



Trains

The gateway to beyond London?

A global thought piece for VisitEngland

July 2016

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Welcome and thank you

Welcome to this thought piece on the role of rail in getting the inbound traveller beyond London, and into the rest of the country.

In recent years One Minute to Midnight, under its previous name of Olive Insight, has gone on a journey with VisitBritain and VisitEngland, exploring the inbound traveller to the UK. In that time we have conducted an extensive research programme that was designed to challenge thinking internally and externally about how to get the international traveller beyond London.

As part of this programme, transport accessibility was one of the components we investigated, and within this rail travel.

This research has taken us both far afield, to India, GCC, Brazil, India and the US, and a little closer to home to the Nordics, Germany & France.

This document is a summary of some of the findings that emerged across this programme specifically related to train travel.

A caveat is required before we proceed. Please bear in mind that this programme was not dedicated to looking at train travel. The train was one component of many within the mix. Having said this, the insights that emerge do hopefully shed some light on how important the train can be in getting the international traveller around the country and how we might optimise this moving forward.

We hope that you find it interesting and in some way useful. Should you have any further questions do not hesitate to contact Bigp@oneminutetomidnight.life

With warm regards

Big P
Human and Co-Founder
One Minute to Midnight

A close-up photograph of two children looking out a window. The child on the left is a young girl with blonde hair, wearing a red plaid shirt, with her hand near her mouth. The child on the right is a young girl with brown hair, wearing a pink plaid shirt, with her hand near her mouth. The window has dark vertical bars. The text "Prologue" and "The Sources" is overlaid on the left side of the image.

Prologue
The Sources

The insight provided in this document is based on two research programmes conducted for VisitBritain between 2013 and 2014. The programmes were tasked with exploring the levers and barriers to getting beyond London in markets across the globe. They were not dedicated railway explorations, although within the course of enquiry accessibility and transport were explored, and within these themes, rail travel was discussed.

Mature Markets “Beyond London” Exploration

The initial project was with the more mature markets of Norway, France, US and Germany. It was conducted in early 2013 and was a two phase project:

Phase 1 was a qualitative approach, which used 2 focus groups in each of US and France and 20 one to one telephone depth interviews in each of Norway and Germany to create some hypotheses to test.

Phase 2 was a quantitative online questionnaire of 20 minutes in length covering 840 respondents across the 4 markets that validated the hypotheses.

Across both phases the sample was evenly split between those who had been only to London and those that had been beyond London. All were in the market for international leisure travel.

Most of the coverage of this report will focus on this study.

Emerging Markets “Beyond London” Exploration

This project followed on from the first one and was conducted in late 2013 and early 2014. It covered GCC (KSA and UAE), India and Brazil. It followed a similar process and coverage

Phase 1 was a qualitative exploration of the emerging markets. 12 face-to-face depth interviews were conducted with international leisure travellers in all the markets in question, as well as 5 interviews with travel agents in GCC and Brazil.

Phase 2 was a quantitative validation process where 910 online interviews were conducted across the markets in question.

The sample for this programme was split evenly between those who had been to Britain before and those who had not.

Although the focus will be on the mature markets in the course of the report, we will also make mention of some of the insights coming through from the emerging markets where relevant.

Chapter 1 Why Trains?

NetworkRail

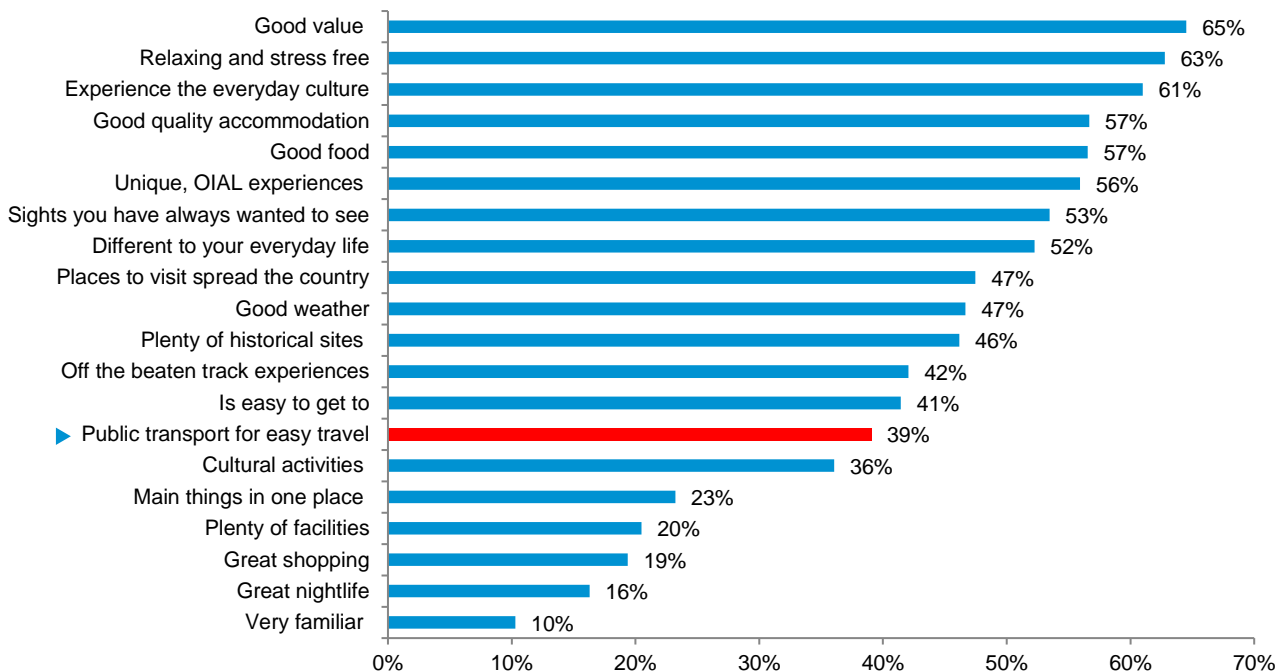
The Network Rail logo consists of the text "NetworkRail" in a blue, sans-serif font. Below the text is a stylized red arrow pointing to the right, composed of three overlapping triangular shapes of varying sizes.

From the research three big insights leapt out as to why trains can form an important part of the 'Beyond London' strategy moving forward:

- Trains are good for a travel destination
- Trains can educate
- Trains aren't scary

Trains are good for a travel destination

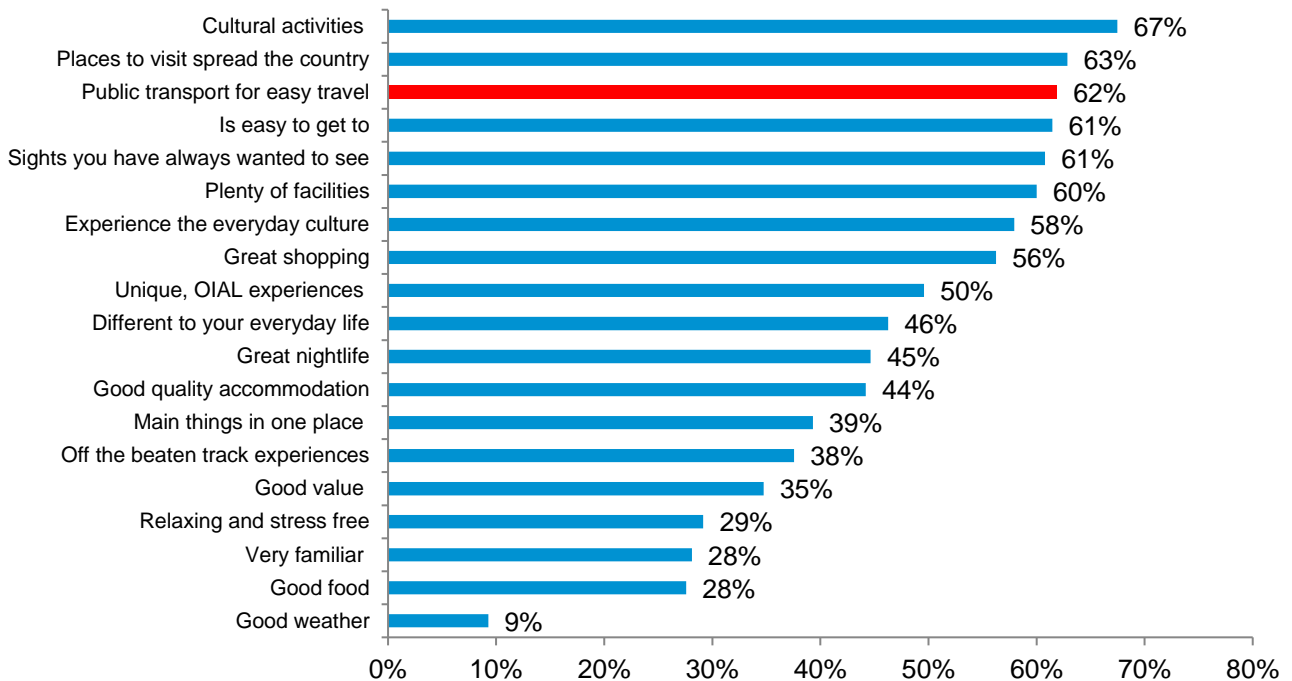
Let's first consider what role public transport has in terms of perceptions of a great holiday destination. As shown in the chart below, 40% across the mature markets think a *good public transport system* contributes significantly (top 2 box of 7) to a destination being great. That is more than 'Shopping'!



Source: Beyond London Mature Markets Study 2013.
 QA10 - Think now about what type of destination makes a great holiday.
 Base: Total sample, all markets, all holidays excluding GB (n=1290)

This was highest in Germany (45%) and the US (43%) and interestingly lowest in Norway at just over 30%.

If we then look at how our public transport performs among those who have travelled to Britain, we can see that over 60% agree (top 2 box) that the UK offers “public transport for easy travel” – one of the highest ranked attributes for this question.



Source: Beyond London Mature Markets Study 2013
 QB10 - Thinking about your trip to Great Britain, to what extent do you agree with the following
 Base: Total sample, all markets, all holidays taken in GB (n=840),

So, in short, those that have actually experienced public transport in the UK believe that it is an easy way to travel around the country. Again the US and Germany are little more positive (64% top 2 box) than Norway (61%) and France (57%) in this regard.

In addition, among those that have been to the UK from the mature markets but have not travelled beyond London, less than 10% agreed with the statement that "public transport in Great Britain is too bad to travel outside of London."

French consumers were slightly more negative about the transport system (14%) than the other markets – in Germany and Norway less than 5 % agreed with this statement. This negativity also emerged in the French qualitative groups, when a couple of criticisms were made, e.g.

"The trains were pretty dirty and really very, very expensive. I got one from London to Brighton on the South Coast." France Beyond London)

Broadly, the quantitative findings were very much supported qualitatively. In the in-depth face to face discussions most seemed to be fairly willing to use the public transport system, and expected it to run fairly well. Across most markets (both mature and emerging) the train dominates perceptions of the public transport system outside of London.

Indeed, in some of the emerging markets, the public transport system and in particular the trains in the UK seemed to be perceived very positively. In these markets, particularly Brazil, train travel in itself was attractive, and a majority of those in these markets envisaged using the train to travel around the UK.

"Here in Sao Paulo the few trains we have are a state. When I was in the UK I got the train to Bath with an Ecuadorian and a couple of Germans. It was as smooth as you like, amazing" Brazilian Beyond Londoner

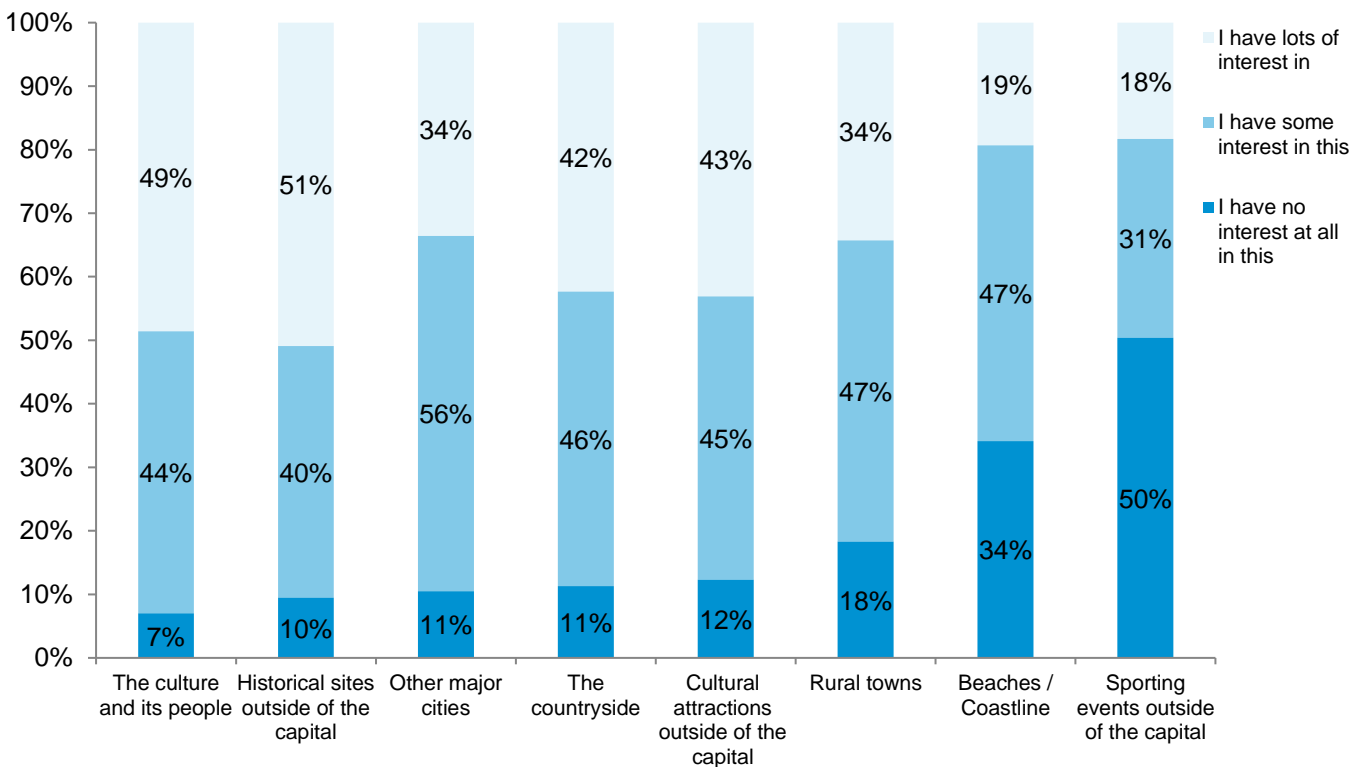
To sum up then, the idea of 'public transport making it easy to get around' and within this the train specifically, is something that is of high importance in contributing to a positive perception of a destination.

In general those that have experienced the UK public transport system consider it a real strength in the UK's offer, while negative perceptions of public transport do not seem to be a contributing reason for those who have not travelled outside of London. In short, trains are a real strength for the country and there is scope to leverage them more.

Trains can educate

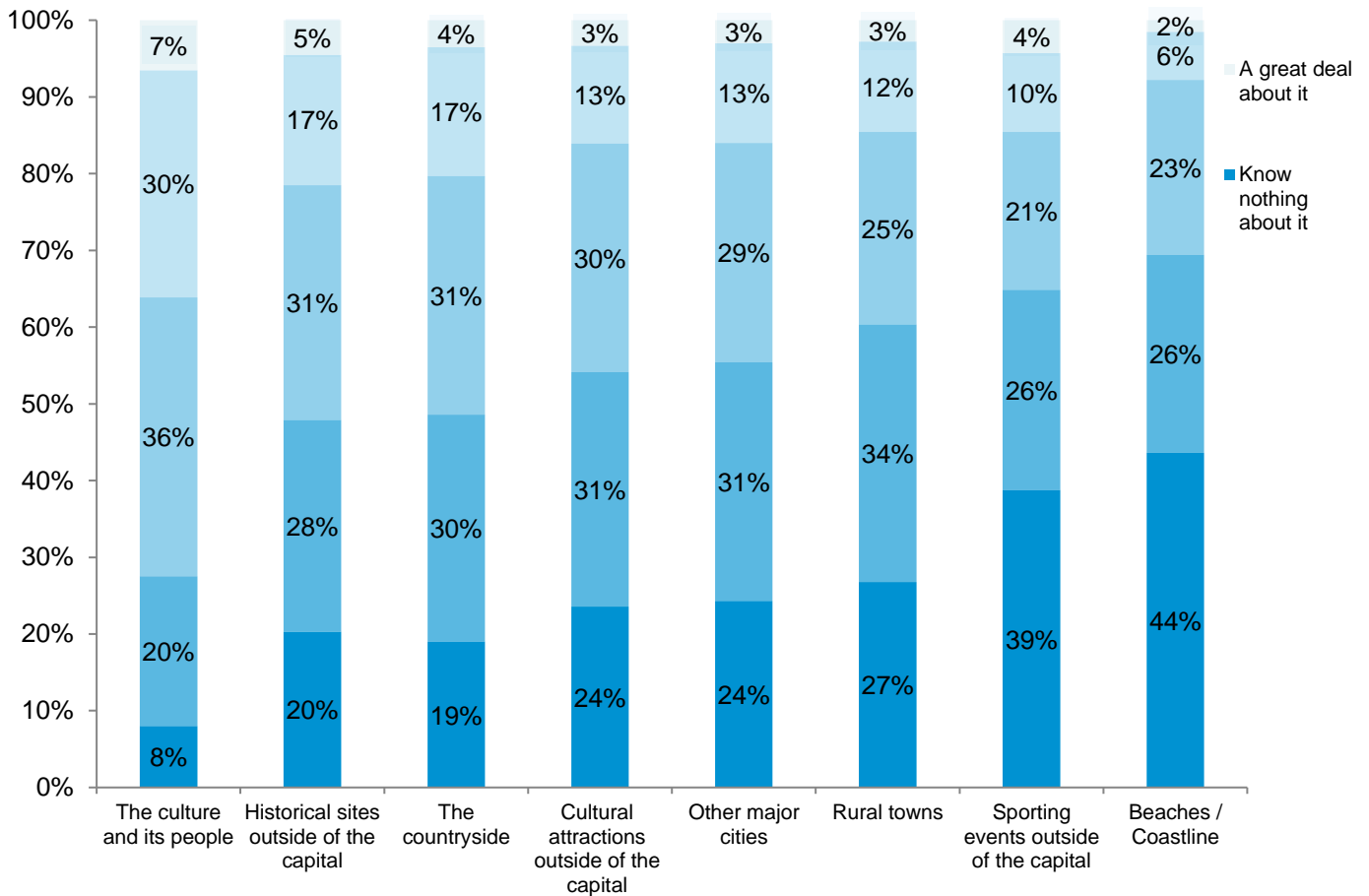
A key macro insight that leapt out from the Beyond London research programme was the lack of knowledge of those who had not been outside of London about what the rest of the country had to offer.

If we consider mature market solus London visitors, we can see from the graph below that there is little outright rejection of the offer around the country. Indeed certain aspects are positively interesting such as historical and cultural attractions outside of London.



Source: Beyond London Mature Markets Study 2013
 QB10 - Thinking about your trip to Great Britain, to what extent do you agree with the following
 Base: Total sample, all markets, all holidays taken in GB (n=840),

Yet when asked about their *knowledge* less than 40% claim to have much knowledge of the offer outside London on any of these dimensions, and far less than 40% for some of them.



Source: Beyond London Mature Markets Study 2013
 QC1 Please tells us how much you know about each of the following places
 Base: All markets: Solus London N=420

That is to say there is broad interest in getting beyond London to explore the culture, the history and the people, and yet many international visitors aren't doing so as there is little knowledge of what the offer is.

This presents a huge opportunity for rail to be the educator. Marketing / selling rail products linked to history / culture / getting out and about to see the “real England” offers a route to help educate and inspire travel beyond London.

Trains aren't scary

One of the biggest barriers to getting beyond London was perceived accessibility. Here, almost half (46%) of those interviewed were concerned about driving on the left hand side of the road. This is highest in the US at 54% and lowest in Germany but still at 40%. Trains negate this barrier in getting people beyond London – they're not scary!

In this section we have discussed the opportunity for trains to facilitate travel beyond London. On one level trains are an attractive feature of England's visitor offer in themselves, a dimension that is not unimportant in a person's consideration of what makes a good holiday destination. Not only this but trains, if wrapped up in appropriate packages, can help overcome that lack of knowledge that can be a significant barrier to regional travel. And finally trains of course can provide a less intimidating alternative than driving on the “wrong” side of the road, something which can prevent people from exploring more widely.

We will now explore some of the barriers & levers for using trains among international visitors.

Chapter 2

Barriers and Levers



Barriers to train travel

The project's wider focus on barriers to regional travel means that the research includes only limited information about barriers to public transport use specifically. Nonetheless, some barriers or potential barriers did emerge from the research:

- Lack of awareness of where people would actually catch the train to
- Lack of knowledge about where they might find out information
- Potential language barriers
- Time

The most significant barrier seemed to be a lack of awareness of where actually the train would take them and what they would do there. Indeed this was the major barrier for many in terms of getting beyond London at all, i.e. a lack of awareness of the culture, history, country and people outside the nation's capital.

Some may have post-rationalised that they wouldn't know where to start to find out information about trains but this seemed to be primarily due to the lack of expectation of the offer beyond London more than any real experience of information being hard to find.

It does however seem that some form of disruptive activity could overcome this, such as

- All-inclusive ticket that included air fare, accommodation and train / rail card
- Products marketed and linked directly to rail travel, e.g. cultural tours, music tours, historical tours

All markets would like to have the opportunity to have information in their own language. This particularly applied to Brazil and France. There was an underlying sense that perhaps Britain was less good at this than other visitor destinations. For instance in Brazil it was suggested that Britain relies on tourism less than other countries and consequently is less adapted to it.

This is not to say that this is currently a barrier for rail, as few of our sample had actually had experience of any rail websites with regard to Britain (and those who had experience didn't mention any difficulty.)

Having said that, if the information wasn't in their own language it could indeed be a barrier. Although many perhaps could manage with information only in English, the qualitative work pointed to a feeling that the country beyond London may not be so welcoming to / adapted for foreign visitors, and this concern would be heightened if information was not in their own language.

"I don't know, the French seem to be very good at giving us everything in our Portuguese. It seems well translated. As far as I recall the British stuff was badly translated not in Brazilian Portuguese...if it was at all. They seem less geared up to the foreign tourist" Brazilian Travel Agent

"The websites must be in French" French Solus London

The final barrier to train travel was considered to be time, although this was a perceived one rather than a real one. No matter where in the world the traveller was from, on the whole they did not want to travel much over three hours from London. Any more than that, and it did not seem worthwhile to most.

It is important to note that some of our US sample expected that the trips would be longer than they actually are, for example equating the distance from London to Manchester as being similar to NYC to Chicago (9 hours by train). Most of the other markets seemed to have a fairly good idea of distance and felt that most of what they wanted to see would be accessible from London by train.

None of these barriers are insurmountable and this suggests that there is potential to create some real traction through rail-based conceptual product, communicated in local languages, with clarity about travel times.

Levers to encourage more train travel

Again, although the research programme collected only limited information on this subject, it has been possible to identify three potential motivating factors:

- Concept of train travel per se
- Ease
- Discover the real Britain

As discussed above, the idea of train travel in itself can be attractive, particularly in markets such as GCC and Brazil where domestic rail travel is limited. This means that there is a novelty around rail travel, which an English rail product could take advantage of.

Those who had used rail travel in the UK had on the whole found it easy. They, more often than not, had taken the train from London. The only exceptions were those from Norway who in our sample had more regularly entered the country from Northern ports of entry. In addition, as we have seen, even those who have not gone outside of London expect that taking the train will not be too challenging (particularly when compared with the difficulty / stress of driving on the “wrong” side of the road).

While the question of the “final mile” – the connection from a station to the actual destination or attraction – is important for English destinations, this was not mentioned explicitly by respondents in this research. It should be noted though that there was no detailed probing of this issue, and so it is not possible to know what a deeper investigation might have revealed

One final lever (beyond specific itinerary based 'product' which we will discuss in the next section) was the idea that in getting out of London per se, one encounters the 'real Britain/England' - the real culture, the real people and the real lives. In the course of the research programmes it became apparent that many international visitors and potential visitors wanted to see, experience and discover other ways of life. Here, there is real potential for rail travel to enable the delivery of this, not only through access to the country beyond London but also through the rail journey in itself. That is to say that in travelling by rail, the potential visitor is using a mode of transport that the people of Britain (England) use, and as such are immersing themselves in the cultural life of England and the English - who are quite exotic to many foreigners (French, Germans and Brazilians in particular).

"The English are very different. I want to get on their trains. Eat the food, however disgusting it is. Drink the beer. For me this is travel" Brazilian Potential Visitor

"The English they are exotic. They are different. It is because they are an island people they are different from us" French Beyond London

"I want to see the real England. The little houses they live in." Indian Potential Visitor

Chapter 3

Ways to Optimise



In this section we will outline some insights uncovered through the research which indicate how the train offer could be optimised to better appeal to the international visitor.

Time

As discussed above, in there seemed to be around a three hour limit for a train trip from its starting point (almost always London) to the end destination. There is potentially a little leeway in this if the end destination is truly captivating – but in reality much of England is actually within 3 hours train time from London and it could be beneficial to point this out explicitly rather than relying on visitors to know / research for themselves.

The idea of ease of access to a different type of England will be of definite appeal to many – providing of course that the products developed in tandem are compelling.

Itineraries

At the end of many of the qualitative discussions we asked the respondents to develop their own product. Train would often be a component of these idealised itineraries.

A few recurring themes for itineraries emerged:

- History and heritage tours but not just generic - respondents were in search of something different / iconic beyond e.g. castles
- Regional train tours (but again little real definition of what regions and how)
- Cultural tours including music, food, drink and people
- Coastal tours for a minority (mainly Germans and Norwegians)
- Nature / countryside tours (mainly India and GCC, as Britain seemed so different from home)
- Adventure tours (niche - for some younger audiences)

In general there was an expectation that there would be 2-4 stops over a few days on such itineraries and then a return back to London.

This highlights a need for a more formal conceptual product development, so potentially visitors can better understand exactly what the experience of the product will be and what is its physical form. For example, the idea of Italy's three-city tour (Rome, Florence, and Venice) is a firm construct in American minds. It is both very physical but also very easy to imagine what it will entail. Can England create its own definitive products with as much resonance?

All In One

Across the research programme, for less experienced and adventurous travellers, the idea of an all in one product that included plane, accommodation and train could appeal.

This type of itinerary was very much seen as a London plus product, i.e. a few days in London followed by a few days discovering more of England via rail.

Where in the Decision Making Process?

When consumers are asked to reflect on train travel, it has appeal to many with respect to getting beyond London. However, it is not very front of mind except perhaps for those who are more adventurous and who actively want to get out and discover the country.

As such, there is a potential benefit in heightening the visibility of trains and the rail network for the international traveller.

It is difficult to gauge from the limited work we have done so far about the precise nature of what might have cut through. However, we would suggest that any form of defined product offer linked to train has scope to have appeal – and this implies that efforts should be made to get train travel and England at front of mind early in the decision making process, rather than after trips have been booked, through ideas such as railcards linked to plane tickets, specific itineraries or indeed other options.

Language

As mentioned above, wherever possible the language of the international traveller should be used. Even if an individual can navigate a site in English, putting it in his/her own language can suggest emotionally that England, beyond London, is able to cater for the needs of the international traveller.

At present these are high level ideas for how it might be possible to motivate increased consideration of the train, and from there drive increased regional spread. More in-depth research, particularly around itineraries and product ideas, would be required to be able to assess the appeal and potential benefits of these broad levers.

Chapter 4 Individual Market Stories



In this section we will highlight some of the market-specific points that emerged from the research



Norway

Open and willing to use train travel in the UK
Seem most widely knowledgeable of Beyond London offer
Most likely to go beyond London without London
Most interest in Northern cities



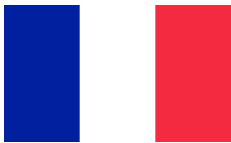
Germany

Open and willing to use trains
Positive experiences and expectations
Most open to countryside and coast
But also fairly happy in cars for right hand side drivers



US

Fairly open about using trains
Least knowledgeable about distance / times
Be interested if give them a great product
Quite fearful about driving on 'wrong side of road'
Most into IPs, i.e. James Bond, Harry Potter, Downton, Shakespeare



France

Least positive about English trains, expensive and dirty
Seem to focus on Southern coastline and rural / bucolic England
And meeting the 'exotic English'



India

Interested in trains
Have high expectations and positive experiences
Can be fairly explorative
Really interested in nature



Brazil

Very open to trains per se
More tolerant of longer travel times
Potentially a city / culture / music / people type of offer will interest
Less interested in history and heritage - can get that with rest of Europe that have much closer historical ties with.



GCC

Interested in trains
Most interested in first class travel
Can find nature exciting
BUT on the whole very London focused - with exception of hyper adventurous minority

Welcome to Liverpool Street

Platform 13 Ipswich Page 1 of 1	19:00 Platform 10 Norwich Calling at: Colchester Manningtree Ipswich Diss & Norwich. Page 1 of 1	19:00 Platform 16 Shenfield Calling at: Stratford Maryland Forest Gate Manor Park Ilford Page 1 of 1	19:02 Platform 12 Ipswich Calling at: Stratford Shenfield Chelmsford Hatfield Peverel Witham Page 1 of 1	19:10 Platform - Shenfield Calling at: Stratford Maryland Forest Gate Manor Park Ilford Seven Kings Goodmayes Chadwell Heath Ronford Page 1 of 1	19:13 Platform - Southend Calling at: Stratford Ronford Shenfield Billericay Wickford Rayleigh Hockley Rochford Southend R. Prittlewell & Southend
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East



Sum Up

Trains represent an important opportunity for getting the inbound traveller beyond London. A good public transport system, which Britain is perceived to have, has a positive effect on destination perceptions. Trains, and products linked to trains, can help educate the inbound traveller about England's offer beyond the capital and provide a low-stress alternative to those who are fearful of car travel on the wrong side of the road.

The primary barrier for trains for many inbound travellers is quite simply that they do not know where to take a train to from London – a gap in product knowledge - and they are unsure where they can find information. This is more due to not having the reason to seek out the information as opposed to it being hard to find.

The levers for train travel are that in itself it is an interesting idea (particularly for some emerging markets); the fact that the international inbound traveller can immerse themselves in the British way life by using our transport systems, and that they are easy to use. Those that have used the train in the past found it easy and those that have not done so expect to find it easy.

The train has the opportunity to enable people to find, explore and discover the real Britain – an important motivation – with themed itineraries and through ticketing potential options to enable this

In short there is real opportunity to leverage the country's rail network, combined with the right destination product, to encourage international visitors to travel beyond the capital to explore more of the country.



**ONE
MINUTETO
MIDNIGHT**