

Shaping Rail's Future: Customer Community

Report: Nov 2023

Workshop: the on-board experience

Facilities & services on board:

Catering | toilets | wi-fi

Shaping Rail's Future: the customer community



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

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



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

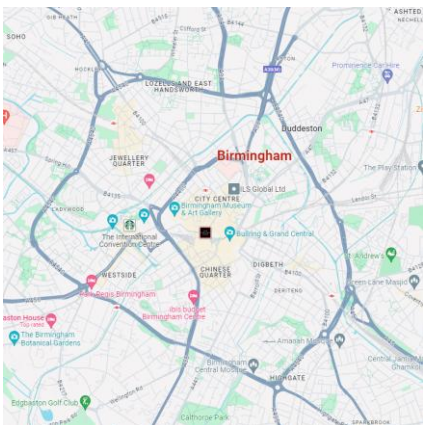
In addition, two face to face workshops to discuss topics further, generate ideas, and feed back on proposed concepts and solutions



12 months
from February 2023

Names have been changed throughout this report to protect anonymity

November 2023 saw the second of two in-person workshops with the participants



Saturday 4th
November 2023



Central
Birmingham

Full day workshop with
nearly all of the community,
joined by GBRTT, DfT and
Transport Focus colleagues



**Deep focus on customer experiences on
board trains:**

**Facilities &
services**

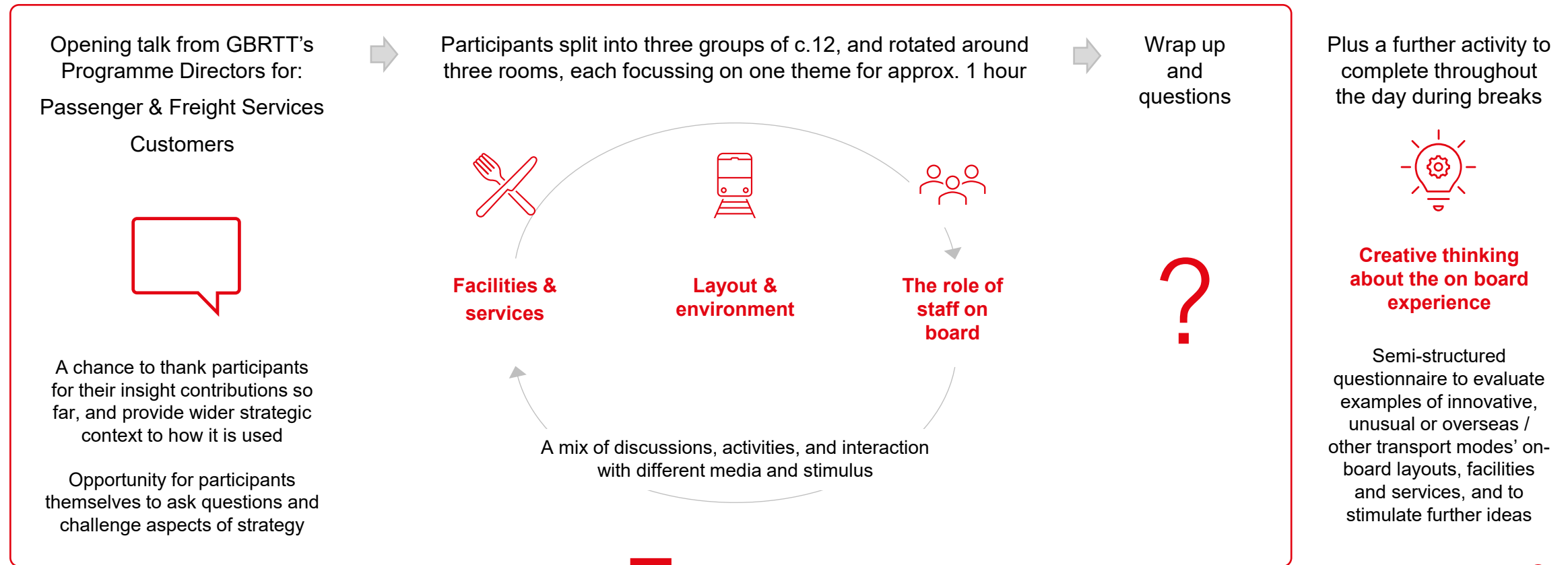
**Layout &
environment**

**The role
of staff**



The workshop: a chance to engage face to face with the community, and hear richer discussion around customer needs to complement their online feedback

....and they worked hard!



This report looks at what participants told us about **facilities and services on board trains**

Understanding customer experiences and needs for on board facilities and services: overview of approach

Workshop “warm-up”:

Activities in the online platform, one week before the workshop

On your most recent train journey, what was it like on board in terms of...

Catering

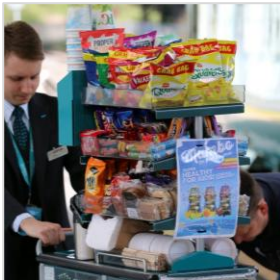
Toilets

Wi-fi?



Mini group discussions on experience and requirements for these facilities and services

Workshop activities and discussion

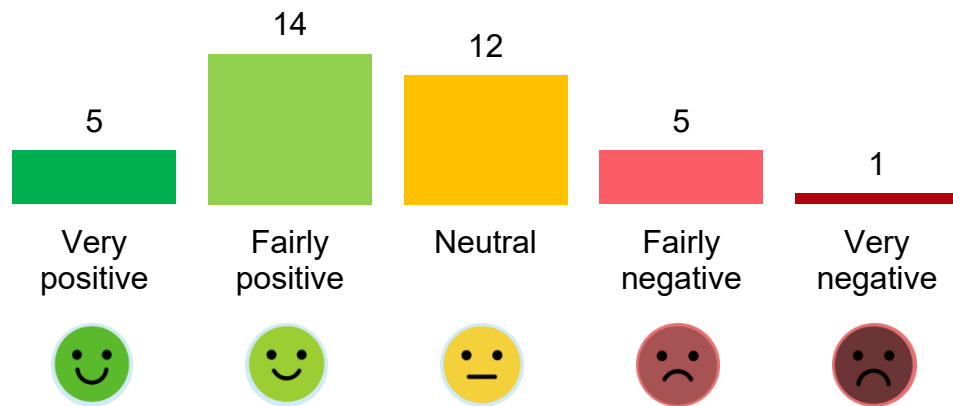


Evaluation of and response to various options for these facilities and services, from photo stimulus

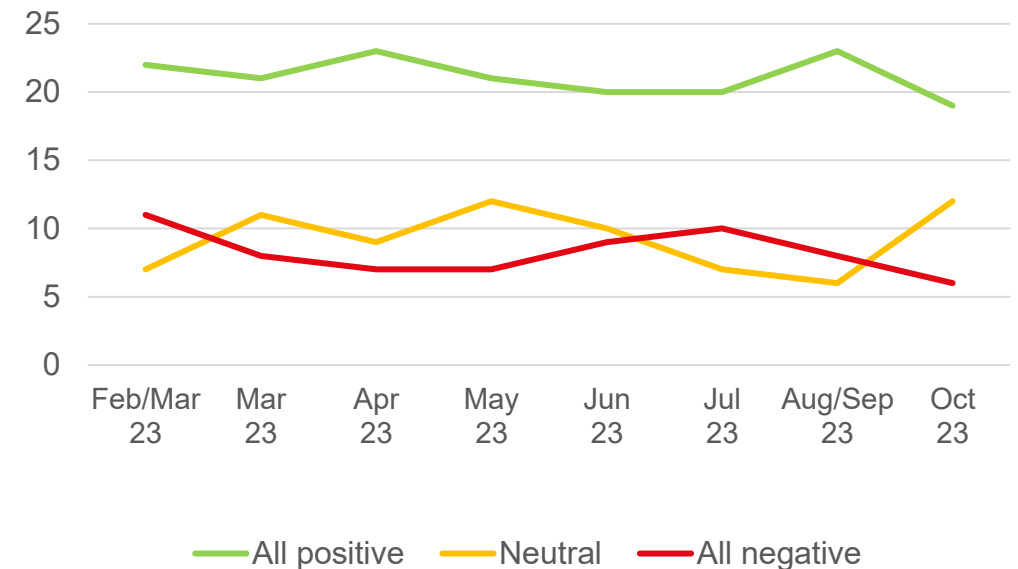
Using photo stimulus, menu options, wi-fi sign-in screen shots, etc.

Some context: most were feeling fairly positive or neutral about the railway in general at this point

How you feel about travelling by train at the moment: A snapshot
(Task 52, October 2023)



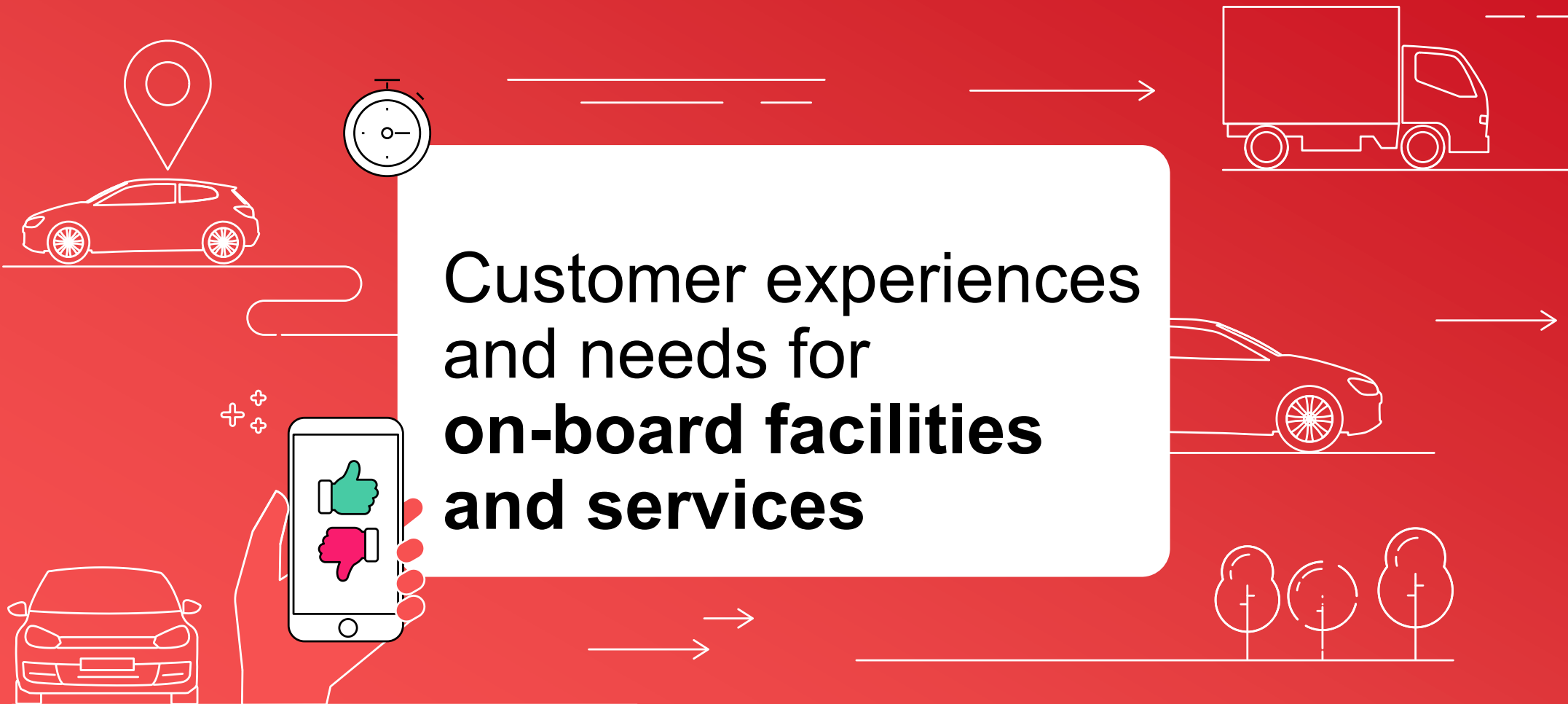
Trend so far



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, Oct 2023 (37); figures shown are absolute number of people



Customer experiences and needs for **on-board facilities and services**

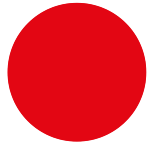
Wi-fi and especially toilets are felt to be essential on board trains; catering a lower priority for rail users overall

Relative importance of these three on-board facilities and services

Bubble sizes provide a qualitative indication of the relative importance of each. This is partly based on the proportion of individuals who talked about each, as part of the pre-workshop warm-up activity – either to comment on their presence / absence, their quality, or something else – and partly on their more detailed discussions in the workshop itself



Toilets



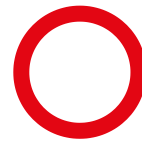
(With occasional exceptions) most expect toilets to be **on all trains, just in case needed**

For some people, toilets **can be a deal-breaker** on whether or not they want to or can travel

*....there were toilets but I did not need them. [But] for a long journey I think they are a must and I would definitely use them.
(Julie, leisure, urban)*



Wi-fi



Feels **out of step with everyday life not to be present** in all public spaces

(But ultimately does not impact decision to travel or not)

*I expect there to be Wi-fi on every train even though I do not use it endlessly on a journey. When I need it, I need it ... especially when it is a journey for work.
(Riz, leisure, suburban)*



Catering



Largely a non-essential (in many cases) **nice to have**, and with barriers to usage

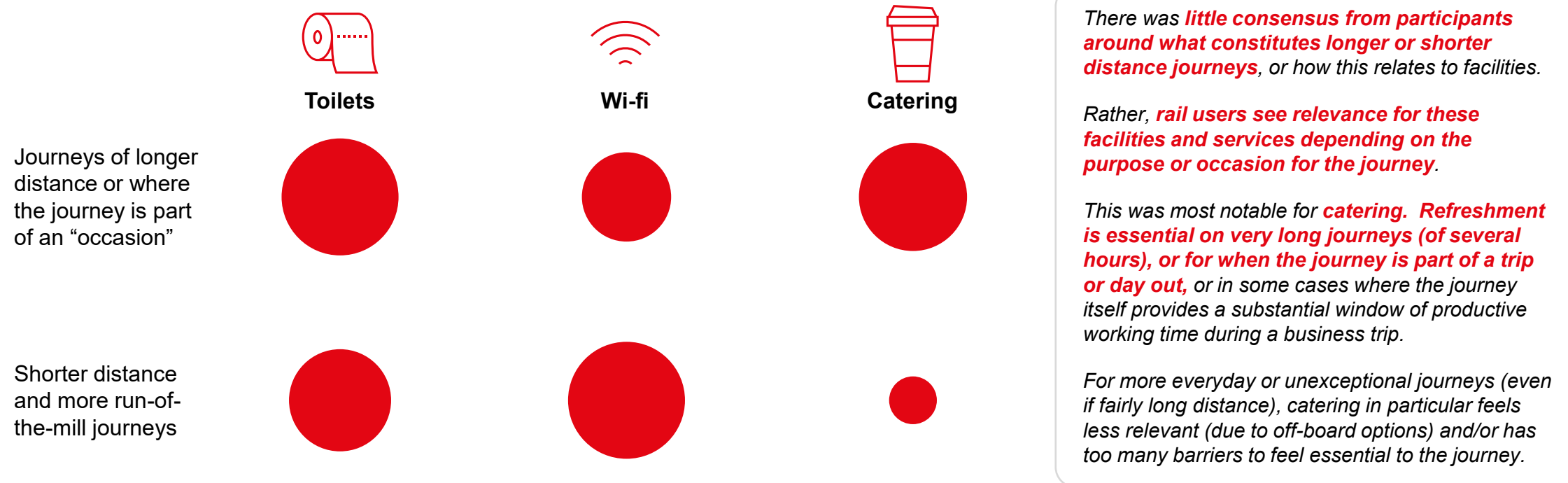
*I didn't see any catering on board. This would have been nice to have gotten a drink but luckily I ate just before getting the train.
(Michelle, leisure, urban)*

This is despite some journeys potentially being shorter than some London Underground trips for example, where there is more acceptance that toilets will not be present. This is partly about wanting more consistency across the "National Rail" network, and partly because these rail users drew a mental distinction between the types of passengers and types of journeys on Underground trains, and an acceptance that they would plan around and / or not need toilet facilities during such a journey

This varies by journey context: toilets and wi-fi seen as necessities in most scenarios; having the option of on-board refreshment does matter on “occasion” journeys

Relative importance of these three on-board facilities and services

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The role of facilities and services from customers' perspective



Toilets



Wi-fi



Catering

Principal need / attitude, most common role

As a basic courtesy and acknowledgement of human needs

A fundamental in everyday life

For productive or enjoyable use of the time

(Likely to be more significant given post-Covid decline in business travel, meaning when people do travel for business, journey time itself must really count)

To compensate for weaker phone signal points

(Counter to the fact that wi-fi might depend on mobile phone connections. There is little understanding, nor tolerance, of external factors which might affect wi-fi)

To refresh / refuel on longer (door to door) journeys: more of a necessity

Including where this involves an interchange (between train and any other modes of transport) with insufficient time or facilities to do so at the station(s)

Less frequently relevant, but equally important role

For specific customer groups

- *Younger children*
- *People with some medical conditions*

A growing expectation to facilitate use of electronic tickets and access rail service information

To enhance a journey that is part of a day out or an occasion: a functional luxury

Additional roles

During disruption or in emergencies

- *If train is delayed or slowed, or people cannot get off when they expected to*
- *If other trains have been disrupted, meaning plans have changed and passengers are / have been more limited in opportunity to use off-board facilities*

During disruption or emergency

To mitigate impact on passengers and provide some comfort and / or acknowledgement of inconvenience

“

If I was on a five-hour journey and heard beforehand that there wasn't going to be catering, I would take my own [food]. If I heard there wasn't going to be a toilet, I would not travel.

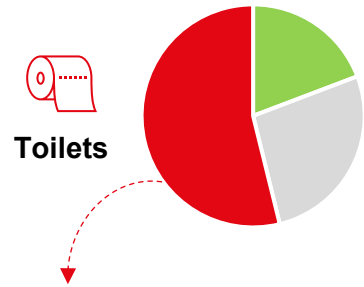
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Workshop participant, long distance leisure journey

There are examples of good experience, but current overall opinion of these on-board services are more often negative – especially for wi-fi

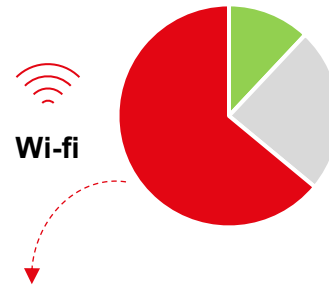
Overview of top-of-mind sentiment towards on-board facilities and services

This research is not a robust, quantitative evaluation of the quality of each of these services based on verified experiences. Rather, participants' feedback provides a qualitative understanding of how they perceive and remember these services to be at the overall, industry level. Graphs here provide a visual, overview indication of what proportion of all the feedback was positive, negative, or mixed / neutral, rather than a fully quantified assessment.



Poor perceptions of **cleanliness** – often confirmed in practice (albeit not always)

Inconsistency of availability and access

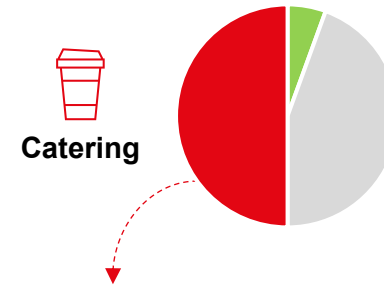


Inconsistency of availability

Sometimes **apparently not working at all**, despite being advertised

Insufficient or patchy in terms of **speed / capacity**

...all feeling **unacceptable “in this day and age”**



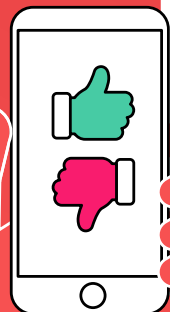
Provision and availability perceived as **unreliable and inconsistent**

Perceived and / or known to be **poor value for money**

Offer found to be **limited and predictably unhealthy / insubstantial**

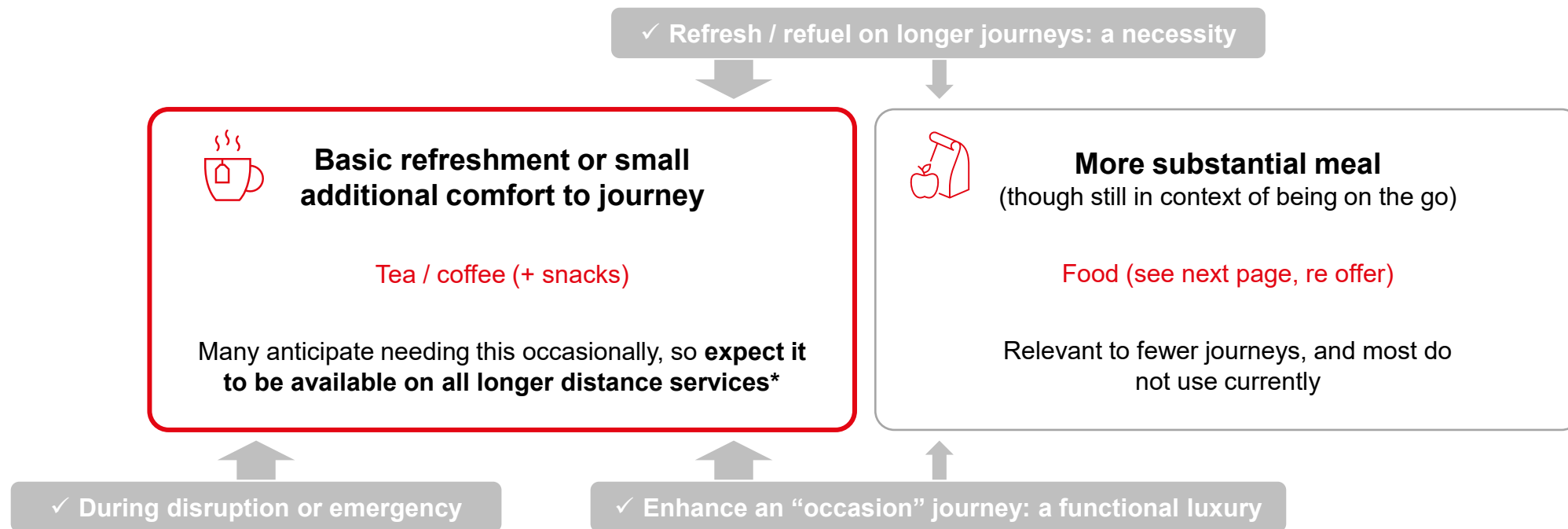
- Largely positive experience or perception
- Mixed experiences / perception, or neutral
- Largely negative experiences or perception

More detail given on the following pages...



More detail on the
feedback around
on-board catering

Across the key roles for on-board catering, the offer itself falls into two distinct categories, with a basic drinks provision having more frequent relevance



Both can either be a “functional luxury” or more of a necessity, depending on circumstances – though the latter is more common and more widely relevant

Barriers and issues exist and are similar for both categories, but are greatest for current food / meal offerings (see next page →)

**There is little consensus around the definition of “longer distance” services, but workshop discussions generally implied that the types of services where catering is currently offered (aside from issues with inconsistency and reliability) are the right ones*

There are three barriers and issues with the current offer, preventing customers from using it and / or diminishing the experience when they do so

In light of these, most say they plan ahead to bring their own, or rely on station food & drink options

1 Reliability

Primary issue

Disappointment is common: many have been let down when an expected / advertised on-board catering does not materialise

Rail users have come to expect unpredictability, including by operator, time of day, from one day to the next, and by stage in the journey

...but they find this hard to understand, e.g.:

- excuses for catering being out of operation often seem poor (lack of staff, stock, hot water, etc.)
- logistical issues with stock are perceived as easily fixed (i.e. operators “should know” where and when restocking points might be needed en route)

Note: at worst, this lack of reliability in catering only confirms wider perceptions of inconsistency and unreliability in rail more generally

2 Price

Similarly prominent to #1, but not insurmountable

Customers know they are a captive audience and so know from experience – or assume – that **operators inflate prices** when on board

Given that most occasions where drinks and / or food are desired on board are about functional sustenance or refreshment, price is important: for most people, most of the time, **on board catering is not about enjoying a nice meal, it's more practical**

In this context, **affordability is usually not the issue.** Rather, the perception that prices are high is more often linked to **proportionality within the trip** as a whole, and **willingness to pay** given the setting and purpose of the food and drink.

3 The offer

Important but less salient

For many the **on-board food** range is generally too limited and **not healthy / substantial enough:** this in the context that when needed in its own right (i.e. not simply alongside a coffee), on-board food is a functional meal, not a treat.

By implication, **current drinks offerings are fit for purpose.**

Bear in mind that we know consumers sometimes say they want healthy options, but don't choose them in practice. Nevertheless, more choice including more substance and more fresh food (providing customers are made aware of it) would be worthwhile to trial

Specifically, workshop discussions focussed on range and options rather than quality – partly because experience of catering is quite low and so relatively few can comment on quality

Discussions indicated that rail users are likely to be happy with a catering offer that varies by time of day (e.g. to accommodate their needs for basic refreshment vs. meals in a practical way), and perhaps which is more streamlined overall. **Their priority is for a fairly priced, consistent and reliable offering across relevant train services.** Once this is the case and is bedded in with customers, further enhancements to catering provision might be considered...

Once a fairly priced, reliable and consistent food & drink offer is in place, further **optimisations might enhance its appeal, but are not priorities** for customers

Other aspects of catering provision were discussed in the workshops, but garnered less interest among participants, and came with their general caveat of “don’t run before you can walk”

Branded items



LEON

- Clear benefit is certainty around product. However, overall there is little preference either for or against – **presence or absence of branded items is unlikely to affect passengers’ likelihood to consider**
- But comes with cynicism that the price will be higher on board than for the same product elsewhere, and use of brands can therefore draw attention to and trigger this suspicion

Options for order and fulfilment



Menu formats / styles: no strong preferences, and not a priority topic for participants in the discussions



Food & drink access, ordering and fulfilment methods

- Again, **no very strong consensus on preferences** between trolley vs walk-up carriage vs delivered to seat, as this is not the priority for customers in respect of catering on board
- Nevertheless, **options enabling people to stay seated have acknowledged advantages** for those with reduced mobility or concerned about security of their belongings (or companions), or risk of losing their seat
- ...Ordering remotely e.g. via app / QR code is attractive for some as an extension of this, but can feel exclusive (to those less familiar with the technology) and/or detached, with some wanting human interaction or, at least, human acknowledgement of an order
- Pre-booking felt to be a nice idea, with precedent in air travel, but raises questions about how it would work in practice, with too many risks (e.g. delays to the train, problems with seat reservation, etc.) to be worthwhile
- Some appeal for on-board vending machines, though concerns around stock maintenance



Instead, alongside establishing a solid food & drink offer, information that **enables customers to use it effectively will be important**



Customers want information...

- ✓ at the **point of booking**
- ✓ about **whether catering will be present** or not, and what the order/delivery set up will be
- ✓ and **what products will be on offer**

They also wanted to be informed about any changes to this, well before boarding, in order to buy or bring food and drink from elsewhere if needed

...However, the desired timing of such information (alongside other alerts about the status of the train itself and any other service updates such as toilets being in or out of order) was more individual: ideally, many customers interested in this information would sign up and tailor which information, on chosen service / facilities updates, they receive

““

I did think it was quite poor that for such a long journey ...The only offerings were crisps / flapjacks and chocolate. A sandwich would have been great. [Next time] I will take my own packed lunch for fear of disappointment

Marie, leisure, suburban

””

““

There was catering but this was abandoned once passengers were forced to stand in the aisle

Mark, leisure, suburban

””

““

There was onboard catering which was announced when the train was on its journey: sandwiches, cakes, snacks, soft drinks, but no hot drinks available

Anne, leisure, urban

””

““

I've been disappointed in the last year or so that there hasn't seemed to be much catering at all on trains I've been on, lots of catering carriages that were closed, but not much else.

Becca, business, suburban

””

(Feedback for a number of topics indicated that **First Class may have had its day** on most types of train service)



Participants in this community rarely use First Class and question its relevance

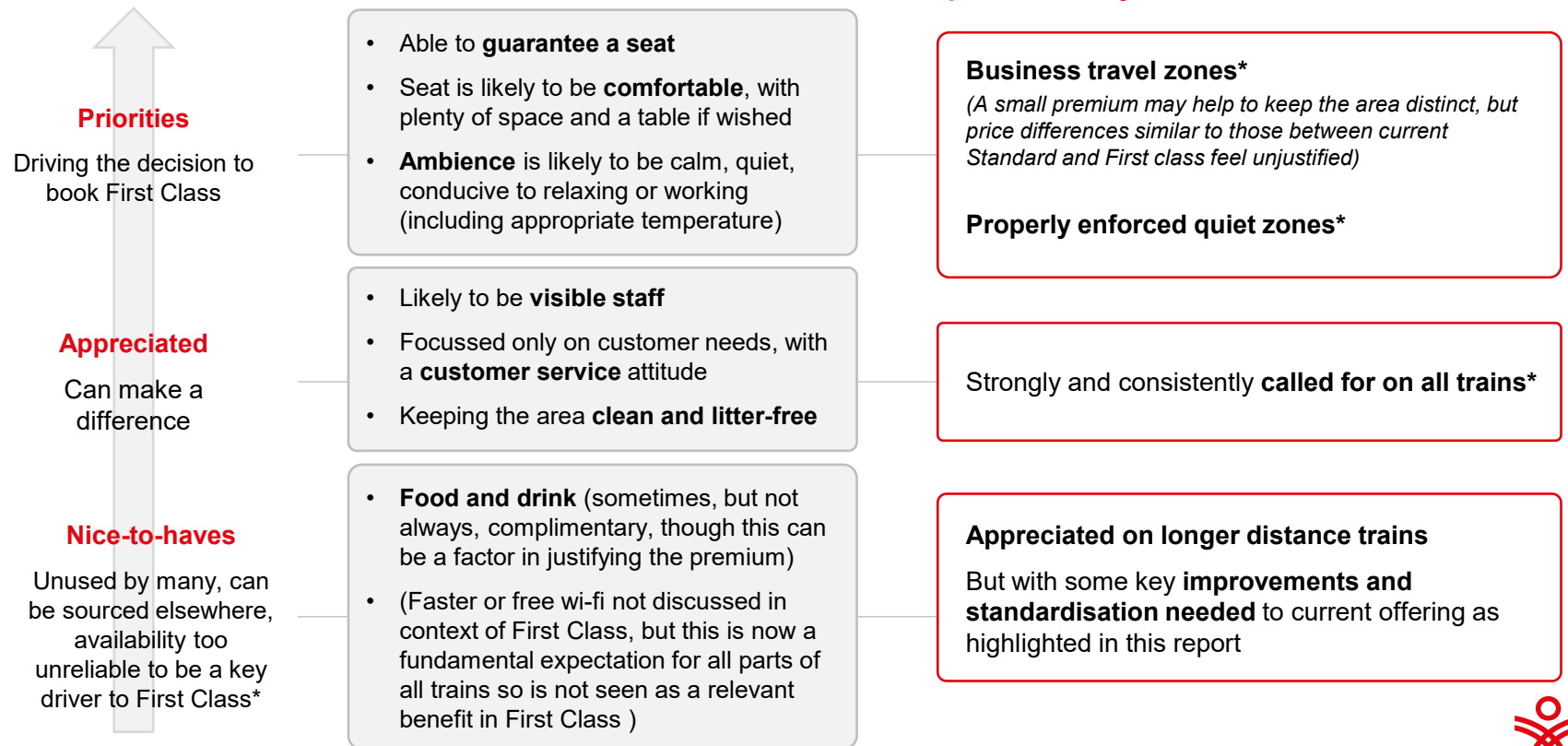
When they do, it is **appreciated and enjoyed**

...but it is commonly entered into as a **novelty**, often where a cheaper ticket has been secured, and with little intention of repeating it often

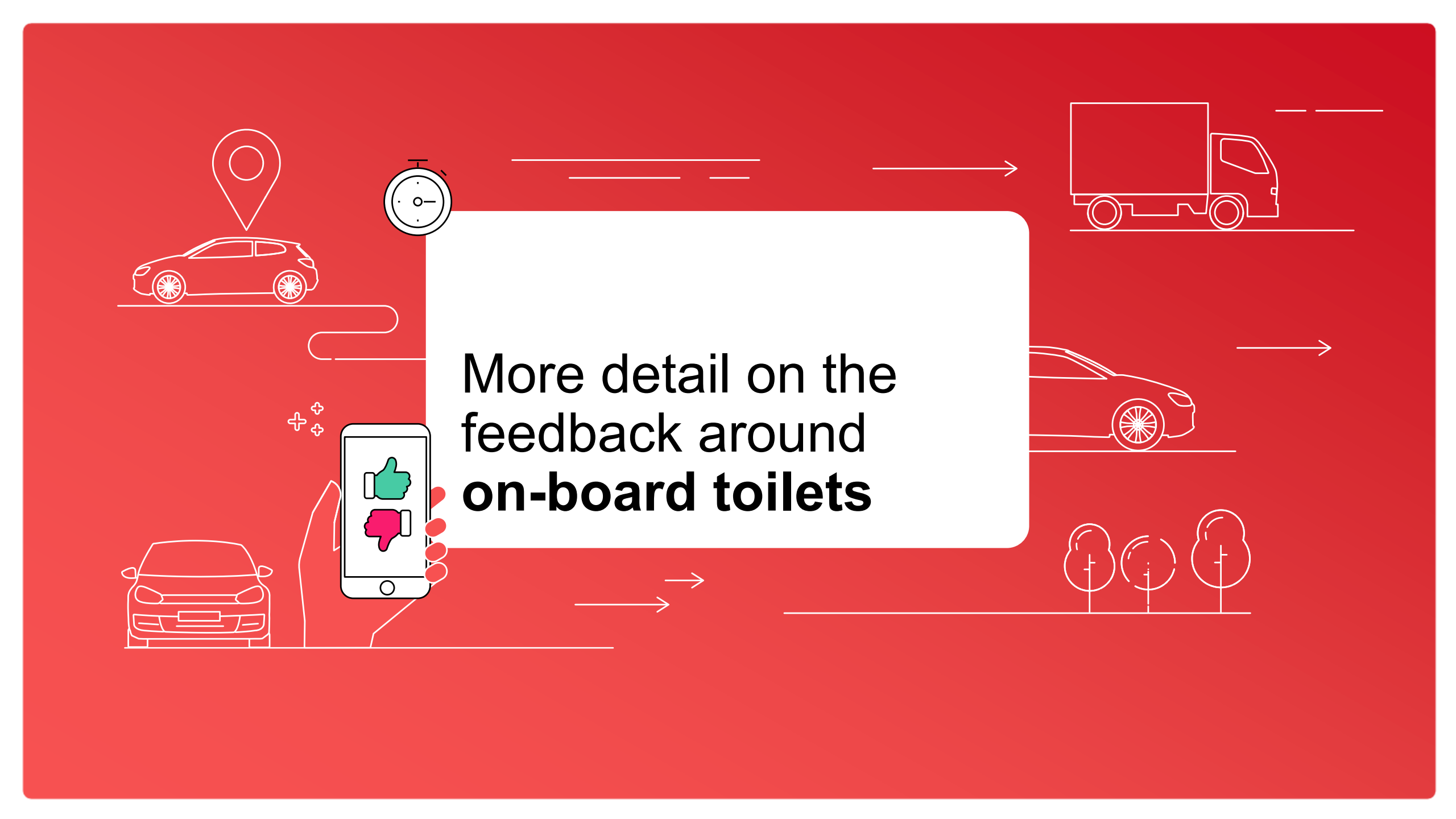
For most, **drawbacks of First Class outweigh potential benefits**

- Seen as **outdated and elitist**
- Big on-board priorities for customers are having sufficient seating capacity, and visible, accessible staff – First Class is seen as **turning these fundamentals into a luxury**, which feels unacceptable

When people do book First Class, the factors in this decision are typically:



* See more in separate reports on staff and the space on board, more generally



More detail on the
feedback around
on-board toilets

There are three main areas of concern around on-board toilet facilities

These issues can:

- × **Contribute to more widely-held negative perceptions** that the rail industry works from a logistics-first, rather than customer-first, mindset
- × **Tangibly affect journey enjoyment**, with many saying that they compromise comfort by going without this much-wanted facility, when it isn't (perceived as) fit for use
- × **Prevent travel** entirely, or materially reduce choices, for a minority

1 Cleanliness / maintenance

The dominant issue, directly and commonly leading to the perceptual and tangible outcomes above

Very strong and **widely-held belief that on-train toilets are unhygienic**, held as both:

- a perception without any experience at all
- and from experience... including where the toilet may or may not be genuinely clean but there is no evidence that it is: to customers, toilets are **guilty until proven innocent**

A number of factors contribute to this:

Practical

- Cubicle size: confinement = hard to avoid touching walls, surfaces, and closer proximity to everything heightens awareness of any litter, water drops, etc.
- Utilitarian look and feel
- Experience of non/poorly working taps, dryers, flush, or of depleted soap, paper, etc.
- Worsens during journey

Perceptions / attitudinal

- Direct comparisons made to station toilets: more spacious, often in multiples, and cleaning sometimes visible in practice
- Heightened sensitivity to hygiene post Covid, together with a perception (and reality) that higher cleaning standards from that time have not been sustained consistently, nationwide

2 Accessibility

Less common but directly affecting ability to use

Toilets have been seen to be:

- Out of order
- Obstructed, with luggage for example
- Difficult to reach, or where users feel self-conscious due to others standing nearby when trains are crowded

3 Doors & locks

Less salient, affecting experience, but less likely to prevent usage

Rail users commonly fear that electronic door locks will fail or that they will not engage them properly

Exacerbated by :

- Separate closing and locking buttons
- Toilet itself is beyond reach of the door
- Variability by rolling stock and by operator (and sometimes even within a single train)

Some of the factors and features of toilets which cause these concerns are difficult to change (such as size, and safety requirements for lock mechanisms), but **some tactical points could help**: visible or evidenced cleaning practice*, consideration for colours and surfaces look and feel, stringent maintenance and re-stocking

In addition, **more consistency across rolling stock and operators** would help create more familiarity and confidence with using toilets

Some further learning points around toilets provision: in particular, **information** can really help

(Not all toilets experiences are bad, and can be a pleasant surprise)

I normally use the toilets on board and I'm generally impressed with the cleanliness of them. It would really matter if there weren't easy to access clean toilets, I think that's really crucial no matter what length of journey it is
(Becca, business, suburban)

On most journeys, I find the toilets clean and in working order. The toilets on [TOC] are usually better than I would expect - clean, spacious, comfortable.
(John, business, rural)

It can really make a difference to journeys when toilets are working and pleasant:

Consider allaying fears about toilet cleanliness, and giving passengers positive information about it, via pre-journey information and potentially wider comms. Might this encourage more people to take advantage of facilities when they are genuinely fit for purpose, and therefore to enjoy their journey more?

Examples of specific (existing or suggested) features which are popular or appreciated:



Non-touch amenities within the cubicle, including flush button, taps, soap, hand-dryers

Note that non-touch amenities are not entirely without some issues: they can be harder to find, especially for visually-impaired people, albeit that Braille is often present to assist; and not being visible can reinforce fears of not being in working order. However, these are usually smaller issues which are overcome after an initial use



Signage indicating the location and current availability of toilets (particular appreciation for style in new Greater Anglia stock)

Announcements on toilet location also useful, though a balance is needed so as not to be too frequent



Information and facility to book a seat close to an (accessible) toilet if wished

Information at point of booking, and again in advance of the journey, on whether toilets are present and in working order, with the option to change plans without penalty, if having no working toilet makes a material difference

““

The toilets were nasty the last time I used them on a train. I find the train toilets so tiny so you end up touching everything and it looks and feels very germy.

Barbara, business, urban

””

““

The toilet door was broken so I couldn't use the toilet as people were crammed in the hallway outside the toilet door.

Caleb, leisure, suburban

””

““

Toilets are hit or miss. Very clean and pleasant sometimes, horrendous other times. There should be a way to notify someone if that is the case

Charles, commuter, suburban

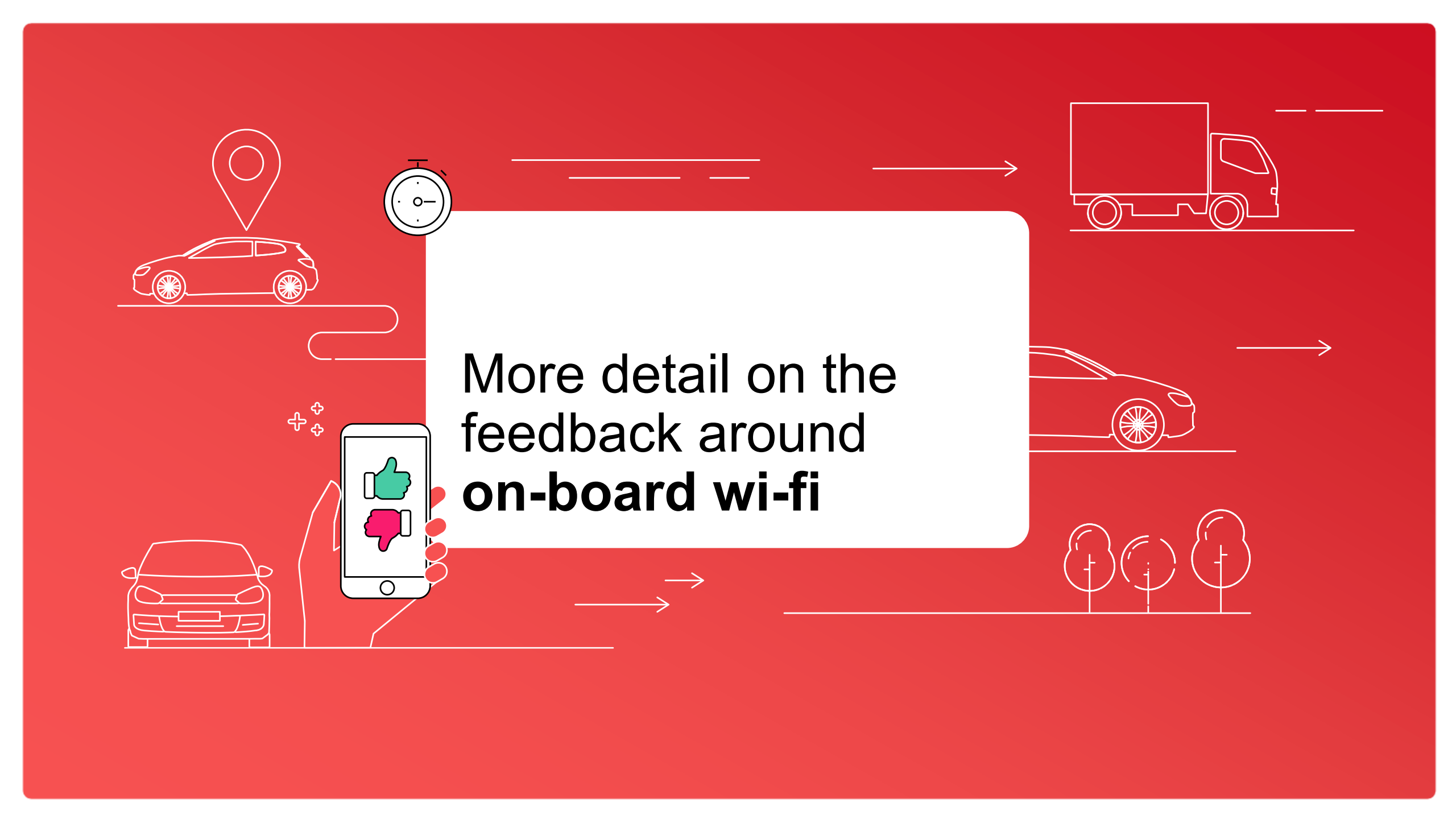
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““

I wouldn't use toilets on a train unless really desperate, I imagine they wouldn't be very nice... [However] I think it's important that trains have toilets for small children / people with health issues and emergencies more generally.

Rachel, business, rural

””



More detail on the
feedback around
on-board wi-fi

Feedback about on-board wi-fi was very straightforward

Now a **fundamental expectation**, like toilets

(Some don't have strong opinions about wi-fi, but for the majority to whom this does matter, it is very important)

Although unlike toilets, a lack of (reliable) wi-fi doesn't influence the decision to travel, but it can diminish journey experience, and overall impressions of an operator / the industry



Wi-fi is **frequently found to be absent** (even where advertised) and **too weak or inconsistent to be useful** (and even where it is better quality, there is an expectation that it can't be relied upon)



To facilitate working time

(And it is likely that this has become even more critical, given overall decline in business travel since Covid, meaning that when people do travel for work reasons, the time spent on the journey itself needs to really count)



For enjoyable or productive time on board



To fit with the way people access and use information and tickets

There is **some acceptance that, in a moving vehicle, wi-fi (and mobile phone) connection will be variable**, and understanding more about how the wi-fi is provided can appease frustration a little

....but:



this doesn't help in practice



and feedback implies that such **tolerance for patchy connection is waning**, as more of everyday life moves online and in context that other public spaces and modes of transport (especially buses and aeroplanes) increasingly provide wi-fi

Investing in wi-fi provision feels like a clear priority, on all types of train stock and services but especially longer distance trains, and services used heavily by commuters.

There may be some appetite from customers to pay a small amount extra for very good, reliable internet connection on longer journeys, where this is a very marginal cost and where it truly guarantees a better service.

““

Wi-fi is unfortunately really poor on board, and I can't use it at all. It is a really disappointing experience and feels a bit misleading when train companies say they provide wifi on board

Anna, commuter, suburban

””

““

Wi-fi on [TOC] is of very limited use... really not very good... Wifi should be worth logging into so that you can access websites (eg travel apps for updates whilst en route), not just email

Fiona, leisure, suburban

””

““

Wi-fi ...is ALWAYS bad ...more often than not I switch to data to get what I need, done. Even then it's unreliable ...it baffles me ...in this day and age ...it's a major commuter belt and I'm sure they should do better

Joshua, commuter & business, rural

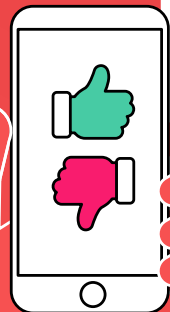
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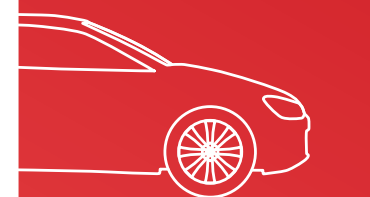
The wi-fi was essentially unusable for most of the journey, and when it did work it didn't have enough strength to watch videos online - which was essential for the work I was doing on my commute.

Mike, leisure & business, urban

””



Final thoughts & summary



Many do genuinely experience poor on-board facilities in practice, but there is also a **perception problem with on-board services** which is sometimes undeserved – especially for toilets



Common perception



Toilets

I do not use the toilets on trains because I generally avoid public toilets. I do not regard them as clean.
(Riz, leisure, urban)



Catering

My biggest complaint has always been the prices ...passengers for years have been getting ripped off with inflated prices on trains.
(Rob, leisure, suburban)



Wi-fi

Wi-fi [I have] not tried, but for the past couple of years has been limited to small quotas, even just for web browsing.
(Oliver, business, suburban)



Reality for some

I normally use the toilets on board and I'm generally impressed with the cleanliness of them.
(Becca, business, suburban)

The train outward and return usually have onboard catering. Outwards from Bath to London it has a good trolley service
(Clive, business, rural)

...it's really useful when I get past Five Ways as my signal dies as we head underground. It's only for a few minutes, but allows me to keep browsing or sending emails while I'm waiting for the train to go.
(Stuart, commuter, suburban)



While of course operators must work hard to deliver better in practice, the industry (and passengers themselves) may also benefit from challenging unwarranted perceptions.

This could involve, for example:

✓ Drawing attention to the positives:

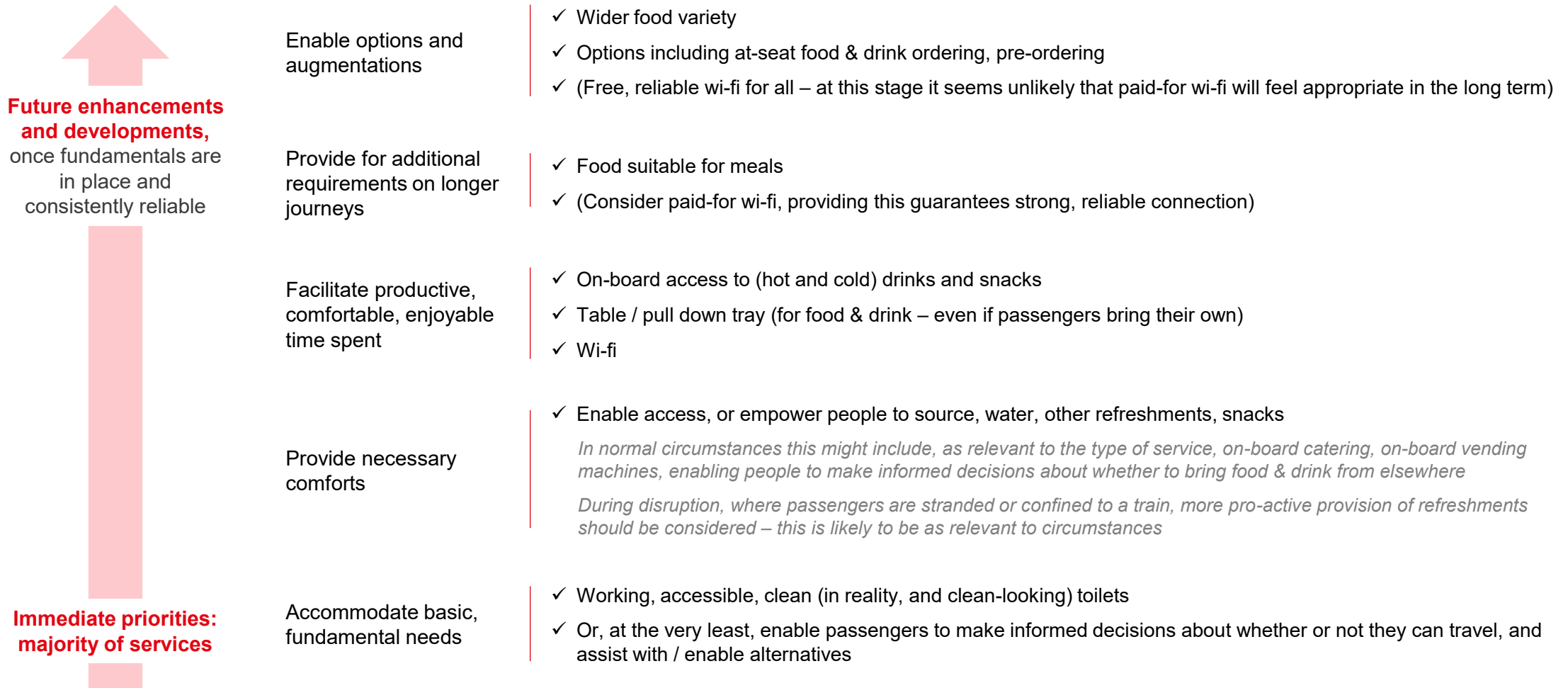
- Making it clear which services are available on which trains
- Demonstrating / communicating the quality to provide reassurance that there is some care being taken (e.g. overview of cleaning practices, overview of how and when catering is restocked, etc.)

✓ Managing expectations: Providing advance information on when these services may be limited or out of operation

✓ Being fair to customers when out of order services may impact on their ability to make the journey as they intended (or in some cases at all): consider providing compensation, alternative travel without penalty (currently people don't know if this is possible or not).

Rail users need to be able to believe and rely on the fact that the default will be that their expected facility or service will be fully operational to a good standard – rather than the reverse which is often the case currently

On-board services and facilities: a hierarchy of priorities



Summary: facilities and services on board



Toilets

Felt to be essential on all trains

- Not being available, or not being fit for use, can influence whether or not people are comfortable to travel, or able to travel
- Negative expectations of hygiene also lead people to sacrifice comfort when they might have chosen to use the toilets if they trusted them

Impressions are largely negative, seen as dirty and poorly maintained. Some of this is perception rather than reality, but despite some good experiences, any poor examples can reinforce what are deep-rooted, widely held overall beliefs



Wi-fi

Felt to be essential, on all trains, by many: not everyone needs or uses it, but those who want to see it as a fundamental expectation

- Not being available, or not being fit for purpose, does not impact on the decision to travel, but can be a significant inconvenience and can reinforce existing negative perceptions of the industry's commitment to customer needs, and feels out of date

Experience is more consistently negative than for the other services covered here, with **inconsistency in whether or not it is available, and poor reliability** where it is provided... both of which are **at odds with expectations for modern, everyday life in other public spaces**



Catering

The role and **necessity for catering is more mixed:**

- People making more regular, familiar (often shorter) journeys have relatively little need
- Those making more “occasional” and special journeys (which are often longer – but this might include short journeys on a given train line within a multi-leg, multi-modal trip), OR those making longer journeys more generally, want options for drinks and snacks
- Where this overlaps mealtimes there is greater expectation for more substantial, functional food offerings

Impressions are largely negative, though usage is low: reliability of being available and/or fully stocked, and the perception of **inflated prices** means people often see on-board catering as a back-up but prefer to source their own food. Expectations for **limited, insubstantial, non-fresh food** also puts people off.

In response to all of this, rail users want the industry to be more consistent, in what is delivered, in what form, and to what standard. Crucially, they also want to be informed and empowered to take action in response to knowing what is and is not available.

Additional communication around what is available and how it is provided and maintained, is also likely to go some way to breaking down perception barriers, giving passengers themselves more choice and comfort, and potentially improving broader impressions of the railway more generally

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.