



LONDON NORTH EASTERN RAILWAY

**THREE CHALLENGES, ONE CLEAR GOAL:
HOW LNER REGAINED ITS LOST COVID JOURNEYS**

SUMMARY

COVID was tough on rail and although LNER led the industry in terms of pandemic recovery, there was still work to do. In April 2022, journey numbers were 83% of pre-pandemic figures which set a clear goal: recover the lost 17%. We developed a three-fold strategy to tackle the biggest challenges to winning back our elusive 17%.

1. Reawaken sleepwalking drivers

Those who'd reverted to car as their default during Covid and hadn't since questioned whether driving was their best choice, we named 'sleepwalking drivers'. To reawaken them, we opted to make cars the enemy and used dynamic OOH to show in real-time how much quicker their journey would be with LNER.

2. Post-covid connection

Leaving behind the rational messaging of Covid, we shifted toward building emotional connections and the feeling that 'LNER is a brand that gets me'. We uncovered human truths to showcase benefits of travelling LNER, updating messaging and tone across assets to increase emotional connection.

3. Getting savvy during the cost-of-living crisis

With everyone's finances getting pinched, we needed to make train travel feel achievable. We built a campaign which highlighted how to get the best value train tickets with a hero message around advance booking to get 51% lower prices which resulted in earlier booking behaviours.

Despite rail strikes making for another tough year, we've not only matched, but are now 1% ahead of pre-covid journey numbers, with 290,000 additional journeys. Across the brand funnel we're breaking records with results 10% higher on average than last year.¹

Three challenges, one clear goal:

How LNER regained its lost Covid journeys

Objectives

In April 2022, LNER was flying high on the news that they were leading the train industry in Covid recovery, racing 20 percentage points ahead of its long-distance travel competitors.² But there was a fly in the ointment, we had still only recovered 83% of journeys compared to pre-pandemic numbers. This set a clear business goal for the following year - regain the missing 17% of journeys.

We knew this wouldn't be easy, as these are the travellers who've been most resistant to returning to train and those who've changed habits during Covid, making this not only the missing 17% to discover, but also the hardest to win-back.

We developed a three-fold strategy to tackle the three challenges and barriers to regaining our 17%:

1. Awakening sleepwalking drivers

2. Connecting beyond Covid

3. Getting savvy through the cost-of-living crisis

¹ LNER Brand Deep Dive, September 2022

² Office of Rail and Road, <https://dataportal.orr.gov.uk/media/2050/passenger-rail-usage-2021-22-q3.pdf>, published 17th March 2022

1. Awakening sleepwalking drivers

Headroom analysis suggested that by stealing share from the road we could increase journey numbers by 37%.³ So after two years of being polite about cars due to the pandemic's public safety implications; with Covid restrictions lifted, we decided that now was the time to take on the open road and make cars the enemy.

We soon discovered that Covid had made cars the default option for many travellers. People weren't actively choosing to take the car over the train for long distances, instead they were sleepwalking into cars based on habit. We wanted audiences to question whether a car was in fact the right choice.

Strategy

Get people who sleepwalk into cars

To question whether it is the best way to travel or whether they should take the train
By pointing out the simple reality that LNER is quicker than the car.

Creative

As well as bringing explicitly anti-car language into our static and digital assets, we used innovative dynamic OOH assets to target drivers during moments of frustration to plant the seed of 'next time I'll take the train'.

Dynamic media was bought between Newcastle, Leeds and London, on key routes between those hubs, with sites located where traffic is most likely to get congested. When traffic was moving slower than the speed limit, the advert harnessed real-time data to simply point out how long it would take to drive to a key destination from the closest regional hub (to the media site), versus the amount of time the train would take.

Tracking showed ads performing well with 88% saying the ads showed them clearly why they should consider the train; and emotional engagement with 90% saying they liked or loved the ads.⁴ 68% of people who saw the ads considered travelling by train over car for their next journey of 2 hours or longer and 58% said they were likely to book tickets with LNER after seeing the ads.

2. Connecting beyond Covid

Tracking showed that our previous adverts did a great job in persuading people to think differently about what they could do on the train as well as highlighting moments like a "family dinner in London" that were worth getting out and travelling for. This was a rational approach, helpful during the constraints of Covid, to give people the friendly nudge they might have needed. However, this left us trailing behind other transport brands when it came to driving emotion. We wanted to change this, and take the brand from people seeing an ad and saying "makes sense" to instead feeling that "LNER is a brand that gets me".

Our three-year strategic platform was about progress and we knew that now was the time to move from focusing on functional progress to getting people to feel the progress of LNER. We needed to inject emotion.

To do this, we used audience research to uncover three benefits of travelling LNER which would talk to our sleepwalking audience; and then found related human truths. These truths were chosen as they had the greatest opportunity to develop creative work that would raise a knowing smile to the reader, and more emotional connection.

1. **Speed:** There's nothing more frustrating than getting stuck in traffic, when all you want to do is get stuck into your weekend.
2. **Low-Stress:** There's a false freedom in driving, it might feel good being able to just grab your kids and head off, but the reality is being stuck with kids in the back of a car is horrendous. Being with (or without) your kids on the train is far more freeing.
3. **Simple and easy to plan:** Life can be tough, messy and complicated but travelling by train can make it easier, with booking simpler than ever.

Strategy

Get our sleepwalking audience

To feel more emotionally connected to LNER and that "LNER gets me"

By shifting our creative from functional to encapsulating our human truths

Creative

We overhauled our OOH, digital and social assets to bring more personality.

Ad Tracking went from 16% of viewers saying they loved the rational static ads,⁵ to 57% saying they loved the Speed ad with its human truth. Overall 89% liked or loved the speed asset, 87% loved/liked the no-stress asset and 75% loved/liked the simple and easy to plan asset. The ads also increased consideration of using LNER over the car by 7%.⁶

3. Getting savvy through the cost-of-living crisis

The cost-of-living crisis has been on the horizon for a while, and people have been feeling the pinch. Long-distance train travel has two things working against it, the first is that people tend to view trains as expensive, the second is that people view it as a discretionary spend, together these create a real barrier towards train travel.

To avoid the cost-of-living crisis impacting journey numbers we ran research to understand what the most motivating messages in this context were and found that people were receptive to being armed with knowledge. We created a suite of assets to show travellers the best ways to get value train tickets from LNER, so fewer people would need to sacrifice train travel when money's tight.

Strategy

Get those feeling the pinch

To realise that travel with LNER is still an achievable treat

By arming them with ways to be savvy in finding LNER tickets

Creative

We developed creative assets based around the platform "savvy travel savings" with a hero message of "book in advance to get 51% lower prices on average". Since the campaign has gone live, we've seen averages in how far in advance people book travel go from a low of 14 days, to a high of 34 days. Enabling more passengers to travel for lower prices and continue journeying by train during the cost of living crisis.

⁵Ad & Mini Brand Tracking, November 2021

⁶Ad & Mini Brand Tracking, August 2022

Results

Despite a year of rail strikes impacting rail services, impacting customers reliance on rail and causing last minute pauses in marketing, our activity still delivered an ROI of £4.43⁷ (pre-pandemic ROI was £2.57). The campaign strategy has boosted our brand funnel to reach its highest levels across all awareness, usage and choice measures, with results placing LNER 10% higher on average than last year.⁸

Journey numbers are up 48% on 2022, revenue is up 57% and LNER is still leading the charge against competitors, 7 percentage points ahead of the next competitor East Midlands Railway.⁹

Most importantly, we've not only matched, but beaten our goal of recovering journeys lost in the pandemic. In fact, data shows that we're 1% ahead of pre-covid journeys, with 290,000 additional journeys made over the year.

⁷ LNER Econometrics, October 2022

⁸ LNER Brand Deep Dive, September 2022

⁹ Office of Road and Rail, Passenger rail usage report: <https://dataportal.orr.gov.uk/media/2190/passenger-rail-usage-oct-dec-2022.pdf>

DE-STRESS DRIVING
(By not driving)

It's amazing where our trains will take you. Travel to London and more on our speedy Azuma trains.

LNER
LONDON NORTH EASTERN RAILWAY

GET STUCK INTO THE WEEKEND
(Instead of the traffic)

It's amazing where our trains will take you. Travel to London and more on our speedy Azuma trains.

LNER
LONDON NORTH EASTERN RAILWAY

BAGGING GIG TICKETS. HARD.
(Booking train tickets. Easy.)

It's amazing where our trains will take you. Travel to Leeds, Edinburgh and more on our speedy Azuma trains.

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Connecting beyond Covid

THE EARLY BIRD CATCHES THE TRAIN
(For on average 51% less)

Book four weeks in advance to save on average 51%. For more ways to travel savvy, visit [LNER.co.uk/Savvy](https://www.lner.co.uk/Savvy)

LNER
LONDON NORTH EASTERN RAILWAY

OUR LOWEST FARES AT YOUR FINGERTIPS
(Deal Finder, point the way)

Download our app and use our Deal Finder to explore the cheapest dates and times to travel by train. For more ways to travel savvy, visit [LNER.co.uk/Savvy](https://www.lner.co.uk/Savvy)

LNER
LONDON NORTH EASTERN RAILWAY

LEEDS TO LONDON FROM £29.⁷⁰
(Big city, savvy saver)

Book early for the best deals, Monday to Friday. For more ways to travel savvy, visit [LNER.co.uk/Savvy](https://www.lner.co.uk/Savvy)

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Getting savvy through the cost-of-living crisis

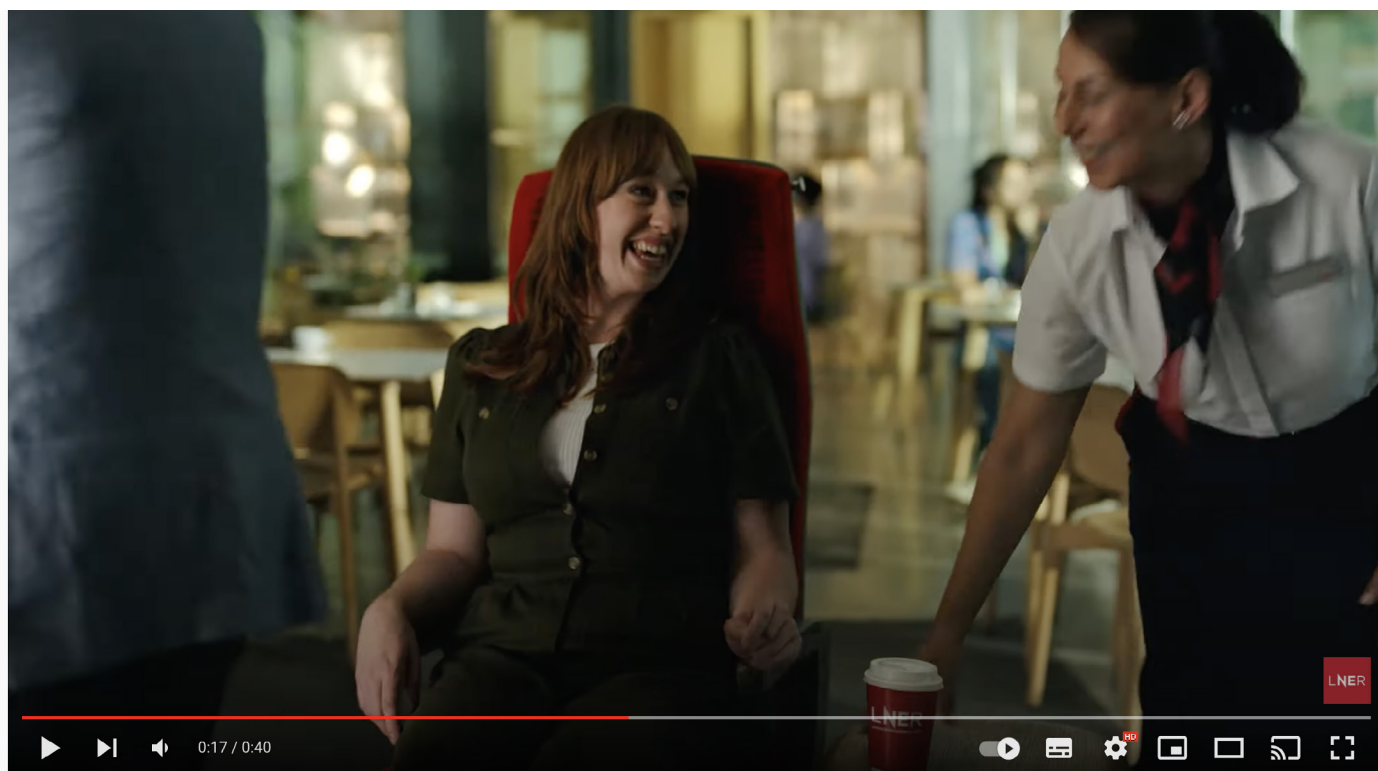
DYNAMIC OOH



Awakening sleepwalking drivers

TVC

<https://www.youtube.com/watch?v=Kz8R5XZnPel>



LNER | It's amazing where our trains will take you



IT ALL ADDS UP TO LESS

Whether it's booking in advance, which could save you as much as 51% on your train ticket.

Or our Deal Finder tool, which lets you explore the cheapest dates and times to travel by train.

Or being quids in on a journey from Leeds to London for as little as £29.70.

We're helping you find ways to make your big day out be a bit more affordable.

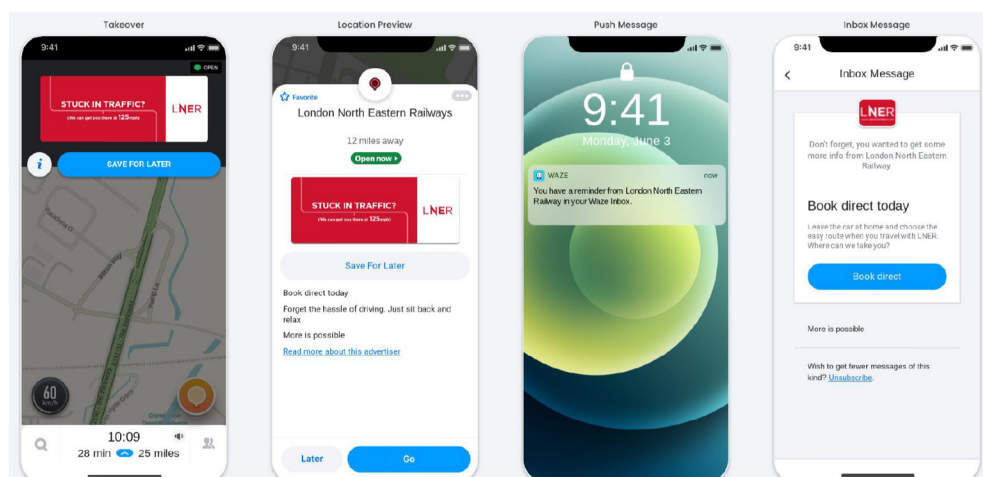
For more ways to travel savvy, visit [LNER.co.uk/Savvy](https://www.lner.co.uk/Savvy)

 **SAVVY TRAVEL SAVINGS**

LNER
LONDON NORTH EASTERN RAILWAY

Getting savvy through the cost-of-living crisis

DIGITAL & SOCIAL



Awakening sleepwalking drivers

SAVVY TRAVEL SAVINGS
(Ready to save on train tickets?)

TIP #1
Book 4 weeks ahead and save on average 51% v.s. on-the-day prices!

TIP #2
Use our app and Deal Finder to get the lowest fares at your fingertips

TIP #3
Join LNER Perks to get £5 credit free AND for a limited time only earn 10% credit back on every LNER trip

Book now & travel savvy

LNER
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EDINBURGH
NEWCASTLE
LEEDS
LONDON
AND MORE

SAVVY TRAVEL SAVINGS

Saving average based on all LNER Standard Advance tickets bought on the LNER website and App at least 4 weeks before you travel vs buying any Standard ticket on the day you travel.

10% offer available to Perks members only, when booking via the LNER app between 27.02.2023-16.04.2023. For more information, visit LNER.co.uk/Perks

Getting savvy through the cost-of-living crisis