

Qualitative debrief – CrossCountry Franchise Research 2015
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PREPARED BY ILLUMINAS
AN INDEPENDENT MARKET RESEARCH AGENCY

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T +44 (0)20 7909 0929 F +44 (0)20 7909 0921 E info@illuminas-global.com

www.illuminas-global.com



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Background & Objectives



2015 Background and the need for research

The present CrossCountry franchise, operated by Arriva UK Trains, is due to end in October 2016. However, it is anticipated that the Department for Transport (DfT) will negotiate a new short-term franchise with the current operator to run for the period until October 2019.

Transport Focus wanted to conduct research to establish the passenger perspective on the CrossCountry franchise and passengers' aspirations for it.

The findings will be used to inform the Department for Transport (DfT) and CrossCountry Trains as they enter into discussions about the scope of the new contract.



The ultimate aim of the research was to establish what passengers want from the next franchise. This required understanding passengers' current experiences with CrossCountry and their aspirations for the future operation.



Objectives

The aim of this research was to establish passengers' overall experiences with CrossCountry and their aspirations for the future.

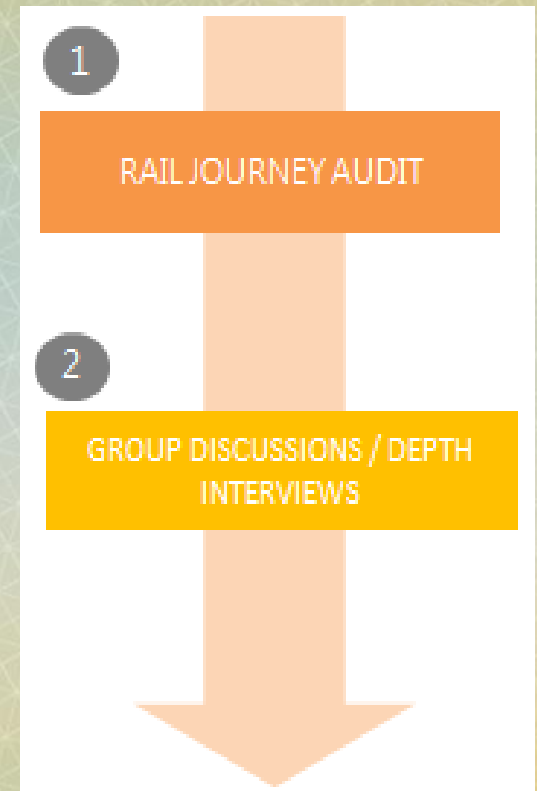
Research objectives

- To investigate passengers' overall experiences with CrossCountry in depth, looking at both positive and negative interactions, as well as key frustrations or sticking points.
- To understand the relationship people feel that they have with CrossCountry, and attitudes to improving/enhancing that relationship.
- To understand the end-to-end passenger experience on CrossCountry, 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, information during disruption, general standards expected when communicating 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:
 - 14 x 2 hour focus groups, the locations of which were chosen to provide a representative cross-section of passenger journeys in relation to the CrossCountry coverage.
 - 8 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.
- All respondents completed a rail journey audit in preparation for the research, which was brought along to 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: 16th November – 2nd December 2015



	Location	Journey Type	Ticket class	Journey length	Age
1	Edinburgh	Leisure	First class	Mix	50+
2	Edinburgh	Business/Commuter	Standard class	Mix	35-54
3	Newcastle	Leisure	Standard class	Mix	50+
4	Newcastle	Business/Commuter	Standard class	Mix	18-44
5	Leeds	Leisure	Standard class	Mix	50+
6	Leeds	Business/Commuter	First class	Mix	35-54
7	Leicester	Leisure	Standard class	Mix	18-44
8	Leicester	Commuter only	Standard class	Short/medium	50+
9	Birmingham	Leisure	First class	Mix	18-44
10	Birmingham	Leisure	Standard class	Mix	50+
11	Cardiff	Business only	Standard class	Long/medium	over 45
12	Cardiff	Leisure	Standard class	Mix	under 45
13	Exeter	Leisure	Standard class	Mix	50+
14	Exeter	Business/Commuter	Standard class	Mix	18-44



Depth criteria and quota split







Fieldwork dates: 16th November – 2nd December 2015

Depth number	Location	Age	Journey Type	Frequency	Ticket Class	Other soft criteria. Mix of across all depths.....
1	Leeds	A mix of younger and older across all depths	Business	Frequent	First Class	1) Station type 2) Ticket type 3) Journey length 4) Ticket bought self / someone else
2	Leeds		Leisure	Infrequent	Standard Class	
3	Leeds		Commuter	Frequent	Standard Class	
4	Edinburgh		Business	Infrequent	Standard Class	
5	Edinburgh		Leisure	Frequent	Standard Class	
6	Newcastle		Leisure	Frequent	Standard Class	
7	Birmingham		Leisure	Infrequent	Standard Class	
8	Birmingham		Leisure	Frequent	Standard Class	

Headlines



Key takeouts

-  A low profile brand, CrossCountry performs well on core passenger requirements. Taken in the round, they are typically marked as **'7 out of 10'**.
-  CrossCountry **holds up well in comparison to other modes of transport where there are alternatives for passengers.**
-  It is seen as **providing a better service than many other train companies.** However it falls short of offering the same kind of customer experience as market leaders such as Virgin.
-  People feel that it **offers value for money.** However absence of **some aspects of the service** do impinge on these feelings of value, such as **lack of seating** and absence of on-board staff members.
-  There are **issues, in particular with the on-board experience and a general customer need for an improvement in facilities.**
-  There is a **degree of affinity with the CrossCountry brand,** and a desire for a closer relationship.



There are a number of immediate improvements required from CrossCountry



JOURNEY PLANNING

Journey planning not seen as a priority for improvement.

- But there is a requirement for personalised communication that looks to 'add value' and create brand resonance with CrossCountry.
- Examples of this include: outbound communication that provides information on fare deals, up-to-date service information, onward trip recommendations etc.



TICKETING

There is need for greater transparency in ticket pricing.

- 'Rules' could be made simpler and clearer.
- In particular a clearer indication of where and how to obtain the best value tickets.



STATION

There is a desire for more CrossCountry presence at stations.

- There is a requirement for a more visible presence of staff with a clear customer service remit, so that passengers can purchase tickets and access fare and journey information.
- Also a pressing need for more and easier to use ticket machines.
- Changing (on some routes) can be stressful and disruptive.



ON TRAIN

Key priorities for improvement are:

- More visible presence of staff,
- more available seating,
- free and reliable Wi-Fi (and mobile phone signal).

There are also a range of other (lower) priorities for improvement:

- Toilets, carriage environment, seating reservations, seating layout, tables, catering, personal security, luggage storage.



TIMING AND FREQUENCY

There was a requirement for quicker and more frequent services (on some routes)

- Many passengers felt that there were too many stops on train routes.
- There was also a requirement for 'point to point' express services.



RECOGNITION & REWARD

Need to 'give something' back to passengers

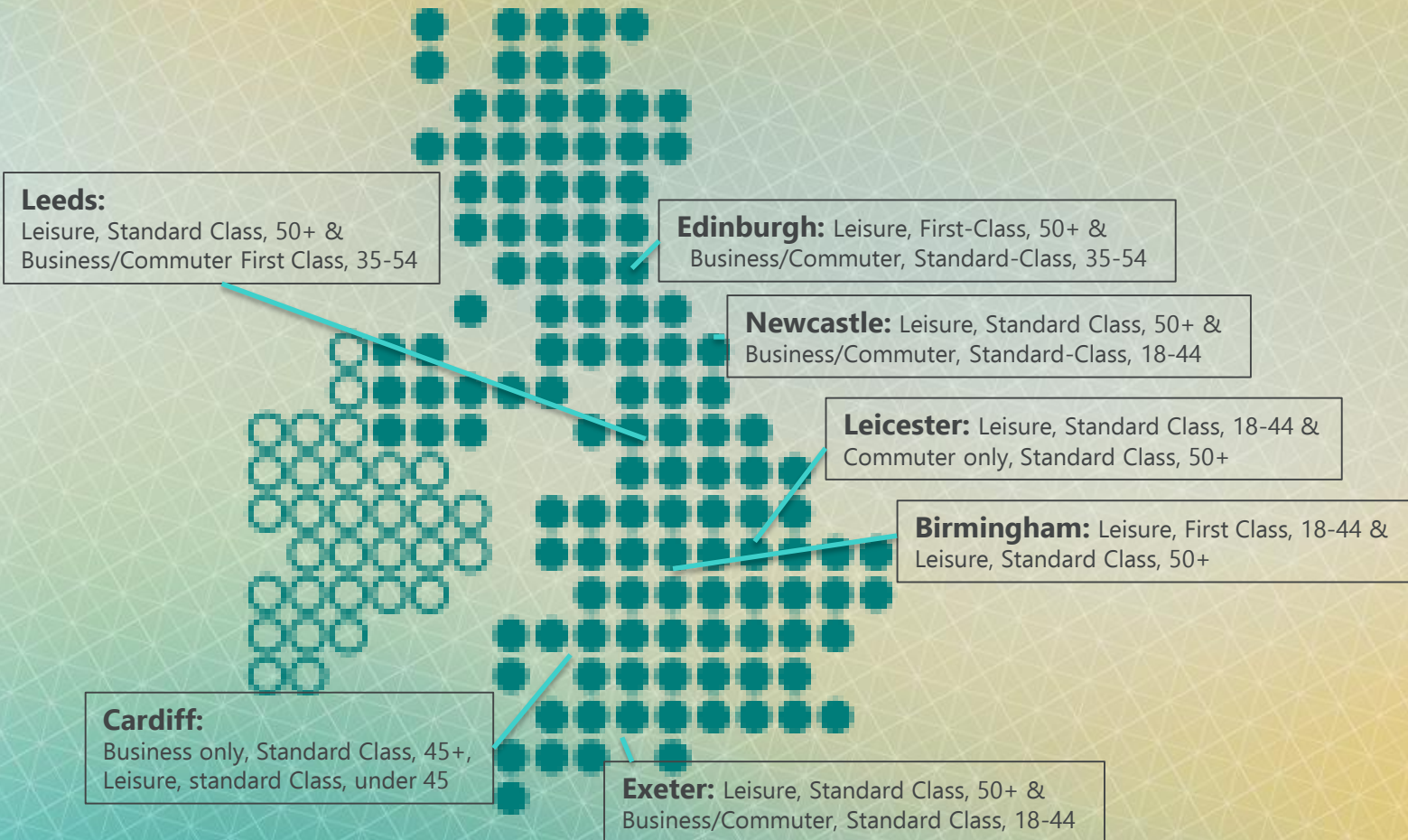
- Loyalty benefits and special offers.
- Raise the profile and understanding of CrossCountry.

Focus on Region



Regional focus

Summary: Sample differences between the focus groups in each area, (highlighted below) explain some regional variation. However, other variables such as city size, population threshold and network location, also have an impact.





Regional focus: Leeds – business/commuter and leisure

Summary: The CrossCountry service in and around Leeds is seen by participants as low profile. Key associations are of a friendly, punctual service but one that lacks the brand presence/'wow' factor of Virgin and of Grand Central and some of the comforts/facilities of Northern Rail (free Wi-Fi)



Regional Travel profile: Leeds is the key hub followed by other smaller stations such as Wakefield. Located in a central position on the CrossCountry network, passengers in these groups take a range of journeys predominantly to Birmingham, Sheffield, and Newcastle but also further afield to stations in Scotland (Edinburgh and Glasgow) and the South such as (Cheltenham, Bristol and Southampton.)

How it compares to other TOCs operating in the area:



Virgin Trains East Coast: offers more of 'a travel experience' likened to taking a flight. This is driven by its higher brand visibility, modern carriages and 'City to City service' from Leeds to London.



Grand Central: Very similar to Virgin InterCity East Coast in that it offers the station to station experience as well as a very good customer service. However it is not as well known or used by Leeds passengers



Northern Rail: seen as being on a par overall with CrossCountry. This seems to be mainly due to them offering free Wi-Fi on some trains, a big plus for Business/Commuter passengers in the Yorkshire region.



Relationship: The majority of our participants in Leeds do not feel that they have a relationship with CrossCountry. Typically CrossCountry has a low awareness and brand association amongst the group in Leeds. Passengers trust it to provide a reliable but basic rail service.



Key associations and improvements required

Positive associations:

Punctual and reliable, helpful and friendly service, good/proactive customer communication.

Negative associations:

Basic A-B service with few if any frills, lacks the 'wow factor' of Virgin Trains East Coast and Grand Central, crowded train carriages.



Key improvements required:

Better branded presence, newer trains, loyalty scheme with regular service.





Regional focus: Leicester – commuters and leisure

Summary: The CrossCountry service is not very high profile and as a result, amongst the Leicester groups, is not as well regarded as Virgin or East Midlands for long haul journeys. The regular train services to Birmingham are also routinely overcrowded and uncomfortable. At the same time it does provide a regular, cheap and quick service especially for passengers in the immediate area.



Regional Travel profile: a central hub in the East Midlands region. Focus group passengers typically travel from outlying areas such as South Wigston or Narborough into Leicester. Birmingham is by far the most popular destination from Leicester. However, passengers do travel further afield to locations such as Stanstead and the South.



Relationship: with a CrossCountry monopoly of the mainline service to Birmingham and many local routes, participants do not feel that they have much choice in TOCs. CrossCountry is generally seen to be functional, nondescript, basic and lacks brand presence. At the same time it provides a much appreciated quick and efficient lifeline for many passengers making trips into and out of Leicester.

How it compares to other TOCs operating in the area:



East Midlands: Passengers feel that the East Midlands carriages are more spacious and there is better seating availability. At the same time, the customer service is felt to be much better on CrossCountry trains. Service at Leicester station – managed by East Midlands – was regarded as very poor.



Key associations and improvements required

Positive associations:

Punctual and reliable services, friendly, helpful staff, good value fares.

Negative associations:

Unmanned stations, a budget/no frill services, low brand presence.



Improvements required:

Station staff in outlying stations (South Wigston and Narborough) and more staff presence at Leicester, better branded presence, introduce loyalty schemes.



With local services overseen by East Midlands and CrossCountry, Virgin is not a local competitor. At the same time it is used on other routes across the country and seen as the 'gold standard' of train service for many Leicester passengers. CrossCountry was felt to be 'budget' in comparison to Virgin which was seen to offer a much better overall travel experience.



Regional focus: Birmingham – leisure (1st and standard class)

Summary: CrossCountry provides a familiar, mostly comfortable and good value service to participants. While it lacks the presence and clear identity of some rivals, it is held in some affection although seen as underachieving.



Regional Travel profile: Leisure participants' journeys from Birmingham cover all directions and varying trip lengths. Many make a combination of shorter trips (Nottingham, Wolverhampton) and longer distance (Manchester, Newcastle, London) on both CrossCountry and other TOCs. Destination drives choice of TOC and as such, most also have experience of others (esp. Virgin West Coast and London Midland).



How it compares to other TOCs operating in the area:

Virgin West Coast: a more upmarket service and a much higher profile but seen as serving a somewhat different market (more 'business' orientated) and more expensive.

London Midland: While tolerable for short journeys, often a poor experience compared to CrossCountry for longer trips – crowding, delays and limited on-board comfort/ facilities.



Relationship: These passengers feel some (albeit weak) affinity with CrossCountry. While they struggle to very clearly articulate what CrossCountry represents, there is a broad consensus about the brand as homely and middle of the road and passengers trust it to provide an at least reasonable service.

Key associations and improvements required

Positive Associations:



Punctual and reliable, good value overall.

Negative Associations:



Journeys can be too long (with too many stops and / or changes), 1st Class is an improvement on Standard but not a 'premium' product.

Improvements Required:



Higher profile, improved on-board amenities (food, Wi-Fi, luggage space), newer trains, loyalty scheme/ special offers.



Regional focus: Exeter – leisure and business/commuter

Summary: The CrossCountry service in and around Exeter is felt to be the most premium offering available, and often compared to Virgin services in terms of service and on-board experience. Felt to provide a 'homely' and pleasant on-board experience compared to Great Western Railway and South West Trains who seen to be more 'careless' towards the customer, and certainly below CrossCountry services in terms of overall performance.



Regional Travel profile: Exeter Central/St. David's and Plymouth stations serve as the key hubs for the participants, particularly for leisure users travelling in from the smaller market towns of Newton Abbot/Totnes for shopping/cinema etc. Exeter is a key station for those travelling for business/work further afield to Birmingham/Reading. Some 'medium' sized stations such as Taunton & Tiverton are also key for those travelling shorter distances to work in Plymouth / Cheltenham etc.



Relationship: Vast majority of passengers in Exeter groups do not feel that they have a relationship with CrossCountry. However, most associate a punctual service/pleasant train experience with CrossCountry services, and as such there is some desire to see more/some marketing of the service to establish a presence/brand image in the area, which some felt would make it easier for them to actively choose to use CrossCountry services more.

How it compares to other TOCs operating in the area:



Great Western Railway: seen as providing an 'average' service, which is reliable the majority of the time but on-board experience / cleanliness and customer communication felt to be consistently poor.



Key associations and improvements required

Positive associations:

Clean and pleasant on-board experience, punctual and reliable service, modern rolling stock.



Negative associations:

Lack of 'personal' luggage space, crowded train carriages, lack of 'human' service on board and catering offering.



Improvements required:

Presence of on-board staff, clearer / more customer communication (tannoys muffled / not always updated when on board).



South West Trains: seen to be a very non-customer centric service, and also noted to have old fashioned rolling stock, providing a 'bumpy' and 'rickety' journey. Also noted to often be delayed / cancelled.



Regional focus: Cardiff – business, leisure

Summary: CrossCountry is seen by participants as reliable and punctual, and many have a great familiarity with the service. Most see it is undifferentiated and slightly behind the times, especially in comparison with the likes of Virgin. Value for money is seen as good, but crowding and lack of modern amenities such as (free) Wi-Fi and plug sockets frustrate people.



Regional Travel profile: Amongst participants Cardiff is a hub for both national and local travel needs, with Bath viewed as the main place for services changes for onward destinations. Key destinations include Birmingham, Bath, Bristol, Newport, Reading and Plymouth (and other South Coast / holiday destinations e.g. Paignton). People also take trains for longer journey options such as to the North of England and Scotland. Whilst Birmingham, Reading and London are especially key for business travellers.



Relationship: No perceptible relationship with CrossCountry, although generally held (especially by business travellers) to be satisfactory on most aspects and strong on punctuality / reliability (both business and leisure). CrossCountry seen as functional but has very few defining characteristics and engagement with the brand is low.

Key associations and improvements required

Positive associations:



Punctual and reliable service, direct routes are quick and easy, staff pleasant where seen.

Negative associations:



Crowding a key issue, some carriages require an update, catering is fairly poor or non existent, (free) reliable Wi-Fi and plug sockets much needed.

Improvements required:



Cardiff station requires improvement, especially at platform level, staff visibility is low on board and they are slow to act/enforce the rules of the railway (reserved seats).

How it compares to other TOCs operating in the area:

Great Western Railway: held to be slightly better in terms of carriage quality than CrossCountry, and this was very much seen as a product of serving London (considered to be a driver of superior service offerings overall). However, not greatly differentiated beyond interiors / cleanliness.

Arriva Trains Wales: seen as distinctly inferior ('bone-rattler') and cleanliness on board much poorer than CrossCountry. Generally considered to be over-crowded, unreliable, and although cheap, a poor level of service.





Regional Focus: Edinburgh – leisure and business

Summary: The market in Edinburgh is a quite a crowded one, with smaller and larger operators active and air travel being a viable alternative for some trips by participants. Some find the range of operators quite confusing (perhaps compounded by Virgin’s takeover of East Coast in addition to West Coast). As a result of this, CrossCountry struggles to stand out.



Regional Travel profile: Most participants make quite long journeys to / from major cities of the North of England (Newcastle, Manchester, Sheffield etc.) for business and leisure but with some very long journeys to the South West (Cardiff, Tiverton, Exeter) mainly for leisure.



Relationship: CrossCountry (and indeed other operators) are often selected by these passengers more or less by default i.e. timing and destination determine operator used. That said, CrossCountry is seen as a solid, if middle of the road choice



How it compares to other TOCs operating in the area:

Virgin Trains East Coast: seen as providing a premium service, although lagging behind West coast in some respects (e.g. rolling stock) and as having lost some valued aspects of the old East Coast (e.g. loyalty scheme)



ScotRail: primarily used for short (e.g. Edinburgh to North Berwick) or intermediate journeys (e.g. between Edinburgh and Glasgow). Seen as similar in some respects to CrossCountry in providing more of a local, stopping type service rather than ‘express point-to-point’ operation. Rolling stock described as more ‘commuter-like’



TransPennine Express: used on parts of journeys in the north of England. Seen as providing very basic facilities, more akin to a local bus service.



Key associations and improvements required:

Positive associations:

Punctual and reliable service, good value.



Negative associations:

Crowding, poor Wi-Fi, limited 1st Class offer.



Improvements required:

Higher profile
Rewards and offers.



Regional Focus: Newcastle – leisure and business / commuter

Summary: Amongst these groups CrossCountry has limited profile and is seen as the 'poor relation' in comparison to Virgin Trains East Coast, but is preferred to small, local operators such as TransPennine Express



Regional Travel profile: Most business / leisure journeys by participants were in cities within the North of England (Manchester, York, Leeds, Sheffield etc.) with Edinburgh typically being the northernmost destination. Many also use East Coast for certain of these trips well as for London journeys. Commuter journeys are short distance e.g. Newcastle – Morpeth, Newcastle – Durham.



Relationship: CrossCountry lacks a strong identity to these passengers and is overshadowed by Virgin East Coast. The service is seen as acceptable for the most part, but rarely exceptional. Slow journey times (especially when compared with East Coast), overcrowding and lack of choice on some routes means CrossCountry is seen as having plenty of room for improvement.

How it compares to other TOCs operating in the area:



Virgin Trains East Coast: seen as the leading provider in the area, offering quick journey times, modern trains and a high standard of on-board service



Key associations and improvements required:

Positive associations:

Punctual and reliable service.

Negative associations:

Crowding,
slow journey times.



Improvements required:

Refreshed rolling stock,
slow,
better station amenity (for commuters using outlying stations).



TransPennine Express: As with Edinburgh passengers TransPennine used on parts of journeys in the north of England. Seen as providing very basic facilities, more akin to a local bus service.



Focus on passenger type

The commuter perspective

Commuters do suffer from overcrowded services in some cases. At the same time, these are recognised as not as bad as those experienced by commuters in the South East. Passengers mentioned short journey times and punctual services as reasons for the overall experience being a good one.



- CrossCountry compares favourably with other modes of transport in the regional transport infrastructure.
 - Many commuters take short journeys, and any issues around crowding are far outweighed by reliability, convenience and low cost.
 - Delays and related issues were very rare and considered well managed for the most part.
-
- Train services do tend to be crowded and there is a lack of available seating at peak hours.
 - Many commuters did complain about the lack of seating and facilities to work/relax.
 - Many commuters felt that the timetable could be improved and called for an increase in the number and variety of services available. A key requirement was the introduction of more direct services between cities.

"I use the CrossCountry train when I'm travelling from Narborough or I've been to Leicester. I use that about three times a week generally. It's just an alternative to the bus: it's a lot quicker and it's about the same price really, which is a bonus."

Commuter, Leicester

"You certainly do get crowded trains. At the same time, I don't think it feels as crowded as an East Midlands train; you are a lot more squished in when you want to go down to London."

Commuter, Leicester

The business user perspective

Business users often do not have a choice of TOC provider. When compared to other TOCs, CrossCountry lacks the premium service of Virgin but compares well to other TOCs on reliability, punctuality and cost.



- CrossCountry stands out on its reliability, punctuality, cost and customer service.
- Due to a lack of alternatives for many business users, expectations around service and environment for CrossCountry are lower than for some TOCs that operate regional hub to London services.
- At the same time, it performs well against many other train companies. It is seen as offering a better on-board experience than Great Western Railway and East Midland. It is also regarded as superior to other TOCs, such as the TransPennine Express, in regard to comfort.
- There was a need for greater staff visibility when the service was crowded and they were required for disputes over reserved seat.
- The lack of free Wi-Fi is a particular bugbear amongst the business group. The ability to carry out work whilst travelling is a key advantage of the train.
- Some felt that there were too many route stops, and the speed of journey times could be improved.
- Aligned with other groups was a requirement for a rise in the overall quality of the train environment.

“The Cardiff buses can provide free Wi-Fi and that’s on a £2 ticket, so why on earth can’t the trains. It’s a disgrace?”
Business, Cardiff

“I think CrossCountry are far more polite and friendlier than any other service but they’re slower and less visible than they could be.”
Business, Leeds

The leisure user perspective

Leisure users are positive about CrossCountry, feeling that it combines good quality staff with an unassumingly reliable service.



- Overall the service is seen to be reliable and good value.
 - There is a consensus that CrossCountry doesn't stand out and offers a less 'showy' experience than other operators. However, in its own understated, slightly old fashioned way it is considered to provide a good service.
 - This passenger group are less affected by overcrowding as they tend have more time to plan journeys and reserve seats. As a result of this they are more likely to highlight that the carriages are nice, quiet and roomy, especially in comparison to other operators (Great Western Railway and South West Trains).
 - The on-board staff are also seen to provide a very good service, offering friendly and helpful advice when required.
-
- There was a consensus, shared with other user types, that improvements could be made to the catering as well as on-board facilities such as toilets and tables.
 - The biggest pain point for leisure users was the lack of luggage storage, especially at times of full or near to full train capacity.
 - Some other Leisure users also felt that there was a requirement for increased services during times of peak demand i.e. during Christmas or Sporting tournaments.
 - Services can also be seen as lengthy, with frequent stops and on some routes a lot of changes.

"They are pretty punctual, which is obviously the main point and I think they are comfortable, certainly more so than other modes of transport."

Leisure, Leicester

"To me CrossCountry always feels very homely and really comfortable."
Birmingham, Leisure

Choice of transport mode



Choice of transport mode – short to medium journeys

The benefits of using CrossCountry over other modes are mostly generic to rail



The train offers good value over short to medium journeys. Compared to the bus, coach and the private car over these distances, the cost, combined with other factors such as speed, predictability and convenience makes train travel very attractive.

"It's cheaper than a bus. The bus is £5.20 and it takes 45 minutes in rush hour traffic. Its £4.20 on the train and it takes six minutes, so, it's a bit of a no-brainer really."
Leicester, Leisure

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. Driving (and parking) is frequently described **as stressful and tiring** in comparison to the train.



"We've done road trips before and it always means that we either have to hire a car and all of us take responsibility or one person is driving for the whole holiday and it kind of puts a dampener on it. Whereas if you're on a train you generally have two seats and a table. It's quite relaxed and we can all have a glass of wine!"
Birmingham, Leisure



Notwithstanding the occasional mishap the train almost always wins in terms of both **speed and predictability** against cars, and buses on what is seen as an increasingly congested road system.

"It's convenience and speed for me. If I drive that's basically four hours wasted. My company would much prefer it if I take the train because then I don't waste half a day!" Leeds, Business



Driving (and parking) is frequently described **as stressful and tiring** in comparison to the train.

"It's far easier to go from South Wigston to Birmingham by train – far easier. You've got no worries about parking. It drops you off in the centre of Birmingham."
Leicester, Leisure



Choice of transport mode – medium to long journeys

For some long distance journeys, flying is a genuine alternative. Rail and plane are on a parity overall, with both performing well on different aspects. Coach travel, on the other hand, is rarely, if ever, considered.



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.) Airlines do, however, perform better than rail on various aspects of customer experience: seating, meal, recognition and rewards.



Overall, flying is seen as **more prone to severe delays or cancellations** than rail. In addition there are stress points around getting to and from the airport, arriving early, security checks. 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**.

"Rail prices have gone up recently, but the services are that good that you don't mind paying it really."
Leeds, Business

"Well the thing is checking in and you've got to wait around and you're always waiting at the gate. Whereas the train you just get right on and you're good to go."
Leeds, Business



For long distance travel, coach is **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.



Coach travel is typically much slower than rail and suffers from higher journey unpredictability. While there has been some improvement in recent years, the journey is mostly seen as something to be endured rather than enjoyed.

"Coaches are lot cheaper but often if I finish work on a Friday night and I want to go up to see some friends and maybe have a meal or drinks in the evening. If I get a coach I won't get there till very late. If I get a train I'll be up there in time to have dinner."
Exeter, Business/Commuter

"I wouldn't even consider the coach. Its far more comfortable and much quicker by train."
Leicester, Leisure

Versus other rail operators, CrossCountry is seen as a functional and reliable TOC



Passengers see cost, convenience and reliability as more important than company brand. And while CrossCountry doesn't benefit from the same brand profile of other TOCs, passengers associate it with offering a solid and reputable service.

"The customer service is pretty good on CrossCountry, they can be really witty on the tannoy, not unprofessional, but quite funny and everyone's in a good mood. With other train companies you have conductors going around like old fashioned school teachers."

Leeds, Business

CrossCountry is seen as offering a good value service.

"If you go CrossCountry, I automatically compare it to Virgin and it is not as slick. At the same time, in comparison to London Midland, it's superior. It's in that middle.

It's okay."

Birmingham, Leisure

Performs better than many other TOCs such as East Midlands, Great Western Railway and TransPennine Express on the following factors:

- Punctuality & reliability,
- train service frequency,
- network coverage,
- customer service.

Isn't able to offer the 'premium service of some TOCs on the following:

- Train carriage environment,
- crowding and lack of seating (on some routes),
- catering.

"There's a bit of theatre with some other train journeys, whereas CrossCountry is a train that just comes in and goes out..."


Leicester, Leisure

Relationship with CrossCountry

Passengers are open to having an enhanced relationship with CrossCountry



CrossCountry fulfils the basic requirements of a good service. Perceptions and associations of it are broadly positive and there is evidence of at least some brand affinity with CrossCountry. At the same time, there is a strong feeling that more could be being done to improve and enhance customer relationship.

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- An icon showing two stylized human figures in dark blue, one on the left and one on the right, shaking hands. The figure on the right has a white motion line behind their hand, suggesting a firm grip or agreement.
- **CrossCountry is viewed positively by many passengers.** It lacks the 'Intercity Express' experience of other TOCs. At the same time, its low profile network is seen as 'solid' and 'reliable'.
 - **Trust in CrossCountry is high.** Passenger experience of CrossCountry is positive in the main. It compares well with other modes of transport and train operators on key service requirements such as value, reliability and convenience.
 - **In addition, CrossCountry performs well on basic touchpoints of communication.** The on-board staff members **are helpful and friendly**, and queries and complaints are handled efficiently and fairly both on and off line.
 - As a result of this, most passengers are open to **an enhanced relationship** with CrossCountry. There is a desire to know who CrossCountry are and what they can offer.

As part of this enhanced relationship, respondents suggested more visible branding, higher profile staff and more proactive communication.



Understanding the CrossCountry brand

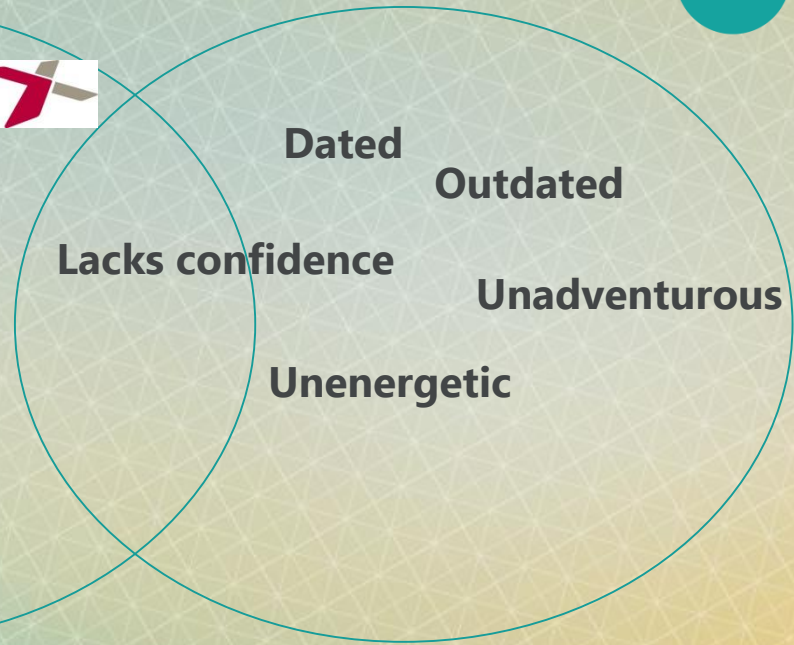
Many people have positive associations with CrossCountry, something linked to their experiences of receiving a good passenger service. At the same time, CrossCountry has a very low profile compared to many other competitor TOCs and people struggle to articulate an understanding of who the brand is and what it stands for.



Positive associations



Negative associations





CrossCountry relationship quotes

CrossCountry performs well on basic touchpoints of communication.

"The staff on the trains are lovely and very friendly."
Leicester, Leisure

Most passengers are open to an enhanced relationship with CrossCountry.

"Its functional, reliable and good value for money. But it doesn't give you much back. I would like more additional benefits and the opportunity to get some fare deals."
Leeds, Business

Trust in CrossCountry is also high.

"I trust CrossCountry to get me from A to B. They are a service that I know will do that in a punctual fashion."
Leeds, Business

CrossCountry is viewed positively by many passengers.

"I think that the service is very good. I genuinely like the CrossCountry service. I just think that it's lacking some impact."
Leeds, Leisure

But it has a very low profile.

"There's nothing that says this is a CrossCountry train, there's no perception, the railway carriage could be anyone's, so for me CrossCountry, just doesn't stand out."
Leicester, Leisure

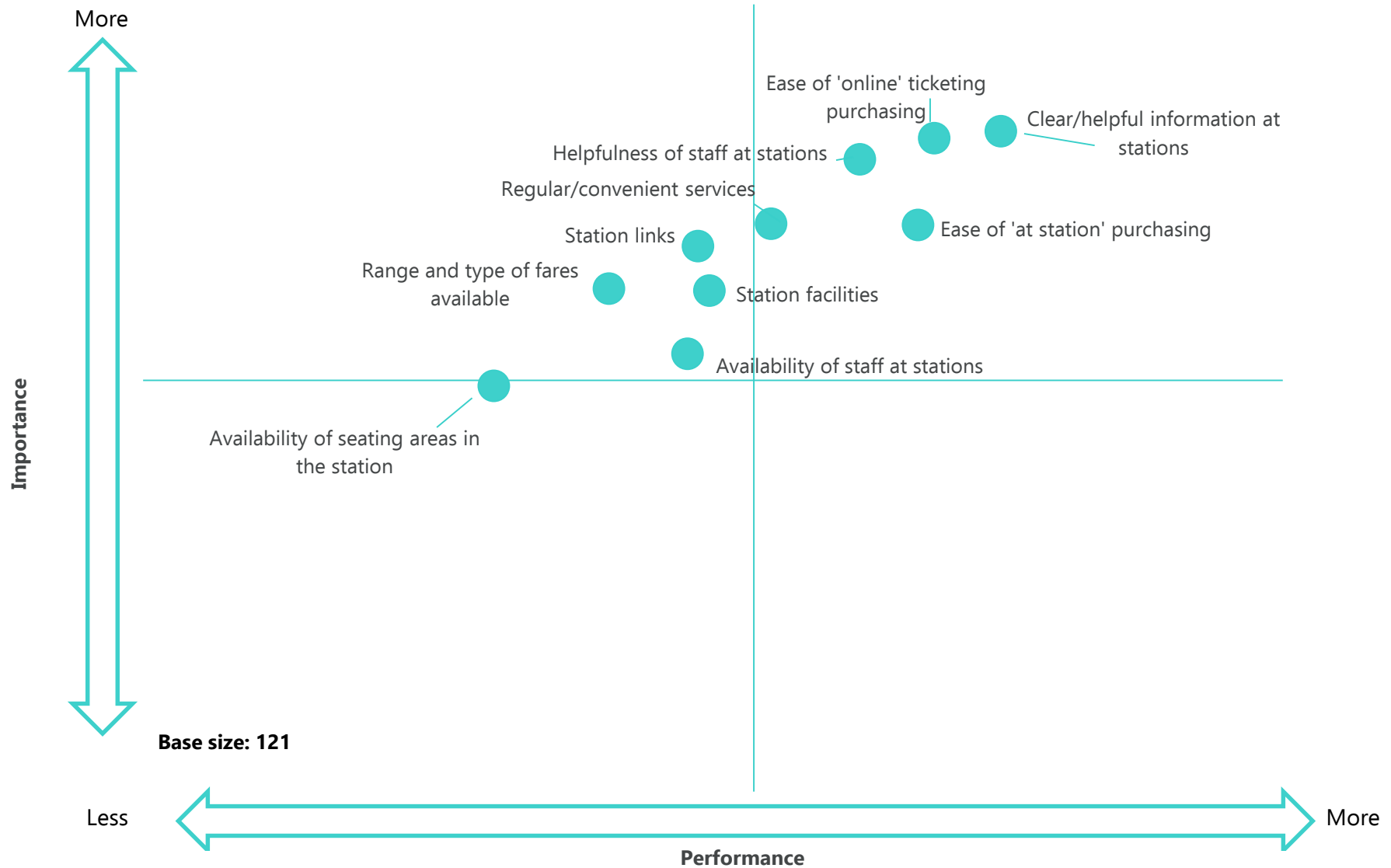
And some negative associations.

"It's a bit worn out looking. Kind of like the old-fashioned British Rail used to be."
Edinburgh, Leisure

The CrossCountry experience: Pre-board assessment




Pre-boarding matrix (self completion). Based on the performance/importance scores for passenger experience



Planning the journey: there were few if any problems encountered by passengers



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, the CrossCountry site, National Rail and the various aggregators such as 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) need for clearer pinpointing of cheap fares on websites, with the split ticketing website championed as the one website that was doing the most to promote customer fare value.

"It is very easy to book and plan journeys using the website. I type in the route and within seconds it comes up with every single route available and which is fantastic!"

Leeds, Business

"I think the website was bit clunky compared to others. But it was all there. You just had to sort of ferret around for it."

Leeds, Leisure

- Not a clear consensus on CrossCountry's own website; there are both advocates and critics.
- Many were very positive about the fact that it is very comprehensive and offers fares not only on CrossCountry but also with other operators and routes.
- In addition, it also gives users regular updates on rail services, such as disruptions due to flooding.
- More negatively, some felt that it was hard to navigate and 'clunky'.
- Others also felt it was very basic, especially in regard to 'add on services' around planning trips, not just the train journey.
- **Frequency/adequacy of timetables**, there was a need amongst Leisure users for an increased frequency of services during particular periods, i.e. Christmas or sports tournaments.
- In addition, commuters/business users wanted more direct services between major cities.

Few problems in terms of accessing information for journey planning



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



- There are some CrossCountry app users, typically more regular travellers and more likely to be somewhat younger (though not exclusively).
- There is no leading app in evident use; however the CrossCountry app was seen to work well and provide the right level of functionality and content.
- Apps were mostly used for planning and 'up to the minute' information, although one or two have also purchased tickets via an App.
- There was a requirement for the Apps to be more in sync with on platform communications.



- Some regular CrossCountry travellers also held up Twitter as a social media channel that CrossCountry performed well on for general information and help with journey planning.



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

"Sometimes you go on the app and the information is there and it tells you what platform you're going from, and sometimes you go on the platform and the train isn't there. So you end up going through all the boards, and you're rushing with your bags. So that could be a bit better."

Leeds, Leisure

"I use their social media quite a bit, mainly Twitter, they do help you if you have any problems and they are always there. I think it's a very good service."

Leeds, Business

Many stations were highlighted as having improved greatly over the last ten years



Birmingham New Street, Birmingham International and Leeds provide examples of stations where passengers felt that recent and ongoing investment had resulted in tangible benefits.



- Better quality and wider choice of retail and food & drink outlets:
 - Mainstream High St. brands (M&S, Boots, Sainsburys, Pret);
 - bars, restaurants and shops also provide pleasant entertainment outlets for people waiting at the station for any period of time,
 - CrossCountry services are easy to access and there is felt to be adequate signage and information – especially at hub stations.



- Having to pay for toilets and the lack of available seating annoys many people.
- Passengers feel that some big stations, such as Leicester, Coventry and Cardiff, have been left behind in the big improvement drive. These stations do not offer much in the way of modern facilities, and the variety and quality of retail outlets was felt to be poor.
- Overall there is a range of opinion on train staff at stations. Generally they are regarded as friendly and helpful (though not at all stations) but on the other hand, not very proactive.
- One thing of serious concern was how CrossCountry performed on staff visibility at stations. This is particularly acute at outlying stations where CrossCountry are the only provider and are thus seen as responsible by passengers. Leicestershire train stations (such as Narborough) were highlighted as examples of stations where passengers were unable to access information, struggled with ticket purchasing and experienced incidents of crime and vandalism.
- Overall, there was a requirement for a significant increase in the presence of CrossCountry staff at all stations across its network.

n.b: stations do not form part of the remit for CrossCountry, however they do play a big part in the overall customer experience



Many passengers find the array of ticket fares confusing and the fare structure opaque. The station experience of buying/collecting tickets is also not viewed positively.



- Many of the passengers in this study were booking in advance online.
- There was a general appreciation of the range of fares on offer and the relative ease of being able to get good value tickets.



- At the same time, many struggle to understand how best to apply the variable pricing principle to the best effect, and how to get the best deal.
 - Large price differences between similar journeys can seem arbitrary,
 - difficult to know if one has achieved the optimum price or what strategy one should adopt to do so.
- Some have had negative experiences of travelling on the wrong fare and there is a pervasive fear about not choosing the 'right' ticket.
- Some passengers at outlying and unstaffed stations, do not feel that they have access to the necessary fare information and purchasing machines. In extreme cases, they are unable to buy fares until they get to their destination station.
- In general, there are not felt to be enough ticket machines at stations. The queuing, especially at peak hours, is regarded as a particular pain point.

"Companies use complication to confuse people to sell more expensive tickets. It's the same with gas prices and electricity prices. there are probably about six, seven, eight different types of first class ticket going from £50 up to £250. It's the same seat going to the same place, it's just not necessary. It's complicated." Exeter, Leisure

Key pre-boarding priorities



Improvement priorities:

- Journey planning
 - Not a priority, but CrossCountry could perform better via more proactive communications and offers.
- Stations
 - More CrossCountry representation in the way of information desks/booths, or routine visitation to outlying 'unstaffed' stations.
- Ticketing and Fares
 - Greater transparency on ticket pricing; make the rules simpler and clearer,
 - more ticket machines for purchase and collection.

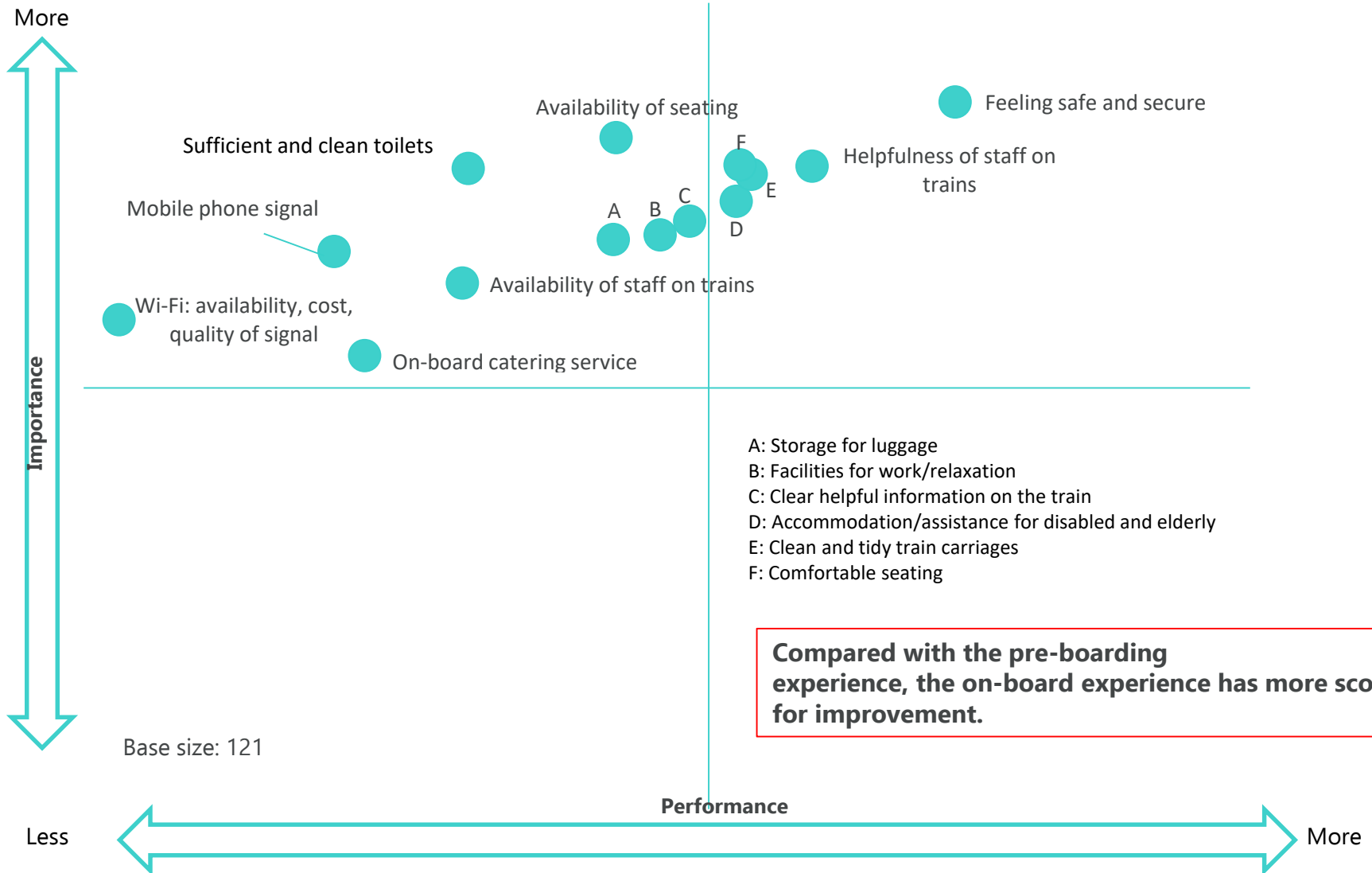
"I regularly travel from South Wigston to Cambridge, which is in exactly the other direction to Telford. The journey from South Wigston to Cambridge costs £35.70 and South Wigston to Telford, a very similar journey in terms of distance, is just £22.10."
Leicester, Leisure

"There are very few of them around. On an early morning, the station is quite an eerie place to be, no-one around, no staff. It would be great to have some more CrossCountry presence."
Exeter, Leisure

The CrossCountry experience: On train



On-board experience matrix (self-completion). Based on the performance/importance scores for passenger experience



The on-board experience is seen to be reasonable by passengers, but there are significant areas for improvement



- CrossCountry offers a punctual service with few, if any disruptions.
- Many passengers felt that CrossCountry provided a comfortable service for those passengers who are able to get a seat.
- Leisure passengers and business passengers travelling off-peak, tended to be the most positive about the train environment.



- There were some areas of the on-board experience that did require attention as a matter of priority:
 - The lack of availability of seating for crowded services,
 - the need for more staff on board,
 - the lack of free and good quality Wi-Fi signal - and to a lesser extent the mobile phone signal.
- Plus a range of secondary issues.

"I was travelling with my 70 year old mother in law, and not one person offered her a seat. You like to think that if a guard or someone was there they would say 'come on, get up, let this lady sit down!'"

Cardiff, Leisure

"My perception of the CrossCountry service is being less staffed pro rata than other long journey train services."

Leeds, Business



Key issues on board: availability of seating; availability of staff



- Lack of seating is seen to be a key issue with CrossCountry. There were a number of mentions by the participants (particularly commuters and some of the business users) of having to stand on overcrowded trains.
 - Impacts on feelings of service value, especially on trips over 30 minutes.
 - An underlying feeling that there should be more investment in the numbers of services and carriages.
 - Also a feeling that CrossCountry isn't planning enough, i.e. providing extra services for busy periods such as Christmas markets or sports tournaments.
- There was some understanding that not all of the overcrowding issues were the sole responsibility of CrossCountry. External factors were also mentioned such as:
 - Perceived lack of investment by National Rail,
 - expensive parking charges,
 - rapid population growth over the last 10 years, especially in and around major conurbations.



- Many passengers cited the lack of staff as also being a key issue, especially when combined with the overcrowded conditions highlighted above.
 - Impacted on feelings of personal security, especially when there were anti-social passengers around during match days or late at night, for example.
 - Critical in times when they are needed to mediate in certain scenarios - especially around seat reservations.

"There are times, with the crowding when more and more people are just squeezing on and I do think, there's going to be some big incident. It is worrying, especially if you've got kids with you, and there's no staff there to enforce anything."
Cardiff, Leisure

"If you don't get there 20 minutes before the train leaves you wouldn't get a seat. It would be absolutely rammed."
Leicester, Leisure



Key issues on board: Wi-Fi; mobile phone signal



- Good quality and free Wi-Fi is now offered by the majority of retail outlets and transport services.
- Passengers do not believe that they should have to pay at all.
- In many cases, even when they have paid for a service, the quality of the signal was found to be poor.
- Mobile phone signal, whilst not a priority factor, was regarded as something that could also be improved.

"It's the 21st century and Cardiff buses do it now for God's sake. I think its an insult the train is asking you to pay for Wi-Fi." Cardiff, Business

"If Wi-Fi was free I would be able to do a lot more work. And even when you do pay for it, it doesn't always work." Leeds, Business



Secondary issues on board: toilets, carriage environment



- Expectations of the on-board toilets by passengers are limited.
 - There is an acceptance by many people that the volumes of passengers using the trains renders maintaining a high state of cleanliness virtually impossible.
 - However, it was felt that better standards could be maintained.
- The smell in the toilets and corridors was also felt to be a serious problem.
 - Many felt that this could be rectified easily through an automatic air freshener service.

"It doesn't cost much money for air con, surely? And it really does smell. Every toilet I've been in just stinks."
Leicester, Leisure,

"The trains just look old, like they've seen better days. You get on other trains and they have leather seats...CrossCountry is scruffy and dated in comparison."
Cardiff, Leisure

- The overall carriage environment was seen to be a bit 'tatty' and in need of an update with many calling for renewed upholstery on the seats.
- The oversubscribed commuter services typically suffered from having dirtier carriages.
- Regular rubbish collection is seen as important and seems to be a feature on many, but not all, trains.

Secondary issues: seating, reservations, layout, tables and catering



- There were issues with the seating reservations, something seen as directly linked to overcrowding and staff availability.
- Many report a lack of 'policing' of reservations by staff leading to a number of occasions where people reserved seats but were unable to sit in them.

- It was felt that the seating areas in general could also do with an overhaul and a better planned layout. There was a requirement for more/larger tables so that people can work/eat and relax more comfortably on board.

- On-board catering / retail was not highly regarded.
 - Many people choose not to eat or drink anything on board.
 - The catering was seen as expensive and of poor quality.
 - In many cases, food trolleys were not accessible due to the overcrowded nature of the carriages.
- 1st Class food offer was seen to be 'OK' and equivalent to other train companies, but not as good as it could be.
 - Passengers felt that it offered few if any healthy options beyond occasional pieces of fruit.

"The food quality is substandard. It's not very healthy and there are so many products that, from a nutritional point of view, could be on that trolley." Leeds, Business

"The food has got to get better. I mean, I know they're using Starbucks quality coffee on some trains, but with CrossCountry it was just a cup and a bit of hot water." Birmingham, Leisure



Secondary issues: personal security, luggage storage



- There was some concern about personal safety, but again this is an issue primarily linked to the availability and visibility of on-board staff.
- There were few, if any, reported incidents, but the lack of staff leads to some feelings of insecurity.
 - Awareness of CCTV is limited.
 - Incidents of serious crime in the local area, train stations or on other public transport services such as buses, make passengers concerned.
 - There are serious question marks over whether there were enough on-board resources to contain anti-social or dangerous passengers.

"I was on the train and these three people got on. They'd had a bit to drink. The guard just chatted to them, didn't really ask them to calm down, but was actually engaging with them. It wasn't that I was scared but it was uncomfortable. I think she should have taken more control." Cardiff, Business

"I've got my Mac or iPad and one of them is going to be in my bag, which will end up at the end of the carriage. With all the people getting on and off the train I just sit there panicking that my bag won't be there when I get to Wakefield." Leeds, Business



- Lack of luggage space was highlighted as a problem, especially at critical times, such as the school holidays.
 - Overhead luggage areas were not felt to be deep or wide enough and space in the footwell or under seats was also seen as limited.
 - Many worried about having to stow luggage away from their seats/ out of sight.



Secondary issues: communications, disruption



- The majority of passengers were very pleased with the service reliability and punctuality, with few incidents of severe disruption reported.
- Generally, on-board communications were felt to be informative and friendly but could benefit from being a bit more accurate and frequent.

- The accuracy of information could be improved on CrossCountry through the provision of on-board screens that would give up to date arrival times and notification of delays.
- This would take some pressure off the staff, who though generally seen in a positive light, are sometimes little better informed than passengers themselves.
- There was some awareness of delay-repay rights (these examples were mainly highlighted on services with other TOCs).
- There were few if any examples of CrossCountry proactively advising customers on compensation (handing out forms etc.). That said, in the few incidents where they were approached they resolved the matter efficiently and satisfactorily.
- At the same time, there is room for empowered on-board staff to be doing more to ensure that any periods of disruption were handled in the best way possible.



"Once from Leeds to Birmingham, the train was an hour late and I kicked off. I expressed my views on Twitter and I got my money straight back from CrossCountry."
Leeds, Business

"I was delayed on the Birmingham line once for two hours, due to a signalling fault. The CrossCountry staff explained the reason for the delay and kept us all fully informed and updated throughout."
Leicester, Leisure

Passengers with disabilities



- There were few if any issues with assistance highlighted by disabled passengers.
- The experience of arriving at, and navigating the station is the most difficult part of the journey for passengers with disabilities.
- However, many found the behaviour of CrossCountry staff members commendable and felt that they removed any anxiety and discomfort from their journey.
- It was felt that the training and recruitment were of a high quality and this was reflected in their attitude towards disabled passengers.
- Many disabled passengers felt that this 'superior level of care' raised their relationship with CrossCountry above that of other rail service providers.

- On-board experiences are also generally good, the majority are able to get to reserved seats and staff members are on hand to ensure that reservations are handled comfortably.
- Unfortunately, there are aspects of the service that are beyond the immediate control of helpful and caring staff members. These include overcrowded and poorly maintained carriages and unpleasant toilets. All these factors impact negatively on the rail service experienced by disabled users.

"If they've seen I'm having a bad day they won't force the help on me and at the same time they'll not allow me to struggle. They seem to have individuals who've got a knack of understanding when someone needs help."

Leeds, Business

"The toilets are very filthy and smell and despite the fact that I book priority seats, because of my disability, I find that I'm always right next to them."

Newcastle, Business

CrossCountry 1st class experience offers an improvement on standard class but does not provide a premium service



- The key reason for going 1st Class for passengers is the guarantee of a seat on potentially overcrowded services.
- Aside from this, 1st Class only offers limited benefits over on Standard Class.
 - Seats are larger and more comfortable,
 - free tea/coffee and other light refreshments.



- Passengers feel that the 1st Class offer is limited when compared to other operators:
 - Slow staff service,
 - carriages seen to be outdated and untidy,
 - toilets are smelly and dirty,
 - not enough storage for luggage, laptops etc,
 - catering is limited and mediocre.
- There were incidents on busy trains where 1st Class passengers hadn't been able to reach their reserved seats.
 - These incidents cause a lot of frustration and calls for an overhaul of the ticket purchasing/reservation system .
 - At the same time, there is a resignation that the CrossCountry services have to cater to high passenger volumes and not much can be done in these situations.

Whilst passengers would appreciate some improvement to the service – there is a general recognition that the cost for 1st Class is fairly low, especially in comparison with other TOCs.

“That’s the reason I go first class, because I’ve had the experience of sitting on the floor. I’ve had the experience of fainting on the train because of the heat; I’m not going through that again.” Birmingham, Leisure

On board – key priorities



Improvement priorities - primary:

- Availability of seating
 - Passengers recommend an increase in services and more carriages during 'busy periods'.
- Availability of on-board staff
 - Passengers also recommend a greater presence of CrossCountry staff to deal with any on-board issues.
 - An increase in staff visibility would also improve customer relationships.
- Wi-Fi
 - The provision of free and plentiful Wi-Fi signal, and to a lesser extent mobile phone signal, is considered a basic customer requirement by many passengers.

Improvement priorities – secondary:

- Other on-board factors require some improvement:
 - Toilets: cleaner and less smelly,
 - carriage environment: newer and tidier,
 - seating reservations: better organised and better monitored by staff,
 - seating layout: more space provided,
 - tables: larger and better placed,
 - catering: more options provided at a better value,
 - personal security: greater staff visibility would impact on this,
 - luggage storage: larger, better placed storage.
- 1st Class
 - Passengers would appreciate a more 'premium' experience.

"I've been on trains where it's absolutely packed and there's a lot of people standing and what's really annoying is that sometimes you wish there was a member of staff coming up and down through the train when it's like that."

Leisure, Exeter

"Sometimes you can go in and depending who might have been in there, there's toilet paper left on the floor. I think if there was a couple of train staff on board, a guard could be checking things like that."

Leisure, Exeter

The CrossCountry experience: Value for money

Good value represents a balance between experiential factors combined with cost and length of the journey.



Over shorter distances and with lower fares, passengers will bear overcrowding and a lack of availability of facilities in return for speed, convenience and reliability. As distances and price increases they demand more from the CrossCountry service.

Experience of overall service quality

Good Value

"Punctuality great, reliability generally good. Could be cleaner, generally speaking. Housekeeping could be better, a few issues with overcrowding but it's a pretty good service."
Leicester, Leisure



"At the end of the day they get you from A to B and that's why you use them. Its faster than driving and nearly always on time. It doesn't excite you and you don't look forward to your next journey but they are doing what you need them to do."
Cardiff, Leisure

Journey cost

"When I'm booking business travel, there is a magic £ figure where I start to question the value – but that has never happened with CrossCountry."
Leeds, Business

"I do sometimes resent the £20 return ticket to York when I am pressed up against the carriage door for 25 minutes."
Leeds, Business

"There is a sense of injustice. If you've paid full price for a ticket and you're having to stand up you just think why am I standing? – I've paid the same as that other (seated) person!!"
Leicester, Leisure

Poor value

Journey time

CrossCountry performs well on value overall because it is able to offer a regular, punctual and convenient service at a reasonable cost. At the same time, aspects of the service such as overcrowding and poor facilities over increasing distances – especially in conjunction with any increase in cost - push some passengers into a 'poor value' mind-set.

Best value is achieved by those who are flexible with time and have alternative modes of transport to choose from



"My last rail trip to Edinburgh was quite cheap, because I booked it three weeks in advance."
Edinburgh, Business/Commuter

"Advanced tickets are a big factor for me because if I know when I'm going, I can get a ticket in advance a lot cheaper than paying on the day, I'm diligent about doing that."
Exeter, Leisure

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

Mostly highly satisfied: CrossCountry 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

Alternatives available

Lots

Choice of time

Quite satisfied: 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.

None

"Often I come on at 5:00pm, and you can't get a seat and after a long day you want to just sit down, so I do think that they are definitely overcrowded."
Exeter, Business/Commuter

"I go by train if there is a train. I was working in a charity shop down in Exmouth, it was cheaper by train than bus and quicker and nicer."
Exeter, Leisure

Value for money: recognition and reward



While CrossCountry's fares are mostly seen as value for money, many passengers complain that little is given back to the passenger to make them feel like a valued customer.

- In other environments, including travel (e.g. airlines) and retail, customer reward programmes are increasingly the norm.
- CrossCountry (and rail in general) seen as lagging behind.
- The Airline industry is held up as an example of how to reward regular passengers.



- 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,
 - help with ongoing journey – hotel discounts and trip advice.
- Key themes for any approach:
 - Worthwhile: a genuine benefit, not gimmick,
 - building an ongoing customer relationship with CrossCountry,
 - raising the brand profile through partnerships with hotel chains and entertainment venues.

"Everywhere else we shop these days you get a loyalty card, you get points, you get something back."
Edinburgh,
Business/Commuter

"I will travel 5 or 10 miles extra to use that brand. Just so I can get the points. People who travel for business on a regular basis – really buy into that sort of points culture."
Leeds, Business

CrossCountry franchise: Conclusions and recommendations

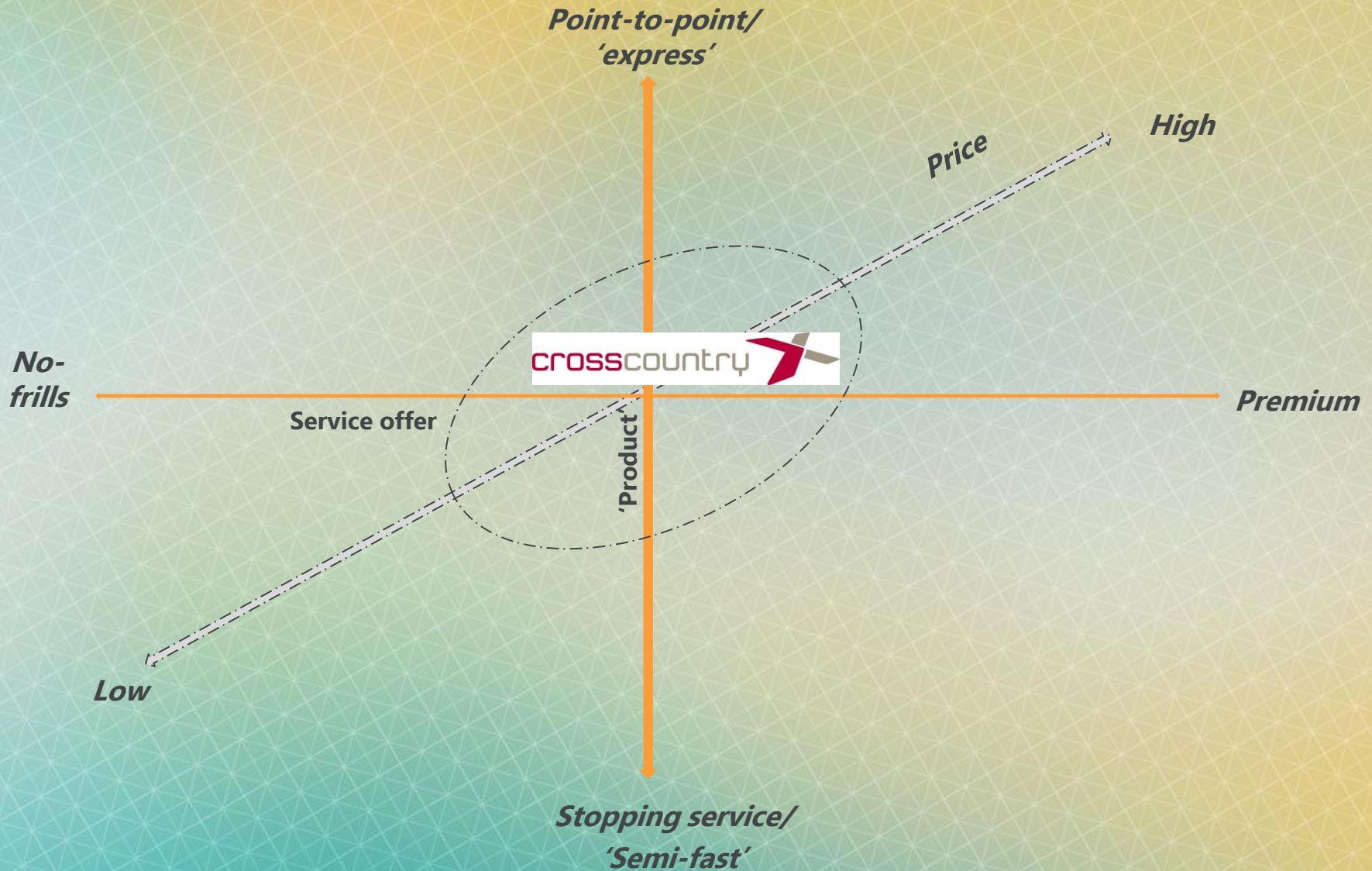
Summary: modest expectations but many areas where CrossCountry could do better and a need (and an opportunity) for a step change in terms of the customer relationship



- **Expectations of and aspirations for CrossCountry are relative modest.** The franchise performs well on the whole against passengers' core expectations.
- **CrossCountry seldom 'excites and delights'** in terms of the passenger experience and even 1st Class is seldom seen as a 'premium' offer, but equally, the experience is rarely a major disappointment.
- **To some extent, passengers' views of CrossCountry are a product of conditioning:** passengers are used to a 'middle of the road' experience and expect more of the same, if somewhat better.
- **But expectations are also a function of a rational price / value trade off:** passengers see CrossCountry as operating in a 'mid-market' space and as priced accordingly.
- That said, **there is still substantial room for improvement.**
- **Furthermore – and positively – there is a degree of (perhaps sometimes latent) warmth towards CrossCountry.** There is a feeling that CrossCountry could and should do more to 'tell its story' and build a relationship with customers.



Perceptions of CrossCountry's positioning





Improvement priorities focus on core day-to-day service elements

Issues needing immediate improvement:

- **Increased staff presence (both at stations and on board trains) to enhance feelings of safety and security, help resolve problems (e.g. seat reservations) and build relationship**
- **On-board priorities are for:**
 - Improved & free Wi-Fi and phone signal,
 - cleaner toilets,
 - more effective reservation system,
 - better catering (more choice and better quality),
 - a more differentiated 1st Class offer,
 - cleaner carriages / more frequent rubbish collection.

Longer term issues:

- **Address capacity and service frequency issues**
 - More choice of express / non-stopping services?,
 - managing peaks (times, route bottlenecks, special or seasonal events).
- **Enhanced train design**
 - More (and more secure) luggage storage,
 - more / larger tables,
 - generally refreshed and refurbished.
- **More 'rational' ticketing**
 - Greater transparency and clearer 'rules.'



Building an enhanced relationship

- **Beyond day-to-day service issues there is the opportunity for CrossCountry to build an enhanced relationship with passengers.**
- **Passengers are, for the most part, open to (and see the need for) CrossCountry having a higher profile and 'setting out its stall' to customers.**
- **Addressing current service shortfalls will build on what is already a mostly good service and gives CrossCountry permission to start the conversation.**
- **Key initiatives to consider include:**
 - More visibility of the brand at key touchpoints (online, stations, on board and via staff),
 - more proactive, outbound communication (with messages that are both practical (e.g. service problems, how to get the right ticket) as well as 'telling the CrossCountry story',
 - demonstrating that customers are valued through rewarding loyalty, deals and special offers.