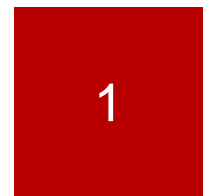


Caledonian Sleeper

September 2017

Prepared for Transport Focus

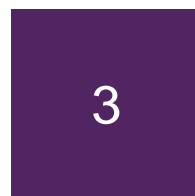
Presentation structure



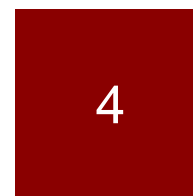
Background and executive summary



Traveller profile



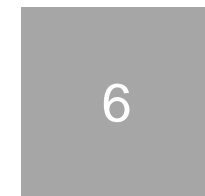
The decision process for travelling to and from Scotland



Experience of using the Caledonian Sleeper



Looking forward



Appendix

Background and executive summary

1

Project context

Improving and monitoring the travelling and guest experience in light of the next generation of rolling stock planned for 2018

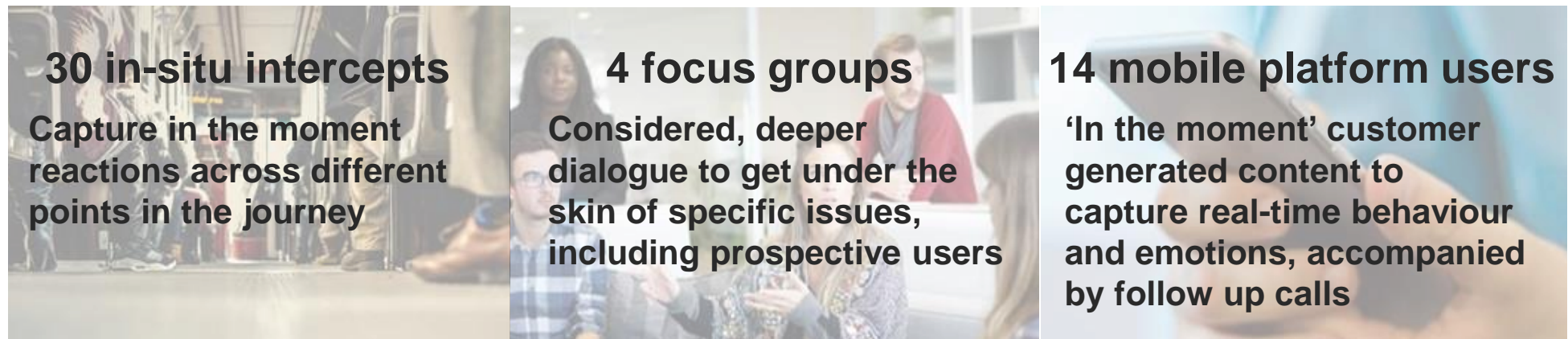
This project aims to build on current consumer understanding of existing and prospective passengers to help better meet their needs and develop a more appropriate survey to measure customer satisfaction with the most relevant benchmarking parameters

Specific research objectives include:

- Understanding the emotional experience of a journey on the Sleeper and how this contributes to satisfaction and the propensity for repeat usage
- The decision-making for using the Sleeper service, and deconstructing the role of 'convenience'
- Mapping the experience and highlighting the factors that contribute to and prevent a great experience, including booking
- Understanding loyalty schemes and the relevance for the Caledonian Sleeper
- Highlighting any differences by traveller type, and informing a potential segmentation.

Overview of our research approach

A combination of qualitative methodologies



The research was conducted in:

- London, Inverness and Edinburgh, and on both the Lowlander and Highlander routes

We spoke to a mix of:

- Light, heavy and prospective users; business & leisure travellers; first & standard class; range of travel party size, including those travelling with children or disabilities.

Executive Summary/Overview

Caledonian Sleeper is a unique travelling experience in the UK

Usage is driven by both practical and emotional factors for business and leisure travellers

Key to a great experience is:

- ✓ feeling welcomed and looked after; feeling relaxed and comfortable; having a good night's sleep

Caledonian Sleeper performs well on these fronts despite the old rolling stock, but there is scope for improvement and greater consistency, alongside the welcomed new rolling stock

Lack of information, and inspiration for prospective travellers, are key issues currently

- More information prior to and during the journey is required to set expectations and prepare passengers
- The notion of *'the distinctive way to travel to/from Scotland, and wake up in beautiful Scotland/vibrant London'* is the emotional hook.

Traveller profile



A flavour of Caledonian Sleeper customers by usage and purpose of trip

Usage	Description	Purpose
Prospects	<ul style="list-style-type: none"> • Varying degrees of familiarity from unaware, mild interest through to negative perceptions • Struggle to imagine the experience with no clear reference point, unsure of the practicalities, and unconvinced about the quality of sleep 	Business & leisure users have similar expectations/requirements but differing priorities: punctuality & reliability are more important for business users & the experience more important to leisure users
Novices: used a few times	<ul style="list-style-type: none"> • Attracted by the notion of a unique experience, more than just a practical journey, but scheduling and other practicalities play a part • Have insufficient information beforehand to be entirely confident 	
Light users	<ul style="list-style-type: none"> • Still appreciate the experience and the distinctive way to travel, but scheduling practicalities play a major role • Cost and other factors can favour other options 	
Heavy users	<ul style="list-style-type: none"> • Work, relatives or dual residency demand regular or frequent travel, with the Sleeper a strong consideration for most trips largely dependent on scheduling and cost • Can be real fans of the service 	

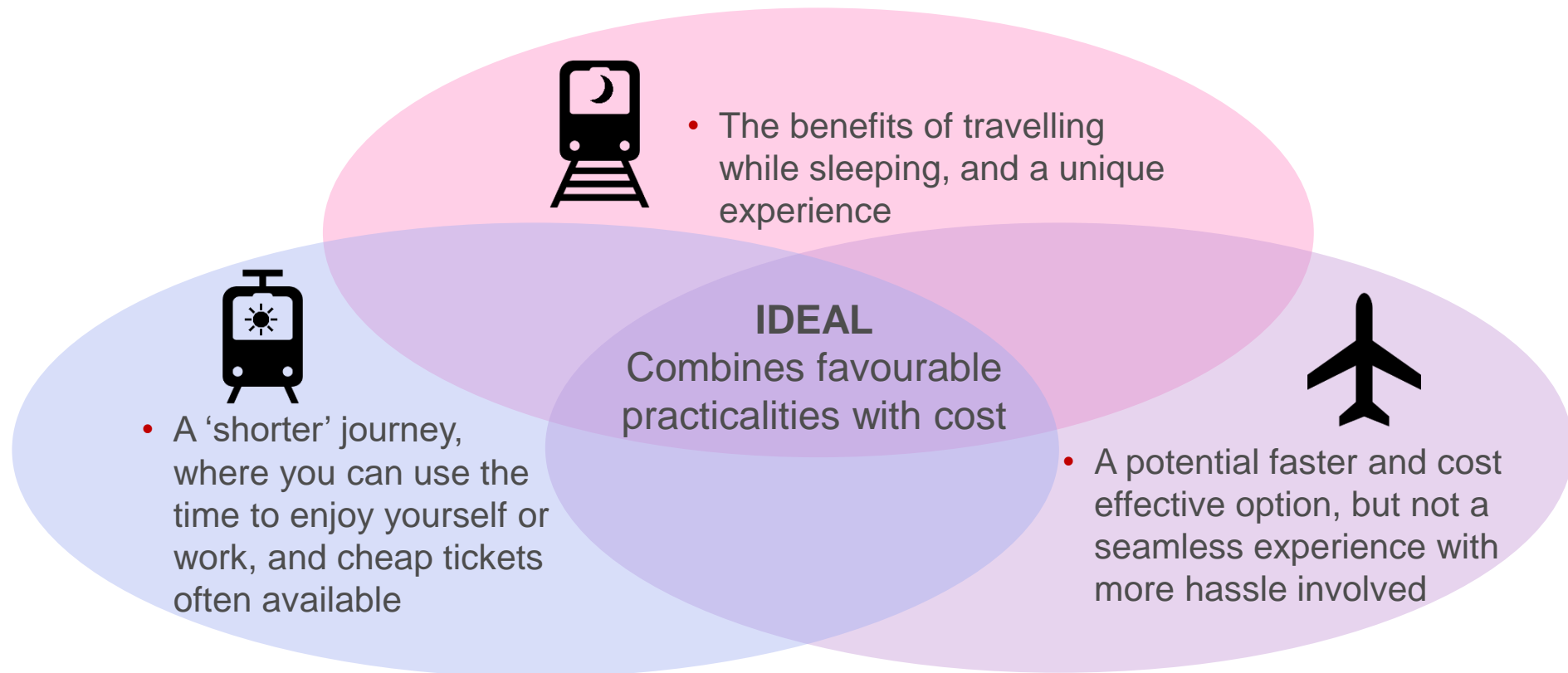
Usage and purpose are strong potential factors upon which to develop a straightforward and practical segmentation

The decision process for travelling to and from Scotland

3

Caledonian Sleeper or not: An overview

For most travelling between London and Scotland and vice versa, the Caledonian Sleeper competes with day-time trains and flying (with coach the budget/last resort option and driving only when having your car is essential)



Scheduling is a major consideration

Wanting to arrive early morning, and/or needing to stay late the day of travel, plays in favour of the Sleeper service; whereas other scheduling requirements tend to favour other options

The ideal Caledonian Sleeper scenario

Wanting or needing to be at home/work late the night before and have an early morning arrangement

"We have three full days in Edinburgh, whereas if we were travelling during the day we'd lose two days."

"I can finish my working day in London, have a relaxed evening and have some dinner, completely relaxed and get on the train."

The competitor advantage scenarios

Only have an afternoon engagement at your destination, so happy to fly and/or catch a day train both ways

"You can get back up and down in a day, if it's just for an afternoon meeting."

"I don't want to be hanging around all evening, when I could be home by midnight."

The factors that influence whether or not to fly

Besides any scheduling advantages for a particular trip, flying is potentially a faster and cost effective option, but it involves more hassle and is not a seamless experience

Reasons to favour flying

- Can be a real time saver if flying to or from Northern Scotland
- Live/work near the departure airport and destination airport is not inconvenient
- Flying and airports still have some allure for the occasional business and leisure traveller
- Children can enjoy it and be better behaved due the more enforced procedures for flying
- No need to work if on business

Reasons against Flying

- Accessibility of airport(s) combined with time to pass through them erase any time benefits, even more so with checked luggage
- Not a relaxing experience with its different components involved in getting from A to B
- Flying is not particularly comfortable
- Children become unruly because of the novelty of the experience and are difficult to control
- Can't work if required

The factors that influence whether or not to use a day train

For many where the station locations are convenient, this can be the ‘easiest’ and most comfortable option, especially to and from Southern Scotland, but scheduling means it’s rarely good when early morning arrival or late departure is required

Reasons to favour day time travel

- Can be the quickest door to door option to and from Southern Scotland
- First class travel is very comfortable
- Can walk and move around the train
- Quality ‘down time’ to enjoy or be social for leisure
- Time to work effectively for business
- Frequent service

Reasons against day time travel

- Not the most productive use of time for travelling to and from Scotland, especially northern towns
- Standard class can feel quite confined after travelling for some time

“You can do it in four and a half hours in first class for half the price [of the Sleeper].”

The factors that influence the use of the Sleeper service

The perceived benefits or disadvantages of travelling overnight and how much travellers enjoy the experience (as well as scheduling considerations), highly influence whether the Caledonian Sleeper is the travel option of choice

Reasons to favour the Sleeper

- Travelling during 'dead' time so not 'wasting' your waking hours
- The lounge car is a relaxing point of difference to other travel options
- It feels more of an experience for adults and kids
- You get a reasonable night's sleep, which is preferable to an early morning start

"I like the convenience of getting my kip and then getting up in the morning for my meeting, which is why I use the Sleeper."



Reasons against the Sleeper

- Travelling on your own time if an employee
- The dated and tired rolling stock undermine enjoyment of the experience
- The rooms are small and claustrophobic
- The overall sleeping experience and quality of sleep is poor
- It's not entirely comfortable and enjoyable experience

"It's not a perfect method of travel so I always explore various other options."

Cost is a major consideration, but is rarely the lead factor

Scheduling requirements determine the travel options taken into consideration

The decision making process

Cost is factored in should there be more than one suitable travel option

The perceived opportunity cost of the time involved is also weighed up against monetary cost

The cost of a hotel (if required) with a flight/train option and other associated costs (parking, taxis, hold baggage etc.) are taken into account should the Caledonian Sleeper be a practical alternative

For novice users who want the experience, cost is far more of a secondary factor

Cost perceptions of the Caledonian Sleeper vary

Some, even frequent users, feel the Sleeper service can be relatively expensive compared to taking a day train or flying, even if a hotel needs to be included

There is felt to be more opportunity for lower costs with flights and day trains

- Budget airlines and competition make flying, in particular to and from Lowlander destinations, relatively cheap
- Good deals on day rail tickets, especially if you have flexibility on the time of travel, are often available

In comparison, Caledonian Sleeper costs are felt to vary less

- Only frequent users are aware of advance offers
- And last minute users claim costs can be very high

When combined with a budget hotel in Scotland (far less the case for London), the Caledonian Sleeper alternative can still come out as the more expensive option

“I went from Edinburgh to Heathrow and it was £75 return.”

“It’s much, much, cheaper to get an advanced purchase ticket on a day train.”

“Sometime it can be prohibitively expensive to use the train, if you don’t have enough notice and have to buy a full whack fare, it can be crazy.”

“You can get a budget hotel for about £69 near the station [in Edinburgh].”

Four scenarios to bring this to life: flying ✈️

Each brings you a flavour of why a particular travel option is chosen, which is mainly influenced by scheduling requirements and the opportunity cost of time involved, supported by price considerations

✈️ Flying (Low or Highlander) - Leisure

'I live so close to the airport that it was a clear choice to fly on holiday – but it's also quite exciting, going to the airport! It's only a couple of hours travel and it's so easy.

We always got BA airmiles when flying so if it's a holiday it's automatic to think of flying as it adds to the excitement. There was more flexibility to when we could travel going by plane as well, with lots of times to choose from.

I flew with my children, they're ten and five, and it's a novelty aspect for them. It's still so exciting to go through the airport. They're also better behaved on a plane as the steward is there to remind them to sit down, and the seatbelt light is fantastic. On a train they'd just run around!'



"I find it quite exciting, going to the airport, and doing the whole journey."

Four scenarios to bring this to life: day train



Day Train (Lowlander) - Business

'I was travelling because of work, who organised it. Myself and a colleague went first class, so we could work together on the train, especially as there's Wi-Fi and the staff look after you at your table throughout the journey. It's more comfortable.

It was a lot less hassle than flying which has multiple parts to the journey and so if one bit is delayed then everything else is even further delayed. There is never a queue at the station really.

The meeting we had was in the early afternoon so it meant we could work in the morning on the train, have our meeting and then jump on a train back again in the early evening.'

"Getting into the city centre of Glasgow, for me, I know I've got three or four clients there. The other thing is that I can work on the train."



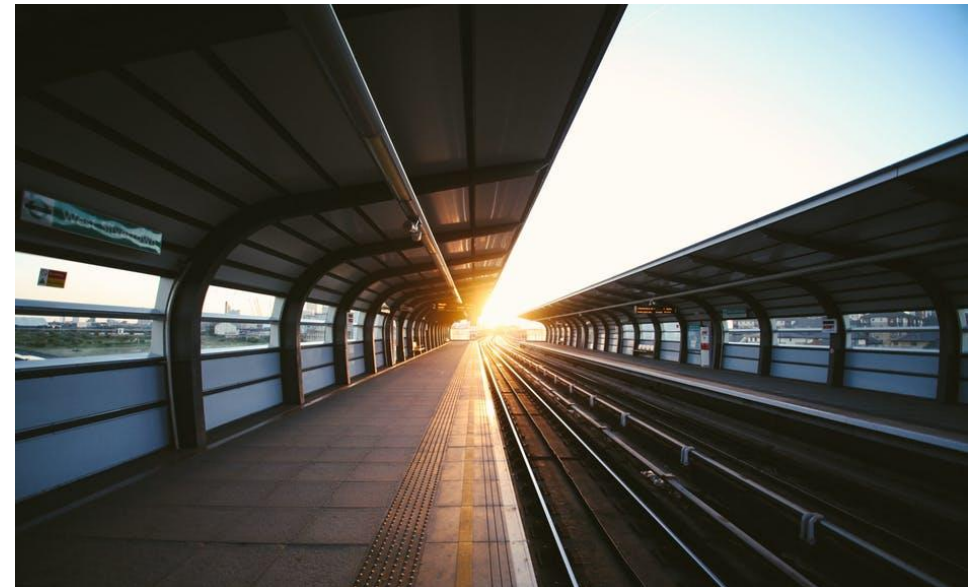
Four scenarios to bring this to life: Caledonian Sleeper



Caledonian Sleeper - Business

'I had a late afternoon/early evening meeting in London so got the train down in the day but I needed to get back to Edinburgh to see the children before school the next morning. This was especially urgent as my husband had to travel for his work early as well and usually this is fine but I work part time so we had to juggle things around.

Therefore getting into Edinburgh early was great as I could straight away catch a connection to my local station and be home before they went to school. I also didn't need to pay for a hotel room – which in London were hellishly expensive, even though work would've paid for it.'



"If you take the Sleeper, it's your hotel room and you're back in time to see the children before school."

Four scenarios to bring this to life: Caledonian Sleeper



Caledonian Sleeper – Leisure

'I caught it with my son purely for the novelty of the experience – to experience something out of a film – bucket list type experience! Overnight all the way to Inverness!

It also gave us more time in the highlands. We were only going up for a couple of days so the extra time to explore was great.

It was weird to get undressed on a train, but that was all part of the experience. The rooms are smaller than you'd think but the newness of waking up in Scotland and seeing the magnificent scenery from the windows was fantastic.

It meant that the travelling was more useful in that at least you're moving unlike a hotel.'

"We got to gain extra time in this lovely place."



"Fall asleep in one capital and wake up in another."

Ticket Choice amongst Caledonian Sleeper users

Users can have clear preferences for class of travel, but less frequent users can be unclear about the differences between standard and first class accommodation

First Class

- Desire not to share for business and leisure users travelling on their own
- But can be unclear of any other benefit

Standard Class

- Typically leisure users, travelling with others
- But can be the more budget conscious, despite wariness of sharing a room with a stranger

“All I want to know is can I lock the door when I go to change into my pyjamas or do I need to leave the door open waiting for someone to appear.”

Seats

- The budget option, or last resort when rooms are all booked
- Not all seated passengers realise they have only booked a seat

The Sleeper is a 'must try' experience for some and a 'difficult to imagine' experience for others

A 'must try' experience

- Novel and very different way to travel
- Air of mystery/romance

"There's a bit of romance, the Orient Express that sort of feel to it. It's an experience as opposed to a train journey."



"It's the sort of thing you see in a film, but you don't normally experience."

A 'difficult to imagine' experience

- Unclear expectations and some have less than desirable points of reference

"At the risk of sounding stupid, bearing in mind how long the journey is, how do they drag it out to overnight."



"I think the thought of sharing a cabin with someone and sleeping in bunk beds with them, is like some kind of youth hostel on tracks. It's a bit weird, isn't it?"

The Sleeper is a ‘must try’ experience for some and a ‘difficult to imagine experience for others

A ‘must try’ experience

A unique way to travel within the UK, that merits doing at least once, just to say you’ve done it

The lack of knowledge about the Sleeper can add to its appeal as a potential travel option (ahead of actually travelling)

The idea of waking up in a different country, while on a train, has allure, especially for leisure travellers visiting Scotland

A difficult to imagine experience

Vague reference points or associations of standard sleeper services in Vietnam and Thailand etc and in Europe are more top of mind and a reference point than more luxurious services

Unsure how the sleeping facilities work, and imagine it being cramped, uncomfortable and far from pleasant

Some business travellers can’t imagine travelling mainly on your own time, and without the reward of a nice hotel and meal should you travel the night before

It's a heart as well as a head decision to use the Sleeper

Scheduling requirements, the **subjective** evaluation of amount and quality of time, combined with cost determine the preferred travel option and individual travel preferences; and Caledonian Sleeper rarely wins for both outbound and return



- Where I need to be, and when – both before and after my journey



- Opportunity cost of the time involved end to end, including quality of time and sleep



- The full cost of the travel option



“It all depends on where I need to be and when.”

“It depends what priorities I have. Ten hours of your life overnight is less invasive.”

“Of course costs come into it, it can be prohibitively expensive to use the trains, but flying from Aberdeen isn't particularly cheap.”

Perceived ‘convenience’ is a subjective combination of the first two factors, and with different individual and trip specific priorities and costs factored in, most use a combination of travel options

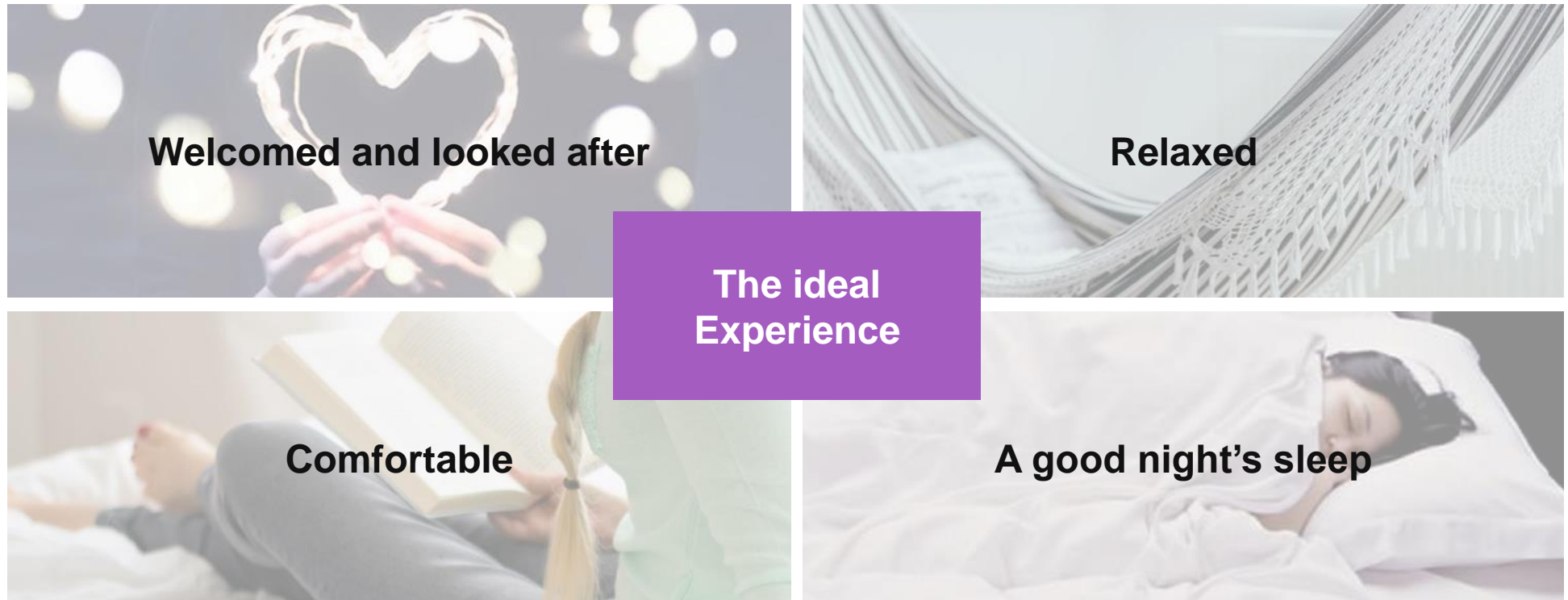
Experience of using the Caledonian Sleeper

4

Experiencing the Caledonian Sleeper

Overall there are 4 key components for a great (or indeed poor) experience, and little touches that enhance any of these and make the experience more distinctive are desirable

“If you got a welcome letter, in your cabin, that would go a long way to making it more like a hotel.”



These experiential factors are important to all

Different types of travellers have slightly different priorities

For leisure travellers in the rooms, but also some business travellers the overall experience drives satisfaction, and propensity for repeat usage

- The journey duration and scheduling allows the Highlander service more scope to deliver the experience

However, punctuality and reliability are hygiene factors, especially for business travellers

- But few are inconvenienced by arriving half an hour, even an hour behind schedule

Users are clearly more than passengers, but many currently feel the service doesn't quite merit them being called guests

- While travelling guests might be less jarring at present, guests is consistent with hospitality, which is more inspiring and may encourage users to think of the service as more of an experience

"We really loved our experience of the Caledonian Sleeper."

First time leisure user travelling with children

"It's a nice way to travel. I've done it once before and I really enjoyed it, there's the novelty factor and you combine travel with accommodation."

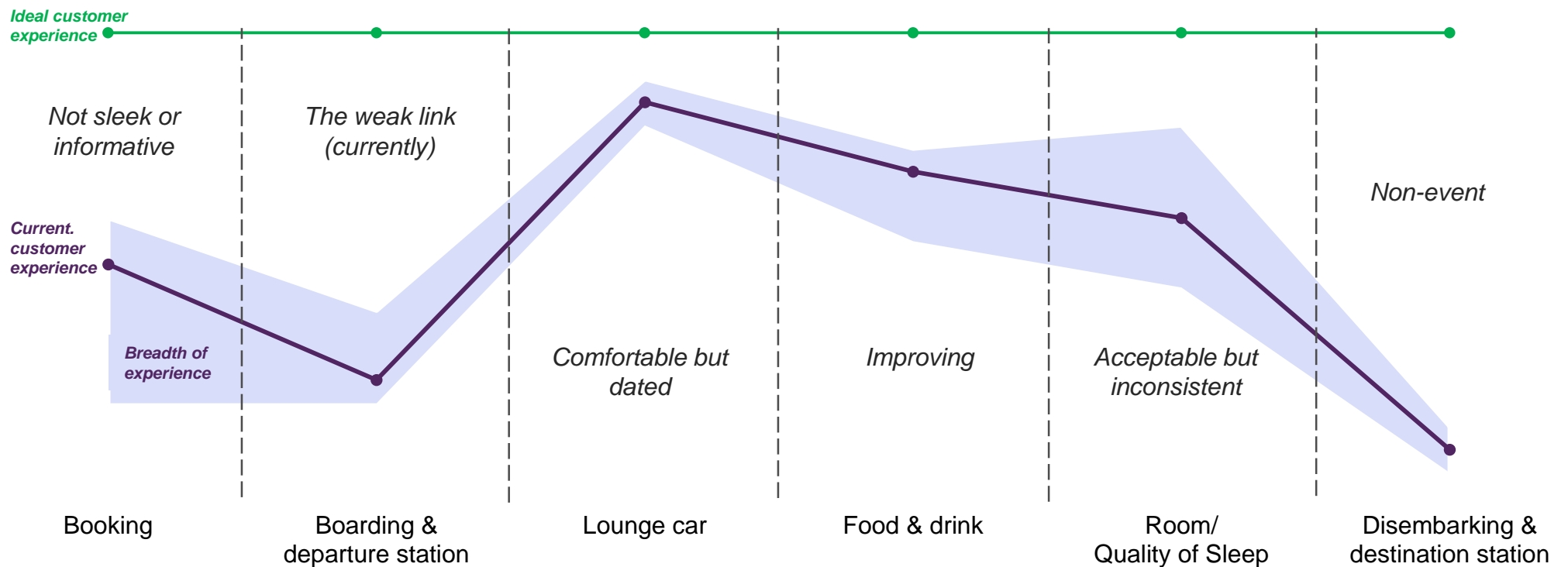
"I don't rely on it arriving bang on time. I don't schedule anything before 8.15. So if the train is a little late it doesn't break my heart."

"It sounds like they're looking after you, if you're a 'guest', you're more of a traveller, because it's more of a journey."

Caledonian Sleeper does deliver on these four aspects...

...but there is room for greater consistency and improvement, as well as better communication throughout

The Customer Journey

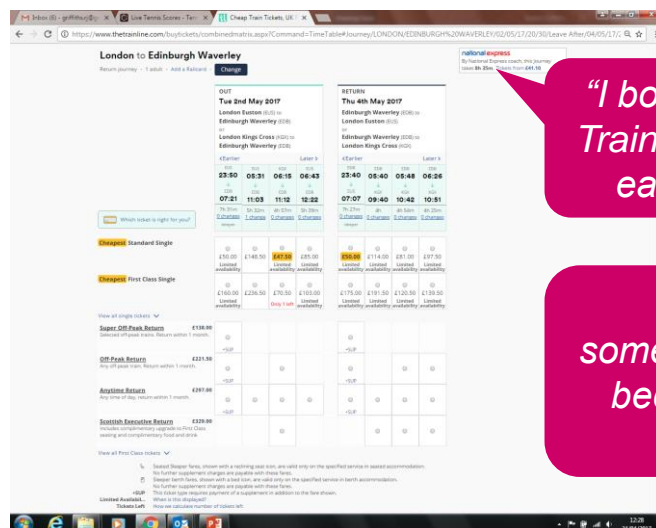


The booking process

It could be sleeker, more informative, and the Caledonian Sleeper website easier to navigate, but regular users become accustomed to using it

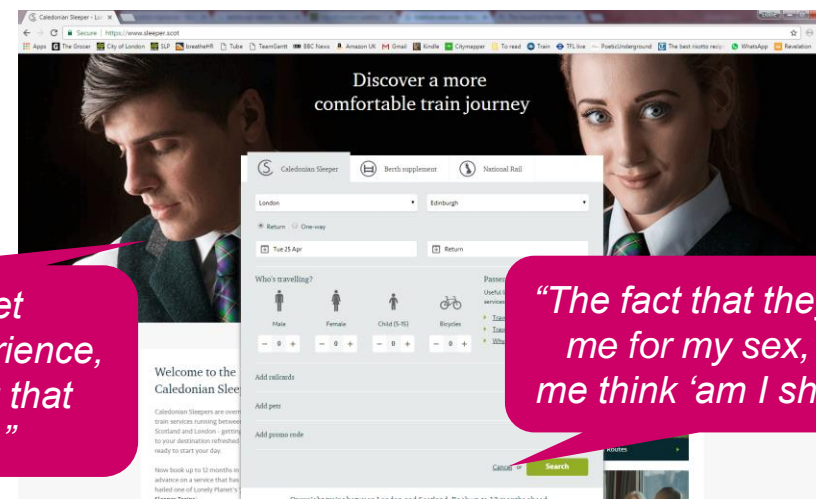
Inexperienced users, in particular, need more information about the experience and practicalities to **travel with confidence**

- some suggest such information should be printed with the ticket/confirmation



"I booked it on the Trainline app as it's easier to use."

"I went online to get someone's else's experience, because there wasn't that much information."



"The fact that they asked me for my sex, made me think 'am I sharing?'"

The booking process (2)

Those booking on other websites (Trainline/international) also have insufficient information to book with confidence

The information users want:

- Boarding and disembarking, not just departure and arrival, times
- Use of and service style in the lounge car, as well as the food and drink offer
- Boarding procedures, what to expect in the room, storing luggage, and showering facilities at stations
- Information and tips on selecting accommodation types and the options available e.g. booking upper or lower berth

Users of the Caledonian Sleeper website claim they need to search hard to find the information they want, when they can find it

- One mention that you can't buy a 'PLUSBUS' ticket through the website

Regular users want the service to remember them and their preferences

Most are happy to provide contact details (including mobile numbers), but then expect you to use them appropriately:

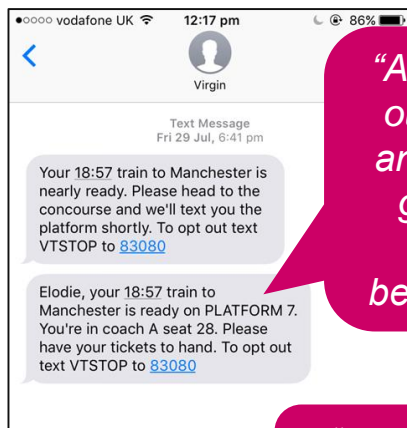
- To alert them to boarding times, delays and other relevant and useful information
- Also fairly happy to provide purpose of trip and information about travelling party

We only came across one business traveller who used a secretary/travel agency for booking, so there is no substantive feedback on this issue

Departure station and boarding

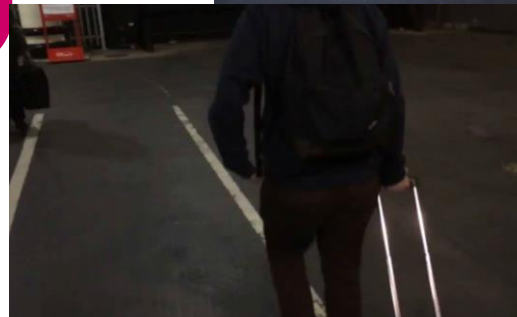
A weak link currently where better information and signposting is required, and a more experiential welcome would be an easy win

Travellers would welcome early listing and the (estimated) boarding time on the departure boards
The hosts are a key part of the boarding experience and are typically very welcoming, friendly and helpful, but there is the opportunity for them to impart further information



“At Euston they kick you out of the lounge at 11, and if you’re lucky you’ll get on the train at 11. There’s no liaison between the two teams.”

“You’re hanging around the station at a loss in the cold, waiting to board.”



“It’s not even like you’re at a station In Euston, more like some disused warehouse.”



Departure station and boarding (2)

Not being able to board earlier especially on the Lowlander can be a major frustration

Boarding information could also be SMSed to customers, alongside location and opening hours of lounge for first class ticket holders

- (Observations from this research: lounge is not well signposted in Edinburgh, and the train information notably absent from departure screens)

Unclear where to go at Edinburgh station, and all stations would benefit from more of a physical welcome

- Caledonian Sleeper branded barriers, signs, A-boards, lecterns etc. would help here as well as providing better signposting generally and where to meet hosts
- Plants and other objects could also make for a more pleasant welcome area

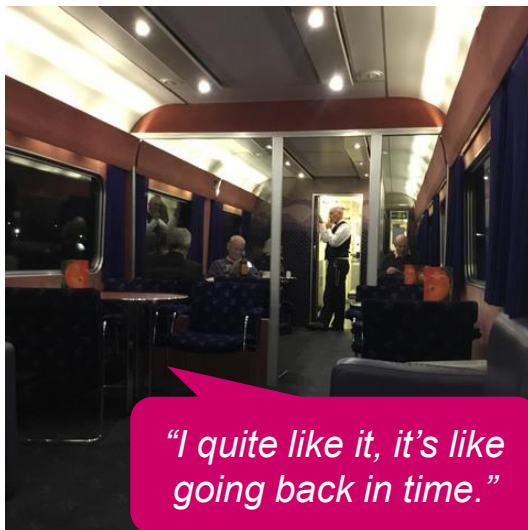
Further feedback on the hosts:

- Some claim they can be less than customer focused, not visible or inconsistent in their welcome
- They could impart new or unfamiliar information e.g. closing the doors, use of the lounge car, USB chargers tailored to the usage frequency and purpose
- A good proportion of Scottish hosts and Scottish themed uniforms also add to the experience

Lounge car

A unique component of the journey and experience, viewed very positively despite being somewhat tired and dated

The lounge car plays a key role for the Highlander Service in particular, and it's disappointing when it's full



Lounge car (2)

The lounge is a welcoming place to relax, be comfortable and enjoy oneself, and the traditional, dated feel of the lounge livery actually can add to its appeal for some

The moveable chairs and tables make for a more lounge than train carriage environment, which is liked

- Some disappointment from the drawings of the new lounge car, that this will be lost

Hosts are typically praised for their hospitality

Not an issue raised frequently, but management of the lounge during busy times can influence experiences

- Customers are disappointed if they can't use the lounge
- Perhaps, inform travellers of busy times and 'save' spaces for waiting travellers
- Allow seated passengers to use the Lounge if not busy, e.g. on Lowlander service

"If I'm getting on with three mates and we're going up to the [Edinburgh] festival, we don't particularly want to sleep for seven hours. We want to sit in the lounge car and enjoy ourselves."

Food and beverages

Regular users feel the lounge car offer has improved recently, but the breakfast has not kept up with expectations

The food and drinks offer, in particular the range of whiskies, receive positive comments, but they are not without criticism

“We enjoyed the wide selection of malt whiskies and thought that the presentation of miniatures bottles was a quirky touch.”



“Now with Virgin East Coast, I think catering has come on in leaps and bounds. Maybe the Sleeper hasn’t kept up.”



“The venison salad was very nice, and some very, very nice spiced parsnip soup.”

“You would think, if you’re paying quite a nice price, they could actually not have instant coffee.”



“It’s like an airplane breakfast from a few years ago.”



“Breakfast is still rubbish.”



Food and beverages (2)

Users welcome what they consider to be the reasonable prices compared to other train services and hotels

The food offer generally receives positive comments

- Felt to have the desired Scottish influence
- Venison salad and parsnip soup praised amongst recent travellers

However, the food is not without criticism

- Some options are described as poor microwaved meals
- The breakfast is felt not to be of a sufficient quality, and there is a call for healthier options
- Availability appears to be more of an issue than quality amongst more frequent travellers

Some suggestion that a meal offer could be offered in conjunction with the station eateries for the Lowlander services

The drinks offer is largely praised

- Felt to be a fine selection of whiskies and a good selection of other beverages
- The coffee is expected to be of a better quality, and not instant where possible

Room

The current rooms are somewhat tired and cannot directly compete with all but the most basic hotel accommodation, but none the less quality touches are welcomed if not expected

The size of the rooms and the beds are a let down for some, and the facilities and the overall look and feel are felt to be tired, but the rooms are clean



"You can't secure your door from the outside, but there again compared to a flight you leave your bag at the top and you're not watching it 24/7."

"There's very little room, I was surprised how small it was."

"I have given feedback on the sheets and duvet, my three children and I experienced prickly sensations all over our bodies."

"It was a bit like being in a prison cell, but it was worth it."

"Both of you trying to move around each other with your luggage on the floor as well, it's difficult."

"The very thing you need is a toothbrush and a bit of toothpaste and they don't give you that."

"Perhaps they could give you those slippers you get in hotels, rather than socks."

Room (2)

Adjoining rooms a real benefit especially for families

Issues with the rooms include:

- Heating and lighting rarely optimal and, with the blinds, are not easy to use
- Not always aware of sink in room
- Inability to lock door causes security concerns, that would otherwise not arise

“The blinds often are either stuck down or stuck up. The taps are a bit dodgy ...the clip to hold up the sink could be broken ...you don’t have all of them in the one room, but there’s nowhere really to report those problems.”

Suggestions for improvements

- More comfortable and less irritating bedding, and safety bar for the top berth
- Proper plug sockets
- Better soundproofing
- More appropriate contents for the overnight kit e.g. toothbrush rather than shower gel, and special touches such as disposable slippers in first class

“It’s always a lottery when you turn your tap on to see whether it’s going to work or not.”

Quality of sleep

Assessing the quality of sleep is fairly subjective and there are inconsistencies due to the differing perceived smoothness of, and shunting in, journeys

The quality of sleep is the key influencing factor for repeat usage



“Sometimes you’ve got a driver that just gives it a good, hard ram.”

“He [his son] found it hard to sleep. I like the rocking motion of a train. It sent me off quite well and I felt like I was floating which was quite interesting.”

“You’re fast asleep and it’s a lovely experience, and then you get literally, rudely jolted awake; it’s horrible, it’s jarring.”

“It might be worth saying to newbies, ‘about half past midnight the train basically reverses so they’ll be a bit of shunting. Light sleepers are going to get woken at that point.’”



More experienced travellers have carriage position preferences to help ensure a good night’s sleep

Noise outside the room, potentially from staff members, can impact on quality of sleep

Seats (based on a few on board interviews)

With low expectations the seats are felt to be comfortable and offer value for money for the budget traveller

The seats are spacious and comfortable, and better than standard class day trains and flying

“Price was the main thing, and also I’m one of those people that can sleep anywhere.”

However, the provision of food and drink is somewhat poor

“It’s pretty much what I expected. The majority of my experience would be in Russia, here there are fewer seats, padded and more comfortable and more legroom.”

“I don’t think we’re allowed to use the lounge car, that’s a bit of a shame. I assume if we want water or something we can get it.”

“I googled pictures of this area, but there was only one picture and seven pictures of the more expensive luxurious areas.”

Disembarking and destination station

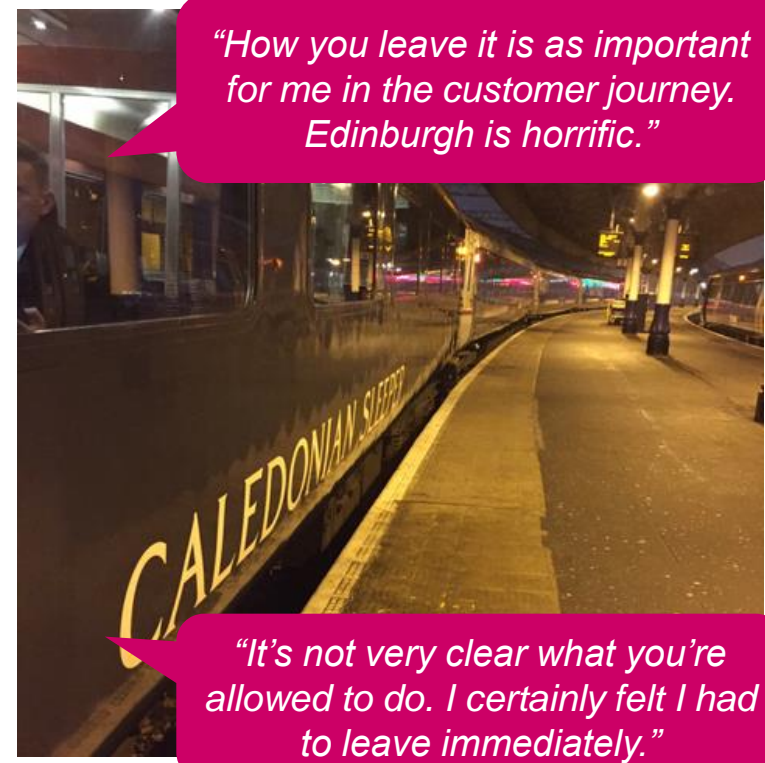
Somewhat of a non-event currently, and a 'formal' goodbye would be appreciated and complete the experience

Warm welcome but no fond farewell

Inexperienced travellers are unclear and anxious about when they need to disembark, and when they can stay onboard until

Somewhat disappointing for the 'experience' to end like any other train journey

Opportunity for staff and platform to provide more of a welcome



Communication

As a new and different experience for many, 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

Better ability to communicate ad-hoc information e.g. travel updates and problems with the rooms/seats

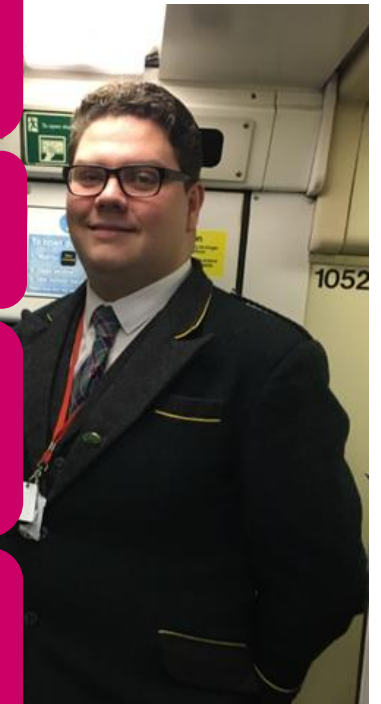
Travellers would also welcome more information about the destinations available on the train

"I know the ropes, but if you're a newcomer to the service, they don't lead you through in any sensible way."

"I would have a look on my phone to see where we were, so that was quite exciting."

"I'm a regular customer, but they don't contact me when the lounge is closed, because they don't bother to ask for my mobile."

"They should have information about Edinburgh and the other destinations in the lounge, not just security notices."



Other aspects

In terms of comparable experiences, it comes closest to travelling on a ferry and other European overnight services

A few travellers mentioned their expectations for severe delays and disruptions to the journeys:

- An automatic delay repay process is desirable, some have experienced this, others believe they still need to make a claim
- Advance warning, say by text, of scheduled and unscheduled bus replacement or severe delays, so that alternative arrangements can be made

Trust is a somewhat ambiguous concept

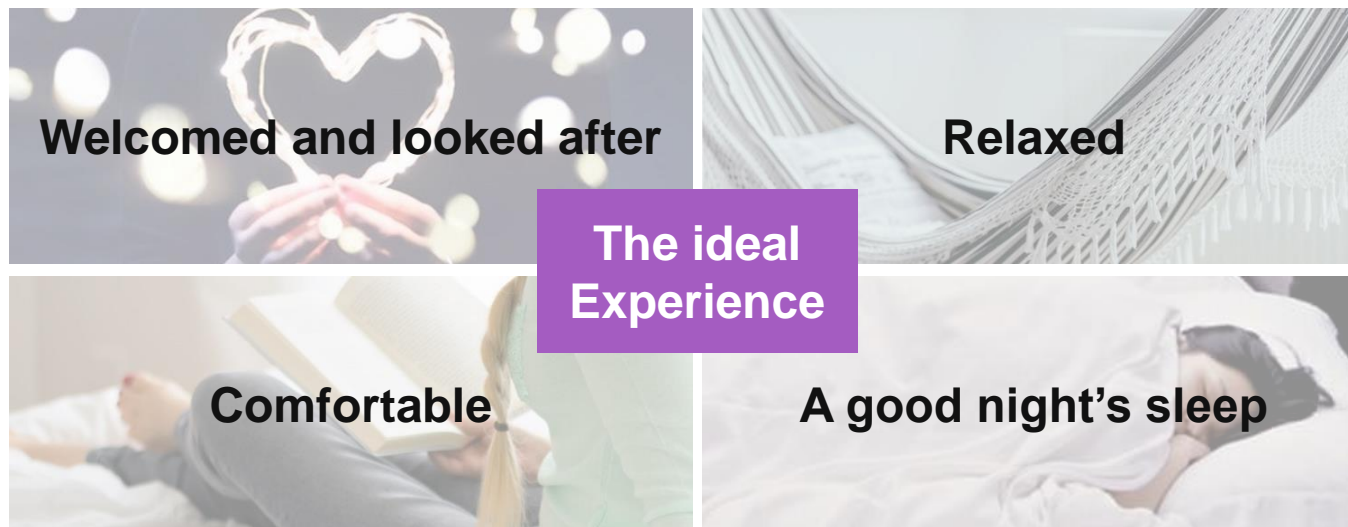
- Yes, they trust the Sleeper to get them to their destination on time, safely
- But worried about unjustified price increases due to the new rolling released

“You shouldn’t need to apply for compensation. It’s the one service where they know who’s been on board and how long the train was delayed.”

“You talk about trust, so is the price going to be different? Because if we’re going to have to pay for that [the upgrade to new rolling stock], which I think should be done anyway, so I think the contractor, the person running the franchise should do it anyway as part of the franchise.”

In summary, Caledonian Sleeper is a strong proposition

The new rolling stock will enhance the experience and further development of service, including communication, will help make for more consistent, great experiences across the four pillars of experience.



"I always find the idea of using the Sleeper is better than the actual experience mainly as a result of the poor, disturbed sleep quality as a result of the somewhat uncomfortable beds, heat in the berths and track noise."

"I don't know that I would do the Sleeper again, because I didn't get a good night's sleep."

Hosts play an essential role in helping to deliver a memorable and enjoyable experience for leisure and business travellers, regardless of frequency of usage, but a good night's sleep and the comfort of the room are critical to whether travellers will use the service again, with cost a supporting factor

Looking forward

5

Attracting prospective customers

The challenge for converting prospective travellers is providing them with the appropriate balance of inspiration and information

It is a head and heart decision  & 

Communication and marketing needs to recognise this

- Even more for business travellers travelling on their own time

“I feel like it’s an experience. It’s a different mode of transport and that’s part of the attraction, because it’s unusual to sleep on a train.”

Three key requirements:

1. Raise awareness
2. Capture the appropriate sentiment for the experience
3. Communicate the key practical information to set appropriate expectations



The distinctive way to travel to/from Scotland, and wake up in beautiful Scotland/vibrant London is the emotional hook

Recognition and loyalty

Regular and heavy users want to feel valued but a formal loyalty scheme is only a small part of this, if at all

Make me feel a valued customer

Regular and heavy users spontaneously call for more recognition

A reward for loyalty is a small part of this recognition

However, are there sufficient numbers of heavy users to make the rewards from a points based scheme practical and attractive?

"I would like that the website remembers my booking preference, because every time I ask for not near the toilet, or not near the wheels for the night, but you have to ask that to get it."

"Even if it was something like maybe a partner could travel with you as well, so if you were going down to work, somebody could come with you and have a weekend in London or something, that would be interesting."

"I think there are so many loyalty schemes that it would need to be a scheme that already exists."

"I don't feel valued as a customer. It's actuality not that cheap, and with first class on Virgin East Coast there's food and drink included in the fare."



Quadrangle Research Group
The Butlers Wharf Building
36 Shad Thames
London SE1 2YE
+44 (0)20 7357 9919
www.quadrangle.com

Research and data
Analogue and digital
Customers and money