



Passenger Assist Staff Research

Report prepared by 2CV for Office of Rail and Road

West Midlands Trains | October 2025

**INTELLIGENT INSIGHTS.
BOLD DECISIONS.**

LONDON | LOS ANGELES | SAN FRANCISCO | SINGAPORE





Table of Contents

Background to the research	2
Methodology and sample	3
Introduction and summary of findings.....	5
Detailed findings	6
Frontline staff experiences with monitoring and reporting systems.....	6
Risk management and response mechanisms	9
Opportunities for staff engagement and improvement.....	11
Effectiveness and impact of training programmes.....	12
Appendix:.....	14
Additional staff feedback	14
Qualitative discussion guide.....	15



Background to the research

Passenger assistance is a core obligation for all licensed train and station operators on the GB rail network. Each operator commits to delivering assistance, whether booked or on a Turn Up and Go basis, as part of its Accessible Travel Policy (ATP). The Office of Rail and Road (ORR) monitors compliance with this requirement.

To strengthen oversight and promote service improvement, ORR has recently introduced a new benchmarking framework to assess how effectively operators deliver assistance to passengers. As part of this initiative, ORR has identified West Midlands Trains (WMT) as an operator whose performance currently falls below expectations. In line with the new framework, ORR now intends to assess WMT's capability for improvement, to help inform decisions on whether further regulatory steps are necessary.

To support this assessment, ORR seeks rich, qualitative insight from the frontline staff who provide Passenger Assist on a day-to-day basis. Their perspectives are essential to understanding how assistance services operate in practice, including where systems are working well, where there may be gaps, and what potential there is for improvement.

Research objectives

The key research objectives are:

1. Assess Frontline Staff Experiences with Monitoring and Reporting Systems

- Understand how frontline staff capture and report assistance outcomes for both booked and Turn Up and Go (TUAG) services.
- Evaluate the usability and uptake of tools (e.g. mobile and desktop tools) in accurately capturing assistance data.
- Explore staff confidence in applying processes consistently and comfortably, including their willingness to report when things go wrong

2. Evaluate Risk Management and Response Mechanisms: How well are staff organised to deliver passenger assist?

- Examine clarity around staff responsibilities for delivering assistance, including how these are communicated through job roles and operational handbooks.
- Investigate how operators identify, follow up on, and learn from instances of service failure (especially exploring situations of missed assists).
- Identify examples of recent operational improvements or innovations and explore whether staff perceive these as effective in reducing risk and improving service delivery.



3. Explore Opportunities for Staff Engagement and Improvement: Are staff encouraged and motivated to improve Passenger Assist?

- Explore how frontline staff are encouraged to propose improvements and engage in service innovation
- Assess the visibility and impact of staff suggestions, including whether new ideas or best practices are well received, implemented and shared across the operator's network or sector-wide

4. Review Effectiveness and Impact of Training Programmes: Are staff meeting their training outcomes?

- Understand staff experiences of disability awareness and assistance training, particularly whether training incorporates lived experience, enables reflection, and builds confidence
- Explore training materials in terms of relevance, engagement and whether fit for purpose? Explore the feedback loop on training.
- Does the training content adequately prepare front line staff to meet the needs of disabled customers requiring Passenger Assist both in terms of hard and soft skills? Where do they feel more, less confident?

Methodology

- Participants were recruited through an online survey sent out via the operator; eligibility was limited to staff whose duties involve supporting passengers via the Passenger Assist service.
- Staff took part in either a mini focus group or individual depth interview, depending on their and other staff members' availability.
- 2CV set up and arranged the focus groups and interviews at a convenient time for staff to take part – ensuring that there was minimal disruption to staff time and avoiding staffing constraints by agreeing on a specific day and time that suited them around their work responsibilities.

The following sessions were completed with **West Midlands Trains (WMT)** staff:

WMT staff fieldwork

Five 30 to 45-minute individual depth interviews

One 45-minute mini focus group



Sample

Staff from a range of roles were invited to take part in the research, including conductors, managerial roles and station staff members.

WMT sent out a form to eligible staff members to allow them to put themselves forward for selection. 2CV provided additional supporting information to accompany the request, explaining the nature of the research and emphasising confidentiality.

It is important to note that the insights for WMT are drawn from a qualitative sample of seven staff members. The aim was to secure a larger sample but, owing to recruitment challenges, project timings and budget constraints, seven staff members in total volunteered to take part in the research. While this is a relatively small sample, the research highlighted several recurring experiences and challenges which can be used to inform ORR’s assessment of WMT and can be considered alongside ORR’s upcoming assistance benchmarking report.

A total of seven WMT staff members took part – this included:

WMT sample
Three conductors
One manager
Three station staff members



Introduction

This research explores frontline staff experiences of delivering Passenger Assist at WMT. The findings provide qualitative insight into how assistance services operate in practice, where gaps exist, and the opportunities for improvement*¹

Summary of findings

Frontline staff present themselves as committed and resourceful, but feedback in this research highlights that inconsistent training, limited staffing capacity and ineffective channels of communication upwards within the organisation are the three key areas impacting staff's ability to consistently and confidently deliver Passenger Assist across the WMT network.

- **Training:** Delivery of training is inconsistent, and refreshers are felt to be minimal. Following training, staff are confident in fulfilling core, practical assist tasks such as safely deploying and stowing ramps. However, apart from staff who are new into post, there is limited recall of disability awareness training focused on understanding the specific needs of different passengers, especially passengers with non-visible disabilities.
- **Staffing capacity:** Staff report that staffing shortages, unstaffed stations and increasing demand can make delivery and passenger prioritisation more challenging. Staff recognise that delays in support can increase anxiety levels for some passengers if they are not supported quickly, especially at unstaffed stations including upon arrival.
- **Channels of communication:** The current channels of communication to encourage staff to share their ideas for change are not felt to be effective. Staff give examples of how they report day-to-day issues with line managers informally (one-to-one conversations) but there is limited awareness and understanding of how to more effectively communicate improvements to decision makers.

¹ Please note that examples of individual staff feedback and ideas for improvement can be found in the Appendix.



Detailed findings

Frontline Staff Experiences with Monitoring and Reporting Systems

Objectives

- **Understand how frontline staff capture and report assistance outcomes for both booked and Turn Up and Go (TUAG) services.**
- **Evaluate the usability and uptake of tools (e.g. mobile and desktop tools) in accurately capturing assistance data.**
- **Explore staff confidence in applying processes consistently and comfortably, including their willingness to report when things go wrong.**

The Passenger Assist staff app is the main tool used by staff to monitor and report assistance outcomes for both booked and Turn Up and Go services. The app is typically installed on staff's company mobile phones and is checked at the beginning and throughout staff shifts to see what assists are scheduled. Staff act on this information themselves or coordinate with others as needed. The app is used to view details about upcoming assists, including passenger locations, passenger needs such as wheelchair assistance, and contact information.

Based on feedback from staff in this research, the Passenger Assist app is not used consistently by staff. Staff cite the following as reasons for inconsistent use:

- app glitches,
- WiFi connection issues,
- personal preferences for more traditional methods, like paper-based alternatives or phone calls to other stations,
- limited app training,
- and difficulties recording information on the app during disruptions and short journeys when staff feel more time pressured.

For example, at times of disruption, or if a passenger arrives early, there is limited time to record that the passenger is on an earlier or later train service.

As part of the handover protocol committed to in WMT's ATP, staff must phone ahead to other stations to communicate key passenger information, such as the imminent arrival of passengers who have requested assistance. Staff report this creates another step in the process and can impact the smooth monitoring and reporting of information. For other staff members, they consider recording information on the app to be an additional step in the process compared to their past experience of solely making phone calls to other stations.



**“Instead of reducing work, the app has created more work.
We used to just ring the stations but now we have to do the app too.” – WMT staff**

Not all staff feel confident in knowing how best to use the different app features, especially those who are less confident with technology. These staff will either not use the app or will rely on informal, on-the-job learning with another colleague showing them how to use the app. There is some criticism from staff that the staff app is too complicated and would work better through a simpler set of features to ensure that the key information is captured.

Other staff members question the reliability and accuracy of the information recorded on the staff app such as the location of a passenger on the train, and a lack of up-to-date information being recorded during times of disruption. Feedback suggests that it can be difficult for staff members to record all necessary information in a timely manner and to deliver a best-in-class service in these scenarios. Owing to inaccuracies of information, or lack of detailed information, recorded on the staff app, staff resort to looking for passengers, on a train or platform, without certainty of where a passenger is located.

“It can be confusing as some staff will record that they’re in the third carriage but it’s not clear if they’re in the third carriage from the front or the third carriage from the back. In these instances, a staff member will then find another staff member in person to ask what carriage a particular passenger is in who has requested assistance.” – WMT staff

“It would be ideal to be able to refresh new bookings [on the app] so it’s always up to date. I’d also like the ability to amend bookings when something changes for the passenger, like when they turn up early or want a longer connection time.” – WMT staff

This highlights the importance of improved staff training on the app to strengthen staff confidence and ensure more consistent use of the staff app for monitoring and reporting.

Staff report challenges with Passenger Assist bookings being accepted or created to, from or via stations which are not accessible. For example, instances are shared when wheelchair users have booked Passenger Assist and try to alight a train at stations which are not fully step-free. On-board train staff have to notice the issue in time — by checking the Passenger Assist system — and guide the passenger to a different station which is accessible. This is felt to stop on-board staff from being able to deliver a best-in-class service.

“Another issue is that not all stations are wheelchair accessible. I’ve had wheelchair users get on the train and say that they are going to ‘X’ station. I then have to tell them ‘sorry, but you can’t use that station as it’s not wheelchair accessible’ and then suggest that they go to another station instead.” – WMT staff



There are differing awareness levels of how staff can formally report back when something goes wrong with Passenger Assist. Some staff are confident in the report submission process, and have personally submitted reports, whereas others are not aware of the process at all. That said, even among those who have submitted a formal report in the past, their knowledge of the process and the outcome of the report, or actions taken by the operator in response to the report, is less clear.



Risk Management and Response Mechanisms

Objectives

- Examine clarity around staff responsibilities for delivering assistance, including how these are communicated through job roles and operational handbooks.
- Investigate how operators identify, follow up on, and learn from instances of service failure (especially exploring situations of missed assists).
- Identify examples of recent operational improvements or innovations and explore whether staff perceive these as effective in reducing risk and improving service delivery.

Overall, staff feel clear on their individual role and responsibilities in delivering Passenger Assist. However, limited staffing capacity is felt to prevent staff from confidently and consistently delivering Passenger Assist.

Although staff are clear on their Passenger Assist roles, staffing shortages, unstaffed stations and increasing demand can make delivery and passenger prioritisation more challenging. Staff recognise that delays in support can increase anxiety levels for some passengers if they are not supported quickly, especially at unstaffed stations. The example below highlights an observation from an on-board member of staff.

“I once saw a visually impaired gentleman with a heavy bag alone at an unstaffed station with lots of steps. I went over to ask if he was ok and he said that he was waiting for a member of staff to come and help him out of the station. The station was unstaffed so no one was coming. Situations like this can cause anxiety for passengers.” – WMT staff

As a result of limited staff capacity, staff are resorting to their own decisions about assist prioritisation. For example, prioritising pre-booked and wheelchair users over Turn Up and Go and luggage assist passengers. For Turn Up and Go passengers, staff anticipate that it will take longer to support these passengers given that they have not received information about their specific needs in advance. Staffing capacity and increased demand is felt to limit staff's ability to deliver effectively when under pressure.

“It might be that we've already made a plan for a train but only one member of staff can do it [Passenger Assist], but then we've also got Turn Up and Go. And then that plan goes out of the window. We try and prioritise their [passenger] needs as well as juggle who has actually booked and who hasn't. We try to educate passengers as well and tell them that it would be



better for them if they booked in advance. But I also understand that a lot of elderly people wouldn't have access to an app [Passenger Assist app].” – WMT staff

In terms of learning from instances of service failure, very few staff members recall personal experiences of a missed assist in this research. The general sentiment shared by staff is highly positive with most feeling confident in their ability to successfully deliver Passenger Assist.

Beyond informal conversations with line managers to discuss instances where Passenger Assist may have gone wrong, feedback suggests that there is also limited awareness of more formal channels, where staff can discuss specific incidences when a situation has not been adequately managed and learn from these situations.

The frequency of line manager-employee conversations to discuss challenges depends on the individual staff member's level of comfort and the nature of their personal relationship with their line manager. However, no examples are shared of staff feeding back about any instances of service failure with decision makers and then staff seeing actions or change as a result of WMT following up on these instances of service failure.

“I know that it is better to speak to my line manager when something goes wrong. If there is a complaint, then at least you've told them [line manager]. I've done this in the past when something went wrong with a passenger at the station.” – WMT staff



Opportunities for Staff Engagement and Improvement

Objectives

- **Explore how frontline staff are encouraged to propose improvements and engage in service innovation**
- **Assess the visibility and impact of staff suggestions, including whether new ideas or best practices are well received, implemented and shared across the operator's network or sector-wide**

Staff are involved in broad conversations with their line managers around daily issues and challenges, but there is no clear formal channel with decision makers at WMT for staff to propose improvements and engage in service innovation. While there is a reporting system in place which some staff are using for logging more serious issues with Passenger Assist delivery, there is very limited awareness of how to suggest improvements or new ideas at a wider operator level.

While staff feel that there is a clear forum to discuss and be transparent about mistakes and challenges with regards to Passenger Assist with their line managers, there are limited channels and forums for encouraging staff to suggest ideas to address bigger challenges with Passenger Assist.

Feedback indicates that staff are not always fully confident that sharing their input with decision makers will lead to meaningful change or solutions. A lack of confidence in broader systemic change can discourage staff from sharing feedback or ideas — particularly if they have previously made suggestions and felt it took a long time for any visible change to happen.



Effectiveness and Impact of Training Programmes

Objectives

- **Understand staff experiences of disability awareness and assistance training, particularly whether training incorporates lived experience, enables reflection, and builds confidence.**
- **Explore training materials in terms of relevance, engagement and whether fit for purpose? Explore the feedback loop on training.**
- **Does the training content adequately prepare frontline staff to meet the needs of disabled customers requiring Passenger Assist both in terms of hard and soft skills? Where do they feel more, less confident?**

There is very mixed overall awareness, and experiences of, disability awareness and Passenger Assist training. Delivery of training is inconsistent, and refreshers are felt to be minimal.

Feedback on training relates to three key areas: frequency, content and the opportunity to put learnings into practice.

Frequency

Most staff can accurately recall their induction and early training experiences but recall of more recent training, including refresher training, is patchy. In some cases, staff report that they have not completed refresher training sessions for many years and recall of formal training, through e-learning and classroom-based training, is very mixed. As a result, staff try to learn and upskill on the job.

Positively, for staff who are new into their roles at WMT, they praise the aspects of the disability awareness training, as part of their induction, that helped to increase their knowledge levels of how best to support passengers with specific needs. For example, one staff member reflects on the usefulness of the training he received on supporting visually impaired passengers.

“There was an afternoon where the disability team from Head Office came in, and we were given a lot of very good training on how to support passengers with different disabilities. That was very good and very worthwhile. I don't personally really know a lot of visually impaired people so knowing how to support visually impaired passengers, you know, the rights and wrongs, I found that training really helpful.” – Station staff, WMT

Content

Passenger Assist staff app training is very minimal or non-existent and is not felt to be as formal as it could be. Most staff report that they simply learnt on the job through another colleague showing



them how to use the app. The lack of formal app training is a particular concern among staff who are less confident with technology.

“I don’t think we’ve received any training on how to use the app, or if I have, it was a very long time ago and I don’t remember anything about it.” – WMT staff

Putting learnings into practice

In-situ training focuses primarily on kit and equipment. Staff report that they are required to complete safety briefs or competency checks, such as practising how to put a ramp down effectively. In general, staff report that they are confident in fulfilling core, practical assist tasks such as safely deploying and stowing ramps and supporting wheelchair users.

Staff have limited recall of training focused on understanding the specific needs of different passengers, including those with visible and non-visible disabilities, or do not feel that this training has been rolled out consistently, or as frequently as required, for all staff. This can decrease staff’s confidence and knowledge levels when supporting passengers, especially passengers with non-visible disabilities.

“We get safety briefs where there is a focus on treating everyone with respect but, apart from that, we haven’t really had much disability awareness training. There needs to be more around not every disability being visible.” – WMT staff

Feedback highlights that limited staffing capacity prevents some WMT staff members from being released from their duties and, as a result, they are not always able to take part in training sessions.

There is some recall of having received feedback surveys following training sessions, but not all staff had taken the opportunity to share their feedback or could recall having received such a survey. Although those who had received a survey appreciated it, there is little evidence that they personally used it as an opportunity to share their ideas for change or innovation.

“When we’ve completed training and safety briefs, we can provide feedback and say what we think won’t work. The offer has been there, but I’ve not done any personally.” – WMT staff



Appendix

Additional staff feedback

- **Designated Passenger Assist staff:** To overcome challenges with a growing demand of passengers requesting assistance, staff recommend the appointment of designated Passenger Assist staff.
- **Increasing allocated space for disabled passengers on board trains:** At present, it is felt that there is not always sufficient space on trains, especially to accommodate the needs of wheelchair users. Feedback suggests that the large amount of luggage on certain train services can also reduce the accessibility of the space.



Qualitative discussion guide

Introductions and Scene Setting - 5 minutes

Aim: To explain the nature of the research, and understand both day-to-day responsibilities and specific station context and how Passenger Assist is delivered within station environment

- Moderator to introduce self, 2CV as the independent agency running this research and thank staff members for their time
- Moderator to explain the nature/objectives of the interview: To capture staff feedback on their experiences and feedback when supporting customers through Passenger Assist.
- Moderator to explain confidentiality, anonymity and audio/video recording
- Reassure there is no right/wrong answer, and this is a safe space to speak freely – moderator to reiterate that we want to hear their honest and open feedback
- Remind them of session length – group conversation will last for 45 minutes
- Answer any questions staff members may have

Staff members to introduce themselves, ice breaker and provide station context

- Ask staff to introduce themselves: first name, which station / depot they work at and explain day-to-day responsibilities including delivery of Passenger Assist service
- What do they love about their station?

Scene setting

- How is Passenger Assist typically organised at their station or onboard?
- What type of customers do they typically support for Passenger Assist?
 - What is unique about their customers? Considering size of station, layout of station, local area and specific customer profile etc.
- What makes their station context easier for delivering Passenger Assist?
 - For 'guards', we will explore their context in general, not specifically for the station.
- Considering size of station, layout and specific customer profile (i.e. type of impairment or accessibility need)
- What makes their station context harder or more challenging for delivering Passenger Assist?
 - Considering size of station, layout and specific customer profile



Reflections on Passenger Assist delivery - 10 minutes

Aim: To gather spontaneous feedback on what is working well and less well and identifying common issues or gaps in terms of process, tools or communication

- Capturing spontaneous feedback:
 - What is currently working well when it comes to delivering Passenger Assist to customers?
 - How often does the service delivery go well / less well?
 - What specific examples can staff share when it has gone well / less well?
 - What do they think causes service delivery to go well or less well?
 - Probe: peak versus off peak times, lack of staff, service delays etc
 - How clear are they on their role in delivering Passenger Assist?
 - How would they describe the organisation of Passenger Assist and who is responsible for what?

Moderator to listen out for examples of external drivers e.g. not having appropriate tools or not knowing the location of a customer. The overall aim is to listen out for staffs' ability to deal with these situations and what support they are given in these moments vs. staff just saying 'It's not our fault'.

- What examples can they share when customer interactions or situations are more likely to go wrong?
 - Probe: alighting, handovers between staff members etc
- How do they know when customers are satisfied with the Passenger Assist service?
- What are the signs of dissatisfaction?
 - Did staff feed this back? Why / why not? (Aiming to understand how staff are identifying and resolving problems).
- How does time of day / week impact service delivery?
- How does customer need impact service delivery?
- How does customer journey impact service delivery?
 - Probe: end destination – or interchange



Monitoring and Reporting Processes – 10 minutes

Aim: To understand how Passenger Assist is monitored and reported through exploration of current processes and level of staff confidence in using tools and reporting back when something goes wrong

- Staff members to provide an overview of the current processes for monitoring and reporting
 - By 'monitoring', we mean monitoring of completions. Moderator to keep in mind that high-level, longer-term monitoring is not within the remit of frontline staff.
- Are there situations where assistance is not recorded, or situations where it feels unclear what should be done (both pre-booked Passenger Assist and Turn Up and Go)?
 - What specific examples can they share?
- How confident do they feel in using the current tools or systems?
 - What is their typical usage?
- Probe: Usage of Passenger Assist staff app and staff PA system
 - Listen out for: Proactive vs reactive use of tools and systems and drivers for this
 - Moderator to note that the PA system is a management platform for Passenger Assist and can be accessed in two ways: 1) Staff web interface ("staff dashboard") and 2) Passenger staff app
- What is the process for when something has gone wrong with Passenger Assist?
 - Moderator to explain by this, they mean when a process is not followed and there are 'missed assists'.
- How confident do they feel in reporting this to senior colleagues?
 - What encourages them or makes them feel less comfortable to report this?

Training Experience and Impact – 10 minutes

Aim: To explore staff training experiences using the Kirkpatrick Model – a training evaluation model for evaluating the effectiveness of training

- Moderator to explain that we are now going to explore the topic of training – specifically training for Passenger Assist and disability awareness and assistance training:
 - By training, moderator to refer to the information at the end of this discussion guide and provide examples to staff as needed.



- Staff members to start off by providing a brief overview of the training they have completed for Passenger Assist
 - How is ongoing training managed? Do they receive refresher training or competency checks?
- Moderator then to explore each of the below elements:
 - Reaction: How did they feel about the training when they completed it? Was it engaging and relevant? Why / why not?
 - Learning: What new knowledge or skills did they take away from it? Did anything surprise or challenge them?
 - Behaviour: How have they applied what they learned? Can they give examples?
 - Results: What difference do they think the training has made to how assistance is delivered?
- Do they feel that training adequately prepares them to meet the needs of disabled customers requiring Passenger Assist?
 - Where do they feel more and less confident?
 - Probe: hard and soft skills
- Have staff provided any feedback on training received? Why / why not?
 - What happened as a result when they did feed back?
 - Moderator to listen out for feedback loops and the extent to which it feels like TOCs are interested in making improvements and where it sits in terms of overall priorities.

Improvements and Wrap-Up – 10 minutes

Aim: To understand TOC commitment to improvement based on staff feedback and ideas, and any changes that staff would make to improve how assistance is delivered in the future

Moderator to re-iterate that this is a really key section - we'd love to hear their final feedback and ideas for change.

- Have staff shared any ideas and feedback when it comes to improving the delivery of the Passenger Assist service?
 - What has encouraged them or held them back from doing so?



- How (if at all) are ideas and feedback listened to and acted on?
- Have they been involved in any changes to the delivery of Passenger Assist?
 - What was that experience like?
- Do they know if there are ways for sharing best practice between teams or stations?
 - Have they learnt from any best-in-class examples?
 - What impact did this have?
- What tools, processes or ideas have they seen which they think could be useful?
 - Probe: it could be from another TOC or a completely different sector or service type
 - Why is this effective?
- Finally - if they could change or improve one thing about how Passenger Assist is delivered, what would it be?

Wrap up and thank staff members for their time and contributions