

Regional Customer Panels Autumn 2023

Feedback & Actions

14 November 2023

AVANTI
WEST COAST



Objectives

Avanti West Coast wanted to understand:

- What do customers know about Avanti West Coast?
- When presented with a series of facts about Avanti West Coast, to what extent do customers believe these?
- How best can these facts be communicated to customers to improve perceptions, including trust, of Avanti West Coast?

We covered five areas:

- Reliability
- Quality
- Sustainability
- Price
- People

Methodology

Avanti West Coast worked with research agency Human8 and held 5 focus groups to understand the general sentiment towards travel, rail travel and the impact of recent disruption.

Each focus group had participants from a specific area:

- Scotland
- North
- Liverpool / North Wales
- West Midlands
- South



1. Sustainability

"Did you know that going by an Avanti West Coast train instead of driving can cut carbon emissions by up to two thirds, which is the equivalent to removing up to 500 cars from our roads?"

What is sustainability to your customers?

Sustainability is about **lessening the negative impact something has upon the environment**. Acting sustainably means using less resources whether that be using renewable energy or recycling resources used. There is a divide among customers as to whether this is an issue that impacts their decisions and how much attention they pay to this. Some also mentioned that **sustainability is reliant upon a reliable service being offered** – customers cannot opt for the greener option of taking the train if it doesn't meet their basic needs.

What do customers know about what AWC are doing in this area?

While many know that train travel is greener than travelling by car, **no one could tell us about what AWC are doing to be more sustainable**. This is an area that customers feel AWC should be talking about as it is recognised that changes made by such a large organisation could have substantial impact.

How did they receive the fact presented?

This was felt to be an impactful statement regarding sustainable behaviour in general, but it **lacks impact when thinking about AWC** specifically as it is a claim that any TOC can make – it does not tell customers anything about what actions AWC are taking. It reinforces the reasons for travelling by train among those who do so for green reasons but in practice, decisions are made based upon factors such as price and reliability.

What else would they like to know about this topic?

Customers want to know what **actions AWC are taking as a company**, but these should be subtle reminders rather than large scale campaigns. This could be something as simple as small on-board reminders regarding initiatives – suggestions included recycling (both organic and in-organic waste) or highlighting sustainable or locally sourced food choices in the buffet car.

Sustainability is about making considered choices to reduce environmental impact but also to deliver a service that can be maintained and delivered. It is important to me, but I also need to be able to attend work so will find a way to travel regardless. (Scotland)

I think it's important in relation to Avanti. A company as big as Avanti can really make a difference. Don't know too much about what actions they are taking though. (North)

Would definitely make me think which was best to travel car or train? But all depends on strikes and cancellations! Sometimes that choice is made for us. (North)

At a lower level - maybe on board - initiatives around food waste and recycling. Esp when seeing bin bags full of good food dumped at the end of the day when getting off the train. (Liverpool / Wales)



£ 2. Price

"Did you know that Avanti West Coast fares from London to Birmingham can be as low as £16?"

What is a good value train ticket to your customers?

To be seen as good value, **train tickets should be less than the cost of making the journey via car**. Tickets should be affordable, and advanced ticket fares and special sales make them feel that they are getting a good deal. However, there **needs to be consistency in pricing** and fares need to be accessible to the average customer.

What do customers think about the cost of travelling with AWC?

It is felt that **ticket prices have crept up** a lot since AWC took over from Virgin. There is felt to be a **lack of lower cost Advance tickets or special offers** that may encourage greater train use or booking via AWC as opposed to a third party. Where Advance fares are available, it is felt that there is a lack of consistency in how much they may expect to pay for these.

How did they receive the fact presented?

The "from" fares were met with **scepticism and frustration** as they did not believe that they would ever be able to buy these tickets for a journey they would wish to make. These types of **statements are felt to come with a range of unstated caveats** regarding the number of tickets available and the times of day and route travelled upon.

What else would they like to know about this topic?

Customers want to know the stipulations behind the cheaper fares. How far in advance do they need to book? What times can they travel? How many tickets are available? This also needs to apply to the different types of tickets available on-board (i.e., Standard Premium and First Class). They want to be empowered to find the cheapest tickets when planning their travel.

A reasonable cost, especially when travelling in groups, for the journey I want to make. And not inflated or complicated due to time of day, routes etc. I don't want to pay the price of a holiday to go on a routine trip. (Liverpool / Wales)

Not great to be honest. The years I've been commuting tickets just seem to be getting more expensive and now having to pay £10 admin fee to change a ticket means I can't be flexible like I used to be, which was one of the reasons I used to book direct through Avanti. (Midlands)

Not many people will get the ticket they want at £32. So, Avanti will be advertising something 1% of people might buy. So very misleading. (South)

Perhaps actually say how many tickets are available at this price. Is this a marketing ploy to get people on to the site and if there are no tickets available at this price hope that they will buy from Avanti anyway. (Midlands)





3. Quality

"Did you know we've invested £467 million in refurbishing our trains and a brand-new fleet?"

What is a good quality train service to your customers?

A good quality train service is one that offers **good service at all points of the journey**. It needs to be on time, fully staffed, clean and with on-board facilities available throughout the journey (e.g., seat reservations working, onboard shop / buffet car open).

What do customers think about the quality of the service offered by AWC?

Reliability is having a detrimental impact upon perceptions of quality – after all, getting from A to B is the main purpose of catching a train. While on-board, there is some **dissatisfaction with other points of the service** – a lack of refreshments, staff shortages, uncomfortable travel conditions and broken seat reservations are all issues that customers would like to see resolved. Overall, service quality appears to be inconsistent.

How did they receive the fact presented?

There was a regional split in responses to this fact with some of **those in the North, Wales and Scotland saying that they were yet to have seen a refurbished train** while this was not mentioned by those further south. Some felt positively about this fact as they had noticed some improvements and liked knowing where their money was going. Meanwhile those who had not yet seen the refurbished trains **wondered why they had only encountered older trains** and questioned why money wasn't being spent on making services more reliable.

What else would they like to know about this topic?

Customers' perceptions of quality are quite different in nature to the fact presented – they would rather know that they will reach their destination on time and that affordable tickets will be available. Some mentioned that this fact would be a selling point if it was a bit easier for customers to relate to – how many trains have been refurbished and what does this mean for the onboard experience when travelling with AWC?

On time, seats that are reserved are free for you, fully staffed, buffet car working and open. (North)

Quality is hit and miss. Too many issues with short notice changes (so not technically cancellations), seat reservations not working, and poor availability of advance fares at times. (Liverpool / Wales)

Shocked because I have not seen where the money has gone. Can they spend money on reliable train services and staff instead? (Scotland)

It is a plus point, but what is the % of trains that have been refurbished? Again, advertising is misleading if most trains have not been refurbished. (South)





4. Reliability

"Did you know that Avanti West Coast cancelled only 2% of trains on average over the last six months?"

What is a reliable train service to your customers?

A reliable train service is one that is both **frequent and gets them to their destination on time**, and where customers are kept in the loop regarding changes to services.

What do customers think about the reliability of AWC services?

Perceptions of AWC's reliability appear to deteriorate the further North the customer is. Some feel that the service is getting better but those in the North and Scotland still experience significant disruption. Delays are commonplace with even those who are happier with the service saying that it is **rare to arrive at their destination at the scheduled time**. Where changes to services were made, some also mentioned that **staff hadn't been informed of the situation**.

How did they receive the fact presented?

The fact was met with **widespread disbelief** with some saying that they thought that they must have been on all of the cancelled trains! There was **questioning over how the fact was calculated** and what was omitted to arrive at such a low figure.

What else would they like to know about this topic?

Given reliability is about getting to their destination on time, customers want to also know **how many services operated to schedule**. This should be in a format that customers can relate to – a percentage means little to them whereas numbers of services, and details of the routes and times of day impacted give customers information they can act upon and evaluate. Customers want more information regarding the **reasons for delays and cancellations, and what alternative travel arrangements are available**.

Communications regarding **what is being done to restore a more reliable service** are also important to restore trust that services will get them to where they want to go and at the time advertised.

A service that runs on time, does not cancel services at the last minute and keeps passengers informed at all time about the running and time of the service.
(Midlands)

Currently quite poor. In two weeks travelling from Preston / Lancashire area I've had several delays and cancellations and unable to get home last Tuesday night as all services cancelled this resulted in me spending overnight there at a cost to self. No help from Avanti at all. (North)

Cancellation is a normal scheduled service train not running. So, 100% cancellation of all normal services today for example. So, 2% is I think mathematically impossible given the number of strike days. It would wind me up and cause me to think they were lying. (South)

Train delays and cancellations don't think the app is 100% accurate at times. Told me the train had left Lancaster when it actually had been cancelled from Preston and no further travel provided. This is where I lose faith in a service.
(North)





5. People

"Did you know Avanti West Coast employs local people from all across the UK from Glasgow, North Wales, Manchester, Liverpool and many places in between?"

What do your customers think should be shared regarding a company's employees?

The information shared is factual but much more detail is required in order for it to be impactful – how much are they paid? How are they treated? What training are they given? What is their level of staff turnover / retention?

What do customers know about AWC's employees?

Very little is known about AWC's employees. Many said that the staff themselves have been friendly but there is an assumption among some that they don't seem happy in their jobs with poor treatment from management.

How did they receive the fact presented?

This fact was felt to be stating the obvious – where else would they hire their staff from? As well as being obvious from a practical point of view, some said that it was clear from interactions with staff that they were from different areas of the country (e.g., from accents). Customers questioned why AWC would be communicating this given that it has no impact as a fact.

What else would they like to know about this topic?

Some want to hear about what they are doing to employ and retain staff given the link between staff shortages and service reliability. This may be information about pay or wellbeing services offered to employees. They also want to hear about improvements made to providing information to their staff while they are on-duty so they can provide information and solutions when disruption occurs.

Should be sharing the diversity and inclusion when hiring, salaries and customer service. Also training they are given to deliver services. (South)

The staff have been great with myself as a customer, but they were as frustrated as I was about the service they were delivering. (Liverpool / Wales)

I assumed they employed people from all over (we've all seen staff changes at Preston for example) - it doesn't seem surprising. (Scotland)

Are the staff thoroughly trained and have company knowledge that might assist travellers such as onwards connections. (South)



Key Findings & Recommendations

- Recall of Avanti West Coast communication is low but some respondents did remember the Turbo the Turtle TV ad. We need to test out communications to ensure the messaging is clear to both customers and potential customers.
- Perceptions are shaped more by customers' own experiences than by communications, so if the communications don't match the experience they won't be believed.
- Numbers (e.g. percentage of services) aren't relatable to customers and there's more interest in their day-to-day experience than information at a network level. We need to communicate how we are addressing issues to prevent problems and improve service for the future.

Thank you

