

# A Vision for High Speed Rail

## *Topline Debrief to Greengauge21 – Phase 2 Quant*

The  
**Leading  
Edge**



# Research Approach

## 1. INSPIRATION



- Overview of existing research data
- Review of key messages delivered by different modes of transport in UK and globally
- Creation of gallery of creative stimulus around the future of HSR to explore with consumers

Hypotheses and ideas on current perceptions and future potential for HSR

## 2. EXPLORATION



- Creative consumer workshops with cross section of leisure travellers from different life stages and locations
- Identification of consumer needs and wants / current landscape and also vision(s) for the future

Identified barriers and drivers for HSR and vision for future communication

## 3. REFINEMENT



- Quantitative study to provide data to support and underpin qualitative findings
- Further qualitative refinement of key messages, style and tone of communication etc.

Refined communication strategy and prioritised areas of focus

## Study Design : an Overview

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- /// On-line study of N=1000 with a UK National Representative sample
  - based on age, sex and demographics
  - soft quotas around region and ethnicity
- /// A minimum of the 300 long distance travellers (over 75 miles and in the last 6-12 months)
- /// Interview length of 20 minutes with two open-ended questions.

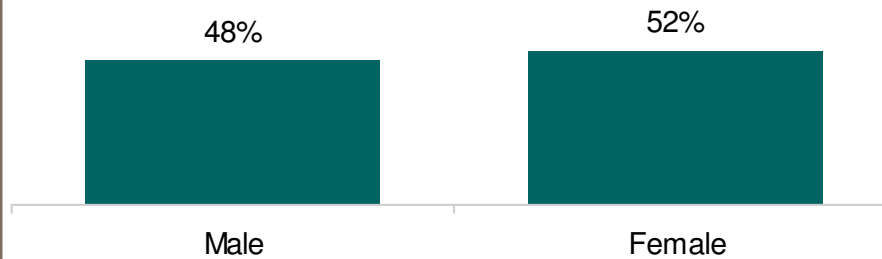
## ***RESEARCH HEADLINES***

- ***TRAVELLER PROFILING***
- *Focus on the Train Traveller*
- *HSR concept evaluation*
- *HSR delivery expectations*
- *Optimizing future use of HSR via positioning*
- *Appendix*

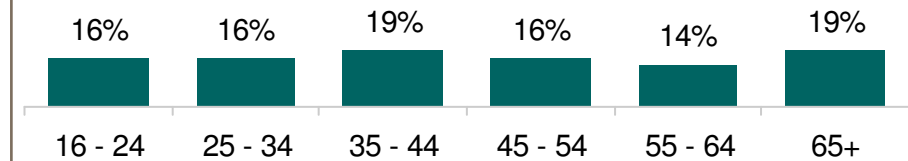
## Who did we speak to?

### NATIONALLY REPRESENTATIVE SAMPLE

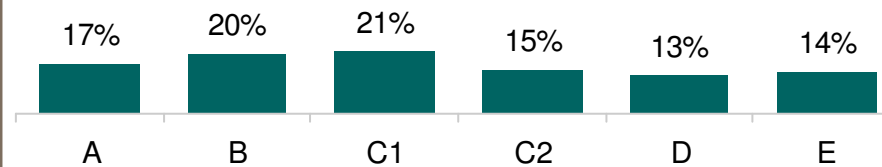
#### Gender



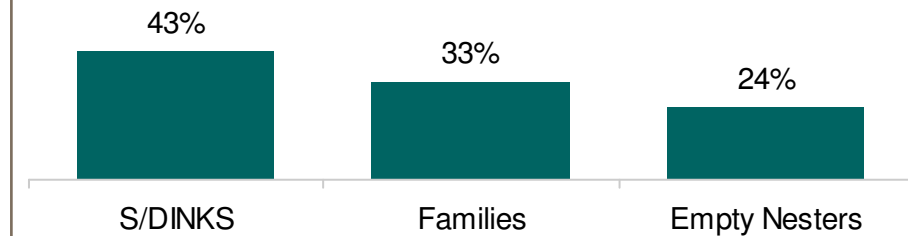
#### Age



#### Sec



#### Lifestyle

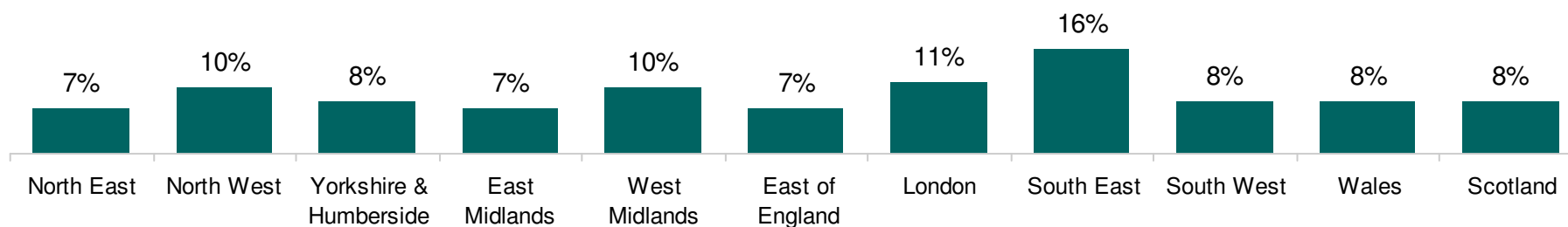


BASE: TOTAL N=1008 S/DINKS = SINGLE / DOUBLE INCOME NO KIDS

## Where do they live?

### NATIONALLY REPRESENTATIVE SAMPLE

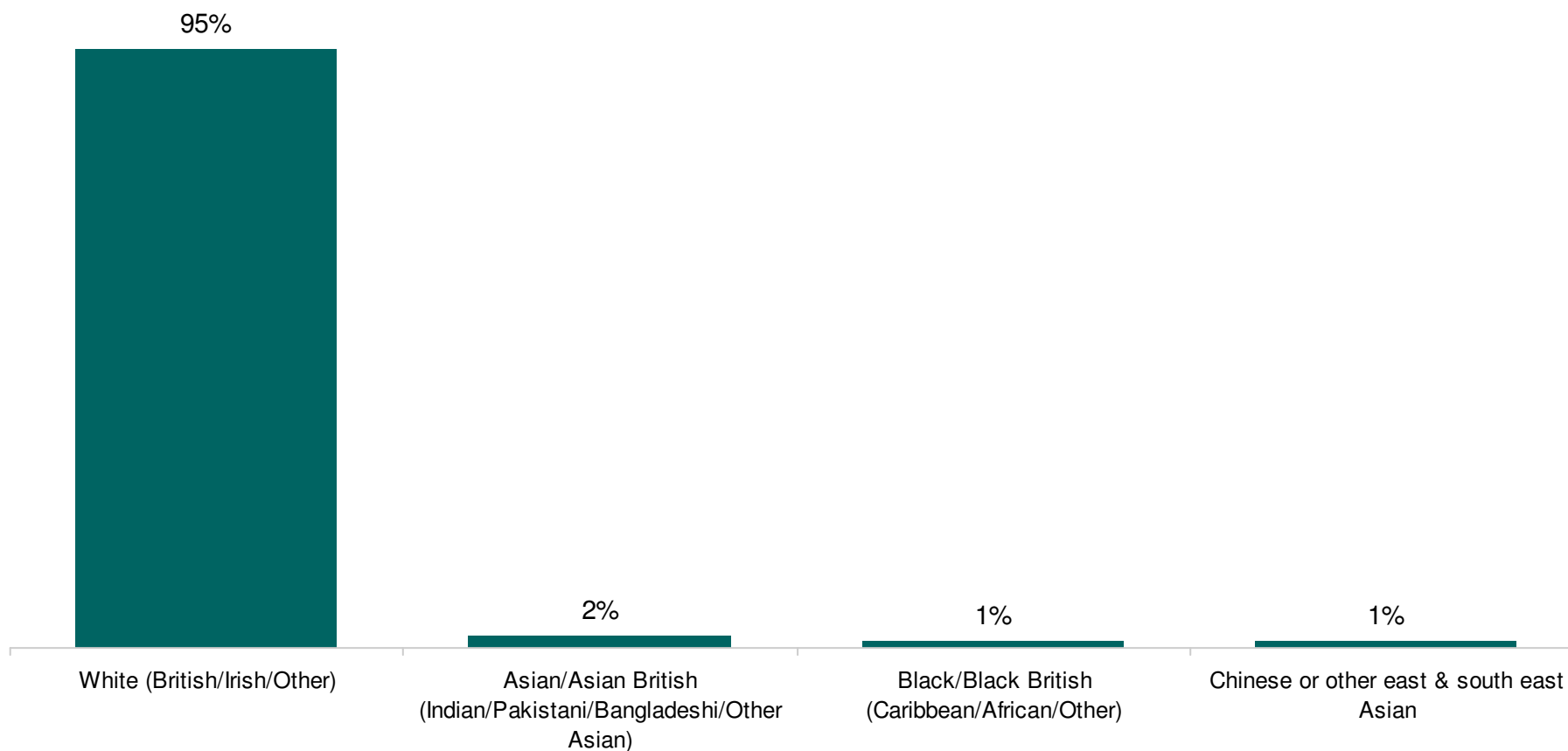
#### Region



BASE: TOTAL N=1008

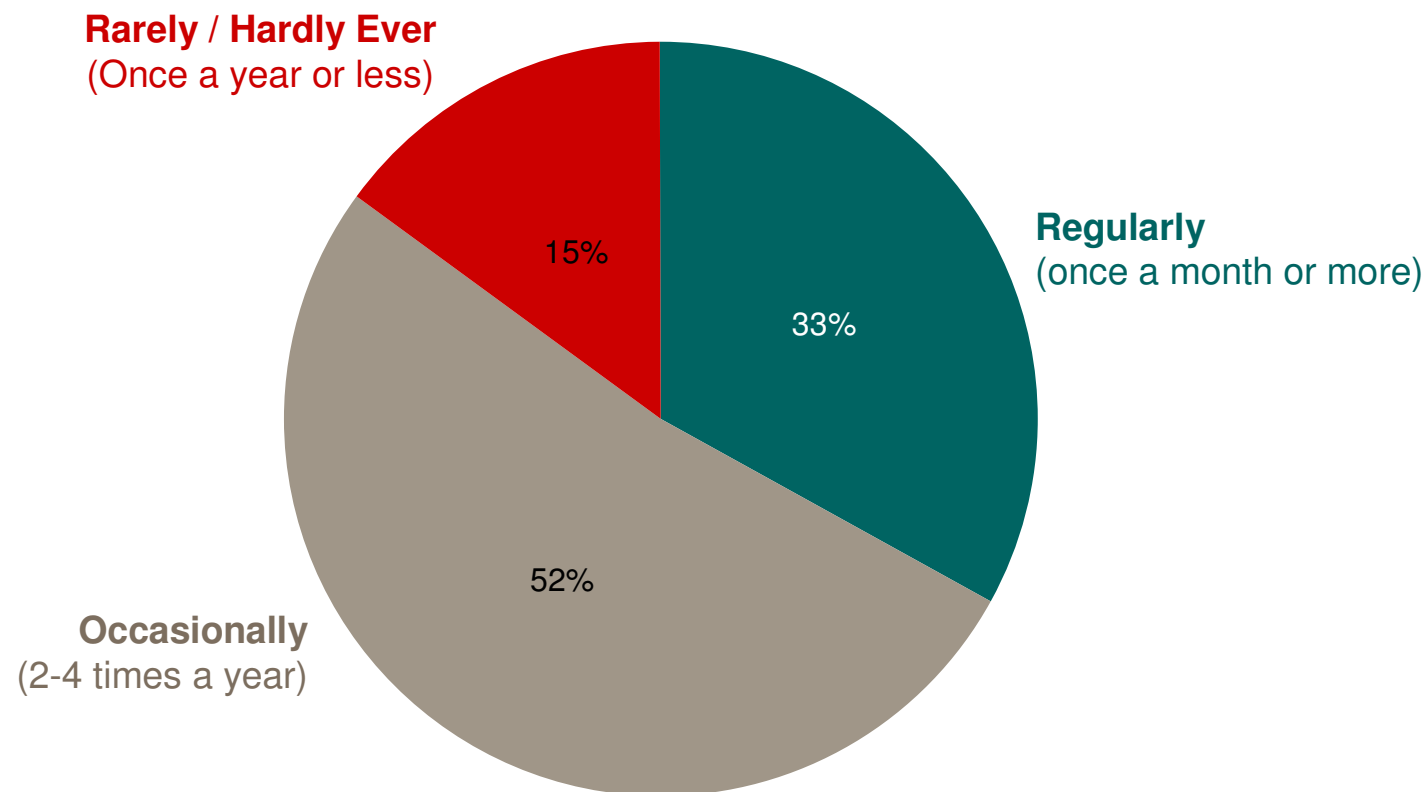
## What is their ethnic background?

### NATIONALLY REPRESENTATIVE SAMPLE



BASE: TOTAL N=1008

## How often do they travel long distance in UK?

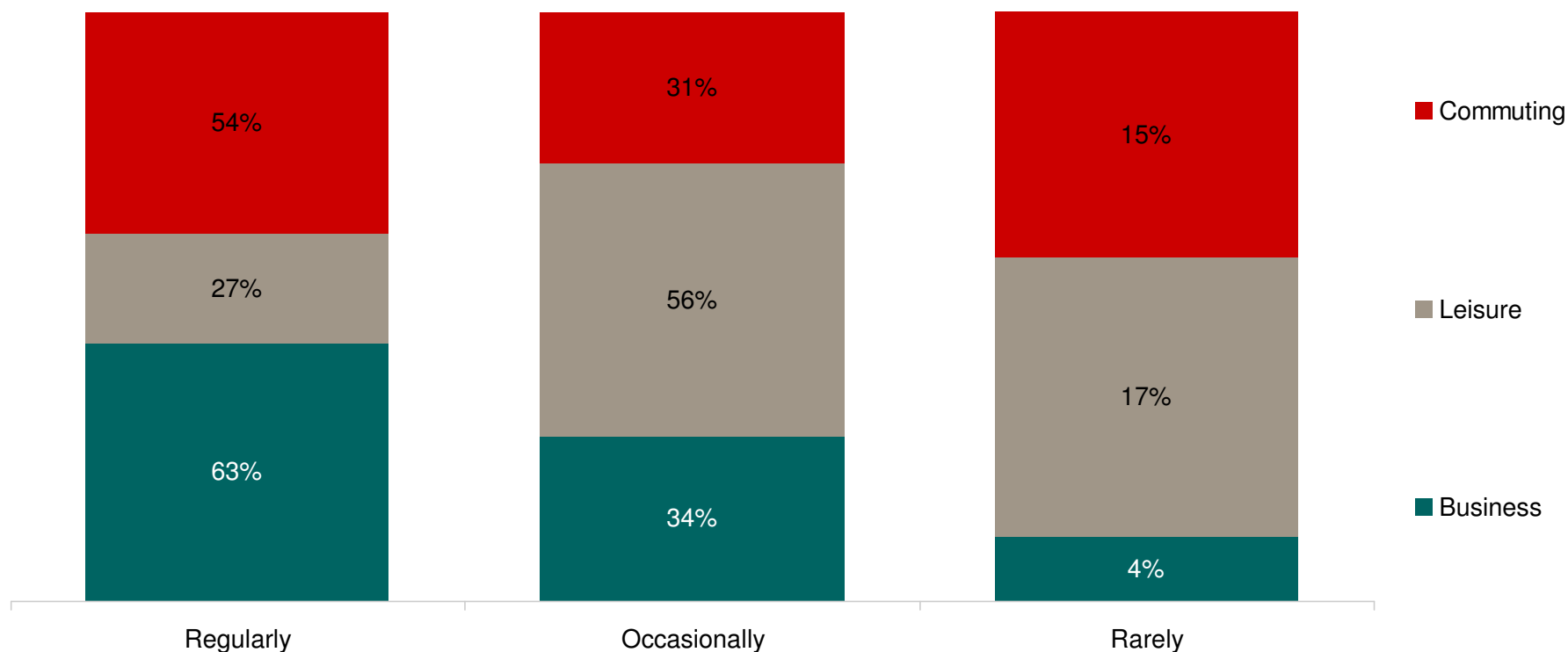


BASE: TOTAL N=1008

**OVER HALF TRAVEL LONG DISTANCE OCCASIONALLY, WHILST A THIRD ARE MORE REGULAR TRAVELLERS**



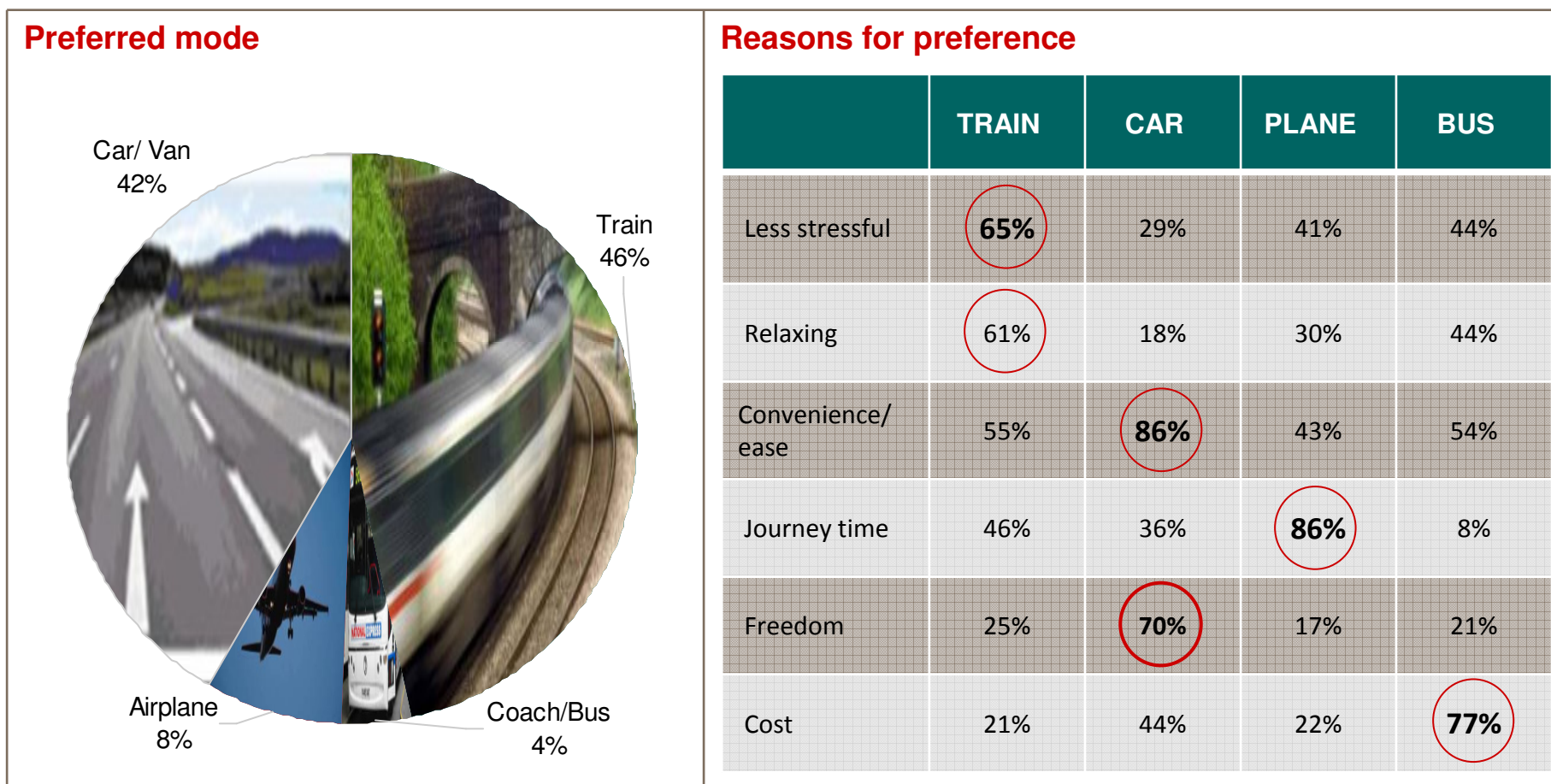
## For what purpose?



BASE: TOTAL n=1008. Travel long journeys: Regularly n=332, Occasionally n=523, Rarely n=153

**LONG DISTANCE TRAVEL IS PREDOMINANTLY FOR LEISURE PURPOSES, BUT BUSINESS TRAVEL FEATURES MORE STRONGLY FOR REGULAR TRAVELLERS**

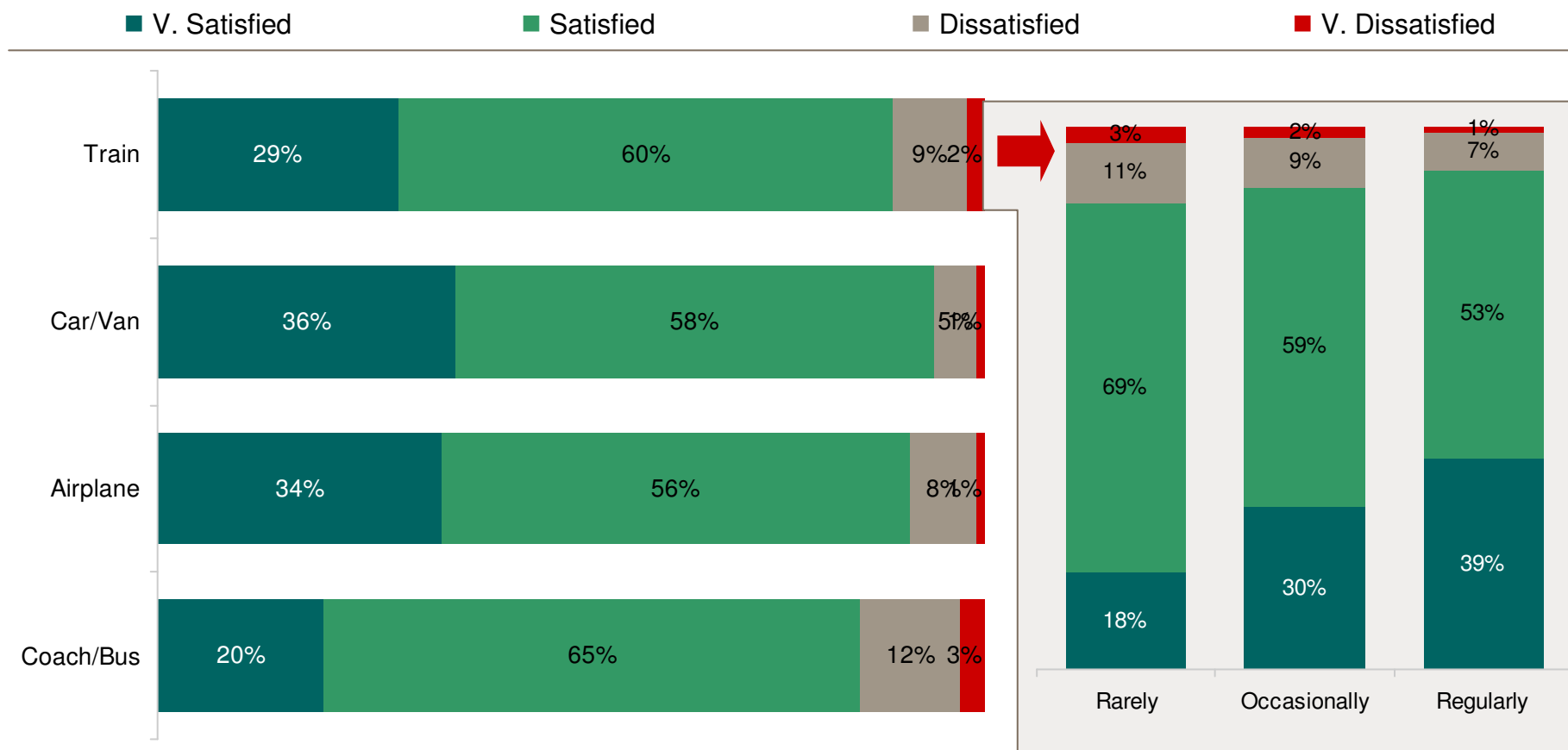
## Why do they prefer this mode of transport?



BASE: TOTAL n=1008. Prefer Train n=470, Car n=423, Plane n=76, Coach n=39\* \*Caution small base size

**EVEN SPLIT OF TRAVELLERS PREFERING CAR OR TRAIN FOR LONG DISTANCE JOURNEYS. REASONS REINFORCING QUAL FINDINGS THAT TRAIN HAS THE BENEFIT OF BEING LESS STRESSFUL/ RELAXING, WHILST CAR IS PREFERRED FOR CONVENIENCE AND FREEDOM FACTORS**

## And how satisfied are they?



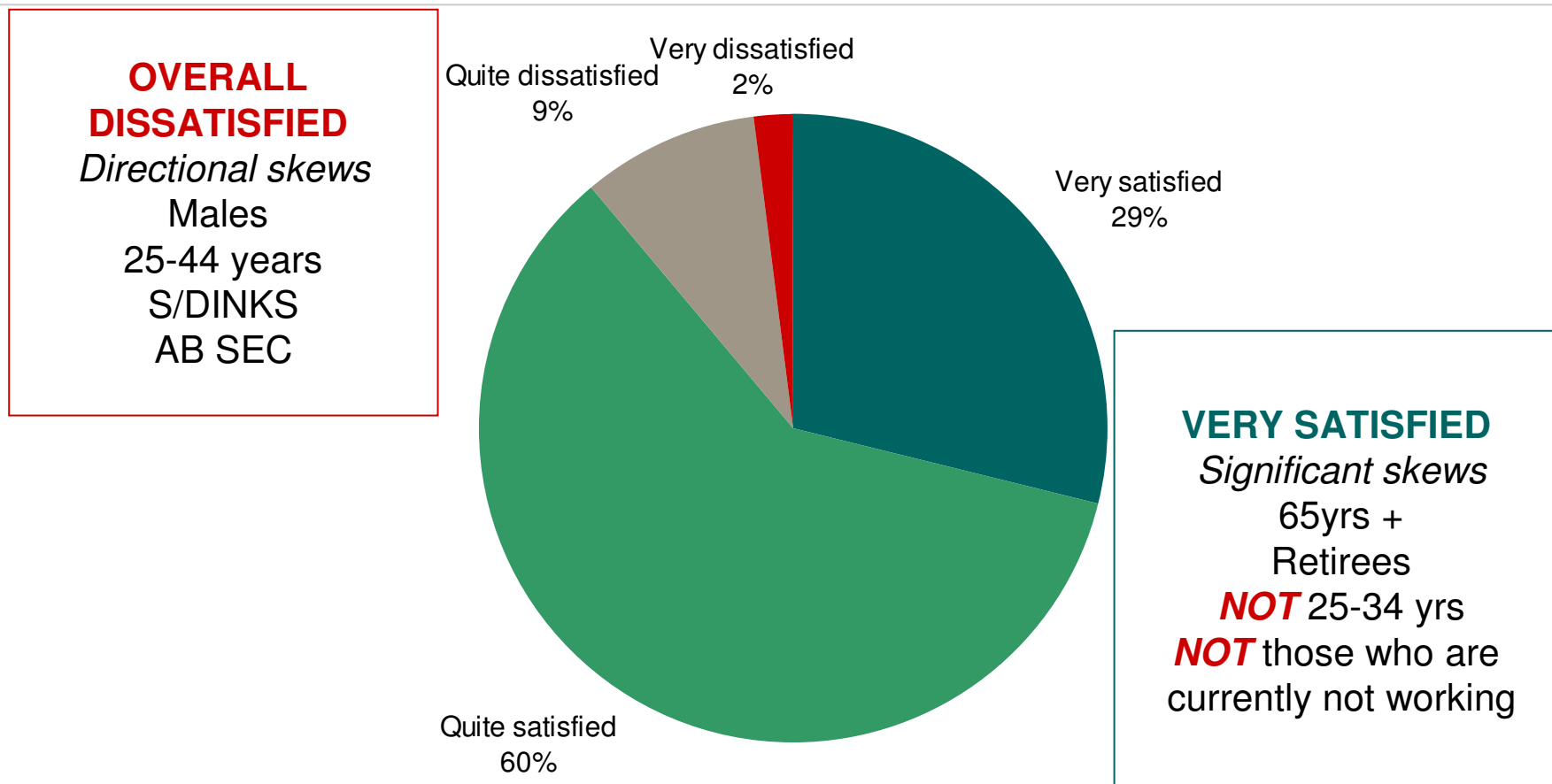
BASE: TOTAL n=1008. Use mode of transport (A3) Train n=811, Car n=679, Airplane n=261, Coach n=247

**TRAINS LOWER SATISFACTION LEVELS VS. CAR/PLANE, ALTHOUGH HIGHER SATISFACTION LEVELS AMONGST THOSE WHO USE TRAIN MORE REGULARLY**

## ***RESEARCH HEADLINES***

- *Traveller profiling*
- ***FOCUS ON THE TRAIN TRAVELLER***
- *HSR concept evaluation*
- *HSR delivery expectations*
- *Optimizing future use of HSR via positioning*
- *Appendix*

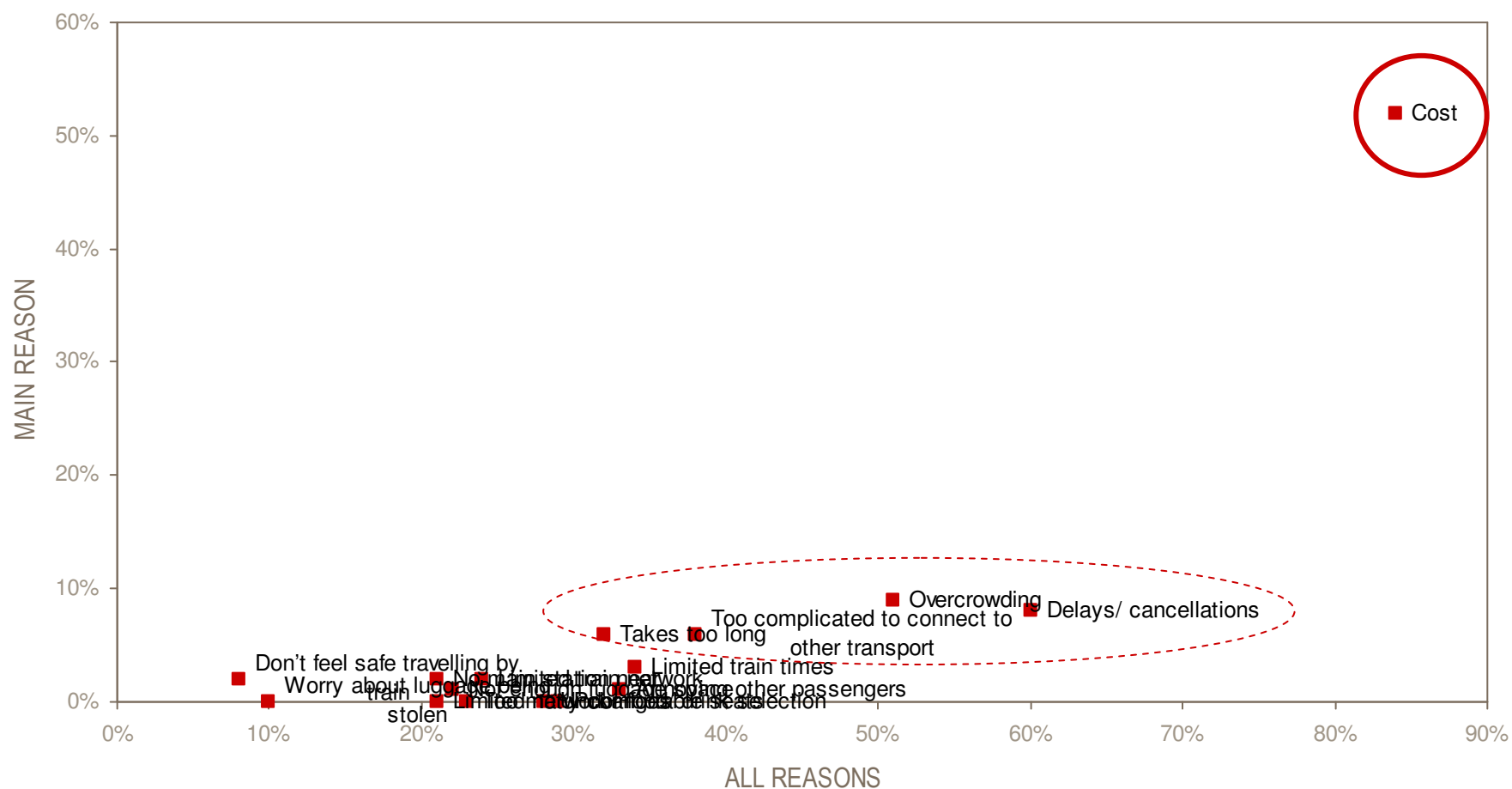
## How satisfied are they with train travel?



BASE: TOTAL TRAVEL BY TRAIN N=811

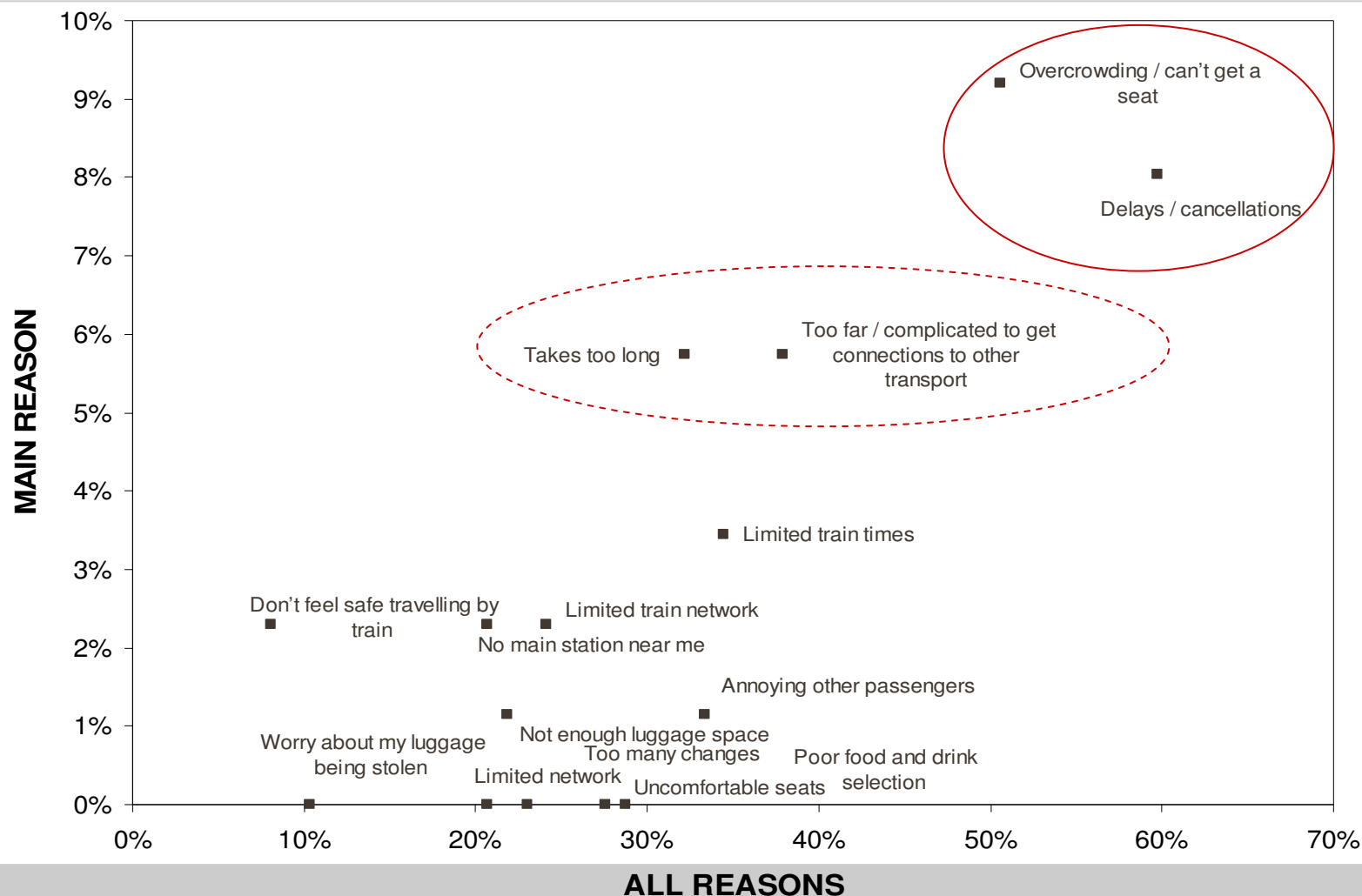
**GENERALLY SATISFIED OVERALL, WITH OLDER TRAVELLERS SHOWING GREATER SENSE OF SATISFACTION THAN YOUNGER AND PARTICULARLY MALE, HIGHER SEC SINGLE INCOME NO KIDS/ DOUBLE INCOME NO KIDS (SINK/DINKS), WHO ARE POTENTIALLY QUICKER TO TAKE ISSUE AND CRITICISE THAN THEIR OLDER, MORE ACCEPTING COUNTERPARTS.**

## Drivers of Dissatisfaction



**COST IS THE CLEAR DRIVER OF DISSATISFACTION**

## Drivers of Dissatisfaction – in Detail



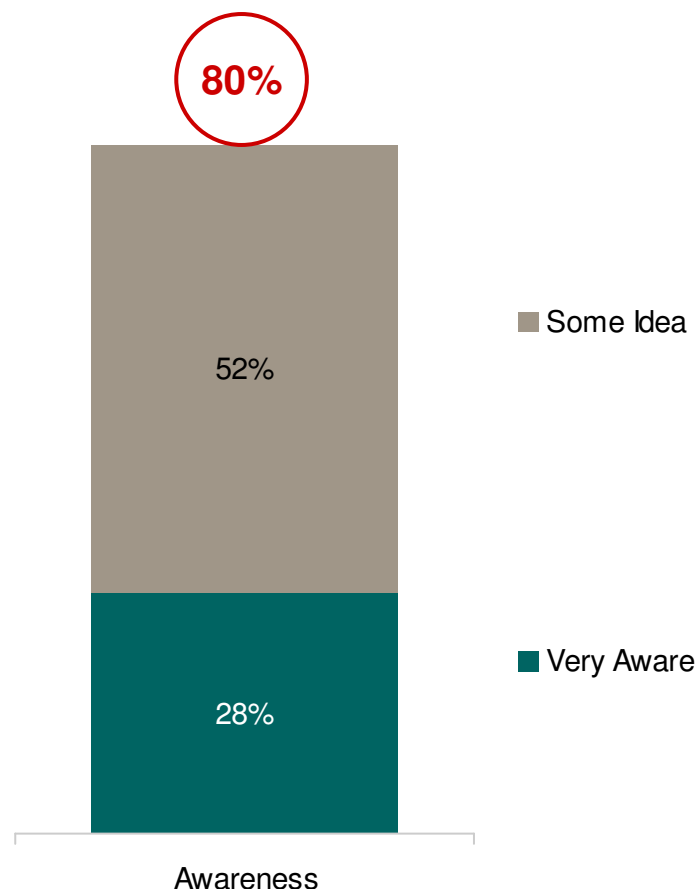
**TAKING COST OUT OF THE EQUATION, OTHER KEY DRIVERS ARE FOCUSED ON OVERCROWDING AND DELAYS / CANCELLATIONS, WHILST TIME CONSUMING / COMPLICATED CONNECTIONS ARE ALSO AREAS OF DISSATISFACTION.**

## **RESEARCH HEADLINES**

- *Traveller profiling*
- *Focus on train travellers*
- **HSR AWARENESS AND CONCEPT EVALUATION**
- *HSR delivery expectations*
- *Optimizing future use of HSR via positioning*
- *Appendix*



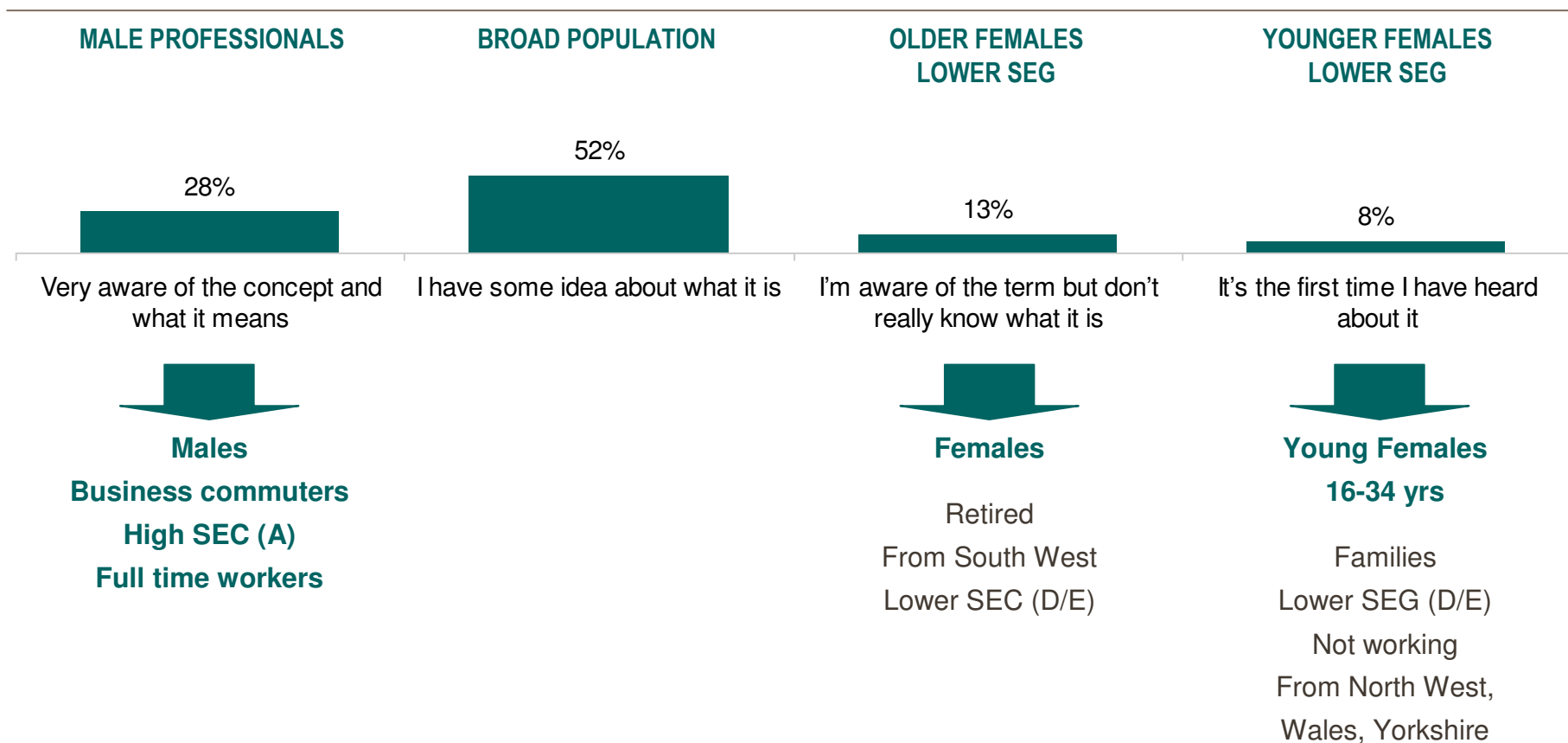
## HSR : Initial Awareness Scores



BASE: TOTAL n=1008

**PRIOR TO SHOWING THE CONCEPT, MAJORITY ARE AWARE OF 'HIGH SPEED RAIL' AT A BROAD LEVEL. RECENT PRESS COVERAGE HAS PROBABLY AIDED AWARENESS CONSIDERABLY ALTHOUGH SOME CONFUSION MAY STILL EXIST AS TO WHAT IS THE EXACT DEFINITION OF HIGH SPEED RAIL AS EXEMPLIFIED IN THE QUALITATIVE FINDINGS.**

## HSR : How does awareness differ?



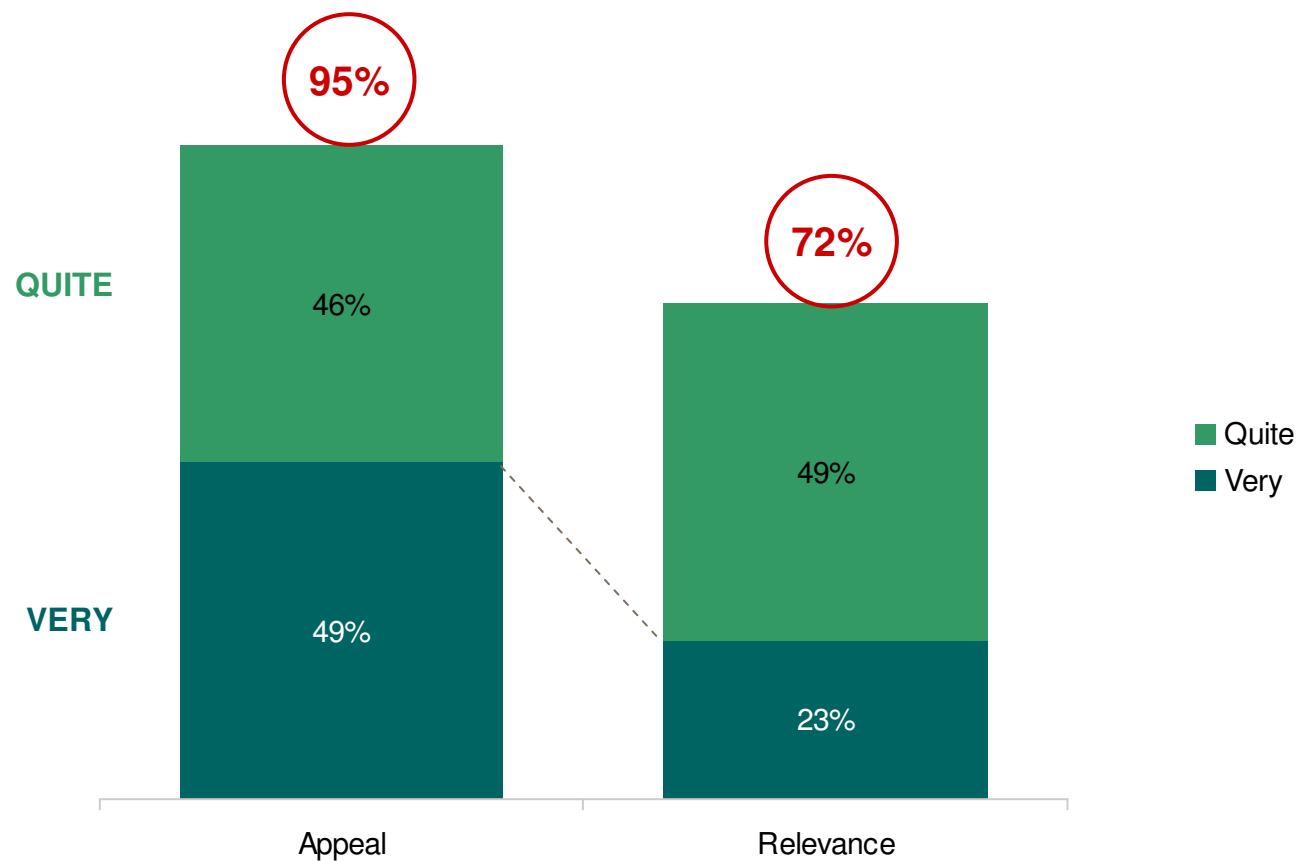
BASE: TOTAL n=1008

SIGNIFICANT SKEW

DIRECTIONAL SKEW

**GREATER AWARENESS AMONGST MALE PROFESSIONALS, BUT OVER HALF THE SAMPLE HAD SOME IDEA OF HSR, WITH ONLY YOUNGER FEMALES FROM LOWER SEG BEING UNAWARE**

## HSR Concept : Appeal and Relevance

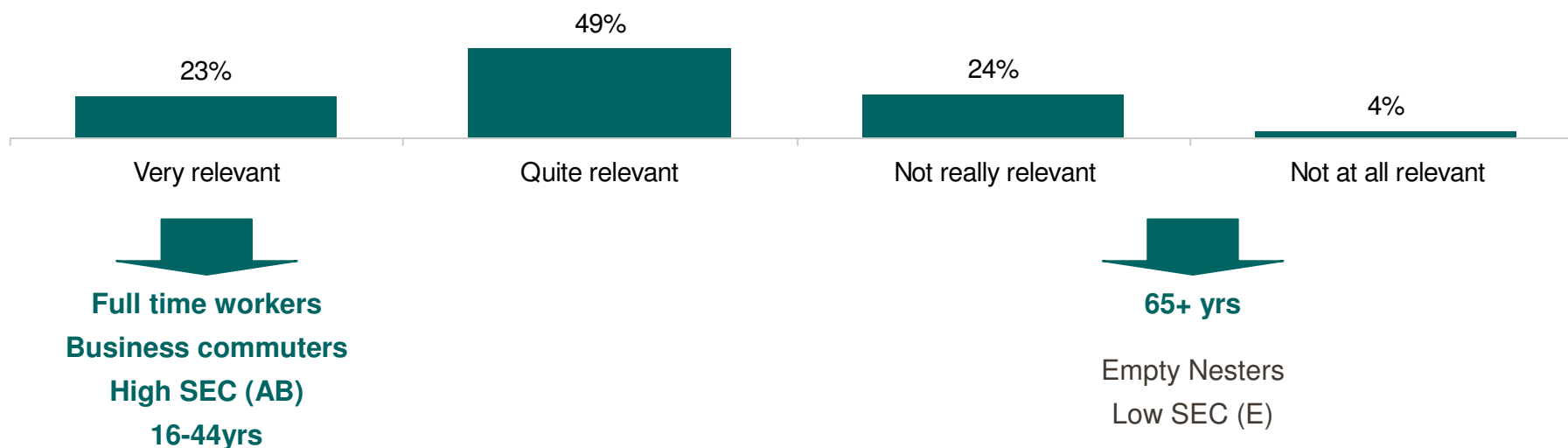


BASE: TOTAL n=1008

**ALTHOUGH STRONG TOP BOX SCORES SHOW HIGH LEVEL OF APPEAL, RELEVANCE IS MORE MUTED.**

## HSR Concept : Who finds it relevant?

### BROAD POPULATION...



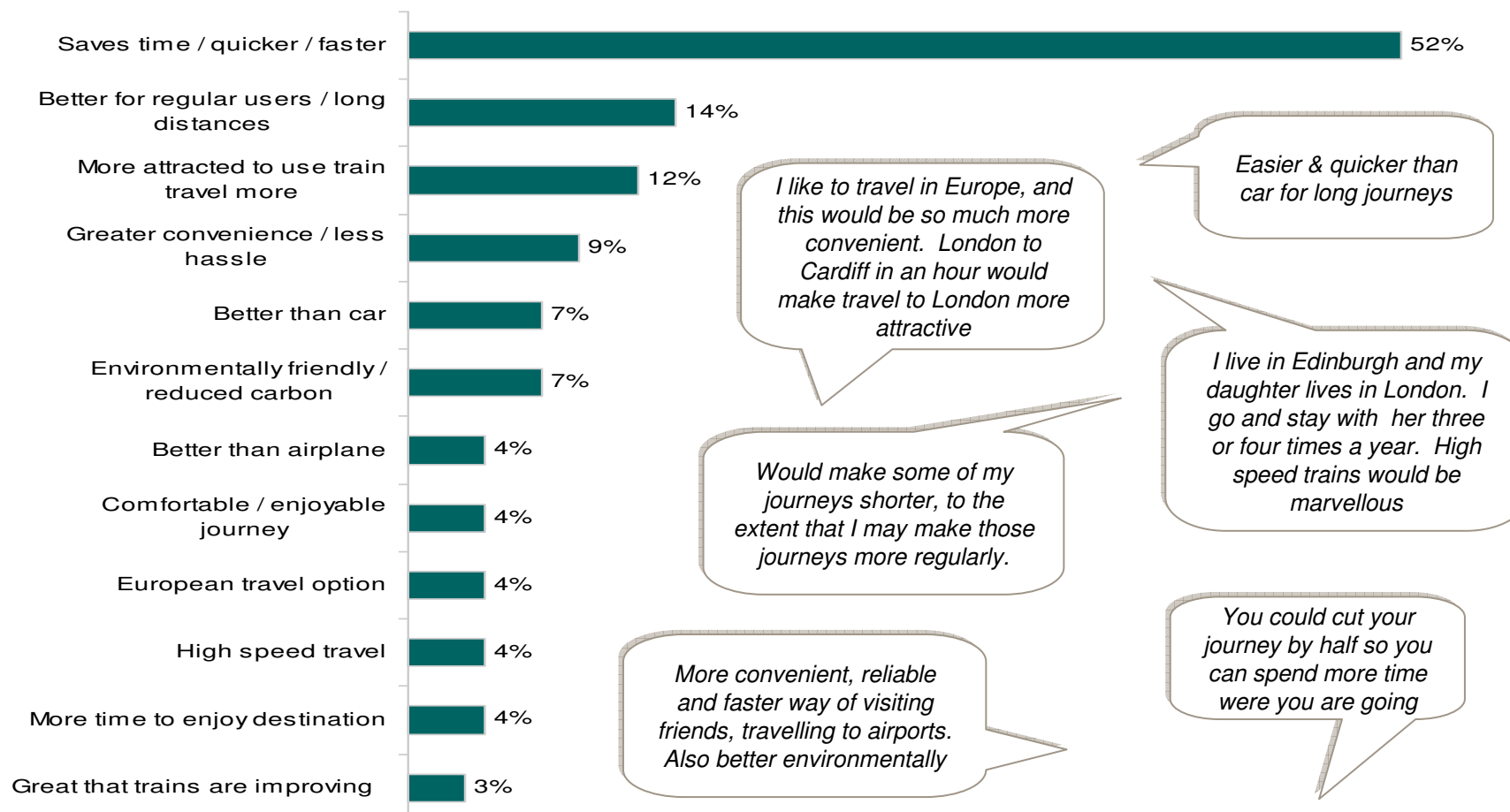
BASE: TOTAL n=1008

**SIGNIFICANT SKEW**

**DIRECTIONAL SKEW**

**EXTENT OF RELEVANCE BECOMES MORE FOCUSED ON BUSINESS TRAVELLERS IN HIGH SEC.**

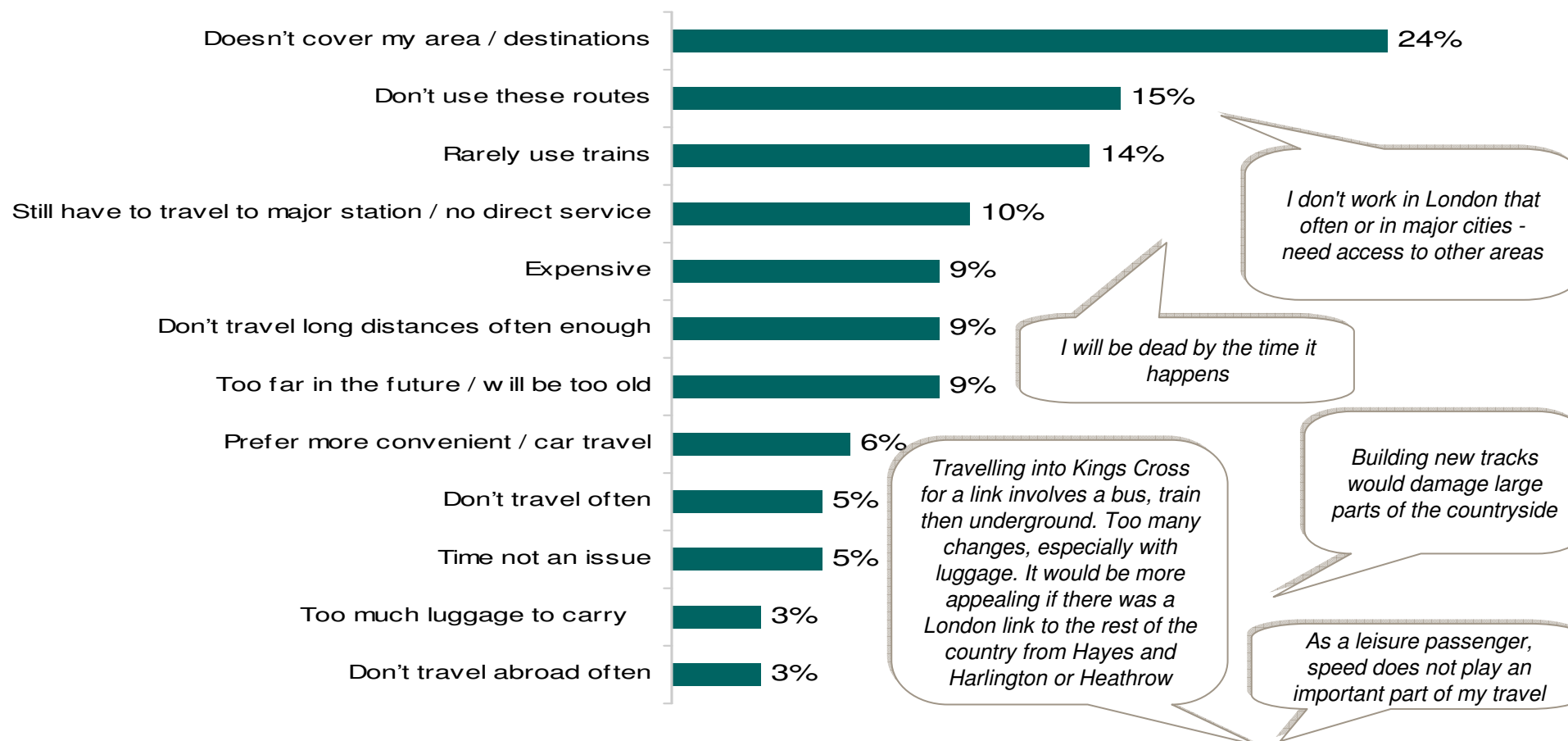
## Key Reasons for Relevance



BASE: TOTAL SAMPLE N=1008. OPEN-ENDED QUESTION

**SAVING TIME AND QUICKER JOURNEYS OVER LONG DISTANCE ROUTES ARE KEY TO DRIVING RELEVANCE AND INCREASED APPEAL OF USING THE TRAIN. ENVIRONMENTAL CONCERNS ARE BEING CITED AS A REASON FOR RELEVANCE ALBEIT IN A MINIMAL WAY CURRENTLY.**

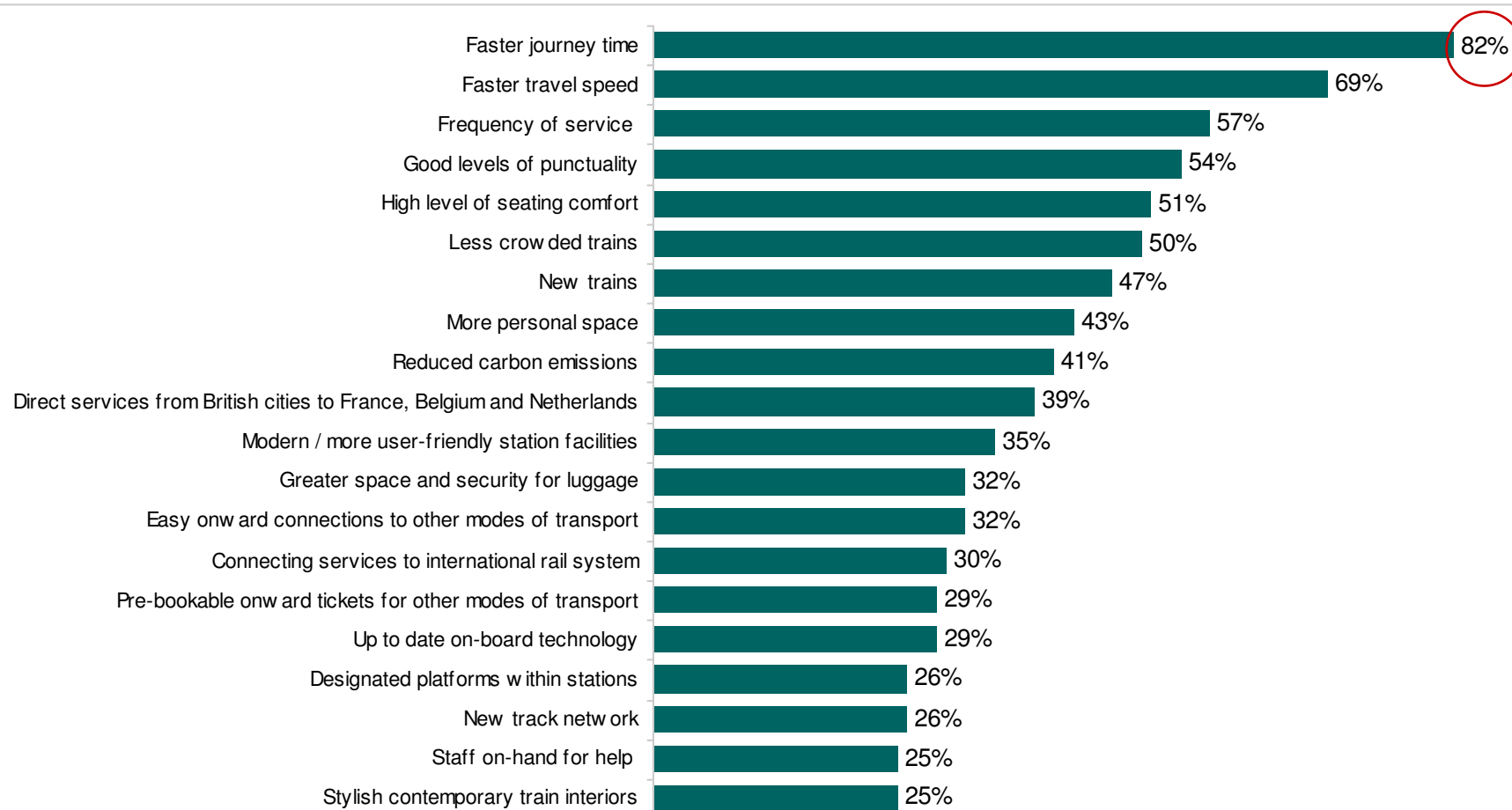
## Key Barriers to Relevance



BASE: TOTAL SAMPLE N=1008 OPEN-ENDED QUESTION

**RELEVANCE HIGHLY DEPENDENT ON WHERE LIVE AND WHERE WANT TO GET TO.  
INFREQUENT USE OF TRAIN OR LONG DISTANCE TRAVEL COMPOUND THESE  
BARRIERS TO RELEVANCE.**

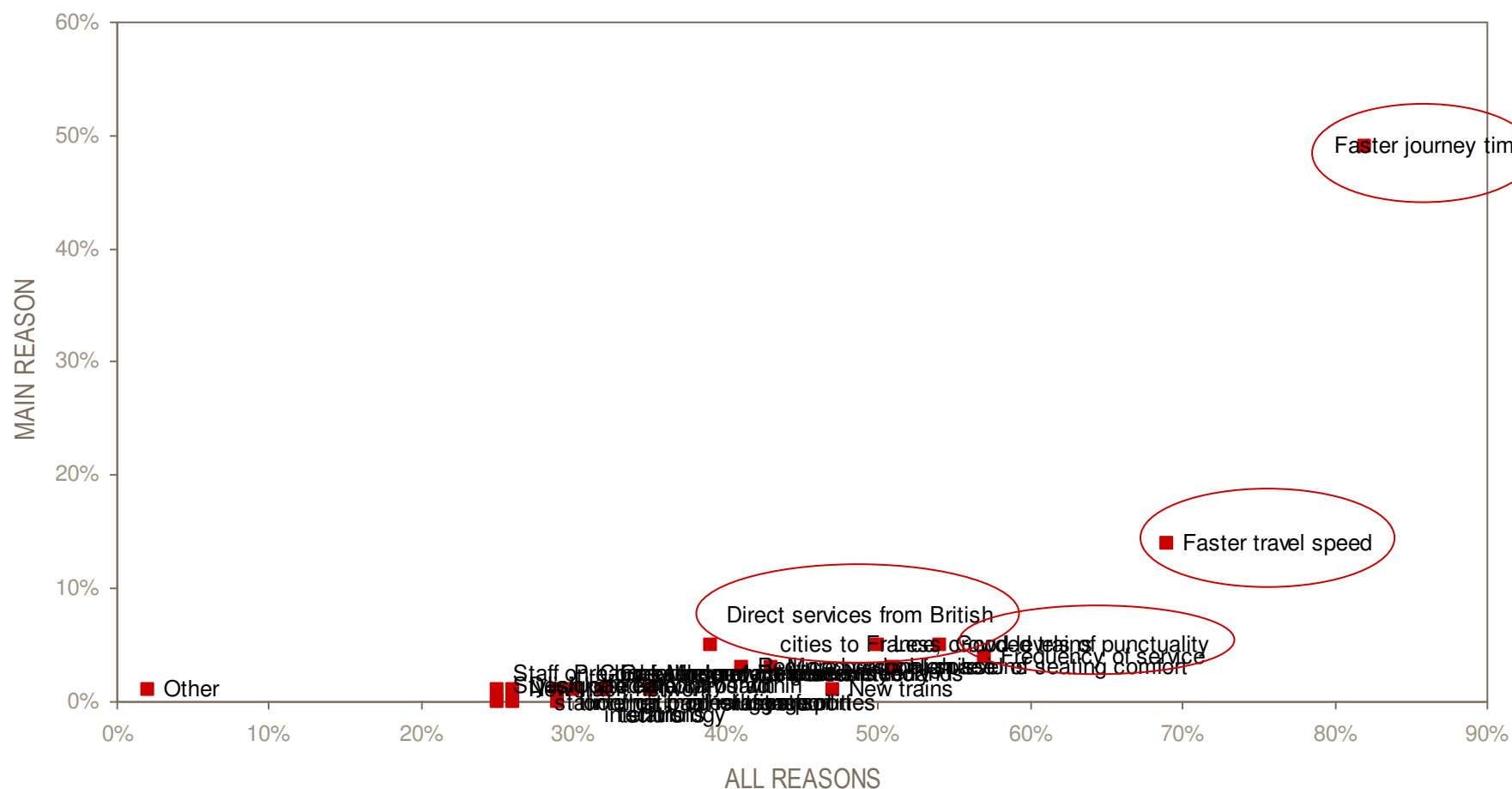
## HSR Concept : Overview of aspects of appeal



BASE: TOTAL SAMPLE N=1008 MULTIPLE CHOICE ANSWER

**STRENGTH OF APPEAL CLEARLY BASED ON SPEED BENEFIT PARTICULARLY IN TERMS OF REDUCING JOURNEY TIMES. INTERESTINGLY DIRECT SERVICES TO INTERNATIONAL DESTINATIONS IS NOT AS STRONG A HOOK OF APPEAL AS MIGHT HAVE BEEN ANTICIPATED FROM THE QUAL FINDINGS**

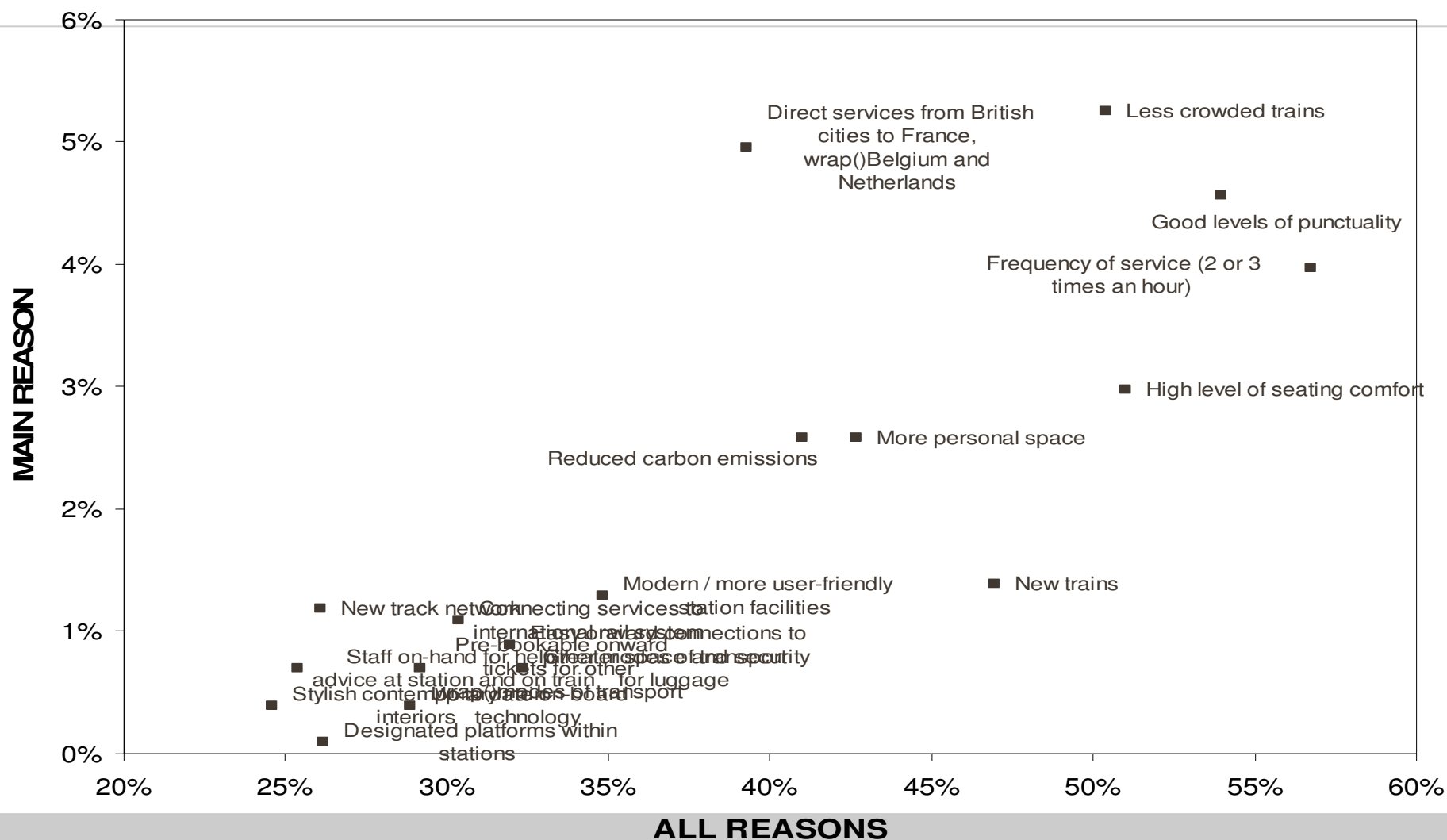
## HSR Concept : Highlights of preferences



**HOWEVER THE DIRECT LINK TO EUROPEAN CITIES DOES BECOME A STRONGER MAGNET OF APPEAL, AS DOES IMPROVED PUNCTUALITY WHEN LOOKING AT MAIN REASON SELECTION**

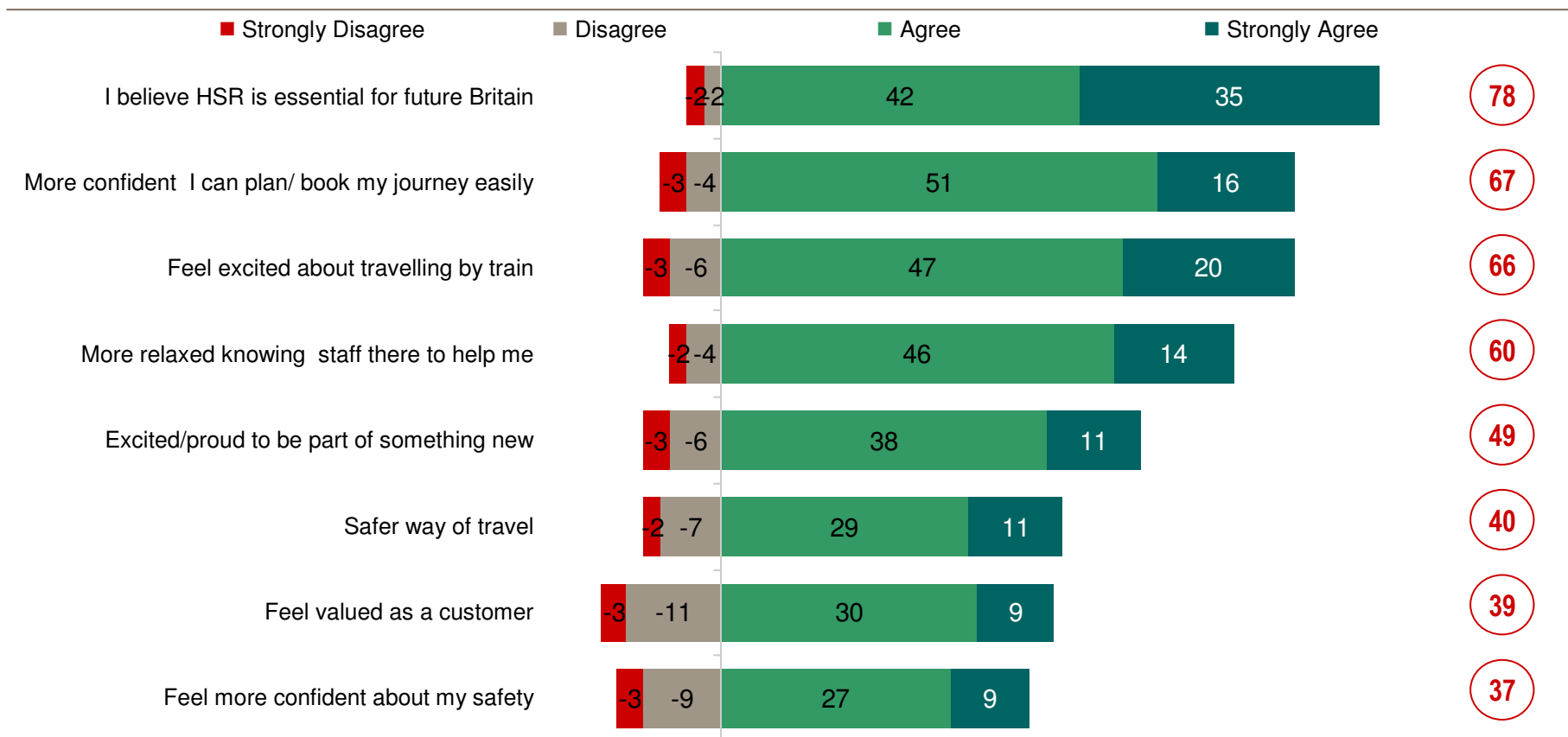


## HSR Concept : Highlights of preferences – in detail



**ADDITIONAL FACTORS SCORE VERY LOW IN TERMS OF IMPORTANCE AS A MAIN REASON FOR INTEREST IN THE HSR CONCEPT.**

## HSR Concept : Over-arching Benefit

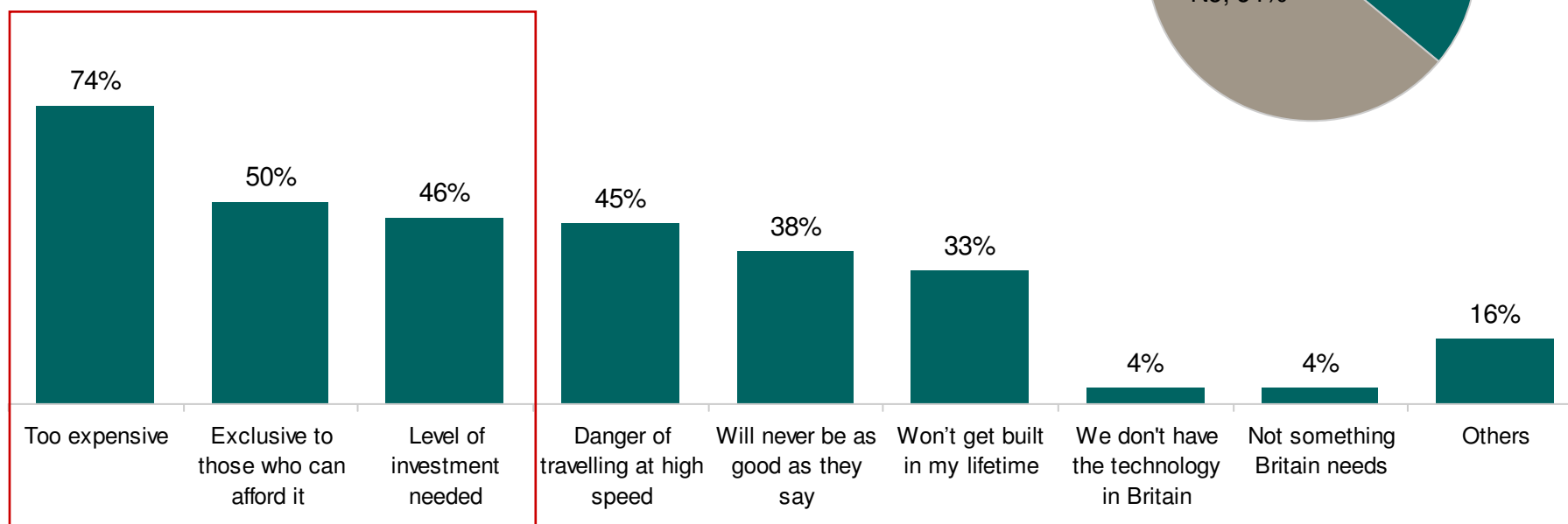


BASE: TOTAL N=1008

**CLEAR ILLUSTRATION OF THE NEED FOR AN HSR NETWORK FOR BRITAIN AND EMPOWERING TRAVELLERS TO BOTH PLAN MORE EASILY AND FEEL EXCITED ABOUT THEIR JOURNEY ARE STRONG MOTIVATING FACTORS**

## HSR Concept : Concerns

### ANY CONCERNS ABOUT THE IDEA OF A HSR?



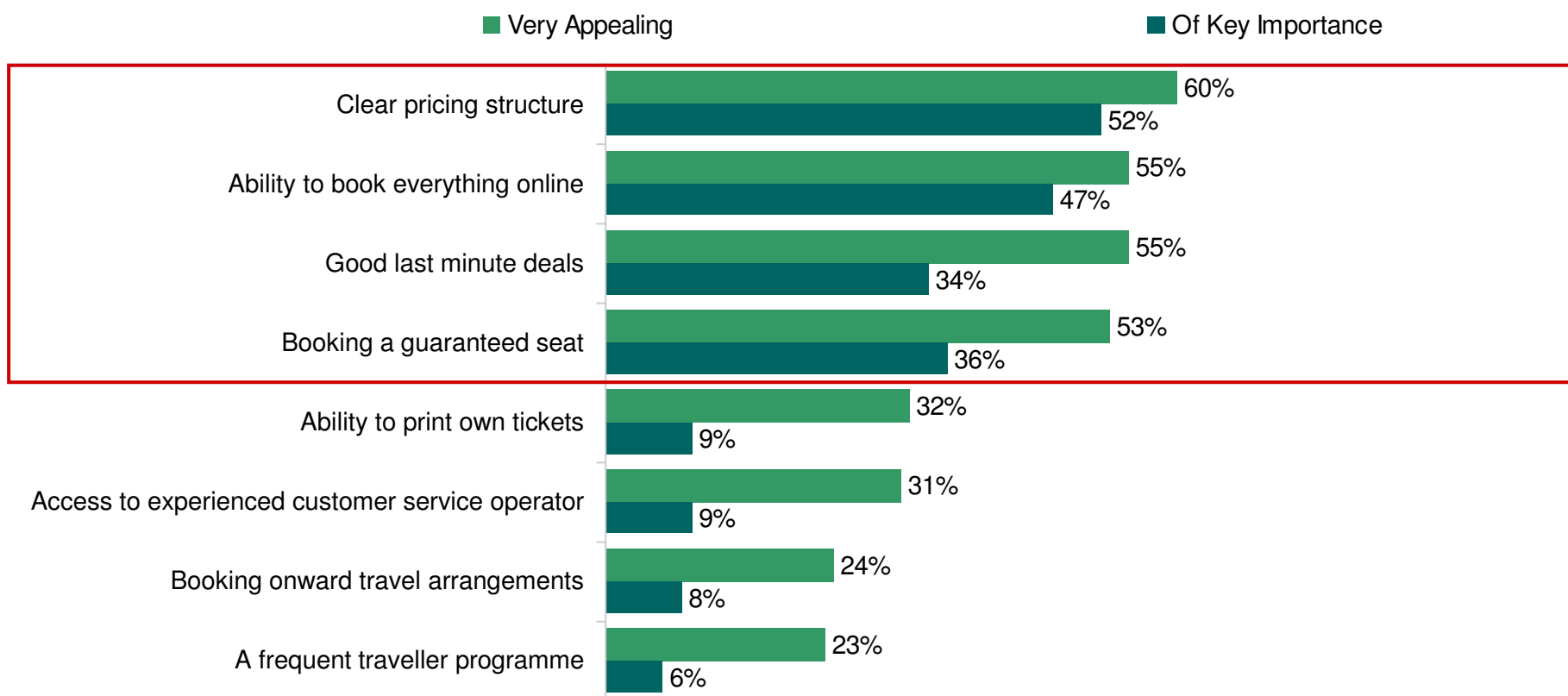
BASE: TOTAL n=1008

**HIGHEST CONCERN IS EXPENSE, BUT ALSO INDICATION OF SOME SAFETY ISSUES AND SCEPTICISM RE. HSR BEING BUILT TO EXPECTATIONS AND WITHIN A RELEVANT TIME FRAME FOR THE INDIVIDUAL, ECHO THE QUAL FINDINGS.**

## **RESEARCH HEADLINES**

- *Traveller profiling*
- *Focus on train travellers*
- *HSR awareness and concept evaluation*
- **HSR DELIVERY EXPECTATIONS**
- *Optimizing future use of HSR via positioning*
- *Appendix*

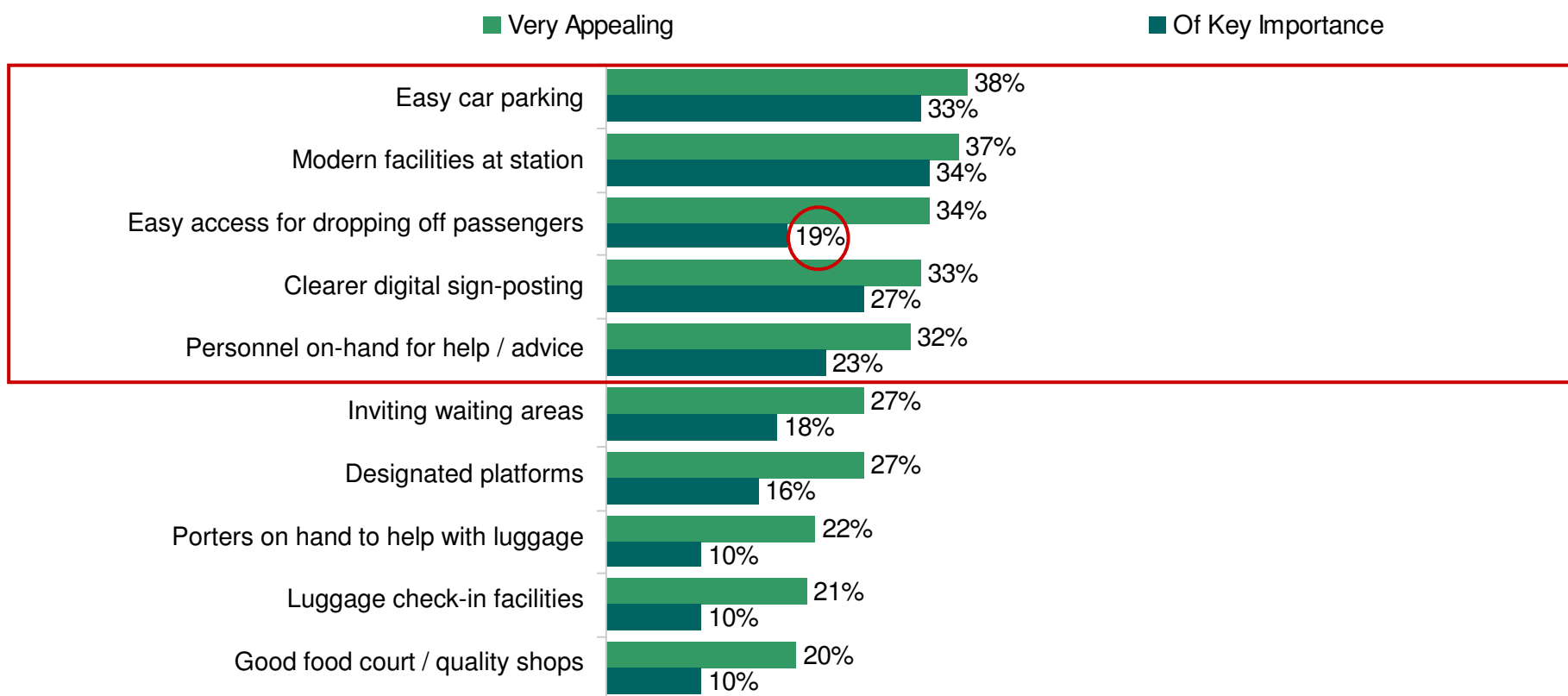
# HSR Delivery Expectations : Planning Your Journey



BASE: TOTAL N=1008

**KEY IMPORTANCE SCORES CLEARLY SHOW THAT CLARITY OF PRICING, ONLINE BOOKING, GUARANTEED SEAT AND GOOD LAST MINUTE DEALS ARE ESSENTIAL FEATURES TO APPEAL IN ORDER TO OVERCOME CURRENT AREAS OF PARTICULAR DISSATISFACTION WITH TRAIN TRAVEL**

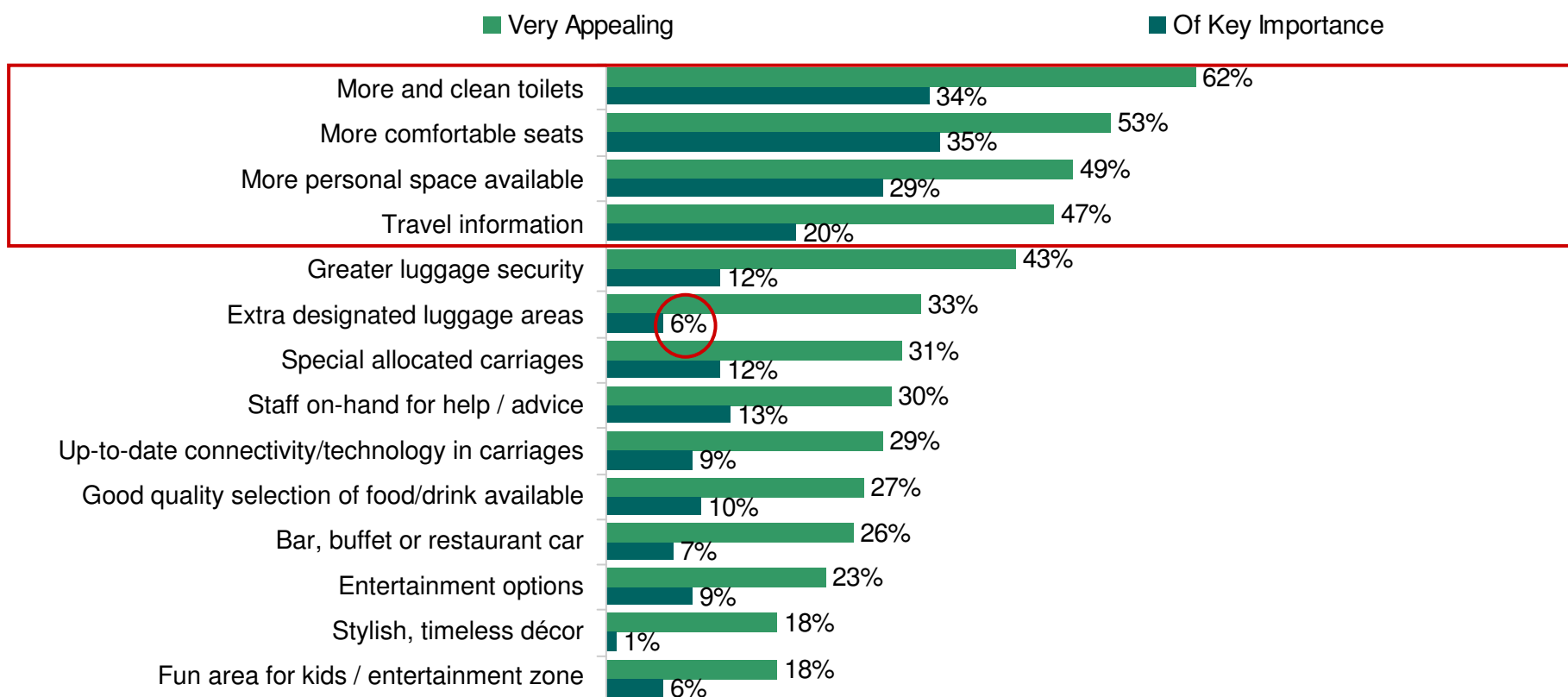
# HSR Delivery Expectations : At The Station of Departure



BASE: TOTAL N=1008

**FUNCTIONAL FEATURES TO EASE THE ARRIVAL AT AND NAVIGATION THROUGH THE STATIONS ARE HIGH ON PRIORITY LIST, ALTHOUGH THE 'PERSONAL TOUCH' OF HAVING STAFF ON HAND ALSO REGARDED AS BEING OF PARTICULAR IMPORTANCE. ALTHOUGH OF HIGH APPEAL, EASE OF PASSENGER DROP DOES NOT SEEM TO BE JUDGED A CRITICAL ELEMENT OF IMPORTANCE.**

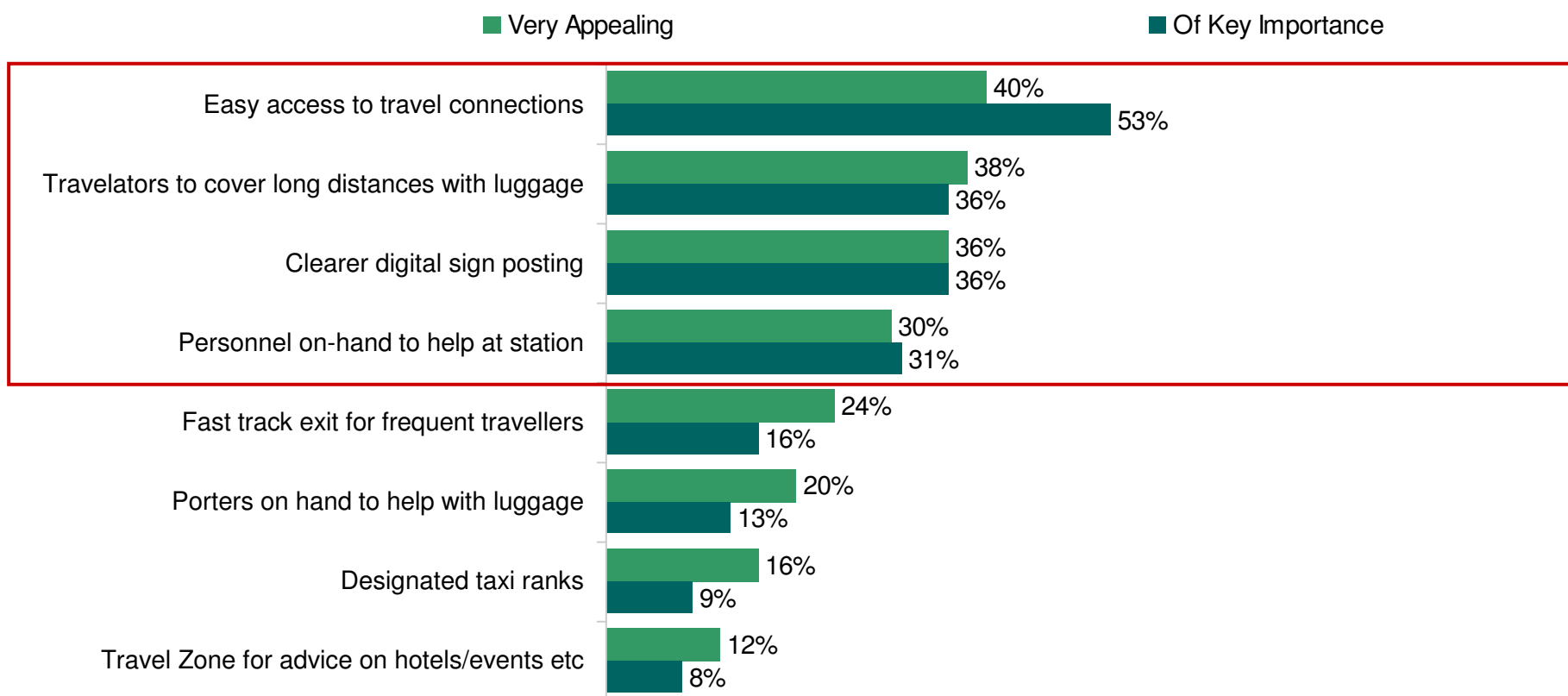
## HSR Delivery Expectations : On the Train



BASE: TOTAL N=1008

**CLEANLINESS OF TOILETS AND PERSONAL COMFORT RANK HIGH UP, WITH TRAVEL INFORMATION BEING A KEY REQUIREMENT ON-BOARD. LUGGAGE FEATURES ALTHOUGH SEEN AS APPEALING, ARE DEEMED LESS IMPORTANT IN COMPARISON.**

## HSR Delivery Expectations : At the Station of Arrival



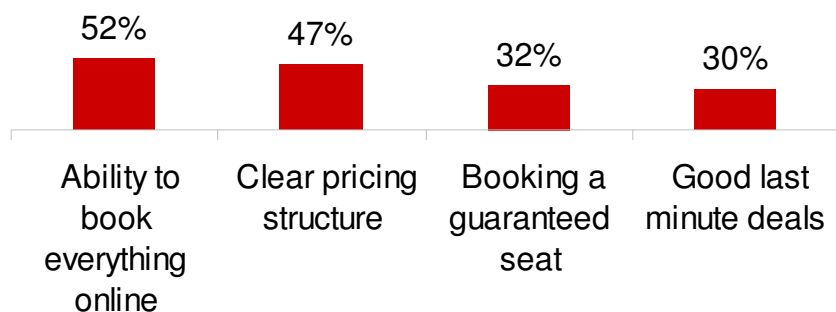
BASE: TOTAL N=1008

**CONNECTIVITY IS OF CRITICAL IMPORTANCE AND ANY FEATURES WHICH HELP TO OPTIMIZE THIS ARE HIGHLY RATED. PERSONNEL ON HAND AT STATION OF DESTINATION BECOMES A HIGHER ORDER PRIORITY THAN THAT OF DEPARTURE.**

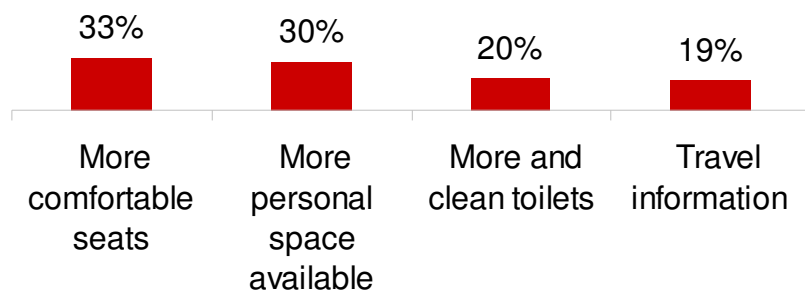


## Business travellers

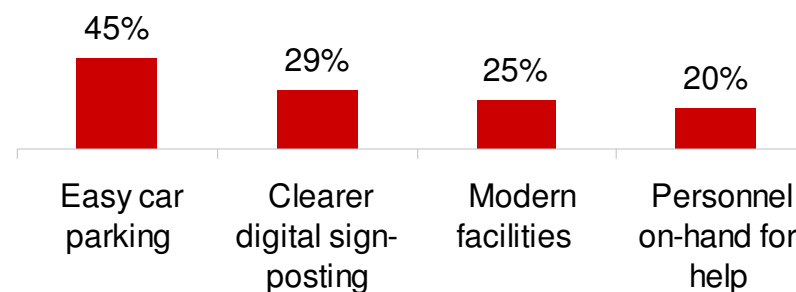
### Planning the Journey



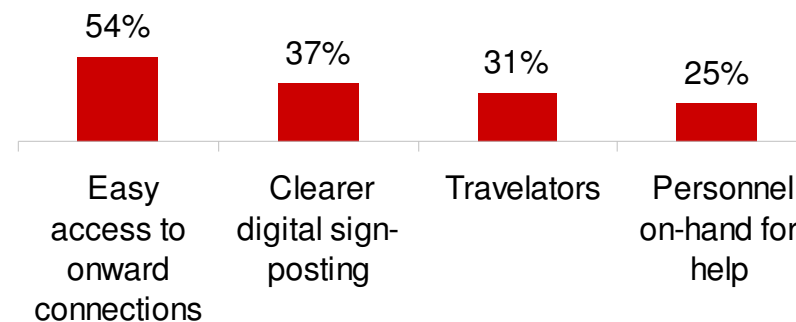
### On the Train



### Station of Departure



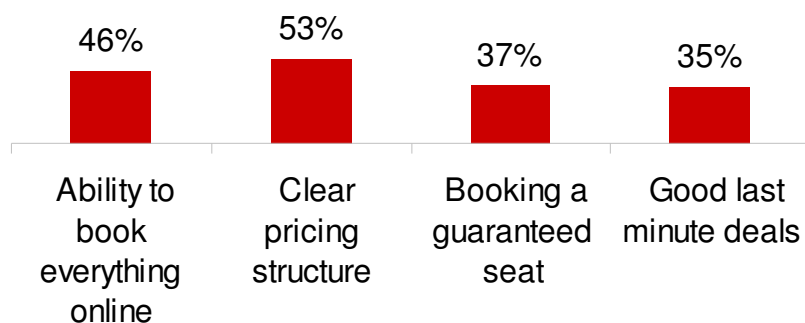
### Station of Arrival



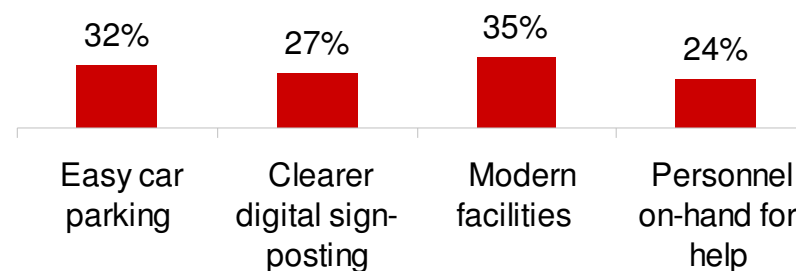
BASE: BUSINESS TRAVELLERS TOP BENEFITS N=142

## Leisure travellers

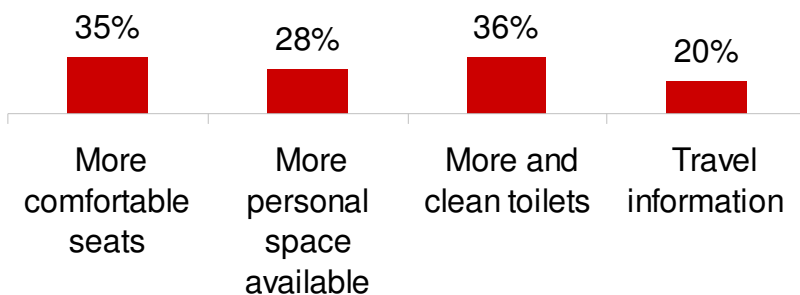
### Planning the Journey



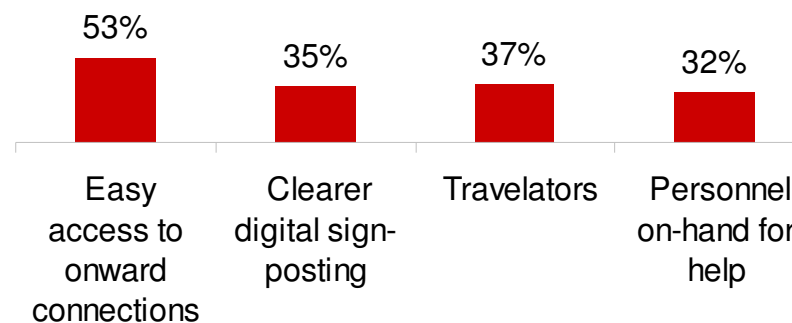
### Station of Departure



### On the Train



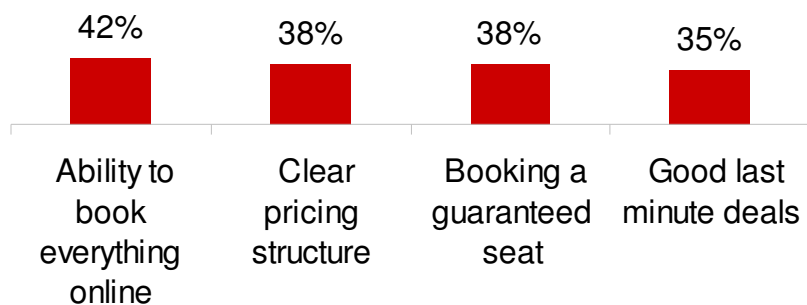
### Station of Arrival



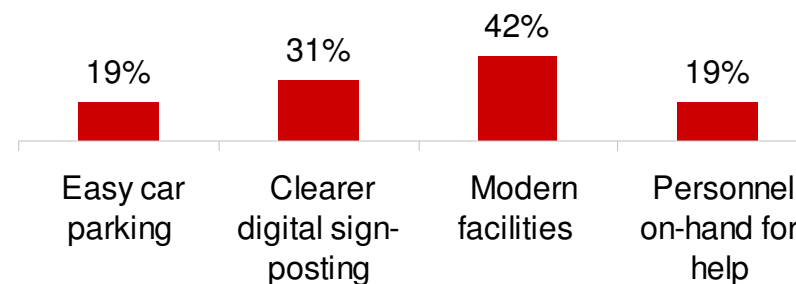
BASE: LEISURE TRAVELLERS TOP BENEFITS N=840

## Commuter travellers

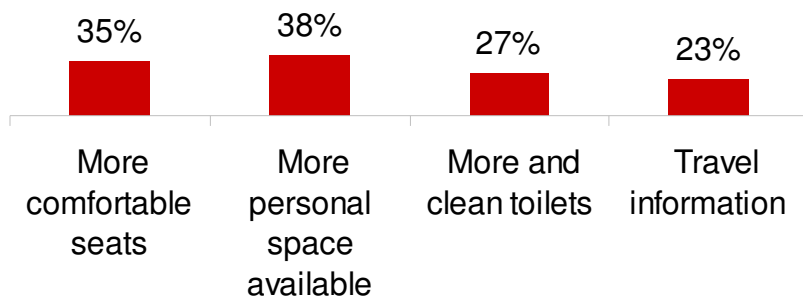
### Planning the Journey



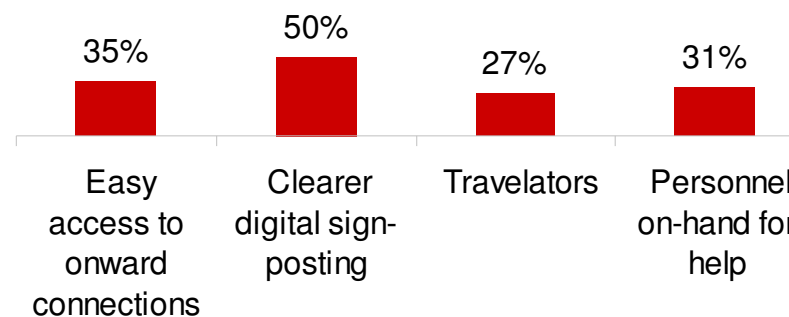
### Station of Departure



### On the Train

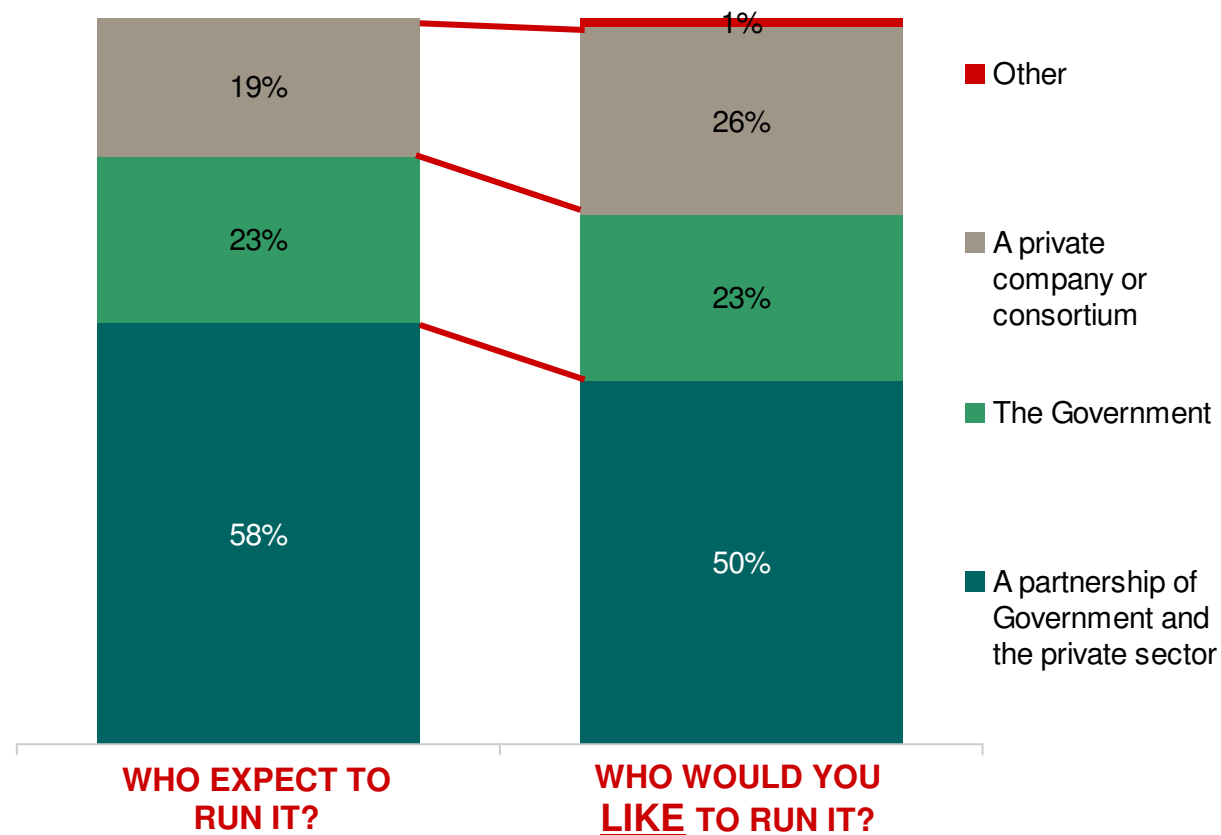


### Station of Arrival



BASE: COMMUTER TRAVELLERS TOP BENEFITS N=26 \*CAUTION SMALL BASE SIZE

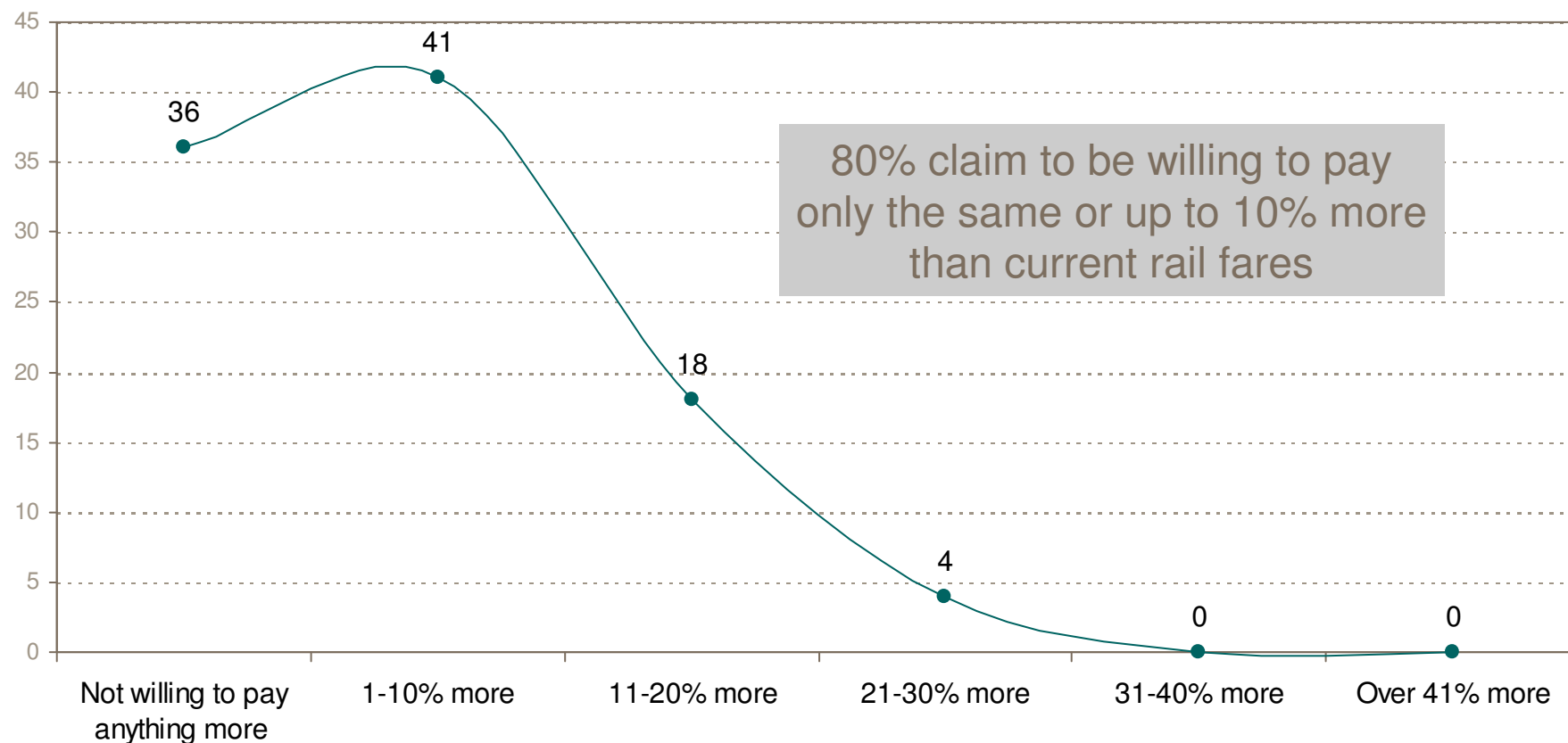
## HSR Delivery Expectations : Who would run the service?



BASE: TOTAL n=1008

**PARTNERSHIP OF GOVERNMENT AND PRIVATE SECTOR SEEMS TO BE BOTH THE EXPECTED AND DESIRED SOLUTION TO WHOM SHOULD RUN THE SERVICE, ALTHOUGH POTENTIALLY BASED ON EXPERIENCE TO DATE.**

## Price Issue : Willingness to pay more (claimed)



**WILLINGNESS TO PAY A HIGHER PRICE IS DISAPPOINTING BUT THIS IS LIKELY TO BE HEAVILY INFLUENCED ON COST BEING A MAJOR DRIVER OF DISSATISFACTION CURRENTLY, AND POTENTIALLY ALSO BY REALITY OF IT BEING BUILT OR FOR FEAR OF INVESTMENT COST IMPACTING FURTHER ON LACK OF FUNDING FOR CURRENT RAIL SYSTEM**

## Price Issue : Who is most likely to pay more?

**WILL PAY 21%+  
MORE**



**16-24yrs  
Families  
High SEC (esp. B)  
Working F/T  
Business traveller  
Commuters  
Wales**

**WON'T PAY  
21%+ MORE**



**55+yrs  
Empty Nesters  
Retired  
South East, South  
West and Scotland**

**NB: based on small base sizes**

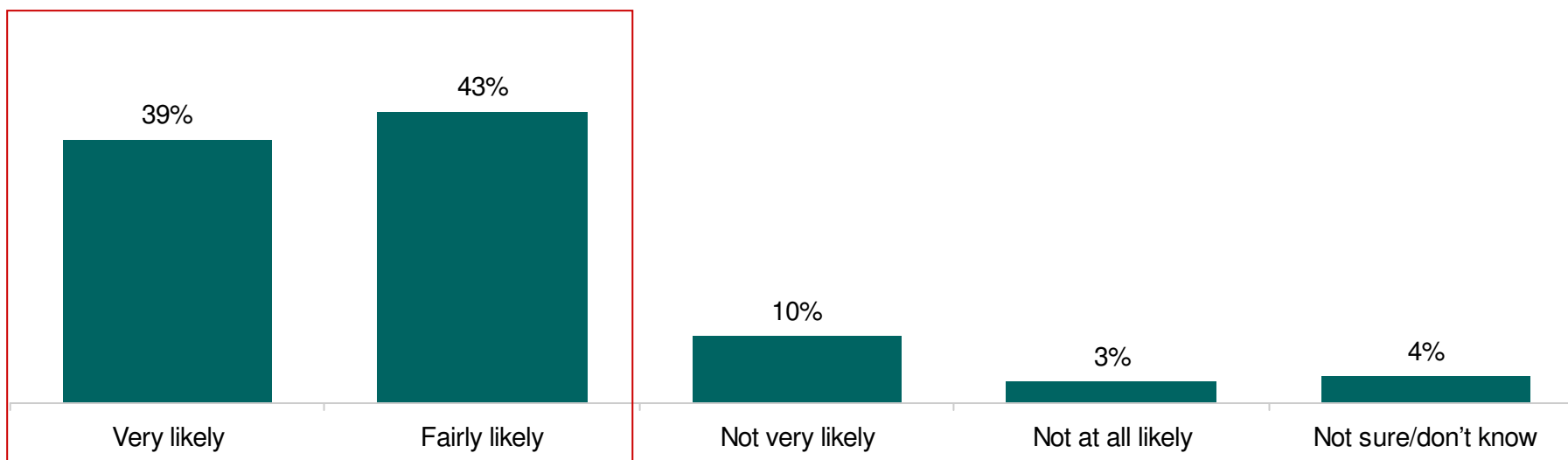
**SIGNIFICANT DIFFERENCES IN PREDISPOSITION TO PAY MORE ONLY REALLY EMERGE BEYOND THE 21%+ PRICE POINT, WHICH IS A STRONGER INDICATOR OF WHO THE CORE HSR TRAVELLERS ARE LIKELY TO BE IF A 20%+ OVER STANDARD FARE PRICE STRUCTURE IS INTRODUCED.**

## **RESEARCH HEADLINES**

- *Traveller Profiling*
- *Focus on train travellers*
- *HSR awareness and concept evaluation*
- *HSR delivery expectations*
- **OPTIMIZING FUTURE USE OF HSR VIA POSITIONING**
- *Appendix*

## HSR Future Usage: Overall

Top 2 Box  
Very/Fairly Likely  
82%

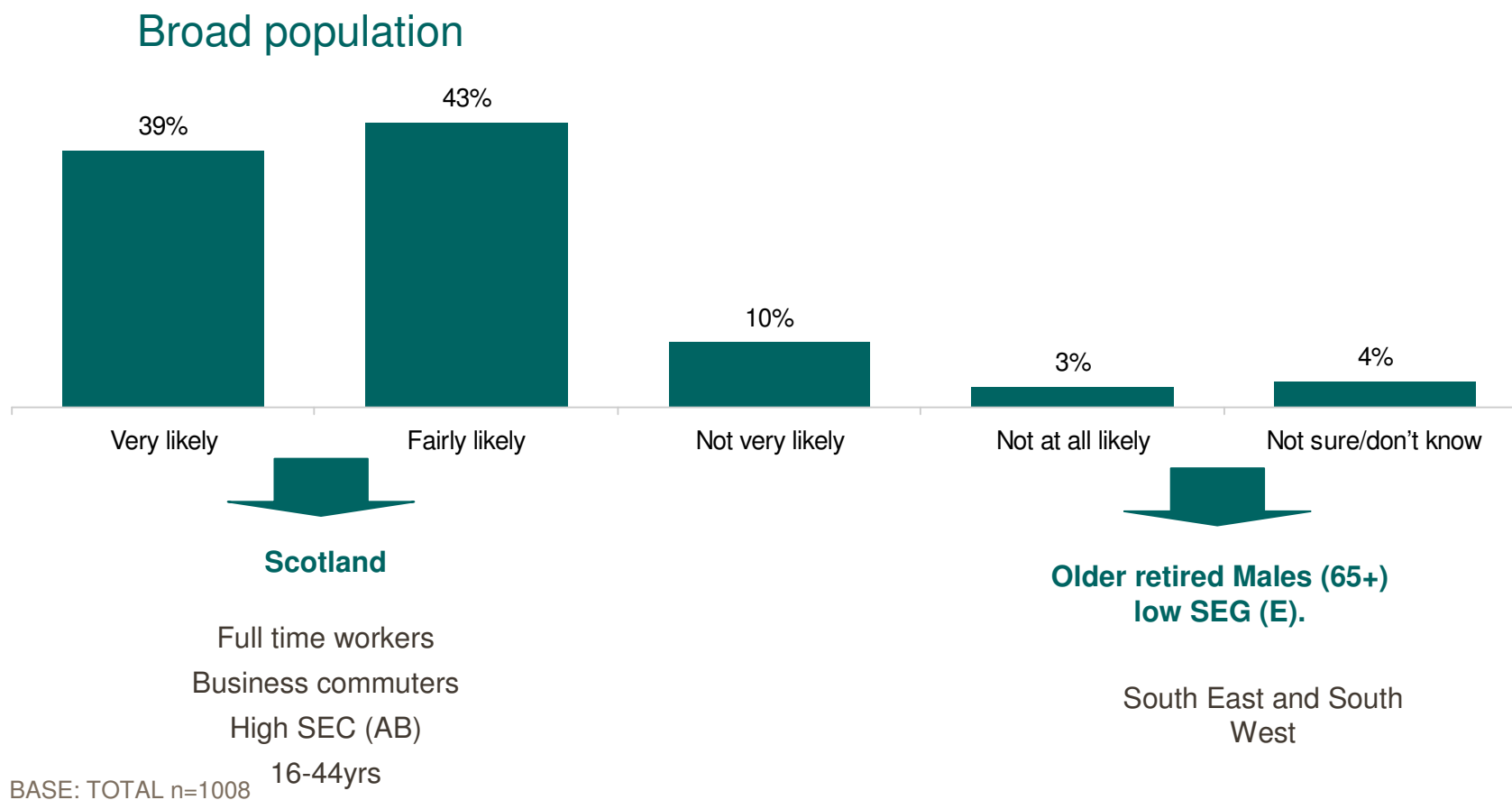


BASE: TOTAL n=1008

**ENCOURAGING MAJORITY WOULD BE LIKELY TO USE HSR IN FUTURE.**



## HSR Future Usage : Who is most likely to use it?



**SIGNIFICANT SKEW**

**DIRECTIONAL SKEW**

**UNSUPRISINGLY GIVEN CONCERNS RE. EXPENSE AND TIME-FRAME, THOSE MOST PREDISPOSED TO USING ARE THE MORE AFFLUENT, BUSINESS TRAVELLERS AND THOSE YOUNG ENOUGH TO BE ABLE TO MAKE USE OF IT.**

# HSR Positioning Concepts shown

### THE GREEN MACHINE

The new High Speed Rail network has been designed specifically with the environment in mind. The new streamlined shape of the train, its high capacity and the fact it runs on electricity, means that carbon emissions are significantly reduced. As electricity generation shifts towards green sources, the environmental benefits become even greater.

Over similar distances, the new High Speed Trains will produce a third of the carbon emissions of a car and a quarter of those from air travel, therefore helping to minimize the environmental damage of every journey you take and ensure you keep enjoying the wonderful views outside the train window.

In High Speed Rail's commitment to be known as the 'green machine', it will also continuously look at ways to be more energy efficient, reduce waste and recycle as much as possible and look to source the most environmentally conscious products.

**High Speed Rail – doing its bit for the environment**




### HASSLE-FREE FROM A TO C

When you want a fast, smooth journey and don't want to leave things to chance, the new High Speed Rail network promises to deliver all this at the click of a button.

From offering you the facility to pre-book your favourite seat on-board, to tickets for your onward journey or a great deal at a hotel, and travel straight through to Europe, the new High Speed Rail network makes it easier to ensure a seamless journey from start to finish.

And with ultra comfortable seats, lots of high tech options on board and at the station to meet all your travel needs, you'll be sure to have an enjoyable, hassle-free journey whether you're a business traveller, going off for the weekend or departing on a family holiday.

**With High Speed Rail we deliver a seamless travel solution .... all the way**



### HIGH TECH TRAVEL

The new aerodynamically shaped High Speed Rail trains are crammed full of the latest technology to make your journey an awe-inspiring experience.

From brand new tracks, to the sense of travelling at 200mph and getting on and off the train in modernized stations with all the best in terms of facilities and digital signage, you really feel like you've been fast-tracked into the future.

**High Speed Rail - futuristic travel at its best**



### TRAIN TRAVEL WITH THE MAGIC TOUCH

The new High Speed Rail network promises an exciting and entirely new experience in train travel where everything has been created with the traveller's ultimate enjoyment in mind.

The super-sleek, ultra comfortable trains have been designed with specific travellers needs in mind, so you could settle yourself into a business carriage all set up with the latest technology or as a leisure traveller, enjoy the journey to the max via a range of facilities on board from entertainment options for kids to buffet cars and bars offering quality food and drinks.

And there'll be friendly and professional staff both on board and at the stations to help and advise you on any aspect of your journey.

**The new High Speed Rail network – puts the magic back into train travel**



### SAVE TIME TO MAKE TIME

By saving journey time by up to a half, the new High Speed Rail network gives you back the time to spend on what really matters to you and what you really want to spend time doing at your destination!

By being able to pre-book all your onward travel, the fact that you arrive city-centre and with easy connections to other modes of transport for your onward journey means you don't lose a minute of your precious time.






You can also make the most of your time on board as these ultra-modern trains offer you the chance to tap into lots of entertainment options, connect up to the latest technology on offer, enjoy a few drinks with friends or a restful nap in the plush, reclineable seats.

As the new High Speed Rail network also connects into the international rail system, you can both save time and have the time of your life by connecting directly to major cities in Europe.

**High Speed Rail - gives you back your precious time**

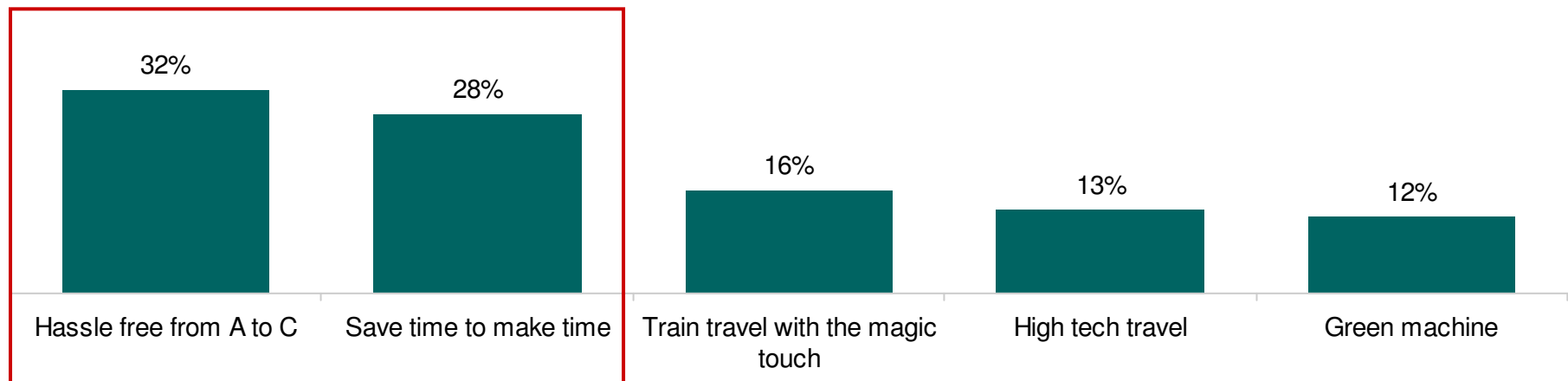


## HSR Positioning Direction : Ranking of Positionings

	SAVE TIME TO MAKE TIME	THE GREEN MACHINE	HASSLE FREE	MAGIC TOUCH	HIGH TECH
					
APPEAL (Very)	37%	35%	35%	35%	33%
RELEVANCE (Very)	24%	25%	23%	21%	21%
UNIQUENESS (Very)	22%	22%	20%	26%	25%

**GOOD APPEAL ACROSS ALL POSITIONING CONCEPTS AT TOP BOX WITH  
RELATIVELY LOW DIFFERENTIATION BETWEEN THEM.**

## HSR Positioning Direction : Which positioning would most influence usage?



BASE: TOTAL n=1008

**THE TWO PLATFORMS MOST LIKELY TO INFLUENCE USAGE ARE 'HASSLE FREE FROM A TO C' AND 'SAVE TIME TO MAKE TIME' WHICH REINFORCES QUAL FINDINGS OF THE KEY BENEFIT OF GREATEST INTEREST TO TRAVELLERS.**



## HSR Positioning Direction : Who finds these most influential?



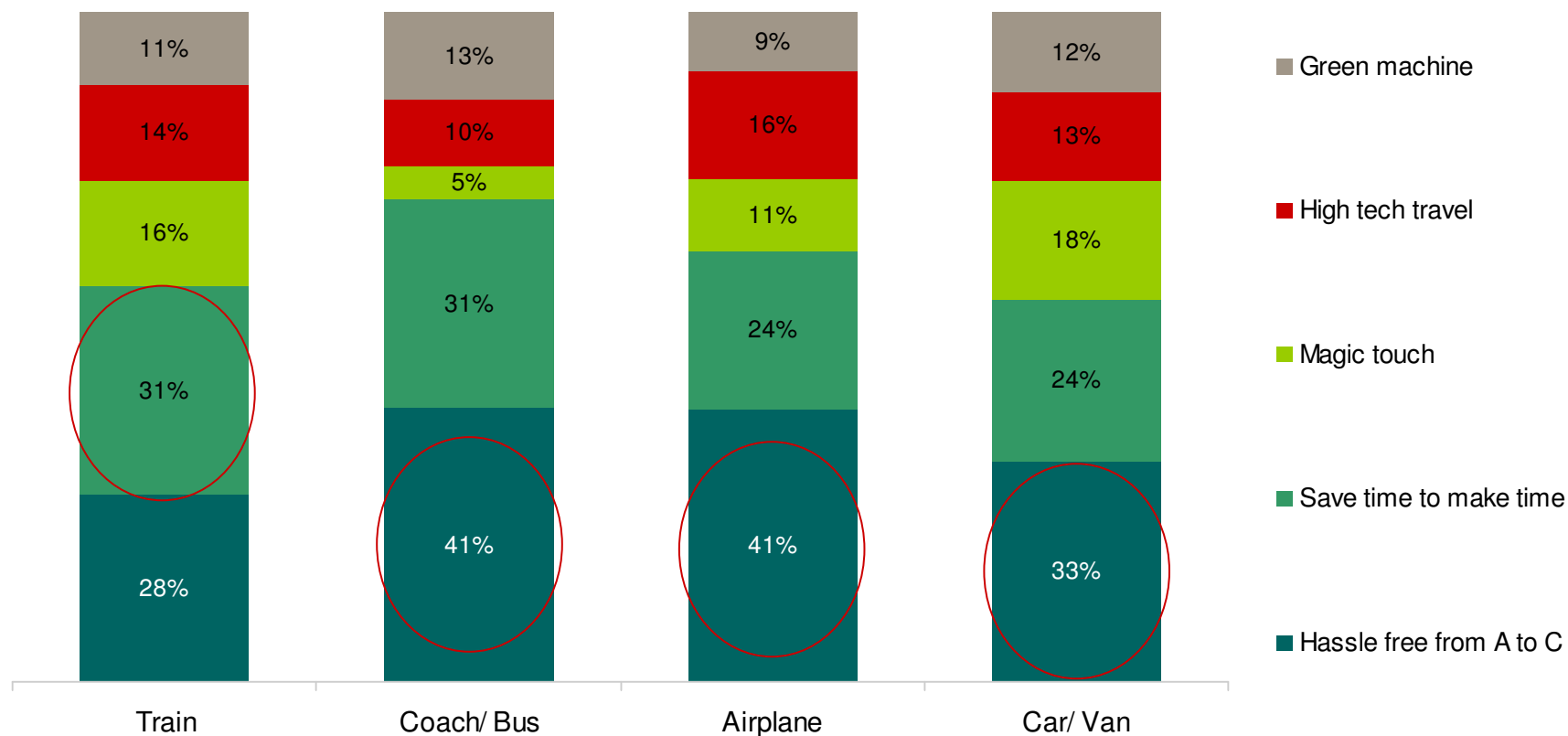
BASE: TOTAL n=1008

SIGNIFICANT SKEW

DIRECTIONAL SKEW

**HASSLE-FREE SEEMS TO HAVE POLARISED APPEAL FOR OLDER VS YOUNGER TRAVELLERS, WHILST HIGH TECH TRAVEL STRIKES A STRONGER CORD WITH MALE S/DINKS (SINGLE INCOME NO KIDS/ DOUBLE INCOME NO KIDS)**

## HSR Positioning Direction : What is their current preferred mode of transport?



BASE: Total n=1008. Preferred mode of transport. Train n=470, Car n=423, Plane n=76, Coach n=39\* Caution small base

**TRAIN TRAVELLERS PREFER 'SAVES TIME', WHILST 'HASSLE FREE' IS CLEAR PREFERENCE FOR OTHER MODES OF TRAVEL, HIGHLIGHTING THE OPPORTUNITY OF ENTICING MORE PEOPLE TO TRAVEL BY TRAIN VIA THIS POSITIONING ROUTE.**

# Recommendations

Traveller profiling highlights the opportunity to encourage more occasional travellers to take the train more often

Triggers to conversion lie in conveying a heightened sense of value-add from both a practical and emotional perspective, which HSR is well placed to deliver to, based on the following requisites:

*Providing clear price structures and more enticing deals to appeal to a broader range of travel occasion and traveller typologies – greater incentive to travel more often for more purposes*

*Offering a heightened sense of comfort and 'high tech' features to enhance sense of value for money – not just faster but better*

*Empowering travellers to plan whole journey more easily for a more enjoyable and stress-free journey experience from start to finish – less easy to default to car as the 'easy option' and more focus on the pleasure of train travel (relaxation)*

Although awareness of HSR is relatively high, lack of understanding and a dose of scepticism with regard to time-frames, network reach and cost implication are impacting on relevance.

*Further education and clarity around HSR offer are likely to enhance relevance and usage potential*

'Save time to Make time' has broadest overall appeal, with journey speed being the critical hook of interest, however elements of the 'Hassle-free from A to C' positioning focussing on connectivity and ease of journey planning seem to add a more differentiating angle to the offer and the environmental consideration as a support message will likely to become an even stronger support in the future.

The 'Magic touch' positioning also embodies the sense of excitement about a distinctive way of travel which would be useful to capture as tonal guidance for any communication development in order to enhance the appeal of HSR.