

InfoTracker Survey

Q3 2023-24 (Oct-Dec 23)

Rail Delivery Group



Content

Background and methodology	3
Summary	4
Overall satisfaction	5
Key performance indicators	9
Stages of the journey	20
Experience with disruptions	62
Appendix	76
Contact	83

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 3 2023/2024 among n=2,570 respondents.

The fieldwork was conducted from 1st October to 31st December 2023.

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

*Strikes continued throughout this period.



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 Q1 2022/23, while **+/- in green** refers to a significant increase compared to Q1 2022/23.

Summary

Overall satisfaction and rating

Overall satisfaction with information provision remains high at 86%, and all passenger types have a better experience this quarter and this is conveyed across the TOCs, and throughout the journey stages at an overall level. This is likely driven by improved ratings in November 2023. The journey to the station has previously been the underperforming stage, however latest figures suggest the experience is improving, and particularly so among those with a disruption – a positive sign that information is being provided in advance of their journey.

When we explore by aspects of information provided, at an overall level this continues to be delivered well and is heading a positive direction even amongst the disrupted.

Nearly 3 in 4 rate the information about their delay as being handled well, albeit this is only 49% among cancelled passengers, showing how different passengers experiences can impact ratings.

Nevertheless, a drop in satisfaction of information provision is apparent in December, where the experience of disrupted and commuting passengers drops. It also coincides with a number of winter storms impacting travel. The drop in satisfaction in December is driven by poorer information provision during a period of heightened disruption, and a greater number of commuters travelling by rail. During this month, the major disrupted had less trust in the information they were given, felt it was not personalised, and at the station and on-board were two key areas where information was poorer in December. Cancelled passengers were also particularly affected.

Information channels used

The National Rail website/app information continues to be the most used source for planning/booking, the journey to the station and after the journey has finished. It is also now equally used as much as automated announcements when at the destination station. For the departure station and on board, screens, station signage and announcements are most important for assisting passengers.

The ratings of the different information channels remain high, and generally correlate with incidence of use. Channel satisfaction does, however, change month-on-month. November was a month where new satisfaction records were reached, which is mirrored by ratings of top used channels at each journey stage. Yet, December saw declines at an overall level, and this is noted in a drop in performance for several of the top used channels. In particular, the announcements, screens and the NR app/website used when at the station, and the latter of the two channels when on-board the train. This is most apparent for those experiencing disruptions.

It's imperative that the information from channels used is tailored towards the end user. The disrupted passenger's experience of the channels can have an impact on satisfaction at a granular level, which can impact perception of the information overall. Therefore, it's important that channels can provide the most appropriate information to meet their needs.

Pledges

During planning and booking, passengers remain very satisfied with the information provided. Information on different aspects of the journey are becoming more widely seen, and with satisfaction with this information remains stable or has improved. People are generally happy with the length of time given regarding changes to train times, and more satisfied when receiving information about facilities at the station and on board, rather than for just one stage. Most passengers are informed about rail replacement buses at the booking stage and was easy to find where the bus replacement was located.

At the station, platform information and staff assistance were rated highly, with the latter continuing to show improvements in the helpfulness of information provided by staff, particularly during a disruption. Announcements are key at this point, though the experience was not the same for all. The major disrupted were more dissatisfied with the timing of announcements, as its crucial for future planning. On board, disrupted train passengers also feel that announcements could be better on timing and length. Its important information is tailored to the situation, such as on disruptions or unexpected delays.

Of those delayed, information was conveyed well. Though on a month-to-month, December conveyed that the experience worsened, particularly for information on compensation. Despite all of this, passengers continue to seek more frequent updates, which aligns with earlier dissatisfaction regarding timely announcements during a disruption.



Overall satisfaction

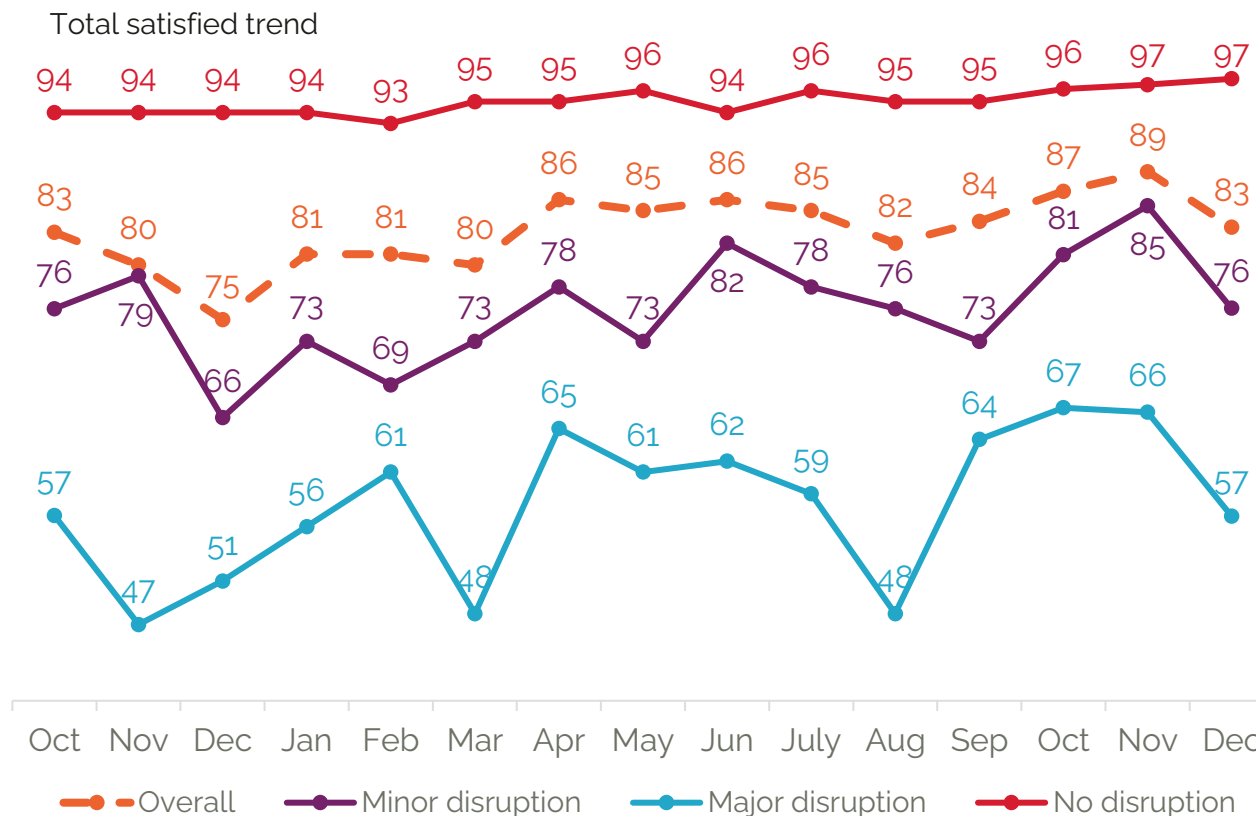
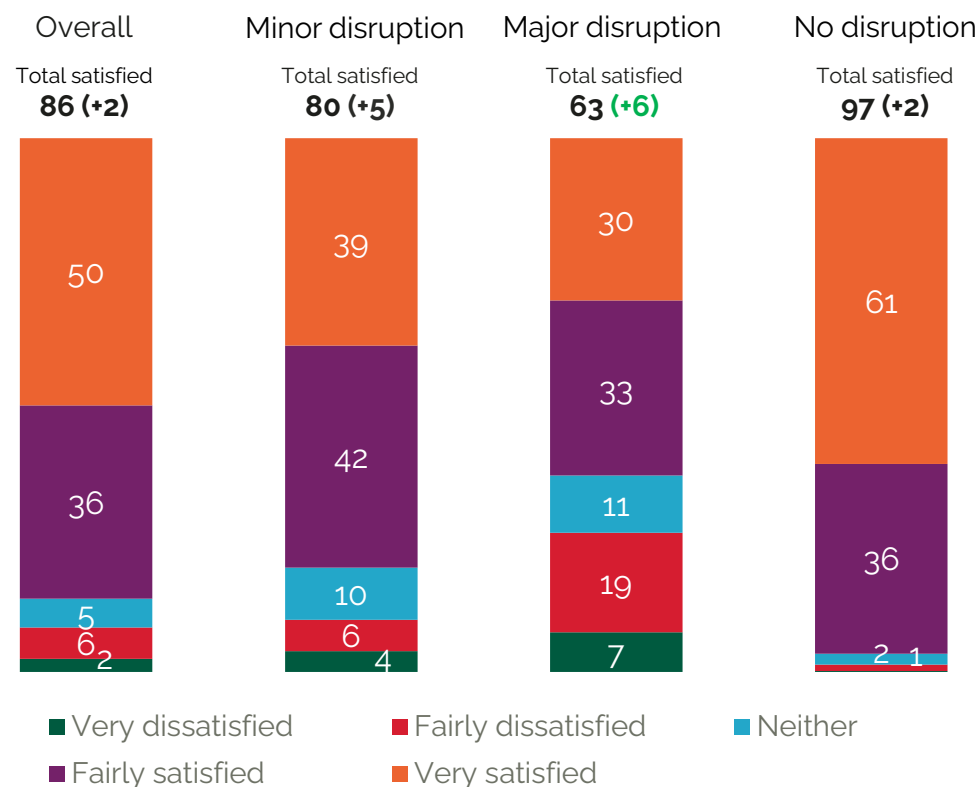
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Overall satisfaction with information provision (1/3)

Overall, passengers' satisfaction with information provision (% very + fairly satisfied) has increased in October – December 2023. This was mostly driven by a significant uplift in satisfaction amongst major disrupted, after information provision dramatically improved since the drop in August 2023. December sees a drop in the experience of the disrupted, coinciding with a greater proportion of disruptions during this month, and several winter storms impacting travel.

Overall satisfaction with information provision by disruption (%)

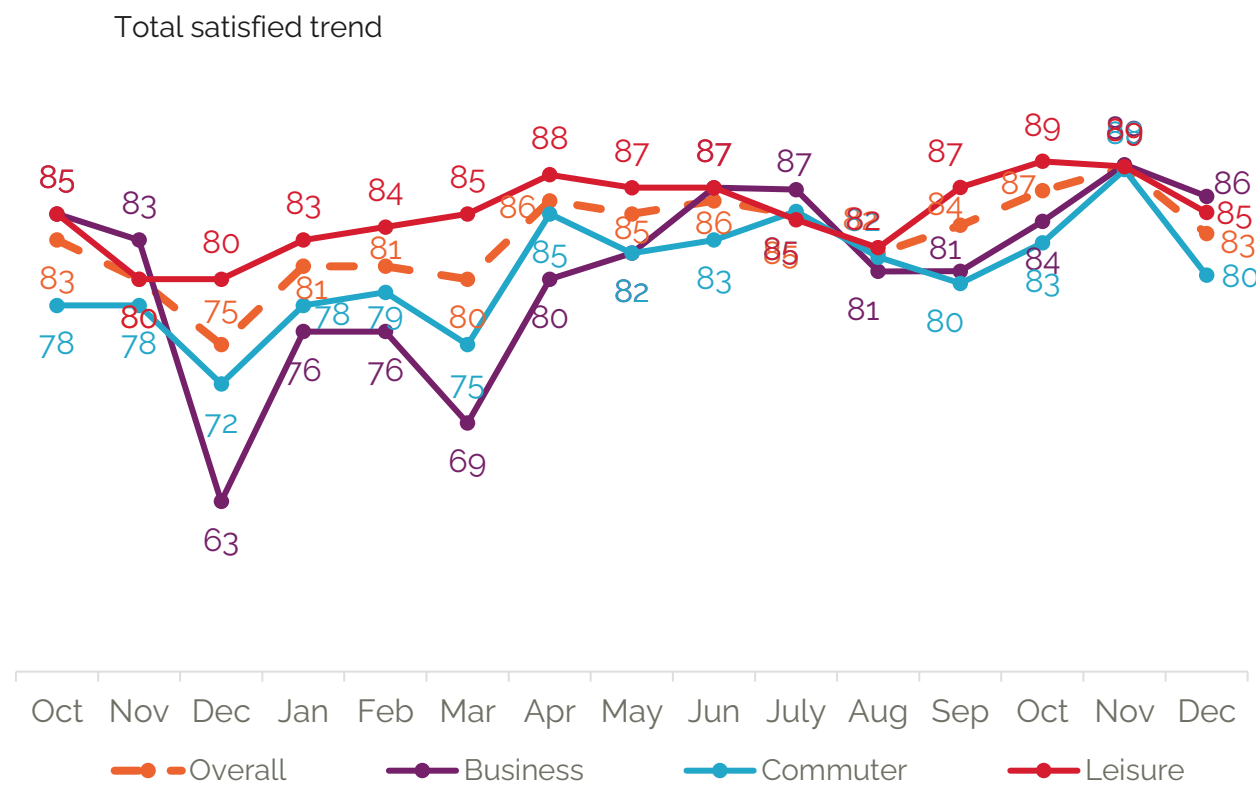
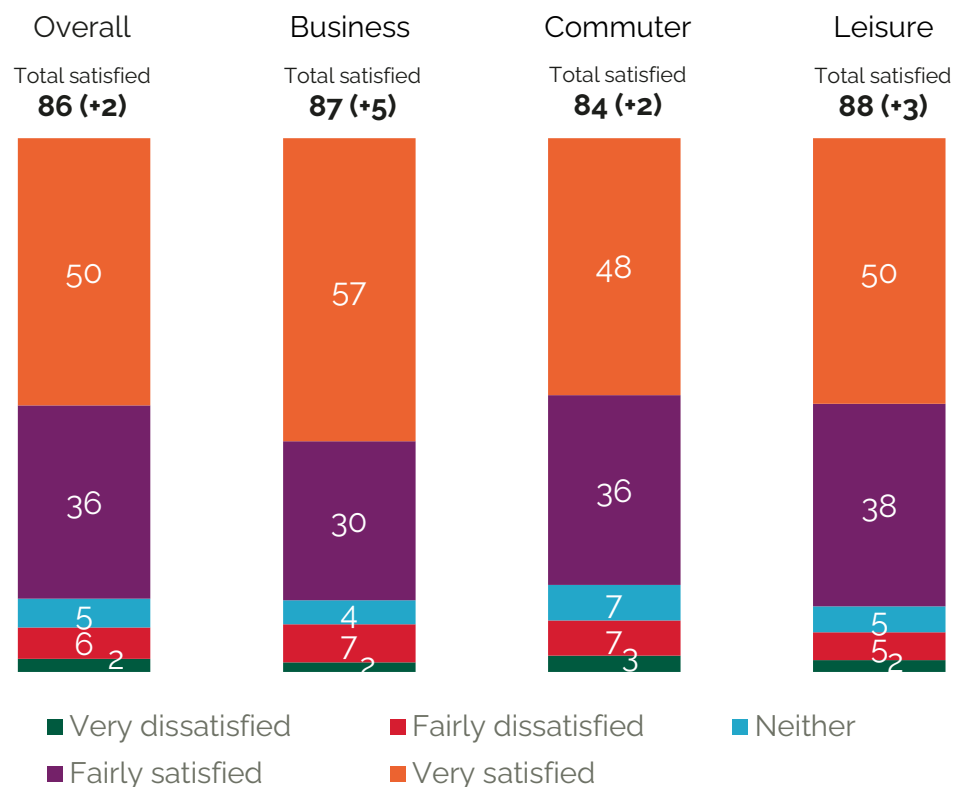


Overall, how satisfied were you with the information provided during your journey? (excl DK) Oct-Dec 23 (2552/480/551/1521); Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/June/July/Aug/Sept/Oct/Nov/Dec 23 – Overall (834/870/849/731/891/811/786/1037/854/858/847/851/848/853) Disruption type: Major (210/202/264/216/172/209/166/148/220/183/179/178/187/169.195), Minor (142/144/169/143/125/155/126/150/170/140/185/169/158/144/178), None (500/488/437/490/434/527/519/488/647/531/494/500/506/535/480)

Overall satisfaction with information provision (2/3)

During October-December, all passenger types experienced a slight increase in satisfaction with the information provision, this is particularly true amongst Business passengers reaching a similar level of satisfaction as Leisure passengers, who usually tend to be more positive than others.

Overall satisfaction with information provision by passenger type (%)



Overall, how satisfied were you with the information provided during your journey? (excl DK) Oct-Dec 23 (2552/327/801/1424) Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/June/July/Aug/Sept/Oct/Nov/Dec 23 – Overall (834/870/849/731/891/811/786/1037/854/858/847/851/848/853) Passenger type: Business (88/82/92/113/89/83/102/91/102/83/98/74/103/110/114), Commuter (320/275/287/275/251/269/259/244/314/247/280/256/229/273/299), Leisure (444/477/491/461/391/539/450/451/621/524/480/517/519/465/440)



Key performance indicators

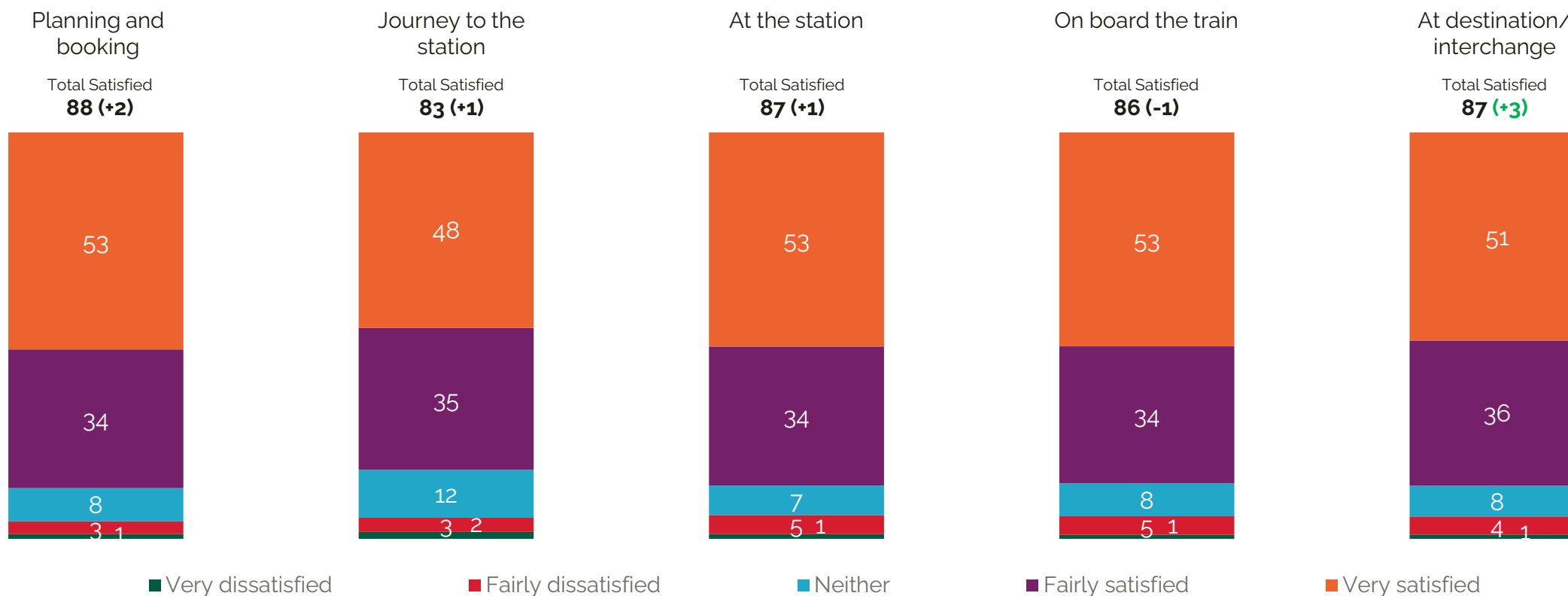
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Overall satisfaction with information provision at each journey stage (1/4)

Overall, passengers are satisfied with the information they receive at different stages throughout their rail journeys. 'At destination/interchange' has improved, while the others remained fairly stable since last quarter. 'Journey to the station' continues to score the lowest.

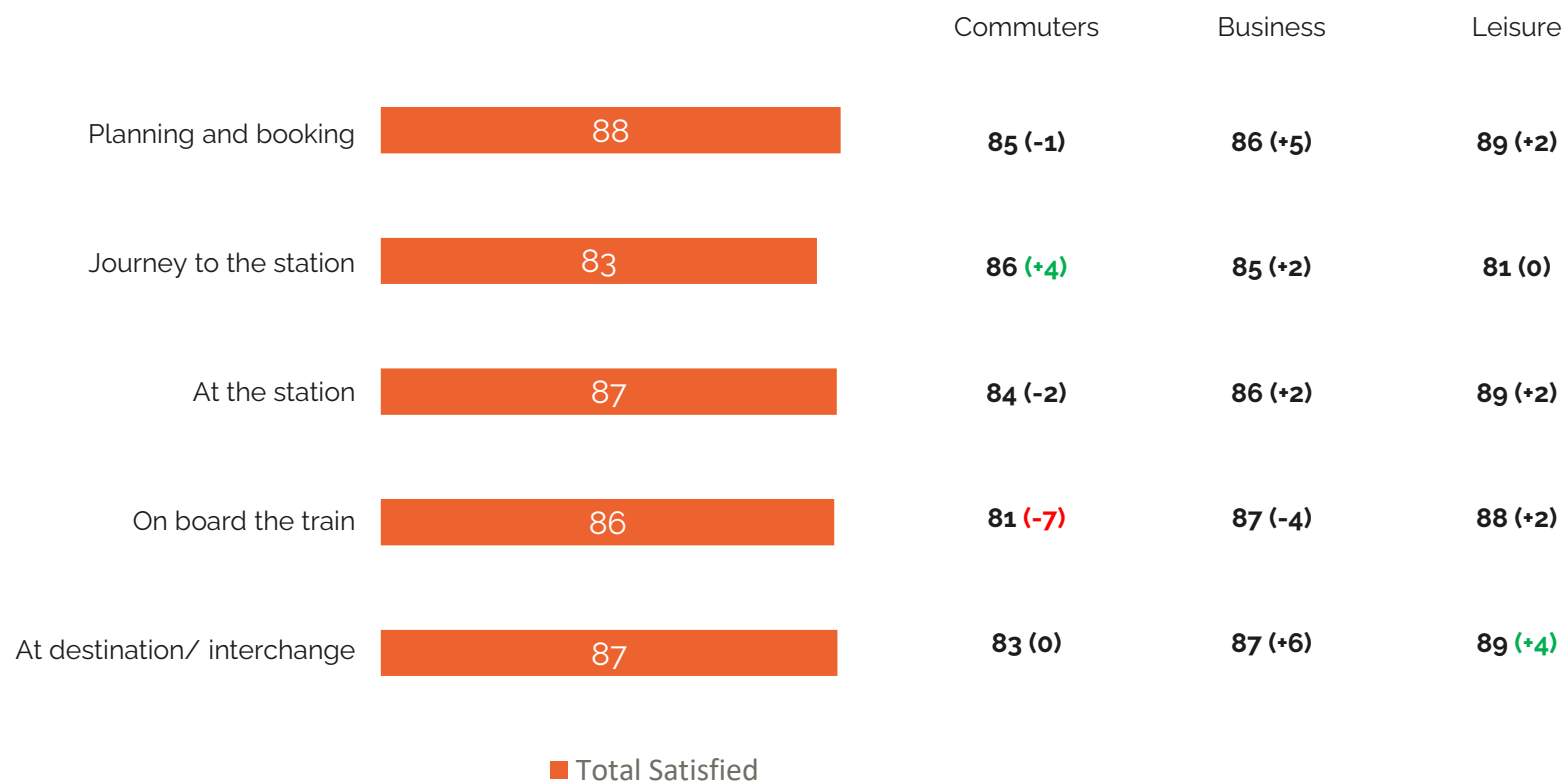
Overall satisfaction with information provided at each journey stage (%)



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

When looking at this by passenger type, commuters experienced significant satisfaction improvement in the information provided on the way to the station, and less so on board the train. On the other hand, leisure travellers were more likely to rate their experience at the destination/interchange higher than in the previous quarter.

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

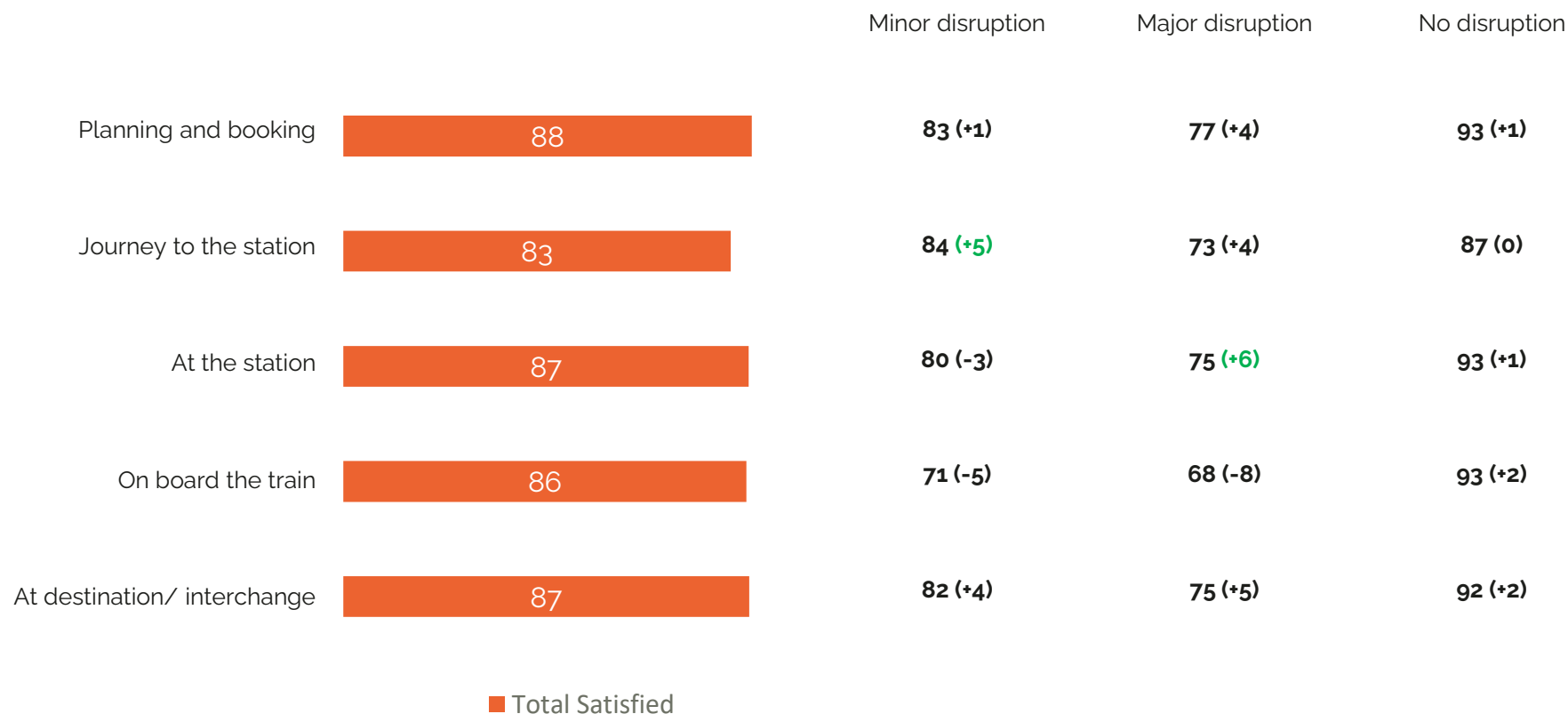


How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Oct-Dec 23 (Overall/Commuters/Business/Leisure) – planning and booking (2480/784/321/1375), journey to station (2254/758/304/1192), at the station (2458/772/318/1368), onboard the train (1780/432/174/1174), at destination/interchange (2274/737/301/1236).

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

Though a journey point with the lowest satisfaction rating of the 5 stages, improvements in satisfaction among the disrupted for information on the way to the station is a positive sign that information provision at this point is heading in the right direction. Information has also improved when at the station for those with a major disruption, which is important for these passengers to decide on what to do next with their journey.

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

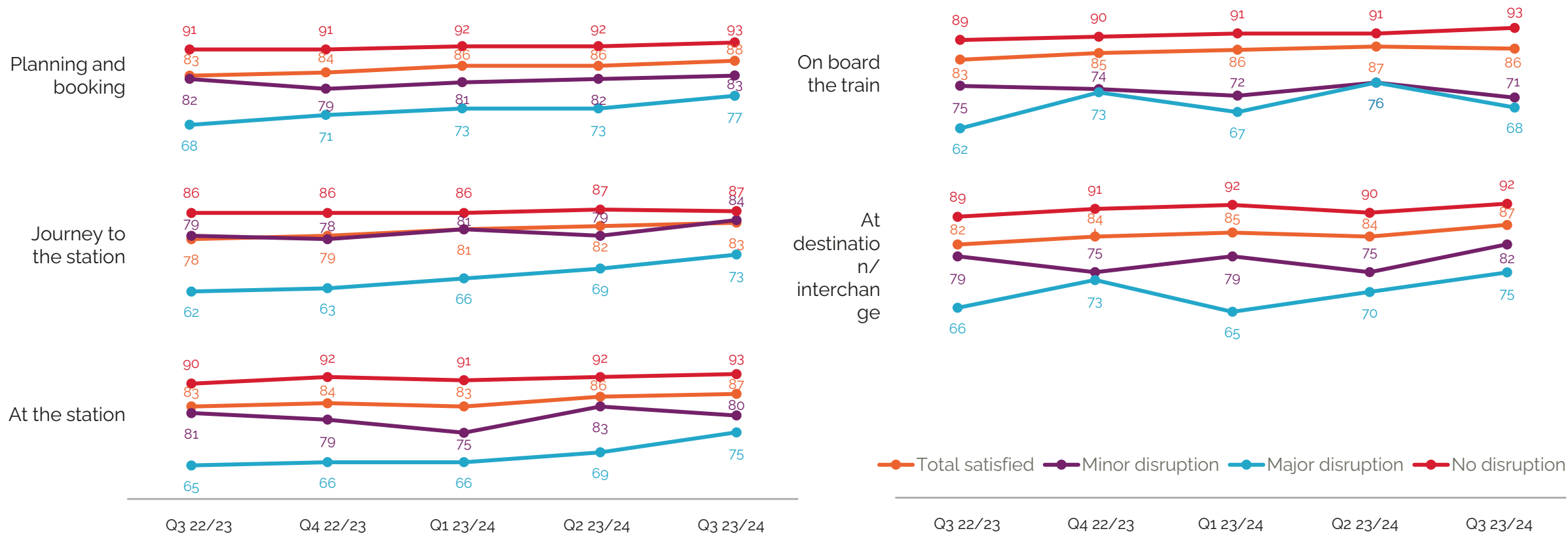


How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Oct-Dec 23 (Overall/Minor/Major/No disruption) – planning and booking (2480/476/539/1465), journey to station (2254/460/493/1301), at the station (2458/481/478/1499), onboard the train (1780/267/215/1298), at destination/interchange (2274/470/405/1399)

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

Satisfaction amongst the non-disrupted remains high and shows some improvement from previous quarter. The major disrupted showed strong improvements in satisfaction stages, however satisfaction on board the train has declined. Similarly, the minor disrupted showed a decline in satisfaction 'on board the train', and 'at the station'.

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

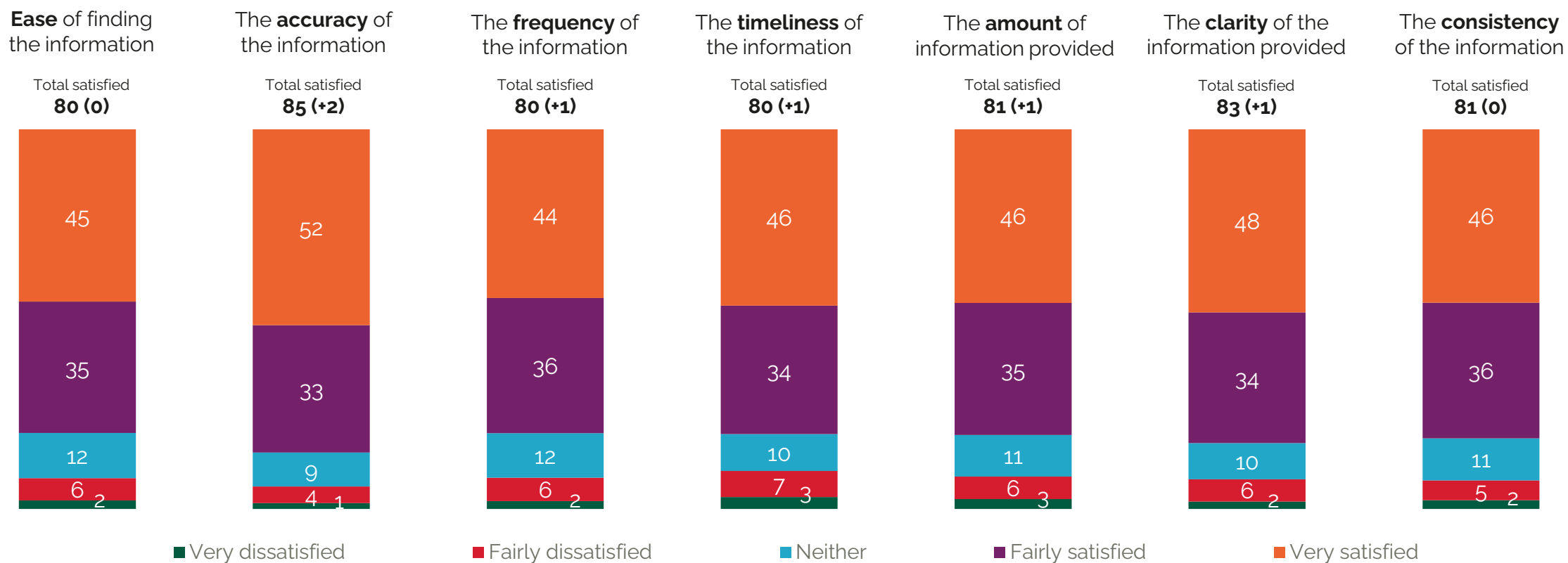


Overall, how satisfied were you with the information provided...? (excl DK) Aug-Sept 22/Oct-Dec 22/Jan-Mar 23/Apr-Jun 23/Jul-Sept 23/Oct-Dec 23- planning (2498/2496/2410/2555/2457/2480), journey to station (2254/2304/2189/2377/2225/2254), at the station (2407/2425/2335/2522/2426/2458), onboard the train (1801/1812/1820/1952/1873/1780), at destination/interchange (2221/2236/2192/2351/2264/2274).

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

Satisfaction remains high and in line with the previous quarter for all aspects of information provided.

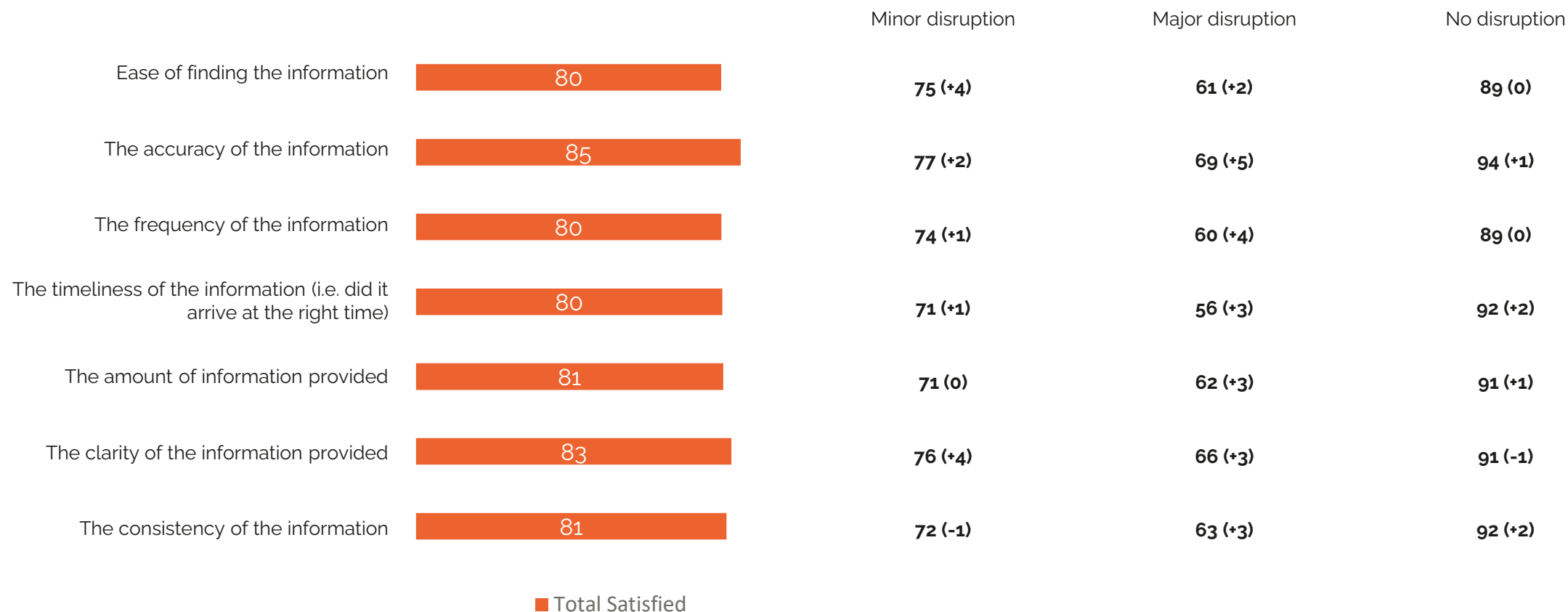
Overall satisfaction with aspect of information provided during the journey (%)



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

Passengers feel satisfied with the aspects of information provided during their journey. Those who were disrupted show lower scores, especially amongst the major disrupted, however satisfaction has slightly improved across all aspects since last quarter.

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

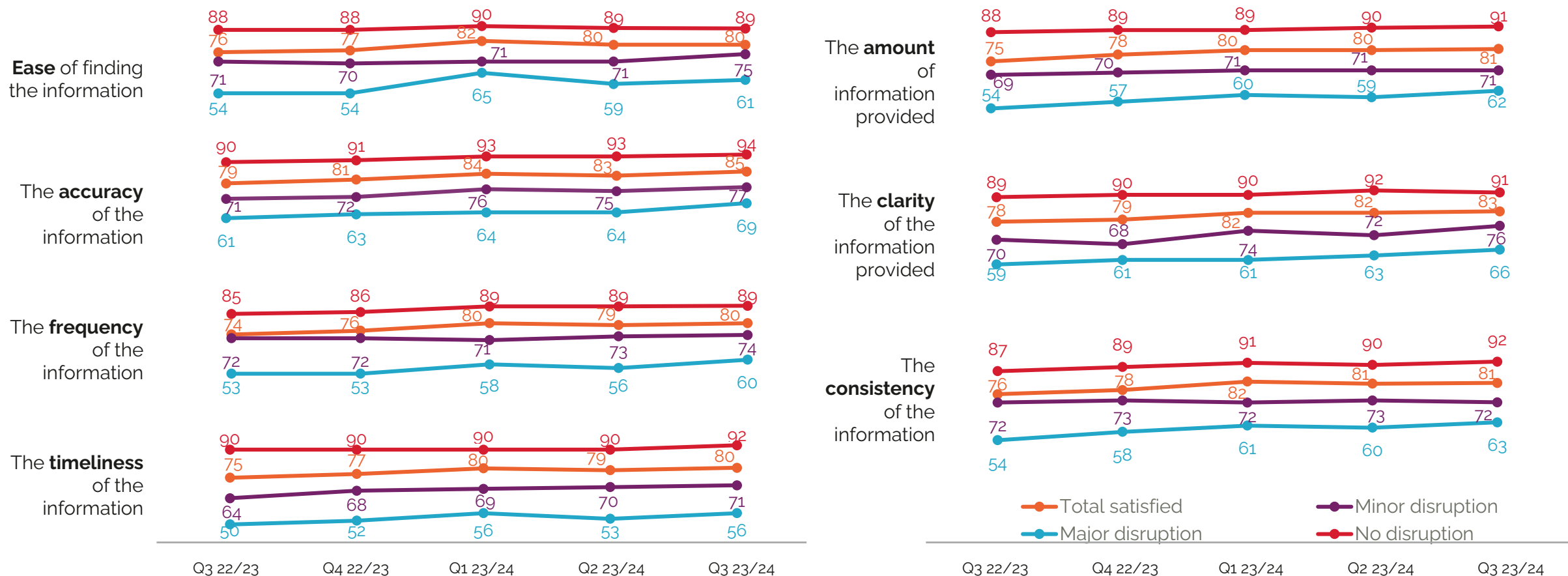


How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Oct-Dec 23 (Overall/Minor/Major/No disruption) – ease (2538/368/323/1346), accuracy (2552/384/374/1431), frequency (2545/361/329/1363), timeliness (2555/347/300/1415), amount (2556/354/332/1388), clarity (2551/379/352/1399), consistency (2541/355/341/1383).

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

At an overall level, satisfaction has remained quite stable across all the aspects of information provided, with the major disrupted showing a slight uplift since the previous quarter.

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

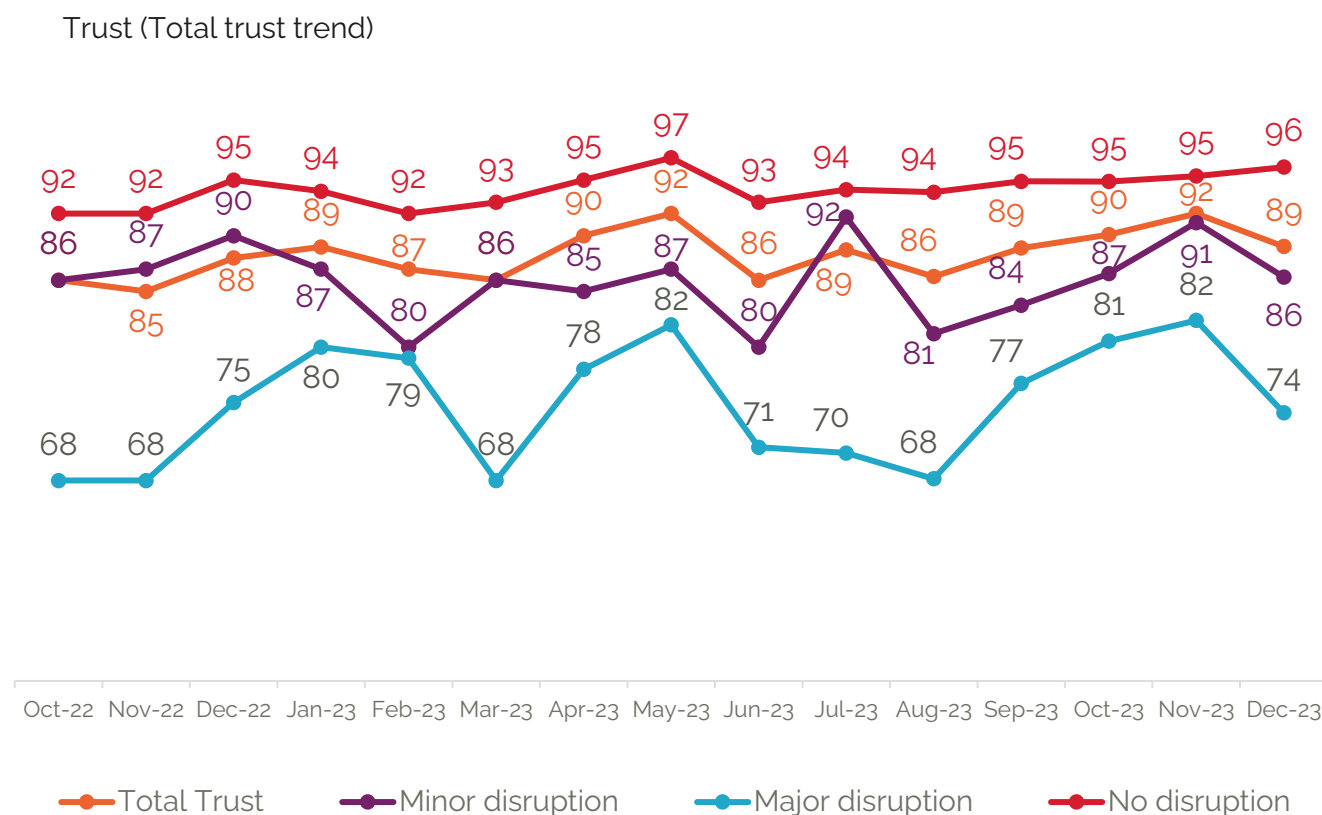
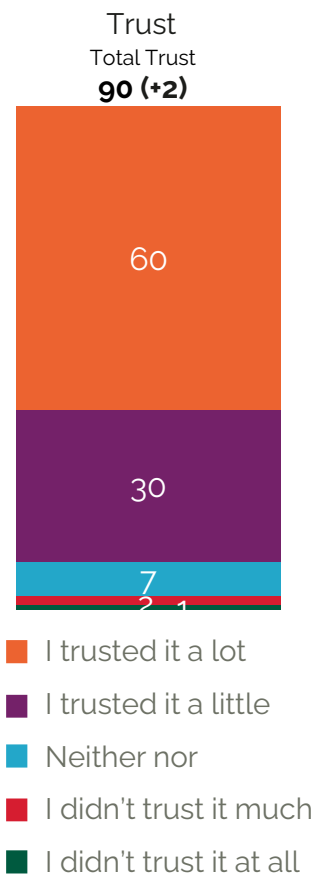


How satisfied were you with the following aspects of the information provided during your journey? (excl DK) Aug-Sept 22/Oct-Dec 22/Jan-Mar 23/Apr-Jun 23/Jul-Sept 23/Oct-Dec 23-ease (2350/25412/468/2622/2539/2538), accuracy (2543/2542/2475/2623/2548/2552), frequency (2542/2543/2469/2622/2543/2545), timeliness (2543/2551/2475/2622/2551/2555), amount (2544/2553/2478/2623/2556/2556), clarity (2536/2548/2470/2627/2554/2551), consistency (2541/2540/2476/2622/2546/2541)

Rating of trustworthiness of information provided

The trust level of the information given to rail passengers was high, with 9 out of 10 expressing confidence in the information they received. However, the trust level was found to be more variable among those who experienced disruptions during their journey, with levels dropping particularly during December. On the other hand, at overall level, those who were disrupted showed an uplift in trust since last quarter, especially amongst the major disrupted.

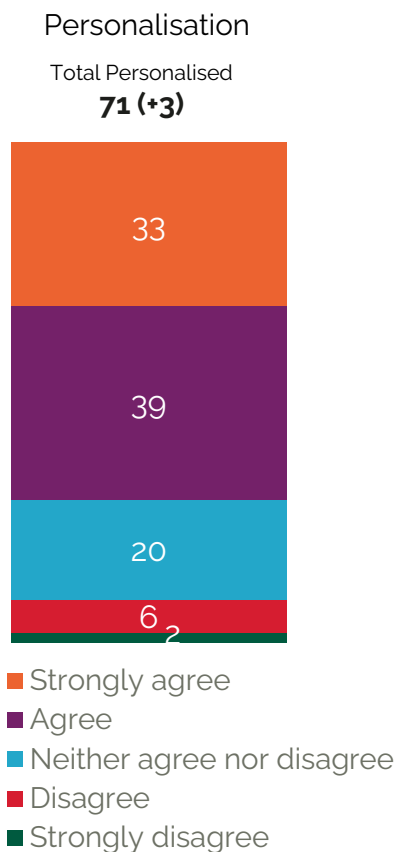
Overall rating of trustworthiness of information provided by disruption (%)



Rating personalisation of the information provided

Overall, 7 in 10 passengers think the information was personalised to them and their journey. This quarter, ratings among those who were disrupted has seen a positive increase, especially amongst the major disrupted.

Overall rating of personalisation of information provided (%)

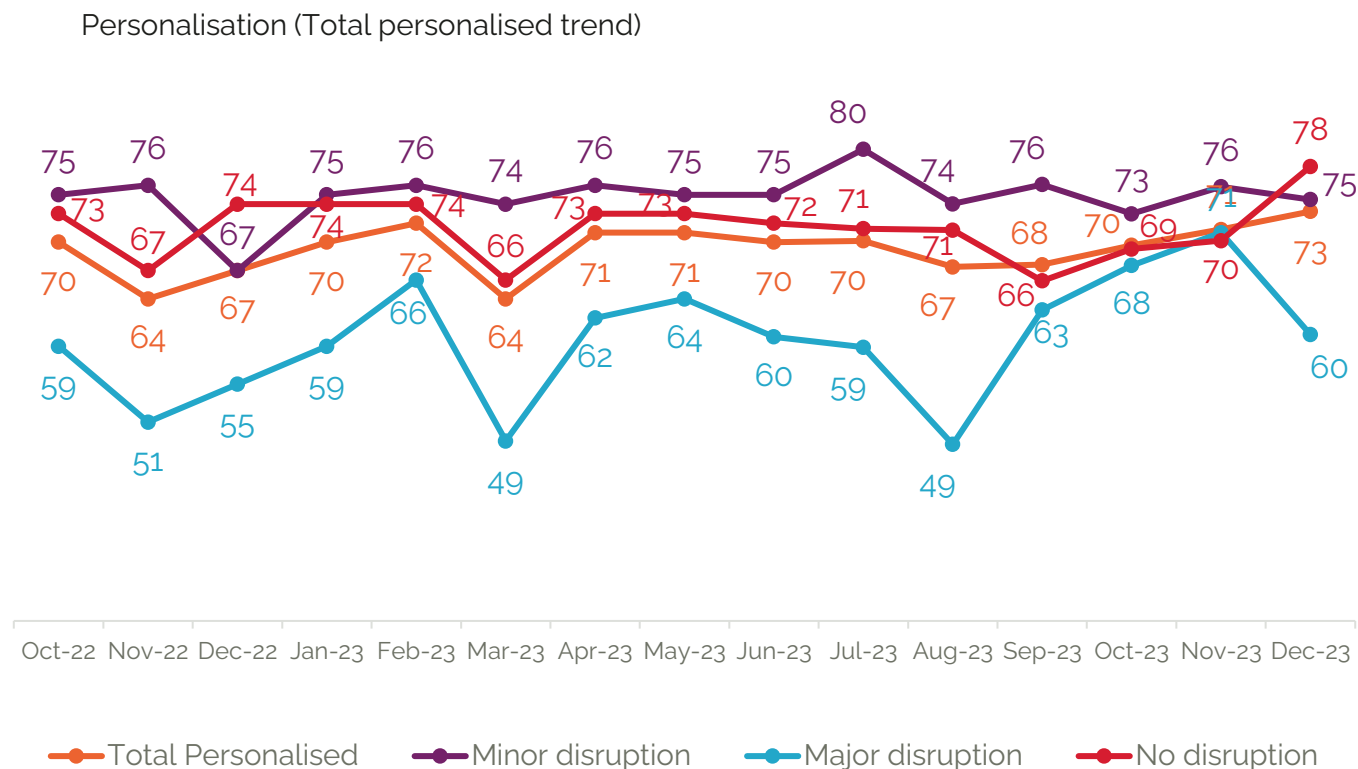


Overall
Total Personalised **71 (+3)**

Minor disruption
Total Personalised **74 (-2)**

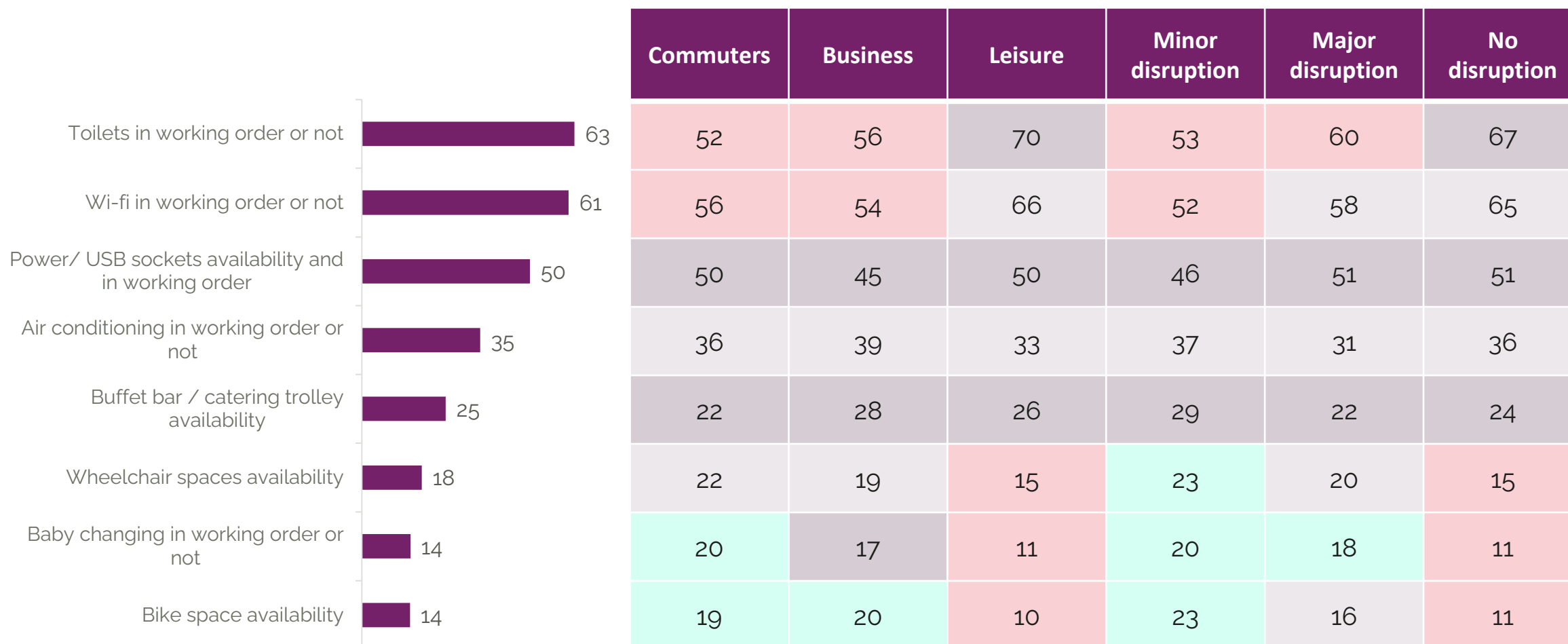
Major disruption
Total Personalised **66 (+9)**

No disruption
Total Personalised **72 (+2)**



Useful real-time information required by passengers

Passengers who are travelling without any disruptions and those on leisure trips find it most beneficial to receive real-time updates if the wi-fi or toilets are in working order or not. Those who were somewhat disrupted are more likely than others to prefer information on wheelchair spaces availability, if baby changing are in working order and bike space availability.





Planning and booking

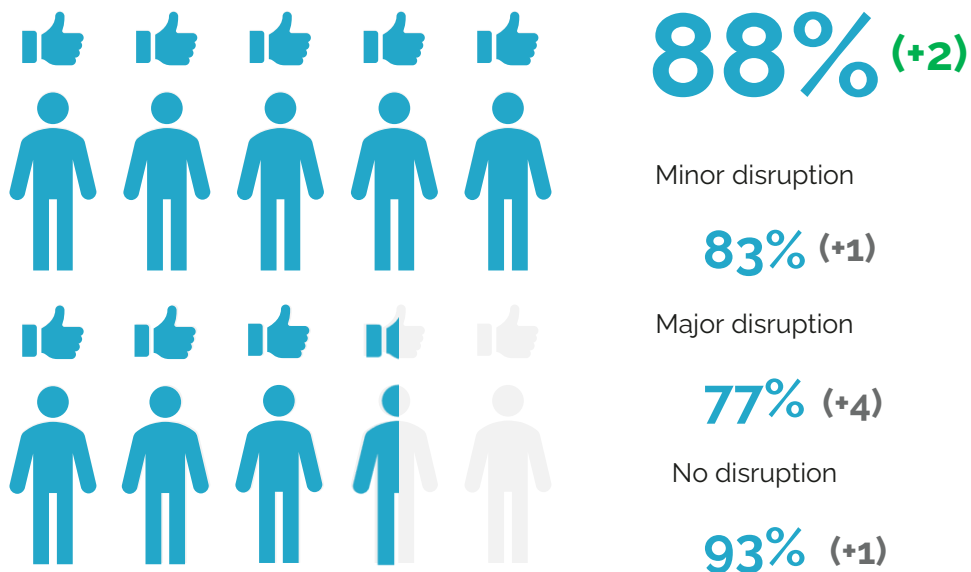
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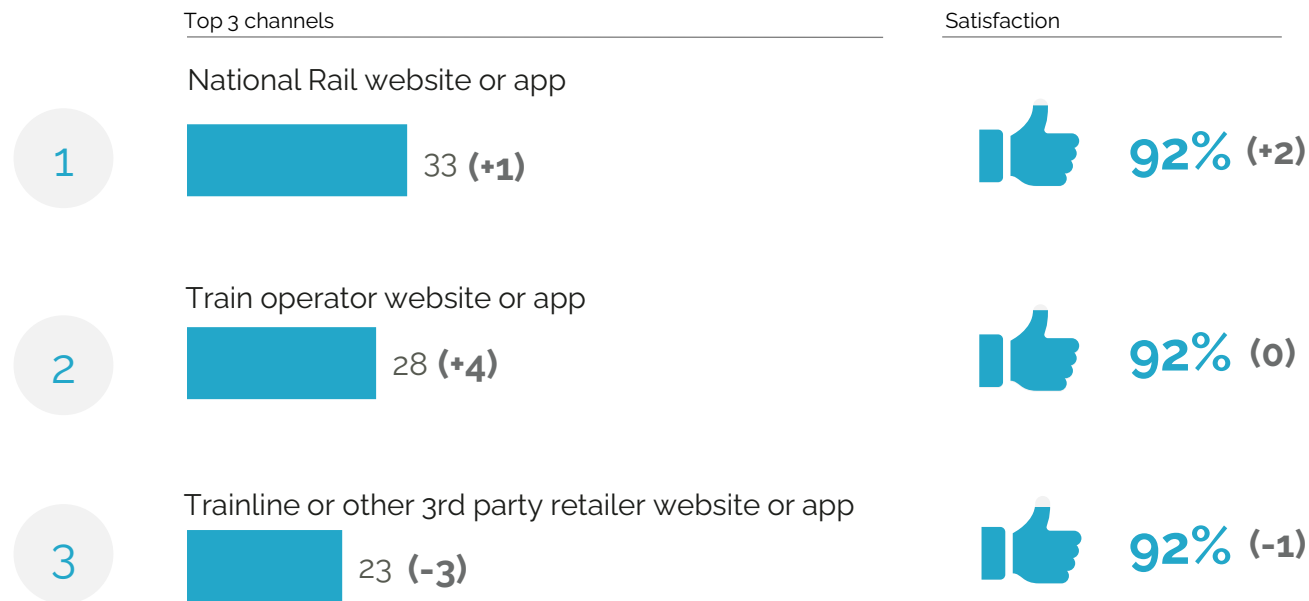
Planning and booking – Key satisfaction metrics

Rail passengers planning and booking their journeys continue to be very satisfied with the information provided (88%) at that stage. The top channel used remains National Rail website or app (33%), second is the train operator website or app (28%), then Trainline or other 3rd party retailer website or app (23%). All three channels received high satisfaction ratings of 92% respectively.

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



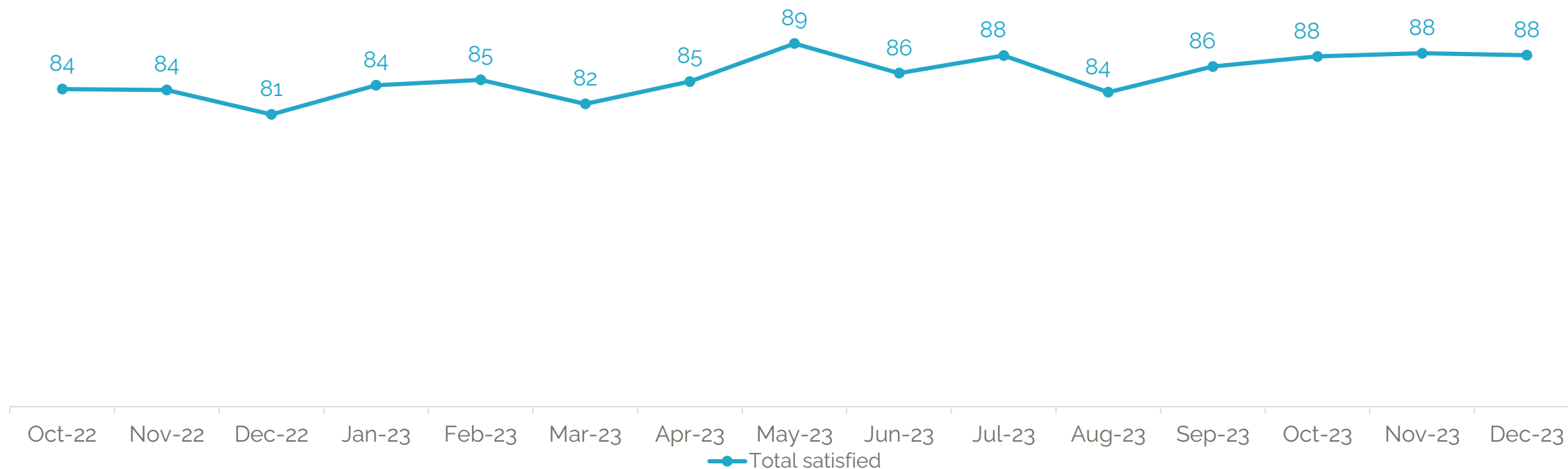
Top 3 channels used during planning and booking and their satisfaction (%):



Overall satisfaction with information provided when planning and booking

Satisfaction with information provided at the planning and booking stage has remained very high and consistent across the last quarter. This is a strong improvement following a decline in satisfaction in August 2023 and positive story considering the Christmas travel period, and several storms impacting travel on certain lines.

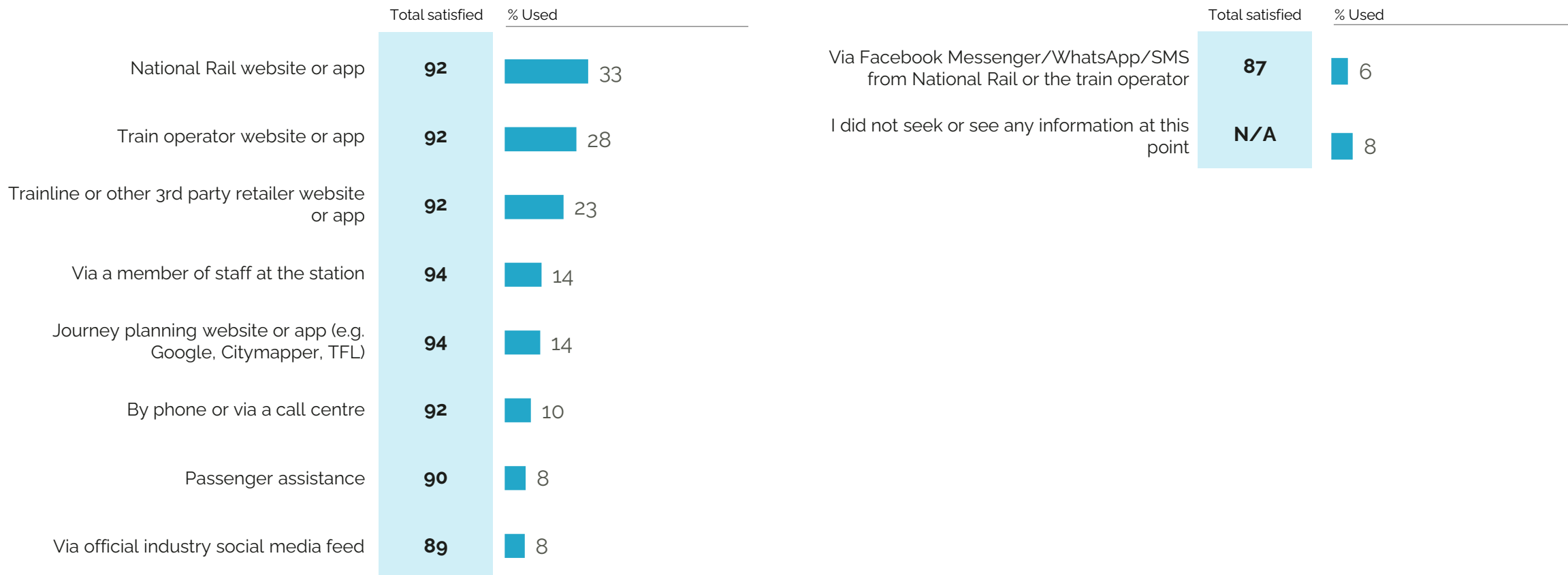
Overall satisfaction with information provided when planning and booking – trended (%)



Information channels used and their satisfaction

The satisfaction of the information channels when planning and booking journeys received high satisfaction ratings across the board. There is also a positive story among those used less so by everyone, such as via a social media feed, which has improved on ratings since last quarter (from 82% to 89%).

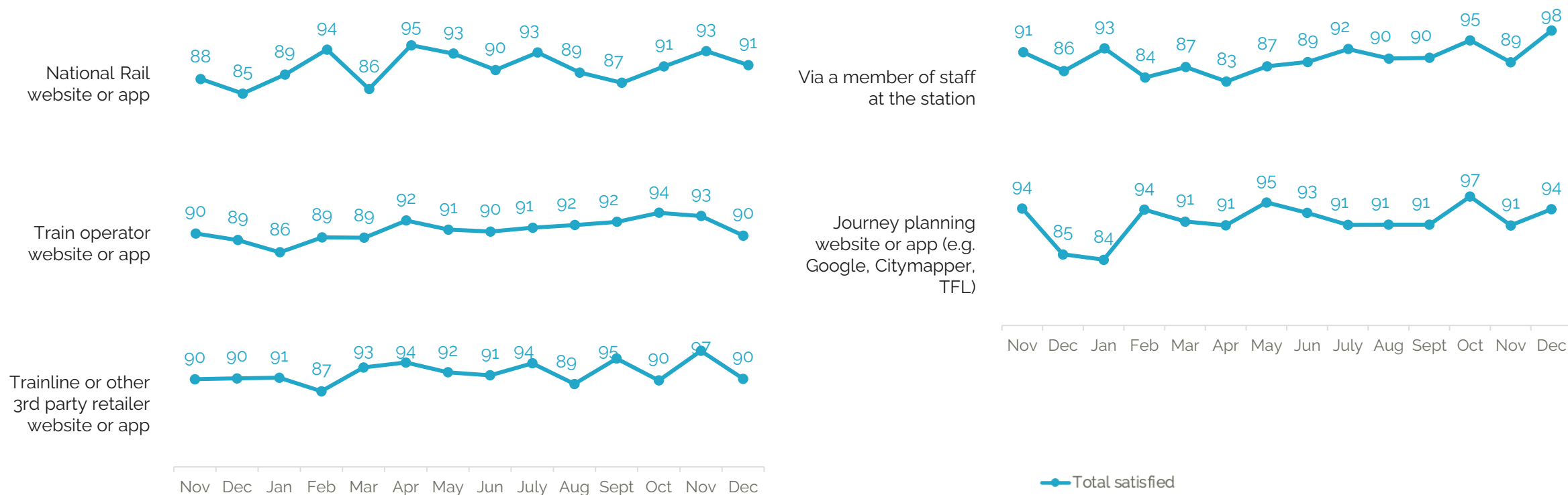
Information channels used and satisfaction with each when planning and booking a journey (%)



Satisfaction with information channels

Satisfaction with NR has improved on last quarter and this time last year. For train operators, scores are consistently high despite a dip in December, while for Trainline the satisfaction ratings continue to be variable. Staff members and journey planning tools have some of their most positive months yet, achieving 98% satisfaction in December for information from staff and 97% in October for journey planning websites/apps.

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

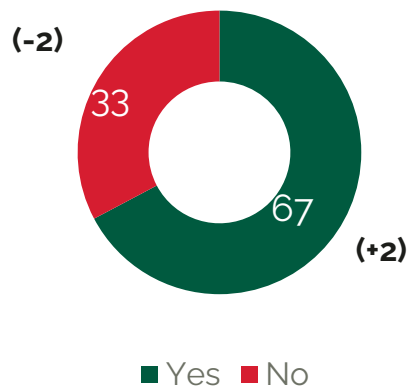


How satisfied were you with the information that was provided on the channels you used when planning and booking your journey? (excl DK) Nov/Dec 22/Jan/Feb/Mar/Apr/May/June/July/Aug/Sept/Oct/Nov/Dec 23 - National rail website or app (250/264/290/236/275/246/249/308/269/271/245/279/294/273), Train operator website or app (204/223/217/187/266/204/173/286/231/226/212/217/260/258), Trainline or other 3rd party retailer website or app (258/236/220/204/239/217/240/270/231/219/256/210/207/230), Via a member of staff (111/112/126/105/119/124/109/146/112/123/137/147/121/108), Journey planning website or app (94/103/121/94/100/85/114/129/115/107/91/97/98/131)

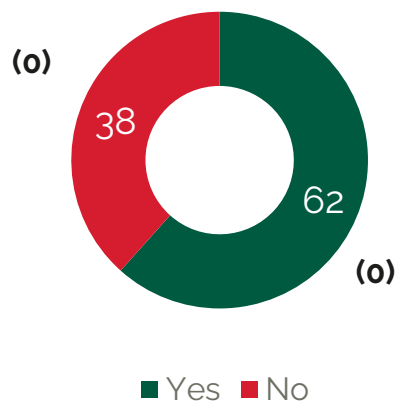
Information about facilities available

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%). Receiving a combination of information about facilities at the station and on-board is appreciated by most passengers when compared to those who only receive information at one point or the other.

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



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

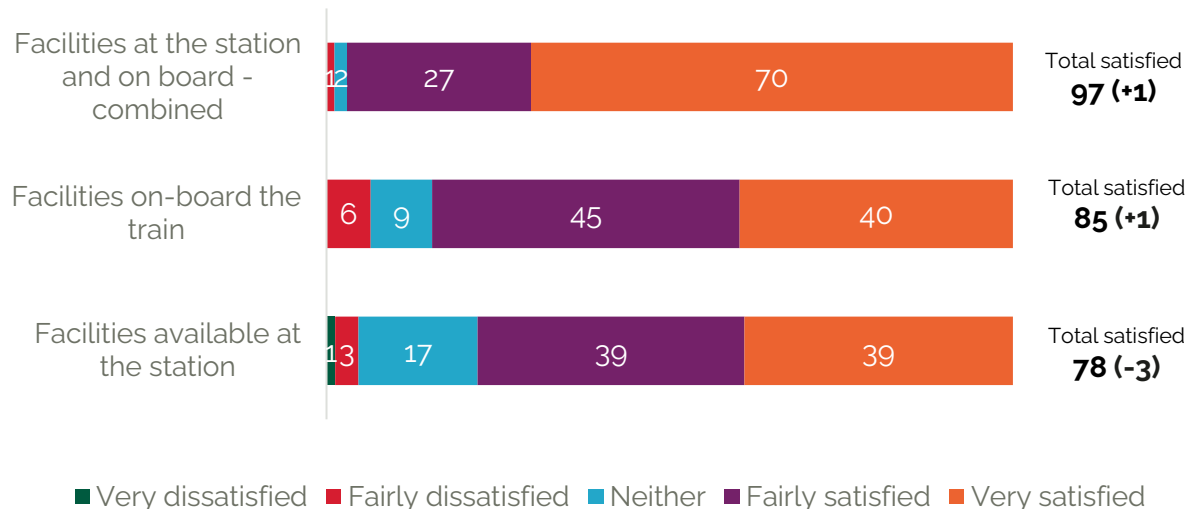


Usefulness of information about the facilities at the station (%)



■ Not at all useful ■ Somewhat not useful ■ Neither nor ■ Somewhat useful ■ Very useful

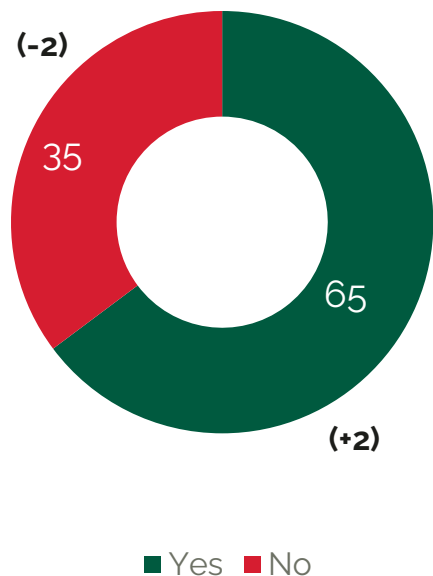
Satisfaction of information about the facilities available* (%)



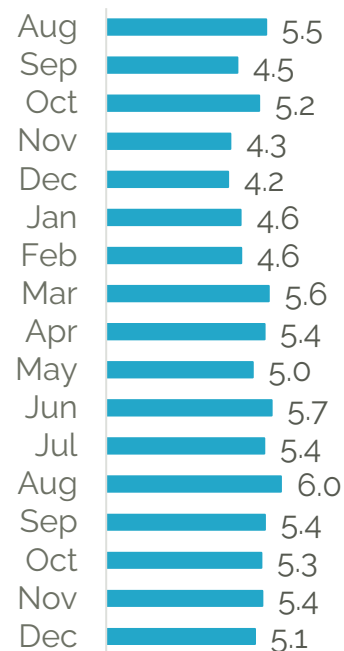
Changes to train times

Two thirds 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 (an decrease of 1 day on average compared to last quarter). Nevertheless, passengers are happy with the length of time in advance for receiving train time changes, having seen a significant improvement this quarter.

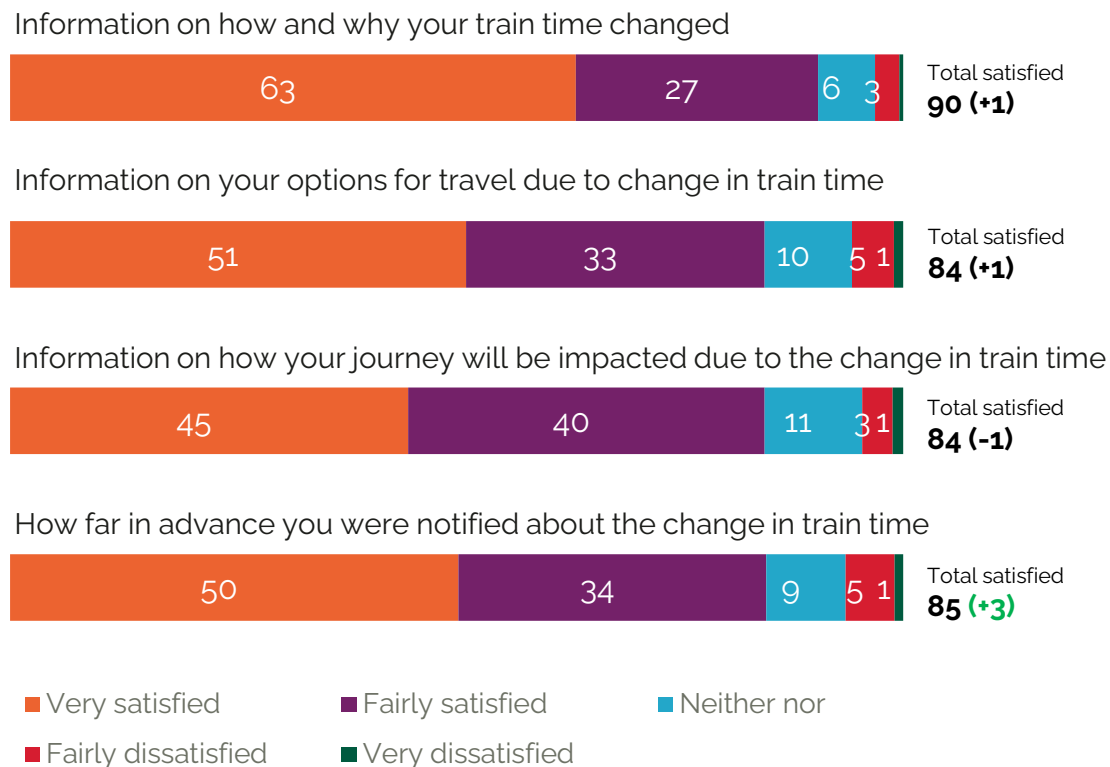
Found changes to train times (%)



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



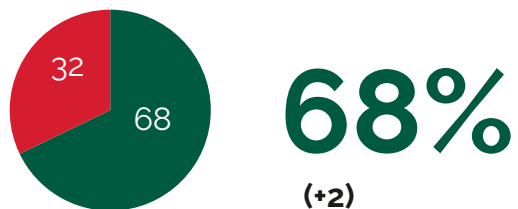
Satisfied with the following (%)



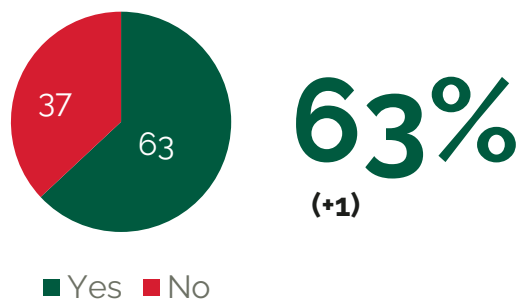
Date provision and seat availability for advance ticket booking

Of those who received information on dates available for advance ticket booking (68%), passengers continue to be very positive about the range of information and how well they were kept informed about the dates available (89%-94%). 63% receive information on seat availability and the majority of passengers are satisfied with this information.

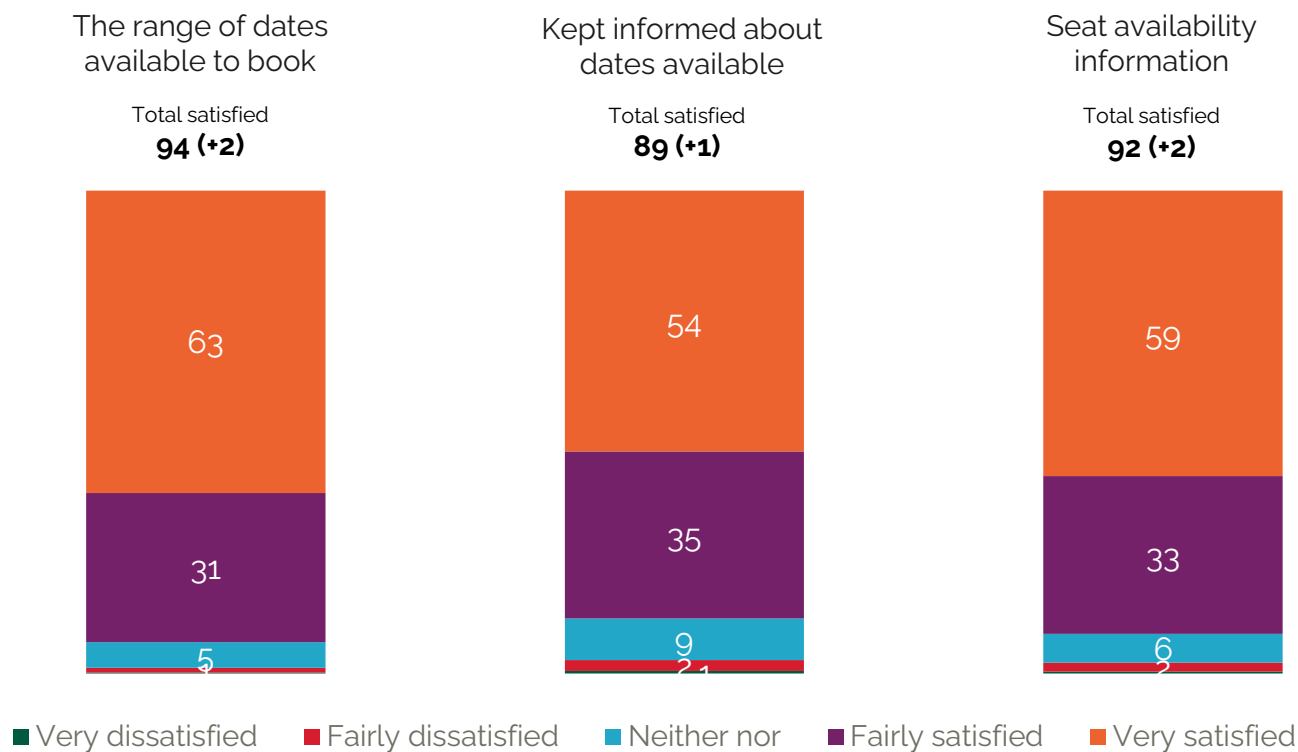
Found list of dates currently available for advance ticket booking (% yes)



Found seat availability on the train (% yes)



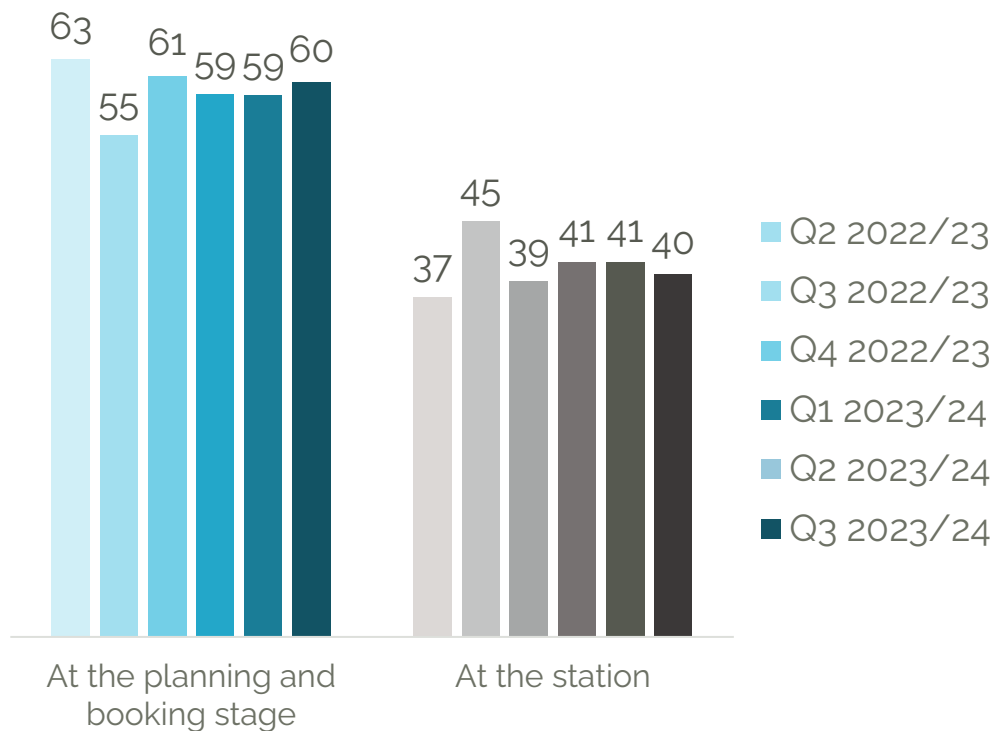
Satisfaction with advance booking information and seat availability (%)



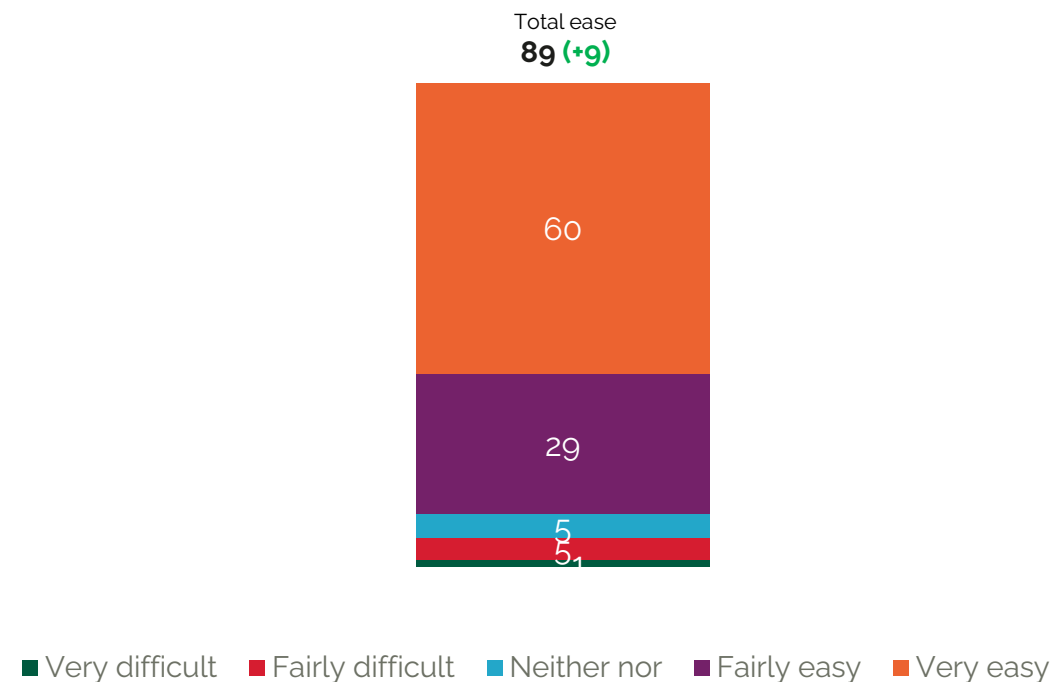
Stage informed about rail replacement bus and ease in finding such information

Of those experiencing a rail replacement bus, 3 in 5 are informed about this before making their journey. There has been a significant improvement in the ease of finding out where the bus replacement would be located as this point in the journey.

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

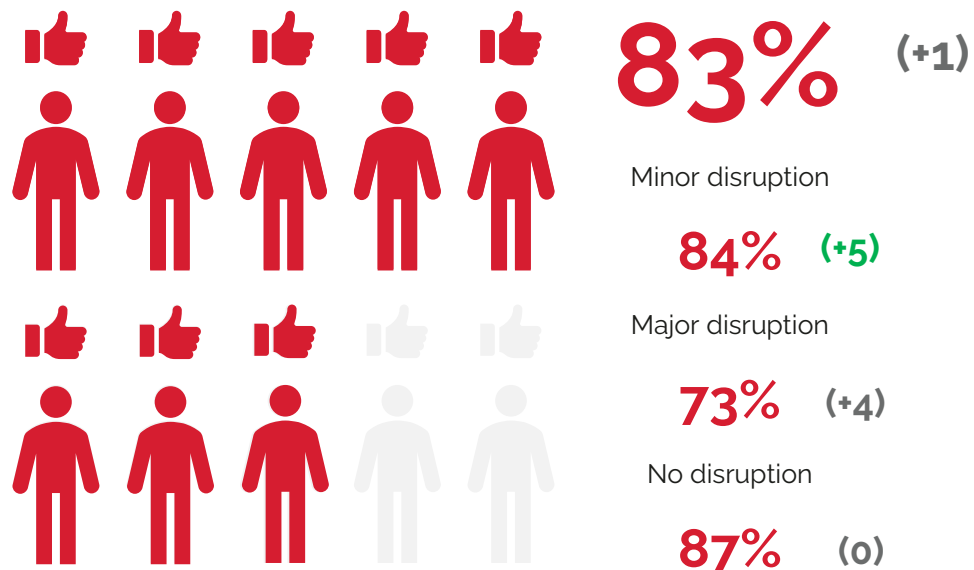
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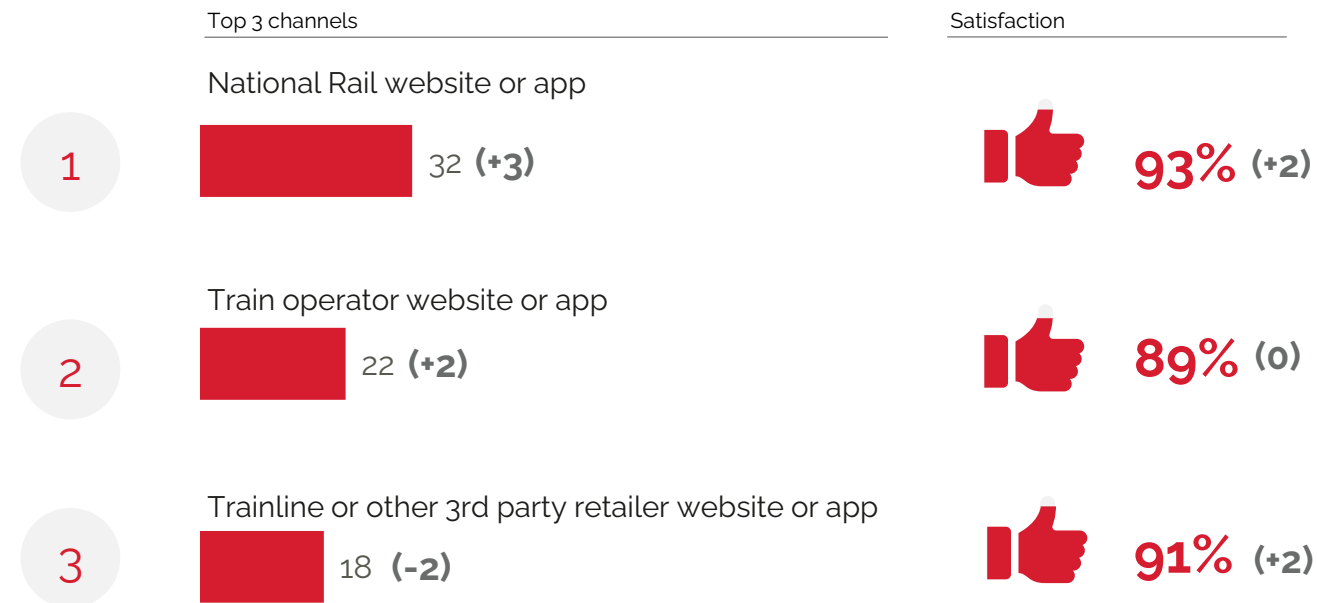
Journey to the station – Key satisfaction metrics

At an overall level, satisfaction with information during the journey to the station is relatively similar wave on wave - 83% of rail passengers on their way to the station were satisfied with the information provided. This stage receives slightly lower satisfaction ratings than other points, though is showing signs of improvement among those disrupted. NR website or app is most used at this stage and continues to perform very highly among passengers.

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



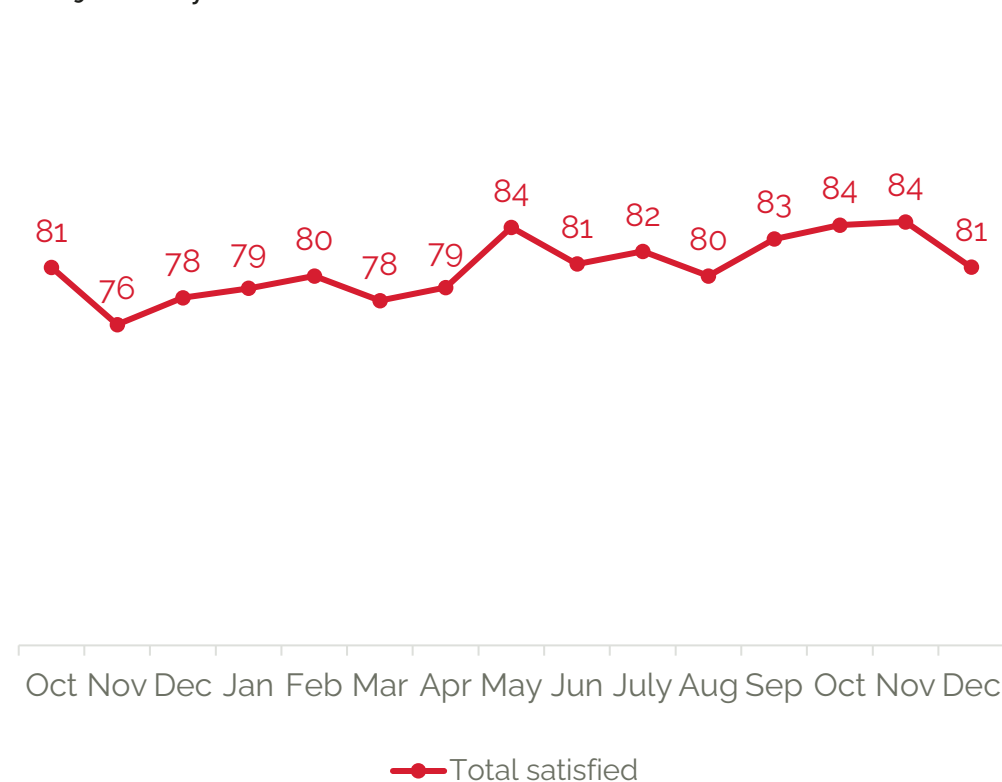
Top 3 channels used and their satisfaction (%):



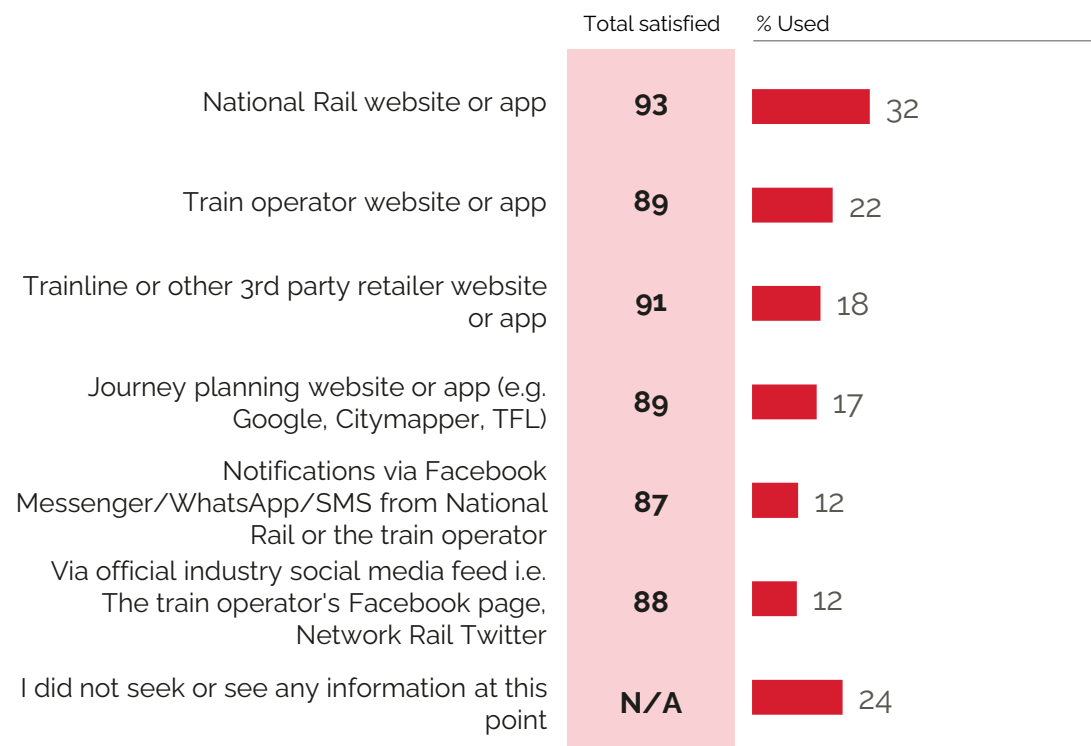
Overall satisfaction with information provided and information channels used when making the journey to the station

Information at this point in the journey has improved in comparison to the same point a year ago, with satisfaction averaging at 83% compared to 78% in Oct-Dec 2022. This stage does not appear to be impacted by a significant decline in satisfaction as seen at the previous journey stage. Channel usage correlates to perceived satisfaction, with very high satisfaction reported for all channels used.

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 (%)

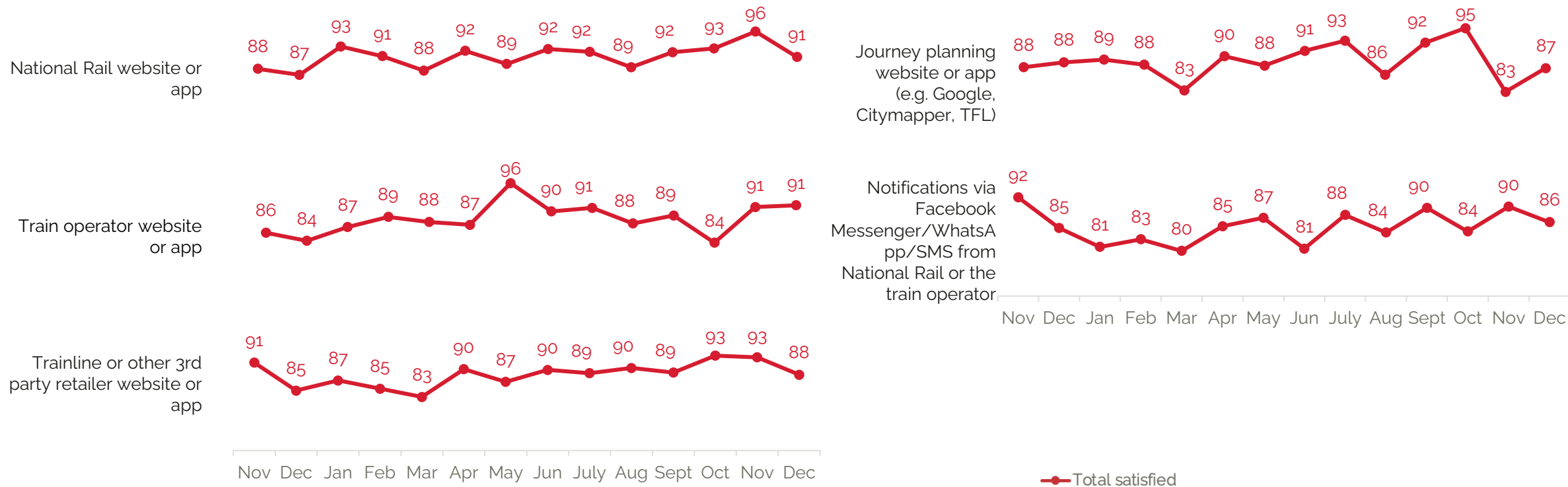


Overall, how satisfied were you with the information provided about your upcoming rail journey when on your way to the station? Oct/Nov/Dec 22/ Jan/Feb/Mar/Apr/May/June/July/Aug/ Sep/ Oct/Nov/Dec 23 (788/746/770/742/668/779/724/732/921/735/757/733/728/753/773). Which of the following information channels did you utilise when on your way to the station? How satisfied were you with the information that was provided on the channels you used when on your way to the station? (excl DK) July-Sep 23 (2541)

Satisfaction with information channels

The satisfaction over the last 3 months among the top 5 most used channels has been more turbulent in nature. The NR website/app reached its highest point in November, albeit then returning to levels seen previously in December, while for TOC websites/apps and journey planning websites/apps experienced a significant drop in satisfaction in October and November respectively (both of which were driven by the experience of 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/June/July/Aug/Sep/Oct/Nov/Dec 23 - National rail website or app (255/269/230/197/214/240/250/303/249/248/230/266/275/276), Train operator website or app (140/150/134/133/149/150/148/216/175/182/156/160/187/206), Trainline or 3rd party website or app (195/175/131/144/152/159/196/227/163/193/182/168/149/182), Journey planning website or app (e.g. Google, Citymapper, TFL) (106/143/133/95/106/117/132/149/137/130/123/128/119/161), Notifications via Facebook Messenger/WhatsApp/SMS from National Rail or the train operator (78/89/86/105/79/88/96/110/92/94/88/82/108/119)



At the station

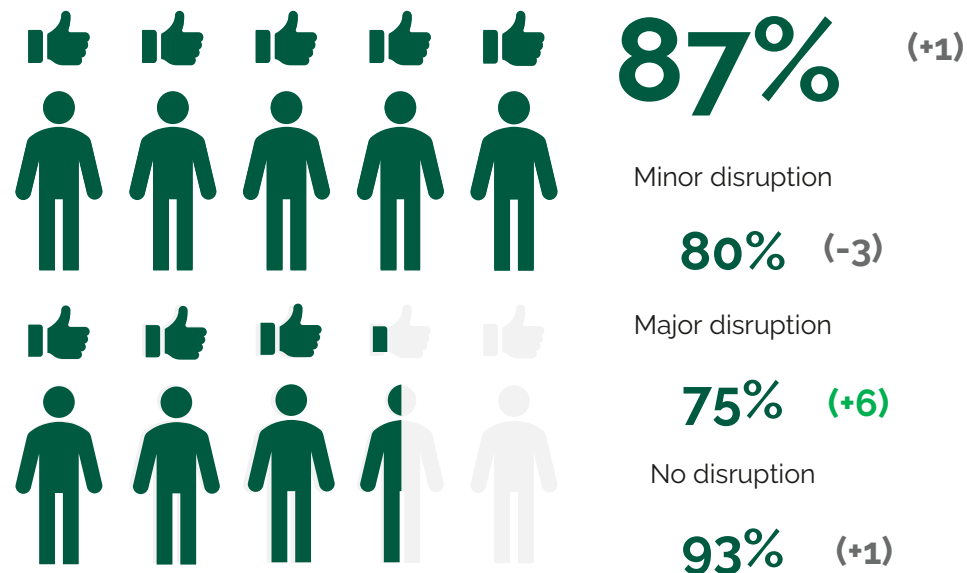
Rail Delivery Group



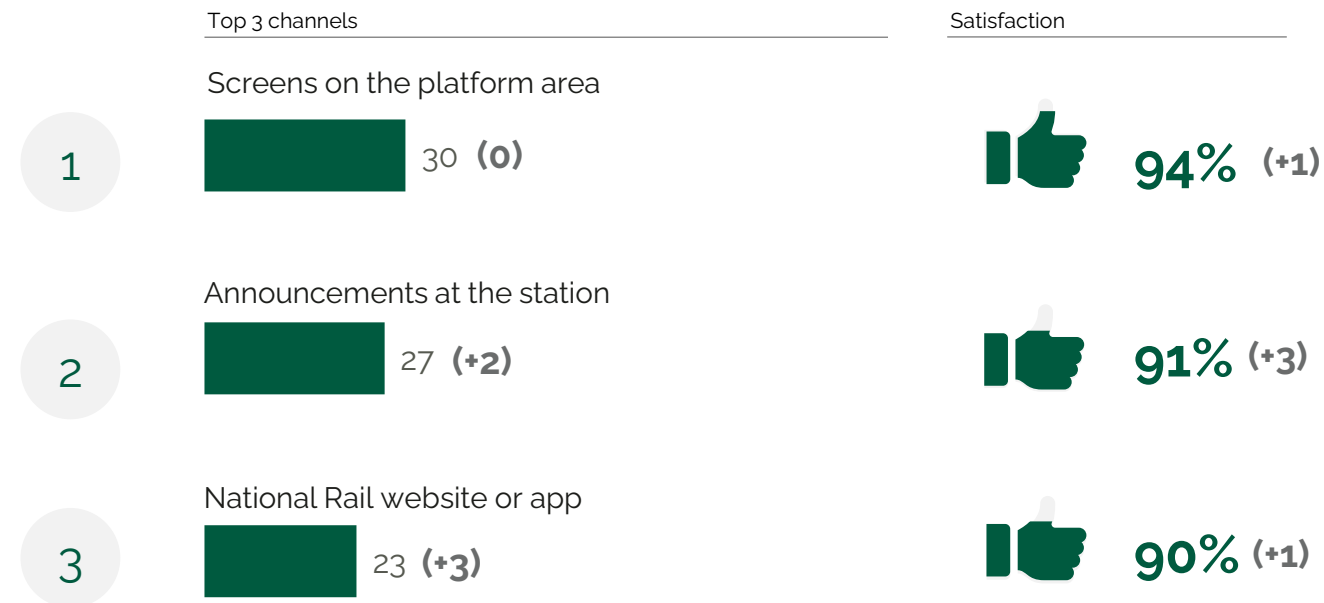
At the station – Key satisfaction metrics

At the station, 87% were satisfied with the information they are provided about their upcoming rail journey, and a significant improvement among those experiencing major disruptions. The top 3 channels used are screens on the platform area, followed by announcements at the station and the NR website or app. Satisfaction with these channels is very high – between 90-94%.

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



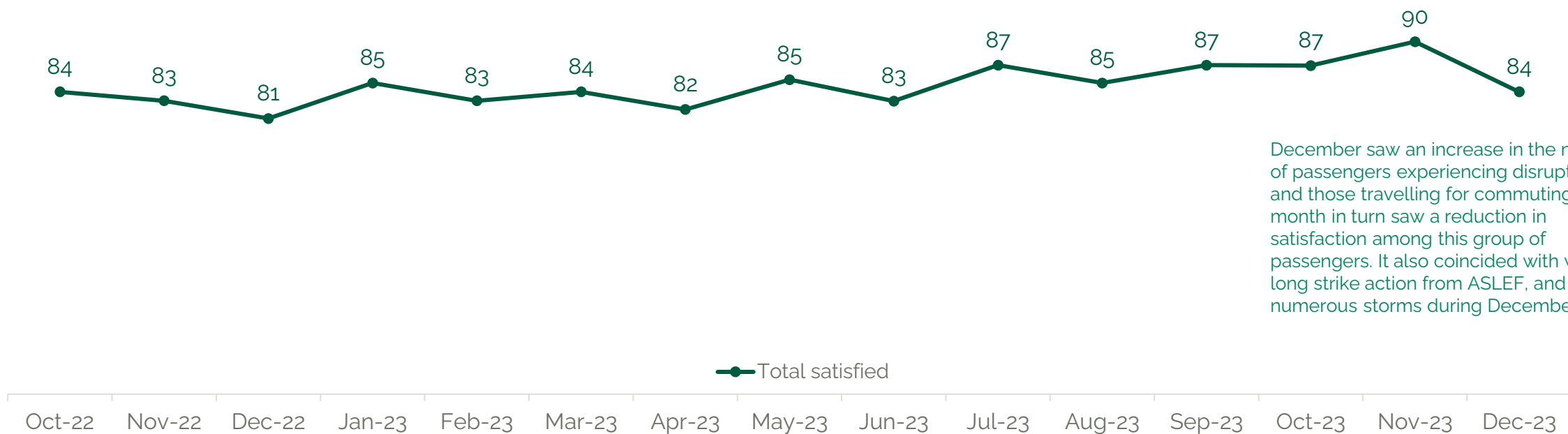
Top 3 channels used and their satisfaction (%):



Overall satisfaction with information provided when at the station

Looking at the trended satisfaction with information provided when at the station, November saw the best ratings yet at 90%. However, satisfaction was impacted in December, likely linked to increase in those disrupted during this month and a number of storms during this period impacting timetables of scheduled departures.

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



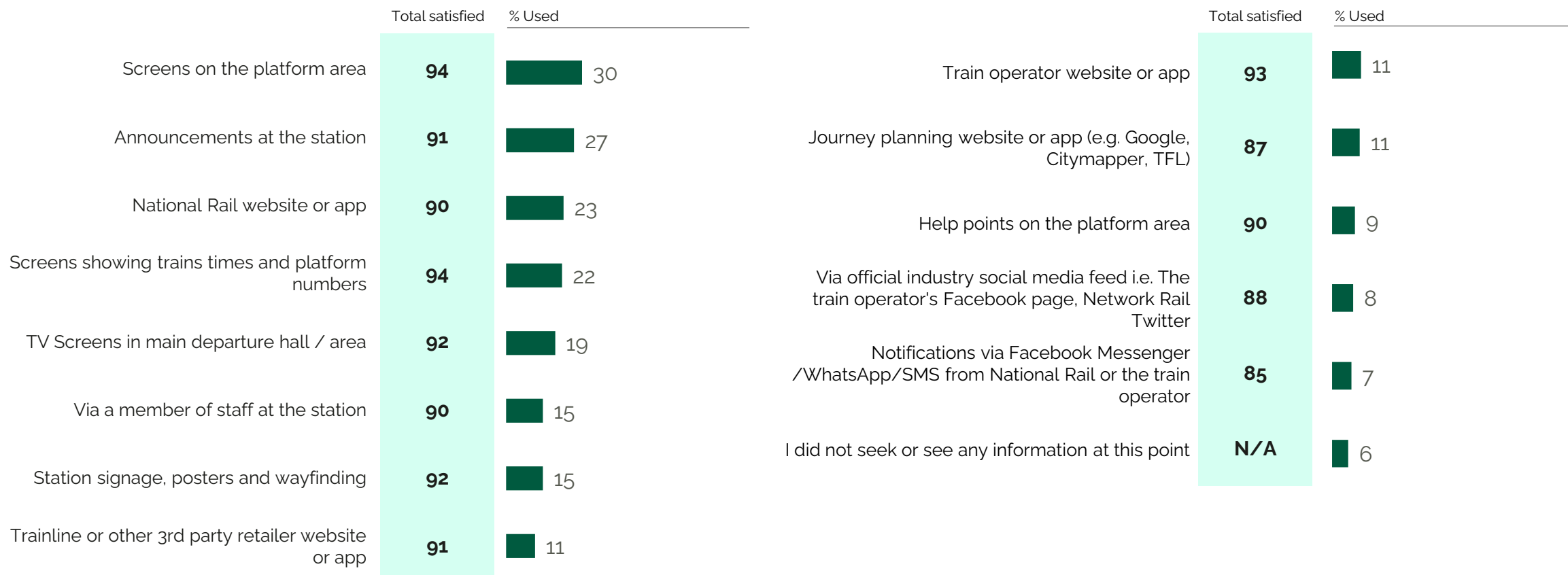
December saw an increase in the number of passengers experiencing disruptions and those travelling for commuting. This month in turn saw a reduction in satisfaction among this group of passengers. It also coincided with week-long strike action from ASLEF, and numerous storms during December.

—●— Total satisfied

Information channels used and their satisfaction

Alike other stages, higher incidence channels perform better regarding the rating of the information they provide. Positively, screens on the platform area continue to perform well, with almost a third of passengers using them when at the station, and nearly all are satisfied with the information it provides.

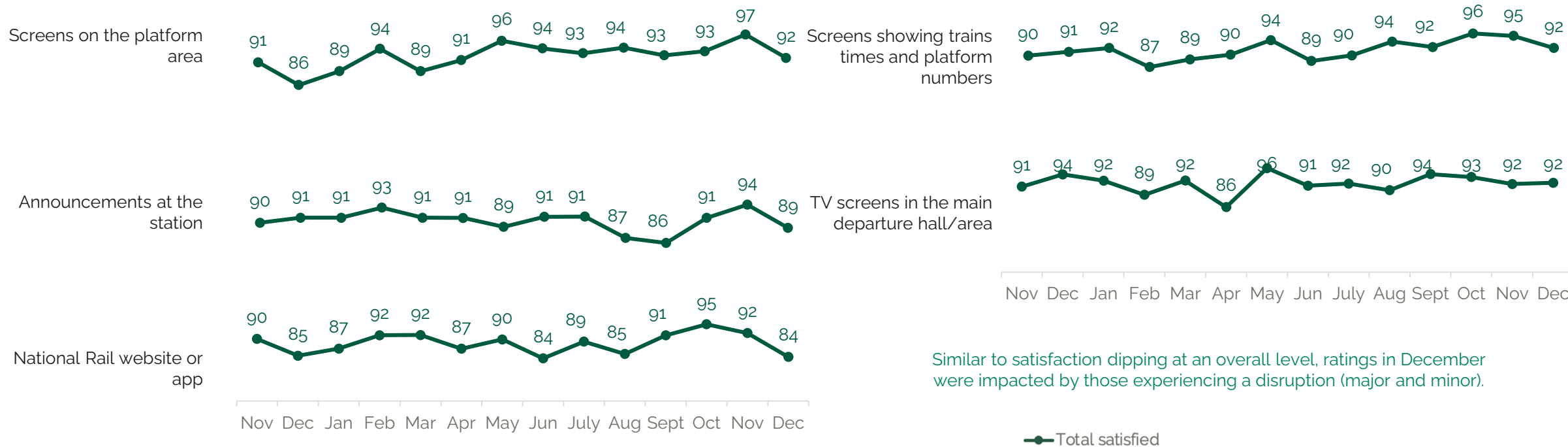
Information channels used and satisfaction with each when at the station (%)



Satisfaction with information channels

Most of the channels perform very well during the last quarter, particularly in November 2023 for screens on the platform area, and announcements in the station. Nevertheless, December saw a significant decline among perceptions, particularly for NR website/app, and with this being a more heavily disrupted time period it is important that these channels can accommodate for this and support these passengers effectively.

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



Similar to satisfaction dipping at an overall level, ratings in December were impacted by those experiencing a disruption (major and minor).

—●— Total satisfied

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/June/July/Aug/Sep/Oct/Nov/Dec 23 - Screens on the platform area (215/224/236/205/272/235/211/287/254/221/258/258/246/235), Announcements at the station (206/187/188/188/203/195/218/256/212/206/211/214/237/217), National Rail website or app (159/170/155/134/149/155/152/201/164/165/159/176/193/188), Screens showing train times and platform numbers (152/164/162/151/191/163/178/210/171/181/167/183/185/176), TV screens in the main departure hall/area (136/136/143/145/147/143/140/180/163/160/158/183/148/158)

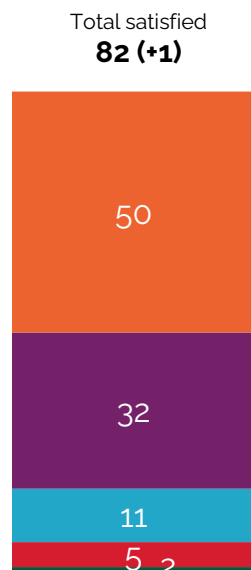
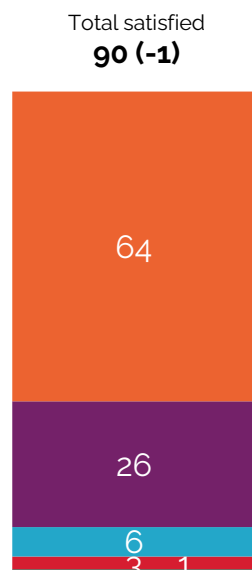
Satisfaction with experiences at the station

Looking at the type of information passengers receive; they continue to be satisfied with their experiences at the station. Timeliness of platform information remains the most highly rated. Staff assistance at the station appears to be improving, with now 3 in 4 suggesting the information provided from staff is helpful to them.

Updates on the platform and train (%)

Timeliness with which platform information was announced

Kept up to date about the status of the train



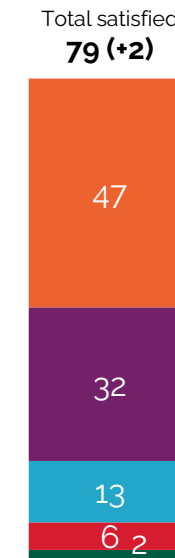
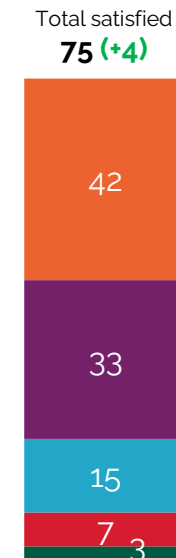
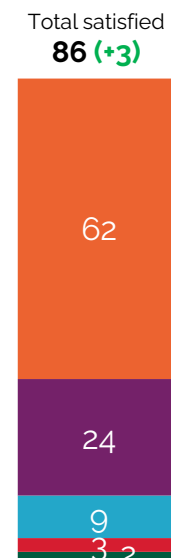
Very dissatisfied Fairly dissatisfied Neither nor Fairly satisfied Very satisfied

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)

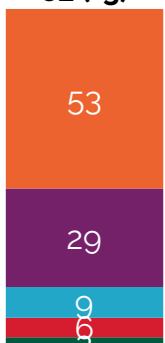
Timeliness of platform information is highest for all passengers. Keeping passengers up to date on the status of the train has improved considerably for those experiencing a minor disruption, though remains unchanged for those experiencing a major disruption. This information is key to guiding passengers on what to do next regarding their journey.

Updates on the platform and train (%)

Major disruption

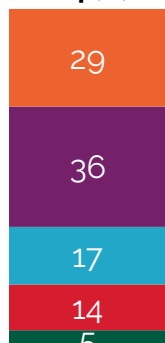
Timeliness with which platform information was announced

Total satisfied
82 (+3)



Kept up to date about the status of the train

Total satisfied
64 (0)



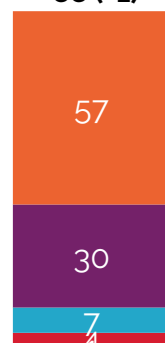
- Very dissatisfied
- Neither nor
- Very satisfied

- Fairly dissatisfied
- Fairly satisfied

Minor disruption

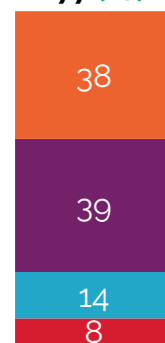
Timeliness with which platform information was announced

Total satisfied
88 (-1)



Kept up to date about the status of the train

Total satisfied
77 (+6)

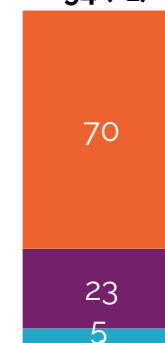


- Very dissatisfied
- Neither nor
- Very satisfied
- Fairly dissatisfied
- Fairly satisfied

No disruption

Timeliness with which platform information was announced

Total satisfied
94 (-1)



Kept up to date about the status of the train

Total satisfied
90 (+1)



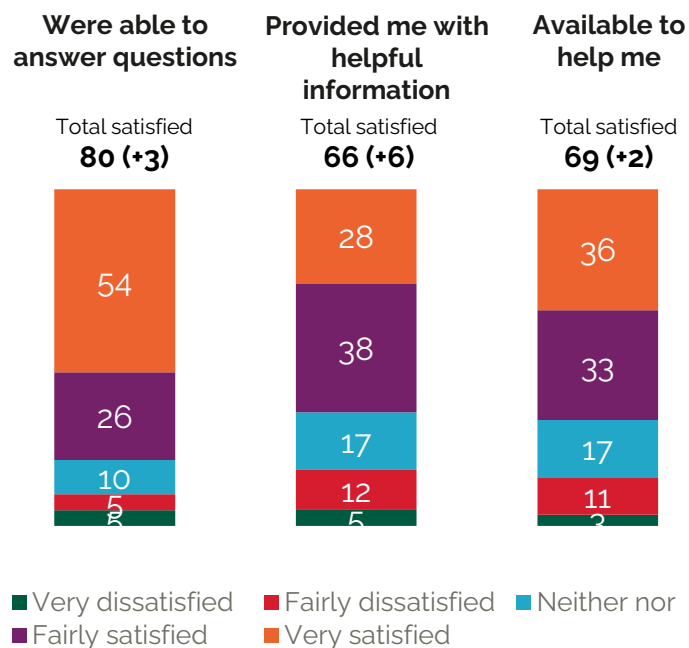
- Very dissatisfied
- Neither nor
- Very satisfied
- Fairly dissatisfied
- Fairly satisfied

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

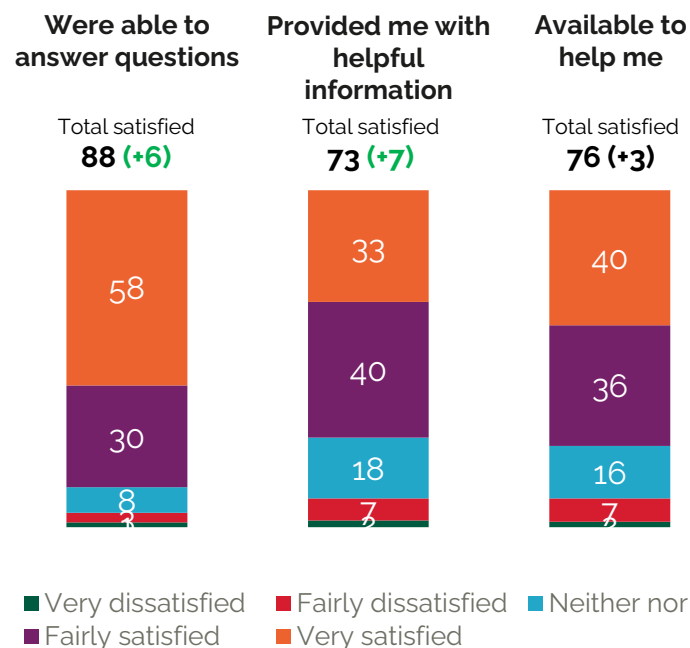
Regarding staff at the station, the non-disrupted continue to be the most satisfied. This being said, staff information continues to improve with ratings among the disrupted proving this. For instance, significantly more minor disrupted passengers feel that staff at the station are able answer their questions and provide helpful information compared to last quarter.

Staff (%)

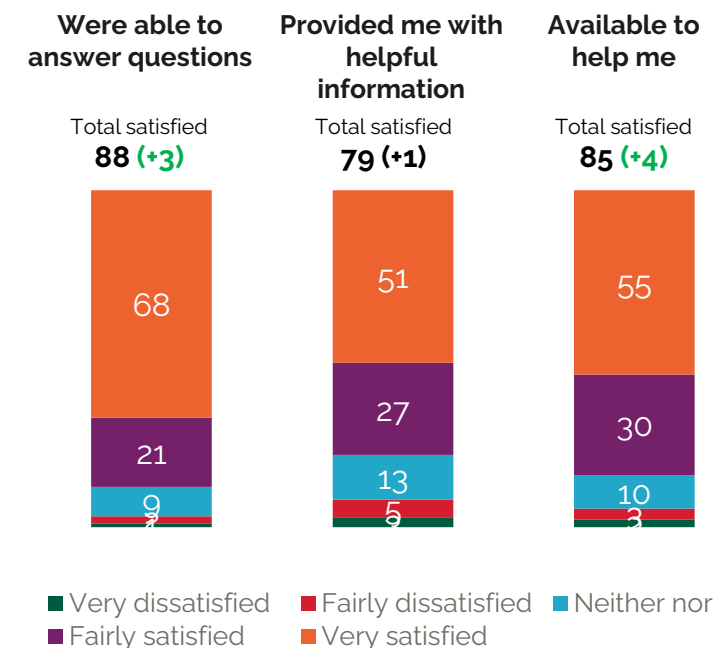
Major disruption



Minor disruption



No disruption

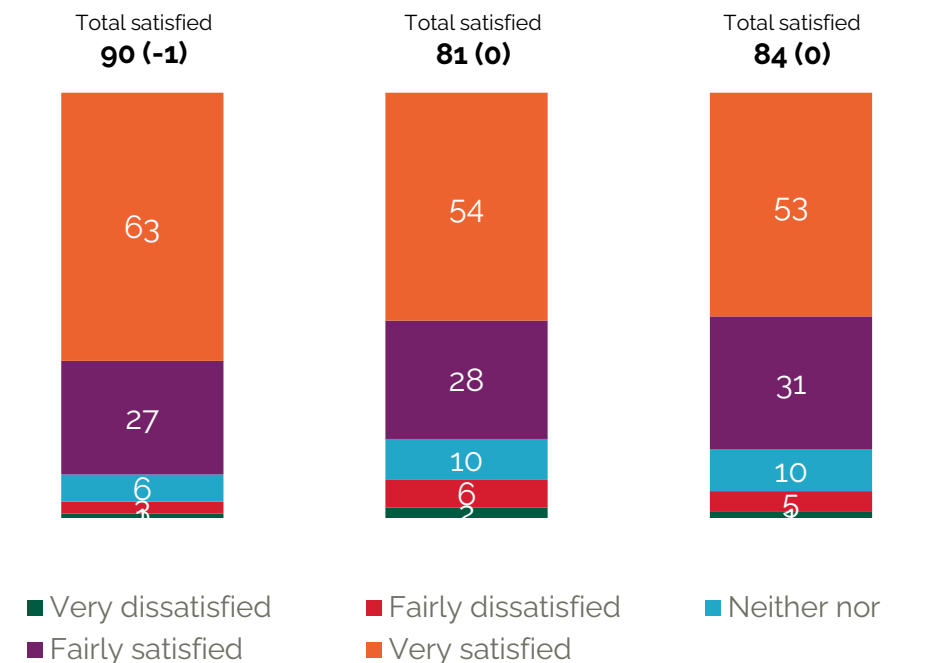


Satisfaction with and ratings of announcements at the station (1/3)

Considering their level of usage at the station (second most used), ratings of announcements remain consistently high.

Announcements at the station (%)

They were an appropriate length They were made at an appropriate time The frequency was at an appropriate level

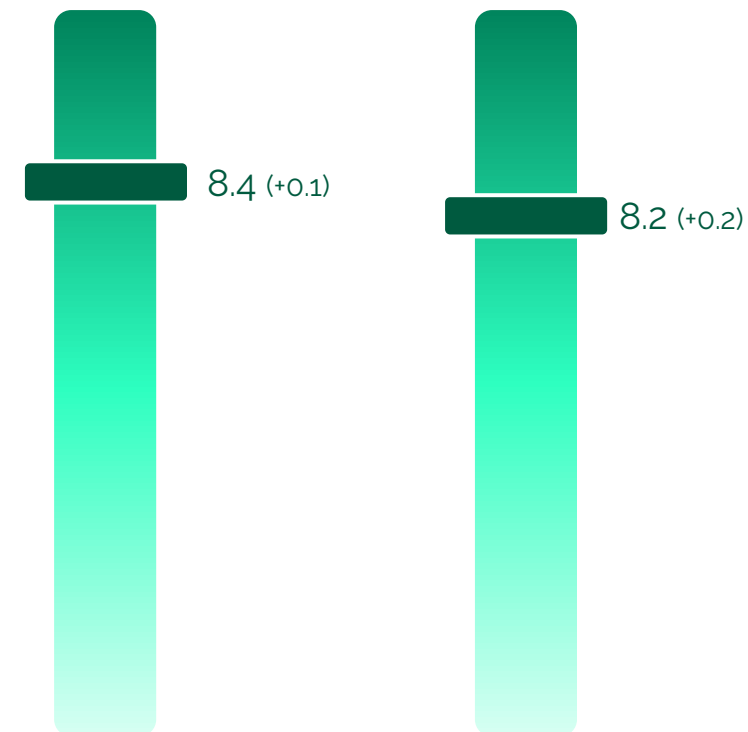


Strongly agree- 10

Strongly disagree - 1

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

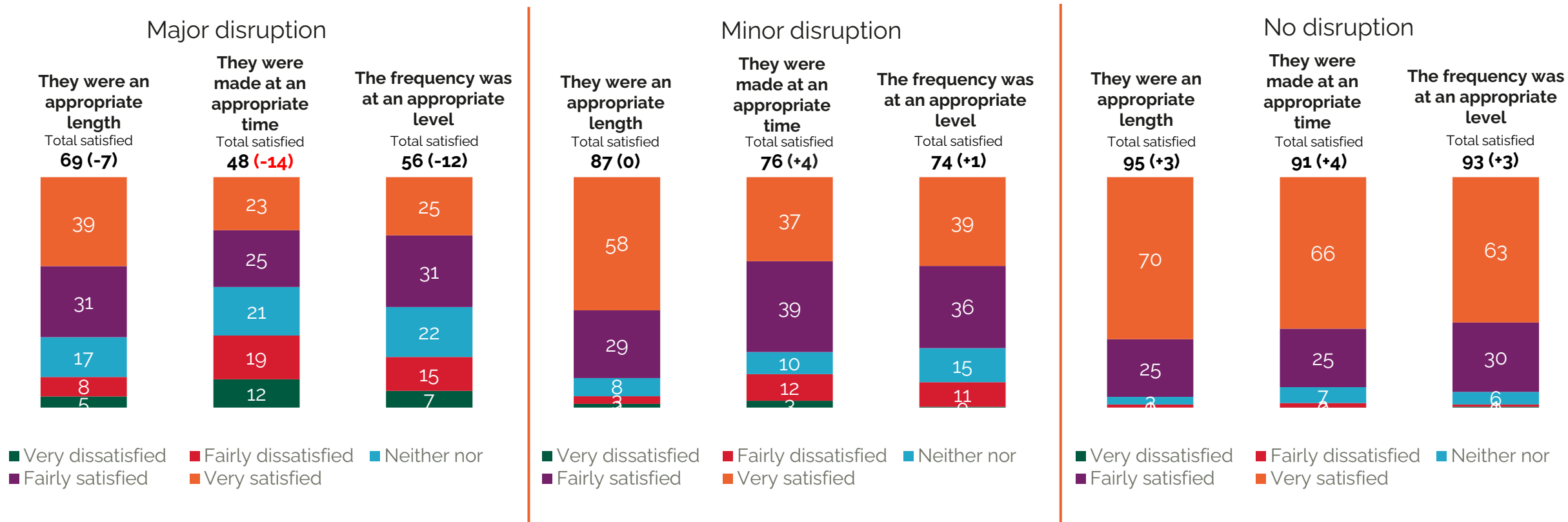
The frequency of announcements is right, they are repeated appropriately



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

Yet, the same level of rating is not apparent across all passenger groups. The major disrupted do not feel announcements are made at the right time, along with frequency – both of which receive a high level of dissatisfaction compared to other passengers. The non-disrupted are more likely to rate length, frequency and timing highly.

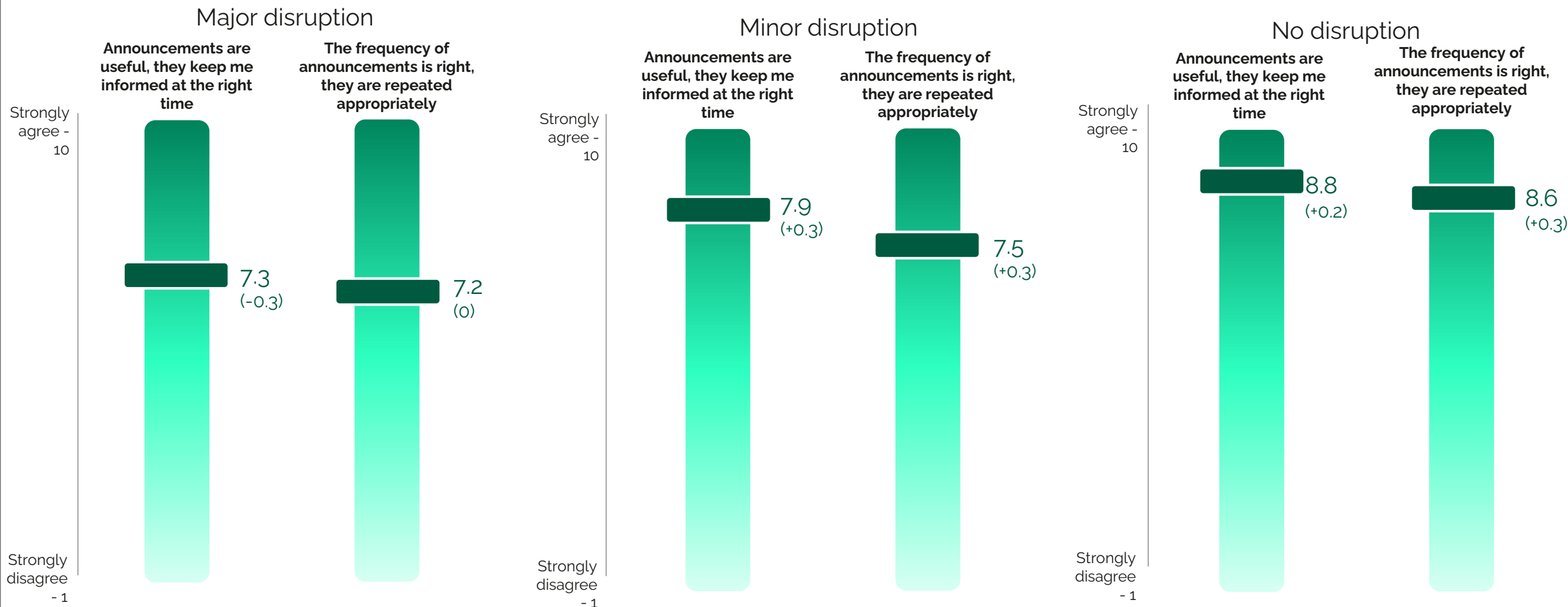
Announcements at the station (%)



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

For the non-disrupted generally announcements are perceived to have been about right, and for the minor disrupted this has improved. For major disruptions, it is key that announcements are useful, frequent and at the right time so they can make further decisions about their upcoming journey.

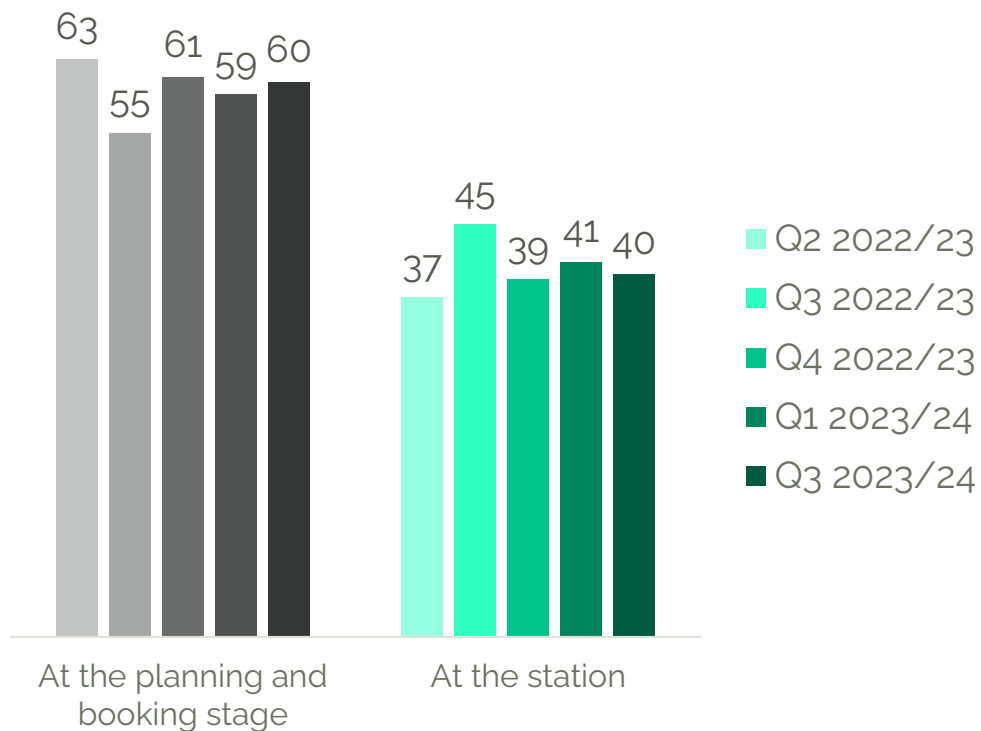
Announcements at the station (%)



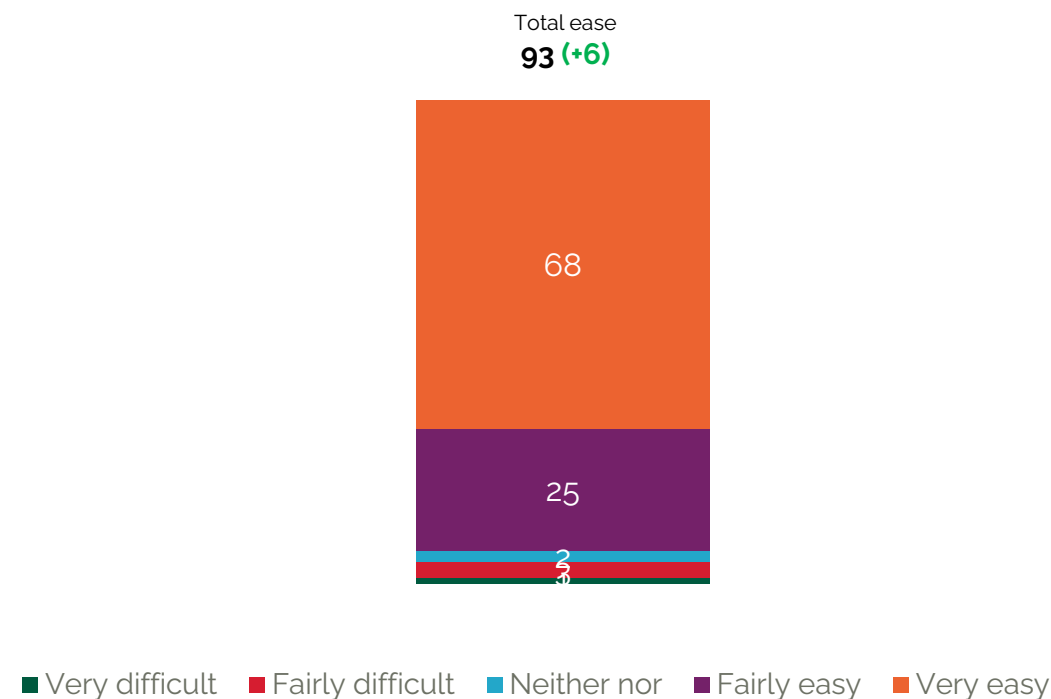
Stage informed about rail replacement bus and ease in finding such information

Positively, the trend shows that fewer passengers are receiving rail replacement bus information at the station, but rather in advance of their journey. Where information was provided about the upcoming bus replacement, nearly all felt this information was easy to find and a significant improvement on last month.

Stage informed about the rail replacement bus (%)



Ease with finding bus departure point (%)





On board the train

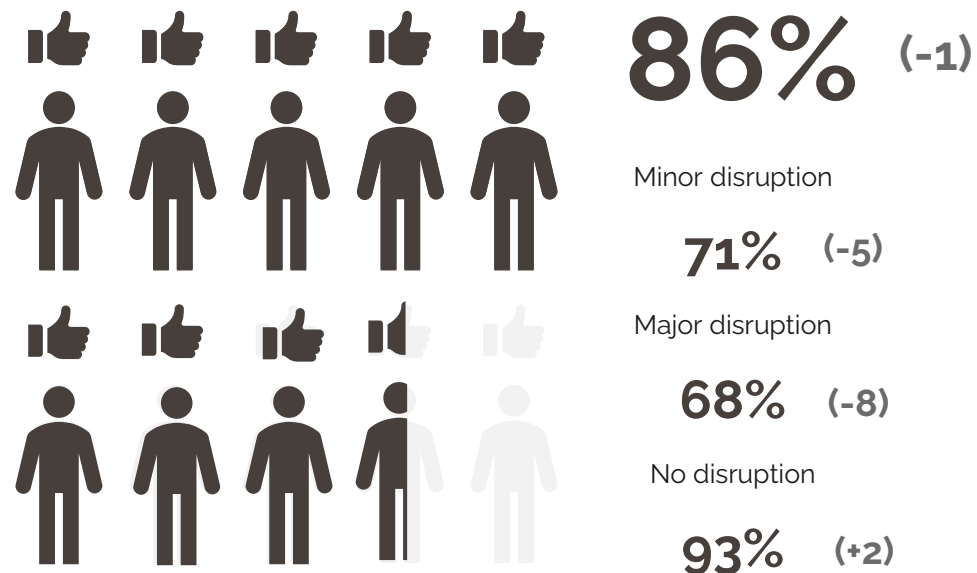
Rail Delivery Group



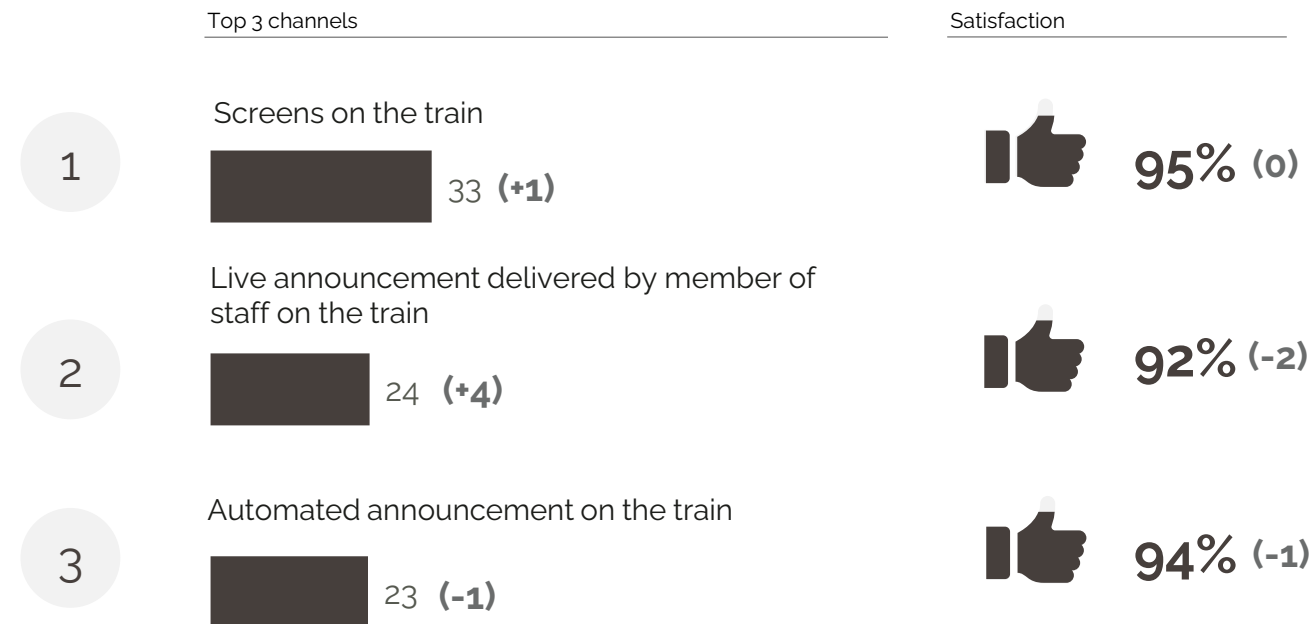
On board the train – Key satisfaction metrics

Overall, the satisfaction score given to information provided on the train was 86% - driven by those experiencing no disruption. Like at the station, passengers rely on the screens and announcements as their main sources of information. All of these share a very high satisfaction rating of 92-95%.

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



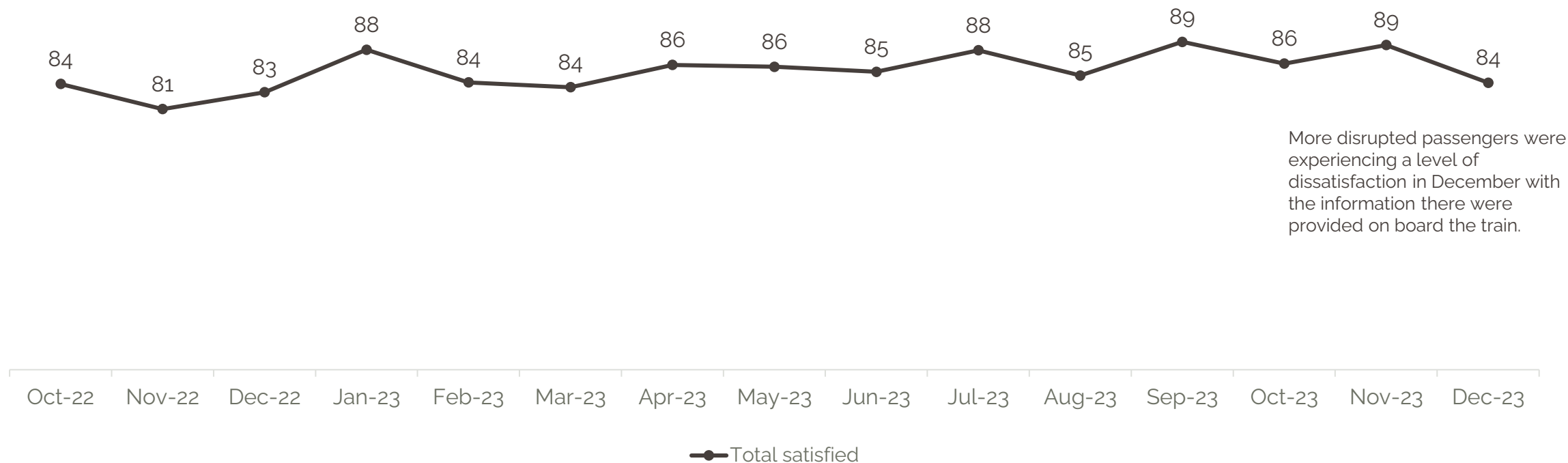
Top 3 channels used and their satisfaction (%):



Overall satisfaction with information provided when on board the train

Satisfaction with information on board the train is generally quite positive, in line in with figures reported in the last few quarters, and above those reported at the same point a year ago (up from 83% to 86%). December saw a significant dip in the ratings, driven by those experiencing a disruption.

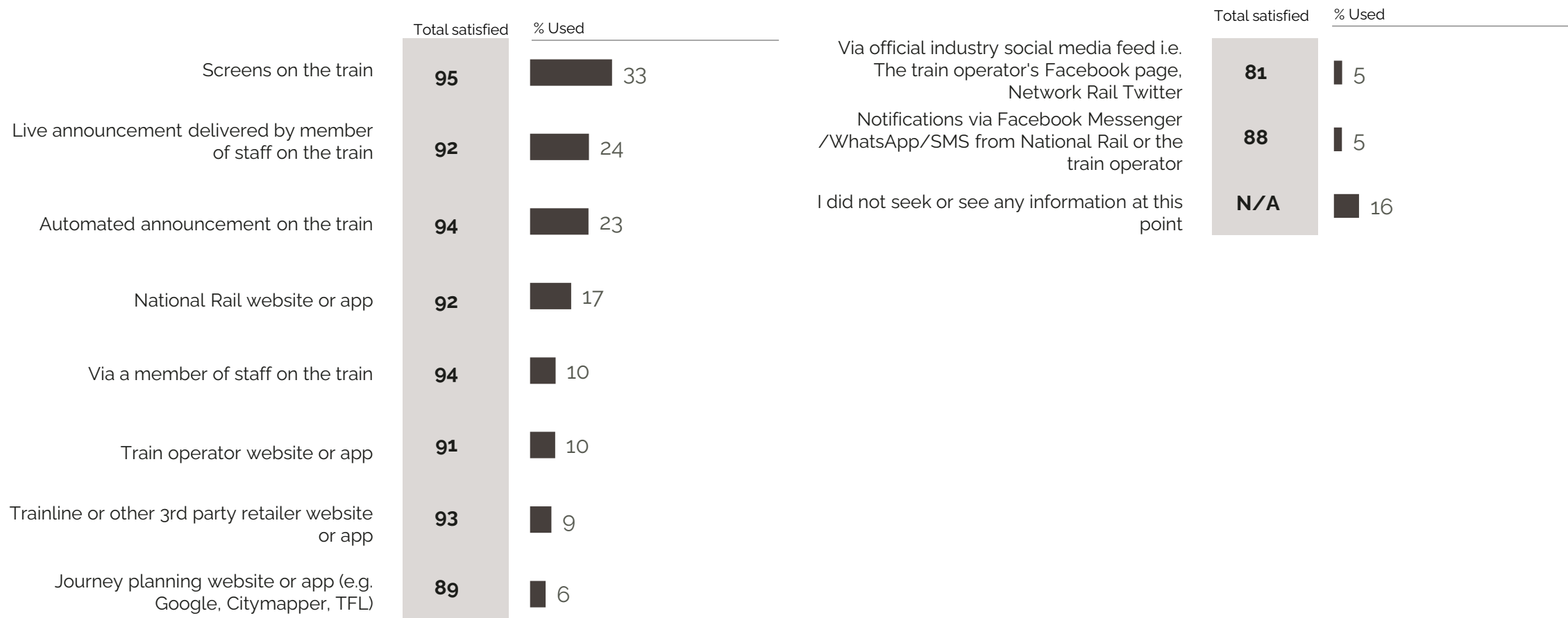
Overall satisfaction with information provided when on board the train – trended (%)



Information channels used and their satisfaction

Information channels used on board the train generally achieve a high satisfaction rating, particularly when focusing on the top 3 used channels – screens, live announcements and automated announcements.

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

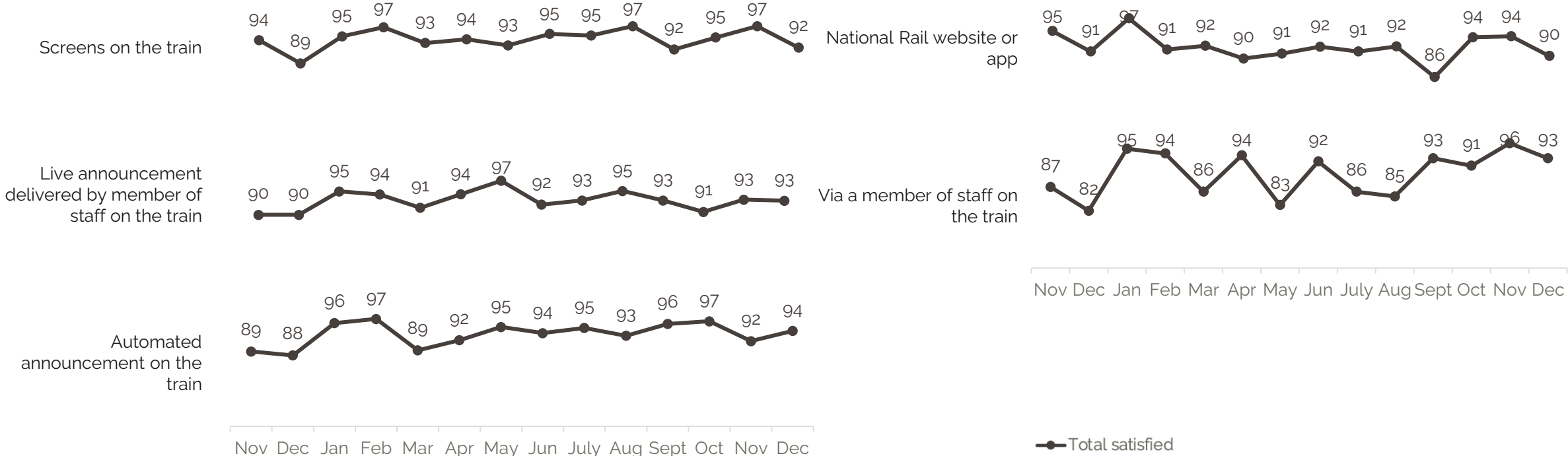


Satisfaction with information channels

Screens on the train continues to provide information that receives a high satisfaction rating., though in December ratings declined again among those experiencing a small or no disruption, and these are a group who rely more heavily on the screens. Live announcements perform well, while the satisfaction with the other 3 channels are changeable over time (though no trends are significant).

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

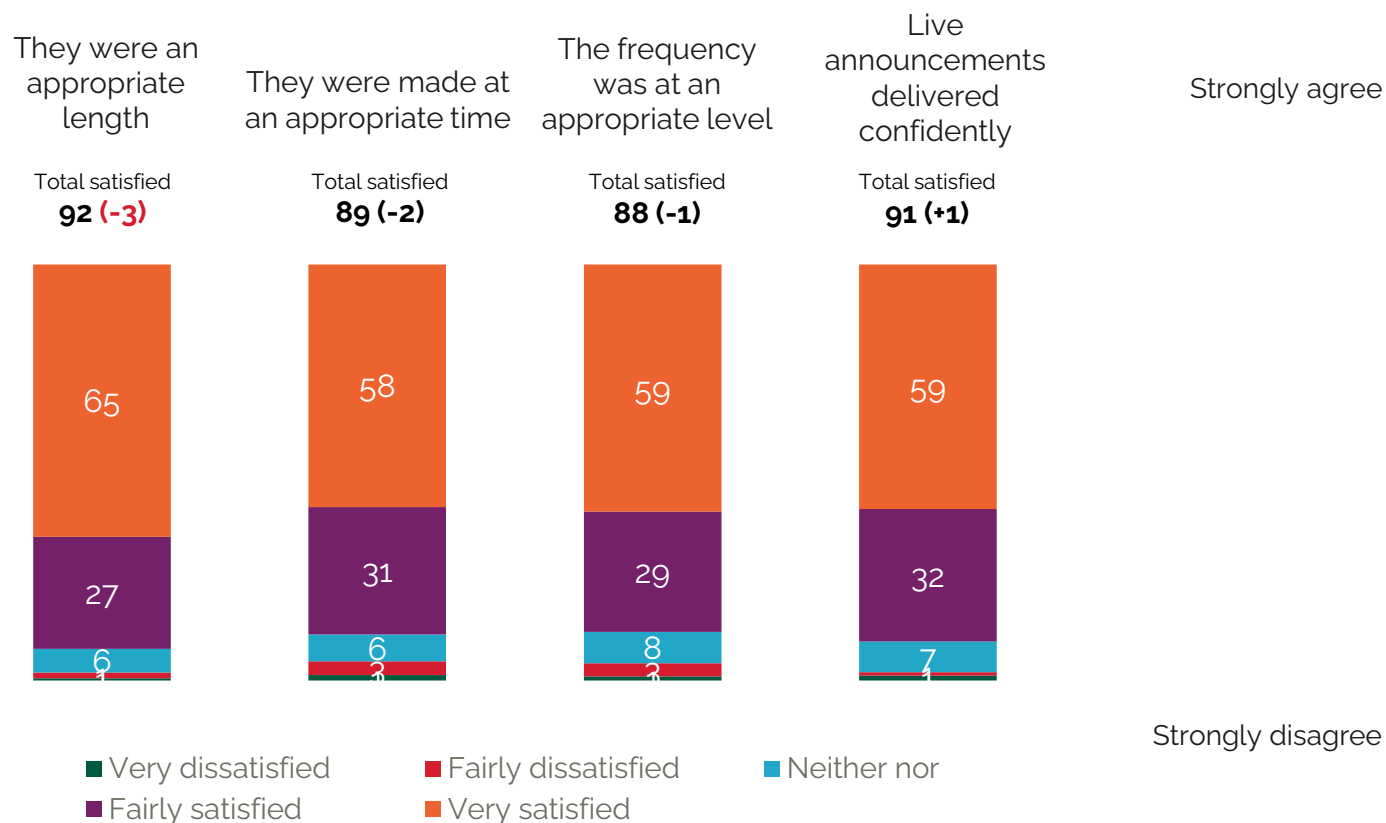
The significant decline in satisfaction in December was reported most by those experiencing a minor or no disruption, who use the screens more.



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

At an overall level, satisfaction with announcements on board continues to remain high, albeit the length is an area showing a significant decline this quarter.

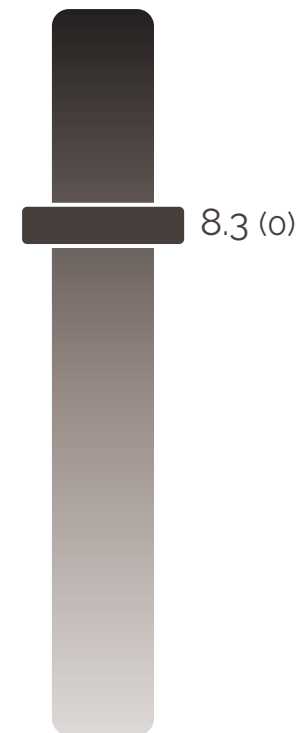
Announcements on board the train (%)



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



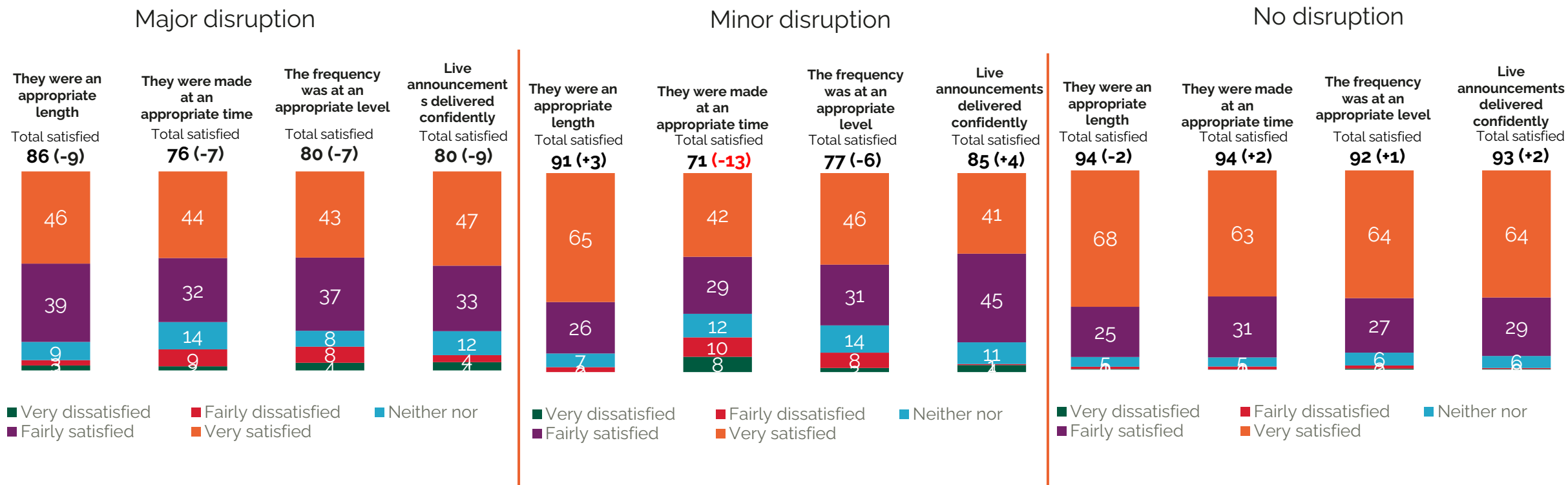
The frequency of announcements is right, they are repeated appropriately



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

The ratings of announcements are showing a negative trend among those experiencing a disruption, particularly on the timing of the announcements for those experiencing a minor disruption. With announcements being a key tool during a time of disruption, it is key that these perceptions do not fall any further.

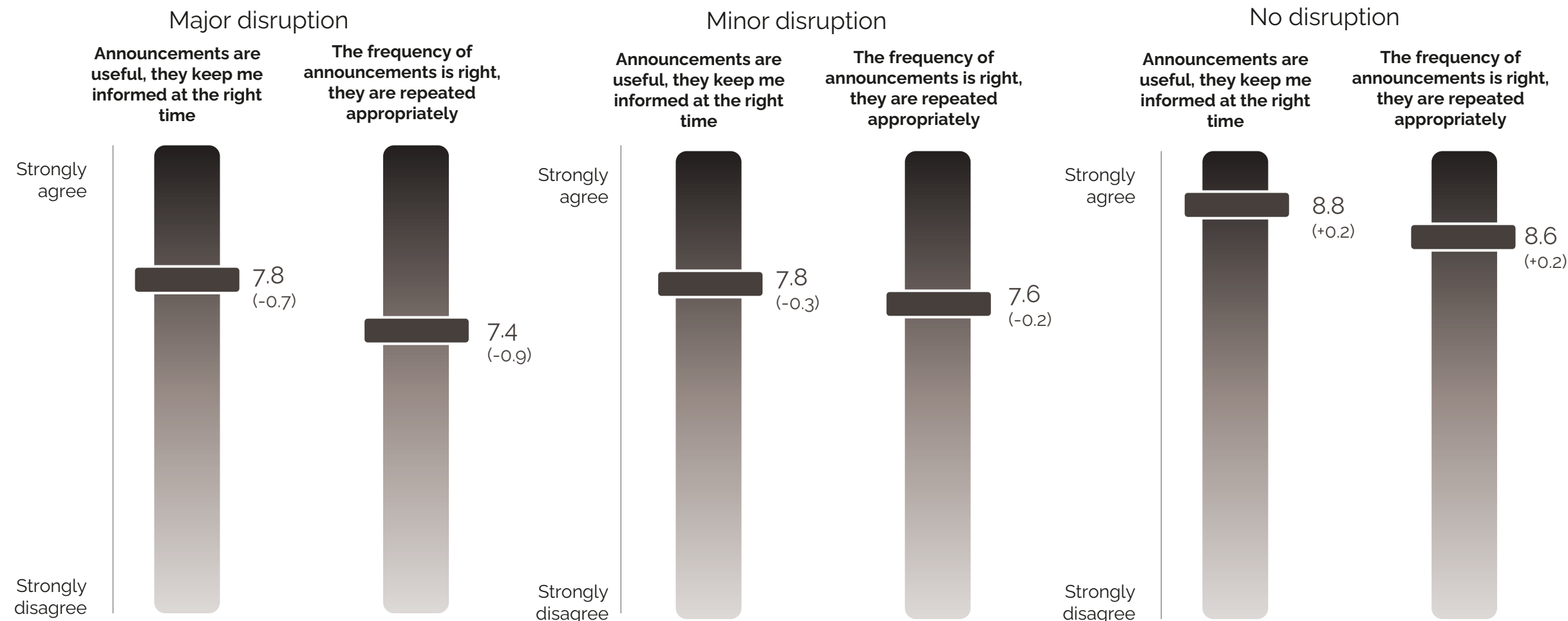
Announcements on board the train (%)



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

The experience of announcements on board differs to last quarter, with the major disrupted no longer in line with the views of those with no disruption. It is important that during a time of disruption that the information is tailored to the situation in order to best support passengers.

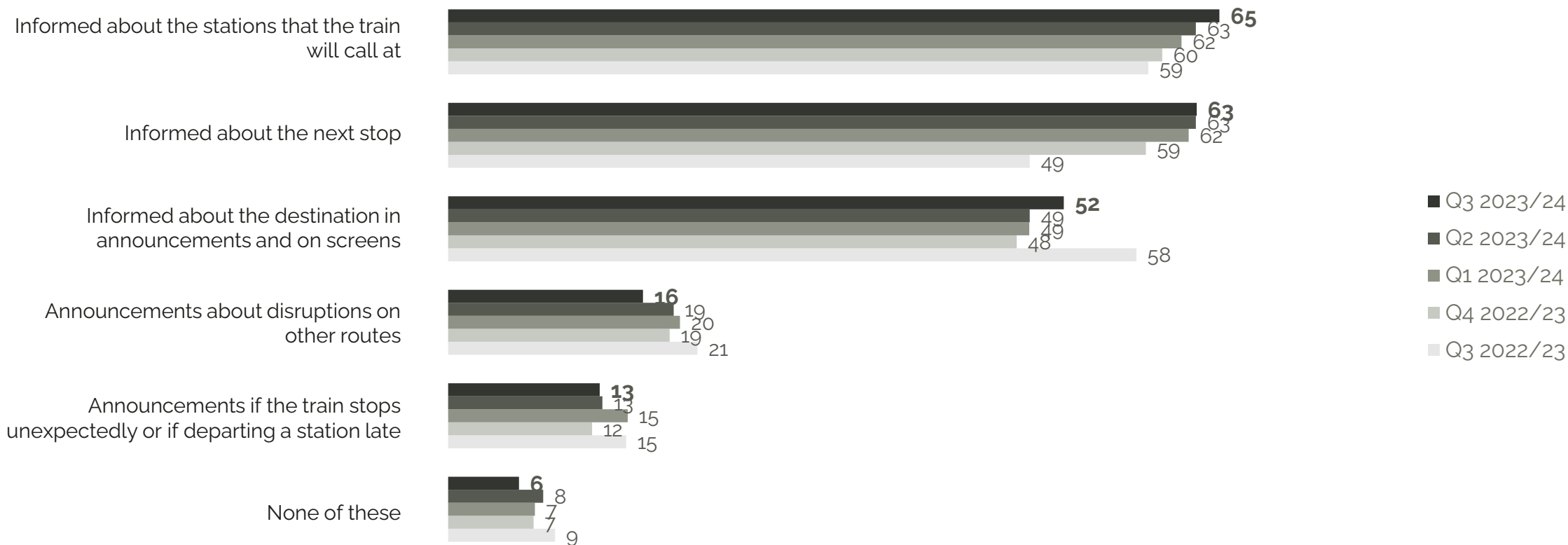
Announcements on board the train (%)



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 the previous quarter, fewer are informed about the disruptions, unexpected stops or late departures in announcements or on screens.

Information provided when on board the train (%)





At destination/ interchange

Rail Delivery Group



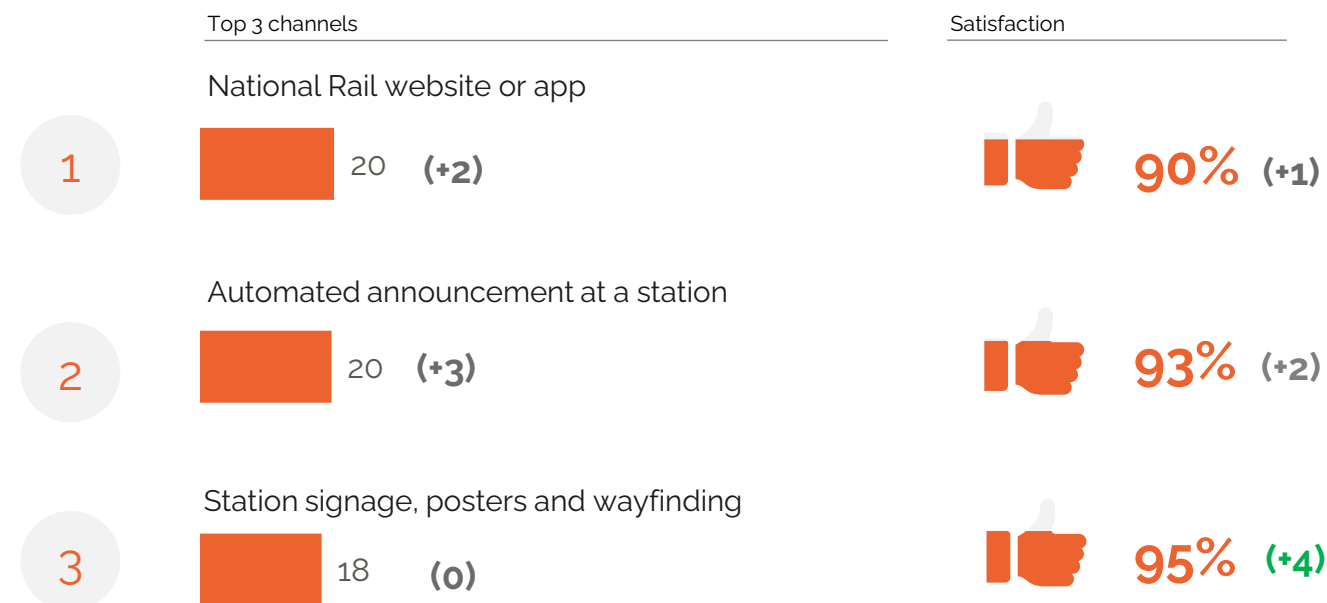
At destination/interchange station – Key satisfaction metrics

At the destination/interchange station, 87% of passengers are satisfied with the information received. The information channel used most at this stage is the National Rail website or app, followed by automated announcements and the station signage, posters and way, all of which have a similar usage of between 18-20%. Passengers continue to be very positive about these channels for receiving information.

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



Top 3 channels used and their satisfaction (%):



Information provided following the rail journey (%)

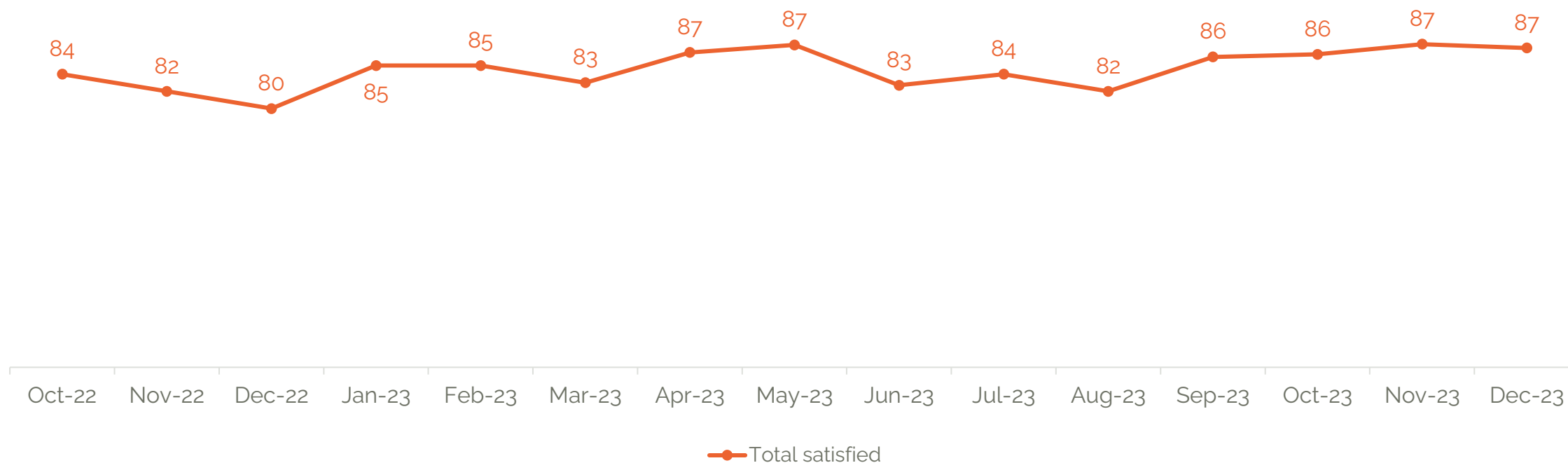


Overall, how satisfied were you with the information provided about your rail journey when at the intermediary and/or destination station? Oct-Dec 23 (2274) Which of the following information channels did you utilise when at the intermediary or destination station? How satisfied were you with the information that was provided on the channels you used when at the intermediary and destination station? (excl DK) Oct-Dec 23 (2436) Following your rail journey, were you provided with any of the following information...? Oct-Dec 23 (2436)

Overall satisfaction with information provided when at destination/interchange station

Satisfaction in information provision looks to have stabilised between October 2023 and December 2023.

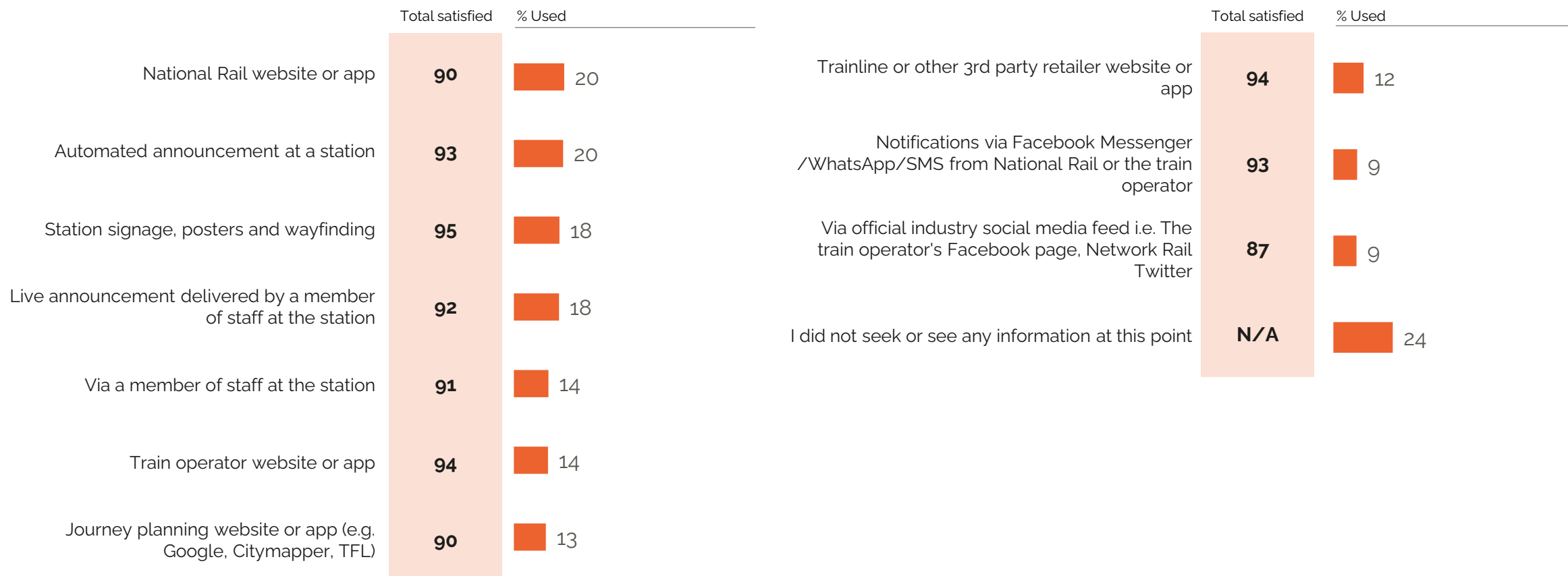
Overall satisfaction with information provided when at destination/interchange station – trended (%)



Information channels used and their satisfaction

The destination/interchange station continues to be a stage where passengers use a variety of information channels. Most channels have a high level of satisfaction in their information provision.

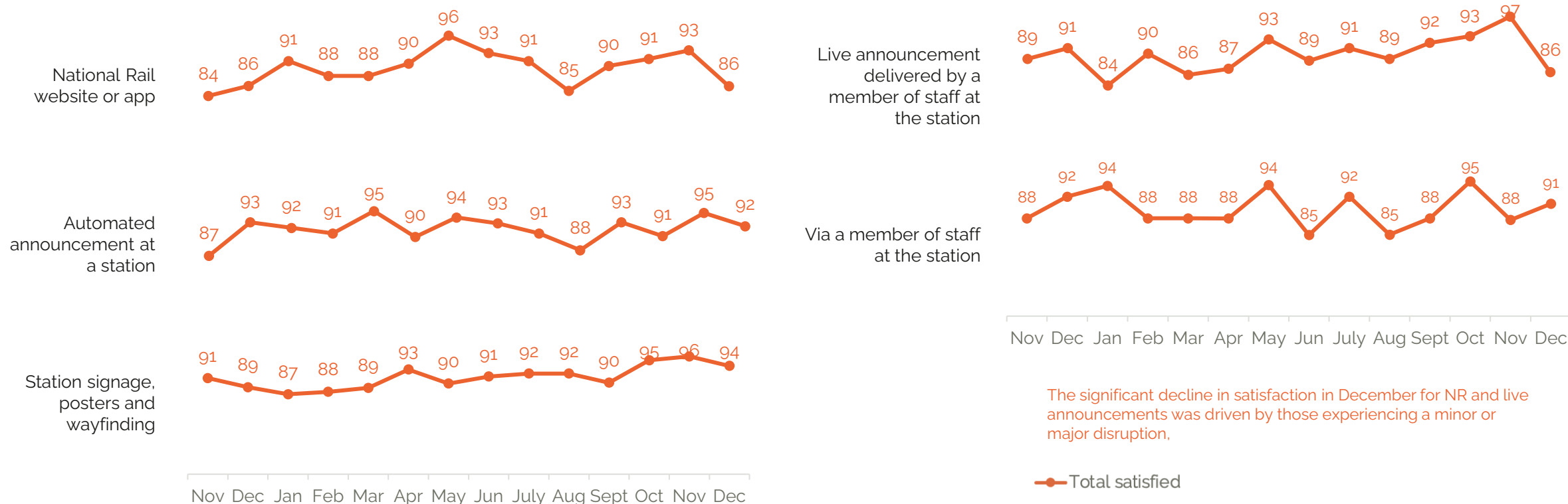
Information channels used and satisfaction with each when at destination/interchange station (%)



Satisfaction with information channels

Focusing on the top 5 used, station signage and automated announcements generally perform very well. The NR website or app and live announcements did not perform as highly this December, mirroring trends seen at other stages surrounding disrupted passengers' experience with information provision. Acquiring information from a staff member continues to be variable by month.

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/June/July/Aug/Sep/Oct/Nov/Dec 23 – National Rail website or app (143/170/138/130/147/121/149/163/145/165/153/167/160/175), Automated announcement (118/127/128/118/152/117/141/150/142/119/152/155/158/165), Station signage, posters and wayfinding (113/117/130/110/144/135/133/164/140/136/159/171/151/135), Live announcement (128/113/112/121/120/105/133/.160/142/132/128/156/151/158), Via a member of staff at the station (97/99/92/98/100/91/89/130/104/105/117/108/103/127).



After journey

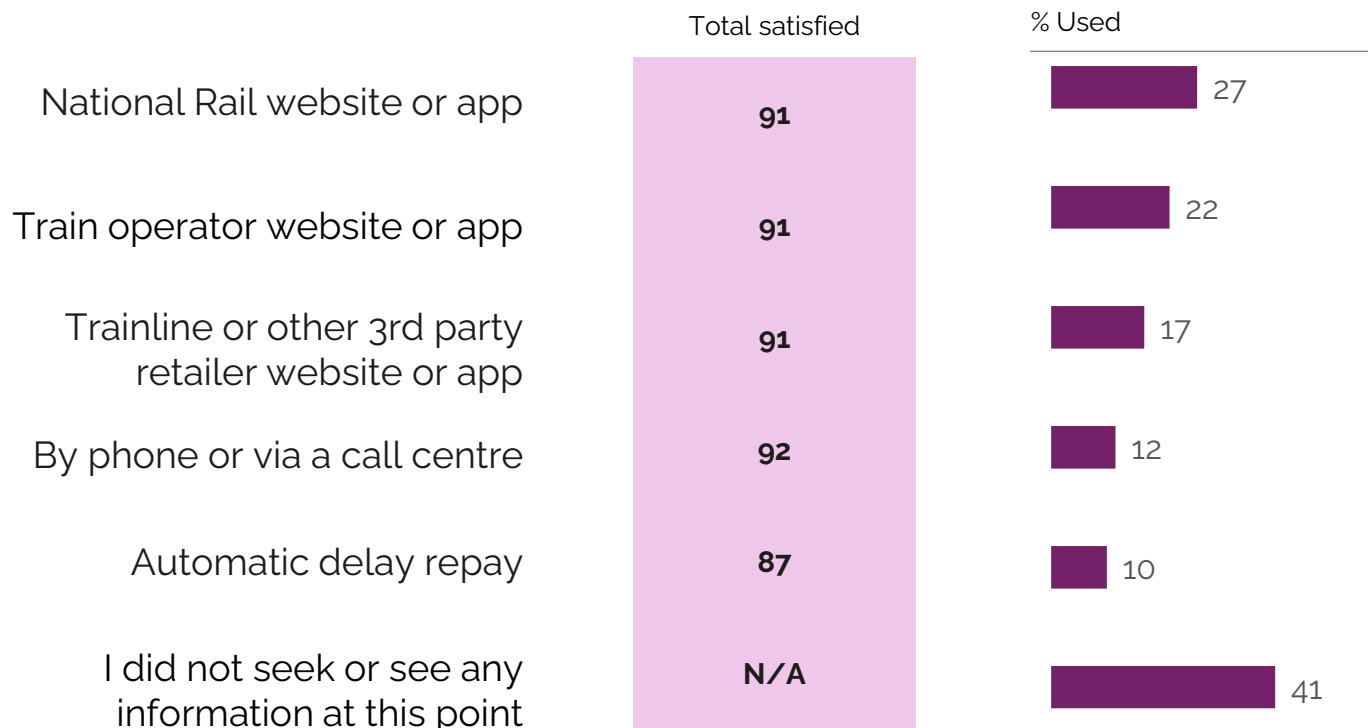
Rail Delivery Group



Information channels used and their satisfaction

After finishing their journey, 2 in 5 of passengers do not actively seek or encounter information regarding their trip. 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. At this stage passengers are very satisfied with the channels they use.

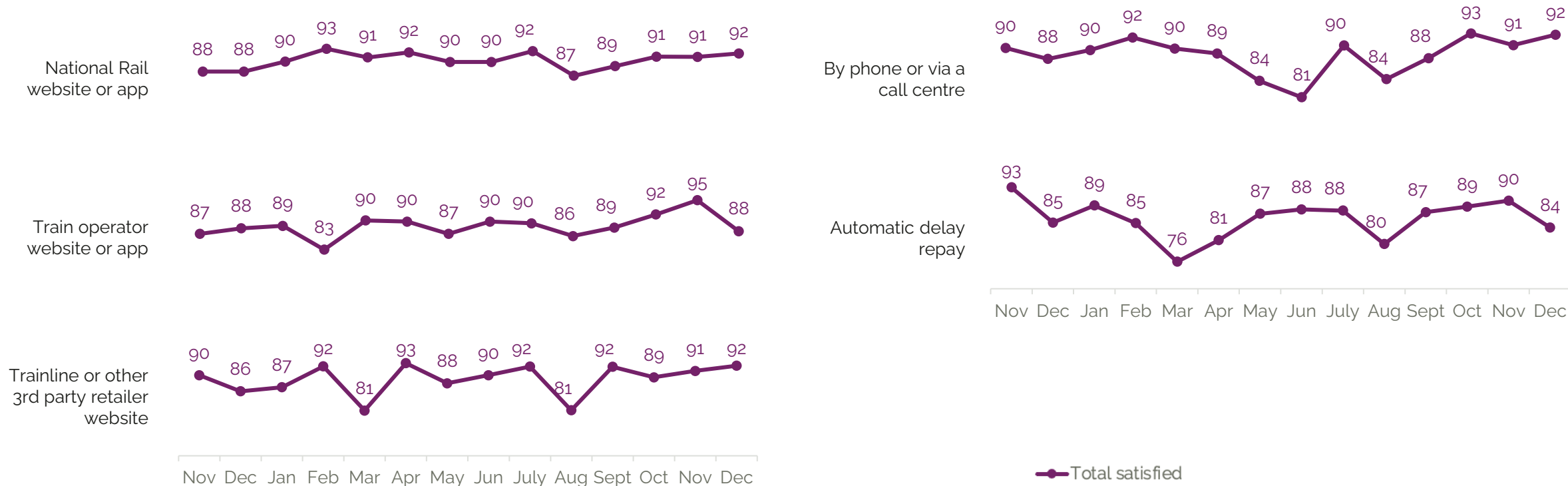
Information channels used and satisfaction with each after the journey (%)



Satisfaction with information channels

Looking at the trended data for information channels after the journey, National Rail and Trainline remain stable in their satisfaction scores. By phone or via a call centre continues to recover after reaching their lowest point in June. TOC apps or websites and automatic delay repay are most impacted in December, linked to the reduced satisfaction among the disrupted during this month.

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/ July/Aug/Sep/Oct/Nov/Dec 23 - National Rail website or app (207/176/193/183/192/241/201/210/186/209/246/249), Train operator website or app (175/143/143/155/172/202/184/188/146/167/187/191), Trainline or 3rd party retailer website (156/146/137/145/162/178/148/150/157/139/153/169), By phone or via a call centre (98/70/80/91/86/120/92/100/91/85/115/124), Automatic delay repay (78/75/74/73/77/88/89/86/68/69/86/116).



Experience with disruptions

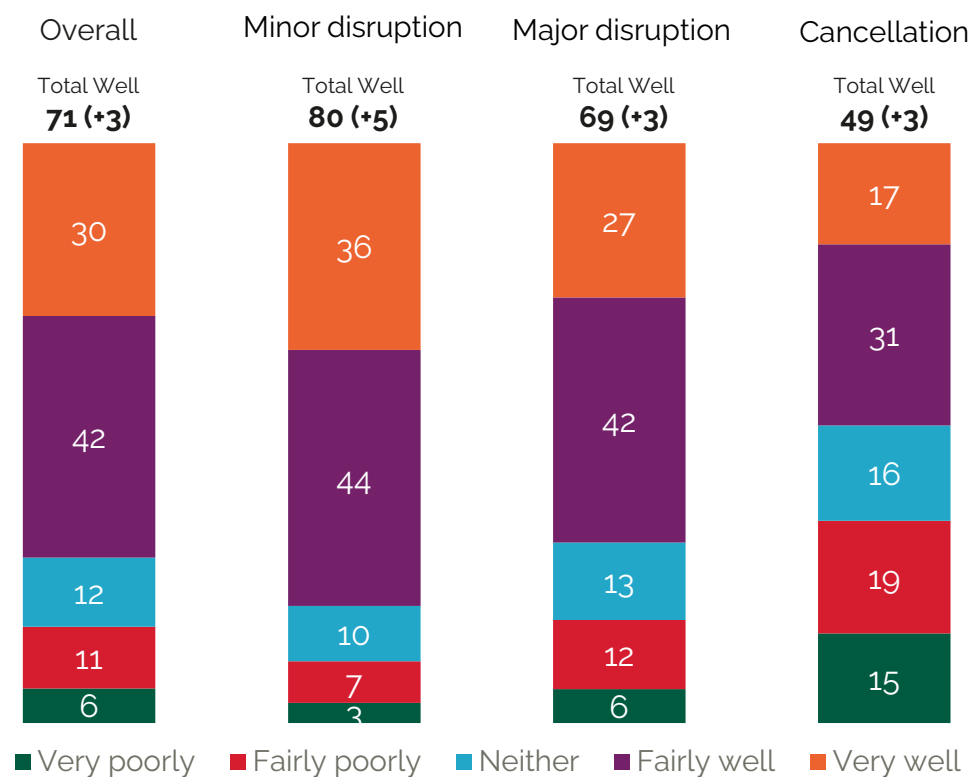
Rail Delivery Group



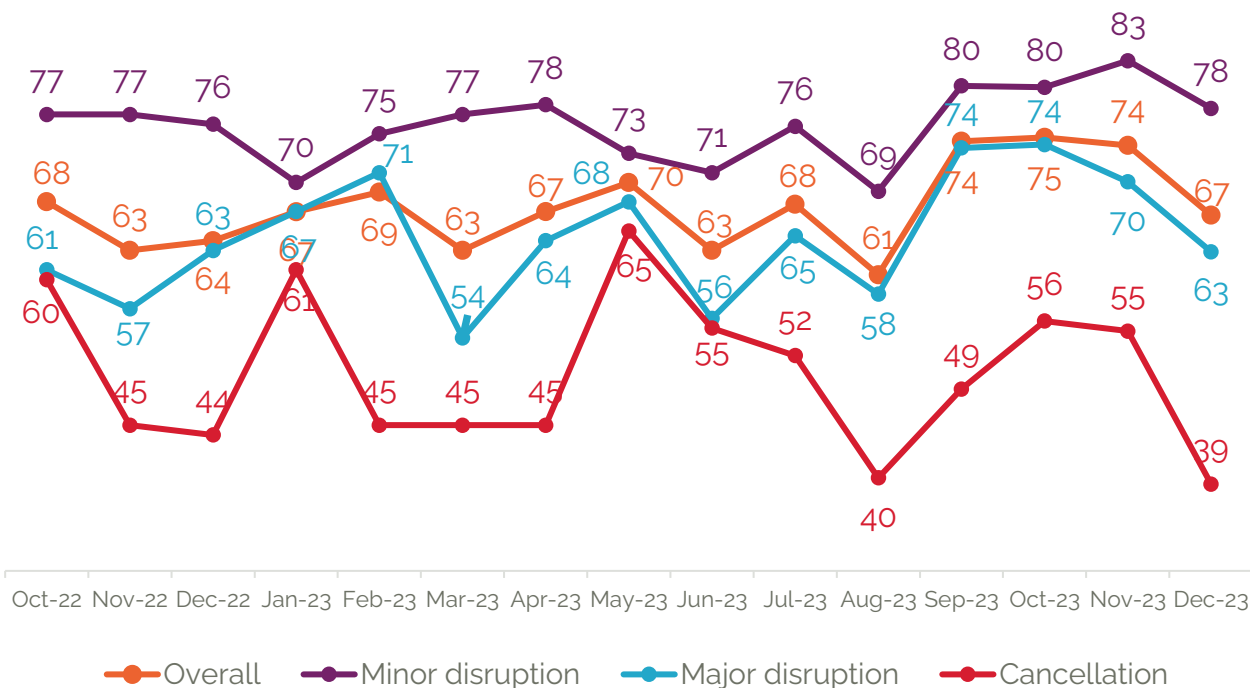
Overall rating of information provided about the delay (1/2)

Overall, 7 in 10 customers rated that the TOC had kept them fairly or well informed about the delay. Since the drop in rating seen in August, overall ratings on of how well people were informed about the delay had recovered amongst all passenger types, however ratings dropped during December. This was especially true amongst cancelled passenger, reaching the lowest point in the past year.

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



Total Well Trend



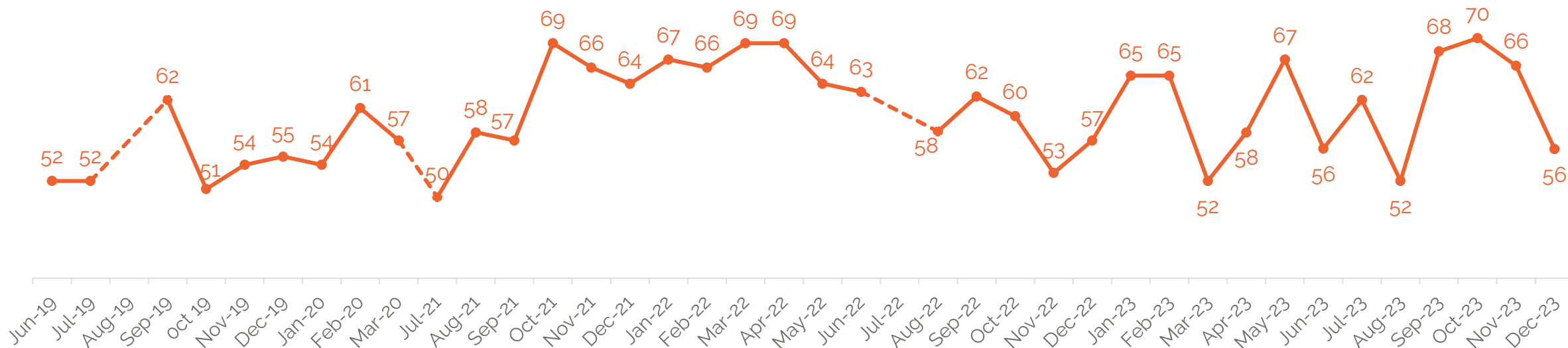
Overall, how well do you think the train company kept you informed about the delay or cancellation? (excl DK) Oct-Dec 23 (1034/483/412/139) Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/June/July/Aug/Sep/Oct/Nov/Dec 23 – Overall (351/345/433/363/297/365/289/299/389/321/365/347/346/314/374); Disruption: Minor (141/146/168/145/126/154/126/299/168/138/186/169/161/143/179), Major (182/144/182/134/131/163/117/112/168/136/125/135/138/129/145), Cancellation (59/55/83/84/40/48/46/37/53/47/54/43/47/42/50)

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

Focusing solely on cancelled and majorly disrupted passengers, we see a similar trend in the variability in the rating of information for major disrupted or cancelled passengers seen before. The sharp drop seen in December, probably coincides with the strikes during the start of the month and weather-related disruptions and cancellations, e.g. Storm Pia causing major disruption to trains travelling to Euston on 21st December, and Storm Gerrit on 27th December.

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




























Total Well Trend



Overall rating of information provided about the delay

Exploring the rating of information by TOC shows there are some TOCs that are performing better this quarter – London Overground and Greater Anglia scoring highest.

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

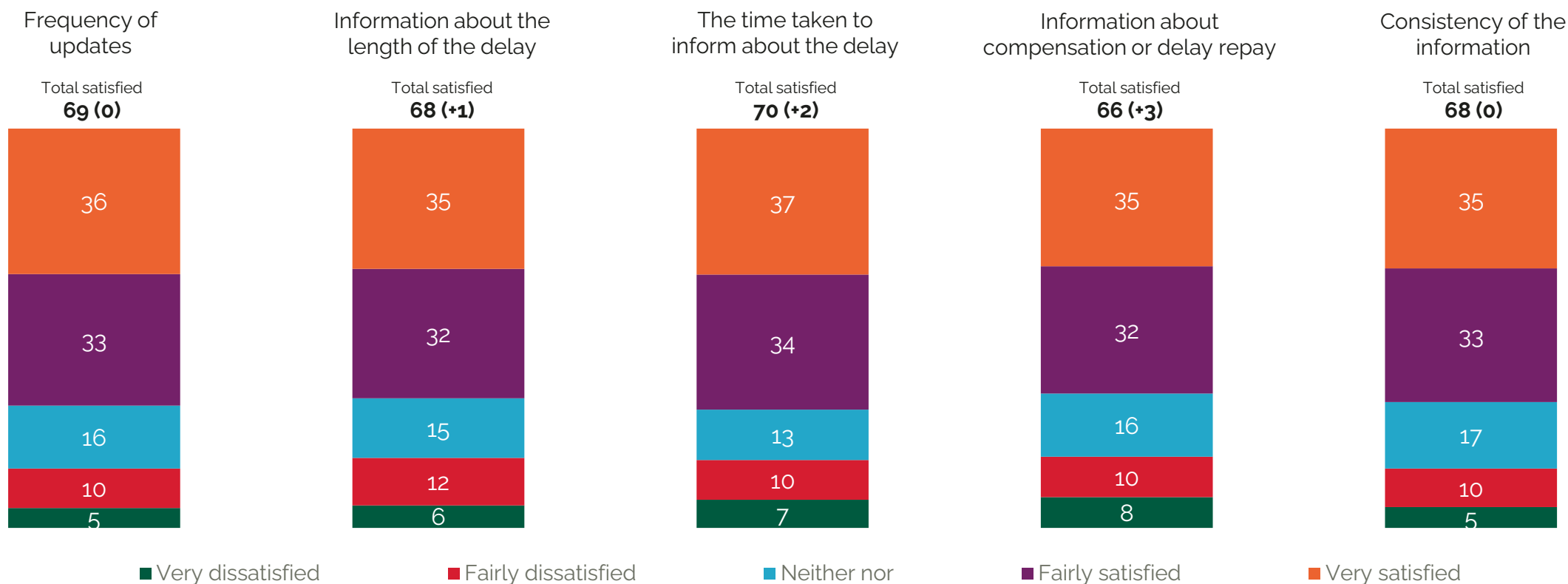
	Total Well	Share of disruption type %				Total Well	Share of disruption type %				Total Well	Share of disruption type %		
		Minor	Major	None			Minor	Major	None			Minor	Major	None
	*55 (+10)	14 (-2)	28 (+10)	58 (-8)		*83 (+4)	32 (-8)	16 (-5)	52 (+12)		58 (+3)	17 (-3)	21 (0)	62 (+3)
	*68 (-6)	18 (-5)	24 (+4)	58 (+1)		*67 (0)	12 (+2)	23 (+3)	65 (-5)		**	9 (-3)	14 (+1)	77 (+2)
	**	10 (-3)	22 (-3)	68 (+5)		**	Base size too low				66 (-6)	25 (+6)	16 (-3)	59 (-2)
	76 (+11)	28 (+4)	22 (-3)	49 (-2)		**	21 (**)	32 (**)	47 (**)		76 (+13)	24 (+6)	26 (+6)	50 (-12)
	*68 (+5)	14 (-3)	17 (-6)	69 (+9)		*74 (-1)	16 (-5)	22 (-1)	62 (+6)		63 (+7)	16 (0)	26 (+10)	58 (-10)
	75 (0)	29 (+1)	19 (0)	52 (-1)		*84 (+9)	23 (+1)	23 (-8)	55 (+9)		71 (+15)	23 (+6)	20 (+3)	58 (-8)
	**	Base size too low				79 (-1)	25 (-2)	23 (-1)	52 (+3)		*57 (-2)	14 (-6)	17 (-12)	69 (+18)
	**	Base size too low				**	Base size too low				*52 (-4)	9 (-2)	28 (+2)	63 (0)
	89 (+11)	20 (+3)	24 (+7)	55 (-12)		*70 (-10)	16 (+8)	19 (-3)	65 (-5)		**	10 (-11)	16 (-3)	74 (+14)

Overall, how well do you think the train company kept you informed about the delay or cancellation? (excl DK Oct-Dec 23 – Overall (1034), Disruption type: Major (555), Minor (486), None (1530).. *Refers to TOCs where the base is below 50. **Refers to TOCs where the base is below 30 and too low to show. CAUTION – some Q3 2022 figures had small bases and so changes may be inflated.

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.

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

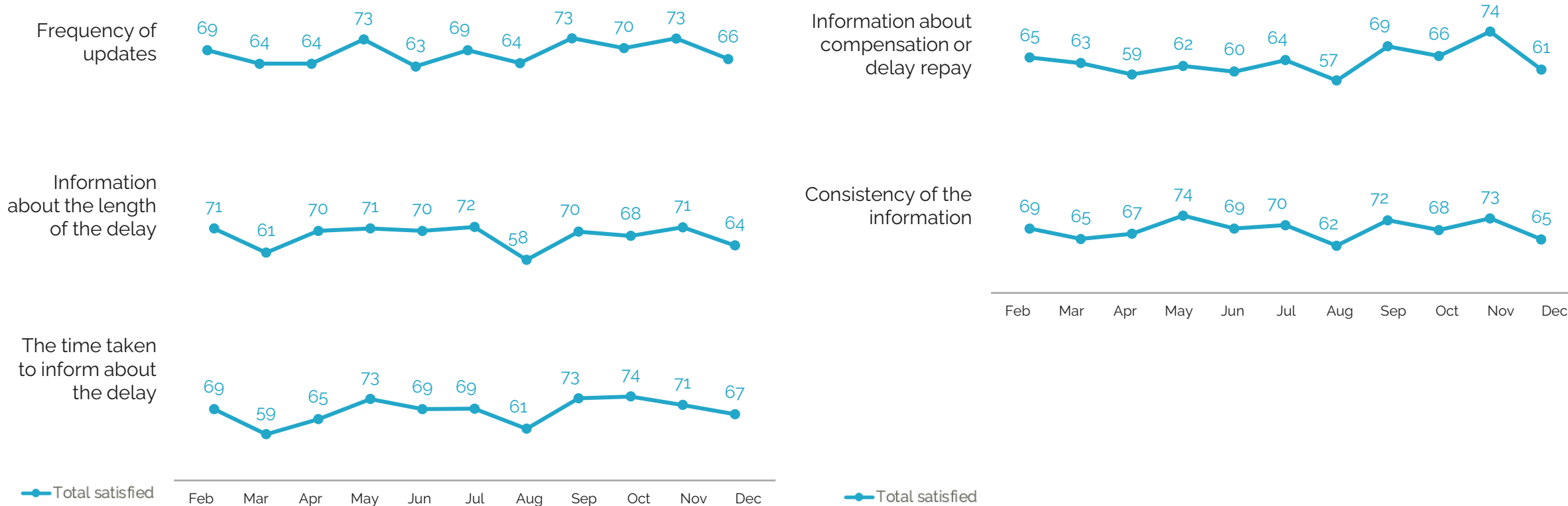


How satisfied were you with the following aspects of the information provided in relation to the delay or cancellation you experienced during your journey? (excl DK) (Frequency/Length/Time Taken/Compensation/Consistency). Jan-Mar/Apr-Jun/July-Sep/ Oct-Dec 23 (1024/1025/1023/991/1023/979/973/975/952/971/1023/1021/1024/994/1026/1035)

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

This being said, alike the trends established earlier in the report, December saw a decline in the satisfaction with aspects of information provided during a delay. The number of disruptions increased during this period, and the information was not able to cater for all of these experiences – most notably regarding compensation or delay repay.

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

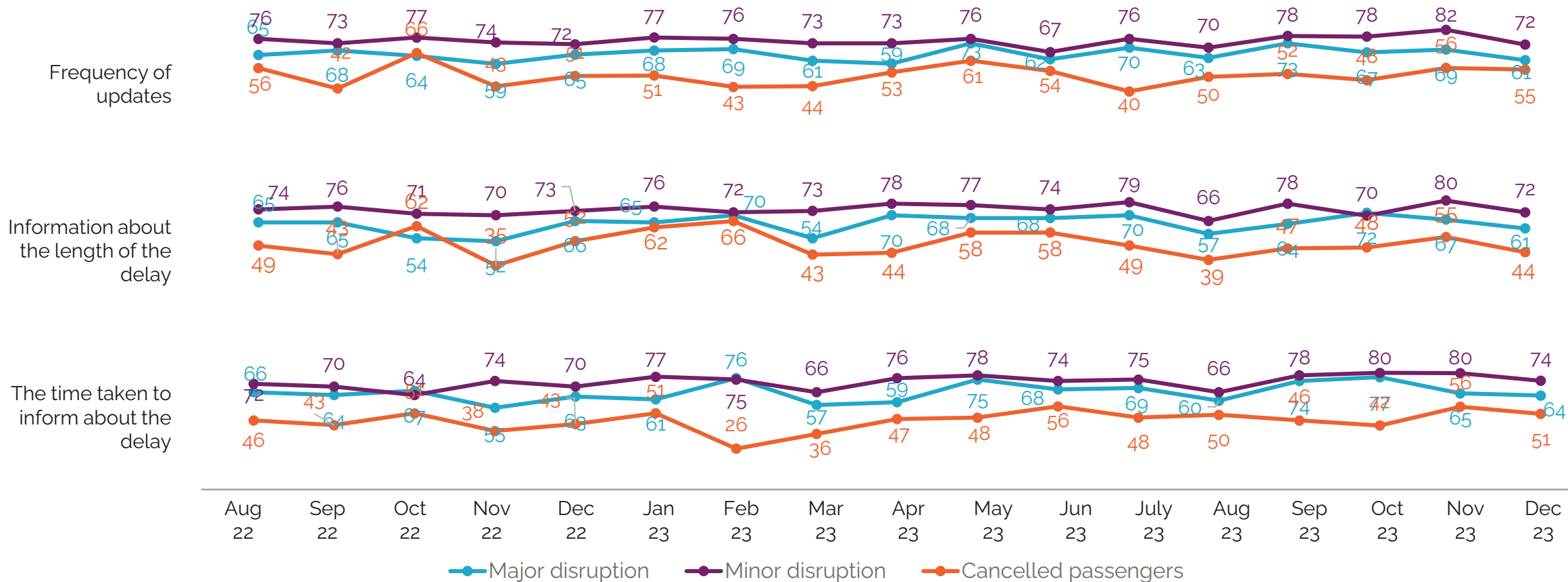


How satisfied were you with the following aspects of the information provided in relation to the delay or cancellation you experienced during your journey? (excl DK) Aug/Sep/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/June/July/Aug/Sep/Oct/Nov/Dec 23 – Frequency of updates (701/361/345/340/433/359/301/364/291/299/389/216/230/250/347/313/375). Length of delay (696/359/350/342/430/362/299/364/289/295/389/224/217/238/345/312/375). Time taken (697/366/350/342/431/360/299/364/287/300/388/213/220/242/346/313/376). Compensation (679/352/344/329/414/347/295/349/281/291/380/187/202/229/333/304/365). consistency (698/364/350/341/431/360/300/363/287/297/387/215/231/246/347/313/373)

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

Tracking the aspects of information provided during a delay highlights areas that could have been better for each disruption type. For cancelled passengers, who rated the information provided lower than other passengers, they were least satisfied with information about the length of the delay in December. For minor and major disruption all aspects of information proved to be less satisfactory in December

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

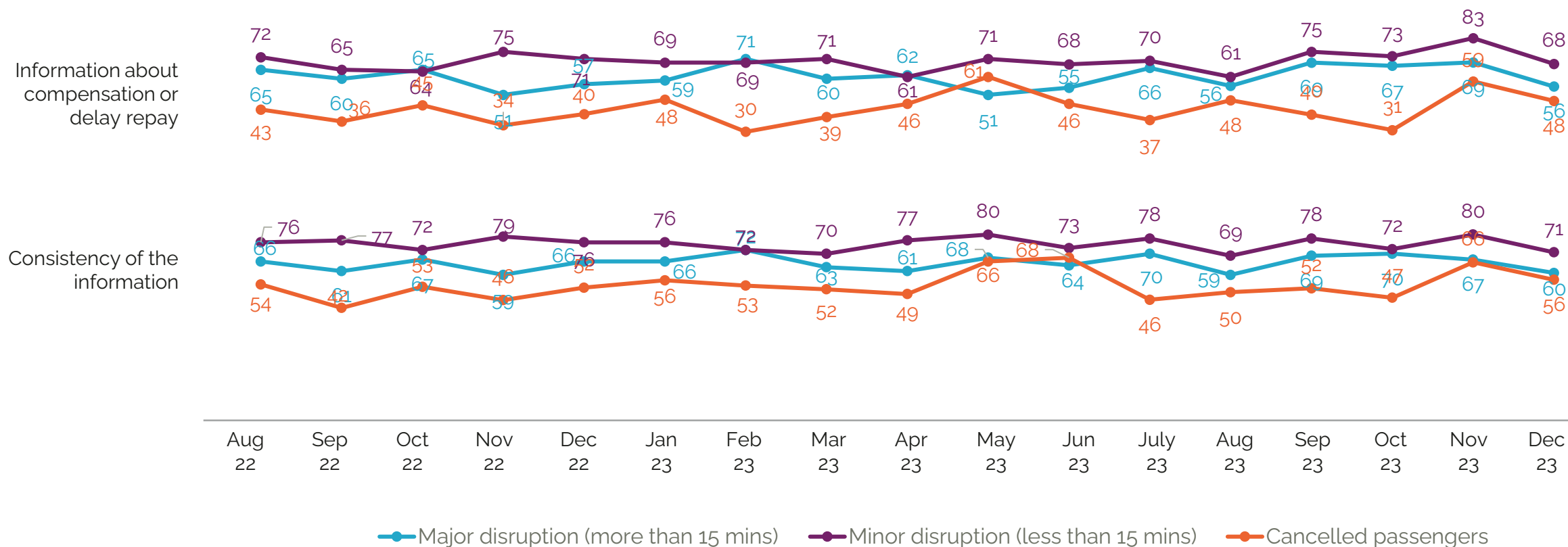


How satisfied were you with the following aspects of the information provided in relation to the delay or cancellation you experienced during your journey? (excl DK) Aug/Sep/Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/Jun/July/Aug/Sep/Oct/Nov/Dec 23 – Frequency of updates (701/361/345/340/433/359/301/364/979/1035), Length of delay (696/359/350/342/430/362/299/364/973/1032), Time taken (697/366/350/342/431/360/299/364/975/1035)

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

November saw an improvement in the information provided for most disrupted passengers, mirroring the upward trend experienced throughout the journey. Though by December, compensation or delay repay was an area where all passengers saw significant declines, highlighting that during more disruption the service needs to be able to support these passengers effectively.

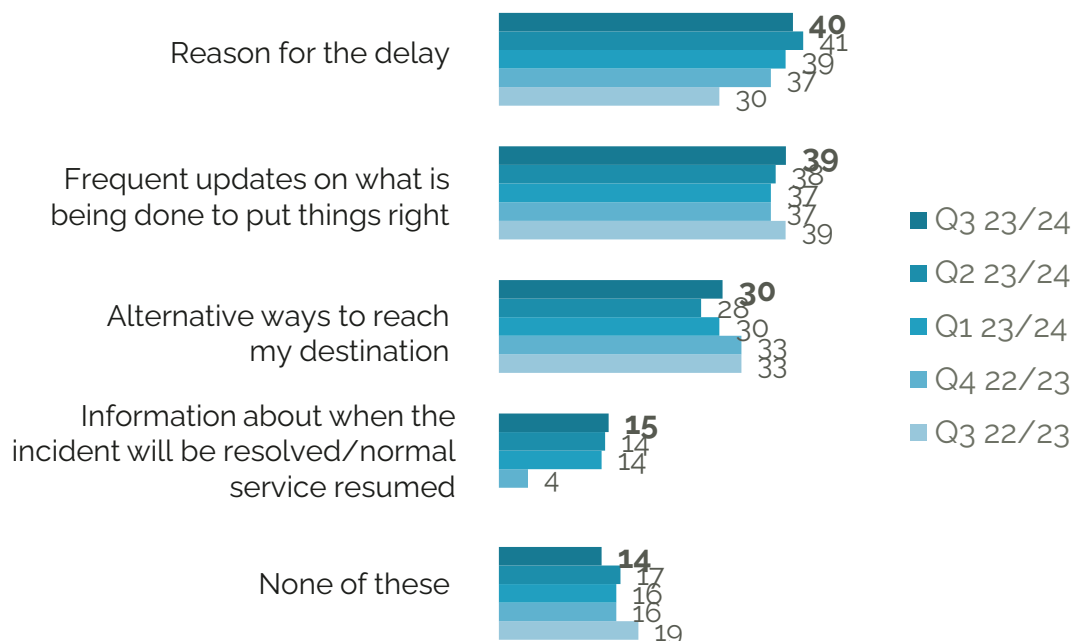
Overall satisfaction with aspects of information provided during the delay – trended (%)



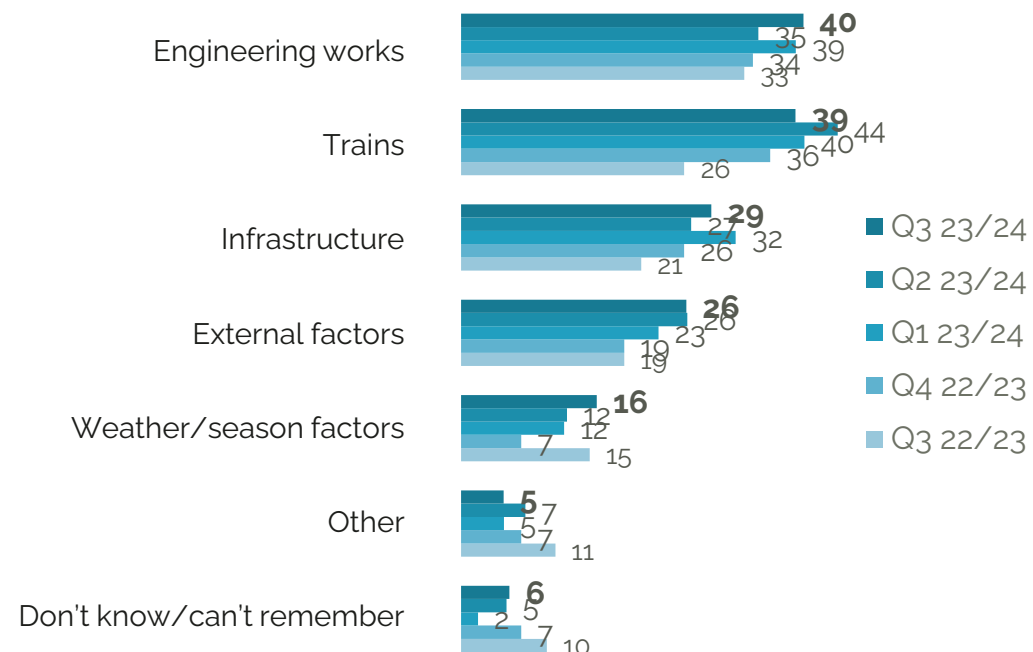
Provision of information during disruption and the reason given

Of the information provided to passengers, the reason for delay and frequent updates are the main types of information provided to disrupted passengers. Engineering works was the biggest disruptor this quarter, followed by issues affecting trains.

Type of information provision during the disruption (%)



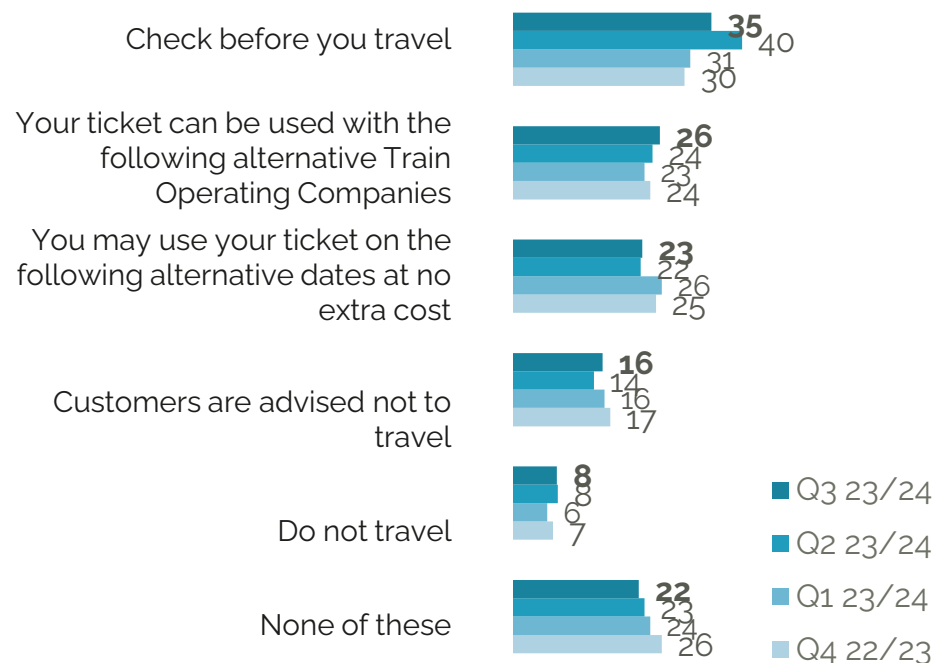
Reasons for the given disruption (%)



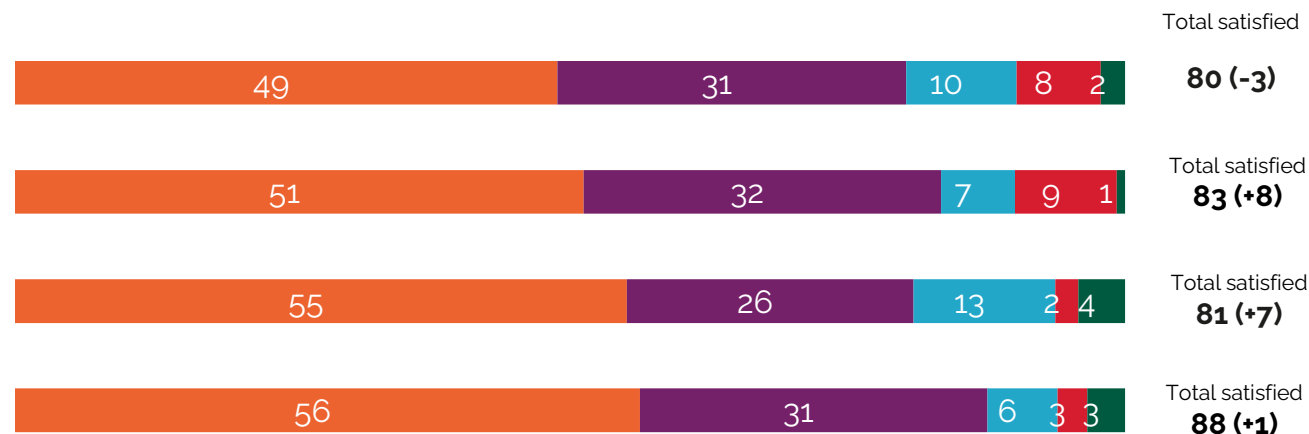
Messages recalled by those experiencing a major disruption

The most common message recalled by those experiencing a major disruption was “check before you travel”, of which 4 in 5 were satisfied with this message. Regarding other messaging, passengers were generally satisfied with the messaging.

Messaging recalled seeing during journey (%)



Satisfied with the following... (%)



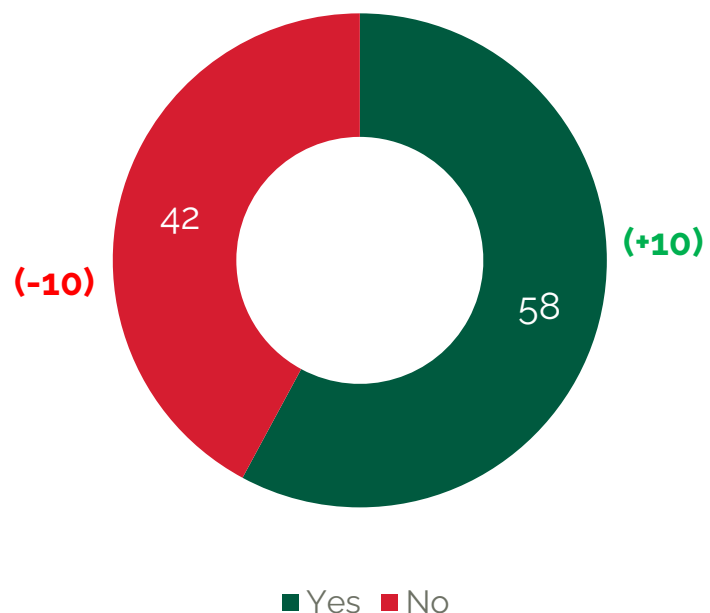
Base too low to show *satisfaction* rating

Very satisfied Fairly satisfied Neither nor Fairly dissatisfied Very dissatisfied

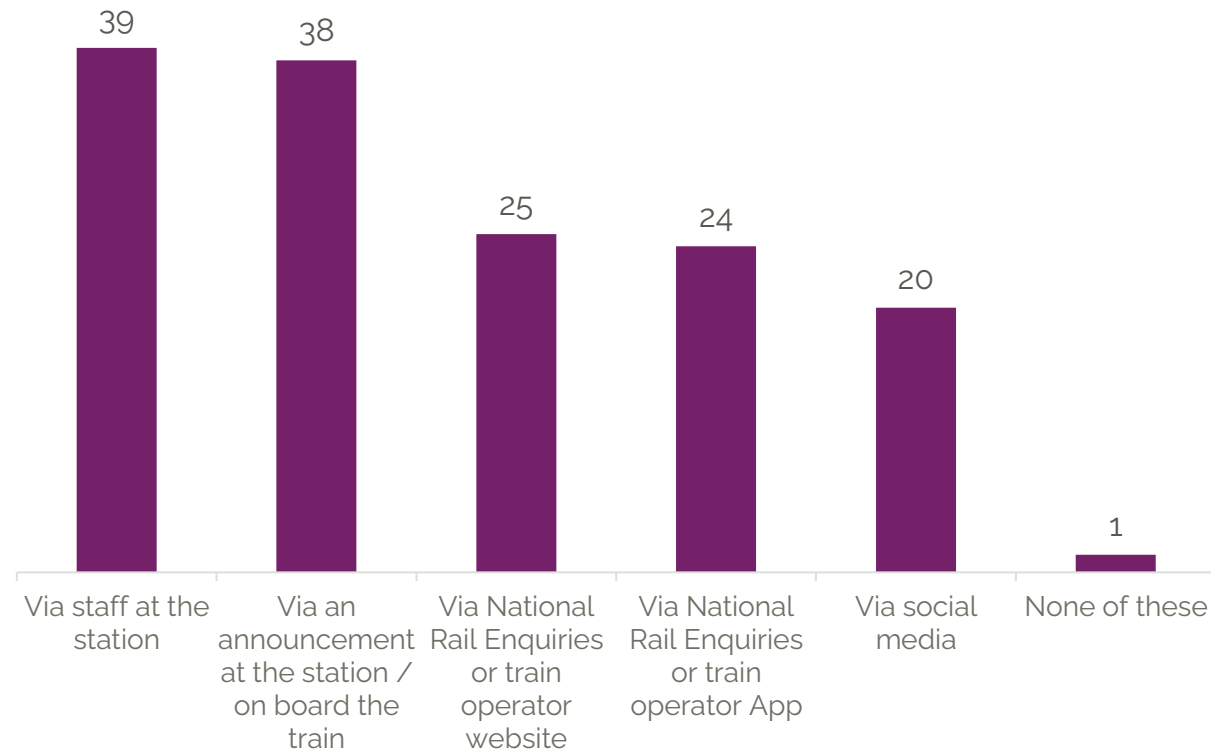
Alternative route information during a major disruption

3 in 5 passengers that were major disrupted received information on alternative routes, a significant improvement on last quarter. The main route for receiving this information was via a member of staff at the station.

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



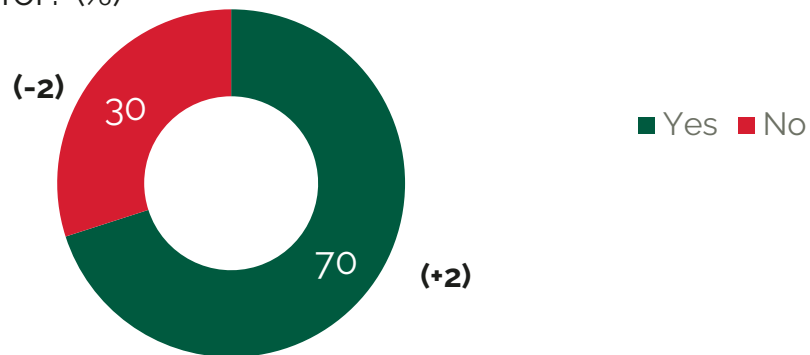
Which channels did they receive this information (%)



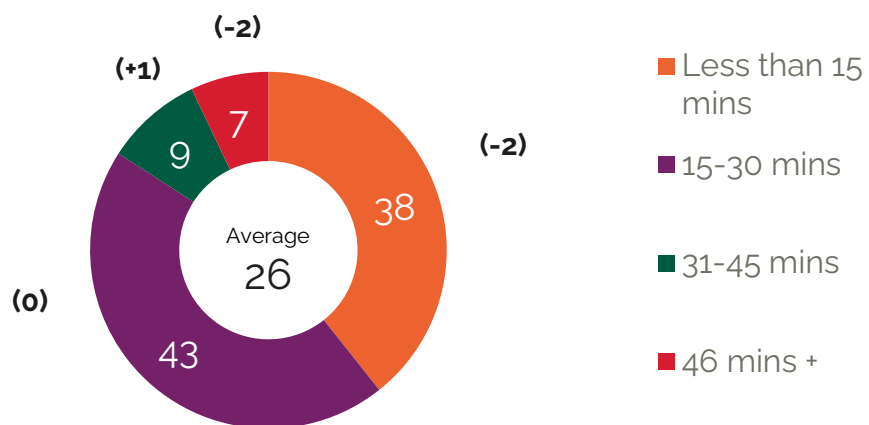
Delay length

7 in 10 disrupted passengers were given an estimate for the length of their delay. For the majority of passengers, the delay was less than 30 minutes, which was most common for leisure and commuting passengers.

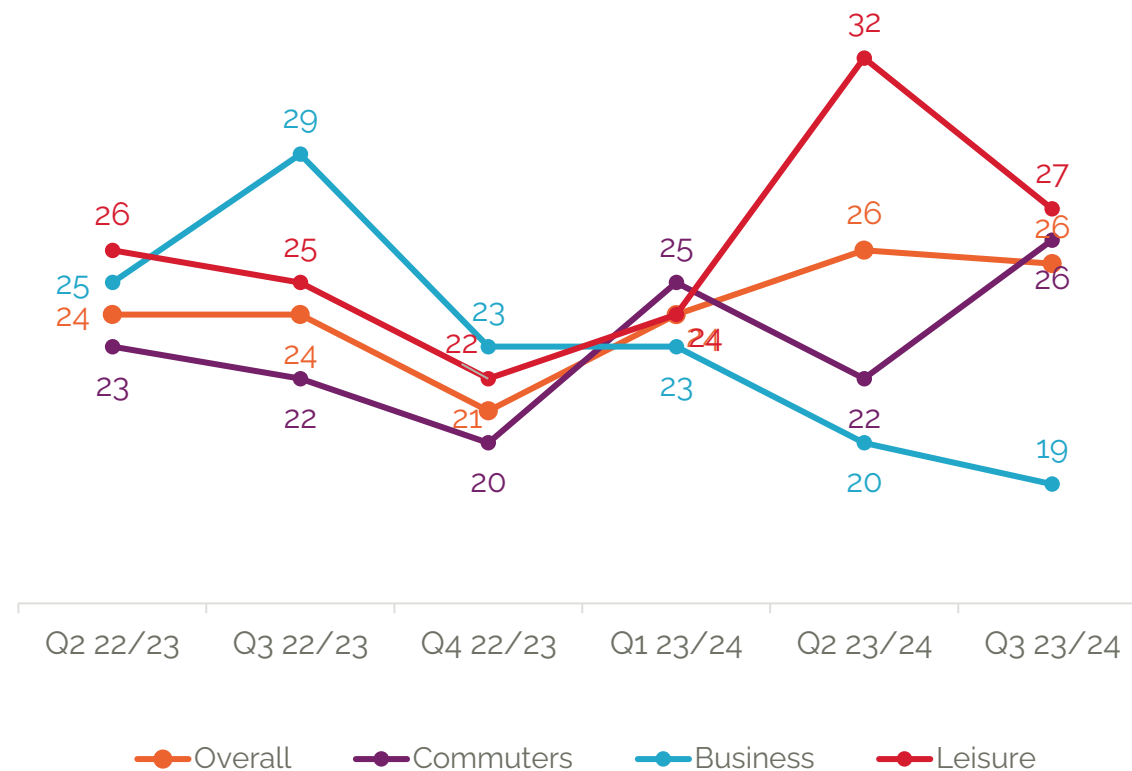
Were you given an estimate for how long the delay will be going on for? (%)



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



How late was the arrival to the destination station trend? (average in minutes)

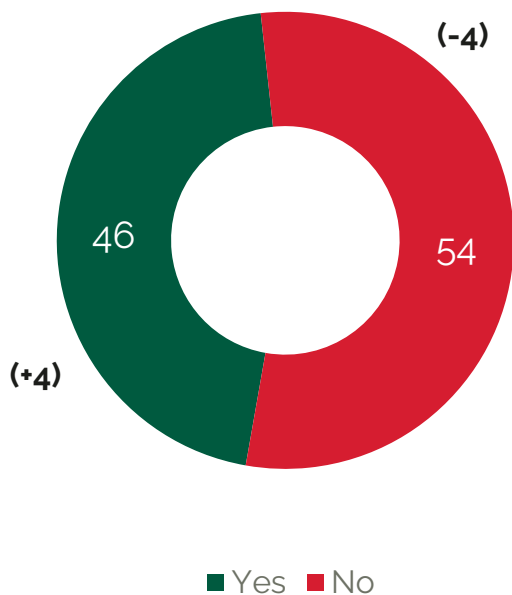


Compensation for delayed journeys

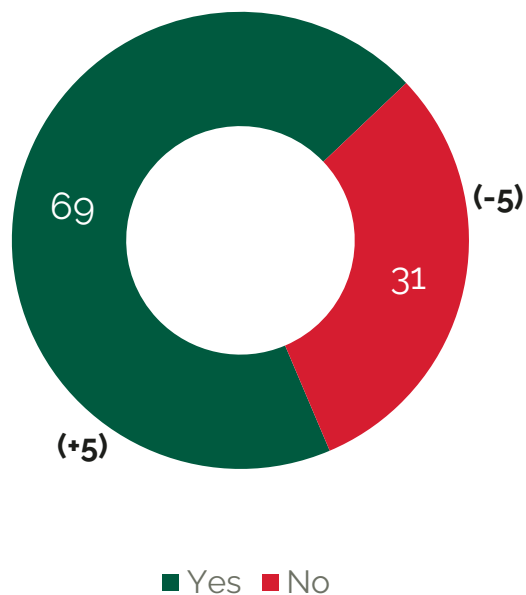
While the majority are aware they could maybe seek compensation regarding their disruption, only 46% suggest they will do so – a figure that has gone up this quarter. It is still an area that could be better at providing information or made to be a smoother process, as just over a quarter of passengers were unaware if they were eligible while nearly another quarter suggest the process is too long or complicated.

Compensation (%)

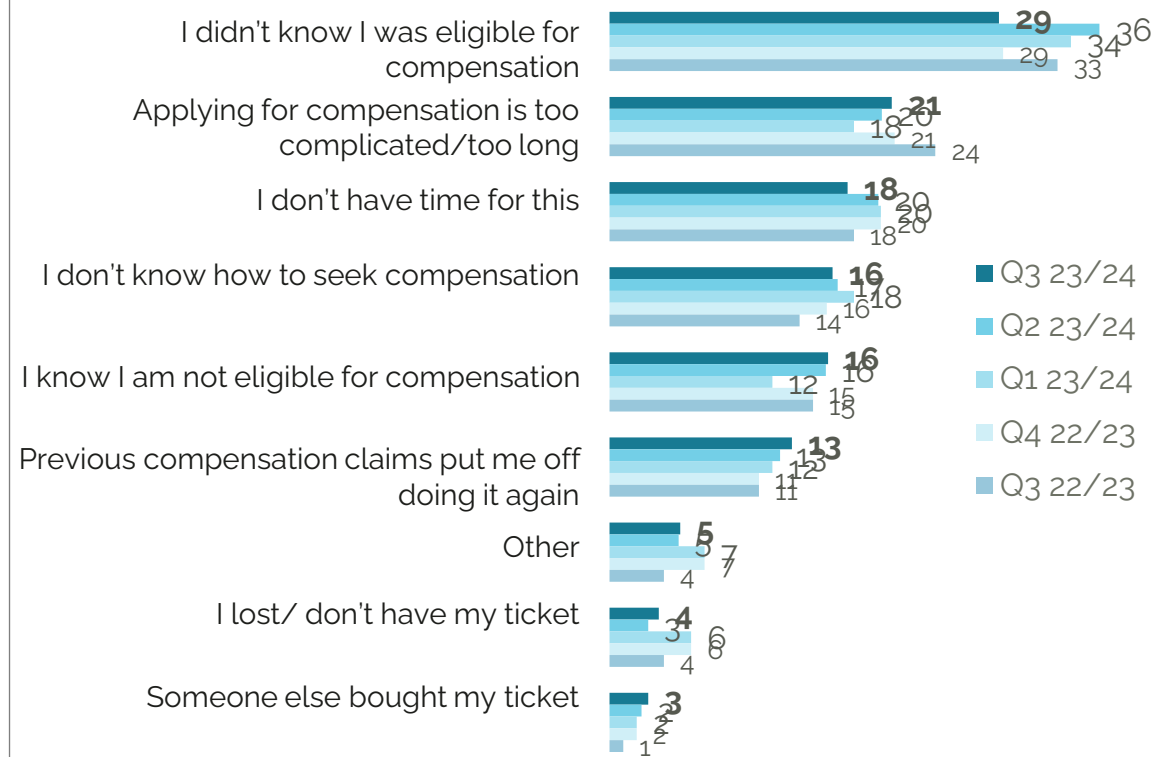
Did you or will you seek compensation from the train company?



Are you aware that you may be able to claim compensation?



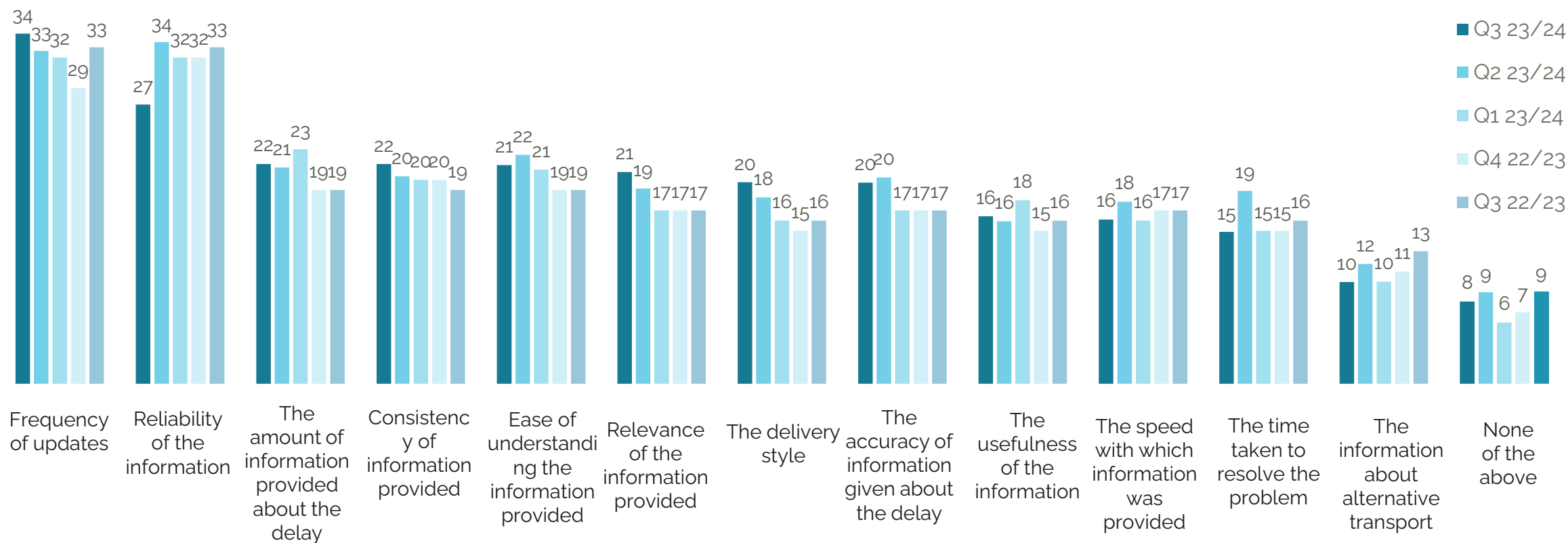
Reasons why they won't claim compensation (%)



Improvements desired for information on disruptions in the future

Frequent updates is more important when handling future disruptions. This comes hand in hand with the timing of information, both of which were reported to be less satisfactory for announcements at the station and on board among the disrupted.

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 service they received from staff, the notices on apps and the real time updates that the apps provide, the screens at the station, and the announcements on board the train. People appreciate being updated on delays whilst on board the train. People also value the response when a train is delayed or cancelled, and any information on alternative transport being provided in its place or routes available.

Best parts of information provision during your journey



I spoke to a station employee to check if my ticket was valid for a different train company as I was unsure. Because of his answer I was able to complete my journey more swiftly with a different train company
Major disruption/LNER/Leisure



There had been a fire at Luton so the train driver explained this and mentioned alternative routes
No disruption/East Midlands Railway/Commuter



The live tracker is brilliant. Up to date courteous messages
Minor disruption/CrossCountry/Leisure



Announcement over tannoy at Brighton station because it suggested quicker route via Hove
Minor disruption/Southern/Leisure



Conductor announcements/ screens at station updated frequently
No disruption/Avanti West Coast/Leisure



The reasons why there was a delay and the things that are being done about it
Major disruption/Southern/Leisure



'There were live updates online and on social media which was helpful
Major disruption/Southeastern/Commuter



The next station to stop at came up regularly
No disruption/CrossCountry/Leisure



That there will be snacks and carbonated drinks to be served while we wait for the train
Minor disruption/Merseyrail/Business

Parts of information provision requiring improvement

Passengers feel the information is shared too late which results in them being unable to make alternative arrangements.. Passengers would also like to know how the delays will affect any of their connecting trains. A number of passengers also suggested making the tannoy system clearer and more timely as many struggle to understand what is being said.

Improvements needed for information provision based on your journey



There could be information videos
No disruption/Northern/Commuter



Show how the delay impacts connecting trains
Major disruption/CrossCountry/Business



Maps on the interior like on the tube
No disruption/Southeastern/Commuter



Make the tannoy system audible!
No disruption/South Western Railway/Commuter



I should have been contacted about the cancellation rather than finding out about it at the station
Major disruption/LNER/Business



There should be announcements before the journey starts
Minor disruption/Merseyrail/Business



Maybe text communication or a device at all stations notifying the delays
Minor disruption/East Midlands Railway/Leisure



Exact reason for delay and how long
Minor disruption/Elizabeth Line/Leisure



Be more open about what's happened, often find more out on social media than from the staff at stations or on train
Major disruption/Southeastern/Leisure

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, such as destination, things to be aware of, and where their journey will be impacted. The tailored information that passengers most appreciated was the live journey times, platform numbers and which connections to take.

How was information tailored to their needs?



It clearly described what actions I should take to reach the destination
Major disruption/Elizabeth Line/Commuter



It warned me that my station has a very low platform and to be careful as I get off.
No disruption/Great Western Railway/Commuter



Telling me if my onward journey will be impacted.
Minor disruption/CrossCountry/Commuter



Let me know the reason why, and how long I would be delayed
Minor disruption/ScotRail/Leisure



From the information I put into the app, it sorted me out with the times of trains, connections and what platforms etc
No disruption/Great Northern/Leisure



It contained everything I needed to know, including departure and arrival times, stations we were stopping at on the way, and other information.
No disruption/Greater Anglia/Leisure



The information was given to me at the platform by a member of the rail staff personally
Major disruption/Hull Trains/Business



I have a disability and they really helped me
Major disruption/Greater Anglia/Business



It suggested other trains for connections
Minor disruption/Avanti West Coast/Business

Information that was not tailored to their needs

While those that thought it was not tailored felt it lacked enough detailed information or was delivered too late for them to be able to make alternative plans when there were delays. They felt it was generalised information given to all passengers and not tailored to the journey in hand.

How was information not tailored to their needs?



I struggle reading so I found it hard to read the information I received

No disruption/Northern/Commuter



Not telling me how crowded the train would be

No disruption/Northern/Leisure



'Some info was not needed for my journey so it can be confusing to know I am looking at the correct times destination on screen.

No disruption/c2c/Leisure



Did not clearly tell me what platform I would be leaving the interchange station from and why.

Minor disruption/Greater Anglia/Leisure



It can be vague so you know there is a delay but not sure how long it will last at times

Minor disruption/Great Northern/Business



'Did not stop at Acton main line which I had to pass and catch an underground train cause the overground had departed so had twenty mins extra added on to my journey with no step free access

Minor disruption/Elizabeth Line/Commuter



'I used the app to see live train times and it said the train was running, but got to the station with 10 minutes to spare and the board said it was cancelled... which left me with an hour wait at a station miles away from anything and with NO facilities.

Major disruption/Greater Anglia/Business



'I had to seek further information from staff and they still didn't know

Major delay/LNER/Business



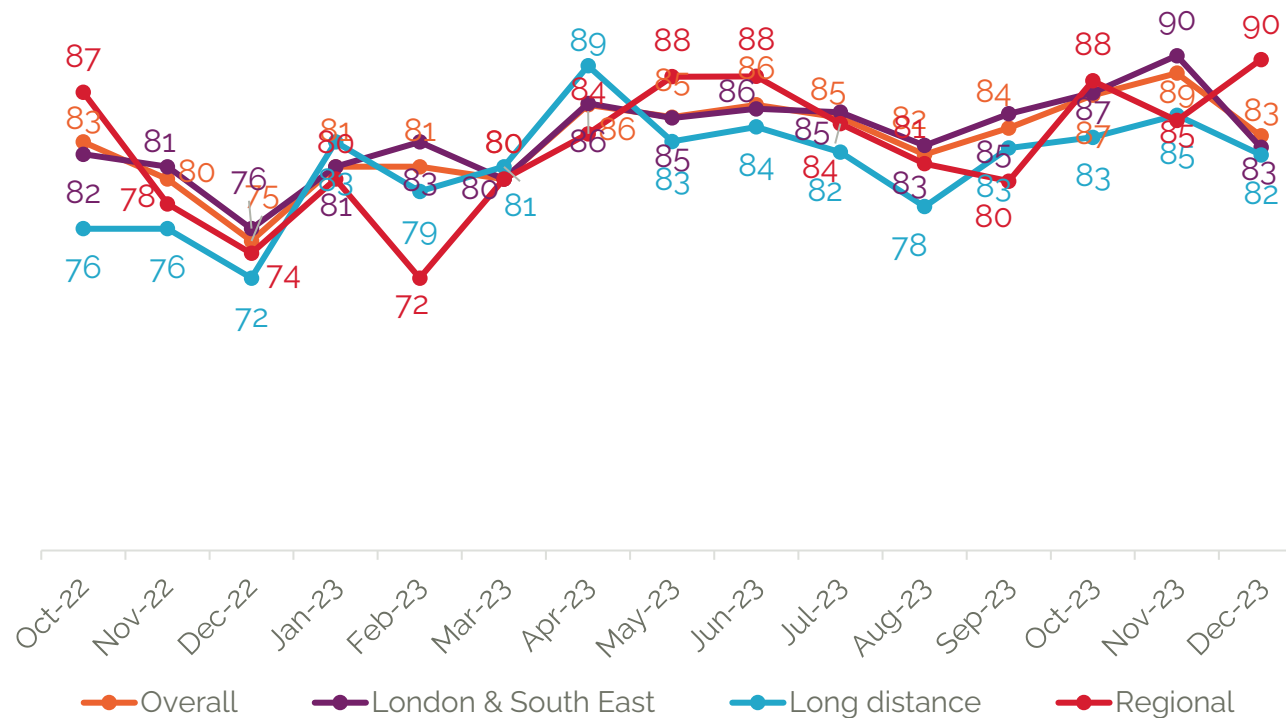
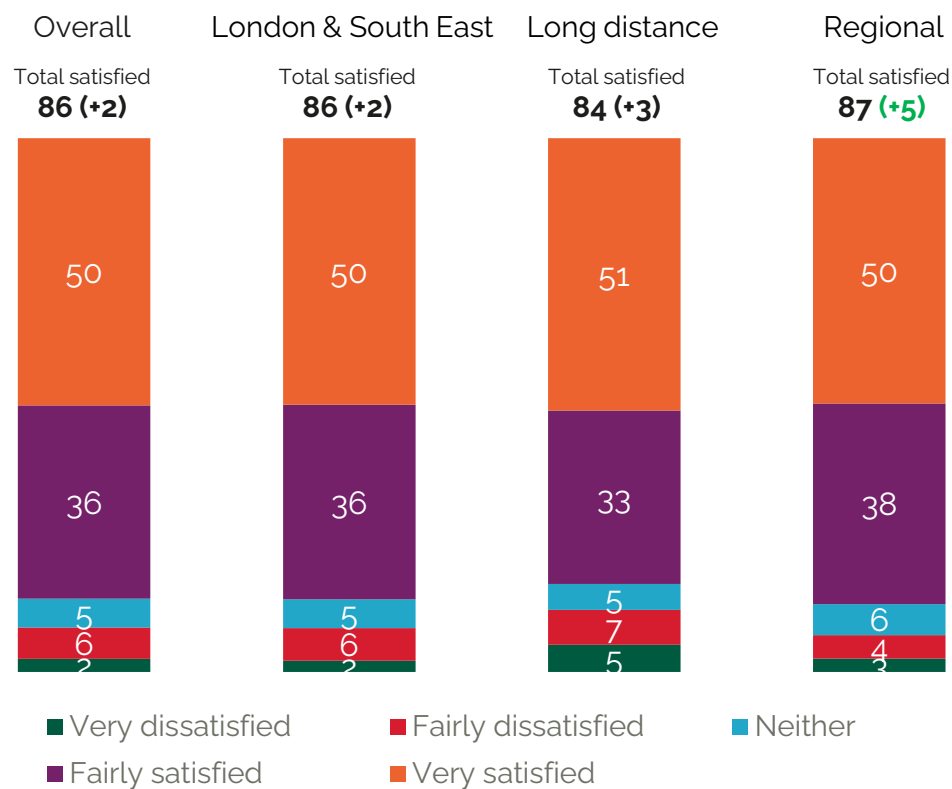
'The timings weren't accurate - I had to wait longer than I anticipated

Major disruption/London Overground/Commuter

Overall satisfaction with information provision

Satisfaction with the information provided increased across all regions, with regional TOCs showing the strongest improvement (following a drop in the last quarter).

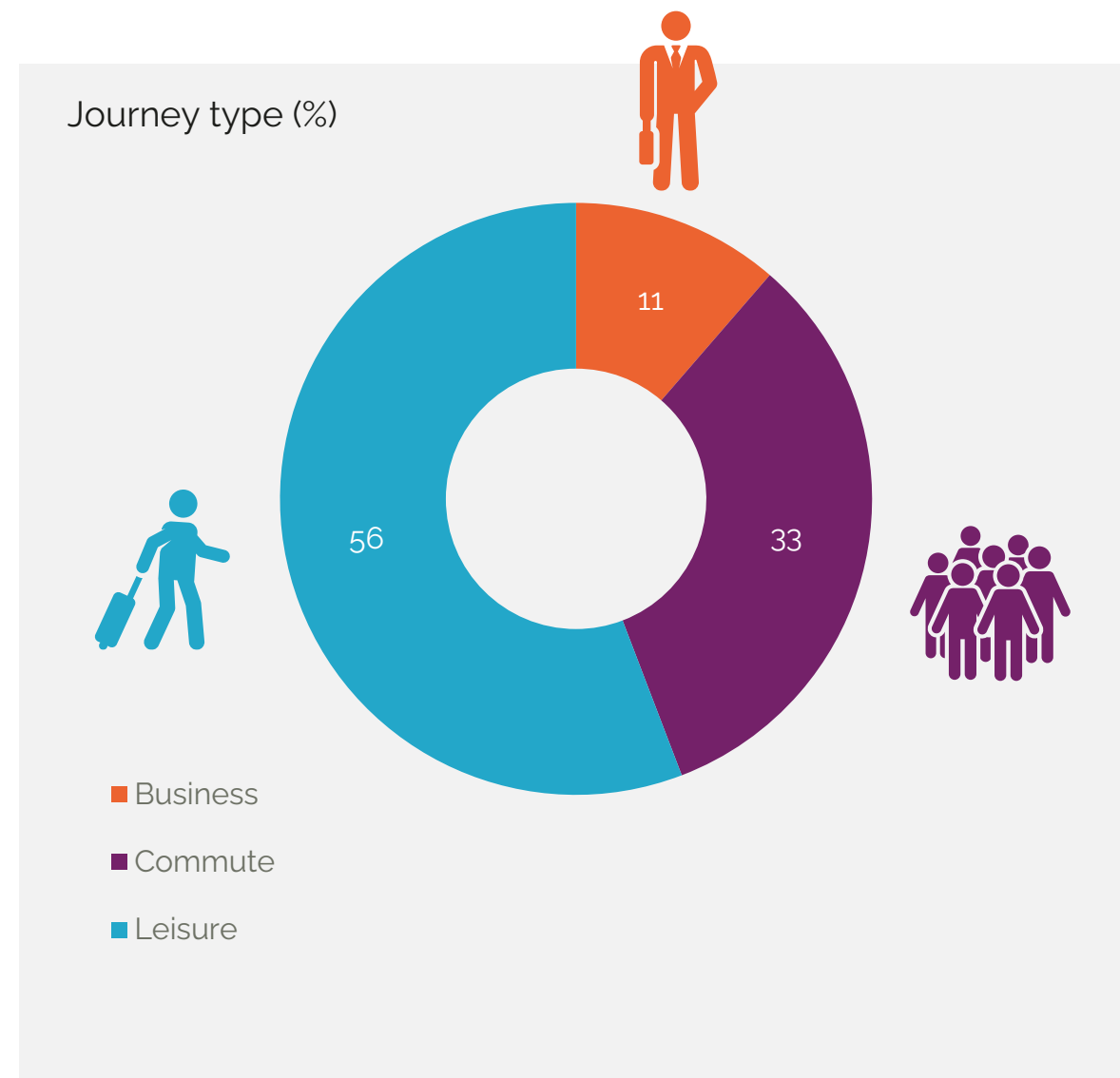
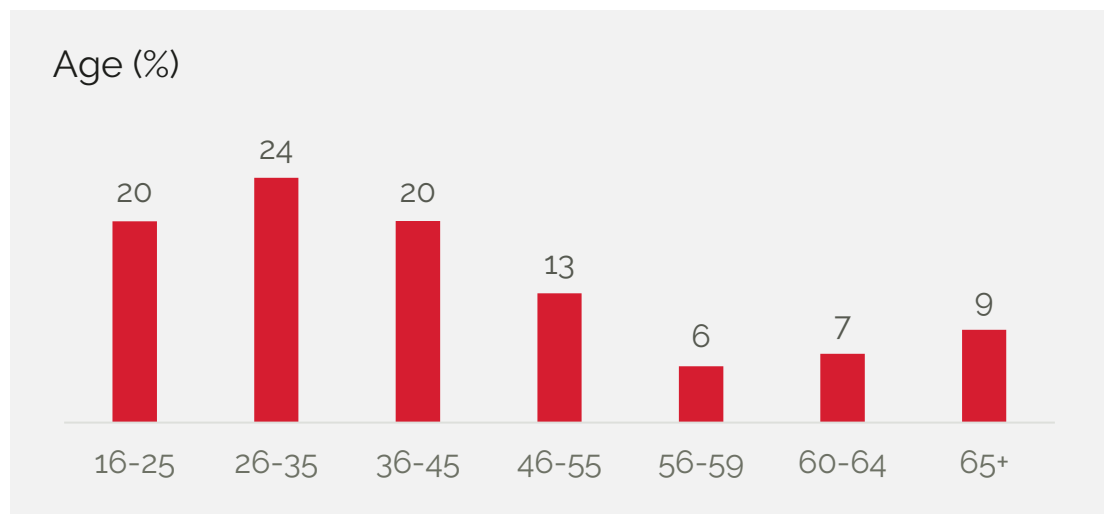
Overall satisfaction with information provision by sectors (%)



Overall, how satisfied were you with the information provided during your journey? (excl DK)

Oct/Nov/Dec 22/Jan/Feb/Mar/Apr/May/June/July/Aug/Sep/Oct/Nov/Dec 23 – Overall (852/834/870/694/590/710/811/786/1037/854/858/847/851/848/853), London + SE (488/475/503/392/326/374/464/439/589/503/499/487/480/470/513), Long Distance (197/179/178/152/143/180/176/178/218/182/181/185/188/184/184), Regional (165/180/189/150/121/154/170/168/228/169/178/175/183/194/154)

Demographics



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[Return to contents](#)

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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