

Caledonian Sleeper: understanding passengers' expectations and experiences

Executive summary

Introduction

This report summarises the key findings from the qualitative research programme carried out by Quadrangle, an independent research agency, on behalf of Caledonian Sleeper and Transport Focus. The full report of findings, also produced by Quadrangle, is also available on Transport Focus's website.

The objectives of the research were to:

- build on current consumer understanding of existing and prospective passengers to help better meet their needs; and
- develop an appropriate passenger survey to measure customer satisfaction with the most relevant benchmarking parameters

To answer these objectives Quadrangle undertook a combination of qualitative methodologies:

- 30 in-situ intercept interviews: to capture in-the-moment reactions across the different journey points on the Caledonian Sleeper
- four focus groups: to obtain considered, deeper dialogue to get under the skin of specific issues, conducted with current users (three groups) and prospective users (one group)
- 14 mobile app users: in-the-moment customer generated content on the Caledonian Sleeper via an app to capture real-time behaviour and emotions, accompanied by follow-up telephone-depth interviews.

The research was conducted in London, Inverness, and Edinburgh, and on both the Lowlander and the Highlander routes. Across the research, we spoke to a mix of passenger types including: heavy, light, and prospective users; business and leisure travellers; first and standard class ticket holders; different travelling party sizes (including those travelling with children and those with disabilities); and seated passengers (in-situ intercepts only).

Key findings

The decision-making process

For most travelling between London and Scotland, the Caledonian Sleeper competes with day-trains and flying. There are several considerations that influence the decision to use one mode of transport over another.

The travellers' **scheduling requirements** are a major consideration, with specific scenarios making the Caledonian Sleeper a more attractive option. Needing to arrive early in the morning, and/or needing to stay late on the day of travel, plays to the Caledonian Sleeper's advantage, while only having an early afternoon engagement at your destination makes flying or the day-train more appealing.

The **opportunity cost** of travelling is a further consideration. This is particularly subjective: the same reason might make some people positively disposed to use one mode of transport, while making others negatively disposed. For example, the time benefit of flying is divisive: for some it is perceived to be the quickest means of travelling, particularly to/from Northern Scotland, while for others the (in)accessibility of airports, combined with the time to pass through them, negate any time benefits.

For the Caledonian Sleeper, the opportunity cost mostly relates to the perceived benefits or disadvantages of travelling overnight. For some, an overnight journey reduces the amount of time 'wasted' by travelling, while others (particularly those travelling for business) do not want to travel on their own time.

Finally, **cost** is a major consideration, but is rarely the lead factor, and is factored in when more than one suitable travel option is available. When comparing options, travellers typically factor in all the associated costs (hotel, parking, taxis, hold luggage etc.) into their decision, however this is often based on perceived, rather than actual, costs. Caledonian Sleeper can be perceived to be relatively expensive in comparison to the other travelling options, with fewer opportunities to find good deals. For inexperienced or novice travellers who are looking for an experience, cost is more of a secondary factor.

The perception of the experience of travelling on the Caledonian Sleeper is mixed among prospective travellers: for some it is a 'must try' while for others it is difficult to imagine.

Lack of knowledge about the Caledonian Sleeper (both practical and experiential factors) creates a sense of romance and mystery for some, while others draw on (negative) overnight-train experiences in Europe, and further afield, to fill in their knowledge gaps.

Experience of using the Caledonian Sleeper

There are four key components that contribute towards making a great experience: (1) feeling welcomed and looked after; (2) feeling relaxed; (3) feeling comfortable; and (4) getting a good night's sleep.

The Caledonian Sleeper delivers on these four aspects, but there is room for greater consistency and improvement across the end-to-end customer journey (from booking to disembarking and the arrival station), in addition to an opportunity for better communication throughout.

There is opportunity for the booking process to be sleeker and more informative, to give travellers more confidence when purchasing tickets.

The Caledonian Sleeper website could be clearer and easier to navigate, as could third party websites (for example trainline.com). Inexperienced or non-regular travellers would appreciate clearer information on: boarding and disembarking times (not just departure and arrival); boarding and disembarking procedures (the room, storing luggage on board, showering facilities at stations etc.); information on accommodation types (top/bottom bunk, differences between first and standard class); and use of and service style in the Lounge Car.

The departure station and boarding process is currently a weak link in the customer experience.

Better (and more) information and signposting is required by travellers for example earlier listing of the estimated boarding time on departure boards, SMS information and location/opening times of lounge (for first class passengers). A more experiential welcome is also desired i.e. making the physical boarding area more attractive with clearer branding and signposting.

The onboard experience is variable, with the Lounge Car viewed very positively, but the room perceived to be somewhat basic. Quality of sleep and of the food provided is also perceived to be variable. Unsurprisingly with the old rolling stock, the Caledonian Sleeper is felt to be somewhat tired and dated, although this can be part of its charm for some.

The Lounge Car is perceived as a welcoming and comfortable place, with the hosts praised for their hospitality. However, the size of the rooms and beds are a let-down for some, with some concerns about security (ability to lock and re-open the door).

On the whole, the food offer is viewed positively, and perceived to have improved recently, but availability appears to be an issue for more frequent travellers. Breakfast is felt to lag behind in terms of quality.

Quality of sleep is a key influencing factor for repeat usage, but is a fairly subjective measure, with inconsistencies due to the differing perceived smoothness of, and shunting in, journeys. Noise outside the train (tracks, engines, brakes) as well as inside the train (other guests and staff) all impact on the quality of sleep.

Disembarking and the destination station is currently a non-event, and a 'formal' goodbye would be appreciated to complete the experience.

Lack of clarity around disembarking procedures leads inexperienced travellers to be anxious about when they need to disembark, and this creates a somewhat disappointing end to the experience.

Other aspects of the Caledonian Sleeper experience

There is an opportunity for more and better communication prior to and throughout the journey.

Knowledge about the practicalities of travelling on the Sleeper service is key to enjoying the experience and not feeling anxious, and a better ability to communicate ad-hoc information for example delays would be appreciated.

Regular and heavy users want to feel like valued customers.

Greater recognition is desired, particularly in the booking process and from hosts. A reward scheme has varied interest, but travellers welcomed the idea of offers and promotions for frequent usage.

Benchmarking the experience

The unique status of the Caledonian Sleeper in the UK, and variation in experience and expectations make benchmarking satisfaction with the service a challenge.

In terms of comparable experiences, the Caledonian Sleepers is perceived to come closest to travelling on a ferry and other European overnight services. However, the variety in traveller type (e.g. business/leisure, frequent/infrequent usage) and differences in experience (particularly between the Lowlander/Highlander routes) mean points of comparison are often very diverse.