

Bus driver training

What works? What next?

July 2015



1. Introduction

It may be surprising to think that an industry started in the 19th century is still just as relevant and vital to the 21st century. Buses continue to provide access to work, healthcare, shopping, education, leisure and other vital services. In fact, as the population ages and many older people give up their driving licences, and now that many younger passengers are not able to afford the cost of running a car, it is arguable that bus services are becoming even more important. As we consider our crowded metropolitan road networks, isolated communities that rely on the bus, and the need to reduce pollution, it is clear to see why buses still play a vital role in Britain today.

A lot of things have changed since the first horse-drawn omnibus service was introduced to the UK in 1824. Diesel and alternative-fuelled vehicles offer a reliable, smoother, warmer and more comfortable experience. New forms of tickets – including smartcards – have been introduced. And many areas now have electronic information systems. But it is not just technology that has changed. The conductor or the ‘clippie’, as they were known, is a thing of the past. Bus services are now overwhelmingly driver-only operations. The bus driver is now the face of the company and delivers every aspect of the bus passenger’s journey.

The driver is responsible for driving the bus safely, managing passenger disputes and unruly behaviour on the bus, retailing, information provision, first aid, delivering services to all passenger groups with varying needs, and delivering customer service in a pleasant and professional way. Some also ensure the bus is tidy, and check for lost property. They do all of this while dealing with driving hazards, delays and meeting regulatory requirements.

In 2013 we carried out two pieces of research on bus passengers. The first looked at passengers’ experiences with delays and disruption¹ while the second concerned value for money². The role of the driver came through strongly in both. They were seen by passengers as the chief source of information on delays and disruption, as well as the main source of information on the range and price of tickets available. In short, they did much more than just drive the bus.

Recognising the central role of the driver, and the huge impact they have on the passengers’ travel experience we set out to investigate how bus drivers are trained and equipped to take on this wider customer service role. Our aim is to provide information for passengers, but also to support the industry by identifying which factors are most likely to produce positive training outcomes.

We talked to a wide range of bus operator staff such as managing directors, directors, operational managers, bus drivers, heads of training and trainers, as well as other industry organisations. We interviewed senior staff using semi-structured interviews that usually lasted one to three hours (see Appendix 1 for the trigger questions). Beyond this we have been provided with innumerable hours of access to

¹ *Bus passengers’ experience of delays and disruption*. Passenger Focus. April 2013

² *Bus passenger views on value for money*. Passenger Focus. October 2013

the experience and expertise held within the industry. Companies have welcomed us to their training centres, and given us access to their training materials. We have been given open access to all areas of training. We have watched training sessions, and talked to trainers. There was even an opportunity to drive a bus (off road) and get a small insight into the challenges bus drivers face. A full list of those participating is available at the end of this report (Appendix 2). We also received offers of support from other operators which due to time constraints we were unable to take up. In addition to input from the industry we have reviewed our own research data, verbatim comments from passengers, and used our own observations in putting together this report.

2. The changing role of the driver

During the last century the removal of the conductor from bus services created a profound change to the role of the driver. The team work of conductor and driver changed to a solo role. The sole focus on driving changed, as fares collection, information provision and passenger security became amalgamated into the driver's job. During this period there was a shortage of bus drivers, and most companies struggled to fill vacant posts. The key recruitment issue was getting enough drivers, and preferably ones with a licence to drive a bus. However, as the recession hit, recruitment became less problematic, allowing bus companies to increase their focus on the customer service element of the role.

Operators describe the drivers' role in different ways, but the underlying message is the same. It focuses on customer service.

- To "Deliver customer service by driving a bus... delivering quality and good value."
- "This job is not just about driving. Delivering safe journey and good customer service are just part the same thing."
- "A driver is an ambassador. He should make them [passengers] feel understood."
- "Retail assistants who drive."
- "Once they stop driving (i.e. at a bus stop) they become customer service."

Bus companies acknowledge that drivers are the face of the company, and for passengers the driver is often the only contact with the operating company. This role is especially important because in many cases it is easier to retain current customers, than it is to persuade new people to leave their cars and use the bus. Customer retention depends on a reliable service, but this alone does not make bus travel a mode of choice, or a pleasant experience. The attitude of the driver, and the service they provide, is a critical factor.

Operators frequently say that drivers who deliver good customer service give them a commercial edge over competitors.

***"Customer service is not a nice to have, it is also a commercial imperative."
"If we are going to get people out of their cars we have to differentiate ourselves."***

Operators

A number of operators told us that in the past the role of bus driver had low status. Management frequently relied on disciplinary measures to try to create change. However, in many cases a new approach is now being taken.

“We used to just hire and fire, but now we seek to develop.”

Operational manager

“The image we have of our drivers is like being an airline pilot. They do the same job and they need to have the same pride in the job. It’s an important job with status... the aim (of our training and management) was to build their self-respect. This in turn helps us to show respect to our passengers. Our staff need to know they are respected. Our values bring us towards each other, trust. Our staff are well informed. They know what it is like to be a passenger. (Before) our managers seemed uncommunicative (with our drivers) but now we have esprit de corps, camaraderie (across the business).”

Bus operator - MD

While many managers grasp the new opportunities, inevitably this willingness is not universal.

“There are still issues with some local management teams who don’t necessarily want to move to the new process.”

Operational manager

Recognising the changing role of bus drivers and using training to promote that change is not without challenges. There are the simple practical ones like releasing drivers from operational duties to attend training, but there are also more complex factors.

Bus drivers are effectively peripatetic workers, who work alone and usually follow a shift pattern that largely differs from managers’ working hours. Added to this the environment in which they work is challenging, varying from navigating rush hour traffic in metropolitan areas, to avoiding horses in the New Forest, with using a chain ferry thrown in for good measure. Their work takes place under the gaze of passengers, but usually far from the management team. There is often an admirable camaraderie and esprit de corps among bus drivers, but all of these factors can also make it difficult to instigate and maintain change. With improved retention, many drivers are staying in the industry for decades. Keeping these experienced drivers in touch with changes is necessary, but complex.

Change cannot be developed simply by training bus drivers in customer service, however good or frequent that training is. Drivers also need support in carrying out their duties and management must ensure that all the business processes support the goals they have set. This issue will be explored later in this report.

3. Passenger satisfaction with bus drivers

Transport Focus carries out the Bus Passenger Survey³ every year. This asks over 45,000 passengers across England and Scotland to rate their satisfaction with their bus journey. It includes several references to the driver, including customer service as well as driving standards. The following areas are found to be important to passengers:

- stopping near to the kerb
- appearance
- greeting and welcome
- helpfulness and attitude
- time allowed for the passenger to reach a seat before pulling away for the stop
- smoothness of ride
- safety of driving.

Passenger satisfaction with bus driver performance

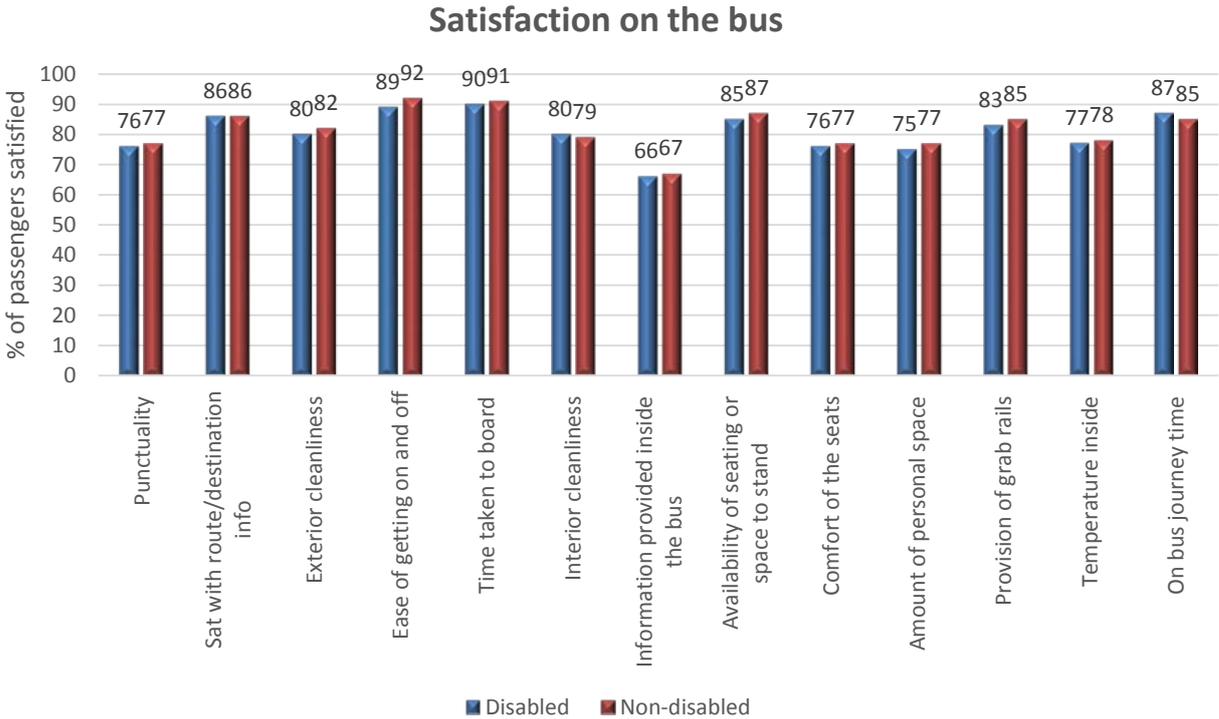
Factor measured (satisfaction presented as a range from highest performer to the lowest)	Minimum satisfaction score	Maximum satisfaction Score	Difference (highest – lowest)
Stopping near to the kerb	87%	97%	10
Driver's appearance	85%	97%	13
Greeting and welcome	60%	95%	35
Helpfulness and attitude	62%	91%	29
Time allowed for passengers to sit before pulling away from the stop	68%	93%	25
Smoothness of ride	64%	88%	24
Safety of driving	77%	95%	18

Bus Passenger Survey 2014

The best operators record very high levels of passenger satisfaction. However, the gap between the highest performer and the lowest is particularly interesting. It is noticeable that the biggest range is recorded in the two elements that might be considered at the core of customer service: 'greeting and welcome', and 'helpfulness and attitude'.

³ *Bus Passenger Survey*. Autumn 2014. Passenger Focus.

Comparison of satisfaction rates for disabled and non-disabled passengers



Not all of the criteria measured by BPS will have equal importance in a passenger’s mind – some things will clearly be of more importance in determining the overall level of satisfaction than others. By identifying those factors that correlate most highly with overall satisfaction it is possible to identify the main drivers of passenger satisfaction.

We can see from the table on the next page that the main drivers of satisfaction are related to the core journey – in other words journey time and punctuality. Driver attributes do feature but at a relatively low level. However, when looking just at the drivers of satisfaction for those who say they are very satisfied we see those driver attributes featuring much more.

In short, this suggests that the bus driver can make the difference between a satisfied, and a very satisfied passenger. It shows that the attitude and helpfulness of the driver can make a genuine difference.

Drivers of satisfaction for fare-paying passengers in England 2013 (top three highlighted in green)

General condition/standard of maintenance	1%
Satisfaction with waiting time	6%
Satisfaction with punctuality	7%
Ease of getting onto/off the bus	2%
Availability of seating or space to stand	1%
Comfort of the seats	4%
Satisfaction with on bus journey time	61%
Satisfaction with bus driver: helpfulness/attitude	3%
Satisfaction with bus driver: smoothness/freedom from jolting	4%
Satisfaction with bus driver: safety of the driving	7%
Satisfaction with value for money (fare payers only)	3%

Drivers that make fare-paying passengers in England very satisfied 2013 (top three highlighted in green)

Information provided at the stop	3%
Satisfaction with punctuality	6%
Satisfaction with route/destination info	3%
Satisfaction with time taken to board	1%
Satisfaction with interior cleanliness/condition	3%
Info provided inside bus	1%
Comfort of the seats	1%
Provision of grab rails to stand/move within the bus	2%
Personal security	1%
Satisfaction with on bus journey time	33%
Satisfaction with bus driver: nearness to kerb	1%
Satisfaction with bus driver: appearance	3%
Satisfaction with bus driver: the greeting/welcome you got	
Satisfaction with bus driver: helpfulness/attitude	9%
Satisfaction with bus driver: smoothness/freedom from jolting	8%
Satisfaction with bus driver: safety of the driving	19%
Satisfaction with value for money (fare payers only)	6%

The BPS survey also allows passengers to make general comments. A large number of passengers provided comments about drivers; sadly the majority are negative. While passengers may be quicker to report negative experiences than positive ones, this cannot be the whole explanation for the disparity. Reading the comments, it is clear to see the impact of the driver's behaviour on passengers. The verbatim comments also provide insight into the demanding environment bus drivers are sometimes required to work in as illustrated by the quote below.

"I want passengers not to be racist to the poor bus driver."

Comments from passengers show what a huge difference good customer service makes, but poor service does not go unnoticed.

- ***“The driver was so polite, helpful and friendly. We wish there were more like him. Two weeks ago the same driver actually waited for my mother who is unable to walk, switched everything off, walked up to her shopping and accompanied her to her seat. What a perfect gentleman. Well done.”***
- ***“The drivers are very helpful and courteous.”***
- ***“Drivers on this route are first class for friendliness, courtesy and helpfulness“.***
- ***“The bus driver was miserable as usual. I don’t normally have issues with the buses, just staff.”***
- ***“Driver failed to stop at two locations because he said he did not hear the bell. I certainly heard it...he departed me 100yards beyond my stop.”***
- ***“They [drivers] rarely greet or are pleasant.”***
- ***“The driver was unfriendly. No thank you or politeness - just aloof.”***
- ***“The driver was rude and seemed to grunt rather than greet.”***
- ***“Employ humans to drive buses not robots built to count the money, and drive from stop to stop with no emotions.”***
- ***"Children and the elderly [need] a bit more time to sit down.”***
- ***“One of your drivers made an 85-year-old woman pay full fare because she could not find her pass.”***
- ***“The notice on the bus said passengers should remain seated after they have rung the bell until the bus has stopped. I am elderly and was taken far beyond my stop.”***
- ***“[The driver] stops near the kerb and expects me to [get on] but I don’t have a kerb lever, so I can’t. A few have been rude and impatient.”***

The type of service being delivered might account for some discrepancies. Peak-time city routes can put the driver under pressure, while off-peak rural routes with a regular driver may offer the opportunity for more interaction. However, this factor alone cannot account for all of the comments being made by passengers.

Satisfaction with the customer service delivered by drivers is not the only factor influencing bus passenger satisfaction. There are indications that the wider behaviour of the company may also be relevant. Recent research undertaken by Transport Focus in the rail industry⁴ shows that trust in service delivery and trust in the relationship with the operator both influence passengers' satisfaction.

One important element of this concerns 'trust in relationship'. Once a reliable service is established as a foundation, it is possible to create higher levels of trust through building closer relationships with customers. The factors that affect this are:

- being truthful
- acting with honesty and integrity
- building long-term relationships
- treating customers fairly
- communicating well with customers.

It is likely that bus passengers have similar views and, if this is the case, it's not unreasonable to conclude that the bus driver may have a key role to play in this regard⁵.

However, simply training drivers to behave in a certain way will not be enough; the whole company and each member of staff need to reflect the above factors, not just the drivers. Drivers may work alone and in isolated circumstances, but they have behaviour role-modelled to them by supervisors and managers and they will be influenced by the core values of the company.

While the industry has rightly focused on driver training to meet the requirement of the Certificate of Professional Competence (CPC)⁶, further focus on training for supervisory and managerial grades of staff might also see a boost to customer service delivery. Creating cultural change across the business is critical, ensuring that managers, policy, strategy and process all support the new role drivers are embracing. To use a football analogy, one person may score the goal, but it takes a team to set it up.

⁴ *Passengers' relationship with the rail industry*. Passenger Focus. August 2014
http://www.transportfocus.org.uk/research/all?filter%5Bmodes%5D=1&filter%5BpublicationTypes%5D=&filter%5Btopics%5D=&filter%5Byear_of_publication%5D=&filter%5Bq%5D=passenger+relationship+with+the+rail

⁵ We will be conducting further research on this issue in 2015

⁶ A mandatory qualification for professional bus, coach and lorry drivers

4. Developing bus driver training

In 2008 compulsory ongoing training for bus drivers was introduced across the European Union (EU). All drivers holding a passenger carrying vehicle (PCV) licence must undertake 35 hours training every 5 years in order for their licence to remain valid. The EU training syllabus sets the following objectives.

European Union (EU) Directive on Initial and Periodic Training

1.1. Objective: to know the characteristics of the transmission system in order to make the best possible use of it

1.2 Objective: to know the technical characteristics and operation of the safety controls in order to control the vehicle, minimise wear and tear and prevent disfunctioning

1.3. Objective: ability to optimise fuel consumption

1.4. Objective: ability to load the vehicle with due regard for safety rules and proper vehicle use

1.5. Objective: ability to ensure passenger comfort and safety

adjusting longitudinal and sideways movements, road sharing, position on the road, smooth breaking, overhang operation, using specific infrastructures (public areas, dedicated lanes), managing conflicts between safe driving and other roles as a driver, interacting with passengers, peculiarities of certain groups of passengers (disabled persons, children)

1.6. Objective: ability to load the vehicle with due regard for safety rules and proper vehicle use.

The objectives of the training as set out in regulations do not entirely dovetail with passenger expectations of the important area of customer service. Only objective 1.5 deals specifically with the driver's interaction with passengers rather than the actual driving of the bus. There appears to be a gap between passenger expectations and training syllabuses as set out by the EU.

However, many bus operators are mindful of this gap and seek to develop training packages that go beyond the minimum standards set down in regulation. This is possible because even though every training course (including centres, trainers and syllabus) must be approved by the Joint Approvals Unit for Periodic Training (JAUPT), there is considerable room for interpreting the EU syllabus⁷. It may be that this leeway for developing training is one of the reasons that we see wide variations in the level of customer service experienced by passengers.

⁷ See <http://www.jaupt.org.uk/> for further details

Training was introduced to improve passenger safety and wellbeing, but it doesn't seem to be changing driver behaviour in all cases. We have heard anecdotal stories of drivers attending training course described as a "tick box exercise that fails to engage drivers". In these cases training courses appear to be more about attendance than achievement. Some in the industry confirm anecdotally that this sometimes happens.

Quotes from industry managers

"I am not sure that we, the industry, have made the most of the opportunities. We haven't used the 35 hours (compulsory periodic training) to change the hearts and minds of the driver. As an industry we are good at technical training, but not how they (drivers) handle and perceive customers."

"Some operators were not happy to see CPT introduced. Another burden... but now it is developing, and people are recognising the opportunities... building on the first five years' worth of training we are developing the second round of training based on what we learnt. It's an ongoing process."

But this is not the whole story. Most operators view the compulsory training as an investment and have an interest in ensuring that it has impact. We have spoken to operators who are investing heavily in terms of money and human resources. They are developing training material, course, trainers and training centres with the aims of delivering excellent customer service and developing commercial advantage. However, beyond this there seems to be a deep-seated professional pride that drives many operators to want to be the best, and deliver the best possible service.

From a passenger perspective the key question is whether the training is based on a clear understanding of passengers' needs and requirements. To use a small example: passengers state they want drivers to look smart – but what exactly does that mean? Some in the industry take the view that polo shirts fade, crease and are not smart, and that the implementation of a more rigid dress policy will make for more satisfied customers. But is this actually the case? Stagecoach Kent and First Suffolk, who have a more limited range of uniform and a more consistent appearance, both recorded overall satisfaction scores for drivers' appearance of 92 per cent in the Autumn 2014 BPS survey. Reading buses, which has a wide range of uniform attire, from suits to polo shirts, scored 91 per cent satisfaction. So it would appear that uniform in isolation is not necessarily the main factor behind satisfaction.

As stated previously, many companies do undertake passenger research, and it may be that some companies have a clear and detailed understanding of what their passengers want. However, this information is not necessarily in the public domain, or widely available; and even if it did exist it may differ by region or route, and by time of day and journey purpose. It seems unlikely that anyone holds a complete and detailed picture of passengers' needs throughout Great Britain.

This begs the question of whether access to more detail on passenger needs and a clearer understanding of the way research is used to underpin what goes into driver training courses could help to push up passenger satisfaction.

Currently all we can observe is that many operators undertake passenger surveys, examine complaints, hold roadshows, etc, and that the information that they gather in some cases does influence training programmes. Further information about the development of training materials is available in section 5.2.

If the detailed picture is not available, the general picture is well understood. Many operators look to other bus operators or service industries to identify the key components of good customer service. However, the operating environment of other service industries varies from that of transport. The main challenge faced by the transport industry, as opposed to other companies, is that of time. The bus keeps moving and the driver has limited time to deliver customer service. Training needs to address this issue. The bus driver has to make rapid passenger assessments, provide information in a concise way and deal with situations in a timely way. The bus driver is always under time pressure to maintain the timetabled service and is virtually always alone. In most cases there is no back up readily available from a colleague. Some, but not all, training courses address this fundamental difference between delivering transport customer service, and delivering the same service in a stationary setting.

5. Current driver training

Many operators now choose to select bus drivers on the basis of their ability to deliver customer service as well as an aptitude for driving. Where new recruits do not possess a public service vehicle (PSV) operator licence then teaching them to drive a bus and ensuring they pass the required tests is naturally a key part of training that is frequently initially prioritised. These functional driving skills are important as they relate to many aspects of passengers' comfort and safety including parking near to the kerb and the smoothness of the ride. While acknowledging this important aspect of training, this report focuses on customer service aspects of training. This is in part because driving skills are technical skills, and can be taught and measured objectively. Whoever the employer is, and in any region, the driving test is the absolute benchmark. Customer service does not have a similar benchmark, and yet the quality of this aspect of training is crucial to the passenger experience.

While there isn't a universal accepted benchmark yet, our discussions with operators suggest it is possible to start to define best practice. The remainder of this report focuses on starting to define best practice in bus driver customer service training.

There are four fundamental pillars on which training rests.

- recruitment and driver development
- development of training and training materials
- development of trainers
- development of a customer service focused organisation (systems, programmes and policies that support bus driver training objectives).

Each of these elements will be considered in turn, but before looking at detail an overview needs to be considered.

Training offers huge opportunities, but it is also highly demanding. The bus industry is expert in running bus services and operators have considerable experience in delivering technical training, for example in teaching driving skills, the use of ticket machines, bus safety checks, bus evacuation procedures, and so on.

The more subjective area of customer service is a relatively new area of training. It requires an operator to define their concept of customer service, develop or buy in training materials, and demands a different approach to training. Different operators have adopted separate approaches. Smaller operators have needed to buy in relatively off-the-peg training, while larger groups can benefit from the economies of scale and have developed their own in-house training. Some companies have employed specialist staff to develop programmes, while others have brought in consultants and trained up their own staff to deliver programmes.

Nearly all operators report having learned a lot in the last five years of delivering training, and most believe they can go on developing in terms of quality and breadth of training. By reviewing what has already been achieved it is possible to look at the areas where further development might be beneficial.

5.1 Recruitment and driver development

For all companies recruitment starts with basic checks on eligibility - for example on health, possession of a clean car licence, and age. Interestingly it appears that not all undertake checks for relevant criminal records unless they are providing services for children.

After this process has been completed operators employ different ways of filtering candidates including:

- test questions – sometimes by phone pre-interview
- psychometric testing
- interviews
- previous experience, for example in retailing, or customer service.

Recruitment is a complex and specialist field, and the extent to which operators have brought expertise in-house, bought in external expertise, and experimented with newer ideas (for example, psychometric testing) has varied. It was not possible to ascertain if at times operators rejected some methods as ineffective because the method is not applicable to the industry, or because they do not have sufficient expertise at a local level to appreciate and fully utilise the tools.

All of the operators interviewed spoke of a change of emphasis from recruiting for driving skills, to recruiting for ability to provide good customer service alongside an aptitude to learn to drive public service vehicles safely. That said, the cost of driver training to smaller operators may make recruitment of qualified drivers more attractive to them. This may not be disadvantageous to the passengers as long as good quality customer service training is also part of the training package.

As well as provision of training by private companies it is possible for Passenger Transport Executives (PTEs) to offer training to local operators to ensure that all operators have access to high quality training.

South Yorkshire PTE (SYLTE) has established a training academy, which offers training to all sizes of companies. It has received funding through the Local Sustainable Transport Fund (LSTF).

Many operators no longer view induction training and CPC training in isolation. Some have developed mentoring programmes that support new drivers in the first year of employment. Others have gone further and developed an apprenticeship approach with training available. In some cases the scheme is compulsory for up to two years for new drivers. The focus of ongoing qualifications and training includes elements of customer service and safe driving. Some of these schemes are linked to external qualifications such as NVQs and the Royal Society for the Prevention of Accidents (ROSPA) gold-level award. In at least one case the operator starts investing and developing staff even before they join the company.

Nottingham City Transport frequently recruits directly from Jobcentre Plus, a government agency which helps unemployed people find jobs, offering a six-week pre-employment training course to those who demonstrate they meet the company's employment criteria.

At the other end of driver training, operators are keen to engage long-term staff in training. Not simply because ongoing training is compulsory, but also because it enables them to keep staff up to date with changes in-house and in the wider environment.

“Drivers do the same thing every day; how do you keep them fresh?”

Operational manager

While all operators are likely to be aiming to ensure bus drivers are both safe and offer excellence in customer service, the emphasis on how this is achieved varies.

As with induction programmes, ongoing training can vary with some operators expecting compulsory training only while others also offer additional elements such as external qualifications, distance learning, etc. External qualifications offer the advantage of independent validation in an area where measuring the outcome of training and the impact on driver behaviours is challenging. External validation can also offer the advantage of providing drivers with objectively-benchmarked transferable qualifications. It feeds into the professionalisation of the bus driver role not only in terms of safe driving, but also of customer service provision.

Further external validation is provided by national award schemes. The UK Bus Awards include customer service assessment in the judging process. The Bus Driver of the Year award does not focus so clearly on the customer service element, but each operator has to endorse entrants and it is to be hoped that any driver with a poor customer service record would be vetoed.

One of the most challenging aspects of training is measuring the impact on behaviour. This is a topic that will be examined further in the following sections.

5.2 Development of training and training materials

“Some training is still dull and boring. It meets syllabus standards but doesn't change behaviour.”

Bus operator

In developing customer service training some operators seek to benchmark the levels of customer service they wish to attain. Others look at particular aspects of training they wish to emulate. Examples include:

- benchmarking against non-transport companies
- benchmarking against perceived best in industry
- benchmarking specific aspects of recruitment or training against competitors who are perceived as successful.

Some operators did not appear to benchmark, but did have training objectives related to business objectives.

While specific training objectives showed some variance, training content and the materials used varied for a number of reasons including:

- the EU syllabus offers a minimum content and many operators wish to develop the content further
- operators have different training strategies and design to meet operational objectives
- operators respond to the operating environment
- operators develop training in different ways, for example training designed and developed centrally, training designed centrally but developed locally, or training developed locally.

The way programmes have been developed varies. Examples include:

- development and provision of training via PTEs
- development by external consultants with input from transport staff (frequently the programme is then adopted, adapted and delivered by in-house staff)
- development of single training programmes by holding companies for all regions
- development of programmes by regions within a holding company, with a forum for exchanging best practice
- development of programmes by staff who are recruited for specific expertise
- development of established in-house trainers to develop and deliver programmes
- development in-house with the help of external consultants or academics
- using programmes developed and delivered by external agencies.

It is worth noting that some small operators rely completely on external training provision. It appears that a small number of drivers (especially part-time drivers) are expected to source and pay for their own CPC training.

Everyone who was interviewed for this report stated the programmes were continuously being developed and improved. Some of the forces creating the change include:

- trainers who also drive buses bringing back new areas for training based on their experience of changes on the ground
- complaints or serious incidents within the company
- new research – in-house
- new approaches, information or content gained from external sources in the fields of business, psychology or academia
- ideas introduced by delegates on training programmes
- ideas gained from other operators
- feedback from measurement of change of behaviour following training. This can include interviews with delegates, observation, mystery shopping or more complex analysis

- external feedback, for example BPS, local operator-based, or regionally-based surveys

Overall there appears to be two approaches to designing training content and materials. These can best be described as the fixed and the dynamic approaches. Some operating groups research and develop training packages that are essentially fixed in content and delivery, while others allow local trainers to input to packages, for example adding sessions that relate to local issues.

Externally-provided packages tend to develop in relation to the requirements of those purchasing the services. It would seem that ongoing development is inevitable as trainers and operators respond to dissemination of best practice and to new factors such as responding to changes in the law and new areas of knowledge relating to disabled passengers.

In terms of updating and developing training sessions, a variety of approaches were reported including:

- company-wide reviews - internal/external
- adding new themes as they become current. An example of this is dementia training which has recently had a more prominent role in training as the issue has been publicised
- changes introduced due to incidents occurring within the company or high-profile national cases
- some changes may be recommended by passenger panels or other stakeholder groups
- response to feedback at roadshows
- many trainers still also drive buses and may introduce new examples based on their own experience
- changes are sometimes made in order to gain external accreditation
- changes to deliver company strategy, changes in policy or as a result of research into passenger satisfaction.

While ongoing development is to be expected and welcomed, there is an issue of ensuring that training continues to meet passenger expectations. Passengers are looking for outcomes such as:

- safe driving
- a smooth journey
- a courteous driver
- a sense of safety on board the bus
- access to the information they need for their journey.

While agreed guidelines on the basic content of training would offer reassurance and support the industry, this alone cannot deliver improvements to customer service that both passengers and the industry desire. In order to have maximum impact, training needs to succeed in delivering in three core areas:

- provision of information
- engagement of trainees
- allow for the integration of learning.

Adults have a specific learning style. They add new information to that which they already possess and they view new information in the light of their own experiences. Adults have the need to know why they are learning something, and they are problem solvers who learn through doing. Adults learn best when the subject is of immediate use. Therefore information needs to be provided in a way that relates to the trainee's own experiences, and allows them to see and practice the application of training to their role.

There are many excellent examples of training that incorporate the principles of successful adult learning programmes. For example:

- Several programmes introduce customer service by asking trainees about their own experiences of good and bad customer service. This allows the group to discuss what makes good customer service and how they might deliver it in the context of their own job.
- Accessibility modules that encourage candidates to consider relatives and friends who experience difficulties in accessing buses, appear to help trainees view accessibility in a real-life context. Positive results are reported from providing drivers with the opportunity to access a bus using a wheelchair, or making their way through a bus while wearing glasses that approximate the experience of some partially-sighted or blind passengers.

While it is important for some training modules to provide information, it remains necessary to ensure that the trainee understands the relevance of the information to their role. For example, some training modules teach about the cost of fuel and how styles of driving impact on fuel consumptions and costs. Some go on to link this to elements of the passengers' experience such as jolting. However, to complete the training an understanding of practical outcomes of reducing jolting is required. For example the impact of a fall on a bus, especially for an elderly passenger, is important. Some drivers will be motivated to demonstrate driving skills in regard to braking, fuel consumption, but developing passenger empathy by engaging drivers with the human cost of 'heavy-footed driving' is also important from a passenger's perspective.

Furthermore, training needs to facilitate the development of self-awareness and positive self-management in delegates. In any situation the driver faces they are one part of the equation. Each person has their own style, personality and experience. Drivers are not clones and few operators or passengers would want them to be so, but each member of staff does need to understand their own style and how to manage it use it to positive effect in a work setting.

As the industry moves forward and continues to develop training for bus drivers, there is an opportunity to continue to refine and define the course content. While courses may provide information and an opportunity to discuss the information, this alone does not necessarily ensure that information will be understood, and result in changed behaviour. Training providers need to ensure that the key information is provided in a way that allows drivers to develop what might be usefully described as passenger empathy.

In relation to the content of training there could be benefits to developing industry wide guidelines on best practice. While it is understandable that operators will want to retain a degree of flexibility to meet the requirements of the operating environment, key elements of training are already emerging across the industry. The themes that have been observed are detailed below.

Communication

- Listening skills linked to empathetic responses, open questions, information provision and problem solving
- Good communication skills and understanding your own communication style
- Problem solving – managing conflicting demands
- Managing challenging situations
- Understanding body language and using appropriate body language
- Putting the customer first and understanding their perspective – labelling/prejudice
- Self-management – self-esteem, stress

Accessibility

- Society's views of disability historically and currently (including medical vs social models). Discussion of prejudice and social exclusion
- Communication, learning the difference between hearing and comprehending
- Communication skills – recognising factors that might inhibit communication and learning what to do when facing these situations – practice as well as information provision. Are they drunk, or do they have a brain injury, learning disability? Are they autistic?
- Basic information about a variety of disabilities with specific training on hidden disabilities
- Passengers who do not class themselves as disabled, but who do have issues that make it more difficult for them to use buses
- Technical training – for example on using ramps
- Wheelchairs/buggies/shopping trolleys/walking aids – company policy and confidence in delivering company policy
- The use of 'walk in my shoes'. For instance giving drivers the opportunity to board a bus using a wheelchair and the use of simulation spectacles when on-board
- The use and provision of communication cards or mobility scooter passes
- Discussion of real-life scenarios that have happened in the company or appeared in the press
- Understanding relevant legislation
- Role play – taking the other person's perspective (aptly called 'real play' by one trainer)

There is a difference of emphasis between operators on the way disability is written into the training programme. Some operators weave their training on delivering for disabled passengers right through their customer service training; others have specific training sessions. One consideration in relation to the non-specific session approach could be the dilution of training, so that important elements are in danger of

being lost. However, specific training sessions on disability could lead to a tick box mentality to disability training. There is merit in using both approaches simultaneously.

It is recognised that it can be difficult to offer a pan-disability overview, and yet also cover the specifics of each disability. Working with stakeholders is an approach taken by many operators and this is to be welcomed, but it also has its challenges. In small areas training can become dominated by the perspective of one group. For operators covering larger areas and multiple depots, the task of coordinating stakeholders with training days can present issues around consistency.

It may be possible for the industry to consider developing national resources. The Confederation of Passenger Transport, in conjunction with the Mental Health Action Group (Derby), has already developed a training video about mental health issues that is available nationally to operators.

Transport Focus is aware of a number of national organisations that would be willing to provide resources via their own web sites to support driver training. For example a simple one-page explanation of the key issues of a specific disability, and how these might relate to the role of front-line staff, would be appreciated by some drivers. Many specialist organisations would be very willing to provide this type of advice. It is cost-effective and can easily be updated.

The Government is taking a lead in bus and coach driver disability training. We look forward to research which will help define the shared foundation for driver training. Readers may also be interested to read '*Summary of responses to the Department for Transport of the mandatory disability awareness training exception applied under EU regulation 181/2011*'.

While training continues to be delivered and developed, the question that remains to be fully answered is whether it is effective in creating behavioural change. Our understanding of adult learning, which is based on research, indicates that customer service training that provides information and encourages trainees to talk in training sessions is unlikely alone to be sufficient to change behaviour. Trainees must be able to relate to the information and believe it is relevant in their work and develop appropriate 'passenger empathy'. Many training programmes are already pursuing this aim and are seeking to assess success in these terms.

However, measuring changes in attitude and behaviour is challenging. The following methods are already in use:

- mystery shopping – staff, external and regular passenger
- Bus Passenger Survey
- passenger research in-house
- complaints/applause
- observation by mentors or other staff including senior managers undertaking journeys for the purpose of observing customer service.

Measuring attitudinal change is achieved by the following:

- six-month review with drivers/mentors
- quizzes at the end of training sessions
- log books/homework
- apprenticeships – ongoing training qualifications
- buddying/mentoring post training

Assessing the effectiveness of training or session content is difficult. In describing training success some operators look at active participation, others try to measure change of attitude and some may try to assess change in behaviour in the work place. Some already seek to measure all three.

In our discussions it was notable that operators focused on identifying individual change, but did not refer widely to how they would measure the impact. For example, could the number of disciplinary interviews conducted each month offer a measure of training success? If the training is successful it is logical to assume the number of disciplinary hearings should decrease.

In view of the cost of ongoing training, it seems likely that over time that the majority of the industry will want to further develop ways to systematically measure the impact of course content on service delivery. This provides an interesting and potentially valuable avenue for further development.

5.3 Development of trainers

Smaller companies tend to buy-in training, and so the process of selecting and training trainers is an activity largely confined to medium and large companies. Some trainers have been in post for a long time, while others have been recruited more recently to meet the demands of compulsory training. The criteria for recruiting and training differs across the industry. The similarities noted in all of the trainers we interviewed or met during the production of this report was enthusiasm and commitment. However, selection and training for the role of trainer varies.

Operators advised they selected potential trainers on the basis of:

- being an experienced driver with a good record of customer service
- someone others will respect and have confidence in
- sometimes trainers are selected on the basis of previous training experience within the industry or externally
- aptitude.

A normal recruitment procedure including an interview is usually followed.

Training the trainers varies using formal and informal methods:

- learning by watching
- external training courses
- online study – distance learning
- external recognised courses

- in-house training
- practicing while working with an experienced trainer/coach, delivering sessions totally or in bite size chunks.

Companies vary in requirements for formal training, and also the level of ongoing study or training required once in post. Potential trainer qualifications include but are not limited to:

- PTLLS - Preparing to Teach in the Lifelong Learning Sector⁸
- City and Guilds - Teaching in the Lifelong Learning Sector (DTLLS) (7305)⁹.

One area that does not seem to be consistently taught to trainers is around the principles of adult learning, and individual styles of learning. A few trainers who we interviewed came into the industry already having obtained qualifications which included this knowledge. Some trainers advised they had received some information about this area, while others could not recall having any training relevant to the topic. That said it was clear from some of the course material that some of the exercises reflected theories on the way adults learn and provided potentially rich learning opportunities.

In some organisations those charged with developing the programmes had the relevant knowledge, while others sought expert opinion. However, in some cases trainers were allowed to adapt and develop courses without having this specific knowledge. While it is possible to deliver material in a consistent way, delivering the material in a skilful manner that is most consistently likely to promote behavioural change is a challenge that is recognised by some. Although this might point to the possibility of good training material being presented ineffectively, this might be mitigated by the way some operators select customer service trainers.

Where customer service trainers are selected for a style and approach that naturally delivers training in an adult-friendly way, it may be that course material can be developed and delivered effectively without theoretical knowledge, but this is by no means certain. Some trainers related questions we posed about learning styles to managing the group and making sure everyone takes part. While this contributes to the learning environment and ensures that knowledge is imparted, it does not necessarily ensure that training creates internal change in delegates. This area would benefit from further exploration, but it is possible that making the provision of a short overview of learning styles part of a core curriculum could be a positive way of helping develop trainers. For example where they do not do so already operators might want to include a session on the following, or similar:

- Honey and Mumford's work on learning styles (Activist, Reflector, Theorist, Pragmatist)¹⁰
- Knowles' work on adult learning (andragogy)¹¹

⁸ <http://ptllsresource.co.uk/what-is-ptlls>

⁹ <http://www.cityandguilds.com/qualifications-and-apprenticeships/learning/teaching/7305-teaching-in-the-lifelong-learning-sector-dtlls#tab=information>

¹⁰ <http://www2.le.ac.uk/departments/gradschool/training/eresources/teaching/theories/honey-mumford>

¹¹ <http://teachinglearningresources.pbworks.com/w/page/30310516/Andragogy--Adult%20Learning%20Theory>

Adults are problem-solvers and need to know why they are learning something. They learn through doing and learn best when the subject is of immediate use.

5.4 The development of a customer service focused organisation

“We have trouble ensuring new drivers stick to what they have been taught... We don't want them to drop to the standards of some drivers who historically received a different sort of induction training.”

Training developer

Creating change is not just about training drivers and the provision of information. It is also about creating and reinforcing cultural change within an operation. Some methods currently being used to reinforce training messages and develop rapport across the operations (bridging the gap) include:

- canteen sessions/team talks
- open door to management for discussion of issues arising
- staff competitions with a small prize for suggesting the best ideas for delivering improvements for customers
- drivers can shadow a manager for half a day
- senior and middle managers attending the start of day shift at each depot at least once a month.
- riding the local-area buses for half a day.
- managers being required to drive a bus every quarter or annually
- briefings
- newsletters
- notes with pay slips
- noticeboards
- 'Driver of the Month/Year' competitions – nominations by staff or public
- open forums
- randomly selected drivers, which change each time, being brought together to raise any issues relating to customer service or operations
- sharing complaints/praise and reinforcing good practice
- staff web sites
- six-month chats to ask if there are issues /formal appraisals/annual refresher chats (not appraisals)
- mentoring and coaching
- key performance indicators (KPIs) – supporting trainees for set periods up to and exceeding the 12-month point
- disciplinary meetings can be a place to educate, repeat and reinforce information.
- role models, mentors and buddies.

The operators we spoke to stated they recognised the importance of the whole organisation supporting the driver in their role. Some organisations, but not all, have developed an inter-team customer service ethos, allowing managers to model appropriate behaviour and responses.

At the very least, drivers need support in delivering customer service. Some organisations have taken action to create this supportive environment. It is notable that these measures are less about the management of drivers and more about running an efficient bus service. Yet these measures impact on the driver's ability to deliver good customer service. Examples include:

- providing back up in the form of an inspector who can join a bus where a driver is experiencing 'crowd-control' issues.
- increasing the quantity of control centre staff to ensure drivers can access prompt guidance when timetables become impossible to deliver.
- clear policies around conflict hot spots, for example issues relating to space for luggage, wheelchairs and buggies.
- removing the requirement of young people to provide age ID to obtain a child fare, which against predictions lead to no loss of profit for the operator. This had previously been a major source of conflict for drivers.
- mentoring.
- ensuring there are processes in place to ensure boarding and fare collection can be undertaken efficiently. This avoids conflict situations with passengers and delays causing late running buses.
- improving information provision for passengers so that drivers are not left to cope with queries about late running buses due to issues such as road works, traffic conditions, and changes in timetables.
- reviewing and improving the viability of timetables. For example by making changes to running times and increasing resources. Fewer late-running buses leads to less friction.
- reviewing recruitment policy and procedures to ensure that bus driver shortages are avoided.
- creating links to local communities to ensure the services are viewed as 'our services' rather than 'those/their services'. This measure frequently has marketing benefits, but more importantly in relation to bus drivers, they become an adopted and valued part of the community. We were told that when things go wrong the driver is less isolated, and viewed less as the cause of the problem.

Many of those interviewed spoke of the importance of encouraging and supporting drivers. Even where errors are made it is often seen as an opportunity to develop the driver. Overall little mention was made of equipping supervisory and managerial staff with skills to deliver this approach, through for example coaching skills. The next logical step for the industry to consider, if they are not already doing so, is training for supervisory staff.

6. Conclusions

During the first five years of the introduction of compulsory training the operators interviewed for this project have undertaken a lot of developmental work in terms of cultural changes, and the specifics of training. They have identified the progress made, but also view the second phase of training as an opportunity for ongoing development. Most consider this work as important for delivering customer service and building commercial advantage, but there is also an opportunity. The work undertaken represents a massive effort on the part of the operators. It has created for many a good start and a positive foundation for further development, but this is not the whole story.

Transport Focus has thousands of verbatim comments from passengers. Many of them are about bus drivers. Some of the complaints focus on the driver's attitude, but many attribute blame to the driver for issues beyond their control. For example: "This driver is always late". The way services are organised and managed has a huge impact on the drivers' ability to deliver customer service. Customer service does not begin and end with the driver, it is a whole business responsibility. Many operators are grasping this nettle, but the focus on training drivers sometimes overshadows the wider efforts.

Customer service is not just about training drivers, it is about whole systems management as well. Many operators are grappling with these issues and many have inventive ways of managing the challenges. The following pointers suggest some areas that are core to improving customer service in the bus industry.

Bus drivers

- Recruitment – companies are recruiting for customer service and training driving. They are also benchmarking against the best in the transport and retail industry. Both initiatives are positive, but there has to be an honest realism about the differences in operating environments. In busy conurbations the driver has little time, and the burden of delivering customer service cannot be theirs alone. There is benefit for operators in being able to articulate from driver to MD the business's whole customer service story.
- Status – how do you treat your drivers and how do they feel about their jobs? No amount of customer service training will be 'taken' on by a demoralised driver.
- Peripatetic workers – to state the obvious bus drivers are peripatetic workers. How are they supported, and does the business actively tackle this issue? If the business does not support drivers, they will get their support elsewhere – usually the canteen and potentially not the support you want them to get.
- Training – there is a simple question to answer. Are training courses giving information and engaging, or are they changing attitudes? Some of the courses do add elements that can produce attitude change and insight, but are all of them doing this?
- Trainers – are trainers equipped to deliver knowledge, or create change? Is the quality of training for trainers adequate?

- Outcomes – are difficult to measure. Some operators are trying to measure outcomes but it remains an area for development.

Systems

- Systems need to work for drivers. For example timetables that are impossible to deliver mean that the driver becomes a punchbag which absorbs all of the criticism aimed at the company.
- Drivers are isolated from management teams. Some operators are working to bridge the gap recognising it as a key to developing the business.
- Modelling behaviours throughout the business is potentially a key factor in delivering good customer service. Drivers may be trained in customer service, but if the business fails to respond to written complaints little may be achieved. Similarly if supervisors do not model the behaviour they are expecting the drivers to deliver, then drivers are likely to become disillusioned or plain weary. Training supervisors and improving their managerial skills is likely to enhance the operators ability to deliver good customer service.
- Us and them – the response of the community to the operator will be reflected in the everyday experiences of the driver. Many operators actively seek to build bridges with the community in way such as through branding. However, there are other more informal links that help to establish operators at the heart of the community. For example sharing community activities and acknowledging significant local events.
- Changing customer service is about changing lots of little things. Bus driver training will help but only as part of a whole package.

Based on the interviews carried out it is evident that operators value their independence and wish to maintain flexibility in training content. Sharing best practice may sometimes be seen as giving away competitive edge. However, there are areas where a shared approach or common understanding could be developed. There is much good work being undertaken and there is also an opportunity to share this good news with passengers.

In addition to the above there will be opportunities to develop accessibility training based on new research that will be published by the Department for Transport later this year. Transport Focus is also working with Age UK and other stakeholders to develop quick reference resources for transport operators to use to support training packages.

While the key areas outlined above will help operators identify improvements to training there is no silver bullet. There is no 'How to do it manual'. No operator has all the answers. The best training will be delivered by those who have a sound process for continuous improvement. The better the feedback loop providing management with the outcome of interventions, the greater the ability to improve training. This is a classic management task. Beyond this is the matter of values.

Customer service and delivering the best service is, in the end, driven by the values of a company and the values demonstrated by management. No amount of training or rule books can cover every situation. Proper support systems can reduce the

amount of discretion a bus driver must use, but in the end the driver will always face the unpredictable and the unusual. It is at these times that values will drive the decision-making process, and ultimately the action taken. The driver can be selected on the basis of values, and the criteria they bring to decision making, but as it is often said, "values are caught, not taught."

In the last decades the role of the bus driver has fundamentally changed. In the last five years training has changed. Change has not stopped. Driverless buses are already being piloted, and during this century we will see massive changes to transport. Training that focuses on customer service is laying the foundation not only for the next five years, but far beyond that. It is developing a flexible workforce and management system that is able to meet future demands, while delivering excellence in the here and now. Operators are already engaged in this process and are aware that delivering excellence is an ongoing process.

Training has come a long way and the next five years offers further opportunity for even greater change and development. This report is designed to ask questions, and to prompt debate on this vitally important issue.

7. Appendices

Appendix 1

Trigger questions for interviews

The following questions are used as a prompt, and are supplemented as required.

1. Recruitment & training

- What are the criteria used for recruitment?
- What is in the training (other than for driving) and how long does the training take?
- Do you have your own training?
- Are senior managers involved?
- What is the content in relation to customer service and accessibility? In relation to accessibility which disabilities are in the training pack? Do you work with stakeholders?
- Do you train for attitude, smiling, eye contact, etc?
- Do you look at the barriers to good customer service? For example time constraints.
- How do you monitor the impact of training? For example mystery shoppers and attitudinal change.
- How do you reinforce training? For example team talks each day and 'champions'. Is it written? How do you know they read it?
- Retention?
- Have you got a strategic approach to defining the driver role? For example the customer service vs driving split?

2. The role of the driver

How do you define the role of the driver?

- Information provision?
 - Fares and timetables - what do you expect for the driver and what do you provide in the wider environment?
 - Audio visual – if there is none do you expect drivers to provide information about bus stops? Information in disruption?
- Conflict resolution – trouble with young people? Violence? Buggies vs wheelchairs, etc.
- How do you expect the driver to behave – dress, greeting, etc,

Do you know how drivers view their role?

3. Measuring success

- Use of complaints:
 - How easy is it to complain and which mediums are used?
 - How many do you get?
 - What is your turn around time?
- Do you have employee of the month? How many passengers nominate, etc?

4. General Questions

- Payment options on buses

Appendix 2

Main participants (in alphabetical order)

- Arriva
- Bus Driver of the Year Awards
- Confederation of Passenger Transport (CPT)
- First
- Go-Ahead North (Including Gateshead Depot)
- Go-Ahead South Coast (Including Crawley Bus Depot)
- National Express (including Nottingham Depot)
- Nottingham City Transport (including Nottingham Training facility)
- Reading Buses (including Reading Depot)
- Stagecoach (Including Stockport training facility)
- South York PTE
- TAS
- UK Bus Awards

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