

Return to rail: what do passengers want?

Research report – 2nd qualitative phase of the interim rail passenger survey

July 2021



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Fieldwork for this project was carried out in March 2021

Introduction



Background, approach and sample overview

More detail provided in the appendix

Background & objectives

- In place of the regular NRPS, Transport Focus have been conducting a range of research to understand passengers' experiences of travel during the Covid-19 pandemic, and priorities as travel and daily life opens up
- In addition to the 2021 Interim Rail Passenger Survey (IRPS), Transport Focus commissioned this qualitative research to complement and qualify the findings

Approach & dates

- We asked respondents to complete 2 days of activities on our online platform Recollective to draw out their views and experiences
- Following this, on the third day, respondents joined a focus group to elaborate on their initial views and discuss each other's viewpoints
- We also conducted depth interviews amongst disabled respondents and captured some live journey experiences from people making legitimate train journeys during the fieldwork period
- Fieldwork took place from 12 March to 6 April 2021, with the majority carried out during March

Sample overview

- 12 groups of 4/5 respondents spread across England, Scotland and Wales. Groups were also divided by their user type, journey purpose, journey length and level of concern about Covid-19. Total 54 respondents
- 7 disabled interviews with the same splits as above
- 7 live journey interviews with the same splits as above

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- Some live journey stories have been summarised in this report as mini case studies/examples of real travel experiences.

Headline take outs

Headline take outs

There is an unprecedented opportunity for the rail sector over the next few months. Both to build relationships with new passengers and to rebuild relationships with those few passengers who have become disenfranchised with the network due to poor experiences over the years.

Essential to engage or reengage with these customers is mitigating crowding, keeping trains clean and clearer communications about investment into the network such as station improvements and train stock development. This is of course in addition to the fundamental requirement, to provide a reliable, timely service.

Reassurance that the sector will take steps to maintain an improved rail experience compared to pre-pandemic is the key to maximising this opportunity over the long term.

Covid safety was the most important point of reassurance required by passengers and this must be treated with more conviction. Clear messaging and steps to encourage (and even enforce) passengers' compliance with Covid safety requirements are vital to providing this reassurance.

Some passengers stated they would continue to feel uncomfortable on public transport, even after restrictions are relaxed in other areas of society. This is inevitable but does not mean these passengers will not be travelling which further emphasises the importance of visible Covid safety actions by TOCs, and clear Covid safety messaging.

A consistent message was seen as critical to passengers. Many highlighted the differences in messaging from TOCs and the confusion this causes. Therefore, up to date and consistent messaging coming from the rail sector, including railway-wide organisations such as RDG and Trainline*, is extremely important.

Fieldwork for this project was carried out in March 2021

Key findings

Future rail usage

There was an overarching enthusiasm surrounding a return to train travel and the opportunities/destinations this opens up again for the public. While there was still some uncertainty, there was palpable excitement for the summer in particular and the anticipated end of the pandemic.

The vast majority of passengers expected their train usage to increase from what it was in March 2021, with several expecting to return to pre pandemic usage but overall, more people expected to be travelling less.

Commuters felt unlikely to return to numbers seen pre-pandemic but this may have been partly offset by higher numbers of leisure trips.

As a result of this, it could be that more domestic long distance trips occur as international holidays will be limited this year with the British population having turned towards staycation alternatives.

It is critical to maximise the opportunity provided by this enthusiasm and to improve the image of the rail network as a whole.

There are two audiences that the industry can tap into in this respect:

1. Attracting new passengers and building relationships with them
2. Re-engaging those that have become disenfranchised

Main ways of attracting new users:

- Exemplifying the excellent experience
- Highlighting the benefits of travelling by train over other methods (greater levels of comfort while travelling, more environmentally friendly)
- Suitable short term financial initiatives

Main ways of re-engaging disenfranchised users:

- Displaying an improved offering through cleaner trains with better crowd mitigation measures
- Appealing to what they are missing from the trains such as links with destinations
- Suitable short term financial initiatives
- Long term options for improving value for money

Fieldwork for this project was carried out in March 2021

Experience of travelling by train during Covid

One of the most powerful tools that the TOCs can use to appeal to both past users and past non-users is the excellent experience felt by the majority of passengers who have travelled during the pandemic.

This is likely to be particularly effective for lapsed users who were simply unaware of how pleasant it has been on the trains recently. If this group were to be exposed to the measures and positive feedback received then this has great potential to entice them to return faster or at all.

It is this unique situation which creates the opportunity for a step change.

It is important to frame this pleasant experience with a focus on how it will be maintained longer term through crowd mitigation measures and new developments etc. since this will appeal more to those considering using trains again.



Fieldwork for this project was carried out in March 2021

Need for a step change – challenging what we did before

In this report we highlight 4 key areas to be worked on now in order to affect this step change underpinned by 1 longer term area

Cleanliness

- The cleanliness efforts were well received and must be maintained. Particularly important for lapsed and vulnerable users who have no experience of the trains during the pandemic.
- More visible cleaning would be welcomed by all passengers.
- Passengers also want a contactless experience (ticketing, doors etc.) as well as more hand sanitiser stations available on platforms and on trains.

Crowd mitigation

- Overcrowding emerged as the biggest concern for users looking ahead to the future. Some popular solutions were more trains, longer trains, pre-travel capacity checker capability, platform and train management controls.
- Effective communication about what is being done is vital. Overcrowding will be virtually impossible to stop in some instances and TOCs need to demonstrate that they are doing what they can to build trust.

Information provision

- Passengers must have all the information they need and the ability to amend plans if necessary.
- The most popular ideas being improved apps, capacity checkers with very up-to-date information and more staff advising passengers at stations.
- There needs to be clear and consistent information provided by railway-wide organisations such as Trainline.com and via TOC channels.

Managing social distancing and face coverings

- Most passengers want to see face coverings and social distancing continued. This needs to be clearly and consistently communicated
- Passengers' feedback also highlighted the importance of staff:
 - Staff presence reassures passengers.
 - Staff must set a good example for social distancing and wearing face coverings.
 - Staff having greater powers to enforce the regulations.
- Plus, clear rules and campaigns are needed for those who are exempt from face coverings.

Sector investment

- Visible investment was seen as a must by passengers, especially commuters, moving forwards. Passengers want to see continued progress and improvement, especially via newer train stock which is cleaner and greener, station improvements and more staff.
- Improving value for money is important to passengers. Absolute costs were seen as too high and so offers such as carnets or flexi tickets could help entice them back to trains. Short term financial incentives are also likely to be popular to stimulate demand but must be implemented carefully so as not to create a rush of demand back onto the network. For context, findings from the 2021 IRPS, tell us that financial enticements, whilst important, have less influence than other measures such as diligent Covid safety measures and punctuality.

Fieldwork for this project was carried out in March 2021

Communication – what passengers need and want to hear

Passengers will really benefit from hearing more from the rail industry, to remind and reassure them that travel is possible and that train is a viable option – so far they have seen and heard very little

What do passengers *need* to hear

- Reassurance is the buzzword. For lapsed users, this was absolutely critical. For commuters it was less important as they can see the measures in place themselves but it still builds trust. The two biggest items for reassurance are cleanliness and crowd mitigation:
 - The public needs to be made explicitly aware of the improved cleanliness standards. They also need the guarantee that the cleanliness levels will not drop in the long term.
 - Crowd mitigation was the biggest concern for many respondents as trains become busy again. TOCs must make it clear to passengers through their communications and via their social media channels that they are doing what they can to counter overcrowding.
- Other vital items are up-to-date information and helping passengers understand what is open and available on the train network.

What do passengers *want* to hear

- Passengers want more of a connection to the emotional side of travelling. Not just with the rail network itself but also the destinations it offers to them. Tapping into this emotional connection – which may only be temporarily accessible due to the novelty of travelling wearing off again – is critical to maximising this opportunity.
- General sector improvements are always welcomed by passengers. Wherever and whenever investment and new initiatives around train stock, green development, financial incentives and station improvements are planned, this should be communicated directly to passengers to maintain the positive image.
- Understanding what train travel looks like now will encourage more usage, particularly amongst lapsed users who have not experienced it themselves yet.
- Passengers want to hear more about what the TOCs and governing bodies are doing to reassure them, rather than instructions about what they need to do and how they need to behave.

Note: More detailed analysis of communications approaches can be found later in the report

Fieldwork for this project was carried out in March 2021



Expected future – what can the rail sector expect post lockdown?

Future rail usage – what can be expected?

It seems few will shift to other modes and while some commuters will travel less, leisure journeys will compensate for that to some extent and there is an opportunity to attract new users

“I believe my train travel will increase to pre-pandemic levels due to wanting to make the most of being out of lockdown and it will give me the motivation to do more things in London that I wouldn't have done pre-pandemic. Pre-pandemic I wouldn't usually go into London as much, but I feel that I will be using trains much more after restrictions are eased, due to making up for lost time.”

Recent user – Leisure perspective

“I will prefer not to commute to work unless I have to, and maybe spend more time working from home as much as I can, maybe 2 days in the office and 3 days working from home.”

Recent user – Commuter perspective



Fieldwork for this project was carried out in March 2021

Desired future 'the preferred normal' – key requirements and opportunities



“Please, please, please give us clean trains.”

Recent user, leisure

“Make a commitment to not let things get back to where they were pre-Covid re crowding on trains.”

Lapsed user, commuting



Context – what is it like to travel during the pandemic?

Like other areas of our lives train travel during Covid-19 has disrupted the norm and set a new precedent for many passengers

Train experience during Covid-19

Any concern about virus infection aside, train travel during the pandemic has been a considerably more positive experience for many passengers compared to pre-pandemic.

Key takeaway:

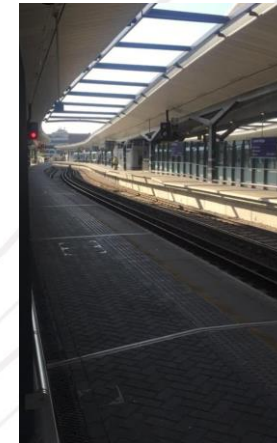
Passengers want to maintain the positive experience that has emerged during the pandemic and are concerned about returning to the crowding, service issues etc. they encountered pre-pandemic.

“There was no need to queue up in order to leave the train before the doors close and the train departs due to the minority of people traveling - indeed a pleasurable and stress-free travel experience.”

Live journey, London

“I felt comfortable travelling with reduced overcrowding at stations and trains with reduced number of people now traveling during this period. Trains arrive without significant delays and all delays where there are any, are all communicated via the live screen train updates.”

Live journey, London



Live journey, London
Bridge station example

The key reasons for this are:

1. Stations and trains are less crowded (e.g. fewer and shorter queues, getting a seat, etc.)
2. Services are less disrupted and more punctual (to some extent driven by point 1)
3. Trains are notably cleaner (and passengers actually see cleaning staff)
4. Staff are easier to get hold of for any information queries at stations and on trains (if they are available)
5. Improved technology and information provision (e.g. paperless tickets and train load checker)

Whilst this seems to be the general sentiment, there have been incidences where the experience has been dented by some issues, although the positive aspects outweigh these negative aspects:

1. No staff available at smaller stations (and later in the evening) – see also staff section later on
2. Old and tired train stock (which does not give the impression of cleanliness) – see also sector investment later on
3. Reduced services at certain peak times

Fieldwork for this project was carried out in March 2021

Live journey – Overall experience



The story

One of our live journey respondents was a daily commuter on Scotrail. The journey he recorded for us was his morning commute on Tuesday 30th March. Having carried out this journey both before and throughout the pandemic, this respondent was very Covid confident in general and was able to make direct comparisons about the experience.

Overall, he thoroughly enjoyed the experience of travelling on the train during the pandemic, particularly during the harsher lockdowns, due mainly to the lack of overcrowding. Exemplifying this experience is key as several lapsed users may not be aware of the safe, pleasant experience felt by users.

The passenger perspective

Our respondent also had some ideas on how to maintain this experience as restrictions ease. His ideas were based on what he felt should have been done after the first lockdown when the trains became very busy again very quickly which he feels needs to be managed better. He felt that “adding more carriages or services, or just more direct services from major stations where the operators can see these are the busier stations” would help to prolong the good experience even after more passengers return. Whilst difficult to implement, passengers expect these measures so TOCs must manage these expectations with tangible mitigation measures.



Live journey, empty train example

Fieldwork for this project was carried out in March 2021

How to get there



Areas the rail sector needs to focus on to create a ‘preferred normal’

The ‘preferred normal’: a scenario in which the industry has taken onboard the positive experiences of the pandemic and applied them to their plans for the future

Operational key focus areas and timings

The hiatus in train travel presents an opportunity to improve the service and thus the image of the rail sector. This can happen by attracting first time users and re-engaging with those that have become disenfranchised over time.

The following areas present such an opportunity in the short term:

- Cleanliness
- Crowd mitigation
- Information provision
- Managing social distancing and face coverings

Whereas the below should be the aim in the longer term:

- Sector investment (technology, rail stock, financial incentive, green credentials)

“I am concerned about the overcrowding when people come back.”

Disabled user, lapsed, commuting

“Cleanliness is the key and that is what needs to be improved [from pre-pandemic] to make me feel more comfortable.”

Recent user, commuting


“If they [train companies] aren’t going to enforce it [complying to Covid regulations], it’s not going to happen. ‘We’re doing our best’ is a bit short sighted, they’re going to have to commit to it a bit more, whether it’s employing people to enforce it like bouncers who have been out of work for the last year.”

Lapsed user, business



Fieldwork for this project was carried out in March 2021

Creating a more positive perception – Cleanliness

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What works – Cleanliness

Passengers have noticed the effort train operators have been putting into keeping trains and stations clean to protect them from Covid-19

A step in the right direction

Here the rail sector has taken a step in the right direction – passengers acknowledge cleaner trains and hand sanitisers being available at stations and on trains. Cleaning staff have been seen on trains which provides reassurance.

Positive is also the seemingly greater availability of electronic tickets on smart phones, thus avoiding having to touch ticket machines at stations to print a paper ticket.

The rail sector is not seen as lagging behind any other sectors with regard to cleanliness – passengers appreciate the effort by train companies to keep stations and trains clean.

“The station entrance was very clean. I am quite confident that the cleanliness is of a good standard.”

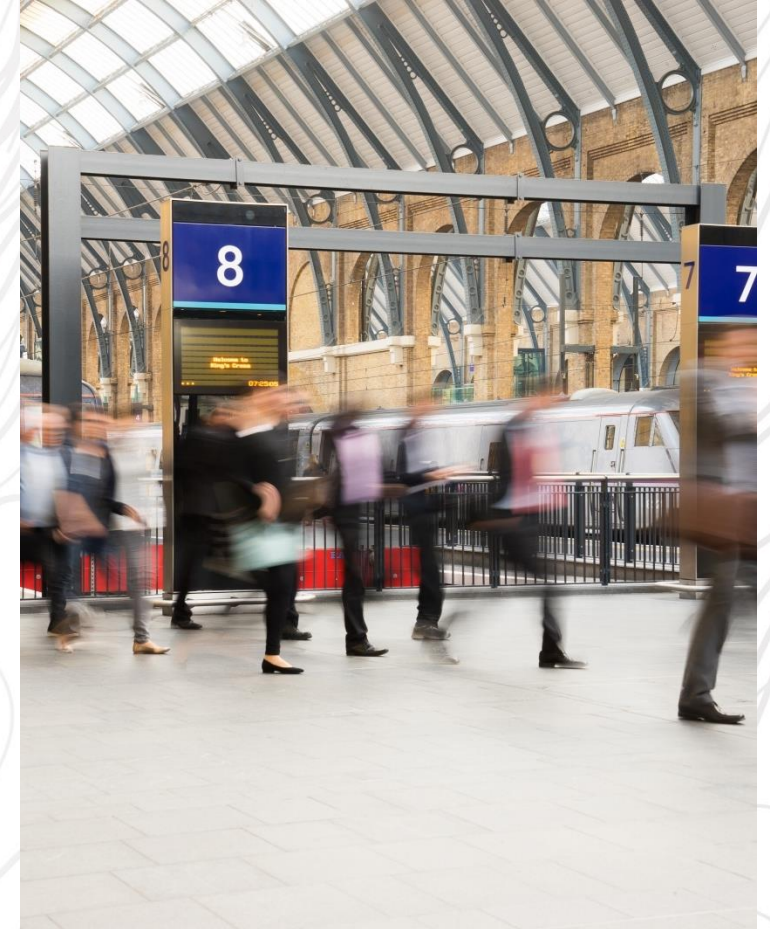
Live journey, Scotland

“The atmosphere on the train was also pleasurable as the trains were empty and no one shouting or talking aloud and/or playing music. Carriages were much cleaner [than pre-pandemic] and I noticed the flooring polished at times during the journey.”

Live journey, London

“I feel like they [train operators]’ve handled it [the pandemic] really well especially TfL and Southeastern making hand sanitizer stations accessible and as I mentioned sanitising the seats continuously on the trains.”

Recent user, commuting



Fieldwork for this project was carried out in March 2021

Looking ahead – Cleanliness

The key is to continue with the cleaning programme that has been introduced and has given the sector a more positive image

Maintain and improve amended system

Passengers want the enhanced cleaning regimes maintained or even improved where possible. They don't want to go back to dirty (and tired) trains they experienced pre-pandemic. They also want to avoid contracting the 'standard' cold and flu through travelling by rail in crowded and overcrowded trains.

Furthermore, passengers want to avoid having to touch things in order to travel, like door opening buttons and especially ticket machines. There is an expectation of paperless tickets becoming the norm, however, the system needs to work across the whole network (e.g. when changing TOCs).

For this to work, passengers want to see hand sanitiser becoming increasingly available at all stations and on all trains.

If ticket machines will still be used hand sanitiser stations need to be next to the machines. They also need evidence of cleaning like seeing cleaning staff in action e.g. at stations and on trains (like long distance) as some do already or toilet rotas (like on public toilets). Perhaps more achievable would be to produce more communications to this effect.

Long distance passengers mention the need to clean seats when a passenger leaves the train and a new passenger is meant to take the seat. No solution could be thought of for such a scenario but TOCs need to acknowledge they are aware of this.

The continuous requirement for clean(er) trains is voiced equally amongst Covid cautious and Covid confident passengers.

Key takeaway:

Passengers would want to see the cleaning processes introduced during the pandemic continued or further improved if possible. This includes contactless processes i.e. when buying a ticket. This is an evolution from January 2021 when it was all about having clean stations and trains. Now it's also about keeping them.

"Visually see people cleaning. I haven't seen any adverts that are really going out of their way for trains to be kept clean."

Recent user, leisure

"Highlight all the changes have been made about cleanliness."

"Cleanliness is a key factor of getting me back onto the trains."

Lapsed user, commuting

Disabled user, lapsed, commuting



Fieldwork for this project was carried out in March 2021

Live journey – Cleanliness



The story

This respondent was travelling on GWR and SWR to visit her support bubble on Saturday 27th March. She has been travelling regularly throughout the pandemic and is Covid confident in general. She has “no concerns about actual safety and [is] double vaccinated but does have concerns about being stopped by police even though ... [she has a] legit reason to travel”

Her overall experience was positive with both operators but feels that cleanliness is something that still can be improved. Dirty train windows was an area she highlighted along with the lack of hand sanitisers on trains. One photo being accompanied with the caption: “Photo of the free hand sanitiser at Waterloo, but which I’d like to see available on the train.”

Cleanliness is particularly important to her as she states that it is also psychologically reassuring having hand sanitiser stations (on trains and at stations) as she sees other passengers using them and so it makes her feel safer.



Live journey, sanitiser station example

Fieldwork for this project was carried out in March 2021

“There need to be more sanitiser units on trains. It would be cleaner, especially in toilets if they had sanitisers in vestibules, it would make me feel safer. Have people walking around, sanitising trains, cleaning handles, tables. I would like to see that physically done for long term trips.”

Recent user, leisure (long distance)



A photograph of a woman and a young child sitting on a train. The woman, with long curly hair, is wearing a white face mask and looking down at a purple smartphone. The child, with short brown hair, is also wearing a face mask with a colorful pattern and is looking out the window. The train interior has dark seats and large windows. The text "Creating a more positive perception – Crowd mitigation" is overlaid in white on the left side of the image.

Creating a more positive perception – Crowd mitigation

What works – Crowd mitigation

Low levels of passenger volume have a considerable impact on the train experience, something passengers relish

More pleasant journeys

Travelling on emptier (or even empty) trains during the pandemic has given many passengers a flavour of how much more positive the train travel experience can be.

No or shorter queues at stations and less crowded or empty trains do not only ensure that passengers can social distance but it also makes travelling by train considerably more pleasant. Passengers can get a seat, most of the time with an empty seat next to them for social distancing and there is no pushing to get onto the platform or onto the train, which is particularly important for disabled passengers.

Passengers also feel that there is improved information on how busy trains are. This research indicates that they mainly source this information via Trainline and less so through TOC's own capacity and train load checkers.



"I enjoyed it [travelling by train] because it was empty. I got a seat where I wanted. This is the good thing about Covid – there is space on trains."

Disabled user, recent, leisure

"Ultimately, it does indeed feel much of a difference traveling now compared to pre-pandemic times, no overcrowding at stations, stations are much cleaner, no-ones rushing and particularly the absence of this during the typical London rush-hours."

Live journey, London

"It felt as much of a difference travelling now opposed to pre-pandemic times due to the minority of people travelling along. Previous experiences of travelling pre-pandemic brings about mixed feelings as carriages were full with people leaning on each other and carriages packed with people jumping to just get in - it essentially felt much more laid back and stress-free indeed."

Live journey, London

Fieldwork for this project was carried out in March 2021

Looking ahead – Crowd mitigation

Passengers just do not want to go back to the overcrowded trains from pre-pandemic times, a view more strongly voiced by commuters

How to mitigate the crowds?

Passengers who used the train during the pandemic now love the space and travelling. There is, however, great concern, particularly amongst commuters, about how this will be maintained after lockdown when restrictions are eased and more people will travel by train. Similarly to cleanliness, crowd mitigation has developed since January of this year, when it was only about being able to socially distance. Now passengers want to avoid trains becoming crowded similar to levels experienced before the pandemic.

Key takeaway:

Crowd mitigation emerges as a key concern for passengers during and post Covid-19. It is here to stay and the rail sector has to get a better handle on it. There are no obvious solutions for this but passengers don't want to return to 'squeezing onto a train'.

What passengers want to see:

- **Crowd management pre-travel:** capacity checkers
- **Crowd management at stations:** effective communication (e.g. earlier platform announcements to avoid people rushing), platform access control and behaviour influence, train load information
- **Crowd management on the train:** more controlled getting on and off (e.g. traffic light system), reserved seating where possible and clear reassurances around standing and seating procedures – different messaging between long distance and commuting/shorter distances; more services during busier times and improved communication around that
- Alternative plans for when there is overcrowding
- What can be learned from crowd mitigation in other markets, e.g. Europe, Asia where crowds are perceived to be handled better

"Have more services at the earlier times but you are still going to have to observe some type of social distancing – either more carriages or more services going to certain locations."

Recent user, commuting



Fieldwork for this project was carried out in March 2021

“There is no way when commuting we can ensure social distancing. You are literally on top of each other.”

**Lapsed user,
commuting**



Live journey – Crowd mitigation



The story

How to deal with crowd management, especially as Covid restrictions and social distancing ease in the coming months, is arguably one of the biggest challenges facing the rail sector. A more Covid-confident live journey respondent who travelled for work on a London Overground and Southern service on Thursday 25th March further emphasised the importance of this issue for both himself (Covid confident) and his wife (Covid concerned).

Our respondent's main approach to this was to have *more staff at stations* and asking people to ensure they were keeping some distance and also suggesting others wait for the next train if one is already very busy. While he understood this might prove difficult across the network, actions like this *and making the public aware that rail operators are taking action like this* will go a long way to building significantly higher consumer trust in them.

Operators recognising that this will be one of the key drivers behind a potential lack of confidence in passengers as restrictions ease is the first stage to achieving the desired step change that is possible. After this recognition, trialling solutions and letting the public know about the results will help to build and rebuild trust in those who need it before they consider returning to pre-pandemic levels of train travel.

Fieldwork for this project was carried out in March 2021



Creating a more positive perception – Information provision

What works – Information provision

Passengers want more information about their journey, particularly with regard to how busy it is

Relying on technology and staff

Information provision becomes increasingly important, particularly in the future, when passengers want to compare different trains and select the one that is most convenient and suitable for them.

The Trainline app (and to a lesser extent website) is used by a large proportion of passengers because its information provision (e.g. advance platform information, whether social distancing is possible on a specific train, etc.) resonates with train users and is seen as superior to other websites. The National Rail Enquiries (NRE) app and website are mentioned for similar reasons but to a lesser extent.

The capacity checker and train load checker functions are generally liked when shown to respondents.

However, most said they do not really use individual TOC websites, so such a function would sit better on the Trainline or NRE apps and websites, being available for the whole GB rail network.

Staff are regularly mentioned for providing information since they give passengers reassurance that they get the correct information. Although this partly depends on staff availability – where views have been mixed (see also next section). It has been easier to get hold of staff at larger stations and ask questions, because there have been more of them, however, at some medium sized and smaller stations staff have become less available, especially later in the evening.

“On the website they had a thing, a little application called seat finder tool. That’s quite a good little tool that they’ve implemented because it’s quite comforting for someone who feels a bit vulnerable and doesn’t want to travel on the train etc. Especially as we look to get out of lockdown having that seat tool finder that would be very beneficial for people because it tells you how busy the train would be and where seats are available. So it allows us to keep the distance etc.”

Recent user, commuting



Fieldwork for this project was carried out in March 2021

Looking ahead – Information provision

Information is important to keep passengers in control of their journey

Making an informed decision

Passengers want to be able to make an informed decision about their journey

- when it's busy and
- during disruption

It is important for passengers to understand how busy a train is during Covid-19 to understand if social distancing is possible but also beyond the pandemic when working patterns might change and commuters, for example, want to travel outside their usual (or pre-pandemic) commuting times.



"If I have to be in town for a 9 o'clock audition and I would like to know at that point if I am going to be squashed in."

Recent user, business

"They need more general accessibility information, whether it's step-free, whether it's a long walk between areas etc."

Disabled user, lapsed, commuting

The information that passengers expect the rail sector to provide:

- How busy will my train be? Pre-travel information needs to become better and train specific, some is too generic (e.g. focuses on time periods rather than specific trains)
- What are the options when there is disruption and how long will it take?
- Have one body to represent the sector like NRE or Trainline (as per previous page) to ensure information is consistent across TOCs – see also communication section
- Seat reservation to be mandatory (where possible) and being able to see if the next seat is reserved (like Eurostar)
- Where do I need to be on the platform to get to my seat/carriage to avoid crowds?
- When booking a ticket online, provide a tick box check of what the passenger needs for the journey and needs to be doing, including a commitment to adhere to Covid-19 and other regulations (psychological commitment subconsciously improves behaviour)

Key takeaway:

Passengers want to stay in control of their journey and having this information empowers them to do so.

Fieldwork for this project was carried out in March 2021

Live journey – Information provision




The story

Another one of our live journey respondents travelling on Monday 29th March highlighted a need for improved information provision prior to a journey. She has been travelling every few weeks throughout the pandemic but remains quite Covid cautious, mainly due to also having mobility issues.

The experience on her journey was very positive with the respondent happy with the procedures in place and also everybody following the rules throughout. However, one area that could be improved to help reassure passengers is more information prior to a journey, especially for those who book well in advance as she does. She wants to see more alerts popping up on her phone, ideally from National Rail or the train operator about the journey.

Being a more nervous traveller, having regular and accurate travel updates is critical for this respondent in making arrangements and feeling comfortable. Especially for her as she is someone who has a car available but chooses to travel by train because she loves it so much!

Fieldwork for this project was carried out in March 2021

A high-angle, wide shot of a busy train platform. A long, sleek high-speed train with a blue and white livery is stopped at the platform. The platform is crowded with passengers, many of whom are carrying luggage. A red double-decker bus is visible on the platform. In the background, the station's architecture is visible, including a large clock and various signs. The overall scene depicts a busy, modern transportation hub.

Creating a more positive perception – Managing social distancing & face coverings

What works – Managing social distancing & face coverings

Social distancing and face coverings need to stay for a while. Staff are key to managing this and making passengers feel more comfortable travelling by train

Staff manage social distancing and the wearing of face coverings

Several passengers want face coverings and some form of social distancing to remain on trains; or at least will continue to do these even if not necessary. Clear and consistent guidelines on this is essential to passenger comfort and reassurance.

Staff provide reassurance to passengers, solely with their presence. Absence of staff during Covid-19 sends passengers a signal that it might not be safe to travel with the implication that staff avoid being at stations or on trains for that reason. Staff being around at stations or on board trains give passengers also a feeling of safety from other passengers (non-Covid related).

Staff are mentioned for providing examples of good behaviour by social distancing amongst themselves and wearing face covering, although views are mixed here. Some staff do not practice social distancing and do not wear a face covering or do not wear it properly. Such behaviour does not reassure passengers.

“There was enough staff around [at the station]. Staff came [actually] over and asked if I needed any help.”

Live journey, Scotland



Live journey – example of staff at Waterloo station



Fieldwork for this project was carried out in March 2021

Looking ahead – Managing social distancing & face coverings

There needs to be clearer guidance on the rules around social distancing and wearing face coverings and its enforcement

Staff expected to continue to lead by example

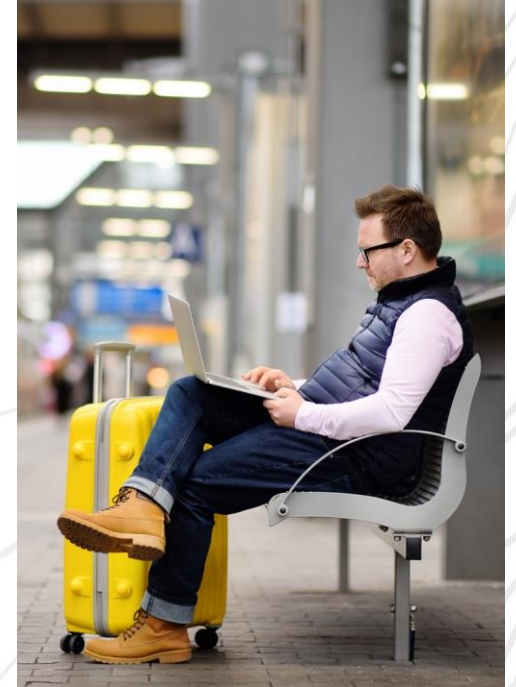
Passengers want clearer guidance on Covid regulations once society starts to open up again, and also on how they will be enforced. We have heard how most people want some measures to remain on the trains but it is the role of staff that is vital in ensuring long term confidence in travelling.

Passengers are looking for staff to set an example for following Covid regulations. Their behaviour is key – if they don't abide by the rules, how can one expect (other) passengers to do so?

Some passengers mention noticing greater staff numbers at stations or on trains. But more staff remains a common point as the public finds it reassuring to see their presence (as per previous page). Disabled passengers in particular think there are not enough staff to help them. The emphasis though needs to be on staff behaviour.

A recurring criticism is that it's not possible to recognise passengers who are exempt from wearing face coverings. This comes particularly from those who feel very strongly about Covid regulation enforcement. There is a strong desire for more awareness around exemption.

The sunflower lanyard, currently used for identifying those exempt from wearing a face covering (among others), is hardly known by anyone. It needs much greater prominence (since it would reassure passengers knowing if someone is exempt), like the 'Baby on board' sticker for pregnant women. Since the sunflower lanyard also identifies passengers who have a non-visible disability, disabled respondents in particular endorse this. It has to be borne in mind that the lanyard can be open to abuse since it can be purchased on Amazon.



Key takeaway:

It needs to be clear to both staff and passengers exactly what the regulations are as restrictions ease. The rail sector needs to decide whether to enforce or not and to what degree. The practice by shops of 'no mask, no entrance' is praised and passengers would like train operators to take a similar stand.

"Staff don't always make an effort to enforce rules, sometimes they are just on the phone."

Recent user, leisure

"[We need] More visible staff. Enforcing mask wearing as well."

Recent user, commuting

"When booking a ticket online, passengers should tick a box that they commit to adhering to Covid rules when using trains; this will not enforce anything but they will be aware that they made a psychological commitment."

Recent user, leisure

Fieldwork for this project was carried out in March 2021

Regulation enforcement – Managing social distancing & face coverings

Enforcing the wearing of face coverings generates mixed views but all passengers feel very strongly either way about it making the situation difficult to manage

Managing micro-aggression towards fellow passengers

Opinions are divided about regulation enforcement, with passengers feeling very strongly about this. When talking about regulation enforcement, respondents refer primarily to the wearing of face coverings rather than social distancing since the former is more obvious and potentially deliberate.

Passengers are looking for staff to ensure that train users wear face coverings even though there is an understanding that staff do not want to have any confrontation with passengers resulting from this. Therefore, there are mentions of employing the army, police and bouncers (who were unemployed due to Covid-19) to enforce this measure. Some display micro-aggression towards fellow passengers who do not wear a face covering and go as far as wanting train operators to practice a policy of 'no face covering, no train travel' similar to what shops do.

There was some discussion around 'no test, no train travel' and 'no vaccination, no train travel', however, such policies are seen as not practical even amongst those with stronger views. Temperature control measures were considered as being possible and desirable.

There were also some calls for prohibiting the consumption of alcohol on the train as that is seen as encouraging the breaking of rules (not wearing face coverings) by some. There was some finger-pointing by older respondents (45+ years) towards younger as being more likely not to wear face coverings or not to follow social distancing.

The view of wanting to see strong enforcement of wearing face coverings at stations and on trains is not limited to any particular segment although, as mentioned, views are mixed. Both Covid cautious as well as Covid confident travellers express such an opinion.

"If someone isn't wearing a mask it feels like an act of micro-aggression – you sit there silently seething, there's no enforcement, no one around to enforce mask wearing."

Lapsed user, leisure

"They need to have some people like army and police to enforce rules."

Lapsed user, leisure

"Alcohol should be banned on the train because that also prevents mask wearing."

User, commuter

Key takeaway – action points for TOCs and industry

- Be clear what is expected from passengers
- Be clear (to everyone) about exceptions and how they can be signalled (e.g. via sunflower lanyard)
- Staff lead by example
- Be clear (to passengers) what TOCs expect of their staff in terms of enforcement action
- As a minimum, staff should politely remind and ask people to follow the rules

Fieldwork for this project was carried out in March 2021

“Staff are important. It can be difficult as adults don’t like being told what to do but it is still important.”

**Disabled user, recent,
commuting**



Live journey – Managing social distancing & face coverings



The story

The topic of enforcement was a common one throughout the research with almost all passengers believing that more staff enforcing the rules would reassure them. One live journey respondent, who was more Covid cautious, detailed their experience on a Transport for Wales service on Thursday 25th March when en route to visit family which he was doing roughly every 4 weeks.

Whilst at the station, he witnessed staff members not social distancing from each other when having a conversation which “made him feel uncomfortable”. He also noted that other passengers were “not following the rules completely” which put him more on edge. Finally, once on the train, he had his ticket checked by the guard which was the first time since the pandemic started and he described the experience as “very weird”. He would have felt more comfortable had the guard been wearing a full face screen and if he had been made aware that someone would be coming around checking tickets now.

The behaviour of staff as well as them setting good examples of the rules they are meant to be enforcing will be a vital component in reassuring and then building trust in passengers that the TOCs are taking Covid safety seriously. Their role should also be focused on an advisory approach as passengers understand the potential risk to the safety of staff if they are too forceful so they will need to be supported in this.

Fieldwork for this project was carried out in March 2021

Boarding Lead	16:12 Boarding Swansea	16:12 Boarding Twyford	16:15 On time Hayes & Harlington	16:18 Boarding Bedwyn	16:22 Preparing Great Malvern	16:25 On time Radley	16:30 Boarding Taunton	16:10 Boarding Heathrow Airport Heathrow Express	Special Notices
at Slough for & Eton Ctl	***** THE FOLLOWING GWR TICKETS ARE NOT VALID: SUPER OFF PEAKS OFF PEAKS OFF PEAK DAYS ***** available and cycle rest GWR service	Change at Slough for Mindsor & Eton Ctl	***** DUE TO SHORT PLATFORMS, THE DOORS IN COACH 8 WILL NOT OPEN AT ACTON MAIN LINE, SOUTHALL AND HAYES. THE DOORS IN COACHES 7 AND 8 WILL NOT OPEN AT WEST EALING STATION Formed of 8 coaches. Great Western Railway	***** THE FOLLOWING GWR TICKETS ARE NOT VALID ON THIS SERVICE: SUPER OFF PEAKS ***** GWR service	Calling at: Page 2 of 2 Pershore Worcester Shrub Hl Worcester Fte St Malvern Link & Great Malvern. ervice to Oxford. Pleas GWR service	Calling at: Page 2 of 2 Pangbourne Goring & Streatley Cholsey Didcot Parkway Culham & Radley. Formed of 5 coaches. Great Western Railway	Calling at: Page 1 of 2 Reading Didcot Parkway Swindon Chippenham Bath Spa Bristol T Heads Nailsea & Backwell Yatton Worle Weston Supr Mare Highbridge & B rain. GWR service	16:25 On time Heathrow Airport Heathrow Express This train is for Terminal 2, 3 and 5. For Terminal 4 please change at Terminal 2 and 3.	16:0544

Creating a more positive perception – Sector investment

What works – Hearing about sector investment

The Government and train operators have taken some good investment steps in the sector – below are some ideas of what passengers like to hear about leading to a more positive image, particularly amongst commuters

Good infrastructure & processes

Technology: Passengers (especially younger) embrace contactless tickets over having to collect a paper ticket at the station. Not only is this a more seamless process but also more hygienic. Similarly they like the increased availability of information available pre- and during travel.

Rail stock: Passengers like new (and refurbished) trains. TOCs prioritising this come across more favourably.

Cleanliness: Similarly passengers like clean trains and have acknowledged and praised the new cleaning regimes which do not go unnoticed.

Financial incentives

In several other sectors, like retail, hospitality, visitor attractions and air travel, customers are often rewarded for their loyalty. Rail users like this financial incentive, either a reward or a discount, and want to see it on trains for the 'business' they provide to operators. Very few passengers are aware of rewards offered by individual TOCs.

Passengers like cheaper fares, bundled tickets, and other value for money offers. This is primarily driven by commuters but also more regular business and leisure travellers are grateful when they find these are available.

Greener travelling

Passengers recognise that train travel is one of the greenest forms of transport. Whilst this is not always the main reason for using the train, it certainly influences choice and selection over other modes, especially the car and planes.

Staff presence

The presence of staff gives reassurance to passengers and apparently increased staff numbers during the pandemic have been appreciated and made passengers feel safer.



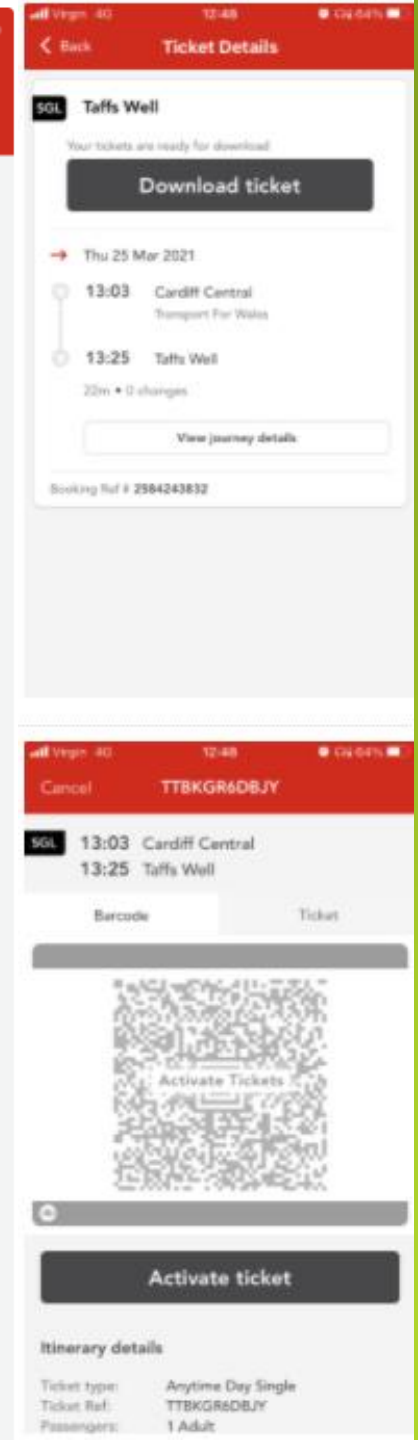
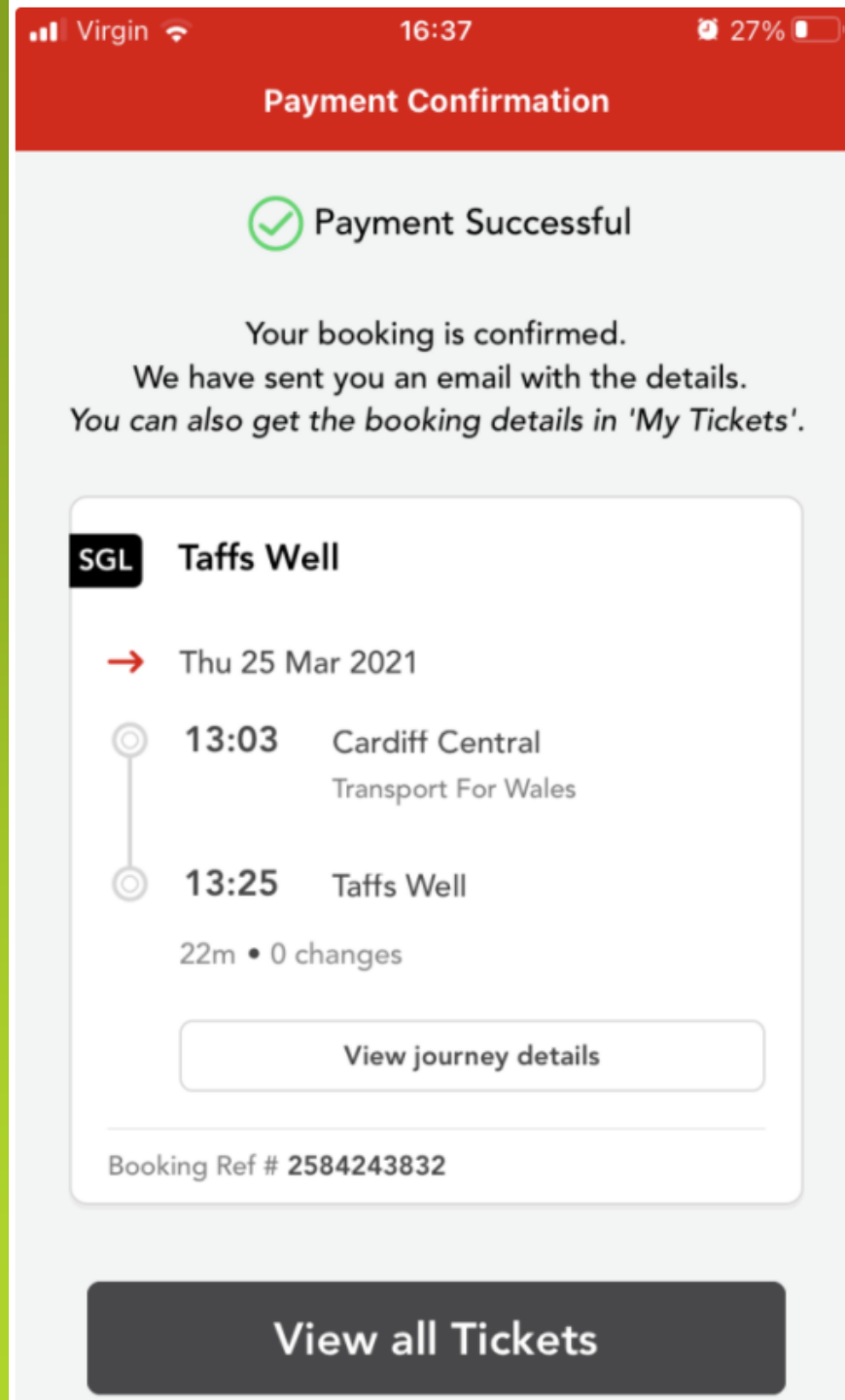
"I think a financial incentive would be a really good idea, it would definitely encourage me to travel, as I love getting deals."

Lapsed user, leisure

Fieldwork for this project was carried out in March 2021

"I booked the ticket via the Transport for Wales app, it was really easy. It takes two minutes instead of going to the train station and getting the ticket from the conductor or the ticket booth. I prefer the app so much more."

Live journey, Wales



Looking ahead – Show off sector investment more!

The investment made in the sector needs to be promoted to the public to a greater extent

Continuous investment

The move towards improved technology, information provision, cleaning processes and new and refurbished stations and trains is seen as a positive step. Passengers need reassurance that the rail sector will continue investment in these areas and not fall back to where it was pre-pandemic.

Being able to speak to someone

Despite enhanced technology and information provision, passengers would still like to see staff at stations and on trains. Wherever possible, passenger-facing staff numbers should be maintained or increased. Where this is not possible, they at least need to communicate to passengers how they can get hold of another person to help them easily and quickly. Staff are vital for comfort.

Improved perception of value

Ticket prices pre- and during the pandemic were seen as too expensive for a large proportion of train users, especially commuters. Improving the perception of value is vital and (among other actions) this can be helped through various offers. For example, bundled carnets (e.g. 5 or 10 to cover similar journeys that passengers make) that provide a discount of x%. Alternatively get x% off for every 10th or so ticket. The exact offer here needs to be refined but this idea was popular.

There are several ideas from passengers about what form a short-term financial incentive can take which are examined in more detail on the next page.

“As I’m conscious of the environment, I would take public transport to work as I felt this was an effective way to cut down on my carbon footprint.”

Lapsed user, commuting

Promoting green credentials

Continue investing in greener train travel. It is an attractive prospect, especially for younger travellers, and this will create positive sentiment. In addition to this, the clear advantage of trains over several other modes of transport needs greater promotion. Particularly in current times when the environment is a key concern for many people (see also communication section).



Fieldwork for this project was carried out in March 2021

Financial incentives – what passengers feel could be offered

Main ideas that emerged during the project – most passengers want to see a financial incentive introduced now to stimulate demand

Overall view

The common view is that if a short-term incentive were offered, demand would increase, mostly for leisure reasons. Some were concerned however about encouraging crowds of people as a result and so a considered approach is required.

Overall, passengers **did** favour some form of short term financial incentive but felt it needs to be handled in a way which would not promote a significant rush, so ideas such as partnerships with destinations and loyalty schemes were preferred.

‘Rail out to help out’

Based on the idea of the ‘Eat out to help out’ scheme offered last year to stimulate demand for restaurants. This idea had a mixed reception (prompted to respondents). Whilst some think it’s a good idea, there was concern that it could considerably boost passenger numbers over a short period of time, with social distancing no longer possible while the scheme runs, and would actively put off passengers.

Co-promotion with venues

Another popular idea was promotional offers for venues such as visitor attractions (e.g. reduced entrance fee) when the train is taken to get there.

This, however, requires an understanding of what passengers actually want a promotional offer for (not all want to visit an attraction but maybe rather a scenic beauty spot). This was generally very well received though.



Loyalty programme

Loyalty or reward programmes, similar to airline loyalty programmes were most commonly mentioned as an incentive for rail travel. In contrast to an incentive like ‘Rail out to help out’ it is more likely to create a more spread out increase in demand. It was endorsed by both new and recent passengers of all types of journeys.

“A lot of customers are not loyal to their current train operators, maybe a loyalty scheme would also be good.”

Recent user, commuting

The wider frame

Whilst financial incentives are clearly crucial, for broader context, findings from the 2021 IRPS, tell us that financial enticements, have less influence than other measures such as diligent Covid safety measures and punctuality.

Fieldwork for this project was carried out in March 2021

How to create the future – Communications



What is the desired approach?

What messaging works: content, tone, format, location? How can it help build trust?

Contents

1. What → 2. How → 3. Where → 4. When



Fieldwork for this project was carried out in March 2021

Communication – what makes a campaign more successful

Key areas to get right:

Content

- ✓ Informative (factual) campaigns are better at reassurance although are less likely to entice passengers back to trains
- ✓ 'Different' messages were more impactful. EG. Ventilation rather than wearing face coverings
- ✓ Emotional campaigns are better at encouragement, create excitement and will decrease lead times. They also stand out more
- ✓ Overall, a mixture appears to be the best approach. Appealing to the emotions excites passengers but many also need the reassurance

Key areas to get right:

Tone, style

- ✓ A mixture of tones is recommended. Firm messaging at stations. Softer messaging preferred online. Soft is less impactful for those who had already made the decision to travel
- ✓ Needs to be **Simple, realistic and concise**
- ✓ Strong preference for images and icons across all comms including posters at stations, website pages, video ads etc.
- ✓ Too much text is off-putting. Videos in general were well liked and could be leveraged more, especially on social media and websites



Fieldwork for this project was carried out in March 2021

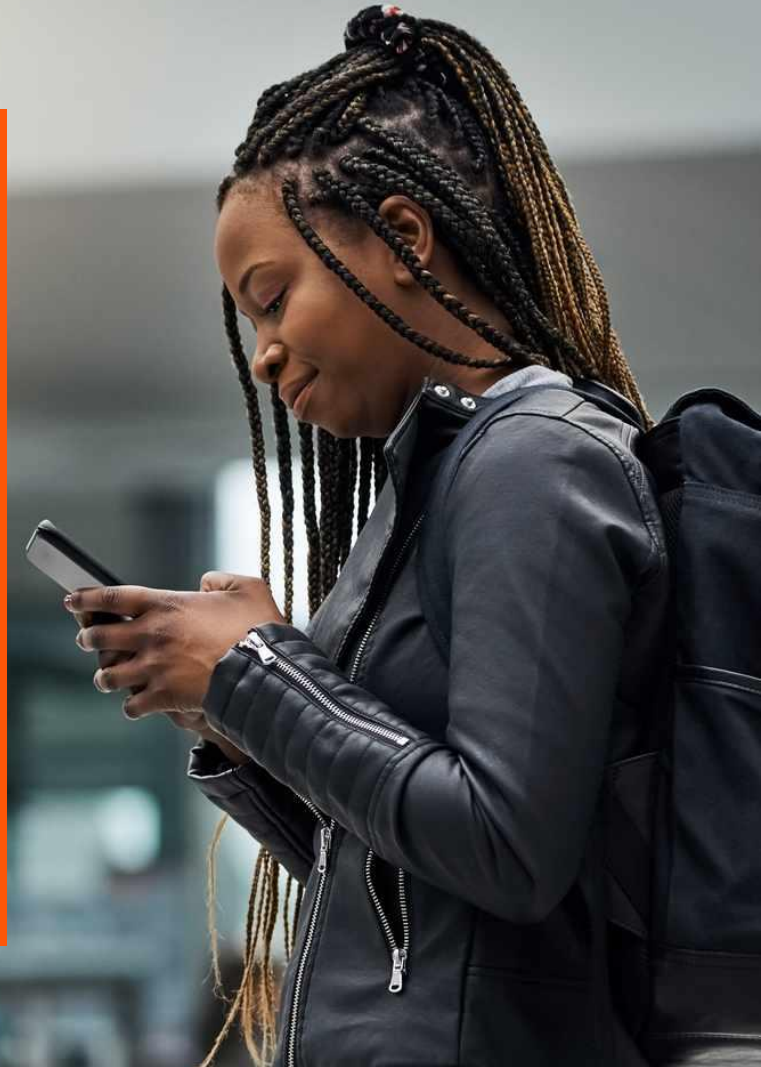
Communication – how best to reach people

Where?

- ! Certain messages and campaigns work better on certain channels
- ! Websites are a source of information but must be laid out clearly with the most important information easily available at the top
- ! Social media and apps are critical; especially for commuters. They build trust with frequent, accurate, live information provision
- ! Tannoy announcements and station posters are effective at delivering quick impactful messages

When?

- ! Up-to-date information is essential, especially as restrictions ease. Passengers want clear messaging about the rules on the trains and also the network
- ! Investing in pre-travel information is critical. There are deep concerns about busy trains and a strong desire to avoid this. TOCs need to provide live journey tracking information with in depth capacity checking capability
- ! Make this known to passengers now. Informative campaigns provide reassurance and build trust



Fieldwork for this project was carried out in March 2021

Hierarchy of needs funnel(s)

No one communications approach is suitable for all, balance is key to reaching the most people on the network

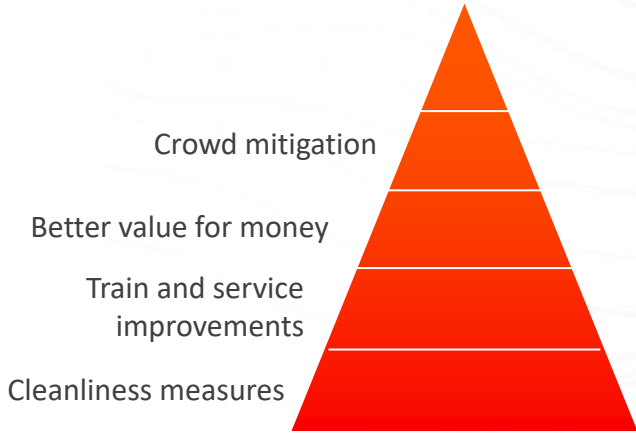
Different requirements

Here we highlight some of the needs of different segments for communications. The top of the funnel displays the overarching requirement and most important for that segment. As it goes down, the points were less consistently raised by that group but would nonetheless provide reassurance.



Commuters

Key requirement: Improved general service



Covid Cautious

Key requirement: Covid reassurance



Long distance/Leisure

Key requirement: Reassurance and comfort



Fieldwork for this project was carried out in March 2021

What is the right message?

Examples of promotional and brand communications, live throughout March were reviewed and assessed for impact and efficacy

What works and why (1)

Avanti focus on a Covid safety approach which is appreciated by many respondents

Communications

Across all customers, the right content is the key to good communications. Avanti take a Covid safety approach to their content and deliver it in an informative manner which was very successful

Video 1: Avanti West Coast – The video is available on Avanti's website to help customers plan and prepare for their journey. It received praise from all groups for its tone but resonated most with lapsed users and those less confident about travelling. The length of the video (3 min 11 sec) was the only drawback raised by respondents who said that they would not watch all of it

What resonated well

- It's a video. Videos were well liked by the vast majority of respondents, particularly on websites
- Clear content. Making it very clear how to go about every stage of a journey safely and what to expect at each step
- Provides reassurance on safety and what the railway is doing to mitigate Covid-19 as well as information about what passenger needs to do
- Content was delivered in a very positive, calming and engaging way. This came from the narrator, music and acting



Video 1

(removed from this version of this document to limit file size)

Key takeaway:

Have a clear goal in mind with the message. People like informative, and it will reassure the less confident, but it is not as enticing as other more emotional or experiential approaches.

Soundbites

- 🔊 Not patronising
- 🔊 Informative
- 🔊 Welcoming

"It's about people's health at the end of the day. They're concerned about your welfare rather than your money. Things like we're putting on more regular trains, we're putting in crowd control, we're enforcing the masks, we're providing anti-bac everywhere etc."

Disabled user, leisure

Fieldwork for this project was carried out in March 2021

What works and why (2)

National Rail have produced static online ads* with an informative message and tone about air ventilation which was very popular

Communications

This National Rail ad was received very well by all respondents and was described by many as the most reassuring they saw. The imagery and information were easy to understand and also respondents liked that it was a 'new' message they hadn't seen before on an important, transport-specific issue.

Image 1: National Rail – The amount of information was well liked by respondents, with many citing how easy it was to understand. Respondents also really liked the message itself as air ventilation is extremely important to them and was mentioned spontaneously by a few as well.

What resonated well

- Clear and obvious information. The ad provides information that can be read and understood very quickly
- Right quantity of information. The amount of information provided was perceived as a good mix of detail and brevity
- Reassurance that the trains are doing something themselves. Respondents reacted well to this as they felt that the trains were acting to make the journey safer rather than them being told what to do
- Common message. The information covers all trains and leaves little room for confusion



Image 1

Key takeaway:

A 'different' message has a bigger affect. Air ventilation is not as common as washing hands or social distancing but is also very important and attracts more attention than those other points due to it not being spoken about as much

Soundbites

- 🔊 Would love to be on a train that does this
- 🔊 Most reassuring
- 🔊 Actually tells you something

"I like the image – it's good with social distant seating and a good message. It shows what's being done and tells an actual story. It's more visual."

User, leisure

*For use as banners, on social media, etc. This is one among many executions with different content

Fieldwork for this project was carried out in March 2021

What works and why (3)

Northern have produced a more emotionally focused video encouraging respondents back on to the trains

Communications

Northern Rail have taken a more emotional approach with one of their recent videos, appealing to desires of those who are keen to get back out and doing things again. This approach improves perception amongst commuters, and also appeals to leisure travellers who are looking to make plans for the end of restrictions, but less so for those who need stronger reassurances

Video 2: Northern – This video would be expected on Northern's website, social media channels or even local TV. First impressions were very positive with respondents saying it made them want to travel 'now' and also improved their overall view of Northern. However, deeper reflection did highlight a concern around a lack of Covid reassurance, splitting opinion and showing need for balance

What resonated well

- Upbeat tone. The music and speed of the video engaged people instantly making it seem 'fun' and 'funky'
- Little Covid content. This splits opinion. Effective for recent users who 'do not pay attention' to Covid information anymore as they have become used to it
- Relevant and exciting content. Respondents were reminded of what they were missing and made them reconnect with their hobbies that they have not been able to do recently

"It's trying to get people excited to do things. A very different method of marketing and there's significantly less focus on cleanliness with just a brief mention, 'we're doing our thing'. It doesn't necessarily instil confidence but I think that probably gets people to think 'oh yeah, maybe I will go travel' whereas another one, instead of doing that, just reassures people who would probably be travelling anyway."

Lapsed user, leisure

Soundbites

- 🔊 Funky
- 🔊 Enticing
- 🔊 Enthusiasm

Key takeaway:

The most effective message has balance: 'We are Covid safe and can take you back to the places you want to go to'.

Fieldwork for this project was carried out in March 2021

What do passengers *need* to hear about?

The key items that are seen as ‘must haves’ by customers to be included in communications are mainly functional

Reassurance

Reassurance is essential, both that it is now safe for lapsed users and that the operators will maintain the recent pleasant experience for recent users

Overcrowding

Overcrowding was one of the biggest issues raised by both recent and lapsed users. How it’s going to be dealt with when restrictions ease in particular was a concern for respondents. Whatever measures are taken need to be made explicit to passengers

Cleanliness

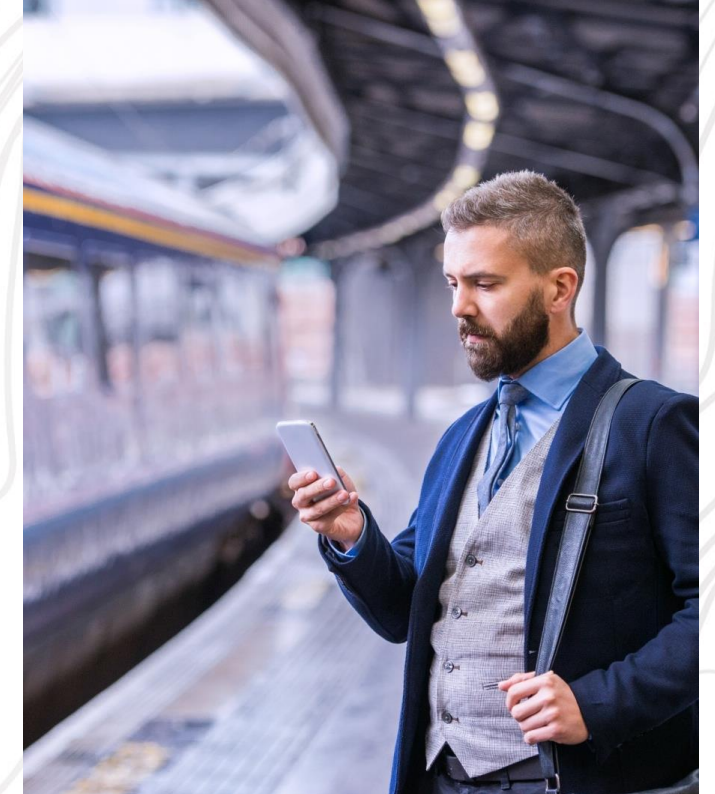
Cleanliness was another key point for many respondents. In addition to standard cleanliness messaging, respondents expressed an interest in actually seeing cleaners on trains and also cleaning rotas so this is a must have along with the detail

What is open (destinations)

Offices and leisure destinations being open is one of the key drivers of train usage and will encourage passengers back onto the trains. Operators should highlight this more to help inform the public about what is open and available on their network

Up-to-date messaging

Updating the message with changing regulations is critical for respondents. Many have been confused with mixed messaging from Government around public transport during the pandemic. It is key to have up-to-date, clear information on what the regulations are in place and recommended actions online and around the stations and trains as well as over the tannoy



*“We need to hear something about the load of the train, perhaps via an app – **prior** to getting on the train.”*

User, commuting

Fieldwork for this project was carried out in March 2021

Other messages that could generate positive outcomes

Further analysis into passengers' wants reveals a more emotional connection to travel which operators can tap in to

What's it like to travel by train now

One positive resulting from the pandemic has been the very pleasant experience felt by those who have been using the train during it. Creating a video or other communication that takes passengers through a journey step by step showing what it's like on a train now would prove very effective at giving reassurance; especially amongst lapsed users.

Greater focus on what is being done *for* passengers rather than *expected of* them

A lot of focus appears to be on what passengers need to do, but they want to hear more about what the rail industry is doing *for* them. This is all part of the reassurance and it helps to make the experience easier for passengers.

Experiences – where the train can take passengers

Something people have been missing is seeing friends, going to attractions and even going into work for some. The train journey allows decompression time on the commute for many workers. Some respondents mentioned partnerships with attractions or locations to entice them back. This will be different by TOC with some promoting city centres/business districts, some smaller towns, the seaside, etc. Operators should highlight these differences and the destinations they travel to more to help inform the public about what is open and available on their network.

"What they [train operators] are doing is, they are putting it on us, telling us what the rules are for us but they now need to tell us what they are doing."

Lapsed user, commuting

Other measures put in place by TOCs

Respondents liked hearing about other measures the trains were putting in place to appear proactive in their goal of making sure returning passengers feel safe and comfortable. The best example of this was on the air ventilation which went down very well with respondents. Other actions that the TOCs are taking should also be communicated. These could be small scale and drip-fed as all messages will contribute to a more positive whole image.

Improvements made on the railway

Something that all rail passengers want is improvement on the railways in general, whether this be newer trains, station enhancements or simply more staff. This is particularly powerful for commuters. This desire will never go away but it is more important now than ever to be positive about rail to reassure passengers and encourage them back. The industry needs to keep talking about non-Covid related improvements being planned and invested in to also pique curiosity and excitement.

Fieldwork for this project was carried out in March 2021

“This needs to be flipped on its head and rather than frightening people it should be about the positive things they [train operators] are doing.”

Lapsed user,
commuting



Fieldwork for this project was carried out in March 2021





What makes a successful campaign?

Tone of the message

Different tones work better with different audiences and at different stages of a journey thus, a mix of tones is effective

Reassuring / Positive

Although there was no consensus as to the 'right tone'; it is critical for providing reassurance to passengers.

There was a strong preference for more positive messages centred around kindness and unity: e.g. the 'We're all in this together' approach which encourages people to be considerate of others. Respondents felt that this would work better on 'outreach' channels such as online when trying to entice passengers back.

Informative / Educational

An informative approach to communications provides clarity, detail and confidence to travellers. It is therefore considered to be most effective at the planning stage of a journey once a passenger has already decided to travel. An effective technique is to highlight information one would not necessarily think about, such as the air ventilation ad seen previously.

Some passengers want great detail and statistics, albeit still easy to understand, but are happy if this is provided deeper in a website rather than in any communications.

"Better to have more, be more informative – better to have 12 or so key things which are easy to read and accessible."

Lapsed user, business

"Educating us what it's going to be like and what they are doing. Can't emphasise enough about positive messages. You can educate without instilling fear upon people."

Lapsed user, commuting

Fierce / Firm

Fierce messages (i.e. about fines, punishments) are also liked by some, particularly older age groups. Whilst these were eye-catching messages, some felt that they were too harsh and felt that they should be used in specific circumstances only. These messages are most impactful actually on the journey itself and are also a good source of reassurance for more nervous travellers at stations or on trains.

Pros

- Impactful: Pointing out the consequences of not complying with the rules
- Reassuring: But passengers need to see fierce messages enforced

"Upbeat because everyone has been beaten down over the past year, put a cheer to everyone."

User, leisure



Fieldwork for this project was carried out in March 2021

Style of the message

Concise and honest messages can help build higher engagement and trust

Simplicity and authenticity are key

Most effective for respondents was to have a **simple and to-the-point** message. This helps to engage passengers and connect them with the message provided it is easy to assimilate. It also means they take it in better, ensuring more clarity regarding what it is they need to be doing. For instance, a tagline approach is easy to read and more memorable.

The majority of respondents say they switch off instantly when they see a lot of text and so this must be avoided.

Another recurring point raised by respondents was the **authenticity** of communications; including on TOC websites. Many raised concerns, particularly when looking online, that the displayed experience was not **realistic**. Whilst passengers do not want to see bad things, they want to see realistic images that they can personally relate to. This is important in building trust in the long term and strengthening relationships.

Some respondents felt in the past that they have received some contradictory messages from TOCs and their websites which can very quickly undo all of the reassurance TOCs are trying to provide.

In order to be impactful and grab your attention easily, communications should also be **interesting and relatable**. Making it a talking point could increase word of mouth messaging.

Specific: Giving examples is a good way to help people better understand the content provided and achieve better clarity. This works for both Covid messaging and other communications. For example, specific examples would work well with train/station developments that might be happening. Passengers want to see pictures of new train stock being rolled out or a new waiting lounge being built.

"It all needs to be much simpler, maybe with a tagline."

User, commuting

"If you have a very generic message then not a lot of people will get it. In London you will have a tailor made billboard where it's got a nice quote and I pay a lot more attention to that."

User, business



"Almost seems dystopian. [They've] made it look very easy with no queuing onto the train...but when you look at it, this looks like an ideal situation on the train and not the reality."

Lapsed user, commuting

Fieldwork for this project was carried out in March 2021

Format of the message

More visual communication formats (i.e. icons, images and videos) are preferred and these need to be used/promoted more

Video

Videos were well liked in general by respondents as a method of communication; feeling that they help to bring the message to life.

However, several respondents agreed that they would not go looking for these and so they need to be promoted more and available in more places to have a bigger impact. Videos that were more popular generally were shorter, had a light tone and some background music.

One well liked idea to engage passengers was to have a video pop up automatically on the website and play. Social media also needs to be leveraged more.

Popular: Southeastern informative video

Less popular: Chiltern cleaning video: 'It's like being told off by my mum – did not feel very warm.'

"Not going to read the page with all the bullets and masses of text – looks like insurance terms and conditions."

User, commuting

Imagery

Icons were preferred to text by almost all respondents. Icons on TOC websites as links as well as posters around stations received much better feedback than text and were much more user-friendly. There was a common opinion that icons were not used enough particularly on TOC websites.

Images are popular as they capture attention better but these need to be realistic and reassuring (i.e. a picture of a person cleaning sends a reassuring message). This relates to any and all communications.

Posters

Posters are important for reassuring passengers at the station. Effective posters clearly tell you what you need to do/what is being done with minimal text. They generally use icons and images, and need to be positioned in places around the station/train which will be most in sight for passengers passing through.

Less effective posters contain too much text and so seen as off-putting. Others commented on noticing posters which were too small or in a part of a station or platform that did not get much footfall.

Text

Text is of course still required but it is important that it is easy to read and to-the point: bullet point format was well liked.

There is a place for text-heavy, detailed messaging but again respondents felt that this should not be on platforms or areas of stations where people would walk past. Instead, these messages should be found after one or two clicks on websites as is only really necessary for those interested in looking for a very detailed level of information.

"Watching a video would be good so that you can see exactly what it's like."

Lapsed user, commuting

"You know what they mean so you want to look what the text says."

User, leisure

Fieldwork for this project was carried out in March 2021

“Positive words and positive messages, calming colours are definitely more reassuring.”

**Lapsed user,
commuting**



“Love these barriers which keep people separate that are walking in different directions. I like them because they use positive non scaremongering language. ‘To help you safe, you can...’ It feels non threatening but clear and accessible. It does not make you panic like a lot of the news / government info.”

Live Journey, business



One national message vs. individual TOC messages

Passengers' feedback highlighted the importance of a consistent message provided by the industry rather than differences by TOC

Commentary

A common theme which recurred throughout the groups and interviews was a desire for repetitive and consistent messaging. It is clear that a consistent approach to communications would ease confusion over regulations, particularly as they evolve with the roadmap, and help to build trust with the network again.

Respondents appreciated that there are benefits to local messages, particularly if it involved crossing a national border. These would work well over local radio and TV stations. However there was agreement that too much local messaging would impact trust with the network as a whole as it would cause confusion. Therefore, the preference was for greater national and industry-wide messaging which is more consistent.

Location for different messages was seen as very important in building trust with respondents. Many wanted the same, national messages across all stations – much like we saw in the previous slide with the barriers. This would also help instil confidence and reassurance that the regulations were the same and there could be no confusion. TOC messaging being heard on local radio and TV stations would work well and also on their own social media channels but these should focus on enticing customers back.

Another key channel for delivering a consistent, national message is apps such as Trainline or National Rail Enquiries. To many respondents, these represent the whole sector and so having a consistent message here also plays a part in providing confidence and trust.



“The message should be the same for all train companies. Better still it should be one message under one umbrella, like National Rail or Trainline. That would be more powerful.”

User, commuting

“If it’s from National Rail, you would likely to see this more and if it has this name you would expect to see this across the networks. National Rail is a stamp of reassurance.”

Lapsed user, commuting

Fieldwork for this project was carried out in March 2021

“It would be good to have one voice, one rule message coming from the top.”

User, leisure



Websites – what works

The majority of respondents were impressed by TOC websites with several positive reflections

Key info at the top of the page

Most respondents use TOC websites with a specific idea of the information they want to find in their mind. It therefore needs to be as easy as possible for them to find with the key areas being at the front or top of the landing page. Key areas for respondents include: Covid information, assisted travel information, live train updates and finding train times.

Effective and realistic visuals

This is arguably the most important factor in engaging passengers. Almost all of them prefer the use of icons and images for information rather than lots of text. This can be tidied away via links to further information if wanted. The images need to be authentic and be recognisable to the respondents as this is a key issue for many.

Highlighting the good experience

All recent users surveyed felt that their experience was better than it was pre pandemic. This is a key point to leverage for operators and videos displaying what's good about that experience goes a long way to encouraging passengers onto the trains.

Broken down information

Bulk text is a big put off for respondents, particularly on a landing page. More links to information is preferable to continued text.

Up-to-date information

Respondents often use websites for information when measures or guidance changes and so it is critical that this is kept as live and up-to-date as possible. This will also help to build trust with passengers.

Fieldwork for this project was carried out in March 2021

“This is much more visual and all more pleasing. It’s easier to follow if there are some key points, easier to digest, looking at it. Icons and visualisation. It’s easier for the brain to absorb.”

User, leisure (in response to a specific TOC’s website)



Websites – what doesn't work so well

Feedback on TOC websites was positive but respondents think that each have room for improvement

Key issues included:



Too text heavy

Don't have too much text! One respondent described the text on a website as looking like Terms & Conditions. Websites that used icons and images to communicate rather than text received significantly better feedback

Unrealistic imagery

Some respondents felt that aspects of a website, images in particular, were not reflective of the actual service offering. Passengers want positive but realistic and authentic

An off-putting tone

Tone is important on websites as it needs to be instructive but not too assertive that it becomes off-putting. This is particularly important when considering some of the communications on the websites. One respondent said of the cleaning video on a TOC website that it was "like being told off by your mum"

Inconsistencies between sources

Many respondents use the Trainline and TOC websites to search for and book trains. There needs to be consistency with the content and quantity of messages put out by TOCs and Trainline. Recall of information is sometimes negligible so this is also a key area to improve in some cases

Too aggressive Covid messaging

Another frequent comment which arose was that the Covid warnings were too dissuasive for travelling on some TOCs. Whilst all respondents recognised the need to have Covid information immediately visible, the majority did not want it to dominate the screen

Key takeaway:

The simpler the better!

Fieldwork for this project was carried out in March 2021

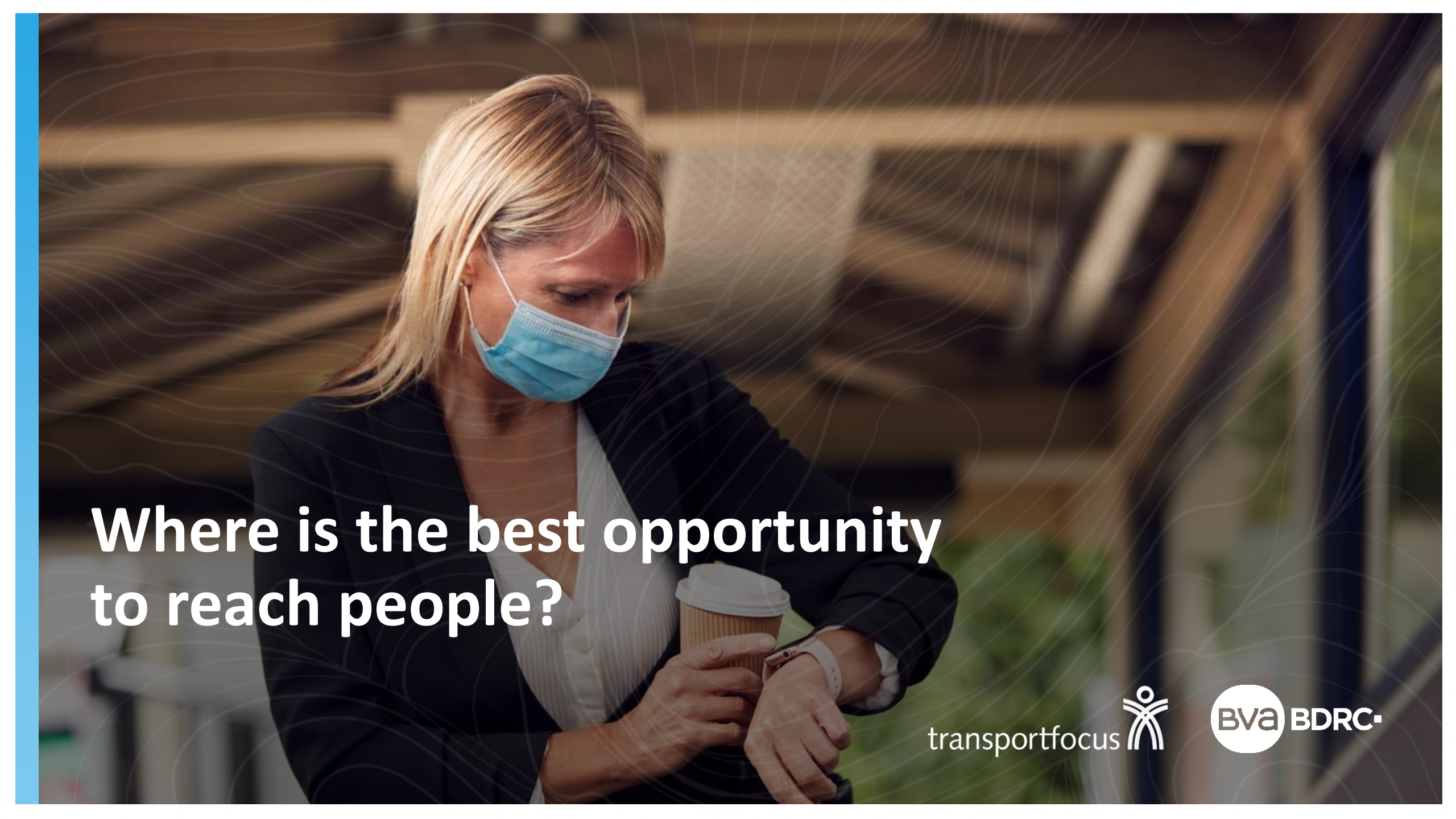
“It’s too in your face and there are too many words, it needs to be more to the point. People will think I don’t have time to read this. Make it more appealing so that people take the time to read it.”

User, leisure (in response to a specific TOC’s website)



Fieldwork for this project was carried out in March 2021





**Where is the best opportunity
to reach people?**

Where have they noticed information during the pandemic?

Minimal communications received from train companies, emails and posters at the station/on train were most memorable

Where?

- Emails from third party platforms (i.e. Trainline) but also some TOCs (i.e. LNER, ScotRail)
- In stations and on trains: posters
- TV/radio (i.e. TFL, Northern)
- News articles
- Twitter: individual TOCs

Not much communication

Predominantly, information provision during the pandemic was seen as scarce by both recent and lapsed users. In some cases where information was noticed, it was not memorable – lapsed users were less likely to pay attention to communications as they were not planning to travel for a long time.

Emails were the most memorable form of messaging; however, they would only be received by travelers who opted in. Posters at stations and on trains were also remembered by some but of course would not reach lapsed users.

Key takeaway:

Different channels should be used to reach larger audiences (i.e. those who are not signed up to receive emails from TOCs) but most importantly, more noise is needed, especially now!

"I can't recall seeing anything directly from train providers. I think I had an email from the Trainline saying about reduced services and reassuring us they are taking precautions. I think it is good that they are showing they care by providing the information without having to look for it."

User, commuting

"My train company has this advert at the top of their Twitter account and also a new slogan 'travel with confidence' which is reassuring at this time."

Lapsed user, leisure



Fieldwork for this project was carried out in March 2021

Which channels will be most impactful going forward?

Convenience and ease of finding information is key but consider your audience and therefore message when using different channels

Communications

While individual TOC websites are seen as better for information sourcing (i.e. more information and visual content), in reality passengers use them less frequently. Centralised platforms (such as Trainline or NRE) are used more often for booking tickets and thus, in some cases unknowingly, information provision.

Passengers appreciate ease of locating information and having it all in one place; avoiding an extensive search is preferable and it also makes them feel more comfortable as they have done it before.

Different channels should be used for providing different types of information to different audiences. For instance, while social media is more suitable for commuters, apps and tannoy announcements are preferred by leisure travellers.

Key takeaway:

Information must be displayed in logical, passenger friendly channels which are easy/convenient to find for different audiences.

What resonated well

- **Tannoy** announcements at stations and on trains are a convenient channel for information provision. These are popular as they can be frequent and there is nothing the passenger needs to do but listen. Repetition is also no bad thing as passengers accept that a message repeated every 5-10 minutes is necessary.
- **Trainline app/website** is most frequently used, however, it isn't always perceived positively in terms of Covid information so better understanding here would create more positive sentiment with the TOCs themselves.
- **Social media** is frequently used to source information and is critical for commuters and younger travellers. Message needs to be short and very up-to-date to instil trust.
- **Mass media** (i.e. TV, radio, online pop ups): these channels can reach large audiences and can direct people to more detailed information
- **Emails/texts** were the most memorable form of messaging as is more direct. These must be used to inform passengers about any changes to their journey or plans which will lead to long term trust and confidence in TOCs.

"I would like to see email reminders as how to prepare to enter the station and what rules are in place both in the station and on the train so people are aware of what to expect."

User, leisure



"If you do put comms on the website make it the first thing you see on the landing page"

User, leisure

Fieldwork for this project was carried out in March 2021

When do they want these messages?

Pre-travel information is essential, especially important at the booking stage. Key messages to be repeated and updated in line with easing of restrictions

Communications

As discussed, different types of messages should be provided at different stages of the journey. For instance, information at booking stage may be more effective for leisure/long distance travellers who tend to book tickets in advance whereas for commuters, messages at the station and direct via email/text are more memorable.

Providing up-to-date, live information is critical for building trust and strengthening relationships. Therefore, managing change throughout the easing of restrictions and updating messaging in real time in line with the roadmap out of lockdown is very important to keep the public well informed.

It is also important to bear in mind that people will start using trains at different points in time. While some are already travelling now, others will begin in the near future and others much later (i.e. once the majority of the population has been vaccinated). Therefore, key messages will need to be repeated to ensure all will receive relevant information at different points in time.

What resonated well

- **Pre-travel / pre-booking**
- **At booking stage:** critical communication point as this is a key time when TOCs can provide additional re-assurance to passengers and make them feel safe before their journey
- **On approach to station:** clear and easy to assimilate messages when on-the-go
- **At the station:** important for grabbing the attention of busy audiences such as commuters
- Updated communications whenever rules change as part of the roadmap out of lockdown

Key takeaway:

Information pre-journey helps with making passengers feel less concerned about train travel.

Different messages are better suited at different stages of the journey.

"It really puts my mind at ease when I'm booking a ticket knowing that I'm not going to be sitting near anyone."

User, leisure

"It really depends on when the information is given. Putting the message when on the platform might be too late for a message about masks."

User, commuting



Fieldwork for this project was carried out in March 2021

“Let us know what you’re doing, it seems like you’re doing things but it’s not clear what you’re doing to make things safer.”

Lapsed user, leisure



Appendix



Background and context

The passenger experience surveys that Transport Focus runs for the rail and bus sectors did not take place in Autumn 2020 and Spring 2021, which is when they are usually conducted, due to the impact of Covid-19.

Instead Transport Focus have been conducting a range of research to understand both passenger experience for those who have continued to travel and the needs and priorities of recent and returning passengers in the short, medium and longer term future.

As part of this, Transport Focus is working with BVA BDRC on a large quantitative survey – the 2021 Interim Rail Passenger Survey (IRPS) which was informed by a qualitative study carried out earlier this year.

Transport Focus wanted to build further on the research that has taken place amongst rail passengers with a larger, more detailed, qualitative study that focuses particularly on understanding different passenger segments and exploring how themes identified in the first phase may have developed following the government's recent roadmap out of the pandemic.

Fieldwork for the quantitative component of the IRPS finished earlier this month with a final report due early May which will include some elements of this report to provide some more detailed context.



Fieldwork for this project was carried out in March 2021

Research objectives

The overarching goal of the IRPS is:

- To understand rail passenger (recent and lapsed) experiences and perceptions of, and expectations and priorities for travelling during and after the Covid-19 pandemic
- To identify key actions and messages that will be required to encourage a return to rail
- To identify ways to help recent passengers feel comfortable when travelling by train

This qualitative research built upon what we had already learned during phase 1 of the IRPS, and provides a wider viewpoint. Specific areas in which this further qualitative work sought to bring additional value, include:

- Opportunity for more live moderated discussion
- Ability to split findings more robustly by different passenger groups (differences by segment are referred to throughout the report)
- Opportunity to hear more from recent users specifically, ideally including feedback on real journeys with video/image illustration
- Exploration of how attitudes might be developing now, especially with more positive news from the government recently
- Further exploration to fill any gaps in findings from the previous qualitative stage

Fieldwork for this project was carried out in March 2021

The objectives on the left are based on the initial brief, however, it is important to point out that objectives developed further in the early stages of the project.

Further important topic areas that the project needed to cover were added as follows:

- To hear people's experiences of travel during the pandemic
- What are they feeling and experiencing at the moment in terms of travelling right now?
 - This will inform people's attitudes for the future, and it will help the sector understand what works well and less well from passengers' perspectives

All of these points will inform messages and plans for future rail travel.

Following these additional objectives, the report focuses on future requirements and opportunities, as well as on messaging in the short and medium term future.



Approach and fieldwork dates

Recent and lapsed train users and disabled passengers

We developed a three day programme for each respondent with around 30 minutes of activities for the first two days and 60 minutes for the third day when a live discussion took place. For the first two days we used our Recollective platform for respondents to record their responses; for the live discussion we used Zoom.

The 2 day activity guide on Recollective focused on the following areas:

Day 1

- About the passenger, impact on the pandemic
- Attitudes, travel before and during Covid-19 plus travel summary

Day 2

- Rail travel in the future; what would encourage it?
- Information needs
- Financial incentives
- Return lead times

Day 3

- Live discussion with focus on what respondents want rail operators to do in the future and on communications and messaging (depths with disabled passengers)

Live journeys

Rail users completed a string of tasks as they took a live journey on a train, providing feedback in the moment. This helped to get a better understanding of what travelling by train is like during the pandemic.

The live journey focus was on the actual experience from booking to arriving at the destination and any communication from train operators seen during the various journey stages. Respondents were asked to produce a selfie video at the end summarising their journey.

Later after the journey or the next day a depth interview was conducted, going through the journey stages and discussing any communication noticed by passengers. Journeys were not conducted specifically for this research but were made by respondents anyway.

Fieldwork dates

Fieldwork took place from 12 March to 6 April 2021, with the majority carried out during March. Only two depths were conducted during April.

Fieldwork for this project was carried out in March 2021

Sample overview – groups

	User status	Covid attitude	Passenger type	Journey distance	Area of residence	No. of respondents
Group 1	Users	Covid concerned	Commuter		England	4
Group 2	Users	Not Covid concerned	Commuter		London	5
Group 3	Users	Covid concerned	Leisure	Long distance	Scotland	4
Group 4	Users	Not Covid concerned	Commuter & business		England	5
Group 5	Users	Not Covid concerned	Leisure	Short distance	Wales	5
Group 6	Users	Not Covid concerned	Leisure	Long distance	England	4
Group 7	Lapsed	Covid concerned	Commuter		Wales	4
Group 8	Lapsed	Covid concerned	Commuter & business		England	5
Group 9	Lapsed	Covid concerned	Leisure	Short distance	London	4
Group 10	Lapsed	Not Covid concerned	Commuter & business		England	5
Group 11	Lapsed	Not Covid concerned	Leisure	Short distance	Scotland	5
Group 12	Lapsed	Not Covid concerned	Leisure	Long distance	England	4

Fieldwork for this project was carried out in March 2021

Eligibility:

- Recent users – used the train in the last 3 months; may have used during the pandemic (prior to last 3 months) and also before the pandemic
- Lapsed users – used the train before the pandemic but have not used it during the pandemic or to a lesser extent; have not used the train in the last 3 months
- Non-rejecters of trains

Other criteria:

- Mix of ethnic background
- Mix of multi-mode users (when using the train) vs. using only the train
- Spread of rural, suburban and urban residents
- Mix of gender
- Good spread of age across the groups from 18 to 75+ years (mixed within groups)

Total of 54 respondents.

Sample overview – passengers with disabilities and live journeys

Passengers with disabilities

- 1x Wales, 1x Scotland, 1x London, 4x rest of England
- Spread of disabilities
- Mix of users and lapsed users – same eligibility as for groups
- Mix of passenger type
- Mix of rural, suburban and urban journeys
- Mix of age and gender

Total of 7 respondents.

Live journey respondents

- 1x Wales, 1x Scotland, 2x London, 3x rest of England
- Mix of rural, suburban and urban journeys
- Mix of shorter (20-90 minutes) and longer (90 mins+) journeys
- Mix of passenger type between commuters and leisure (necessary journeys)
- They must have made the journey for a legitimate reason, not for the purpose of this research
- Mix of age and gender

Total of 7 respondents.



Fieldwork for this project was carried out in March 2021