

InterCity West Coast Rail Franchise Research

Qualitative debrief – Final Version

Prepared for: Transport Focus
Our reference number: 35721
Debrief date: 30-09-2015

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Background & Objectives

Publication note: In November 2015, after the conclusion of the research project, the DfT decided to re-time the franchise to align better with the HS2 programme. Virgin Trains will therefore now continue running services on the West Coast until April 2018.

Background and the need for research

The InterCity West Coast franchise is a hugely significant part of the UK's rail service. The franchise provides train services along the West Coast Main Line from Euston in the heart of London to Glasgow in Scotland. It serves the key cities of Birmingham, Liverpool, Manchester, Edinburgh and Glasgow as well as servicing the North of Wales to Holyhead.

Virgin Trains won the franchise for InterCity West Coast in 1997. The franchise was awarded for 15 years but at the end of this period (2012) the competition for the new franchise was suspended amid an unprecedented level of controversy. Virgin Trains was granted a further contract to operate the franchise until November 2014 (known as a direct award). A further direct award was announced in June, allowing Virgin to continue to run the service until September 2017 when a new franchise will start.



With scoping for the new franchise now underway, Transport Focus wished to conduct research to provide robust evidence on the needs and aspirations of InterCity West Coast passengers. This information will feed into the Department for Transport (DfT) consultation process and be made available to prospective bidders for the new contract.

Transport Focus commissioned Illuminas to carry out professional qualitative market research. This presentation outlines the findings from that research.

Objectives

The ultimate aim of the research was to establish what passengers want from a new franchise. This required understanding of passengers' current experiences with InterCity West Coast and their aspirations for any future operator

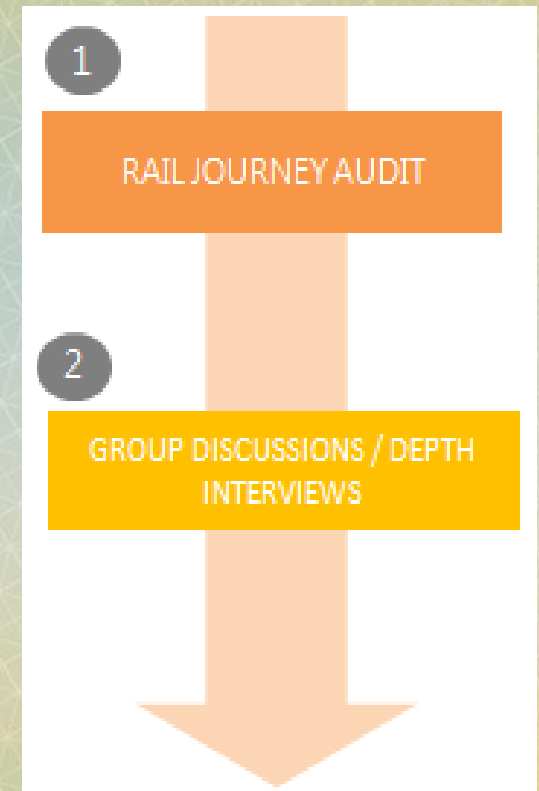
Research objectives

- To investigate passengers' overall experiences with InterCity West Coast in depth, looking at both positive and negative interactions, as well as key frustrations or sticking points
- To identify usage of and attitudes towards other modes of transport as well as what is weighed up / considered when choosing transport mode
- To understand the end-to-end passenger experience on Virgin West Coast, specifically:
 - Planning journeys, transport mode choice, ticket purchasing and ticket pricing;
 - Station needs (including interchanging, car parking);
 - On-train comfort (including seating/comfort; cleanliness; toilets; on-board catering);
 - On-train facilities (seat layout; luggage, optimising leisure and business journeys);
 - Demands for staff and information throughout the journey (how many; where; when; info during disruption; general standards expected when corresponding with the train operator, complaint resolution (formal and informal).
- To investigate any specific challenges/issues that may exist for passengers who have disabilities

Methodology

Method

- A qualitative research method was adopted, consisting of:
 - 16 x 2 hour focus groups, the locations of which were chosen to reflect a representative cross-section in regards to the InterCity West Coast coverage
 - 10 x 1 hour depth interviews with disabled passengers (particularly those suffering from visual impairment and mobility issues), split across the geographical locations where the focus groups took place
- We also conducted an extra x4 depth interviews, since some commuters in the relevant focus groups proved to be less frequent travellers than hoped
- All respondents completed a rail journey audit in preparation for the research, which was brought along to aid and be discussed within the research
- Specific recruitment criteria and quotas for group and depth respondents are outlined in the following slides...





Group criteria and quota split

Fieldwork dates: 7th – 17th September

Group number	Location	Age	Journey Type	Frequency	Ticket Class	Focused criteria	Other soft criteria. Mix of.....
1	London	Younger	Commuter	Frequent	Standard		5) Long commute / short commute on VWCT
2	London	Younger	Leisure	Occasional	Standard		1) Station to station; 2) Ticket type; 3) Journey length.
3	London	Mix	Business	Frequent	Standard		1) Station to station; 2) Ticket type; 3) Journey length; 4) Ticket bought self / someone else.
4	Liverpool	Younger	Leisure	Frequent	Standard	Student/younger end of age band	1) Station to station; 2) Ticket type; 3) Journey length.
5	Preston	Older	Leisure	Occasional	Standard	Older end of age band/more retirees	1) Station to station; 2) Ticket type; 3) Journey length.
6	Birmingham	Mid age	Leisure	Occasional	Standard	Weekend travellers	1) Station to station; 2) Ticket type; 3) Journey length.
7	Glasgow	Older	Leisure	Frequent	Standard		1) Station to station; 2) Ticket type; 3) Journey length.
8	Glasgow	Mix	Business	Occasional	First		1) Station to station; 2) Ticket type; 3) Journey length; 4) Ticket bought self / someone else.
9	Manchester	Older	Leisure	Frequent	First		1) Station to station; 2) Ticket type; 3) Journey length.
10	Birmingham	Younger	Commuter	Frequent	Standard		1) Station to station
11	Manchester	Mix	Business	Frequent	Standard		1) Station to station; 2) Ticket type; 3) Journey length; 4) Ticket bought self / someone else.
12	Colwyn Bay	Younger	Leisure	Frequent	Standard		1) Station to station; 2) Ticket type; 3) Journey length.
13	Colwyn Bay	Older	Commuter	Frequent	Standard		1) Station to station
14	Preston	Younger	Leisure	Frequent	Standard	Weekend travellers	1) Station to station; 2) Ticket type; 3) Journey length.
15	Liverpool	Mix	Business	Occasional	Standard		1) Station to station; 2) Ticket type; 3) Journey length; 4) Ticket bought self / someone else.
16	London	Older	Leisure	Occasional	First		1) Station to station; 2) Ticket type; 3) Journey length.



Depth criteria and quota split

Fieldwork dates: 7th – 17th September

Depth number	Location	Age	Journey Type	Frequency	Ticket Class	Other soft criteria. Mix of across all depths.....
1	London	A mix of younger and older across all depths	Business	Frequent	Standard	1) Station to station 2) Ticket type 3) Journey length 4) Ticket bought self / someone else
2	London		Commuter (longer distance)	Frequent	First	
3	London		Leisure	Occasional	Standard	
4	Manchester		Business	Frequent	First	
5	Manchester		Commuter	Frequent	Standard	
6	Birmingham		Leisure	Frequent	First	
7	Birmingham		Commuter	Frequent	Standard	
8	Liverpool		Leisure	Frequent	Standard	
9	Glasgow		Business	Occasional	First	
10	North Wales		Leisure	Frequent	Standard	

Headlines

Key takeouts



The InterCity West Coast experience is **mostly a positive one** for the large majority of passengers
- Taken in the round, Virgin West Coast is typically marked as **'7 or 8 out of 10'**



InterCity West Coast **holds up well in comparison to other modes of transport** (and for a large proportion of journeys other modes are viable alternatives) and in **comparison to other rail** journeys



While **rarely described as cheap**, InterCity West Coast is generally seen as offering **value for money**

- That said, the **fare structure is opaque**. Whilst there is a sizeable proportion of passengers travelling using **advance tickets**, some of those who aren't can feel that fares are **opportunistic profiteering**



There are **issues with the on-board experience** (including that on some trains not all passengers get a seat) but the more significant issues are about aspects off-train: **seamless ticketing; fares; and stations**



Furthermore, in certain important areas InterCity West Coast is seen as **increasingly lagging behind what are becoming expected norms** in retail and other modes of travel e.g. free WiFi, and/or a more personalised customer experience



While InterCity West Coast is good – even very good – as a rail service, it is **not outstanding when compared to the best service brands**

Improvement priorities focus on the 'here and now' and fixing things that are currently sub-optimum



JOURNEY PLANNING

Journey planning not seen as a priority for improvement, but some potential enhancements suggested including more proactive / outbound communication, particularly regarding service disruption and in terms of fare offers and fare optimisation



TICKETING

Greater transparency on ticket pricing
Make the 'rules' simpler and clearer
Seamless online ticketing process



STATION

More seating
More visible presence of staff with a clear *customer service* remit
Free (at least free for rail ticket holders) cleaner, smarter toilets
Expand retail / food & drink choices
Address Euston boarding issues
Better coordination for inward travel



ON TRAIN

Improved storage and security for luggage
Enhanced toilet facilities
Free and reliable WiFi
Consider role for an intermediate class ('premium economy')



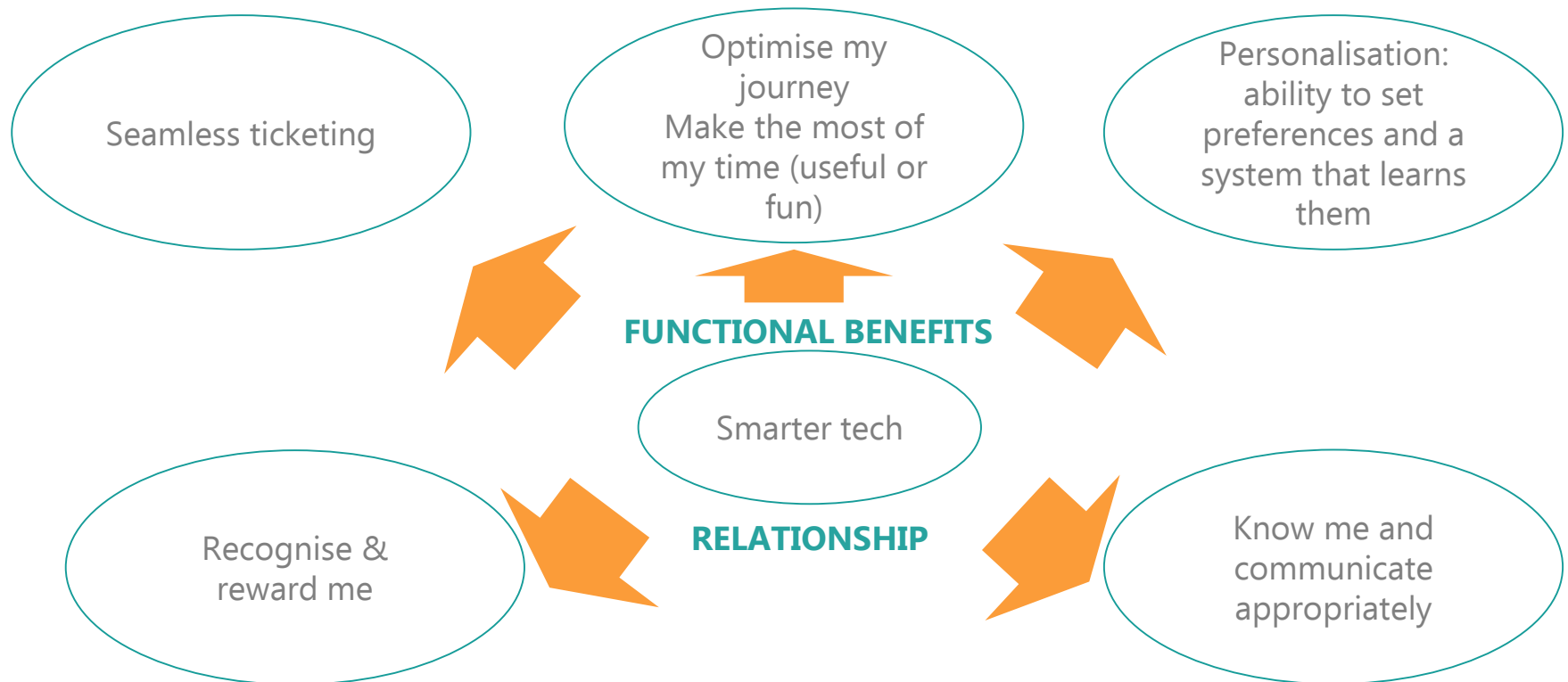
RECOGNITION & REWARD

Need to 'give something' back to passengers

- Worthwhile benefits not gimmicks
- Attainable: realistically achievable
- Inclusive: something for all types of passenger

Recognise the relationship with individual passengers and respond to personal preferences

When discussing unmet needs and longer-term aspirations, several recurring and overlapping themes emerge, with better use of new technology a key driving force



Underpinned by:

- An ingrained and genuine customer service ethos
- 'Everything the same, but nicer'
 - 'softer innovations' beyond efficiency benefits i.e. thinking about how that which exists can be made a little better, rather than pushing to something completely radical and new
 - Looking to address niche or underserved needs

Choice of travel mode

InterCity West Coast is a *positive* choice for most passengers

Alternatives are available and have been considered but the choice of rail - and InterCity West Coast more specifically – is an active one for most passengers

- Acknowledging this research was only among users of the InterCity West Coast services, passengers overall have positive views of the services
- And InterCity West Coast is seen as performing well against alternatives on a range of key criteria including:



Value for money



Journey experience



Reliability and punctuality



Amenity

- To some extent these strengths are generic to using the railways *per se* but there are also InterCity West Coast specific benefits

Whilst the car is a viable alternative for many journeys, the train has significant inherent advantages



For many (particularly longer) journeys, the choice of train over car is a 'no-brainer', although the cost-benefit analysis is weaker for group travel



On straightforward **cost comparison**, driving seldom offers better value than the train, especially for journeys over 60 – 90 mins. **Parking also often a significant cost issue.** For two or more travelling together, car travel can become much more cost-effective than rail

Trains seem expensive at first glance but when you look at the distance you would travel by car to make that journey and the cost of petrol, plus parking which is never cheap in city centres, trains are worth it.



Driving (and parking) is frequently described as **stressful and tiring** in comparison to the train. However, the personal space and autonomy of driving is valued by some

Stuck in the Dartford Crossing for half an hour, it's not happening.



Notwithstanding the occasional mishap the train almost always wins in terms of both **speed and predictability** against what is seen as an increasingly congested road system. The car does offer the benefit of a door-to-door journey.

You know the train is going from A to B, on a single line, there really isn't that much that can go wrong in between. I've driven back when there's road works and you end up in some country villages you don't even know where you are.



The train offers much more in terms of **amenity** than driving in terms of opportunities for both **relaxation and / or work**. That said, the presence / behaviour of other passengers can, at times, undermine these benefits

The whole getting on the train, getting a magazine out, sitting at a table, I quite like that. But obviously some people have more fun than others with drinking and socialising in large groups, which can be annoying.

Coach travel is rarely a seriously considered alternative to train



Only a few, typically younger and cash constrained passengers, use or consider coach as an option vs. train. Experientially, coach is almost always perceived as offering less but the cost differential can be significant



Coach **almost always cheaper**, sometimes very considerably so e.g. in comparison to a walk-up rail fare, but this is seldom sufficiently motivating for any but the most financially pressured

It's very, very cheap to go via coach, but I can't think of any other benefits!



Coach travel is of course typically much slower than rail and subject to the same **problems as driving in terms of congestion, road works etc.** impacting on journey predictability

I once went on a coach to watch England at Wembley. We had a nightmare of a journey there because the driver decided to go the wrong way, and even worse on the way back because of diversions. At least on the train you know you are going in the right direction!



Similar to rail, coach travel **does not involve the individual stress** and responsibility of driving

I would never normally catch buses because I always have this thing about 'oh it's dirty, it's packed', but it was actually quite pleasant. It's not as bad as you think once you've done it.



While it is acknowledged that coach travel has improved in recent years (e.g. seating, toilets, WiFi etc.) the journey experience is mostly seen as something to **be endured rather than enjoyed**

We took a coach last year. We had to go to Gatwick, and our times were very awkward and they didn't fit in very well with the trains, and we had a lot of luggage with us. It was torture! Never again.

The train compares well to air travel in most respects for relevant (long-distance) journeys



For (primarily) Scotland-London journeys, flying is a genuine alternative. Rail performs well against most criteria but there are aspects of airline customer service that stand out positively



Rail and air fares seen as **broadly comparable**, albeit air travel has more possible 'extras' (costs of getting to / from airport, parking, baggage fees etc.)

Booking a first class train from Manchester to London on the day is about £350, and I can get a British Airways flight there for about £400. There's not much in it!



Overall, flying is seen as **more prone to severe delays or cancellations** than rail. While flying is quicker 'point-to-point', the travel to and from airports and time needed at airport (security etc.) make total **journey times more directly comparable**

If delays or cancellations happen with flights you know you are in for a disaster! At least with the trains, once you reach your destination you are off walking into the city within minutes.



Air travel does not involve the personal responsibility of driving, but does **have its own stress points**: getting to and from airport, arriving early, security etc.

When I go up to Glasgow it's usually to see my brother and we like to have a drink...so no way do I want to be flying into Stansted and have a drive ahead at the other end!



Airlines do perform better than rail on various aspects of the customer experience: pre-boarding amenities, everyone seated, more seamless ticketing, a degree of personalisation / choice (e.g. selecting seat, meal), recognition & rewards

If you're carrying luggage you don't want to be changing trains three times, not getting the service that you're used to, not getting a seat - so I will take the worst airline in the world and maybe fly to get the service I want. That does happen.

Versus other rail operators, Virgin West Coast is seen as a leader



Most InterCity West Coast users have experienced other TOCs and a significant number can choose between TOCs for at least some of their journeys. Virgin West Coast is typically seen as a better – if sometimes more expensive service



Against 'lower cost' operators (e.g. London Midland out of Euston) **Virgin West Coast is seen as significantly more expensive, but offering a significantly enhanced experienced** and as such, represents a reasonable cost-benefit trade off. Against other operators more broadly, Virgin West Coast is seen as on a par in terms of pricing, but in most respects offers a better experience.



Virgin **West Coast typically compares favourably against other operators** on most aspects of journey experience

- Speed & reliability
- Trains
- Overall service ethos

It's still cheaper on London Midland but they stop at every single stop going, so it's a longer journey. Whereas you can go on Virgin, pay a bit more and get there quickly. So its weighing it up really; how organised you are and how much you're willing to pay.

I tend to be a lot more kind of nervous when travelling with East Midlands because I'm not kept up to date as much during the journey, and the customer service just isn't great; it's nowhere near as good as Virgin

You can just count on Virgin West Coast trains – you always see them at the stations, they are regular, always arriving on time. And, like their airlines, they give service with a smile.

The InterCity West Coast experience: Journey planning

Few problems in terms of accessing information for journey planning



Online is the default approach for journey planning information and most passengers describe accessibility and quality of information resources as good



- Website(s) typically first port of call when planning a journey and searching for fares
- No clear consensus on better or worse sites and indeed many use a combination of, or switch between, Virgin West Coast's site, National Rail and the various aggregators (Redspottedhanky, Trainline, Raileasy etc.)
- Choice of site is driven more by habit than objective evaluation of features (most seem to stick with the site they have got used to) albeit there is some awareness of booking fees charged by some sites
- There is a general (though not universal) assumption that the same fares are available through different sites

I use Trainline in general, but sometimes when I know I'm definitely travelling I will go to their [Virgin] website directly. I don't know why, because the Trainline is independent and gives you the same price, I just automatically go straight to Virgin West Coast if I know that's who I'm going with.

I find it straightforward online, if you're doing it a few times and you do it quite regularly you get used to it, and you're aware to make sure that's a direct route or is that a fast train, concentrate on the train times which is really good; the length of the journey times; I think that's useful.



- Not a clear consensus on Virgin West Coast's own website; there are both advocates and critics
- Many report that it is generally clear and easy to use
- More negatively, some feel there is too much Virgin brand promotion, it is hard to navigate, offers fewer journey options than other website providers e.g. Trainline

Few problems in terms of accessing information for journey planning



Feedback on other media is relatively limited; websites dominate for information



- There are some app users, typically more regular travellers and more likely to be somewhat younger (though not exclusively)
- Again there is no leading app; once passengers find an app that 'works for them', they tend to stick with it
- Apps mostly used for planning and 'up to the minute' information, although one or two have also purchased tickets via an App



- Very few use direct phone contact for information and journey planning
- Those who do describe a generally friendly and helpful service



Journey planning information is not seen as a priority area for improvement. However, some potential enhancements were suggested including more pro-active / outbound communication, particularly with regard to service disruption and in terms of fare offers and fare optimisation suggestions

The InterCity West Coast experience: Stations

Stations are not the highest priority for improvement but some important enhancements would be welcomed



Stations acknowledged as having (or being) improved, at least as regards to key hubs such as Piccadilly, New St. etc. but there is still room for improvement



- Widespread acknowledgement of the recent and ongoing investment at stations and resulting improvements for customers
 - Better quality and wider choice of retail and food & drink outlets
 - Mainstream High St. brands (M&S, Boots, Sainsburys, Pret); no longer just 'burgers and sandwiches'
 - For some, station bars and restaurants are becoming attractive venues in their own right e.g. at Manchester Piccadilly
 - Acknowledgement at smaller stations such as Colwyn Bay of the effort to improve appearance with flower beds & painting of the station / waiting areas / seating areas



- But there are issues:
 - Charging for toilets (particularly as they are often far from pristine) annoys many. More a case of something that feels wrong rather than a cost issue per se ('uncivilised', 'archaic')
 - Lack of staff visibly there 'to help'. While staff are generally helpful (some very much so), when approached, there is little sense of proactivity or of staff being 'primed and ready' to help, unlike, for example, the best retailers
 - Compounded by not knowing which staff do what at stations
 - Lack of seating outside of retail environments – as well as being inconvenient this can feel like a clumsy attempt to manipulate passenger behaviour
 - Smaller stations often feel rather forlorn and neglected, exacerbated perhaps by widening gap with the flagship hubs. This neglect is often felt to be in the form of lack of real time information or updates on trains. (It was noted that at Colwyn Bay there is a written board of train times)

It is nice that it's no longer just 'Pumpkin Café', and you can treat it a bit like a shopping centre, which can be quite pleasant if you have a bit of time on your hands

There's people just standing there just having a chat. I mean, there's literally no point in them being there. I've never had an absolutely terrible experience or a terrible encounter with one of them, but I don't really know why they're there

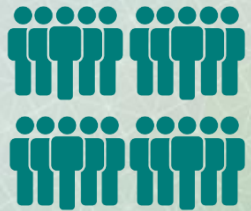
Euston is problematic



Passengers from all across the route have strong views about Euston



- Feedback on Euston is by no means universally negative
 - Recognition of recent improvements in terms of range of retail and food & drink outlets, development of the piazza
 - And recognition of / sympathy with the limitations of the site and the challenges of its role as a very busy central London hub
- Euston also suffers in comparison with St Pancras



- However, Euston shares many of the 'generic' problems of stations (paid for toilets etc.)
- And even for those who use Euston very rarely, crowd management is a major bugbear
 - Pre-departure 'scrum' on congested concourse with everyone focussed on departure board
 - Very little time between platform announcement and departure
 - Irritating and time consuming pre-boarding ticket check
- The entire process is seen as stressful and inefficient
 - Particularly for infrequent users, anyone with mobility issues and those with heavy luggage

Of course it's one of the major rail hubs in London, so you have to expect a certain level of 'chaos' every now and again!

It was like a herd of buffalo heading down the ramp at Euston. It was the most appalling thing.

Stations – key priorities



Key station improvement priorities

- Address Euston boarding issues. Many see smarter ticketing as key to this, but improving station design and more intelligent scheduling also seen as likely to help
- More seating
- More visible presence of staff with a clear *customer service* remit
- Free (or at least free for rail ticket holders) and cleaner, smarter toilets
- Keep expanding and improving retail and food & drink choices

Always at Euston it's virtually the entire concourse all looking up waiting for the time to appear on the boards and then they flip, trains are ready, and it's a mass of people galloping downhill, gathering speed towards the barriers. It isn't very nice at all, especially for the ticket inspectors.

It's not very nice when you are forced to ask someone for a seat, especially if your disability isn't obvious or apparent to anyone.

The InterCity West Coast experience: Ticketing

Ticketing

There are two major issues with ticketing: a complex and opaque fare structure and a ticket issuing process that is increasingly seen as outmoded and complicated



- Most of the passengers in this study were booking in advance online
- As such, are familiar with (or at least have been conditioned to) yield management pricing approaches
- However, while accepting variable pricing in principle, many struggle to understand its application in practice and thus, how to get the best deal
 - Large price differences between seemingly very similar journeys can seem arbitrary
 - Difficult to know if one has achieved the optimum price or what strategy one should adopt to do so
- Most feel unnecessary pressure to choose the 'right' or 'correct' tickets for their journey, with the threat of being 'stung' with a high cost if not chosen correctly



- The perceived convenience of booking in advance online is undermined by the need to queue, physically present a card, input a complex code and print out tickets at machines in the station (few print at home)
- Similar 'clunkiness' evident in the frequent checking of physical tickets (pre-boarding, on board, on exit etc.)
- The large quantity of tickets printed out and needed for the one journey is felt to be unnecessary and stressful, providing a greater chance of loss / separation of tickets in the lead up to or during a journey

Booking train tickets is a bit of a minefield, you never know what price you are going to get for the ticket that you are trying to book!

Tickets are so complex and the prices don't seem to be tied to distances. I would love to know how they go about calculating them!

Ticketing – key priorities



Key ticketing improvement priorities:

- Greater transparency on ticket pricing
 - Make the 'rules' simpler and clearer
- Seamless online ticketing process

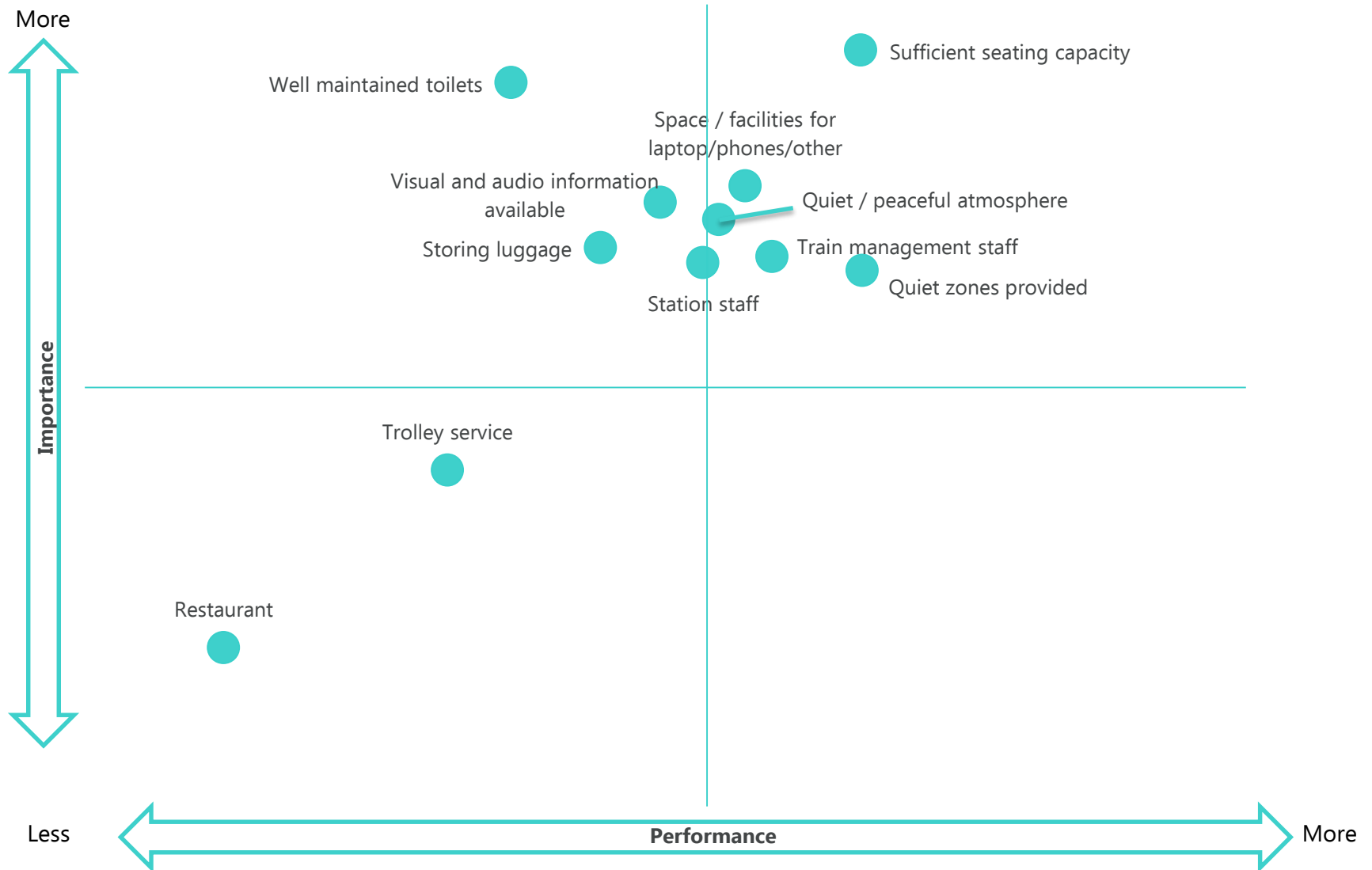
You feel so pressured to be booking tickets the 'right' way in order to get the correct price. Why can't there just be one single way to book which gives a fair price to everyone?

You'd think booking in advance would be job done, but there's so many more obstacles you have to go through to actually be able to use that ticket for your journey!

The InterCity West Coast experience: On train

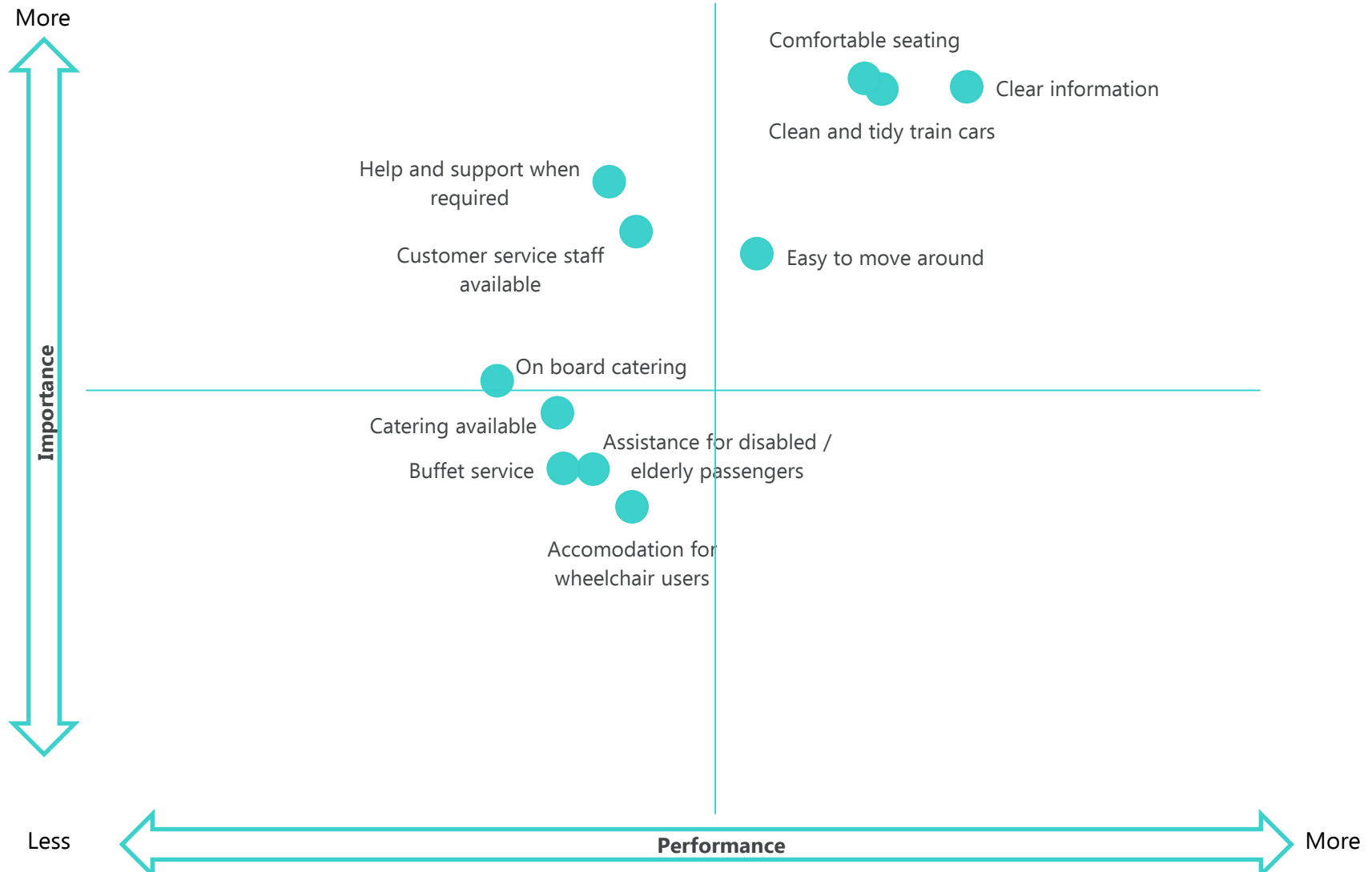


On train comfort (from self-completion exercise)





On train facilities (from self-completion exercise)



The on-board experience is generally good

The overall theme for on-board is centred around better personalisation to improve the experience. However, three issues raised consistently and emphatically as requiring attention as a matter of priority are **luggage, toilets and WiFi**



- For the most part, the on-train experience is a positive one
 - Passengers are happy with the punctuality and the frequency of the service
 - Modern rolling stock (perhaps showing a few signs of age e.g. lack of power points, but still often seen as better than competitors)
 - Pendalinos are not to everyone's taste – some complain about motion sickness
 - At least reasonable levels of comfort & space, overall good feeling of safety and security
- Not getting a seat can be an issue. Only a few isolated mentions by the participants of having to stand themselves, but most had experienced trains where standing was the only option for some of the passengers.
 - Seen as largely unacceptable, with concerns over safety as well as comfort and a feeling that it illustrates a lack of care on the part of the train company

It's got a comfortable stress free environment and it's a reliable service. I know that I will get to my destination on time four times out of five.

Buses have a rule on amount of people allowed standing, so why can't trains? They need to create some sort of rules and policy on this as it is getting beyond ridiculous, and is often putting people in danger

Key issues on-board: luggage, WiFi



- Limited amount and inaccessibility of luggage space a frequently cited frustration
 - Lack of overhead space means anything but smallest bags need to be stowed in end or mid carriage racks. As such, luggage is not only an issue for those taking lots of bags
 - Many passengers feel very insecure being parted from their bags and fear damage or theft (albeit only one participant had any direct experience of a stolen bag)
 - Also argued that overall train design is not conducive to managing large amounts of luggage – limited space, narrow aisles etc.
- NB – there appears to be very limited awareness of on-board CCTV

Why are the luggage racks above your heads so small and insufficient for your personal belongings? It makes no sense

How could anyone feel at peace knowing their main luggage is often out of sight and so far away at the end of the carriage. It's so insecure



- Good quality and free WiFi increasingly a base level expectation
- Paying (in Standard Class) for a patchy service seen as unacceptable and while 1st Class passengers appreciate complimentary service, quality is variable / unreliable

I just think, you pay more than enough for a ticket, then they make a profit off all the other things on the train – teas, water, coffee – couldn't they just include WiFi?

It's a joke actually. Branson actually does WiFi himself and is constantly advertising how good it is...except on his trains of course!



Key issues on-board: toilets, cleanliness



- No one is altogether happy with toilets on trains, but there are varying degrees of unhappiness
- The key issue is cleanliness – toilets in a reasonable state at the start of a journey but lack of ongoing cleaning means they are often found in a very poor state later on
- Smell in toilets and corridors is also often a problem
- The large WCs with electronically closing doors polarise:
 - Positives include: spacious, baby changing facilities
 - But door closing mechanism remains a source of anxiety for some
 - Many confuse the passenger alarm for the door opening / close button!
- Overall train cleanliness is seen as reasonable, although trains not altogether spotless and again, can become grubbier as the journey progresses. Regular rubbish collection is seen as important and seems to be a feature on many, but not all, trains

Another downside for me is obviously the toilets. They are just poor.... It's the smell, the door opens and a waft of.... Cleanliness, generally just could be better."

The trains really are sometimes unnecessarily messy – all it takes is a minute or two for a cleaner to quickly blitz the train down the aisles. It should be happening more often

Secondary issues: reservations, catering



- Issues with reservations include 'clustering' of reserved seats in a small area even on an uncrowded train
- Lack of 'policing' of reservations by staff leading to awkwardness and embarrassment for some passengers
- Many unaware of new facility to choose seating, but cite this as a useful improvement



- On-board catering / retail is seen as having improved in recent years. Wider choice of both food and non-food, but many feel there is room for further improvement
 - More healthy options
 - More acknowledgement of dietary diversity ('free-from', allergies etc.)
 - Providing key nutritional information (calories, fat content etc.) is increasingly the norm in food service outlets and would be welcomed
- 1st Class food offer generally well-regarded – plentiful, good choice, frequent service, although can be somewhat limited on weekends and late evenings

I think most people chance it taking a reserved seat that isn't theirs, hoping that the person is either not turning up or getting on at a station after they have got off! You can see why they do it; there is no one stopping them

I actually love the burgers on a Virgin trains, I deliberately don't have anything before I get on so I can have one!

Secondary issues: staff, personal security, Quiet Zone



- Staff on board (and at boarding) are typically seen as friendly, helpful and approachable and are often contrasted favourably with station personnel
- However, staff could be more visible, particularly on late night services with few passengers. Some suggest installation of communication points as on Underground platforms



- Few passengers had significant concerns about personal security, notwithstanding isolated incidents of anti-social behaviour by other passengers
- There are, however, questions about what staff would do (would anyone be available?) if something significant happened
 - Again, awareness of CCTV on trains is limited



- Quiet Zone is seen as a good idea overall
- Again, some isolated incidents of passengers not complying and the concept can be undermined by not being 'policed' by staff

Sometimes you don't see any staff walk past during the entire journey. It would be nice to just see a presence, for personal reassurance of security more than anything

A lot of people choose to be on their mobiles at some point when on the train, and we all have this thing where we decide to talk a little bit louder when on the mobile phone, so the more availability of quiet zones the better!

Secondary issues: communications, disruption



- On board communication rarely an issue and indeed, usually only top of mind during periods of disruption

- In line with other research, clear and regular updates during disruption are a key requirement
- However, it can sometimes feel that on-board staff, while doing their best, are little better informed than passengers themselves
- Few aware of delay-repay rights (and tend to assume much less generous and much more onerous process than is the case in reality)
- Examples of Virgin West Coast proactively advising customers on compensation (handing out forms etc.) very well received
 - Passengers genuinely surprised and pleased and 'miserable' moments changed into 'magic' ones



Instead of giving so many announcements over the speakers why don't Virgin West Coast substitute some of these for informing their staff face to face, so that we can get personal and human updates when they walk past

It's nice to get something back for a delayed journey. You actually feel like Virgin West Coast value your custom on their train, and you're more than just a paper ticket

Passengers with disabilities



- As for many passengers, the experience of arriving at, and navigating the station is the most difficult part of the journey for passengers with disabilities
 - Extreme anxiety is a side effect of a scenario in which they may not find it easy to get around or see their way, or are dependent on assistance (which is of variable quality), and fear missing the train altogether
 - Although most leave plenty of time before departure to make sure they can access the help they need, most found the crowding at Euston (and fact the car park is on the lower level) difficult to manage
 - Main issues with assistance included poor English, being late (or trying to combine disabled passenger needs, meaning one can be late for their train having dropped someone else off!), and simply not being there to support at agreed time / location
- On board experiences generally good, although marking out the priority seats as reserved for the disabled is preferable – most found it annoying to have to ask people to move for a seat
 - Staff generally good although could perhaps do more on busy services, in terms of making themselves known to the disabled passenger. Training staff on the buffet trolley to ensure they specifically ask blind / mobility impaired if they need anything would help, as this is the only chance most get to access refreshments on board

When people come up and offer help it's very useful to me if they can clarify that they are staff. Being blind I don't know if it's a member of the public being kind or someone who is there to help me onto the train

It varies based on whether I use my chair or the crutches. You get much more help in the wheelchair but you need it so much more on the crutches – staff seem oblivious when you're on crutches sometimes.

Virgin West Coast 1st Class is seen as a genuinely premium service

The 1st Class experience is highly valued and generally seen as worth the expense by users



- Most of our regular 1st Class passengers were either business, so not paying with their own money, but are often operating within a budget
- Or planned leisure travellers, able to take advantage of advance fares and /or weekend upgrades
- 1st Class generally seen as worth the premium either from a productivity or relaxation perspective:
 - More space / comfort
 - Less crowded
 - Table space
 - Plentiful and (at least) reasonably good catering



- Few improvements to the on train experience suggested by 1st Class users
- For non-users, the 'excessive' provision of 1st Class seating compared to Standard Class on crowded trains can be irritating
- Some (both 1st Class users and non-users) suggest there is room for an intermediate class e.g. with the benefits of 1st Class space and comfort, but without the catering

In my experience, 1st Class on Virgin West Coast is fine, it's kind of eight or nine out of ten for me.

It isn't distinctive enough from Standard Class to justify the difference in prices between them. I want more than just a blue seat if I'm paying that much more than Standard Class.

The commuter perspective

Commuters tended to be very positive about the service, reporting comfortable and efficient journeys for the most part



- Commuters rely on rail travel, acutely aware of how it compares to the alternatives in terms of speed, cost and convenience, and tend to be extremely positive about the service
 - They generally felt the trains were less crowded than other forms of transport, and hugely advantageous in terms of providing space and facilities to work
 - Many who took the same journeys regularly recognised staff and felt acknowledged in return
 - Delays and issues generally accepted as unavoidable, and considered well-managed for the most part
-
- Very familiar with station and train environments, and tended to have 'workarounds' for the things that frustrate – i.e. bringing food and drink with them or purchasing before they get to the station

I'd describe myself as their Number One Fan. They're right up there for service, information and facilities; I actually enjoy travelling with them. It's such a contrast to the Metro where you're dying to get off from the moment you get on

It's not perfect but when you compare it to driving to Liverpool from Manchester....you just wouldn't think of it. It wins on every level, and I don't think the cost is unreasonable at all when you compare driving and parking

On board – key priorities



- Improved storage and security for luggage
- Enhanced toilet facilities
- Free and reliable WiFi

Why can't they make the seats higher so we have underneath storage, or lower the racks above our heads so we have more storage there? These are simple improvements they can do that will help us so much

I don't want to have to trek two or three carriages down to find a toilet!

The InterCity West Coast experience: Value for money

Value for money



While Virgin West Coast is not considered cheap, it is seen as offering value for money overall, but perceptions of value for money are inextricably linked to perceptions of *choice*

I've always travelled by train and it really is a good service on the whole. People only remember when things go wrong on the train, they forget how good it is for servicing the main cities across the country every day

Mostly highly satisfied: may not have alternative benchmarks, but ability to benefit from low fares mean train still represents good value

It's just an easy way to travel where you have very little to worry about, and I enjoy the down time where I can read a book or take in the scenery, so it's always a positive choice for me to go by train

Mostly highly satisfied: InterCity West Coast generally stacks up against alternative modes and flexibility in journey planning opens opportunity for low cost fares. Most pick the train that requires the cheapest fare, and are happy to arrive 1 to 2 hours earlier/after originally planned if this means the cheaper fare

None

Choice of mode

Least satisfied: mind set is more similar to the classic commuter, with a tendency to feel somewhat 'exploited' as a captive audience. That said, there is a general acceptance (conditioning?) that one has to accept being 'stung' if one can't plan in advance

They know we choose them when we need to get to the centre of busy cities like Birmingham and Manchester quickly for meetings on the day, so why would they put the ticket prices down? We have very little choice for speed and convenience on the day

Lots

Choice of time

None

Alternatives available

Unlikely to benefit from bargain fares, but in a rational evaluation of alternatives, rail still attractive, although feel entitled to be particularly demanding about service provided

To be fair, what you get for your money is on the whole a reliable and trusted service that will get you from A to B, often over a long distance. But they should be rewarding us more for choosing them regularly, as the money they take out of our pockets is substantial

Notwithstanding the above, the absolute level of walk-up fares (and the sometimes huge differences with discounted fares) can be difficult for passengers to rationalise. It can sometimes feel opportunistic and profiteering on the part of the operator

Value for money: recognition and reward



While Virgin West Coast's fares are mostly seen as value for money, many passengers complain that little is given back to the customer

- In other environments, including travel (e.g. airlines) and retail, customer reward programmes are increasingly the norm
- Virgin West Coast (and rail in general) seen as lagging behind
- NB Few aware of Virgin Airmiles or Nectar collection via Virgin West Coast



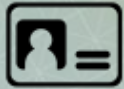
- Passengers offer a range of suggestions as to how this could be approached
 - Points schemes ('Rail Miles')
 - Freebies for regular passengers (e.g. food, upgrades etc.)
 - Special offers for regular customers
- Key themes for any approach:
 - Worthwhile: a genuine benefit, not gimmick
 - Attainable: realistically achievable
 - Something for everyone

Any sort of loyalty scheme that encourages us to use them more, and be happy to use them more. Just like Sainsbury's do with Nectar – it makes you want to buy from them again, and feel satisfied in doing so

All the main supermarkets do it – and look how successful they are

InterCity West Coast franchise: Aspirations for the future

Aspirations based on the current proposition focus on pre-boarding stage of journeys, specifically ticketing and stations



Strongly feeling that ticketing can be **simpler and clearer**, both in terms of pricing and purchase process:

- Greater transparency on ticket pricing online
- Seamless online ticketing process
- Easier/simpler collection of tickets in station
- Fewer paper tickets needed for each journey booked



Most were pleased to have seen developments in facilities on offer at stations in recent times, but would like to see more in terms of **service / comfort**:

- More seating
- A presence of staff with a clear customer service remit, visible at all times
- Free toilets, that are clean and easily accessible
- More expansion / offering of the retail and food & drink choices

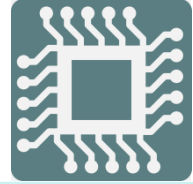


Some on-board suggestions, especially:

- Enhanced toilet facilities
- Free and reliable Wi-Fi
- Luggage – improved storage and security

Planning stage of journeys not seen as a priority area for improvement; most passengers rarely experience problems. Some potential developments were more pro-active and efficient communication, particularly around fare offers/optimisation, and also service disruption, although serious delays are an uncommon experience

Functional benefits centre around building more bespoke experiences



Smarter technology

Better use of technology is seen **as key to enabling enhanced services**

NB Passengers are primarily drawing on existing technology paradigms (e.g. airlines, retail, hotels) rather than imagining entirely new applications



Seamless ticketing

The start point for the customer experience is a simple ticketing process. And for most, this means on-line

- One-stop
- Establishes passenger's right to travel and contains all relevant information
- If I chose, I can encompass purchase of other services (meals, onward travel etc.)

Personalisation

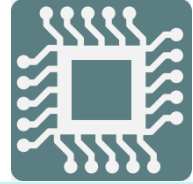
Ability to set preferences and a system that learns them e.g.

- Regular journeys
- Seating
- Meals entertainment
- Who travel with etc.

Optimisation

Making the most of one's time (however defined). Partly about providing (or enabling the passenger's own) technology to facilitate work and play. But also about providing different environments and experiences e.g. family zone, child free zone, work zone etc.

Functional benefits are a platform for relationship enhancement



Functional benefits delivered via new technology can help facilitate a sense of relationship



Know me and communicate appropriately

By understanding the passenger's habits and preferences, be able to anticipate my needs and make appropriate interventions

- Special offers
- Alerts & notifications
- Seek out my feedback

Recognise & reward me

Show passengers they are valued as customers by giving something back. Use knowledge about customers to develop relevant and targeted propositions.

'Softer' innovation also needs to be cultivated

- **A genuine customer-centric service**

- The importance of staff in delivering a truly enhanced service cannot be overestimated
- Staff need to embody and personify a wider brand commitment to the customer, exemplified by:
 - Taking ownership
 - Being proactive
 - Being empowered

For me, you can install all those things on a train. Those are great ideas, but customer service is the number one. It can't just be someone who chucks on a high viz vest with a name badge and that's it; they stand about and if someone comes up and asks them a question they might know the answer. It needs to be people in uniform, people who understand the purpose of that job and they relish a customer service atmosphere. The job needs to go from being a minimum wage job to a 'I-quite-fancy-that' job, you know?

- **Everything the same, but nicer'**

- 'Softer innovations' beyond efficiency benefits i.e. thinking about how that which exists can be made a little better, rather than pushing to something completely radical and new
- Looking to address niches or underserved needs
- A reflection of the increasing wealth of the marketplace and the desire for consumers to have fresh experiences, but also services that deliver more in terms of ease and convenience.

The whole thing needs lifting up, as does everything; you go into a restaurant or go and buy a new car. The new Audi garage, which is all glass and TVs and everything else. I think the whole experience should be improved, from toilets to staff to everything. It's quite good, but in two years' time again, should there be on-train, or in-train entertainment? Should there be an iPad that's attached?... I think the service generally needs to be upped.