

A Vision for High Speed Rail

Topline Debrief to Greengauge21

The
**Leading
Edge**



Agenda

Background and Objectives

Research Headlines

The Way Forward

BACKGROUND AND OBJECTIVES

Research Headlines

The Way Forward

Background

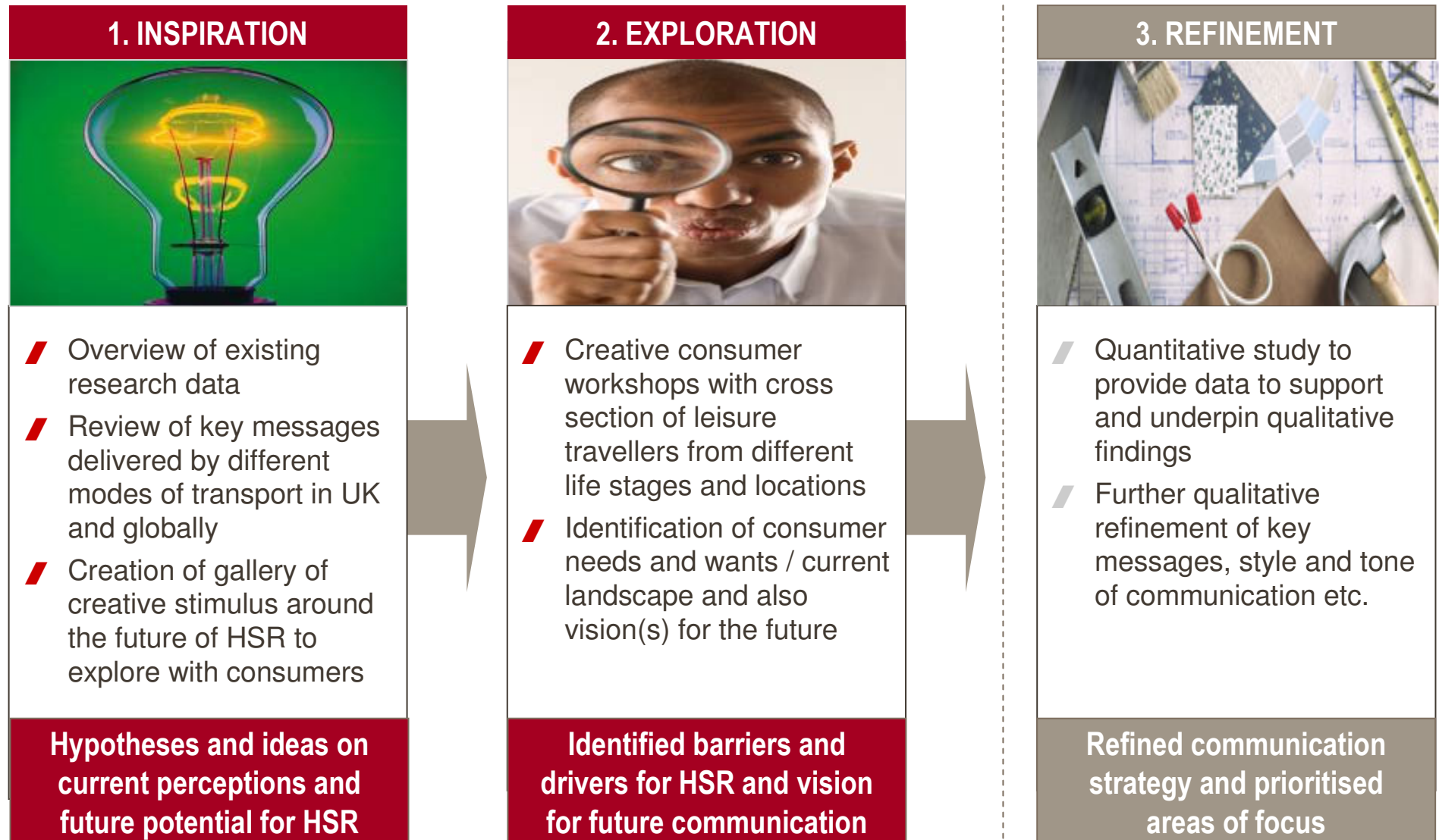
- // The UK's first high-speed railway, 'High Speed 1', linking the Channel Tunnel with London St Pancras opened fully in November 2007. Eurostar trains from London to Paris and Brussels currently operate over HS1 and later this year, domestic 'Javelin' services will operate from Kent into London.
- // High Speed rail is normally taken to refer to rail services that operate at around 300-350 km/hour. New trains, tracks and infrastructures are built for HSR services. Such services are focused on the inter-city market, serving long-distance journeys with relatively few station stops.
- // High speed rail services are operated in a number of countries worldwide, including Japan (Shinkansen), France (TGV) and Germany (ICE). HSR lines are often constructed in order to expand the capacity of the rail network, but wider economic and environmental benefits are also important, particularly where significant switch from car or air travel can be secured through a substantial reduction in journey times.
- // Little consumer research has been carried out in the UK specifically on high-speed rail. Research carried out has generally been with users of current rail rather than with non-users
- // As such, Greengauge 21 now wish to undertake some qualitative research to build some solid foundations to underpin insights as a springboard to future idea generation.
- // This document presents an initial overview of how The Leading Edge would meet this challenge

To identify what UK consumers want from future high speed rail (HSR)services- what features will encourage them to choose high-speed rail over other modes of transport or over not travelling at all

The outcomes of the research will be used:

- /// To ensure the important consumer issues are incorporated where appropriate into the planning of HSR infrastructure and services, alongside factors conventionally modelled such as journey times, service frequency and fares
- /// To identify the key messages and issues that would need to be addressed for the 'person in the street' to give strong support to HSR

Research Approach



Who we spoke to

Nucleus Workshop-London	Workshop 1-Leeds	Workshop 2-Glasgow	Workshop 3-London
Pre-Family	Family	Empty Nesters	Business Travellers
Aged 18-30	Aged 30-50	Aged 55-70	Aged 30-60
BC1C2D	BC1C2D	BC1C2D	ABC1C2
Mix of male and female	Mix of male and female	Mix of male and female	Mix of male and female

Key criteria:

- 2.5 hr workshops (7 respondents in each), with the exception of the Business Travellers' Group being 1.5hrs with 5 respondents.
- All to be regular long distance (over 75 miles) travellers and to have completed a journey in the last 3 months
- All respondents to be non rejecters of taking rail or confined to one mode of transport from home
- All to have the ability to drive, and will use road as a mode of transport on occasions
- All to be creative and articulate
- The Nucleus group consisted of 4 respondents that had travelled from different parts of the country (Bristol, Manchester, Edinburgh, Leeds) to the workshop in Central London using a variety of modes of travel (e.g. 2 x rail, 1x coach, 1x air). The other 3 were Londoners who were regular long distance leisure travelers
- All were pre-tasked with completing a Travel Journal to bring their experiences to light.

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The Way Forward

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RESEARCH HEADLINES - THE CONSUMER PERSPECTIVE

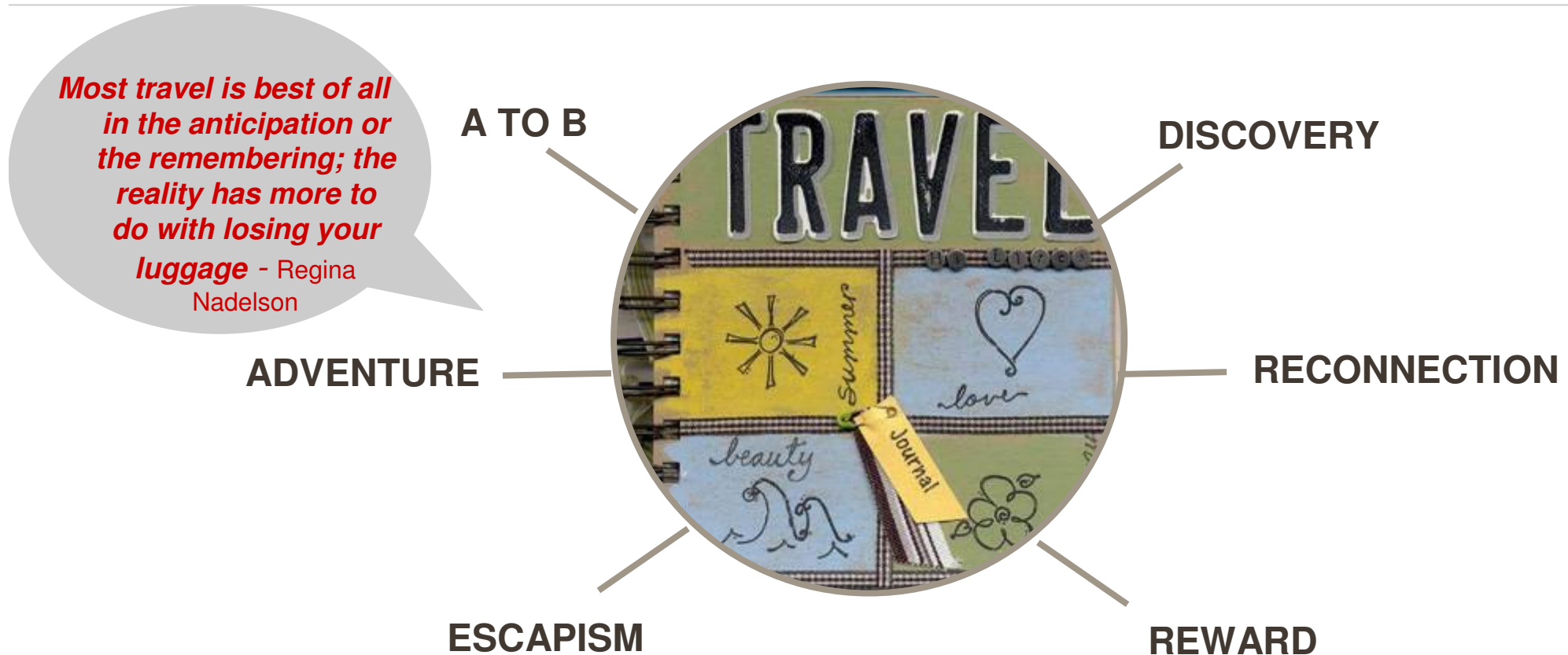
- MODES OF TRAVEL TODAY

- *Key Choice Drivers*

- *Moments of Truth*

- *Target Differences*

The Significance of Travel



TRAVEL PLAYS A SIGNIFICANT ROLE IN PEOPLE'S LIVES IN MULTIPLE WAYS EVEN WHERE DOMESTIC TRAVEL IS CONCERNED. HOWEVER, THE FOCUS CURRENTLY IS MORE ON 'GETTING THERE' RATHER THAN THE JOURNEY ITSELF WHICH SEEMS TO HAVE GOT LOST IN THE SEARCH FOR 'THE NEED FOR SPEED' AND DESIRE TO BLANK OUT EXISTING TRAVEL FRUSTRATIONS.

Rail Travel

The
Leading
Angle

PROS

freedom to move about
safe
fast vs driving
comfortable in 1st class
great for city centre
relaxing
get to see the scenery
entertaining for kids
smooth ride
sociable
Virgin changing experiences
fairly reliable



CONS

fear of lost luggage
annoying mobile phones / music of others
limited network
lack of luggage space
delays and cancellations
no nice waiting areas
Bad food
smelly toilets
EXPENSIVE
restricted time schedule
unclear signage of connections
you're either too hot or too cold

Rail Travel

WHAT PEOPLE HAD TO SAY...

PRE-FAMILY	LEISURE TRAVELERS	BUSINESS TRAVELERS
 <p><i>"The long distance trains are pretty fast anyway, they've definitely speeded up"</i></p> <p><i>"If you want to get from anywhere to London its often easier and more direct to get the train"</i></p> <p><i>"I am always surprised by the high cost of train travel... you get penalized if you don't book ages in advance"</i></p> <p><i>"The express trains are very much like flying"</i></p>	 <p><i>"On the train you can move about, stretch your legs... you can keep the kids busy and it's an adventure for them" - Family</i></p> <p><i>"It takes the stress out of travel... its comfortable and as long as you've planned your route its easy. You don't really have to think or deal with screaming kids in the back of the car" – Family</i></p> <p><i>"I'd really rather not drive as its too tiring and stressful but if we are off hill-walking in the North of Scotland you don't have the choice of taking the train" – Empty Nester</i></p>	 <p><i>"It allows you to enjoy and make the most of the journey because there are few disruptions and it's generally a smooth ride"</i></p> <p><i>"It's a great way of being able to use the travel time constructively, but the cost is exorbitant, especially if you have to travel last minute"</i></p> <p><i>"When you have multiple stops to make en route it makes far more sense to use the car"</i></p>

THE ABILITY TO RELAX AND OPTIMIZE TRAVEL TIME AS WELL AS ARRIVING CITY CENTRE ARE KEY ELEMENTS OF APPEAL OF RAIL TRAVEL. COST AND RESTRICTIVE TIME SCHEDULES ARE THE GREATEST BARRIERS TO MORE REGULAR TRAIN TRAVEL


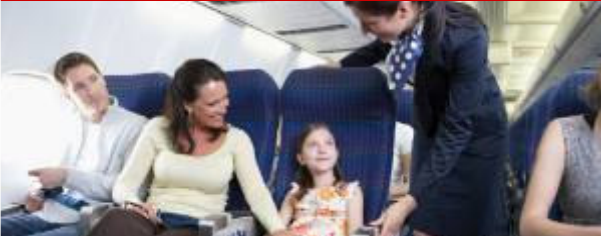

Air Travel

The
Leading
Angle



Air Travel

WHAT PEOPLE HAD TO SAY...

PRE-FAMILY	LEISURE TRAVELERS	BUSINESS TRAVELERS
 <p><i>“Flying is a bit more major, like when you are going on holiday”</i></p> <p><i>“Had to get up a lot earlier and take time to check in etc”</i></p> <p><i>“As soon as you’re at the airport, that’s it you’re on your way”</i></p> <p><i>“It’s easier to fly to the South West, but to get to London, train’s got to be best”</i></p>	 <p><i>“Still feels like a bit of a luxury” - Family</i></p> <p><i>“Often cheaper than the train if there are four of you travelling... you get some excellent deals” – Family</i></p> <p><i>“Flying is not really us anymore because of all the hassle involved getting to the airport and then walking miles to the gates, but for longer routes it’s the only way if you want to get there quickly” – Empty Nester</i></p>	 <p><i>“Flying is purely to get there faster... there are plenty of reasons not to fly such as safety and all the waiting around but for the longer distance it is the only way to get there fast”</i></p> <p><i>“Flying is not what it used to be but the likes of BA still give you a sense of being valued as a customer, unlike the budget ones – cheap but feel like cattle”</i></p>

STILL A SENSE OF LUXURY AND HOLIDAY-FEEL ASSOCIATED EVEN WITH DOMESTIC FLIGHTS. SPEED AND LOW COST DEALS ARE KEY TO APPEAL BUT INCREASING RESTRICTIONS ON LUGGAGE AND WAITING TIME ARE PROVING OFF-PUTTING TO SOME.

Coach Travel

PROS

for retirees

fun in a group

guaranteed seat

very cheap

links to hotel and event deals

for students

good pit stops en route

good for city centre travel



CONS

lack of privacy

slow

fear of accidents

poor driver skills

dodgy travellers

lack of space

limited facilities




tiny, dirty toilets

no mobility

shabby, worn interiors

Coach Travel

WHAT PEOPLE HAD TO SAY...

PRE-FAMILY	LEISURE TRAVELERS	BUSINESS TRAVELERS
		
<p><i>“I find coaches a bit scary... its not like a pilot who is well qualified, he’s just a bus driver and you are still on the motorway and you hear about crashes quite often”</i></p> <p><i>“Only good if you have lots of time and no money”</i></p>	<p><i>“I’m not too keen on the people who tend to travel by coach, bit dirty and smelly usually” – Family</i></p> <p><i>“It would be a nightmare with kids, you’re strapped in for long periods of time with nothing to do” – Family</i></p> <p><i>“Good price wise and if you choose the right time to travel can be quite pleasant if you’re not going too far” – Empty-nester</i></p>	<p><i>“Very claustrophobic and you’re all squashed in with very little personal space”</i></p> <p><i>“It’s for students and OAPs”</i></p>

COACH TRAVEL IS GENERALLY DOWN-GRADED TO BE ‘FOR THOSE WITH LOTS OF TIME AND NO MONEY’. RESTRICTIVE IN TERMS OF MOBILITY, TIMING AND FACILITIES IT BECOMES LAST CHOICE OR DOESN’T EVEN ENTER MOST PEOPLE’S CONSIDERATION SET UNLESS LINKED TO HOLIDAY TOURS OR NEED TO GO ‘ON THE CHEAP’

Car Travel

PROS

best for short
journeys

freedom

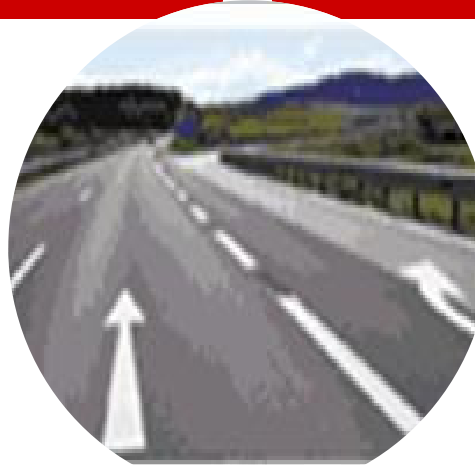
in control

door-to-door

can take lots of luggage

**personalised
space**

cheaper if more
travellers



CONS

moron drivers

**speed
cameras**

parking stress and
cost

**tiring,
stressful**

congestion charge (London)

**delays – traffic
jams, road works**

fear of accidents/
break-downs

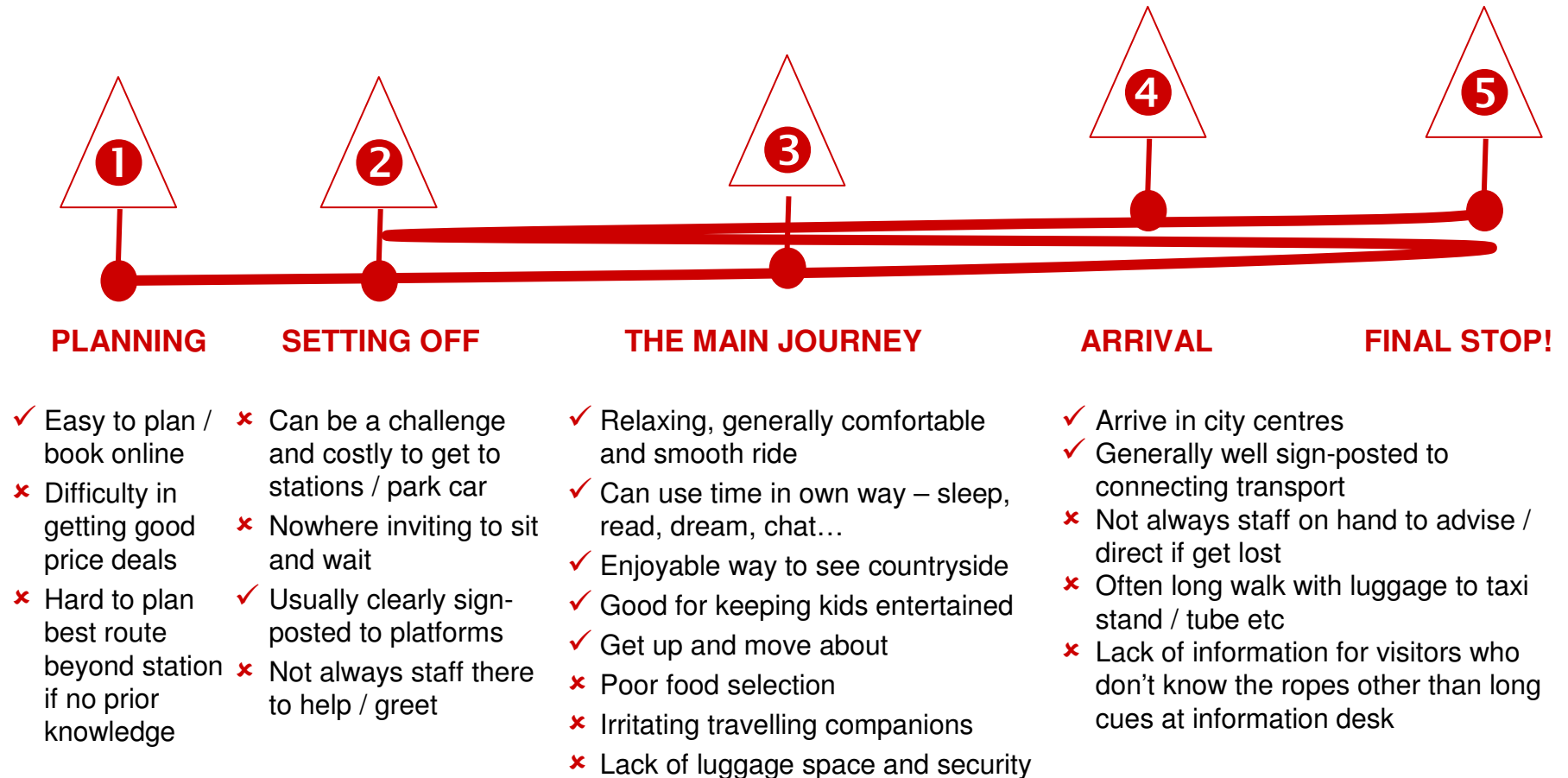
Car Travel

WHAT PEOPLE HAD TO SAY...

PRE-FAMILY	LEISURE TRAVELERS	BUSINESS TRAVELERS
		
<p><i>“Apart from petrol I don’t see driving a car as an expense”</i></p> <p><i>“It’s great when you can set off and have a great laugh with the gals in the car. You can put your music on and stop when you feel like it”</i></p> <p><i>“Traffic is a nightmare these days, you can’t get anywhere fast”</i></p>	<p><i>“Driving can be really stressful with screaming kids in the back and you tend to arrive knackered from all the concentration” – Family</i></p> <p><i>“With the car, we just load it up with all our walking gear and leave when we want to and stop off at places of interest on route” – Empty Nester</i></p> <p><i>“Your car is your domain... it’s your space, your rubbish, you don’t have to put up with other people or worry about others getting harassed by your kids!” - Family</i></p>	<p><i>“It gives you the ultimate flexibility, particularly if you need to go to different destinations in a day... that just wouldn’t be possible on the train”</i></p> <p><i>“You plan your own route and with Sat Nav these days it has reduced the stress and anxiety about getting lost and gives you alternative routes in case of jams”</i></p> <p><i>“If you don’t use the roads at the right times you get snarled up in traffic and that can add a lot of frustrating and tiring hours to your journey”</i></p>

ULTIMATE CONTROL AND COMFORT BUT DRIVING PROVES TO BE HIGHLY STRESSFUL AND NOT A PRIMARY OPTION OVER LONG DISTANCES UNLESS MULTIPLE STOPS EN ROUTE ARE PLANNED

When Rail Travel does and doesn't have The Edge



THE KEY ADVANTAGES OF TRAIN TRAVEL APPEARS TO BE THE JOURNEY ITSELF WHICH OFFERS FAR GREATER POSSIBILITIES OF OPTIMIZING TIME AND ARRIVING IN CITY-CENTRES. FAIRER COST STRUCTURES AND ABILITY TO BOOK ONWARD TRAVEL WOULD SIGNIFICANTLY HIGHTEN APPEAL OVER OTHER FORMS OF TRANSPORT.

Headlines : Modes of Travel today

Train travel seems to have the edge in terms of the journey itself as a great way to optimize travel time and enjoy a greater connection to the outside world. However, cost, restrictions of time schedules and the limited reach of rail networks are main barriers to more frequent train travel for many.

Despite recent issues and a general despondency about Britain's rail service, general consensus is that trains have improved on the long distance journeys – faster and more comfortable with easier on-line booking facilities.

And Virgin in particular have had a notable influence on changing people's perceptions of what they can expect of train travel nowadays long distance journeys – better service, more facilities etc

Technology generally has changed the nature of domestic travel with more comparison websites available to scour for good deals, quick check-ins on-line for flights and Sat Navs for cars all taking some of the stress and anxiety out of the travel experience.

Coach travel comes into its own for students and OAPs but otherwise generally disregarded as uncomfortable and inconvenient

Car travel although presenting the ultimate in flexibility is becoming increasingly frustrating in view of congestion, road-works and speed cameras which all impair the journey experience

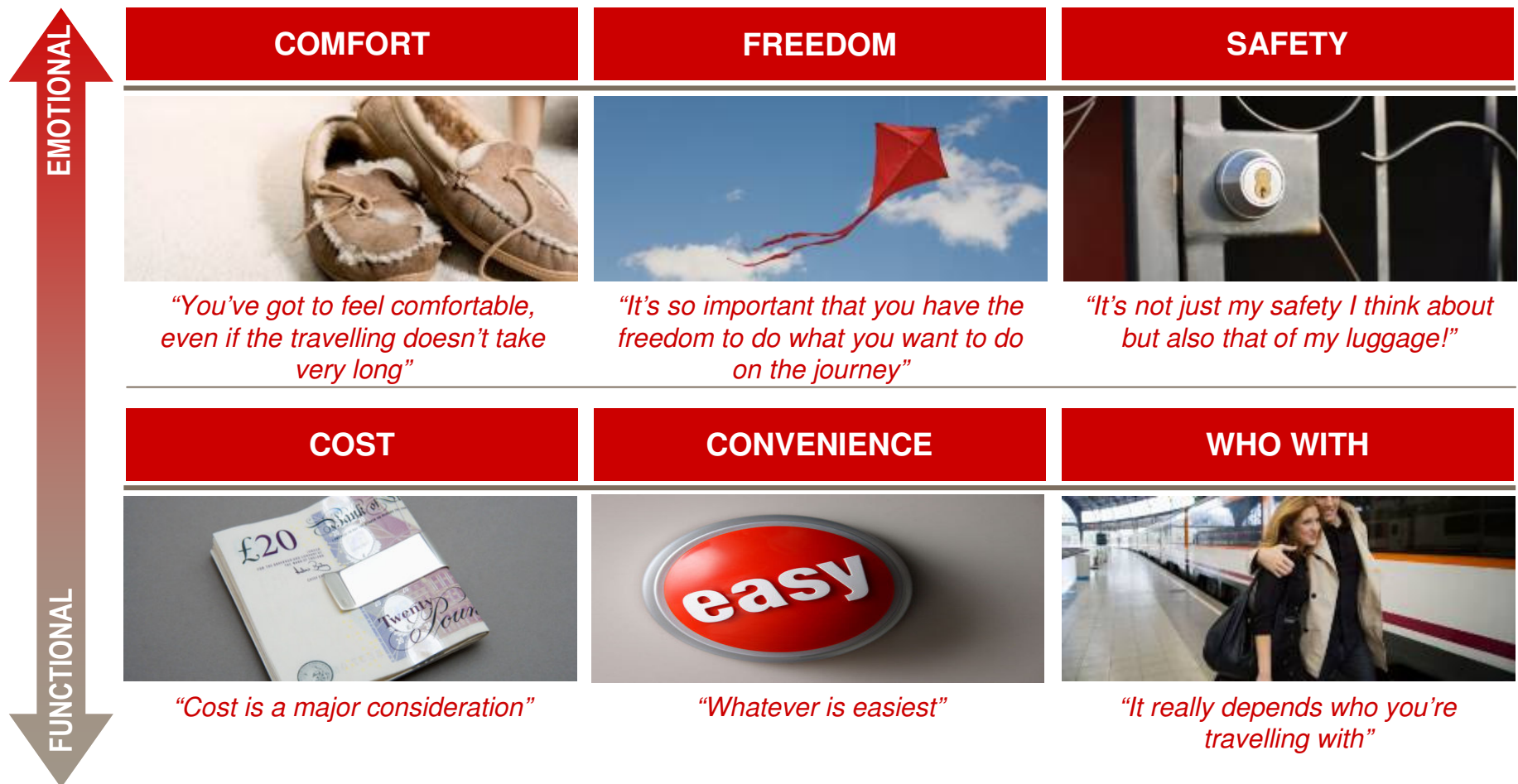
Air travel still has sense of glamour associated with it and is proving its worth in terms of low cost but increasing restrictions and waiting times is losing some of its shine!



RESEARCH HEADLINES - THE CONSUMER PERSPECTIVE

- *Modes of Travel Today*
- **KEY CHOICE DRIVERS**
- *Moments of Truth*
- *Target Differences*

Key Choice Drivers



FUNCTIONAL AND EMOTIONAL DRIVERS ARE NATURALLY INTERCONNECTED, BUT FUNCTIONAL CONSIDERATIONS ULTIMATELY TAKE PRECEDENCE IN TRADE-OFF DECISION-MAKING



Choice Drivers : **COST**

- /// Main journey plus connections – *“You need to look at the total cost, not just the cost of the flight or the train but all the connections you have to take to get there and to where you want to go the other end”*
- /// Relative to length of journey – *“I thought the train was very expensive for a 2 hour journey”*
- /// Split by number of people travelling – *“If there’s more than one of you travelling, I would tend to drive as its cheaper”*
- /// Last minute vs early bird – *“I couldn’t believe the price difference if you book in advance rather than on the day... but I don’t want to plan a weekend away a month in advance or be forced to take a certain train”*

COST IS A FUNDAMENTAL CONSIDERATION FOR ALL EXCEPT MOST BUSINESS TRAVELLERS. TRAIN TRAVEL IS DEEMED EXPENSIVE SO UNLESS BOOKING WITH CONSIDERABLE ADVANCE, THIS BECOMES A MAJOR BARRIER TO CONSIDERATION FOR LEISURE TRAVELLERS.



Choice Drivers : CONVENIENCE

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- // Ease of booking – on-line preferred (some minor concerns re. security)
- // Ease of getting to point of departure - *“It takes me an age to get to the airport so I’d never even consider flying”*
- // Travel on a Sunday – *“Trying to get anywhere on a train on a Sunday is a major feat”*
- // Flexibility of out-bound and in-bound travel times – *“I don’t want to have to hang around because I’m booked on a certain train”, “You seem to get penalized for wanting to go last minute”*
- // Luggage issue – *“Sometimes you have too much to carry to go on the train, so you have to go by car”*
- // Connections – how many changes and at which station need to change are equally critical – *“I’d always look at how many changes I’m going to have to make to get there, because this increases hassle and also likelihood of things to go wrong... I’d never go if I had to change at Manchester for example because it is a massive station and very confusing”*

ENSURING EASE OF JOURNEY IS A CRITICAL ISSUE PARTICULARLY FOR FAMILIES AND EMPTY-NESTERS SEEKING TO MINIMIZE ANY RISK OF THINGS GOING WRONG



Choice Drivers : WHO WITH

- /// Number of people travelling – *“If there’s more than two of you then if it’s a 2-3hr journey then you’d be more likely to take the car, then it becomes a lot cheaper and easier to accommodate everyone’s needs” (Pre-family)*
- /// Mobility of those travelling - *“My wife has difficulty in getting around now without a wheel-chair so for us its easier either by plane for longer distances or car, if not it’s a real struggle to get on and off the train” (Empty Nester)*
- /// Kids or no kids – *“For longer journeys anything but the car with screaming, fighting kids in the back. The train is great for making the journey more entertaining and they don’t feel so constrained so are so whingey” (Family)*

TRAVELLING COMPANIONS PROMPT DIFFERENT CONSIDERATION CRITERIA AS THE ULTIMATE OBJECTIVES IS TO KEEP THE JOURNEY AS AFFORDABLE AND COMFORTABLE AS POSSIBLE FOR ALL CONCERNED.



Choice Drivers : **EMOTIONAL FACTORS**

The **Leading**
Angle

/// Comfort = both physical and psychological

- *“In order to be able to relax on the journey you want to feel comfortable ... as in comfortable in your seat and also having faith that the journey will work out fine” – (Family)*

/// Freedom = unrestricted travel times and destinations and ability to move about /stop off en route

- *“I really hate the feeling that I’m stuck somewhere and can’t get back just because I’m booked on a specific train” (Pre-family)*
- *“The chance to stretch your legs and move about on a train makes a real difference to when you’re flying” (Businessman)*

/// Safety = of self and of luggage

- *“I think that trains are pretty safe, you never really hear of any accidents” (Pre-family)*
- *“I really don’t like the thought of having to stow away my luggage right at the other end of the carriage, my niece got all her bags stolen once” (Empty-nester)*

EMOTIONAL FACTORS INTRINSICALLY LINKED TO THE ENJOYMENT OF THE JOURNEY AND DESIRE TO REPEAT THE EXPERIENCE.

Target Differences : What Matters Most Changes



- /// Cost is paramount
- /// Quickest route ideal but will compromise in view of cost
- /// Shared enjoyment of mode of travel high priority
- /// More sanguine about delays / cancellations – can sort themselves out



- /// Cost is key consideration but will pay more for greater ease and convenience
- /// Kids critical to decision-making as keeping them happy / entertained vital to reducing stress factor
- /// Greater focus on everything working to plan – seek more assistance with planning and logistics of travel



- /// Cost important but ease of travel more so as more able to travel off-peak / use OAP status for cheaper prices
- /// More nervous about things not going to plan – don't feel as confident or resilient to cope with alterations / delays
- /// More concerned about security of luggage and ability to get connections easily

PRIORITIES APPEAR TO CHANGE WITH LIFE-STAGE IN VIEW OF THE TRAVELERS PERCEPTION OF HOW WELL EQUIPPED THEY ARE TO DEAL WITH DIFFERENT TRAVEL CHALLENGES. THE OLDER YOU GET THE MORE CONCERNED WITH PRE-PLANNING AND SAFETY YOU ARE AS A MEANS OF TRYING TO CONTROL EVENTS AS MUCH AS POSSIBLE.

Headlines : Choice Drivers

- Choice drivers are a combination of functional and emotional considerations but when it comes to decision crunch-time, cost and convenience become the critical consideration criteria
- Modes of transport that offer a sense of flexibility, freedom and value for money relative to number of travellers and distance travelled will have greatest pulling power.
- Interestingly, Environmental considerations were rarely mentioned spontaneously as choice drivers, although discussed more amongst pre-family group as having impact on mode of transport. For the other groups it was felt to be almost be expected that transportation would have to become more environmentally-friendly in the future in view of legislation and the impact on the planet.
- Expectations are that it will grow in importance for all targets over next 5-10yrs as evidence of environmental impact of travel becomes more evident / more discussed



LOOKING TO THE FUTURE

- **Consumer Understanding of HSR**
- **Reactions to Facts & Figures**
- **Creation of the Ideal HSR Offer**



LOOKING TO THE FUTURE

- **Consumer Understanding of HSR**
- *Reactions to Facts & Figures*
- *Creation of the Ideal HSR Offer*

HSR : What is it? Initial thoughts?



HSR : Consumer Understanding

- // General confusion over what HSR is ... most immediately associate with Eurostar, TGV and Bullet Train (Japan)
- // Immediate associations focus on non-stop, express service between major cities.
 - Interestingly, general perception is that most inter-city (express / direct) trains are already pretty fast
- // Key target expectations are for holiday travellers and business people
- // Consensus that would need a BIG investment to make it work in UK in view of antiquated rail network and scepticism that Britain is up to the job!
- // Fear of knock-on cost to traveller – expectations of high price tag so this could limit appeal to all but business / up-market travellers

"I think 5 hours to Glasgow is quite good but I would pay a premium if I could get there faster" Pre-family

"The one I travelled on today tilted as it went round corners... I wasn't expecting that, so it was quite exciting and shows you they are designed for speed" Pre-family

"You would need a hell of a lot of money to make it work well and update our current network" Pre-family

"They'd really need to get some experts in from overseas to make sure it's done properly and ensure whoever is going to run it won't run it into the ground" Businesswoman

"I can't believe we could do it in the UK, Germans have the engineering expertise, we don't" Pre-family

"It sounds a bit special, like you'd be travelling first class" - Family

"I'm not sure what they mean by High Speed Rail... it sounds futuristic but other countries are already doing something similar aren't they" – Empty-Nester

"It would be like the concorde of rail travel" – Empty-Nester

CLEAR NEED FOR EDUCATION OF WHAT HSR IS AND VFM BENEFITS TO TRAVELLER. ADDITIONAL POSITIVE PR NEEDED AROUND BRITAIN'S ABILITY TO DELIVER ON BOTH THE TECHNOLOGICAL AND SERVICE ASPECTS TO ADDRESS LATENT CREDIBILITY ISSUES

HSR : Experiences to Date

- /
 Mainly Eurostar and very positive:
 - Bit of mystique / magic
 - Excitement of travelling through a tunnel to another country and being in the centre of Paris in 2hrs
 - Feat of engineering re. tunnel, tracks and speed of trains
 - Comfortable and luxurious – more like airline seats
 - Staff are professional and well-dressed
 - *“They wear nice uniforms and talk nicely, you get the sense they actually like their job”*
 - Quieter, more spacious than normal trains
- /
 For a few, some negatives and sense that Eurostar is getting a bit jaded now
 - A bit claustrophobic through tunnel
 - No real sense of differentiation except being faster
 - Expensive compared to flying unless book well in advance!
- /
 Others compare with Pendolino experience
 - Fast service from Glasgow to London – time is pretty impressive
- /
 Very little other European rail experience, but for those who have focus of recollection is on:
 - Efficiency of service and connections
 - Cheap price of tickets vs. UK prices



EUROSTAR IS THE BENCHMARK FOR HSR TO DATE FOR MAJORITY, ALTHOUGH FELT WILL BE OUT-DATED BY 2020. HSR APPEAL SEEMS TO BE FOCUSED ON FUSION OF HIGH TECH WITH A TOUCH OF MAGIC.



LOOKING TO THE FUTURE

- *Consumer Understanding of HSR*
- **Reactions to Facts & Figures**
- *Creation of the Ideal HSR Offer*

HSR : Reactions to Facts and Figures

- / Generally very positive response but immediate cost concerns
 - Both to the traveller and to the nation
- / Reduced duration of travel time is key hook rather than the speed of the train
 - But some do question if reduction in time is really worth all the investment and expected extra cost
- / Questions over need for and delay in building new track network
 - General scepticism amongst many, even younger that will be built in their life-times
- / Sceptical re. location of stations – no room for a separate one in many city centres and annexed ones will come at significant cost (eg: St Pancras)
- / Desire for a much closer link into the European network to make it worth its while
 - Some expectation that trains might go straight through tunnel into Europe without the need to change trains

"Sounds amazing but very expensive" Pre-family

"Do Manchester and Bristol really need a high speed rail... I'm happy with the travel time now and wouldn't want to pay much more"
Pre-family

"That is a significant saving on your journey time... do you know how happy that would make me?" Pre-family

"That looks pretty good, but does this mean that you could get on at Manchester say and travel right through to Brussels without changing? That'd be sensational" - Family

"Wow, let's get building. That would mean I could get down to see my daughter a lot more often"
– Empty Nester

"It's about time Britain caught up with the rest of the world in terms of the train network. We are so behind, it's embarrassing, but where are they going to find the money for it?" - Family

"Well that opens the country up a bit more for travel. I'd even consider going down to London for the day from Glasgow if I could do it in that time and it wasn't too expensive" – Empty-Nester

HSR DEEMED BOTH DESIREABLE AND INEVITABLE IF BRITAIN IS TO CATCH UP WITH EUROPEAN NEIGHBOURS. BIG QUESTION MARK OVER THE VIABILITY OF THE OFFER IN VIEW OF CURRENT ECONOMIC CLIMATE AND UNLESS OPENS NEW RAIL LINKS BEYOND THE UK

Facts and Figures : Stimulus



High Speed Rail Overview

- High speed trains travelling at up to 300km/h vs 200km/h nowadays (or 200 mph vs 125mph today)
- Offer a very reliable service
- 2 to 3 trains per hour from London to main cities such as Birmingham, Manchester, Leeds, Sheffield, Newcastle, Edinburgh, Glasgow, Bristol, with limited stops
- New modern trains
- New stations (or new facilities in existing stations) - mainly in city centres for the main cities, or on edge of town for smaller cities
- New track network



Example Travel Time Savings on HSR

London to....	Current rail journey time (typical)	Journey time on High Speed Rail	Journey time saving
Edinburgh or Glasgow	4:30	2:40	1:50
Leeds	2:25	1:25	1:00
Manchester	2:10	1:15	55 mins
Birmingham	1:25	45 mins	40 mins
Bristol	1:45	1:00	45 mins

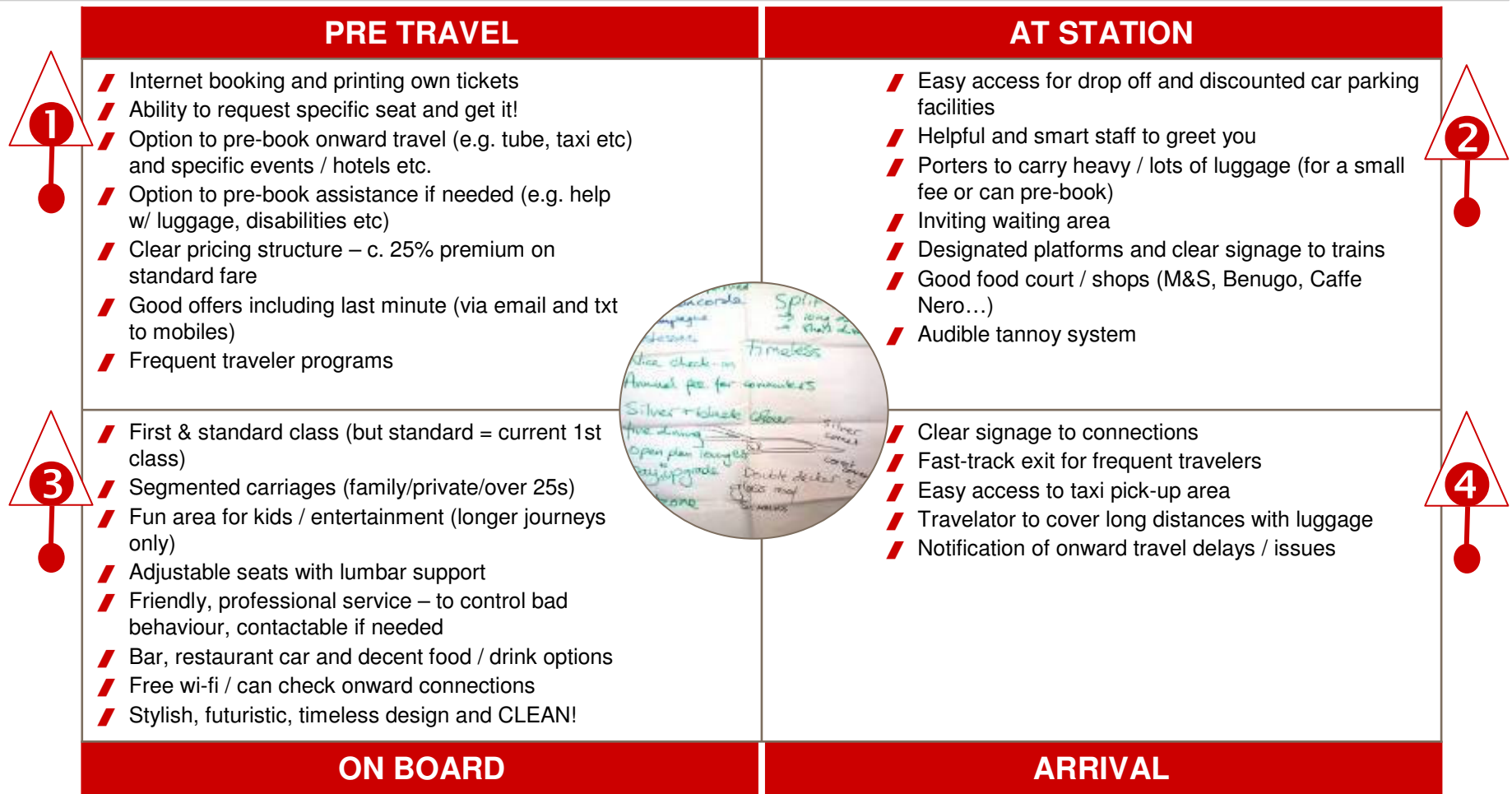




LOOKING TO THE FUTURE

- **Consumer Understanding of HSR**
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HSR : Ideal offer



VERY CONSISTENT REQUIREMENTS ACROSS GROUPS, WITH ALL SEEKING TO OPTIMIZE THE ENJOYMENT OF TRAVEL EXPERIENCE FROM START TO FINISH. AIR TRAVEL IS THE BASIS RE. KEY FEATURES REQUIRED

HSR : Essential features

- / Seamless end-to-end travel solution and optimized travel time were the two salient themes emerging in terms of what people felt was essential for HSR to offer in order to live up to expectations and requirements of future travel
- / This manifested itself slightly differently in terms of the key features highlighted dependent on the target group
 - **For Pre-family and Business travellers:** more about minimal disruption to their connection with the outside world, entertainment on-demand and quality food / drinks on offer
 - Wi-fi, TV screens on back of seats, private / meeting carriages, decent coffee and food (M&S, Pret-a-Manger...)
 - **For Families:** focus on stress-free travel and keeping children happy / distracted
 - Dedicated carriages for families, entertainment travel bags, easy and ample storage for luggage, clear signage for quick transit through stations, pre-booking of onward journeys
 - **For Empty Nesters:** desire for everything to be organized and nothing left to chance, as well as welcoming surroundings to make journey more enjoyable
 - Easy access to stations and assistance in finding right train and seat, inviting waiting areas and shops to pre-purchase food and drink, luggage compartments near seat for maximum security, clear signage and tannoy system to ensure don't get lost, ability to pre-book onward tickets

TWO KEY THEMES EMERGED IN TERMS OF THE ESSENTIAL FEATURES – EASE OF TRAVEL AND OPTIMIZATION. A SEAMLESS TRAVEL SOLUTION WHICH ENABLED YOU TO OPTIMIZE THE TRAVEL EXPERIENCE SHOULD BE AT THE HEART OF THE HSR OFFER WITH SOME TAILORING NEEDED TO SUIT DIFFERENT TARGETS.

HSR : Ideal offer

WHAT PEOPLE WANT...

PRE-FAMILY	LEISURE TRAVELERS	BUSINESS TRAVELERS
		
<p><i>"The Silver Comet... a double-decker train with a glass roof that lets in the light, and feels very luxurious"</i></p> <p><i>"A service where the staff is smart, friendly and courteous... don't really need them to do much but just reassurance that there's a nice welcome and someone there to make sure you are OK"</i></p> <p><i>"You'd want to be able to book all your travel needs in advance, like a taxi or tube ticket the other end – like a door-to-door journey price with maps and directions for connections"</i></p>	<p><i>"You'd like stations to be nice places to be, somewhere to buy your food and drink before you get on board and somewhere nice to sit and wait"</i> – Empty Nester</p> <p><i>"Anything that keeps the kids busy and happy – little touches like travel activity packs or a play carriage would be ideal"</i> – Family</p> <p><i>"You want it to be stress-free, why could you not have more convenient luggage spaces and help to get on and off the trains and people to be on hand so that we don't need to feel so lost when we arrive"</i> - Family</p>	<p><i>"It should have all the latest technology so that I can keep connected to the outside world while I'm travelling would be a huge benefit from a business perspective"</i></p> <p><i>"The ability to enjoy the experience rather than suffer it – this could easily be achieved with more comfortable surroundings, a dedicated business area for example and decent food and drink on offer"</i></p> <p><i>"Fast tracks, dedicated business facilities and why could it not work more along the lines of airports in terms of being able to check in your luggage"</i></p>

The Ideal HSR Offer – Leisure Travellers (Summary)

KEY FEATURES

PRE-TRAVEL

- Internet booking / print own tickets
- Pre-book onward travel + special events / hotels as complete package
- Clear pricing structure
- Pre-book assistance if needed (e.g. w/ luggage, disabilities etc)
- c.25% premium on standard fare acceptable
- More price deals esp. last minute – esp. Pre-family
- Frequent traveler programs

AT STATION

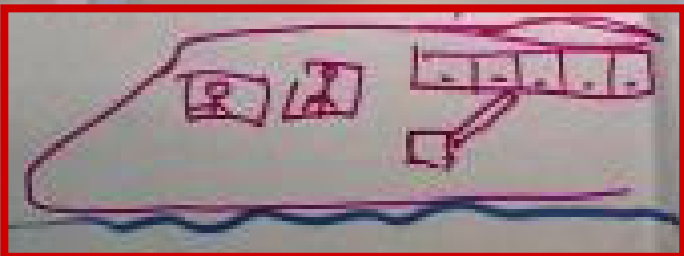
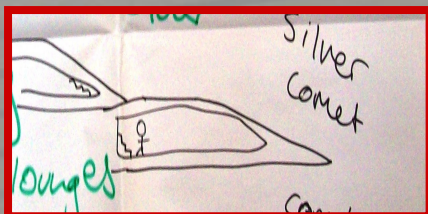
- Designated platforms and clear signage to trains
- Inviting waiting area – esp. Empty Nesters
- Helpful and smart staff to greet you
- Porters to carry heavy / lots of luggage (for a small fee or can pre-book)
- Easy access for drop off and discounted car parking
- Good food court / shops (M&S, Benugo, Caffé Nero)
- Audible tannoy system

ON-BOARD

- Segmented carriages (family/private/over 25s)
- Fun area for kids / entertainment zone (longer journeys only) – esp family
- Friendly, professional service – to control bad behaviour, contactable if needed
- Bar, restaurant car and decent food / drink options
- Free wi-fi – esp. pre-family
- Business & standard class (but equivalent to current 1st class)
- Adjustable seats with lumbar support
- Stylish, futuristic, timeless design and CLEAN!

ON ARRIVAL

- Clear signage to connections
- Easy access to taxi pick-up area
- Travelators to cover long distances with luggage
- Notification of onward travel delays / problems



"The Silver Comet... a double-decker train with a glass roof that lets in the light, and feels very luxurious"
– Pre-family

"You want it to be stress-free, why could you not have more convenient luggage spaces and help to get on and off the trains and people to be on hand so that we don't need to feel so lost when we arrive" -
Family

"You'd like stations to be nice places to be, somewhere to buy your food and drink before you get on board and somewhere nice to sit and wait" –
Empty Nester

The Ideal HSR Offer – Business Travellers (Summary)

KEY FEATURES

PRE-TRAVEL

- Internet booking / print own tickets
- Set pricing structure – irrespective of when booked
- Pre-book onward travel + track timings / problems on-board
- 24 hour travel to avoid hotel stays
- Frequent traveler programs – keeps log of history of travel preferences / offers tailored discounts
- Refunds / travel points if do not meet arrival times

AT STATION

- Designated platforms within existing stations
- Business lounge areas with WIFI
- Fast-track check in / access to platform
- Good food / drink options
- Extended facilities – i.e. shoe-shine stations, Boots...
- Luggage drop off or porter facilities

ON-BOARD

- Segmented carriages (family/private/over 25s)
- Business carriages for private meetings and efficient WIFI, charger, video-conferencing facilities...
- Comfortable surroundings - seats with reclining options, blinds at windows, table lamps for working
- Contemporary hotel-feel – plush, comfortable, cool colours
- Good food / drink options (Starbucks, Eat franchises...)
- Screens on back of seats with entertainment options for films / check travel progress / connections etc

ON ARRIVAL

- Information Officers on hand for quickest route advice to connections
- Fast-track exit for frequent travellers
- Easy luggage pick up point
- Travel Zone for advice on hotels / events etc
- Travelators to cover long distances with luggage
- Designated taxi rank
- Link into shuttle trams to key points of interest in city

“It should have a catchy name like SWIFT... you get the sense then of a whole new experience and the sense of speed” – Business-woman

“It should have like a contemporary hotel feel to it... plush, nice fabrics, and cool colours” – Business-woman

“The ability to enjoy the experience rather than suffer it – this could easily be achieved with more comfortable surroundings, a dedicated business area for example and decent food and drink on offer” – Business-man

“Fast tracks, dedicated business facilities and why could it not work more along the lines of airports in terms of being able to check in your luggage” – Business-man

“Information advisors who are actually keen to help you with any onward travel queries not some bored person who doesn't give a damn” – Business-woman

HSR : Ideal Offer – Gallery of Ideas

REALISTIC PRICES
NO CHECKING IN


INTERIOR
SIMPLE
STYLISH
TIMELESS
BRANDED-TIE IN WITH
UNIFORM/LO

KIDS + FAMILY CARRIAGE
FIRST + STANDARD CLASS
QUIET COACH

BUSINESS LOUNGE IN STATION

HIGH STANDARD OF SERVICE
- SMARTLY DRESSED STAFF
- COMPARE TO AIR HOSTESS

COMFORTABLE
- ADJUSTABLE SEATS
- ENTERTAINMENT - FILMS
- WIRELESS CONNECTION
- PRIVATE CARRIAGES
- POWER SOCKETS



Pre-family

① PRE-JOURNEY (Planning info, Booking, PRICING...)

- Internet - linked to Europe
- Red Button Day
- 1. Booking from location to wherever in Europe
- Works out departure time
- Code standard + fast together
- Options of 2 costs using fast + slow
- Plans your route
- Comparative prices - expect to pay more but not a lot
- Ability to book down from station

② AT THE STATION (Getting to - on train)

- Car Park for use at station
- Point-door to stations now
- Own platform or check in
- Easy access
- No platform change
- Good facilities whilst waiting
- Helpful staff

③ THE JOURNEY (Look + Feel of train, FACILITIES, CONVENIENCES BETWEEN CARRIES...)

- Premium / First Class - meals drink as middle or normal
- High standards - look 3A as 2A or 1A
- Quiet train
- Child free carriage option
- Nice food / served correctly on nice plates
- Put one on
- Food carriage
- Nice bar area
- Clean regularly maintained large toilets
- Clean, clinical, fresh, minimalist
- Colour of train represent Union Jack

④ ARRIVING (Getting off train, connections etc)

- Easy to connect to Europe
- Not remote - near other communities
- Taxi ranks outside etc
- Option lounge to wait whilst taxi arrives
- Bookable taxi options - all booked at once
- No delays!!!
- Link into electric cars

Family

HSR : Ideal Offer – Gallery of Ideas

① PRE-JOURNEY (INFO/BOOKING/PRICES...)

- INTERNET BOOKING - CONVENIENCE BUT SIMPLE
- COMPETITIVE PRICES (12 HR. LIVE) ±10-20% BUT NOT EVENING
- STOCK-PRICE OPTIONS - CONCESSIONS
- SAVINGS (CABLE TO GRANT) - TICKETS FROM THREE-THREE-THREE
- PROMOTIONS & ADVERTS - TRAVEL COMPANIES
- E-MAIL OFFERS
- HOTEL OFFERS - (AS PER AIRLINE'S)
- O.A.P. CONCESSIONS
- PRINT OWN TICKETS

② AT THE STATIONS (GETTING TO AND FROM TRAIN...)

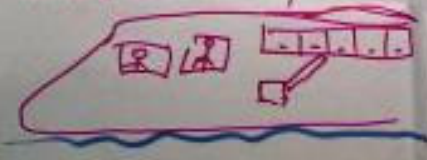
- EASY DROP OFF POINT
- PACKING
- IDENTIFIED PLATFORM - STAFF
- EASY TRANSFER OF BAGGAGE
- MEET & GREET SERVICE
- PRE-BOOKED SEATING (NON SEAT)
- FOOD & DRINK (M+S)
- ACCOMMODATION
- ABLE TO BOARD TRAIN WELL IN ADVANCE

③ THE JOURNEY (LOOK & FEEL OF TRAIN, FACILITIES, SUPERIOR COMFORT ETC...)

- SEMI-CLASH BAGGAGE BAGS ON COACHES
- STREAMLINED COMFORT
- NO OVERCROWDING
- RE-CLASH SEATING
- WI-FI
- TRAVEL POINTS
- TABLES
- FIRST & BUSINESS CLASSES
- ENTERTAINMENT - 100% TV SCREEN, PAPER
- LEATHER SEATING

④ ARRIVING (GETTING OFF/FINDING CONNECTIONS...)

- MEET & GREET STAFF
- BAGGAGE COLLECTION
- ELECTRIC WALKWAY
- EASY ACCESS TO NEXT JOURNEY
- USER FRIENDLY DIRECTIONS



Empty Nester

① PRE-JOURNEY (INFO/BOOKING/PRICES...)

- INTERNET / EASY PHONE CALL & NOT 'OUTSOURCED'!
- PRICE - SET IN ADVANCE OF WHEN BOOKED
- LINK ON WEBSITE TO FIND THE CHEAPEST JOURNEY & TRIP OR ON SCHEDULE TRIP LINK
- EASY TO UNDERSTAND WHOSE SIDE JOURNEY/BOOKING LINKS
- REALLY GOOD MAIN PANEL (IN SHARE WITH AIR 'ONLINE')
- 24 HOUR SERVICE TO AVOID HOTEL STOPS = SAVES MONEY

② AT THE STATIONS (GETTING TO AND FROM TRAIN ETC...)

- WITHIN EXISTING STATION AS FAR AS POSS - OR VERY GOOD WALK BRIDGE IN NEW LEANING OVERPASS
- LEAVE DROP OFF USE PLANE
- EXPLANATIONS/INSTRUCTIONS ALL RELEASE OF LEANING OVERPASS
- LEAVE/STATION AREA FOR WAITING (CONVENIENCE & PRICE FACILITIES)

③ ON-BOARD (LOOK & FEEL OF TRAIN, FACILITIES, CLASSES ETC...)

- POUR/COMP/VIEW PASSES + COOL CHAIRS
- CONTEMPORARY HOTEL FEEL - SUBTLE LIGHTING
- INDIVIDUAL LIGHT FIXTURES
- WIFI/NET
- MEMORABLE
- FIRMS LIKE ON PLANE (INDIVIDUAL SCREENS)
- SEATED & KID FREE
- PHONE FREE
- BUSINESS MEET
- PRIVATE MEET
- HANDSOME MEET
- LETTER BOX OR BOX
- BOOKS AT WINDOWS
- GOOD PAIR/REFRESHMENTS & STAGGERS & DRINKS
- LOTS OF MEETING NOT ONE CHAIRMAN
- MEMORABLE OFFICIAL MEET
- DAWN FREE ETC.
- WHAT THE HONORABLE/CLASS
- CLEAN!

④ ARRIVING (GETTING OFF/FINDING CONNECTIONS...)

- INFORMATION OFFICERS/MONITORS ON HAND
- NOT 'OUTSOURCED' BOARD PERSON
- ACCESS TO LUNAR IF HAVE TO WAIT FOR CONNECTION
- WITH TRIP CLOCK - SHORT PHONE
- WINE? & FAVORITE SWEETS NICE!
- TRICOMM
- EVER LEANING PICK UP POINT

Business

Headlines : HSR Offer

Clear need to educate and reassure

Educate as to what HSR actually is in view of low current awareness and experience to date

Overcome latent credibility issues given the poor reputation of the rail network to date and general perception that don't have the skill set necessary in the UK to make it work

– **“I think of the Eurostar as French, isn't that sad... because it works and it looks good”**

Reassure re. budgetary concerns as widespread scepticism in the current economic climate that enough budget will be made available to build the necessary infrastructure (new tracks, stations etc) trains and the esp. in light of recent press articles

In terms of the offer, it seems to have genuine appeal for traveller in terms of minimizing travel time, but there is also a latent sense of not just being desirable but necessary for the nation to 'catch up'

Reduced duration of travel time is key hook rather than the speed of the train

Britain is felt to lag far behind other European countries in this respect but some feel that the size of the country has not warranted the investment to date

Airline travel is heavily influencing the basis of many of the features

At this point in time consumers are only really able to upgrade current rail service rather than being able to envisage a completely different offer

Key features of interest focus on the idea of seamless travel solution and optimizing travel time on board.

Taps into a strong desire for greater control over travel plans and need to minimize things going wrong

Train travel has strong potential to deliver the optimal journey experience and should a focal point of the HSR offer in order to deliver USP vs competitor modes of travel

A strong branding exercise could go a long way to building an identity and sense of purpose for the offer

Virgin are already changing train travel expectations via their current offer

Also likely to instill a sense of pride back into Britain's rail travel offer

Agenda

Background and Objectives

Research Headlines

THE WAY FORWARD

Agenda

THE WAY FORWARD

- **Compelling Messaging Platforms**
- **What Misses the Mark**

Agenda



THE WAY FORWARD

- **Compelling Messaging Platforms**
- What Misses the Mark

Overview of Potential Messaging Platforms



THREE POTENTIAL MESSAGING PLATFORMS IDENTIFIED AS RESONATING STRONGLY WITH CONSUMERS. THOSE IN RED HAD MORE UNIVERSAL APPEAL, WHILST THOSE IN GREY WERE MORE TARGET SPECIFIC OR CARRY SPECIFIC EXPECTATIONS WHICH MAY NOT BE ACHIEVABLE. 'LAP OF LUXURY' WAS DEEMED A POTENTIAL SUPPORT RATHER THAN A STRONG PLATFORM IN ITS OWN RIGHT

Messaging Platforms : Connectivity

HASSLE-FREE FROM A to C...



WHY COMPELLING

- /// Taps into a latent desire to be able to make the complete journey hassle-free
- /// Focuses on the ability to take control of travel plans and book tickets for the entire journey to minimize stress and optimize time – all on the internet at the click of a button!
- /// Promise of easier inter-connections with other forms of transport – all will work in a synchronized rather than disparate /random way
- /// Sense of logic and intelligence about what needs traveler might have at destination to and making it easier for them to take advantage of deals (e.g with hotels, Oyster card etc)

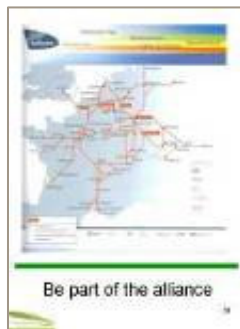
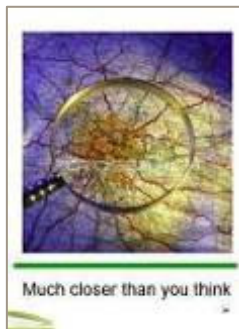
KEY TARGET APPEAL

- /// Universal appeal for making travel easier and more synchronised

USP for HSR: Integrating the train journey into a more positive overall travel experience

Messaging Platforms : **Connectivity**

BRIDGE THE GAP...



WHY COMPELLING

- // Signifies a major advance in Britain's rail network to be able to compete / complement with the more technologically advanced European rail systems – sense of renewed pride
- // Opens opportunities for greater travel throughout Europe and a genuine alternative to air travel – feel like part of a bigger picture

CAVEAT

- // some expectation that trains will run direct to Paris / other major European cities

KEY TARGET APPEAL

- // All targets, although greater appeal to those living outside of London (if connects straight through) and older who are more into the idea of enjoying a longer train journey

USP for HSR: Fast link into the European network, broadens travel opportunities and renews pride in British rail system

Messaging Platforms : Experiential

A TOUCH OF MAGIC...



WHY COMPELLING

- // Taps into the desire to enjoy the journey just as much as getting to the destination
- // Gives train travel a new sense of glamour (now shine coming off air travel)
- // Promise sense of something special, wanting to feel pampered / privileged
- // Speed, interior design and comfort are all intrinsic to this sense of magic
- // Luxury element is desirable but also risk of being interpreted as being 'exclusive' and unattainable for majority

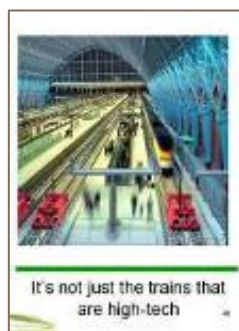
KEY TARGET APPEAL

- // All looking for a bit of something special in travel experience
- // Eclectic fun factor of greater appeal to pre-family for event-linked occasions

USP for HSR: Creates a renewed sense of mystique and magic around the train travel experience

Messaging Platforms : **Experiential**

HIGH TECH TRAVEL...



WHY COMPELLING

- /// Promises a step-change in train travel in terms of all-round experience
- /// Focuses on the high tech features as key point of differentiation from normal trains and vs other forms of transport
- /// Denotes something futuristic and out of the ordinary

CAVEAT

- /// delivers to high tech needs of the future, although these are not easy to anticipate at this time

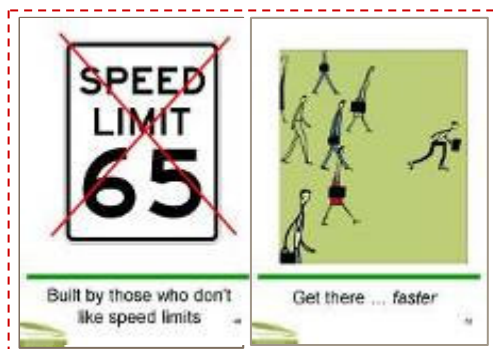
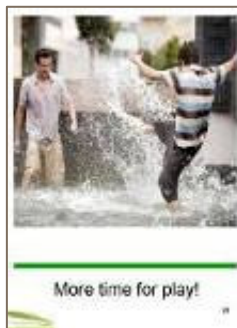
KEY TARGET APPEAL

- /// Mainly younger, business people and men

USP for HSR: Delivers progress with multiple benefits for the traveler

Messaging Platforms : Optimisation

SAVE TIME TO MAKE TIME...



Caution re
execution →

WHY COMPELLING

- Focus on key benefit of reducing travel time
- Emphasizes pros vs. other modes of transport
- Puts the emphasis on the fun factor – deliver more fun quicker

CAVEAT

- Overt speed references can be a little 'scary' for some as implies a danger factor which travelers do not like to be reminded of especially as regard trains as being safe. Speed associated with stress not conducive to how travelers want to be made to feel (i.e. calm and in control)

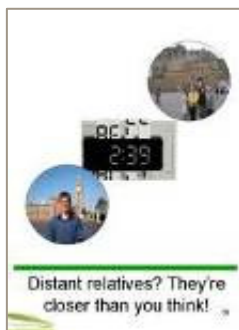
KEY TARGET APPEAL

- All targets, although greater appeal to those living outside of London (if connects straight through) and older who are more into the idea of enjoying a longer train journey

USP for HSR: Faster journey times means giving people back more time to spend on doing what they want to do

Messaging Platforms : Optimisation

SHRINK BRITAIN...



WHY COMPELLING

- // Focuses on the idea of making the most of visiting different parts of Britain – not just looking to overseas for adventure
- // Taps into more emotional desire to shrink distances to spend more quality time with family and friends
- // Provides greater opportunity to fit more into the day

CAVEAT

- // Expectations of a more extensive network throughout Britain not just major cities in order to deliver to sense of shrinking Britain as major cities are already well served

KEY TARGET APPEAL

- // Mainly Family and Empty Nesters as family is more of a focus and frequency of visits often impaired by distance and travel time
- // Also Business people but on a more pragmatic basis of being able to get somewhere faster / achieve more with their time

USP for HSR: Bringing family and friends closer together by shrinking distances

Agenda

THE WAY FORWARD

- Compelling Messaging Platforms
- ***What Misses the Mark***

Themes that missed the mark

GO GREEN



WHY?

- // Lacked credibility re. carbon neutral – too extreme a claim
- // Sheer quantity of noise re. green messages in society generally means that often washes over people without impacting on them
- // Nice to know and expected of future form of transport but not as compelling a lead message for HSR offer

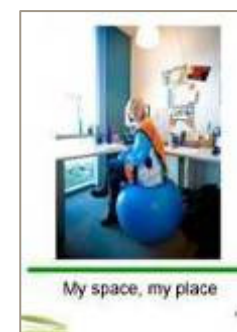
NOSTALGIA



WHY?

- // Wrong angle for a futuristic mode of travel and referencing the past only brings 'the bad old days of rail' to mind
- // 'Twee touches' not deemed appropriate either to state-of-the-art train. Freebies and extras to make the journey more enjoyable are appreciated but not if wrapped in saccharine 'care' package

INDIVIDUALITY



WHY?

- // Concept of tailoring to own needs is appealing but sense of being able to personalize own space on the train deemed excessive and impractical, esp. on relatively short journeys
- // Providing greater flexibility around train schedules and costs of far greater appeal

Executional Guidance : what to avoid

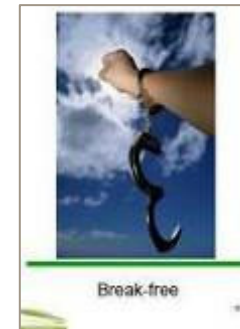
STEREOTYPES ...



WHY?

- // Caution re. using stereotypical images that serve as a reminder of irritating travel companions – football jobs!
- // Other images such as a wedding etc. more appropriate to convey sense of not wanting to miss out on an important event, which is compelling in reinforcing the dependability of the service

EXCESSIVE FREEDOM / RELAXATION ...



WHY?

- // Over-promise – still expect to feel constrained by time schedules and fare structure
- // Domestic travel not deemed to be a form of therapy – escapism to another country / new life more akin to a therapeutic travel experience

Headlines : The Way Forward

Messaging platforms showing greatest potential are those which tap the most differentiating aspects of the HSR offer:

Connectivity – promises a seamless total journey experience

Experiential – maximizes the enjoyment of the journey via a new breed of train travel experience

Optimization – focuses on the speed of the train to shorten distances and give you more time to do the things that are important to you

The sense of ease and speed however permeates all the potential messaging routes as deemed to be at the heart of the HSR offer

Messaging based on 'Go Green', 'Nostalgia' or 'Individuality' themes are either to be:

Not motivating enough as a lead idea (Go green)

Too much of an overpromise (Individuality)

Contrary to the futuristic spirit of what HSR is about (Nostalgia).

In terms of executional guidelines, portraying 'the wrong type of traveller' or over-egging the benefits of the offer could potentially alienate travellers (not for me) or add to the sense of scepticism of "Britain will never do it"

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