



Williams Rail Review

Improving Passenger Trust in the Rail Sector

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britainthinks.com

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01 Key findings

Key findings

1

Passengers have significant concerns about rail in the UK.

- Delays, cancellations, high cost of rail and crowding are common complaints, with passengers sometimes feeling that there are no signs of improvement.
- While these are not necessarily common experiences for all passengers, the large negative impact that these experiences can have on passengers' days/lives mean that they overshadow positive associations with rail.
- Ultimately, passengers conclude that they are not at the heart of decision making in regard to rail in the UK.

2

While passengers do not feel that they fully understand the structure of the current rail system, they do feel that it is not working for them.

- There is a widespread sense that the current system is fragmented, meaning that there is little consistency across the rail system, and low accountability when things go wrong.

3

Overall, participants are very positive towards the idea of a new proposed national agency taking responsibility for the railway.

- This is largely driven by a perception that this new national agency could reduce fragmentation, increase consistency and accountability and make fares and ticketing simpler.
- There is also widespread support for the idea of a national agency setting strict standards for Train Operating Companies (TOCs), with associated penalties for not delivering on these targets.

Key findings

4

Participants want the new national agency to convey a sense of authority.

- Participants feel that having a prominent brand will increase awareness of the agency, give confidence to passengers that things are changing and provide reassurances about accountability.
- Participants think that the new agency should embody the following characteristics, and aim to demonstrate these in its brand: be firm and authoritative, put passengers first by being responsible and approachable, focus on improving the railway by being proactive and decisive, and display relevant expertise by being serious and knowledgeable.

5

While most feel that their interests should be at the heart of decision making for this new agency, they struggle to think of ways that their voice could be included in decision making.

- The idea of passengers' voices feeding into decision making feels remote, with few having experience of this in other areas of life.
- Passengers describe barriers to engaging on an individual level – including being too busy to take part, or feeling that there is little chance their views will have an impact. They also want to know that their involvement will be worthwhile including how their views will impact decision making.
- As a result, participants recommend formal engagement methods (workshops, advertised consultations) as a way of involving passengers, that do not assume high levels of engagement or expect passengers to volunteer their time.

6

Current ticket retail options are seen as satisfactory – it is the perceived complexity of the current pricing system that is of greater concern.

- Introducing more information, new packages, or a loyalty scheme are seen as 'nice to have' rather than a priority for improving the railway.

02 Background and methodology

Background and objectives

- The Williams Rail Review was established in September 2018 to review the whole rail industry and the way passenger rail services are delivered. It has the potential to lead to fundamental changes in the rail sector, with the aim to prioritise the interests of passengers and taxpayers.
- On behalf of the Williams Rail Review, the DfT commissioned BritainThinks to explore trust in rail and to test the views of passengers and the general public a number of core components of rail services, including the commercial model of rail and its organisational structure. The objectives of this research were to:
 - *Explore public trust in the railway, identifying what factors build up or undermine trust.*
 - Understand how it compares with other forms of travel, and how trust is affected by usage of rail (whether frequent, infrequent or rare).
 - *Explore understanding of and attitudes towards current organisational structures.*
 - And the impact these have on trust.
 - *Test attitudes towards potential changes to organisational structures.*
 - And understand the extent to which, if at all, these address concerns.

Alongside wider evidence including research by Transport Focus and Which?, findings from this research informed decision making at key points throughout the review.

Project overview

- BritainThinks was commissioned to conduct research across two stages:

Stage 1

- Explored public trust in the railway, identified what factors build up or undermine trust.
- Explored understanding of and attitudes towards current organisational structures, and the impact these have on trust.

Stage 2

- Tested attitudes towards potential changes to organisational structures and understood the extent to which, if at all, these address concerns.
- Understood desired role of passenger voice under a new rail structure.

- Stage 2 builds on the work published by the Williams Rail Review in February 2019¹ which outlined findings from Stage 1 of the research. Stage 2 approached the work through a deliberative lens: a citizen's workshop. This gave an opportunity for extended, informed deliberation with the public about their relationship with rail, and how to win back trust in the railway.

¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/797926/trust-in-the-rail-sector.pdf

Overview of methodology

Stage 1: Focus groups

Locations: 5 locations

Date: January 2019

Description: 10 x focus groups in 5 locations with 6-8 participants in each



- Current levels of trust in the railway
- Factors that contribute and undermine trust
- Participants own ideas for how to build public trust in the railway

Stage 2a: Extended focus groups

Locations: 4 locations

Date: June 2019

Description: 4 x extended focus groups (2.5 hours) with 6-8 participants in each



- Explored responses and attitudes towards two potential models for the future structure of rail, including a national and regional model.
- Understood how each model performs compared to the current system and in relation to trust and simplicity of use.

Stage 2b: Citizens' workshop

Location: Birmingham

Date: July 2019

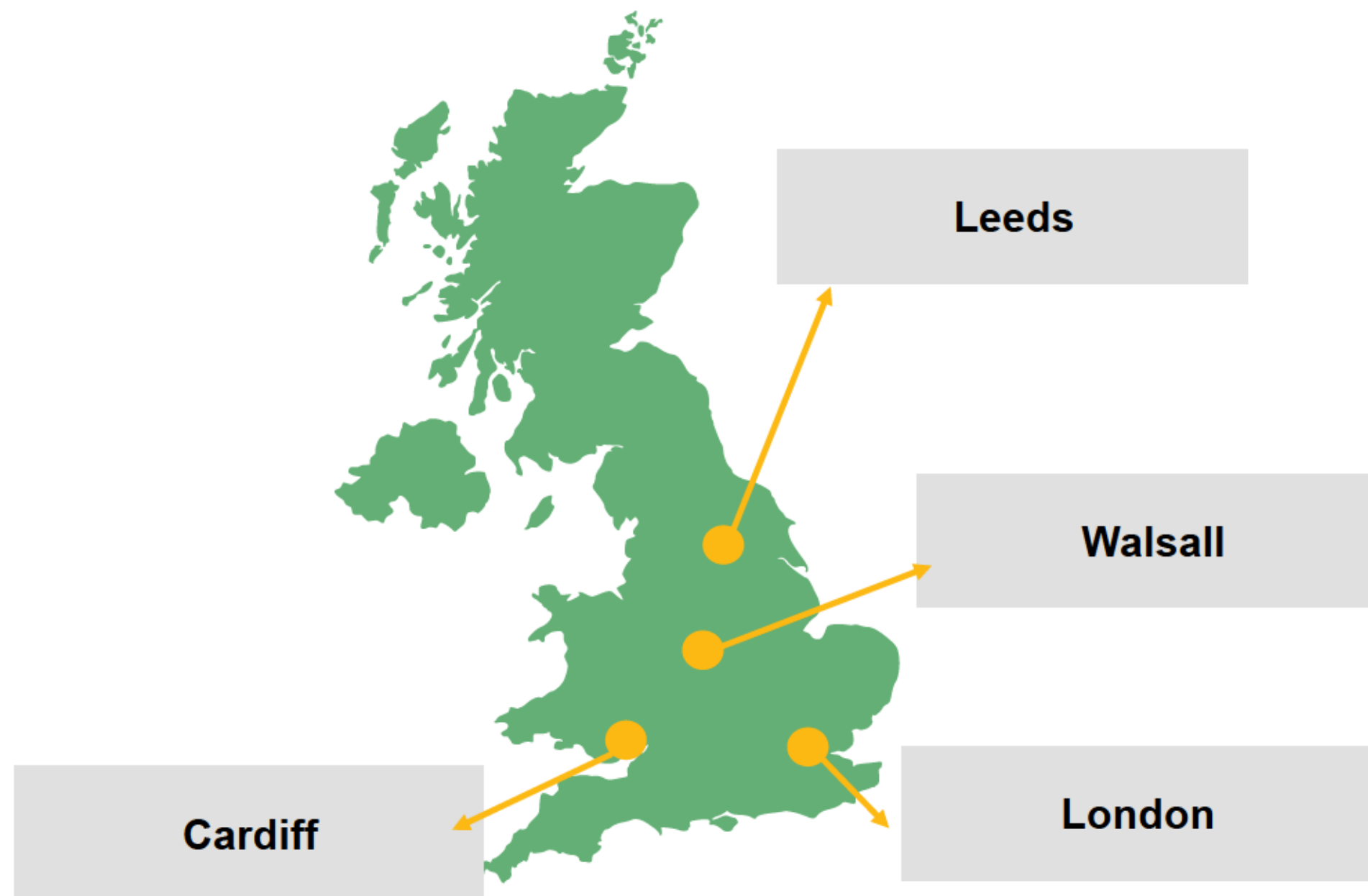
Description: 1 x 2-day workshop with 24 participants from England and Wales



- Views on rail in the UK and priorities for future service.
- Branding.
- Passenger voice.
- Ticket retailing.

Stage 2a: Methodology and sample

On 24th and 25th June 2019 we conducted 4 x extended focus groups (of 2.5 hours) with rail passengers, with 8 participants in each group (32 in total).

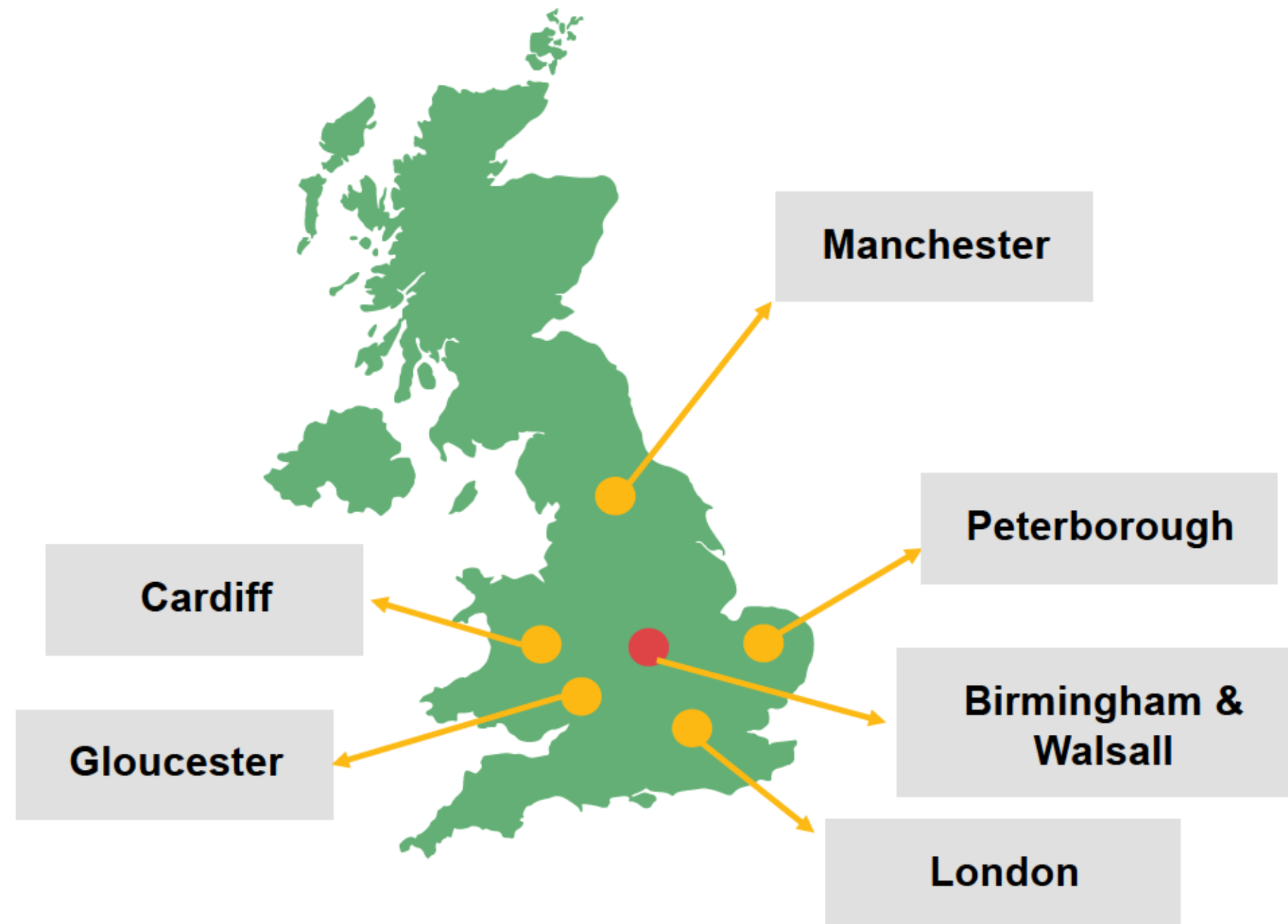


Sample overview

The sample included participants living in a range of suburban and rural areas, as well as a spread of ethnicity, age and socio-economic group, and a mix of rail-use type (commuter/discretionary travel).

Stage 2b: Methodology and sample

On the 16th and 17th July 2019 we conducted a 2 day workshop in **Birmingham** with 24 rail users from across England and Wales.



Relationship to rail

- **Mix of travel behaviours:**
 - 8 rail commuters
 - 14 non-commuter rail travellers
 - 2 non-rail travellers
- **Mix of attitudes to nationalisation:** majority with neutral/less strong views about nationalisation

The sample included participants living in a range of suburban and rural areas, as well as a spread of ethnicity, age and socio-economic group.

03 Understanding and experiences of the rail sector

3.1. Knowledge of the sector

3.2. Experience of rail & priorities for the future

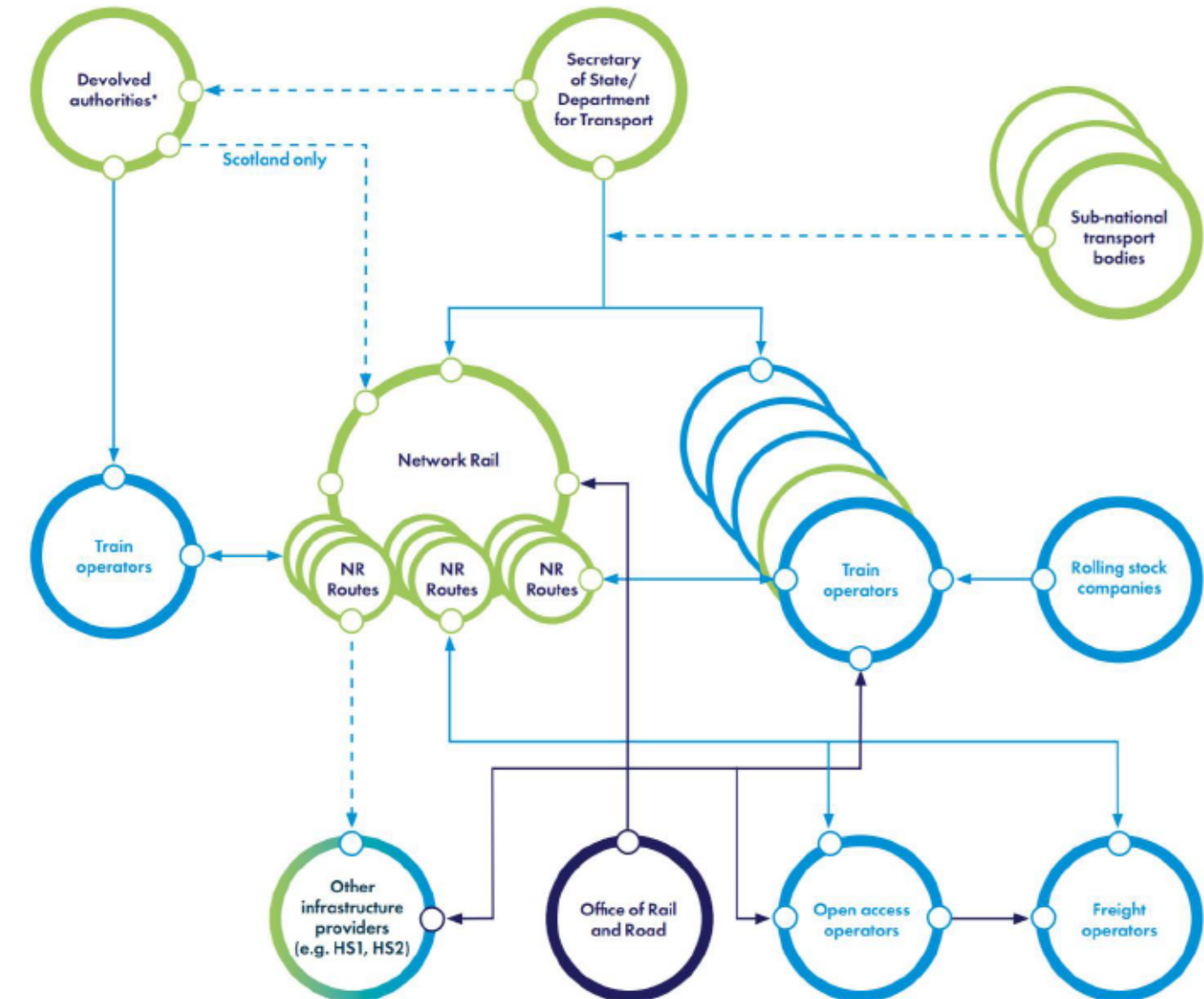
Overall there are low levels of understanding of the rail sector, its various bodies and how they work together

Perceptions of organisational structure*



*Responses to the activity "please draw a diagram of the UK railway industry"

Reality**



**Structure of the British Rail Industry (Williams Rail Review, the Rail Sector in numbers)

There is some awareness of both private and public sector involvement in rail, but few understand the specific role of each organisation



-
- While there is some name recognition of DfT and Network Rail, there is little understanding of what they do, how they relate to one another and who is ultimately accountable for problems in the rail sector.

-
- And there is little awareness of other bodies who are involved in rail.

Participants rarely understand the structure of the rail sector, yet there is a strong sense that the current system is a fragmented series of monopolies

This fragmentation is seen to make the system difficult to navigate for passengers and lead to a lack of accountability when things go wrong.

“The train companies are untouchable and the government aren't slightly involved.”
(Stage 1 focus group)

“They just blame each other all the time... I just stick to my car, thanks.”
(Stage 1 focus group)

“It's so fragmented, there are so many organisations....the tickets are so confusing...is profit the main ambition?”
(Citizens' workshop)

Ultimately, there is limited interest in the details of the organisational structure, only a desire for it to work.

“I don't think it's about who owns it, it's how it's run. The public aren't bothered who owns it, it's how it's run.”
(Stage 1 focus group)

“I think we only want transparency because it isn't working. If it was working, we wouldn't care less.”
(Stage 1 focus group)

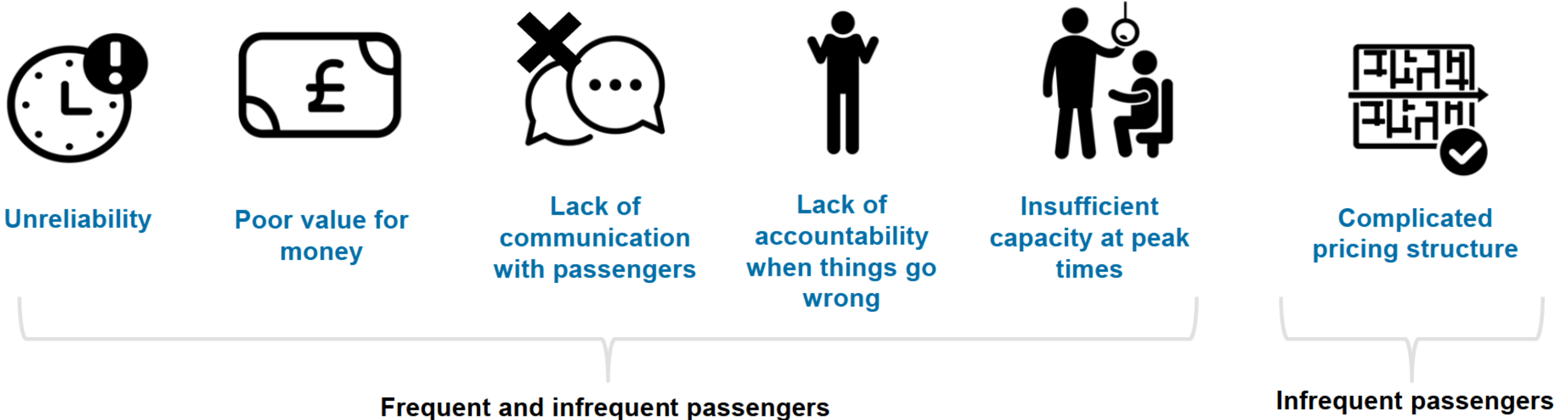
03 Understanding and experiences of the rail sector

3.1. Knowledge of the sector

3.2. Experience of rail & priorities for the future

Passengers report significant concerns about the railways

Rail passengers have common concerns about using the railway. These include:



Perceived unreliability of Britain's railway is a top concern for passengers

- Delays and cancellations to train journeys are felt to be a common occurrence, with the majority of passengers having experienced disruption to their journey.
- Issues with reliability are particularly top-of-mind for passengers:
 - This is a significant concern for commuters, who frequently inconvenience themselves (e.g. taking an earlier train) to minimise risks.
- Negative feelings around unreliability are heightened by the lack of clear communication and information around what has gone wrong, alternative travel arrangements, and compensation and/or refunds.

“Our system is so old and declined and the systems abroad are just miles better and we perceive our service for what it is, really poor.”

(Stage 1 focus group)

“I don't take the train if I'm going to the airport or going on holiday as I don't know if I'll get there in time.”

(Stage 1 focus group)

“I sometimes feel that they're way too unwilling to part with their money, it almost always takes so long for refunds to process.”

(Stage 1 focus group)

Complicated price structures raise suspicions of ‘being ripped off’

- When considering rail prices, passengers look at the time/distance covered and/or how much it would cost to travel by another means:
 - Generally trains are considered to be expensive.
 - The cost can prevent some people travelling when/how they want to.
- Inconsistent and opaque pricing structures add to a feeling that price is not related to service, and that the system exploits captive audiences:
 - Passengers feel that the increase in the price of rail travel over time has not been accompanied by improved experience.
 - Being presented with very different prices for two similar length journeys leads passengers to question the logic of the pricing system.

“It costs my daughter so much to go down to London and she has to stand the whole way.”

(Stage 1 focus group)

“Sometimes it’s cheaper buying 2 singles than a double... It shows they don’t have a good strategy and they don’t have the public’s interest at heart. They are trying to catch you out.”

(Stage 1 focus group)

“There’s been a massive increase in train fares but I haven’t seen an increase in the level of service so I don’t see how they can justify that when it’s getting worse not better.”

(Stage 1 focus group)

While not necessarily common, negative experiences are still regarded as significant because of the impact they have

While many have numerous positive associations with rail:

- Friendly station and train operator staff.
- Train travel often being faster and more relaxing than alternative forms of transport (e.g. travelling by car).
- Advance tickets can sometimes feel like value for money.
- More choice in how you buy and carry tickets (i.e. apps).



These are often outweighed by the experience of when things go wrong:

- Delays can have a significant negative impact on a passengers' day – on their plans and on their mood.
- Repeated negative experiences (e.g. timetable issues/industrial action for commuters) causing problems with work, home life and mental health.

Ultimately, there is a widespread perception among passengers that they are not at the heart of decision making

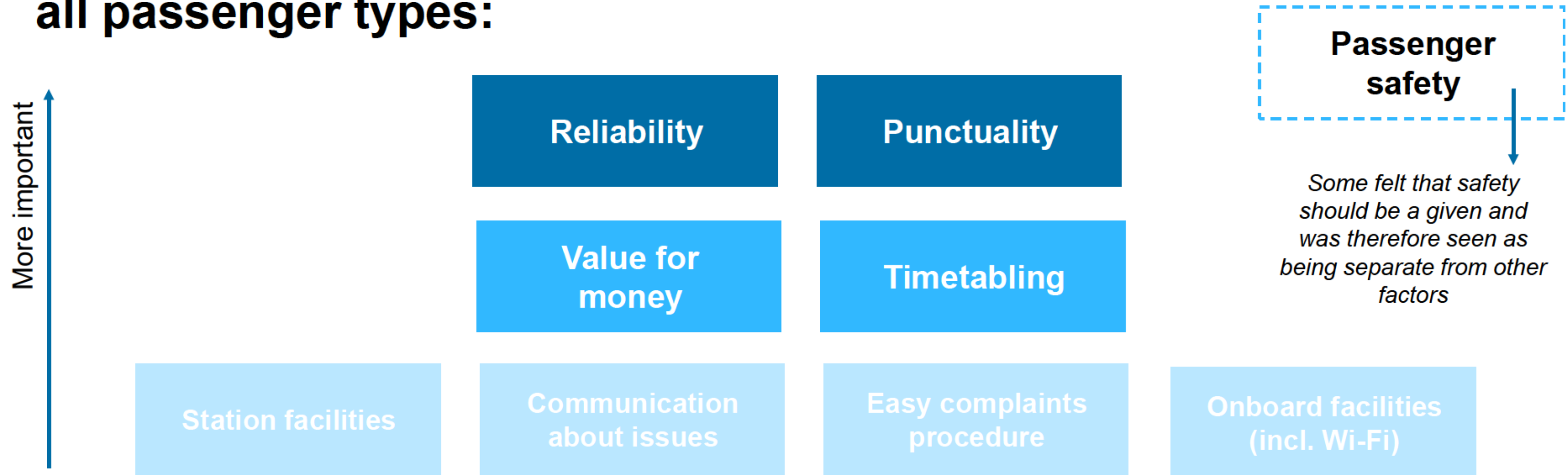
- Those involved in running the rail network are not seen to be prioritising the passenger experience.
- Train journeys are often considered to be stressful, and many of the key factors contributing to stress are felt to be things that the train operators can control.
- Above all else, TOCs are seen as motivated by making profit.

“Their motivation is greed and making profit. It appears that as long as they make profits, there’s very little attention on the passenger.”
(Citizens’ workshop)



“They’re driven by profit and paying shareholders. This means high prices and poor service.”
(Citizens’ workshop)

Looking to the future, above all else, ensuring that the railway is reliable and services run on time are the biggest priorities across all passenger types:



NB. The issues of ‘passenger voice’ and ticket retailing (both tested in stage 2) did not spontaneously come up as priorities for passengers.

04 Attitudes towards proposed system changes

4.1. Changes to rail structures

4.2. Changes to commercial arrangements

We provided participants with the following information about a new proposed public body with responsibility for the rail network

A possible future rail model: establishing a single public body with overall responsibility for the rail network

- This public body would be at arms length from central government
- This could help to simplify the system and address current issues about how the rail network runs

- A public body responsible for the rail network, including timetabling, fares, maintaining tracks and trains



Train companies make day-to-day decisions – except about fares

Overall, participants are very positive towards the idea of the new agency – although had some questions about how it would work

- There is a strongly held perception that the current system is not delivering good services for passengers.
- As such, there are high levels of positivity about the creation of the agency and to ‘doing things differently’.
- It was hoped that the new agency could potentially simplify the system, and decrease fragmentation:
 - Although a small number of participants did initially express concern that introducing another player into the system would add to confusion and fragmentation – particularly in relation to accountability and passenger complaints.
 - Despite being in favour of the idea of a new national body, concerns were expressed about the new agency being slow and bureaucratic (mainly due the perception it would be a large organisation); having an impact on the speed of response to passenger complaints.

"It could solve the problem of the disjointed system. It seems like you would be able to get a more consistent standard, price and service across the country." (Citizens' workshop)

Spontaneous questions from participants


- Which organisations would the new public body replace?
- Will taxpayers'/passenger costs increase?
- What will happen when companies fail?
- Where will the funding come from?
- How much power will they have?
- What was the DfT's reaction to the proposal?

We also tested responses to two potential options for the structure of the new public body

A. The national model


Model A: National Body

In practice, Model A would mean that...




Accountability

- A national body will be accountable for everything passenger-facing, including the quality and reliability of train services, customer service and facilities at stations
- If anything goes wrong, passengers will only ever need to interact with the national body



Fares

- All fares will be set by the national body, rather than by politicians
- Oyster-style ticketing will be available in all major urban areas
- There will be a more consistent approach to fares across the UK




Train, track & station

- Train, track and stations would be managed by the same organisation
 - Improving accountability – as one agency is responsible
 - Passengers can be updated more quickly if things go wrong, improving communication

Model A: National Body

Model A would be structured around a single national body that is responsible for Britain's railway

- The **National Body** would coordinate and procure *all* rail services across the country
- There would be regional teams responsibility for rail services and tracks in each region – but these would all be part of the same organisation
- Train companies would run the train services on a day-to-day basis

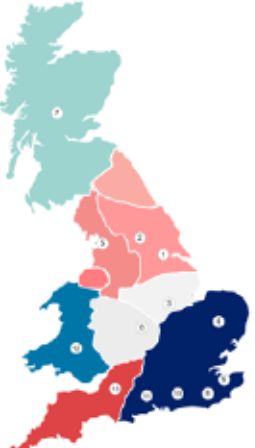


B. The regional model

Model B: Regional Rail


Model B would be structured around a number of regional bodies responsible for Britain's railway

- Each of these regional bodies would be separate organisations, responsible for managing local train services within their region.
- There would be a national body that would coordinate all the regional bodies, and manage long distance train services (that sit across regions)
- Regional infrastructure managers would take decisions about infrastructure




Model B: Regional Rail

Model B would mean that...




Accountability

- Regional rail bodies will each be accountable for passenger-facing services in their area, including the quality and reliability of train services, customer service and facilities at stations
- Regional rail bodies will set timetables and fares, which means customer may get more locally relevant services (though changes likely to be minor)



Fares

- Regional rail bodies will set fares for their region
- There may be different fares in different regions, which could be:
 - More locally relevant
 - Inconsistent

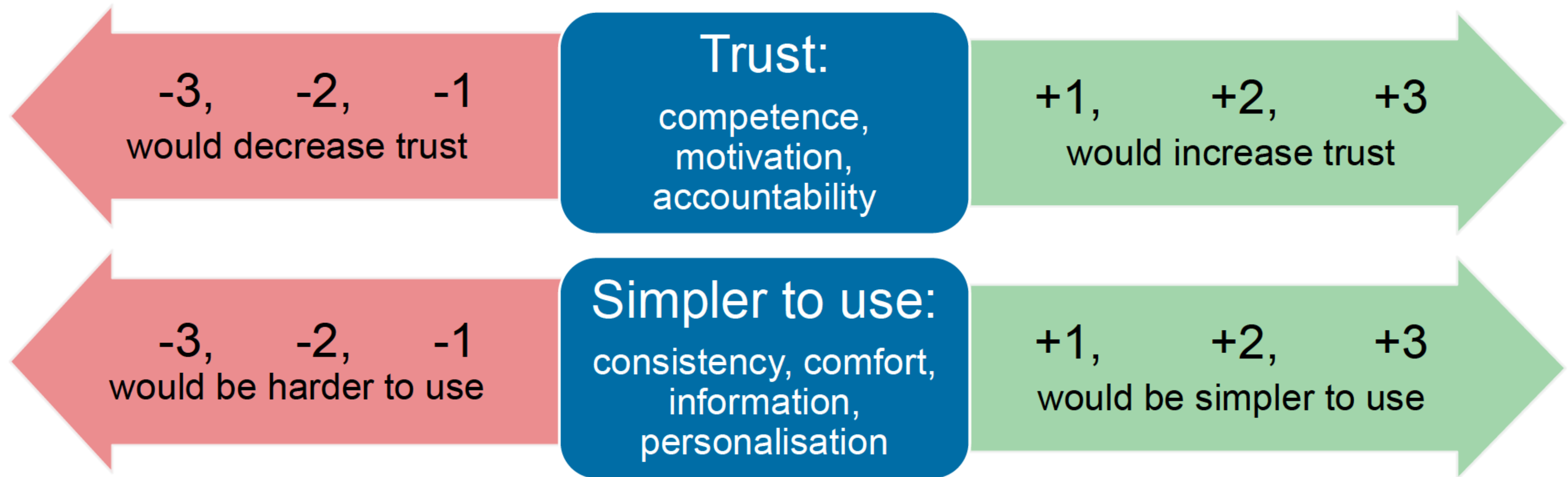


Train, track & station

- Regional rail bodies will operate train services, whereas separate regional infrastructure managers will make decisions about the track
 - ...trains will not be fully integrated with track and stations
 - ...infrastructure decisions may be more locally sensitive

N.B. If passengers are travelling across regions (e.g. travelling from London to Cardiff), the national body will have responsibility

Participants were asked to score each model on the degree to which it would improve *trust* and *simplicity of use*, compared to the current system



1: A definition of trust was provided to participants, based on previous research carried out for DfT. Participants were asked to consider the following dimensions of trust: competence; motivation; accountability. 27

2: A definition of 'simpler to use' was provided to participants, based on previous research carried out for DfT. Participants were asked to consider the following dimensions: consistency, comfort, information, personalisation.

Overall, the national model is more positively received than the regional model



The national model

- On the whole, participants expect that the National model will:
 - reduce fragmentation.
 - provide greater accountability.
 - make fares and ticketing simpler.
- The idea of more regionally devolved, localised control of the rail does not resonate strongly with most participants.
- Regional pride is more prominent in one group and they like the idea of regional and local sensitivity in the regional model.
- That said, across the board, most feel that regional sensitivity could be achieved under the national model by leveraging the knowledge of regional staff within a national body.

"I think with [the national model] there would be greater consistency in process."
(Stage 2a extended focus group)

"[The regional model] feels like there are too many cooks, equaling more confusion."
(Stage 2a extended focus group)

"One company means no buck-passing."
(Stage 2a extended focus group)

The prompted benefits of the **national model** are expected to help address consistency issues identified in the current system



For most

- Having one national body is expected to:
 - Help increase the consistency of pricing and service delivery.
 - Make communications between different branches of the network more streamlined.
 - Be a more streamlined process for the passenger.
- The suggestion that PAYG could be standardised across all urban towns in the UK is well received.
- For a handful of participants, this model is well-received initially because it is perceived to be a step towards re-nationalisation – which is something participants would support.



For some

- There is concern among a minority of participants about whether a national body would become too large to act efficiently.
- These participants tend to perceive bigger organisations – in general – to be more bureaucratic, and less able to act swiftly.
- They expected that bringing the rail network under one organisation might result in:
 - Slow decision making, meaning service improvements might take longer to implement.
 - Slow responses to customer complaints.
 - Slow responses in the event of emergencies.

The **regional model** is seen to be comparatively more complex, with fewer benefits perceived to respond to current concerns



For some

- Some participants, especially those in more rural locations, feel the regional model would in more tailored regional decision making.
- Passengers cited specific examples where local residents were not being listened to around re-opening a station – they felt their voices may be heard under a regional model.

On reflection, participants who are initially supportive of regionalisation feel that the advantage of locally-sensitive decision-making could be built into the national model by having dedicated regional teams, responsible for understanding the needs within their local areas.



For most

- The regional model is felt to perpetuate a sense of fragmentation through the inclusion of multiple regional bodies, with train, track and stations being managed differently, and lack of consistency in fares and pricing.
- Participants expect that having multiple regional bodies could result in disjointed decision-making.
- And participants expect that should anything go wrong on cross-region trains, regions may deflect responsibility.
- It is also felt to be confusing to have a national body as the point of contact for complaints on journeys across regions, and the regional body as the point of contact for complaints on journeys within a region.

As a result, the national model receives higher scores in relation to both trust and simplicity of use

Trust

National model

1.31*

- Expected to have a positive effect on ability to run a competent and efficient service by:
 - Having a streamlined approach to managing the railways.
 - Increasing accountability.
- Some raise general concerns about the efficiency of large, centralised organisations.

Regional model

-0.06

- Participants are more likely to say Model B would have a negative impact on trust, due to expectations there would be:
 - Greater fragmentation.
 - Lower accountability.

Simple to use

National model

1.63

- Perceived to be simpler to use due to:
 - Ability to contact the same organisation regardless of the journey or TOC.
 - Being easier to access information needed before, during and after travel.
 - Standardisation of PAYG in urban centres across the UK.

Regional model

-0.38

- Participants are more likely to give a negative score:
 - Feeling it would make little difference to their travel.
 - Unsure how any benefits would play out in practice and of the extent of their impact.
 - Feeling that separate bodies make it more complex to use.

04 Attitudes towards proposed system changes

4.1. Changes to rail structures

4.2. Changes to commercial arrangements

We also spoke to participants about changing commercial arrangements from a revenue risk model to a performance based model

In the current system, train companies each bid to run sections of the railway, and make money by getting high passengers numbers



The train operating companies (TOCs) pay a fee to the Government to run a certain service (e.g. Birmingham to London) or the TOC offers a level of subsidy required to run the service (i.e. the lowest level of subsidy would win)



These companies then make their money back by passengers paying to use their service. They increase their profits by increasing passenger numbers



In theory, this should incentivise companies to improve the service they provide to make it as attractive as possible to potential passengers

The Williams Rail Review is currently considering changing the way that train companies are incentivised – to a system that is more heavily based on their performance

This is an opportunity to change train companies' targets – so that targets are more closely related to their performance in specific areas, such as passenger experience.

Participants feel positively towards the proposed change from a revenue risk model to a performance based model

- Some people are dissatisfied by how TOCs are currently incentivised in the revenue risk model, as they perceive the majority of passengers to be a captive audience with limited alternatives:
 - The penalty for running a poor service is therefore seen as inadequate, as passengers do not see passenger numbers as being closely related to performance.
- Instead, participants think the performance based model seems much better able to link performance to profit, ensuring better outcomes for passengers.

“My commute is the worst part about my day. I don’t have a choice, it’s the only way for me to get in. I can’t remember the last time I got a seat.”

(Citizens’ workshop)

“It makes sense for train companies to be judged on what it’s like to travel with them as a passenger. It feels like they’ve just been able to do what they want for too long.”

(Citizens’ workshop)

Penalising TOCs for poor performance is also seen as an effective way of improving standards and the passenger experience

- Participants were asked to identify their top five priorities for rail and to design a new incentivisation model for TOCs:
 - Prioritisation is determined through a bonus and penalty system.
- Safety, reliability and fair pricing are consistently named as priorities by participants:
 - These are seen as basic minimum requirements for rail travel.
 - As such, passengers want to see TOCs receive significant penalties if they did not meet targets for these.
- Communication from TOCs, train cleanliness and train / station facilities are also commonly prioritised but are less likely to be heavily penalised.

WORKSHEET 3 Your incentivisation model for rail companies

Your priorities	Bonus	Penalty	Please explain your reason for allocating tokens in this way
Reliability 85% - more than 85% of the month	+	-10	No bonus - because they should do on their own anyway
Price consistency, no increase to consistency	+	-5	
Satisfaction when arriving at destination	+5	-	Incentive to do
Communication - small	+2	-3	

WORKSHEET 3 Your incentivisation model for rail companies

Your priorities	Bonus	Penalty	Please explain your reason for allocating tokens in this way
Punctuality 90% run of time	+	-5	I don't get paid for being a rail worker - other factors involved (out of control of operators)
Fair pricing - competitive with other modes of transport	+	-3	
Having a seat - 75% of the time	+	-3	Hard to measure. A lot of investment in new seats/regular updates
Station facilities + accessibility	+	-5	Safety in the station is a necessity
Safety - of trains + infrastructure	+	-10	Paramount
Safety - Staff presence to stop theft on train in stations	+	-5	Train operators don't always have control

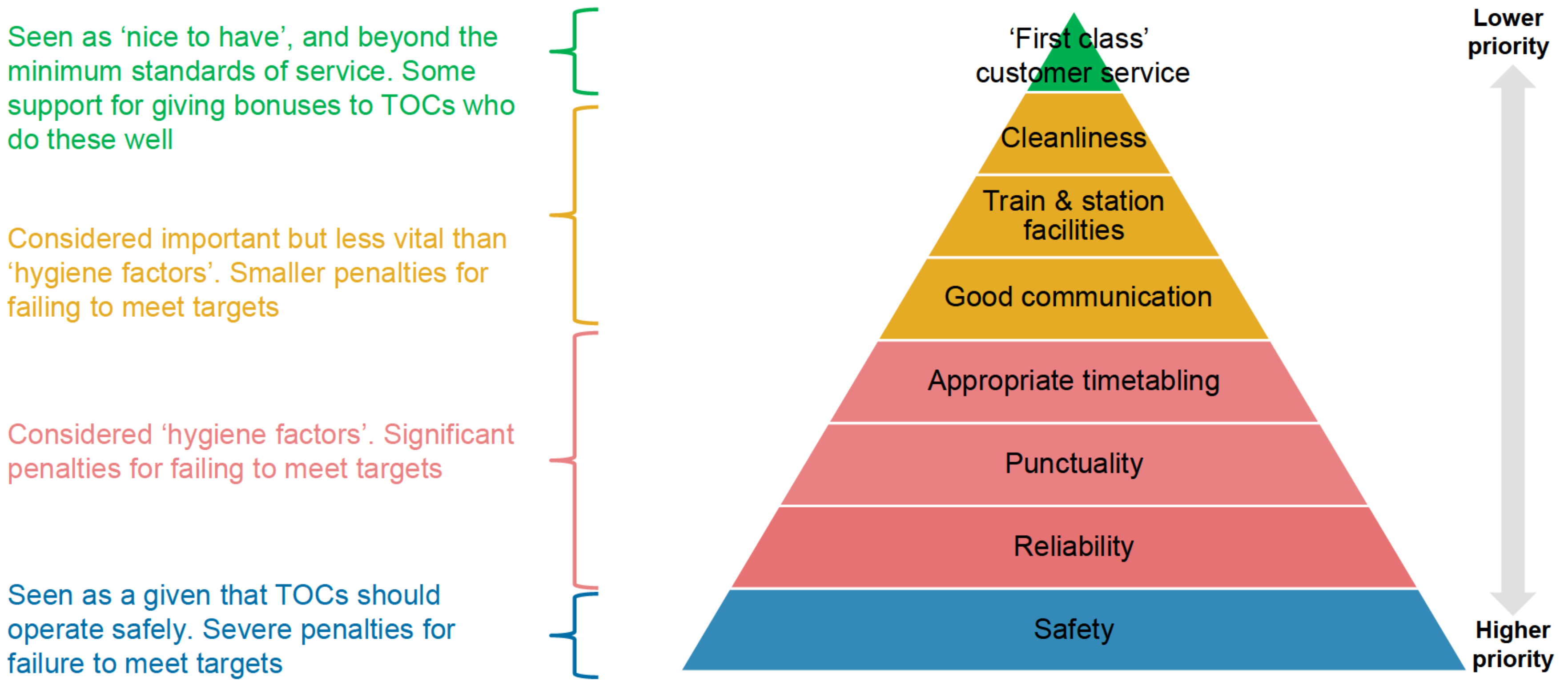
However, there is negativity towards the idea of giving TOCs bonuses for meeting targets – except in areas seen as ‘going above and beyond’

- There is widespread negativity towards TOCs ‘being rewarded’ through bonuses for meeting what are seen as minimum standards - this includes reliability, punctuality and safety for most.
- In the context of the rail system being seen as having performed very poorly for passengers in recent years, some participants thought TOCs should not receive *any* bonuses for good performance.
- There is also negativity towards giving bonuses for factors seen as important to the passenger experience when using the train / station including cleanliness, facilities on board / at stations and communication when there is disruption.
- Bonuses are generally only felt to be acceptable in areas that are seen as going above and beyond these:
 - Bonuses were suggested for things seen as ‘nice to have’ such as ‘first class’ customer service.

"Reliability was our first one. I don't think they should be given a bonus for providing a reliable service, but if it goes wrong, they absolutely should be penalised." (Citizens' workshop)

"They should be made to prioritise having up-to-date trains and stations that feel safe and secure. Feeling safe in the environment you're in is important." (Citizens' workshop)

Priority metrics for a performance based model



05 Rail Body Characteristics

Participants were asked to consider what the new national agency would be like if it were a person

This exercise enabled people to imagine what kind of characteristics they would want the agency to have:



Core characteristics that the new national agency should seek to embody through generally fell under four themes:



**Holding TOCs to
account**



**Putting the
passenger first**



**Focussing on
improving the
railway**



**Having relevant
expertise**



Participants want the new agency to be able to hold TOCs to account by:

- Being able to enforce universal rules and standards.
- Making tough decisions which could have consequences.
- Commanding respect from TOCs so they know they have to meet targets.

“They would be a big, strong, fearsome bear.”
(Citizens’ workshop)

“I’d want them to tell people off when they need to.”
(Citizens’ workshop)

Participant suggestions:

Firm

Authoritative

Command respect

Strict

Unafraid

To the point



Participants want the new agency to put the passenger first by:

- Listening to and prioritising passengers.
- Being visible and approachable so that passengers can share their views and get in touch when things go wrong.
- Communicating effectively with passengers to provide important information.

*"I want to feel comfortable going to them with my complaint."
(Citizens' workshop)*

*"They would be fair and compassionate."
(Citizens' workshop)*





Participants want the new agency to focus on improving the railway by:

- Being decisive to ensure improvements are made.
- Being dedicated to a common goal and to seeing improvements through to completion.
- Being proactive and planning ahead for improvements that need to be made.

*"They would take the train themselves – so they weren't a hypocrite and they knew what it's like being a passenger."
(Citizens' workshop)*

*"He loves it, he loves work. He's totally dedicated."
(Citizens' workshop)*

Participant suggestions:

Decisive **Committed**

Dedicated

Proactive **Strong-willed**

Trustworthy



Participants want the new agency to have the relevant expertise:

Participants want the agency to:

- Take their responsibility seriously.
- Be knowledgeable about rail.
- Be experts who are capable of making the right decisions.
- Passionate about improving the rail network.

*"They'd need to have a background in the rail."
(Citizens' workshop)*

*"They'd be a train spotter."
(Citizens' workshop)*

Participant suggestions:

Smart

Serious

Knowledgeable

Passionate

Expert

Technical

Innovative

06 Passenger voice

The idea of influencing institutions and decisions is regarded from a consumer perspective, rather than a citizen perspective

- Spontaneous examples of ‘customer voice’ also include consumer reviews.
- The idea of *passenger voice* is widely interpreted as passengers being able to complain, and for companies to respond adequately to these complaints.
- There is greater familiarity with ‘consumer rights’ than civic engagement.



tripadvisor

"TripAdvisor is an example. It's very public and you can see other people are reading it. Restaurants respond."
(Citizens' workshop)



"I got some shelves from Ikea, and they emailed me a survey asking what I thought of my shopping experience and the product."
(Citizens' workshop)



vodafone

"Anytime you phone anyone these days, you have to give feedback, like your phone provider or the NHS."
(Citizens' workshop)

The concept of passengers having a role in wider decision making about rail is not top-of-mind

- Participants tend to assume that organisations aren't interested in their views nor that they take passenger views seriously:
 - This is particularly true in relation to rail as passengers do not see themselves as being at the heart of decision making.
- Passengers also have little to no experience of being consulted on decisions made by organisations.
- And also often feel they don't have the expertise to take a view on major decisions.

*"I don't think they ever do anything about it. If you have a bad meal in a restaurant you don't go back, unfortunately you can't do that with a train."
(Citizens' workshop)*

*"I think they just publish the figures but nothing actually changes as a result of it but at least, I suppose, it helps with the statistics."
(Citizens' workshop)*

We showed examples of the different ways in which rail passengers are currently consulted

Public engagement can happen in more formal ways

 transportfocus

Every year, Transport Focus consults over 50,000 rail passengers to produce the National Rail Passenger Survey, which is a picture of rail satisfaction across different networks. It looks at:

- Overall satisfaction with journey
- Satisfaction with station
- Satisfaction with the train they boarded
- How well rail companies deal with delays

 Department for Transport

In 2019, DfT ran a public consultation on the extension of PAY-G into commuter areas in the South East. Passengers were consulted in tandem with other bodies, e.g. local authorities.

... and in less formal ways

 EAST MIDLANDS TRAINS

East Midlands trains run post travel surveys as a quick and easy way to give feedback. They also host over 1,000 mystery shopping visits every year.

 crosscountry by arriva

Since 2017, Cross Country Rail has had a customer panel to allow passengers to have their say about CC's service and its future plans. Over 2,000 people have signed up.

 GWR

Great Western Railway, among many other services, offers 'Meet the Manager' meetings at stations across its network. These go alongside their regional Customer Panel meetings.

While passengers rarely have experience of being consulted by rail organisations, it is considered important

- Participants have very little awareness of activities such as station manager meetings and public consultations through e.g. online surveys, post-travel surveys:
 - Only a handful of participants had experienced one of these forms of consultation.
- But when prompted, participants see the public **being involved in decision making as important**. It is felt that:
 - Customers should be the focus of the service they use, especially where people have no suitable alternative.
 - Lack of consultation has led to decisions that impact passengers for the worse.
 - Taxpayers have a right to be consulted on how their taxes are spent.

“It shows they're interested, regardless of whether they act on it.”
(Citizens' workshop)

“Yesterday, if there had been a conductor on the train, with all the stuff that was going on, I would have told him. It's not the same online.”
(Citizens' workshop)

The most important issues for participants to be consulted on are those they feel have the greatest, most direct impact on them

Timetabling changes

- Passengers feel they are well placed to comment on timetabling and potential impacts of changes:
 - For commuters, timetable changes have the potential to add time to their journey and, if services are cuts, add to issues with overcrowding on trains / in stations at peak times.
 - For leisure travelers, changes could affect their decision or ability to travel by rail e.g. time of the last train home.
- Passengers feel they can also provide valuable information about how busy trains are and wider context (e.g. traffic conditions) that might not be available to rail organisations.

“We all have different timetables and it would make us more heard as individuals.”
(Citizens’ workshop)



Increases to fare prices

- Fare pricing is a key concern, especially for those who have no choice but to travel by rail and for those who use trains frequently.
- Fares are also seen as having a significant impact on the cost of living (especially for commuters) – high fares can have knock-on impact on other aspects of life.
- Passengers therefore want to be consulted on fare pricing so they can communicate the impact any changes would have on them.

“Pricing is really important because that’s where it all starts, when you buy your ticket.”
(Citizens’ workshop)

Participants feel they are best placed to influence and inform decisions at a local level

- Decisions relating to what happens at a local station or on a local route are seen as decisions that participants can have an informed opinion on.
- This could include decisions relating to:
 - Provision of facilities at a station (e.g. toilets, parking, bus stops).
 - Accessibility at a station (e.g. facilities for disabled passengers).
 - Timetabling on local routes.
- However, for most participants, within the current rail system local level issues are seen as lower priority than reliability and fare costs:
 - Therefore, many feel that they would be unlikely to engage in this type of decision making.
 - The exception to this is passengers with mobility issues / disabilities for whom accessibility at their local station and on their local route is a higher priority.

“I have an opinion on the car parking at my station in that there are definitely not enough spaces.”
(Citizens’ workshop)

“I don’t really mind where they put the bus stop outside the station, although some might, but I do want to know I can get to work on time.”
(Citizens’ workshop)

Views on whether passengers should be consulted on larger, more structural issues are mixed

- It is felt that structural issues, such as the awarding of a rail franchise, have the potential to impact passengers greatly – particularly those who travel frequently:
 - They, therefore, see it as important to be consulted on these types of issues.
- However, other participants feel they do not have the expertise to feed into these types of decisions in a meaningful way:
 - And therefore see public consultation on these issues as being less worthwhile.

“Sometimes they don’t communicate issues well enough for everyone to understand and be able to make a decision.”
(Citizens’ workshop)

“Isn’t it the DfT’s job to make that call?”
(Citizens’ workshop)

Participants also see the benefits of having a mix of consultation methods, allowing people to get involved in the way that suits them

Barriers to passenger engagement

Perceived time commitment & concerns of unrepresentative feedback.



Participant suggestions for consultation

- Offering incentives to participants such as a free coffee on the train / at the station for less involved engagement and cash incentives for those who take more time out.
- Consulting passengers through train apps or ticket buying websites.

"Maybe if you're buying a ticket on the Trainline app, something pops up and says 'they're planning on closing this route, have your say now.'"
(Citizens' workshop)

Not wanting to be 'disturbed' during travel or not feeling inclined to share views in the moment.



- Permanent suggestion boxes or iPads at stations.
- Engagement activities onboard trains or at stations being well advertised in advance of the event, to allow passengers to build in extra time to their journey.

"Have a notice board at the station. If you're getting the same train every day, you're gonna care."
(Citizens' workshop)

A perception that public consultations are a 'tick box' exercise and feedback is not always taken on board.



- Communication from TOCs / National Rail clearly demonstrating how passenger feedback / input has shaped the outcome of a decision.

Formal consultations are seen to be the best way to gather the passenger perspective on rail issues

- More formal forms of consultation such as workshops and focus groups are felt to offer the best way to gather a broad range of views:
 - Recruiting to a specification and incentivisation of participants are felt to ensure a mixture of people would be able to take part.
 - There is some sense that any feedback would be more balanced and considered.
 - And participants also say it's vital they feel listened to, meaning some initially prefer the idea of being consulted face to face, rather than online.
- As well as passengers, some would also like to see frontline staff and taxpayers involved:
 - Some think that frontline staff would have the best sense of what is working well and less well.
 - And that taxpayers should also be consulted due to their financial contributions to the railway system.

"Formal is more accurate and you get better feedback."
(Citizens' workshop)



"I think [taxpayers] should be very involved, they're paying towards it at the end of the day, even if they're not using [trains]."
(Citizens' workshop)

There is enthusiasm toward the concept of the public being involved in decision making – but a need for reassurance that involvement will be worthwhile

Although participants see the public involvement in decision making as important, their starting point is:

- Not being used to being asked to feed into decision making.
- Feeling that their only recourse to action is complaints.
- A perception that some public consultations are ‘tick box’ exercises and that public feedback is not always taken on board.



To ensure effective input from the public, the consulting body needs to reassure the public by:

- Demonstrating to passengers how their views will impact decision making: on the ‘big’ issues as well as the ‘small’ or localised ones.
- Using consultation methods that reflect passengers’ preferences, and raising passenger awareness of these mechanisms.

07 Ticket Retailing

7.1. Attitudes towards different retail options

Previous research revealed that many passengers, particularly infrequent passengers, find the current pricing system to be unfair and hard to navigate



Fairness

- x Suspect current pricing system may exploit captive audiences.
- x Different passengers charged different prices for same service.



Transparency

- ✓ Costs are upfront, clear and have no 'hidden costs'.
- x Language describing different types of journey and ticket felt to be confusing.



Simplicity

- ✓ Purchases for routine journeys are easy to make.
- x But for those less familiar, fare options are not easy to understand or easy to navigate.

Whilst the pricing system feels complex and difficult to navigate, how tickets are sold is seen as straightforward

- Passengers are generally content with how they currently buy tickets:
 - Passengers are much more concerned with the current pricing system (as highlighted in our previous pricing research).
- This is not to say that passengers have a full and nuanced grasp of the ticketing retail system. For example, some passengers:
 - Are unaware of booking fees for third party retailers.
 - Believe third party retailers to offer cheaper tickets than all other retailers.
 - Do not distinguish between TOC ticket websites and third party retailers such as the Trainline.

*"After I bought a ticket I always wonder if I could have had a cheaper ticket."
(Citizens' workshop)*

*"[The booking fee] doesn't make sense to me. It seems like a scam, everybody seems to be making money out of it."
(Citizens' workshop)*

Third party retailers are perceived to offer an easy way of buying and using tickets by those who use them

- Trainline is the most used third party retailer and is seen as particularly easy to use.
- High-quality third party retail websites are liked by those who use them because of:
 - The perceived ease of comparison of different fares.
 - Electronic ticket fulfilment (i.e. barcode mobile tickets).
 - Online purchase meaning passengers can avoid queues to buy tickets at train stations.
- Most say that they are happy to pay a booking charge for the service they feel they receive:
 - Some users of third party retailers were unaware they charge a booking fee but when made aware of this fact, were happy to pay the charge.



"I love it, I can buy a ticket on my phone while I'm on my way to the station and just walk past the queue."
(Citizens' workshop)

"They're providing a service, they have a right to charge a fee for providing that service."
(Citizens' workshop)

Participants see a role for all retail options including face-to-face (e.g. ticket offices), self-serve machines and onboard the train

Beyond third party retailers, it is felt that different retail options cater to different groups and preferences:

Self-service machines



Seen as useful for:

- Those in a rush.
- When tickets can't be bought at a ticket office e.g. when its closed.
- Shorter journeys.

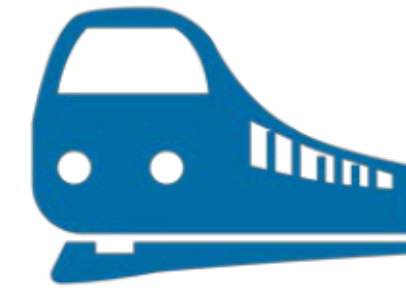
Face-to-face



Seen as useful for:

- Those who want face-to-face interaction.
- People who struggle to book online / use self-service machines.
- Longer / complex journeys, where staff can advise on the best price.

Onboard the train



Seen as useful for:

- Passengers boarding at unmanned stations.
- When no other options are available in the station e.g. the ticket office is closed, self-service is broken.

However, there was significant confusion among passengers about whether you could purchase tickets onboard – many thought they would be penalised for boarding a train without a ticket.

Developing ticket retailing by offering greater information, packages and loyalty schemes are seen as ‘nice to have’

Increased
information
provision

Ticket packages

Loyalty schemes

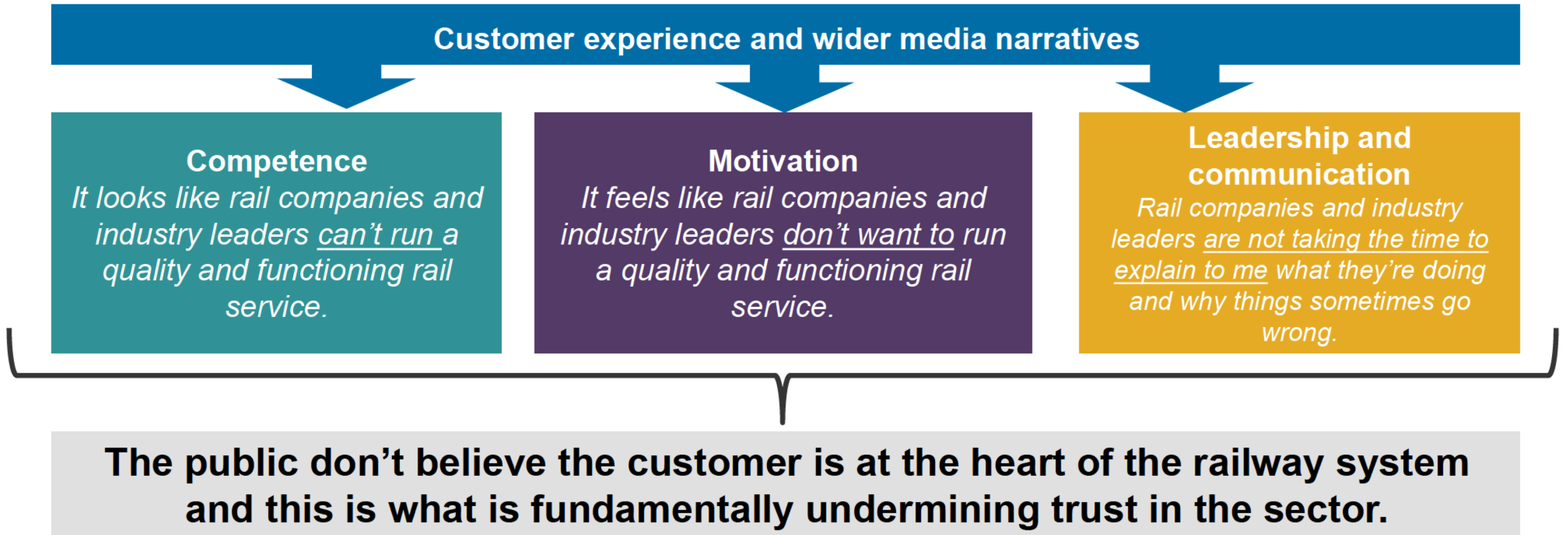
- Advancements in ticketing in recent years including the introduction of e-ticketing and QR code tickets are welcomed by participants.
- But the offer of greater information, packages and / or loyalty schemes is not seen as a priority for improving the railway:
 - These innovations are not seen as addressing a core challenge that passengers face (such as reliability, cost).

*"It's good in the [ticketing] app, because they might not have a printer. Saves paper as well."
(Citizens' workshop)*

*"You don't want page after page of extra things [when buying a ticket]."
(Citizens' workshop)*

08 Conclusions

Both stages of research found trust in the rail is low, and building it will require action on several fronts



There is some cautious optimism among participants that the proposed new national agency could address some of these problems

Competence

- Be able to set consistent standards / targets.
- A single body responsible and driving forward improvements.

Motivation

- Be able to incentivise TOCs with targets that put passengers first.
- And hold them to account when these are not met.

Leadership and communication

- A single organisation who is responsible when things go wrong.
- A clear place for passengers to go with complaints.

Participants also have some clear watch outs for this new national agency



Always be listening to passengers



Don't become, slow moving and bureaucratic



Be regionally sensitive



And control fares

Passengers will need to be convinced that this new national agency is truly putting them at the heart of decision making

Challenge

Participants want this new agency to be listening to them and passenger-focused.

But...

Are unaware of opportunities to engage in decision making and are sceptical that their voices will have a genuine impact on important decision making. However, most people don't really want to be involved in this decision making process.

Opportunity



- The shake-up may be an opportunity to introduce passengers to different ways of having their voice heard beyond the complaints procedure.
- To instill confidence, the new agency could be vocal about a commitment to consult regularly on the things that matter most to passengers, and to show how customer views have influenced the service.

However, success for this new national agency in the public's eyes will ultimately depend on its success at addressing passengers' key concerns

