

Getting our Trains Back on Track!

Putting Passengers First



Contents

01	About the BTA	Page 3
02	Welcome from Clive - CEO of the BTA	Page 4
03	Creating a Passenger-led Rail Service	Page 5
04	Rail Traveller Frustrations	Page 6
05	International Ideas - lessons from rail services elsewhere	Page 7
06	Passenger Champions	Page 8
07	A Comfortable Seat on a Clean Train	Page 9
08	Simpler Tickets to Ride	Page 10
09	Transparency and Information for Rail 'Literate' Passengers	Page 11
10	A Route Map from Recovery to Rail Revolution	Page 12
11	Contact	Page 13

01

About the BTA

The BTA is the representative body for the UK business travel industry and Travel Management Companies (TMCs). BTA member TMCs account for over 90% of all business travel booked in the UK.

Our members and partners represent the entirety of the business travel sector ranging from TMCs, airlines, railway operators, car rental companies and hotels to technology providers and financial solutions organisations.



02

Welcome from Clive



Dear Reader,

As Chief Executive Officer of the Business Travel Association, representing the UK business travel industry and Travel Management Companies who account for over 90% of all business travel booked in the UK, I hear stories on a daily, if not hourly, basis of the difficulties that confront business passengers when they need to use our rail services.

Delays, high ticket prices, cancellations, poor conditions on trains, particularly for working, and almost always, a lack of information about rail services at key times, are a staple of the national conversation and front and centre for the business travel sector - who help passengers to find a way to cope with these problems.

Prior to the pandemic, recent years had seen high numbers of passengers making trips on our railways sustained from year to year. Train operating companies looked to improve services through franchises and Network Rail ran the railway infrastructure at arm's length from the government. However, problems for passengers started to mount, even before the pandemic, with cancelled services and shoddy and overcrowded trains. Some train operating companies handed back franchises and had their services nationalised and then Covid struck, almost stopping passenger movements altogether for prolonged periods.

Rail services have recovered since the pandemic but have struggled with driver shortages, strikes, and investment uncertainty. The result has been an inward facing rail industry that seems to often lose sight of the passenger and their experience.

Travel by train and business rail service usage has lagged behind the bounce back in car use and road traffic after the pandemic, with domestic air travel bouncing back even more strongly than before the pandemic.

Business travellers, in a new world of hybrid working, are continuously calculating and recalculating where they can most effectively spend their time. They are keenly aware of dead time caused by delayed or cancelled trains and poor or non-existent working conditions on trains that cost a lot to travel on.

We at the BTA now believe that we need to move rapidly to creating a passenger-led railway system that takes us from a partial recovery in train travel, post pandemic, to a revolutionary new deal for business and leisure travellers that supports a thriving, integrated economy working efficiently for all.

This White Paper aims to set out our analysis and our aspiration to put business travellers and all passengers at the heart of a great rail service that meets their needs and which helps them to focus on what matters.

I hope that you find it useful?

Best wishes,
Clive Wratten
CEO of the Business Travel Association (BTA)

A handwritten signature in black ink, appearing to read 'Clive Wratten'.

03 Creating a Passenger- led Railway Service

Everybody, it seems, has a train story of woe – including those who are responsible for running, guiding or legislating for our rail system.

Since the end of the pandemic a nervousness has set in for travellers about committing themselves to train journeys which may quickly spiral into hours of delay or slow running with only minimal facilities to support them and the prospect of complications on the final leg to home or a hotel once the train has arrived.

This is the only rational explanation for the ‘train hesitancy’ that has manifested itself in travel patterns that have seen car usage and traffic levels bounce back almost completely post-pandemic while train use continues to lag behind.

Despite overcrowding on peak services, many trains remain surprisingly quiet – perhaps the main casualty of business traveller decisions not to chance the trains and to work from home instead, saving on a high fare.

In this context, from the standpoint of the BTA, working with business travellers everyday, it is important to cast a cautious eye over proposals for major reforms to the structures overarching the railway system that are centred on the name and the branding of the lead body.

How will Great British Railways be different from Network Rail?

The BTA wants to see the needs of business travellers and leisure travellers drive a **new passenger led railway system that benefits us all!**



Top tier organisational changes could be beneficial, but surely this is the opportunity to turn our rail system on its head and to put the passenger first.

We are working closely with the Rail Delivery Group and Great British Railways Transition Team (GBRTT). We warmly welcome their commitment to making practical improvements to the rail network now, particularly at stations, as part of the proposed changeover from Network Rail to Great British Railways.

We also support the enthusiasm of the GBRTT for the publication of the proposed Rail Reform Bill and their confidence that it will progress to legislation despite the political uncertainty of this being a likely General Election year. However, we as the business travel community, using rail services every day, need these steps and the transition to be much more transparent, maximising rail user engagement and delivering tangible improvements now, ahead of the dry legal language of the formal changes to the organisational structures of rail leadership, in a relatively short bill, becoming law.

04

Rail Traveller Frustrations

Often the experience of a rail passenger is not shaped by grand infrastructural considerations but is instead undermined by stepping onto a train where the rubbish has not been cleared from the last journey or in-journey changes to timings are relayed late.

This is especially the case if business travellers are paying a premium or uncompetitively high price for a poor service. Too many trains still have outdated stock with threadbare upholstery, made worse by not being cleaned. It is also the fear of not knowing what you are letting yourself in for, that holds back business travellers and potential rail passengers from committing to rail.

Has the feeling of greater certainty and control over your journey as a car driver, with more options to avoid congestion with real time information from sat-navs and apps, come back as a major factor in business traveller decisions between car and rail?

There is a serious danger that, as with unreliable mail services leading to declining usage, a permanently lower level of rail use could become a fixture.

Lessons need to be picked up from well run airlines where embarking and finding dirty plane interiors would be inconceivable and where information on progress towards a destination is displayed on a real time map with weather conditions continuously updated.



The latest figures for the year to September 2023 suggest that rail passenger kilometres travelled, perhaps the best measure of rail service usage, have, so far, only recovered to around 85% of the level that they reached in the year to September 2019, the last full year before the pandemic for which we have statistics.¹



Whereas road traffic levels for the year ended September 2023 are just **2.7%** below pre-pandemic levels.²

¹Source – Office of Rail and Road Passenger Rail Usage Statistical Release 19/12/23

²Source – Department for Transport – Provisional road traffic estimates, Great Britain – October 2022 to September 2023

05

International Ideas

Lessons from elsewhere



Rail industry and business commentary in general frequently attempt to tackle questions about why rail services work better in other countries than here.

It is almost impossible, for instance, to explain why Japanese inter-city trains run largely to an exact minute of arrival and departure while British trains rarely do the same. Japan is often held up as the exemplar of an efficient railway, and yet the geography of the train networks in the two systems is not totally different, with a lot of flat running in both Japan and Britain.

We also see that business rail usage levels across Europe and worldwide are increasing because of investment in rail product offerings, competitive pricing and well thought through multi-modal transport integration schemes.

Our business travellers and all rail passengers are entitled to ask for a British railway system that clearly and consistently compares itself to global best practice and answers the questions about how we can match those levels of service with practical steps towards top class performance.

06 Passenger Champions

Britain has great passenger voices and consumer champions such as Simon Calder and Martin Lewis.

They should be put at the heart of railway decision making alongside a specific business travel champion – offering passenger-led advice on incremental changes that would start to alter rail services on day one of their appointment with monthly reports on progress.

Customer feedback and suggestions could be boosted and monitored using quick QR code surveys at all stations, with a strong focus on the timeliness and quality of train information, train cleanliness, seat comfort, conditions for working and Wi-Fi access, and the success of buffet car catering from train to train, as well as the friendliness and welcome offered by train staff.

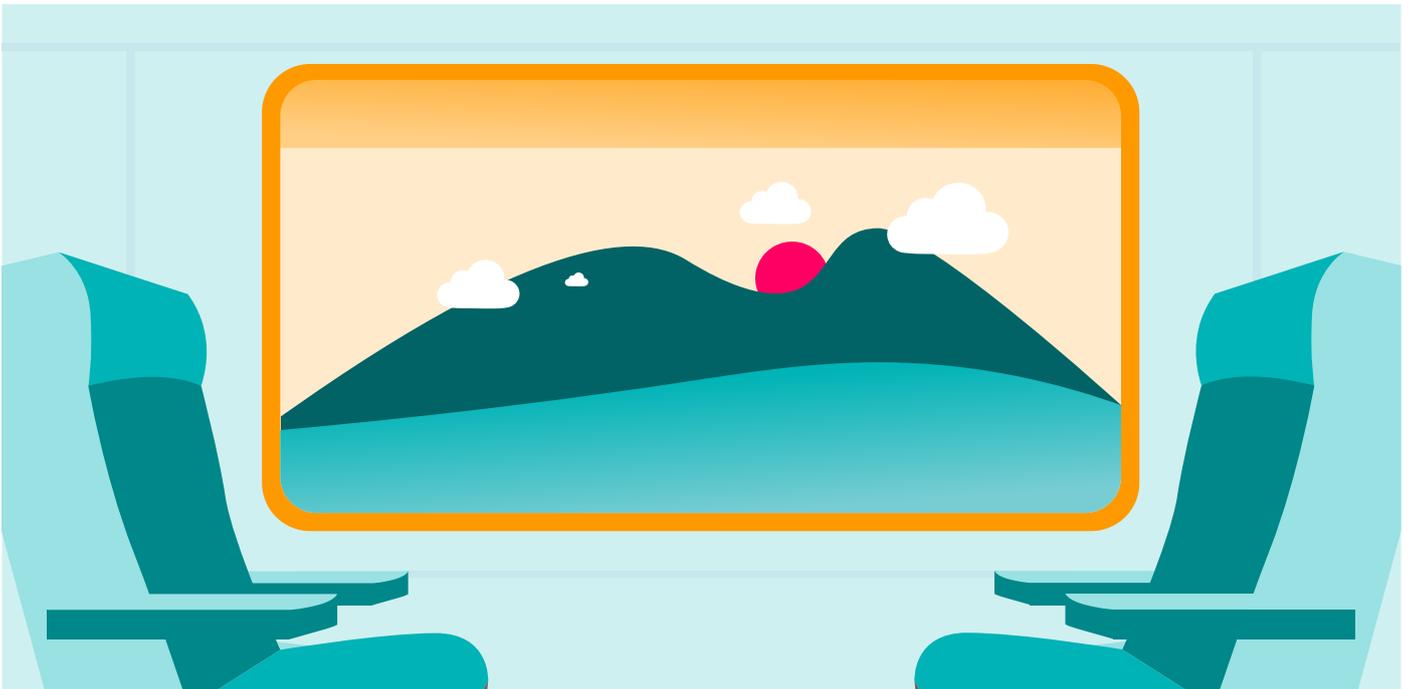
The aim is to trigger a positive feedback loop, perhaps visible on a digital display, of comments and implemented improvements, hopefully encouraging train operator/rail company competition to put into practice customer ideas that could work quickly.

Lateral thinking is particularly needed on improvements to the component services of rail journeys, such as on-board catering with well-known cooks like Nadiya Hussain and Andi Oliver, to be asked to work with passengers, rail and station operators on what can be achieved with better fresh food offerings in small spaces.



07

A Comfortable Seat on a Clean Train



Train trash must be tackled, with carriage grot spots being eliminated, and an end is urgently needed to finding dirty tables when you get on a train.

Improvements in wi-fi connectivity on inter-city trains, which are a step forward, remain elusive elsewhere on the network, with trains often lacking on-board phone charging points and USB ports. Poor and variable wi-fi connectivity on too many trains and journeys still leads to the ubiquity of the 'I'm on a train' opening line on phones or other devices, followed by expressions of sympathy or understanding in response.

Rapid strides in airline connectivity, with genuine competition between them about what can be offered to passengers and which they strongly promote, have not yet become a significant feature in rail company marketing – those offers need to become the norm if rail services are to see a step change in quality. Better connectivity will also be massively enhanced by the guarantee of a clean and suitable table for your laptop or iPad.

Business travellers and those making leisure trips, or combining business and leisure, are willing to play their part in improving services if they are given the chance; that is a huge opportunity for train and station managers.

08 Simpler Tickets to Ride



The ticket inspector's 'walk of shame' must become a thing of the past. With passengers constantly fearing that they have the wrong tickets – usually by mistake – when the inspector calls at a passenger's seat.

Train travellers frequently hear ticket inspectors highlighting their brilliant and detailed knowledge of the range of tickets available for any one train journey, but they hear the explanations with a heavy heart and a burning desire for a simpler system that doesn't catch so many people out. We need to move rapidly from fear to cheer in changing the approach of railway companies to their customers.

Too often it feels as if the railway companies are trying to protect themselves and their income against their passengers rather than delivering a smooth, comfortable and efficient service. Revenue Protection Officers should become Service Enhancement team members! It is hard to understand why a simple ticket for a direct inter-city journey needs to be scanned at both ends to get access to and from the platforms, but also needs to be checked on the train as well! The technology gain of the scanners is lost to the duplication of extra ticket checking on the train instead of passenger welcome and the hospitality offer on board.

Surely there is a vital role for consumer champions with a rail service mandate to knock heads together between rail operators to achieve integration of ticketing across the network. The efficiency gain from using travel apps to speedily book tickets, quickly unravels if complications arise between different railway company offers on separate stages of your journey and especially if Delay Repay and refund schemes kick in requiring laborious uploading and cross checking of original booking information.

Trusted consumer commentators like Martin Lewis and the vital ticketing knowledge of Travel Management Companies need to be put at the heart of a time limited Task and Reform Group to turn the ticketing system around to a position where it starts and ends with the passenger experience!

This work should not wait for the structural reform of rail network. Urgent reform is needed to make ticketing systems simpler.

For railway operators to work in a commercially astute manner that is easy for passengers to use, the companies need a clear mandate, agreed with Network Rail/Great British Railways and the Treasury and with SMART objectives, to drive up revenue through growth and yield improvements, not through ticket price rises.

09 Transparency and Information for Rail 'Literate' Passengers



Business travellers are often very regular travellers and can be trusted with a vastly increased level of information about how the rail system is running at any one time.

Business travellers want the system to work – so give them background detail on why decisions are being made about which services to run during the day, where trains are, and how best to re-route if necessary. AI must be a key driver in transforming passenger information systems.

Railway companies must transparently integrate customer experience reports from third parties, such as Travel Management Companies into their information systems if they are to deliver the seamless service demanded by business travellers.

The more that the railway companies integrate with the entire supply chain, the less isolated and inward-looking they will become.

10 A Route Map from Recovery to a Rail Revolution

1 Ask a new Non-Executive Board to establish Task and Reform work groups on wi-fi connectivity and the business traveller 'work from train (wft)/mobile office' offer including recommendations for new 'comfort, catering and cleanliness' standards and targets for all train journeys



2 Consumer champions must be given a key role in railway service planning with popular regular reporting mechanisms based on SMART principles

3 Use AI to turn network information inside out to give passengers maximum transparency and a much wider range of options at all times

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3 Put passengers at the heart of railway service planning in the most visible ways possible

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5

5 Create a Non-Executive Board for Network Rail/the Great British Rail Transition Team/Great British Railways entirely comprised of representatives of passenger-led businesses such as Travel Management Companies and the train and travel app companies and leading passenger voices like the BTA working with consumer champions such as Martin Lewis and Simon Calder to drive change now

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6 Publicly compare on a regular basis the quality of our rail services with the best in the world. Make clear the steps needed to match the top performing railways. This must also be the basis of all investment decisions on infrastructure such as HS2

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7 Ask the new Non-Executive Board to set up time limited Task and Reform work groups to come up with rapid recommendations. Their remit will include: ticket simplification, fairer ticket pricing and an information revolution for passengers that includes Green Travel Pledge data on carbon emissions per journey

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8 Incremental improvements to each journey for every train traveller must come ahead of, during and after showy, top down reorganisations

9 Start a 'clean carriage challenge' to get all train operating companies competing to be the best

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9 Bring these changes together to create a confident passenger-led rail service which all travellers are keen to use

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11

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