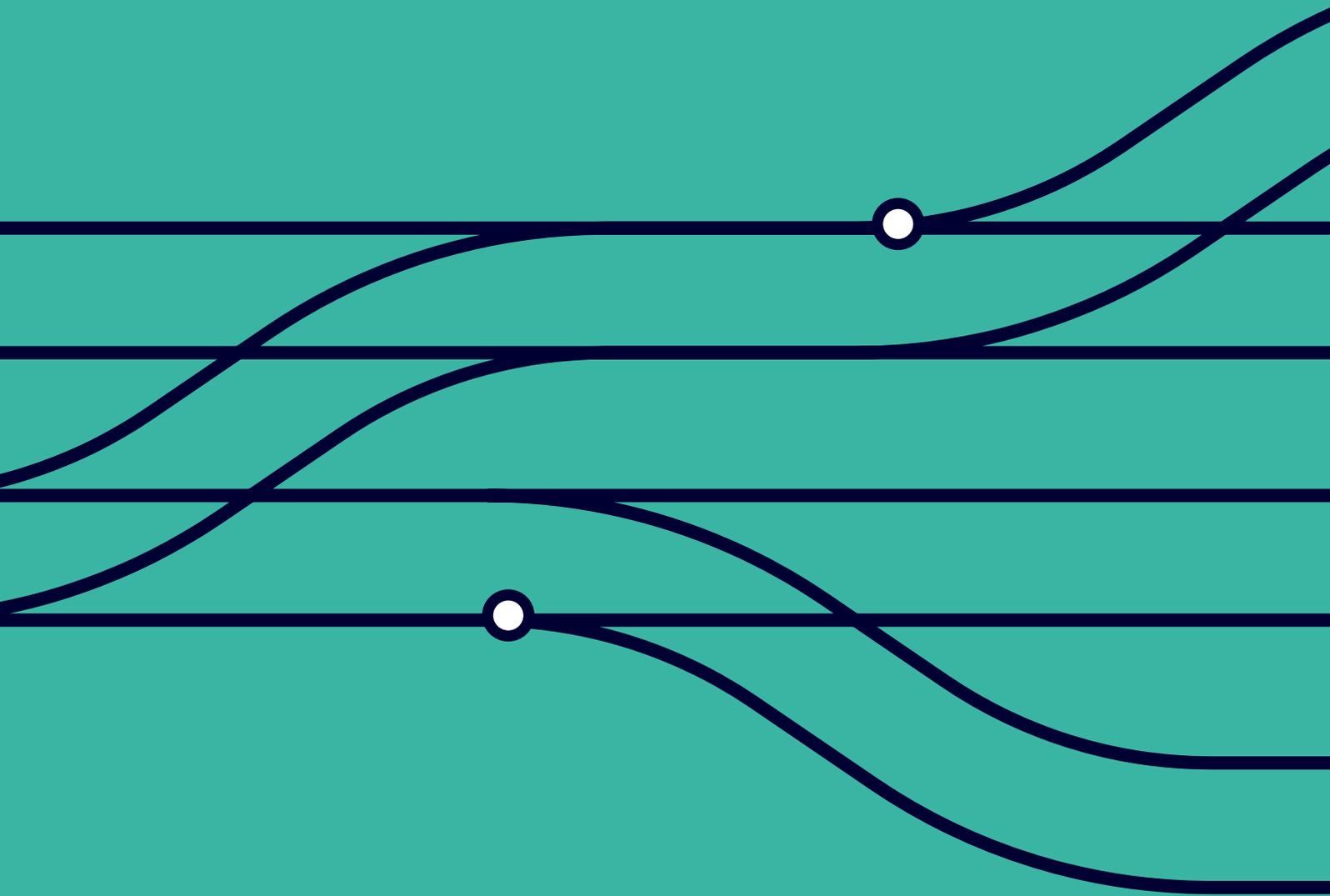


**copper**



# Attitudes to rail



April 2021

## Introduction

**The UK pioneered the development of railways, and the subsequent rail network helped to establish modern Britain. From enabling industries to flourish, to delivering goods and people to fast growing cities, and allowing working people to benefit from growing leisure time, we are a nation that has been inextricably linked to trains.**

The country's relationship with railways is changing, as new high speed rail reshapes the network and changes popular expectations of journey times and customer experiences. At the same time, Covid has had an enormous impact on daily lives, changing working patterns, family life and leisure pursuits in the short term, with lasting consequences. The drive towards net zero and aspirations to level-up the UK's economic prospects, will also influence travel patterns across the UK.

It may not be possible to fully appreciate the lasting implications of these changes for years to come. But, now is an important moment to consider what the public thinks about its railways, what their aspirations are for the future of the service in order to establish a network that reflects ongoing changes and will meet customer demand in future. As a result, Copper has focused its latest attitudes on rail infrastructure, public perceptions of its impacts and benefits, and what their expectations are as customers.

Copper has measured public attitudes to infrastructure for over five years to understand sentiment around key areas of our industry. The Attitudes to Rail report forms part of a suite of reports into public perceptions of the infrastructure that serves them, and includes reports into the transition to net zero and urban transport.

## Key findings



The UK's rail network remains an important part of the country's transport infrastructure



The UK populace has a broadly positive perspective of our rail system



Despite Covid, more people may choose to use the network more regularly than before the pandemic. However, the proportion of daily commuters remains a small part of society



There is strong support for investment in the rail industry and infrastructure



However, this may not be to improve local access or economic prospects, rather reducing road congestion is the primary objective



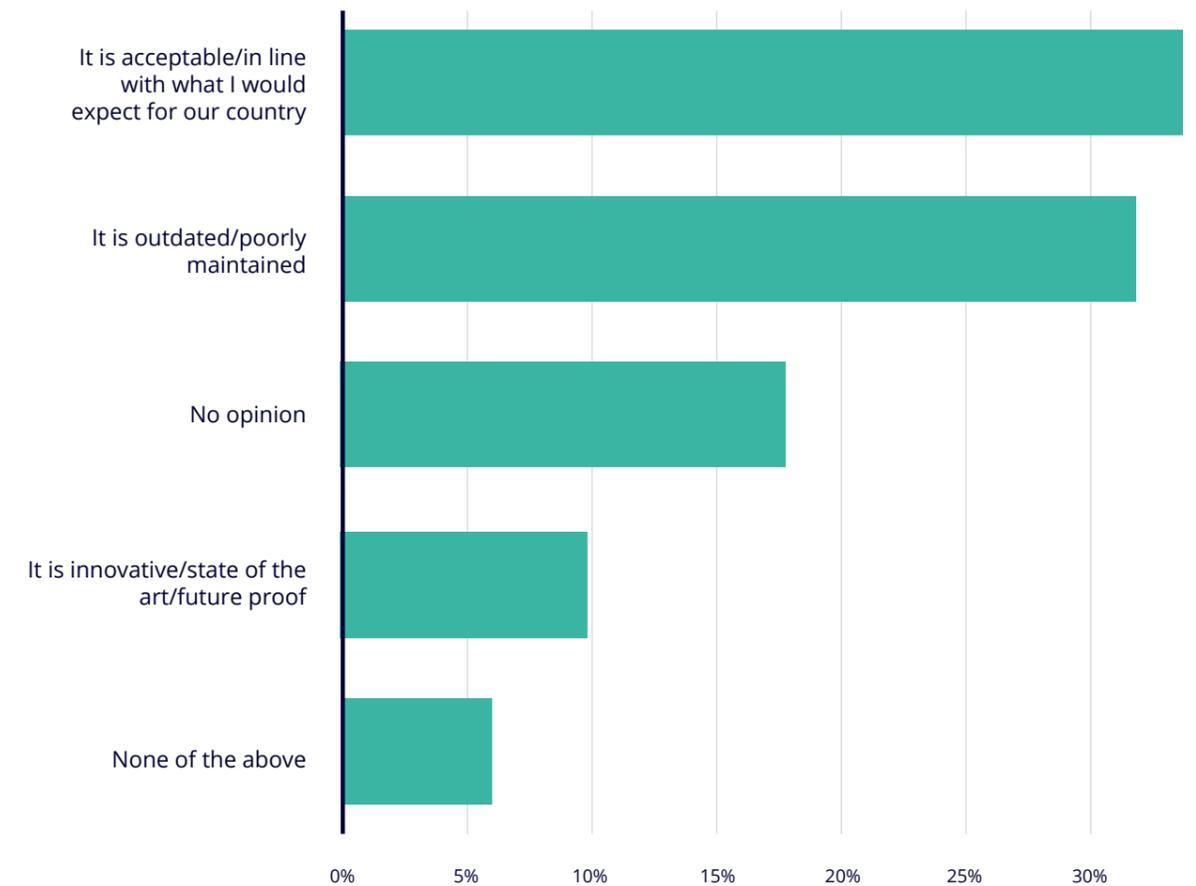
Travel by rail is considered to be sustainable, indicating that years of promotion of public transport has impacted public perceptions

## Public attitudes to rail

## The state of the nation's rail network

The long standing view of the UK's rail network as being under-invested and requiring significant modernisation may have been addressed in recent decades, as only 32% of people feel that it is outdated or poorly maintained. However, a significant amount still needs to be done if the UK is to develop a rail network which is to be considered innovative, state of the art or future proof.

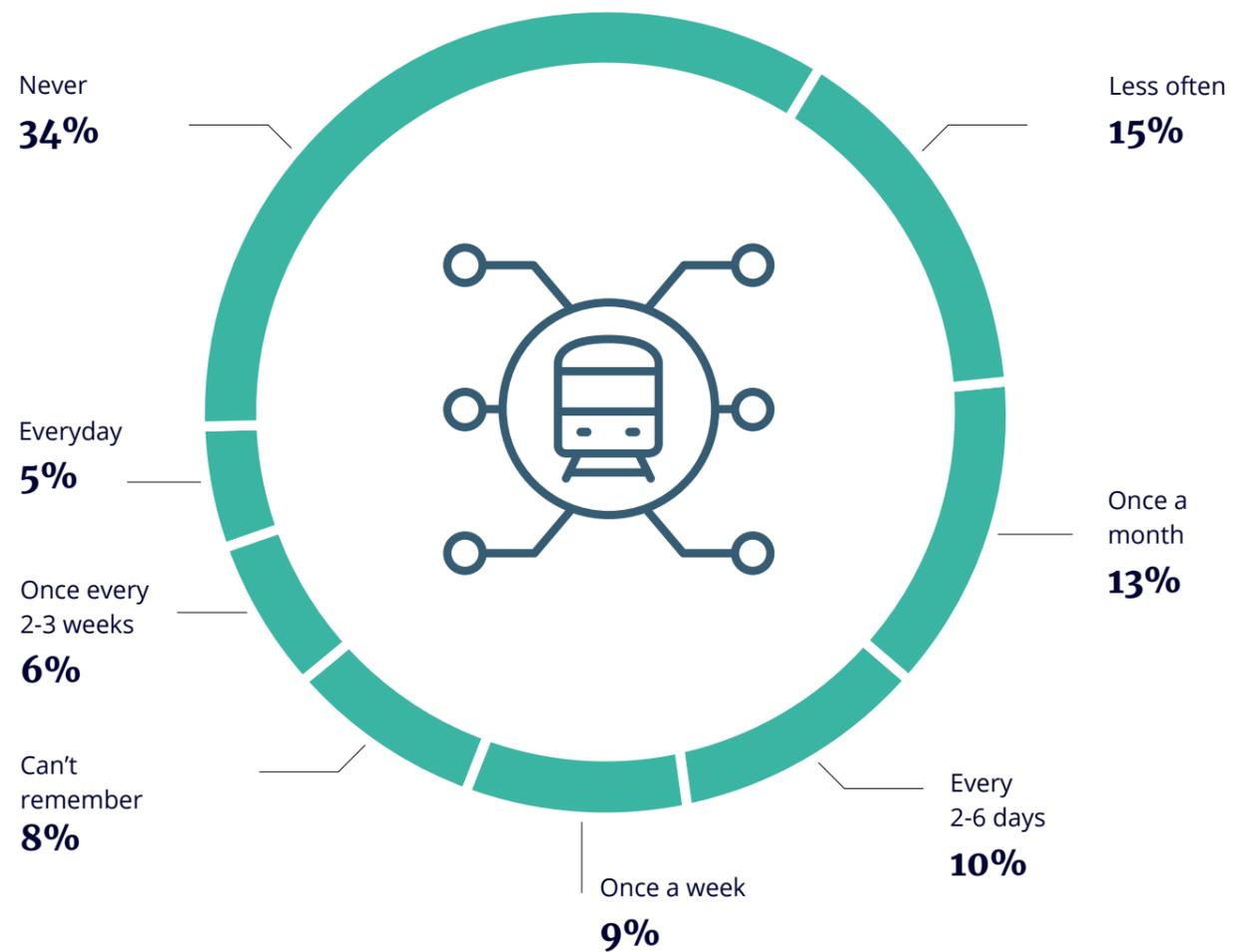
Which, if any, of the below statements best describes what you think of the UK's rail network?



## Rail remains critical despite Covid

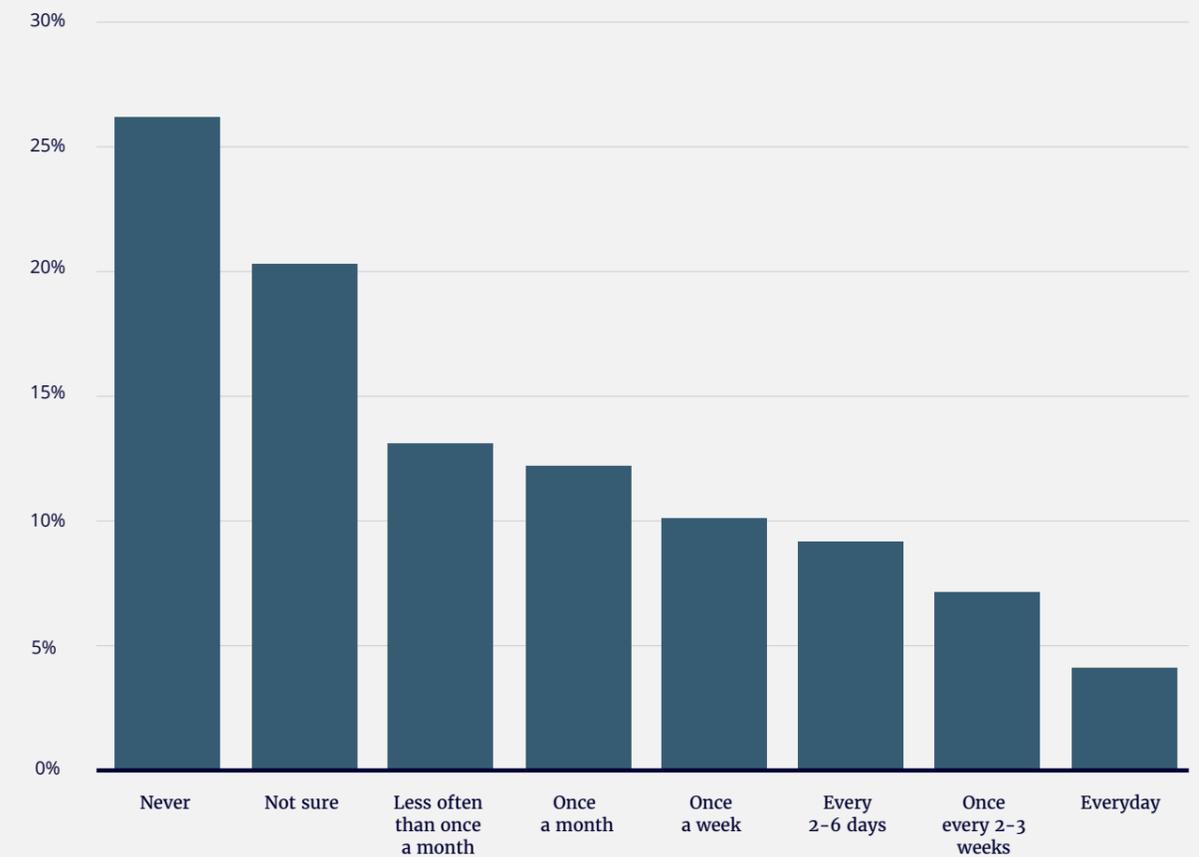
The UK rail network was a critical element of the nation's transport infrastructure leading up to the Covid pandemic. Only 34% of people never travelled by train, and 42% of people travelled by train at least once a month.

### How often, if at all, did you use the UK rail network pre-Covid?



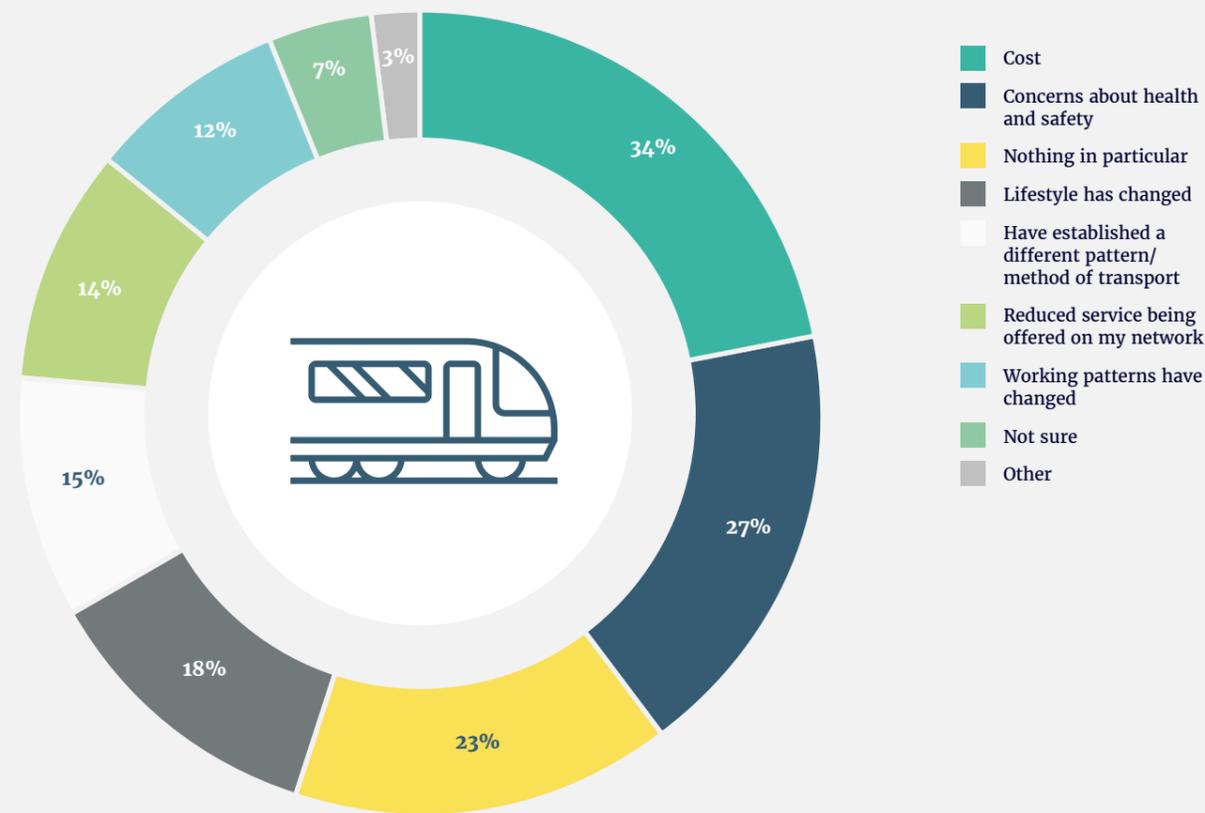
The impact of Covid upon the rail system may not be as dramatic as has been predicted in some quarters. The number of people who say they expect to never use the train after Covid has dropped to 26%, a fall of 8%. However, usage patterns may also change, with only 4% of people expecting to use the train everyday compared to 5% before Covid, and the numbers of people expecting to use the train at least once a week falling from 24% to 22%.

### How often, if at all, will you use the UK rail network when it is deemed safe to travel again/after Covid?



More flexible working patterns may contribute to that anticipated change in usage of the rail network, with 12% of people suggesting this would limit the amount they travel by train. However, the perceived cost of the train is a far more significant factor, as sighted by 34% of people, followed by concerns about health and safety sighted by 27%.

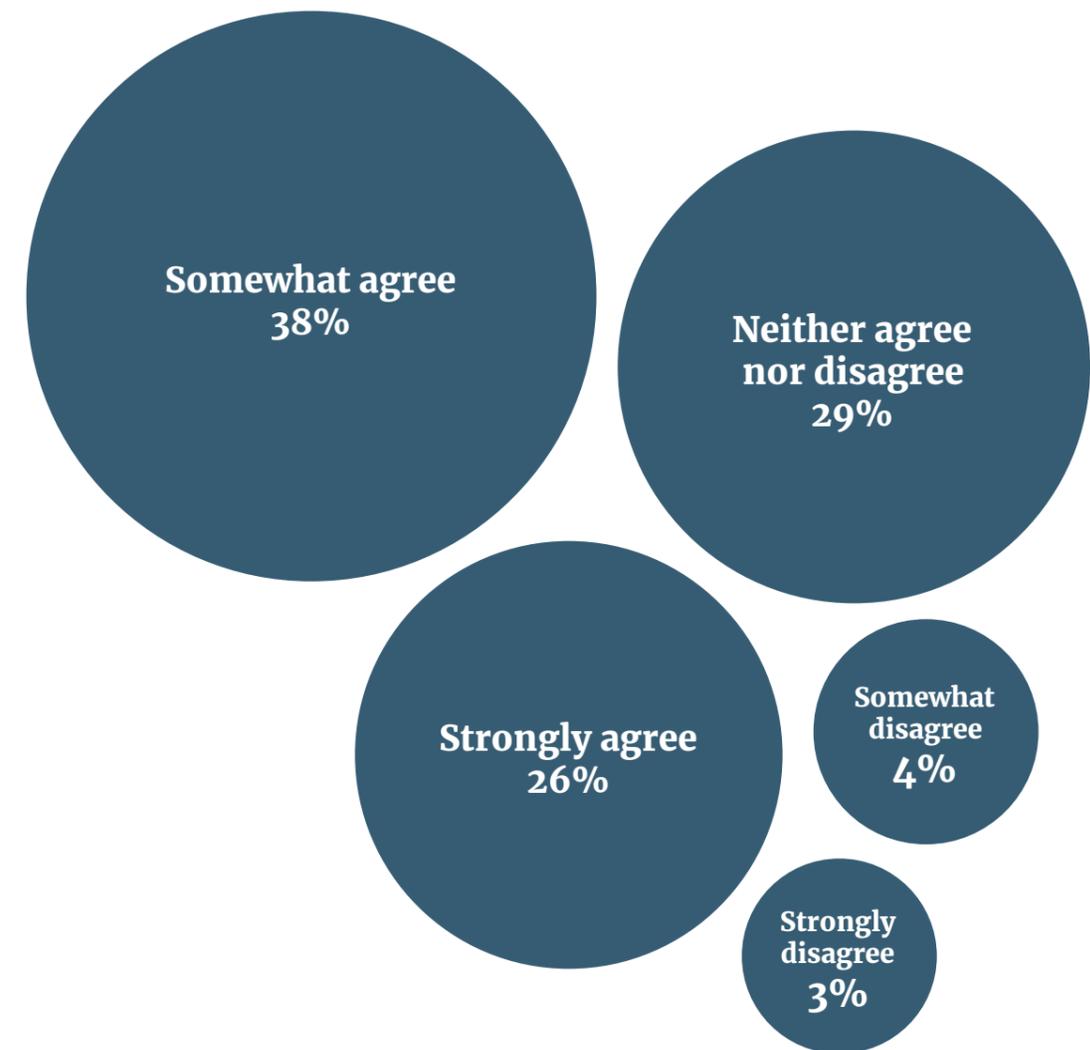
**What, if any, factors would be most likely to limit your use of the rail network in future?**



## Underlying support for investment

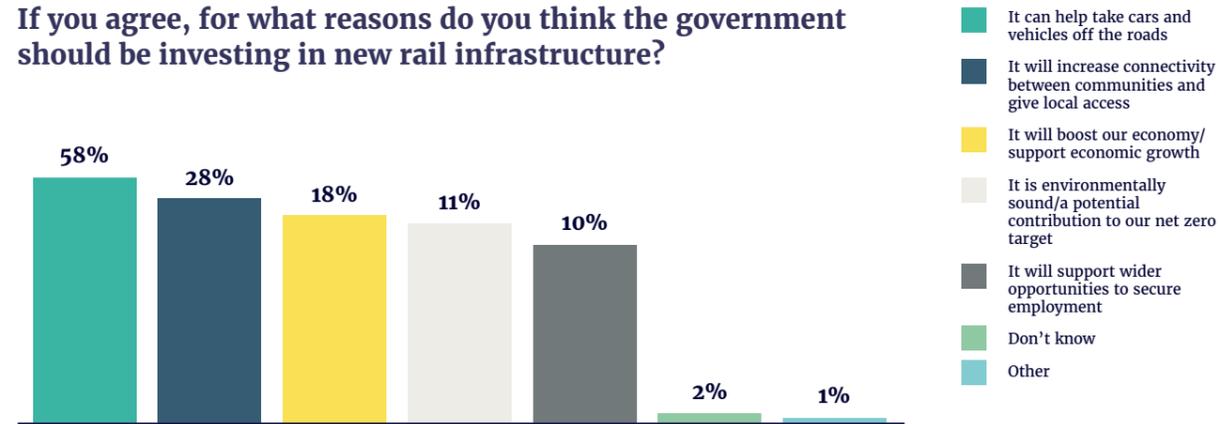
There are significant levels of support for future investment in the rail network, with 64% of people either agreeing or strongly agreeing that the government should invest in the development of the rail system. This is compared to only 7% of people who disagree with the principal.

**To what extent do you agree or disagree with the following statement: The government should be investing in new rail infrastructure, such as developing new train stations or rail lines.**



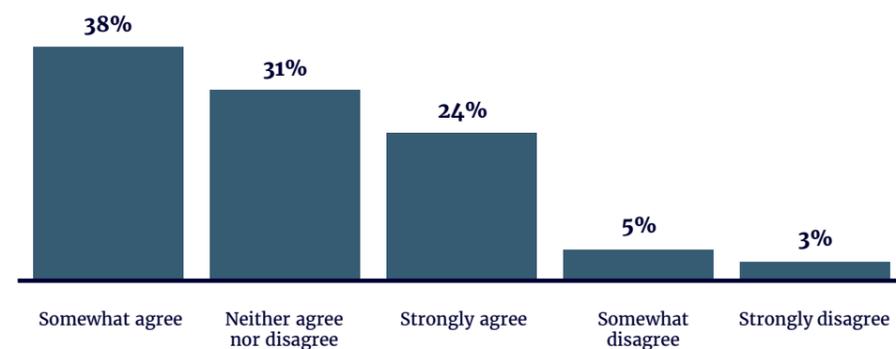
The support for that investment relates to economic or social factors, with contributions towards net zero only being the fourth most significant option for people. Reducing congestion is an outcome that people are clearly looking for as a result of investment in rail. This may result from concerns regarding air quality, along with an aspiration to reduce journey times for motorists.

**If you agree, for what reasons do you think the government should be investing in new rail infrastructure?**



Possibly as a result of the same concerns, the majority of people also want to see more HGV freight taken from road onto rail to increase road capacity.

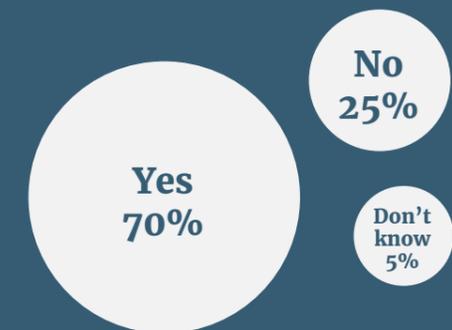
**To what extent do you agree or disagree with the following statement: Road freight/HGV deliveries should be put on trains to increase road capacity.**



## Access to the rail network

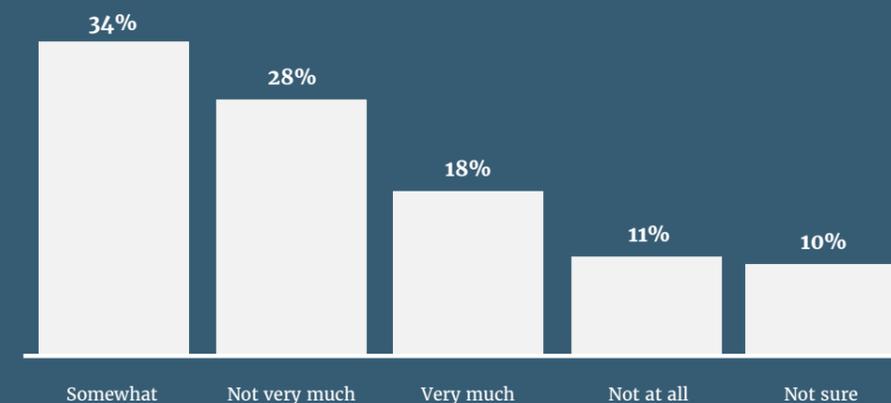
The majority of respondents identified that they already have access to a rail station which could be used as part of regular travel. While accessibility may remain a factor which limits rail travel in some communities, notably in Northern Ireland and the North East, cost and other issues are likely to limit sustainable travel choices for much of the country.

**Do you have an accessible local train station/a station near you that you could use as part of your regular travel options?**



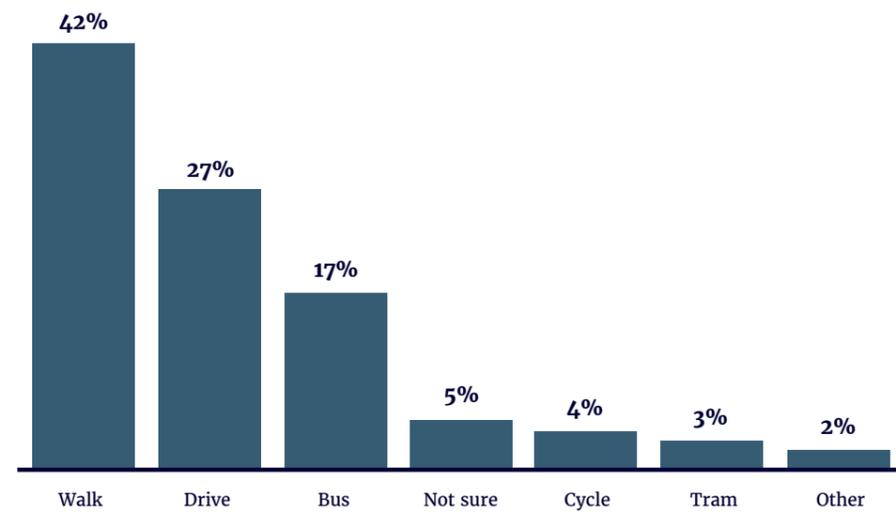
The fact that accessibility is not the primary limiting factor on rail travel is indicated by the fact that only 50% of respondents said they or their family would benefit from better access to a rail station.

**How much, if at all, would you, your family, friends and neighbours benefit from better access to a local station?**

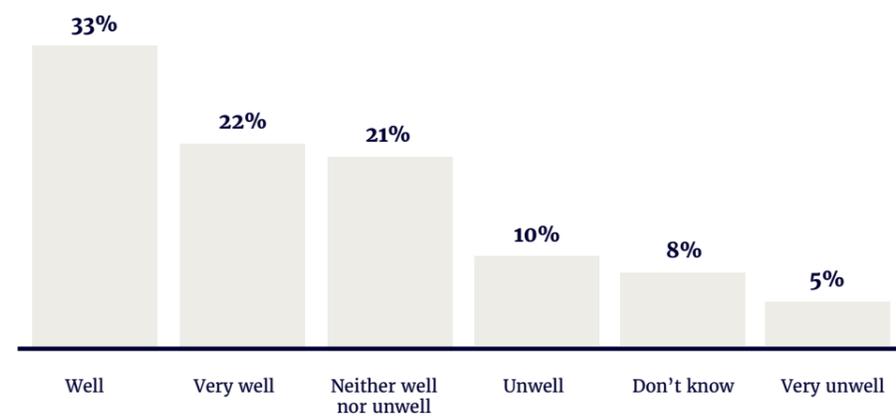


The sustainable transport connections to and from train stations are also encouraging, with the majority of people feeling that their local station is either well or very well connected to public transport.

**How would you most conveniently travel to your local train station?**

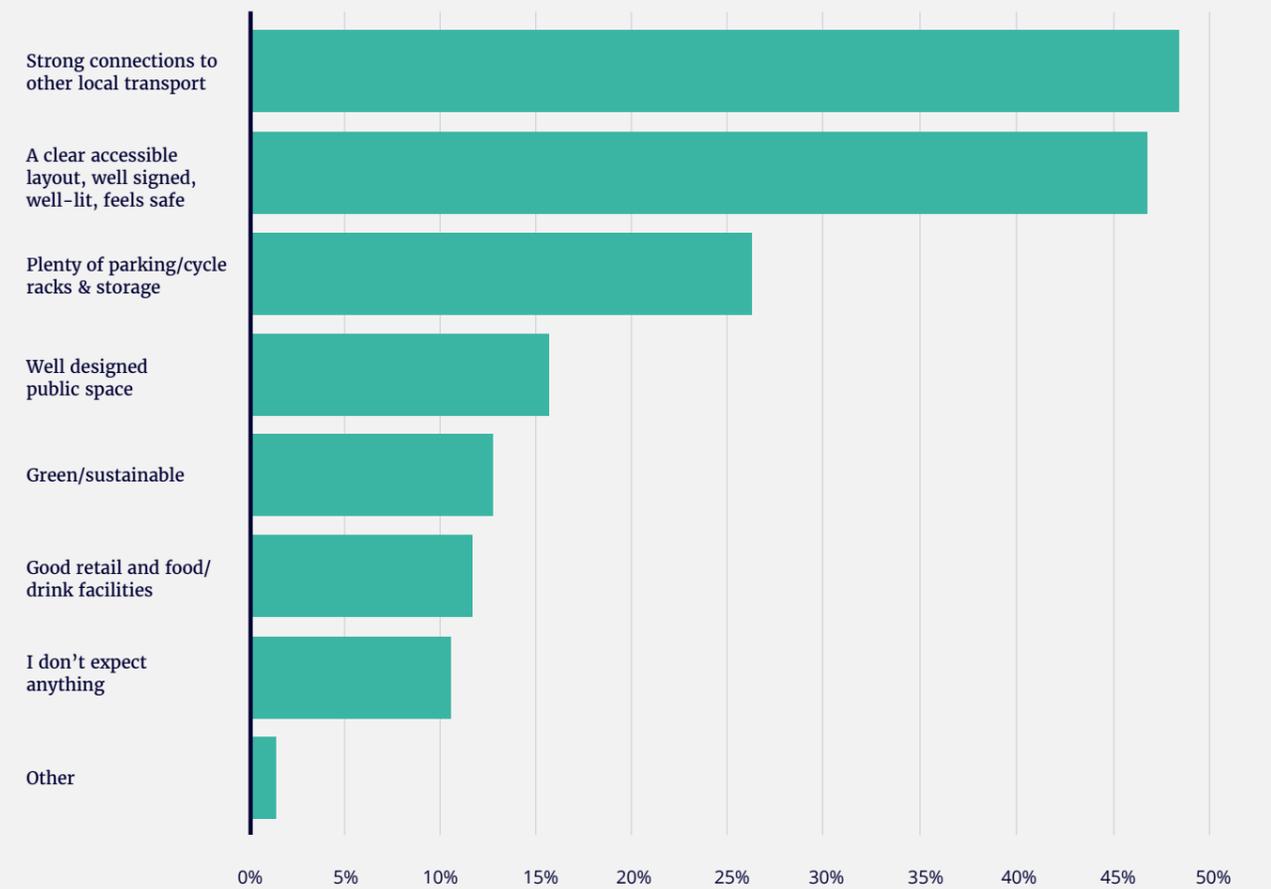


**How well or unwell is your local train station connected to the local public transport network, such as buses, trams etc.?**



The role of a train station as a transport hub is important, as people are looking for strong connections, along with accessible and safe design.

**What, if anything, do you do you mainly expect from a train station?**



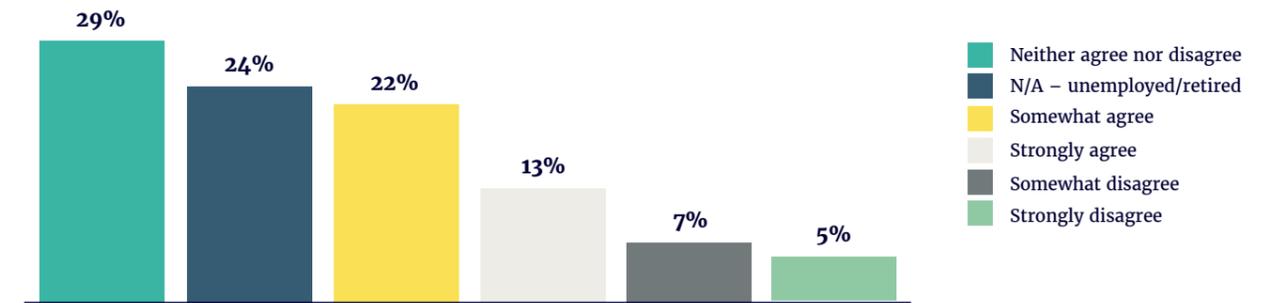
# The benefits of rail

## Rail as a catalyst for economic growth

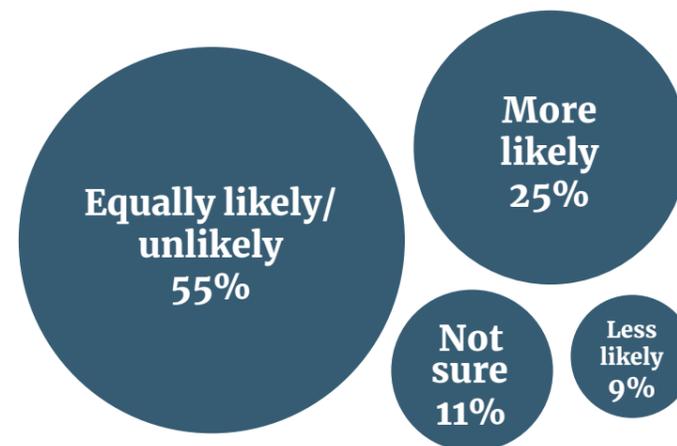
The role that an accessible rail station plays in improving job prospects is not clearly understood. As a result, local and regional authorities face an ongoing challenge to fully capitalise on the opportunity created by new rail infrastructure, particularly in attracting new employers who will

wish to access a more mobile workforce. The lack of a clear connection between rail and economic opportunity may also explain why proximity to a rail station is not seen as a significant advantage when looking for a new home.

**To what extent do you agree or disagree with the following statement: Better rail links near home would improve my job prospect/opportunities.**



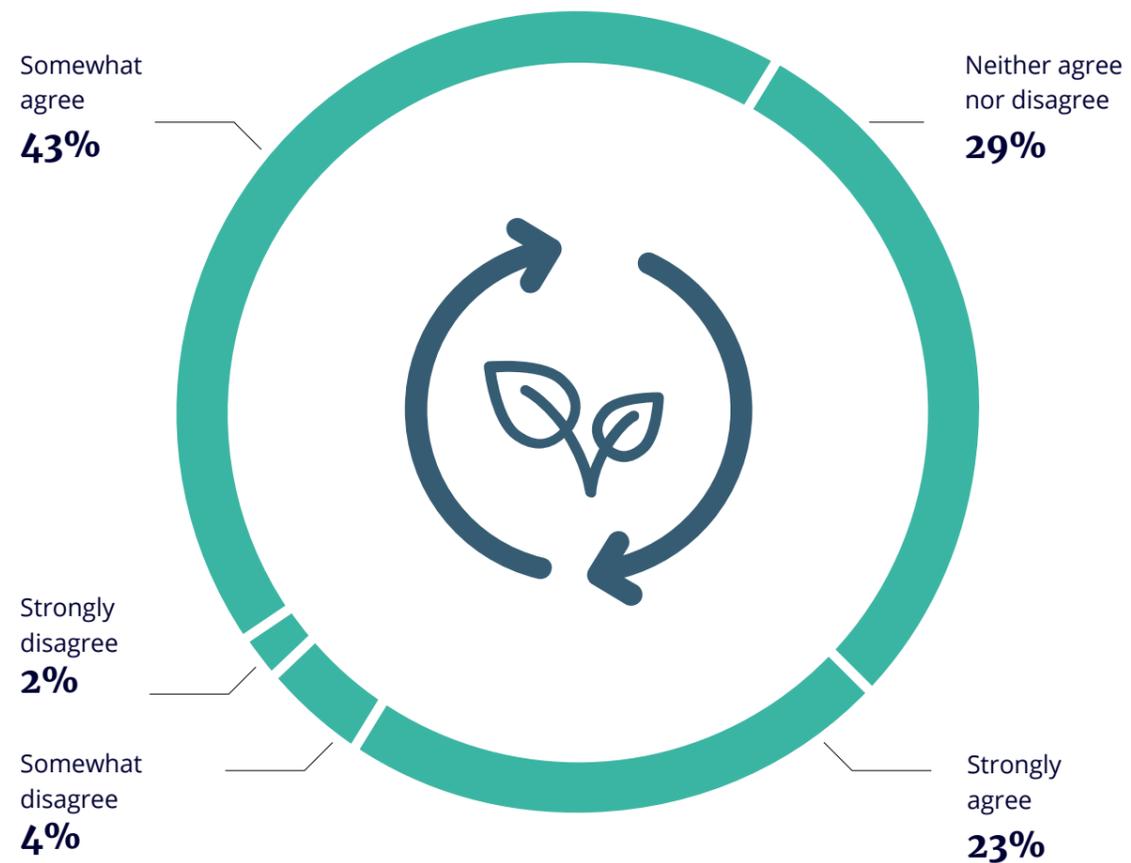
**When buying/if you were to buy a new home, would you be more or less likely to buy a particular property if it had access to a local rail line?**



## Rail as a sustainable choice

The role that rail can play as a contribution to sustainable transport is well understood. A clear theme has emerged throughout the research that rail is seen as a more sustainable alternative to journeys in private cars and that offsetting trips may be seen as the most significant environmental benefit of enhanced rail networks.

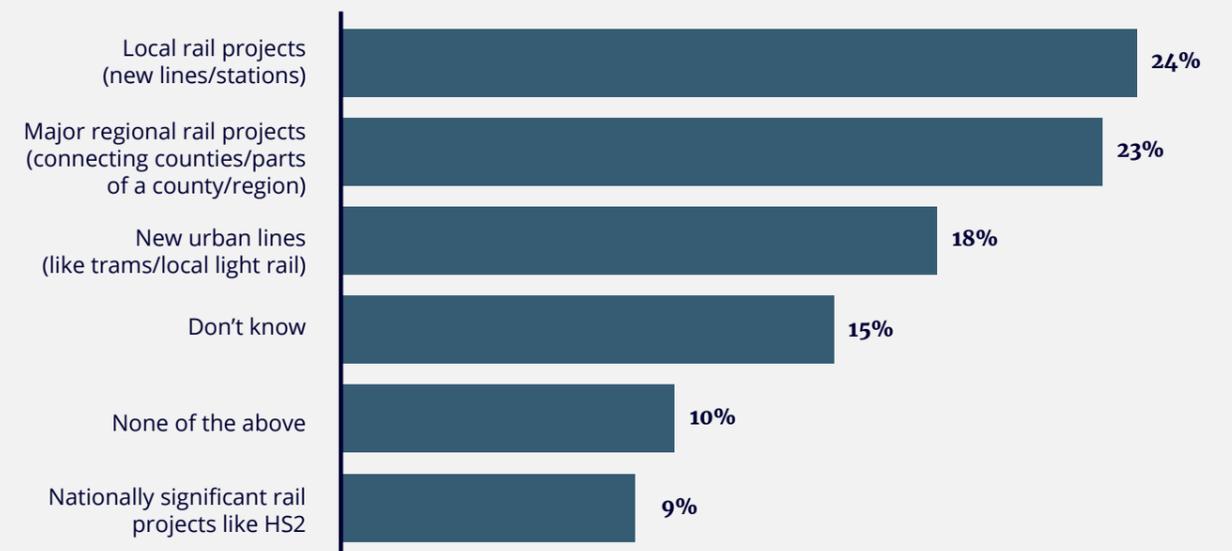
**To what extent do you agree or disagree with the following statement: Rail travel is a green form of transport, and developing new rail infrastructure would support the country's efforts to reduce carbon emission.**



## Local benefits outweigh national importance

In keeping with the findings of previous Attitudes reports, people across the UK strongly favour projects that will have a tangible impact on their local community. As a result, the majority of people suggest that investment should focus upon regional, local or urban rail improvements. This highlights the need for the largest scale, most nationally significant projects, to communicate effectively with local communities and to explain the benefits of projects in local rather than just national terms.

**Which, if any, of the below is most important to you, for the country to invest in?**

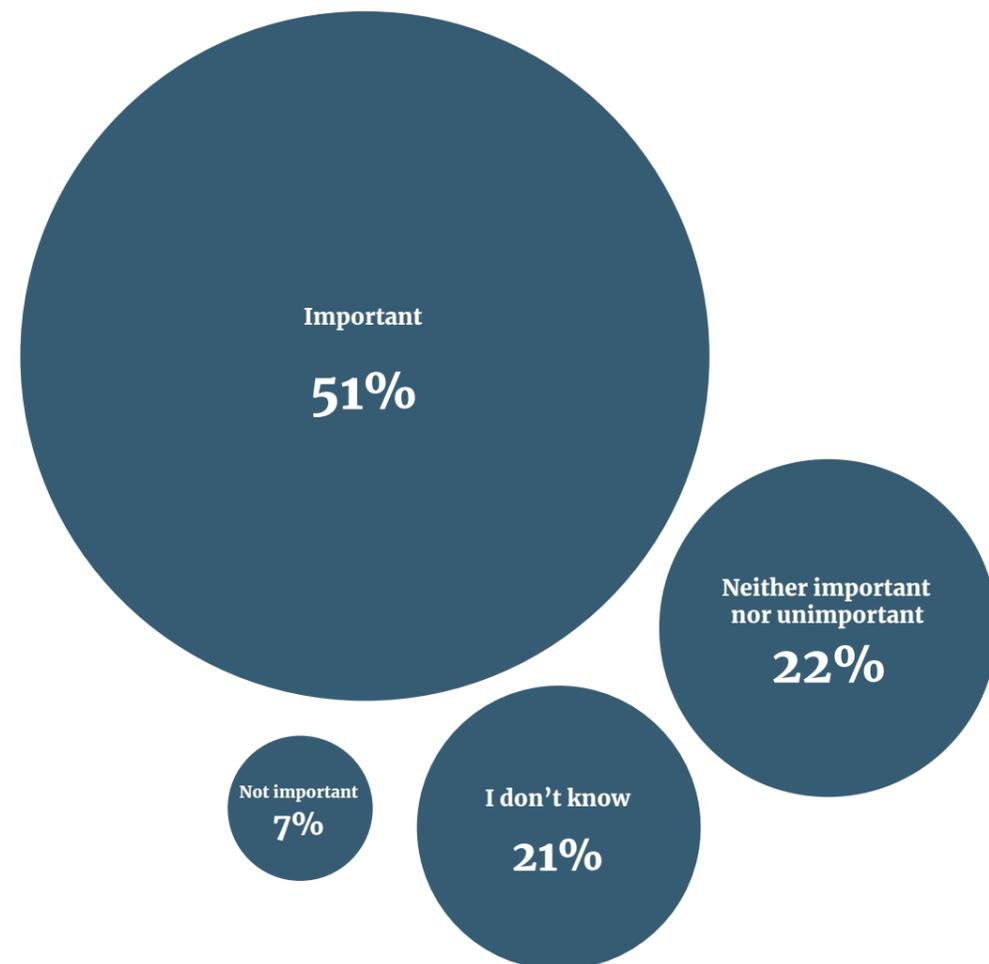


## The role of rail in Levelling-up

Improving transport links to level up the economy is widely supported, with fewer than 10% of people suggesting that improved transport links will not have an important role to play. People in

the East Midlands, North East and North West believe that enhanced transport links will have the greatest role to play.

**The Government has a policy objective to Level-up communities and regions, by spreading opportunity, investment and prosperity more evenly around the UK. To what extent to you think improved transport links will play a part in that process?**



## Conclusions



The findings of this research into public attitudes to rail infrastructure are in many ways encouraging. The long standing perception that the UK rail network has been under-invested, and lags behind customer expectations, appears to have been addressed to an extent. This may contribute to the fact that a slightly higher proportion of people are planning to travel by rail after the Covid pandemic than before.



That support for investment is predicated on a number of factors, including that rail travel is able to transfer journeys off the road network and reduce congestion. There is also the highest level of support for local or regional investment projects, which are perceived as having the greatest tangible impact for communities.



There is also widespread support for investment into the UK's rail system, with the vast majority of people backing intervention, especially where rail is able to offer a sustainable alternative to private cars. Accessibility of the rail network to local communities is considered important, but the majority of people, in most regions of the UK are able to access a station for regular use.



There is an opportunity to capitalise on the level of support for the rail system, as a sustainable element of the transport system. However, it will be important to demonstrate tangible, local benefits for communities, which are social and economic as well as environmental.



Cost is however the most significant limiting factor to use of the rail system, outweighing current issues regarding health and safety, or changes to lifestyle or working arrangements. Overcoming the perception that train travel is expensive may be a more significant issue to solve than accessibility of the network.



There is widespread appreciation that enhanced transport links can have an important role to play in levelling up and this provides an opportunity to engage communities about the benefits that can be brought to their regions through ongoing investment in rail.

## Join the debate and have your say

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