Northern Transport Voices

Passenger priorities for rail in the North

October 2025

About Transport for the North

Transport for the North is a statutory sub-national transport body, working with mayoral combined authorities, local transport authorities and other stakeholders across the North of England. We advise central government on the strategic ambitions and priorities for the region's transport system, and work with our partners to enable delivery of investment.

Our vision is that by 2050 the North of England will have become a thriving, socially inclusive region. Our communities, businesses and places will have benefitted from sustainable economic growth, improved health and wellbeing, and access to opportunities for all. This is to be achieved through a transformed zero emission, integrated, safe and sustainable transport system, that will enhance connectivity, resilience, and journey times for all users.

For more information, please visit: www.transportforthenorth.com

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1.0 Executive Summary

Transport for the North (TfN) has conducted research focused on attitudes to rail travel in the North of England. The insights gathered through this research are intended to help inform new Outline Passenger Service Specifications for Northern and Transpennine Express rail services, which is expected to include factors such as rolling stock, train service requirements (including capacity), and station standard requirements.

The research involved an online survey with residents of the North of England covering a variety of topics related to rail travel. The survey questionnaire was developed in collaboration between the Rail North Partnership (RNP) and TfN.

The survey was delivered via TfN's online research community, Northern Transport Voices, between 14 February – 31 March 2025, achieving 694 completed and valid responses. Survey completion quotas were set in order to obtain 75% completed responses from train users (those who use trains at least once a year) and 25% from non-users. Non-users were only required to answer a sub-set of questions from the full questionnaire completed by train users.

Key findings

The key characteristics of current rail travel among train user respondents are travelling for leisure purposes, primarily visiting city and town destinations, and prioritising comfortable seating and cleanliness while onboard

- 60% of train user respondents said they travel by train for leisure purposes (e.g. sport, culture, events, day trips, going on holiday, etc), while 48% said they travel by train to visit family members or friends, and 39% said they travel by train to go shopping. In comparison, 18% use rail to travel to a place of work, and 20% use it to travel for work-related purposes. The findings are consistent with recent wider research which has identified leisure travel as the key market for rail following the Covid-19 pandemic[1].
- When asked to select the types of destinations they typically travel to by train, 56% of train user respondents indicated they travel to their nearest city or other cities within their region, while 42% said they travel to towns in their region. This was followed by airport destinations (25%), coastal destinations (24%) and rural destinations (18%)
- When asked to prioritise factors that matter to them most about the journey experience when onboard a train, seating and cleanliness emerged as the biggest priorities. 55% of train user respondents prioritised getting a seat on the train, followed by cleanliness of the train carriage, comfort of the seats, and cleanliness of toilets. Several other factors were important to at least a fifth of the train user respondents. These results are similar to previous research by Transport Focus.

There are indications of strong demand for more rail travel in future from current users, as well as from some non-users, with both groups

[1] Transport Focus (2023) Transforming rail travel - what do passengers want?

keen to see more destination coverage, more direct services, and more capacity on trains (factors consistent with the shift to more leisure-driven rail travel)

- 73% of current train users said they are likely to use trains more frequently in future, as did 33% of non-train users
- For current users, more direct services, more connectivity to desired destinations, and more seating capacity were the factors more likely to encourage future use, while for non-users these were more seating capacity, easier ticketing options, and more direct services
- Even though lower cost and greater reliability of services were not provided as options, many respondents specified those as 'Other' factors that would encourage more train travel, with the effect that 'Other' emerged as the 5th most popular response for current users, and 2nd most popular for non-users, so the findings above should be considered in that context. Previous research from Transport Focus[2] has shown that for all types of users (current, lapsed, and non-users) better value fares and more reliable services are within the top 3 factors that would encourage them to travel by rail (more).

Responses indicate that the destination types with greatest potential unmet demand from train users are towns and airports, as well as rural and coastal destinations, while there is also an indication of significant demand for travel at early and late times of day, particularly late evenings (10pm-12am)

- For current train users, the most desired types of destinations which they cannot (adequately) access currently are towns within their region (36%), airports (33%), and rural and coastal destinations (29%); while for non-users these are towns (29%), rural destinations (27%) and coastal destinations (25%)
- 43% of all respondents said that they would travel between 10pm and 12am if train services were available at this time. Less popular, although still potentially of interest to around a quarter of respondents, were the 12am-4am and 4am-6am periods
- For 10pm-12am and 12am-4am time periods, the respondents wanting to travel at these times were generally more likely to want to travel at these times on Friday and Saturday nights compared to other days of the week. This corresponds with growth in demand for rail travel on Saturdays observed by the rail industry. For the 4am-6am period, demand for travel was more consistent across the week, except for a higher percentage on Fridays
- Going to and returning from social events were the most common reasons given for why the respondents would want to travel during each of the three time periods asked about
- While social purposes were still the most common reason given for wanting to travel by train at 4am-6am, work-related purposes were more frequently selected as a reason for wanting to travel during this period than for other periods

[2] Transport Focus (2024) Motivations and barriers to train usage.

The majority of current rail users prefer not to have to change trains during their journey, but are willing to accept this in the absence of other options from their preferred station

- 17% of train user respondents said that changing trains does not bother them at all, while the majority (55%) said that they would prefer not to have to change trains, but would be willing to do so if there was no other option from the station they want to use. A quarter said they prefer direct services and would avoid taking train journeys that involve a change by choosing a different station to enable a direct journey (18%) or choosing an altogether different mode of travel for that journey (6%)
- Train users tended to value direct services more than having a frequent service or having the shortest overall journey duration, when asked to prioritise those three factors in comparison to each other
- Looking at different situations that may put passengers off from making a train journey that involves a change, large events (e.g. concerts, football matches) were most likely to have a negative impact on willingness to interchange. Commuting times, and the start/end of the school day were also times when more respondents than usual would avoid taking a train journey with a change. Situations such as travelling after dark, and bad weather conditions had the least impact
- Direct rail connectivity to cities and towns in their region, and cities in other regions (excluding London), were seen as highest priority compared to other destination types. Further down the priority order, direct services to regional airports ranked more highly than direct services to London, or direct services to rural and coastal destinations in the North
- When asked about the preferred minimum and maximum time duration for train interchanges, the majority of respondents (43%) said that they prefer a minimum of 10-15 minutes to make a change (though this differed a little between different demographic groups), while the maximum preferred overall time for an interchange was most commonly identified as 20-30 minutes (by 39% of respondents)
- The factor which respondents were most likely to say would improve the experience of changing trains was the ability to travel on the next suitable service (regardless of operator) if they missed their connection – this was important to over half of train user respondents. The next most popular factors were having more time available to get to the connecting train, and better information about the status of the connecting train

Although current train users are more likely to say that rail is important for their community, both users and non-users generally see rail as an asset for their community

- 82% of current train user respondents said that rail is ‘very important’ or ‘important’ for their community, as did 47% of non-users. Only 3% of users and 13% of non-users said that rail is ‘not at all important’ for their community

2.0 Introduction

Transport for the North (TfN) has conducted new research on attitudes to rail travel in the North of England. The insights gathered through this research are intended to help inform new Outline Passenger Service Specifications for Northern and Transpennine Express rail services, which is expected to include factors such as rolling stock, train service requirements (including capacity), and station standard requirements.

The research involved an online survey with residents of the North of England covering a variety of topics related to rail travel. The survey questionnaire was developed in collaboration between the Rail North Partnership (RNP) and TfN.

The survey questionnaire gathered the following background information from respondents:

- Demographic characteristics, including age, gender, ethnicity, disability
- Location, including region within the North of England, and name of train station used most often to begin rail journeys
- Current frequency of rail travel
- Journey purposes for rail journeys
- Types of destinations for rail journeys
- Modes of travel used to get to the rail station used most often to begin rail journeys

The themes explored in the survey included:

- Likelihood of travelling by rail more frequently in future, and factors that would encourage respondents to use rail more frequently in future
- Types of destinations that rail users would like to be able to get to by train, but currently cannot access
- Potential demand for earlier and later rail travel, and the journey purposes for this
- Factors that are most important for the on-board journey experience
- Preferences regarding rail journeys that involve changing trains
- Importance of rail for communities

The online survey was delivered to members of Northern Transport Voices, TfN's online research community. Northern Transport Voices was launched in January 2023 and brings together residents of the North of England to discuss topics relating to transport in our region. Members of the community are invited to engage in an ongoing programme of research activities, designed to provide new evidence on transport behaviours, needs, challenges, and opportunities in the North, to inform the development of transport policies and interventions. At the time of delivery of this research, the community numbered 1,200 members from across the North of England.

For this online survey, quotas were set for the number of completed responses by respondents' frequency of rail use.

As the findings from this research were intended to help inform the upcoming long-term train service specifications for the key regional rail operators, it was important that the research captured the thoughts and experiences of those who use trains the most, as any decisions will have the largest impact on them.

At the same time, this research also intended to gather insights from non-train users on what is important regarding train travel for them, and how they could be encouraged to use the network in the future.

Survey completion quotas were therefore set in order to obtain 75% of completed responses by train users (defined as those who travel by train at least once a year) and 25% by non-train users (defined as lapsed users (who currently use trains less than once a year, but used trains more frequently in the past) and non-users (who don’t use trains at all)).

For comparison, in 2023 Transport Focus[3] carried out a study with a sample nationally representative of the population of Great Britain according to age, gender, region, social grade, and ethnicity. In that study, 66% of respondents said they currently use trains at least once a year, 10% said they use trains less than once a year, 10% said they are not currently travelling by train, but they used to (lapsed users) and 14% said they don’t use trains (non-users).

Survey fieldwork started on 14 February 2025 and closed on 31 March 2025, with 694 completed and valid responses retained for data analysis.

Please see Appendix A for further details about the demographic profile of the respondents, and Appendix B for more information on train stations which respondents most commonly identified as the station where they begin most of their train journeys.

For the analysis of quantitative data, data tables were created for each survey question, along with cross tabulations to explore relationships between different variables. These tables were then analysed to identify key data points and potential patterns or relationships.

For the analysis of qualitative data, manual thematic analysis was performed to identify key themes (for some questions this was assisted by AI-powered text analysis software).

The data in this report has not been weighted for demographics or any other factors.

[3] Transport Focus, 2024, Motivations and Barriers to Train Usage

3.0 Research Findings

3.1 Current Train Use

3.1.1 Current train use frequency

Figure 1 shows a breakdown of train use frequency among all respondents (this excludes light rail (tram or metro) services). Please note the information in the Introduction to this report regarding the quotas set for completed responses by train use frequency.

75% of respondents to the survey are categorised as train users, which is defined in this report as those who use trains at least once a year. 19% use trains at least once a week, 20% use them at least once a month, and 22% use them at least once every three months. A slightly smaller proportion (15%) reported using the train at least once a year.

Lapsed users (defined as those who currently use trains less than once a year, but used to use them more often) accounted for 17% of all respondents, and non-users (who don't use trains at all) accounted for 8% of all respondents. The latter two groups combined are categorised as non-train users (25% of respondents in total).

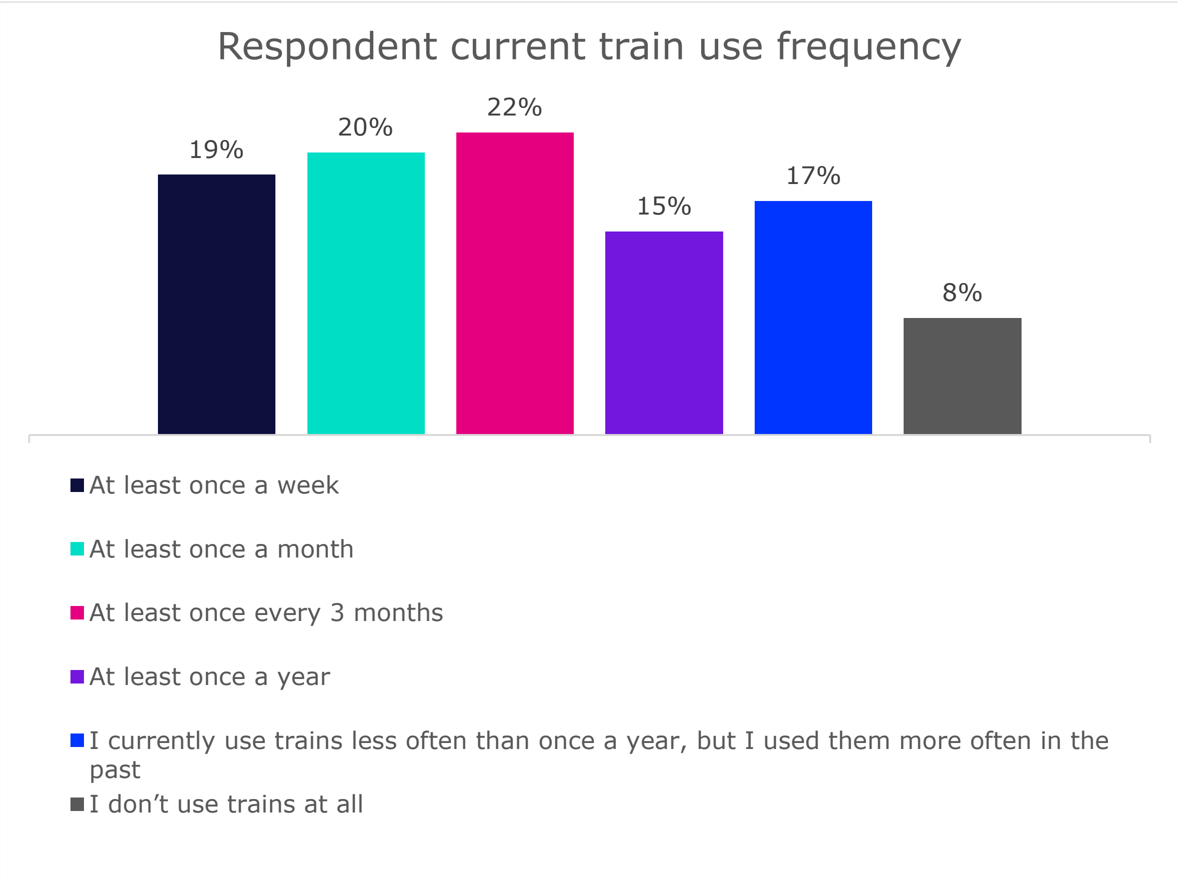

Figure 1: How often do you currently travel by train (excluding light rail/tram/metro services)? Excludes ‘Don’t Know’. Respondents N.: 694.

3.1.2 Train journey purposes

Train users were asked for more details about their train use, including what purposes they use rail services for.

By some distance, the most common purpose respondents used the train for was leisure (60%). Similar purposes were also common. 48% said they used the train to visit family or friends, and 39% said they used it for shopping.

While some way off the popularity of other purposes, a notable proportion used the train for work-related reasons. 20% used it for travelling for work purposes, and 18% for travelling to place of work.

These results highlight the importance of the leisure market for the train network and the need to cater to those who use the train for this purpose.

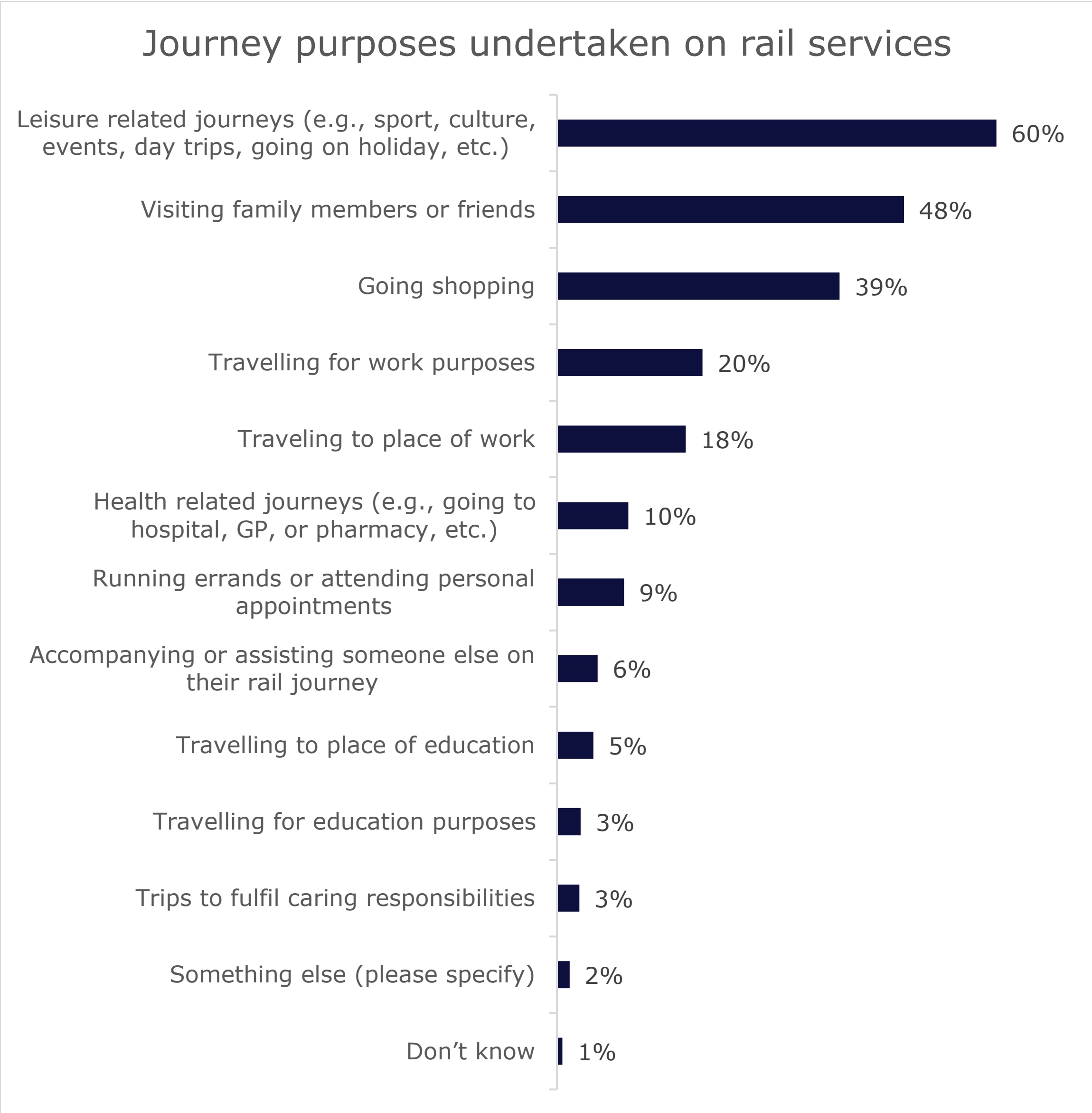

Figure 2: What is typically the purpose of the journeys you currently undertake on rail services? Please select all that apply. Train users only. Respondents N.: 520.

3.1.3 Destinations for train travel

Train user respondents were asked to say, based on a list of destination types, which they typically travel to by train.

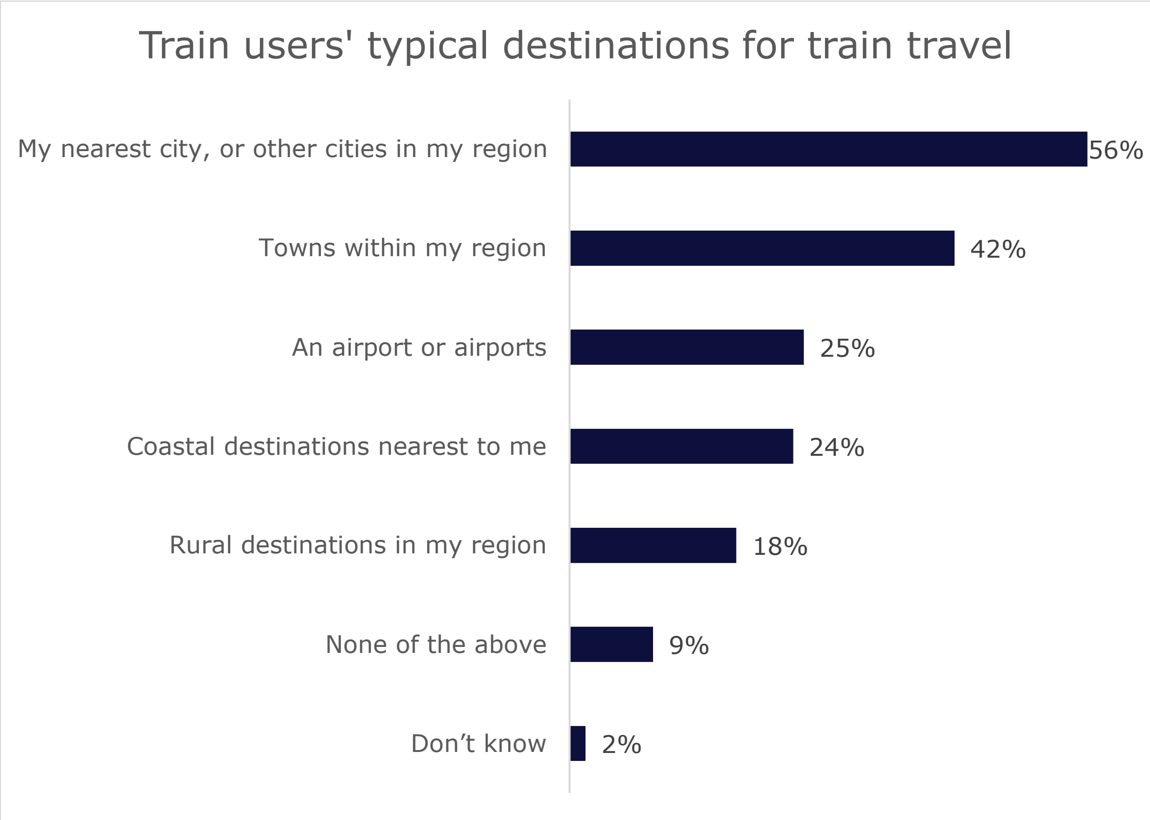

Figure 3: Which of the following types of destinations, if any, do you typically travel to by train? Please select all that apply. Train Users only. Respondents N.: 520.

Figure 3 shows the range of options given, and that the most commonly selected was their nearest city and other cities in their region, with 56% typically using trains for this destination. This was followed by 42% using trains to go to towns in their region. These options, being the first and second most selected, highlight the importance of trains being used as a way to access highly populated urban centres.

Rural and coastal places were the least often selected typical destinations by train user respondents, although they were still selected by a notable proportion, with 18% and 24% selecting these, respectively.

3.1.4 Getting to the station

Figure 4 shows the range of modes that train user respondents use when getting to their primary station (the station where they said they start most of their rail journeys). The respondents were initially asked to select all of the different modes they use as part of the journey to get to the station, and were then also asked to identify the primary mode (the mode they use for the longest duration of time during the overall journey).

When looking at Figure 4 and the modes used for at least some part of the journey to the station, walking or wheeling were the most common, as 43% of respondents usually walk or wheel as part of their journeys (wheeling means travelling with the use of a wheelchair, mobility scooter, or rollator).

The bus was also a popular mode of travel to the train station, with 34% of respondents usually using it as part of their journey to the station. Private cars and taxis were also common, although less so than the previously mentioned options.

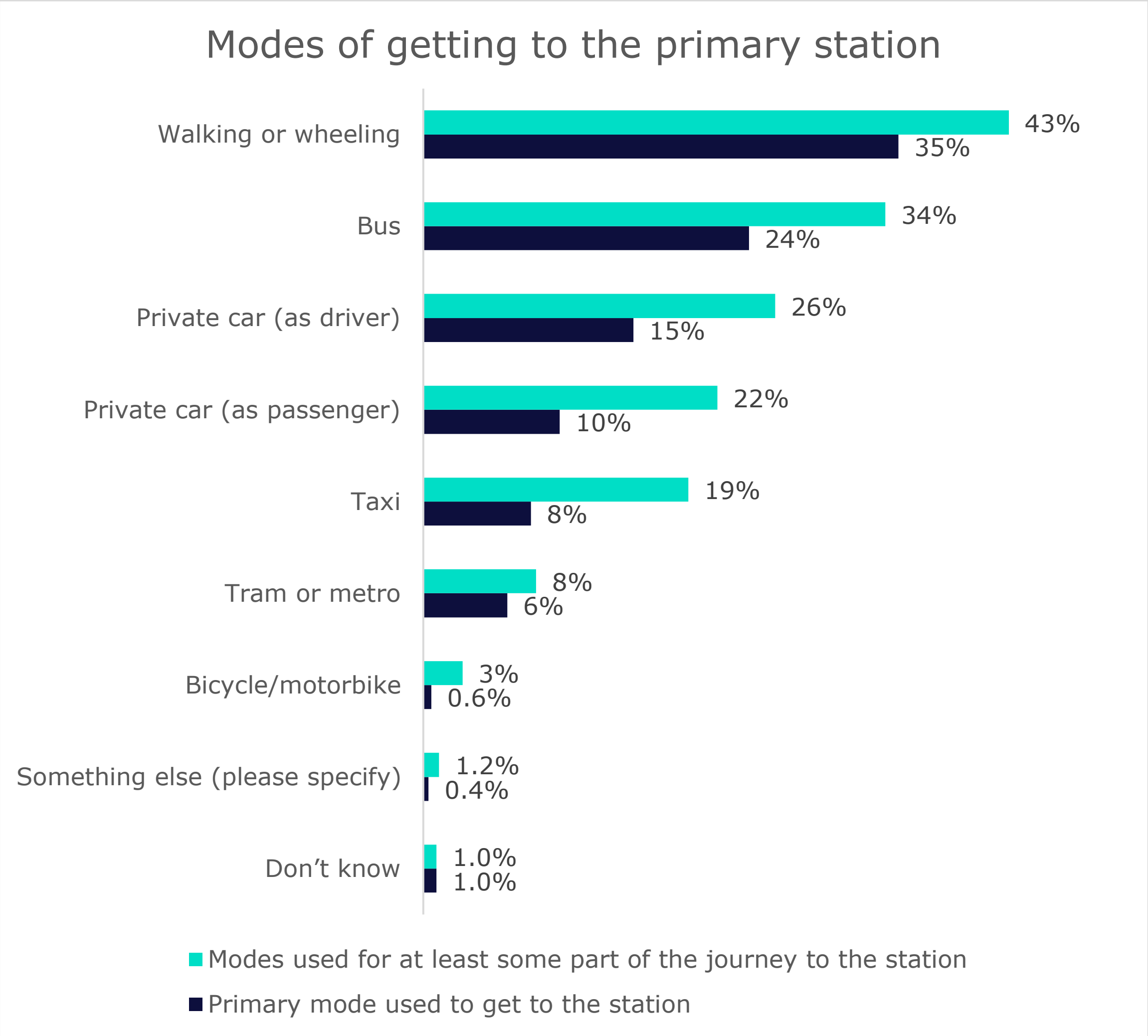

Figure 4: Which of the following modes of travel do you usually use to get to your primary station? Please select all that apply. And Please select the mode of travel that you use for the longest duration of time during your journey to your primary station? Train users only. Respondents N.: 520

When looking specifically at the primary mode of getting to the station, walking or wheeling was again most common with 35% selecting this as the primary mode. This was similarly followed by the bus (24%), private car as driver (15%) and private car as a passenger (10%).

As well as modes, respondents were asked about the distance they travel to their primary station. Respondents who are train users generally travel 5 miles or less to their primary station, with 77% doing so. However, many respondents travelled less than this, with 50% travelling 2 miles or less and 22% travelling less than 1 mile. Only 7% of train user respondents travel more than 10 miles to reach their primary station.

The primary modes used (the modes respondents use for the longest duration of time as part of their overall journey) tend to differ by the distance travelled. For shorter distances, 2 miles or less, walking or wheeling is the most common primary mode. 59% of respondents who travel 2 miles or less said walking/wheeling is their primary mode. For those travelling less than a mile, this is 79%. For distances over 2 miles, modes such as the bus and private car are more common.

3.1.5 Experience on board trains

Train user respondents were asked about what was important to them when they were onboard a train. They were given a list of options and asked to select up to three. Figure 5 shows the results.

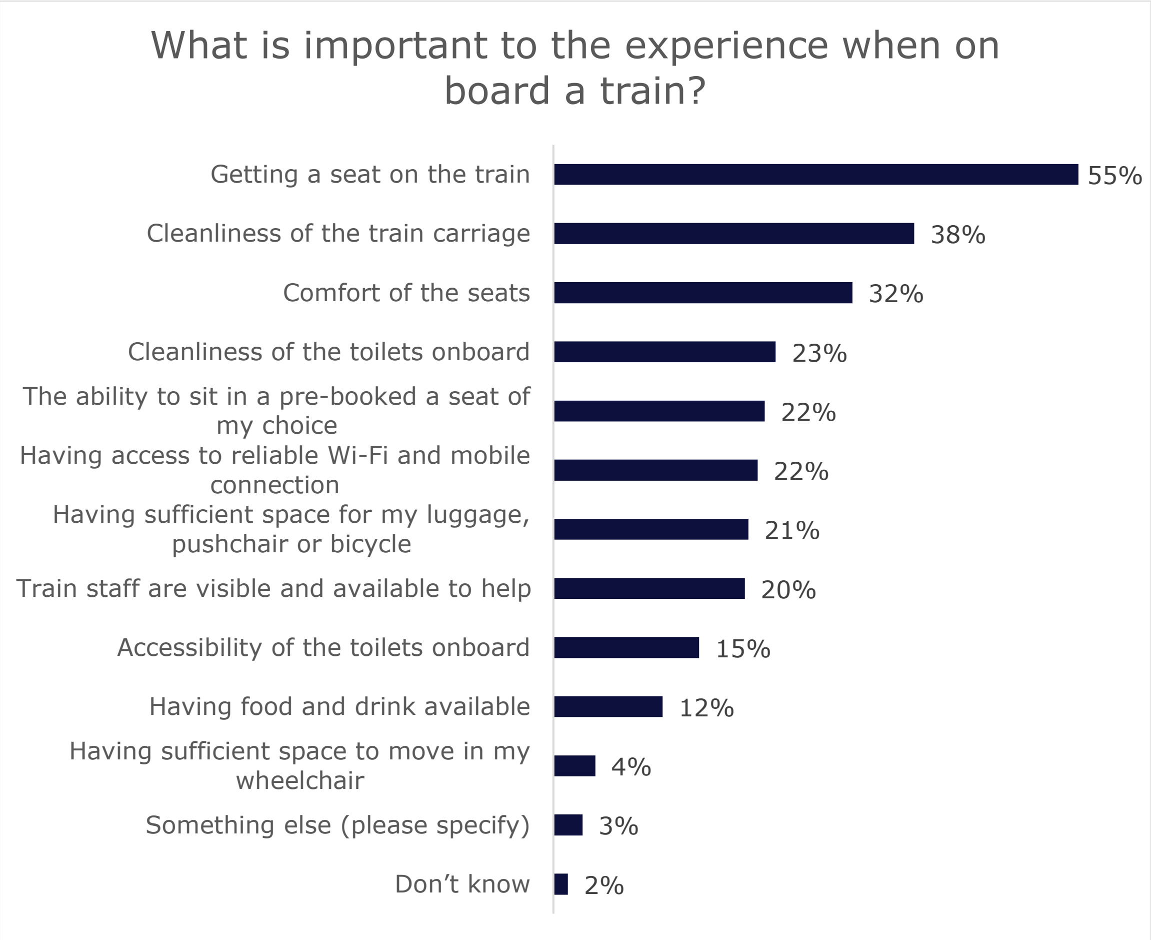

Figure 5: Which of the following factors are most important to you in terms of your journey experience when on board a train? Please select up to three options. Train users only. Respondents N.: 520.

The most commonly selected option for being important for journey experience on board was getting a seat, with 55% of train user respondents selecting this. Relatedly, the comfort of the seat was also selected as being important by a notable proportion, with 32% selecting this. Alongside the importance of seating, many train user respondents also regarded factors relating to cleanliness as important, with 38% of respondents selecting the cleanliness of the train carriage as important and 23% selecting the cleanliness of toilets.

These findings are similar to previous research by Transport Focus[4] *which found that in terms of on-train experience, getting a seat on the train and cleanliness inside the train were important factors. Personal security on the train also rated highly in the research by Transport Focus, although it did not rate as highly in this survey.*

In the last wave of Transport Focus' National Rail Passenger Survey (Spring 2020)[5]*, cleanliness inside train, level of crowding, and comfort of the seats were the most significant on-board factors that had the biggest impact on overall satisfaction with rail journeys.*

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[4] Transport Focus & Network Rail (2022) Britain's Railway: What Matters to Passengers – Summary Report.
[5] Transport Focus (Spring 2020) National Rail Passenger Survey – Main Report.

3.2 Future Train Use

3.2.1 Future train use frequency

Respondents were asked about their views regarding their future train use - whether they are likely to use the train more in the future, and what would encourage them to do so.

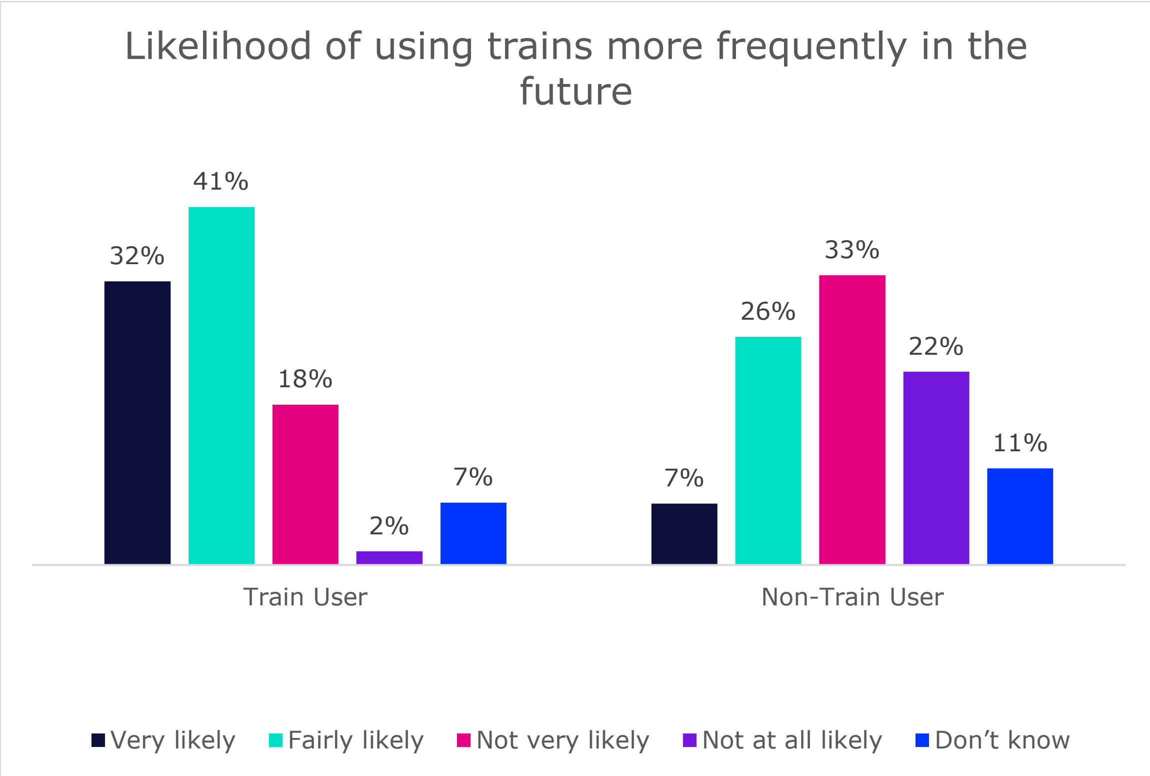

Figure 6: How likely are you to use trains more frequently in future?. Train User Respondents N.: 520. Non-Train User Respondents N.: 174.

For current train users, Figure 6 shows that a strong majority (73%) said they were likely to use trains more frequently in the future. This includes 32% who said they were 'very likely' to use trains more frequently. Only 20% said they were unlikely to use trains more frequently, and 7% did not know.

The proportions of users intending to travel more often were slightly higher than those found in research by Transport Focus[6] which found that 68% of current train users would consider using the train more frequently in future (13% 'definitely', 19% 'probably', and 36% 'possibly').

The picture is different for non-train users, as these respondents were more likely to say that they were unlikely to use trains in the future. 55% said they were unlikely to use trains more frequently in the future, with 22% saying this was not likely at all. However, a notable proportion, 33%, said they were likely to use trains more frequently in the future.

[6] Transport Focus (2024) Motivations and Barriers to Train Usage.

3.2.2 Factors that would encourage future train use

To see what would encourage respondents to use the train more, they were presented with a range of options and asked to select up to three that would encourage them most. Figure 7 shows the results.

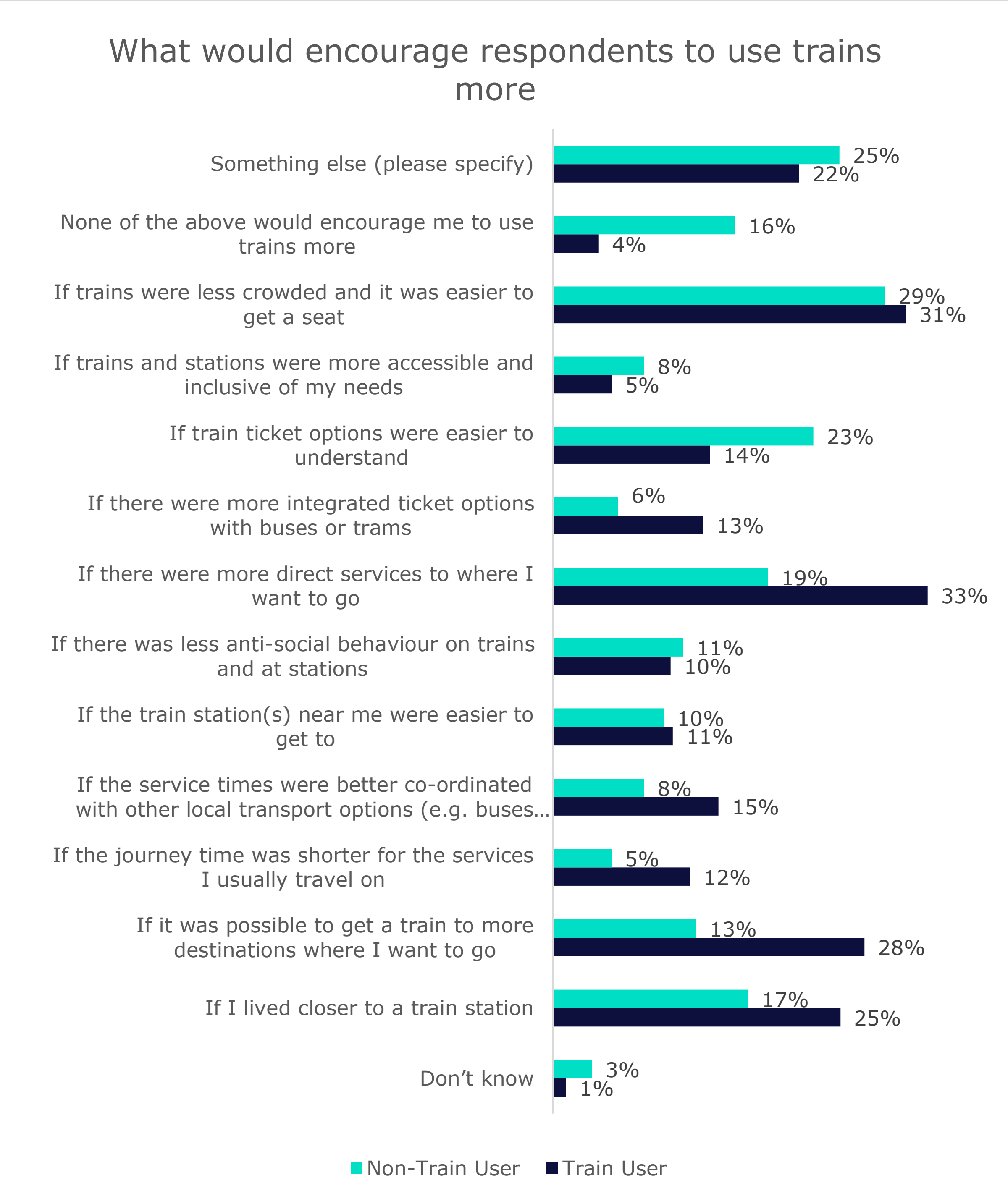

Figure 7: Which of the following reasons, if any, would most encourage you to use rail services in future? Please select up to three answers. Train User Respondents N.: 520. Non-Train User Respondents N.: 174.

It's important to note that two options that scored highly in pre-existing research on this topic – cheaper fares and greater reliability of services – were not provided as response options in this survey. However, many respondents specified those types of factors as 'Other' factors that would encourage more train travel. The effect of this is that 'Other' emerged as the 5th most popular response to this question for current users, and 2nd most popular for non-users, so the findings below should be considered in that context.

For train users, the top three most significant factors that would encourage more frequent use of rail were having more direct services to where they want to go (33%), trains being less crowded and being able to get a seat (31%), and the ability to travel to more destinations that they want to go to (28%).

For comparison, research from Transport Focus[7] found the following factors would most encourage current users to use train services more in future: better value fares (59%), more reliable services (29%), fewer strikes (25%), living closer to a train station (22%), more frequent services (21%), less crowding on trains (21%) and more services to more destinations (18%).

Among non-train users, the largest number of respondents selected less crowding and it being easier to get a seat (29%).

The third most popular option for non-users (after 'Other') was having ticketing options that are easier to understand (23%), highlighting the complexity of rail ticketing as an important barrier for lapsed and non-users. Lack of proximity to the rail network also appears to be a barrier for many in this group, as 17% said that they might use the trains more if they lived closer to a train station.

For comparison, Transport Focus[8] research found that the following factors would most encourage lapsed users to use their local rail service once again: better value fares (38%), more reliable services (21%), living closer to a train station (21%) and less crowding on trains (16%). Similar factors were also most commonly selected by non-users in that study, except that having more destinations available to go to was also an important motivator for non-users.

16% of non-train user respondents said that none of the presented options would encourage them to use trains, showing that some non-users are unlikely ever to use trains (again), regardless of potential improvements. However, this also leaves a large percentage (84%) that could be encouraged to use rail if specific measures that appeal to them were explored.

3.2.3 Desired destinations for train use

When turning to look at destinations that respondents would like to be able to reach by train but currently cannot, Figure 8 shows that across both train users and non-train users, the most commonly selected option was wanting to get to towns within their region. This suggests a desire for more local connectivity.

[7] Transport Focus (2024) Motivations and Barriers to Train Usage
[8] Transport Focus (2024) Motivations and Barriers to Train Usage

Rural and coastal destinations were also commonly selected, perhaps highlighting a desire for more leisure locations.

One of the most significant differences between destinations selected by train users and non-train users is for connections to an airport. For train users, this was the second most commonly chosen option. This highlights that many train-using respondents would be willing to use the train to get to an airport if this were an option. Meanwhile, non-train users who may be less familiar with the train network were much less likely to want a train connection to an airport.

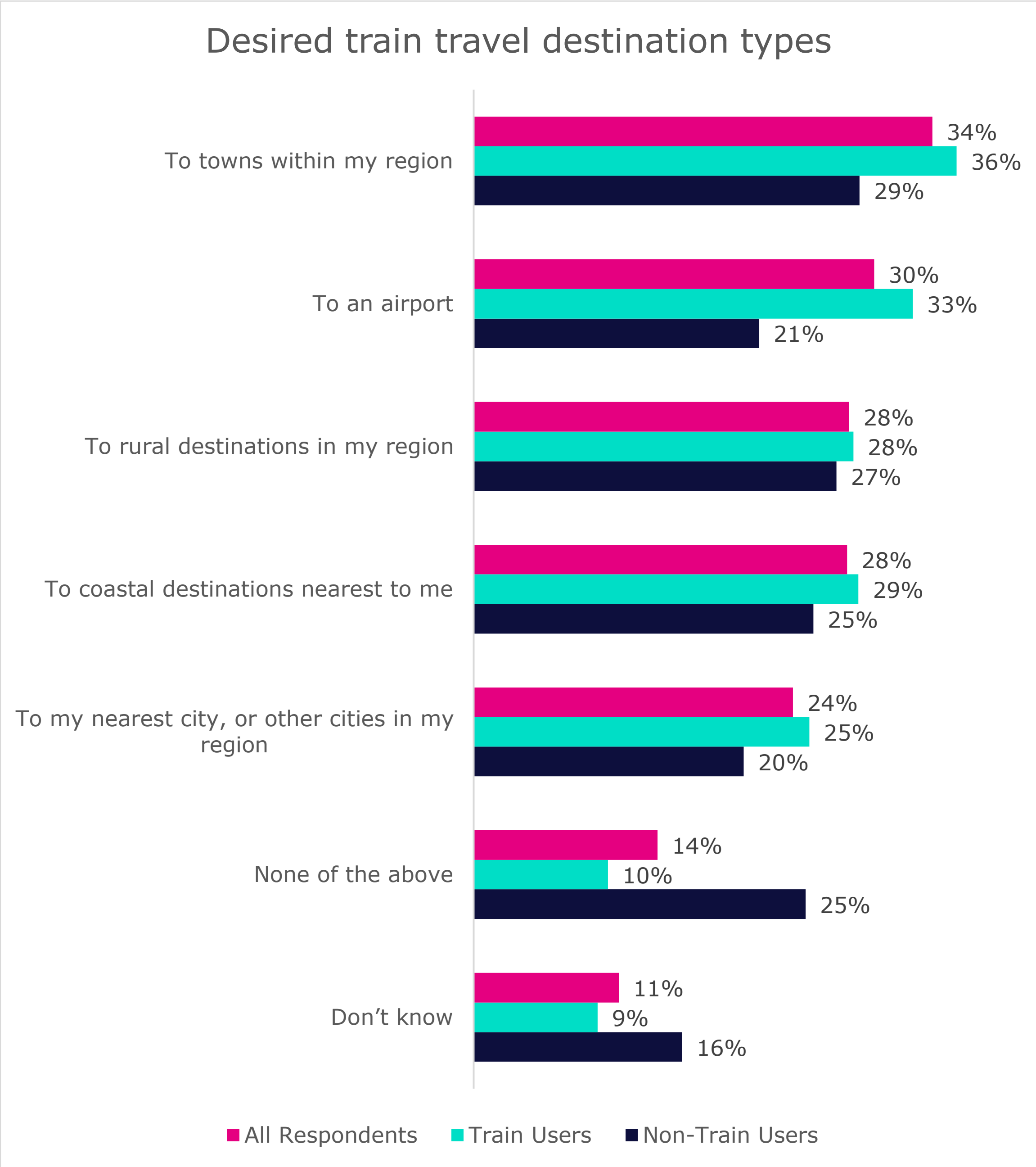

Figure 8: Which of the following types of destinations, if any, would you like to be able to get to by train (using one or more trains), where there is currently no train service? Please select all that apply. All Respondents N.: 694. Train user respondents N.: 520. Non-Train User Respondents N.: 174.

There were some notable differences when looking at the desired destinations by the typical destination respondents said they travelled to in Figure 3. With the exception of airports, train user respondents who said they typically use the train for rural destinations are among the most likely to desire every destination type asked about. Similar could be said for those who usually travel to coastal destinations. This suggests that those who use the train for those destinations may have limited destinations, leading to them desiring many other options. For rail users who typically travel to airports, a large portion, 46%, said they wanted more connections to airports that they could not reach by train.

Connections to their nearest city or other cities in their region were the least desired destination type for each typical destination group. This is potentially because cities are the most common typical destination, and it is likely that respondents were already well connected to their nearest city or cities in their region.

When given the option to specify names of any particular destinations which are not currently accessible to respondents by rail, but they would like them to be, a wide range of answers was provided, with some of the most popular responses being direct rail services to local airports (particularly Manchester and Leeds-Bradford), as well as connectivity to village and town destinations in Yorkshire Dales, North Yorkshire (particularly Ripon), Northumberland, and the Lake District (particularly Keswick).

3.2.4 Demand for earlier and later services

Many respondents said that they would travel at earlier and later times if train services were available. All respondents, both train users and non-users, were asked about whether they would travel at three time periods: 10pm-12am, 12am-4am, and 4am-6am.

10pm-12am was the time period when the largest proportion would travel, as 43% said that they would travel at this time if trains were available. The other two time slots were significantly less popular, although a considerable proportion of respondents would still travel at those times if trains were available. 24% of respondents would travel between 12am-4am, and 23% would travel between 4am-6am.

Just over a third of respondents, 36%, said they would not travel at any of the times asked about. Additionally, as would be expected, non-train users were much less likely to want to travel at any of the times asked about.

For those that said they would travel at a given time, the percentage that would be likely to travel at that time for each day of the week is shown in Figure 9. This shows that for 10pm-12am and 12am-4am, the respondents wanting to travel at these times were generally more likely to want to travel on Friday and Saturday nights. For 4am-6am, demand for travel is consistent across most days, except for a higher percentage on Fridays. These results may be explained by the purpose respondents gave for why they may travel when they said they would.

Figure 9: If available, when would you be likely to travel by train? Please select all that apply. 4am-6am Respondent N.: 163. 12am-4am N.: 166. 10pm-12am N.: 295.

Figure 10 shows that going to and returning from social events were the most common reasons respondents gave for travelling across each of the three time periods asked about. This could explain why Friday and Saturday were the most common days that respondents said they would want to travel at the times asked about.

The purposes given for 4am-6am differ somewhat from those given for 10pm—12am and 12am-4am. While social purposes are still the most common reason given for wanting to travel by train at 4am-6am, respondents were much more likely to say they would travel for a purpose related to work during this period than they did for other periods (around a quarter said they would travel for work purposes during this period, and a similar proportion said they would travel to a place of work during this period).

Of those who selected to specify a purpose themselves, different to the options provided, most answers related to travelling to or from an airport, or for leisure purposes.

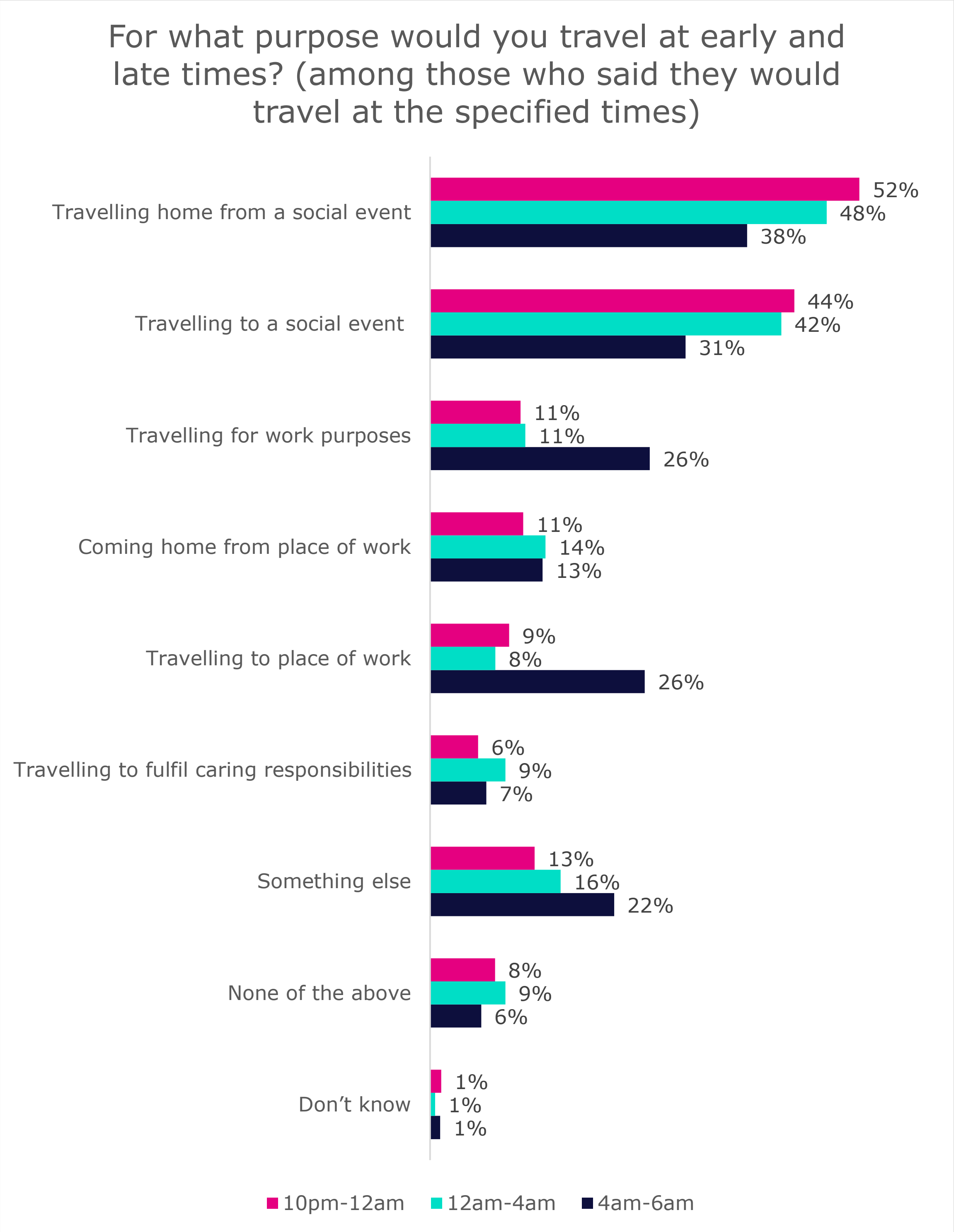

Figure 10: For what reason would you travel at the time? Please select all that apply. 10pm-12am N.: 295. 12am-4am N.: 166. .4am-6am Respondent N.: 163

3.3 Changing Train During a Journey

3.3.1 Preferences around changing trains during a journey

A key area of interest in this research was understanding attitudes to having to change trains as part of a journey to reach a destination. Figure 11 shows train user respondents' preferences concerning changing trains.

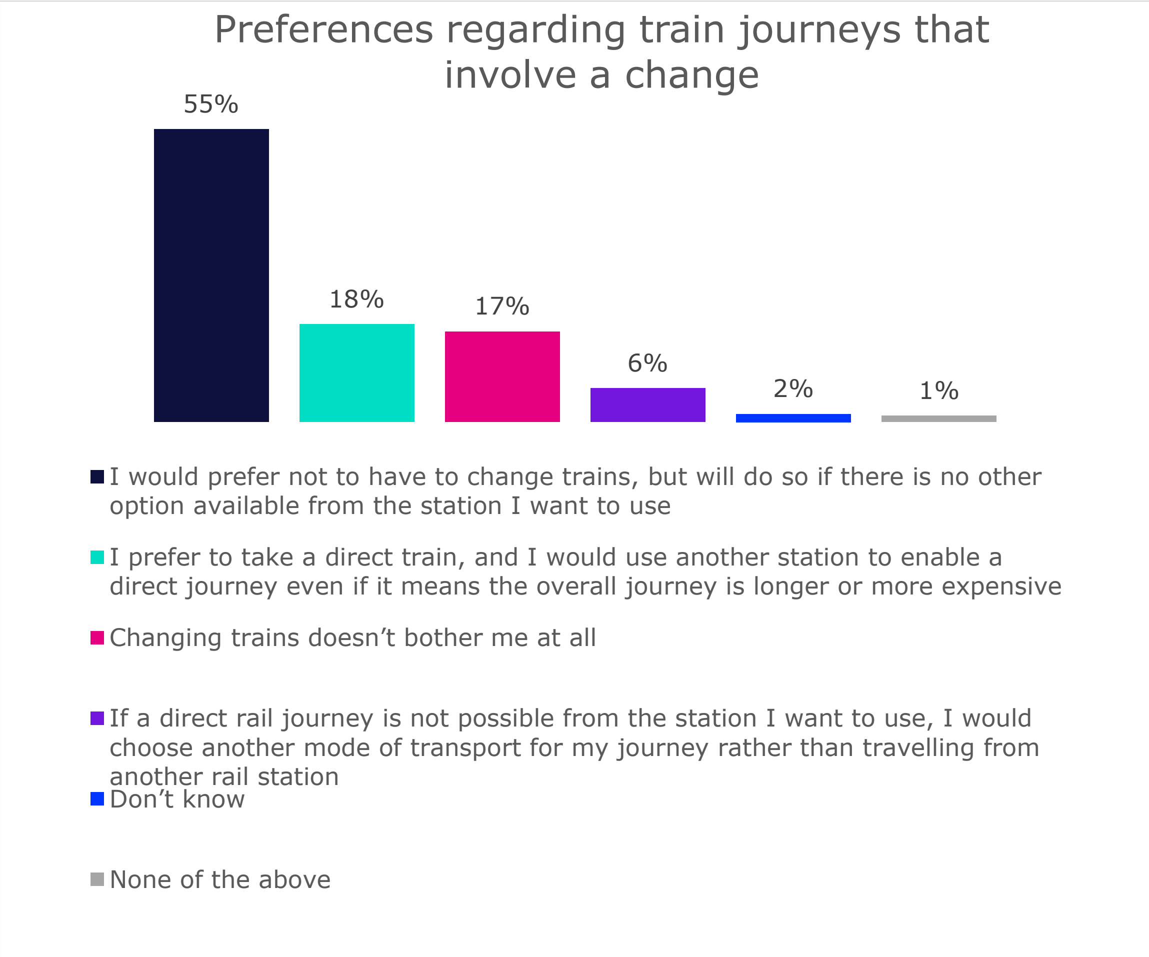

Figure 11. What is your preference regarding having to change trains as part of a rail journey? Please select all that apply. Train users only. Respondents N.: 520

17% of train user respondents said that changing trains doesn't bother them at all, while the majority (55%) would prefer not to change trains, but would do so if there were no other options available from the train station that they want to use.

Just under a quarter (24%) of train user respondents said they prefer direct services, and would avoid taking train journeys that involve a change, by choosing a different station to enable a direct journey, even if that means the overall journey is longer or more expensive (18%) or choosing an altogether different mode of travel for that journey, rather than travelling from another train station (6%).

For comparison, in a study commissioned by Transport Focus and GBRTT[9], 65% of current rail passengers said that for journeys where they have to change trains, their overall satisfaction with the journey would increase if they could get to that destination without having to change trains.

3.3.2 Prioritising direct services versus service frequency and journey duration

Train user respondents to this survey tended to value direct services more than having a frequent service or having the shortest overall journey duration. Table 1 shows how they ranked these options compared to each other.

Option	Overall Ranking (3 Highest – 1 lowest)	Average Ranking (out of 3)
Having a direct service (no need to interchange)	3	2.3
Having a frequent service	2	2.0
Having the shortest overall journey duration	1	1.7

Table 1: How would you prioritise the following factors when travelling by rail? Only Train Users. Respondents N.: 469.

Train user respondents typically ranked having direct service as more important than both other options, with 51% ranking it as their highest priority of the three. This suggests that train user respondents to this survey tended to value the simplicity of a direct service more than having a highly frequent service or the shortest possible journey duration. This was consistent across different journey purposes that respondents said they use rail for.

For comparison, Transport Focus[10] in partnership with Network Rail commissioned a qualitative research study in 2022 which explored train passengers' views of different types of train timetable design, including whether they would prefer a 'higher frequency but more changes' model or a 'lower

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[9] Quadrangle for Transport Focus & GBRTT (2022) Potential rail industry initiatives: Passenger satisfaction analysis.

[10] Transport Focus & Network Rail (2022) Changing trains versus direct trains: Passenger views – Summary Report

frequency but more direct trains' model. Participants in the research either made journeys on direct trains that pass through Preston or usually changed from one train to another at Preston. *The study found that:*

- *In general, no single model of service design would suit all passengers all of the time*
- *disabled passengers and those travelling with luggage and/or small children who find changing trains difficult will almost always prefer a model which favours direct trains*
- *commuters and those familiar with the rail network will often prefer a service which favours high frequency and reliability*
- *those making leisure journeys were more open to a service design which featured trains running direct to more destinations, but at a reduced overall frequency*
- *having access to direct services is also a high priority for potential train users in terms of the way in which using a train compares with the ease, convenience, and directness of using a car*
- *passengers expressed a general dislike of having to change trains, however, many were interested in the higher frequency/more interchange model after hearing an explanation of the reliability benefits of such a model, although they would still want those benefits demonstrated in practice to fully accept this model*
- *even for those who were more open to a high frequency/more interchange model, ideally there would still be only one, or for longer journeys at most two, changes on a journey*
- *overall, passengers' top priority is the reliability of the service in terms of the predictability of their journey, even though this is initially less of a 'top of mind' consideration compared to other aspects of train service such as frequency, journey time or directness, which are more likely to be mentioned spontaneously.*

3.3.3 Impact of different situations on likelihood of avoiding interchanges

Different situations or contexts can affect the proportion of respondents willing to take a train journey with a change. Figure 12 shows the extent to which train user respondents would consider avoiding a trip with a change in various situations.

Taking the previously mentioned statistic of 24% of train user respondents who would generally avoid trains with a change as a baseline to compare against, many of the listed situations had an impact on further increasing the likelihood of avoiding a train journey with a change.

The situation that had the most significant impact on willingness to travel on a train journey with a change was the occurrence of a large event, such as a football match or a concert. 45% said they would definitely avoid a train journey with a change in this situation, and a further 32% said they would consider avoiding it.

Commuting times and the start/end of the school day were also times when more respondents than usual would avoid taking a train journey with a change. 32% said they would definitely avoid a journey with a change during commuting times, and 33% said the same for the start/end of the school day. Respondents who said they would avoid, or would consider avoiding, commuting times most commonly categorised this time as being between 7-9AM and 5-6PM.

Situations such as travelling after dark, and bad weather conditions, seemed to have less impact on the likelihood of avoiding a train journey with a change.

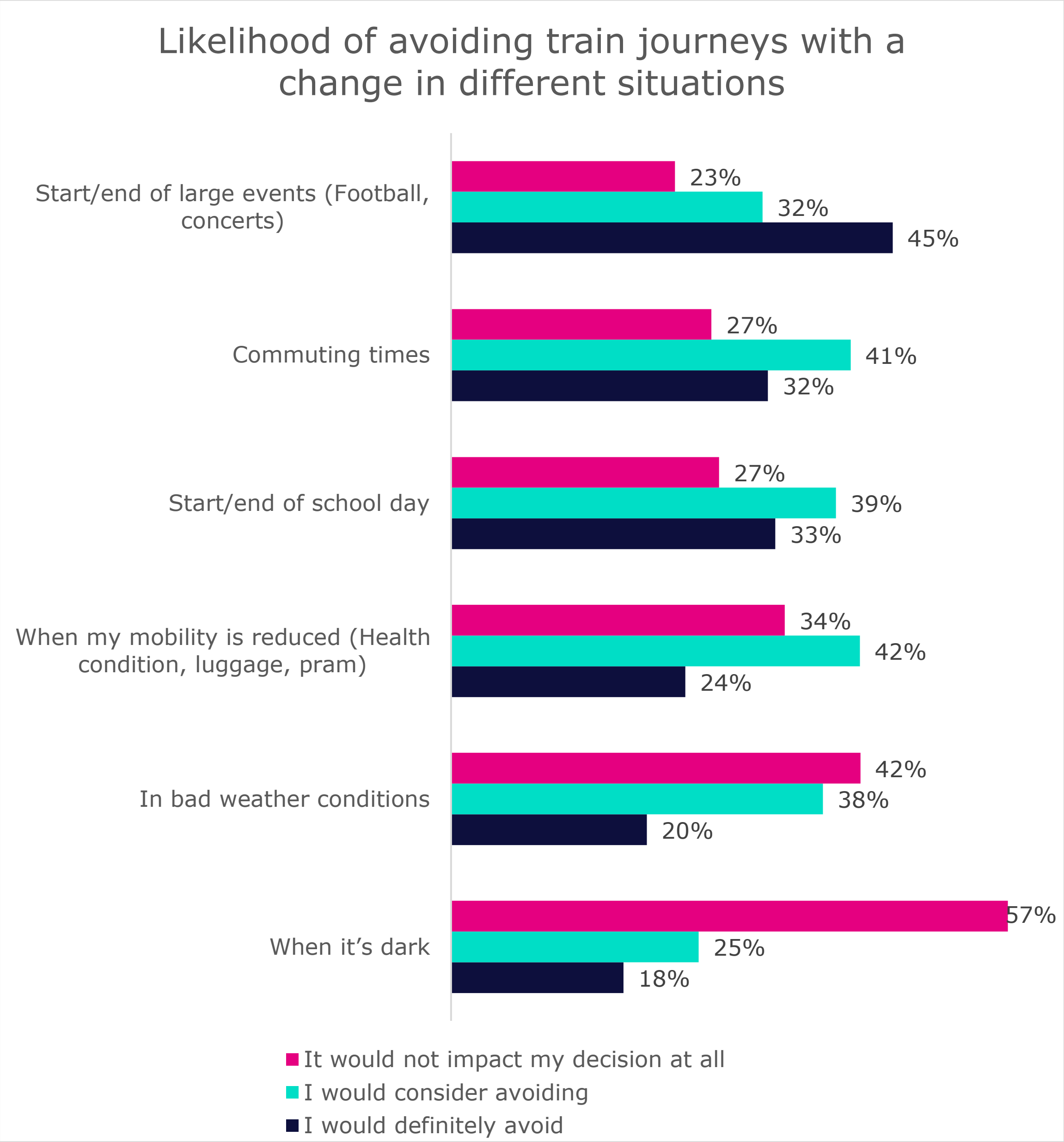

Figure 12: To what extent would you avoid taking a journey that involves changing trains in the following situations? Train Users only, excludes 'Not applicable' and 'Don't Know'. Start/end of large events (Football, concerts) respondents N.: 502. Commuting times respondents N.: 484. Start/end of school day N.: 485. When my mobility is reduced (Health condition, luggage, pram) respondents N.: 442. In bad weather conditions respondents N.: 494.

3.3.4 Prioritising direct services by destination type

Despite the clear value that respondents place on direct services, they are not always possible for every location. To understand how train user respondents would prioritise direct services by destination type, they were asked to rank a range of destination types in order of where they would prioritise having direct services (7 being the highest priority and 1 being the lowest). Table 2 shows the results.

Destination Type	Overall Ranking (7 Highest – 1 lowest)	Average Ranking (out of 7)
Direct service to my nearest city, or other cities in my region	7	4.7
Direct service to towns within my region	6	4.3
Direct service to other cities in the UK (excluding London)	5	4.1
Direct service to my nearest airport	4	4.0
Direct service to coastal destinations in my region or other regions	3	3.9
Direct service to London	2	3.5
Direct service to rural destinations in my region	1	3.4

Table 2: How would you prioritise having a direct rail service from your nearest rail station to the following destinations? Only Train users. Respondents N.: 504.

Most train user respondents ranked connectivity to cities and towns in the region as the highest priority, suggesting that respondents want to see straightforward connections to centres of population near them. The lowest ranked destinations in terms of priority for direct services were rural areas, and services to London.

3.3.5 Preferences for duration of train interchanges

When taking a journey that includes a change, train users must consider the amount of time between disembarking one train and boarding the next. The time needs to be enough to comfortably make that change, but not too long that a passenger finds themselves waiting for a long time, increasing the overall duration of their journey.

Train user respondents were asked about the minimum amount of time they would generally want available to make a change, and the maximum wait between trains they would be prepared to accept.

Figure 13 shows the train user respondents' response when asked about the minimum time they prefer to have available when changing trains. The most common answer was 10-15 minutes, with 43% of respondents selecting this option. 5-10 minutes and 15-20 minutes were also selected often, being selected by 25% and 21% of train user respondents, respectively. Up to 5 minutes tended to be too little for most, with only 3% selecting this. Only 8% felt they needed more than 20 minutes.

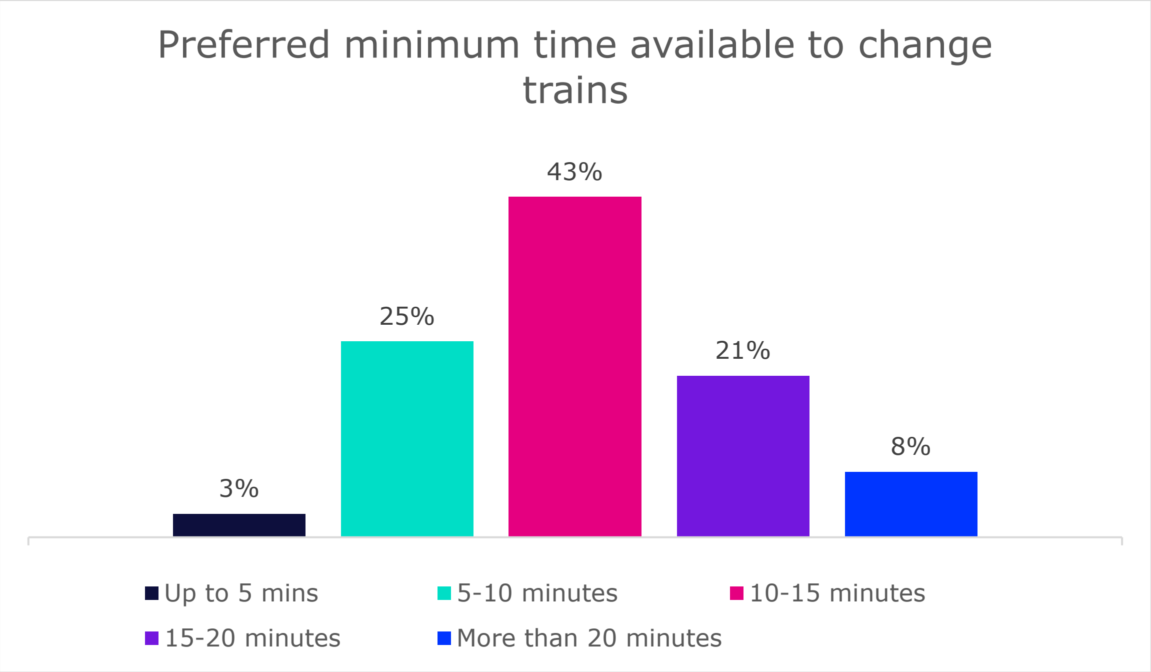

Figure 13: What is the minimum time that you typically prefer to have available to change trains during a journey? Please select one option. Only Train Users. Respondents N.: 506.

While these findings tended to be similar between different demographic groups, females, older people, and those with long-term health conditions generally wanted more time to make a change.

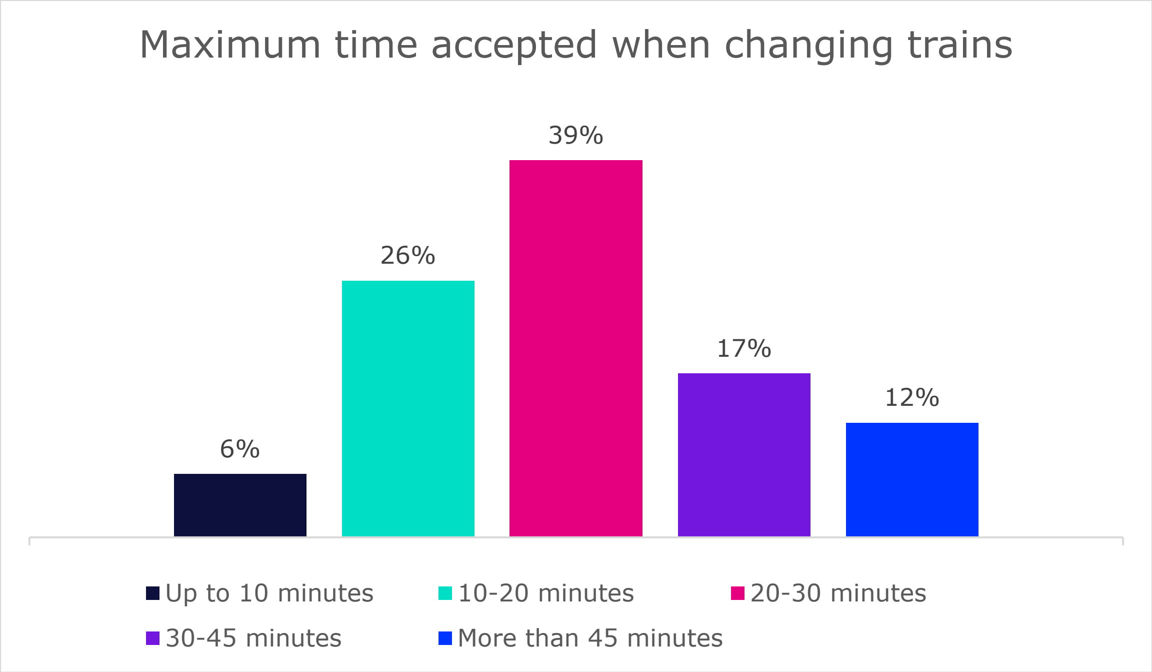

Figure 14: What is the maximum time that you are typically prepared to accept for a train interchange, before you would consider a different rail route or a different mode of travel? Please select one option. Only Train Users. Respondents N.: 494.

Respondents generally want time to make a change comfortably, but many do not want to be waiting for a long time. Figure 14 shows the maximum amount of time train user respondents are prepared to accept when changing trains. Most people, 39%, were willing to accept a window of 20-30 minutes when changing trains. 17% said they were prepared to accept up to 45 minutes, and 12% said they would accept more than 45 minutes. There were some that were less prepared to wait when changing trains; 26% said their maximum was 10-20 minutes and for 6%, it was up to 10 minutes.

3.3.6 Factors that could improve the experience of changing trains

To understand what factors are important for improving the experience of changing trains, train user respondents were provided with a list of options and asked to select up to three that were the most important for them.

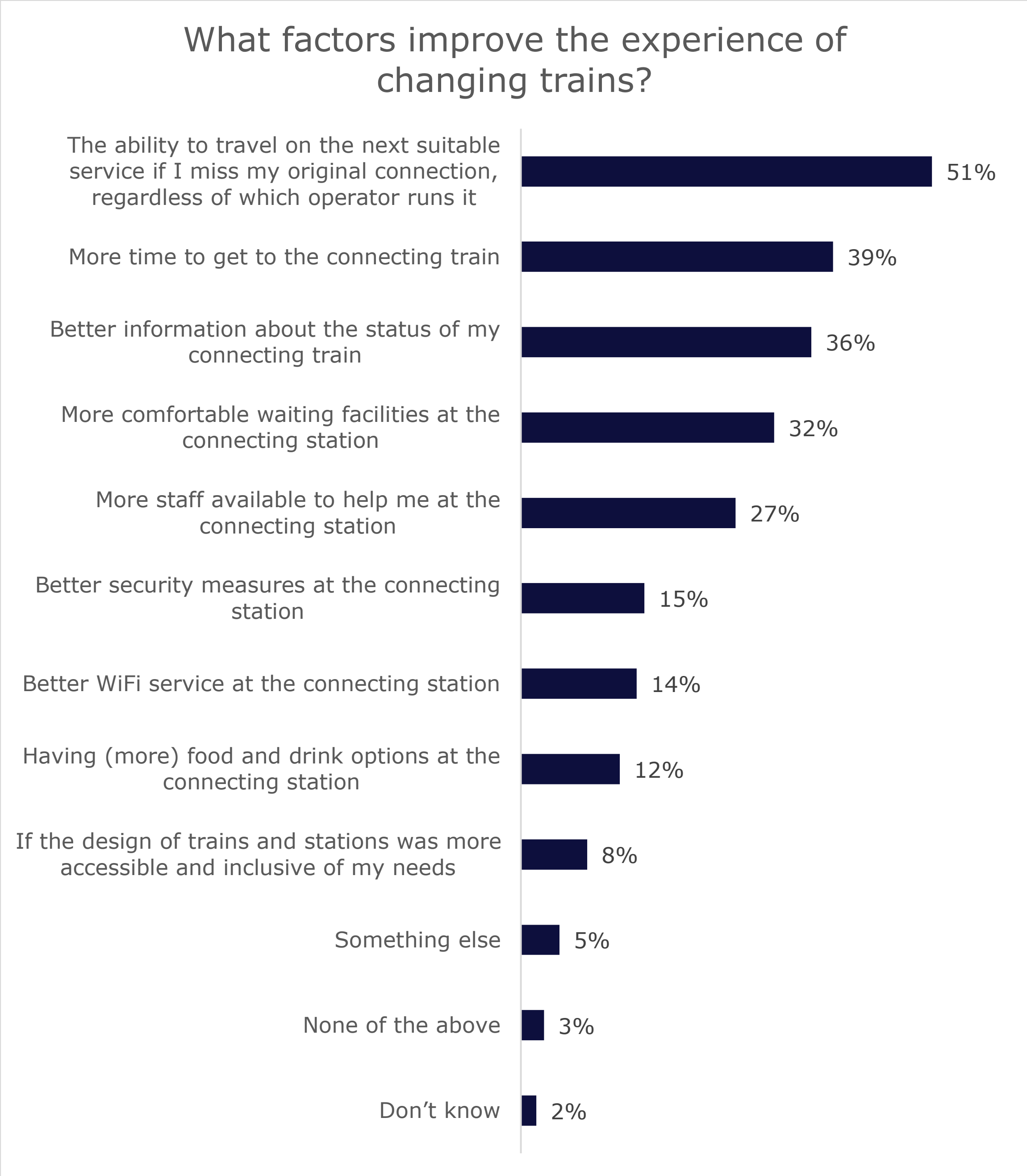

Figure 15: Which of the following factors, if any, would most improve the experience of changing trains for you? Train user respondents only. Respondent N.: 520

51% of train user respondents said it was important that they could use the next suitable train, regardless of the operator, if they missed their original connection. This may be down to the peace of mind this could provide, as it potentially means not being left for long periods of time, or having to pay for another ticket.

Other peace of mind factors also ranked highly. 39% selected having more time to get to the connecting train, and 36% selected having better information about the connecting train.

Facilities and support were also deemed important, with 32% selecting comfortable waiting facilities as important, and 27% selecting having more staff available to help them.

A qualitative study by Transport Focus[11] on passenger preferences between changing trains versus direct trains found that for rail users, the following factors can improve the experience of interchanges (in no particular order of importance):

- *ideally having the connecting service leave from the same platform, or having a clear and straightforward route to take through the station to reach the connecting service*
- *having access to appropriate real-time information about when the connecting service is leaving and where from*
- *having just the right amount of time to make the change – enough to get to the next platform without rushing, but not having to wait for more than 20 minutes*
- *having staff available to give directions, provide information and reassurance, and increase feelings of personal security at the station*
- *good station facilities such as toilets, seating, covered areas which provide warmth and shelter, and a place to buy food and hot drinks.*

[11] Transport Focus (2022) Changing trains versus direct trains: Passenger views.

3.4 The Importance of Rail

Rail can provide communities with connections to economic, leisure, and social opportunities, to name just a few. Figure 16 shows how important respondents feel that rail is to their community. 87% thought rail was important to some degree to their community. This includes 44% of all respondents who said it is very important, 30% who said it is important, and 13% who said it is somewhat important. Only 6% said that rail was not important to the community, and 7% said that they did not know how important it is.

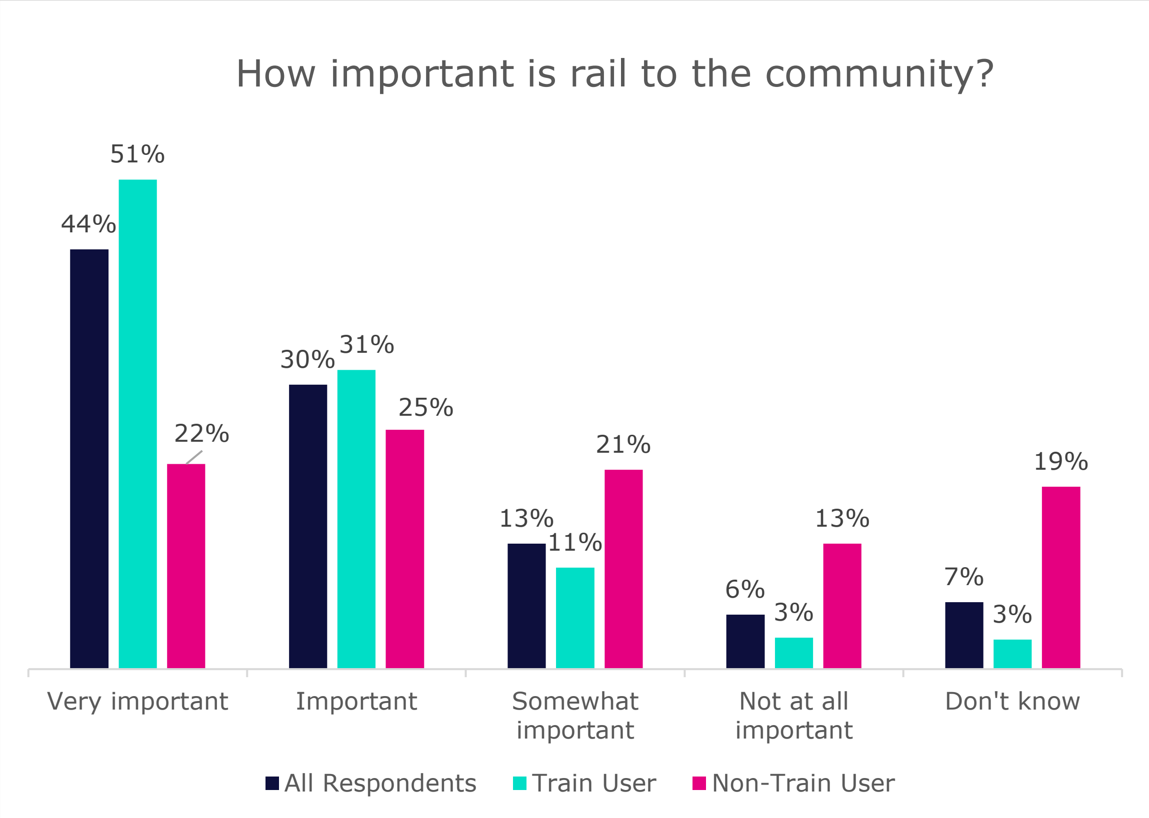

Figure 16: How important is a rail service for your community? Excludes not applicable. All Respondents N.: 682. Train User Respondents N.: 515. Non-Train user respondents N.: 167.

Figure 16 also shows that there are differences in opinions between the respondents who are train users and those who are not. Train users were much more likely to think that rail is at least somewhat important to their community than non-train users, and they were particularly more likely to think rail was very important than non-train users.

As follows, non-train users were more likely to say rail was not important than train users, and they were also much more likely not to know how important rail is to their community, with 19% selecting this option. Despite this, non-train users were more likely to say rail is important to some degree than not, with 68% of this group seeing it as important to some degree.

Respondents thought rail was important to the community for a range of reasons. Many said that lots of people in the community use the rail service and that it provides connectivity for commuting, leisure, social and tourism journeys. Some highlighted how it provided important additional travel options, particularly for regional journeys and in some rural communities. Another key area respondents mentioned was that they liked using the train, that it could be a fun and stress-free option, and that it meant they didn't have to drive, which links to further comments around the environmental benefits of rail and its role in reducing carbon emissions. Finally, a few mentioned the role of rail in economic growth and providing economic opportunities for people.

The quotes below highlight some comments made by respondents about why rail is important to their community.

"In a fairly isolated rural community with many elderly people, it is vital to have reliable regular public transport. ... The rail service only serves a small number of places locally so it is never straightforward to get to where you want to go. What public transport we do have is absolutely vital but we absolutely need it to be better."

- Train User Respondent Aged 45-59 from Cumbria

"For non-drivers train travel is an essential option. It is also a greener option as the roads are so overcrowded with too many cars already"

- Train User Respondent Aged 60-64 from Cumbria

"Many people in my area, including family, use and rely on it for travel to work and other purposes"

- Non-Train User Respondent Aged 65-74 from West Yorkshire

Appendices

Appendix A – Respondent Demographics

This Appendix provides a breakdown of respondent demographics and how this compares to the actual Northern population based on the 2021 Census data. The comparisons show that the respondent group is broadly reflective of the Northern population based on the demographic variables included in the survey, except for a few notable differences.

Please note the information in the Introduction to this report regarding the quotas set for completed responses by train use frequency.

The implementation of the above-mentioned quotas means that those who use rail at least once a year are somewhat over-represented within this survey compared to the wider population.

Figure 17 shows the comparison of the age profile between the survey respondents and the population of the North. While there are some discrepancies, the survey respondent age profile does reflect a somewhat similar spread. It is worth noting that the survey respondent age profile overrepresents those in the 60-64 and 65-74 age brackets, and underrepresents younger age groups.

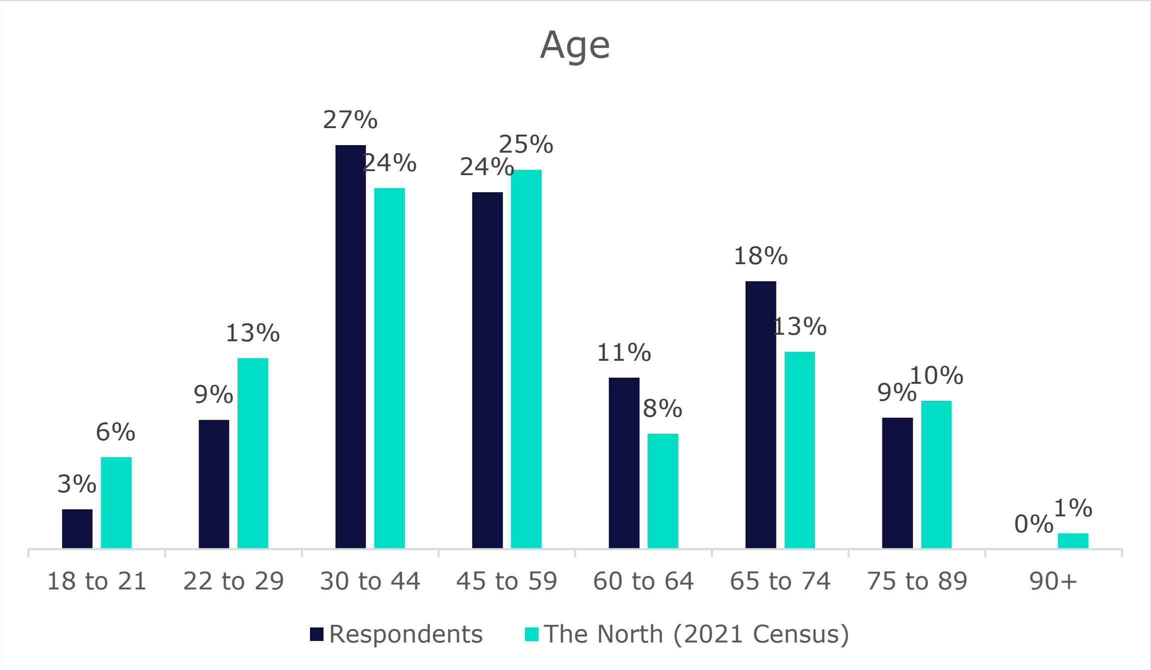

Figure 17: Please confirm the relevant age bracket for you. Excludes ‘prefer not to say’. Respondents N: 639. The North figure is from the 2021 Census, TS007 Age by single year, using regional data for North East, North West, Yorkshire and the Humber

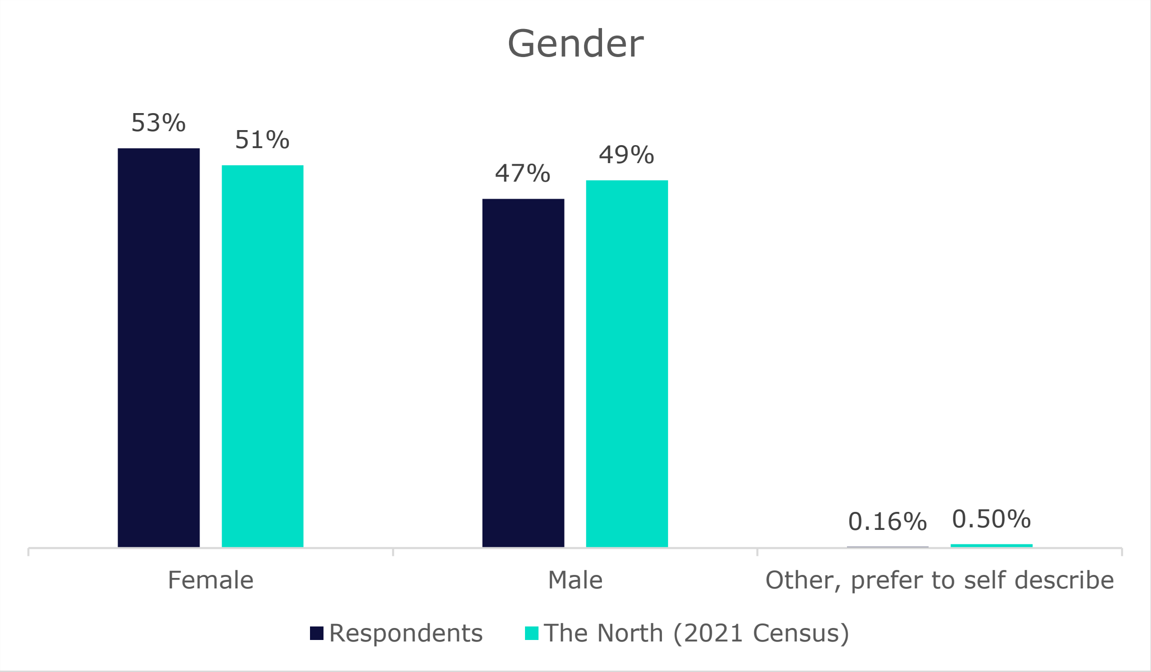

Figure 18: Which of the following do you identify as? Excludes 'prefer not to say' Respondents n.: 638. Results for the North are from the 2021 Census TS008 Sex, using regional data for North East, North West, Yorkshire and the Humber.

Figure 18 shows that the gender split of survey respondents is similar to that in the North, albeit with a very small overrepresentation of females.

On ethnicity, Figure 19 shows that there is a similar proportion of white survey respondents to the Northern population. However, there are some differences in other ethnic groups, particularly Asian groups, which are underrepresented among the survey respondents.

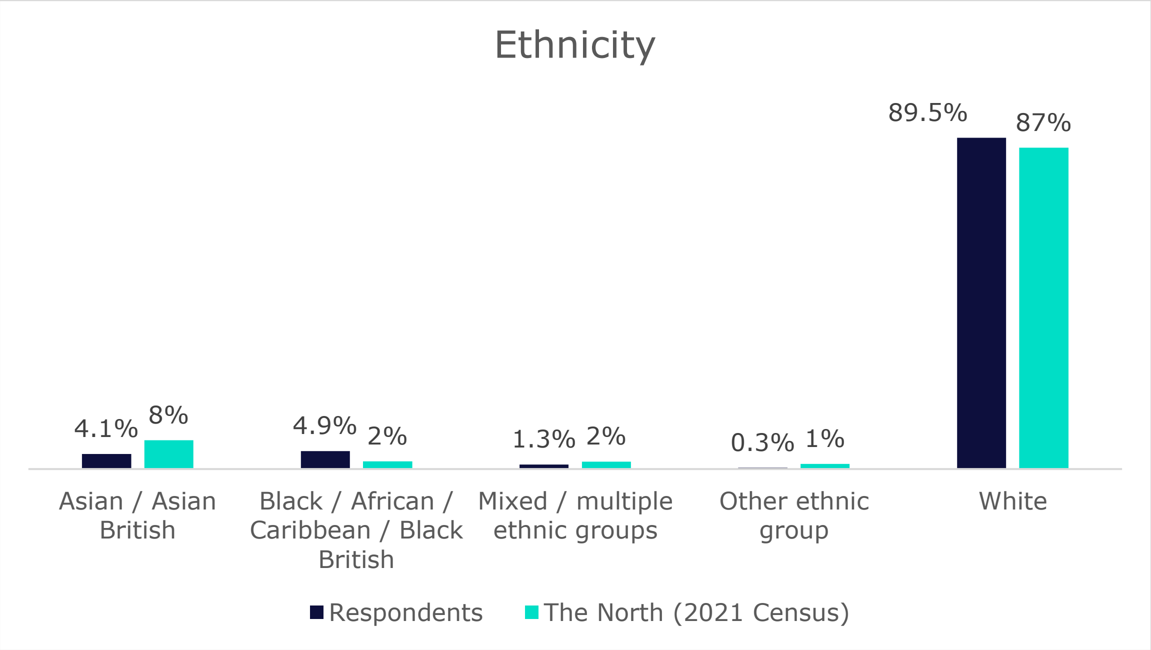

Figure 19: Please choose an option below that best describes your ethnicity. Excludes 'Prefer not to say'. Respondents N : 637. The North figure is from the 2021 Census, TS021 Ethnic Group, using regional data for North East, North West, Yorkshire and the Humber

Figure 20 shows the proportions of those with physical or mental health conditions or illnesses lasting or expected to last for 12 months or more. The figures show that the survey respondents' profile slightly overrepresents those with a long-term health condition by around 5%.

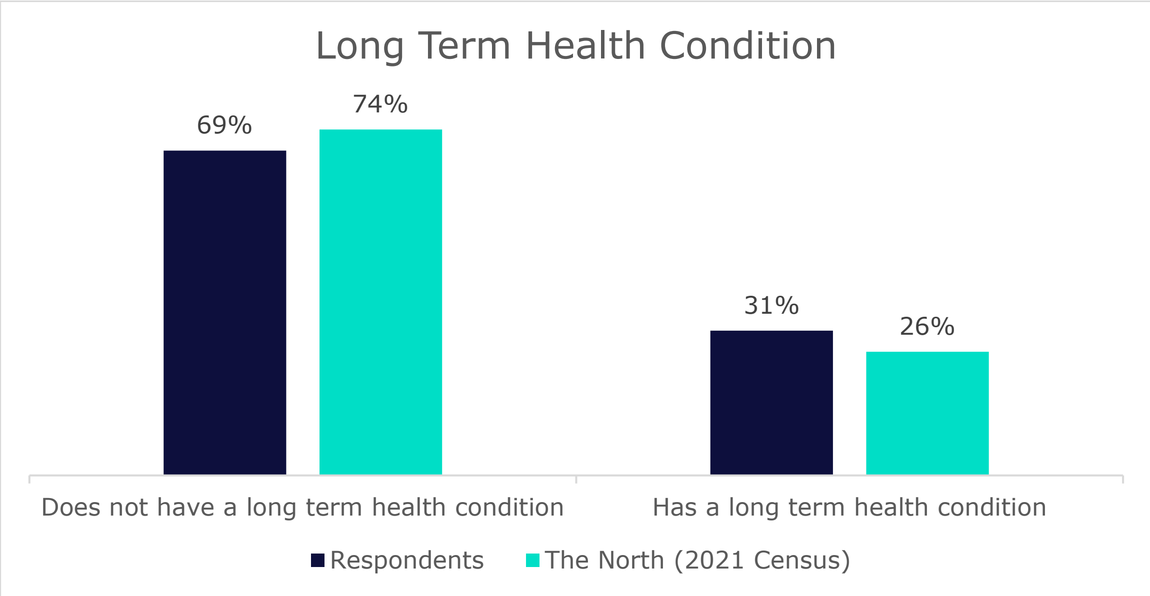

Figure 20: Do you have any physical or mental health conditions or illnesses lasting or expected to last for 12 months or more? Excludes 'Prefer not to say'. Respondents N: 633. The North figure is from the 2021 Census, TS038 Disability, using regional data for North East, North West, Yorkshire and the Humber

A comparison of survey respondents and Northern population by region can be seen in Figure 21. The figure shows that the survey respondent profile reflects well the population split across the Northern regions.

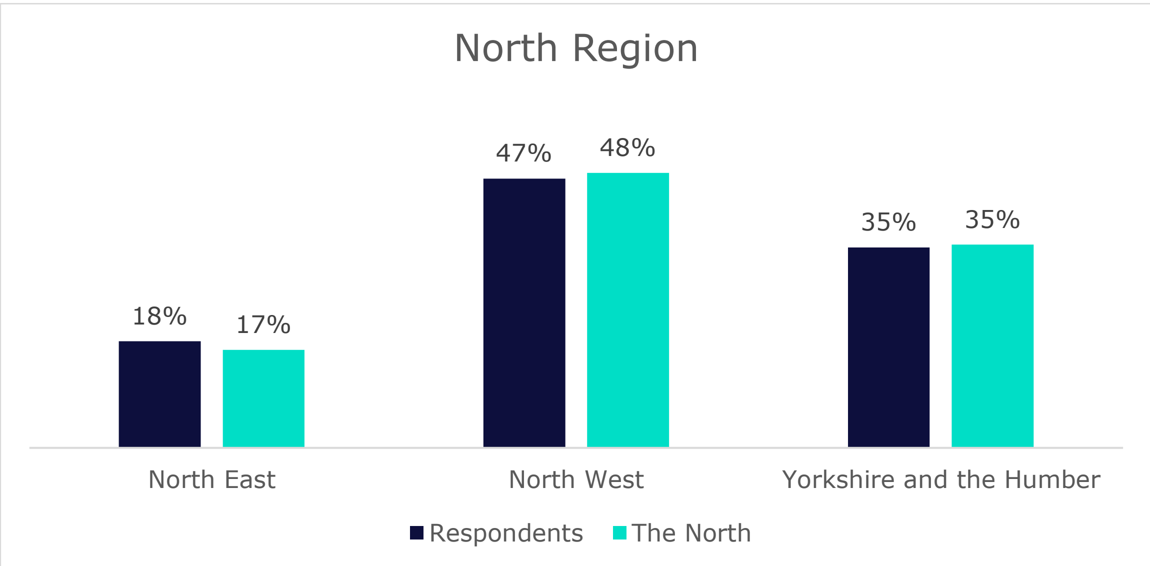

Figure 21: Which of the following northern regions do you live in? Excludes 'I do not live in the north'. Respondents N: 633. The North figure is from the 2021 Census using regional data for North East, North West, Yorkshire and the Humber

Appendix B – Primary Stations

As part of the survey, train users were asked to provide the rail station in the North of England from which they begin most of their rail journeys. Of the 520 train user respondents, all selected a station. There were 203 unique stations selected, with most stations only being selected by one or a small number of respondents.

Table 3 below shows the top 20 most selected stations by train user respondents. As expected, some of the regions' larger stations are towards the top of the table, including Newcastle, Manchester Piccadilly and Sheffield.

Station Name	Number of respondents
Newcastle	37
Manchester Piccadilly	28
Sheffield	20
Doncaster	17
Leeds	16
Liverpool Lime Street	14
York	12
Preston (Lancs)	10
Bolton	9
Manchester Victoria	9
Darlington	8
Hull	8
Accrington	7
Durham	7
Blackpool North	6
Huddersfield	6
Ashton-Under-Lyne	5
Birkdale	5
Middlesbrough	5
Wakefield Westgate	5

Table 3: Please select the rail station in the North of England where you begin most of your rail journeys. Only train user respondents. Respondents N.: 520

Reference List

Transport Focus (Spring 2020) National Rail Passenger Survey – Main Report

Transport Focus & Network Rail (2022) Britain's Railway: What Matters to Passengers – Summary Report

Quadrangle for Transport Focus & GBRTT (2022) Potential rail industry initiatives: Passenger satisfaction analysis.

Transport Focus & Network Rail (2022) Changing trains versus direct trains: Passenger views - Summary Report

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Transport Focus (2024) Motivations and barriers to train usage.

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