Passenger Confidence

Contents

Executive summary

# How do service brands become 'best in class'?

- Brands that are considered best in class build affiliation by not only delivering against rational expectations but also by engaging with consumers at an emotional level

- The more tangible characteristics typically include:
  - A good product that offers good value for money
  - Delivering consistency and predictability over time so consumers know what to expect, feel in control and are not disappointed
  - Effective problem resolution when mistakes happen

- The more intangible characteristics typically include:
  - Honesty and transparency
  - Visible choice so that control is felt to be in the hands of the consumer
  - Staff excellence in term of positivity, helpfulness and visibility
  - Going the extra mile to exceed expectations
  - Offering a tailored, personalised service to make consumers feel valued on an individual level
  - Delivering a consistent brand story across all touchpoints

This combination of rational and emotional consumer benefits is required to build a *relationship* between the consumer and the brand

How brands build affinity and trust
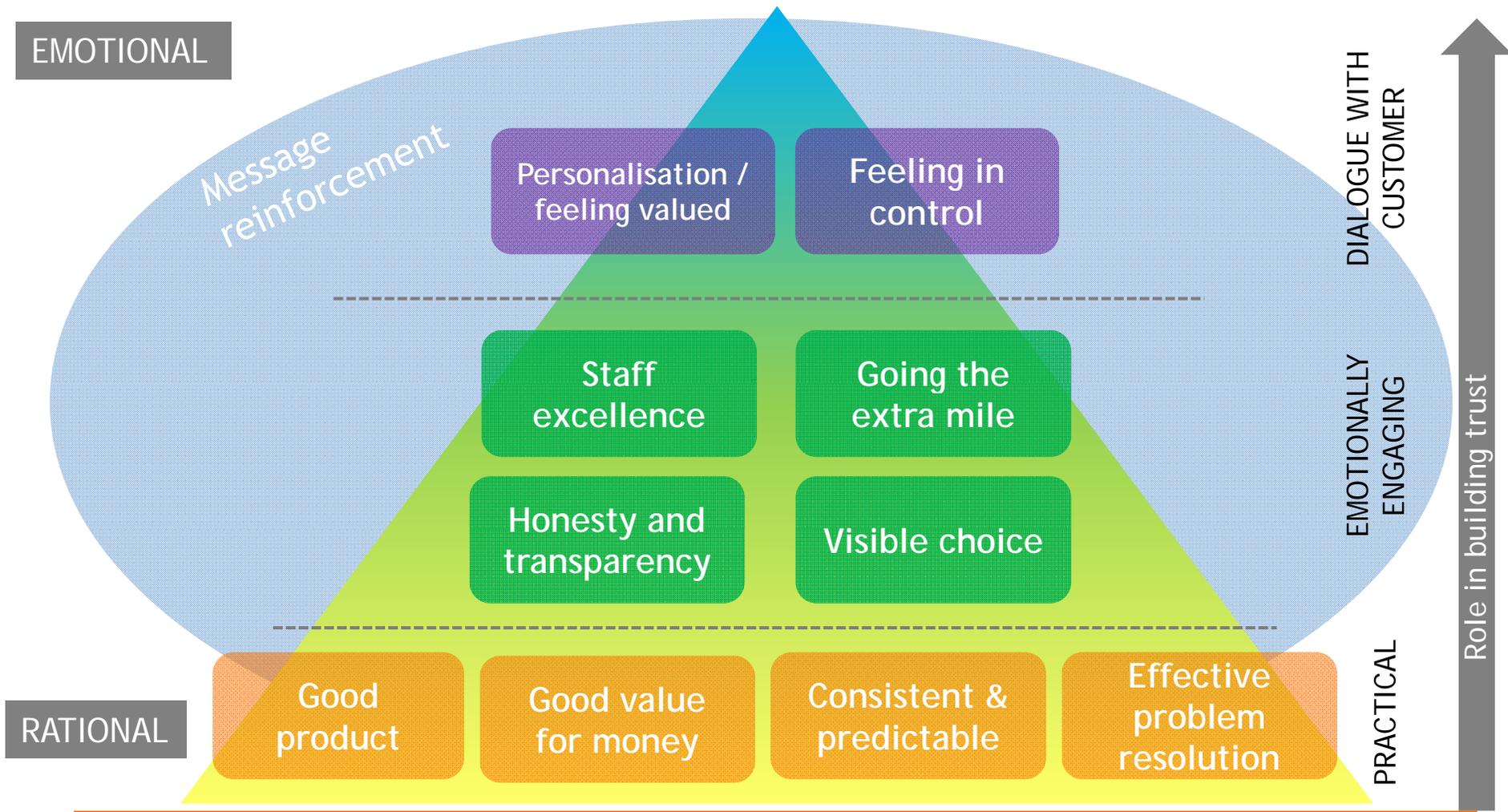
EMOTIONAL

DIALOGUE WITH CUSTOMER

Message reinforcement

Personalisation / feeling valued

Feeling in control

EMOTIONALLY ENGAGING

Staff excellence

Going the extra mile

Honesty and transparency

Visible choice

PRACTICAL

RATIONAL

Good product

Good value for money

Consistent & predictable

Effective problem resolution

Role in building trust

Affinity with service brands starts with more practical factors, however, the more emotionally engaging factors are more likely to be the ones that build trust

5

How do the railways compare?

- Consumers' interactions with the railways are often limited to the purely tangible/ experiential aspects of service

- The railways (or individual TOCs) are seldom seen as engaging with consumers at the emotional level, as building a dialogue with them, or as telling a coherent and positive brand story
  - Given this, rail users seldom see themselves as having a relationship with the railway or with individual TOCs

- That said, long-distance users have higher expectations than commuters and generally report more positive, tangible experiences. However, (with some exceptions) even the long-distance operators seem to struggle to engage consumers at the emotional level

- In this context, the performance of the railways/individual TOCs, is usually seen as 'acceptable'- set against limited expectations - but is seldom seen as exceptional

- Furthermore many rail users harbour a degree of residual negativity as a result of particular 'miserable' moments; the lack of countervailing positive relationship elements means that service shortfalls are not quickly forgiven or forgotten

- This lack of a relationship with the railways or individual TOCs, critically limits the ability of the industry to build confidence and trust

The NRPS does not address relationships

NRPS focuses on an individual journey, not the longer term relationship, if any, that passengers have with the railways or an individual TOC. Separate research may be needed to measure this important aspect of the passenger experience. Trust/confidence only makes sense in the context of a relationship

- A relationship . . . .

  - **Is extended over time**
    - run of the mill episodes remembered for 6 months - 1 year
    - exceptional episodes may be remembered for much longer
  - **Has a history/is defined by key episodes**
    - emotive, memorable episodes when something very good or very bad happened between those in the relationship – if bad, did the guilty party handle their mistake in the right way?
  - **Requires the provider to have, at least, an identity**
    - a name, a place where you can find them
    - and preferably a personality – a public face, personal traits, emotional associations
  - **Has a halo effect on ongoing transactions**
    - current transactions interpreted more or less charitably depending on the goodwill or ill will accumulated in the relationship
  - **Involves conversations**
    - dialogue between those in the relationship
    - gossip between parties about shared events/experiences – WOM

Background, objectives and methodology

Background

- Rail passenger satisfaction has historically been measured via the National Rail Passenger Survey (NRPS) which provides robust data used to benchmark operators and identify specific issues at an individual level. It is well respected across Government departments (DfT in particular), TOCs, Network Rail, the media, and a range of other stakeholders

- Other surveys of passengers' attitude to the railways use different methodologies and have tended to rely on recall of cumulative past experiences rather than focussing on one specific randomly selected journey

- Such surveys often report markedly lower satisfaction levels than the NRPS and can lead to negative reporting in the media. This negative impression of the railways can overwhelm the largely positive story emerging from the NRPS findings as well as cause improvements to stations, track and rolling stock to be overlooked

- Passenger Focus set out to explore and expand its understanding of 'the gap' between journey satisfaction as measured by the NRPS and the public's perception of the railways in general as reported in the media. Passenger Focus has hypothesized that this 'gap' is around confidence or trust in the railway at an overall level

Objectives

Research was required to understand the reasons for the apparent differences in perceptions of the railways and to inform the design and set up of any potential future 'passenger confidence' survey

SPECIFIC OBJECTIVES:

- Explain the relationship between individual journey experiences (i.e. covered by NRPS) and overall attitudes

- Understanding passengers' overall confidence in the railway and their take on its reputation and how these interact

- Understand what determines the level of confidence the public have in the railway at an overall level and with individual TOCs within it

- Establish differences in confidence in different TOCs

- Clarify the relationship between confidence in the railway and confidence in other organisations

- Explore the role of the media, internet buzz, and word of mouth in contributing to public perceptions of the rail industry

- Compare the experiences of different user groups and how these translate into their respective overall perception of, and confidence in, the rail industry

- Explore and evaluate options for a dedicated, quantitative 'passenger confidence' survey

Methodology and sample

A qualitative approach was adopted with focus groups and depth interviews, prior to which respondents were set a pre-task to help them to start thinking about their railway experiences in advance of the research sessions

GROUPS

	Location	Primary journey type	Demographics
1	Manchester	Commuter All journey lengths	Younger (18-39)
2	Manchester	Business/Leisure All journey lengths	Older (40+)
3	London	Commuters All journey lengths	Older (40+)
4	London	Business/Leisure All journey lengths	Younger (18-39)
5	Doncaster	Commuter Short distance	Younger (18-39)
6	Doncaster	Business/Leisure Long distance	Older (40+)
7	Glasgow	Commuter Short distance	Older (40+)
8	Glasgow	Business/Leisure Long distance	Younger (18-39)
9	Newport	Commuter Longer distance	Older (40+)
10	Newport	Business/Leisure Short distance	Younger (18-39)

DEPTHS

	Location	Primary journey type	Demographics
1	Manchester	Infrequent user	Younger (18-39)
2	Manchester	Infrequent user	Older (40+)
3	London	Infrequent user	Older (40+)
4	London	Infrequent user	Younger (18-39)
5	Doncaster	Infrequent user	Younger (18-39)
6	Glasgow	Infrequent user	Older (40+)
7	Glasgow	Infrequent user	Younger (18-39)
8	Newport	Infrequent user	Older (40+)

Research was conducted between 29th July and 5th August 2013

Additional sample criteria and definitions

- Journey type referred to the main type of journey the train is used for
- Even split of Business/Leisure users within groups
- Business/Leisure users must not use the train to commute
- Journey distance defined as
  - Commuters: shorter = less than 30 minutes, longer = 30 minutes or more
  - Business/leisure: shorter = less than 1.5 hours, longer = 1.5 hours or more
- Within commuter groups a mix of history/length commuting
  - Half to have been commuting via train for 5+ years, half to have been commuting for fewer than 5 years
- Infrequent users defined as those who have used the train in the last 24 months but who travel infrequently (less than once every couple of months)
- Spread of TOCs within each group
- Within groups
  - some to have complained to a Train Operating Company (TOC)
  - some to have used airport services
  - some users of foreign rail services across groups
- None to be active members of a rail user/pressure group
- Mixed gender
- Reflective mix of ethnicities per location

# Characterising best in class service brands

Enlighten.
Empower.

Individuals' behaviour as consumers is reflective of wider trends

Commoditisation

Shift from deference to reference
- Mistrust of big companies
- But rise of community e.g. social media

Loss of sense of belonging
- "I am a number"

Machine age
- Technology empowering
- But increases distance
- And increasing commoditisation

Offer/discount culture
- Changes the nature of purchase

Culture of deal hunting
- Car insurance, mobiles etc.

Perception of highly competitive market
- Fundamentally similar products

But there are countervailing forces...

Too little time

Too much choice

need something to trust

Too much information

Too much uncertainty
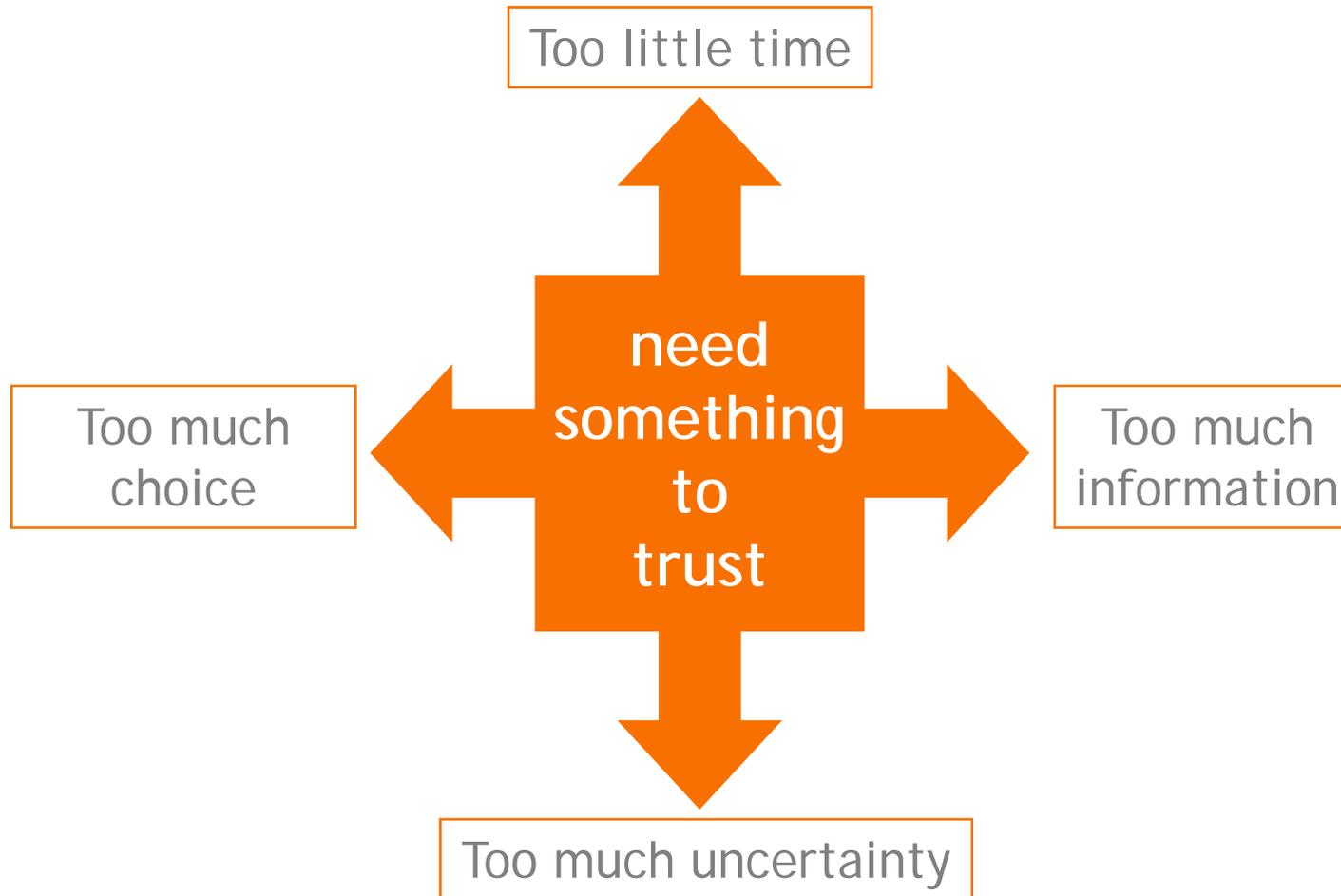
Despite what is happening with commoditisation, consumers are able to build affiliation with service brands due to the combination of tangible experiential factors and intangible warmer relationship based attributes

What characterises best in class service brands?

TANGIBLE

- *GOOD PRODUCT*
  - A strong product that is consistently being improved
  - Often a premium product, with an aspirational element

- *CONSITENCY AND PREDICTABILITY*
  - Knowing what to expect from the service, and therefore feeling in control and not being disappointed
  - A clear proposition, with the brand promise being reflected in the experience

- *GOOD VALUE FOR MONEY*
  - Not about being the cheapest but offering good value for money with regard to a premium product

- *EFFECTIVE PROBLEM RESOLUTION*
  - Immediate and hassle free
  - No quibble

What characterises best in class service brands?

INTANGIBLE

- *HONEST AND TRANSPARENCY*
  - Enabling the customer to get the best out of the service
  - Honest advice, not overselling, transparent pricing

- *VISIBLE CHOICE*
  - Control predominantly in the hands of the consumer
  - Services to suit different budgets and needs

- *STAFF EXCELLENCE*
  - Positive, friendly staff; always willing to help, welcoming so you feel confident approaching them
  - Never a shortage of someone to speak to and options to talk to a person at any time

- *GOING THE EXTRA MILE*
  - Staff doing whatever they can in their power to give the best possible service
  - Added complimentary extras that enhance experience or improve comfort
  - Making compromises

- *PERSONALISATION/FEELING VALUED*
  - A tailored, personal experience where you feel like someone cares about you as a person
  - Developing a relationship as opposed just selling
  - Doing everything possible to make the individual's experience seamless and positive

- *FEELING IN CONTROL*

- *CONSISTENT MESSAGE*
  - A clear, coherent brand story across all touchpoints

Best in class case 1: Sky

WHY BEST IN CLASS?

- **Choice and range**
  - Plethora of packages to choose from
  - Larger range of channels than any competitors
  - Can combine TV, Phone and Broadband for ease
- **Customisable and personal products**
  - Able to customise packages to fit customers' needs
  - Customers' needs and demands are a priority
  - Sky+ allows full control of the service
- **Continuous Improvement**
  - Always bringing out new channels
  - Adding programmes to existing channels

- **Caring and prompt reaction to problems**
  - Able to get problems sorted out quickly
  - Caring when they are approached with a problem
- **Offers and discounts**
  - Deals for new and existing customers
  - Free set-up and installation
  - Additional services at no extra cost e.g. Broadband
  - Actively advertise deals and offers

"They always make you feel like a valued customer, and if you do try to leave, they do everything they can to persuade you not to. They offer good deals to new and existing customers" *(Workbook – Business/Leisure, 18-39, Newport)*

"The service was great and they were helpful, but most of all, it all felt very genuine" *(Workbook – Commuter, 18-39, Doncaster)*

EXAMPLE INTERACTIONS

- I was concerned by the amount that I was paying per month so called Sky who *changed my package to one where I still received what I wanted, but at a cheaper price*

- My Sky box broke, but *within 24 hours they got a new one out to me*

Customers' needs always a priority, portrayed by choice, offers and service. Seen to be consistently striving to improve

Best in class case 2: Apple

- **Continual product improvement and innovation – always striving to be the best**
  - Products are user-friendly, trustworthy and reliable
  - Perceived as thought leaders

- **Consistently positive customer service experience across touchpoints**
  - Great company ethos, reflected in their customer service

- **Exemplary staff with a genuine knowledge of, and passion for, the products**
  - Freely available expert product advice in-store and online
  - Option to book an appointment for one-to-one advice

"The brand has stood the test of time and has stayed a leader of the pack"
(Workbook - Business/Leisure, 40+, Doncaster)

"Their products are of good quality and you know if you have an Apple product it won't let you down"
(Workbook – Commuter, 18-39, Manchester)

EXAMPLE INTERACTIONS

- Took iPhone to the store for repair, which took only 30 minutes, and on return to the store was all ready to go. The *staff were friendly and went beyond what I expected* offering tips on how to use the phone more efficiently

- Had a problem with iPhone six months into my contract. They couldn't identify the problem *so gave a brand new handset on the spot for free*

Superior product, exemplary staff and consistency across touchpoints

amazon

WHY BEST IN CLASS?

- **Convenient, quick, easy**
  - Prompt check-out and purchase process and easy returns process
  - Website and communications clear and easy to follow, universally user-friendly

- **Honest, dependable, reassuring service**
  - Value for money – can search for best price and a trusted money back guarantee
  - User reviews enable an informed decision
  - Great communication - clear timeframes, regular updates on order progress
  - Always meet expectations – e.g. deliver within the specified time frame, often earlier
  - Secure and reputable affiliated traders

- **Choice and availability**
  - Ability to shop across departments and different traders
  - Choice of delivery options

EXAMPLE INTERACTIONS

"I buy lots of stuff from them, including shoes, underwear, stationery. They are always reliable and great value for money" (Workbook - Business/Leisure, 40+, Manchester)

"The choice and range is fantastic and the returns service is hassle-free" (Workbook - Business/Leisure, 40+, Doncaster)

- Ordered some CDs but when I received them one had the wrong CD inside. *I contacted Amazon who sent a prepaid envelope for the incorrect CD, refunded the cost, and dispatched the correct one – can't ask for more than that*

- I ordered several books but some of the items I received were different to those pictured. When *I phoned to complain they were very understanding and apologetic, and offered a £5 gift voucher as well as free return and full refund*
- *Their admission of making a mistake and the efforts made to rectify it was reassuring*

Quick and easy service coupled with clear communication and reliability

Best in class case 4: Next

next

WHY BEST IN CLASS?

- **Consistent and dependable**
  - Can trust will sell reliable, good quality items
  - Always a positive experience across touchpoints

- **Easy and convenient**
  - Choice of delivery times – order by 10pm for next day delivery
  - Free and easy, no quibble returns – guilt-free shopping

- **Excellent customer service**
  - Friendly and helpful staff
  - Sufficient presence on the shop floor and always willing to help

- **Pleasurable in-store experience**
  - Stores designed with shopper in mind; well set-out and easy to navigate and clean and tidy

"Both online and in-store the customer services are excellent. Nothing is too much trouble. When you return goods, either faulty or not needed, they always credit you without question"
(Workbook – Business/Leisure, 40+, Doncaster)

EXAMPLE INTERACTIONS

- I ordered 9 rolls of wallpaper and only 1 got delivered. I called the helpline and *they arranged a delivery of a further 9 rolls for the next morning, with no questions asked*

A customer focussed, dependable organisation with a consistent experience across touchpoints

NHS

WHY BEST IN CLASS?

- **Availability, universality and dependability**
    - Peace of mind offered by 24 hour care as and when needed – always just a phone call away
    - Institutions located across the country
    - Non-exclusive life-long care for all
    - Open access, free at point of delivery

- **Trustworthy, expert treatment**
    - Expertise best in the world
    - One-to-one, personal service

- **Supportive, unrelenting personal care**
    - Friendly, hardworking, attentive staff

"I fully appreciate the service and care they have provided to my family and myself over the last 5 years… The NHS receive a lot of bad reports but very little is reported about the good they do and the progress that is made with care, and treatment that is provided"
(Workbook – Business/Leisure, 40+, Manchester)

"It's the peace of mind that at any time, this service is available for all, free of charge, unlike other countries"
(Workbook – Business/Leisure, 18-39, Newport)

EXAMPLE INTERACTIONS

- Phoned the day before appointment to check still attending. During the visit *all staff were friendly, approachable, and answered all queries courteously and thoroughly*. I was *treated like an intelligent human being* and *with respect*

- Father was in hospital. From the outset the *staff were attentive* to him and the family. Offered *regular updates* and offered family rooms to stay over. *Felt very valued, which was comforting at a time when it was most needed*

An emotionally involved service provider which, despite negative press, continues to be held in high regard

Building brand affinity and trust
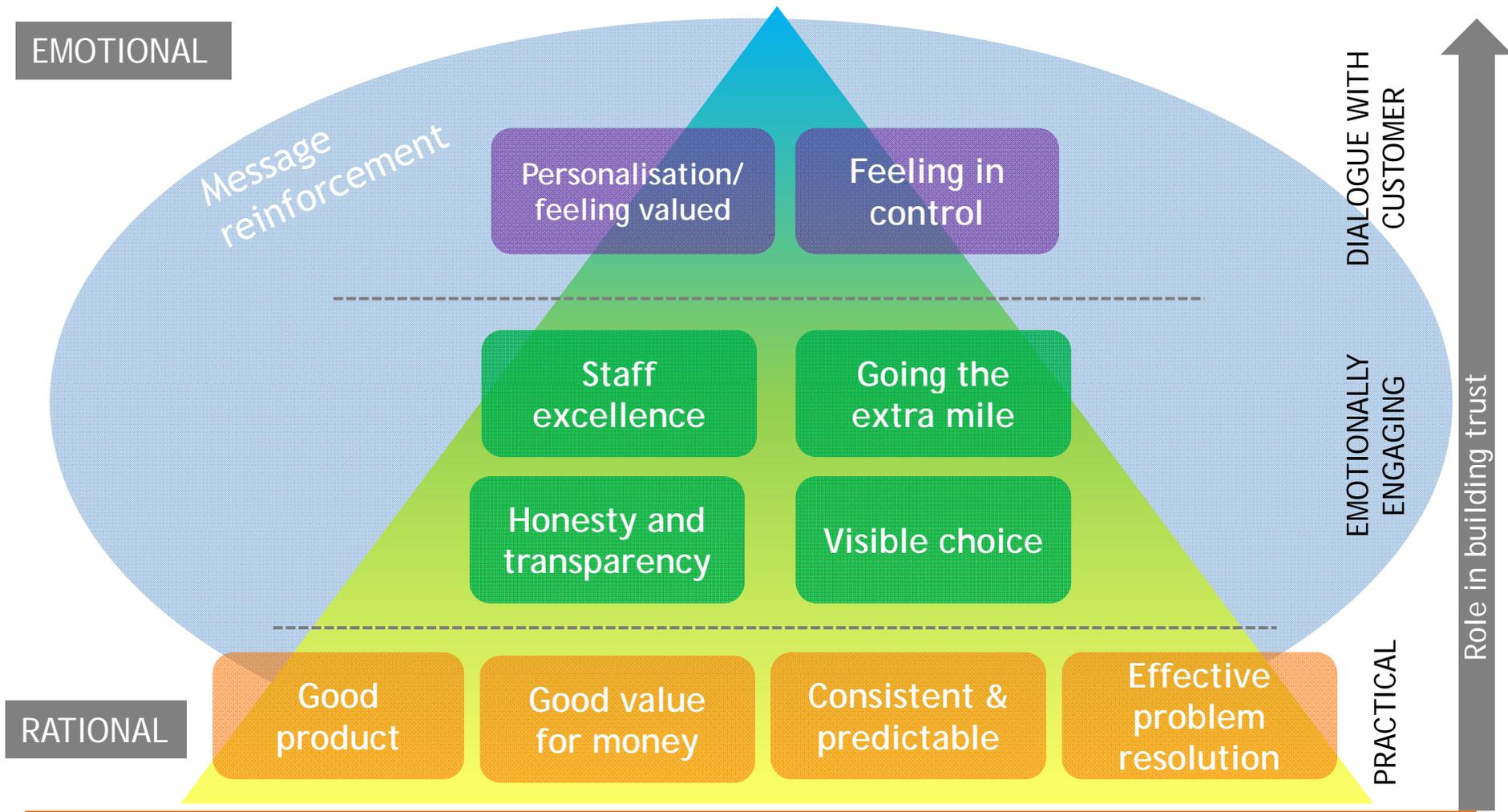
EMOTIONAL

Message reinforcement

Personalisation/ feeling valued

Feeling in control

Staff excellence

Going the extra mile

Honesty and transparency

Visible choice

RATIONAL

Good product

Good value for money

Consistent & predictable

Effective problem resolution

DIALOGUE WITH CUSTOMER

EMOTIONALLY ENGAGING

PRACTICAL

Role in building trust

Affinity with service brands starts with more practical factors, however, the more emotionally engaging factors are more likely to build trust

Illuminas

How do the railways
compare?

Enlighten.
Empower.

Key things to bear in mind

- Whilst customers talk about the 'railways' there is no such thing as one railway. Customers are aware of TOCs they use and when they talk about the 'railway' this is based on experiences and perceptions of these

- Commuters and business/leisure users are very different in terms of the frequency with which they use the train, reasons to use the train and ingoing expectations

  - Commuters have lower expectations; often expecting a fairly unpleasant experience with difficulties attached. However, they have a degree of acceptance and rationality about what can be achieved

  - Business/leisure users have higher expectations and choice. Longer distance travellers in particular, have better 'good' experiences that begin to allow TOCs to be measured against good service brands

How the railways compare? (1)

	🛒❤️	🚆
Good Product	✔ - Product/service being improved and innovated - Good quality product that can be trusted not to disappoint	✘ ❓ - Much of the rolling stock is old and needs renovating - Both rolling stock and on-board facilities are often unclean - However, acknowledgement of the investment some TOCs have made - Facilities sometimes inadequate, particularly at smaller stations
Good value for money	✔ Not necessarily the cheapest, but doesn't leave the customer feeling short-changed	✘ ❓ - Increasing rail prices above inflation - Quality of the service not in line with increases in fares - Lack of rewards scheme/offers - Variation in pre booked vs. on the day tickets
Consistency & predictability	✔ Know what to expect from the service, feel reassuring	✘ - Unpredictable service - High expectation/incidence of delays - Huge service variability across TOCs
Effective problem resolution	✔ - Hassle free with a focus on urgency - Customer always right policy	✘ - Complicated complaints process, requiring effort - Compensation not regarded as adequate - Unclear who to complain to
Honesty & transparency	✔ - Honest advice - Advice to help get the best out of service - Transparent pricing	✘ - Lacks transparency across multiple touchpoints e.g. which ticket to buy - Lack of honesty in various scenarios - e.g. information about delays and alterations often illogical, inaccurate or contradictory

How the railways compare? (2)

	❤️🛒	🚆

Visible choice	✔️ ▪ Vast choice of providers and options to switch/go elsewhere	❌ ❓ ▪ Limited choice
		   ▪ Particularly in terms of which TOC to use
		   ▪ Even when choice available it proves negative e.g. overwhelming choice of tickets to purchase, often impersonal ticket purchase

Staff Excellence	✔️ ▪ Easily accessible and respond to enquiries promptly and accurately ▪ Visible staff across touchpoints ▪ Information plentiful	❓ ▪ Limited staff available for advice ▪ Unwilling to talk to customers ▪ Limited staff apology re delays, overcrowding – sense of not caring ▪ Lack of knowledge of who is responsible for decisions, and who to complain to ▪ Individual staff members can be the exception but this lacks consistency
Going the extra mile	✔️ ▪ Doing everything, and more, to ensure the customer is happy	❌ ▪ Often not getting the basics right, let alone going above and beyond expectations
Personalisation /feeling valued	✔️ ▪ Companies look out for individuals to ensure they are happy	❌ ❓ ▪ Not treated as an individual ▪ Lack of personal nature hinders this ▪ Limited attempt to personalise the product ▪ NB varies by TOC
Feeling in control	✔️ ▪ Given choice, feel in control	❌ ▪ Control lies with rail operator
Consistent message	✔️ ▪ Consistent brand story across the customer journey ▪ Visible brand ▪ Regularly hear about the brand	❌ ▪ No communication ▪ No brand story/message (NB exception of Virgin) ▪ Confusing message about the railway ▪ Unknown entity

"I don't feel like a customer. You don't really have much interaction and you're not really provided with a decent service. If I was getting that kind of service in a shop or something, I wouldn't go back"
(Commuter, 18-39, Manchester)

"It is a case of hope for the best each day"
(Commuter, 40+, Newport)

"It's always headphones on, head down and get on, get off, and get into work as quick as you can"
(Commuter, 18-39, Manchester)

"There is a lot more disconnection with the railways. You can go somewhere and have absolutely no interaction with staff whatsoever"
(Business/Leisure, 18-39, Newport)

"The train broke down before it had even left the station and the guard just told everybody to get in the front two carriages . We kept asking "why, what's going on?" We all went there and he just shut the door and mumbled…You feel like you're just a means to an end"
(Commuter, 18-39, Manchester)

How the railways compare - commuting vs. long distance

	Commuting	Long distance
Good product	❌ ▪ Lack of facilities on board: heating, air con ▪ Cleanliness of toilets	❓ ▪ More facilities on board such as toilets and food cart ▪ Greater emphasis on comfort ✅ ▪ First class available
Good value for money	❌ ▪ Season tickets not necessarily better value for money than day tickets, or difference for shorter journeys marginal ▪ Lack of loyalty schemes ▪ Unable to use railcards for discounts on many routes during peak hours	❓ ▪ Advance tickets available online at a heavily discounted price ▪ Can use railcards to receive discounts ▪ Can take advantage of special offers
Consistency & predictability	❌ ▪ Inconsistent service ▪ delays, number of carriages on peak trains variable ▪ information on delays not communicated or consistent across channels	❓ ▪ Less frequent usage makes this more likely ▪ More consistency in type of train taken and experience on that train e.g. Virgin
Visible choice	❌ ▪ Limited other options but to take the train as road travel can be time consuming and expensive ▪ Often only one TOC operating on shorter routes, particularly in more rural areas	❓ ▪ For some longer journeys, particularly outside London, alternative modes of transport are available e.g. car, plane etc.
Staff excellence	❌ ❓ ▪ Sometimes no visible staff ▪ Staff appear unfriendly and unhelpful (local stations can be the exception)	❓ ▪ Presence of staff more visible on board trains (food cart, ticket inspectors) ▪ More likely to be kept informed on delays
Going the extra mile	❌ ▪ Staff treat customers like their main aim is to just get customers from A to B	❓ ▪ Added extras on board e.g. Wi-Fi, shop etc

What do people associate with the railways?

Values associated with the railways

Rational

Emotional

Confusing

Out of touch

Not trustworthy

Doesn't have a good reputation

Heritage

Enjoyable

Disorganised /Disjointed

Lacks transparency

Lack of staff culture

Doesn't put customers first

Doesn't value me

Self-interested

Inflexible

Uncaring

Lack confidence in

Value for Money

Not forward thinking

Distant
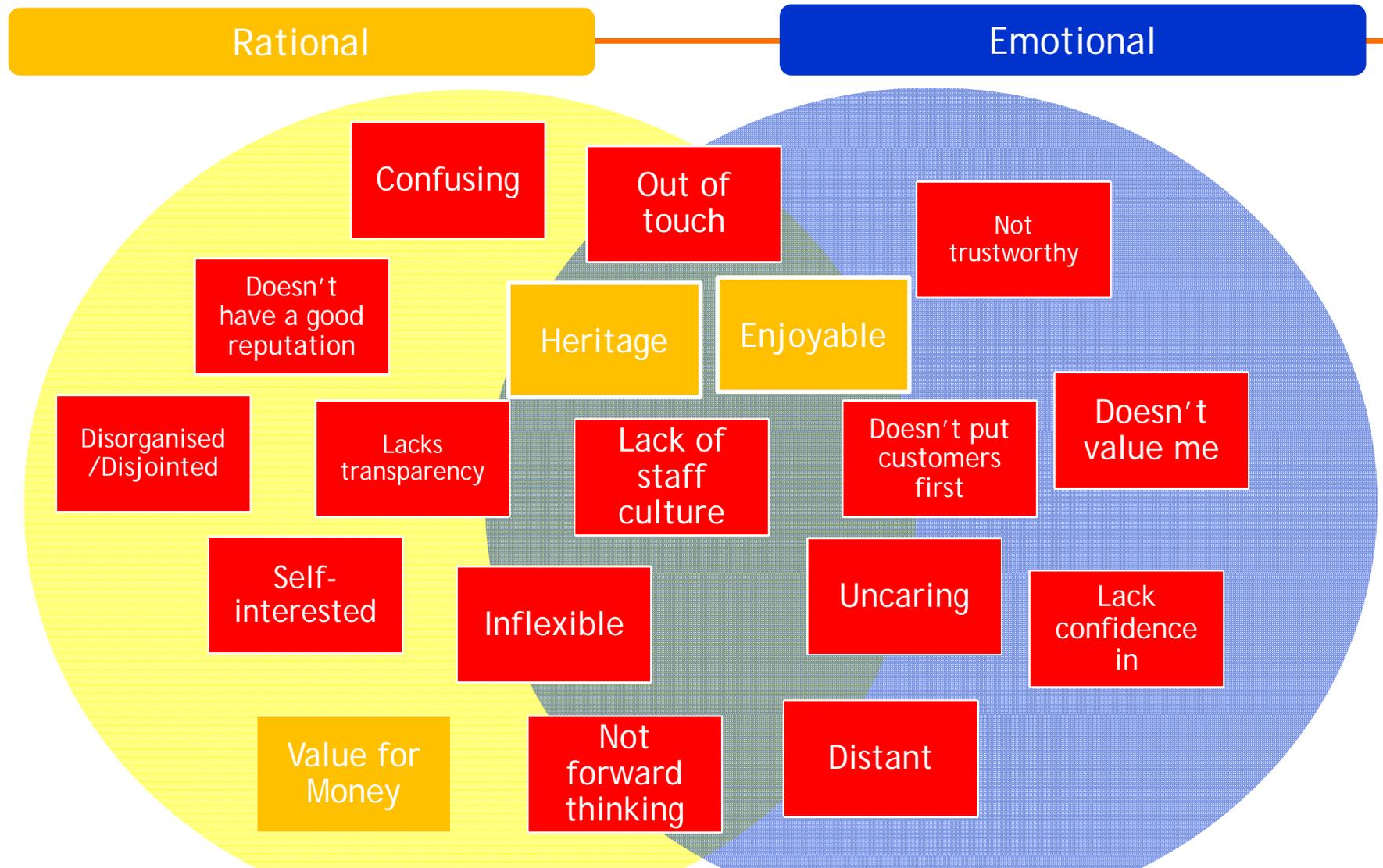
Values currently associated with the railways indicate negative associations even on a rational basis and a lack of emotional engagement

Values associated with the railways

"It's never clear what ticket you should get, when I can use it and what it will cost" (Business/Leisure, 18-39, Newport)

"You get on the train and never see any train staff for quite a while and when you do they only grunt for your ticket" (Business/Leisure, 40+, Manchester)

"If you're making the right kind of journey and have a seat and time to relax it can be enjoyable" (Business/Leisure, 18-39, London)

"When was the last time someone who works on the trains stood on a commuter train to see what it is like?" (Commuter, 40+, Glasgow)

"All you ever hear is bad things about them" (Business/Leisure, 40+, Doncaster)

"How can you trust someone that lets you down?" (Commuter, 18-39, Manchester)

Confusing

Out of touch

Not trustworthy

Doesn't have a good reputation

Heritage

Enjoyable

"It's not so much that we don't have a voice, it's just there doesn't seem to be anyone listening" (Business/Leisure, 18-39, Newport)

Disorganised / Disjointed

Lacks transparency

Lack of staff culture

Doesn't put customers first

Doesn't value me

"They just want to make more money" (Business/Leisure, 40+, Manchester)

"Over five days, you'd be very lucky to get ten journeys hassle free and on time" (Commuter, 18-39, Doncaster)

Self-interested

Inflexible

Uncaring

Lack confidence in

"Sometimes ticket inspectors can be unnecessarily strict" (Commuter, 40+, London)

Value for Money

Not forward thinking

Distant

"You get on the train and hope for the best" (Commuter, 40+, Newport)

"If you get an advanced ticket it can be value for money, if you get it on the day it isn't" (Commuter, 18-39, Doncaster)

"They know we have no choice but to use the train so they don't care about us" (Commuter, 40+, London)

"They are distant because you never hear from them" (Business/Leisure, 40+, Doncaster)

Relationship and emotional engagement with the railways

- Universal perception of being a passenger rather than customer, especially commuters
    - little if any personal exchange and service often below par
- A one-sided relationship
    - feel taken for granted and don't feel their voice is being heard
    - for commuters, feels more like a "means to an end"

- Lack of interaction both on stations and trains gives impression station staff are 'not bothered' about customer service

- Railway seen as part of the community in that passengers rely on it for transport, but feel they have no say in the way the railways are run
- Stations/TOCs in smaller towns seen as more integral to the community as alternative transport options may be unavailable

- Customers do not always travel with the same operator so find it hard to form a relationship and experiences are very contrasting across TOCs
    - also driven by limited awareness of TOC used unless a regular commuter or travelling with Virgin
- These feelings ring true across all types of user

"They know that you need it so they just make absolutely no effort. If you ask a query it always seems like it's a chore for them to answer anything and it's just always rush, get on, get off"
(Commuter, 18-39, Manchester)

"I suppose we treat them the same as our trams and things like that. So, they are part of the community but because none of us really seem to have a say in them, you can sometimes think the opposite"
(Commuter, 18-39, Manchester)

Passengers do not feel they have a relationship with the railways as a result of their experiences and interactions

"Trustworthy for me implies relationship. There isn't a relationship like you would have with a regular service provider. There's no relationship at all"
(Business/Leisure, 40+, Manchester)

Lack of a relationship = no basis for trust

What drives perceptions of the railways?

Customer journey

Purchasing tickets

Accessing platform/ waiting for train

Making complaints

Station accessibility

Departure

Problem resolution

Journey planning

On board

Arrival
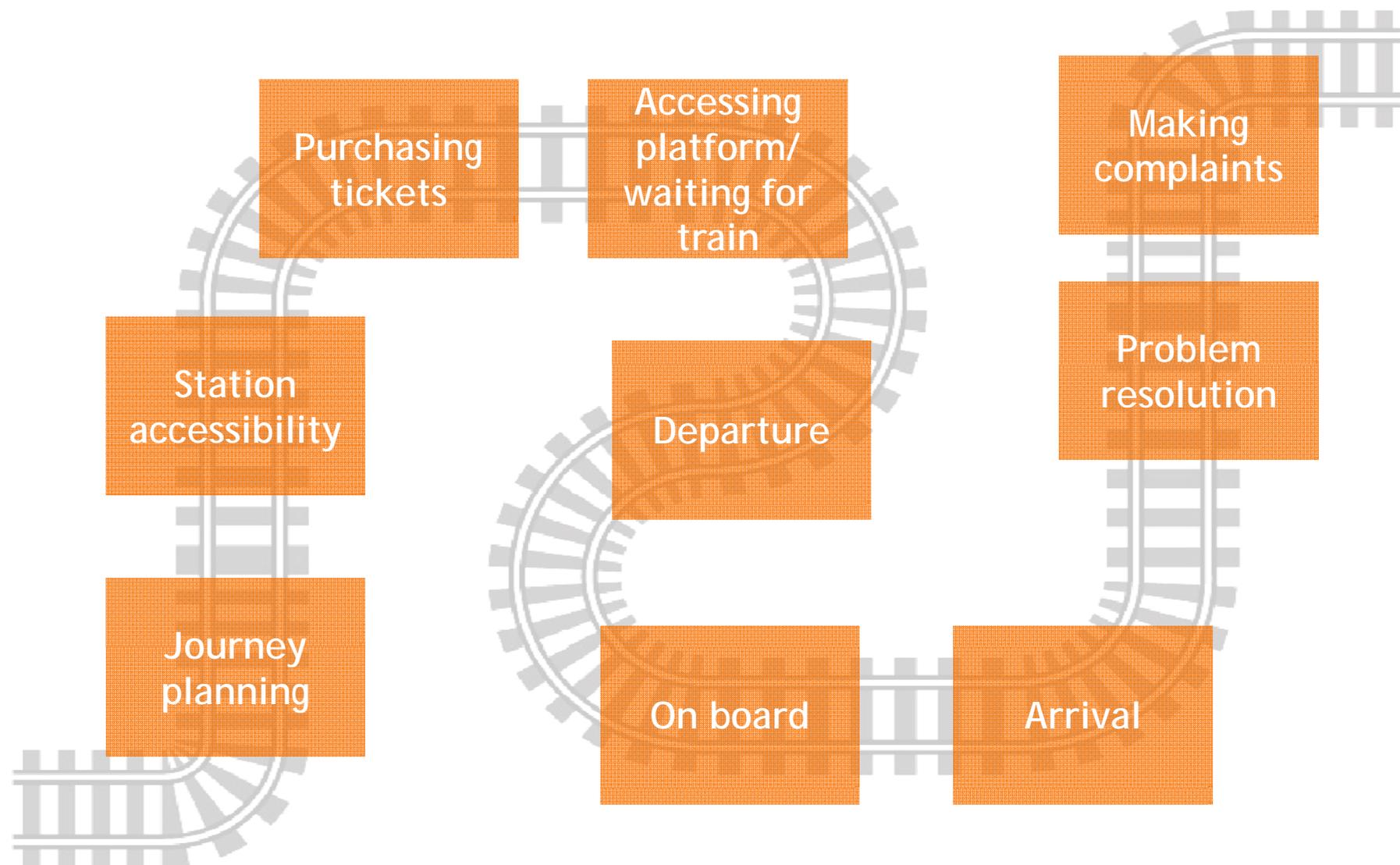
Journey planning and travelling to the station

Journey planning

- Journey planning websites have helped advanced planning ensuring deals can be secured (NB business/leisure)

- Preference to use generic websites over TOC specific ones due to the perception cheaper deals are available

  - NRES considered the most trustworthy site for planning business/ leisure journeys and buying tickets online. Some criticism of telephone system for being extensively automated and difficult to speak to someone directly

  - Red Spotted Hanky praised for its loyalty scheme – receiving points for money spent on train travel. Some desire for TOCs to adopt a similar scheme
    "Finally getting something back for the amount I spend on train travel"

- Apps (NRES) and radio used by commuters to check the 'here and now' status of trains

Station accessibility

- Car parking for commuters bears the brunt of dissatisfaction

  - Price considered extortionate and considered another way to 'rip-off' passengers
    "More expensive than the train ticket"

  - Often parking has to be purchased daily which adds to the hassle of commuting. Desire for a season ticket at a competitive price, or to include car parking in price of rail ticket including a regular user discount

  - Insufficient spaces in train station car parks
    - Business/Leisure users get caught out – arrive with time but lack of space results in panic, with some missing trains, whilst alternative parking sought
    - Commuters claiming only able to get into the car park if on the first few trains out

  - Lack of free local parking close to the station
    - Feel pushed into having to use station car park or adding other forms of transport to a journey, which adds time, cost and hassle

Purchasing tickets

Purchasing ticket

COMMUTERS

- Deciding on a season ticket or a daily ticket confuses and highlights value for money issues:
    - season tickets, particularly yearly, perceived to only offer good value for money on a longer commute or travelling 5 or more days a week – with the rise in flexi working this isn't always the case
    - concern about level of commitment with a season ticket for a month/year - if miss one or two weeks not considered value for money

- However, the convenience offered from season tickets, e.g. not buying a new ticket every day, makes it worthwhile for many

- Need to have physical tickets considered old fashioned
    - able to use paperless tickets in many other industries, why not rail?

"I should be able to go online the night before and purchase my season ticket for the week, but I have to go to the kiosk every Monday morning"
(Commuter, 40+, Newport)

BUSINESS/LEISURE

- Advance Tickets provide the opportunity to pick up a bargain and help offer good value for money but passengers have many issues:
    - fare type is confusing: advance, super advanced, off peak, super off peak etc
    - concern over purchasing the wrong fare
    - how can two singles be cheaper than a return?!
    - perception that TOCs purposely confuse so customers purchase more expensive fares
        - Virgin felt to clearly highlight the cheapest fare

- On-the-day tickets offer convenience, however various issues
    - huge price differential versus advanced bookings – not all travel is able to be pre-planned
    - if tickets are purchased on the day the preference is to buy from the counter due to assurance that the correct and best value ticket will be purchased and personal interaction liked, however, often ticket booths are unmanned or have lengthy queues

- Ability to purchase tickets on board is inconsistent
    - some operators allow it, others issue fines

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Accessing platforms and waiting for the train

Accessing platforms and waiting for the train

- Huge variance in the quality of facilities at different stations

    - Recognise and appreciate the quality of the facilities at larger and newly renovated stations e.g. Kings Cross, Manchester Piccadilly as well as some stations on the London Overground line. However, find it hard to differentiate who is responsible for this investment

    - However, this highlights poor facilities at some smaller stations which appear neglected, particularly outside of London

    - Some issues amongst Business/Leisure users with accessibility in terms of lack of lifts for buggies/wheelchairs

- Often no/few staff visible on station platforms to ask for information/directions, particularly smaller stations

- Safety concerns at smaller local stations at night due to lack of lighting and lack of staff

- Customer requirements are that most stations should have:
    - Toilets
    - Somewhere warm to wait for the train
    - Somewhere to sit down
    - Refreshments available
    - Information boards with train arrival time

"I went to Bexleyheath on the outskirts of London and it's a tiny station. But it's still got a little shop, toilets, you can get some refreshments, it's got an indoor bit with closed doors. Mossley (outskirts of Manchester) hasn't got any of that"
(Business/Leisure, 40+, Manchester)

"The amount of times when I have commuted and you go to your little station. You stand there, you're freezing cold, you're getting absolutely drenched. There's no real shelter, there's certainly nowhere to go and stand where it's warm. There's nothing to tell you how long a train is going to be"
(Business/Leisure, 40+, Manchester)

Departure

Departure

COMMUTERS

- Commuters acknowledge it is unrealistic to expect all trains to be on time and occasional delays are acceptable if the majority of journeys are prompt and reliable. However currently, the trains are largely perceived to be unreliable

BUSINESS/LEISURE

- Less tolerable of delays as often travelling to make a certain time/appointment

- The manner in which delays are handled is below acceptable standards and a key cause of grievance

  - Lack of information about cause of delay, or any estimate of when the train may arrive, is frustrating

  - Inaccurate updates keeps commuters holding on in anticipation, whereas accurate estimation would allow them to find alternative journeys if feasible

  - Information screens and tannoy information contradictory

  - Staff somewhat unhelpful and uncooperative

  - Same delay occurring on a frequent basis frustrating as belief TOCs should learn from mistakes

On board train journey (i)

Comfort and facilities

COMMUTERS

- Comfort not a key requirement for commuters, but dissatisfaction with it

  - Often have to 'squeeze' on to the train and pushed up against the side/door

  - Annoyance that paying £000's for a season ticket and not getting a seat

  - Frustration as to why TOCs don't put on more carriages during busy periods

> "If you're not driving, you're not stressed, you're sat there and you're comfortable. But if you're having to stand up, you're not relaxed and you don't arrive stress free, you're more stressed from being bundled about and people walking past you"
> (Business/Leisure, 40+, Doncaster)

> "Sometimes it's like standing on a plank of wood on wheels with a bit of plywood above you as well, nothing in-between"
> (Business/Leisure, 18-39, Newport)

- Quality of rolling stock often unacceptable
  - Old trains, dirty carriages, dirty toilets, no air con or heating on all year round

- Do not desire sophisticated facilities, simply desire a basic, clean service

BUSINESS/LEISURE

- Positives are noted but it is *variable*

- Comfort expected and predominantly experienced as travelling off-peak or on longer journeys when seats are pre booked

- Greater expectation in terms of facilities in carriages e.g. plugs, Wi-Fi etc – currently very inconsistent across TOCS

- Basic facilities often considered below par
  - Toilets, temperature etc

- Provision of shop/buffet cart enhances the experience. This also acts as a key staff interaction point and is praised. However it can be inconsistent in terms of availability and communication of the service

  - e.g. no buffet cart available but not told, card payments not accepted

On board train journey (ii)

Delays

COMMUTERS

- Frequent delays experienced during a journey are a **key cause of frustration** as makes passengers late for work. **Delays are almost considered** *'part of the experience'*

- The **frustration is heightened due to often not receiving an apology or explanation** or the explanation provided being unacceptable/not believed
  - e.g. leaves on the line, wet tracks, cold tracks

- Many of the **reasons given for delays are considered something the TOCs should be able to manage/plan for**

- Believe **staff should handle delays better**
  - e.g. providing accurate information in terms of cause of delay, likely length of hold up and impact on arrival time

BUSINESS/LEISURE

- Given less frequent usage, incidence of delays is not as great, however, **the impact can be greater**
  - depending on length of delays this can have a greater knock-on effect on what is following the journey e.g. late for meetings, day out being eaten into etc

- **Communication regarding delays also considered poor** and needs handling better by on-train staff
  - e.g. providing accurate information in terms of cause of delay, likely length of hold up and impact on arrival time

"I was thinking about calling ahead but I thought I cannot call ahead and say I'm stuck on a train, we had absolutely no idea if it was going to get me there. But if I can say the train company has given me an estimation of twenty minutes delay, I can say that I will literally only be a couple of minutes late as opposed to saying I will turn up an hour from now"
(Business/Leisure, 18-39, Newport)

On board train journey (iii)

Ticket inspectors

- The manner of ticket inspectors is hugely variable - sometimes pleasant and talkative and other times patronising and uncooperative

  - sometimes, ticket inspectors ask for the ticket and then seem uninterested and don't even look at ticket

- Inflexibility when genuine mistakes regarding tickets have been made e.g. a lost railcard

- Manner in dealing with ticketing issues often makes other passengers feel uncomfortable

First class

COMMUTERS

- Frustration that the area is rarely at capacity when rest of the train is crowded with people standing

- Whilst not against First Class travel, TOCs should reduce the space dedicated to it during specific journeys, particularly commuting hours

BUSINESS/LEISURE

- Gripes not as prominent, and First Class considered a 'nice to have'

- However, number of carriages given to First Class frustrates

- Additionally, the area is often empty and guards unwilling to upgrade for free as would happen on planes – lack of goodwill

"On the way to Manchester station my purse actually got stolen with my Rail Card in it, I still had my train ticket. I was clearly upset that I had just been mugged, and the man on the train was awful about it and he was like well you've not got your rail card. There could be exceptions for certain things, it doesn't have to be so clear cut"
(Commuter, 18-39, Doncaster)

"When I came back from Manchester, I was stood up, and I could see into first class, there was no one in there, so I said to the guy, any chance I can go in there mate, he says…………yeah, you can go in there if you want to upgrade, it's such and such a price, but it was all empty seats there, ludicrous"
(Business/Leisure, 40+, Doncaster)

Arrival

Arrival

COMMUTERS

- Prompt arrival, on a consistent basis is paramount at the expense of comfort

  - potential to make other areas of concern (e.g. standing, over crowding) become more acceptable

- However, the perception and expectation is of often late trains, and some factor this into journey planning

> "It needs to be a happy medium though because you can have the most comfortable train in the world but if it's 20 minutes late every day that's not acceptable"
> (Commuter, 40+, Newport)

> "I would prefer it was on time and if it was on time all the time, and then I wouldn't mind standing up"
> (Commuter, 40+, Newport)

BUSINESS/LEISURE

- Business users less forgiving of delays given meetings etc

  - Again, delays are factored into travel plans and the train before absolutely necessary is often taken to allow a buffer

- With leisure users prompt arrival desired but forgiven, within a threshold (e.g. 10 minutes), for comfort during a long journey

> "I would rather have you know, nice service and maybe I might be a bit late"
> (Business/Leisure, 18-39, Newport)

> "I think it depends on the journey you're taking. If it's leisure you can deal with that. I you're on business and you're on a deadline then you can't turn up at your office and say 'awfully sorry'"
> (Business/Leisure, 40+, Manchester)

Problem resolution

Problem resolution

- **Difficult to resolve problems** either on the train or at the train station

  - No-one to speak to about problems at the station

  - Staff can be uninterested

  - Lack of customer service

- **Staff are considered to lack empowerment -** they try to be helpful but do not have adequate knowledge if problems occur

- Acknowledge infrastructure that has been put in place to increase communication channels at stations e.g. intercoms to speak to station staff

- Preferred sources of information when problems occur are:

  - Phone apps (e.g. National rail enquiries) – considered most accurate and more informative (NB younger)

  - Locate a member of staff

  - Departure boards

  - Tannoy announcements

"If the train is cancelled you might as well find out more information for yourself than talk to a guard. They're not interested"
(Business/Leisure, 40+, Manchester)

Press **green button** for next train and timetable information

Emergency Assistance

Handling of complaints

COMMUTERS

- Less likely to make complaints given frequency of reasons to potentially complain
  - *"I would be writing a letter of complaint every day if I did"*

- More likely to brush off miserable moments as 'part and parcel' of train travel

- Where complaints are made it tends be linked to staff issues or extensive delays as opposed to minor delays

- Inability to make an immediate complaint is a key frustration

- Making a complaint is not straightforward
  - No transparency about how to actually make complaints
  - Confusion about where to send complaints to
    - Difficult to find a telephone number to complain through - preferred as quicker to reach someone directly and belief more likely to get an answer this way

- Handling of complaints by TOCs often seen as unsatisfactory and not worthwhile
  - Receipt of complaint often not acknowledged, even if acknowledged an outcome is rare and chasing is required
  - If complaint progresses feels overly complicated; too many questions to fill in with caveats

- Compensation often seen as not worthwhile
  - Complaints process implies TOCs unwilling to accept blame and unlikely to give compensation
  - Compensation for complaints can be seen as pitiful, often a small percentage of the original ticket value

BUSINESS/LEISURE

- Due to this type of travel being linked to specific occasions/experiences, miserable moments more likely to have a greater impact on them and more likely to complain

"If you don't complain at the station, you have to go and start emailing. If you're in a shop and you've had a bad experience, you get the manager down and you're face to face, whereas there's never really a manager, it's just somebody selling tickets" (Business/Leisure, 40+, Doncaster)

Purchasing tickets

Accessing platform/ waiting for train

Making complaints

Station accessibility

Departure

Problem resolution

Journey planning

On board

Arrival

Role of staff

Staff are seen by many as the 'face of the railway' and considered to have a direct impact on passengers perceptions of TOCs. At all stages of the customer journey staff have the opportunity to create magic or miserable moments for passengers

- Staff often the only interaction with a TOC
  - Potential to drive perceptions, however, TOCs not felt to be investing in staff in terms of training etc

- Staff can help alleviate miserable moments and make a journey more tolerable through their manner – as simple as just a smile or a good morning

- When staff are spoken about positively it is often driven by 'helpful' local train station staff
  - For commuters repeating the same journey every day, friendly staff and smiles can brighten up a journey and change a commuter's attitude for that journey/day
  - With business/leisure users, platform staff able to create magic moments through helping with prams/luggage etc

- However, negative staff experiences are frequently cited
  - Unfriendly staff at larger stations unwilling to speak to passengers
  - Inconsistency with on-board staff
  - Passengers actively avoid using staff as an information source, particularly at larger stations, due to perception unwilling to offer advice and advice inaccurate
    - commuters rely on apps/radio for information on delays as considered more trustworthy

- There is often considerable sympathy for/empathy with 'front line' staff, in contrast to more senior management who are perceived a seldom visible to the public or even supportive of their own staff

Defining magic moments

Magic moments are driven from staff interaction or outcomes from bad experiences. The most impactful of these are staff interactions and from longer distance journeys

Good experiences → **MAGIC MOMENT SCALE** → *Going above & beyond*

- *"My magic moment was to actually get a seat on the train"*
(Commuter, 40+, Newport)

- *"When I commute, getting where I am meant to on time"*
(Commuter, 18-39, Manchester)

- *"The train guard said hello to me and we had a little joke. It completely changed my mood for that day"*
(Commuter, 40+, Newport)

- *"My journey was uninterrupted, allowing me to arrive at work on time for the meetings that I had"*
(Commuter, 40+, Newport)

- *"The last train from Scotland to Euston was delayed by 30 mins which meant that I missed the last tube. Virgin agreed to pay for a taxi home and refunded me half of my train fare"*
(Business/Leisure, 18-39, Glasgow)

- *"The ticket inspector answered all of my son's questions that he asked him about the railway"*
(Commuter, 40+, Newport)

- *"There were delays on the route that I was due to take, the train guard gave me an alternative route to take that got me to my destination on time"*
(Business/Leisure, 18-39, London)

- *"I was travelling with my young daughter who was in a push chair. The member of staff escorted me all the way to the platform helping me up and down the stairs"*
(Business/Leisure, 18-39, Newport)

- *"I was travelling with young children, and as I handed over the tickets for the guard to check, she pulled out a book of shiny stickers and gave one to each of my children"*
(Infrequent user, 18-39, Newport)

- *"I bought a ticket from the counter, and along with my tickets, they gave me a Christmas card"*
(Commuter, 40+, Newport)

- *"I fell asleep and ended up in Hereford – the guard gave me a blanket and coffee as I waited for the first train back in the morning"*
(Business/Leisure, 18-39, Newport)

- *"I was dressed up for an evening out and it was pouring with rain. As I got off the train, the guard gave me his umbrella"*
(Commuter, 18-39, Doncaster)

- *"I left my luggage on the train, but luckily it had my contact details on it. I told a member of staff and he tracked the luggage down and I had it back within an hour"* (Business/Leisure, 18-39, Glasgow)

Magic moments do not always need to be based on going above and beyond expectations, often a good experience or a basic interaction with staff is enough to classify as a magic moment

Commuters' magic moments suggest they appear easily pleased, however, this is driven by low expectations...

- Commuters found it more difficult to pinpoint a specific moment that they felt was magic

- Commuter expectations are lower and consequently experiencing basic service features, such as getting a seat or departing on time, are regarded as magic moments

- With commuters, given the lower expectations and more consistent poor experience, 'magic' moment tended to be considered 'good' as opposed 'above and beyond' moments

"I don't get a seat on the train going to work because our trains are so packed, not enough carriages. It's peak time and that's what it's like, so it is a very rare occasion to be able to sit down on the train and actually read or just relax going to work. If I could do that it would be a magic moment"
(Commuter, 18-39, Manchester)

"What I really want to do when I commute is get there and know I'm going to get there when I'm supposed to"
(Commuter, 18-39, Manchester)

"I found that my great experiences or the ones I put in as good were when I was shocked that I actually had the service that we should get every day"
(Commuter, 18-39, Manchester)

"My magic moment was to actually get a seat on the train"
(Commuter, 18-39, Manchester)

Defining a miserable moment

"I've had more miserable moments on the rail network than I have good"
(Commuter, 18-39, Manchester)

"I was kicked off the train for only having one part of the two part ticket"
(Business/Leisure, 18-39, Newport)

Delays

Over-crowding
Not enough carriages on trains
Trains infrequent

Rolling stock
Cleanliness
Lack of Air-con
Luggage space
Bus replacement service

Staff
Inflexibility of staff
Jobsworth
Don't do enough to control antisocial behaviour

"I was travelling to Camden Road using the Overground and the train was delayed, it was overcrowded and extremely hot"
(Commuter, 40+, London)

"There's people drinking on the train, there's bad language everywhere, and then obviously you don't want the children to hear that. You don't see any staff on the trains, so if anything does kick off, there's no back up, you're stuck basically"
(Business/Leisure, 18-39, Newport)

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Commuters have come to accept miserable moments

- Commuters are more accepting of miserable moments and move on from them due to frequency of occurring and lack of choice of alternative options
  - difficult to get too worked up about miserable moments as they know they have to repeat the same journey tomorrow

- Miserable moments are more likely to be events that occur on a regular basis, such as overcrowding or delays

- Miserable moments more likely to stick with Business/Leisure
  - as travel is less frequent and the TOCs have less of a chance to redeem themselves
  - these moments resonate for a long time

"My miserable moments were just general like over-packing the trains with people and sometimes it can be quite dangerous it's that packed. There was one point where I was stood in between two carriages like squashed and it's just too much really. I don't want to travel with them sometimes but it's easier, it's an easy way of getting to work…"
(Commuter, 18-39, Manchester)

Illuminas

Beyond experiences what
else drives perceptions?

Emotional factors driving current perceptions
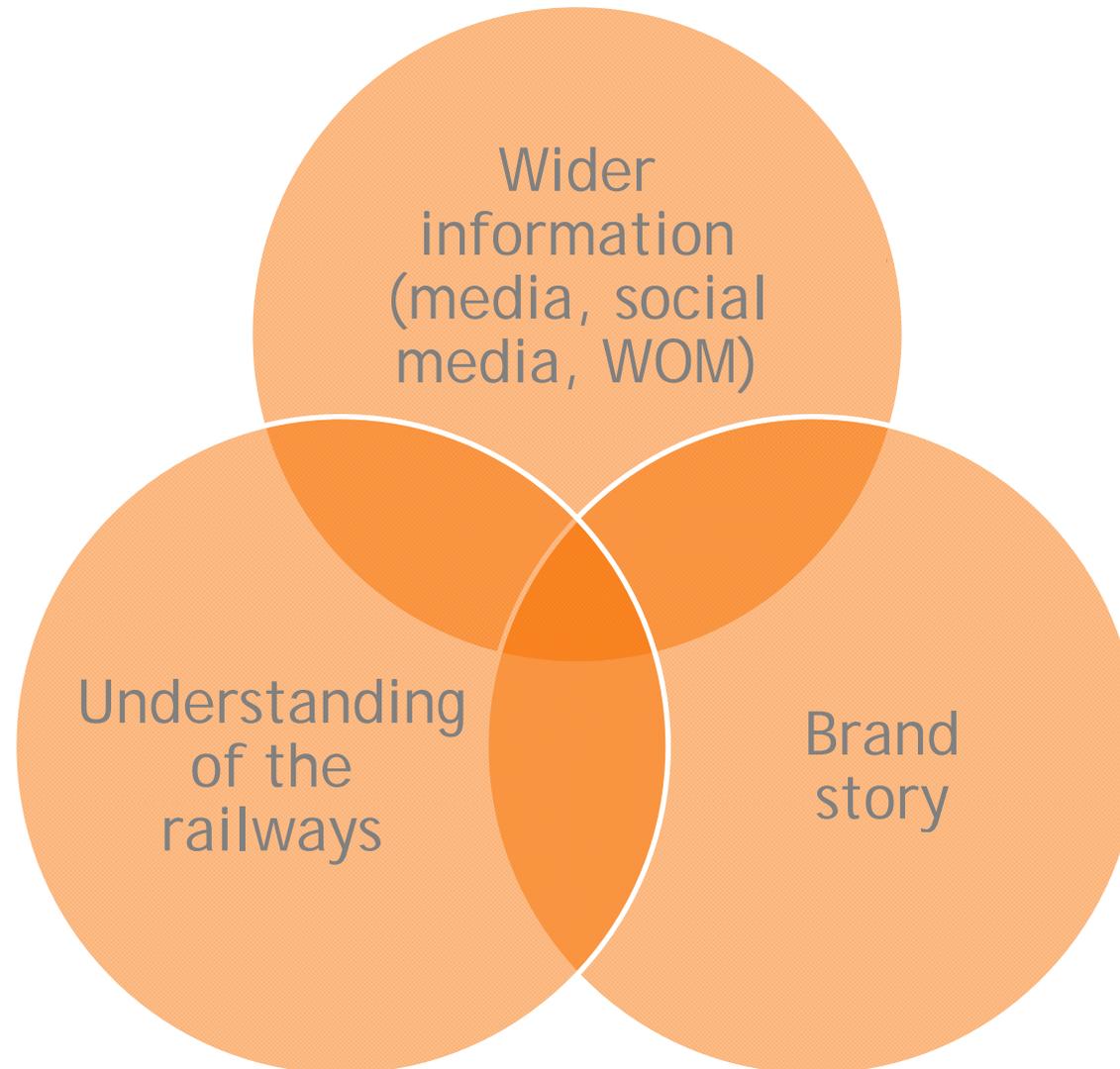
Wider information sources driving perceptions

Increasing influence

Media

- Mix of general railway and specific TOC press observed

- However, low salience and always negative

- Recent press recalled
  - Virgin franchise
  - HS2 & Crossrail (mixed reactions)
  - Rail profits/fare rises
  - Recent Spanish train crash

"I see and hear things but often they don't directly impact me or won't directly benefit me"
(Infrequent user, 40+, London)

Social Media

- News feed frequently full of negative journey experiences

- Typical tweets/statuses
  - Delays/cancellations
  - Overcrowding
  - Train temperatures
  - Rude staff
  - Lack of information

"Who would tweet that they had a great journey into work?"
(Commuter, 18-39, Manchester)

WOM
(friends/family/colleagues)

- Only other source that can be either positive or negative

- Commuters more likely to talk about negative experiences (delays, overcrowding etc)
- Business/leisure users more mixed and tend to be linked into discussing the overall experience

"If I hear that someone I know has had a nightmare, that sticks with me"
(Commuter, 18-39, Manchester)

These additional sources impacting rail perceptions tend to be driven by negative press coverage or individual experiences. However, this information is taken with a pinch of salt; framed in the individual's eyes within the context of personal experiences. Regardless, passengers feel the railway and individual TOCs make little attempt to communicate with them and counteract negative press

"I think it's probably negative because nobody really says when they've had a good experience so all you hear all the time is people's bad experiences because that's what sticks in your mind. You're not going to say 'oh I had a great walk into work this morning' are you? You're going to say 'this happened to me' and 'that happened to me' and everybody just rants about the bad stuff"
(Commuter, 18-39, Manchester)

"I think it's general human nature to focus on criticism, so I think that's a big part of it, but also there's not a lot to shout home about either. Sometimes you do kind of think it was a great service today because I was on time, but we never say it, do we? But really, because it is so rare, we should"
(Commuter, 18-39, Manchester)

Understanding of how the railways operate

What do passengers understand?

- Understanding is _**LIMITED AND VAGUE**_

- Aware that lots of TOCs run on different routes. However, knowledge of TOCs and routes operated is predominantly limited to individual experience

- Aware that 'someone' owns the tracks and possibly the same people own the station
  - Not all passengers understand that Network Rail actually own the infrastructure, most believing they are employed to maintain the rail network
    NB Network Rail is generally regarded positively

- Limited understanding of the Government's role - _"they have some sort of role"_

NB understanding often greater amongst older passengers who have experience of privatisation

How do passengers feel about this?

- Passengers feel _**CONFUSED**_ and _**NEGATIVE**_ associations result

- The railways are viewed as fragmented and this is not considered to benefit passengers

  - Drives inconsistency in experience

  - Results in nobody taking responsibility and caring about/thinking about passengers as individuals

- Assumption the Government's role negatively benefits them both from a rail user perspective and taxpayer perspective

Despite imperfect knowledge, passengers do not want educating about the workings of the railways. Instead they crave more predictability and a greater experience

Lack of need for greater understanding

"*If they do a good job I don't care about this stuff. I don't need to know it if things work well and my train gets me from A to B*"
(Commuter, 18-39, Manchester)

Foreign rail experience and understanding

- The overall experience of foreign railways felt to be considerably superior to the UK experience
    - Modern and futuristic rolling stock
    - More efficient and reliable
    - Cleaner

- Such experiences make passengers question how the UK rail network can be so unreliable in comparison

- Foreign ownership of TOCs is not a big issue
    - Few aware of who owns the TOCs and few feel they need this level of detail
    - Upon learning of foreign ownership many believe this should help bring UK rail up to foreign standards

*"Everything in Europe seems to be very, very, streamlined.
There's no passenger confusion. Basically the service is so
consistent so often there is no anxiety about the journeys"
(Commuter, 18-39, Manchester)*

Foreign rail experience highlights weaknesses in the UK rail network and knowledge of foreign ownership raises expectations that the UK rail experience should/will improve as a result

Funding of the railways

- Most (though by no means all) aware that there is *some* element of government/ taxpayer support for the railways
  - However, understanding of the mechanism for and level of, funding is very limited
  - Almost universal surprise that the ratio (of £1 for every £2 of fares) was so high

- After consideration, some could understand need for subsidy
  - Need to support important national asset
- But this also raises questions about distribution of subsidy
  - All TOCs equally? Commuter vs. longer-distance?

> *"You would expect the passenger to because they're using the service, but I would still expect the tax payer to be putting something towards it because it is a national service in a sense. We would be lost if we had no rail service"*
> (Commuter, 18-39, Manchester)

> *"It sounds a lot. It makes you wonder why the prices go up"*
> (Commuter, 40+, Newport)

- Overall, the subsidy issue generates additional discontent about costs
  - Fares continue to rise ahead of inflation, without corresponding service improvement
  - What is the 'true' price for rail travel when taxes are taken into account?

- The tax issue also tends to raise the salience of the idea of the railways as community resource and as such, one that everyone (not just regular rail users) has an interest in and should have (more?) say in

Revelation of existence and amount of public subsidy furthered the view that the railways should be of a higher standard and better value for money

Existence of brand story

- Awareness of TOCs is limited to those travelled with

- Many struggle to discuss how they feel about the railway and TOCs they travel with

  - Business/Leisure users can actually struggle to identify TOCs used, apart from when discussing Virgin

  "I had to look back to see which train operator I'd been on because I hadn't paid any attention to that and I realised I never had"
  (Commuter, 18-39, Doncaster)

- There is no relationship for many and the experience is very impersonal, driven by lack of brand visibility and lack of direct communications from TOCs

  - Perception of limited brand visibility with most TOCs
    - Lack of branding on trains and stations
    - Limited advertising
    - Often limited presence of staff

  - Very limited direct communications
    - Few messages from TOCs or wider bodies involved with the railways

- Perception that TOCs are not interested in getting to know customers

There is currently no brand story from any TOC bar Virgin. Many feel completely unengaged with TOCs and unable to articulate the brand values they stand for

Perceptions of TOCs

TOCs/Services tend to be grouped into four different categories

LOCAL COMMUTER/LEISURE TOCs

- Often unaware of, or pay little attention to who the franchise is
- TOCs used are considered to have very little brand identity

LONGER DISTANCE TOCs

- Experiential perception of these TOCs is better based on generally newer rolling stock, better on board facilities, more visible staff etc.

AIRPORT SERVICES

- The perception of a premium expensive service for short one off journeys sets these operators apart from the others
- Perceptions often linked to the wider experience when using e.g. going on holiday

VIRGIN (AND EUROSTAR)

- Considered to stand out from the other TOCs based on having a clear brand identity and offering a more pleasurable, differentiated experience

POOR

BEST

Longer distance TOCs considered the strongest, with Virgin being perceived as standing out from other TOCs. Poorest perceptions of smaller, local TOCs. Key differentiation comes from quality of rolling stock and on board experience

Perceptions of TOCs: regional perspective

- TOCs do not seem to have strong regional identities or affiliations
  - Even the Scottish and Welsh TOCs do not generate 'nationalist' sentiment

- Limited understanding in Glasgow and Newport of the role of regional government in the railways
  - A perceived lack of transparency of Welsh Assembly; passengers unaware of their role and have limited trust in them to implement any significant changes

- However, discussion of railway funding does start to raise questions about the role of the railways as a community resource and whether/to what extent there should be a more regional dimension to the railways

- London Underground is an exception:
  - Less sophisticated service accepted as trains are frequent and journeys are short
  - Also there is clearly a degree of affection (and tolerance) for London Underground/London Transport
    - Doing a good job in difficult circumstances
    - Part of the fabric of London life

"[IN RELATION TO VIRGIN] You're coming into contact with people who you feel are looking after you. They're checking you're alright. They're seeing if you want something. They're taking your rubbish away. They're providing newspapers. You don't get that on the local train"
(Business/Leisure, 40+, Manchester)

"Those First Great Western trains, the Reading to Cardiff train, the Swansea one, if there is ever a train that breaks down it is those"
(Commuter, 40+, Newport)

"I think you get middle of the road with First because they do buses"
(Commuter, 18-39, Doncaster)

"A good difference is Cross Country versus Arriva. Arriva trains you look at their trains and you think that is just a shed on wheels. Whereas CrossCountry trains are all quite modern, they are all quite nicely done up"
(Commuter, 40+, Newport)

"With First I think you know what you're getting and it's not going to be as lovely as Virgin, but it's not going to be as bad as Northern either"
(Commuter, 18-39, Doncaster)

"With Northern I kind of switch off. Virgin interact with people more, it's very much a personal touch. With Northern there is no personal touch except for probably one of the guards" (Commuter, 18-39, Manchester)

"You don't really know how [Northern Rail] are getting away with it"
(Commuter, 18-39, Manchester)

"It sounds bad but [Northern] is probably the least profitable and the profitable ones are the ones to London and the big lines"
(Commuter, 18-39, Doncaster)

A case apart

Across the board (even non-users/ irregular travellers) Virgin is held in high regard. It is believed to set the standard and performs well against many of the characteristics of best in class brands. Even where there are negative experiences, it is still believed that Virgin is doing something different and above and beyond other TOCs

PRACTICAL

| Good product | Consistent & predictable | Effective problem resolution |

- Relatively recent rolling stock, more technologically advanced on-train experience
- A reliable service with greater punctuality than previous operators
- Often aim to solve problems as they happen with limited fuss

EMOTIONALLY ENGAGING

| Staff excellence | Going the extra mile |

- Staff considered positive, friendly and helpful – genuinely wanting to make the experience better - opening first class to let people sit down when standard class is overcrowded, cleaning trains before boarding
- Staff visible at stations and on trains (guards, catering staff etc)
- Proactive in receiving customer feedback and listening to passengers
- Communicate well with passengers and take responsibility, for example when reservation systems not working profusely apologising over the tannoy to make passengers aware at each stop, acknowledging they have made a mistake, and trying to reduce confusion

CUSTOMER DIALOGUE

| Personalisation/ treated like individual | Feeling valued | Brand message |

- Believed to put the customer at the heart of decision making
- Profits perceived to be invested to benefit the customers
- Clear brand message – visible brand, consistent message across the wider Virgin brand. This enables everyone to have a point of view regardless of level of experience

Role in building trust

Virgin offers a consistent experience with strong staff performance, reinforced by other experiences and the wider brand presence

"I think [Virgin] says consistency. Everything else that goes to Richard Branson's name has usually got an air of consistency about it"
(Commuter, 40+, Newport)

"I commute and the relationship I have on the commuter train is different to **Virgin**"
(Commuter, 18-39, Manchester)

"They've got the blueprint for how to do it and they're the only one that you can physically see that are forward thinking. Everything they've got looks modern. They're looking at ways to entice customers to go with them whereas, for example, Northern just don't"
(Commuter, 18-39, Manchester)

"They seem to promote a sense of caring about the passengers as opposed to the other companies in the sense that they do provide a comfortable environment in which you can travel. They've just invested a little bit more money into the experience as a whole"
(Commuter, 18-39, Manchester)

"Virgin sets a standard that the others should achieve. I've been on Virgin, and you've got a 'meet and greet'. You've got somebody there in full dress uniform, it's like being on the airlines"
(Business/Leisure, 40+, Doncaster)

Confidence and NRPS

Passenger views of NRPS

- Participants were asked to complete an NRPS questionnaire as a pre-task. Completing the questionnaire is considered relatively straightforward

- Being journey based is considered accurate in terms of capturing the experience as it happens. Most believe that good and bad experiences would balance themselves out across the sample

- However, passengers acknowledge that their responses are not fully reflective of their overall feeling towards the railways. There is little opportunity to talk about more emotional factors in terms of mood and emotion

> *"It was easy to complete and I found it did reflect the journeys I make. However, it didn't let me talk about how I feel about any of my experiences"*
> *(Business/Leisure, 18-39, Newport)*

- Additionally, some feel the questionnaire is lacking the opportunity to embellish their responses and provide supportive information to help explain responses

  - Particularly so for the additional, experimental 'typicality' question, where it is considered necessary to help explain what the typical experience is

  - However, respondents also had the opportunity to expand on their experiences in a workbook, given along with the NRPS, which may have influenced reactions to the NRPS

NRPS focuses more on rational factors and doesn't enable consideration of the more emotional factors that are also key in engendering trust and confidence

Reaction to NRPS scores

- Passenger satisfaction with 85% of journeys is not considered surprising. Passengers make mental calculations based on the number of journeys they make and how many of those tend to be good or bad

- However, the results end up actually being interpreted as 15% or 1 in 6 journeys being unsatisfactory

- Additionally, passengers - particularly commuters - state that their journey satisfaction is measured against low expectations in terms of the experience on any one day

- Whilst the overall score is accepted, surprise comes when looking at individual TOC scores
    - Mixed reactions to individual TOC performance
        - Surprise some unknown TOCs so high
        - Differences in reactions between commuters and business/leisure users
        - Surprise Virgin is not higher

NRPS scores are considered fairly reflective of individual experiences, however, this is against low expectations

"Do you think the surveys might have been done during the times when the trains haven't broken down or have arrived on time; in that case everyone's really, really happy"
(Commuter, 18-39, Manchester)

"I think 85% is pretty low really. When I've spoken to people who go abroad to Germany and places like that everyone raves on about how good it is and how everything all seems to link in together"
(Commuter, 18-39, Manchester)

"If you're averaging, yeah (85% is about right). You have positive ones and then a really, really bad one. And what sticks in your mind is the bad one"
(Business/Leisure, 18-39, Newport)

"Grand Central should probably say, we need to work hard, even harder than ever now because we know we're the market leaders" (Commuter, 40+, Newport)

"I thought there would have been more difference between the operators in the south and those in the north" (Commuter, 18-39, Doncaster)

"I would have expected Cross Country to be above Arriva definitely" (Commuter, 40+, Newport)

On Northern: "I think they're fine. I use them like I say just for a short journey. You'd expect them to be somewhere in the middle. More of 86-87 up there" (Business/Leisure, 40+, Manchester)

"We've all been going on about Virgin, and Grand Central have come out on top. We did put them up there though didn't we" (Commuter, 18-39, Doncaster)

"Yeah I think Virgin probably didn't score as well as we thought" (Commuter, 18-39, Doncaster)

"I'm surprised that Virgin is not up there on a par with them" (Commuter, 18-39, Doncaster)

"They're being funded by the tax payers and by the commuters who have got no choice to go to other services. So those contracts shouldn't be re-awarded to those operators if people are that dissatisfied with the service" (Commuter, 18-39, Manchester)

TOCs	% satisfied
Grand Central	96
First Hull Trains	95
Heathrow Connect	94
c2c	93
Heathrow Express	93
London Overground	93
East Coast	92
Merseyrail	92
Virgin Trains	92
Chiltern Railways	91
ScotRail	90
East Midland Trains	89
Arriva Trains Wales	88
First TransPennine Express	88
Cross Country	85
South West Trains	85
Southeastern	84
First Great Western	83
Greater Anglia	83
London Midland	83
Southern	82
First Capital Connect	81
Northern Rail	80

71

Illuminas

Appendix

Enlighten.
Empower.

sky

Examples of service brands/companies:

- Banks
- Mortgages, Insurance
- Transport (rail, air, bus)
- Credit cards
- Digital TV
- Internet providers
- Telecommunications (e.g. Mobile, cable, landline)
- Utilities (energy, water)
- Medical (NHS, Dentists)

Don't let these examples restrict your thinking – any examples of a good service provider will be great

FOCUS ON CUSTOMER SERVICE

GOOD CUSTOMER SERVICE ON TELEPHONE

INNOVATIVE ~ COMING UP WITH GREAT IDEAS : *ON DEMAND*

SKY

Channel choices better than all competitors

Charitable work also – WWF

flexible YOU CAN ADD/ REDUCE YOUR PACKAGE TO YOUR NEEDS

PREMIUM SERVICE (DAVID BECKHAM ADS)

very visible: vans, adverts, dishes

Keep me updated : online, post with info

sports, movies and dramas

QUALITY BRAND #1 IN ITS FIELD

Is this SERVICE brand/company a current favourite due to a one off experience because of multiple experiences over time?

HAVE BEEN USING THE SERVICE FOR 5+ YEARS. OVERALL A GOOD EXPERIENCE OVER THE YEARS.

2: Favourite Service Brand 6

brands/companies:

- Banks
- Mortgages, Insurance
- Transport (rail, air, bus)
- Credit cards
- Digital TV
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- Telecommunications (e.g. Mobile, cable, landline)
- Utilities (energy, water)
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sky

Is this SERVICE brand/company a current favourite due to a one off experience because of multiple experiences over time?

2: Favourite Service Brand 6

73

2: I love this brand

Apple Inc.

They are the leaders and forward thinkers in technology, often the first to bring out something new.

Their products are of good quality and you know if you have an Apple product it won't let you down.

They are renown for being first and a name and brand you can TRUST

Think different

Is this brand a current favourite brand due to a one off experience or because of multiple experiences over time?

Multiple experiences over time

2: I love this brand

I ♡ APPLE

FUNCTIONAL SLEEK

RELIABLE STYLISH

Is this brand a current favourite brand due to a one off experience or because of multiple experiences over time?

Multiple experiences over time
They provide great product aftercare or workshops

2: I love this brand

APPLE

Innovation

LEADING INNOVATOR
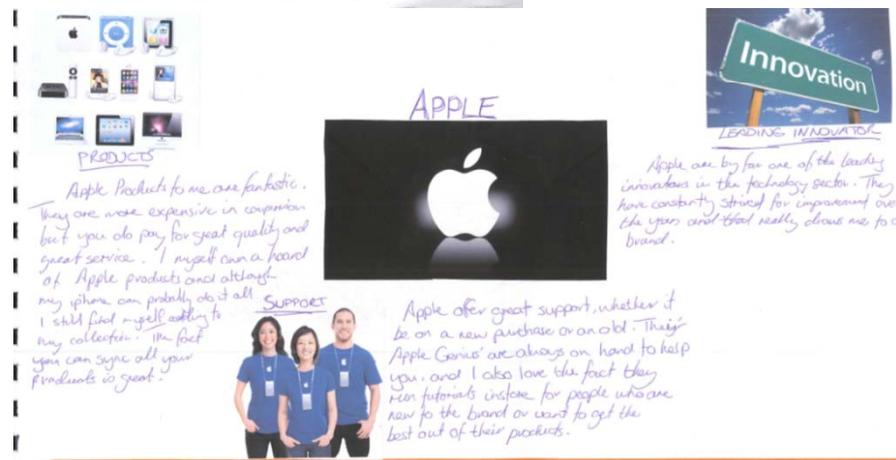
PRODUCTS

Apple Products to me are fantastic. They are more expensive in comparison but you do pay for great quality and great service. I myself own a hoard of Apple products and although my iphone can probably do it all I still find myself adding to my collection. In fact you can sync all your products is great.

SUPPORT

Apple are by far one of the leading innovators in the technology sector. They have constantly strived for improvement over the years and that really drew me to a brand.

Apple offer great support, whether it be on a new purchase or an old. Their Apple Genius' are always on hand to help you, and I also love the fact they run tutorials instore for people who are new to the brand or want to get the best out of their products.

Is this brand a current favourite brand due to a one off experience or because of multiple experiences over time?

Maybe not just because a an experience but one that sticks with me is as follows. Last year there was a recall on all 1st generation ipod nanos. I happened to have a battered one lying around so I thought I would go ahead and return mine as requested. To my surprise I was given a brand new 6th/7th generation ipod nano as a replacement. This to me was amazing customer service of the likes I had never seen before.

amazon

What is your _favourite **SERVICE** brand or company_? What is so great about this brand/company that makes you want to tell people about it? Do they do something particularly exceptional? How does the brand/company make you feel? What is it they do that makes you feel like this?

Describe and illustrate your thoughts by using pictures, images and words. You can take photos with your camera or use images from magazines, the internet, or your own collection of photos.

Examples of service brands/companies:

• Banks
• Mortgages, Insurance
• Transport (rail, air, bus)
• Credit cards
• Digital TV
• Internet providers
• Telecommunications (e.g. Mobile, cable, landline)
• Utilities (energy, water)
• Medical (NHS, Dentists)

Don't let these examples restrict your thinking – any examples of a good service provider will be great

24/7

Better Service with lower costs

Trustworthy

amazon

Its Quick, Easy and Convenient

SPEED 0530 0730

Best Return Policy

2: Favourite Service Brand 6

Is this SERVICE brand/company a current favourite due to a one off experience because of multiple experiences over time?

Multiple experiences, repeat business

Examples of service brands/companies:

• Banks
• Mortgages, Insurance
• Transport (rail, air, bus)
• Credit cards
• Digital TV
• Internet providers
• Telecommunications (e.g. Mobile, cable, landline)
• Utilities (energy, water)
• Medical (NHS, Dentists)

Don't let these examples restrict your thinking – any examples of a good service provider will be great

Lots of Discounts

Safe e convenient

Prompt Delivery

Fantastic Deals

Find Lowest Prices

Ease of Use

amazon

Can buy virtually anything from them.

No Scams

Great Communication

2: Favourite Service Brand 6

Is this SERVICE brand/company a current favourite due to a one off experience because of multiple experiences over time?

multiple experiences over time.

next

What is your **favourite brand or company**? What is so great about this brand/company that makes you want to tell people about it? Do they do something particularly exceptional? How does the brand/company make you feel? What is it they do that makes you feel like this?

Feel free to pick any brand you like, no matter how obscure, as long as you clearly tell us what it is about them that is to good!

Describe and illustrate your thoughts by using pictures, images and words. You can take photos with your camera or use images from magazines, the internet, or your own collection of photos.

ORDER BY 10PM
FOR NEXT DAY DELIVERY* TO HOME
AS STANDARD

BOYS 3 TO 16 YEARS

FASHION

next
NEXT.CO.UK

Shop online at **NEXT.CO.UK**
Or call **0844 844 8000**

EXPRESS NEXT DAY
DELIVERY TO STORE FOR 50p*

as pretty as a
butterfly
newborn up to 18 months

BOYS 3 MONTHS TO 6 YEARS

GIRLS 3 TO 16 YEARS

living - modern romance

There are so many reasons I have chosen NEXT.
• I love browsing through the Catalogue or Internet at my leisure at home.
• The delivery service is handy if you haven't got time to go in to store.
• Also its easy to have Items sent back through a free Courier Service.
I always find the Staff helpful and friendly, and the Stores Clean and set out well so its easy to find Items your looking for.
The best thing is they sell good quality Clothes, electrical Items, furniture to homeware and even flowers.

2: I love this brand

5

Is this brand a current favourite brand due to a one off experience or because of multiple experiences over time?

I have Shopped at Next for many years and have always come away Satisfied.

Left panel:

What is your *favourite SERVICE brand or company*? What is so great about this brand/company that makes you want to tell people about it? Do they do something particularly exceptional? How does the brand/company make you feel? What is it they do that makes you feel like this?

Describe and illustrate your thoughts by using pictures, images and words. You can take photos with your camera or use images from magazines, the internet, or your own collection of photos.

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- Utilities (energy, water)
- Medical (NHS, Dentists)

Don't let these examples restrict your thinking - any examples of a good service provider will be great

NHS | CALL 24 HOURS ON
Direct 0845 4647
www.nhsdirect.nhs.uk

RELIABLE
AVAILABLE TO ALL

Free NHS Health Check
Helping you prevent heart disease, stroke, diabetes and kidney disease.

EXPERT CARE
AFFORDABLE
PRESCRIPTIONS

2: Favourite Service Brand 6

Is this SERVICE brand/company a current favourite due to a one off experience because of multiple experiences over time?

Multiple experiences over time

Right panel:

Examples of service brands/companies:

- Banks
- Mortgages, Insurance
- Transport (rail, air, bus)
- Credit cards
- Digital TV
- Internet providers
- Telecommunications (e.g. Mobile, cable, landline)
- Utilities (energy, water)
- Medical (NHS, Dentists)

Don't let these examples restrict your thinking - any examples of a good service provider will be great

EASY ACCESS | ESSENTIAL
EQUAL OPPORTUNITIES
WELL ORGANISED
HELPFUL
FAIR
CARING | FREE

2: Favourite Service Brand 6

Is this SERVICE brand/company a current favourite due to a one off experience because of multiple experiences over time?

Multiple experiences

Values associated with the railways (1)

DO ASSOCIATE

Distant
- Limited/no staff interaction
- Lack of communication both in term of day to day use but also beyond this

Uncaring
- e.g. little compassion for passengers in difficulty during long delays, or assistance during platform alterations

Inflexible
- e.g. ticket restrictions
- Staff rigidity re tickets often considered unintuitive

Confusing
- Fares
- Station information
  - last minute platform alterations
  - contradictions with automated tannoy and human announcements
  - arrival times for delayed trains often too optimistic/unrealistic

DON'T ASSOCIATE

Values me
- Impersonal
- Not treated as individual
- *"They don't know who I am"*

Puts customers first
- Don't feel like a customer
- Limited weekend services – difficult/inconvenient to plan around

Positive staff culture
- Limited/no interaction, don't always see station/train staff
- Often unenthused/unreceptive during limited contact they do have
- local stations can be the exception

> *"It's not so much that we don't have a voice, it's just there doesn't seem to be anyone listening" (Business/Leisure, 18-39, Newport)*

> *"You get on the train and never see any train staff for quite a while and when you do they only grunt for your ticket" (Business/Leisure, 40+, Manchester)*

Strong associations with impersonal and distant service highlight the lack of emotional engagement along with issues at a basic level

Values associated with the railways (2)

DO ASSOCIATE

Out of touch
- Commuter journeys – old carriages cf. other countries
- Wrong priorities - investing in painting stations over rolling stock

Disorganised/ disjointed
- Different TOCs offering differing service levels, carriage quality
- Last-minute service alterations & lack of relevant information

Self interested
- Continual price hikes with limited justification
- Perception of profiteering
- Not seeing the benefit of rises in terms of day to day experience
  NB acknowledge investment in large railways but want to see investment elsewhere

DON'T ASSOCIATE

Forward thinking
- Some TOCs no investment in new trains
- Inability to keep providing a good service in poor weather condition
- UK not so compared to rail travel across the world
- NB Virgin the exception

"When was the last time someone who works on the trains stood on a commuter train to see what it is like"
(Commuter, 40+, Glasgow)

Respondents' associations suggest opposing priorities with passengers, and a prevalence of out-dated rolling stock

Values associated with the railways (3)

DO ASSOCIATE		DON'T ASSOCIATE	
Poor value for money	▪ Old rolling stock *COMMUTERS* ▪ Fare increases outstrip inflation, while services remain unchanged ▪ No visible results of investment *LONG DISTANCE* ▪ Advanced bookings can make travel very good value for money *LONG DISTANCE – off peak*	**Have confidence in**	▪ Cannot completely trust that train will arrive and be on time – the basic requirement for many!
			"Over five days, you'd be very lucky to get ten journeys hassle free and on time" (Commuter, 40+, Newport)
Enjoyable	▪ Adventure, scenic ▪ Comfortable, relaxing, hassle-free ▪ Takes you direct to the centre of town	**Has a good reputation**	▪ Only hear about bad news ▪ Media stories drive bad associations (e.g. 'leaves on the line') COMMUTERS ▪ Poor day to day experience so not endorsed
Heritage	▪ Long history associated ▪ Terms such as 'Brunel' used to describe this history	**Transparency**	▪ No information re expenditure of revenue, especially after prices hikes ▪ Unclear pricing

Lack of confidence ubiquitous. Some more positive associations amongst long distance off-peak passengers

Limited expectations of the railways

The expected level of service on the railways is lower than expectations of companies operating in other industries:

- Lack of competition drives this

No alternative mode of transport available

No alternative option but to use a certain TOC

"I tried car sharing once, but you had problems with people being late and the traffic on some days was awful. The train takes half the time" (Commuter, 40+, Newport)

"The only operator that passes through my station is Southern, who are notoriously bad, but I have little option but to use them" (Non-user, 40+, London)

- High need for some sort of service and passengers rely on the trains. Consequently, there is a feeling that 'we need the trains, more than the trains need us'
- In other markets, competition is rife, and a substandard service would result in customers switching to another provider. For example, if Tesco provided poor groceries you may switch to Asda, or if Vodafone's network coverage was poor, you may switch to Orange. As that luxury is not available, customers have no alternative but to accept lower standards of service.
- This can vary slightly by location...

More of a genuine choice: Trams & Bus provide a good alternative for shorter distance journeys and planes for longer distance

For routes to Cardiff, FGW provide a service as well as Arriva Trains. Customers willing to wait or time journey in order to take this service.

Comparison of the railways to other services

- The railways offer a unique service and consequently passengers do not judge the standard directly against other services they receive from other industries
- Instead, a good or bad service experience of the railways as a whole, is judged based on previous experiences that passengers have had when using the railways
- Specific TOCs are judged against each other, and consequently passengers are able to establish between 'good' and 'bad' service operators
    - Particularly when different operators run the same route, e.g. Arriva Trains and First Great Western running from Newport to Cardiff
- Though the railway service as a whole is not judged against other industries, specific factors are:

Ticket Prices	Technology	Staff
For journeys where alternative forms of transport can be taken, passengers will compare against the cost of these options, particularly driving and petrol costs	On board technology, but also peripheral elements such as ways to purchase tickets and delivery of information compared to air travel	Attitude of staff working on the railways can be measured against staff working in shops, restaurants and call centres

Differing expectations by journey type

- As expectations are low, basic service factors being met can result in a acceptable journey experience
  - Basic service factors differ for Business/Leisure & Commuter journeys:

Commuter	Longer Distance
✓ Arrival on time ✓ No delays ✓ Arrive at destination on time ✓ Able to board the train (sufficient space)	✓ Arrive at destination on time ✓ Able to get a (comfortable) seat ✓ Train is clean ✓ Food service available

"My expectations are very low, so if the train doesn't break down or if it is on time, then I am happy" (Commuter, 40+, Newport)

"On a longer journey I like to have coffee. I think the standards are higher than if you were just going from Cwmbran to Newport where I don't really care if there is nobody serving coffee, I just want to get from A to B" (Commuter, 40+, Newport)

"You're expectations are higher the more you pay, which is normally on the longer distance trains" (Commuter, 18-39, Doncaster)

Virgin trains

Expectations can also differ amongst TOCs – Virgin expected to provide a much higher service than local operators

- Commuters' service expectations are basic, as their main need is to get from A to B. They expect an efficient, no frills service
- Journeys for Business/Leisure purposes require additional features, such as comfort and cleanliness to meet expectations

Business/Leisure typically have more options for travel (mode and operator.) Hence they require additional services and have higher expectations when using the train

Exceeding expectations

- Additional expectations that don't create a 'magic moment', but are 'nice to have'

Air-con/Heating on board

Sufficient car parking space

Easy access to Platform

Consistent messages from staff/departures boards/announcements

Charge points for mobiles, laptops etc.

"I was travelling with my son who loves trains. When he saw the guard he asked him a million questions, and the guard answered them all and even showed my son where the driver sits and let him blow the horn"
(Commuter, 40+, Newport)

What type of service exceeds expectations?

- Almost all genuine positive experiences stem from staff interactions:
  - Giving information when trains are delayed
  - Finding cheaper tickets for the same route
  - Explaining quickest route to take
  - All round pleasant attitude
  - Interaction with children
  - Helping with luggage/push chairs
  - A simple "good morning"!

Examples of magic moments

TRAVELLING FIRST CLASS TO LONDON USING VIRGIN TRAINS - THE FOOD, THE OVERALL SERVICE FROM THE STAFF, THE EASE OF THE JOURNEY AND THE AMBIENCE ALL CREATED A VERY ENJOYABLE TRIP. ARRIVED IN LONDON FEELING VERY RELAXED AND READY TO START THE WEEKEND, TO MEET MY FRIEND WHO LIVES IN LONDON

AT MANCHESTER PICCADILLY TRAIN STATION, ABOUT TO BUY A SINGLE TICKET TO CHORLEY, BUT COULDN'T FIND MY RAIL CARD. THE MAN SELLING THE TICKETS TOOK PITY ON ME AS I HAD A LOT OF LUGGAGE AND STILL LET ME HAVE THE TICKET FOR THE REDUCED. RATE. HE WAS VERY UNDERSTANDING AND COULD SEE THAT I WAS DISTRESSED BECAUSE I HAD FORGOTTEN MY RAILCARD. I GOT ON MY TRAIN FEELING THANKFUL/ PLEASED THAT I HADN'T BEEN CHARGED EXTRA. WAS USING FIRST TRANSPENNINE EXPRESS

The benefits of train travel when everything runs according to plan and why many choose the train over the car.

Flexible staff who take time to understand the situation rather than just being 'jobsworths'

Examples of miserable moments

I'd brought an advance ticket to visit my mum. Upon arriving at the station I heard an announcement about platform changes but being partially sighted could not read the display information. Further there were no staff on the platform to assist me.

After much panic & upset I missed the train and had to spend a further £25 to buy another

TRAVELLING BACK FROM LONDON EUSTON, ON A VIRGIN TRAIN TO MANCHESTER PICCADILLY. THE TOILET FACILITIES WERE IN THE WORST STATE I HAVE EVER SEEN. THERE WAS SICK ALL OVER THE TOILET SO THAT IT WAS UNUSABLE AND I HAD TO GO AND FIND ANOTHER ONE AT THE OTHER END OF THE TRAIN, WHICH I FELT WAS A BIG INCONVENIENCE. I FELT REPULSED BY WHAT I SAW AND SINCE HAVE BEEN WARET ABOUT TOILET FACILITIES ON TRAINS

Inadequate staff to help out

Inadequate and unclean facilities on board

Full list of brand values tested

Trustworthy

Forward thinking

Something that I have confidence in

Enjoyable

Self-interested

Warm

Puts customers first

Integrity

Uncaring

Values me

Reliable

Believable

Impersonal

Has a good reputation

Disorganised

Confusing

Positive staff culture

Bureaucratic

Out of Touch

Poor value for Money

Inflexible

Unresponsive

Likely to recommend

Distant