



Transport Focus stakeholder audit 2022

Introduction

Transport Focus makes a difference for current and potential future transport users. We use our world-class insight to influence decisionmakers and policymakers across Britain, as well as exploring and sharing best practice across sectors and geographical areas. Our relationships with stakeholders are crucial to our work.

The transport world faces significant challenges, the most significant being decarbonisation. Transport Focus's work will support the delivery of the Government's *Transport Decarbonisation Plan*, Transport Scotland's *Rail Services Decarbonisation Action Plan* and the Welsh Government's *A route map for decarbonisation across the Welsh public sector*. Alongside this, in 2022-23 there will be major reforms to rail in Great Britain and bus in England. We'll ensure consumers are front of mind when plans are made.

In early 2022 we reviewed our stakeholder relationships to ensure we're in a good place to push the consumer voice. We used a large-scale online survey with some in-depth interviews with a smaller number of key contacts. The results make encouraging reading. We thank all those who took part for being so generous with their time and frank with their views.

Following on from this work, we will:

- engage our key stakeholders more as we develop next year's workplan
- continue celebrating the work of our people, and empowering them to keep on doing what they do to make a difference for transport users
- continue developing our work to help the sustainability debate.



Sarah Wright
Senior insight advisor



Sara Nelson
Head of communications

5 key findings from the research overall

7 in 10 stakeholders feel 'informed' about Transport Focus work. Key stakeholders are generally happy with the way they are kept informed. This is usually via their point of contact and/or the newsletter

8 in 10 stakeholders perceive Transport Focus to be 'useful' for its unique position, insight and influence. Even if not seen to be 'noisy' or 'achieving wins', its work is a catalyst for others to lobby.

Almost all cited the **work during covid** as being the most useful contribution to their business / the industry (esp. the more 'timely' reporting)

Staff at Transport Focus are pivotal to helping build **strong relationships and trust** and thus have access to the right places, and respect from the right people (decisionmakers) to be able to get the passenger voice heard

While the majority see independence as one of Transport Focus's strengths, some question if the funding model is a constraint

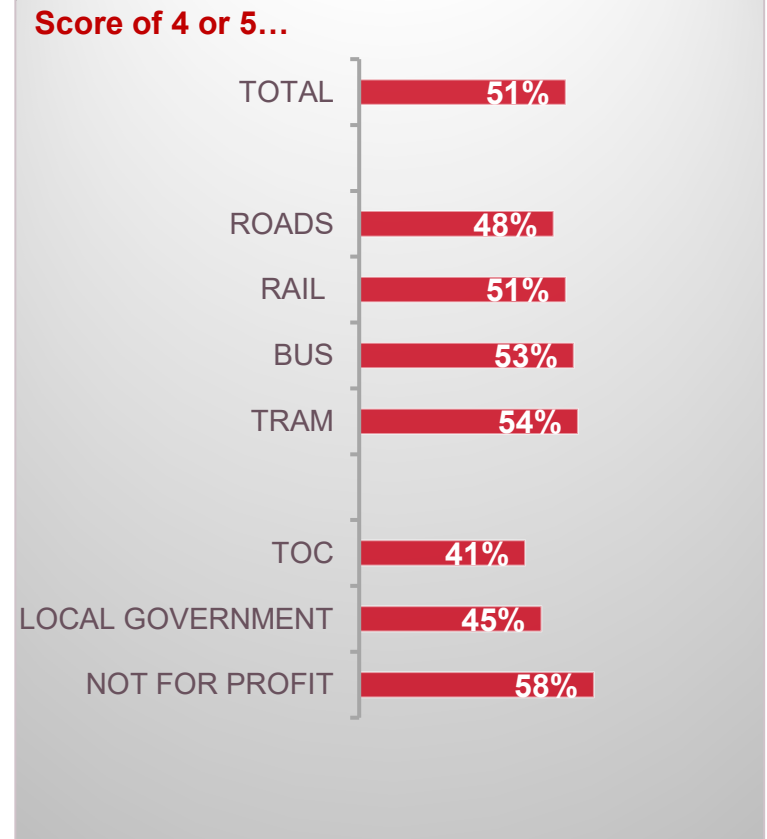
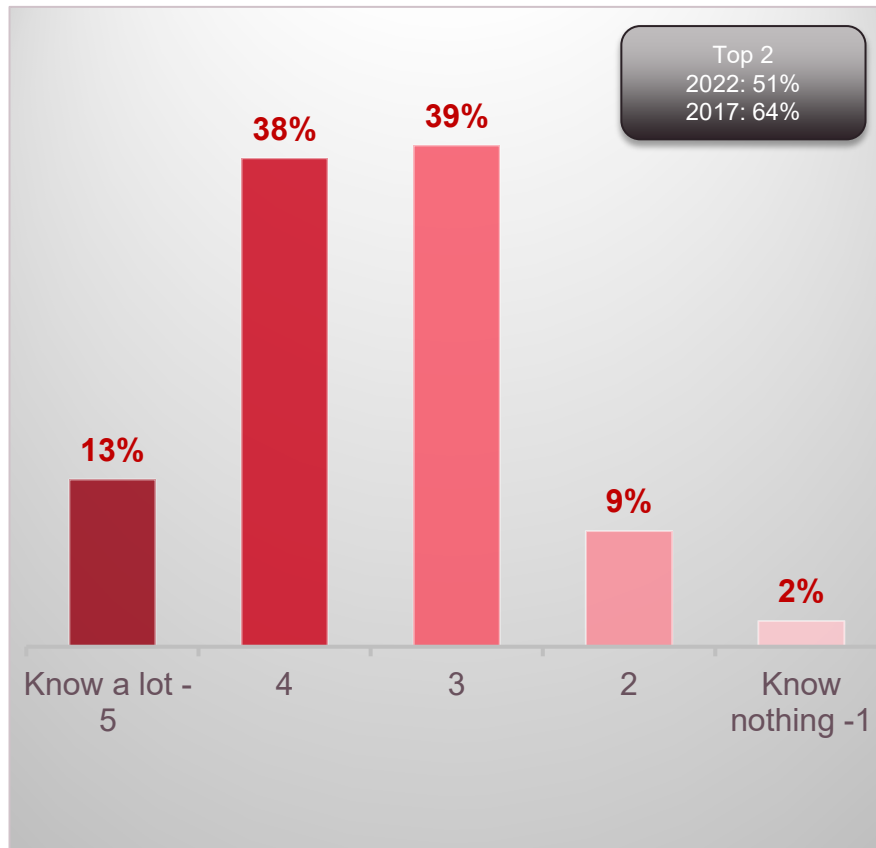
There's a desire to see Transport Focus's **future workplans** and a yearning for it to hold a stronger thought leadership role in this time of transition within the industry especially around **sustainability** and some of the big issues in the transport world (modal shift, integrated transport solutions, inclusivity/accessibility, congestion etc)



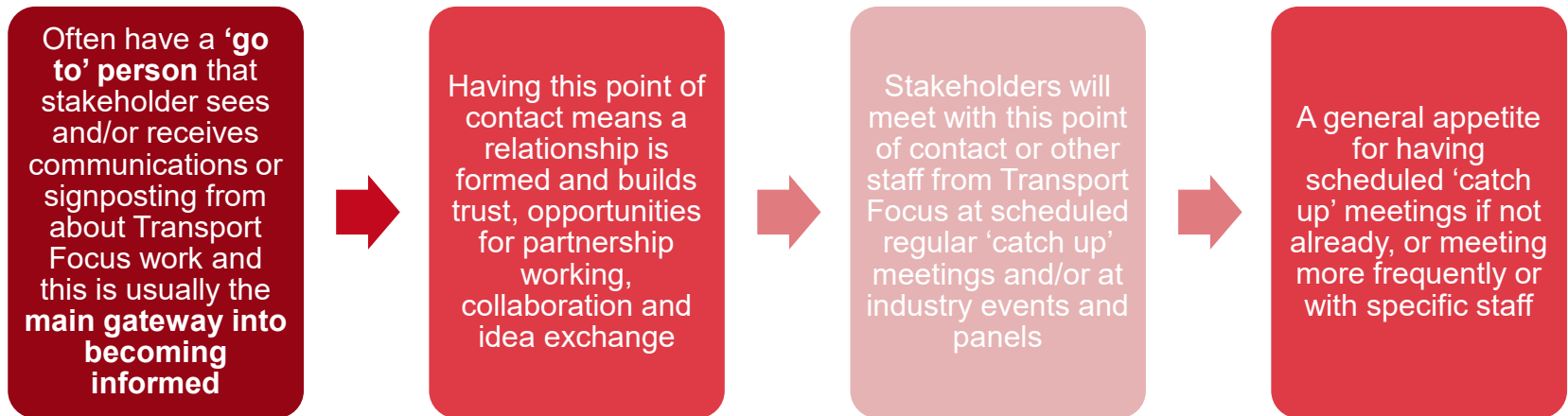
Awareness and knowledge about Transport Focus

Almost all stakeholder participants had some knowledge of Transport Focus and 13% said they 'know a lot'

Overall knowledge about Transport Focus

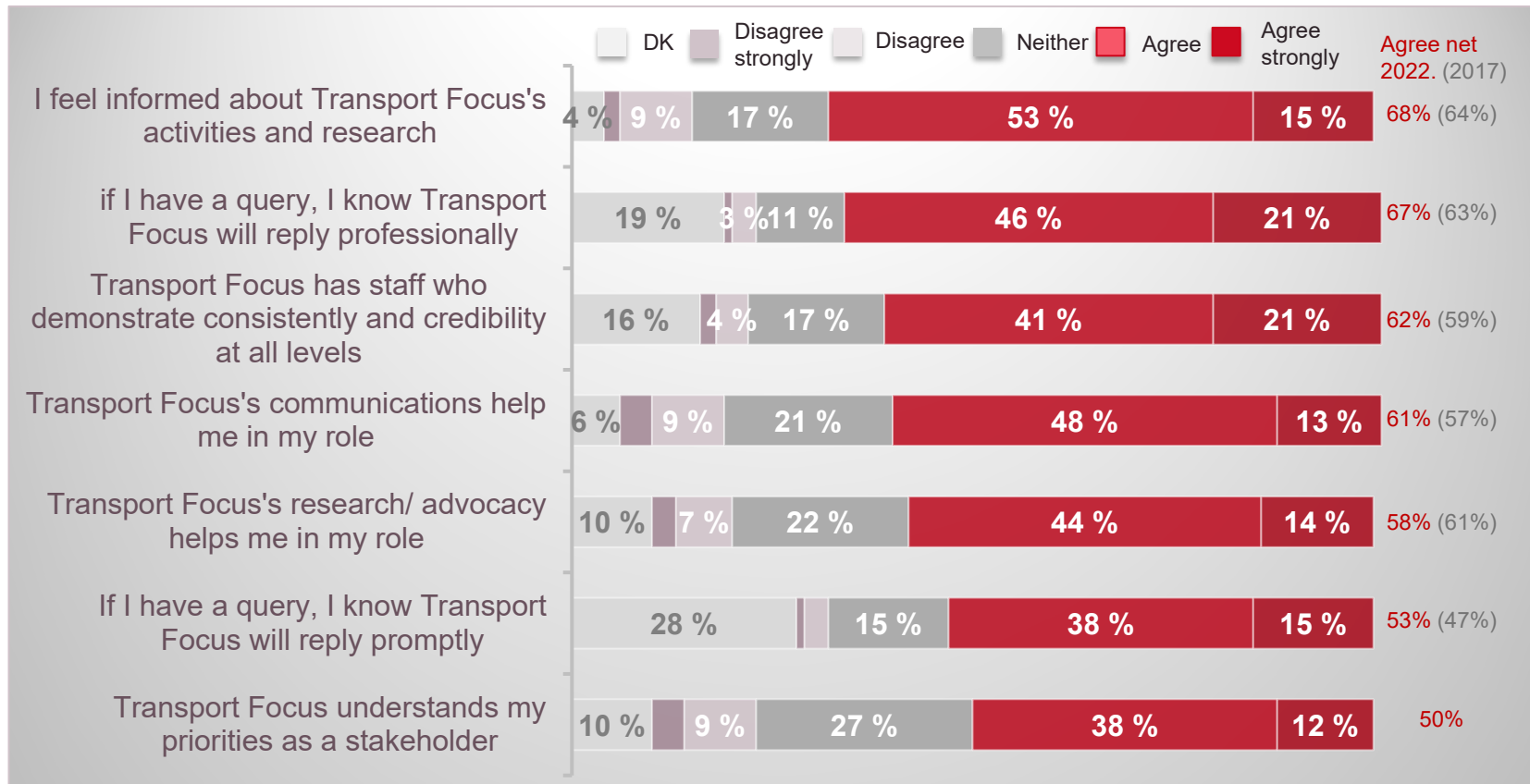


Most 'key' stakeholders feel well informed within their area or mode about Transport Focus activities



Nearly 7 in 10 (68%) felt informed about Transport Focus activities and research. 1 in 10 disagreed

Experience of Transport Focus



A desire to see and be involved in future workplans

A general confession that lack of knowledge about Transport Focus work was partly their responsibility. Some question Transport Focus's funding model and relationship with DfT but there is a clear ask (from operators) for more information about future workplans.

Future workplans:

- Whilst Transport Focus is seen as good at getting input from stakeholders, it could work harder to communicate plans
- Seeing the proposed workplans, and even having input, would help stakeholders to dovetail these with their own business and research plans and look at opportunities for collaboration





Relationship and communication with Transport Focus

The people at Transport Focus are key to building strong relationships

Leadership and local stakeholder managers help to build trust and enable Transport Focus to have an influence by getting access to decisionmakers

Approachable and friendly

Making it easy to have a two way conversation

Professional and skilled

Credible researchers

Passionate

Dedicated and committed
Stakeholder managers making great progress working in the regions helping to build trust between different organisations

Diverse team

A good mix of those with extensive transport experience and those new to the transport industry with learnings from other sectors

A call for more access to 'subject experts'

Five types of relationship

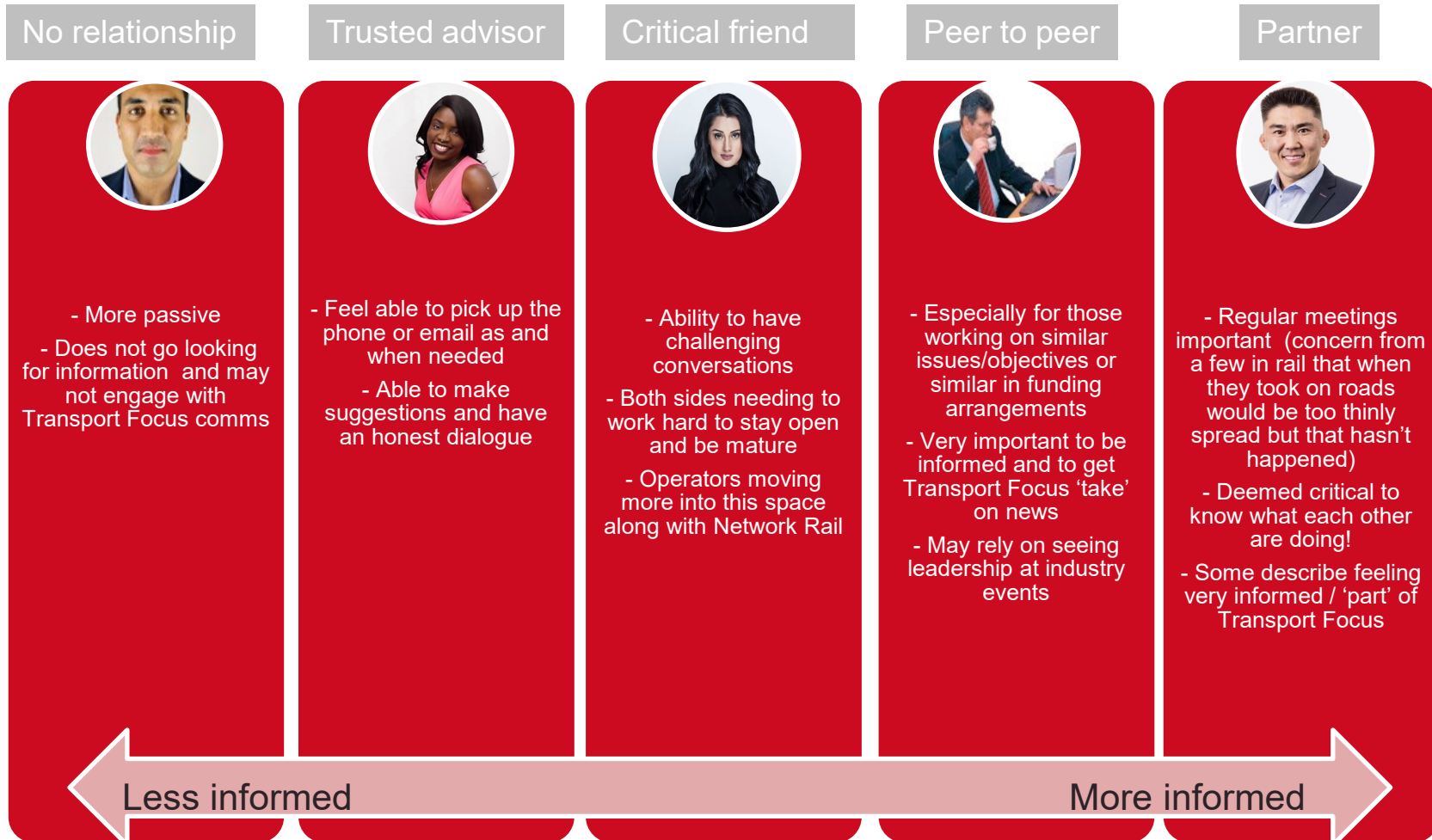
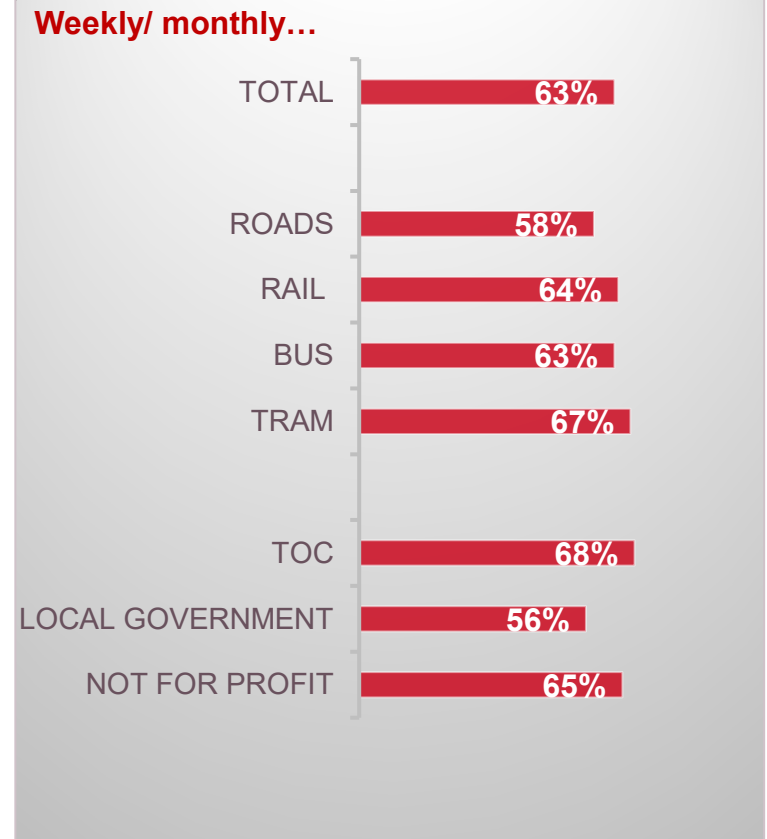
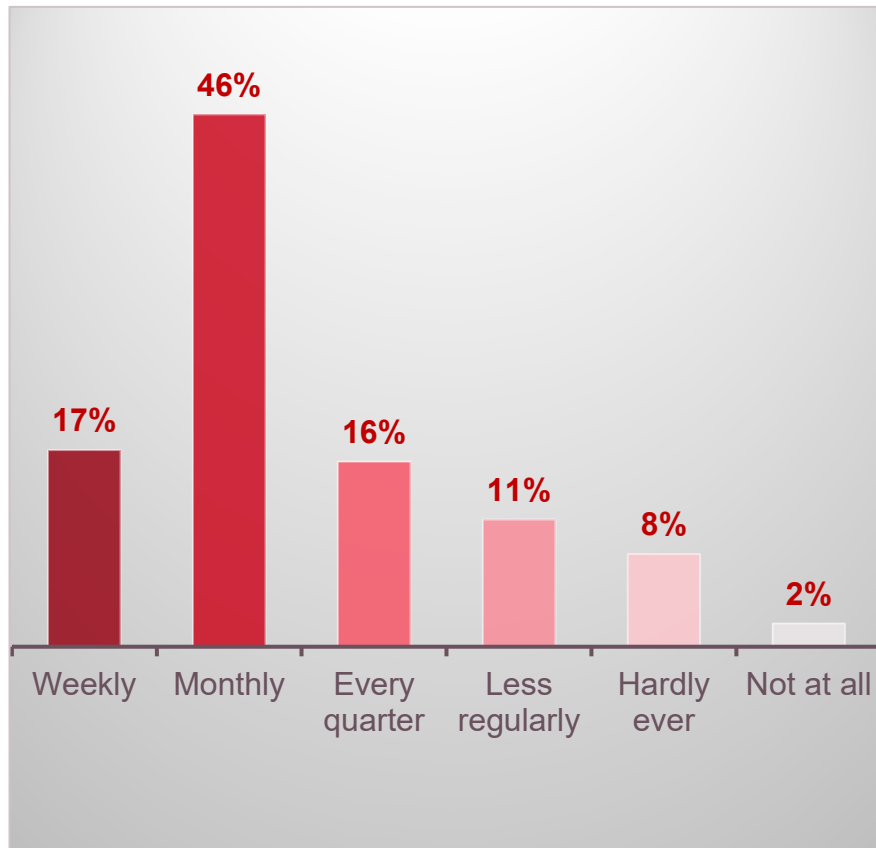


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Three in five (63%) heard from Transport Focus on a weekly or monthly basis

How frequently hear from Transport Focus

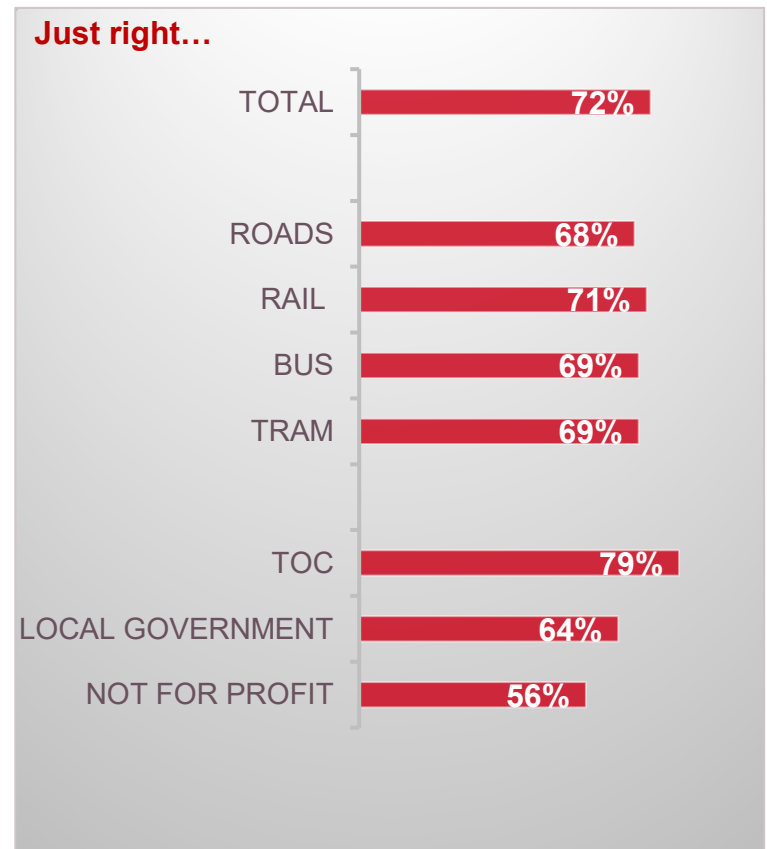
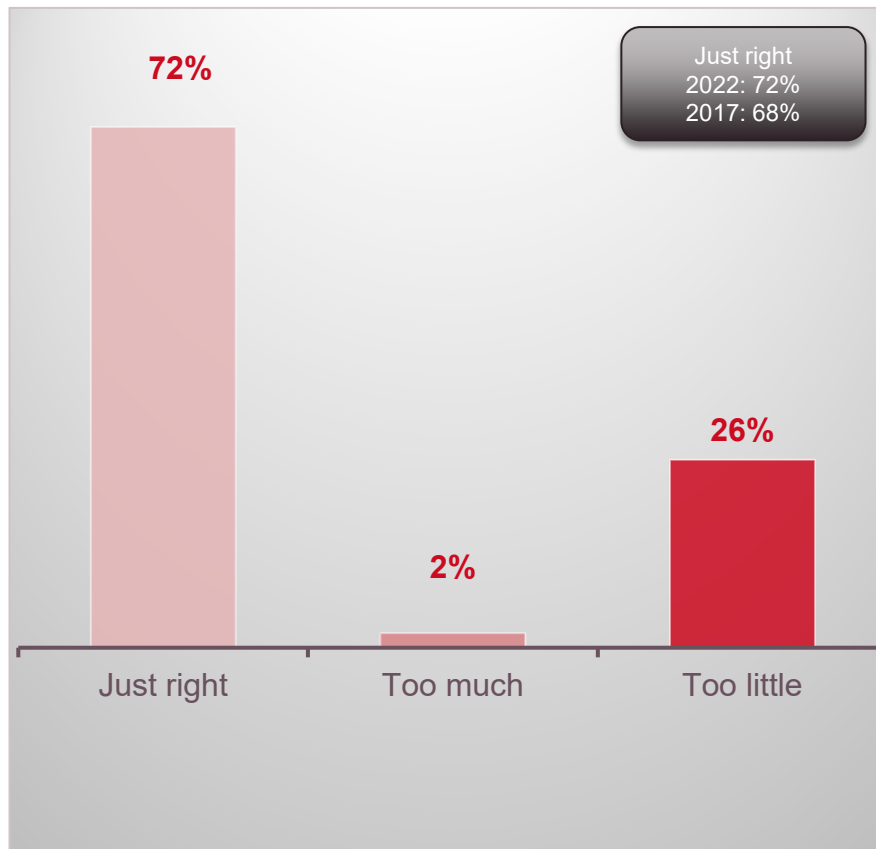


Communication about current/past work and industry news felt to be working well

- **Channel / frequency:** Aside from having face to face access to people or more frequent meetings, stakeholders were generally happy with their relationship, the type of contact they have with Transport Focus and the frequency of receiving information. However those relying on 'bumping into' Transport Focus at industry events for their news suffered a little during pandemic.
- **Content:** No strong demand for targeted communications other than bus and rail being less interested in road. All interested in decarbonisation news. Bus and rail keen for information on multi mode/integrated transport solutions but also comparisons and benchmarking of bus versus rail in terms of satisfaction.
- **Format:** Important that communications are **layered** so that senior management receive 'bite size', 'big picture' news and their 'insight' teams receive more detail and advance copies of research.
- **Timings:** TOCs welcome as much time as possible to comment on press releases ahead of publication (more than a day) and note that that has got better.

Balance of communication 'just right' for the majority of stakeholders, although 26% could have more

Level of contact with Transport Focus



A range of ways used to interact with Transport Focus

Website

- intuitive and designed to allow the user find detail /access reports
- used often to look for data to quote in a briefing, paper or talk
- a portal for thought leadership



Newsletter

- not all sure if received
- deemed informative way to receive industry news
- monthly appropriate
- liked for 'big picture' and 'bite sized'



Email – ad hoc

- works as a signpost
- allows for dialogue
- targeted to business
- main way of receiving reports directly



In person/ telephone/ online

- main contact
- in depth and personal so good for building relationship
- allows for dialogue
- works well as a signpost



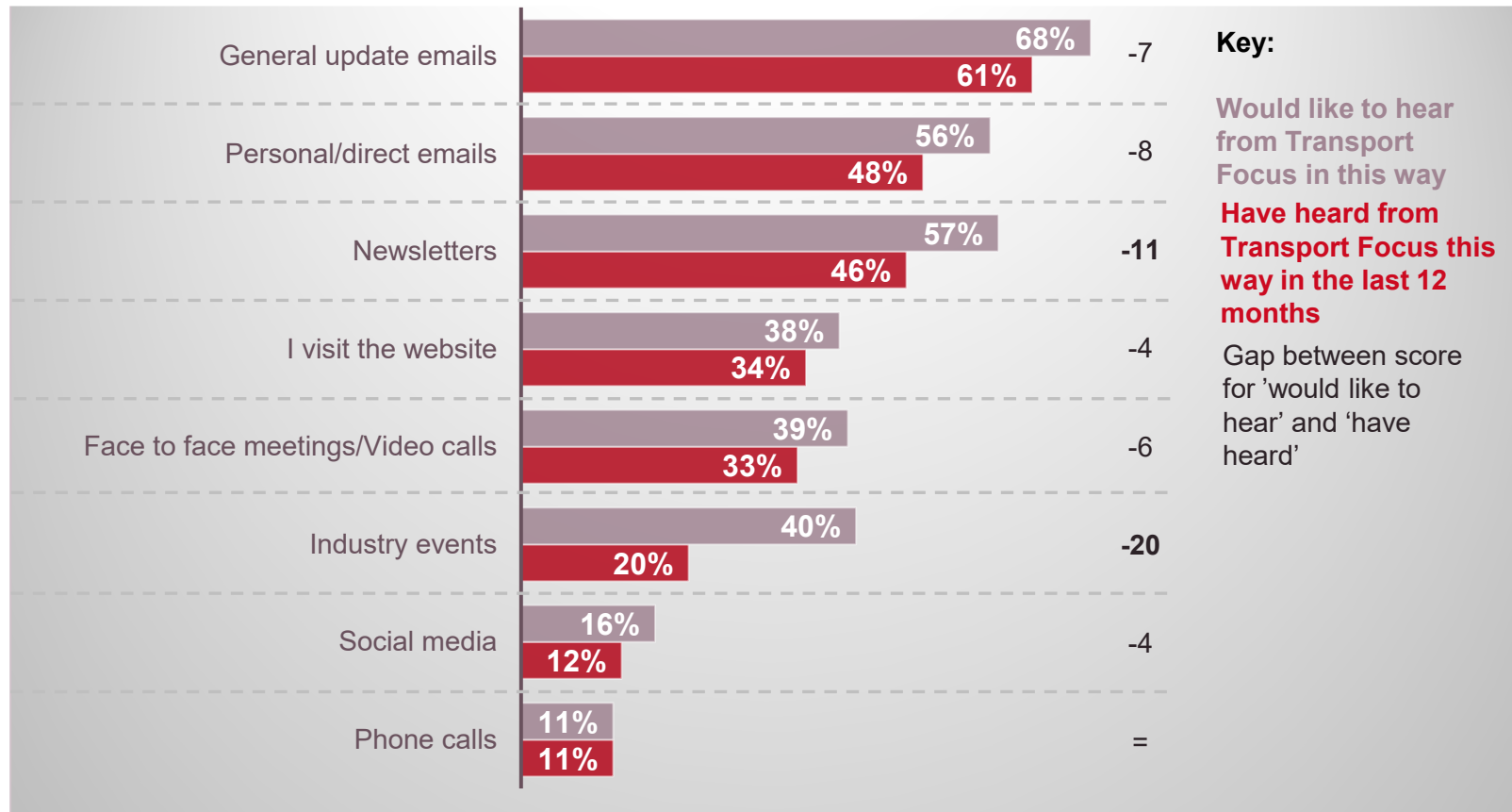
Social media

- used least often /few relying on social media for their information
- those using can see that Transport Focus is active on Twitter
- can be a good signpost



'General update' emails were most common interaction (61%), followed by personal emails & newsletters (48%, 46%)

How heard from Transport Focus/ would like to hear



TOCs most likely to receive a personal/direct email. Not for profit most likely to have received a general update

Ways in which have heard from Transport Focus in last year

	All	Roads	Rail	Bus	Tram	TOC	LA	Not for profit
Personal/direct emails	48%	47 %	49 %	48 %	50 %	63 %	40 %	38 %
Face to face meetings/Video calls	33%	31 %	31 %	31 %	22 %	44 %	28 %	25 %
Industry events	20%	21 %	24 %	20 %	18 %	30 %	23 %	13 %
Phone calls	11%	6 %	13 %	5 %	3 %	21 %	3 %	6 %
Newsletters	46%	43 %	46 %	47 %	49 %	56 %	45 %	52 %
General update emails	61%	61 %	60 %	61 %	61 %	51 %	60 %	71 %
Social media	12%	11 %	11 %	13 %	14 %	11 %	6 %	17 %
I visit the website	34%	38 %	35 %	38 %	46 %	29 %	35 %	31 %
None of the above	5%	7 %	2 %	5 %	0 %	2 %	8 %	4 %

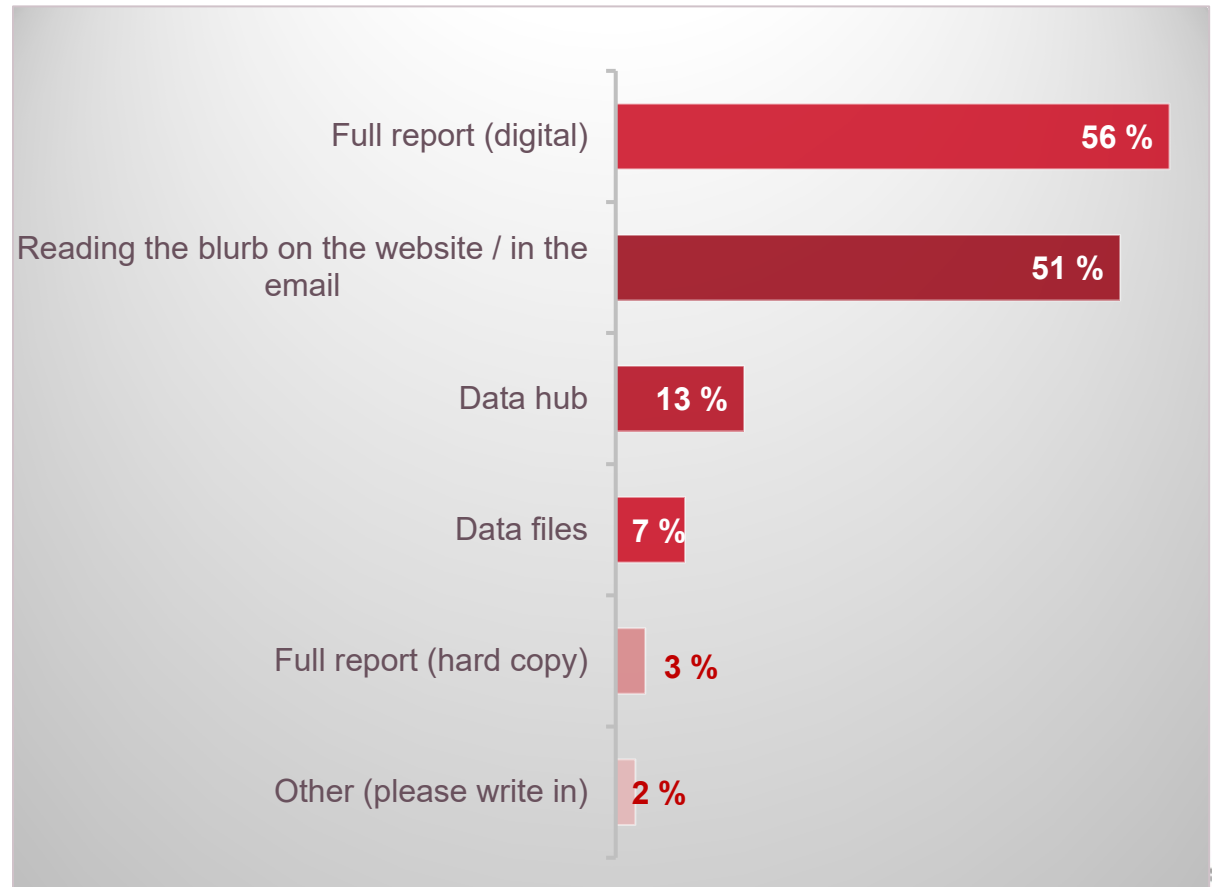
TOCs were higher for more personal types of contact (e.g. phone calls). And lower for more general updates versus other modes. 'Not for profit' higher for social media and 'general update' emails

Reading reports or 'blurb' around research was the most likely way to access research

How access Transport Focus research

81% access research

Roads: 80%
Rail: 83%
Bus: 79%
Tram: 85%
TOC: 79%
LA: 73%





Perceptions of Transport Focus

Stakeholder descriptions of Transport Focus point to its unique position to drive improvements

Understanding customer needs



Helping to drive improvements



Understanding the industry

Understanding what the customer wants

Its role is an independent consumer watchdog (a 'gentle' watchdog)

Remit is to be the voice of the customer

Using evidence to work on behalf of transport users and help inform the debate

It holds train operators and Network Rail to account

A force for good

An independent critical friend

A trusted adviser to the industry

Helping to inform strategy/design services

Strengths for Transport Focus included comms, research, relevance and relationships

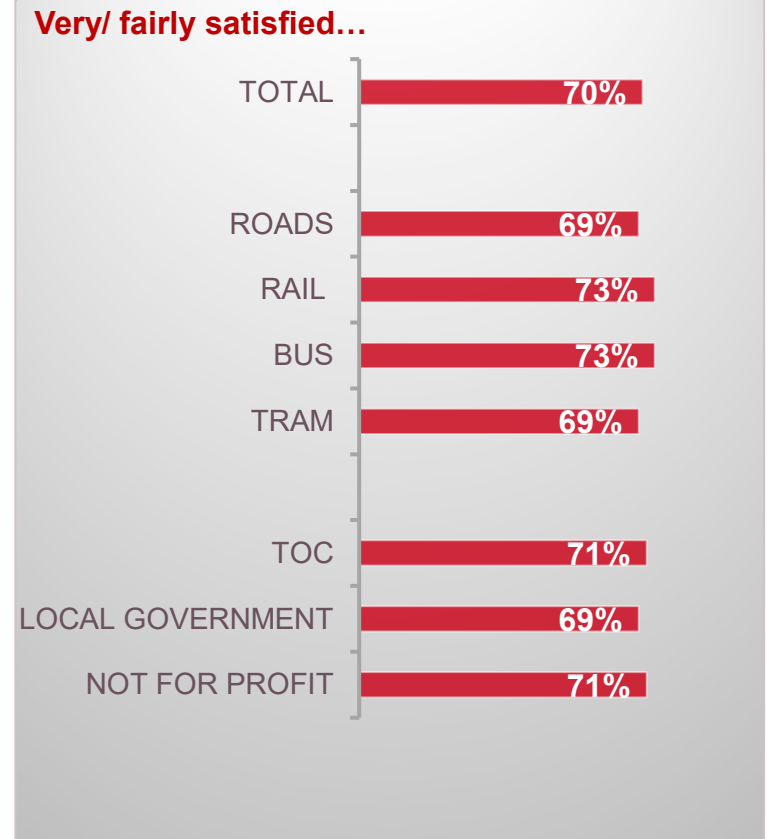
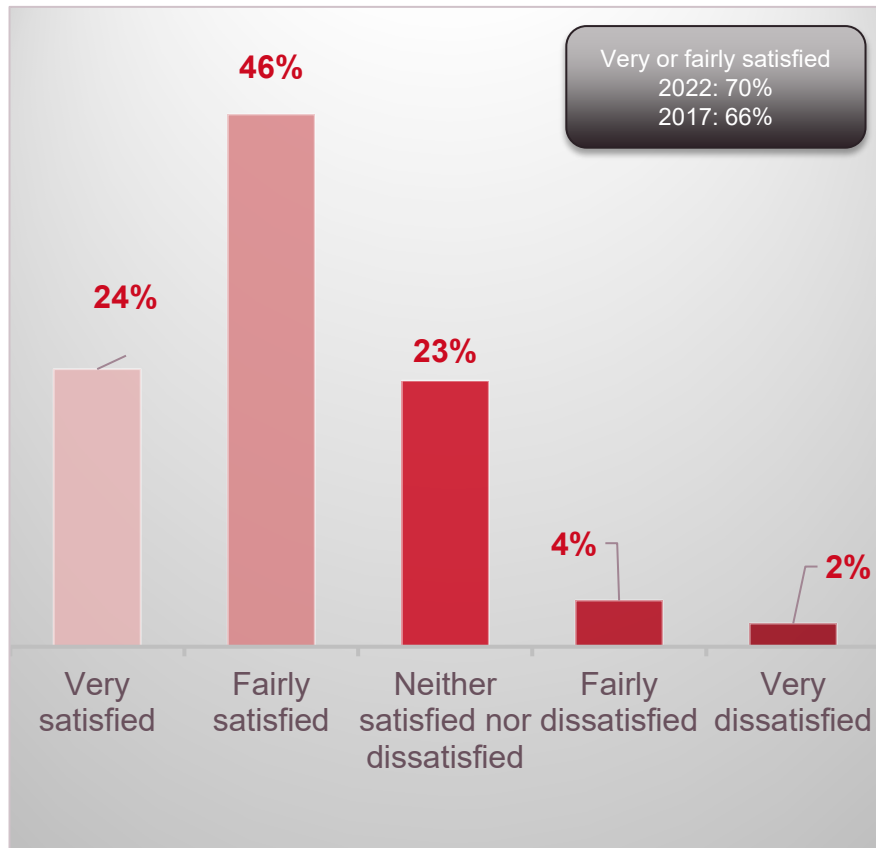
<p>Staff and relationships (esp. leadership and local stakeholder managers) ✓</p>	<p><i>Positive, responsive, constructive, collaborative, useful, pleasant, sensible, knowledgeable, proactive, open, critical friend, supportive, helpful, credible, approachable, reliable, mature, trustworthy, professional</i></p>
<p>Research and reports (insight and understanding about the industry) ✓</p>	<p><i>Evidence based, comprehensive, insightful, objective, thoughtful, data driven</i></p>
<p>Unique purpose and role (being independent) ✓</p>	<p><i>Independent, unbiased, transparent, challenging, critical friend</i></p>
<p>Communication ✓</p>	<p><i>Clear, effective, concise,</i></p>
<p>Relevance – focus/activities (especially work around covid) ✓</p>	<p><i>Focused, user focused, productive</i> <i>'The work on the pandemic demonstrated its value.'</i></p>



Satisfaction with Transport Focus

7 in 10 stakeholder participants were satisfied with Transport Focus and expressed dissatisfaction was low

Overall satisfaction with Transport Focus



Some respondents selecting 'neither' did not feel sufficiently aware of the work of Transport Focus to be able to comment in a positive or negative way, but not all

Is Transport Focus useful?

yes

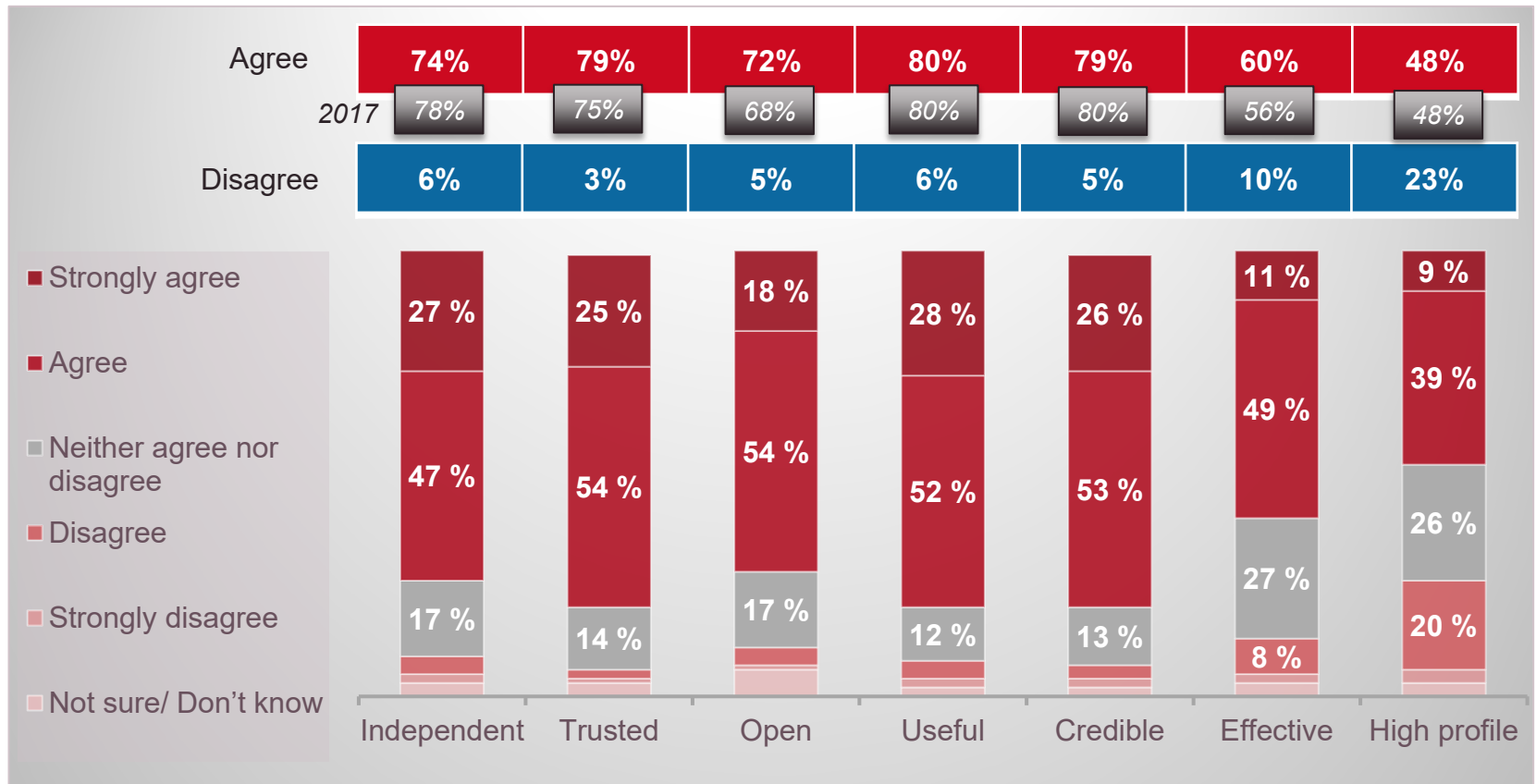
- **Existence:** There must be a watchdog for the user
- **Relationship building:** especially local stakeholder managers that are forging collaboration between organisations
- **Insight:** Commissioning relevant research especially during Covid when reporting became more agile and timely
- **Dialogue and collaboration:** Having passenger surveys being presented in person allowing for Q&A
- **Sharing best practice**
- **Collating industry news**
- **Influencing** decision making, service design and policy (DfT)

- **NRPS a blunt instrument:** dated, irrelevant and unrepresentative (hope that reporting will be more timely and some aware of merging with 'wavelength')
- **Thought leadership:** question if it has the skill set. Need to consolidate learnings and ensure no duplication, share best practice more (esp. around cost savings)
- **More consultancy role** needed
- **More ownership / accountability:** to create action plans not just for operators but also central and local government (for example, holding local authorities to account where bus stops are not meeting passengers needs)

no

8 in 10 thought Transport Focus to be 'useful' and 'trusted'. Half agreed that Transport Focus was 'high profile'

Attitudes to Transport Focus



Is Transport Focus influential?

yes

- **Presence:** Even if not easy to cite its achievements, it's enough that it has a consistent ongoing presence in getting decisionmakers to consider the user perspective (nationally and locally via stakeholder managers)
- **The right balance:** Whilst certain stakeholders want Transport Focus to be noisier, the majority felt it struck a good balance between campaigning and being understanding of the limitations of the transport industry
- **A catalyst:** Transport Focus produces the work for others to lobby

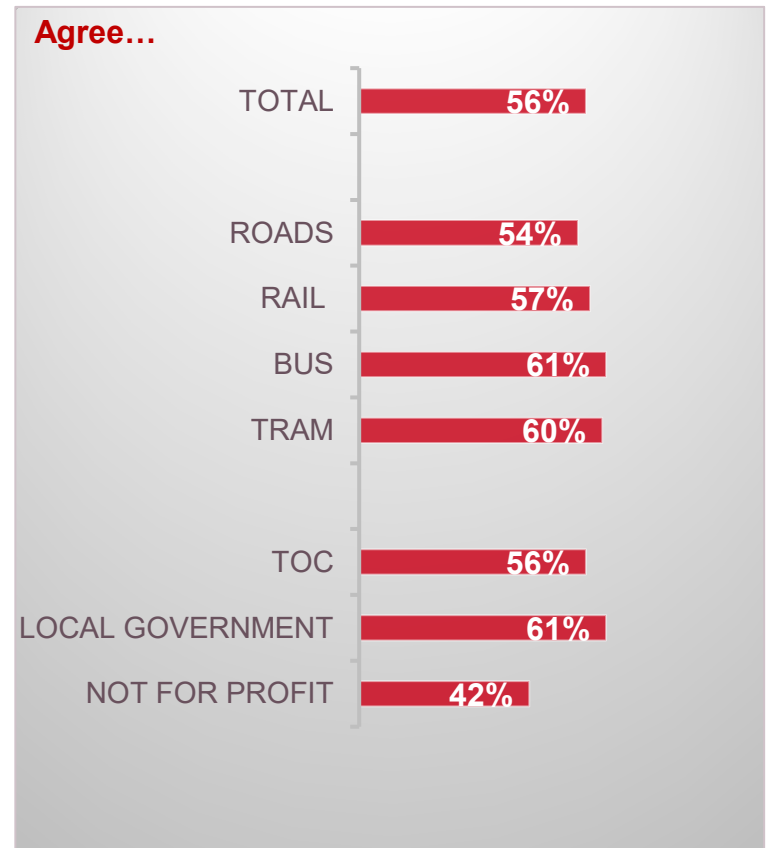
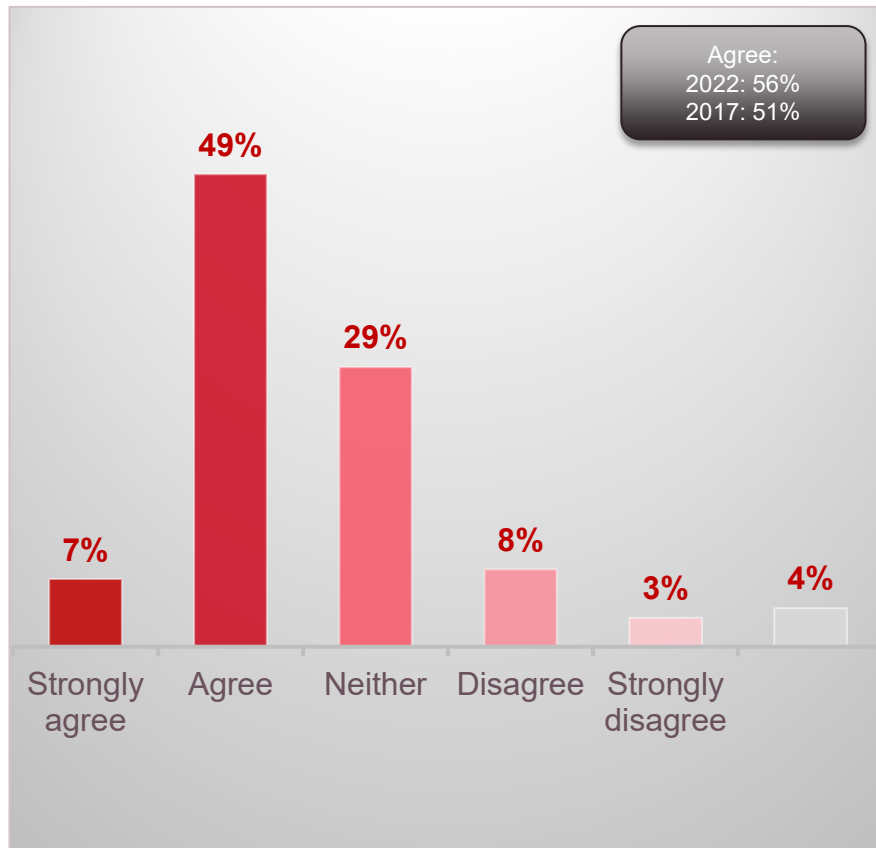
- **Unknown to the public:** need to be a beacon for passengers to complain. Majority reasoned that they can still advocate for the general public without being known
- **Scale of ambition/others more influential** and seen to be lobbying gov. more such as CPT
- **Limited by resource**
- **Political constraints:** Whilst perceived as being independent (especially compared to those funded entirely by operators) some still felt that the funding model may restrict ability to challenge gov. sufficiently

no

NB. Operators wary of Transport Focus being too 'crusading' but acknowledged as moving more into a critical friend role

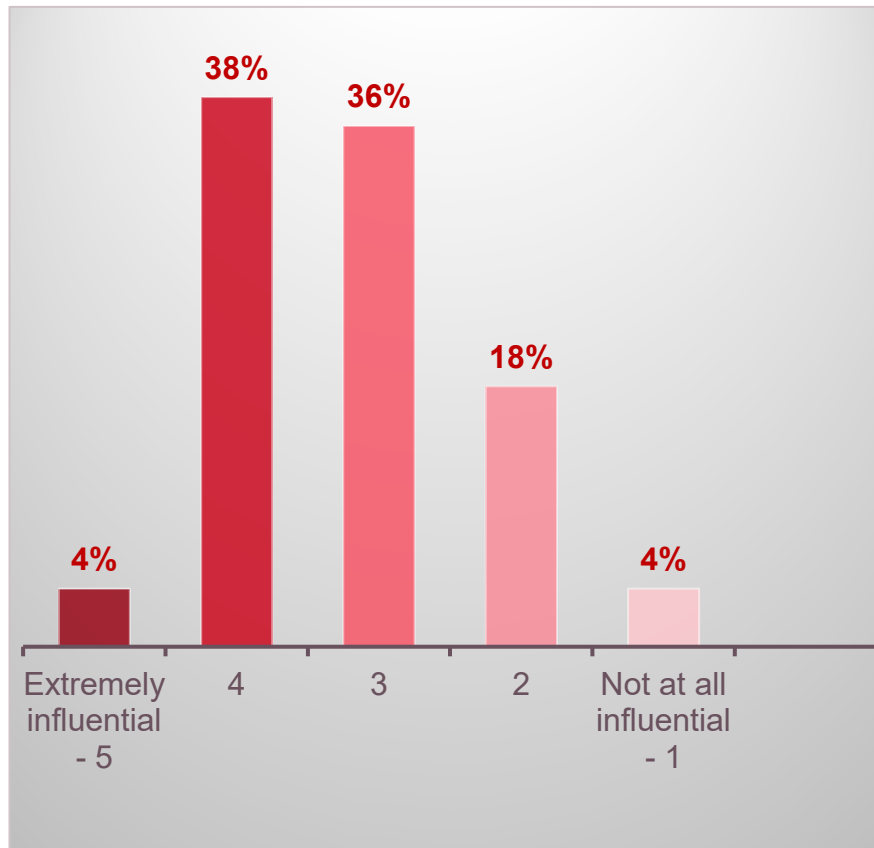
Over half thought Transport Focus had been effective in key areas for their organisation. A minority disagreed (1 in 10)

Extent Transport Focus effective in key areas for organisation

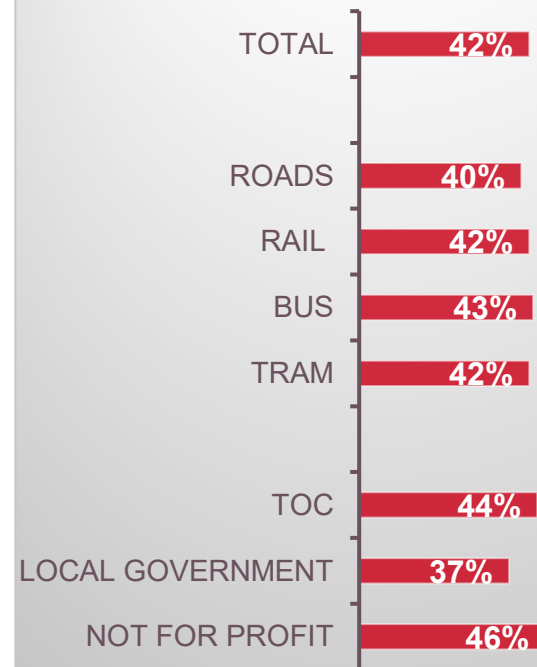


Two in five said Transport Focus is an extremely or very 'influential' organisation – few thought there was no influence

Perceived influence of Transport Focus (overall)

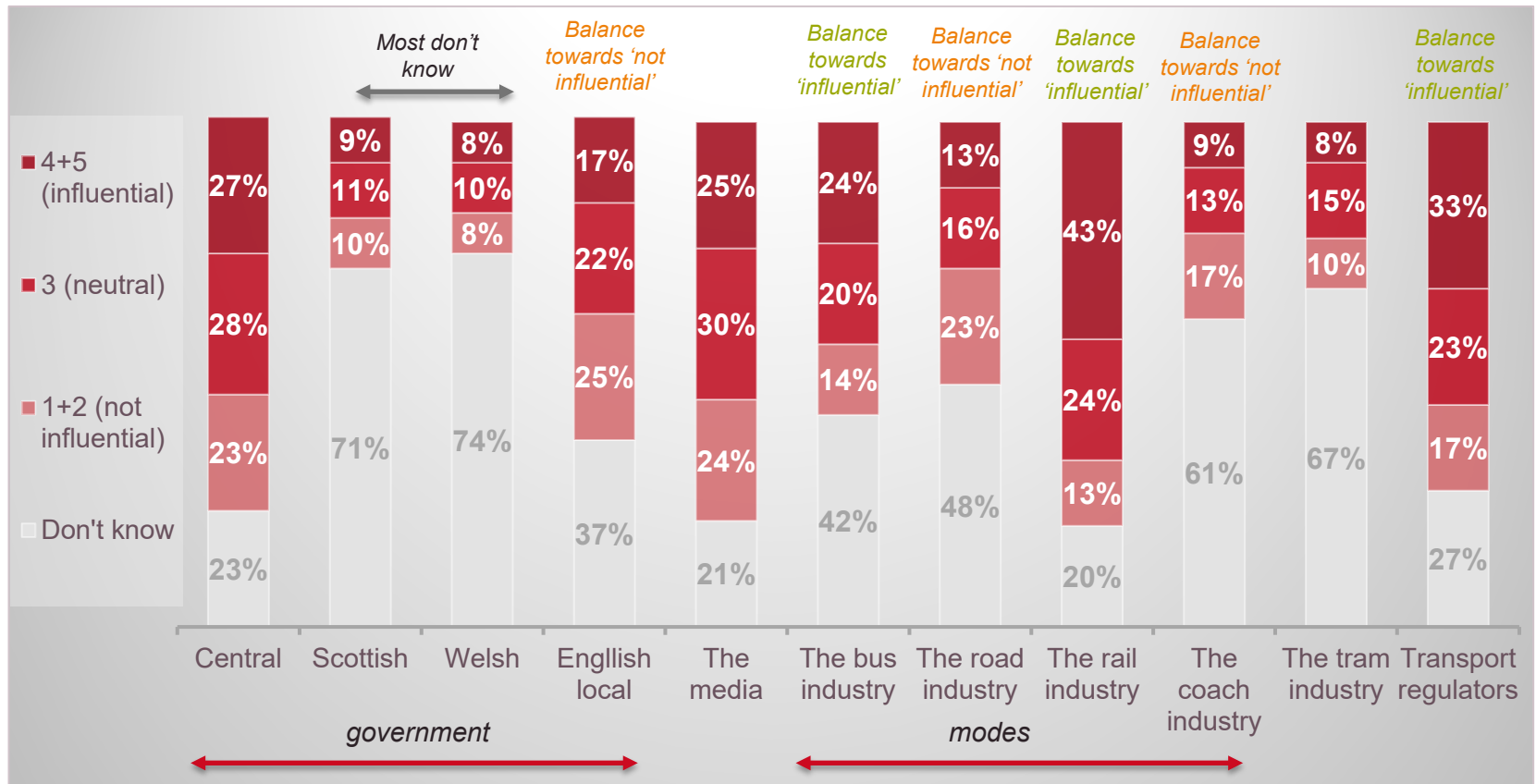


Score of 4 or 5...



The rail industry is where Transport Focus perceived influence is highest

Perceived influence of Transport Focus



Highest perceived level of influence is in regards to the rail industry at 43% rising to 48% of stakeholders from rail

% consider Transport Focus 'influential in each area by mode and organization type	Roads	Rail	Bus	Tram	TOC	LA	NFP*	
Central government	27%	28	26	29	28	25	30	27
Scottish government	9%	7	9	9	12	15	4	10
Welsh government	8%	8	9	10	13	11	4	8
English local government	17%	18	18	23	20	15	28	19
The media	25%	25	26	28	36	21	22	33
The bus industry	23%	25	21	39	31	3	40	25
The road industry	14%	23	7	10	10	2	10	17
The rail industry	43%	36	48	42	39	49	41	43
The coach industry	9%	9	8	12	9	5	13	8
The tram industry	8%	8	7	10	14	8	12	15
Regulators	33%	35	32	32	34	32	34	31

4.1b Please rate how influential you think Transport Focus is with each of the following organisations (where 1 is not at all, 5 is extremely influential).

Base: All respondents: 378/ Roads: 167/ Rail: 264/ Bus: 176/ Tram: 72/ TOC: 63/ Local government: 78, Not for profit: 48*



Views on Transport Focus activities

Is Transport Focus focusing on the right areas?

Lots of opinion on what Transport Focus SHOULD be focusing on in 2022 and beyond....!

✓ Support during Covid

- **Ad hoc insight during last 2 years hugely valuable** (depth and speed of insight)
- Transport Focus managed to maintain and build on relationships despite the lack of in person contact

? Accessibility

- **Mixed views / awareness as to whether Transport Focus is focusing on this**
- Some question whether this is valuable - operators have panels they use for research/co-creation and producing work that they think is superior
- Risk of overfocusing at the expense of other passengers

✓ Sustainability

- **Generally not known to be doing much in this space**
- Those working closely with the green agenda have more awareness of Transport Focus's work and valued the research on EVs
- All felt that it should be doing more in this area even though it's not a strong area of concern for passengers yet
- Financial sustainability also important

✓ User /'passenger' led

- Many stakeholders perceive Transport Focus to be 'passenger' led. This means **working on areas that are important to existing passengers**
- Mixed view as to whether this is right (esp. rail/bus where need is seen to be attracting non-users)
- Road stakeholders cite examples of positive and 'authentic' user-led focus on motorway service stations

'Accessibility' thought to be the right area to focus on for 91% - more than for bus passenger experience

Whether area of work is 'right' to focus on

(% agree with each)



‘Accessibility’ has a strong fit across all modes. There are knowledge gaps on work Transport Focus does for their mode, particularly roads, bus and tram

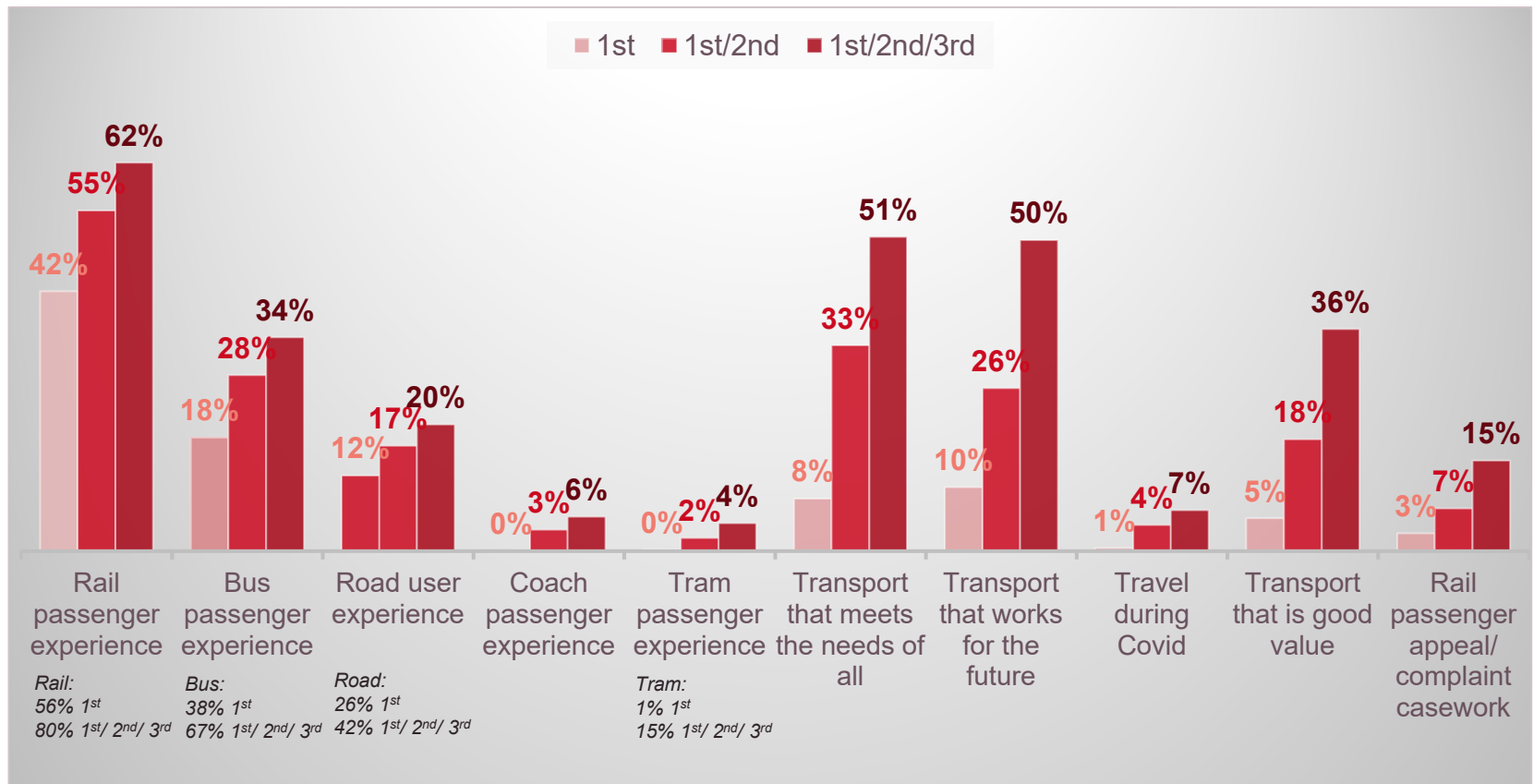
Knowledge and perceived fit of areas of work for Transport Focus

	Total		Roads		Rail		Bus		Tram	
%	K	F	K	F	K	F	K	F	K	F
Rail passenger experience	59	89	46	86	72	91	56	86	64	87
Travel during covid	49	64	40	60	50	67	55	67	63	71
Rail passenger/ complaint casework	47	74	31	66	55	77	45	74	53	72
Transport that meets the needs of all (accessibility)	41	91	33	90	43	91	45	89	41	85
Bus passenger experience	36	78	42	80	35	78	62	89	52	86
Making transport better value for money	28	80	24	78	30	80	32	82	39	80
Road user experience	24	54	43	70	15	51	21	50	24	55
Transport that works for the future (sustainability)	23	80	21	78	23	81	26	83	25	78
Tram passenger experience	15	66	16	68	17	67	23	68	32	80
Coach passenger experience	11	63	12	64	9	64	17	65	19	70

K=knowledge score of 4 or 5 about work Transport Focus does, F=agree ‘fit’ with Transport Focus

Accessibility and sustainability are top priorities for half of stakeholder participants

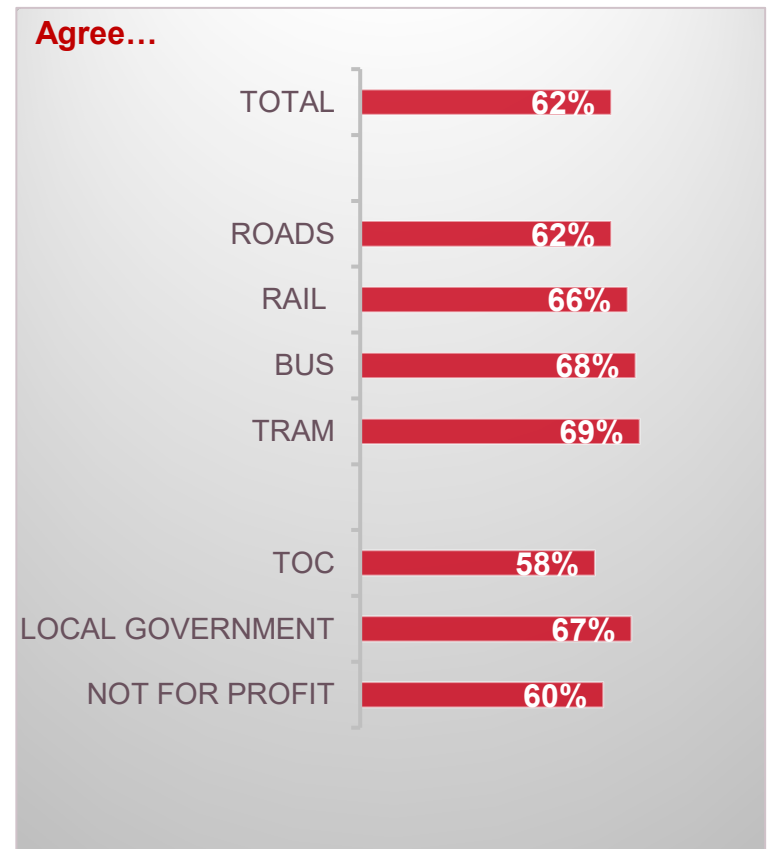
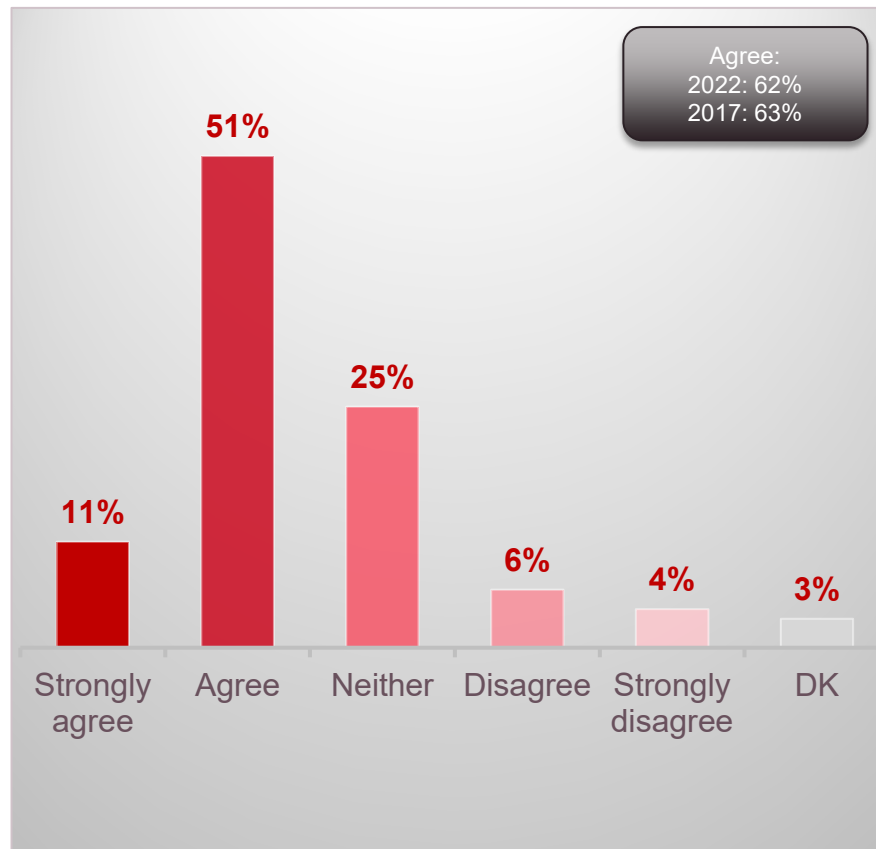
Most important areas for organisation



Figures below bars for 'rail', 'bus', 'road' and 'tram' are the responses of stakeholders whose organisation involves that mode

6 in 10 agreed that Transport Focus concentrates on the right areas. A minority disagreed (1 in 10)

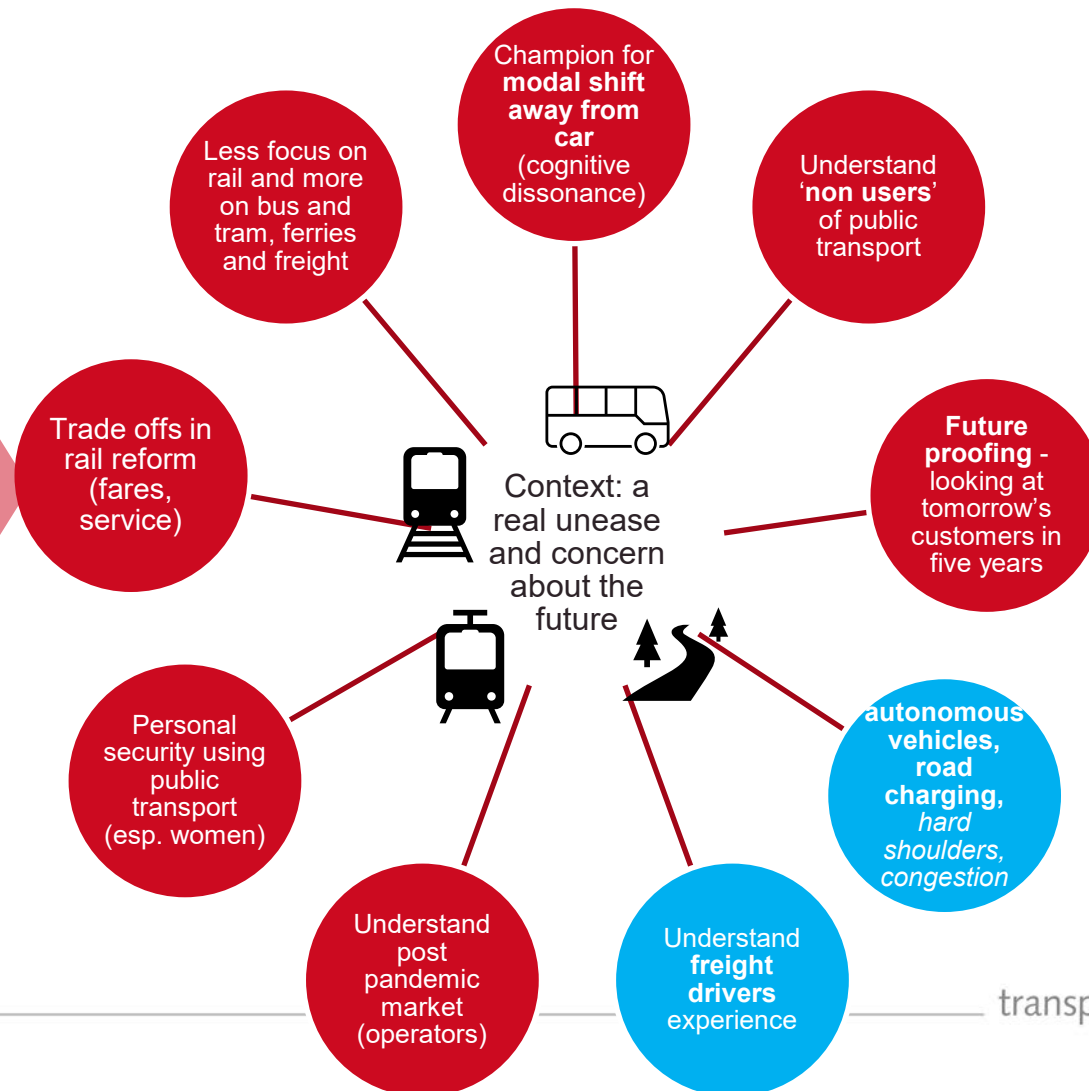
Extent Transport Focus concentrates on right areas



Direction of Transport Focus was something that many stakeholders took the opportunity to comment on

What do stakeholders want Transport Focus to be doing in 2022 and beyond?

A strong call for someone like Transport Focus with 'moral authority' to lead on these issues



Background and sample profile

- Transport Focus wished to understand how stakeholders viewed it as an organisation. Research was commissioned with a mix of stakeholders (mode, geography and position) from February to April 2022. This included:
 - an online survey with 378 responses
 - depth interviews with 20 with ‘key’ stakeholders

Where organisation operates

