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FROM LOVE TO LOYALTY

A Growth Opportunity in UK Rail

Introduction

The UK is falling back in love with rail.

61% of people say they love travelling by train – a four-year high – and 44% switched at least one car or plane journey to train this year.

But love hasn't become habit. When people default to a mode purely out of convenience, they're more likely to choose the car. The car isn't winning because it's always better. It's often winning because it's familiar. Plus, as expectations for rail are higher, the everyday realities of train travel mean satisfaction is falling.

Closing the gap means fixing what erodes trust for everyone and building the habit early among the one group not yet locked into car use: the under-30s.

This report sets out four practical, industry-wide tactics to turn love for the idea of the train into real habitual travel behaviour.



Rail is winning hearts

Love for rail is at a four-year high and more people are switching to rail over key competitors.

44%
switched to train
from car/air last year

31%
switched to car
from train/air last year

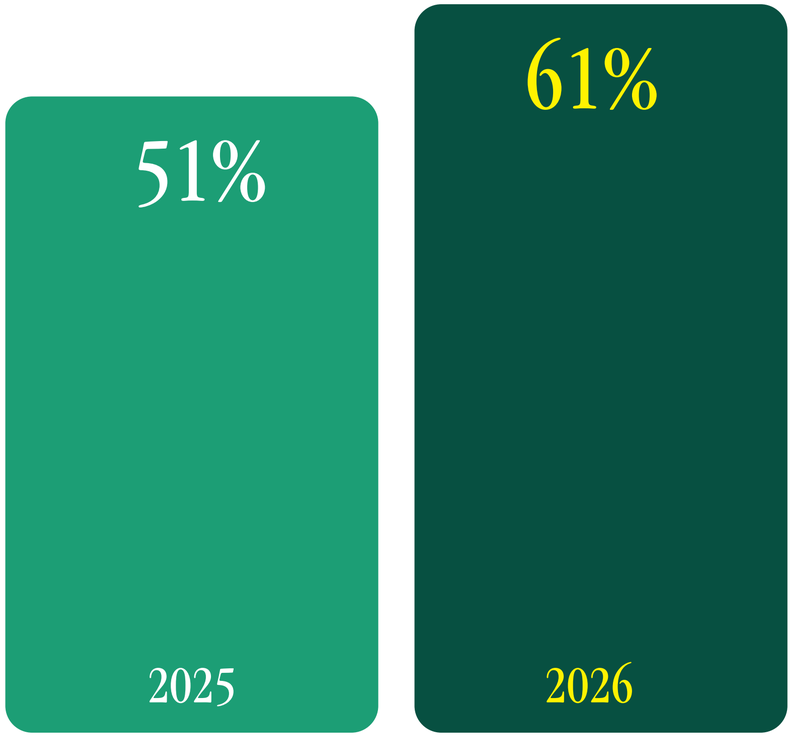
13%
switched to air from
train/car last year



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Rail is winning hearts

61% say they love travelling by train – the highest in four years of tracking. Rail is also gaining ground against car and plane, with positive net switching intentions, while pride in rail and ease of switching are both rising.



Love travelling by train

People expect to switch to train more in the next year

vs car: +20pt net shift to rail*



vs plane: +23pt net shift to rail



Take the train instead more
Travel in roughly the same way
Take the train instead less
Don't know

*28.8% - 8.4% = 20.4%, rounded down



Pride in travelling by train because it's environmentally friendly



Ease of switching to train

But love isn't habit...

Love doesn't automatically convert into a default behaviour. Most people stick with the car, often because it's the most immediate, familiar solution – meaning it's winning on habit.

Regularly* switch from train to car **37%**

Regularly switch from car to train **27%**

*more than 6 times a year



But love isn't habit...

"The car isn't winning because it seems better. It's often just the automatic choice. Rail's challenge is to become a no-brainer too."

55%

expect to travel roughly the same way when thinking about travel next year, no more/no less (see graph, page 5).



61%

of respondents say "the car feels easiest because I do it all the time"

THE OPPORTUNITIES:

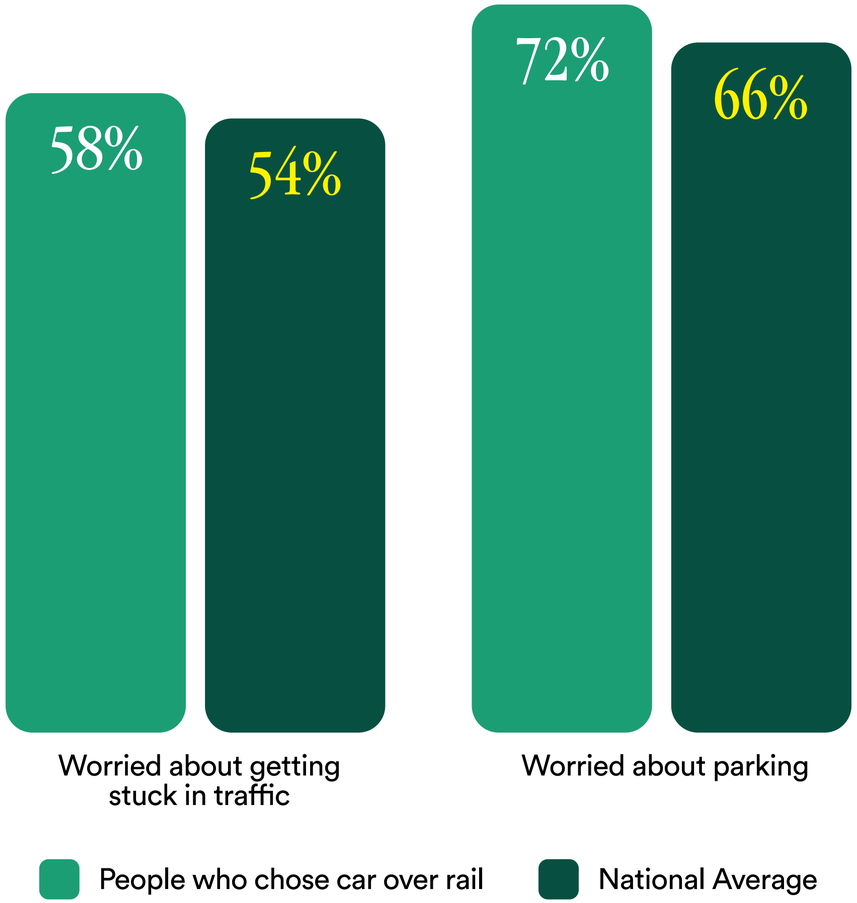
The unlocks against car

Rail hasn't yet matched the car's feeling of control, but it has an edge the car can't structurally offer. That advantage is emotional as well as rational.

Why people choose rail:

- Avoids having to drive — 56%
- Ability to relax — 53%
- No need to park — 48%

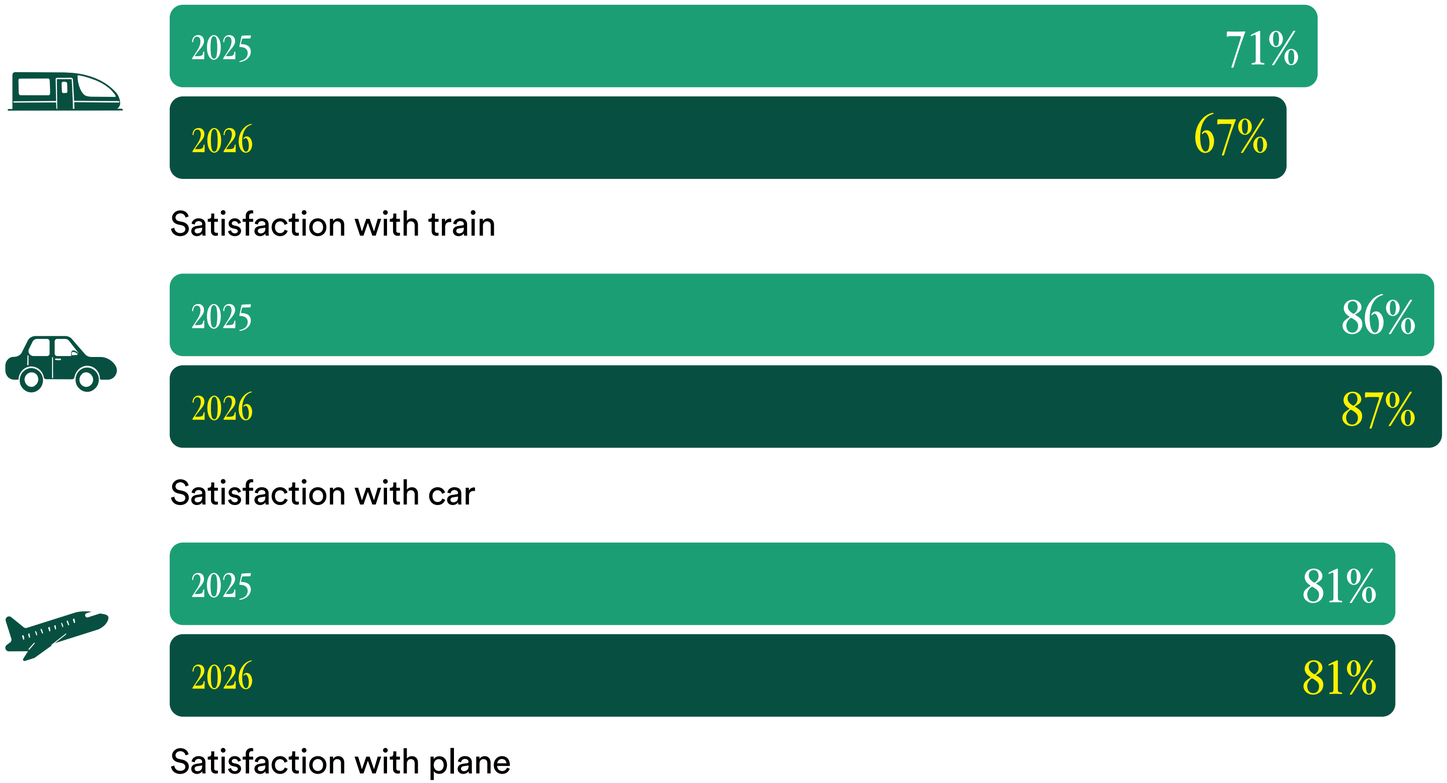
Those who choose car over rail get even more frustrated with key car failings than the average person: **58%** still worry about traffic; **72%** hate getting stuck with parking.



THE OPPORTUNITIES:

The unlocks against car

Yet, satisfaction with rail is in decline, with concerns around delays highlighting a clear opportunity to rebuild confidence.



And, 63% worry about delays when travelling by rail.

Our Opportunity

It's everyone working in rail's job to close the gap between the love for rail and the preference for rail

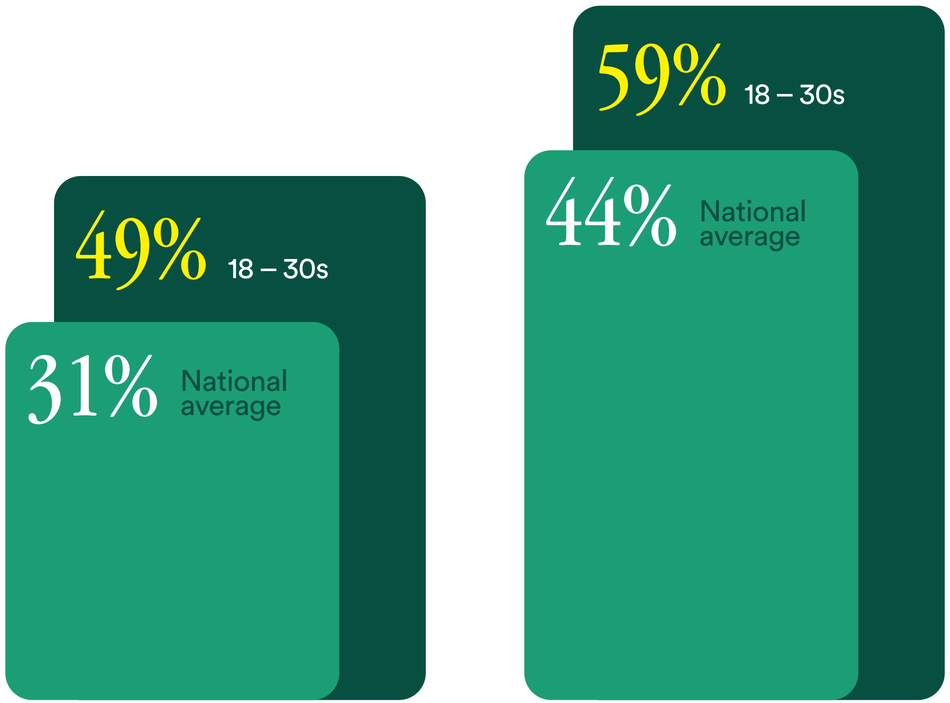
Top 2 interventions travellers said would make them choose rail:

1. Automatic compensation for delays or cancellations (reassurance when things go wrong)
2. Refunds on cancelled tickets (flexibility when plans change)

THE OPPORTUNITIES:

Young travellers

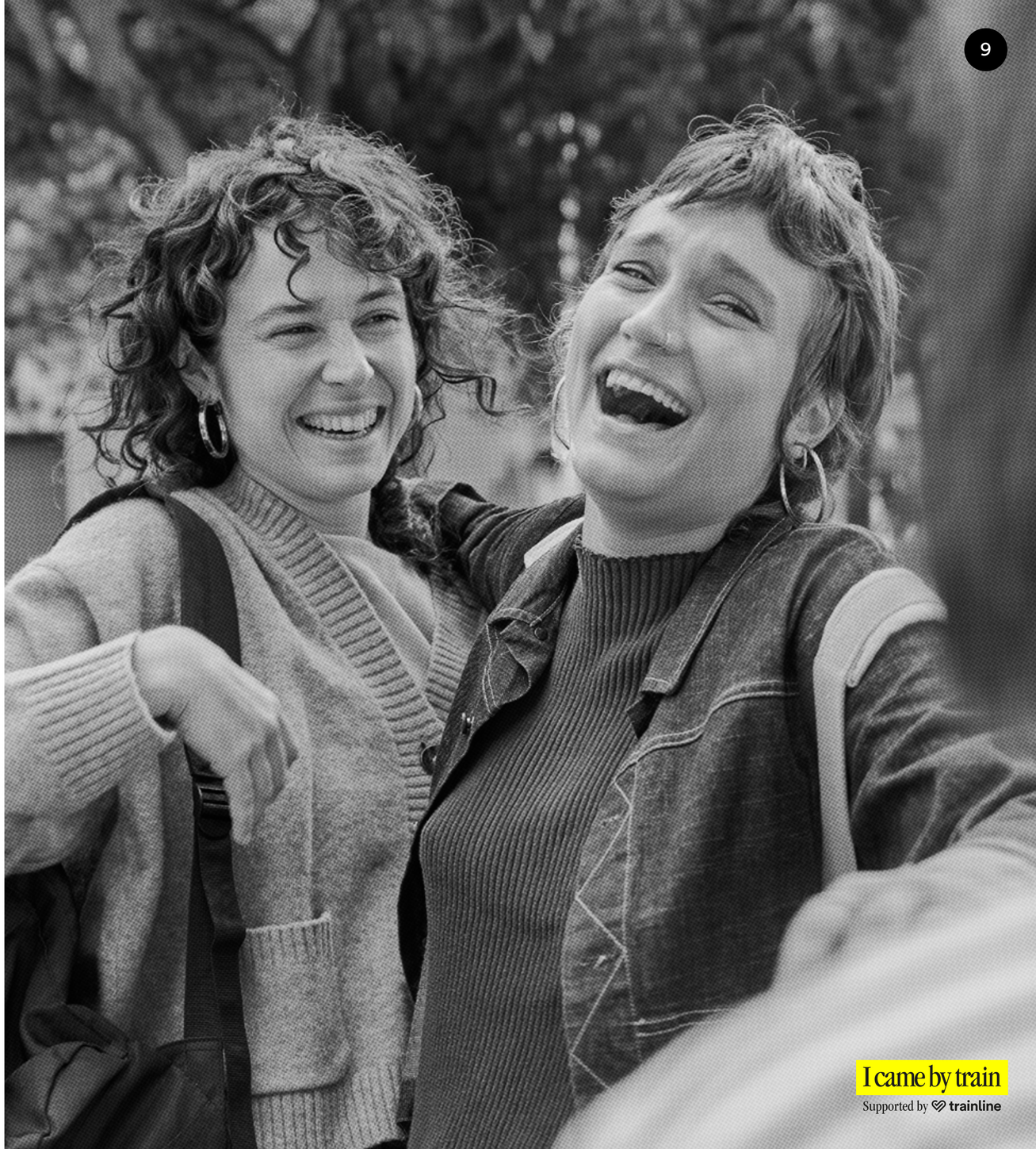
Younger travellers* switch to rail the most, but they also switch to car the most. They haven't settled into a fixed mode of transport, and the car habit hasn't yet locked in. This is our opportunity.



Switched to car from train/air

Switched to train from car/air

*For the purpose of this report, the definition of young travellers is '18-30 year olds'.



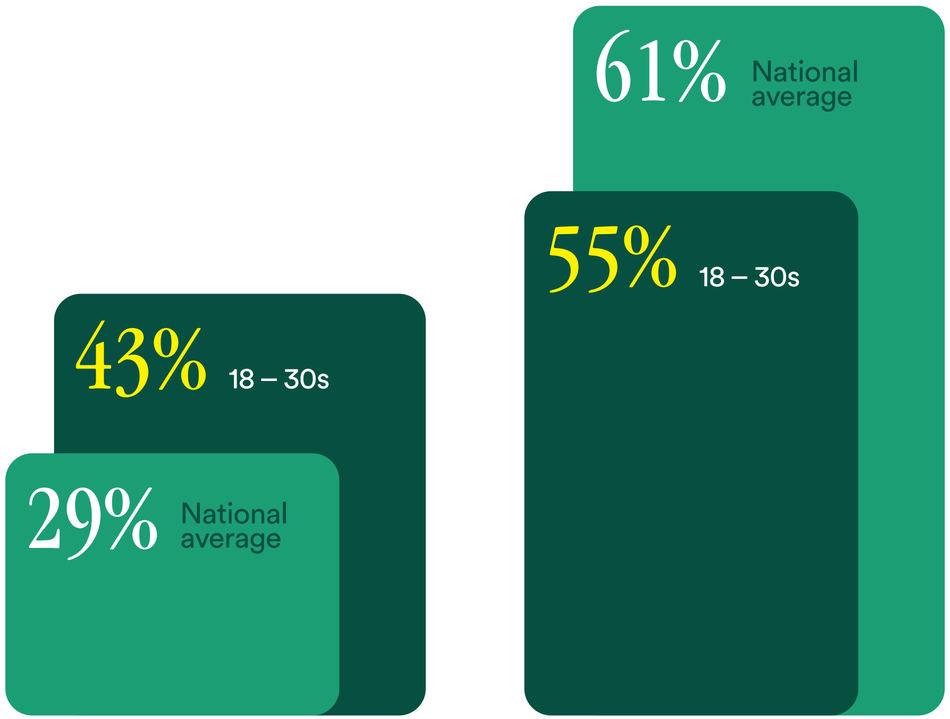
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THE OPPORTUNITIES:

Young travellers

Despite not being loyal to a mode of transport, there are signs indicating rail can earn their loyalty.



Expect to take the train instead of car more in the next year

Say the car feels easiest because they use it all the time



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Why this matters

1 For rail passengers

It's about closing the gap between how much people love rail and how well it meets their needs, making the train a better travel choice for them.

2 For the rail industry

Rail's future depends on winning habitual journeys now, before the next generation's travel patterns are set.

3 For our planet

Taking the train emits up to **70% less CO_2e** than driving and **85% less** than flying* – showing how small individual choices can add up to system-level change.

*Source: UK Government GHG Conversion Factors for Company Reporting 2026 (DESNZ/DEFRA). Figures are Well-to-Wheel (WTW), kgCO2e per passenger km. Rail: 0.03989. Average car: 0.13389 (based on average UK car occupancy of 1.55, National Travel Survey 2024). Domestic flight: 0.26278 (includes radiative forcing uplift). Rail saves 70% vs. car, 85% vs. domestic flight.

A shared job for us all:

To remove the friction and risk that stops switching to rail becoming the routine.

Here are four practical, consumer-facing tactics we can use today. These aren't our only options, but they are tools we can deploy without structural shift in cost or fare policy.

1 Reward repetition of switching

Recognise and reward switching with loyalty mechanics - points, streaks, status, rewards - available to every customer, wherever they book.

2 Make the train the obvious choice against car

Make rail feel easy, low-risk and less stressful than driving, with earlier nudges to train, real-time travel support and frictionless repeat journeys.

3 Make the unexpected feel manageable

Journeys don't always go to plan. Our job is to make the unexpected feel manageable, not stressful - through providing information and simple ways to adapt.

4 Build the habit young, on journeys that already exist

Attach the rail habit, to the high-frequency leisure, social and event travel that young people already do, before the car habit locks in.

“The UK is already switching to train. The shared task now is to turn one-offs into repeated behaviour.”

The opportunity is there for all of us to grasp: turning love for rail into a lasting habit. The tactics set out in this report offer a starting point. What comes next needs to be a shared endeavour – one we believe the industry can achieve by working together.

Notes on methodology:

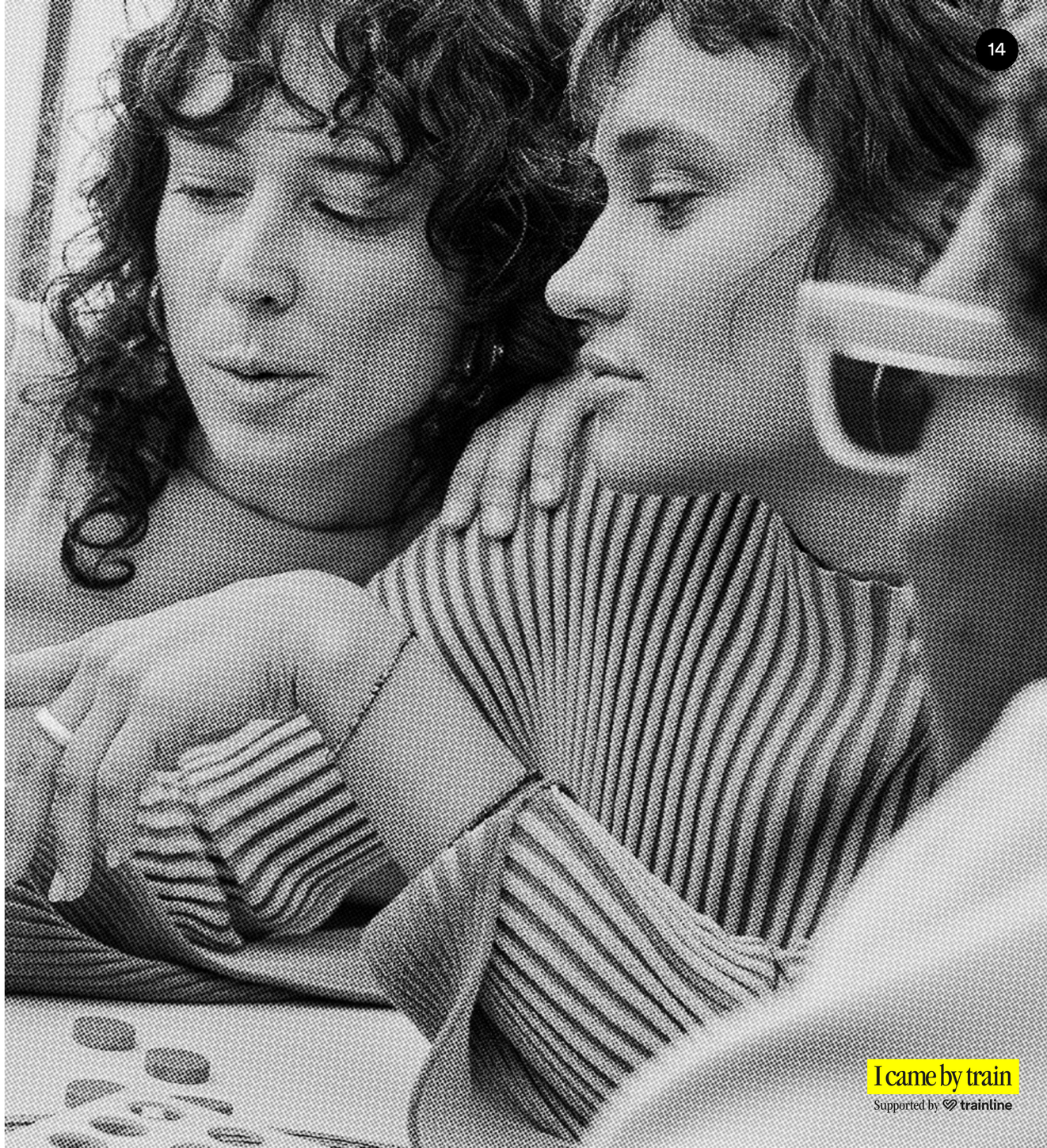
Trainline and GlobeScan conducted online surveys using reputable national consumer research panels to recruit respondents in the UK.

The total sample size in 2026 is n=2,039.

Fieldwork in 2026 ran from 27 May to 11 June.

The sample is nationally representative of the UK population as far as possible.

The findings build on previous studies conducted in April 2022, December 2022, July 2023, June 2024 and May 2025.





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Get in touch

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