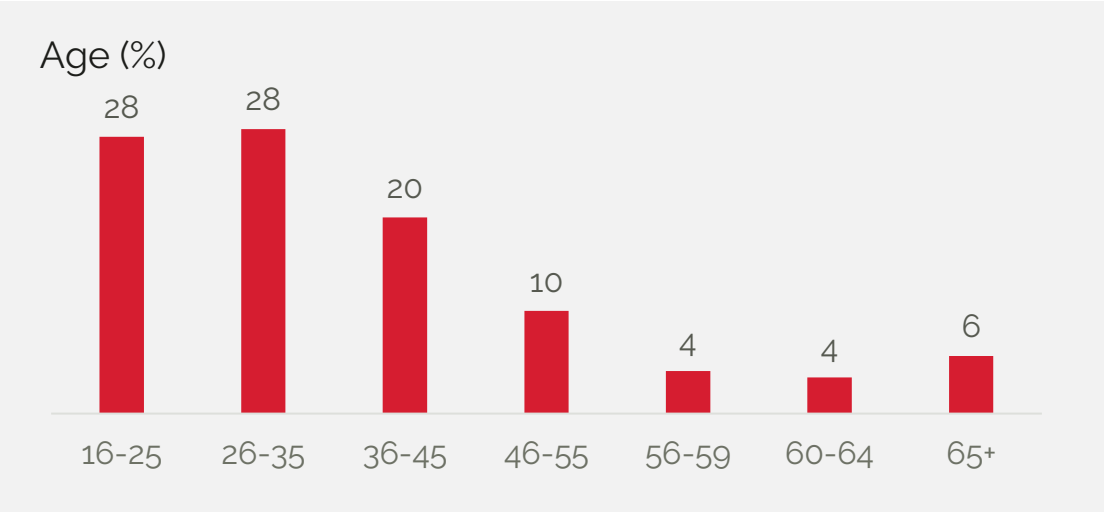
Satisfaction with the information provided has increased across all regions, with regional TOCs having improved the most this quarter.

Overall satisfaction with information provision by sectors (%)



Overall, how satisfied were you with the information provided during your journey? (excl DK)
Aug/Sept/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun 23 – Overall (1468/1089/852/834/870/694/590/710/811/786/1037), London + SE (784/643/488/475/503/392/326/374/464/439/589), Long Distance (357/219/197/179/178/152/143/180/176/178/218), Regional (325/223/165/180/189/150/121/154/170/168/228)

Demographics



Contact us



Thomas Folqué | Research Director



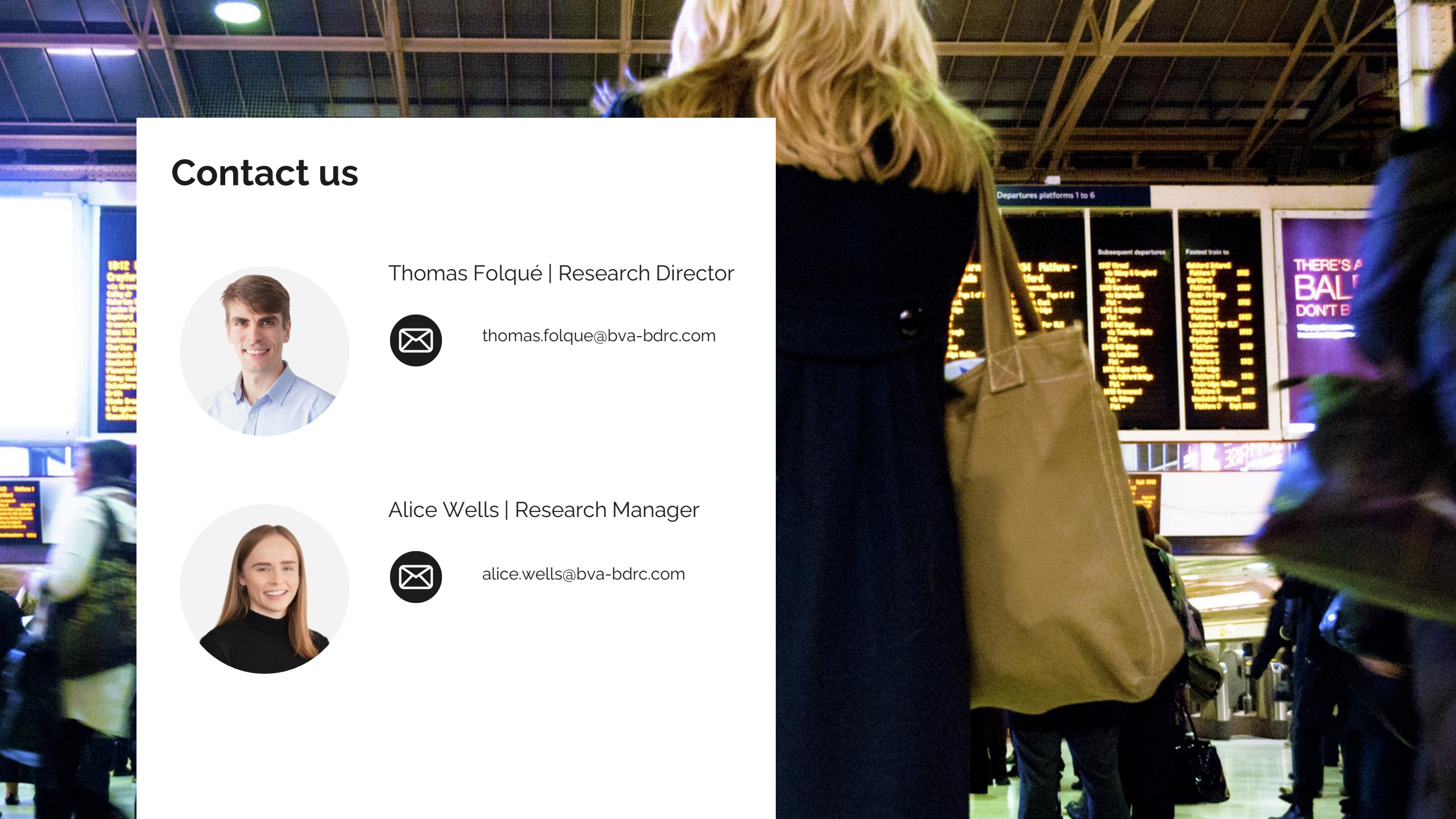
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Quality standards and other details

BVA BDRC is certified to ISO 20252:2012 and 27001:2013, the recognised international quality standards for market research and information security, thus the project has been carried out in accordance with these standards.

- We are working towards ISO 20252:2019 and expect to be fully certified to that by February 2023
- Adherence to the standard is independently audited once per year
- This project has also been carried out in conformity to the MRS Code of Conduct, GDPR, the UK's Data Protection Act, and all other relevant industry codes, legal and ethical requirements
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence with these same standards.

Full methodological details relevant to the project are available upon request.

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