



## **Spotlight**

How to capture in-the-moment rail experiences

March 2020

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## Why Spotlight?

The National Rail Passenger Survey (NRPS) is a robust, representative and comprehensive resource of rail passenger experiences. However, it does have constraints as it only covers journeys over a portion of the year and can be slow to deliver results.

Transport Focus is currently running a programme of work to trial different ways of complementing and enhancing NRPS. Some of these trials have been successful and some less so, but all have produced valuable learnings that we can apply to our future work.

Spotlight was part of this research. There was a desire within the organisation and wider industry to trial a way of capturing rail journey experiences using a method that:

- is quick and in-the moment
- is relatively robust, but not at the expense of speed
- provides accessible data quickly
- complements the National Rail Passenger Survey
- could be scaled up to include other transport modes.

## What we found

We set out to understand if there was a quicker and cheaper way to collect rail journey experiences. The Spotlight trial demonstrated that there is no simple answer to this and the methods we already use for the National Rail Passenger Survey are the most reliable and representative. While there are quicker and cheaper methods out there, they are not as robust and are potentially not sustainable over a longer period. We found:

- given the short questionnaire length, Spotlight generates a lot less insight than the NRPS
- it relies on going back to the same people to get sufficient numbers
- the parts of the trial that did work are not as in-the-moment as first hoped and rely on recalling recent journeys.

However, Spotlight has demonstrated that there are ways we can improve and make better use of the great resource we have in the NRPS. We will use what we have learnt in the pilot to enhance our existing resource and get more out of it, such as implementing the following:

- sending out online follow-up surveys to understand stories and details behind NRPS responses
- using artificial intelligence (AI) to analyse open-text comments.

## What we did

### Recruitment

We asked research agencies to come up with innovative but efficient ways of speaking to passengers. We selected the best of these ideas and set out to trial six different methods of recruitment:

**Pilot 1:** face to face interviewers located in stations

**Pilot 2:** face to face interviewers on trains (partnering with Northern and Great Western Railway)

**Pilot 3:** online survey to fresh Transport User Panel members

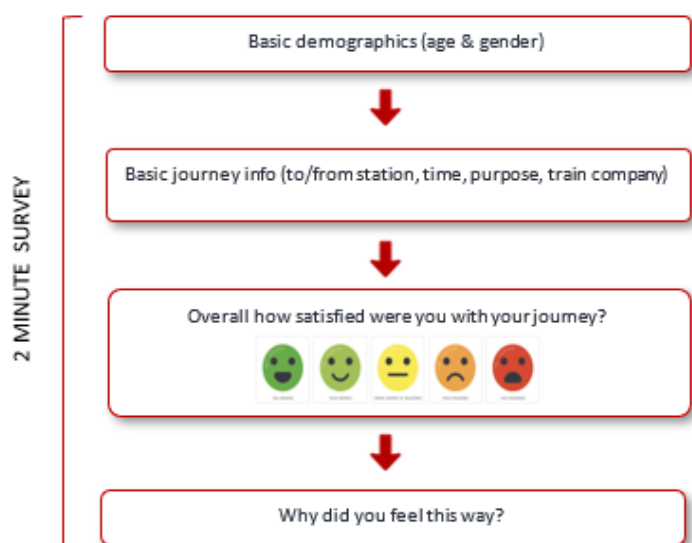
**Pilot 4:** online survey activated by on-train Wi-Fi (did not go live)

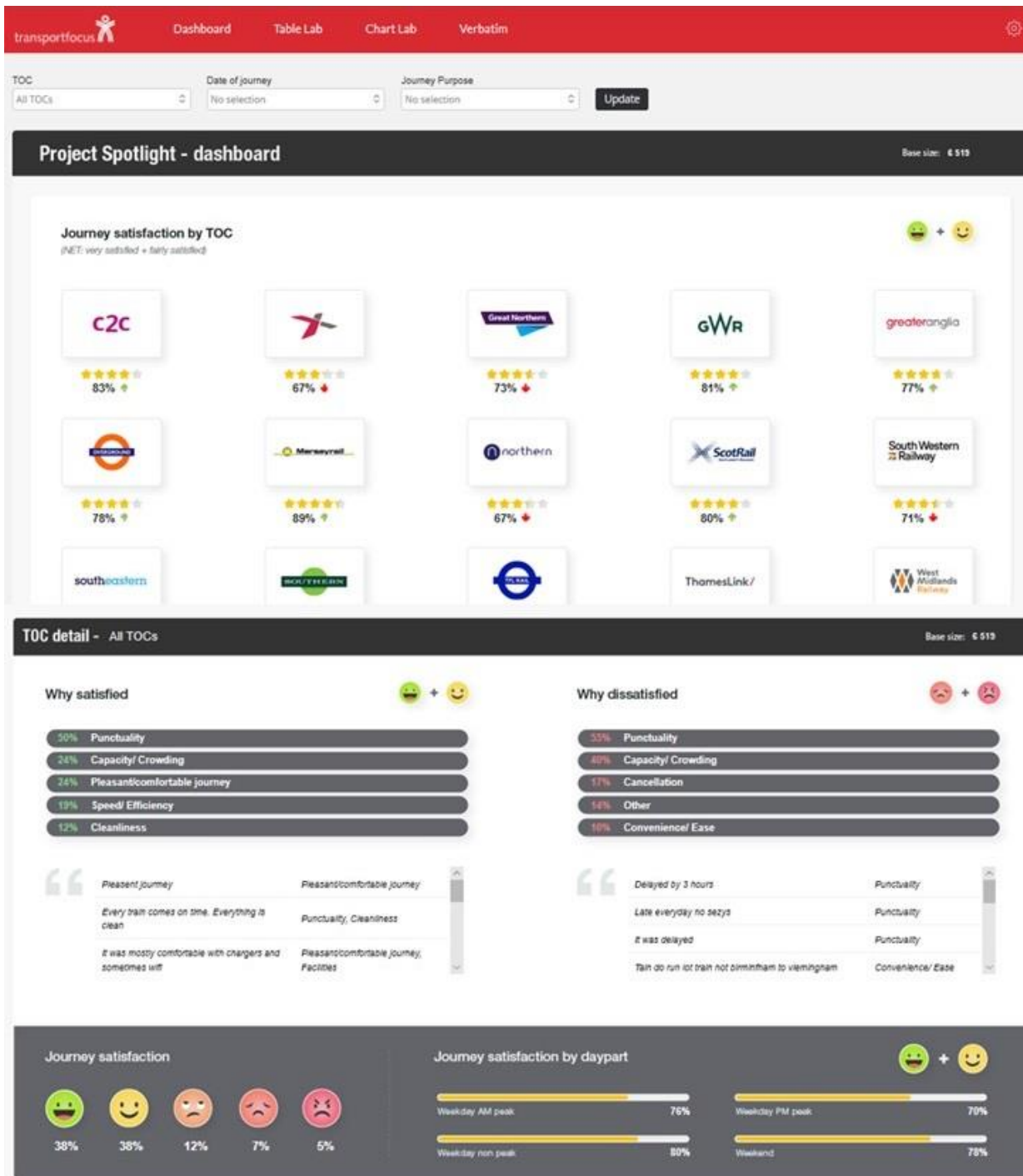
**Pilot 5:** daily omnibus sample (nationally representative online by collecting data on a wide variety of subjects during the same interview)

**Pilot 6:** ad hoc online panellists.

### Questionnaire

The idea of the pilot was to go back to people once we had recruited them, given that recruiting individuals is the costliest aspect of the research. Passengers were recruited through one of the above five methods that went live, asked to fill out an initial questionnaire and then re-contacted to complete regular 'diary' entries when they had made a journey.





The questionnaire itself was kept very short to meet the objectives and used emojis in the satisfaction question to keep participants engaged.

### Text analytics

We used text analytics to examine the open responses to the final question 'Why do you feel this way?' This was an automated process that used AI to code the comments in terms of their theme and sentiment, which then fed automatically into the dashboard.

## Output

We built an example of an interactive dashboard that would allow stakeholders to view and track the rail journeys in near real-time.

## What we found

RECRUITMENT		PILOT 1 Face to face in station	PILOT 2 Face to face on train	PILOT 3 NRPS re- contact	PILOT 5 Omnibus sample	PILOT 6 Ad hoc online panellists
	Number of people recruited	204	252	(1749 emails sent) 326 (19%)	(2000 Nat Rep*) 320 past week (16%)	128
	Number of emails shared	92 (45%)	103 (41%)	253 (78%)	235 (73%)	100 (78%)

ONLINE DIARY	Diary length	5 weeks	3 weeks	5 weeks	5 weeks	5 weeks
	Number of people completing online diary any week	12 (9%)	33 (32%)	185 (73%)	191 (81%)	80 (80%)
	Total number of journeys collected	27	66	735	2195	856
	Average numbers of journeys per active person per week	1.4	1.4	1.5	3.1	3.1

\*Nationally representative

### Pilots 1 and 2

These were interviewer-led methods and achieved a low response rate in both the initial recruitment and diary stages. This means they are not viable methods to scale up, given we would be looking at tracking journeys continuously throughout the year.

### Pilot 3

The NRPS recontact panel showed a relatively high participation rate for both recruitment and diary surveys, which aligns to the response rates we see on our Transport User Panel. However, the demographic profile of these respondents is considerably older. So, while this sample is a great resource for travel-related research, its suitability for a study that looks to measure experiences across the industry and complement NRPS is debatable.

### Pilot 4

We did not manage to go live with the on-train Wi-Fi survey due to operational constraints. This is a worthwhile learning as it reflects the potential difficulty of scaling this method across the industry. Please note this is why pilot 4 is not shown in the tables above and below.

## Pilots 5 and 6

The daily omnibus sample and direct recruitment approaches provided the highest volume of diary entries and this was maintained across the weeks. While they produced good numbers, the panel is a limited pool of people that we would be going back to regularly and panel members are not necessarily representative of the average rail passenger.

### Summary of pilot performance

	PILOT 1 Face to face in station	PILOT 2 Face to face on train	PILOT 3 NRPS recontact	PILOT 5 Omnibus sample	PILOT 6 Ad hoc online panellists
Strengths	<ul style="list-style-type: none"> <li>✓ Collected most commuter journeys</li> <li>✓ Most journeys are daily</li> <li>✓ Good spread of age</li> <li>✓ Overall satisfaction is similar to NRPS</li> </ul>	<ul style="list-style-type: none"> <li>✓ Most journeys are daily</li> <li>✓ Good spread of age</li> <li>✓ Overall satisfaction is similar to NRPS</li> </ul>	<ul style="list-style-type: none"> <li>✓ High email conversion rate, low week on week attrition</li> <li>✓ Good mix of daily journeys</li> <li>✓ Good spread of age and recent travel</li> <li>✓ Collect more Weekday PM peak journeys</li> <li>✓ Cheaper sample</li> </ul>	<ul style="list-style-type: none"> <li>✓ High email conversion rate, low week on week attrition</li> <li>✓ Most journeys are daily</li> <li>✓ Good spread of age and recent travel</li> <li>✓ Collect more Weekday PM peak journeys</li> <li>✓ Overall satisfaction is similar to NRPS</li> </ul>	<ul style="list-style-type: none"> <li>✓ High email conversion rate, low week on week attrition</li> <li>✓ Most journeys are daily</li> <li>✓ Good spread of age and recent travel</li> <li>✓ Collect more Weekday PM peak journeys</li> <li>✓ Overall satisfaction is similar to NRPS</li> </ul>
Weaknes	<ul style="list-style-type: none"> <li>✗ Low diary participation</li> <li>✗ Very high attrition between recruitment and the diary stage</li> <li>✗ Costly sample collection</li> </ul>	<ul style="list-style-type: none"> <li>✗ More leisure trips</li> <li>✗ Low diary participation</li> <li>✗ Very high attrition between recruitment and the diary stage</li> <li>✗ Costly sample collection</li> <li>✗ Careful route planning so not to skew TOCs</li> </ul>	<ul style="list-style-type: none"> <li>✗ Considerably older sample</li> <li>✗ More negative about their journeys rail journeys</li> </ul>	<ul style="list-style-type: none"> <li>✗ Not an infinite supply of sample</li> </ul>	<ul style="list-style-type: none"> <li>✗ Not an infinite supply of sample</li> <li>✗ Smaller sample so need to target specific TOCs</li> </ul>



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