
Downloaded from:

Usage Guidelines:
Please refer to usage guidelines at lib-eprints@bbk.ac.uk. or alternatively.
Marketing Strategy in Britain’s Mainline Railways, 1923–38

<table>
<thead>
<tr>
<th>Journal:</th>
<th>Journal of Historical Research in Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manuscript ID</td>
<td>JHRM-05-2017-0016.R2</td>
</tr>
<tr>
<td>Manuscript Type:</td>
<td>Research Paper</td>
</tr>
<tr>
<td>Keywords:</td>
<td>railways, transport marketing, service marketing, Marketing history, Advertising history</td>
</tr>
</tbody>
</table>
Marketing Strategy in Britain’s Mainline Railways, 1923–38

Historians have long regarded Britain’s railway companies in the interwar period as by and large devoid of commercial acumen. Aldcroft, Dyos, Savage and Channon are among those who saw the railways as failing to adjust to the changing economic and business environment (Dyos and Aldcroft, 1969; Savage, 1959; Pollins, 1971; Crompton, 1985). Channon wrote that the railway companies had little understanding of the need to conceive ‘an approach to strategy that focused on marketing’ (Channon, 2001, p. 50). Even for relatively mild critics such as Bonavia, the railways only started to address commercial policy issues, if at all, from around 1930 when the commercial lethargy of railway companies became the target of severe criticism by the 1931 Royal Commission on Transport (Bonavia, 1978). But even then, according to the existing accounts, their commercial efforts remained superficial and half-hearted. This article challenges this largely accepted view, and instead argues that the railway companies were far from lagging behind in the growing field of transport marketing.

Rather, the available records suggest that the railway companies of the interwar period can be viewed as sufficiently marketing conscious business organisations.

A reassessment of railway marketing during the interwar period requires an explanation that accounts for both the relatively advanced position of railway marketing and the decline of rail travel in the interwar period. The chief cause for the relative decline of the railways’ passenger business was clearly the intense inter-modal competition (Barker, 1986). However, the conventional account of the railways’ loss of passenger business scarcely incorporated marketing as a factor affecting the industry’s business performance. It has generally been assumed that the condition of the passenger business is dependent upon exogenous elements such as the economic condition, or simply the necessity to move (Preston, 2001). Hence the alleged failure of the railways’ commercial policy has been identified as an insufficient response to market demand, rather than a failure of proactive policy. Such an argument is a retrogressive evaluation of the situation, in which the decline
of relative market share is supposed to indicate absence of marketing strategy (Aldcroft, 1968, pp. 63–64). There is an alternative scenario. There was a marketing strategy that worked, but it had a limited impact on the railways’ passenger business, which was not enough to redeem the passenger business as a whole. The latter argument fits with historians’ recent research into the railways’ publicity work. As a series of studies have demonstrated, railway publicity in the interwar period was highly sophisticated commercial propaganda (Bennett, 2000; Divall, 2011; Harrington, 2004; Medcalf, 2011; Thompson, 2012; Watts 2004). Both the quantity and quality of the interwar railways’ publicity material seems to confirm the claim of these scholars that the railways were adept advertisers. Then how can this be compatible with the decline of passenger business? This unresolved question points to our insufficient understanding of the comprehensive business context within which railway publicity was created and consumed, and the link between railway marketing and the business performance of the railway companies.

The following sections address three topics related to marketing of the railways during the interwar period: organisation of marketing, advertising expenditure and marketing alliances. The aim of these examinations is not just to elaborate on developments within the railway industry. In spite of the growing popularity of marketing history, we have only limited knowledge of how institutional marketing was conducted in the early twentieth century, especially in Britain. At the same time, due to marketing history’s traditional focus on commodity marketing, we are only beginning to understand the corresponding marketing development in the service sector in the early twentieth century (Corley, 1987, p. 65; Church, 2000; L’Etang, 2004; Heller, 2016a and 2016b; Schwarzkopf, 2012). The recent scholarly attention to service marketing calls for a revision of the development of Britain’s transport business (Heller, 2010; Gladden, 2014; Pirie 2012). This paper aims to contribute to the growing literature on the history of consumer service marketing by examining one of the biggest industries in interwar Britain. As the discussion chiefly concerns the consumer market, its main focus is railways’ passenger business.

The first topic to be discussed is organisation: how railways’ marketing was organised in
terms of a corporate structure. This also entails the personnel involved in railway marketing, and their work. These considerations reveal that the railway companies clearly recognised the strategic value of marketing, and the same recognition becomes apparent in an examination of a series of re-organisations from the late 1920s. The railway companies’ marketing strategy appeared in terms of financial calibration. At a time when marketing functions were yet to be clearly defined in business corporations, advertising expense is the closest, though incomplete, financial data we have for seeing how much the interwar railway companies invested in marketing. The railway companies’ allocation of advertising expenditure reflects the wider commercial strategy regarding their passenger business. The next question is how did the marketing strategy appear in terms of sales? A case study is drawn from industry-wide marketing activity, mostly appearing in a nascent form of marketing alliances among the railway companies, such as joint marketing through coordinated service introductions and sales efforts.

By examining the railways’ marketing orientation in three areas, this article demonstrates the railway industry’s relatively advanced position in terms of its willingness to adopt various marketing techniques in the contemporary business context. It also re-connects railway marketing and the railways’ passenger business more broadly. Rather than separating railway marketing from the decline of railway business, the railway companies’ marketing efforts during the interwar period can be better understood as the industry’s response to its loss of business chiefly caused by the inter-modal competition from road traffic. Such an understanding enables an alternative interpretation of the railway business during the interwar period, addressing the seemingly contradictory views of existing studies on Britain’s railways in a period that has been regarded as both the golden age of railway advertising and, at the same time, a period characterised by the railways’ un-enterprising commercial policy.

The main primary sources for this article are drawn from the archives of the mainline railway companies’ business records held in the National Archives, UK. As the article focuses on the formative period of railway marketing, when the marketing organisation for each company was still
fluid, the companies’ internal records relating to marketing can only be found scattered across different sections of the companies. There are two exceptions. The first is the Railway Clearing House’s (RCH) meetings conducted with advertising and publicity representatives, which took place throughout the interwar period as a forum for industry-level discussions on marketing policy and operations. Second is the Great Western Railway (GWR) in which passenger marketing was discussed by the Traffic Committee and presented in the Annual Report of the Traffic Department. Records are less consistent regarding the marketing work in the London Midland and Scottish Railway (LMS), the London & North Eastern Railway (LNER) and the Southern Railway (SR). Occasional reviews and situation reports of their marketing developments, such as the LNER’s report on advertising organisation (LNER, 1923) and the LMS’s 1929 report on publicity arrangements (LMS, 1929a), are invaluable historical records of marketing in these companies. Of particular importance is the LNER’s advertising expenditure, reconstructed in Table 1, based on the company’s internal accounts (RAIL 400/64–73). Hughes (1990) in his study on the LNER, located only aggregate figures of advertising expenditure for the years 1924 and 1929 (Hughes, 1990, p. 131). Table 1 of this article provides the details of expenditure—the original 59 items were grouped into 13 categories—allowing us to look more closely into the company’s financial control on marketing activity.

The railway companies’ business records are supplemented by the railway companies’ staff journals. Originating in the 1880s, the publication of staff journals became a common practice in the railway industry by the early twentieth century. In the interwar period, all four mainline companies had their house journals: *GWR Magazine*, *LMS Magazine*, *LNER Magazine* and *Southern Railway Magazine*. Toward the end of the 1920s, topics related to marketing began to feature in these journals regularly as railway marketers employed the media not just to report on their work but also to cultivate employee loyalty and nurture a culture of salesmanship among all levels of the company workforce. For example, *LNER Magazine* ran a regular feature called ‘Advertising Notes’, starting in December 1928, written by the company’s advertising manager C. G. Dandridge (LNER, 1928b, pp. 630–631). Together with the railway industry’s chief publication, *Railway Gazette*, railway staff
journals contain a wealth of information concerning railway marketing.

The Business of Railways in Interwar Britain

Britain’s railway companies, about 120 of which existed before the First World War, were consolidated into four group companies by the Railways Act of 1921. The ‘grouping’ created four massive commercial organisations, known as the Big Four: the LMS, LNER, GWR and SR. The Big Four companies inherited a business that was suffered by major problems. The frenetic development of railway construction in the nineteenth century led to the creation of an inefficient network. In 1923, Britain’s railway lines stretched over 20,334 miles and contained a number of infrastructure duplications. For instance, inter-city traffic that connected London with Exeter, Plymouth, Birmingham and Manchester had two to four routes (Haywood, 2009, p. 21). Route duplication often entailed overinvestment in facilities such as passenger stations and goods depots. The interwar period saw some reduction of line mileage with 1,200 miles of railway lines closed between 1923 and 1938; line closures were concentrated in the early 1930s, when over 200 miles were trimmed from the network each year (Loft, 2006; Patmore, 1966). Although the closures addressed duplication and over-provision to some extent, their scope was usually limited to the withdrawal of particularly unremunerative services. The companies rarely had sufficient capital to rationalise their network (Patmore, 1966, pp. 114–117). The direct cause of the railway industry’s financial hardship was the First World War, which left companies with a considerable backlog of repairs and maintenance after the extensive use of the railway system under wartime government control. The £60 million compensation from the government was hardly enough to recover the railways from war damage, let alone to modernise their fleet and tracks. Most of the gross railway investment of £238 million during the interwar years was cancelled out by depreciation and replacement of the companies’ assets (Bonavia, 1978, p. 77). Under the circumstance, network upgrading was equally limited. In 1938, only 5.3% of Britain’s rail tracks were electrified, and electrification was mostly confined to the south of the Thames by the Southern Railway (Foreman-Peck and Millward, 1994, p. 246). Furthermore,
despite the expectations of the Ministry of Transport, the grouping did not eliminate inter-firm competition. Rivalry between railway companies continued for some routes, notably for Anglo-Scottish traffic (Butterfield, 1986, 24–26). Britain’s mainline companies had to face intensifying competition from road traffic with heavy burdens that carried over from their predecessors.

From the turn of the twentieth century, the supposedly oligopolistic position of the railways had already started to become threatened both by the introduction of electric trams, and after the war, by rapidly growing road traffic (Barker, 1986; Barker and Gerhold, 1993; Bagwell, 1988; Scott, 2002). Figure 1 shows the general trend of railways’ passenger revenue. Although the initial drop in 1926—mostly attributed to the General Strike—was considerable, the subsequent reduction of passenger receipts was halted after the 1932 trough (LMS, 1946; Crompton, 1985, pp. 230–231). Apart from the negative impact of the strike on passenger traffic, the railway companies interpreted the initial decline of their passenger business as resulting from road competition. The LNER’s report of 1927 pointed out that where direct competition with motorbus services existed, there was as much as a 90 per cent reduction of traffic, and the diminished traffic was inversely related to the increase in motorbus traffic (LNER, 1927). Similarly, the Railway Companies’ Association stated that 15 per cent of the total 17.3 per cent decline in passenger receipts between 1923 and 1930 was due to road competition, both from the motorbus and the private car (RCA, 1932).

Insert Figure 1 About Here

Figure 1. Big Four Passenger Revenue, 1924–1938

Source: TNA, RAIL 398/42–55

The railway companies tried to meet the road competition by lowering passenger fares and introducing various reduced price tickets, but such a strategy was naturally accompanied by a decline in receipts per unit (GWR, 1924; Barker and Gerhold, 1993, p. 67). This price strategy also needs to
be considered in conjunction with the fact that the railways’ passenger business had already been
taking the low-margin, high-volume business model from the last quarter of the previous century,
through the opening up of long-distance services to third class passengers, and the abolition of
second class travel (Freeman, 1988, p. 47; Smith, 1988, pp. 62, 66–67). Consequently, by the interwar
period, the major part of passenger revenue came from third class passenger traffic. In addition to
the low-margin, high-volume service orientation, a significant change in passenger revenue occurred
around 1930. This was the clear shift of the chief revenue source from standard fares to reduced
fares (Bonavia, 1978, pp. 69–71). Reduced fares in this article refer to the types of ticket with fares
lower than the ‘full-fare’, including excursion tickets and the tourist ticket.¹ The so-called workmen’s
ticket and season ticket are excluded from the discussion of this article, as their shares in the railways’
revenue were small, and they were fairly constant throughout the period (Hughes, 1990, p. 173). As
clearly seen in the passenger receipts on the Big Four companies, the share of reduced fares
surpassed that of the full-fare from 1930, and the former grew constantly during the remainder of
the interwar period (Figure 2).

Insert Figure 2 About Here

Figure 2. Big Four Passenger Receipts by Ticket Type, 1923–1937

Source: Railway Returns, various years

Whether the railways’ reduced fare policy was effective in compensating for lost traffic is
debatable, but the policy is indicative of the existence of the railway companies’ focused marketing
policy. The introduction of reduced fares was accompanied by substantial publicity so as to make the
new arrangement known to the public (LNER, 1930, p. 390). At the same time, reduced fares were
usually accompanied by certain restrictions, for example, on the route, timing, and period of validity,
all of which required an extra flow of information to the customers (The Times, 1923; The Times,
1927; Aldcroft, 1968, p. 40; LNER, 1929, p. 231). This naturally called for extra marketing effort. As such, the change in revenue structure was likely to have been supported by marketing organisation.

**Railways’ Marketing Organisation**

Many of Britain’s railway companies had an advertising department from at least the last quarter of the nineteenth century. In the early years of rail travel promotion, the advertising function was firstly placed directly under the General Managers, as it was mostly about choosing appropriate advertising agents and making orders for print notices (Shin, 2014, pp. 191–192; Wilson, 1970, pp. 19–21). When the need for advertising increased, the office of the Superintendent of the Lines, which could respond to the change of services quickly, generally came to assume the function. From around the 1890s and 1900s, the specialisation of advertising led to the setting up of dedicated advertising, or publicity, departments in many companies. These new departments became increasingly independent from the operational side of the company, and accordingly, their work became more imaginative and technical (Shin, 2014, pp. 196–199). The marketing sections of the Big Four were direct descendents of these departments. A certain degree of continuity from prewar railway advertising is clear with regard to the LMS, the largest of the Big Four. In March 1923, T. C. Jeffrey, the former Superintendent of Advertising on the Midland Railway, was appointed Superintendent of Advertising and Publicity of the LMS (Cole and Durack, 1992, p. 12). Jeffrey’s post was initially placed under the General Superintendent’s Department at Derby, and the company soon recognised that separating publicity work from their headquarters was not the most effective arrangement; hence the Advertising Department was transferred to Euston in 1925, placing it under the direct supervision of the General Manager (Railway Magazine, 1926, p. 78; Railway Gazette, 1923, p. 426).

The early advertising work of the LNER, Britain’s second largest railway company, was also led by a career railway advertiser. The LNER’s first Advertising Manager, W. M. Teasdale, came from the North Eastern Railway, where he had been the Trade Advertising Agent and, from 1920, Advertising Manager (Middleton, 2002, p. 13; North Eastern Railway, 1921, p. 18). As with other
companies, the policymaking of the LNER’s advertising functions was fairly concentrated, and the Advertising Manager was responsible for overseeing advertising policy across all the company’s territories, from issuing advertisements and controlling expenditure and freight advertising (LNER, 1923). The LNRE’s Advertising Department had, apart from its head office in London, three area offices in Southern, North Eastern, and Scottish areas. Teasdale travelled between these offices, directing regional advertising clerks.

In terms of company structure, the GWR was the company which most firmly maintained continuity in its corporate structure, including its Publicity Department within the General Manager’s Office. However, with regards to its personnel, the GWR was not averse to introducing new blood. Unlike Jeffrey and Teasdale, William Henry Fraser had no experience in pre-war railway advertising when he was appointed as the GWR’s Publicity Agent in 1924 (GWR, 1943, p. 62). Since he started working for the pre-war GWR in 1892, he spent most of his career in the company’s engineering department. It was only at the outset of the First World War that Fraser came to the field of publicity as the Publicity Officer for the Railway Executive Committee. The circumstance of his career change is unclear, but a possible explanation lies in his family connections: Fraser was the younger brother of a journalist, Lovat Fraser who contributed to The Times and other newspapers (The Times, 1926). It is highly likely that his appointment was based upon his personal connection with the press. In fact, the GWR’s keenness to maintaining strong ties with the press was shown by the establishment of a Press Bureau in 1923 under the Superintendents of the Line, which was said to be the first of its kind in the railway industry (GWR, 1923; Wilson, 1970, p. 46). Another example of the GWR’s connection with the press is the company’s employment of journalist Geo E. Beer. Beer was the news editor of The Times between 1914 and 1920, and after the war, worked on ‘propaganda’ for the GWR before returning to journalism as the editor of the Daily Mail in 1924 (Pole, 1968, pp. 84–85; The Times, 1938). While the LMS and LNER relied on experienced advertising managers for directing the newly established publicity departments, the GWR cultivated personal connections with relative newcomers to railway advertising in order to build up its publicity work.
The grouping negatively affected advertising organisation on the SR. The setting up of a publicity section was delayed until October 1923, with the delay resulting in the establishment of two departments dealing with the same function divided by geographical areas. Sectional differences soon became indistinctive, but SR publicity in the immediate postwar period was far from commendable (Cole and Durack, 1992, pp. 10–11). This changed around 1924, when criticism of the SR’s suburban services was at its height (Bonavia, 1987, pp. 62–63). Herbert Walker, the SR’s General Manager employed a young journalist, John Elliot, who had worked for The New York Times in the United States, and the Daily Express and the Evening Standard in Britain (Elliot, 1982, p. 16; SR, 1933, p. 322). On the appointment of Elliot as Public Relations and Advertising Assistant to the General Manager, the former two publicity sections were merged into one. The SR’s publicity section was then effectively centralised, with indoor and outdoor sections, and a Press Information Bureau (Elliot, 1928, p. 167; Lamb, 1926, Fig. 1). The SR’s publicity took root in a similar fashion to the GWR, by recruiting an outsider to lead its publicity. Unlike Beer of the GWR, Elliot remained in the industry, successfully establishing himself in the company (Harrison and Moloney, 2004, p. 209).

As the railway companies became keenly aware of the significant effect of the rise of road transport from the mid-1920s, a series of reorganisations were conducted by most of the Big Four companies. Until then, whether maintaining the continuity in personnel (LMS and LNER) or accepting outsiders (SR and GWR), the early advertising policy of the Big Four was based on the skills, experience and ingenuity of individual advertising managers. This was, in a sense, an old model of marketing, dating back to the period when railway managers dominated the selling side of the business and little effort was made to systemise marketing. However, in the late 1920s, this started to change. In 1927, the LMS’s publicity policy changed with the retirement of T. C. Jeffrey, who was succeeded by G. H. Loftus Allen, with his experience of freight services on the continent and in the US, which presumably involved the development of traffic (LMS, 1927, p. 240; Ellis, 1970, p. 47). Together with Allen’s appointment, the LMS obtained the service of Sir Charles Higham, one of the most influential advertising agents at the time, who was taken on to advise on the company’s
publicity (LMS 1929b). In the following year, 1928, the LNER went through a re-organisation by attaching the Press Section to the General Manager's Office: this reorganisation created a new post, that of Information Agent to deal with public relations. The LNER's re-organisation, like the LMS case, coincided with the departure of the former chief of Advertising, Teasdale, who was promoted to the Chief General Manager in 1927. The post of the head of the Advertising Department went to an ex-Great Central man, C. G. Dandridge who had a varied railway career in France, Russia and Turkey during the war (Middleton, 2002, p. 14; LNER, 1928a, p. 106). Dandridge further boosted the company’s publicity work, including, for example, making a regular contribution to the company magazine publicising the Department’s work, as well as familiarising the workforce with the idea of railway marketing (LNER, 1928b, p. 630). This reorganisation also shows the growing importance of public relations in railway companies, though the separation of advertising/publicity and public relations was by no means typical of railway companies of the time.

In 1930, the SR also undertook reorganisation, in that the responsibility of running the trains and procuring traffic came under the control of a Traffic Manager, E. C. Cox (SR, 1930a, p. 90; Bonavia, 1987, pp. 34–35). Elliot was appointed Assistant to the Traffic Manager—an old fashioned name for a marketing assistant, as Elliot later explained—dealing with the development of traffic (Elliot, 1982, p. 43). The responsibility of Elliot's post covered 'procuring passenger, freight, parcels and miscellaneous traffic, and will take steps to develop the traffic' as well as control the company’s direct sales force (SR, 1930b, p. 200). Compared to other companies, the GWR's approach was cautious, though not entirely conservative. Each of Fraser’s two successors—K. W. C. Grand and G. E. Orton—had spent a few years in the US as the company’s General Agent, dealing with the company’s overseas promotion (Wilson, 1970, pp. 31–32; GWR, 1929a, p. 165). In 1932, Grand took over Fraser's post on the latter's retirement. In the following year, the post of Commercial Assistant to the Superintendent of the Line was created and Grand was duly appointed. In 1934, Orton followed a similar career path, from the Publicity Agent to the Commercial Assistant. It is not clear what the experience in the US gave to the two GWR Publicity Agents, but the trajectories of the
career of the two men suggests the GWR’s growing awareness of marketing to a wider audience, including overseas customers. This reading of the situation fits with the appointment of Orton’s successor in 1934. The GWR recruited the former chief of outdoor publicity for the Empire Marketing Board, M. J. M. Dewar (GWR, 1934a, p. 419). In sum, the GWR’s chief publicity officers after 1932 were consistently those who had some experience in overseas marketing, showing that the GWR embraced one of the most forward-looking personnel policy with regards to its marketing section. To a varying degree and means, all the Big Four went through reconfiguration of their marketing functions, and with this, the scope of railway marketing was extended.

We do not know how intentionally the above mentioned marketing section of the SR was created. By contrast, the LMS’s commercial section was clearly based on the idea of marketing. Instigated by the Vice President Ernest Lemon, in 1932, the LMS Board decided to place its entire commercial operation under the control of an independent Chief Commercial Manager, in order to ‘produce a really saleable article, and for the sales effort in respect of all descriptions of transport provided by the Company’ (LMS, 1940; LMS, 1946, p. 16; Jenkins, 2011, pp. 66–67). At the same time, the company’s direct sales section—known at the time as ‘canvassing’—came under the Chief Commercial Manager. Not only did traffic canvassers come to work in the new section, a Commercial Research Section was established in October of the following year to conduct research into commercial aspects of all types of rail traffic. This was described by the company as ‘an entirely new feature in British railway administration’ (LMS, 1940). In 1934, the LMS’s territory was divided into 35 districts and various information was assembled for the Research Section (LMS, 1946, p. 16). Ashton Davies, the company’s Chief Commercial Manager, stated that the LMS was conducting detailed statistical traffic analyses including some sort of demand forecasting, and its excursion programmes were related to the densities of population, general spending power, and to the distance between industrial areas and pleasure resorts (Davis, 1934).

This re-organisation series goes against Bonavia’s claim that the railway companies only started to address the allegedly lethargic commercial policy in the early 1930s (Bonavia, 1978, pp.
As shown above, in the late 1920s, their commercial policy had already started to show signs of change. These organisational changes were not innovations that entirely originated in the railway industry: public relations, marketing departments and market research were previously adopted by other industries. Nevertheless, the early accommodation of a set of innovations contrasts sharply with the traditional image of the railways’ ‘conservative and unenterprising’ commercial policy (Dyos and Aldcroft, 1969, p. 329).

Situating the railways’ marketing in relation to other industries casts light on the relative degree of development in railway marketing. Most especially, a comparison with some public utility companies is revealing of its contemporary standing. For instance, from the first decade of the twentieth century, gas companies embraced the importance of advertising and publicity. Since 1903, Francis Goodenough had been worked as Controller of Gas Sales, a position that dealt with marketing, for the Gas Light and Coke Company (GLCC). When Goodenough was appointed to this position, the gas companies started to face competition from the new source of energy, electricity, which was slowly but steadily gaining ground (Clendinning, 2002, p. 117). The situations of the gas industry and that of the interwar railway industry were fairly similar, in the sense that both of them faced significant competition from newcomers: the gas industry faced competition from electricity, and the railways was struggling to compete with the motor car. The difference between the gas companies and railways was that, until the 1930s, the former group chiefly relied on outside agencies for its advertising and public relations while railway companies had long been internalised their marketing work. It is true that, from 1912, the gas industry had developed an industry-wide publicity group, the British Commercial Gas Association, but the GLCC used the London Press Exchange until it established its own Publicity Department in 1931 (Clendinning, 2002, pp. 123–124). The GLCC’s head of publicity was A. P. Ryan who came from the Empire Marketing Board. Although this appointment was made three years before Dewar came to the GWR, for the extent of corporate level adoption of marketing, the railway companies were by no means running behind even the gas industry.
Indeed, the railways’ use of market research shows the relatively advanced position of the industry in terms of marketing technique. Compared to the United States, where, from the 1910s, public opinion polls and market research were conducted by organisations like Gallup and the Curtis Publishing Company, British firms generally lagged behind (Jeremy, 1998, p. 486; Marchand, 2011, p. 86). American manufacturers such as Coca-Cola and General Motors had already seen the value of market research and incorporated it into their corporate organisation and strategy by the 1920s.

However, as Schwarzkopf has demonstrated, the gap between British and American marketing was not as wide as previously thought. For instance, J. Walter Thompson agency (JWT) conducted large-scale market research for Liver Brothers during the 1920s, and by 1930 the company had established the in-house advertising group that eventually became Lintas (Schwarzkopf, 2009; Sharpe 1964). JWT also assisted Rowntree, which also came to have its own research departments, employing market testing techniques between 1933 and 1936 (Dickinson, 1928, p. 7; Fitzgerald, 1995, pp. 31–32). Similarly, the BBC set up a Listener Research Department from 1936 (Jeremy, 1998, pp. 479, 486; Moser, 1949). The LMS’s Research Department, established in 1932, was among these earliest practitioners of market research in Britain.

The organisation of railway marketing and its series of reorganisation reveal the fairly high level of sophistication of railway marketing, with its openness to organisational innovation and marketing techniques. At the same time, the railway companies carefully selected suitable personnel to lead their marketing sections. At the organisational level, therefore, the railways’ incorporation of marketing in their commercial policy is fairly apparent. Then the question is whether the railways’ marketing organisation worked efficiently? The administration of marketing needed to achieve results with an eye to effective—which usually meant economical—marketing with the maximum possible impact on sales. Both objectives involved the strategic allocation of resources, which chiefly meant controlling expenditure. The following section examines the financial calibration of railway marketing.
Financial Control over Railway Marketing

Owing to the lack of data and the idiosyncrasy of itemisation in railway accounting, there is no complete data series showing the comparative publicity expenses of all the Big Four companies. Possibly the most consistent record of advertising expenditure is that of the GWR’s advertising budget, which covers the entire interwar period. The company’s advertising budget shows that its annual total advertising budget had kept around the £100,000 mark, representing 1.17 per cent of passenger receipts in 1927. The GWR was not the largest spender in railway advertising, however. In the same year, the LNER and the LMS spent £264,604 and £264,006 respectively on advertising, equivalent to 2.16% and 1.39% of their passenger receipts (LMS, 1929a).

In Kaldor and Silverman’s analysis of contemporary press advertising across Britain’s industries in 1935, the service sector in general was underrepresented. While manufacturers’ spending was estimated at £46 million and retailers’ £9.7 million, accounting for 52% and 10.9% of the total, service advertising (including that of real estate and financial services) accounted for around £13 million, a 14.5% share in national spending on press advertising (Kaldor and Silverman, 1948, p. 10). Although the significance of the transport sector in service marketing was acknowledged—40% of service advertising came from the ‘travel and transport’ industry—press advertising alone is an insufficient indicator of the scale of railway marketing. In railway marketing, press notices were supplemented by guidebooks and timetables. Popular guidebooks were an effective marketing tool, and they were often cost-effective too. The GWR’s guidebook Holiday Haunts, which circulated 200,000 annually, consistently brought in more than £14,000 to the company throughout the 1930s, when the GWR’s total expenditure on printing publications and posters was around £24,000 per annum (GWR, 1930, p. 33). The ability of railway companies to advertise their own services at numerous railway stations also needs to be taken into account. Station advertisements were a source of revenue. In 1935, public transport operators were making £2.2 million from their commercial advertising (Kaldor and Silverman, 1948, p. 15). Although the figure is a national aggregate, the railway companies could probably subsidise their own advertising expenditure from the revenue.
arising from their advertising service for other industries.

Compared with consumer goods advertising, the scale of railway advertising appears relatively small. Indeed, some of the manufacturers of tangible goods were spending enormous sums on advertising, for example, the tobacco manufacturer, Player & Sons was spending more than £600,000 annually in the 1930s (Hilton, 2000, p. 94). However, this does not drastically change the relative importance of railway publicity. Already in the late 1920s, the LMS, LNER and GWR were spending £60,000 to £120,000 on press advertising, sums equal to the press advertising spending of companies such as Austin, Morris, Shell, Prudential and the BCGC a decade later (GWR, 1934b; LMS, 1929a; Statistical Review of Press Advertising).

Generally speaking, in the railway industry, financial control through budgetary planning was yet to be widely adopted (Quail, 1996, p. 165). Advertising was a fairly exceptional case in this regard. In the case of the LNER, the annual advertising budget was divided into two broad headings of ‘fixed’ expenditure and ‘fluctuating’ expenditure. The items related to excursions and special trains came under the latter heading. By 1938, the advertising budget headings consisted of about 70 items and, at the end of the financial year, these headings were subjected to detailed analysis, while the ratio of advertising expenditure to traffic receipts was calculated for each item. These analyses provided the basis for the following year’s advertising budget (Dandridge, 1938, p. 237; LNER, 1930, p. 389). There is also evidence to show that the LNER’s Advertising Department used the excursion traffic returns for allocating advertising expenditure (LNER, 1925). The existence of budgetary control strongly suggests that railway advertising was a dynamic field of business strategy, rather than something subordinate to the operation of train service. In 1926, Teasledale stated that the monthly statement of passenger bookings was ‘of extremely great value from the advertising point of view’ (LNER, 1925).

In fact, the LNER’s allocation of advertising expenditure did change in response to the business conditions (Table 1). The impact of the Depression is apparent in the drop in most items of the advertising expenditure in 1930, except for press, resorts, overseas and maritime advertising. This
suggests that the LNER tried to weather the storm by promoting tourism, particularly that from overseas. But in 1931, such hope seems to have disappeared, as the decrease in expenditure was across-the-board. Moreover, road-related advertising (both for the company’s own road service and for road competition), suffered a significant blow. The effect of the Depression receded from 1934, when advertising expenditure picked up again. The constant increase of the expenditure on excursion advertising from 1933 until 1938 is especially conspicuous. In 1938, the level of expenditure on that item returned to 87 per cent of the amount spent in 1929, while the expenditure on total traffic advertising recovered only to 81 per cent of the 1929 level.

The relative weight of different items of expenditure points to each company’s general marketing strategy. Promoting resorts, for the LNER, was of secondary importance compared to advertising on ‘train services’, as some historians have noted (Ward, 1998, p. 49). The direct spending on resort promotion was, except for 1938, less than what was spent on overseas promotion. Resort promotion was usually conducted as a collaborative scheme in which a railway company paid 50% of the cost for promoting a specific resort on the premise that the local authority bore the equal amount (Railway Gazette, 1950, p. 507; LMS 1929a; GWR 1928). The Great Depression made the railway companies less eager to invest in this type of resort promotion, a shift in attitude that was reflected in the LNER’s advertising accounts. As discussed above, international traffic was a major item of promotion, which was closely connected to the advertising of waterborne service. Under this category, the largest spending, accounting for more than £10,000 each year between 1929 and 1938, was on the company’s steamboat service connecting English ports with Hook in Holland and Zeebrugge in Belgium. The relatively large sum spent on the steamboat service promotion was justified by the feeder traffic carrying passengers to and from the company’s territory. Similar logic applied to railway hotels. Although less extensive than the LMS’s Scottish hotel business, the LNER operated a number of hotel establishments including the Sandringham Hotel at Hunstanton (Pope, 2000, p. 63). Railway managers recognised that a successful hotel service could attract passenger business, which explained the fairly small but constant spending on hotel advertising.
The railways’ prioritisation of discretionary travel is evident in a contemporary document of the comparative data of the LMS and LNER advertising expenditure, which distinguishes three categories of advertising—press, posters, and guidebooks—according to their target market. In 1928, LMS’s press advertising was both targeted at general traffic (43 per cent) and excursions and other reduced fares travel (57 per cent) while its guides, programmes, and handbills, as well as posters, were overwhelmingly aimed at the latter type of travel (83 per cent for the first three and 82 per cent for the posters) (LMS, 1929a). This shows that, while press advertising promoted both types of travel, other media were used chiefly to advertise excursions and reduced fares.

At any rate, the cost consideration was a significant factor in railway marketing, and it explains why the companies steered towards press advertising, publicity and public relations. Among others, free publicity became an important conduit of information flow to supplement other marketing activities. For that purpose, the companies’ internal report often emphasised the importance of maintaining ‘friendly relations with the Press’ (GWR, 1928). The LMS employed a publicity agent to secure free editorial references to the company, which in 1928 alone, brought in a total of 13,413 free announcements, which according to the company’s estimate, saved the company £73,771 (LMS, 1929a). A similar effort was made by the GWR, in which Maxwell Fraser of the Publicity Department sent numerous contributions to newspapers (Wilson, 1970, p. 46).

Cost-consciousness among the railway companies also helped, to some extent, to overcome long-standing rivalry among the railway companies, and, as a consequence, joint press advertising gradually became an established practice.
The available evidence suggests that the railway companies were continuously adjusting their advertising expenditure, both the total amount and the allocation to different media, in view of improving the effectiveness and efficiency of its promotional activities. Yet, considering that the railway companies came to use free publicity and public relations techniques as well as publicity media that were sold to potential customers, the examination of expenditure needs to be regarded as showing just one aspect of railway marketing. In other words, railway marketing during the interwar period became a more knowledge-based and less capital intensive endeavour than in the previous period: this further encouraged the coordination of railway business in which scale economy in advertising could have achieved by joint marketing efforts.

Marketing Alliance and the Birth of the ‘British Railways’

The railways’ embracing of public relations, and the shift to knowledge-based publicity, indicate the growing ‘image consciousness’ present among the railway companies, which went beyond individual company (Casson, 2009, p. 309). A forum to discuss various railway matters existed from the 1840s in the form of the Railway Clearing House (RCH). The RCH was established in 1842 to facilitate inter-company financial transactions, especially those related to passenger travel across more than one company (‘through’ traffic). In the late nineteenth century, the organisation, under the aegis of the majority of railway companies, rapidly expanded its operations, and came to cover wide-ranging operational and policy matters.

The standardisation of railway operation and commercial practice was largely achieved by coordination at the RCH, compensating for the operational difficulties stemming from the existence of numerous privately-run railway companies. Supposedly, the need for RCH’s function in standardisation diminished after the grouping of the railway companies in 1923. However, as Edwards has recently argued, the role of the RCH was not so much diminished as changed, and in some areas, it was rather expanded (Edwards, 2008, pp. 1–2). Advertising, publicity and public relations were examples of the changing role of the RCH. From the 1860s to the 1900s, the railway
companies managed the amount of advertising through the RCH’s Conference of Superintendents and that of Advertising Representatives. The RCH’s advertising oversight was abandoned in 1906 when discord among the railway companies over advertising restrictions made some companies militate against the coordination process (Shin, 2014, pp. 200–201; RCH, 1907). After the First World War, the RCH meeting was revived, and the Big Four’s advertising officers again regularly met to discuss issues pertaining to marketing issues (RCH, 1919).

The RCH Advertising Committee was widely regarded as the public front for the railway industry. The meeting regularly received various requests, solicitations, and information from diverse groups outside the railway industry. The railway companies dealing with the mass media also came to be coordinated by the RCH. In 1928, the RCH decided to include public relations in its remit and, accordingly, the committee was renamed as the Advertising and Public Relations Committee. At the same time, the Railways Information Bureau was renamed as the British Railways’ Press Bureau, which distributed the publicity materials of the railway industry, being probably one of the earliest examples of a commercial industry issuing press releases (RCH, 1928; LNER, 1924b). From 1935, this arrangement was further institutionalised in the shape of the RCH Press Sub-Committee.

The railway companies’ close coordination of publicity and public relations at the industry level showed that the railway industry was keeping steps with the growing trend of product-based marketing alliances (Taylor, 1934, p. 28). The gas industry had an industry-wide publicity group in the form of the British Commercial Gas Association, which was set up in 1912, and the electricity industry created the Electrical Development Association in 1919 (Darling, 2007, p. 139). Similarly, from the late 1920s, the large oil companies collaborated with each other on marketing, and from 1933, the brewing industry started its Collective Advertising Campaign (Brown, 1993, p. 356; Gourvish, 1994, pp. 352–353). For its origin, the railway industry’s advertising coordination in the RCH, which started in the 1860s, was one of the earliest. Just as the inter-firm competition in the later nineteenth century gave birth to an industry-wide coordination of railway advertising, the inter-modal competition in the interwar period increased and strengthened the railway industry’s
marketing alliance.

The RCH Advertising Committee did not directly influence the advertising policies of individual companies, but instead concentrated on arranging joint publicity efforts (Orton, 1936, p. 33). The four companies issued joint-advertisements, which, at first, had four names, though later they started to use the identifier ‘British Railways’. Also, the railway companies’ began to make collaborative efforts in trade fares and exhibitions, usually coordinated by the RCH committee. In one of their earliest joint enterprises in 1927, the railway companies participated in the Olympia Advertising Exhibition as the ‘British Railways’ (Figure 3) (GWR, 1927, pp. 318–320). Thenceforward, joint publicity became a visible trend. In addition, the introduction of new service products came to be coordinated to some extent. For example, the highly successful ‘summer ticket’ was introduced in 1933 by all the Big Four, showing that the railway companies’ joint marketing now extended to product introduction (LMS, 1934; LMS, 1946, p. 17).

Insert Figure 3 About Here

Figure 3. “British Railways” at Advertising Exhibition, Olympia

Source: *GWR Magazine* (1927), p. 318

The joint sales activities were also apparent in the overseas activities of Britain’s railways. The Big Four had operated overseas offices, mostly to promote international tourism, since as early as 1907 (RCH, 1926; British Transport Commission, 1957; GWR, 1907; Smith, 1988, p. 157). By the late 1920s, for example, the LMS had established offices in Paris, Brussels, Antwerp, St Malo and the Channel Islands, as well as a number of agents throughout Europe, the US and Canada. Overseas offices of the individual companies often worked together, and in some cases, like the Associated British Railways Inc., even merged their activities (GWR, 1929b). Around the time of the Olympia
Exhibition in 1927, the RCH’s advertising committee expressed the need to ‘sink the individuality’ for advertising in the United States. It was based on this collaborative ethos that the US office of the Associated British Railways Inc. was established in 1934. The ‘Come to Britain’ movement was formed around the same time, which was no coincidence (Beckerson, 2003, p. 112; Day, 1981, pp. 90–93; Ward, 1998, pp. 46–47). This movement started in 1926 as the initiative of Sir Francis Towle of Gordon Hotels who was a son of the former catering manager of the Midland Railway, one of the predecessors of the LMS (Advisory Committee to the Department of Overseas Trade, n.d.; The Times, 1926). The involvement of the railway companies in this international tourism promotion was apparent from the earliest stage. When the Travel Association of Britain took over the movement in 1929, the GWR’s General Manager Felix Pole was among its six provisional committee members (Taylor, 1981, p. 94; Wilson, 1970, p. 34).

Insert Figure 4 About Here

Figure 4. British Railway Office, designed by H. T. Cadbury Brown, 1936

Source: Royal Institute of British Architects (RIBA) Collections, SD59/3

The British Railways, in the form of a collective service brand of the four railway companies, came into existence in the domestic travel market in the 1930s. An example of the railway companies’ collective branding was the ‘British Railways’ ticket offices (Dandridge, 1938, pp. 236–237). Each of the Big Four had, by the interwar period, developed a network of ticket sales offices. In 1935, the GWR’s list of ticket sales points—excluding railway stations—referred to at least 269 of them, including three British Railway Offices (GWR, 1935). In 1936, the railway companies, along with the Royal Institute of British Architects, held a competition for the architectural design of railway offices in London, with H. T. Cadbury-Brown’s design winning first place (Figure 4) (RIBA, 1936, pp. 60, 107). The new, standard design was to be implemented in 71 railway offices across London, of which
at least two were actually built (in Queensway and the Strand) before the Second World War
(Dandridge, 1938, p. 237; The Times, 1939). The modernist style of the British Railways office,
designed along simple lines which matched the British Railways’ logo in Sans Serif, anticipated the
office design of the 1960s, making it a striking contrast with cluttered station ticket offices or
shop-style town offices of the previous period. The inter-availability of tickets had already been
achieved before the establishment of the British Railways’ office, but the joint sales office, with a
standardised design, was well beyond simple joint sales. The marketing alliances of the Big Four were
thus anything but an ad-hoc publicity arrangement: rather, it was an eloquent testimony to the height
that the railways’ marketing had reached in the late 1930s.

Conclusion

This paper's examination of the marketing organisation of the Big Four railway companies reveals
that Britain's mainline railway companies had developed a highly sophisticated marketing machinery
by the 1930s. All the four companies had internal departments that were led by expert marketers who
often came from outside the railway industry. Railway marketing benefitted from a growing pool of
marketing experts and their specialised knowledge. The companies also invested a substantial amount
of financial resources in their marketing activity, and, at the same time, carefully managed
expenditure in view of the broader business conditions. Far from being an industry without a
marketing strategy, the Big Four companies from the mid-1920s were at the forefront of service
marketing development. Contemporary marketing professionals generally regarded railway marketers
as seasoned experts in the art of advertising. Tom Purvis, the well-established commercial poster
artist, described LNER’s William Teasdale and C. G. Dandridge as ‘two of the most appreciated and
sympathetic men it has been any artist’s delight to work for… stand out to me as shining examples of
artists in commerce’ (Purvis, 1930, p. 12). In contrast, Purvis regarded Jack Beddington of Shell ‘a
comparative newcomer to advertising’. In interwar Britain's marketing world, railway companies
undoubtedly had a conspicuous presence.
As a number of cultural historians have demonstrated that railway art flourished during the interwar period (Cole and Durack, 1992; Hewitt, 1995 and 2000; Watts, 2004). By the 1920s, railway posters had become an established form of commercial art, and the inter-firm and inter-modal competition of the time stimulated its further development. In 1924, the advertising consultant Thomas Russell noted that railway advertising featuring ‘a locomotive’ belonged to the generation of ‘our grandfathers’, and modern advertising should focus on ‘not the product but the service it gives’ (Russell, 1924, p. 550). Although locomotives still appeared in railway posters, especially when express trains were being promoted, the focus of railway posters in the interwar years was less on brute mechanical speed than on the smooth riding of the train embedded within Britain’s natural landscape (Shin and Divall, 2011). Generally speaking, railway posters kept up with—and in some
cases led the way in—the contemporary development of commercial art. Travelling experience was depicted not just as comfortable but also as glamorous and luxurious, as shown in the LNER’s 1935 poster promoting restaurant cars (Robinson-Tomsett, 2016, pp. 50–53). In this poster by Tom Purvis, a lady in a modern dress enjoys a cigarette and a cup of coffee at the dining table—a scene that could just as well have been set in an up-market restaurant in London rather than in a train carriage (Figure 5). Travel destinations remained a favourite theme of posters, but an increasing number of posters featured generic scenery of the seaside or countryside and were concerned less with the peculiar quality of the place than with the activities one could enjoy at the destination, like swimming, hiking, golfing and shopping. (Figure 6) The images of playing children frequently appeared in posters and guidebooks, targeting family holiday makers by appealing to the parents’ sense of duty to their children (Figure 7; Medcalf, 2011). While the themes in poster illustration diversified, the format of railway posters became increasingly standardised within a company, with company logos and fonts expressing brand identity, distinguishing one company from another (Hewitt p. 298; Cole and Durack, 1992, p. 17). In the 1930s, however, in line with the marketing alliance in the railway industry, collective advertising by the Big Four companies became a new trend, promoting overseas travel and introducing new services such as household removals, cash on delivery services and discounted return tickets for dogs (Figure 8). Railway posters thus reflected the wider development in the railway industry’s marketing strategy and organisation.

The series of re-organisations in the Big Four’s marketing departments in the late 1920s showed that railway marketing did not stand still, but evolved in order to adjust to the changing business situation. The adoption of market research and closer collaboration between companies through the RCH were clear testimony that Britain’s railways embraced modern marketing ideas. Simultaneously, the timing of the re-organisation is suggestive of the underlying business rationale for the Big Four’s revision and expansion of their marketing departments. The late 1920s were the time when the main line companies came to the realisation that rail travel was losing out to rapidly developing road traffic. The railways’ chief competitor was the motorbus, but private cars were also
eroding the Big Four’s customer base. Railway managers were by no means optimistic about the future of rail travel. In 1928, the GWR Traffic Department noted that ‘the consistent and rapid growth in the number of private cars is a serious menace to the railway companies and there is little to be done to attract this class of traffic’ (GWR, 1928). Railway marketing was accompanied by the sense of decline in the rail business. The marketing strategy centred around reduced fare travel—criticised by some historians and commentators as an imprudent business decision that would contribute to a dilution of passenger revenue—made more sense as the railways’ rear-guard battle against road competition rather than expansionary business tactics (Aldcroft, 1968, pp. 61–63; ; Fenelon, 1939, p. 139; Butterfield, 1986, p. 35).

The degree to which railway marketing worked to improve the industry’s performance in the inter-modal competition requires further examination. What is clear from this paper’s review of railway marketing is that a plausible assessment of railways’ passenger business in interwar Britain needs to incorporate the railway companies’ marketing strategy. Marketing played a pivotal role in the railways’ commercial policy such as promoting reduced fares, introducing new facilities and enticing people to travel. It is also important to give equal attention to the successes and failures of railway marketing. The Big Four’s marketing might have contributed to the arrest or slowdown of the decline of their passenger business, but there is also the possibility that the companies could improve their business conditions by investing more in, for example, expanding high-speed service, better point-to-point connection or standard fare travel. After all, an evaluation of railway marketing should be linked with the railways’ business performance. However, the decline of railways’ passenger business cannot be attributed to the absence of marketing strategy—rather, the decline occurred despite the fairly advanced state of railway marketing. By acknowledging the place of marketing in the railway business, we would begin to understand how the golden age of railway advertising coincided with the commercial failure of the railways’ passenger business in interwar Britain.

Notes
1. The railway industry’s passenger returns were divided into full-fare and reduced fares. The four main categories of reduced fares were excursion tickets, workmen’s tickets, season tickets and tourist tickets. Tourist tickets were originally sold only during summer holiday season, but in the early 1930s, their sales period was eventually extended to all year. Around the same time, the variety of excursion tickets expanded to include discount tickets on special excursion trains (serving tourist destinations like pleasure and health resorts and special events like race meetings, football matches and Christmas shopping), day, half-day, weekend, period and monthly return tickets on both short and long-distance routes. Effectively, excursion tickets became a category that covered various types of reduced price tickets.

References

Advisory Committee to the Department of Overseas Trade (n.d.), “Come to Britain Movement”, TNA (the National Archives, Kew), BT 90/24.


GWR (Great Western Railway) (1907), “Minutes of Traffic Committee”, 11 April 1907, RAIL 250/345.


GWR (1927), GWR Magazine, Vol. 39 No. 8


GWR (1929a), GWR Magazine, Vol. 41 No.4.


GWR (1930), Holiday Haunts, January 1930.

GWR (1934a), GWR Magazine, Vol. 46 No.9.


GWR (1943), GWR Magazine, 55.4.


LMS (1946), *A record of large-scale organisation and management, 1923–1946*, London, LMS.


LNER (1928a), LNER Magazine, Vol. 18 No. 3.

LNER (1928b), LNER Magazine, Vol. 18 No. 12.

LNER (1929), LNER Magazine, Vol. 19 No. 5.


North Eastern Railway (1921), North Eastern Magazine, Vol. 2 No. 121.


Patmore, J. (1966), “The contraction of the network of railway passenger services in England and


*Railway Gazette*, “Mr. T. C. Jeffrey”, 9 March 1923, p. 426.

*Railway Gazette*, “Railway and resorts combined publicity”, 8 December 1950, pp. 75–78.

*Railway Magazine*, “What the railways are doing”, 26 July 1926.

RCH (Railway Clearing House) (1907), “Minutes of Meeting of Advertising Representatives”, 23 April 1907, TNA, RAIL 1080/133.


RCH (1928), “Minute of Special Meeting of Advertising (Publicity) Representatives”, 21 Nov. 1928, TNA, RAIL 1080/584.

RCA (Railway Companies’ Association) (1932), “Memorandum to the Minister of Transport upon the Position of Main Line Railway Companies in relation to Road Transport Competition”, TNA, RAIL 1099/3.
RIBA (Royal Institute of British Architects) (1936), *Journal of the Royal Institute of British Architects*, 21 November 1936.


SR (Southern Railway) (1930a), *Southern Railway Magazine*, Vol. 8 No. 87.

SR (1930b), *Southern Railway Magazine*, Vol. 8 No. 89.

SR (1933), *Southern Railway Magazine*, Vol. 11 No. 129.


<table>
<thead>
<tr>
<th>Category</th>
<th>1929</th>
<th>1930</th>
<th>1931</th>
<th>1932</th>
<th>1933</th>
<th>1934</th>
<th>1935</th>
<th>1936</th>
<th>1937</th>
<th>1938</th>
<th>(1929=1.00)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publications</td>
<td>38,262</td>
<td>35,261</td>
<td>23,434</td>
<td>23,950</td>
<td>22,881</td>
<td>23,207</td>
<td>23,939</td>
<td>23,299</td>
<td>23,222</td>
<td>25,989</td>
<td>0.68</td>
</tr>
<tr>
<td>Press</td>
<td>21,360</td>
<td>25,145</td>
<td>12,631</td>
<td>14,570</td>
<td>12,133</td>
<td>13,178</td>
<td>13,933</td>
<td>11,525</td>
<td>11,400</td>
<td>10,995</td>
<td>0.51</td>
</tr>
<tr>
<td>Resorts</td>
<td>17,630</td>
<td>19,546</td>
<td>16,113</td>
<td>14,558</td>
<td>10,365</td>
<td>11,765</td>
<td>10,991</td>
<td>10,937</td>
<td>11,765</td>
<td>13,545</td>
<td>0.77</td>
</tr>
<tr>
<td>Train Services</td>
<td>37,093</td>
<td>34,322</td>
<td>26,421</td>
<td>24,688</td>
<td>24,223</td>
<td>25,869</td>
<td>26,712</td>
<td>26,051</td>
<td>32,611</td>
<td>31,356</td>
<td>0.85</td>
</tr>
<tr>
<td>Posters and Bills</td>
<td>19,999</td>
<td>16,181</td>
<td>13,863</td>
<td>14,899</td>
<td>12,644</td>
<td>13,207</td>
<td>12,665</td>
<td>14,519</td>
<td>15,729</td>
<td>14,671</td>
<td>0.73</td>
</tr>
<tr>
<td>Excursion</td>
<td>120,288</td>
<td>100,040</td>
<td>79,740</td>
<td>75,815</td>
<td>80,100</td>
<td>85,802</td>
<td>93,308</td>
<td>98,237</td>
<td>103,403</td>
<td>104,553</td>
<td>0.87</td>
</tr>
<tr>
<td>Sea, Canal, Docks etc.</td>
<td>21,491</td>
<td>23,079</td>
<td>19,500</td>
<td>14,470</td>
<td>14,475</td>
<td>16,699</td>
<td>13,977</td>
<td>13,767</td>
<td>14,830</td>
<td>13,317</td>
<td>0.62</td>
</tr>
<tr>
<td>Hotels</td>
<td>4,008</td>
<td>3,185</td>
<td>3,881</td>
<td>4,236</td>
<td>3,734</td>
<td>3,697</td>
<td>4,539</td>
<td>3,877</td>
<td>3,646</td>
<td>4,414</td>
<td>1.10</td>
</tr>
<tr>
<td>Office Expenses and Salary</td>
<td>31,947</td>
<td>32,402</td>
<td>30,488</td>
<td>29,706</td>
<td>29,410</td>
<td>29,287</td>
<td>29,952</td>
<td>30,546</td>
<td>30,432</td>
<td>31,364</td>
<td>0.98</td>
</tr>
<tr>
<td>Road</td>
<td>9,915</td>
<td>5,085</td>
<td>2,603</td>
<td>2,107</td>
<td>2,092</td>
<td>2,065</td>
<td>2,130</td>
<td>1,820</td>
<td>1,760</td>
<td>1,068</td>
<td>0.11</td>
</tr>
<tr>
<td>Goods Department</td>
<td>1,476</td>
<td>1,182</td>
<td>1,116</td>
<td>1,420</td>
<td>992</td>
<td>1,411</td>
<td>1,704</td>
<td>3,474</td>
<td>2,550</td>
<td>5,159</td>
<td>3.50</td>
</tr>
<tr>
<td>Others</td>
<td>7,559</td>
<td>7,976</td>
<td>5,142</td>
<td>6,236</td>
<td>6,215</td>
<td>6,280</td>
<td>7,307</td>
<td>7,087</td>
<td>8,168</td>
<td>13,370</td>
<td>1.77</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>352,532</td>
<td>325,060</td>
<td>255,981</td>
<td>247,348</td>
<td>235,153</td>
<td>251,217</td>
<td>257,938</td>
<td>259,611</td>
<td>271,399</td>
<td>282,984</td>
<td>0.80</td>
</tr>
</tbody>
</table>
Figure 1. Big Four Passenger Revenue, 1924–1938
Source: TNA, RAIL 398/42–55

360x272mm (144 x 144 DPI)
Figure 2. Big Four Passenger Receipts by Ticket Type, 1923–1937
Source: Railway Returns, various years

359x214mm (144 x 144 DPI)
Figure 3. "British Railways" at Advertising Exhibition, Olympia
Source: GWR Magazine (1927), p. 318

469x291mm (144 x 144 DPI)
Figure 4. British Railway Office, designed by H. T. Cadbury Brown, 1936
Source: Royal Institute of British Architects (RIBA) Collections, SD59/3

207x141mm (150 x 150 DPI)
Figure 5. LNER, "Dine Well by LNER" by Tom Purvis, 1935
Source: NRM 1978-8940, ©Science & Society Picture Library

233x184mm (150 x 150 DPI)
Figure 6. SR, “Hike for Health”, printed by The Baynard Press, c.1930
Source: NRM 1996-7432, ©Science & Society Picture Library

296x480mm (150 x 150 DPI)
Figure 7. LNER, "East Coast Joys" by Tom Purvis, 1932
Source: NRM 1978-9362, ©Science & Society Picture Library

296x470mm (150 x 150 DPI)
Figure 8. GWR/LMS/LNER/SR, "Take Your Dog", by Mabel Gear, c.1935
Source: NRM 1978-9637, ©Science & Society Picture Library

296x478mm (150 x 150 DPI)