

Shaping Rail's Future: Customer Community

Report: July 2023

**Contact Centre and
“remote” customer service**

Shaping Rail's Future: objectives



- ✓ Hear about rail users' – and potential users' – experiences, impressions and opinions of the railway in Britain
- ✓ Understand our strengths and weaknesses, where improvements are needed
- ✓ Involve customers in potential solutions and new ideas to help shape the future of rail

Introducing the customer community

40



Participants with a mix of:

- Reasons for using rail, and frequency
- Rail dependency
- Disabilities and not, and other needs e.g. travelling with buggies
- Demographics, lifestyles, attitudes
- Regions and urban, rural or suburban context

Names have been changed throughout this report to protect anonymity

Each month, participants complete activities and answer questions around a particular topic

Via short videos, text, images

Individually, interacting with a moderator, and/or with each other

In addition, two face to face workshops to discuss topics further, generate ideas, and feed back on proposed concepts and solutions



12 months from February 2023



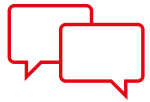
Topic focus in July 2023:

**Customer service
via contact centre /
remote resources**

In July 2023 the community...



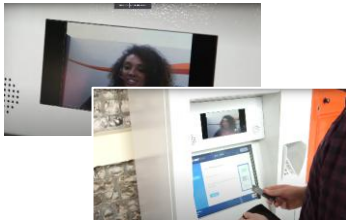
Explained their preferred ways of contacting train companies, in different circumstances



Told us about their experiences with interacting with contact centres

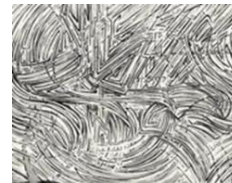


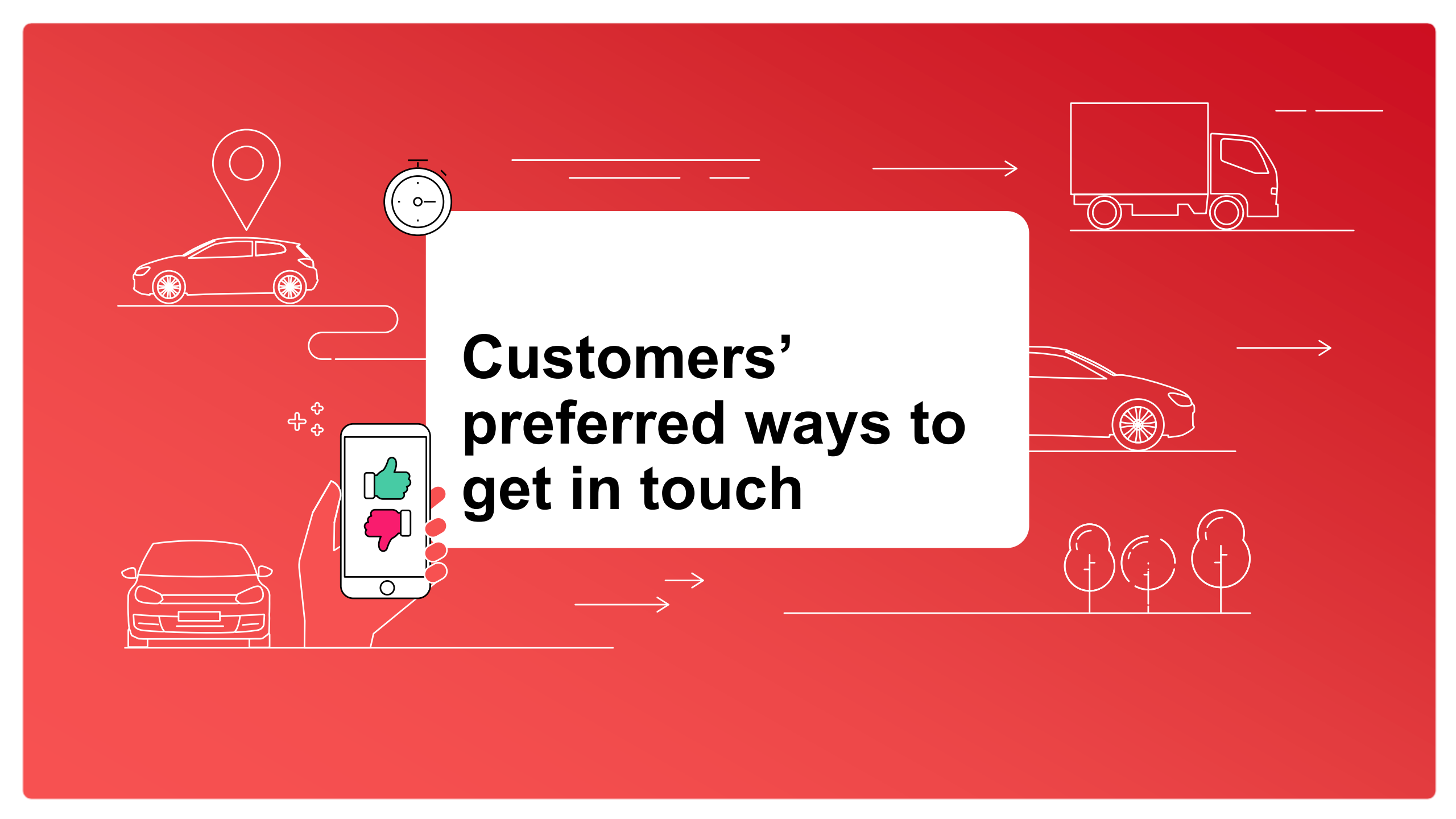
Gave their opinions on where contact centre staff are located, and use of automation



Evaluated the idea of a “video call / remote take-over” function within TVMs

(Updated us on how they feel about travelling by train generally)





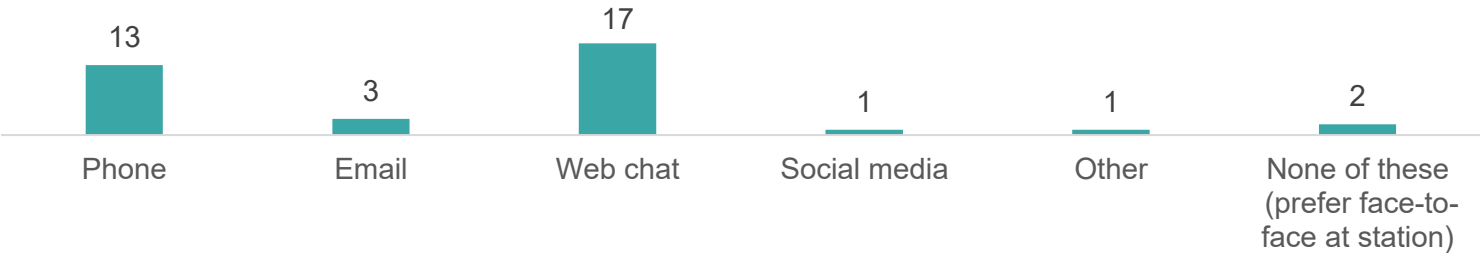
Customers' preferred ways to get in touch

Customers' preferred contact methods vary depending on the reason they are getting in touch

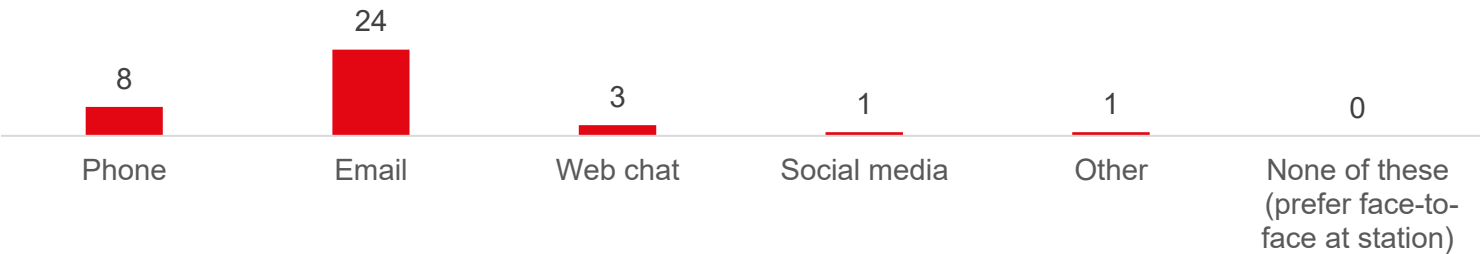
Preferred way to contact train company about a....
Other than face-to-face, and assuming information not available online, or you didn't want to / couldn't look online
Task 37



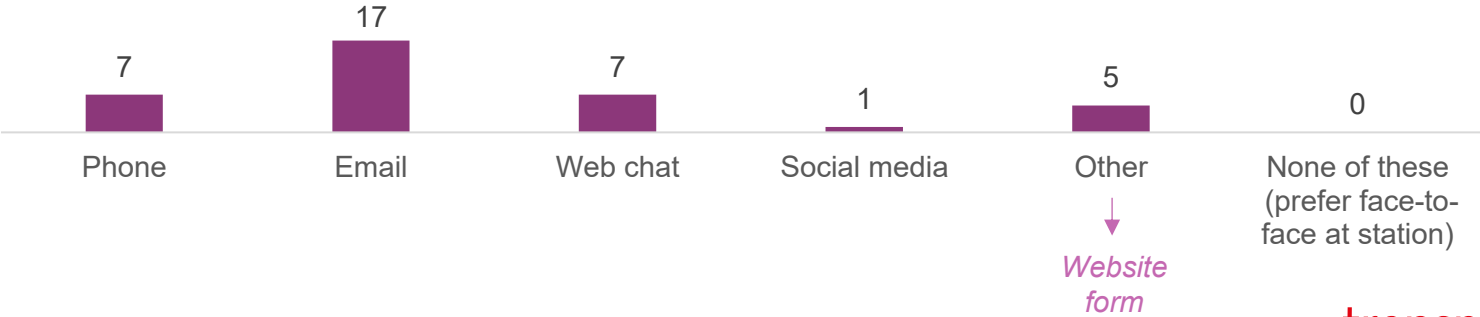
General query
*e.g. ticket restrictions,
service times*



Complaint



**Compensation /
refund**



Base: all community participants, June 2023 (37); figures shown are absolute number of people

Each method has its pros and cons, suits different scenarios and individuals, and comes with different response expectations

See appendix for more detail and customer comments about each of the methods and their benefits / drawbacks, as summarised here



Phone

- ✓ Potential for efficiency because it allows for two-way dialogue, therefore useful for **where reason for contact is either more urgent, complex or serious** and merits explanation, discussion or acknowledgement
- ↔ Valuable for **human touch, against which response is expected to deliver well**
- ✗ Potential for long wait times, and some risk of misinterpretation



Webchat

- ✓ **Expectation for instant response**, but generally felt to be **suitable only for straightforward queries**
 - ✗ Can disappoint and therefore become distrusted easily
- Liked better when driven by a human agent, though some acceptance that chatbots can have a place – **knowing either way matters: impacts greatly on expectations and decision to use or not***



Email

- ✓ Appropriate for **more serious and negative interactions**, where evidence and paper trail may be useful
- ↔ **A well-considered, personal but formal response is expected**
- ✗ Slow response (unwillingly) anticipated, exacerbated by potential need for back-and-forth



Web form

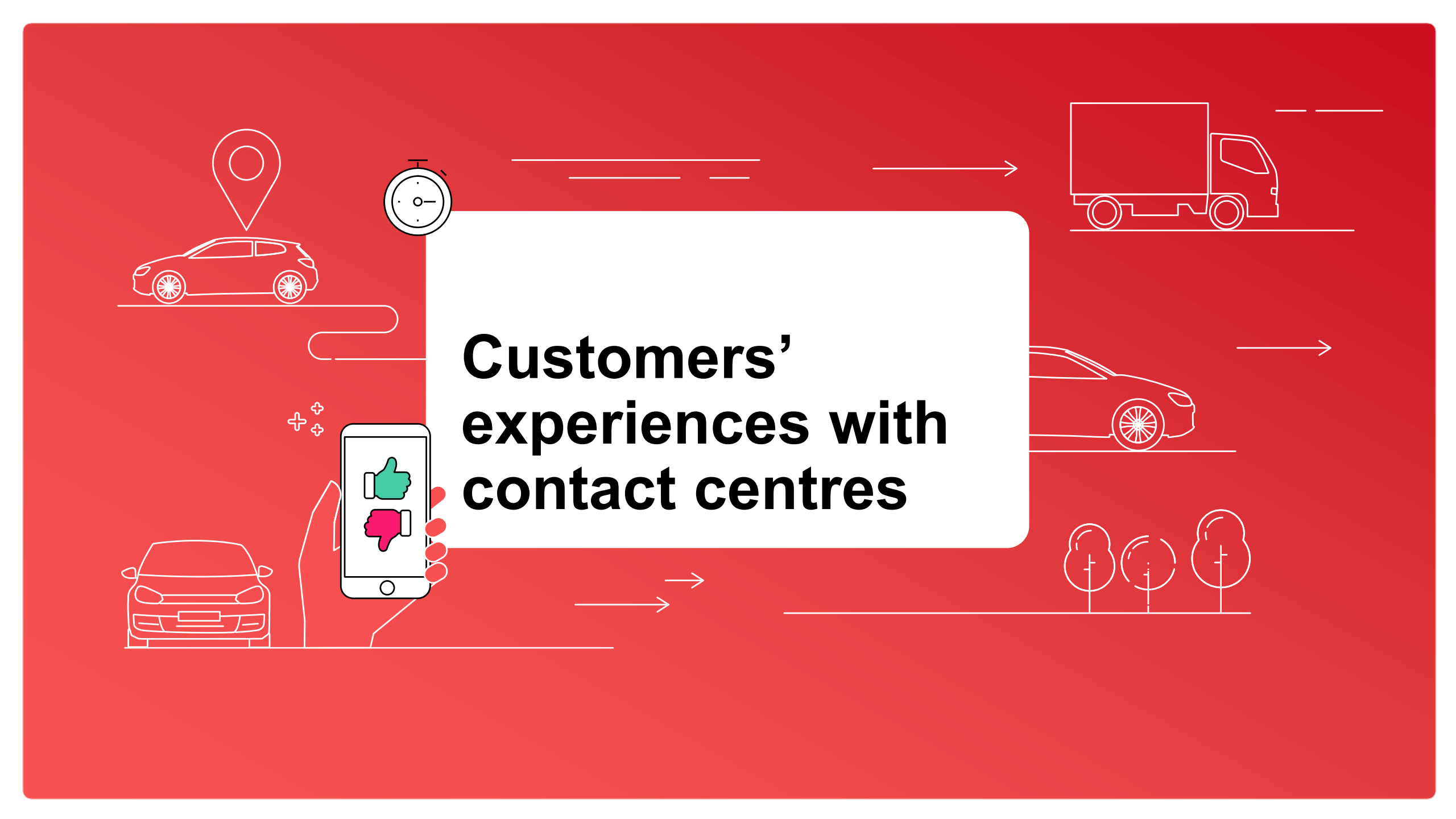
- ✓ **Standardised, efficient method**, preferred by a notable minority, **for compensation claims**
- ↔ In keeping with the standardised input, **a prompt, efficient, no quibbles outcome is expected**
- ✗ Can be too rigid to accommodate some claims, or unclear / difficult to provide required evidence – undermining the efficiency benefit in already-negative context

...clearly a mix of different options should be provided, to meet the diversity of customer needs effectively

*My contact method is determined by how urgent my query is.
Say I realised I needed extra information for a train ...for the next day,
I would contact by phone.... If not urgent I would go by a webchat.
To claim a refund... I want immediate reassurance and so I would go
by phone as well.
When making a complaint I would do it by email so that I can have
evidence ...and [to have] an email trail if I wanted to follow up.*
(Barbara, business traveller)

[It] boils down to which gets the matter resolved and which I can communicate clearest on, which depending what it is, can be a different method to another.

(Oliver, business traveller)



Customers' experiences with contact centres

“

It's like pulling teeth.... you repeat yourself constantly and the only time something gets done is where you start making an official complaint and you go in for team leader

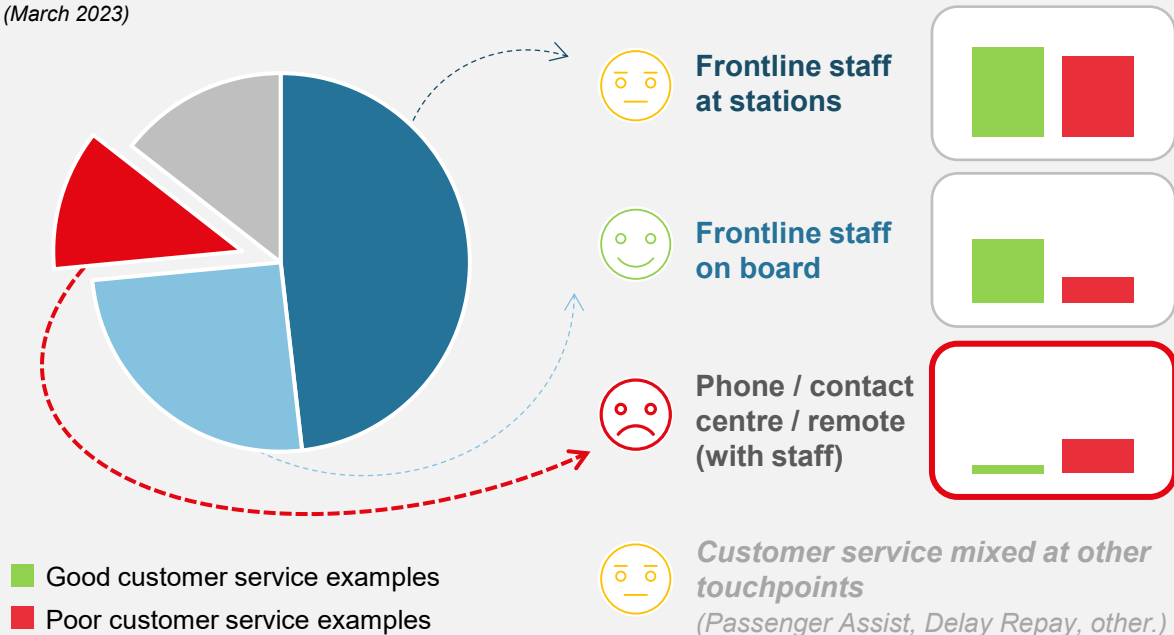
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Rob (32, suburban, leisure traveller)

Overall, the perception of contact centre customer service is typically quite negative

(Recap): earlier in this study, as part of general customer service feedback, participants indicated that **contact centres are a smaller part of overall customer care than face-to-face interactions** with staff, but that their **perception of it is, on balance, more negative**

Frequency of encountering, and rating of, customer service delivered by...
(March 2023)



And when giving more specific feedback about interactions via phone / email / webchat, in July:



Participants described dissatisfactory service overall in about half of all examples that they gave

The remainder of examples were equally split between more positive, and mixed or neutral experiences.

I have never had one situation with [train] customer services that has been solved satisfactorily. I get that ...things can't be automatically done ...But when you're waiting 30 to 60 days, having to make multiple phone calls, being on the phone for an hour at a time, it's ridiculous.

So I've not really had any positive dealings with customer services...with train companies... I dread having to contact them by phone or email because I know it's going to be a fight... It's just going to drag on ... And I to have to keep dealing with it when I shouldn't have to.

If there's an issue, it should be solved. Simple as that..

(Rob, leisure traveller)

Graphs give:

- a) a qualitative indication of how relatively often the community talked about different "touchpoints" for customer service among c.70 examples of it that they described in earlier activities about customer service more generally
- b) a qualitative indication of how often these examples were more positive or negative

Of course, the **context** for interactions with contact centres has some impact on how customers experience the service

The reason for contact via phone / email / webchat is often **negative in nature**; this was the case for around two thirds of the examples described by the community:

- Claim / complaint
- Urgent help re disruption
- (Non urgent) general query



Note: in this activity, participants may have been prompted to think about these types of issue / query, because the initial question about preferred channels gave some examples like this (see page 6). Nevertheless, the reasons for contact that the community talked about here also reflected similar feedback from activities earlier in the research programme, on customer services more generally, where they had not been prompted in this way

...and this is often **compounded by broader poor perceptions of call centres** across service providers in general

So **where the outcome is not entirely satisfactory**, or interaction feels at all effortful, confirmation bias kicks in and **perceptions are further cemented**

*...for some reason [the online claim] did not work and [it suggested] I call a number. **Of course, I had that gloomy feeling of impending hassle**, waiting in a phone queue, giving explanations, perhaps arguing a case and so forth. It is annoying to have to call someone.*

(Riz, leisure traveller)

...but, this expectation can absolutely be turned around

*[It was] a very good service, and most shocking [was that] it was **all done over the phone...a system I'm not 100% sure about, but [now I] would deal with [them] over the phone anytime***

(William, business traveller)

A less than positive overall perception of contact centres is arguably inevitable to a degree, given that the context for contact is often more negative.

However, the incidence of some good outcomes demonstrates that it is possible to do well in these situations: **the industry should learn from good and poor performance, seeking to emulate the exemplars more often, and reduce poor practices.**

...the next few pages look at examples of good and poor practice.

Graph gives a qualitative indication of how relatively often the community gave these types of examples, when describing their experiences with contact centres. (The majority of these examples related to rail services specifically, though two or three were about other services, such as internet providers, where the participant had not contacted a train company)

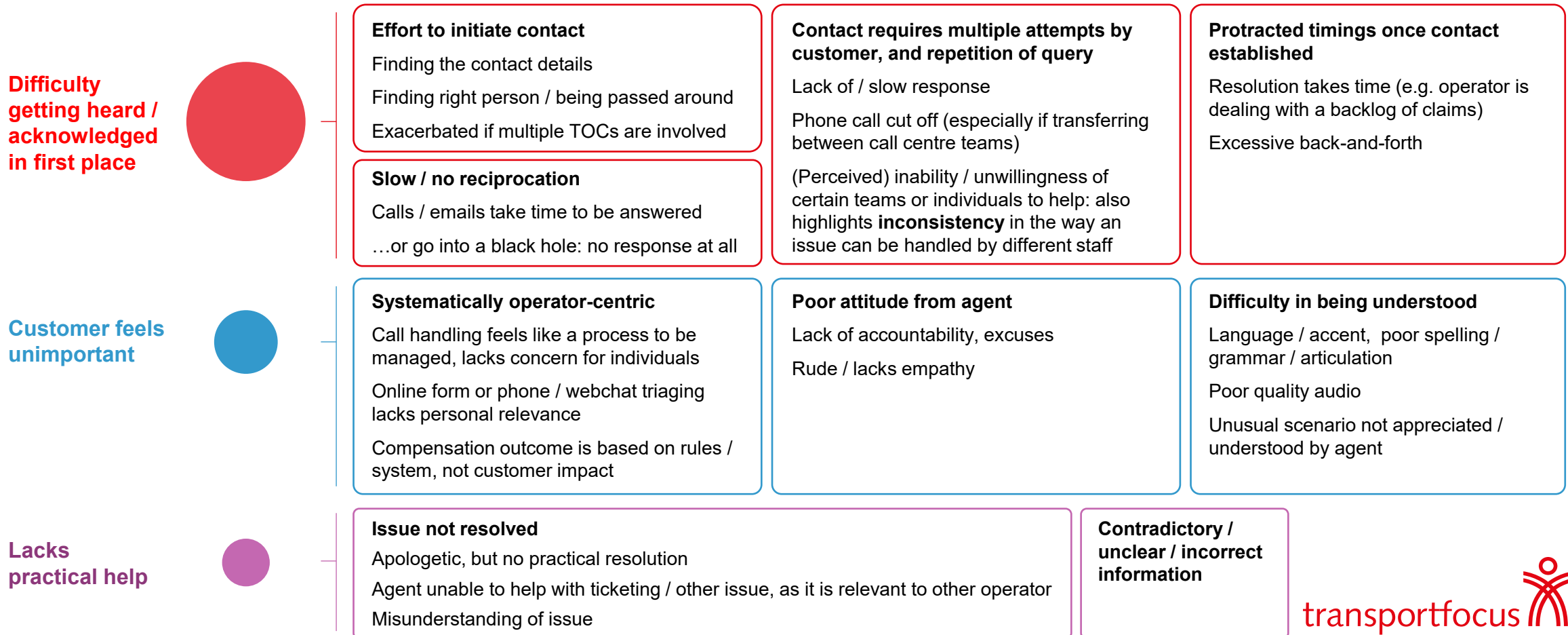
“
She was helpful but
for some reason it
was all
complicated...”

Riz (60, urban, mainly travels for leisure)

When people experience poor service, the reason for this is within one or more of three broad categories, the most common being simply getting heard

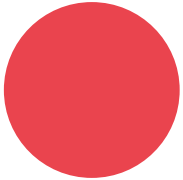
Issues mentioned as a part of an overall negative experience of contact centre

Bubble sizes are a qualitative indication of the relative frequency with which these issues affected the examples of contact centre interaction that participants described.



Some examples of the community's feedback:

Difficulty getting heard / acknowledged in first place



Finding a phone number was a chore in itself. You had to chat to the bot, go through the whole process of entering the booking reference and having everything verified ...[before] it provided a phone number! When you got to speak to a human they were pretty helpful and understanding, it just took a lot to get through the AI!

(Fiona, leisure traveller)

I tried to call [TOC], was on hold for far too long and getting passed between operators, and when I finally spoke to someone the line disconnected and I just gave up.

(Tom, commuter)

[It was a] nightmare to get through... on hold for I don't know how long... it took a few days to actually speak to a human being.

...So they said we'll refund you ...but it's going to take 30-60 days ... [then] I didn't hear anything for a few weeks. I rang them back and I had to re-explain the whole situation again. Same response, we apologise, blah blah blah, and again, you have to wait. I explained to him, I'm not being funny, but you took the money quick enough.

...After much badgering, they finally sorted it. But it should have been sorted on the first phone call.

(Rob, leisure traveller)

Customer feels unimportant



I once... complained about non-compliance with Covid regulations ...The person I spoke to by telephone was approachable, but seemed to see it as an intellectual exercise rather than assuaging my concerns... What they're doing is managing the customer... in trying to head off any real complaint. This is my biggest bugbear with any customer services, whether this is railways or not.

(Gavin, leisure traveller)

I feel ...[call centre workers] don't realise they're actually there to serve the customer and... they tend to ...see you as an annoyance.

(Neville, business traveller)

There is not necessarily anything wrong with ...outsourcing staff overseas, but that does not ...excuse unacceptable ...service... This representative [didn't] understand my queries. [They tried] to persuade me to use the web chat ...despite one of my queries [being] about being unable to connect to the web chat!. The response to my query about being [over]charged was met by the opinion that although incorrect it was good value.

(Mark, leisure traveller)

Lacks practical help



The response was inadequate as they just gave excuses and absolved liability.

(Jay, commuter)

I realised my [next] train was cancelled about an hour to my journey and I needed urgent help. The customer service was apologetic and she assured that I would be compensated. However they couldn't help with booking a new journey and I had to do it myself after we hang up.

(Barbara, business traveller)

...it's all very good being polite. But, you know, you've got to see it through [to] the end

(John, business traveller)

In more positive experiences with contact centres, customers see a resolution to their query or question, delivered constructively and graciously

Principles mentioned as a part of an overall positive experience of contact centre

Bubble sizes are a qualitative indication of the relative frequency with which these features were mentioned in the examples of contact centre interaction that participants described.

Note: a relatively small number of examples of positive experience were given to produce the analysis shown here, and these also included examples from outside of the rail industry, though the same principles apply.

Issue is resolved / tangible outcome



This principle featured in all the positive contact centre experiences described

Compensation received

Question answered satisfactorily

Other tangible resolution, e.g. special assistance plan made, seat booked, etc.

Good attitude from agent / email



Often features a (genuine, willing) apology – with pro-active offer of how to resolve or compensate for the problem

And/or friendly, patient, kind, human

Efficient agent
(once contact established)



*In February I had to speak with [my provider] about my TV service...it was brilliant! I called the customer service **via my [provider's] app and didn't wait long at all**, when they picked up the young lady was excellent.*

Speed / ease getting through in first place



*...once I'd explained my problem **it was dealt with immediately, I was given a complete breakdown & was told they were in the wrong and I would have credits added to the accounts.***

Customer feels informed / transparency



*The whole experience **took 10 minutes and it was all updated on my account...**which I could check while still on the phone.*

10/10 customer phone service.

(William, business traveller)

Separating these positive examples from participants' negative and more mixed experiences, is the fact that **customers received both a tangible outcome and a friendly, personable interaction – whereas more negative experiences often include either one or the other** of these features.

The difference here is that:

- Any good attitude is cemented or “proved” by a feeling that the customer has been truly understood, because the outcome was successful
- And/or that the outcome is appreciated and feels genuine because it was delivered willingly

Regarding contact centre **location**: what's important to customers is being able to communicate easily, with a fully competent, knowledgeable agent / team

After participants had given examples of dealing with a contact centre by phone / email / webchat, they were asked where the team or agent handling their query was based



In contact examples they gave, **about half had no idea** where the team at the other end was based

This perhaps **indicates that people do not engage with this element of an interaction very much** (unless it creates a problem)

The majority of the others knew or perceived that the contact team was in the same region of the UK as where the query related to

Only two people thought that the contact team they interacted with was overseas



Customers' **preference for a contact centre's location (in a rail context) is very mixed**: for about half it doesn't matter, but for the other half this brings potential for difficulty in communication or reduced effectiveness

There is value for customers in the agent having sufficient local knowledge to be able to understand the nuances of a query or complaint, and therefore to respond in a way that feels sufficiently personal and tailored.

This can feel especially important for train travel.

I'd prefer them to be in the same country as I feel like they can empathise much more ...and maybe they [have] more relevant information.
(Una, commuter / leisure traveller)

I also think there is a difference for train companies (as opposed to ...internet companies, for example): the UK train network is now, for better or worse, regionalised. If you [have] ...an issue with Northern Trains specifically, it feels ...that the person you deal with should live and work in the North!
(John, business / leisure traveller)

Beyond this, for many it doesn't matter in practice where the contact centre is based, providing the person on the other end can understand the customer really well, and vice versa. **Strong accents and poor proficiency in English are common problems (or fears).**

I don't mind where the contact is so long as they are proficient, helpful, knowledgeable and resolve the matter. Accents sometimes can be an issue, ...but [as an English person, sometimes] I have found Scottish accents difficult to understand and have to apologise for getting them to repeat things
(Riz, leisure traveller)



When there is a communication difficulty due to language / accent or poor understanding of the problem due to lack of personal experience, **this can feel like cost-cutting or de-prioritising, and as such a devaluing of the customer's time and needs**

...It's a matter of the company removing the problem one step even further away... Overseas call centre staff (and British ones, for that matter) are not directly involved in the service but..., often on a low wage, deal with a situation they have no direct understanding of
(Gavin, leisure traveller)

If effort-free communication via a fully competent team can only be delivered within the UK, then it should be, but if it can genuinely be delivered elsewhere, in principle this is acceptable to most

Overall, the community is currently sceptical about automation or AI

There is no real customer segment pattern within this, e.g. sentiment is mixed regardless of age or familiarity with rail



A little over half have an outright negative impression, often from experience

...you get into this circle where ...**it responds [with] nothing to do with what you want**, and its very frustrating. Sometimes even if you type 'speak to an agent' it keeps asking questions - 'what about' etc...
(Claire, leisure traveller)

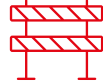
I hate it, it feels very **impersonal**, and I never feel like I can explain myself properly as **it only understands a few words**
(Una, commuter / leisure traveller)

There are **nuances to every ...experience ...[that bots cannot] cover...** [After] the plethora of information ...on a website and still the customer needs help then it must be an issue for them if they take the trouble to call.... [So] the least I expect is a person...

Furthermore if it is a complaint... an automat[ion] cannot offer the empathy and understanding needed at that time.
(Fiona, leisure traveller)

Several try to bypass bots, even at the outset

...you have to ask the question in a format they understand. Anything ...not routine ...takes forever ...I usually give up and type in some rubbish so I get referred to a human.
(Clive, business traveller)



At worst, like overseas call centres, **automation can feel anti-customer**

I find them very limited ...and very poor customer service. I feel **they are used to waste customers' time or put them off raising issues.**
(Sarah, leisure traveller)

Automated responses **may save a company money as they make the user give up but they rarely solve problems** for the individual.
(Gavin, leisure traveller)

The IVR for [TOC] is **abysmal** ...for passenger assist. I don't mind call trees but [their] software ...can't even pronounce words correctly ...It irritates me that they've clearly invested money on automat[ion], but **is its slovenly pronunciation going to be representative of its service?**
(Joshua, commuter / leisure traveller)

Just tells me that I can find all this information online anyway, **lazy and cheap** options
(Colin, business traveller)



The rest see benefits in some circumstances, but are consistent in placing caveats on this.

(Only two are more convinced, one of whom works in this field)

It's only really acceptable for **triaging** and **simple queries** ...and in both cases, providing that **non-standard needs, and the potential for human intervention, are also accommodated**

If it is efficient [in] directing my query to the correct person (and I stress 'person'), then it's useful. But if it doesn't 'compute' my issue or fails to connect me to the right [team], it is ...doubly infuriating.
(John, business / leisure traveller)

[It] should be intelligent enough to put me through to a human ...if it can't help me.
(Lara, business traveller)

I prefer **when [it] tells you how far down in the queue you are to speaking to someone!**
(Michelle, leisure traveller)

Often the FAQs are nothing like the question I asked. Or [it] just directs me to a website rather than the specifics of my question. **I imagine this will get better but there is a way to go yet.**
(Simon, business traveller)

Like placing service overseas, using any kind of automation can be acceptable providing it doesn't compromise on the speed, quality and ease of accessing or interacting with customer service

“

Companies need to get the balance right between pushing people to contact them exclusively online or use self service / chatbots... but where there is a genuine need for support, making sure that they can contact a real person easily

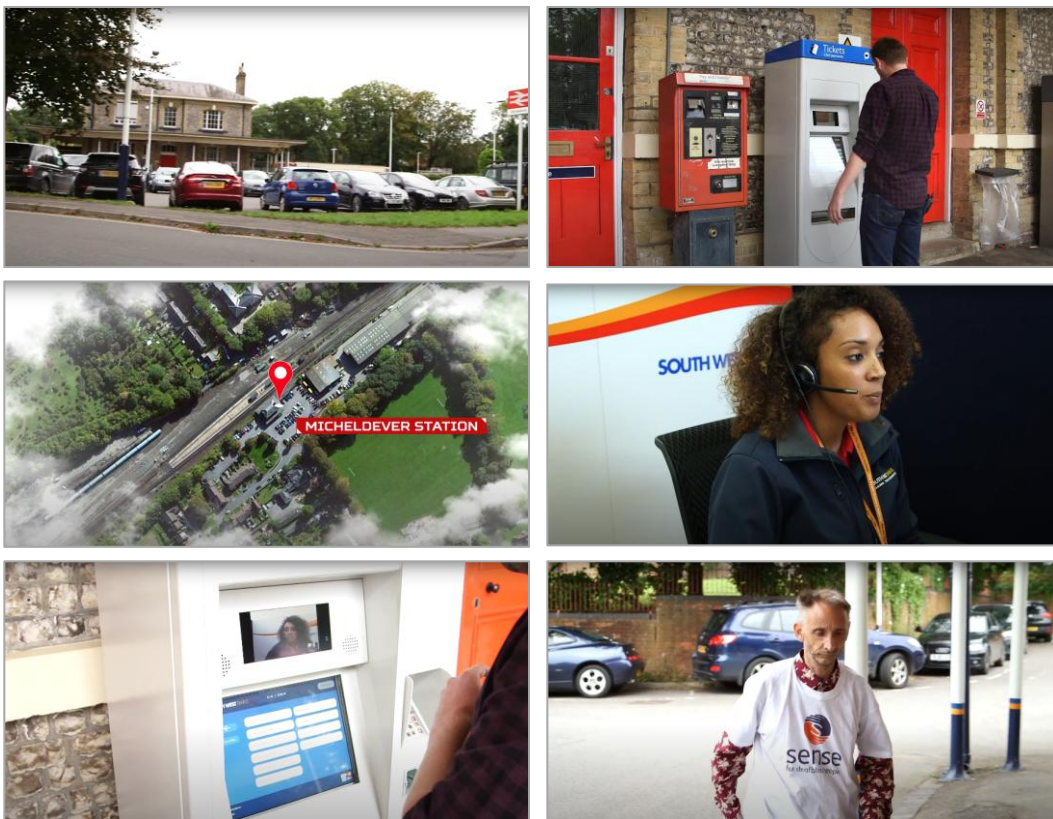
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Stuart (48, suburban, commuter)



Customer reaction to “video call” / remote take-over function within TVMs

The community was shown a video demonstrating the idea of remote assistance via ticket vending machines



It's a popular idea: almost everyone could see themselves using it

If it was available at your station, would you personally use this remote assistance?

- Yes - definitely
- Yes - probably
- No - probably not
- No - definitely not



<https://www.youtube.com/watch?v=j7JiPIEwCtU>

Base: all community participants, June 2023 (30); figures shown are absolute number of people

Participants identified a number of advantages and potential use cases



Key benefits centre around this as an extension to the on-site staff

- ✓ Customers do **prefer to interact with a “real” person, and this offers much of that benefit**
 - An obvious value where there are no or limited existing staff
- ✓ ...and moreover, **has potential to enhance and build on the existing on-site staff provision**
 - Frees up on-site staff for more complex customer circumstances or those with greater / physical need
 - Expectation for all-hours, on-demand service provision
 - Potentially quicker than queuing to ask at a ticket office / information desk, trying to find a member of staff, or looking up information yourself online
 - Expectation that a centralised contact team might be better informed of wider network service status, than on-the-ground staff – and certainly compared to signage / online info



But this also helps to meet real customer needs and expectations

- ✓ **Tickets are notoriously complicated**, this can help both the individual in need, and the potential queue behind them (incl. via remote take-over, explicitly appreciated by a minority)
- ✓ **Innovative: railway is demonstrably keeping up** with how many customers want to go about their lives, **and putting a customer need first to find a genuinely useful idea**



Potential value for almost anyone...

- ✓ Many see themselves using this for **non-ticketing queries**



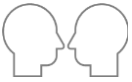
...but especially for those who:

- ✓ May be **less familiar with rail travel, or with TVM interface**
- ✓ Have some types of disability, including...
 - **impaired vision** as shown in the video
 - other physical **disabilities which make using a screen difficult**
 - cognitive **impairments which make understanding tickets, and/or the machine more challenging**
- ✓ Have their **hands full, or their attention split**, e.g. keeping an eye on children



There is likely to be appetite for this type of service delivered separately from TVMs, via screens at dedicated help & information points

A selection of the community's feedback, demonstrating overall enthusiasm for this concept:



Offering much of the personal (tailored) customer service potential, from a knowledgeable trusted source, as in-person, on-site staff can

*I love that the person helping can access the machine, so **they can see exactly what problem you might have** if any, I love that **you don't have to explain where you are to ask about times** etc. I feel like they would be able to automatically **find the best value ticket for you**. I would really appreciate the human help if I was running late and needed to know what platform etc., as **I would trust a human to have the most up to date information** more than machines/signs!*

(Becca, business traveller)

...further enhancing already-valuable customer service delivered by staff

*Being able to speak to someone ...is something I value, but I don't mind if that is by ...technological means. **It can at times be even better**, as the staff in a bigger office may be able to ask colleagues if it's a tricky question.*

(Colin, business traveller)

*I ...purchase my ticket from the office just to be sure and of course ask the follow up question of when is the next train from which platform. ...[So] this has that ...and **actually is friendlier than ... the ticket office, ...[which] is set up as a fortress to protect staff. ...Even though ...remote [this] feels more professional and personable.***

(Riz, leisure traveller)



Dealing with a notorious pain point: using ticket machines

*I have had difficulty with ...[the] multitude of different tickets and feeling pressurised by ...a queue building up behind me. **This would come in very handy to get my ticket dispensed as quickly as possible and offer reassurance to anyone waiting behind that progress was being made in purchasing my ticket.***

(Mark, leisure traveller)

Creative, customer-first thinking to meet a need

*Even though I'm pretty good with these machines, sometimes things go wrong so that would come in really handy. **At last, somebody thinking outside the box***

(Colin, business traveller)



Usage beyond ticketing

*I like the idea because **I'm imagining something like a big iPad where you can video call an advisor**. Most people have got used to using video calls because of the pandemic, so most people are comfortable speaking to someone remotely. sometimes its nice to see a helpful face when you need some advice.*

(Rachel, business traveller)

*Can I just say what a brilliant idea this is! I can't imagine how many people this would help. I love the idea. For someone that may not be able to use the ticket machine **or just might need help with something regarding the next train, navigating around the platform etc.**, this is really great.*

(Michelle, leisure traveller)

Nevertheless there are some potential watch-outs, from customers' perspective



Key concerns and caveats are:

That the tech is delivered in a way that works with how customers will interact with it – at each station, as an individual case

- × Potential for queues, preventing “standard” use of TVMs

(perhaps partly resolved by moving it away from TVMs and onto separate help points – which also chimes with the strong appetite that participants have had for touch screen and interactive help screens at stations, in other feedback)

- × Fair, constructive, reliable access during disruption
- × Potential for overuse / misuse / vandalism

Quality and reliability

- × Clarity of the audio and video, especially at busy stations
- × Some minor distrust that it will work – overall, in terms of the remote take-over functionality, etc.
- × ...or that the contact centre team will respond

Inclusivity

- × Not being able to reach from a wheelchair
- × “My 89 year old mum would be lost”



In order to be effective, a concept like this must be...

Reliably staffed in the contact centre

Throughout hours of rail service operation (across the network, not only from an individual station)

Well-publicised and signed

Especially for those who might benefit the most (including infrequent and less confident users of the station, and the railway in general)

Provided in sufficient number

And in multiple locations around the station (i.e. not helpful if you are on the other side of the station, or on a different platform, etc.)

Clean / sanitised, well maintained



And some worry that this concept might pave the way for staff reductions

From customer perspective **this should be a supplement to existing staffing**

(Indeed, it's not for everyone)

While **it might help mitigate for limited staff at stations where this is already the case**, reducing staff as a consequence would be extremely unwelcome to customers elsewhere, and **potentially very reputationally damaging**

...to the point that it may be **wise to reassure station users** that this will not replace or allow for reduction in existing staff provision, if and where the concept is rolled out more widely

A selection of the community's feedback, demonstrating key caveats to their enthusiasm:

Key concerns, and requirements in order to be effective

*My biggest concern is that it would be only be a pleasant experience - like in the video - under normal circumstances. **I would only really need this ...at times of disruption.** This would probably be the case for most other people too. Therefore, **there would likely be huge queues** at these times. In which case, **is it any better than what we have now?***

*(I'd also have a few concerns about **vandalism...**)*
(John, business / leisure traveller)

*My only fault with it is the **sound quality**, I expect it to be as clear as a phone call (video would make it even better) in the video it sounds quite muffled which I would struggle with.*
(Stuart, commuter)

*I'm not sure if I would be able to reach the help button being a **wheelchair user**...If I needed someone physically to ...put the ramp out for me, then it would not be ideal.*
(Sarah, leisure traveller)

*But it seems one will know this service exists only when using the machine. I think **people should be made aware even when they are not on the machine, that this help exists.** Maybe through posters.*
(Barbara, business traveller)

*Only disadvantage is that if there is only one machine available at the station, **you could get stuck behind someone asking lots of questions** and this might slow you down and lead to you missing a train.*
(Clive, business traveller)

*I think if its available all the time it would be useful and **it needs to be clear when the service is unavailable.***
(Julie, leisure traveller)

Broader context around station staffing

*I like that its an option that available because having someone remotely is **better than having no one.***
(Lara, business traveller)

I always prefer having a real person to speak to... [who] can often see if you need assistance rather than having to go to a machine and press a button.
(Neville, business traveller)

*I do worry about the **incentive to remove frontline staff from stations though.***
(Joshua, commuter / leisure traveller)

*I think that **having a human presence in as many stations as possible is vital** - to help everyone but especially the most vulnerable... **I feel opposed to the idea.***
(Mike, leisure traveller)

Broader improvements to ticket vending machines

Participants were asked what other improvements to TVMs would help them

(Note that about a quarter of the participants never or only very rarely use TVMs, and several prefer to use digital tickets bought and fulfilled online or via app)

Functionality

Features for speed & convenience

Reducing effort in typing destinations: voice assistance, predictive text

Removing the need to insert credit card and/or streamlining code entry (e.g. scan a code for immediate print-out, for collections)

Larger screens

Additional information

TVM to tell you which platform to use (and how to get there), time of next relevant train

More details about any interchange (on screen, printed on ticket)

Digital fulfilment

Instead of issuing a physical ticket, let me scan it (QR) to my mobile
(Charles, commuter)

Reliability in terms of pricing / deals

TVM to (honestly) help find best value ticket option

Special deals to be available (some offers only available at ticket offices)

Management & delivery

Operational reliability

Especially longevity and reliability of touchscreens

In-person, nearby assistance

Accessibility

e.g. lower for wheelchair reach

Greater number

Cleanliness & maintenance

...it's the place to collect germs.
(Barbara, business traveller)

Summary



Summary: customer preferences and experiences

Customers' preferred contact methods vary depending on why they are getting in touch and how urgent it is, and to some extent on personal habit and what they feel comfortable with: **there is a need to provide several different contact options, for different scenarios and to ensure different types of customer have access to assistance.**

The way that different contact methods are used also highlights implications for the way teams respond. **While all customers deserve individual, fully engaged attention, and service that is delivered with empathy regardless of channel, there are some priorities around the nature of operators' responses for each contact method:**



Many customers prefer to use the phone over text-based methods, for all kinds of contact need, but **they see its primary use as where the reason for contact is urgent or complex.** As such they want reassurance, acknowledgement and the ability to ask further questions or discuss – and expect **a genuine, empathetic, human interaction, and a knowledgeable agent who is able to give their full attention and sufficient time** on the call



Email is typically seen as the appropriate method for **making complaints and, often linked with this, claiming refunds or compensation.** The required response is **more formal, but still expected to be well-considered and personal.**



Webchats are somewhat polarising: some are distrustful, but others see them as useful for **quick responses, at all hours, to fairly straightforward queries** – as such **it's critical that answers are fast and accurate.** There is some preference (and expectation) for a human to run the chat: where this is not the case **it is important that customers know if a chatbot is being used, as this affects their expectations and whether or how they will use it – and how they will receive the response**

Customers' perception of customer service delivered by contact centres is generally quite poor. It is arguably difficult to provide consistently satisfactory outcomes, given the reasons for contact often come from a negative start point (a complaint, compensation, a query often arising from general confusion or anxiety, or train disruption) – but it is not impossible, and there is potential to improve.

The biggest issue that this community has is simply getting through to and feeling heard by contact centres in the first place. **Operators need to make it easier for customers to find phone numbers and email addresses, to be faster at responding to the customer as an individual** (i.e. more than just an automated “hold” response), **and to reduce the number of individual agents** that a customer needs to interact with to get a resolution.

Once contact is established, **key to providing satisfaction overall is providing an appropriate (from the customer's perspective), tangible outcome, and delivering this willingly, graciously and with a human touch.** There is a problem in some cases that complaints and queries feel as though they are treated by operators as a process to be managed and kept on top of – whereas customers need to feel that they are recognised and helped as an individual.

Summary: implications for the tools and tactics that are used to help manage remote customer contact

This research has looked at three ideas in particular:



The location of contact centre agents

Overall the precise location of the person on the other end of a call / email / webchat is not important to customers. **What matters is that the communication is easy and constructive** (so strong regional or overseas accents can be difficult, and local language and dialect proficiency is important, as is the quality of audio and connection), **and that agents have the right knowledge, including of the local rail network, too be able to help**. This latter requirement can be more important for rail than for some other service industries, and so location should be considered very carefully.



The use of automation including AI

Bad experiences with automated services (in rail and elsewhere) have made the majority of people in this community skeptical of any automation. **There are recognised potential benefits – especially in triaging**, which can help the customer as well as the service provider – but these are perceived as being **easily undermined by misinterpretation or limited scope in automated tools, leading to protracted effort on the customer's part**. Automation is likely to improve (and the public will become more adept at getting the best out of it), but in the short and immediate term, where used, **automated phone options, forms and chatbots should ideally have an easily accessible human override, to address customer needs which don't "fit"**.

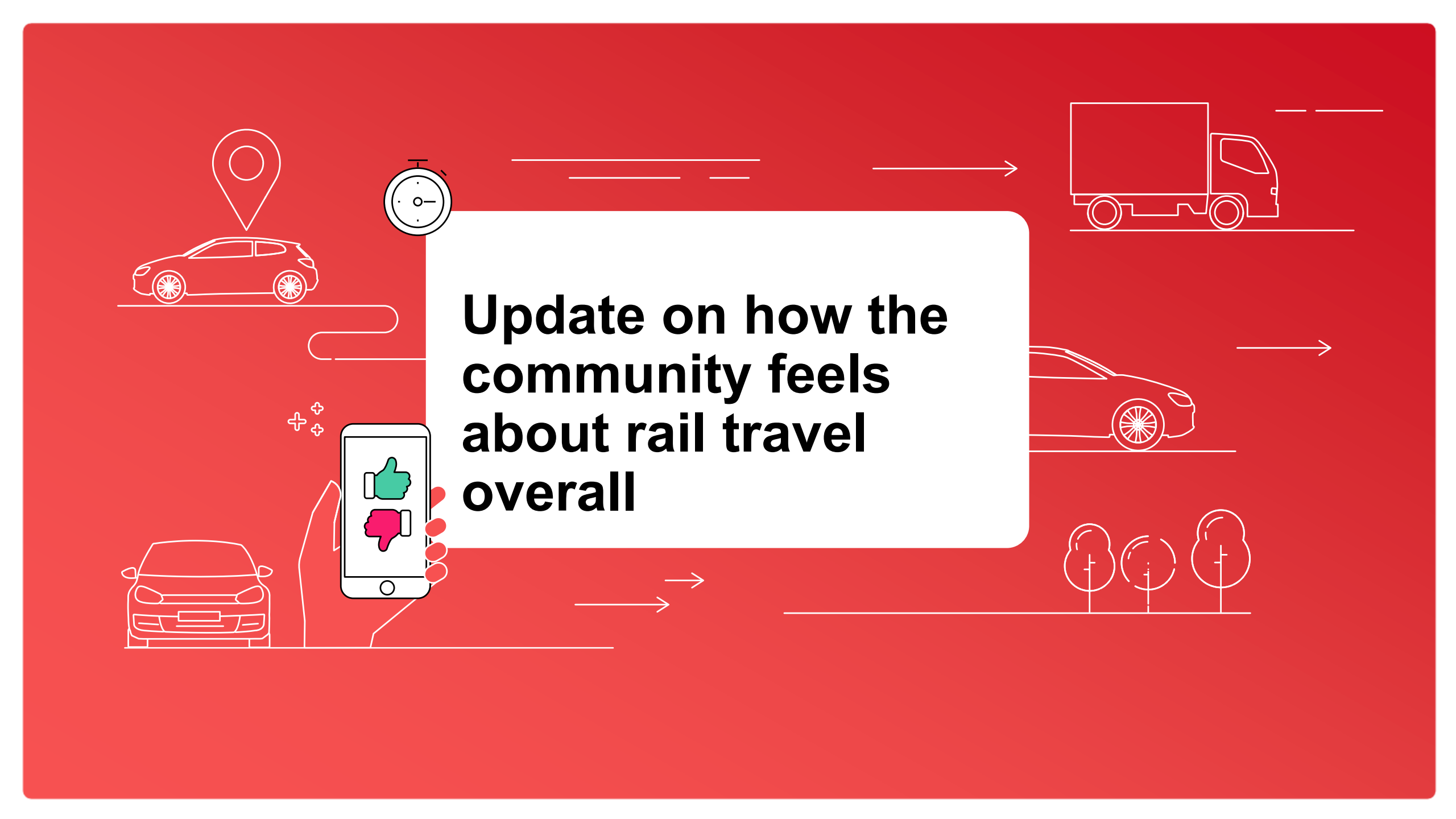


Bringing the contact centre team onto the station, virtually – in this case via video-call and remote take-over functionality within TVMs:

A popular idea overall, with benefits beyond ticketing alone – if similar is rolled out, customers want to see such a concept being:

- Reliably staffed, throughout hours of rail operation
- Well-publicised and signed
- Provided in sufficient number, at multiple points around a station
- Clean and well maintained

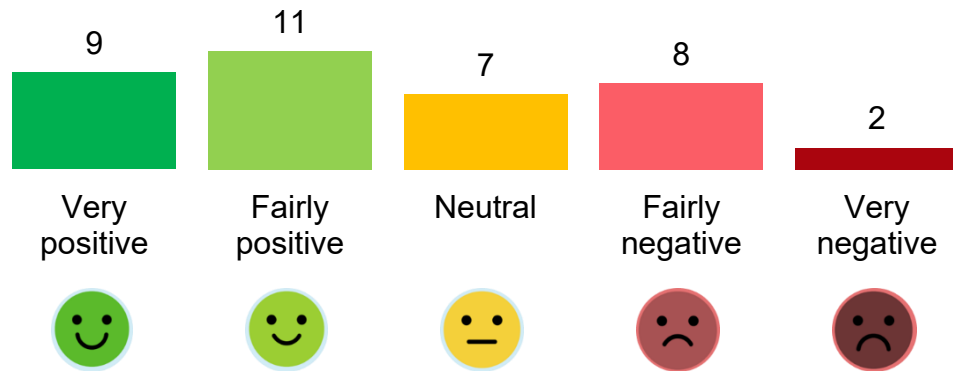
...and crucially, **this type of technology is seen as a potential extension existing staff**, or an improvement where there is limited or no staff – **it would be extremely unacceptable to customers if this was used to justify any reduction in staff**.



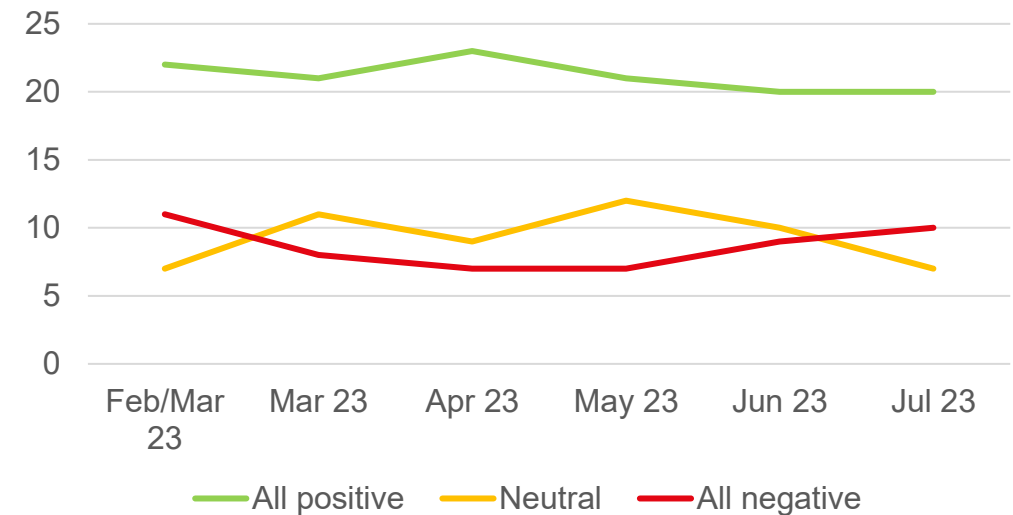
Update on how the community feels about rail travel overall

Very mixed impressions of rail overall among the community, with slightly increased negativity (rather than neutrality) into the summer

How you feel about travelling by train at the moment: A snapshot
(Task 36)



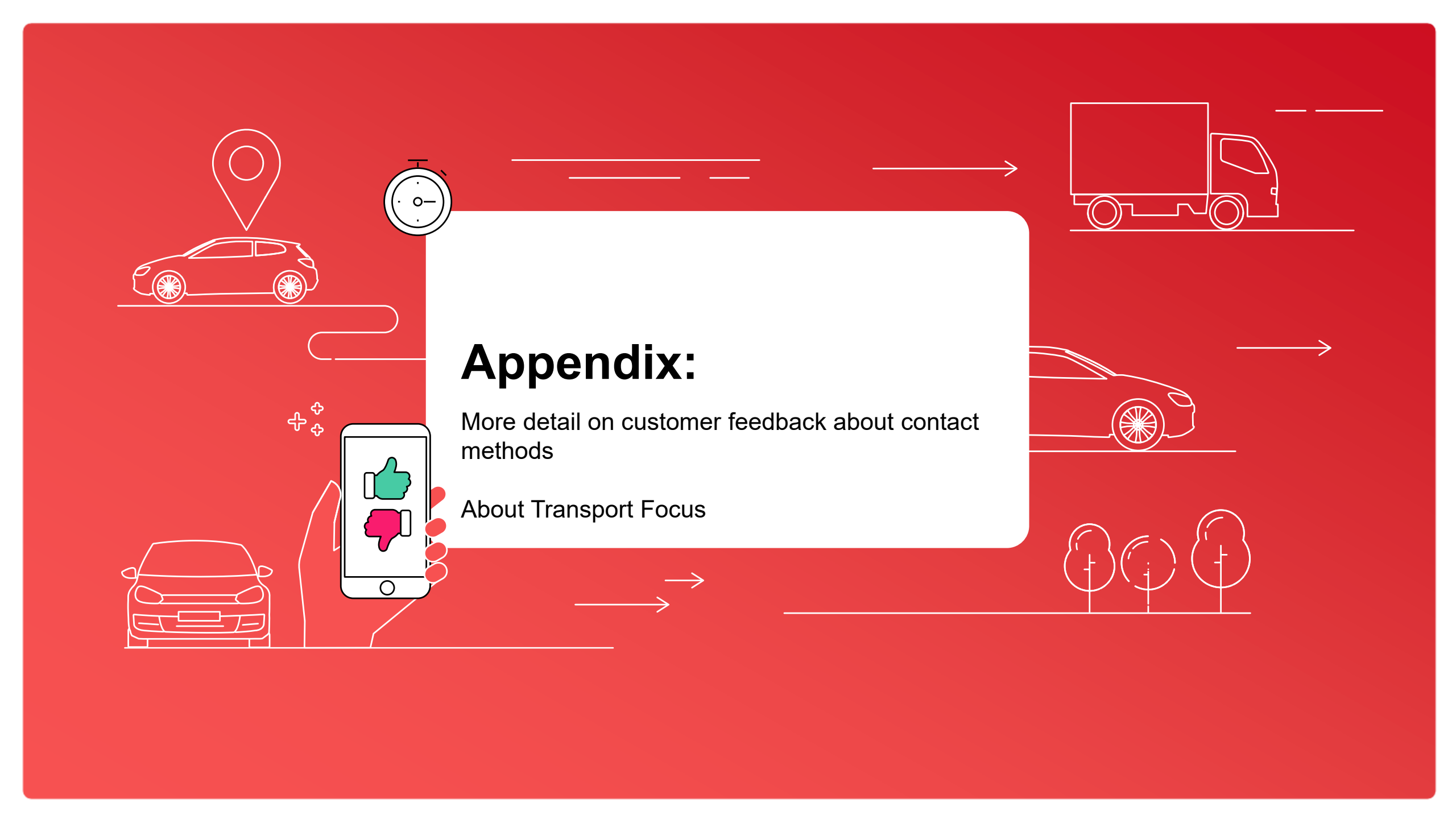
Trend so far



Participants are more likely to be positive when they....

- Typically travel for leisure, rather than work reasons (with regular commuters in particular being less positive overall)
- Live in more urban areas
- Do not have a disability or other health condition

Base: all community participants, Jul 2023 (37); figures shown are absolute number of people



Appendix:

More detail on customer feedback about contact methods

About Transport Focus

More detail on customer feedback about contact methods



Phone

Preferred by many, regardless of contact reason, but most fitting for **quick response to general queries***, or for **grievances where customer wants acknowledgement**

- ✓ More confidence in **getting across the points that need to be made / asked**, (though this may require effort – see below), including the ability to...
 - confirm that the agent has understood, and that customer understands the agent
 - express personal / emotional impact
 - ✓ Valued for **human touch**: response therefore expected to deliver well against this (rude, unsympathetic, defensive, or unhelpful responses can feel even less acceptable via phone than in other channels)
 - ✓ (When it works): **efficient**, no back-and-forth – having opportunity for a two-way, real-time conversation (should) make for quicker resolutions. This includes allowing for one question to lead to another.
 - ✓ (Linked to above) immediate reassurance or **acknowledgement from the company that they have registered the situation**... other options have the potential to feel like a black hole
-
- ✗ Potential for long queues
 - ✗ Some risk of misinterpretation (other contact methods are “black and white”)
 - ✗ Some dislike “small talk” aspect

[For] a complaint I want to speak to someone to make sure they understand ...and they can ask supplementary questions to help them understand how I want it to be resolved.
(Stuart, commuter)

I prefer talking over the phone so I can get my point across exactly how I want them to hear it.
(Caleb, leisure traveller)

[For a complaint] it is better to speak to a person as [written methods] cannot capture your tone in the same way, or make you feel ...understood and ...taken seriously.
(Fiona, leisure traveller)

My issue is important to me; I want to get it dealt with ASAP... the phone ...[means] 5-10 mins later I know the company is aware of [my issue] and [if] possible has given me a solution.
(Lara, business traveller)

Calls are frustrating due to long wait times. [I prefer] chatbot, [but if that] doesn't help resolve it, [I] will switch to calls.
(Charles, commuter)

I prefer ...things in black and white. Sometimes ...on the phone you can't understand them or they can't understand you.
(Marie, leisure traveller)

I always prefer to phone for special assistance rather than use the web form because I'm never quite sure whether, um, the request [is picked up]. And it's quite a complicated journey.
(Joshua, commuter / leisure traveller)

*E.g. about ticket restrictions, whether trains are running on a certain date, etc.

More detail on customer feedback about contact methods



Webchat

Instant response, including potentially out of hours; **often expected to be suitable only for straightforward / common queries, but often preferred in these cases**

- ✓ (Usually) perceived to provide speedy responses, suitable for relatively straightforward questions
 - (Linked to this, for some: ability to multi-task while you wait for each response)
- ? A mix of expectation around whether chats are manned or automated: some appear to assume they are chatbots, others assume a human dialogue, and some recognise that either could be used

Human vs chatbot really affects peoples' expectations for the utility of this feature and therefore whether and how they use it: **could making this clear, before opening a chat, be beneficial – to avoid disappointment, or to encourage usage where a customer may wrongly assume this option isn't relevant to them?**



- ✓ Generally well liked when driven by a human agent (though this can lead to disappointment against out of hours expectation)
- ✓ Though chatbots can go some way in the right circumstances and, in particular, many accept and can see benefit to their potential role in triaging queries

If automated:

- ✗ Can misunderstand, or be too rigid in its response, or its requirements for how customer asks questions in the first place
- ✗ Can be frustrating when this means the triaging role doesn't get the customer to their next point in the contact journey quickly and efficiently – undermining the key benefit of speed

It offers the speed and convenience of a phone call with the issue being sorted there and then, but not having to sit on the phone, I can carry on doing other things whilst waiting for the quick replies, ie looking after my daughter or working.
(Becca, business)

For simple queries, I prefer web chat as it is immediate and usually quicker than by phone. Webchat takes less effort in my view. Also I don't especially want to speak ...and make small talk with simple queries. Speed is more important.
(Clive, business traveller)

Webchats for general enquiries are easier for me as it's not a personal issue and I can get a resolution online without having to communicate via telephone.
(Martin, leisure traveller)

I like to use webchats as they are usually quick and simple and there is usually a real person at the other end who can deal with the query quickly.... I prefer chat as I'm a little hard of hearing and it can be difficult to understand accents.
(Rachel, business traveller)

...web chat so that I could have contact with a person in real time just in case there were further questions. I generally prefer not to speak to people, sometimes it's hard to get through on phones or understand if the line is not good..
(Sarah, leisure traveller)

More detail on customer feedback about contact methods



Email

Appropriate for more serious and negative interactions, where evidence, detail and paper trail may be useful: a clear preference for complaints / compensation

- ✓ Provides opportunity for customer to collect thoughts and **ensure issue is phrased well**: partly for clarity, partly to avoid confrontation and any hindrance that this might have on their final outcome – hence most popular for more negative scenarios: complaints and to a slightly lesser extent, compensation claims
 - ✓ Evidence of the customer's attempts to be heard, **a paper trail** to fall back on
 - ✓ Ability to attach receipts and other **evidence or detail** to support a claim or complaint
-
- ✗ Can be slow – several days (or more) for a response
 - ✗
 - ✗ Potential for lots of back and forth, exacerbated by this slower pace of dialogue

For complaints and such like I prefer email. I like to sit and think through my complaint and word it, read and check it before sending....I find [phone] too immediate and confrontational. I believe I will get a better response if I am calmer and an email helps ... gain perspective..
(Riz, leisure traveller)

I can present the information in my own way and time.
(Gavin, commuter)

If I wanted to complain or claim a refund I would prefer email as it is more formal and I have the email trail as evidence of what has been communicated.
(Rachel, business traveller)

If I wanted to make a complaint, I would most definitely do this via email. This is because... you would want to go about it in a formal way and... I feel it is important to get everything in writing.
(Michelle, leisure traveller)

With email sometimes you have to wait days for a response which can be really annoying. And if for example you forget to say something in the email – a date or something – then you have to wait for them to reply [before] you respond [again] and it just ends up taking a ridiculous amount of time.
(Claire, leisure traveller)

More detail on customer feedback about contact methods



Web form

Preferred in some circumstances by a notable minority (especially regular commuters), **for compensation claims**

- ✓ **Standardised process** (especially where details are pre-filled based on a pre-existing customer account).

(This can be appreciated in context of compensation claim, where **avoiding further effort for the customer is critical after an already difficult or disappointing journey experience**)

- ✗ But **standardisation can mean inflexibility**, which creates effort and undermines this potential benefit of online forms.
(Several participants have given examples of this, unprompted, both in response to this activity about contact centres, and in other tasks about customer service and disruption more generally)
- ✗ Some have also reported **inaccurate tracking information about the status of a claim**
- ✗ And **difficulty with completing the form – especially providing the right evidence**, where, for a number of different reasons, the customer may not have physical tickets for example

Claiming a refund or compensation should be a fairly standard process so an email or predetermined form would work for me

(Stuart, commuter)

[For] refunds, I'd be fine with an online form if it was simple... i.e, Delay Repay. What I would say having used forms in the past is that train companies could do a better job of spelling out ...what they need, first time. ...[Otherwise] it leads into a whole book of correspondence or follow-up questions.

(Joshua, commuter / leisure traveller)

I applied for a refund of three journeys following a change of plans due to a family bereavement. The online form allowed you to apply for a refund, but nowhere did it allow you to indicate a reason why.

The first ticket was refunded immediately... The other two tickets showed online as pending but as you went through the form it showed as request cancelled.

I phoned up twice. The first time I was told it would be dealt with and refunds issued, but nothing happened, so I tried again, and the second time, it was processed.

It was disappointing that it took a good deal of determination to get these refunds... especially in such difficult circumstances.

(Fiona, leisure traveller)

... but it doesn't tend to work very well when things are a bit more nuanced.

So, for example, a train was delayed [meaning] I ...would miss my connection. So I got another train. And when I claimed for a refund, they gave me a portion of the original ticket for how long that [original train] had been delayed. And I said, well, no, because it was delayed I had to buy another ticket, blah, blah... Another one was where I had to claim a portion of my season ticket rather than what it was offering me in the in the check box.

*So when that doesn't work, you end up in an email trail... And obviously, you have to take pictures of your tickets and all the rest of it. So **it's a bit of a faff.***

(John, business traveller)

About Transport Focus

Transport Focus is the independent consumer organisation representing the interests of:



Bus, coach and tram users across England outside London.



Rail passengers in Great Britain.



All users of England's motorways and major 'A' roads (the Strategic Road Network).

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Transport Focus is the operating name of the Passengers' Council

We work to make a difference for all transport users.