

Shaping Rail's Future: Customer Community

Report: Nov 2023

Workshop: the on-board experience
Staff on board



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

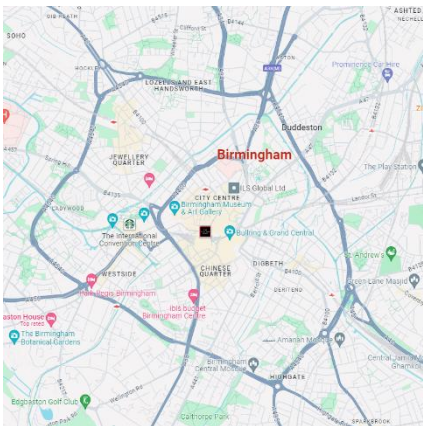
In addition, two face to face workshops to discuss topics further, generate ideas, and feed back on proposed concepts and solutions



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**

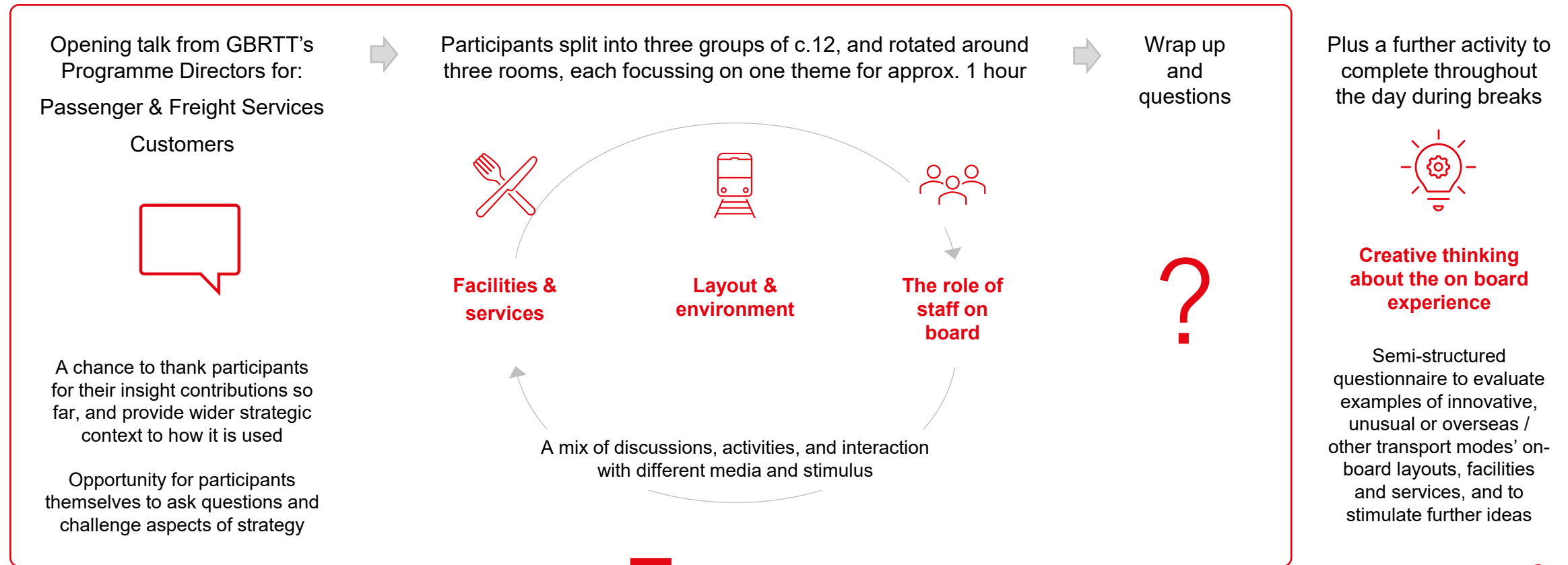
**Layout &
environment**

**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!

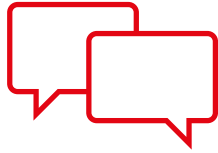


This report looks at what participants told us about **staff on board trains**

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

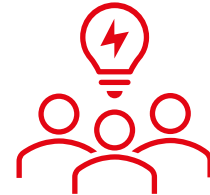
Workshop “warm-up”:

Activities in the online platform, one week before the workshop



On your most recent train journey, how did you find any staff?

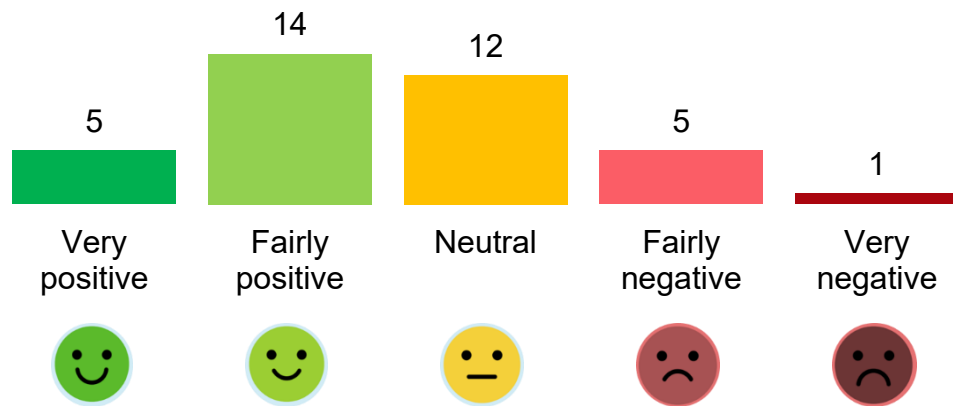
Workshop activities and discussion



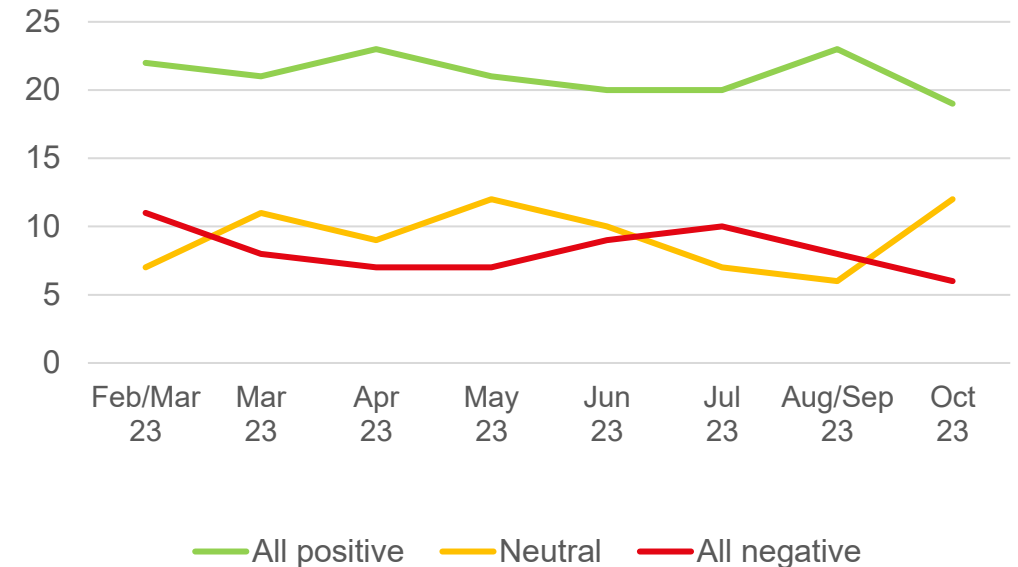
Mini group discussions on experience with and requirements for staff on board trains

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)



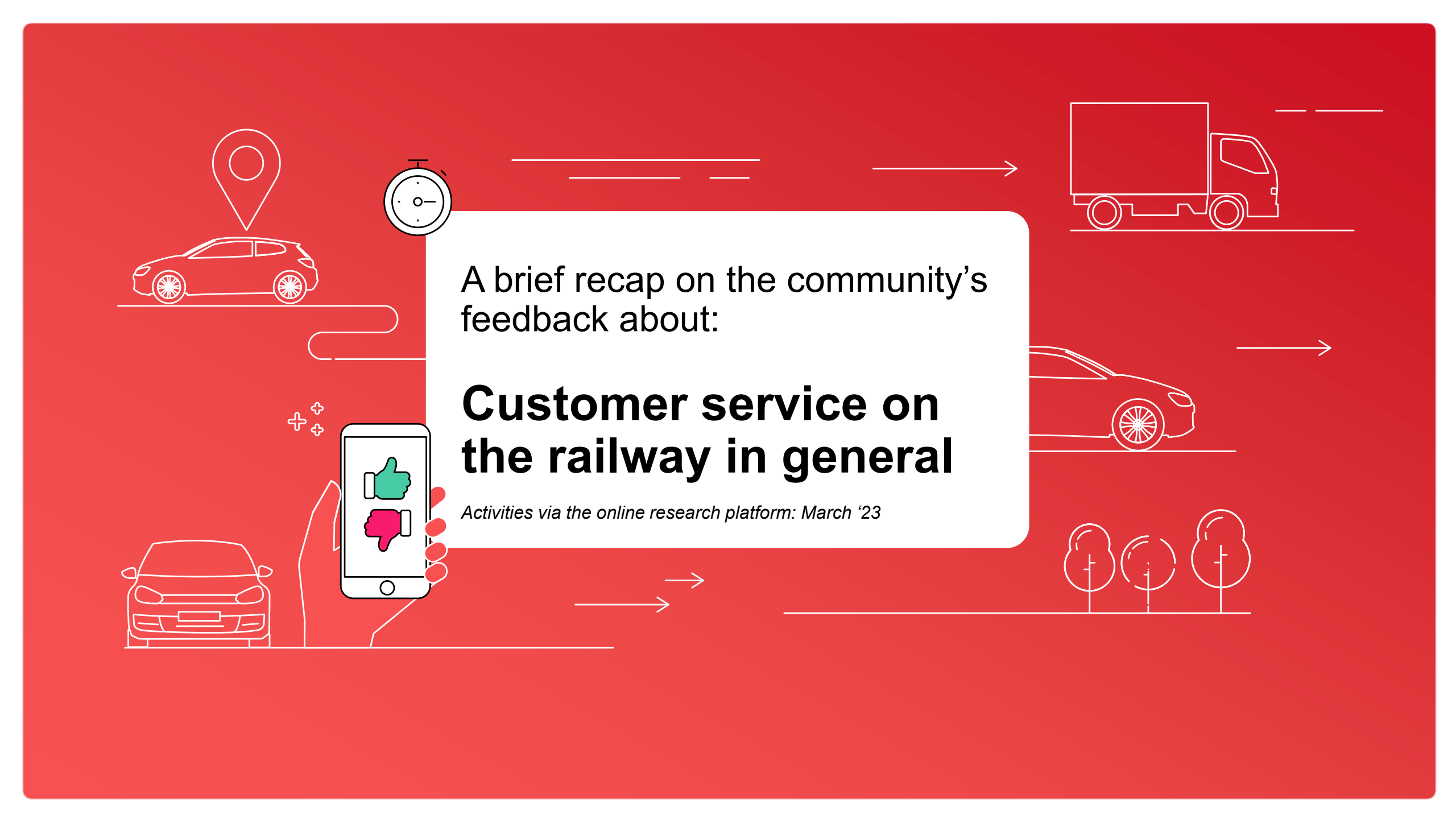
Trend so far



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



A brief recap on the community's
feedback about:

Customer service on the railway in general

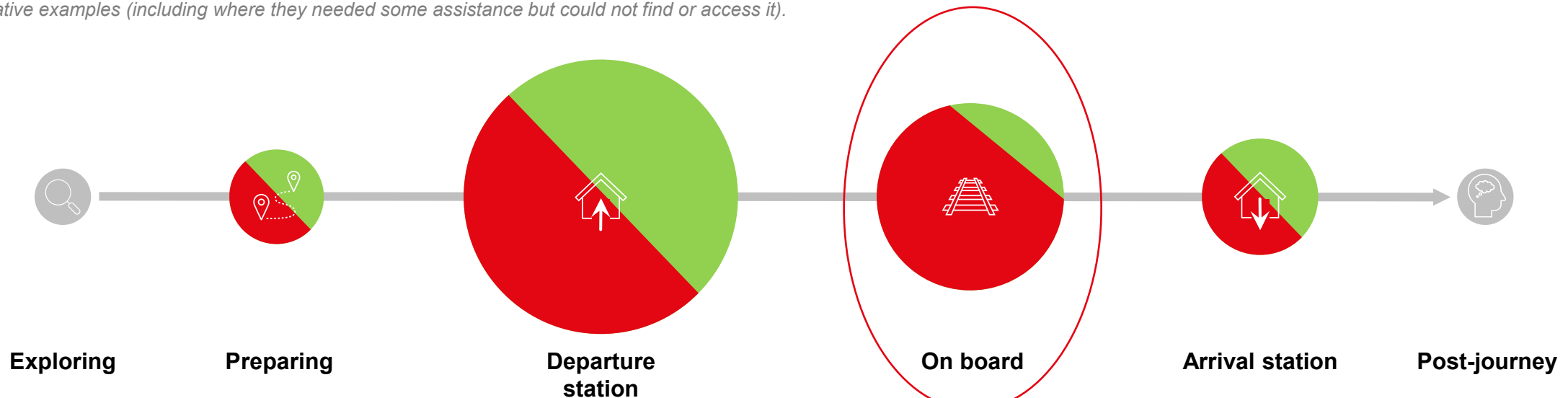
Activities via the online research platform: March '23

Earlier in 2023 the community fed back that **on board customer service** is an important part of overall railway experience – but that its **quality is very mixed**, largely due to a lack of visible staff

In March 2023, the community talked through the customer service interactions they had – or would have liked to have had – through the course of a real, end to end, recent journey.

*Bubble sizes are a qualitative indication of the relative importance of customer service to passengers (regardless of how it was delivered, i.e. face to face, contact centre, other touchpoints) at key journey stages. **Customer service is most wanted, appreciated – and missed – at stations; it is also important on board, and delivery here is currently not rated consistently well***

“Traffic light” colours provide a qualitative indication of how often the community described positive examples of customer service they received at different stages of a journey, compared to more negative examples (including where they needed some assistance but could not find or access it).



One of the biggest factors in negative impressions of on-board customer service was simply **a lack of staff presence**, rather than the way staff act and the roles they perform (though this was not without criticism in places)

Their feedback also helped to identify key principles, to be consciously embedded in three central ways, in order to provide good customer service:



Structural / systematic

How things are set up within the industry to facilitate customer interaction

- ✓ **Consistency** across and within TOCs – so customers know what to expect, from whom, where to go
- ✓ **Staff given space and agency** to be empathetic, pro-active and effective
- ✓ **Ensuring customers know what customer service and information resources are available** – to avoid being passed around or wasting time looking for information, and to avoid a feeling of being left in the dark about service status



Practical considerations for staff roles & responsibilities

What staff do

- ✓ **More visible, easy to find and access, face to face staff**
 - As often as possible, especially at stations, but important on board too
 - Ticket offices & gate staff as a minimum, plus info/help desks and roamers
 - Clear, customer-service appropriate uniforms
- ✓ **Widened responsibility of any customer-facing staff**, especially ticket gates staff, dispatchers, on-board catering staff (all staff are “game”)
- ✓ **Ensuring staff have knowledge to be able to help** (via training, live comms channels when on site, tools like tablets, etc.):
 - With everyday queries
 -and strong, clear contingency plans for customer service during disruption
 - ...and in relation to other TOCs and even onward transport
- ✓ **Clear, customer-relevant, pro-active information** via written channels, announcements, individual staff interactions

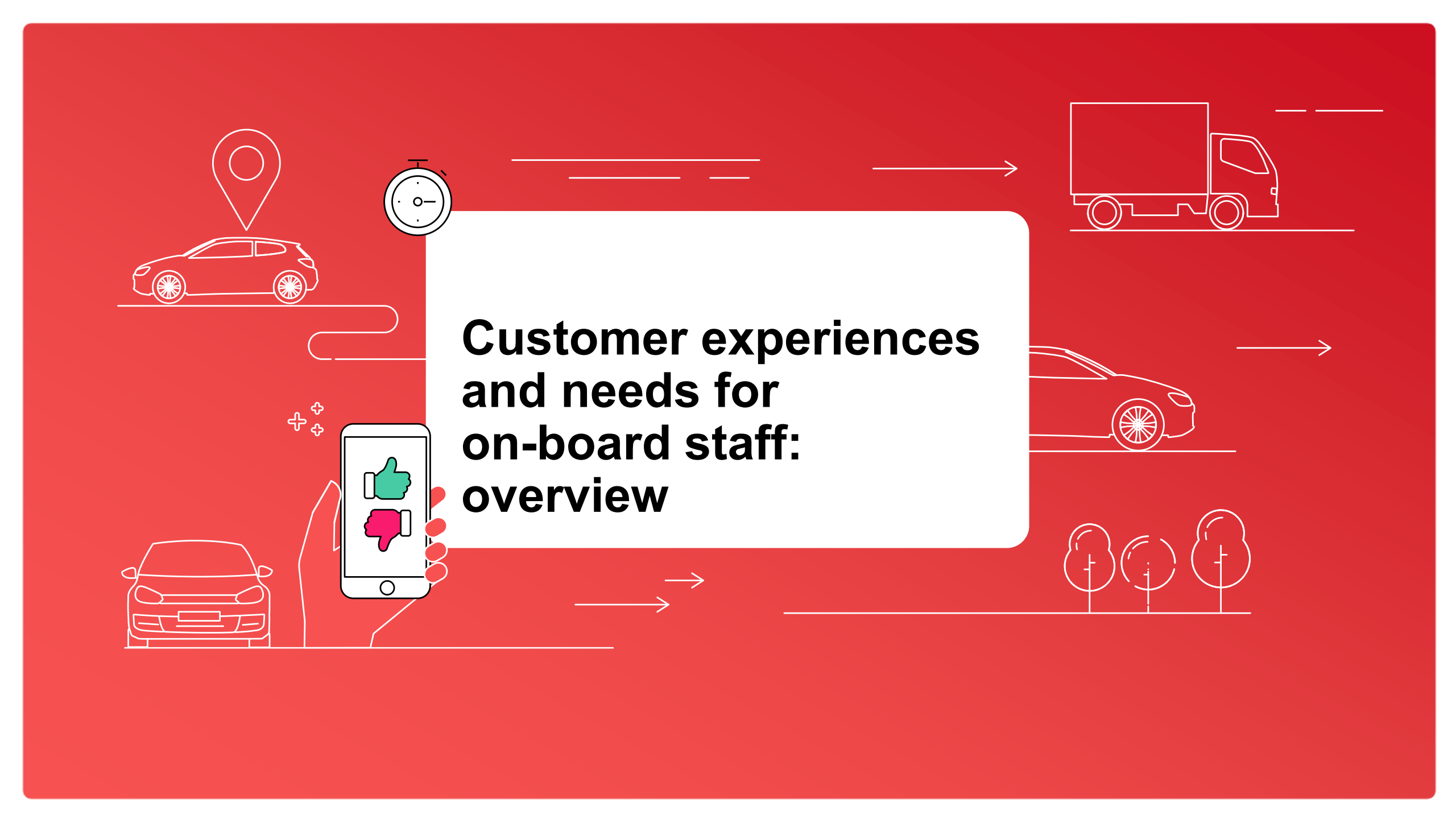


Attitudinal

How they do it

- ✓ **Open, approachable** (consider body language and positioning around stations, as well as personal attitudes)
- ✓ (Actively) **empathetic**, patient
- ✓ **Pro-active**
- ✓ **Pleasant** / friendly / personable
- ✓ **Straightforward**, efficient, no quibbles
- ✓ **Honest**, transparent

...and these principles need to be extended across remote customer touchpoints, as well as for front line staff



Customer experiences and needs for on-board staff: overview

Workshop discussions and pre-tasks further confirmed the significance of staff in shaping the overall on-board experience



Staff really do make or break the experience of travelling by train



Multiple workshop participants



A fundamental principle in the way passengers want the railway to be run, and to improve, is to truly become **a service for facilitating people's journeys, rather than a logistics industry.**

Underpinning all of the community's feedback during their year of engagement so far, is **a need for a more genuinely customer-first mindset**



Having a human interaction between the operator and passengers is a crucial element in this: customers feel strongly that they want a genuine acknowledgement of their existence from the operator, in order to feel they are valued.

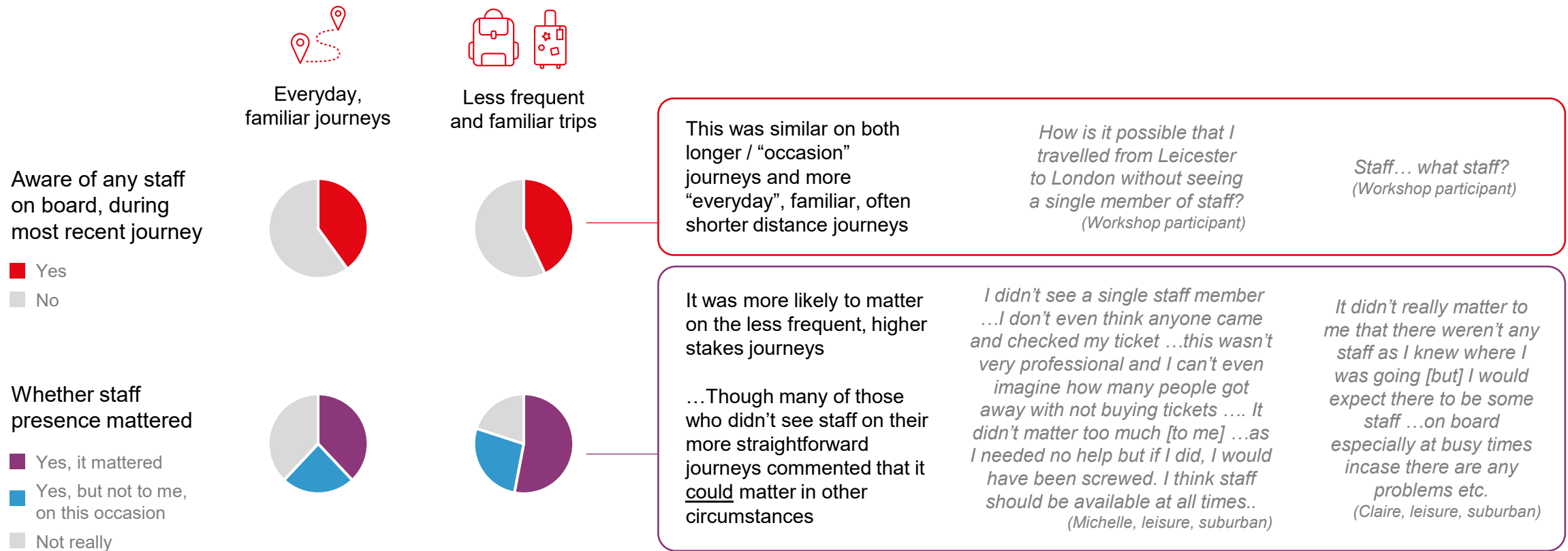
For most people, most of the time, seeing and being acknowledged by (if not engaging with) a visible member of staff is the most obvious expression of this.

At a minimum, hearing from and knowing that a real person is within reach, can be acceptable on shorter, "lower stakes" journeys

...but in their most recent journey, fewer than half of participants reported seeing any staff on board trains

In advance of the workshop (during October 2023), community participants were asked to describe a recent journey, including their impressions of any staff on board.

Findings in the graphs below were not based on direct, closed questions, but taken from qualitative descriptions and feedback about these journeys. Graphs should be read as representing overall trends in experience rather than robust, quantitative measurements



When staff were encountered, customers' overall impression and outcomes were usually positive – though this is not always the case and there is room to improve



Everyday, familiar journeys



Interactions with staff were positive in about half of examples given

Most of these appreciated **staff presence** itself, along with **genuine engagement and positive attitude**

...it was quiet and pleasant, just a short early morning journey ...A guard came around to check tickets and he was polite and friendly. It was straight forward and quiet as it was an early morning train.

(Julie, leisure, urban)

...staff onboard... checked in with me to assure me that someone would be at the other end ...to get me off. This was much appreciated as I often worry about being stranded on a train ...They also asked if I was comfortable and if there was anything they could get me.

(Sarah, leisure, urban, wheelchair user)

Most negative experiences were due to a **lack of staff**; but where interactions with staff were poor, this was due to **lack of engagement or perception of poor attitude**

Ticket inspectors [on my service] pay a cursory glance at your means of payment ...and move on. They travel in intimidating packs... There are frequently beggars ...and petty crime being reported on our service...There are no staff ...on board to control these issues.

(Fiona, leisure, suburban)



Less frequent and familiar trips



Interactions with staff were positive in almost all examples given

Again, **friendly interaction and positive attitude** make a difference, as does **specific help and assistance**

The attendant is usually friendly and checks your ticket.
(Clive, business, rural)

...they passed through checking tickets and I saw them at a refreshment area. The staff seemed pleasant so I would say they met expectations
(Jay, commuter, suburban)

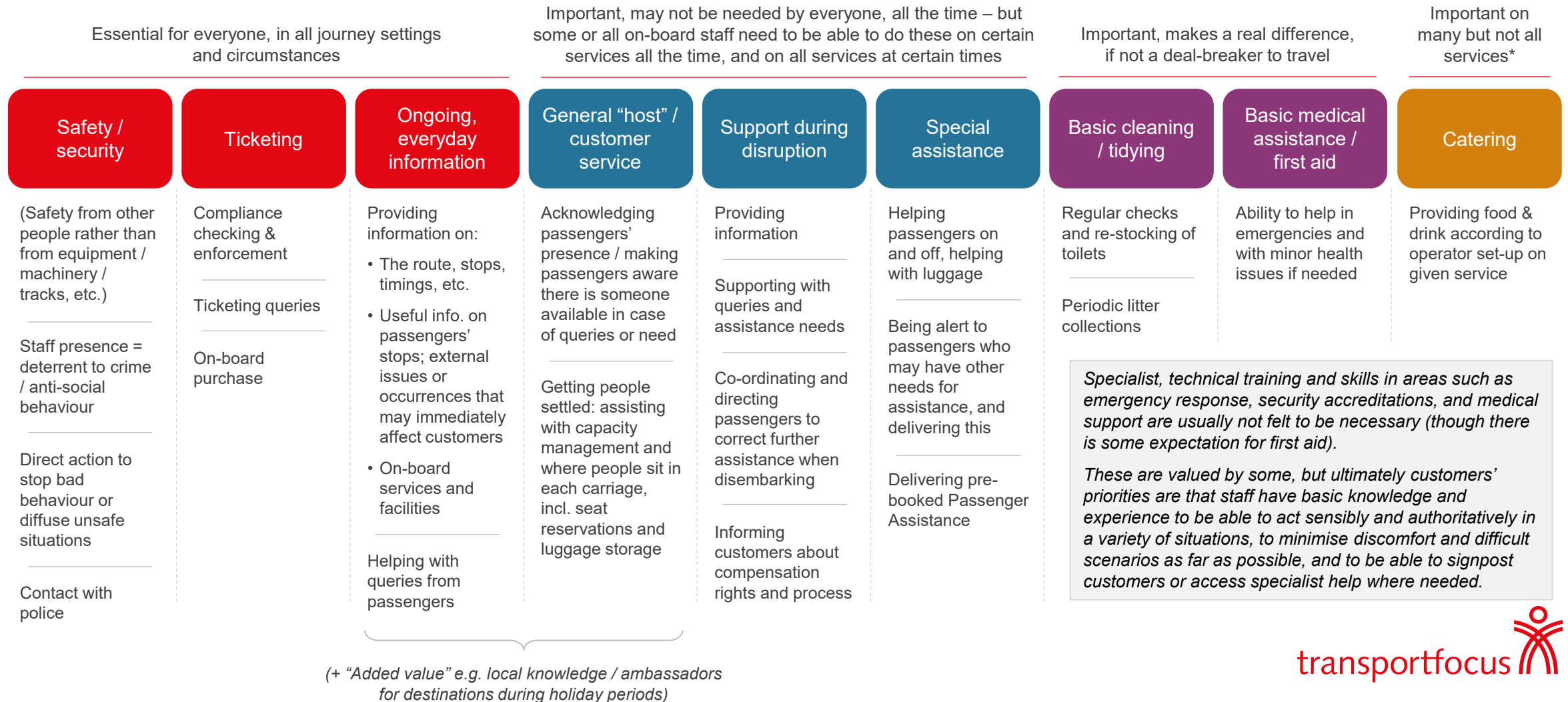
The ticket man on the train was really helpful when there was a problem with my ticket. He didn't exactly give me the right advice but he was very kind and reassuring when I was a little anxious ...and this mattered to me more than the information at the time.

(Rebecca, business, rural)

...there was a very helpful guard that was giving a lot of people help en route to Gatwick and other stations.
(William, business, urban)

Individual customers also experience **differences in staff and customer service approaches with different operators**. They see this as illustrative of the employer, with **staff attitude towards customers being a manifestation of the culture more broadly within an operator**

The tasks and responsibilities that customers see as important for on-board staff: nine customer-facing functions in addition to operational requirements

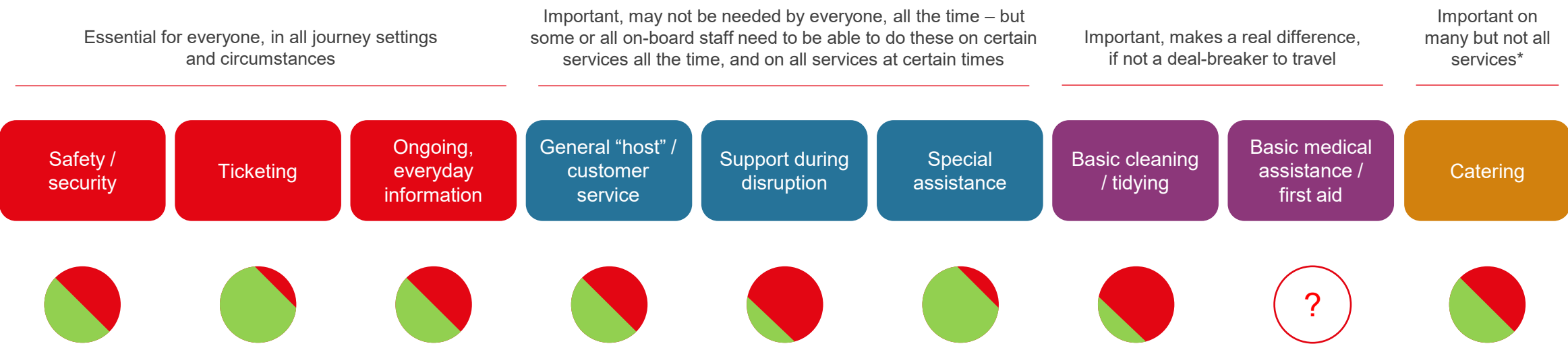


Breaking staff roles into these responsibilities helps explain why, overall, customers want to see (visible) staff on board, on more trains including local services: **several of the staff functions that customers value are only possible, in their view, in person**

	Essential			Important, on certain services, or at certain times			Important, if not a deal-breaker		Important on many services*
Feedback from customers is that these functions...	Safety / security	Ticketing	Ongoing, everyday information	General “host” / customer service	Support during disruption	Special assistance	Basic cleaning / tidying	Basic medical assistance / first aid	Catering
Require in- person, visible staff on trains		✓			✓	✓	✓	✓	✓
Ideally involve visible staff in most cases, plus tools & tech to support them In some cases tools & tech may working in place of fully visible staff	✓		✓	✓					
Some staff functions are mainly relevant on longer distance services; for others staff are needed on both shorter and longer distance services	Both	Both	Both	Mainly longer distance	Both	Both	Mainly longer distance	Both	Mainly longer distance

* See separate, dedicated report on catering and other on-board services and facilities

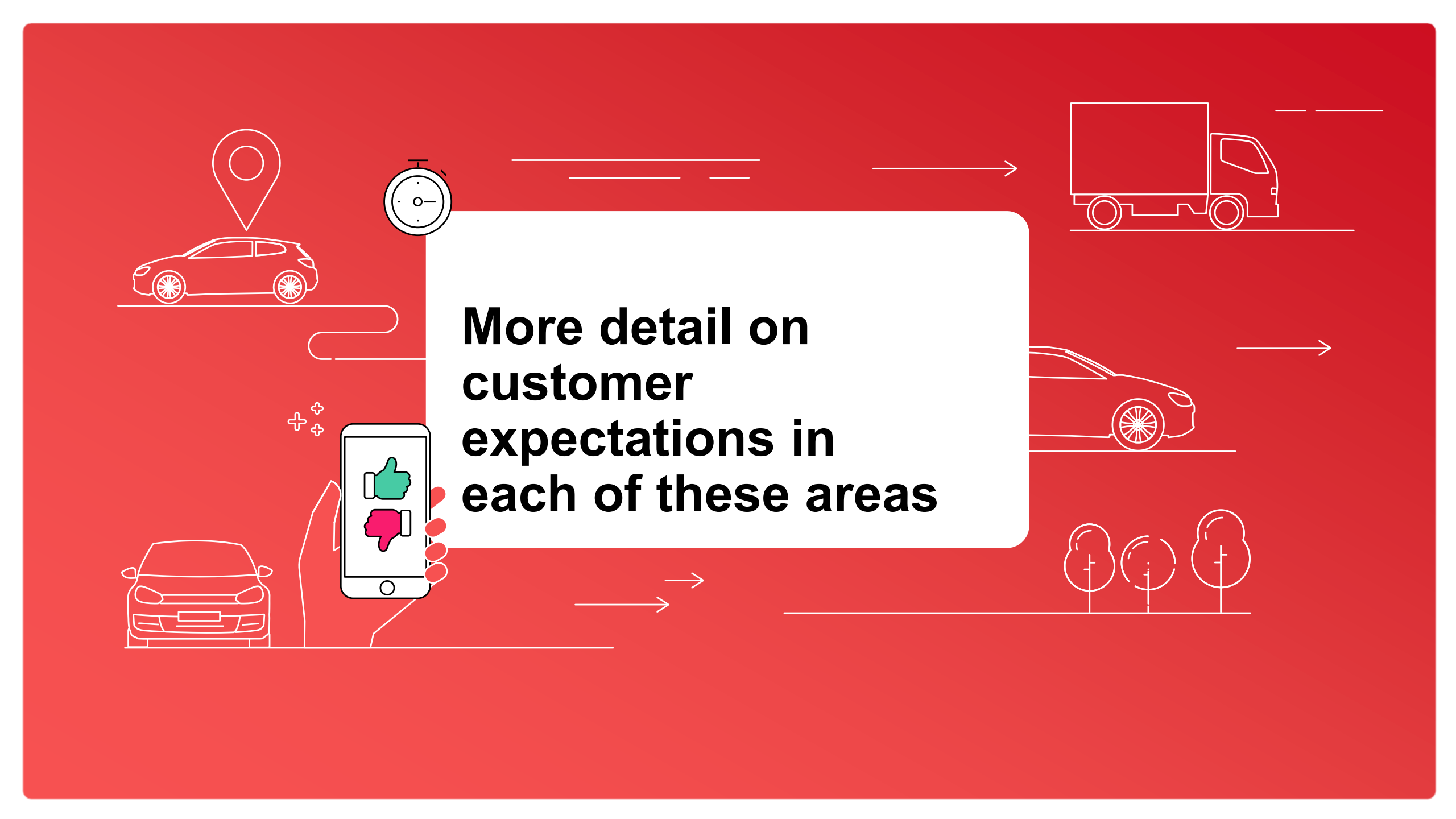
Some of these responsibilities and functions are performed better than others currently: workshop discussions highlighted specific areas for improvement:



More detail on customer expectations, and how customers perceive staff execution of these responsibilities, is given over the following pages

“Traffic light” colours provide a qualitative indication of the mix of sentiment in workshop discussions around each of these topics

** See separate, dedicated report on catering and other on-board services and facilities*



**More detail on
customer
expectations in
each of these areas**

More detail on **security**: the current experience

To customers, this area of staff responsibility requires:



Their evaluation of current staff performance



The issues

- ✓ Ideally, in most cases, **visible staff**, plus **tools & tech to support them**

(In some specific cases this might be in place of fully visible staff)

- ✓ Visible staff presence on **both shorter and longer distance services**



In practice, personal experience of safety or security issues are relatively infrequent (on most services), but **concern about safety is common**



Key criticism is that **staff are not present or visible** when rail users feel nervous, or when they observe or experience any safety issues



A secondary criticism is that, when they are present, **staff do not do enough to dispel anti-social behaviour** in particular

While operational risks from the train, tracks, electric circuits and so on are clearly important and have implications for staff, these points are less salient to customers.

From customers' perspective, safety and security issues are almost entirely about potential threat or discomfort caused by other people on the train:

- **Low-level anti-social behaviour** which makes some people fear escalation
 - Feet on seats
 - Loud / rowdy groups
 - Drinking alcohol
- **Actively disruptive anti-social behaviour**, i.e. that is disorderly or encroaches on others
- **Crime and prohibited behaviour** including begging

These issues are more salient but not limited to:

- Later at night
- Around major events (notably football matches)
- On shorter distance. local services
- Women, and younger people

More detail on security: customers' requirements from staff

Rail users want more in terms of safety and security on board trains, and see staff as a vital part of this

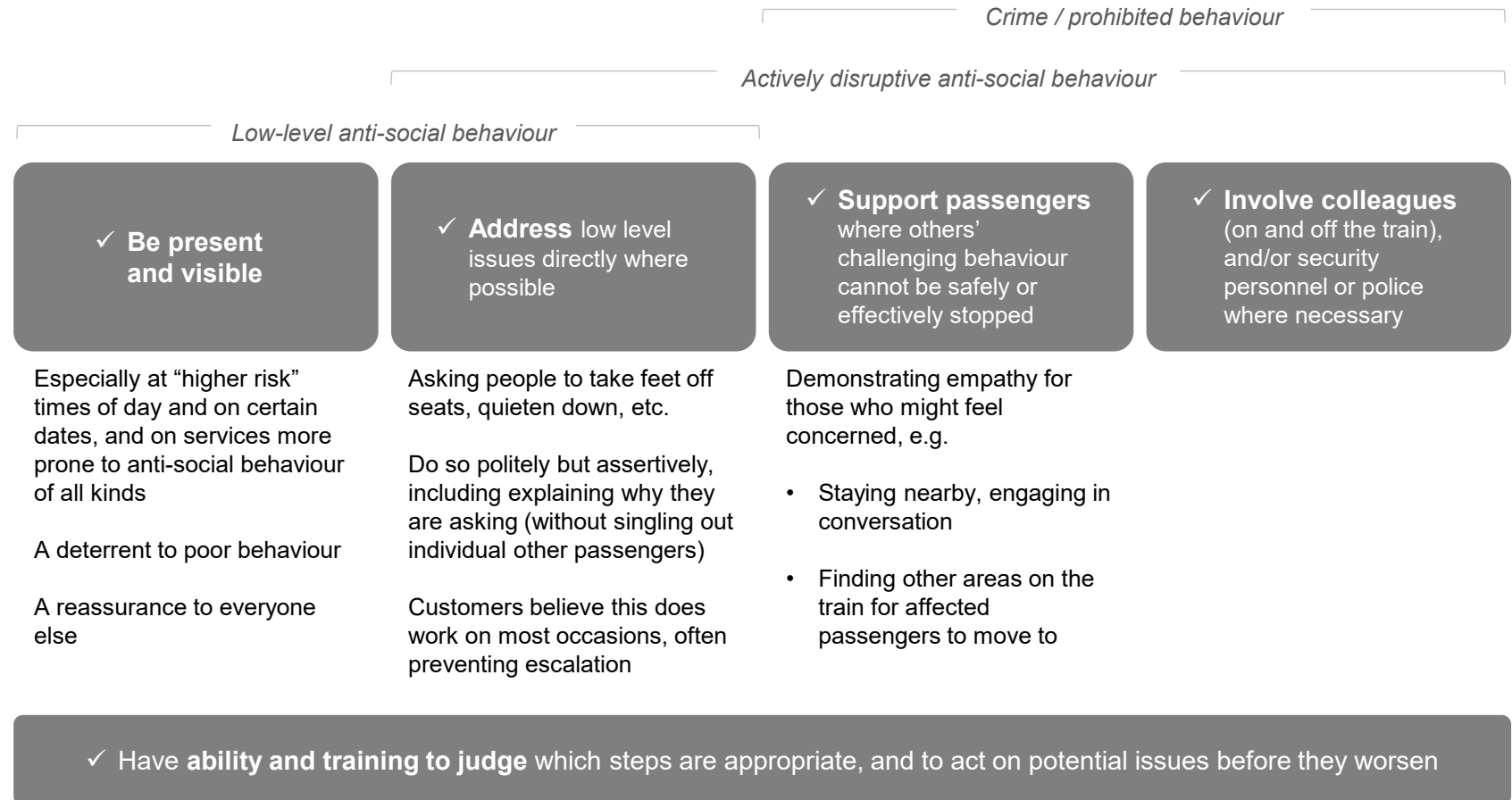
Views are somewhat mixed around what exactly is required from staff and how involved they should get in any problems, or potential problems

This can be an emotive topic and customers often have impulsive or top of mind requirements for staff, which are tempered when they consider how operators and their staff can deliver well on these in practice.

Customers do absolutely respect that staff's safety is also paramount.

Nevertheless, there are some minimum expectations which are broadly agreed on.

With some judgement around the type of threat or discomfort (and in addition to responsibilities for operational safety), **staff should...**



There is also a role for other tools / services to support security on board



Communication via on board loud-speaker

Seen as a useful – and expected – way to reassure passengers that they are not alone, and a reminder to those who might cause trouble that the train is staffed

Announcements should therefore be:

- **Human, live** (rather than, or in addition to, automated messages)
- **Once or twice** during a passenger's journey
- **No need to refer to security specifically:** communication is there to demonstrate staff presence...
 - ...unless, in isolated cases – specific announcements are judged necessary to address specific behaviour
 - And staff should find reasons to make announcements, e.g. simply about their presence or the service, even if there is no deliberate “information” they need to give out



CCTV

Mixed views about CCTV use in society generally: some dislike being “watched” (especially older participants in this workshop)

However, on the whole, **most accept that benefits outweigh drawbacks in the context of rail:**

- ✓ a deterrent to anti-social behaviour
- ✓ A reassurance to those feeling less secure, for this reason
- ✓ A potential support to staff managing behaviour on board

But, participants were very clear that **CCTV should be actively used:** somebody should be watching, and come to help and/or make it known (to both those who might be vulnerable, and potential trouble-makers) that they are on board



Police



Impressions of British Transport Police on the railways are very mixed:

- × Most feel police are rarely or never seen – and when they are this is limited to stations; **few have ever seen police on board trains**
- ✓ When they encounter police, most are reassured by their presence and assume or perceive that **they do a good job** within their remit
- ? **Ambiguity about what BTP's powers are** *This is partly caused by the name – participants were unclear if BTP were police, or a separate agency: simply referring to “the police” could be more meaningful*

Rail users feel it is important that:

- Police are **more visible** across the railway, including on board
- Police (are seen to) carry out **spot checks** on trains, especially as it begins to get dark or during large events affecting local travel
- Passengers and staff have **a clear way to contact police*** during journeys
- **Armed police usually unnecessary** – and potentially alarming – except in specific circumstances where police judge this is appropriate

Rail users feel that, in most cases, **none of these should be a replacement for staff**, but tools used together to support their work given they cannot be in all parts of the train at once

In some cases (lower-risk services and times of day, and often where people are making shorter journeys) it can feel acceptable that staff are not physically on board, **with CCTV and live, on-board audio enabling remote supervision and contact – provided this is supported by the potential for staff or police to respond quickly** to any issues from stations en route and via on board announcements

**Note: the “See it, say it, sorted” campaign is extremely well known, and the sentiment is appreciated. However, many participants don’t remember the number (they would need to refer to a poster or look it up, having been made aware by the campaign that it exists), and that they feel the lack of police, and on-board staff generally, is at odds with and undermines the message. There is some cynicism around campaigns like this and a concern that this one may have had too much air time, potentially taking budget away from tangible staff provision.*

More detail on **ticketing**: customers' requirements from staff

To customers, this area of staff responsibility requires:

- ✓ **In- person, visible staff** on trains
- ✓ Visible staff presence on **both shorter and longer distance services**



Their evaluation of current staff performance



Ticket inspectors are seen on most journeys, and this is appreciated for a variety of reasons

On the whole, ticket inspectors are felt to be **helpful, professional, and friendly** (enough). Occasionally they are praised for going above and beyond by being especially helpful or welcoming



Criticisms arise when ticket staff:

- **Are not seen** at all
- **Do not engage** with passengers and work purely functionally
- **Are rude, accusatory or unforgiving** when a passenger has made a mistake or was unable to buy a ticket prior to boarding, or cannot / is slow to find or access their ticket

What customers need and expect from staff

- ✓ **Ticket compliance** checking (many feel that other passengers “get away” with not paying their fares when there is no inspection, increasing the prices for everyone)
- ✓ **Help and information** about tickets and their limitations
- ✓ **Ticket purchase**

Ticket staff must do this with...

- ✓ **Empathy and patience**, when customers don't understand complex ticketing, make genuine mistakes or have trouble finding their tickets
- ✓ **Professionalism** when someone has failed to pay

Note that while ticket compliance can often be ensured via ticket gates before boarding, but most participants have experienced gates being open some or all of the time, and are aware of or have seen people jumping over gates. Seeing ticket inspections taking place is therefore very reassuring, even when gates are truly effective – **to some degree, ticket inspection is about perception management** as well as making checks in practice

Related aspects of the ticketing function also make on-board staff presence necessary

A suggestion arising from the workshop was that ticket inspections might happen as random spot checks, giving the same member of staff space for other customer service / hosting tasks as part of a multi-functional role

More detail on **(everyday) information provision**: customers' requirements from staff

To customers, this area of staff responsibility requires:

- ✓ **Visible staff valued** on both shorter and longer distance services
- ✓ **In some cases**, on some shorter distance services, **this can be delivered more remotely**



Their evaluation of current staff performance



Most **day-to-day information**, e.g. about upcoming stops or very minor delays, is **delivered reasonably well**

When encountered face to face, **staff are usually found to be knowledgeable, constructive, and personable**



Key criticisms are around announcements:

- Often **difficult to hear**: poor sound quality or too quiet, and some members of staff do not speak clearly to exacerbate this
- **“Barked” or delivered without real engagement** in what is being said, or its implications
- Relayed as **operational facts** direct from the control room, either making them meaningless to customers, or lacking information about implications and next steps

What customers need and expect from staff

Provide information on:

- ✓ The **route, upcoming stops, timings**, etc.
- ✓ **Useful information about passengers' stops**, for example:
 - where to head for interchanges, or for the way out, at larger stations
 - external issues or occurrences that may immediately affect customers alighting there
 - (where possible, and especially for popular tourism or business destinations) additional local area knowledge
- ✓ **On-board services and facilities**
- ✓ Other **ad hoc queries** from passengers

Whether present or remote via announcements or other channels, staff must do this with...

- ✓ **Engagement and interest**, demonstrating care and awareness for customers
- ✓ **Consideration (and follow up) for the consequences** of any information imparted
- ✓ Care to **ensure that messages are registered** by customers

Note that announcements – even where the quality is good – are usually not sufficient alone.

To meet the needs identified here, they usually need to be accompanied by visual information, to reach those with hearing loss, and passengers using headphones, for example, or not concentrating

...and often re-iterated or followed up in-person, to reach the same groups and too ensure that messages are understood and that customers are able to act.

This is especially true:

- For longer distance services or those where people may be making less familiar journeys
- For information about changes to the service or to what passengers will find when they get off the train

More detail on **other types of on-board customer service and interaction:** customers' requirements from staff

All of these areas of staff responsibility share similar principles, in terms of customer needs and expectations, with the provision of more everyday service information

General “host” / customer service

To customers, this need requires:

- ✓ **Visible staff; in some cases delivered remotely** (though customers value staff being on board)
- ✓ Mainly relevant to **longer distance services**



Individual members of staff may “host” and provide great service, but this **feels ad hoc and personality-driven** rather than part of an operator's culture, and there appears to be **no standard for staff to be present**

Support during disruption*

To customers, this need requires :

- ✓ **On board, ideally visible staff**
- ✓ On both **shorter and longer distance services**



Pockets of excellence, but on-board **staff, and communication in general, often felt to be lacking**

When present, **staff often felt to lack information**, and sometimes the **traits to care for passengers** when they most need help

Special assistance

To customers, this need requires:

- ✓ **On board, visible and pro-active staff**
- ✓ On both **shorter and longer distance services**



Feedback suggests **most special assistance is delivered well**, given it is often booked in advance

However there are **isolated occasions when staff are not present, or lack care or time** to provide this fully. While unusual, this can be devastating

What customers need and expect from staff

- ✓ **To be acknowledged**
- ✓ **To know that staff are available** if they need them and/or that they can contact a member of staff
- ✓ Airline-style greetings and frequent contact not necessary, but demonstrating **openness** is important

In practice this means, at a minimum:

- Walk through and **make eye contact** with passengers, and/or **make presence known** via audio or other means
- ...once, soon after boarding, more on longer journeys
- Staff with ticketing and general information responsibilities **should see themselves explicitly as general customer service personnel** too

What customers need and expect from staff

- ✓ **Information** on what is happening, and its implications including likely duration
- ✓ **Practical support** with next steps where alternative travel plans need to be made
- ✓ Reassurance and **empathy** at a time of stress
- ✓ Information about **rights and compensation**, and assistance with accessing this

What customers need and expect from staff

- ✓ **Specific, booked assistance** for people needing help, for example due to a disability
- ✓ Day to day help with getting on and off, especially with luggage (not necessarily booked, requires **pro-activity and attentiveness** from staff to spot ad hoc needs)
- ✓ **Checking in on individuals** who may have additional needs or concerns

There was some discussion in the workshop about having a process for individuals to identify themselves at point of booking and/or when they “check in” on board, as being deaf, having difficulty understanding stops, or any number of other concerns – for which they may not need formal, booked “passenger assistance”, but where they might appreciate a member of staff checking on them at points in the journey

More detail on requirements for **other tasks and services delivered by staff**

Basic cleaning / tidying*

To customers, this need requires:

- ✓ On board, visible staff
- ✓ Mainly relevant to **longer distance services**



Perceptions of cleanliness on board trains generally is very mixed, partly linked to age of rolling stock*

Customers feel staff should have a role in maintaining cleanliness, which they very rarely see currently

What customers need and expect from staff

While there are many elements to keeping trains clean, some **visible signifiers make a difference** to customers: the appearance of seats, litter, impression of toilets.

Staff can influence these, and customers want to see:

- ✓ **Better enforcement of keeping feet off seats** (see previous pages on anti-social behaviour: while customers accept that it doesn't always work, they feel staff can simply ask people, much more often than currently, to behave better)
- ✓ Periodic, in-journey **litter collections** (which also helps to fulfill more general desire to know staff are around)
- ✓ **Regular checks on toilets**, to wipe down water drops and re-stock paper, soap, etc. Simply seeing these very basic checks taking place is likely to reassure

Basic first aid

To customers, this need requires :

- ✓ On board, visible staff
- ✓ On both **shorter and longer distance services**



Some assume that a member of staff on board “must be” first aid trained, but in general **customers simply don't know if this is the case or not**

What customers need and expect from staff

This issue isn't top of mind for customers, but **some presume that first aiders are required be present in most public spaces – including on trains**. Where this is the case, being informed of it can be reassuring

Customers would certainly value first aid training for staff. However, they are pragmatic **their priorities are** that staff:

- ✓ Have access to basic **first aid supplies on board** and can administer them
- ✓ Will be **authoritative and empathetic** if someone falls ill
- ✓ **Take steps for additional medical assistance** as needed (e.g. calling ahead, stopping at an earlier station than planned, etc.)

Catering*

To customers, this need requires:

- ✓ On board, visible staff
- ✓ Mainly relevant to **longer distance services**

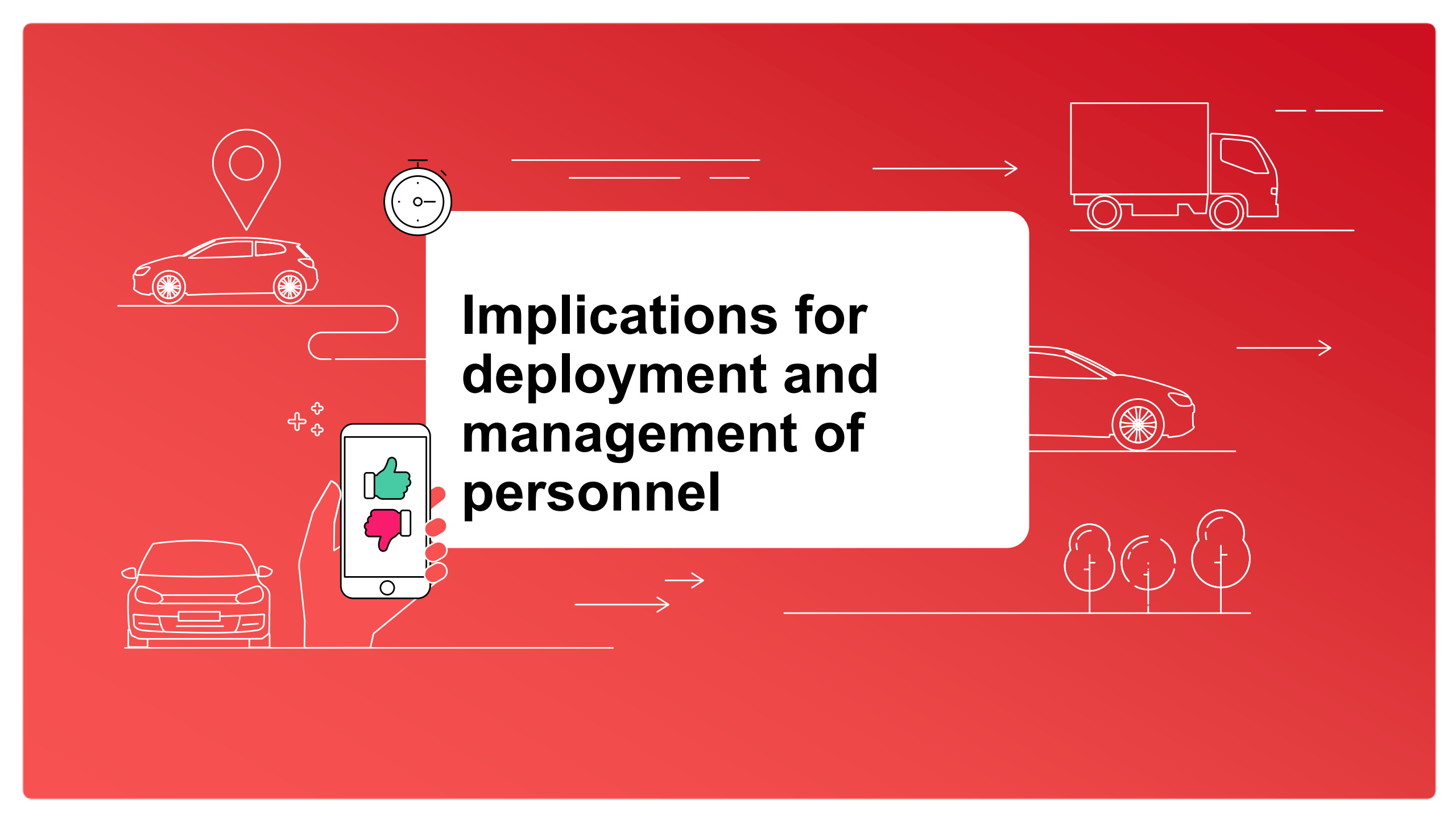


Interactions with catering staff, where they are present, are **usually positive**

More broadly, passengers want to see a **consistent, reliable food and drink offer** on board trains – a wider issue than the way staff execute the service*

What customers need and expect from staff

- ✓ Customers would like to see food and drink provided on most longer distance trains – and so expect staff to be present as part of this
- ✓ Specific requirements around at-seat ordering, trolley services and catering carriages are less important currently (see more in separate report on catering)
- ✓ Catering staff (if they are present in addition to other on-board staff like ticket inspectors or customer service personnel) are **expected to have a level of knowledge about the train service, its stops and timetable, and even about any disruption – or to have the ability to help customers access this information** (not simply to deflect queries)



Implications for deployment and management of personnel

Deployment and management of personnel: **the number and prevalence of staff on board**

While customers want to see more visible staff on a wider range of train services, they are also pragmatic about potential limitations.

Nevertheless, their feedback provides some broad **guidelines around their expectations for the salience of staff**, in terms of...



Deployment

Customers don't expect to see large numbers of staff on board trains, but they feel that staff provision can be improved and optimised:

- They want to know that staff, who have a customer service focus, are there, available, and approachable (regardless of whether or how often they see them in person)
- They want to know how and where to contact the staff if needed



Numbers

As a very broad rule, customers expect there to be **at least one member of staff on board, in addition to the driver**, with...

- More staff on longer distance services
- Dedicated staff in First Class areas to warrant the premium (providing this premium is not used to justify having no staff in Standard class carriages – having access to staff is seen as an essential part of the service for all)



Frequency of contact

They want to see staff members **at least once during a journey, more often on longer journeys.**

On some short distance, local or “lower stakes” journeys, it can be acceptable to hear from or be made aware of staff rather than see them, but this is desired with the same frequency

Deployment and management of personnel: **job descriptions and teamwork**

The focus needs to shift from deploying staff for specific, individual functions, **to operating a team which collectively provides for a range of potential customer needs**. Key areas for consideration with this include:

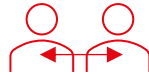


Staffing beyond drivers

Given the **responsibilities** identified as important to customers
...and given the strong **desire to be able to contact, and/or interact** with staff on board



There are relatively few instances where it feels acceptable, from customers' perspective, to rely only on a driver, who cannot fulfil these requirements in practice



Customer expectations for staff roles

Any and all staff on board should have **multi-functional ability** to deliver the full range of responsibilities outlined earlier, **taking ownership** of, rather than deflecting, issues
...and linked to this, that staff on board should **work as a team, with the collective objective to deliver customer journeys, rather than in separate silos**, with individual, more functional / operational objectives (as is the perception currently)

Deviations (not exceptions) from this are that **catering and security / BTP staff will necessarily have a more specific focus**, and will not sell or check tickets.

However they **too should have some basic ability and preparedness against all nine of these functions**, and be able to signpost passengers to the right place for more help.

And all staff on board (including drivers) should have a **minimum standard of training relating to customer service** and being customer facing

Note that **job titles may play a part in this**:

- A subtle implication to both customers and staff themselves about the scope of a role
- (Current inconsistency of job titles across operators does not help with this and could be standardised for better understanding and clearer management of expectations, e.g. "guard", "train manager", customer service manager", etc.)



Train doors: not a boundary to different services

A customer's journey does not begin and end at the train door, but involves time at stations and potentially on board other legs, and sits within a wider end-to-end journey

In order to effectively deliver customer journeys, the **teamwork among on-board staff should...**

- **Begin on the platform** (where the customer's on-board experience also begins)
- And ultimately, **extend to other staff across the network**, especially but not limited to customer-facing staff at stations. On-board staff need to be in contact with and working with others so that they know what is happening and what passengers therefore need to know, and to make sure that issues or needs identified at one point in a customer's journey are carried through to other parts of it. This is all true both within and across operators.

Deployment and management of personnel: **softer skills and day to day working ethos**

Feedback highlights important qualities and abilities for customer-facing staff on board trains

- ✓ Practical / pragmatic
 - ✓ Responsive, and pro-active (able to take initiative)
 - ✓ Well-informed
 - ✓ Accountable
 - ✓ Well-presented
-
- ✓ Human, personable, approachable
 - ✓ Empathetic, fair
 - ✓ Engaged, enthusiastic
 - ✓ Confident, authoritative
 - ✓ Professional
 - ✓ Honest, transparent

These need to be managed in and fostered by employers



Soft skills and a hospitality mindset need to be key requirements **at recruitment**, followed by...



- **Ongoing training and engagement** with staff to ensure a **customer-first mentality is a focal element** of their role
- **Empowerment** (via tools, information, trust) to take the initiative to deliver for customers
- Finding ways to **ensure that working on board trains is something to be proud of** and aspire to

Workshop participants suggested initiatives like regular awards for good customer service, and creating / joining a recognised qualification in customer service. These give staff tangible recognition, and a transferable skill which has credibility beyond rail, to give their role greater kudos. Staff achievements in these areas could also be celebrated in ways that customers have opportunity to be aware of them

This echoes earlier feedback in this community programme, about impressions of ticket gate staff at stations: rail users can (perhaps unjustifiably) have a somewhat lowly perception of these roles, which likely influences the way passengers interact with them, and therefore contributes to a viscous circle of poor engagement between customers and workers. Creating a perception of greater worth in customer-facing roles – and making this visible to customers – could help to break this



Relevant to all staff working on board trains, where they have any passenger interaction

- Inspectors & guards | Caterers | Cleaners | Dedicated customer service staff | Train managers
- Drivers
(customer service requirement more limited, but not absent – and from customers' perspective, increasing the customer service requirement on drivers should not justify reduction in other staff)

...in tandem with all other operators

(across both station and on-board staff, and other customer touchpoints)

Seek to establish consistency in the scope of staff roles, and of the customer-first mindset among staff and managers across the industry before developing policies or new initiatives

The potential for inconsistency in the quality of customer service across operators is likely to undermine impressions of customer service across the railway more generally

Making on-board staff visible and reachable for customer interaction

Rail users understand practical limitations on staff: that they cannot be visible and attend to all customers in all carriages, all of the time (and nor do customers need this).

But for most train services they do value staff presence: **they want and need to know staff are there, and to have the opportunity for two-way communication.**

This means:

- ✓ Pro-actively making customers aware that staff are on board and available to help
- ✓ Ensuring that customers can receive and access journey information
- ✓ Giving people opportunity to find / contact staff during the journey

A range of tactics and tools can help make this a reality:



Walk through train (and engage with / acknowledge customers, via eye-contact as a minimum)



Make **announcements** about presence of staff, and where they will be throughout the journey
"I'm in carriage C in the middle of the train if you need me"
Quality audio, clear speech, and avoiding overlap with automated announcement are paramount



Dedicated area / desk where staff can be found (or called, if they are elsewhere on board), which is publicised and standard on all similar services



Clear **provision of email addresses / phone numbers / websites**, for further information or to reach contact centre



Information screens

Personal / seatback, or provided for a group of seats
Supplementing audio for those unable to hear
Information direct from control, information about other services / wayfinding at upcoming stations, etc.



Interaction screens / points

Taking info. screens further to enable interaction: assistance requests, reporting problems, catering orders, etc.



QR codes at tables for information or to open up a chat with staff (or, for triage, a chatbot)



WhatsApp (or similar) chat

Specific to individual train, for direct contact with staff



Call button (as on planes)

Customers recognise that some of these direct contact options create the potential for abuse or for staff to be overburdened with too many or insignificant requests.

On balance, the **most popular and realistic idea was felt to be Whatsapp chats**, allowing customers to describe their individual need, staff to determine priorities, and options for responding via Whatsapp, in person, or as a broadcast announcement

Staff being well-presented is a part of coming across well

Community participants agreed on some principles for staff presentation:

✓ Stand out

Recognisable colours and style of uniform that is noticeably different from passengers

Hi-vis not appropriate on board (associations with rail engineers or construction workers rather than customer-facing staff)

✓ Identifiable as staff

Consistent colours and style of uniform across (customer-facing) people working for the service

✓ Tidy, clean, professional

✓ Approachable

“Here to help” signage or badges can help

Smiling!

Mixed views on whether or not on-board staff need to be “smart”, but a general consensus that they should dress in a practical way for the job, appear competent and authoritative, and avoid appearing stuffy, bureaucratic, or over-thought

Body cams were also discussed as part of staff's role in providing security on board.

Although some liked this idea, it was not strongly called for overall and on balance feels like a step too far, coming with more questions and disadvantages than potential benefits:

- Lack of clarity around the purpose of bodycams used by police (is it to protect police, or those they encounter?) leading to different interpretations of what this does for the relationship between staff using them and customers*
- Could be alarming and inflate perceived security concerns*

(All of this echoes important themes in the management and deployment of staff at stations)

During an earlier workshop (in June 2023) about their experiences and needs at stations, the community highlighted important themes for staff on site

Accessible to customers

*Visible, approachable, reachable
(or as a minimum, in some limited scenarios, known to be present, e.g. via audio or other channels)*

Connected

Meaning the immediate local area, and interconnecting routes that customers might also be using



On board trains, this means

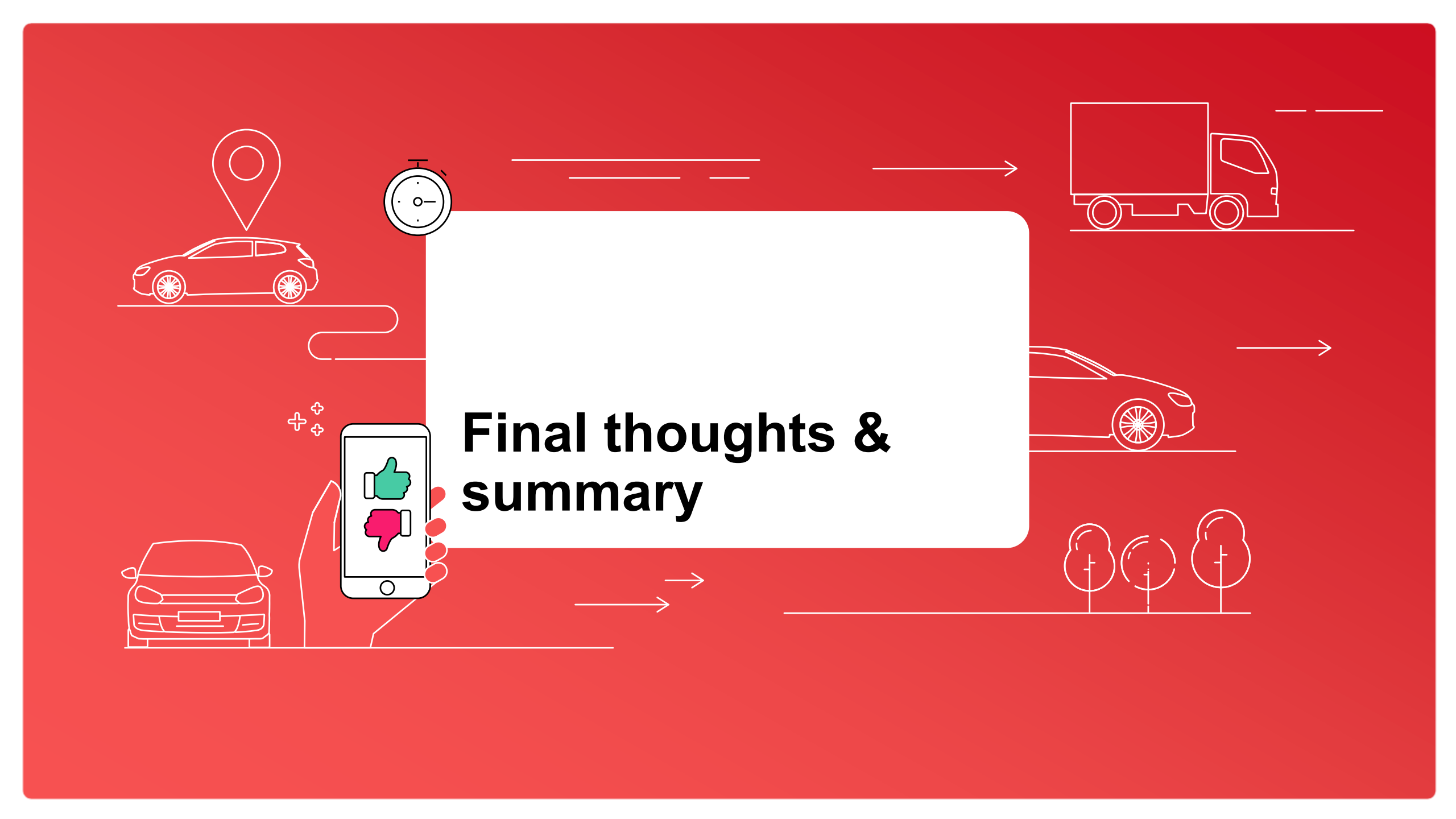
- ✓ *A more holistic approach to delivering customer journeys:*
 - *working as an on-board team*
 - *connected to other staff at stations en route (regardless of operator)*
 - *and to operation controllers*
- ✓ *Ability to call on other external support such as police, medical expertise, as needed*

Broad in terms of role, responsibility & knowledge

Facilitating staff to have the ability, agency and flexibility to do what the customer needs, not what a system or job title allows

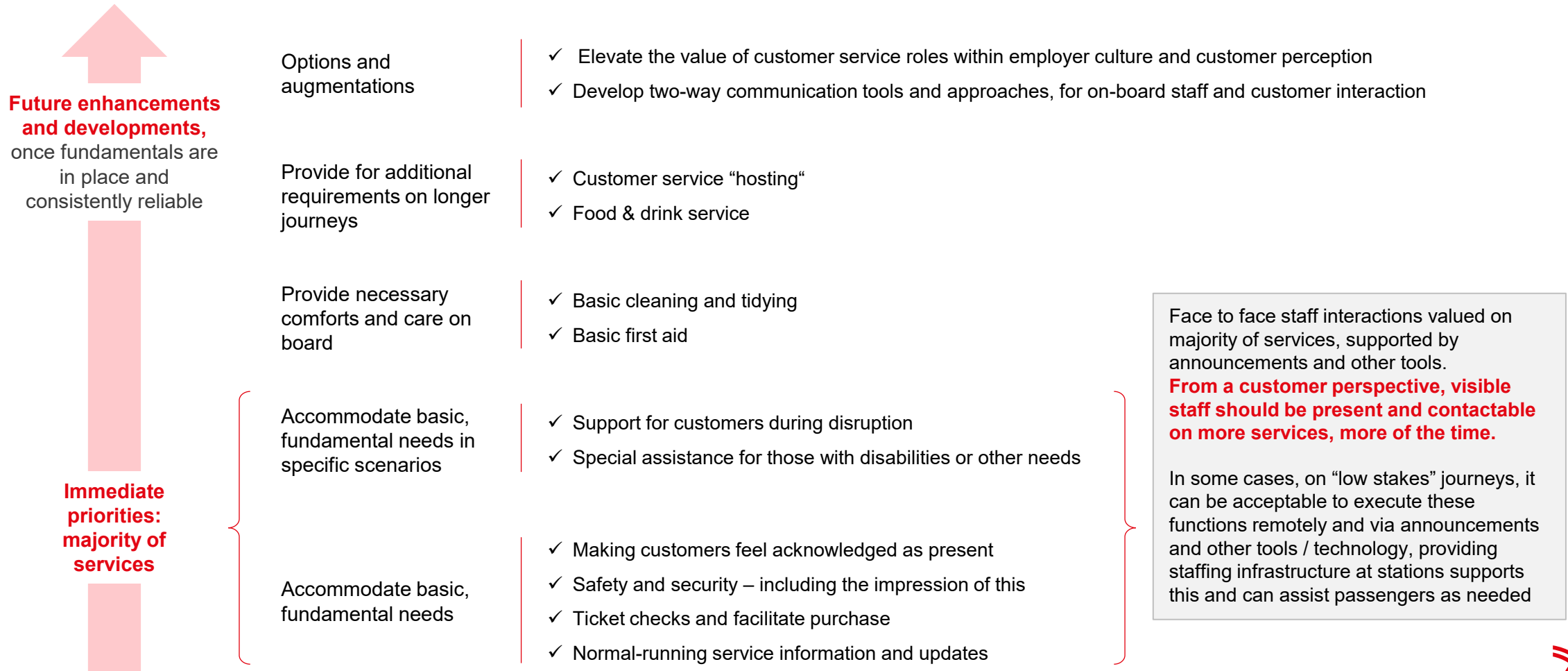
Customer focussed

In terms of both the functions they perform (rather than logistical priorities), and the way they perform them



Final thoughts & summary

On-board staff: a hierarchy of priorities



Summary: the role of staff on board trains

Rail users want and need the railway to be run as a service which truly prioritises the facilitation of people's journeys, rather than a logistics activity: **the industry needs to take a more genuinely customer-first mindset.**

Human interaction between operators and customers is vital part of this, and seeing and/or being acknowledged by staff on board trains is a key expression of it.

Currently, participants in this research say **they do not hear from or see staff on board, on enough services.**

Feedback from the rail user community has identified a range of **specific roles and responsibilities for on-board staff, which matter to customers.**

While a small number of these are mainly relevant to longer distance journeys, and while a minority can be delivered remotely and/or with the help of technology, the majority require in-person staff presence, reinforcing the value of this for customers, on more services than currently.

Among these individual responsibilities and functions, **key priorities for on-board staff are:**

- **Ticket inspection, retail and information** – largely executed well currently where staff are present to do so, but not carried out often enough on enough services
- **Security** – customers strongly feel that staff should be more present and do more to deal with the lowest-level occurrences of anti-social behaviour, to reduce the majority of discomfort and concern, and likely prevent escalation in many cases. They are pragmatic about staff's ability and safety in attempting more than this.
- **Provision of everyday service information** – better communication, including better audio relay, less reliance on audio alone, and more face to face engagement
- **Customer support during disruption** – often felt to be delivered poorly, mainly due to insufficient staff presence on board, as well as lack of up to date and meaningful information, and engaging meaningfully with the implications of disruption for individuals
- **Basic, ongoing cleaning and tidying** – litter collections and re-stocking of toilets, for example, feel like simple, easy wins that staff could do to make a real difference

Summary: implications for management of staff

All of this has implications for how staff are recruited, deployed and managed:

Customers do not expect to see large numbers of staff on board trains, but they feel that staff provision can be improved and optimised, in many cases with existing resources. Their feedback highlights some key considerations for employers and managers:

- On all but local services which typically serve short, familiar journeys, customers would benefit from seeing and/or hearing from **one member of staff on board, in addition to the driver** – and more on long distance services or trains with several carriages – **at least once during their journey**
- **Customers want to know that staff are present, and have the opportunity and tools to contact them if they wish to.** This can be made possible by staff pro-actively walking through the train, announcements, and technology to facilitate two-way communication
- **Soft, hospitality-based customer service skills are important:** these need to be managed in with the right recruitment, and then fostered over time, including building a culture of customer service within employer organisations which might involve specific initiatives. All on-board staff who are likely to come into contact with customers should have these soft skills
- **All staff on board should also have sufficient knowledge to be able to help customers with all of the functions and responsibilities identified here, at least in the first instance** – for more technical or specialist functions all staff should be able to direct customers to the right person or call for help for them
- Staff on board trains should work as a team, with the **collective objective to facilitate customer journeys and provide for customer needs – rather than executing individual functions in silos.** This team should extend beyond the train itself, with staff in meaningful contact with stations along the route, and cognizant that passengers will be using other parts of the service, including potentially across different operators

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).

Any enquiries about this report should be addressed to:

Louise Coward – Head of Insights
Louise.coward@transportfocus.org.uk

Transport Focus
10th Floor, 25 Cabot Sq, London, E14 4QZ

www.transportfocus.org.uk

Transport Focus is the operating name of the Passengers' Council

We work to make a difference for all transport users.