



RAIL DISRUPTION REPORT

The Customer Perspective: Data-Backed Insights into UK Rail Replacement Performance.

We asked 1,500 rail and non-rail users about their experiences and hopes for rail replacement services - from personal impact to ideal solutions. Unlock the secrets for rail customer delight during planned and short-notice disruption.

GREAT BRITISH

Rail Replacement

A **cmac**. group company

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Disruption remains one of the most defining – and damaging – pain points for UK rail customers.

Research commissioned in 2025 with more than 1,500 rail users and non-users reveals widespread dissatisfaction: 92% of respondents believe disruption management has deteriorated or remained unchanged, while only 8% report improvement. Key issues include poor communication, lack of accessibility, vulnerability during travel, rural disadvantage and generational differences in response to disruption.

As Great British Railways (GBR) prepares to unify standards and rebuild public trust, rail replacement operations, both for planned engineering works and short notice disruption, represent a clear and immediate opportunity for visible improvement.

This report outlines the key insights from a national customer study that we commissioned and demonstrates how modern, standardised rail replacement services can directly support GBR's mission of delivering a simpler, more reliable and more customer-centric railway.

Foreword.

Now more than ever, we have a unique opportunity to redefine how the railway delivers rail replacement services. Societal shifts accelerated by the pandemic and the evolution of the rail industry, with structural change in progress, have created the perfect moment to improve the customer experience during both planned engineering work and unexpected disruption.

Despite its importance, rail replacement has often been overlooked, sidelined in planning, or treated as a secondary concern. This cannot continue. Disruption may be inevitable, but the customer experience does not have to be poor. It is during these moments that customers judge the railway, and trust is either strengthened or eroded, irretrievably so.

Over my 45+ years in the rail sector, including more than two decades focused on rail replacement, I have seen what works and what does not. Too often, poor experiences dominate the public's perception. With growing investment in infrastructure, the need for reliable, high-quality replacement services is increasing. As well as being operationally necessary, these services are central to customer satisfaction and loyalty.

This White Paper presents the Great British Rail Replacement's blueprint to transform rail replacement, focusing on high quality coordination, consistency and customer-centricity across every touchpoint. From planning and station staff to drivers and service providers, everyone has a role to play in delivering excellence.

With focus, collaboration and determination, we can make rail replacement a positive, reliable and trusted part of the railway experience. Great British Rail Replacement is committed to leading this change and setting a new standard for the industry.



Ian Jeffrey.

Director, Great British Rail Replacement.



01

Why rail
replacement
matters now.



Building trust through better rail replacement services.

The transition to Great British Railways (GBR) marks a fundamental shift towards integrated planning, consistent national standards, and improved customer outcomes.

Disruption will remain inevitable across a complex and ageing network - whether due to planned engineering work or unplanned incidents. However, the customer experience during such disruptions is currently unpredictable and often substandard.

Rail replacement is no longer a marginal operational activity; it is central to customer satisfaction, brand trust and operational resilience. Improving this area offers Great British Railways a high visibility, high impact opportunity to demonstrate early change.

There are four key reasons why rail replacement, including planned - to cover engineering works - and 'short notice in-service' disruption, must be prioritised:

- ▶ **Disruption defines customer perception more than routine journeys.**
- ▶ **Inconsistency across Train Operating Companies (TOCs) and regions contradicts GBR's goal of unified national standards.**
- ▶ **Accessibility and rural equity failings create reputational and ethical risks.**
- ▶ **Customers are asking for clear standards, better information and trained staff, not complex reforms.**

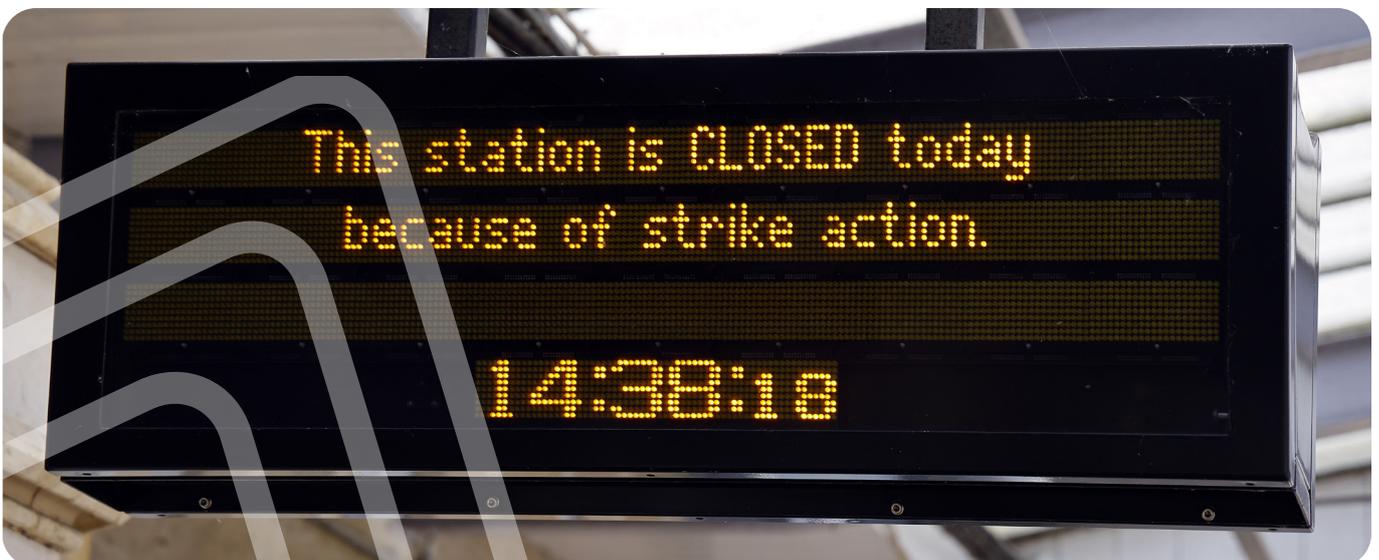
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**National insights on
customer experiences
during disruption.**



What the data reveals about customer impact.

- ▶ Customer dissatisfaction is high: **92% report worsening or stagnant disruption management**, with only 8% noticing improvement.
- ▶ Information and communication gaps: Customers report unclear signage, poor announcements, and under-informed staff, leading to confusion and stress.
- ▶ Accessibility failures: **Only 2.8% of customers with accessibility needs find replacement services fully accessible**; 30% were left without a viable alternative during disruption.
- ▶ Vulnerability and safety concerns: **33% of women relied on others for completion of their journeys** due to safety.
- ▶ Rural disadvantage: **19% of rural customers cancel plans due to perceived inadequate provision during disruption**; Yorkshire and the Humber saw 22% of customers stranded.
- ▶ Generational divide and digital demand: **33% of customers aged 18–34 seek alternative transport when disrupted**; 40% want real-time updates via apps or websites.
- ▶ Cautious optimism about renationalisation: **42% of rail customers are unsure that it will improve services**, while 36% believe it will.



What's going wrong?

Disconnected planning:

Operators and replacement service providers often fail to coordinate demand forecasting, leading to overwhelmed or underused services.

“ Not impressed with current services when (and regularly) caught up in them. There's a lack of information, lack of capacity and lack of organisation on the ground. Train companies need to improve all three. ”

Business customer, London Paddington Station.

Inconsistent communication:

Signage, announcements and real-time updates vary across locations, leaving customers uncertain.

“ The journeys are so much longer, and you can wait ages in the cold. Signage also needs to be better at stations – there are too many posters, so you miss the important ones. ”

Leisure customer, Flitwick.

“ Too long a journey and difficult to find coaches at the station, I would definitely put off travelling if I knew there was disruption. ”

Leisure customer, Liverpool Lime Street.

Safety and accessibility:

Customers, particularly those with disabilities or women travelling alone, encounter unsafe or poorly supported routes to replacement services.

“ I got on a service bus by mistake then the driver told me to get off. I then ended up going in the wrong direction so eventually used ride hail. I felt insecure when travelling due to the rail replacement service and not knowing where to go. ”

Leisure customer, Kingston (female, 21)

“ I avoid these late at night. Train companies should offer girls taxis every time instead. ”

Leisure customer, Stratford.

Generational differences:

Younger customers rely on digital tools and alternative transport, while older customers are more likely to cancel.

“ I would rather go on a different line or cancel my plans than do a replacement bus as they are very slow and not as comfortable as a train. ”

Leisure customer, Luton.

Rural and urban inequities:

Service provision is inconsistent, with rural customers disproportionately affected.

“ There were no trains to Blackburn, so I travelled by public bus. The journey took a bit longer but was scenic and only cost £2 and the on-board comfort was better and less crowded. It was also difficult at Preston station to find the rail replacement buses. ”

Leisure customer, Preston (Lancs) Train Station.

“ I have little confidence in availability and reliability of rail replacement buses, coaches and taxis. ”

Leisure customer, Ashford International Station.

“ My experience was good because the bus wasn't very busy, but the lack of available information left me feeling confused. Getting on the bus felt like 'getting on and hoping for the best,' and because of the extra effort and uncertainty, I would avoid rail replacement services in the future. ”

Leisure customer, Haslemere.

What customers want.

- ▶ Reliable, consistent replacement services across all locations.
- ▶ Clear, real-time information delivered through multiple channels.
- ▶ Accessibility for all customers, including step-free access, suitable vehicles and trained staff.
- ▶ Additional safety and visibility measures for vulnerable passengers.
- ▶ Coordination between operators, station staff and replacement providers.
- ▶ Digital tools for real-time updates, journey planning and incident reporting.
- ▶ Discounted fares during planned engineering works (30% called for this).





03

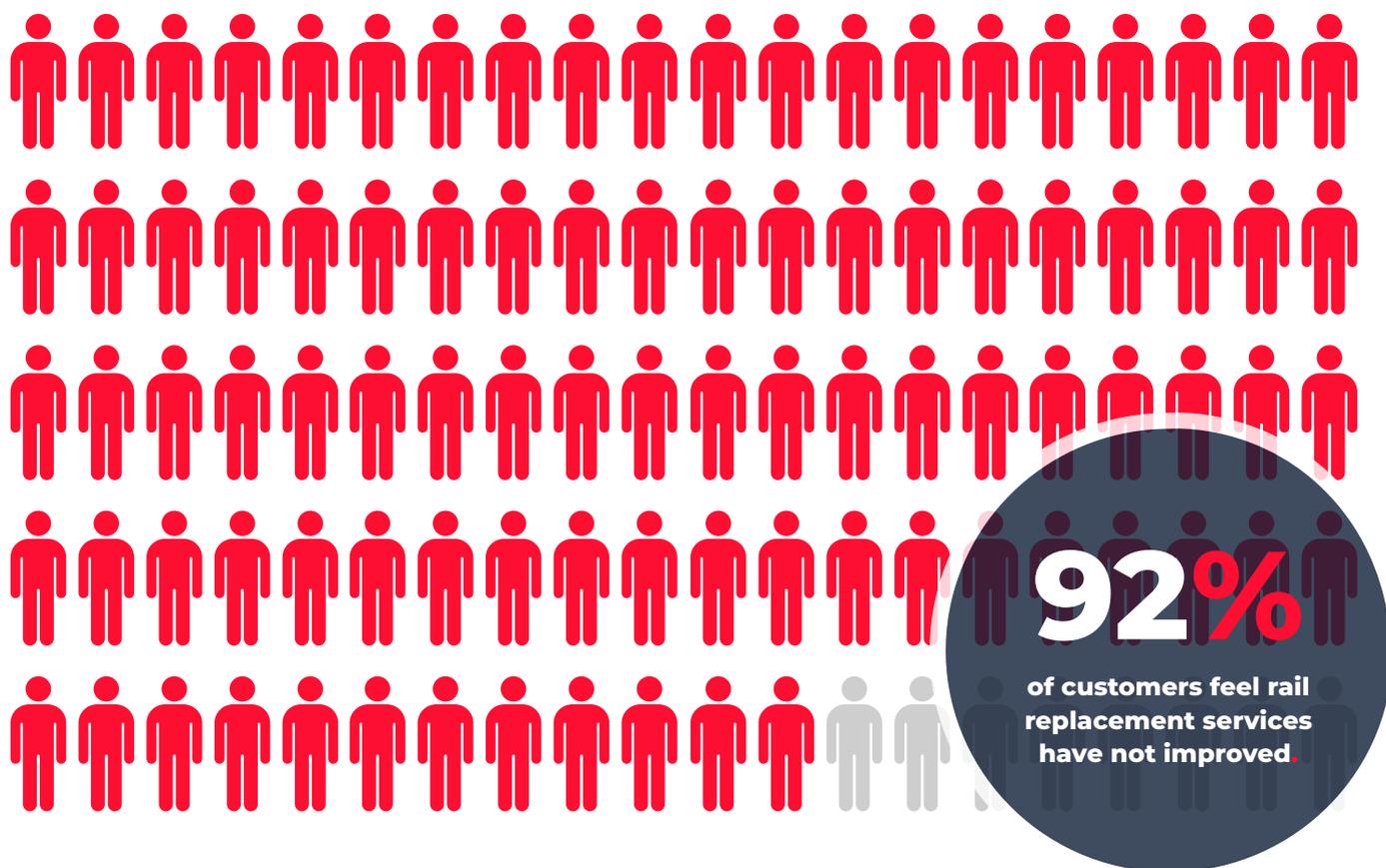
Implications for
GBR stakeholders.

Strengthening public trust.

Disruption is the moment when trust is won or lost. Our research shows that **92% of customers feel rail replacement services have not improved over the past year**. This dissatisfaction is not due to a lack of intent - customers recognise operators often try to do the right thing - but poor execution, inconsistent service delivery, and under-resourcing undermine confidence.

Key pain points include disconnects between rail planners and replacement providers, signage and communication inconsistencies, inadequate contingency planning, and unreliable real-time information. Even when services go well, good practice is often localised rather than network-wide, meaning customers cannot rely on consistent standards.

With frequent maintenance, infrastructure upgrades, and industrial disruption affecting the UK rail network, customers expect a consistent, coordinated minimum standard for replacement services. By improving reliability, communication, and service quality, GBR can demonstrate tangible progress that rebuilds confidence in the national rail network and reduces the risk of losing passengers permanently.



Enabling national consistency.

Regional variation creates fragmented experiences, with some areas delivering fully accessible, well-signposted rail replacement services, while in others, customers are left stranded. Great British Railways unified structure is uniquely positioned to standardise service quality across the network, ensuring customers know what to expect wherever they travel.

Public confidence in the impact of GBR is cautious: only 36% believe renationalisation will improve rail replacement provision, 42% are unsure, and 22% expect services to worsen. This uncertainty represents a chance to reset the strategy, placing customers at the centre and establishing consistent, high-quality standards for both planned and unplanned disruption.

“ Not impressed with current services...
lack of information, lack of capacity,
lack of organisation. ”

Business customer, London Paddington Station.

“ I’m a shift-worker [NHS Nurse] so any rail
replacement makes my days even longer.
Can there be taxis for key workers maybe? ”

Business customer, Upminster.



Meeting accessibility obligations.

Rail replacement is a critical touchpoint for disabled customers: people can be stranded, forced to rely on unsuitable transport, or face unsafe conditions.

Only 2.8% of customers with accessibility needs report fully accessible rail replacement services, and **30% say they had no viable alternative mode of transport when disruption occurred.**

GBR has an opportunity to lead by embedding accessibility as a foundational principle in every rail replacement journey, ensuring disruption does not exclude or disadvantage customers, and delivering a fairer, more inclusive railway.

Key challenges reported by disabled passengers:

- ▶ Limited availability of staff to assist with rail replacement services.
- ▶ Variable knowledge and attitudes of staff coordinating or delivering services.
- ▶ Insufficient seating or space on replacement vehicles (buses, coaches, taxis).
- ▶ Lack of information about accessible options in advance.
- ▶ Physical barriers boarding or exiting replacement vehicles.
- ▶ Communication barriers before and during journeys, including websites, helplines, social media, audio announcements, and signage.



Levelling up rural communities.

Survey feedback indicates that rural communities experience disproportionate disruption from rail replacement services. Customers often face complete service gaps, limited journey alternatives, and unclear or insufficient real-time information, which amplifies the sense of remoteness and vulnerability.

There is **strong regional support for discounted fares during rail replacement - particularly in Wales (40%), Yorkshire and the Humber (39%), and the Southeast (38%)** - reflecting the frequency and impact of these disruptions. Introducing a region-specific “Disruption Flex Fare” could help maintain customer loyalty and serve as a tangible mitigation measure alongside existing ‘Delay Repay’ provisions.

Improving rail replacement services in rural areas supports government levelling up objectives while expanding access and equity for communities that rely on rail transport.

Adapting to generational expectations.

Rail replacement affects not just travel, but how different age groups respond to disruption.

Younger customers (ages 18–34) are digitally agile and price-sensitive: **33% choose alternatives such as buses, ride-shares, or walking rather than deal with delays, viewing disruption as an unavoidable inconvenience.** They prefer real-time updates via mobile apps and are more likely to trust digital information over staff guidance, highlighting the need for intuitive, multi-modal digital platforms with journey simulators, geo-based alerts, and fare incentives.

In contrast, **customers over 55 are 47% more likely to cancel journeys outright**, citing accessibility concerns, unfamiliar boarding points, and on-board comfort. Across all age groups, trust hinges on accurate, timely information; failures in communication during both planned and unplanned disruption undermine confidence and can drive customers to avoid rail altogether.

“ I wouldn't travel if there were engineering works, as I struggle with mobility and it would make me worry. ”

Leisure customer, London Kings Cross Station.



04

**Recommended
actions for rail
stakeholders.**

Rail replacement transformation: 10 key actions.

Based on national research and the voice of the customer, these ten strategic priorities define what excellent rail replacement must look like. Together, they provide a practical charter for transforming rail customer experience during disruption.

1. Deliver consistent, high-quality rail replacement services through coordinated procurement.

Centralise procurement where feasible to improve service reliability, consistency and value, while ensuring fairness, transparency and the avoidance of conflicts of interest.

2. Put customer service before price.

Procurement of replacement services should prioritise customer satisfaction and experience, not just lowest cost. Contracts should include clear service-level standards and customer-focused KPIs. Consider disruption flex fares.

3. Introduce a national rail replacement standard.

Establish a Rail Replacement Quality Mark with defined operational, accessibility, and service criteria, monitored via independent audits. This standard should set consistent expectations across the network for:

- ▶ Information delivery
- ▶ Accessibility
- ▶ Vehicle quality
- ▶ Staff training
- ▶ Performance metrics
- ▶ Contingency protocols

It should also provide transparency for GBR, TOCs, and the public, and enable local accountability and continuous improvement, ensuring all operators deliver a consistent, high-quality, and inclusive replacement service.

4. Ensure every touchpoint is customer-ready.

Rail replacement staff and service providers must receive customer-focused training including real-time problem solving, communication, and accessibility awareness. Training effectiveness should be regularly evaluated.

5. Plan works with the customer in mind.

Use real customer data to plan engineering works, schedule replacements outside peak hours where possible, and coordinate across operators to reduce disruption.

6. Operate as one team.

Establish coordinated briefings and shared operational updates across station staff, replacement service providers, and coordinators to deliver a seamless customer experience.

7. Make accessibility an industry priority.

Co-design services with disabled customers, mandate accessible vehicles, provide step-free routes, and ensure visibility of accessibility information at all stages of the journey.

8. Serve rural areas better.

Collaborate with local transport partners to ensure signage, communication, and reliable replacement options in rural areas.

9. Invest in digital tools and smart information.

Provide real-time updates, integrated journey planning, accessibility visibility, and support tools for disrupted rail customers. Apps and systems should complement, not replace, staff guidance. Adopt scalable, technology-enabled service models to ensure digital tools can grow with demand and deliver consistent, reliable information across the network.

10. Brand rail replacement clearly.

Ensure vehicles, pick-up/drop-off points, and station signage are clearly marked, recognisable, and accessible. This includes tactile and high-contrast signage, audible announcements, and trained staff available to guide customers who are blind or partially sighted. Consistent, inclusive branding improves confidence, reduces confusion, and ensures all customers can navigate replacement services safely.

Conclusion.

Rail replacement is not merely a contingency measure - it is a vital component of customer experience and an immediate lever for improving national satisfaction. As GBR prepares for its formal launch, modernising rail replacement services offers a clear, practical opportunity to deliver visible improvements that align with its commitments to simplicity, reliability and customer focus.

By adopting national standards, improving real-time communication, and ensuring equitable access for all disrupted rail customers, GBR can take a decisive step toward rebuilding trust in the UK rail network and delivering a more connected, consistent, and compassionate railway for everyone.

Great British Rail Replacement transforms the planning and delivery of bus, coach, and taxi services during both planned engineering works and unplanned disruption.

This report is brought to you by Great British Rail Replacement.

Great British Rail Replacement was launched in 2024 to transform the planning and delivery of replacement transport during both planned and unplanned rail disruptions.

Managed by CMAC Group, which facilitates over 5 million journeys annually across rail, aviation, and B2B/B2C sectors, the initiative focuses on maintaining journey continuity, supporting customers, and raising industry standards. Services are designed to be reliable, consistent, and accessible, ensuring that disruption is managed with confidence rather than frustration.

Rail disruption remains a significant challenge across the UK. Over 300,000 trains are cancelled annually (ORR, Nov 2024), and 92% of customers report that disruption has either worsened or not improved in the last 12 months. Inconsistent replacement services, slow journeys, and minimal customer information can all contribute to dissatisfaction and erode trust in the network.

Great British Rail Replacement seeks to address these issues by co-ordinating integrated, customer-focused solutions that prioritise efficiency, accessibility, and care. By coordinating accessible and audited buses, coaches, and taxis in a cohesive framework, the initiative ensures that passengers experience seamless travel even during disruption, transforming what was once a frustrating experience into one managed with confidence.

Contact our team today: GBRR@cmacgroup.com