# Social media workshop summary note

**Date: 30 September 2015**

**Time:  11:00 to 14:00**

**Location: ORR offices, 1 Kemble Street, Holborn, WC2B 4AN**

**Attendees:**

- **Chair** - Dr Scott Hamilton (SH) – ORR
- Kasia Majkut (KM) – ORR
- Chris Casanovas (CC) – ORR
- Lisa Pender (LP) – ATOC/NRE (attended first half of the meeting)
- John Till (JT) – Southeastern
- Pamela Johnson (PJ) – Cross Country Trains
- Matthew Breese (MB) – Arriva Train Wales
- Emma Gascoigne (EG) – Chiltern Railways
- Danny Carden (DC) – ScotRail
- Natalie Surman (NS) – East Midlands Trains
- Nick Wood (NW) – Virgin Trains East Coast
- Rich Shilton (RS) – Virgin Trains West Coast
- Kim Griffin (KG)  – South West Trains

**Apologies:**

Garry Kemp – Abellio Greater Anglia

**Acronyms:**

**TOC:** Train Operating Company

**PIDD:** Passenger Information During Disruption

**CHP:** Complaints Handling Procedures

**DPPP:** Disabled People's Protection Policy

**Summary of main discussion:**

*Introduction and overview*

The meeting began with introductions and a short presentation by SH on the background to the social media working group. SH explained that the origins of the social media working group stemmed from ORR's previous interest in including social media performance indicators relating to CHP within its core data work stream. However, upon closer engagement with TOCs it had become clear that there were challenges around identifying a unit of analysis that was both an accurate measure of individual TOC performance whilst at the same time allowing for meaningful comparative analysis across all TOCs. For this reason, ORR had decided to exclude any social media indicators from its core data work for the time being.

Nonetheless, SH explained that ORR had received strong support from industry to establish a working group to help better understand some of the issues TOCs' social media operations were presenting at an industry level and would welcome the opportunity to discuss these issues in a more formal setting. ORR was supportive of this and had responded by arranging the social media workshop to examine some of these issues.

The following questions were then discussed:

1) **What value is social media adding for TOCs and passengers?**

- The group discussed the fact that social media has become one of the primary channels for communicating with passengers. There was broad consensus that a social media presence has become the norm for TOCs and that it was clearly adding value for customers and TOCs alike. For example, it provides passengers with quicker, and often better, responses than more conventional means of communication have done in the past. At the same time, it also allows TOCs get immediate feedback on their customers' experiences which they can use as intelligence for making customer service improvements.

- LP stated that ATOC has been considering establishing a social media working group in recognition of the growing importance of social media to TOCs' customer engagement strategies. SH gave reassurance that, should ATOC's create such a group, it would be happy to support this where possible.

- Of the various social media channels used by TOCs to engage with customers, there was broad recognition that Twitter represents TOCs' primary mode of communication with passengers.

- Some interesting points about TOCs' experiences of interacting with passengers through social media were noted:

  o TOCs have to be attuned to their Twitter audience's preferences. E.g. some TOCs explained they use Twitter as means of providing passengers with essential travel information as well as marketing or campaign material. In contrast, some commuter-oriented TOCs stated their customers did not appreciate marketing material, leading them to almost solely focus on providing passengers with essential travel information.
  o Facebook is often used for marketing purposes rather than dealing with customer enquiries, meaning it will be used by some TOCs more than others depending on the profile of their customer base.
  o The type of passenger-initiated engagement was also different depending on the TOC's passenger profile. For example, commuters are more likely to complain if their

journey is two minutes late, whereas long distance passengers
will often tolerate small delays more willingly but more readily give feedback about
other aspects of customer service that are otherwise less important to commuters.

- The group also noted that social media has become one of the primary drivers of customer service improvement for TOCs.  E.g. Tweets can be categorised and analysed and used to provide a rich form of customer insight to inform organisational decision-making.  TOCs provided a number of examples of where this had taken place within their business.

- The value Twitter adds in so far as helping TOCs to proactively resolve an issue before it becomes a complaint was also discussed.  Customers are increasingly viewing Twitter as short cut to a quick answer, which presents a challenge to TOCs because typically these passengers expect an almost immediate response. However, for TOCs who use social media effectively, it can provide them with an opportunity to address and potentially rectify the problem at an earlier stage, thereby preventing it being escalated further.

## 2) What are the key issues TOCs are experiencing in social media engagement with customers?

- Twitter was acknowledged as the primary channel for providing passengers with an outlet to vent their frustrations at the TOC, regardless of whether the issue causing the passenger's frustration was the fault of the train operator or not. In some sense, therefore, TOCs felt they were often an easy target for negative feedback because of how easily accessible they are via their social media operations.

- TOCs noted an increasing problem of passengers making comments and sometimes taking photographs of staff when complaining or expressing dissatisfaction through social media. Where this arises TOCs' usual practise is to contact the person to request that these tweets are removed. TOCs are nonetheless concerned about this, as are some rail unions.

- For some TOCs the use of Twitter has, to some extent, reduced the number of telephone enquiries and complaints made to TOCs by passengers.  A number of interesting examples of this at different TOCs were discussed. It suggested that increasing a TOC's social media presence can, in some cases, help them pare back on the headcount at traditional contact centres thereby helping to lower overall costs. Conversely, other TOCs noted they had not experienced this shift, noting that their volume of calls and written correspondence had remained fairly stable despite increasing their social media presence.

- TOCs explained that in recent times there has been a growing recognition at senior management level within their companies about the value added by a strong, professional social media presence. There was now a general consensus at board level that social media can improve customer service and at the same time, in some instances, help lower costs for the business.

- The rapid growth in demand for social media professionals has meant that TOCs often find it challenging to recruit the right staff in this area.

- There was some recognition that in recent times there is a trend towards TOCs bringing social media operations in-house and moving away from having this outsourced to a third-

party provider. Several examples were given to illustrate how the in-house approach can be more efficient and effective (e.g. passengers get quicker and better quality of responses because the social media teams themselves get better and quicker information from the key parts of the business due to their proximity).

### 3) What social media platforms and analytical software is everyone using?

- Discussion of this was limited because of the commercial sensitivities around this. In general, however, it was recognised that key analytical software such as SoDash, Conversocial and Hootsuite were among the most popular packages used at the minute in the rail industry.

### 4) Are there generic problems that would benefit from a common approach?

- TOCs were hesitant to discuss common approaches to generic problems in any great detail due to the potential commercial sensitivities involved. TOCs stated that knowledge sharing within the owner group is more preferable than sharing ideas or information with competitors. For this reason, there was some consensus that, in terms of social media, only high-level knowledge sharing was considered to be acceptable.

### 5) What would guidance or standards look like, and would it be monitored?

Following a lengthy discussion about the possibility of developing some guidance or standards on TOC use of social media, some consensus was reached on the following points:

- TOCs felt there was no obvious argument for regulation in this area because, at this time, the industry was generally providing a good level of service to passengers through social media relative to many other sectors. In the event some standards or guidance was devised, there was a general view that TOCs would, by and large, already be performing to this standard anyway, meaning it would merely create some additional regulatory burden without necessarily adding value for the customer.

- The group also noted that, because of the different styles of engagement achieved through each of the different social media platforms, potentially you may require guidance for each social media channel. Consequently, there was a danger that it could become overly onerous for both the regulator (in terms of producing or approving of these various bits of guidance) and for the industry to implement.

- It was also noted that it is now commonplace for franchise agreements to specify that TOCs must provide a social media service to passengers, but does not usually prescribe how this should be done in any detail. One reason for this is because social media evolves so quickly that any specifications set out in a ten-year franchise agreement are likely to be quickly rendered out-of-date and obsolete.

- TOCs agreed that it is difficult to define a common, best practice approach to customer engagement through social media at an industry level due to differences amongst them in their approach (no "one size fits all"). Several interesting examples of the contrasts between TOCs social media audiences, and the way individual TOCs tailor their responses according to their specific audience, were given.

- TOCs also discussed how they learn a great deal about best practice in social media policy from other industries – particularly airlines, rather than from each other, *per se*. For example, Arriva Trains Wales publishes its own social media policy document on its website

(includes information such as Twitter opening hours) which is internally periodically reviewed to ensure it remains up to date. They explained this practice originated from what they learned from looking at other sectors.

### 6) What are the interactions between TOCs' social media operations and CHP, DPPP and PIDD?

- With regards to CHP, TOCs explained that it was common practice to offer those who had made a clear expression of dissatisfaction the opportunity to escalate this into a formal complaint via their dedicated complaint handling channels. Typically, this would involve directing the passenger to the relevant page on the website, webform or email address.

- In relation to DPPPs, assistance is booked through a TOC's dedicated assistance booking telephone line or online. Nonetheless, if a passenger contacted the TOC through social media to request assistance for their journey, the TOC would contact the relevant assistance team and ask them to assist the passenger.

- The group also discussed how their social media operations interact with their PIDD obligations. It was noted that there were two primary PIDD obligations that pertained specifically to social media activities, and that good practice in this area is expected to be published by the end of the year. In general terms, TOCs explained that social media, mainly Twitter, was now the primary mode of communicating with individual passengers during periods of disruption.

### 7) Other

- The "Short and Tweet" report published by Transport Focus in 2012 was discussed. Some TOCs stated that this research drew vastly different conclusions to their own customer research. They were also disappointed that they had not been given an opportunity to comment on the 2012 report before it was published. It was noted that Transport Focus plans to produce another report in this area soon, and so it was suggested that allowing TOCs to have some sight of the findings for a 'sense check' before it was published would be helpful. ORR took an action to speak to Transport Focus about this.

- In terms of future social media workshops hosted by ORR, the majority of TOCs were of an opinion that the meeting was worthwhile and informative, but that it should not meet too frequently (e.g. perhaps once a quarter). ORR also agreed to engage with ATOC to discuss how it may support their proposed social media working group.

- ORR agreed to circulate a draft note of the meeting to attendees before putting it on its website.

**Actions:**

1) SH and LP to discuss ATOC's proposals for a social media working group.
2) Arriva Trains Wales to share their social media policy with ORR. **ACTION COMPLETE**.
3) ORR to raise TOC concerns about social media research with Transport Focus

4) ORR to produce a note of the meeting and share with participants before publishing it on its website alongside the slides. **ACTION COMPLETE**