What passengers want from the East Coast rail franchise

An initial submission from Passenger Focus

May 2012

Passengerfocus
putting passengers first

Contents

Appendices

1. Passenger Focus

Passenger Focus is the independent public body set up by the Government to protect the interests of Britain's rail passengers, England’s bus and tram passengers outside London and coach passengers in England on scheduled domestic services. We are funded by the Department for Transport (DfT) but operate independently.

Our mission is to get the best deal for passengers. With a strong emphasis on evidence-based campaigning and research, we ensure that we know what is happening on the ground. We use our knowledge to influence decisions on behalf of passengers and we work with the industry, passenger groups and government to secure journey improvements.

Passenger Focus welcomes the opportunity to provide an initial analysis and recommendations for the East Coast franchise.

2. Introduction

It is important that the new franchise is successful. The two previous versions have, for various reasons, not ended well and this lack of continuity has contributed to what has sometimes felt like a short-term approach or attitude. A new franchise creates a chance to redevelop a longer-term vision/strategy and to drive-up the quality of service offered to passengers.

Passenger Focus believes that when the requirements of the franchise are established, it is vital that the needs of passengers who use and pay for rail services are placed squarely at the heart of the contract. Our research in 2009 with over 6000 East Coast passengers along with the National Passenger Survey (NPS) provides a strong evidence base for what passengers' want. Three clear passenger priorities emerge: punctuality, value for money and getting a seat. We look forward to working with the DfT and short-listed bidders in delivering these.

The specification must build on the existing framework of services and seek progressive improvements in all areas of performance. It is important that the franchise ensures that existing demands are adequately addressed and, that at appropriate stages, franchise reviews can respond to any changes or inaccuracies in planning assumptions.

It is equally important that, throughout its duration, the franchise remains responsive to changing passenger needs. This means that not only must there be a clear understanding of passenger requirements at the outset but that there is an ongoing emphasis on consultation and engagement with stakeholders and a set of output measures that reflect passenger satisfaction. The National Passenger Survey should be included within the franchise monitoring mechanisms.

Longer franchises require firm commitments to be met by the operator on given dates and these must be transparent, clearly defined and monitored. The franchise should focus on outcomes for passengers and ensure that there are sanctions available to reflect any failure in delivery. The ultimate sanction should be termination.

We set out below our priorities for the new franchise. This is based on:

- Bespoke research into passenger priorities carried out in 2009 to inform the previous franchise specification exercise. This encompassed qualitative and quantitative research – attached as Appendix A and B respectively. Much of the research remains relevant and is referenced within the main body of our submission. However there has since been a major change to the timetable (May 2011) which means that some of the findings on service patterns and frequencies are no longer applicable.
- National Passenger Survey (NPS)
  NPS, together with an analysis of the drivers of satisfaction and dissatisfaction, is a comprehensive source of information about passenger perceptions and can also be broken down to show variations across the East Coast service groups.
- Passenger complaint data (complaints received by Passenger Focus).
- Generic subject specific research (as referenced within the text).

3. Passenger research and implications for the franchise

3.1 Passenger Priorities

Passenger Focus's September 2009 research asked over 6000 East Coast passengers about their priorities for improvement. The table below shows the overall results for the franchise as a whole – priorities for the individual routes can be seen in Appendix B. These are in line with similar work at a national level and mirror themes identified in more recent work to inform the West Coast and Greater Western franchises. So, even allowing for the time elapsed, this remains a relevant starting point for the new franchise specification.

Priorities for improvement	Rank (1=highest priority and 12=lowest)
Punctuality and reliability of the train	1
Value for money for the price of the ticket	2
Being able to get a seat on the train	3
Length of time the journey was scheduled to take (speed)	4
Facilities and services on board the train	5
Frequency of trains for this journey	6
Provision of information about train times/platforms	7
Personal security while on board the train	8
Personal security at the station	9
Ticket-buying facilities	10
Ease of getting to and from the station	11
Facilities and services at the station	12

Passenger Priorities for Improvement. 2009

3.2 National Passenger Survey and drivers of satisfaction and dissatisfaction

3.2.1. Passenger Satisfaction

The NPS gives a comprehensive view of passenger satisfaction over a range of train and station based criteria. The table below shows satisfaction for East Coast passengers against the average scores for the long distance sector as a whole. The TOC index figure shows whether (and the extent to which) East Coast is above or below the average: scores above 100% indicate a higher than average score while those below 100 show a lower than average performance. While East Coast tends to be under the average score for station criteria it is above for most of the on train criteria.

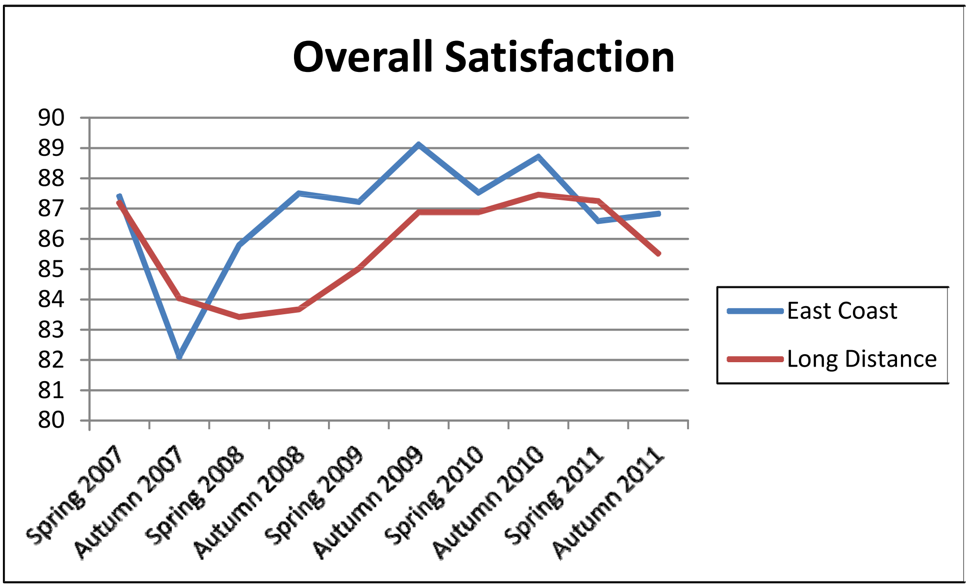
NPS Attribute Autumn 2011	East Coast % satisfied or good	Long distance Sector % satisfied/good	TOC index
Overall satisfaction	87	86	102%

Overall station satisfaction	76	81	94%
Ticket buying facilities	81	84	97%
Provision of information about train times/platforms	85	86	99%
Upkeep/repair of station buildings/platforms	66	73	91%
Cleanliness of stations	73	77	94%
Facilities and services at stations	60	65	92%
Attitudes and helpfulness of staff at stations	75	77	98%
Connections with other forms of public transport	80	74	107%
Facilities for car parking	56	62	90%
Overall station environment	66	74	89%
Your personal security whilst using the station	70	74	95%
Availability of staff at the station	66	66	100%
How request to station staff was handled	86	87	99%

Frequency of trains on that route	89	84	106%
Punctuality and reliability	78	83	95%
Length of time the journey was scheduled to take	88	88	100%
Connections with other train services	79	79	99%
Value for money for the price of your ticket	57	56	102%
Upkeep and repair of the train	81	84	97%
Provision of information during the journey	80	76	105%
Helpfulness and attitude of staff on the train	80	79	102%
Space for luggage on the train	61	53	114%
Toilet facilities on the train	55	52	106%
Sufficient room for all passengers to sit/stand	79	70	113%
Comfort of the seating area on the train	81	79	103%
Ease of being able to get on and off the train	84	82	102%
Your personal security whilst on board the train	86	84	103%
Cleanliness of the inside of the train	85	82	103%
Cleanliness of the outside of the train	78	79	99%
Availability of staff on the train	70	66	106%
How well train company deals with delays	56	50	111%

3.2.2 Satisfaction - trend

Looking at satisfaction over the last ten waves (five years) shows that East Coast traditionally outperforms the average for the long distance sector but that the gap is narrowing.



3.2.3 Satisfaction – building blocks

Passenger Focus also disaggregates overall satisfaction into route groups (referred to as building blocks). The East Coast franchise is currently split into four building blocks:

- London – East Midlands/East.
- London – Scotland/North East.
- London – Yorkshire.
- Non-London journeys.

The following table looks at satisfaction for each of these building blocks and compares this with the average for the entire franchise. There are some notable differences between the different sectors which are masked by the overall average.

Station Factors (% satisfied) NPS Autumn 2011	East Coast as a whole	London to East Midlands/East	London to Scotland/ North East	London to Yorkshire	Non-London Journeys
Overall satisfaction	87	93	86	87	85
Overall satisfaction with the station	76	80	74	69	83
Ticket buying facilities	81	71	82	80	86
Provision of information about train times/platforms	85	92	85	83	86
The upkeep/repair of the station buildings/platforms	66	66	61	59	76
Cleanliness	73	70	69	68	80
The facilities and services	60	56	56	51	72

The attitudes and helpfulness of the staff	75	71	75	70	82
Connections with other forms of public transport	80	82	79	82	76
Facilities for car parking	56	66	42	47	62
Overall environment	66	66	61	57	76
Your personal security whilst using	70	66	66	65	79
The availability of staff	66	71	60	63	70
How request to station staff was handled	86	69	84	85	92

5% points higher than average

5% points lower than average

Train Factors (% satisfied) NPS Autumn 2011	East Coast as a whole	London to East Midlands /East	London to Scotland/ North East	London to Yorkshire	Non-London Journeys
The frequency of the trains on that route	89	88	94	92	83
Punctuality/reliability (i.e. the train arriving/departing on time)	78	78	86	79	73
The length of time the journey was scheduled to take (speed)	88	91	86	88	90
Connections with other train services	79	83	79	83	74
Value for money for the price of your ticket	57	59	58	53	60
Cleanliness of the train	84	83	84	87	82
Upkeep and repair of the train	81	80	80	80	82
The provision of information during the journey	80	75	85	81	77
The helpfulness and attitude of staff on train	80	84	87	82	72
The space for luggage	61	59	63	63	58
The toilet facilities	55	61	53	56	54
Sufficient room for all passengers to sit/stand	79	74	77	85	77
The comfort of the seating area	81	81	77	82	84
The ease of being able to get on and off	84	82	87	88	79
Your personal security on board	86	85	87	85	87
The cleanliness of the inside	85	86	81	88	84
The cleanliness of the outside	78	81	76	78	79
The availability of staff	70	70	79	70	64
How well train company deals with delays	56	66	55	56	52

5% points higher than average

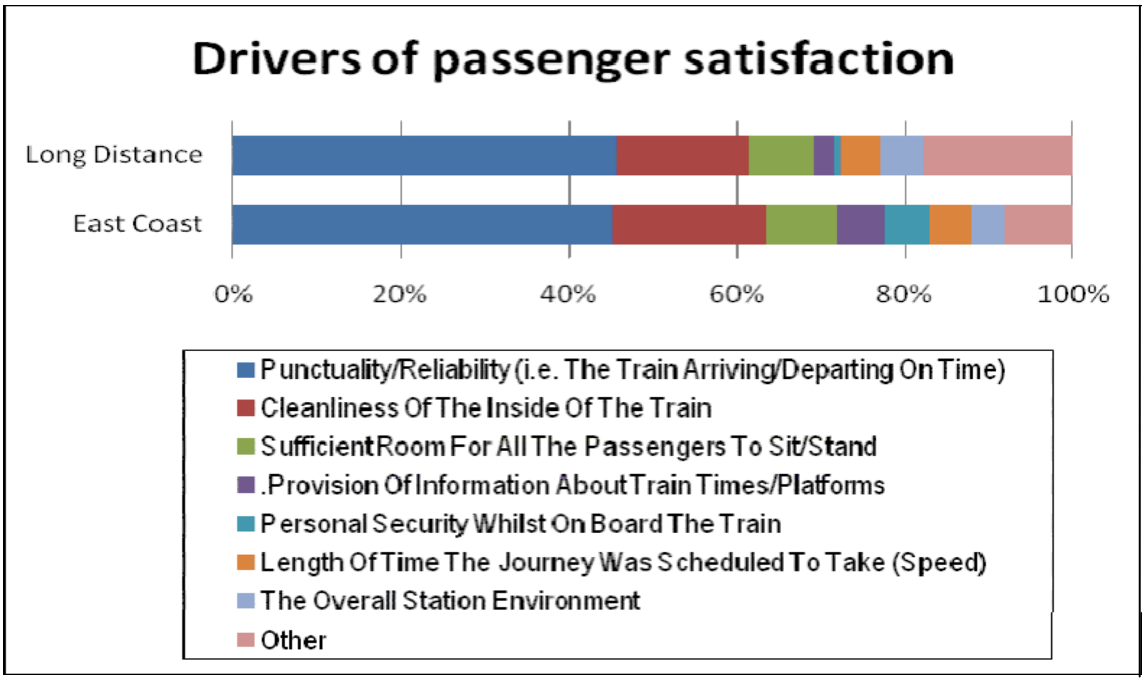
5% points lower than average

3.2.4 Drivers of satisfaction and dissatisfaction

Analysis of NPS results for Autumn 2011 suggests that the top three factors 'driving' overall satisfaction among East Coast passengers are:

- Punctuality and reliability (45% contribution).
- Cleanliness of the inside of the train (18% contribution).
- Sufficient space to sit and stand (8% contribution).

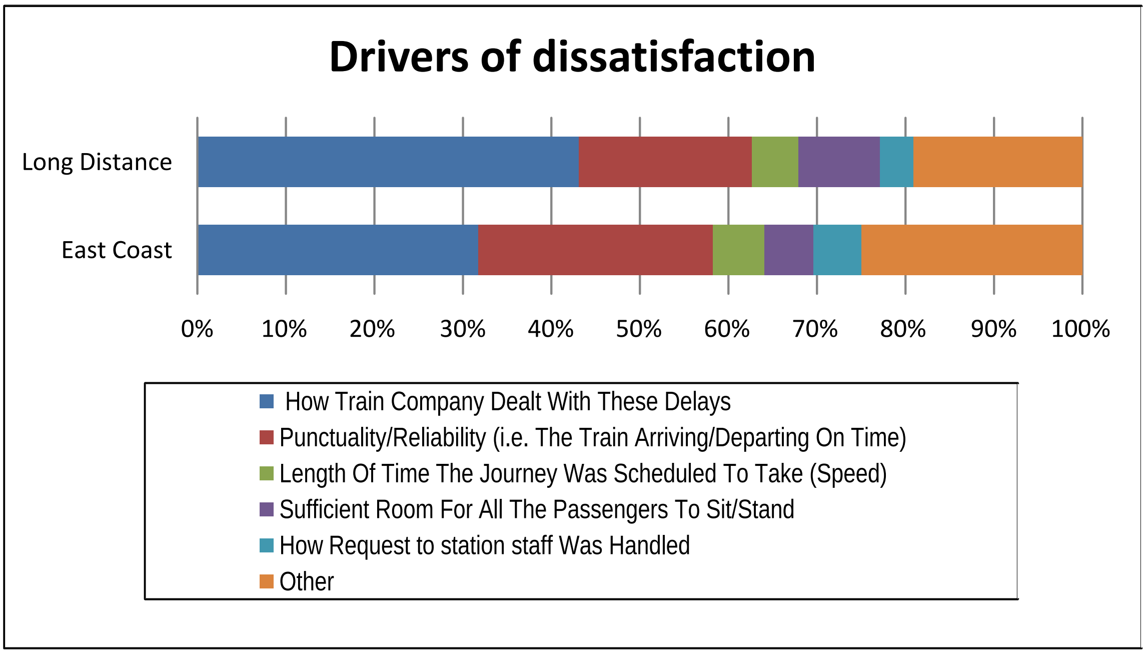
This is virtually identical to the long distance sector as a whole.



Similar analysis suggests that the top three factors 'driving' overall dissatisfaction are:

- How the train company dealt with delays (32% contribution).
- Punctuality/reliability (27% contribution).
- Journey time (6% contribution); and
- Sufficient space to sit and stand (6% contribution).

The pattern again mirrors that for the long distance sector – though the percentages are not quite as close as with satisfaction.



Recommendation 1: Giving passengers a voice in the new franchise

The ultimate measure of whether a train company is performing well is whether passengers are happy with the quality of service provided. This is good from a commercial perspective as well as a customer service one as recent conclusions on passenger demand forecasting[1] suggest that service quality does have an impact on levels of demand.

The DfT's specification for the new franchise must stretch the successful bidder to take East Coast passenger satisfaction to higher levels. As we can see from the analysis above this should apply both for the franchise as a whole and at a building block level where there is a need to bring the worst areas up to the performance of the best – simply relying on overall scores risks masking these areas of poor performance. With the drive towards longer franchises it will also be important to ensure that the targets/measures used are flexible enough to cope with changing perceptions over time. What is a priority, for instance, in year one may not be so by year 10.

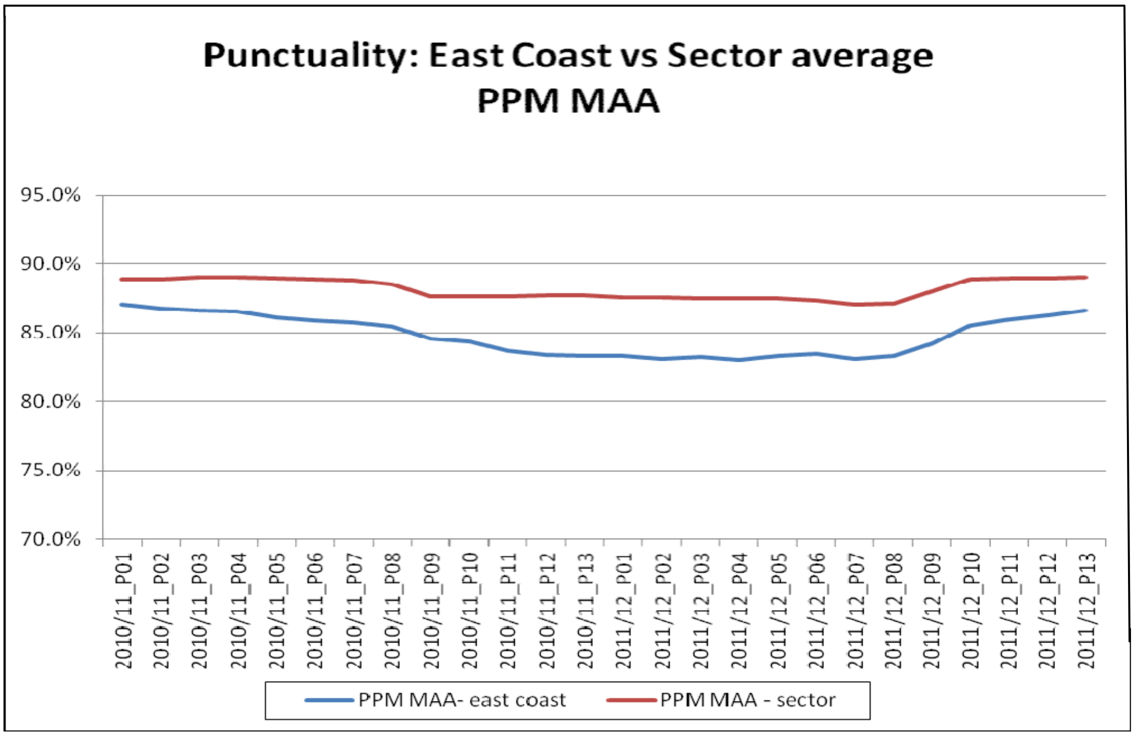
The National Passenger Survey (NPS) is ideally suited to capture this information. NPS has a large sample size covering around 1100 East Coast passengers each wave. The sampling plan ensures that it is representative of day of travel, journey purpose (commuter, business and leisure), and, of course, by a range of demographic attributes (age, sex, ethnicity etc).

Bidders for the new franchise should be asked to submit bids that include plans on how to improve NPS scores. Passenger Focus recommends the setting of NPS targets within the franchise. This could be done, as now, in terms of composite targets for stations, trains and customer service for each service group. Alternative methods might include using individual criteria that are weighted in terms of how important they are to passengers. We would be pleased to talk to the DfT and bidders about the options available.

[1] Revisiting the elasticity based framework. DfT. April 2012

3.3 Punctuality and reliability

Punctuality (as measured by PPM Moving Annual Average) has improved in recent months after a prolonged period of decline. However, it still remains below the average for the long distance sector.



Our research above shows that punctuality is both the highest priority for improvement and the main driver of overall passenger satisfaction. In order to better understand this relationship we carried out a much more in depth look at the correlation between satisfaction with punctuality and actual performance.

An initial study was conducted on London commuter services with National Express East Anglia[2], with two further studies carried out on Northern Rail regional commuter services (into and from Manchester) and on longer distance journeys with CrossCountry[3]. The research found:

- Average lateness experienced by passengers is worse than that recorded for train services. This is because of the effect of cancellations and because many trains that are on time at their destination are late at intermediate stations;
- On average, passenger satisfaction with punctuality reduces by between two and three percentage points with every minute of delay;
- Commuters (except those travelling long distances) notice lateness after one minute of delay, not just after the five or ten minutes allowed by PPM. Their satisfaction with punctuality falls by an average of five percentage points per minute during the initial period of delay;
- Business and leisure users and long distance commuters tend to change their level of satisfaction with punctuality after a delay of four to six minutes.

[2] Towards a 'right time' East Anglian railway. Passenger Focus. March 2010

[3] Improving Punctuality for Passengers. Passenger Focus. February 2011.

We have also conducted a similar analysis on East Coast[4]. The research report can be found at Appendix C. This research, which looked back over four years of performance data, confirms the broad themes identified in the earlier reports. In particular it found that:

- On average, passenger satisfaction with punctuality falls by 2% for every additional minute of lateness;
- The rate at which satisfaction with punctuality varies is not constant: there appear to be a series of 'tipping points' at 2-4, 5-6 and 8-10 minutes of lateness suffered;
- Perception of delay varies by frequency of travel and more frequent travellers are generally less satisfied and more sensitive to delay than those who don't travel as often. This largely explains why commuters and shorter-distance travellers appear less satisfied than longer-distance passengers for the same level of delay;
- Passengers travelling to intermediate stations experience higher levels of small delays than those travelling to stations at which the train terminates.

We believe that this raises two key issues that must be addressed by the industry:

- Measuring punctuality at intermediate stations rather than just at the destination. As PPM measures performance at the final station it is possible for passengers en-route to be late arriving at their station only for the 'empty' train to arrive on time – in other words the train is on time despite most of the passengers being late.
- Adequacy of the existing 10 minute 'allowance' when determining delay and whether a new threshold needs to be considered.

The research shows that passengers do not view a train arriving up to 10 minutes after its scheduled time as being on-time. As punctuality is the main driver of overall passenger satisfaction it follows that greater adherence to a right-time' railway could help drive up overall satisfaction.

Recommendation 2: Punctuality

Passenger Focus recommends that DfT includes the following requirements in the specification for the new franchise:

- Challenging but achievable PPM targets for the franchise as a whole
- Punctuality should be disaggregated to the maximum extent possible to be meaningful to passengers. This should include (as a minimum) reporting on all identifiable routes and service groups – ultimately we see no reason why passengers ought not to be able to identify performance of individual trains
- Challenging but achievable targets for reductions in the number of trains reaching their destination more than 20 minutes late, but without resorting to extended journey times.
- Moves towards a 'right-time' railway – possibly involving the reduction of the current 10 minutes allowance and/or publication of right-time performance.
- A requirement to report performance of trains arriving at key intermediate stations: we would suggest Peterborough, Doncaster, York and Newcastle. For

[4] See Appendix C: Examining the link between customer satisfaction and East Coast Performance. December 2010

simplicity these could also function as stations against which ‘right-time’ performance is published.

3.4 Value for money

Value for money was the second highest priority for improvement in our 2009 East Coast research – it is also traditionally one of the lower areas of passenger satisfaction (only 57% of East Coast passengers were satisfied in the Autumn 2011 wave of research).

Passengers are paying an increasingly high proportion of the costs of the railway and this makes the delivery of value for money a significant challenge. Passenger Focus’s February 2009 Fares and Ticketing Study concluded that the long-distance fares structure must be simpler. Existing fares simplification was about presentation only: the underlying structure is still seen as complicated and illogical (e.g. two singles may or may not be cheaper than a Return, a Return £1 more than a Single). The price of flexibility is too high and passengers are baffled by the huge gap between the cheapest and the most expensive fares on the same train. The long-distance fares structure needs to be (and be seen to be) fairer to passengers and the study concluded that it needs fundamental reform to deal with myriad anomalies/complexities and tackle the high price of flexibility.

This latter point is also consistent with our research[5] among employers which shows that business passengers find the lack of flexibility within the ticketing structure a real problem – e.g. to allow for a meeting that overruns by 30 minutes. Prices for those passengers who can buy well in advance and stick to their plans can be fantastic value for money. However, the options for those travelling at short notice, or requiring even a small degree of flexibility, are in some cases extremely expensive and result in value-for-money scores plummeting.

Another important factor to assist in delivering value for money is to ensure that fares and ticketing processes are fair, impartial and clear, enabling passengers to purchase the cheapest appropriate ticket for their journey. Many passengers are confused by the complexity of the fares system. Clear information about the validity of tickets and any applicable restrictions must be readily available. Passengers should be able to buy the most appropriate ticket for their intended journey, regardless of the whether this is purchased at a ticket office, online, at a ticket vending machine (TVM) or through any other method.

The re-letting of the East Coast franchise gives the DfT an opportunity to address areas of passenger frustration with the current fares structure. We are conscious that Government is currently embarked on a review of fares and ticketing. Passenger Focus will be responding to this but, for the sake of completeness, we set out a number of our long-standing aspirations below.

Recommendation 3: Fares and ticketing

Passenger Focus recommends that DfT includes the following requirements in the

[5] http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=2526

specification for the new franchise:

- Fares regulation
  The level of flexibility that can be applied to increases in individual fares should be restricted to a maximum of +/- 2% (rather than +/-5% at present). This will allow the train operator to correct any anomalies between fares and address market issues where appropriate but will limit the ability to drive large differences between fares relating to specific routes/stations.

- A logical, transparent and fair pricing structure
  - Move to single-leg pricing (i.e. off-peak singles to be priced at 50% of the off-peak return). This mechanism is used already by First Great Western and Virgin Trains to give passengers the opportunity to mix their use of train-specific Advance tickets and more flexible options – for instance, travelling out on a specific train but needing flexibility about the return time. The existing East Coast operator offers a variant of this (i.e. an online deal only for journeys to/from London).
  - Flexibility at an affordable price is a key requirement of such a new structure. We believe that passengers holding Advance tickets who miss the train on which they have booked should be permitted to pay the difference (possibly plus an administration fee) between what they have paid already and the appropriate new ticket they are required to purchase. This will substantially address the genuine anger passengers feel when they miss their intended train and are asked to buy a completely new ticket with no account taken of the money already paid.
  - The 'cut-off' time for buying Advance Single tickets be moved to the latest practicable time to allow the production and positioning of seat reservation labels. The remaining as-yet-unsold Advance tickets should stay on sale, if practicably possible, until two hours before the train departs from its origin station.
  - Spreading the cost of an annual season ticket. A facility to pay for an annual season ticket in 12 instalments, without a charge for credit, should be developed and actively promoted. This will allow more passengers, and potential passengers, to benefit from the discounts offered by an annual ticket. It will also bring the railway in line with other public and private sector organisations.
  - Providing carnet-style tickets that enable passengers who cannot benefit from season ticket discounts to achieve some economies from repeat travel.

- Making buying a ticket easier
  Our research has identified a number of issues with both TVMs and websites and these problems are set out, with recommendations about how to improve retailing through these channels, in:
  - Ticket vending machine usability, Passenger Focus, June 2010
  - Ticket retailing: website usability, Passenger Focus, June 2011.

Passenger Focus recommends that the next East Coast franchise either incorporates these recommendations on ticket retailing within the specification or - at least - directs bidders to consider the conclusions within both reports. In particular:

- That on flows controlled by East Coast, applicable restrictions should be printed on passengers' tickets to remove confusion over validity
- That all East Coast ticket vending machines must clearly display outward and return ticket restrictions on the screen prior to a passenger committing to purchase
- That impartial retailing rules be formally extended to cover internet ticket sales through the new operator's website.
- That it be made impossible to buy an Advance ticket at a higher price than the 'walk up' fare available on the same train and that it be made impossible to buy out and back Standard Class Advance tickets at a higher price than the 'walk-up' return fare available on the same trains.

3.5 Service frequency and getting a seat

Being able to get a seat, journey speed and the frequency of trains were the third, fourth and sixth highest priorities for improvement in Passenger Focus's September 2009 research. However, changes introduced in the May 2011 timetable have significantly changed the assumptions on which this research was based – e.g.an extra train per hour to principal stations, intermediate calls taken out of other services to speed them up, and greater use of a standard pattern of services.

Notwithstanding this there are several issues/questions that remain from our original submission which are still relevant to the post May-11 timetable:

- Whether an optimum balance had been achieved between the needs of end-to-end passengers and those making long-distance, but non-London inter-regional journeys. The completion of the CP4 investment schemes provides an opportunity to look again at whether the Anglo-Scottish trains can be stopped at Peterborough in most off-peak hours, restoring journey time and quantum of opportunities that worsened in May 2011.
- The scope for a higher frequency of service on Saturdays.
- The potential for later-evening trains on weekdays from London Kings Cross – e.g. the gap in departures between 2200 and 2330 and the lack of a 0000(ish) departure for Peterborough, Grantham and Newark.
- The scope for earlier services on Sunday mornings. Although the May 2011 timetable improved things for the long-distance stations (except Edinburgh) the first arrival is still after 1000 rather than between 0900 and 1000 as on some other routes. For example, a 0800 departure from Edinburgh to give a 1253 'lunchtime' arrival at Kings Cross rather than 'nearly two o'clock'.
- The need for a later last train north of Newcastle. The last weekday train calling at Morpeth and Alnmouth is now 2140, Fridays it is 2242, Saturdays 2138 (Alnmouth only) and Sundays 2151. One solution is for the 1930 Kings Cross to Newcastle to be extended to Edinburgh all nights of the week instead of just Friday.

We are mindful that the Intercity Express Programme (IEP) offers the next major opportunity to enhance capacity. However, as this rolling stock will not appear until 2018 onwards it should not detract from efforts to improve capacity/reduce crowding in the meantime. We believe it important that the specification require the operator to monitor (and address) crowding over the life of the franchise. A key element of this is the provision of accurate loading data. We believe that there should be much greater public access to loading/crowding data.

Passenger Focus believes that the specification is the key to the entire franchising process. We note the Department's intention to provide greater flexibility for operators to respond to demographic and market changes and commercial opportunities. However, it is only against a sufficiently detailed specification that a TOC's performance can be effectively monitored - and, in the worst case, it would be the standards set out in the specification that would provide the framework for determining if a TOC should be removed for poor performance. For the Government to ensure it gets what it pays for with taxpayers' money there must be specification to set out what is required of the new operator. East Coast is also a highly complex franchise serving a wide geographical area with distinct market characteristics – for example, there is a big difference between weekend and weekday markets. A loose, one-size-fits-all approach to specification risks losing these nuances.

We are aware that franchise negotiations create an opportunity to redraw the franchise map. At the time of the previous consultation there was a suggestion that Great Northern 'outer' services could be transferred into the East Coast operations. Rather than speculate we will address any such proposals as part of our response to the public consultation.

Recommendation 4: Service level specification

Passenger Focus considers there is a need for the East Coast franchise to have a strong and sufficiently detailed specification to protect both Government and passenger interests. This should:

- Be based on the current level of service. Whilst acknowledging the need for some flexibility to adapt the train service to changing demands over the franchise term there must be sufficient detail in the specification to protect key journey opportunities. These must include journeys to/from school and work and maintenance of established and, of particular importance for East Coast, well-used connections. As a minimum Passenger Focus would expect the specification to give a broad outline of the core service to be provided: frequency, first and last trains, basic service patterns, and key journey times. The provision of sufficient capacity must also be addressed, not only at the time of bidding but over the life of the franchise.
- Allow intervention when required to ensure improvement and, as a final sanction, the removal of an operator who consistently fails to deliver the necessary levels of service.
- Ensure meaningful consultation. Where there is potential for any significant change to train service provision at any time during the franchise there must be a requirement for transparent, meaningful and robust consultation processes that allow all stakeholders views to be listened to and responded to, prior to changes being finalised or implemented.

- Commit to greater public transparency on load data and crowding levels.

3.6 Facilities and services on-board the train

Improving facilities and services on-board the train was the fifth highest priority for improvement among the 6000 ICEC passengers who took part in Passenger Focus's September 2009 research. Our work in 2009 highlighted three particular areas that could be addressed:

- **On board catering**

  Catering may not a high priority issue in its own right - most passengers use the train in order to get from A to B rather than to eat and drink. Nevertheless, our 2009 survey found that many passengers did use the onboard catering on East Coast trains (54% of the 5789 passengers answering the question in our quantitative research). The qualitative research suggested that business travellers making journeys that involve leaving home before breakfast or arriving back after supper time would be the most inconvenienced if on-board catering were scaled back. However, the research gave a sense that even non or light users of the current facilities still want it there for those 'emergency' occasions when they have missed breakfast, or as a bit of a treat on a leisure trip.

  The same research asked passengers about preferences:

% fairly or very important	Total	Commuter	Business	Leisure	First Class	Standard Class
Trolley (sample 5,652)	64%	57%	69%	64%	75%	62%
Buffet counter (sample 5,453)	57%	49%	61%	57%	57%	57%
Hot meal cooked to order brought to seat (sample 5,351)	22%	19%	22%	22%	46%	16%
À la carte restaurant (sample 5,291)	17%	15%	19%	16%	33%	13%

Source: Passenger Focus Quantitative research. September 2009.

This shows that for Standard Class ticket holders an at seat trolley and a buffet counter are almost equally important at 62% and 57% respectively. Having a hot meal cooked to order and brought to your seat was consistently more important than having an à la carte restaurant. The importance of the various catering options varies by geography: having a buffet car is important to 35% of passengers in Peterborough and the East Midlands category of our sample, but important to 65% in the Scotland category. Unsurprisingly, the longer the likely journey time, the greater the importance of catering. To have a 'hot meal cooked to order and brought to seat' is important to 16% of passengers in Peterborough and the East Midlands category, but 30% in the Scotland category. For an 'à la carte restaurant', 13% importance for Peterborough and the East Midlands, but 21% for Scotland.

Recommendation 5: Catering

We recognise that DfT franchise policy is moving away from specifying such items. However we have still included this in our submission as it is something we believe that bidders will need to consider when preparing their offers. We believe:

- that all* East Coast trains operate a buffet counter and at seat trolley service in Standard and First Class offering snacks and light refreshments.
  (*We recognise that on a very small number of East Coast trains it may not be cost-effective to provide a buffet and an at-seat trolley service.)
- that key business trains and other longer distance trains that run over meal times offer the facility to obtain a hot meal at your seat, whether passengers are travelling Standard or First Class.

- **Train presentation**

Our 2009 qualitative research revealed that passengers had a strong negative view of toilets on East Coast trains. Respondents referred to them as messy, smelly, unclean and poorly maintained (e.g. run out of soap and/or hand towels). NPS shows that, since then, there has been an improvement in satisfaction with toilets. Albeit still low in absolute terms (55% satisfaction) it is above the sector average (52%).

Likewise, satisfaction with the cleanliness of the train is above the sector average (85% and 82% respectively).

It is notable that Passenger Focus's research into value for money[6] found that for long-distance passengers train toilets being clean and in working order were significant factors in determining satisfaction with value for money. We can also see that cleanliness is a significant driver of overall satisfaction (second only to punctuality).

It will be important, therefore, that the new franchisee maintains and improves these scores.

Recommendation 6: Targets for train presentation within the franchise

Passenger Focus recommends that DfT includes targets for train cleaning, up-keep and repair of the train and for toilets on trains within the new franchise. These can either be as targets in their own right or as part of the suite of satisfaction measures set out in recommendation 1 above.

- **Wi-Fi provision**

Passenger Focus's September 2009 research revealed that passengers want Wi-Fi on East Coast Trains but routinely experienced difficulties with the download speed and connectivity of the current system. In the quantitative phase, 19% of the 5,869

[6] 1 Page 24 of the Continental Research report published as part of Passenger Focus's Fares and Ticketing Study in February 2009 . http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=2526

passengers answering the question had used the Wi-Fi on the journey they were making when they completed the questionnaire. 53% of commuters; 52% of business travellers; 33% of leisure travellers; and 48% of First Class ticket holders said having Wi-Fi was fairly or very important on today's journey.

One of the key advantages rail offers over other modes is in terms of the value of travel time. Being able to get some work done or simply catching up on emails / surfing the internet can be competitive advantages. Unfortunately these are lost if mobile communications (phone and Wi-Fi) are not reliable. A recent report from OFCOM on mobile 'not spots'[7] referred to coverage on the West Coast Main Line being significantly better than the East Coast Main Line. Our NPS survey also asks about satisfaction with mobile phone and internet reception: for the Autumn 2011 wave, satisfaction was at 65% and 50% respectively.

Recommendation 7: Mobile / Wi-Fi coverage

Passenger Focus recommends that DfT includes the following requirements in the new franchise:

- That there is a requirement on the new operator to monitor customer satisfaction with the reliability of the onboard Wi-Fi and develop action plans to address issues that emerge.
- That the specification requires the operator to work with mobile phone companies and Network Rail to explore the recommendations arising from the OFCOM report.

[7] Rail 'Not-spots' - Technical Solutions & Practical Issues
http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/not-spots/rail-not-spots.pdf

4. Additional Recommendations

There are also a number of important recommendations that arise out of our other, subject specific, research and which we believe need to be reflected within the franchise.

4.1 Dealing with disruption and provision of information

Effective management of disruption and keeping passengers informed must be a key requirement for the next franchise. Analysis of NPS above shows that managing delays is the main driver of dissatisfaction.

The table below sets out East Coast NPS scores for dealing with delays. Despite these being above the average for the Long Distance sector (50%) there is still room for improvement.

Train Factors % Satisfied. Autumn 2011	East Coast as a whole	London to East Midlands / East	London to Scotland/ North East	London to Yorkshire	Non-London Journeys
How well train company deals with delays	56	66	55	56	52

It must always be front of mind, however, that many of the stations managed by East Coast have substantial use by non-East Coast trains and passengers and that this will not be reflected in these figures.

Recommendation 8: Passenger information during disruption

When services are delayed or disrupted passengers want the information that allows them to make an informed choice about what they do. Passenger Focus recommends that DfT includes the following requirements in the specification for the new franchise:

- That compliance with the ATOC Approved Code of Practice Passenger Information During Disruption and with the Good Practice Guides on provision of passenger information become requirements in the new franchise, verification of which will need a compulsory programme of audit and mystery shopping.
- That a facility for passengers to receive SMS text alerts free of charge warning them if disruption will, or is likely to, affect their journey be a requirement in the new franchise – with an associated requirement to achieve a strong level of sign up.
- That active co-operation be required with proposals developed by the industry Passenger Information During Disruption (PIDD) Steering Group to feed station customer information systems directly from Darwin, the national real time train running database.
- That a strategy be developed and implemented to improve NPS scores for "how well train company dealt with delay" and "usefulness of information during a delay".

4.2 Keeping passengers on trains during engineering works

Passenger Focus has a long-standing aspiration that the industry keeps passengers on trains wherever possible during engineering works, rather than using buses.

Our research[8] on planned disruption in the Reading area over the Christmas 2010 period confirms that passengers' preference is to 'stay on the train' (i.e. by virtue of trains running over diversionary routes) rather than having to catch a rail replacement bus. However, it also showed that satisfaction with the bus replacement service can be positively influenced if the disruption is well planned and communicated in advance.

Recommendation 9: Reduce the impact of bus replacement services

Passenger Focus recommends that in the new franchise DfT requires the development and implementation of a strategy, jointly with Network Rail, that keeps passengers on trains during the maintenance, renewal and upgrade of the railway, and uses buses only as a last resort. There must be a safeguard against an operator opting to receive a compensation payment from Network Rail and running replacement buses instead.

4.3 Meeting the needs of disabled passengers

The new franchise must incorporate requirements to ensure that the needs of all potential passengers are recognised and addressed. The specific needs of passengers who are disabled or who have other access needs must be considered and appropriate adjustments made to ensure stations and trains can be utilised safely at all stages of the journey, with necessary assistance provided when required.

Recommendation 10: Accessibility

Passenger Focus believes the franchise specification should require the following provisions:

- Scooter policy. The existing franchise already operates a policy accepting unfolded scooters of 'reference' wheelchair dimensions. We would expect the new operator to maintain, or improve, this policy.
- Provide a priority seat card scheme (as initiated by Southern and now adopted as good practice by a number of operators) to help passengers demonstrate a specific need for a seat, backed up by publicity on stations and greater prominence made of which seats are priority seats so that they are easily located and recognise.
- Clarify the priority of use of priority seating and the groups considered eligible for it.
- Provide assistance cards which disabled passengers can show to staff to explain their disability – hearing-impaired, speech-impaired, learning difficulties, so that staff can react and provide the necessary additional assistance.
- Comprehensive Passenger Assist monitoring – e.g. the number of assistance requests delivered. This could be included in the Passenger's Charter and the DPPP.
- Best use should be made of the management information gained from Passenger Assist – e.g. enabling TOCs to plan assistance provision better.
- Training of staff – especially front-line staff in immediate customer contact, whether face- to face or by telephone.

[8] http://www.passengerfocus.org.uk/news-and-publications/document-search/document.asp?dsid=5162

4.4 Stations

- **Investment and management**

  There has been significant station investment in East Coast stations. The 'new' Kings Cross is perhaps the most notable but Peterborough is in the midst of substantial rebuilding and there are schemes at Wakefield Westgate and Newcastle that are starting or at an advanced stage of planning.

  In general terms we would like bidders to demonstrate how their future investment and station management plans will deliver:

  - More seats for passengers waiting for trains.
  - Cleaner and better-maintained station toilet facilities.
  - Station staff that are more visible to passengers.
  - Station staff with better knowledge during times of disruption.

  In addition we would expect station presentation to feature in the suite of satisfaction measures referred to in recommendation 1.

- **Car parking**

  Passenger Focus's September 2009 research asked passengers to indicate their priorities for improving station facilities, with four areas from which to choose. Priorities were having more parking spaces (39%); making it easier to pay (8%); and improving cleaning and maintenance of the car park (2%). Significantly, 52% did not regard any of these as their top priority for improving car parking: we suspect this is because we did not offer a "reduce the cost of parking" option.

  The daily car parking prices at East Coast stations are high (e.g. Peterborough £12.50, York £13.50, Darlington £10.50 and Newcastle £14.50). In some cases the car parking fee is nearly the same as some off- peak rail fares from the station concerned (e.g. Peterborough to Cambridge, £15.90). Passengers look at the total cost of travel rather than distinguishing between the component costs. We maintain that all day and annual car parking prices ought to be subject to the same cap as regulated fares.

  Prior to the current recession, demand for car parking at a number of stations managed by the East Coast franchise was outstripping supply, despite the very high prices being charged by GNER and later NXEC. Outside the large urban areas, the car will play a key role in passengers accessing East Coast services and as demand for travel increases (as all the forecasts suggest), it is likely that station car parks will quickly be at capacity once again. It should also be noted that at many East Coast stations there are too few bicycle parking spaces.

  Recommendation 11: Station travel plans

  Passenger Focus recommends that DfT requires bidders to develop, alongside their assumptions about volume growth during the franchise term, a station travel plan for how passengers will get to and from each station, including implications for car parking. This will need to include an assessment of the cost of car parking. The key elements of each travel plan should become committed obligations in the franchise.

4.5 Ticketless travel

An effective strategy for revenue protection is important for the new franchise. Passenger Focus believes ticketless travel is an important issue - and one that needs addressing. Passengers who avoid paying for their ticket are in effect being subsidised by the vast majority of fare-paying passengers. It is right that the franchisee will take steps to deter, to catch and to punish those who deliberately set out to avoid payment.

However, the revenue protection strategy must provide safeguards for those who make an innocent mistake and whose intention was never to defraud the system. We currently receive more complaints of this nature about East Coast than any other operator. Overall in 2011, 23% of the appeal complaints we received, from all train companies, were about unpaid fares notices, penalty fares notices or prosecution notices.

While the overall issue is something that needs to be addressed as part of a wider industry initiative a new franchise does provide an opportunity to take a fresh look at how the system operates.

Recommendation 12: Revised procedures for dealing with ticketless travel

Bidders should be mindful of passenger intent in developing and applying a revenue protection strategy. This requires:

- Clear consistent guidelines explaining when staff should show discretion in the enforcement of penalties. For example when:
  - passengers do not have their railcard with them
  - the required tickets are not available from a ticket machine
  - they are told by a member of staff that they can board a train without a valid ticket
  - ticket restrictions are not clear or available at the point of purchase.

  We note that the current operator has introduced a 'discretion' policy for ticketless travel that addresses some of passengers' concerns. This is welcome and is something we feel should be expanded and continued within the new franchise. This should not just apply to cases referred by Passenger Focus on appeal.
- Commitment not to go straight to any form of criminal prosecution unless they suspect (or have proof) that there was intent to defraud.
- Penalties that are proportionate to the actual loss suffered by the operator.
- Greater transparency surrounding the number of Unpaid Fare Notices being issued and the numbers being overturned on appeal.

4.6 Complaints Handling

On a wider complaints handling front we also believe that bidders need to look at the volume of appeal[9] cases that reaches Passenger Focus. In the period January-December 2011 just under one-quarter of all of our appeal complaints were from East Coast passengers.

Recommendation 13: Complaints handling

We recommend that bidders be required to identify how they might reduce the number of appeal cases being escalated to Passenger Focus, in particular those that centre on the speed or quality of the original TOC response.

This needs to include:

- **Addressing all the issues in a complaint**
  A fifth of the comments we received about the train company complaints handling are about the operator not addressing all of the issues raised in the complaint. Doing so demonstrates that passenger concerns have been acknowledged and understood and may have a positive impact upon the number of passenger 'comebacks'.

- **Continuous improvement**
  It is important for any complaints process to have a continuous improvement process for passenger complaints and comments. Passenger Focus is keen to see operators using passenger feedback to improve the business and the way it operates.

- **Empowering Customer Service Advisors**
  Operators could empower their advisers to use more discretion when dealing with compensation claims. By basing responses on the merits of the case rather than simply applying the 'rules' (the National Rail Conditions of Carriage) many passenger complaints would not reach the appeal stage.

  For example, in 2011, nearly 40% of the comments we received about the TOCs complaints handling were about the level of compensation or goodwill offered. In that same year we achieved £78,536.34 in compensation for passengers through our intervention – of which £29,761.66 was from East Coast. This was mainly from 'gestures of good will' rather than being something arising from an obligation in their passengers charter or from the conditions of carriage. Resolving some of these at the beginning of the complaint rather than on appeal would have improved passengers perception of customer service.

- **Compensation arrangements**
  Our research (Train Operator Compensation Schemes – July 2011) found that passengers dislike receiving compensation in the form of paper rail travel vouchers that can be redeemed against future journeys. Passengers prefer cash or payment direct to their bank account. If, however, vouchers are to be used it is important that they can be redeemed on-line.

[9] An' appeal' is a complaint which the passenger has raised with the train operator but remains unhappy with their response. The passenger has asked Passenger Focus to make representation on their behalf to seek a resolution to their complaint.

Appendices

Appendix A
2009 Continental Research qualitative report

Appendix B
2009 Passengers' priorities for improvement

Appendix C
Passengers' satisfaction and performance

Appendix A

Passenger Focus

National Express East Coast On

Board Service Requirements

Market Research Report

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National Express East Coast On Board Service Requirements

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1. Background and Objectives

Passenger Focus is the independent national passenger watchdog. Its vision is to ensure that the rail industry and government are always putting passengers first, achieved by getting the best deal for rail passengers.

It is expected, following an announcement by National Express Group on 1 July 2009, that operation of the Intercity East Coast franchise will transfer from National Express to central government towards the end of 2009. A division of the Department for Transport, Directly Operated Railways, will be responsible for operating Intercity East Coast services until mid 2011. Passenger Focus and Directly Operated Railways are keen to understand passengers' views about a range of on board service issues and are collaborating on this project.

As part of this exercise, research was required to provide an understanding of passengers' experiences and opinions of National Express East Coast.

Specifically this included:

- identifying improvements that are required to the current National Express East Coast catering provision
- identifying improvements that are required to the on board wi-fi internet facility provided by National Express East Coast
- identifying how passenger satisfaction with the attitude and helpfulness of on board staff can be improved from its current position
- identifying improvements to other elements of passengers' on train and in station experience

2. Research Methodology

A combination of group discussions and individual face-to-face depth interviews were conducted in order to meet the research objectives.

Group discussions were selected for researching the majority of passengers as they provide a lively forum for debate and discussion, and thus are ideal for generating the key issues and themes. In addition, groups allow us to quickly identify any similarities or differences that may exist between different respondent types. The group dynamic also encourages respondents to share their experiences, challenge each other, build on each others' ideas and debate and discuss their views on rail travel, all of which helps us to build an in-depth understanding and a rich picture of attitudes and opinions.

For logistical reasons face-to-face depth interviews were conducted with disabled passengers. The sample of these respondents was diverse in terms of the nature of their impairment, their travel behaviour and their location, and therefore lacked the cohesiveness required for a group discussion. Furthermore, depth interviews allow us to meet the respondents at a time and place that is suitable for their particular needs, if necessary.

3. Sample Structure

Group Discussions

Location	Group Profile	
London Monday 21st September	***Group 1*** Commuters travelling from Newark North Gate, Grantham or Peterborough to London Kings Cross Season ticket holders BC1C2 Aged 25-45 years	***Group 2*** Business passengers travelling from London Kings Cross to at least as far north as Doncaster First Class ticket holders Travel at least twice each month BC1C2 Aged 35-55 years
Leeds Tuesday 22nd September	***Group 3*** Business passengers travelling from Leeds to London Kings Cross Travel at least twice each month Standard Class ticket holders BC1C2 25 – 45 years	***Group 4*** Leisure passengers travelling from Leeds to London Kings Cross Travel at least once in the last 3 months Standard Class ticket Holders BC1C2 21 - 35 years
Edinburgh Monday 21st September	***Group 5*** Leisure passengers travelling from Edinburgh to at least as far as York and including passengers travelling to London Kings Cross Travel at least once in the last 3 months Standard Class ticket holders BC1C2 Aged 50+ years	
Newcastle Tuesday 22nd September	***Group 6*** Business passengers travelling from Newcastle to London Kings Cross Travel at least twice each month First Class ticket holders BC1C2 Aged 35-55 years	

Each group discussion lasted for 2 hours and comprised 6-8 respondents. The groups in London and Leeds were held in a viewing facility so that members of the project team could observe them. All respondents were incentivised for their participation.

Face-to-Face Depth Interviews

Category	Number of Depth Interviews
Visually impaired	2
Mobility impaired	2
Hearing impaired	2
Learning impaired	2
Total	**8**

Each depth interview lasted for one hour and was held at a time and location convenient to respondents. As with the group discussions, respondents were incentivised for their time.

The depth interviews encompassed commuters, business and leisure passengers across all four locations.

The following criteria were also imposed on the sample overall:

- all respondents were users of National Express East Coast
- all groups contained a mix of male and female passengers
- at least three respondents per group had been making that journey for at least two years
- all commuters were season ticket holders (mix of monthly and annual)
- All had experienced either on board wi-fi or catering services within the past six months
- At least four First Class passengers in the relevant groups had used At Seat Dining

4. Catering

4.1. Overview of the on board catering offer

Prior to assessing reactions to catering, the journey purpose should first be considered.

Across the sample, rail travel was seen as a quick and generally stress free mode of transport that gives the passenger direct access to city centres. However, specific motivations for using the train varied depending on the purpose of the journey:

- business travellers prefer to use the train for business journeys as it provides them with the opportunity to work on the journey – it is possible to read, use a laptop and make phone calls in a way that would not be possible if driving or flying

- leisure travellers view the train as a quick and comfortable mode of travel that provides them with the opportunity to read, walk around, use a computer, listen to music or even watch DVDs

- For commuters, rail is the quickest mode of transport and the one that offers the most consistent and predictable journey time (compared to driving, for example). For the commuters in this sample, who were travelling from Newark North Gate, Grantham and Peterborough into London Kings Cross, the ability to travel by train was a key factor in enabling them to live outside of London while still working in the City.

The role and usage of catering, therefore, differs somewhat depending upon the type of journey.

Business travellers tend to be fairly heavy users of catering, as they are making relatively long journeys (at least two hours). They claim they nearly always have a tea or coffee and a snack (such as a biscuit, sandwich or packet of crisps etc) on their journey, and may have hot food or a hot sandwich if travelling over a meal time. In addition, they may also buy alcoholic beverages on occasion to relax on their homebound trip (if they are not going back to the office).

For leisure travellers, catering can form part of the overall leisure experience. Some older passengers who may be travelling with their families enjoy hot drinks, sweets and snacks as a treat on the journey. Younger leisure passengers appeared more price sensitive and tended to keep catering purchases to a minimum (hot drinks and snacks), with some claiming that they occasionally didn't purchase any items while on the train.

Commuters typically had the shortest journeys of all respondents within the sample, therefore their need to use the on board catering options was naturally more limited. They would, however, sometimes purchase hot drinks in the morning and occasionally 'emergency' purchases – for example a pastry in the morning if they had missed breakfast, or a sandwich on the way home if they were particularly hungry.

There is a combination of factors that influence the passengers' decision to purchase catering items once on board.

Time of day is a key factor - if the journey overlaps a mealtime then the passenger is more likely to purchase food and drink on the train. This, however, generally applies to lunch and dinner –passengers appeared less likely to eat breakfast, as they tended to eat before commencing their journey, unless they were making a very early start (e.g. 06.40 from Leeds to London). This is closely linked to convenience, and this is particularly the case for business travellers, who can save time at their destination by eating on the train. This is less of a trigger for commuters or leisure travellers, who appear more likely to eat once they arrive at their destination, or prior to leaving. Lack of planning is another key driver for using on board catering services. Most respondents claim they prefer to purchase their food in the station prior to boarding the train, as this gives them greater control over the range and quality of the products available to them (particularly for coffees), however in some instances if the passenger is rushing they do not have time to do so, therefore purchase once on board.

"I think people might find it safer to take things with them rather than wait and see if they might get it on the train, because if you don't, you're stuffed"
(Leisure, Edinburgh)

"There's that much choice in the station itself you've always got something to choose before you get on" (Leisure, Leeds)

Finally, boredom and simply seeing other people eat and drink can also trigger passengers to make a purchase.

Overall, passengers were quite satisfied with the on board catering offer, and no major problems were identified during the research. There were, however, some generic issues that spontaneously arose across the sample, regardless of the type of passenger. These included:

- items being out of stock (respondents in Edinburgh particularly expressed this view)
- the trolley service is not always available (commuters were particularly aware of this)
- a general lack of healthy, fresh, low fat or vegetarian items such as fruit, salads and soups
- the quality of some items (coffee and sandwiches in particular) was thought to be mediocre
- products were considered expensive compared with the High Street.

"It's expensive, you know, and the food's not great"
(Commuters)

"There do seem to me to be fairly frequent announcements when the train leaves Kings Cross that the trolley service is not in operation"
(Commuters)

"It's unhealthy, there's no choice for vegetarians – it's an egg sandwich or a bag of crisps"

(Standard Business, Leeds)

Having said this, passengers were prepared to acknowledge that there are certain, obvious limitations to providing catering on board a train, namely a lack of space for storage and food preparation, and took this into account when commenting on the on board catering services.

This was also evident when discussing on board catering options in a 'competitive' context (e.g. compared to motorway service stations, railway stations and airports). Motorway service stations, while still holding some negative associations, are thought to have improved greatly in recent years, offering more healthy options and branded products such as Marks and Spencer. Airports are thought to offer a vast range of catering options and in flight catering is thought to be of a good standard, and major urban rail stations themselves offer a good range of catering options to take on board, providing stiff competition for the train – however, as described above passengers do acknowledge the natural limitations of on board catering.

There are also some parameters around expectations of quality of on board catering. Some passengers perceive that there is a natural 'ceiling' on the quality of food that it is possible to offer on a train. This is driven by the perception that ingredients can never be completely fresh (as they may have been on the train for some time) and as mentioned above the lack of storage and limited cooking facilities. In addition, some simply don't need or want a 'gourmet' experience on a train, viewing it as a mode of transport, and not a fine dining venue, and for this reason these passengers can be slightly cynical towards some of the more upmarket options offered, particularly as they already perceive the prices for standard items to be high.

4.2. Communicating on board catering options

Respondents were spontaneously aware of several means by which the on board catering service is communicated to them.

The most top of mind is the announcements that are made at the start of and throughout the journey. It should be remembered, however, that the majority of passengers in our sample were frequent travellers on the routes in question, and thus appeared inclined to 'tune out' such announcements, indeed some commuters claimed they were irritating and made too frequently. For visually or learning impaired passengers, however, these announcements are important as they cannot easily read written information.

Menus in the restaurant and at the buffet are of course an important source of information, and some passengers also mentioned that information is provided in the on board magazine. These are important for those passengers with hearing impairments, who cannot hear announcements.

Some respondents also mentioned seeing signage on the train e.g. posters in the buffet relating to special offers, as well as posters in the station and notices on the internet when booking their tickets.

Ideally, a combination of audio and visual communications would be provided. Generally, however, awareness of the scope and range of on board catering was fairly low. This was evident from respondents' pleasant surprise at the range of items available on all the menus (particularly the buffet) and the variety of dining options available, indicating there is potential for more effective communications regarding the range and choice available.

4.3. The trolley and buffet

Nearly all the respondents in the sample were users of the trolley service. It was thought to be highly convenient, removed the need for queuing and means the passenger does not need to leave their seat and valuables. This is particularly important for mobility-impaired passengers who have difficulty walking in a moving train or problems reading the menus in the buffet or restaurant.

"The trolley's good because if you're travelling with laptops and all the electrical stuff that we do, you don't have to leave your seat. I think that's convenient" (Commuters)

There were no major criticisms of the trolley service, although some felt that it offered a limited range of products and sometimes did not have change available.

The buffet was also a popular option. Many claim it provides an 'excuse' to get up and stretch their legs, or take a break from work. It naturally provides a greater range of products than the trolley, including cold drinks and hot food. Some, however, had concerns about leaving their seats and valuables, particularly if the buffet carriage was a long way away. Respondents also described that it can be a hassle to carry hot drinks and food on a moving train while negotiating other passengers and the trolley service in the narrow train aisles.

"I would use the buffet for coffee, I think it's better. If I really want a coffee, I'll get off my backside and go and get one"
(Leisure, Leeds)

Upon reviewing the buffet menu, most were pleasantly surprised at the range of goods available, and claimed they had been unaware that the offering was so extensive.

"I didn't know the buffet menu was that extensive…I thought it was just crisps and things"
(Leisure, Leeds)

Some other general points were raised upon looking at the menu:

- the crisps were perceived as extremely expensive at 95p, which was thought to be a huge discrepancy with High Street prices
- Some respondents questioned whether the Hot Eats would be microwaved or freshly cooked. There is a general expectation that they are microwaved, as they don't envisage a chef would be on board the train to cook such dishes.
- the option to have sandwiches made in front of them would be appealing to some passengers – this would offer greater variety (as the passenger could choose a wider combination of ingredients) and indicate freshness
- generally, the menu would be improved by offering a greater range of fresh and healthy items such as soups, jacket potatoes, salads, fruit and a greater range of sandwiches.

In short, there was no clear 'winner' between the trolley and buffet services, with some preferring the convenience of the trolley and others preferring the wider range of the buffet.

4.4. At seat dining and cooked to order hot meals

Standard Class respondents were mostly unaware of an 'at seat' option (although one or two had seen others using this service) and tended to associate it with First Class travel.

Although some respondents who were First Class business travellers had in fact used At Seat Dining, they shared the widely held view of other respondents that there were several barriers to using At Seat Dining.

The key barrier is a general sense of discomfort and embarrassment about eating in the same environment where others are working or relaxing. Hot food in a closely confined setting such as this is potentially messy, smelly and distracting, and many consider it impolite to eat in front of others in such a situation, and conversely would be annoyed if others were to do the same in their presence.

"The food would be all over the place. Your sausages would fly into someone's face!"
(Standard Business, Leeds)

In addition, some claimed they would feel uncomfortable eating when travelling alone, and would be more likely to consider At Seat Dining if they were travelling with a party of friends or colleagues, although in such situations they would then probably be more likely to visit the restaurant, which is a dedicated venue for eating and would be less likely to disturb others.

"I just find it really uncomfortable. I wouldn't go downstairs at a hotel and eat on my own and it's even worse on a train. People can watch you and someone next to you is working on a laptop and you're sitting there slurping your food…"
(First Class Business, Newcastle)

"I just don't think it's the right environment for a relaxing meal"
(Leisure, Leeds)

Lack of space is also a factor. Business respondents in particular find it hard to envisage managing a plate, cutlery and drink alongside their laptop and paperwork at their seat, particularly if they are sitting in an 'airline' style seat where space is considered extremely limited.

Finally, there were concerns around the speed of service, both in terms of food delivery, as passengers are unsure that the train is adequately staffed to cope with high levels of demand, meaning they would have to order early in the journey to ensure service (which may not be convenient) and also in the removal of dirty dishes – they would expect the empty plates to be cleared immediately, and indeed some who had used the service had found service in this respect to be slow.

Views were mixed on looking at the At Seat Dining Menus. The 'Light Bites' menu was particularly criticised for its similarity to the buffet menu. For example, an item listed on the buffet as 'Lamb Hot Pot' was shown on the Light Bites menu as 'Lamb Hot Pot with Italian Mixed Salad Leaves' at a more expensive price, leading to cynicism, as it is generally interpreted to be the same dish at inflated prices. This is disappointing to First Class passengers, who believe there should be a complete departure from the buffet menu to accentuate the difference between the First and Standard Class options.

The Dining Menu was thought to offer a good range of dishes, catering for most tastes, although the vegetarian options were again thought to be limited. Standard Class passengers perceived the prices of this menu to be extremely high, particularly when they consider the negative issues around eating at their seat, as described above.

4.5. The A La Carte restaurant

Many passengers, particularly those in Standard Class, were unaware of the A La Carte offer. The majority of Standard Class passengers perceive the restaurant is only for First Class passengers, and thus have never investigated the offer, although one or two claimed they had heard announcements inviting Standard Class passengers to the restaurant (albeit rarely).

"I've heard of it, but I always just assume they're going to sting me for an upgrade [to First Class]"
(Commuters)

The A La Carte restaurant would be most passengers' preferred option if they did want to eat a hot meal on the train (excluding hot snacks), as it is considered a more appropriate place to eat than at the seat, and for leisure passengers could become part of the treat and leisure experience.

Passengers travelling between Edinburgh and London were more open to the concept of the A La Carte restaurant, as their journeys are longer and they are more likely to require a hot meal during their trip.

However, some issues did emerge regarding the target audience. Business travellers think the restaurant would be most appropriate for leisure travellers who have time to spare and want a relaxing experience. Leisure travellers, on the other hand, perceive the restaurant to be most used by business travellers who are trying to fit a meal into their busy day and can claim it back on expenses. The restaurant was not generally of interest to commuters as their journey is too short to accommodate a sit down meal, and in addition they tend to eat with their families when they arrive home in the evening.

"When I get off at Peterborough I can see people tucking into their dinners and it does look great. But I've no idea how much it costs, and I've got no confidence that the food would be ready in time before I arrived in Peterborough"
(Commuters)

On reading the dinner menu for the restaurant, respondents once again expressed a pleasant surprise at the 'upmarket' feel of the options on offer. The nature of the dishes implies they will be cooked fresh to order, as they are not generally 'microwaveable' types of food. The menu was also thought to offer a good variety of traditional foods, which would cater for most tastes. The wine rating scale was also appreciated.

The major barrier to the dinner menu was the prices, at which most of the respondents (particularly in Standard Class) were shocked. The prices were thought comparable with a decent restaurant; but passengers do not imagine that the quality of food or ambience of a restaurant could be replicated on a train – they therefore claimed that they would rather have a snack if they were hungry on the train, and then pay those prices to actually visit a proper restaurant upon arriving at their destination.

"You could get to where you're going and go to a fantastic restaurant for those sort of prices. If your husband said 'I'll treat you to a meal on the train' you'd think, 'cheers love, thanks a lot!' and you just wouldn't"
(Leisure, Leeds)

"I'm not sure I'm looking for gourmet on a train. I'm looking for good food. If I'm looking for gourmet I'd be getting dressed up and go out somewhere nice" (First Class Business, Newcastle)

Other criticisms focused on the lack of 'light options' (the menu is offering fairly 'heavy' main meals) and the lack of side orders of vegetables.

The breakfast menu was generally negatively received. Although respondents appreciated the range of teas on offer and the presence of fruit on the menu, they expressed disappointment at the range of cereals, the lack of light options (e.g. toast and jam only) and the lack of a ‘mix and match’ approach to the hot items, where comparisons with hotel breakfasts were made (e.g. it does not appear possible to select just sausage and eggs, or bacon and toast). Once again, the prices were considered excessive, particularly when compared with some hotel breakfast prices.

4.6. First Class complimentary offers

The complimentary items were identified as tea and coffee, fruit, biscuits and cakes. Most of the First Class passengers rated the complimentary items as ‘average to poor’ and tended to rationalise this against the price of the ticket, as well as making comparisons with Business or First Class air travel. Comparisons were also drawn here with Virgin Trains who are thought to offer a better selection of complimentary items.

Passengers felt the National Express East Coast offer could be improved by offering complimentary continental breakfasts or a glass of wine.

Some First Class passengers were open to the idea of a meal being included in the ticket price – as long as prices did not rise drastically, and felt this would be comparable with the service offered by airlines. Others, however, rejected the idea as they felt they would be potentially paying for a service they wouldn’t use.

4.7. Branded catering

Brands generally reinforce perceptions of quality and freshness, which would encourage purchase behaviour and reflect positively on the train company. On the whole, the idea appeared to be more popular amongst business travellers and commuters than leisure passengers, who typically have more time to purchase branded goods in the station.

Overall, branded ideas worked best for sandwiches and coffees, as these were the most often purchased items and those generally considered poorest quality.

Any brands provided on the train must be offered at High Street prices to encourage purchase, otherwise there is no incentive to buy and passengers will be likely to continue buying at the station prior to their journey.

Reactions to specific product categories are explored in more detail below.

Sandwiches

Some respondents had spontaneously mentioned that it would be nice to be able to buy branded sandwiches such as Marks and Spencer on the train, thus when the idea of having brands such as M&S and Waitrose available on board was presented to respondents it was positively received. Most respondents would consider branded sandwiches an improvement on the current offering in terms of quality, although a minority felt that the difference in quality would be negligible. Brands such as Prêt a Manger and Eat would also be considered appropriate.

"I'd be more inclined to buy branded sandwiches – you'd trust them more"
(Leisure, Leeds)

Coffees

Kenco is currently offered, but respondents were presented with the idea of products by High Street chains such as Starbucks, Costa Coffee and Café Nero being available on board. Again, this was a popular idea overall – coffee from these retailers appears to be one of the most widely purchased items to take on the train prior to boarding, therefore it would be exciting to some to be able to purchase such items once on board, as well as saving time in the station. However, some did express concerns around the quality of speciality coffees that might be offered on board, as they could not envisage that the correct facilities would be available to make them properly – such as espresso machines.

"I'd be an absolute sucker for the coffee, I'd probably have two or three!"
(Leisure, Leeds)

"If I knew that I bought my Starbucks in the morning in a shop and it cost one thing, and it was costing more on the train, I'd get annoyed and I wouldn't buy it"
(Commuters)

Cakes and pastries

The idea of artisan style bakery products on board was presented to respondents, and positively received. Some dislike the pre-packed approach that is currently offered (e.g. Fabulous Bakin' Boys) as the cakes do not feel fresh. Attractively displayed non-packaged cakes, on the other hand, could be tempting to passengers who claim they may be more likely to purchase a fresh cake or pastry if this option was available. Brands such as Paul or M&S would be considered appropriate here.

"The cakes you get at the moment are packaged and they were probably baked months ago. I'd be more likely to buy something that looks freshly made"
(Standard Business, Leeds)

Alcoholic beverages

Interest levels in higher end brands such as Old Speckled Hen being provided were lower. This appeared to be because on board alcohol consumption appears limited, so there is little need for a wide range of products to be available.

"I think the average person who just wants a drink coming home from London after work will drink anything that's cold…I don't think you'd necessarily feel you need to go for the top end of the range"
(Standard Business, Leeds)

4.8. Celebrity chefs

There was a neutral to negative response to the idea of a celebrity chef partnership. Generally, respondents were cynical in their views towards celebrity chefs, believing the concept to be a bit gimmicky and overdone and that celebrity chefs have become over-exposed. In addition, they claimed they were not naïve enough to believe that celebrity chef branded goods would be any better quality than other brands. Some cynically believed that if National Express East Coast was to partner with a celebrity chef it would be driven by a desire to generate publicity for the railway rather than a desire to improve the on board catering offer for passengers.

"If it was Jamie Oliver burgers and all that sort of thing, you'd just think 'yeah, right'. But if you found out as an afterthought he was behind the scenes, then you'd think National Express aren't trying to sell on the back of it"
(Commuters)

"Everyone knows the celebrity chef wouldn't have actually made the sandwich! We're not going to fall for that, it's just a gimmick"
(Standard Business, Leeds)

However, if a celebrity chef relationship was to occur, passengers would be most receptive to the chef 'revamping' the catering offer (as Heston Blumenthal did for Little Chef). This is because it would be viewed as a more consultative approach, which would potentially have greater benefits to the consumer than a generic branding of the on board products. This type of approach may also lead to a greater range of foods being available and a more imaginative use of ingredients, such as organic or locally sourced produce.

"I think I'd expect more flavours. It's not just going to be a cheese and ham sandwich, it will have something else in it to give it a bit of a kick"
(First Class Business, London)

However, any celebrity chef tie-ups should be handled with extreme care to avoid appearing gimmicky or a mere publicity stunt.

4.9. Catering staff

The on board catering staff generally received positive feedback, and were generally described as personable, presentable and genuine, with a positive approach to what is mostly perceived to be a fairly uninteresting job. Because of this, most respondents were open to staff taking a more proactive approach – for example, offering further drinks or informing customers of special offers – as long as the right balance of courtesy and unobtrusiveness is struck.

There were some comments that the staff in the buffet can be slow to provide service when the customer arrives (e.g. they may finish their personal conversation before serving the customer), and that the train can be understaffed at peak times.

First Class passengers had higher expectations of service and claimed that the staff can be scruffy, provide poor customer service and appear to lack pride in their jobs. This is often driven by comparisons with business or First Class air travel, where staff are considered highly attentive and more glamorous.

5. Wi-Fi

Passengers were extremely positive regarding the provision of free on board wi-fi by National Express East Coast. It is perceived as a real benefit as it enables business passengers to work while on the train, and commuters are particularly appreciative as it gives them the opportunity to live outside of London and not lose valuable working time. Leisure passengers also welcome the service as they can use it to catch up with emails, Facebook and general surfing.

"It would make it very difficult to live so far away from London if you couldn't use it"
(Commuters)

"What's the benefit? An extra two hours in the office!"
(Commuters)

However, there are thought to be major issues with connectivity and speed of service. The connections can be sporadic, and frequently cut out, and download speeds are slow. For these reasons, users do not attempt to use the service for anything other than emailing or surfing the web, and claim they would never attempt to download large files or connect to a VPN – in any case, many business users and commuters have BlackBerrys and company dongles which enable them to undertake such activities, or read their emails if the on board wi-fi is unavailable.

"It's not the best, it just falls over. Full marks for attempting it, though"
(Standard Business, Leeds)

"I think it's wicked, it is slow but at the same time I just really enjoy the fact that it's there, I'm just well happy it's there"
(Leisure, Leeds)

Some of the passengers in the sample were unaware that wi-fi is offered on board, or that is a free service, thus there is some scope for clearer communications in this area.

6. Train Guards

Passengers claim the attitude and demeanour of the Train Guards can vary significantly.

The majority of the Guards are considered to be personable, knowledgeable, efficient and proactive, however there are thought to be a minority who are rude, abrupt and unfriendly. While passengers do not excuse this they believe that the job lacks glamour and interest and therefore some of the on board staff may lack motivation, which may explain their bad attitude.

"Generally they're good. There's some characters who make it quite fun"
(Commuters)

"When they come along and check your ticket, personally I have found them extremely nice"
(First Class Business, London)

"I think generally they're really helpful. I've had a couple that've been a bit off, but actually, their job is probably quite crap, so mainly they seem to be quite good"
(Leisure, Leeds)

Overall, greater consistency in the approach of Train Guards would be likely to have a positive impact upon service perceptions, as currently the experience of interacting with on board staff appears to be linked to the individual's attitude and approach, rather than a service standard of National Express East Coast.

7. Improving Station Standards

Car parking

There was minimal use of station car parking, with commuters being the exception. However, it should be noted that the majority of the sample were beginning their journeys in large urban stations with significant public transport access, removing the need to drive and park.

Station car parking is generally considered to be prohibitively expensive, and it can be difficult to find a space. Some claimed that if they did have to drive and park at the station, they would be inclined to use other parking options (such as a nearby NCP) to avoid paying the station parking charges.

"My wife pleads with me to use the car [instead of my motorbike], but I just won't pay that money – the parking costs a fortune"

(Commuter)

Station staffing

Staff in the stations were mostly considered to be helpful and to have a good knowledge of the services leaving from and arriving to that station. Some impaired passengers claimed that staff could be more proactive in offering assistance to disabled travellers and that they may benefit from disability awareness training.

Waiting facilities

There were no particular issues with waiting facilities, again bearing in mind that the research was focused on major stations such as Leeds, Kings Cross, Edinburgh and Newcastle. These are considered to be modern, well maintained and developed with a wide array of shops.

Kings Cross was singled out for having a lack of seating or waiting space, although passengers accept that the station is currently undergoing development which has somewhat compromised space.

Ticket barriers and manual ticket checks at Kings Cross

Some respondents felt that automatic barriers had sped up the process of entering and exiting the station, whereas others believed it has slowed the process, as too many people try to get through at once.

"I like the barriers, the queues were just ridiculous before and now it seems a lot easier"

(Leisure, Leeds)

Disabled passengers were more likely to have issues with ticket barriers. Those with mobility impairments can find it hard to pass through the barriers quickly, before they close, and those with visual impairments find it hard to see where to insert their tickets, leading to stress. There was some comment from disabled passengers that the wider access gate on the barriers was often not manned, thus leaving them to struggle without assistance.

The manual ticket checks at Kings Cross were largely considered pointless, because respondents claim the tickets are always checked on the train, therefore they cannot see the benefit of manual checks, which can add time to the overall journey.

Toilets

Most respondents claimed they rarely used the station toilets, and amongst those who rarely or never use them, expectations of standards were poor.

There are general objections to paying a fee to use the station toilets, however, those who did use the toilets claimed that they were often of an acceptable standard, which mitigates the fee payment somewhat.

There was an extremely negative reaction when discussing the on board toilets, with respondents generally describing them as messy, smelly, unclean and not maintained during the journey. On board toilets are generally used only when absolutely necessary, and as near to the beginning of the journey as possible, before they get too messy.

There was also a strong dislike to the electronic door system. It makes passengers feel nervous as they worry about pressing the wrong button or having the door open on them while they are inside. This was particularly an issue for visually impaired respondents, who avoid these types of toilets altogether, as they cannot establish which button they should be pressing.

"The train toilets are shocking, absolutely awful…but I'm not sure you can blame the train company – you can't legislate for dodgy users, can you!" (Commuters)

8. Summary

Overall, passengers claim to be satisfied with the National Express East Coast on board experience.

Catering options are generally considered adequate and appropriate for train travel – there is thought to be no real need for extensive, gourmet options, which can feel incongruous with the concept of train travel.

The main barriers to purchasing on board catering are prices (which appear high in comparison with the High Street equivalent), range and to a lesser extent quality. Unless improvements are made here passengers are likely to continue to buy at stations.

As would be expected, the trolley and buffet carriage appear to be most often used as they are convenient, quick and offer the required types of food and drink (i.e. snacks). Resistance to At Seat Dining is high, due to discomfort with the idea of eating hot meals in a crowded environment where others are working. Awareness of the A La Carte offer is relatively low amongst Standard Class passengers, and reaction to the prices of the A La Carte menu is negative – it is considered excessively expensive for a train dining experience, and passengers do not envisage it to be a service they would use regularly. Passengers travelling between London and Edinburgh, however, were more positive to the concept of the A La Carte restaurant as they are more likely to require a hot meal during their journey, due to the length of the journey.

There were positive reactions to the concept of branded goods on the train, particularly coffees and sandwiches, as these are often consumed and the products where quality is most likely to be questioned. A fairly cynical response was evident to the concept of celebrity chef collaborations – some believe this to be gimmicky and that celebrity chefs are overexposed – however, a celebrity chef ‘overhaul’ of the menu and catering approach may be more acceptable than celebrity chef branded goods on board.

The provision of on-board free **wi-fi** is extremely positively received, as it enables business passengers and commuters to continue working while on the train and allows leisure travellers to browse the internet (regarded as a leisure activity). However, some clear issues with connectivity and speed of service mean that usability is limited, thus undermining some of the positive aspects of this offer

Generally, **catering staff, station staff and Train Guards** are viewed positively and considered helpful, friendly and proactive. However, there are some issues with inconsistency of service which may dilute overall service perceptions.

Overall, respondents were happy with **station standards** – the upkeep, cleanliness and maintenance of main stations is considered acceptable.

Parking is considered extremely expensive and it can be difficult to find a space, although only a few respondents were using this facility due to the nature of the sample. Waiting facilities were considered acceptable although again, few use these, as they normally arrive just in time for the train. There was some objection to paying for station toilets but passengers appreciate this may maintain certain quality standards. Train toilets, on the other hand, were generally thought to be of a poor standard, and only used if absolutely necessary.

9. Recommendations

Our recommendations based on this research are therefore as follows:

- greater communications regarding on board catering options may be beneficial – passengers are often unaware of the range of options and menu items available, and are pleasantly surprised on viewing them

- ensure consistency in the delivery of on board catering – i.e. trolley service must run as advertised, there must be hot water to make hot drinks and cold drinks must be cold

- consider extending the on board catering offer to include more vegetarian and healthy options (e.g. fruits and salads)

- consider the introduction of branded coffees, sandwiches and cakes – these are often-purchased items and passengers would take reassurance in quality of branded goods – as long as prices reflect High Street prices

- special offers and incentives may encourage Standard Class passengers to try the A La Carte menu – e.g. upgrade to First Class free on the condition you eat a meal in the restaurant

- aim to improve speed and connectivity issues with on board free Wi-Fi as this is potentially an area for great satisfaction and competitive advantage (e.g. over Virgin trains)

- ensure greater consistency in staff attitude and approach as currently this can vary widely

- consider more frequent monitoring and cleaning of on board toilets as this is currently an area of great dissatisfaction, and highly inconvenient for passengers

APPENDIX: GROUP DISCUSSION GUIDE

J9860
On Board Service Requirements
FINAL Discussion Guide
2 hour groups

Research Objectives:
• To understand passengers' experiences and opinions of National Express East Coast customer service on-board trains and at stations • Identify improvements for both catering, wi-fi and other services

1. Introduction / warm up (10 MINS)

- Moderator / CR introduction
- Topic for discussion: Experiences with National Express East Coast Rail customer service on-board trains and at stations
- Group length: **2 hours**
- Confirm MRS guidelines / confidentiality / video & audio-recording / observers
- Respondent introduction:
  - Occupation
  - Lifestyle
  - Home set up
  - Hobbies
  - Main method of transport used and why

2. Role of rail travel - BRIEFLY (10 MINS)

- Associations with rail travel (on flipchart)
- Three words to sum up rail travel
- Likes / dislikes
- Advantages / disadvantages
- Triggers / barriers for travelling by rail
- On what occasions do you use the train?
- How does rail travel fit with other methods of transport?

Moderator: Focus on business, commuting or leisure as appropriate to the group.

- How often do you use rail for travel for business, commuting or leisure?
  - Probe: journey length and usual travelling times
- Where do you travel from and to?

- Probe: destination stations travelled to, details of connecting services, interchanges with other modes of transport.
- Who do you travel with?
  - Probe: on their own or with other people?
- Do they make some journeys regularly and other journeys more often? If so which ones?
- What ticket types do you normally use? E.g. Season, Advanced, walk up

3. National Express East Coast Catering Services (40 MINS)

Explain that you would like to focus on catering service specifically

- Spontaneous associations with on-board catering *(write on flipchart)*
- Likes / dislikes of on-board catering
- What are the different types of catering services offered? Which services do you use?
  - Probe: trolley services selling snacks/ drinks at your seat, buffet counter selling refreshments, cooked-to-order hot meals (standard class), At Seat Dining service (first class), A La Carte restaurant
- How are the catering options normally communicated to you?
  - Probe: an announcement on train, via on board magazine, via rail staff on train, while on the train (e.g. seeing somebody else eating)
- Which of these is most effective, and why?
- What factors influence your decision to use on-board catering? i.e.
  - Spontaneous / planned decision? Probe on impact of lack of planning/ time or lack of other available catering
  - Do you deliberately/ consciously choose on board catering services for any particular reason?
  - Do these factors vary depending on what time of day you are travelling (i.e. whether it's for breakfast, lunch, dinner meals)

For each service (Buffet, Seat Trolley, Cooked to Order Hot Meals, At Seat Dining Service, A La Carte Restaurant) show menus as appropriate (see Appendix) and ask:

- What words would you use to describe it?
- What do you like/ dislike?
  - Probe: range and quality of food
  - Probe: convenience / security concerns (e.g. having to leave your seat)
- On what occasions do you use it?
- What refreshments do you buy?
  - Probe: ranges of food/ drink purchased, food/ drink considered quality or not good quality, repeat purchase behaviour
- To what extent do you feel the catering offers value for money?
- In your experience are the items you want always in stock?
  - Probe: catering unavailable because of a technical fault?

- If you had to choose between the trolley and the buffet, which would you choose? Why?
- What are the benefits of having both?

- How important are staff in terms of your perceptions on quality of on-board catering?
  - Probe: role/ delivery by staff e.g. are they proactive in offering catering? Are you happy for them to be proactive in this way?
  - How would you describe the demeanour of staff?
  - What could the staff do differently to increase your level of satisfaction?

- How does on-board catering compare with catering on other types of journeys you have been on?
  - Probe: food in rail stations (on train and in station), airports (in airports and on planes), high street, motorway service stations
  - Probe: strengths and weaknesses of each

Moderator: Ask which respondents have travelled on National Express East Coast when it was formerly GNER (i.e. those travelling over 2 years on the service)

- What are your views of the catering services when it was GNER?
- What has changed?
  - Probe: changed for the better/ worse? Why?
  - Probe: different types of food available? Different quality of service? Different prices?
- What can National Express East Coast learn from GNER?

ASK FIRST CLASS PASSENGERS

At Seat Dining

- How often do you use At Seat Dining? (if necessary explain At Seat Dining is where customers get a cooked meal brought to their seat)
- What occasions do you use it?
- How would you describe the At Seat Dining service?
  - Probe: likes/ dislikes, pros and cons
- How important is it to get a cooked meal on the train? Which meals is it most important to get a cooked meal for? (breakfast, lunch, dinner)
- How important is it that the meal has been cooked to order on the train (rather than an airline-style pre-prepared tray concept)
- What do you think about the quality, range and value for money offered by the current At Seat Dining?
- To what extent are you content with the speed at which the catering is provided?
- How does this compare with other catering services available?
  - Probe: eating in a separate dining car or at seat?
  - Probe: first class food in airports (e.g. in first class lounge areas and in first class planes), rail stations
- What factors influence your selection of At Seat Dining? i.e.
  - Spontaneous / planned decision? Do you deliberately/ consciously choose At Seat Dining for any particular reason?
  - To what extent is a lack of planning/ time or lack of other available services a factor in selecting At Seat Dining?
  - Does these factors vary depending on what time of day you are travelling (i.e. whether it's for breakfast, lunch, dinner meals)
- What elements would you like to see included into the At Seat Dining to make it more appealing? E.g. different food/ drink ranges, more variety, faster service.

- How important are staff in terms of your perceptions on quality catering services?
- How would you describe the level of service you get from staff in first class?
- What are your views towards the range and quality of complimentary items in first class?

First Class passengers who have not used At Seat Dining

- Reasons for not using At Seat Dining?
- How do you feel when sitting next to someone who is eating?
  - Probe: effect of smell of food, sound of eating impacting ability to work and overall travelling experience
- What would encourage you to use At Seat Dining?

Experiences of First Class catering offer on other train companies

- What can National Express East Coast learn from First Great Western, East Midlands Trains, Cross Country, Virgin Trains, Eurostar
- Views about included-in-the-price 'free' food in First Class? (i.e. versus pay for what you want)

4. Ideas for improving on board catering (20 MINS)

Moderator: East Coast have a few ideas for improving drinks and food options for on board catering services that we'd like to discuss with you. Explain that you will go through one idea at a time.

- **Idea 1: high street coffee. Introduce Kenco, Starbucks, Costa Café Nero brands**
- **Idea 2: sandwiches. Introduce M&S, Waitrose brands**
- **Idea 3: alcoholic beverages: John Smiths, Old Speckled Hen brands**
- **Idea 4: cakes and deserts: Fabulous Bakin' Boys (muffins), small artisan-style bakery brands**

For each idea ask:

- What do you think about the idea of **these types of brands (although not necessarily these specific brands)** being available on board?
- How would they impact your on board experience? Why?
- Which ones would make you more or less likely for you to purchase? If not, what brands would make it likely for you to purchase? Why?

- What views on celebrity chef catering?
  - Probe: James Martin, Flybe, Heston Blumenthal, Ainsley Harriott, Little Chef
  - Probes: likes/ dislikes
- How would you feel if catering included celebrity chef food like the ones mentioned?
  - Probes: Gimmicky? Credible?
- To what extent would you having celebrity chef meals positively impact your travelling experience?

- Probes: which celebrity chefs would be seen as appropriate or motivating brands to have?
- How would you feel if the announcement on the train said "The (enter name of preferred brand) bar is now open (e.g. the Costa bar is now open)

5. National East Coast Wi-Fi Services (10 MINS)

Explain that you would like to focus on on-board Wi-Fi service specifically

- What do you know about Wi-Fi services on board trains?
- Is it available on all train services or only some?
- How is the Wi-Fi service normally communicated to you?
  - Probe: an announcement on train, via on board magazine, via rail staff on train, while on the train (e.g. seeing somebody else eating)
- Which of these is most effective, and why?
- On what occasions do you use it?
  - Probe: long/ short distance travelling, specific work focus vs. browsing internet for other reasons
- What are the advantages/ disadvantages of Wi-fi as an on board service? What do you like/ dislike about it?
- What are your experiences of using Wi-fi services?
  - Probes: connection issues, download speeds, usability issues, instructions on how to use?
- How important is it to have on board Wi-fi on National Express East Coast? Why? Ask respondents to present scenarios where Wi-fi brings value?
- To what extent does having Wi-fi service influence the mode of transport you select? For example if respondents didn't have Wi-fi how do they think this would impact on them?
- How could the on-board Wi-fi service be improved?

6. Helpfulness and Attitude of On Board Staff (10 MINS)

- How would you generally describe the Train Guards on board the train?
- What are they good at/not so good at?
- What words would you use to describe the service you normally receive?
- How would you describe the Guard's approach to ticket checking?
  - Probe specifically for handling of lost tickets / underpaid tickets / on the wrong train etc
- How could your satisfaction with staff be improved?

7. Improving Station Standards (15 MINS)

Explain to respondents you would now like to focus on train stations they visit where they use National Express East Coast Service

- What are your views on the general upkeep, quality and services available at stations (i.e. car parking, station staffing, toilets at station, facilities to wait for the train, ticket barriers)
  - Probes: pros and cons of each
- What aspects of station standards need to be improved?
  - Probes: car parking, station staffing, toilets at station, facilities to wait for the train, ticket barriers

- Regarding car parking, what needs to be improved?
  - Probes: having more car spaces, making it easier to pay, improving cleanliness and maintenance in the car park
- Regarding station staffing, what needs to be improved?
  - Probes: more visible station staff, improving staff attitude and helpfulness, improving staff knowledge at times of disruption
- Regarding toilets, what needs to be improved?
  - Probes: having more cubicles/urinals, improving the cleaning and maintenance of toilets, extending the hours toilets are open
  - What about the toilets on the train – how would you describe these?
  - How could on-train toilets be improved?
- Regarding waiting facilities, what needs to be improved?
  - Probes: having more seats, extending platform canopies to protect passengers from rain, improving cleanliness and maintenance of waiting areas

- Regarding automatic ticket barriers at stations:
  - Likes / dislikes of these?
  - Advantages / disadvantages?

  For passengers using Kings Cross:
  - Likes / dislikes of manual ticket checks on the platform

8. Summary (5 MINS)

- overall what is your level of satisfaction with National Express East Coast on board services?
- what are the three key improvements that would enhance your experience of National Express East Coast on board services?
- if you were responsible for increasing passengers' satisfaction with National Express East Coast on-board services, what would you do?

THANK RESPONDENTS AND CLOSE

Appendix B

Passengers' priorities for improvement: Intercity East Coast

(September 2009)

Stated preference values – ranking of most important things that could be improved on the route.

Total Sample

Base: All Respondents	Priorities for improvement (1=highest priority and 12=lowest)
Punctuality and reliability of the train	1
Value for money for the price of the ticket	2
Being able to get a seat on the train	3
Length of time the journey was scheduled to take (speed)	4
Facilities and services on board the train	5
Frequency of trains for this journey	6
Provision of information about train times/platforms	7
Personal security while on board the train	8
Personal security at the station	9
Ticket-buying facilities	10
Ease of getting to and from the station	11
Facilities and services at the station	12
Overall	

East Midlands & Peterborough

Base: East Midlands & Peterborough	Priorities for improvement (1=highest priority and 12=lowest)
Value for money for the price of the ticket	1
Punctuality and reliability of the train	2
Being able to get a seat on the train	3
Frequency of trains for this journey	4
Length of time the journey was scheduled to take (speed)	5
Facilities and services on board the train	6
Personal security at the station	7
Provision of information about train times/platforms	8
Ticket-buying facilities	9
Ease of getting to and from the station	10
Personal security while on board the train	11
Facilities and services at the station	12
Overall	

Yorkshire

Base: Yorkshire	Priorities for improvement (1=highest priority and 12=lowest)
Punctuality and reliability of the train	1
Value for money for the price of the ticket	2
Being able to get a seat on the train	3
Length of time the journey was scheduled to take (speed)	4
Facilities and services on board the train	5
Frequency of trains for this journey	6
Personal security at the station	7
Personal security while on board the train	8
Provision of information about train times/platforms	9
Ticket-buying facilities	10
Ease of getting to and from the station	11
Facilities and services at the station	12
Overall	

North East England

Base: North East England	Priorities for improvement (1=highest priority and 12=lowest)
Value for money for the price of the ticket	1
Punctuality and reliability of the train	2
Being able to get a seat on the train	3
Length of time the journey was scheduled to take (speed)	4
Facilities and services on board the train	5
Frequency of trains for this journey	6
Personal security while on board the train	7
Personal security at the station	8
Provision of information about train times/platforms	9
Ticket-buying facilities	10
Facilities and services at the station	11
Ease of getting to and from the station	12
Overall	

Scotland

Base: Scotland	Priorities for improvement (1=highest priority and 12=lowest)
Punctuality and reliability of the train	1
Value for money for the price of the ticket	2
Being able to get a seat on the train	3
Length of time the journey was scheduled to take (speed)	4
Facilities and services on board the train	5
Frequency of trains for this journey	6
Provision of information about train times/platforms	7
Personal security while on board the train	8
Personal security at the station	9
Ticket-buying facilities	10
Ease of getting to and from the station	11
Facilities and services at the station	12
Overall	

Appendix C

Examining the links between Customer Satisfaction and Performance East Coast

Examining the links between Customer Satisfaction and Performance
East Coast
Passenger Focus

Date: 15 December 2010

Examining the links between Customer Satisfaction and Performance
East Coast
Passenger Focus

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Examining the links between Customer Satisfaction and Performance
East Coast
Passenger Focus

Executive Summary

Evidence from a wide range of research, including that of Passenger Focus, has highlighted that punctuality and reliability of train services is one of the key determinants of each Train Operating Company's (TOC) National Passenger Survey (NPS) customer satisfaction score. However there is frequently a disparity between PPM (Public Performance Measure) and satisfaction levels.

This study examines the links between train performance and NPS customer satisfaction for East Coast (EC) Trains by taking over 9,000 NPS results for the four and a bit years from Spring 2006 to Spring 2010, matching each NPS respondent to the actual train they used and from this identifying the lateness they experienced on each occasion and how the precise level of punctuality affected their recorded levels of satisfaction.

Our key findings are:

- Satisfaction with punctuality is the largest influencing factor on overall satisfaction, therefore improving satisfaction with punctuality will improve overall satisfaction
- On average, passenger satisfaction with punctuality falls by 2% for every additional minute of lateness (the gradient) and Overall Satisfaction falls by between 0.5% and 1%
- The rate of change at which passenger satisfaction with punctuality varies with lateness is not constant. There appears to be a series of 'tipping points' at 2-4, 5-6 and 8-10 minutes of lateness suffered
- Perception of delay varies by frequency of travel and more frequent travellers are generally less satisfied and more sensitive to delay than those who don't travel as often. This largely explains why commuters and shorter distance travellers appear less satisfied than longer-distance passengers for the same level of delay.
- Not all passengers say they are satisfied with punctuality even when their service arrives on time or early (RTE) (the 'intercept'). Only 89% of passengers are satisfied (both overall and with punctuality) at RTE, and for frequent travellers this might be influenced by their previous (but recent) experience of delay.
- The overall satisfaction of frequent travellers is driven by satisfaction with punctuality
- Passengers travelling to intermediate (through) stations experience higher levels of small delays than those travelling to stations at which the train terminates. However, this variation is not reflected in passenger satisfaction, where passengers travelling to terminating stations are less satisfied than those travelling to through stations.
- Overall satisfaction, satisfaction with journey time, frequency, connections and ticket buying facilities falls as punctuality falls (lateness increases) and therefore there is a Halo effect associated punctuality for some (but not all) service attributes.

Introduction

1.1 Background

Passenger Focus is the independent national consumer watchdog charged with representing the views of passengers within the UK rail industry and a mission of 'getting the best deal for rail passengers'. Amongst other objectives, Passenger Focus seeks to understand the needs and experiences of rail passengers and to secure tangible and measurable improvements for rail passengers. To support these objectives, Passenger Focus commissions and publishes the twice-yearly National Passenger Survey (NPS), which is the benchmark measure of changes in customer attitude towards all elements of UK train travel, including train services and stations.

Evidence from a wide range of research, including that of Passenger Focus, has highlighted that punctuality and reliability of train services is one of the key determinants of each Train Operating Company's (TOC) NPS customer satisfaction score. However there is frequently a disparity between performance improvements achieved by a TOC (as measured by the Public Performance Measure or PPM; for East Coast, this is the proportion of trains that arrive within 10 minutes of the timetabled time) and the corresponding customer NPS satisfaction result. There may be many possible reasons for this, such as: time lags between improved performance and changes in public perception, differences in the distribution of delays that are not reflected in average performance measures, and the impact of cancellations.

This is the fourth report in a series; so far TOCs that have been examined are National Express East Anglia (NXEA), Cross Country (XC) and Northern. This study has built on the previous experience of the others and the approach taken this time has been to concentrate on examining how actual lateness experienced by NPS respondents affects their recorded levels of satisfaction.

This report provides the results of a study examining the links between train performance and NPS customer satisfaction for the long distance operator, East Coast (EC) Trains.

1.2 Current East Coast NPS and PPM Performance

When examining the performance of national operators in relation to their PPM[1] measure and comparing it to their customer satisfaction scores for punctuality from the NPS survey [2]it can be seen from the table below that there can be a high degree of variation.

[1] Based on ORR National Rail Trends – Chart 2.1b - 2010-11 Q1
[2] From Spring 2010 NPS Survey

Franchise Operator	Satisfaction	Satisfaction Rank	PPM	PPM Rank	Difference between Satisfaction Rank and PPM Rank
Merseyrail	95%	1	96.3	2	-1
c2c	94%	2	96.8	1	1
Chiltern Railways	93%	3	95.1	5	-2
Arriva Trains Wales	89%	4	95.6	4	0
Virgin Trains	89%	5	89.5	18	-13
East Coast	89%	6	87.5	19	-13
South West Trains	88%	7	95.9	3	4
First Scotrail	88%	8	94.5	7	1
Cross Country	88%	9	90.0	17	-8
East Midlands Trains	84%	10	94.3	8	2
TransPennine Express	84%	11	94.3	9	2
Northern	83%	12	93.6	10	2
First Great Western	83%	13	92.6	12	1
London Midland	81%	14	92.2	15	-1
Southern	79%	15	93.5	11	4
Southeastern	77%	16	92.2	14	2
National Express East Anglia	76%	17	92.0	16	1
First Capital Connect	73%	18	92.3	13	5
London Overground	63%	19	95.0	6	13

Looking at this information it can be seen that passengers are happier with long distance operators' performance (East Coast, Virgin and Cross Country) than their ranking of PPM suggests they should be. By comparison, London Overground's measured performance of PPM is far better than is suggested by their passengers' satisfaction.

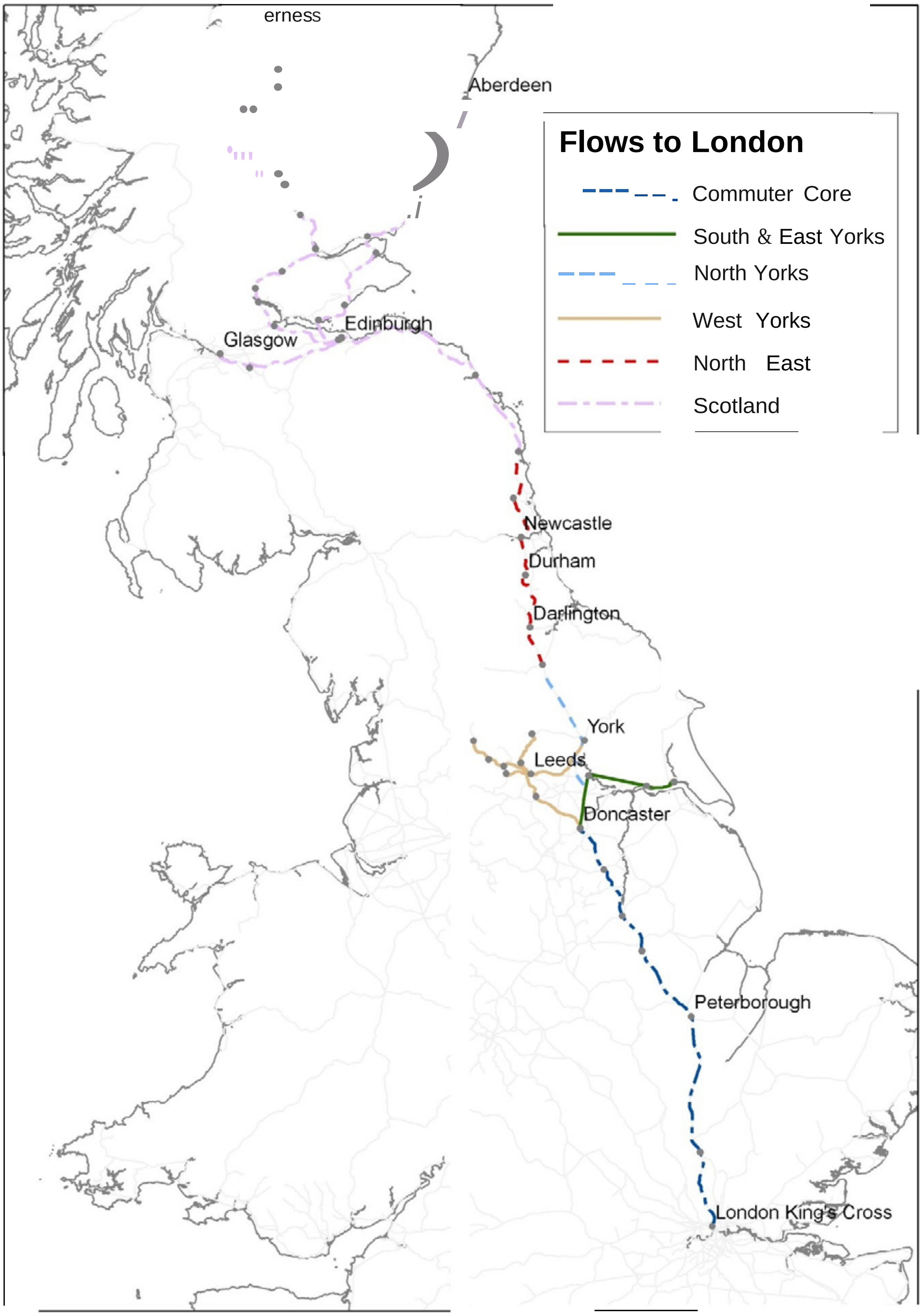
1.3 Geographical Scope of Analysis

In consultation with Passenger Focus and EC, it was decided to use the flows that are already established within EC. These are scoped out below:

- London <> Commuter Core
- London <> North East
- London <> North Yorkshire
- London <> Scotland
- London <> South & East Yorkshire
- London <> West Yorkshire
- Non - London North (Northern flows)
- Non – London South (Other flows)

It should be noted that when weekend engineering works have occurred some (London <> Scotland) trains have been rescheduled and diverted to run via Carlisle.

A route map displaying the routes geographically is shown in Map 1 below:


erness
Aberdeen
Flows to London
Commuter Core
South & East Yorks
North Yorks
West Yorks
North East
Scotland
Glasgow
Edinburgh
Newcastle
Durham
Darlington
York
Leeds
Doncaster
Peterborough
London King's Cross

Map 1

1.4 Overview of Data Used

1.4.1 NPS Records

Passenger Focus conducts an NPS in the Spring and Autumn each year. Our analysis is based on data from the last nine waves (waves 14 to 22), covering a period of four years from Spring 2006 to Spring 2010 and providing over 9,000 individual observations.

1.4.2 Train Performance Records

Data on actual performance of every EC service which calls at a station within the geographical scope of the study over the past four years has been derived from the TOC's Bugle[3] records. This gives details of the punctuality of all scheduled trains on arrival at each EC stations. This dataset also includes details of trains which were cancelled (or part cancelled for some of their route).

Throughout this analysis, trains arriving early have been treated as arriving on time (i.e. no benefit is assumed for trains arriving before their scheduled time), they are described as 'right time or early' (RTE).

1.4.3 Dates

Different sources of data use different terminology in the definition of date.

Each NPS survey is referred to as a "wave"; the Spring wave is carried out over a period of ten weeks between January and April, to fit in before Easter, and the Autumn wave over ten weeks from September to November. This may be important in comparing satisfaction to performance, since the Autumn wave includes periods of traditionally low levels of performance due to leaf-fall, and Spring may include periods affected by severe weather, such as snow, whilst the summer months are not surveyed.

The railway industry divides the year into 13 four-week periods, starting on the 1st of April each year. In terms of labelling, the year is taken as the year ending, thus the period ending in March 2008 is the thirteenth period of the 2007/08 year and referred to as 2008/P13, whilst the following period starting in April 2008 is the first period of the 2008/9 year and is referred to as 2009/P01. In this report, data may be aggregated into calendar quarters, with the first quarter covering periods P11 to P13 (i.e. January to March), and whilst these do not exactly match to NPS waves, a reasonable match may be used for comparison and this is shown below.

[3] Bugle is the system which TOCs use to generate details of train performance, in terms of the lateness of every train at each monitoring location on each day

Wave	Season	Year	Months	RSP Periods	Calendar Quarter	Timetable Name
Wave 14	Spring	2006	Jan-April	2006/P11-2007/P1	2005/6 Q1	December 2005
Wave 15	Autumn	2006	Sept-Nov	2007/P06-2007/P09	2006/7 Q4	June 2006
Wave 16	Spring	2007	Jan-April	2007/P11-2008/P1	2006/7 Q1	December 2006
Wave 17	Autumn	2007	Sept-Nov	2008/P06-2008/P09	2007/8 Q4	May 2007
Wave 18	Spring	2008	Jan-April	2008/P11-2009/P1	2007/8 Q1	December 2007
Wave 19	Autumn	2008	Sept-Nov	2009/P06-2009/P09	2008/9 Q4	May 2008
Wave 20	Spring	2009	Jan-April	2009/P11-2010/P1	2008/9 Q1	December 2008
Wave 21	Autumn	2009	Sept-Nov	2010/P06-2010/P09	2009/10 Q4	May 2009
Wave 22	Spring	2010	Jan-April	2009/P11-2010/P2	2009/10 Q1	December 2009

Along with the need to remember that NPS is a sample, and therefore will have a degree of sampling error, the above table shows that NPS does not continuously survey passengers through the year, and therefore changes in performance during some periods may not be specifically reflected in results. That said, comparing published annual PPM results with the punctuality experienced by the NPS sample shows only a small variation:

Year	Published PPM	PPM of NPS Sample
2006/7	82.7	83.9
2007/8	82.6	82.6
2008/9	86.9	87.7
2009/10	87.4	88.0

2 NPS Data

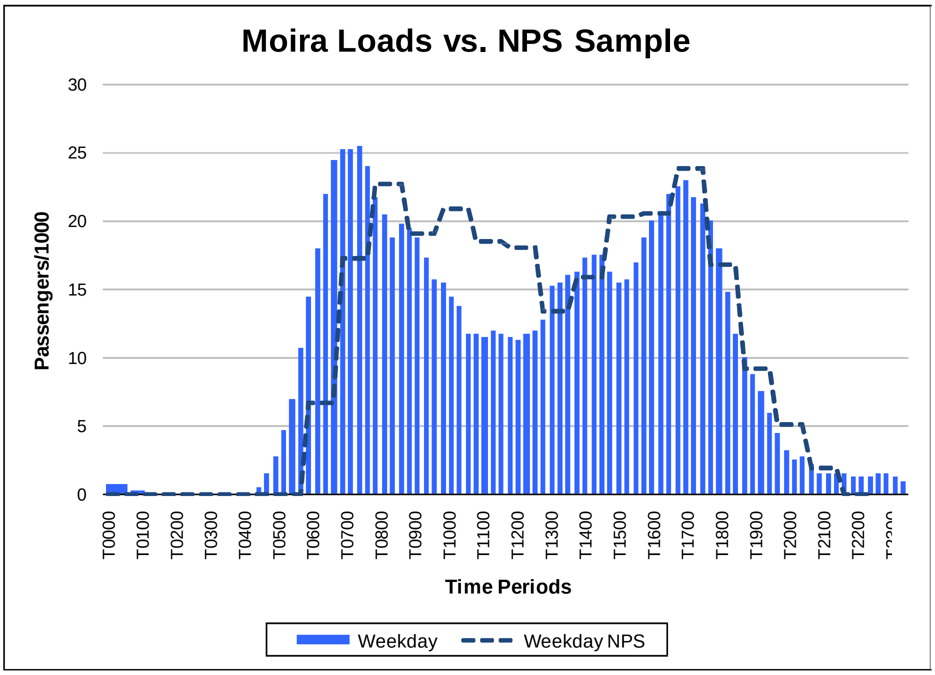
2.1 Data Used in Analysis

There are a total of 9863 NPS records for East Coast services over the nine waves analysed (waves 14 – 22), of this 95% have been matched to Bugle (i.e. the actual train service used, and its lateness at each monitoring point is known), leaving 9406 NPS records to be used in the analysis. They are split by wave as shown below:

NPS Wave	NPS Records	NPS Records %
Spring '06	1041	11%
Autumn '06	985	10%
Spring '07	1055	11%
Autumn '07	1127	12%
Spring '08	1003	11%
Autumn '08	1104	12%
Spring '09	1029	11%
Autumn '09	954	10%
Spring '10	1108	12%
Total	**9406**	**100%**

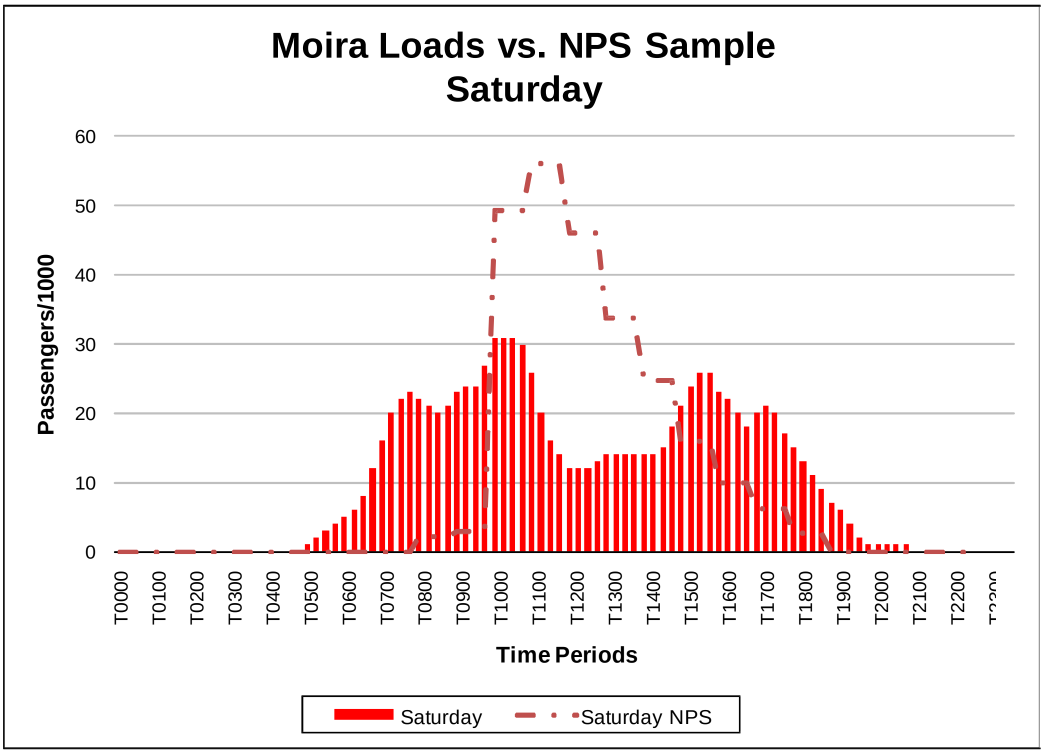
2.2 Time of Day and Day of Week

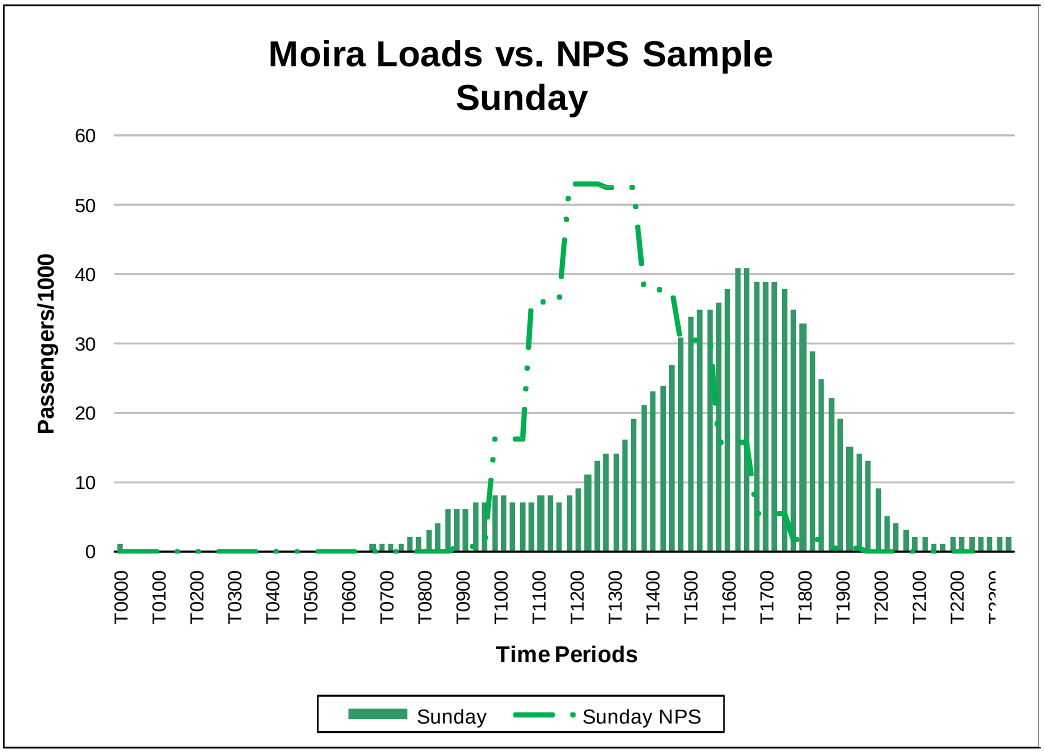
To ensure that the NPS sample used is representative of peak and off peak loadings we have checked the distribution of NPS respondents over the time of day and day of week. Expected demand profiles have been taken from the standard industry timetable tool, MOIRA. This shows that there appears to be a reasonable fit on weekdays, which is the majority of the sample, to negate the need for re-weighting of results.



At the same time it should be noted that sampling at weekends does not reflect the demand profiles, as can be observed in the graphs for Saturdays and Sundays below. This might require further consideration when conducting future surveys.

That said, in this instance, given the low volumes in the sample and relatively small variations in delay, the results remain representative without re-weighting.





2.3 Respondents by Route

The following table is a breakdown of the number of NPS respondents used in the analysis by route. The highest number of responses are for Non-London North (Northern flows), these cover those respondents who travelled from Doncaster and North to places other than London Kings Cross. Routes included in 'Other flows' are for locations further south of Doncaster and East Yorkshire to places other than London Kings Cross.

Overall, these provide a good distribution of results from across the EC network.

Flow	NPS Respondents	% NPS by route
London <> Commuter Core	1311	14%
London <> North East	1432	15%
London <> North Yorks	1141	12%
London <> Scotland	756	8%
London <> South & East Yorks	507	5%
London <> West Yorks	1273	14%
Non - London North (Northern flows)	1817	19%
Non - London South (Other flows)	1169	12%
Grand Total	**9406**	**100%**

3 Relationship between Satisfaction and Performance

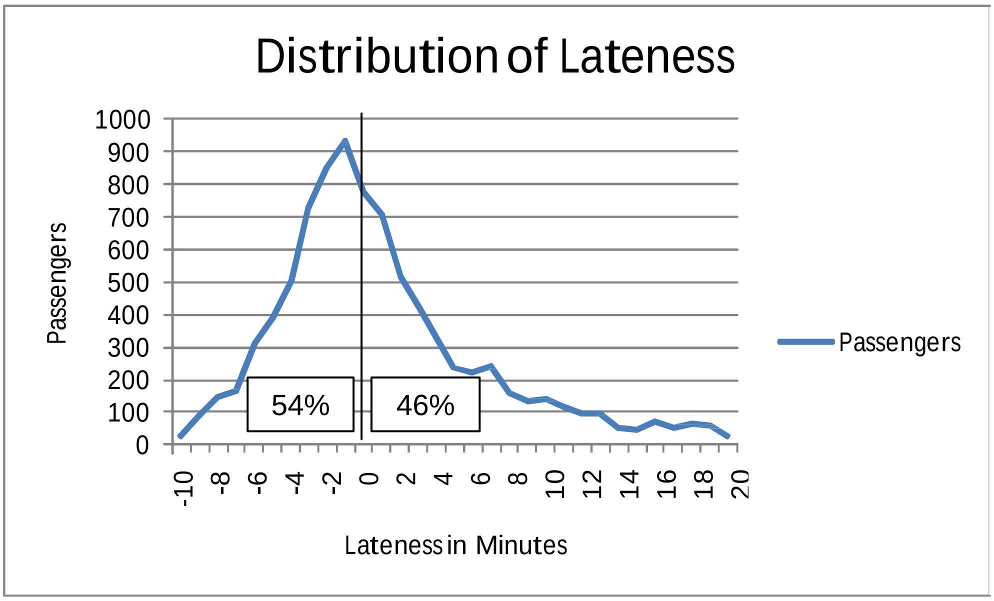
By matching each NPS respondent to the actual train used, we can identify the lateness experienced on each occasion for their specific station-to-station journey and can examine how the precise level of punctuality affects their recorded levels of satisfaction.

3.1 Satisfaction with Punctuality Over Time

For the study period as a whole, 81% of passengers were satisfied with the punctuality of their service and were on average 5.4 minutes late. Satisfied passengers on average experienced 3.4 minutes of average lateness compared with dissatisfied passengers who suffered 21.1 minutes.

	Satisfied	Neither	Dissatisfied	Total
Total	81%	10%	9%	9406
Average Lateness	3.4	6.8	21.1	5.4

The following graph shows the distribution of lateness. 54% of passengers arrive right time or early (RTE), whilst 13% of passengers are later than the PPM threshold at time to 10, and 6% of all passengers are more than 20 minutes late.



The following table shows the change in satisfaction, average lateness and PPM for the NPS respondents by wave. Autumn '07 (Wave 17) had the worst levels of punctuality and satisfaction and it is noted that this was around the time of franchise changeover from GNER to National Express East Coast (November 2007).

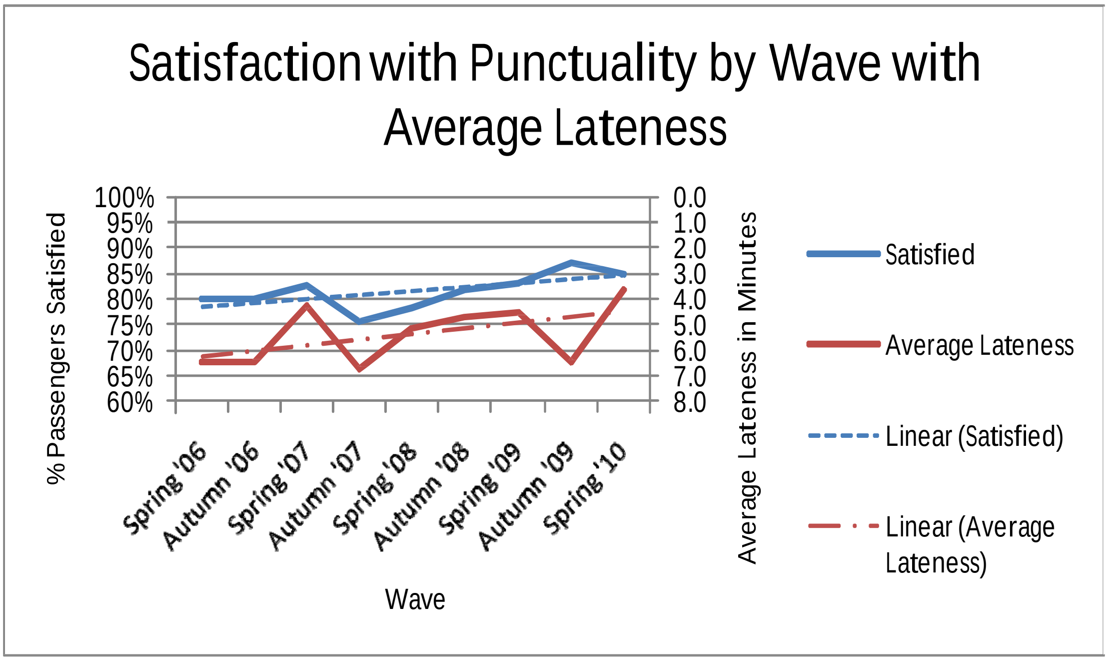
Punctuality & Satisfaction by NPS Wave	% satisfied	% Not Satisfied	Average Lateness	PPM of NPS Sample	% NPS sample outside PPM
Spring '06	80%	20%	6.5	83%	17%
Autumn '06	80%	20%	6.5	81%	19%
Spring '07	83%	17%	4.2	87%	13%
Autumn '07	76%	24%	6.7	82%	18%

Spring '08	78%	22%	5.2	83%	17%
Autumn '08	82%	18%	4.7	86%	14%
Spring '09	83%	17%	4.6	89%	11%
Autumn '09	87%	13%	6.4	89%	11%
Spring '10	85%	15%	3.6	88%	12%
Grand Total	**81%**	19%	5.4	**85%**	15%

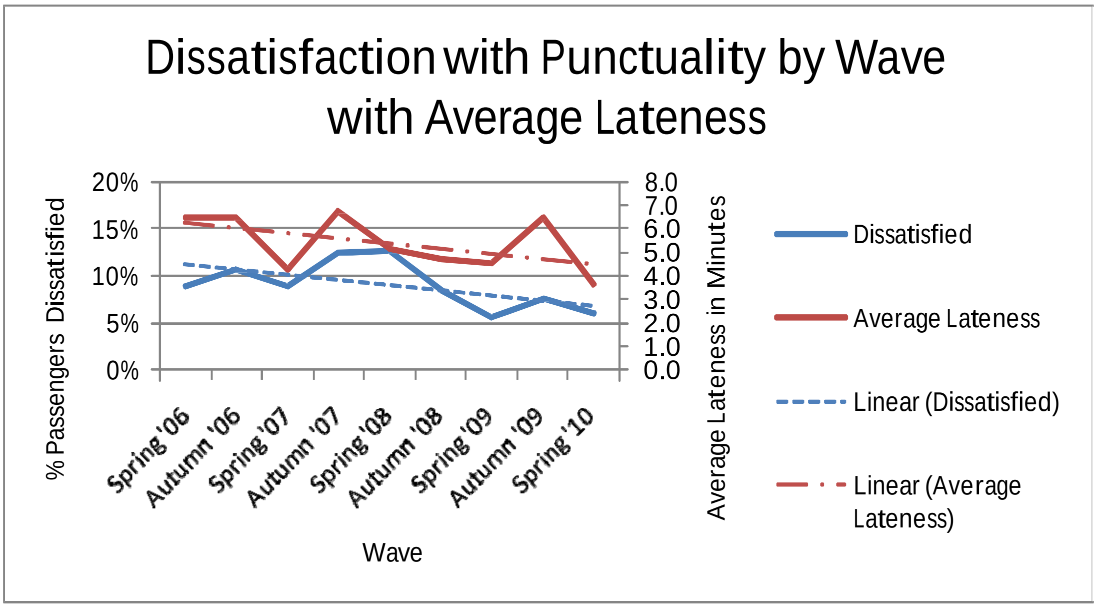
There has been an increase in satisfaction levels generally over time and there has been a corresponding, but slightly smaller, reduction in the levels of dissatisfaction over time. This can be seen by comparing the two graphs below.

On average there is only a small (1%) difference between Autumn and Spring waves, with lower levels of satisfaction being experienced in the Autumn when services are generally less reliable.

Over time, average lateness has improved slightly more than average satisfaction, as observed by the difference in the gradients of the straight lines in the graph below. This means that the rate of improvement in satisfaction will be slightly lower than the rate of improvement in average lateness.

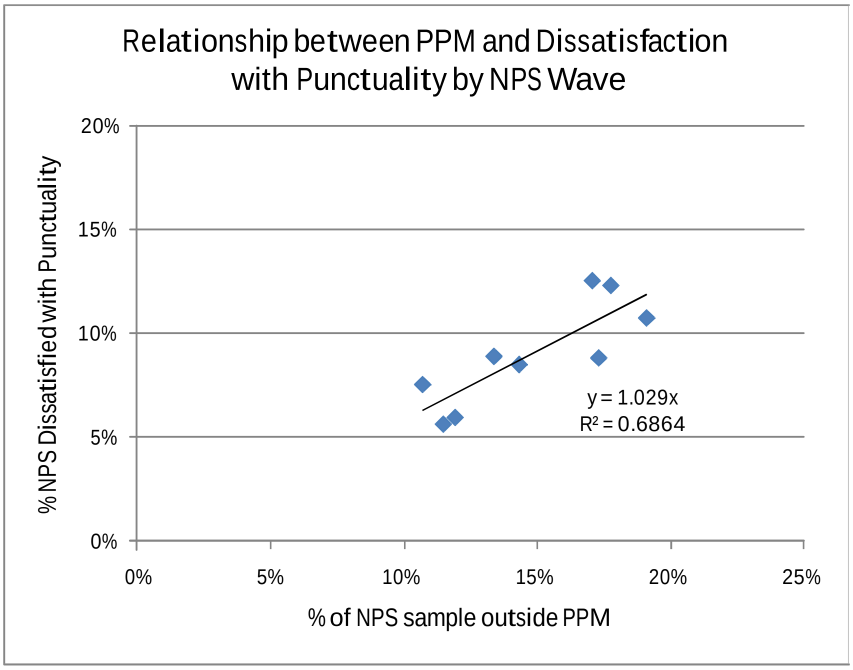


Dissatisfaction has fallen by approximately 5% over the time being studied and average passenger lateness has generally improved over time.



3.2 Relationship between Satisfaction and Journeys 'outside PPM' or Lateness

We expect satisfaction to decrease (and dissatisfaction to increase) as punctuality falls. For each NPS Wave, if we plot the proportion of passengers not satisfied (i.e. neither very or fairly satisfied) against the number of journeys in the NPS sample that fall outside the PPM score (more than 10mins late) we can see a relationship between the two (although the relationship is not so good at higher levels of delay).



Conversely, examination of the data shows dissatisfaction with punctuality increases 3% for every 1% increase in trains falling outside PPM.

3.3 Satisfaction with Punctuality by Distance

The highest levels of satisfaction have been observed on longer-distance flows (i.e. London to Scotland and London to the North East), even though, on average, passengers experience higher average lateness on their journey than that of the commuter core, which has the lowest average lateness.

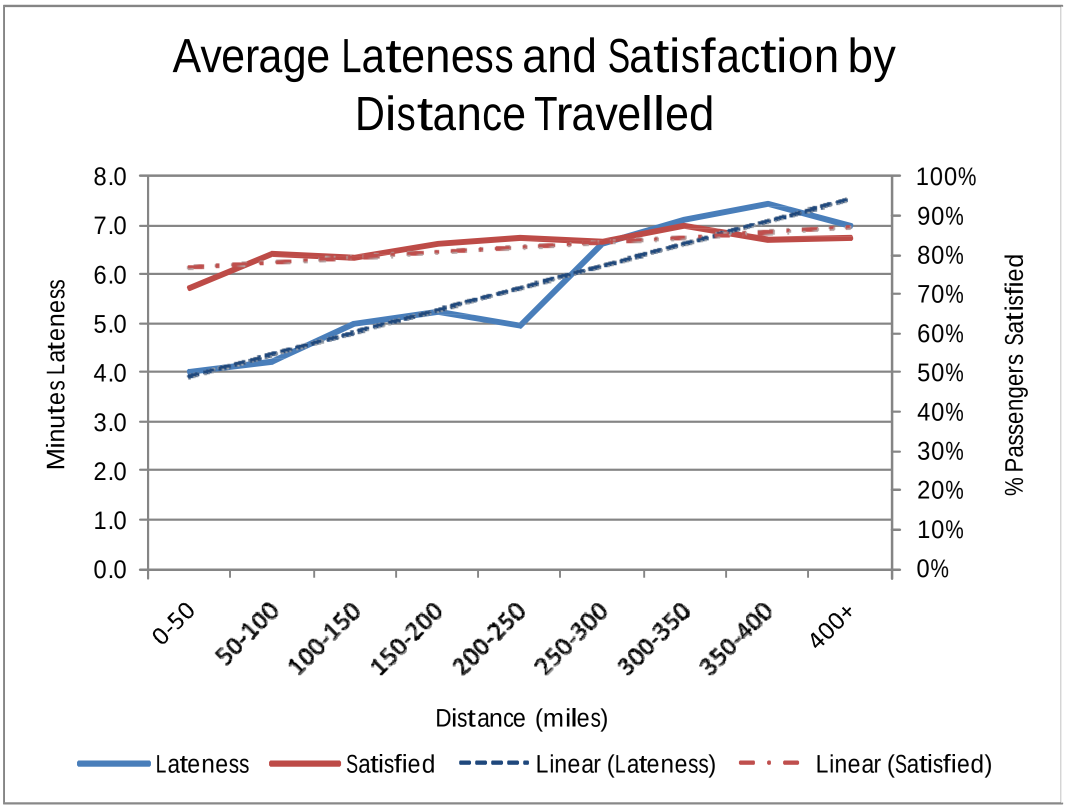
Flow	Satisfied	Neither	Dissatisfied	Total	Lateness
London <> Scotland	85%	8%	7%	756	7.2
London <> North East	84%	8%	8%	1432	5.8
London <> South & East Yorks	83%	10%	7%	507	6.1
London <> West Yorks	83%	10%	7%	1273	4.3
London <> North Yorks	82%	9%	9%	1141	6.0
Other flows	80%	11%	9%	1169	5.0
London <> Commuter Core	80%	10%	11%	1311	3.6
Northern flows	78%	11%	11%	1817	6.0
Grand Total	**81%**	**10%**	**9%**	**9406**	**5.4**

Examining the directionality of travel shows that there appears to be a 'funnel effect', Southbound (where there is more congestion as routes converge into London), meaning passengers experience higher average lateness and are less satisfied travelling into London than away. The flows in the table below are sorted by highest to lowest satisfaction in the Southbound direction.

	Satisfied		Lateness	
Flow	Northbound	Southbound	Northbound	Southbound
London <> Scotland	85%	84%	6.9	7.8
London <> West Yorks	83%	83%	4.0	5.0
Non - London North (Northern flows)	74%	82%	7.2	4.6
London <> South & East Yorks	87%	79%	8.0	4.0
London <> North Yorks	86%	78%	4.6	7.3
London <> North East	87%	78%	5.2	6.8
Non - London South (Other flows)	83%	78%	4.1	5.8
London <> Commuter Core	84%	75%	2.4	4.9
Overall	**83%**	**79%**	**5.1**	**5.7**

The average lateness of Southbound passengers is over half a minute more than Northbound passengers who, on average, suffer 5.1 minutes of delay.

We can also see there is a strong linear correlation between average lateness and distance travelled, meaning the further trains travel, the later they become. At the same time the distance travelled appears to have very little influence on the level of satisfaction with punctuality.



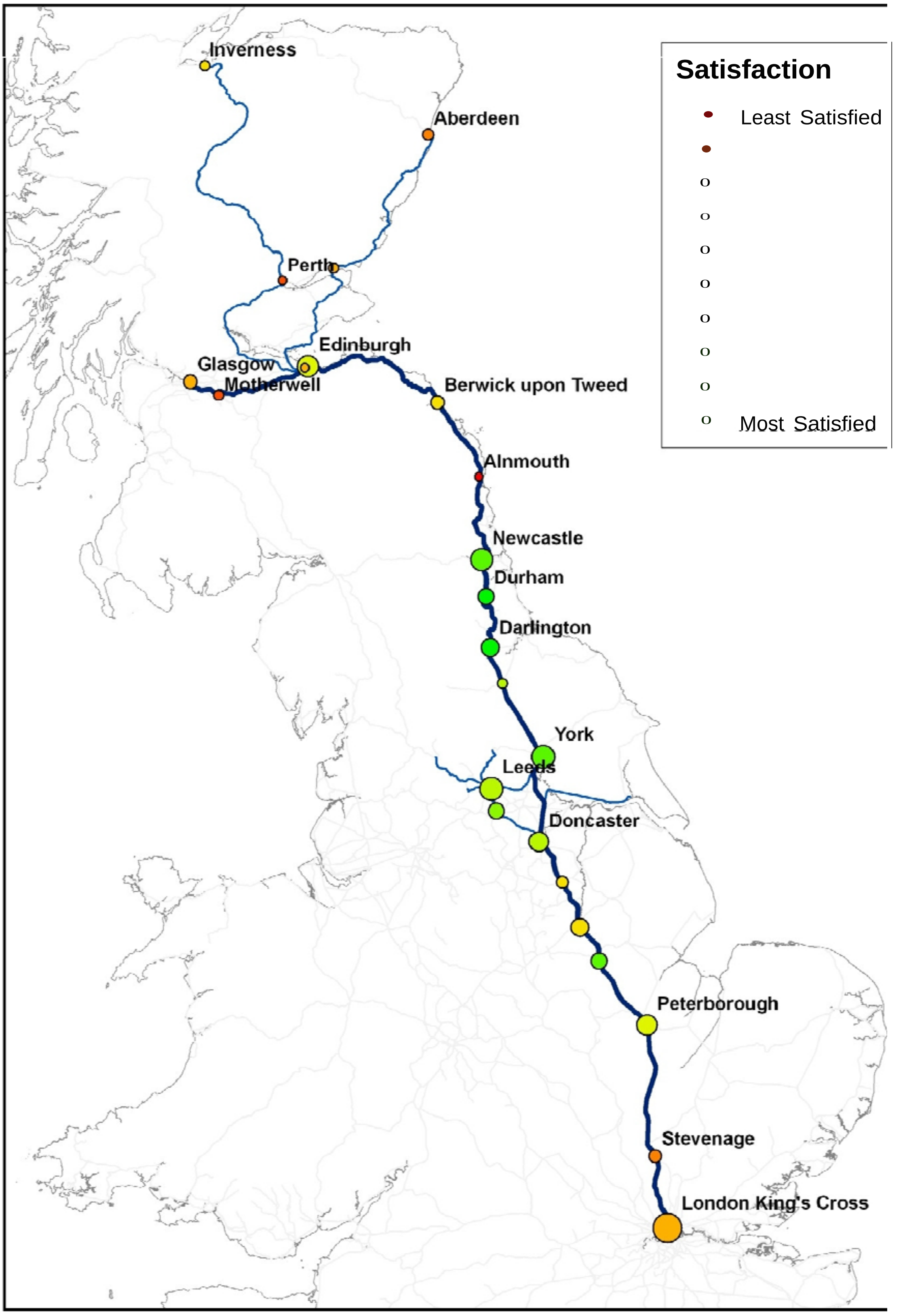
3.4 Satisfaction with Punctuality Geographically

There is no statistically significant relationship between the level of satisfaction with punctuality and the amount of average lateness suffered by station. The table below shows, for example, that Alnmouth (59% satisfaction, 6.2 average minutes late (AML)) and Perth (72% satisfied, 4.9 AML) have the lowest levels of passenger satisfaction despite having very different levels of lateness. Darlington and Durham have similar levels of lateness to Perth, but passengers are far more satisfied (86% satisfied, 4.8 & 4.9 AML respectively).

Destination Station	Satisfied	Ranked by Satisfaction (highest 1)	Lateness	Ranked by Lateness (least 1)	Difference in Rank
DARLINGTON	86%	1	4.8	8	-7
DURHAM	86%	2	4.9	11	-9
YORK	84%	3	5.0	12	-9
NEWCASTLE	84%	4	5.4	13	-9
GRANTHAM	84%	5	2.5	3	2
WAKEFIELD WESTGATE	84%	6	5.8	15	-9
DONCASTER	83%	7	6.2	17	-10
LEEDS	83%	8	3.1	5	3
NORTHALLERTON	83%	9	1.4	1	8
PETERBOROUGH	82%	10	4.4	6	4
EDINBURGH	81%	11	6.6	20	-9
RETFORD	80%	12	2.4	2	10
NEWARK NORTH GATE	80%	13	3.1	4	9
INVERNESS	80%	15	4.9	10	5
BERWICK-UPON-TWEED	80%	14	12.4	23	-9
HAYMARKET	79%	16	5.7	14	2
DUNDEE	79%	17	9.2	22	-5
LONDON KINGS CROSS	79%	18	6.0	16	2
GLASGOW CENTRAL	78%	19	6.3	19	0
ABERDEEN	78%	20	12.5	24	-4
STEVENAGE	77%	21	7.6	21	0
MOTHERWELL	74%	22	4.7	7	15
PERTH	72%	23	4.9	9	14
ALNMOUTH	59%	24	6.2	18	6

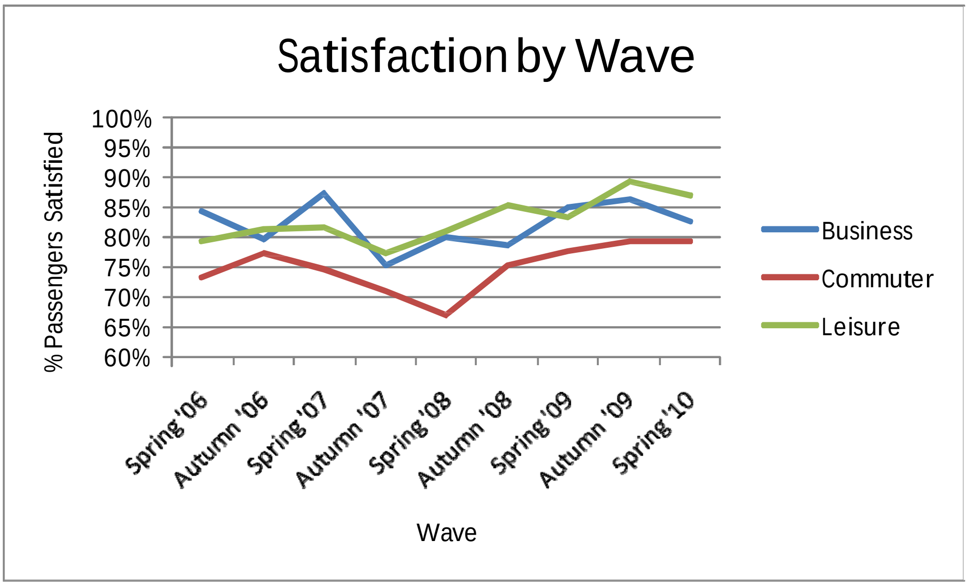
The findings from the above table correspond with the higher levels of satisfaction found on the London <> North East route. The map below shows, geographically how, satisfaction varies throughout the EC network[4], and confirms that there isn't an obvious link between satisfaction, AML and location.

[4] Note that the size of the circle at each location is a representation of the amount of demand



3.5 Satisfaction with Punctuality by Passenger Type

Previous studies have shown that commuters are much less satisfied than business and leisure passengers. There is a similar pattern for East Coast although in this case there is only approximately a 10% difference (past studies have shown up to 20%).



3.6 Satisfaction with Punctuality by Frequency of Travel

The table below shows that there appears to be an inverse relationship between satisfaction and lateness; the groups that suffer more lateness appear to be more satisfied. Clearly, this is counter-intuitive.

However, if we consider frequency of travel we can see that those passengers who travel least are more satisfied than those who travel more regularly i.e. once a week or more.

Frequency of travel	Travellers	Satisfied	Lateness
3 or more times a week	6%	69%	4.5
Once or twice a week	8%	78%	5.2
1 or 2 times a month	18%	81%	5.6
Once every 2-3 months	21%	83%	5.1
Once every 6 months	12%	84%	6.0
Less often	18%	84%	5.3
Never/First time today	16%	82%	5.4
Don't know/no answer	1%	69%	5.7
Grand Total	**9406**	**81%**	**5.4**

This helps to explain the previous findings concerning journey purpose or distance.

As we would expect, commuters travel much more frequently than business and leisure travellers, who have similar travel frequencies, and yet, the average delay experienced between commuters and other passengers is similar.

Frequency of travel by journey purpose (excludes First Time Travellers	Business	Commuter	Leisure	Total
Frequent (once per week or more)	12%	60%	3%	16%
Infrequent (less than once per week)	88%	40%	97%	84%
Total	**100%**	**100%**	**100%**	**100%**
Average Lateness	4.9	5.4	5.6	5.4

4 Perception of Delay

The NPS survey includes a question asking whether passengers have suffered a delay on their journey. Using actual train performance data we can see that 92% of passengers who travelled on trains arriving on time said they suffered no delay (but that 8% did state they had suffered a delay).

However, this also shows that 81% still said they suffered no delay when the train was between 1 and 5 minutes late. This falls to 51% for 6-10 minutes and 28% for 11-20 minutes.

Only 12% (sum of RTE to 11-20 delay) regarded a delay of less than 20 minutes as "serious". But for delays of at 20 minutes or more, 86% regarded their delay as either minor or serious.

Actual Lateness vs. Perception or attitude to delay	No delay	Yes: Minor delays	Yes: Serious delays	Grand Total
Right Time or Early	92%	7%	1%	100%
1-5	81%	18%	1%	100%
6-10	51%	47%	2%	100%
11-20	28%	66%	6%	100%
20+	14%	41%	45%	100%

For those arriving Right Time or Early (RTE) we can see that those stating they suffered a minor delay is higher for those who travel more frequently. This might suggest that when ranking satisfaction with punctuality "on the day of travel" that perception or attitudes are influenced to some degree by other factors amongst more frequent travellers.

Perception or attitude to delay for RTE passengers by frequency of travel	No delay	Yes: Minor delays	Yes: Serious delays	Grand Total
3 or more times a week	88%	11%	1%	100%
Once or twice a week	90%	8%	2%	100%
1 or 2 times a month	91%	8%	1%	100%
Once every 2-3 months	92%	7%	1%	100%
Once every 6 months	93%	6%	1%	100%
Less often	93%	6%	1%	100%
Never/First time today	93%	7%	1%	100%

One-third of regular travellers register a delay at 1-5 min lateness, compared to around one-sixth of less frequent travellers. This might be because more frequent travellers take into account their experience of delays on previous journeys, or possibly because regular travellers are more sensitive to delay (more likely to affect their lifestyle routine) or perhaps they are simply more aware of the scheduled journey time.

Perception or attitude to delay for passengers 1-5 min late by frequency of travel	No delay	Yes: Minor delays	Yes: Serious delays	Grand Total
3 or more times a week	68%	31%	1%	100%
Once or twice a week	73%	27%	1%	100%
1 or 2 times a month	81%	18%	2%	100%
Once every 2-3 months	82%	18%	0%	100%
Once every 6 months	86%	14%	0%	100%
Less often	83%	16%	1%	100%
Never/First time today	85%	14%	1%	100%

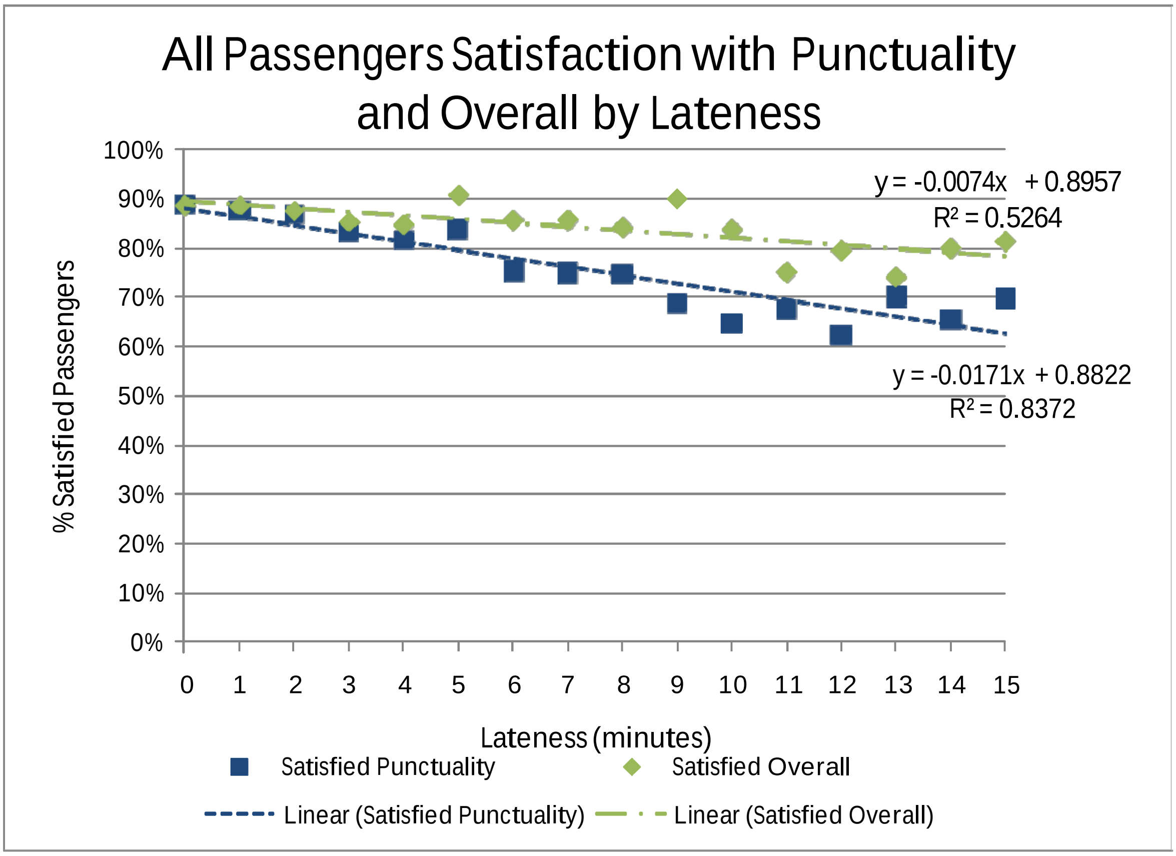
Comparing reactions to the same level of delay by frequent and infrequent travellers, we can see how frequent travellers are more sensitive to lower levels of lateness than infrequent travellers.

% of passengers regarding delay as Minor or Serious, by actual lateness	Frequent Traveller (once per week or more)	infrequent Traveller (less than once per week)
RTE	11%	8%
1-5	30%	17%
6-10	60%	47%
11-20	80%	70%
20+	90%	85%

5 Satisfaction "Gradient"

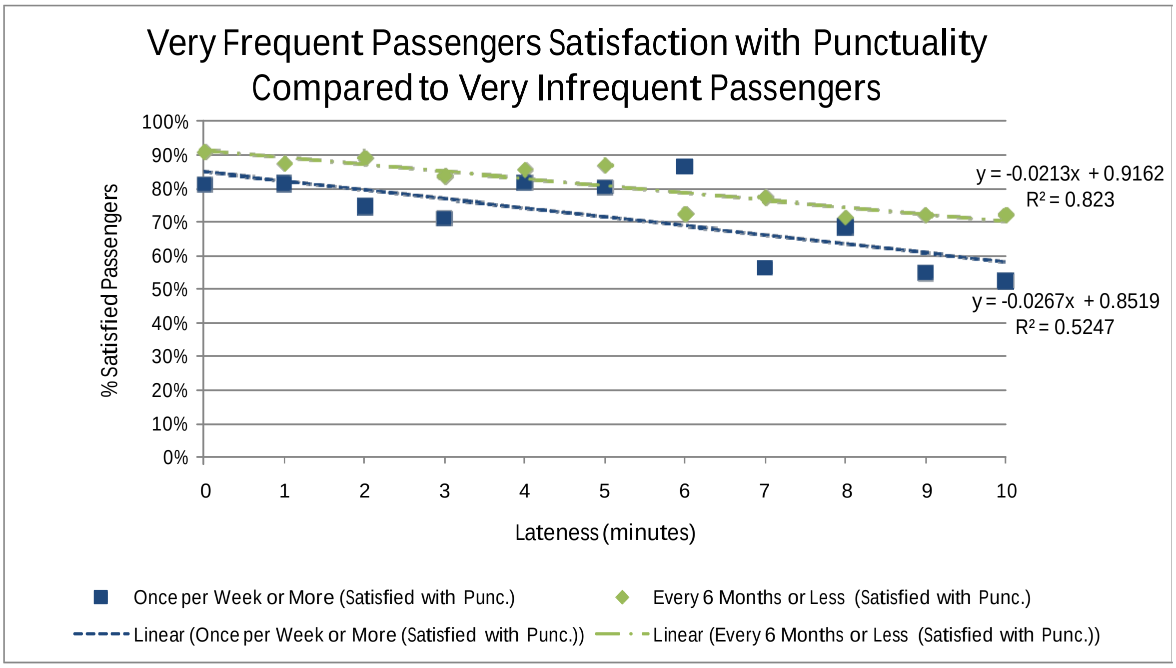
The rate at which satisfaction falls with increasing lateness can be plotted. This rate of change is referred to as the gradient and is shown on the graph below.

When examining the NPS question that relates to 'Overall Satisfaction with Trip' we can see there appears to be some relationship between lateness suffered although this isn't very strong (R^2 = 0.53). But as we might expect, there is a much stronger relationship between lateness and satisfaction with punctuality, which is the most suitable measure to use (R^2 = 0.84).

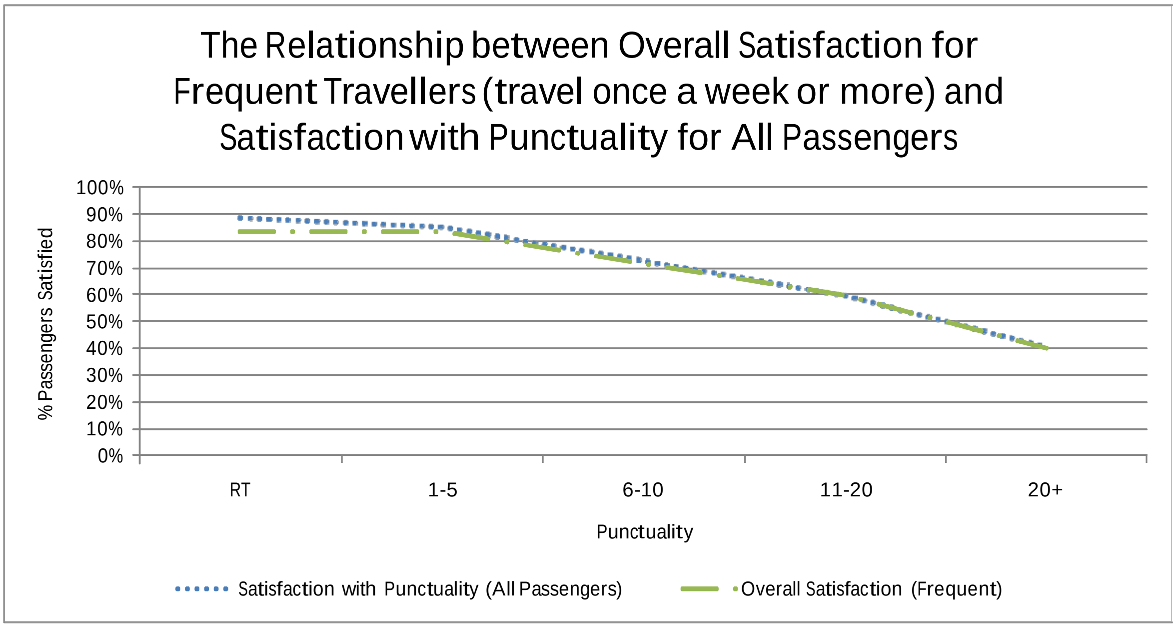


The proportion of passengers satisfied with punctuality falls as the lateness of the service increases (the gradient). For every additional minute of lateness, satisfaction falls by 2 %.

Earlier analysis has shown how satisfaction and perception of delay varies by frequency of travel. If we examine travel between very frequent travellers (once per week or more), and very infrequent travellers (less than once every six months), we can see a clear difference, with a 'gradient' of reduction of 2.1% satisfied per minute of lateness for very infrequent travellers compared with 2.7% for very frequent travellers.



Then when we examine the overall satisfaction of frequent travel and compare this to the satisfaction with punctuality for all passengers we can see that the overall satisfaction of frequent travellers is driven by satisfaction with punctuality.

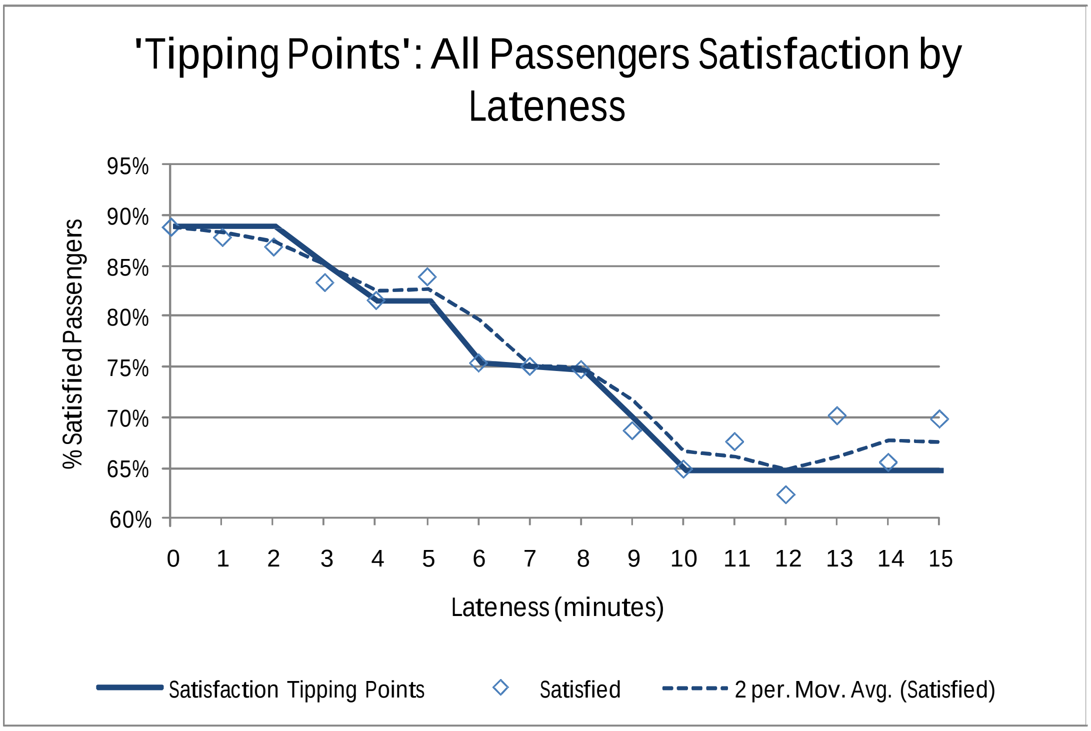


6 Satisfaction Tipping point

While the previous section indicates that satisfaction decreases gradually with increased lateness, the rate of change is not constant, and the graphs below show that the 'gradient' is shallow for lower levels of lateness. This might suggest a 'Tipping Point' (or series of tipping points), below which passenger awareness is lower, or concern over the delay is lower, and then change rapidly at given levels of delay.

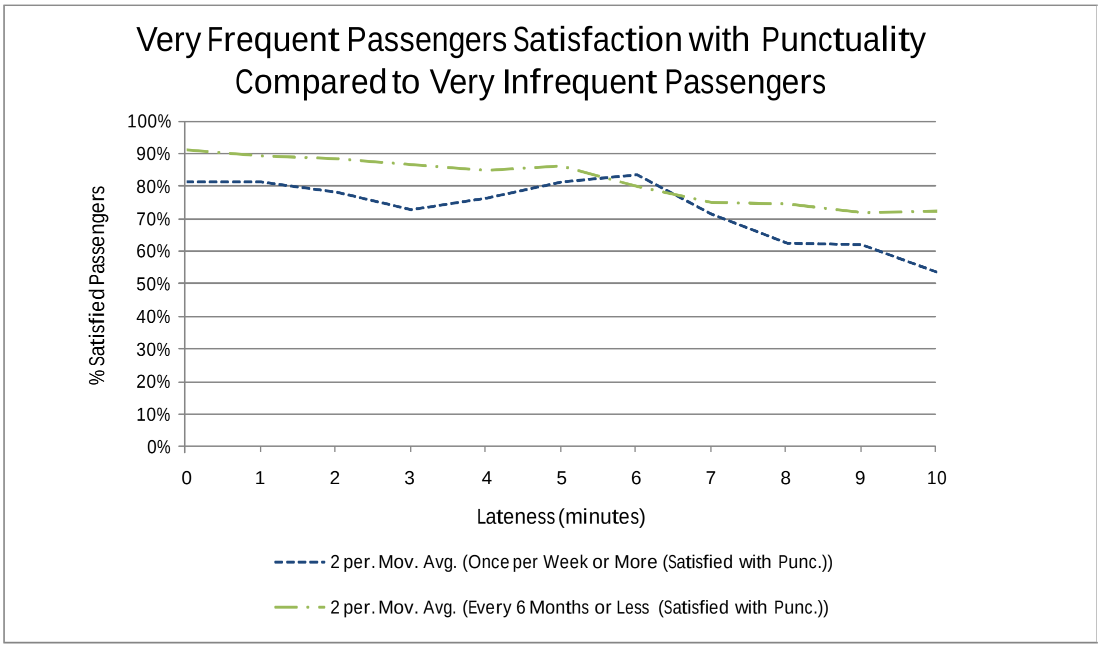
Examination of the data shows that potential Tipping Points appear around:

- 2-4 minutes
- 5-6 minutes
- 8-10 minutes



If we consider very frequent and very infrequent travellers (and apply an average over two minutes of delay to smooth results, a 2 point moving average), we can see this effect is particularly pronounced for very frequent travellers, although it can still be seen for very infrequent travellers (albeit less conclusive).

The Tipping Point is shown at 5-6 minutes when examining satisfaction with punctuality for frequent travellers.

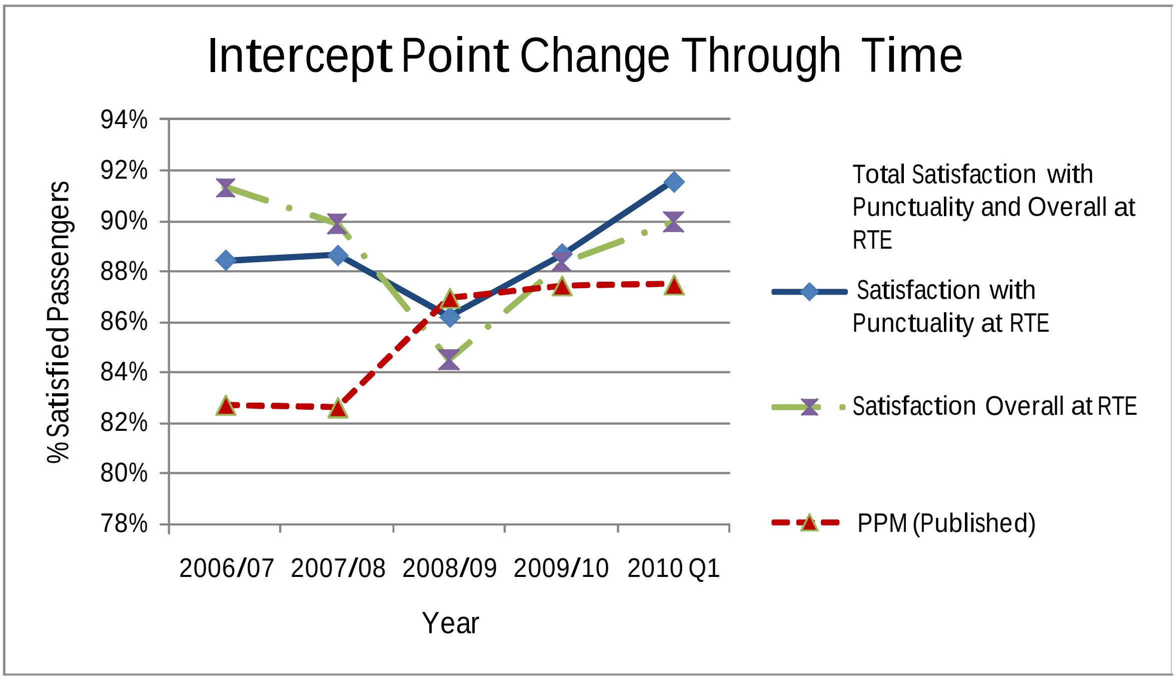


Very Frequent Passengers Satisfaction with Punctuality Compared to Very Infrequent Passengers
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
% Satisfied Passengers
0
1
2
3
4
5
6
7
8
9
10
Lateness (minutes)
2 per. Mov. Avg. (Once per Week or More (Satisfied with Punc.))
2 per. Mov. Avg. (Every 6 Months or Less (Satisfied with Punc.))

7 Satisfaction "Intercept"

This section, and the previous analysis examining perception to delay, has shown that even for services arriving Right Time or Early not all passengers are satisfied with punctuality. The reasons for this are unclear, but may provide further insight into the perception of punctuality and delay over time of by different passenger types.

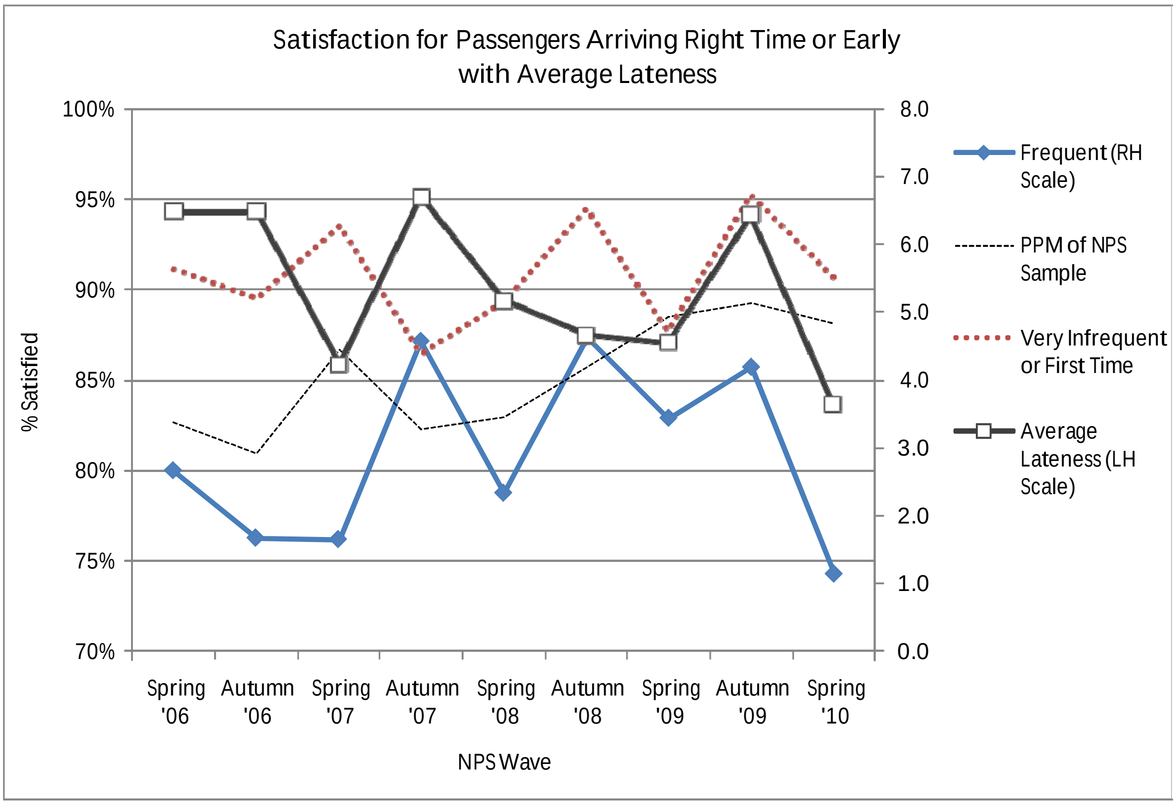
The graph below shows that total satisfaction with punctuality over the whole study period (waves 14-22) averaged at 88% for passengers that were RTE (the blue block background in the graph below). When looking at PPM and satisfaction (both with punctuality and overall) over time at RTE we can see there is little or no obvious relationship.



Those passengers travelling more frequently give a lower rating for punctual services on the day of travel than for infrequent travellers. This is consistent with findings from other TOCs with high proportions of commuters, and where this difference has previously been seen between commuters and business or leisure travellers.

For passengers arriving Right Time or Early (RTE), if we plot the proportion of passengers satisfied over time and compare this with performance, we can see that those travelling very infrequently or for the first time have a consistently higher satisfaction than those who travel more frequently.

Furthermore, the graph shown below might suggest that proportion of frequent travellers who are satisfied may be related to the average lateness seen during the period, and that therefore the intercept value might be influenced by previous (but recent) experience of delay (Note the sample size is relatively small).



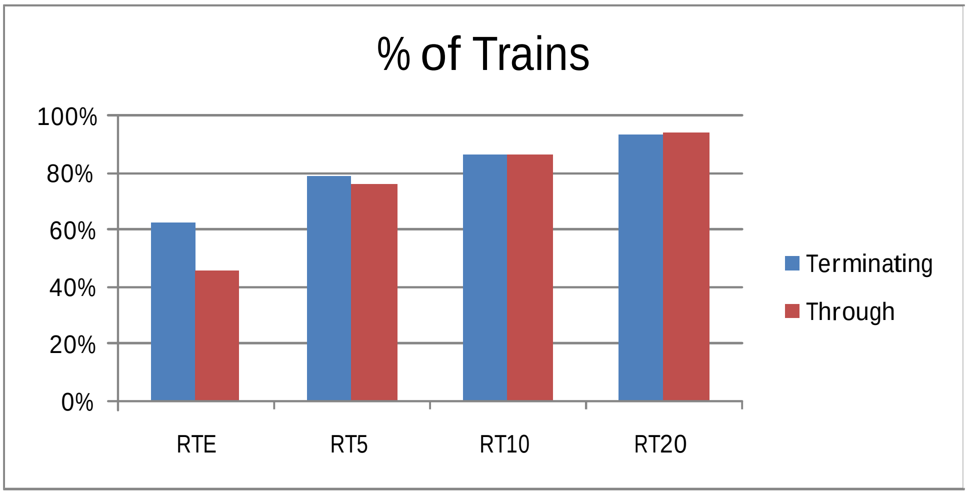
Satisfaction for Passengers Arriving Right Time or Early with Average Lateness
100%
95%
90%
85%
80%
75%
70%
% Satisfied
8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0
Spring '06
Autumn '06
Spring '07
Autumn '07
Spring '08
Autumn '08
Spring '09
Autumn '09
Spring '10
NPS Wave
Frequent (RH Scale)
PPM of NPS Sample
Very Infrequent or First Time
Average Lateness (LH Scale)

8 Through vs. Terminating

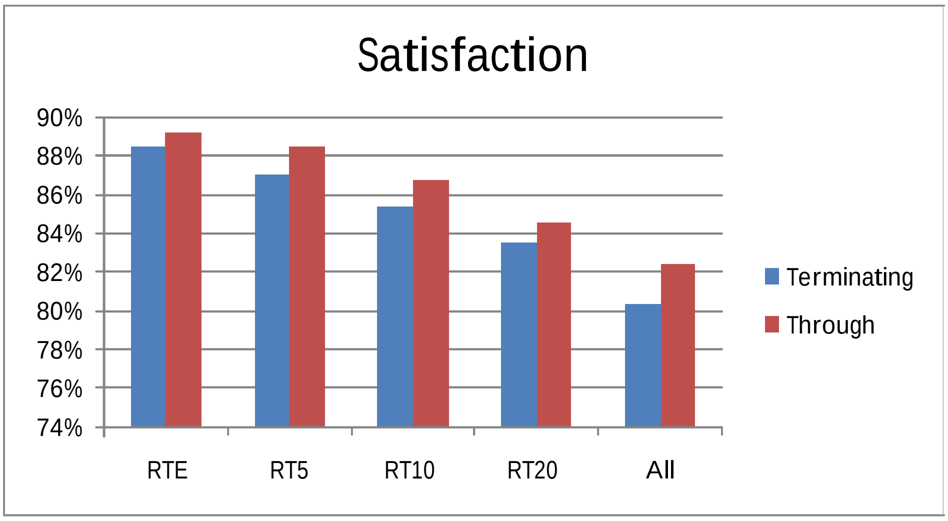
PPM is measured at a trains final destination, rather than punctuality at each station en route. This section looks at the difference between passengers getting off at intermediate (through) stations and passengers leaving the train at the station it terminates at.

The chart below shows the difference in the amount of trains that fall inside each 'right time' classification and split between through and terminating trains. For through trains only 46% are right time or early, but when terminating it is 17% higher at 63%. This difference is much smaller for RT10, where both categories show a value of 87%.

This passengers alighting at intermediate (through) stations suffer a larger number of small delays than those alighting at the terminating station. This is likely to be related to the pathing allowance in most services on the approach to their terminus.



That said, this difference is not reflected in levels of satisfaction. The chart below shows that, throughout all the lateness categories, passengers are noticeably less satisfied when alighting the train at its terminating station than at through stations, and that this difference increases to over 2% difference for trains over 20 minutes late.



This difference occurs without a significant difference in average train lateness with both through and terminating trains very close to the overall average lateness of 5.4 minutes per train. As a large number of the through trains experience only small delay (1 to 5 minutes late), this tends to support the previous finding in tipping points, that passenger satisfaction is not so greatly influenced by short delays.

From this we might speculate that where services are ‘held’ outside stations awaiting platforms etc. that there may be some perception of delay. However, this is conjecture and no direct evidence is available to support this.

9 Halo Effect

Previous studies undertaken by Passenger Focus have shown the importance of punctuality in influencing passenger satisfaction. We have also seen in Section 5, that overall satisfaction tends to fall as lateness increases. This might suggest that satisfaction with other service attributes might change with lateness, and where other attributes fall as lateness increases, this may be described as 'halo effect'.

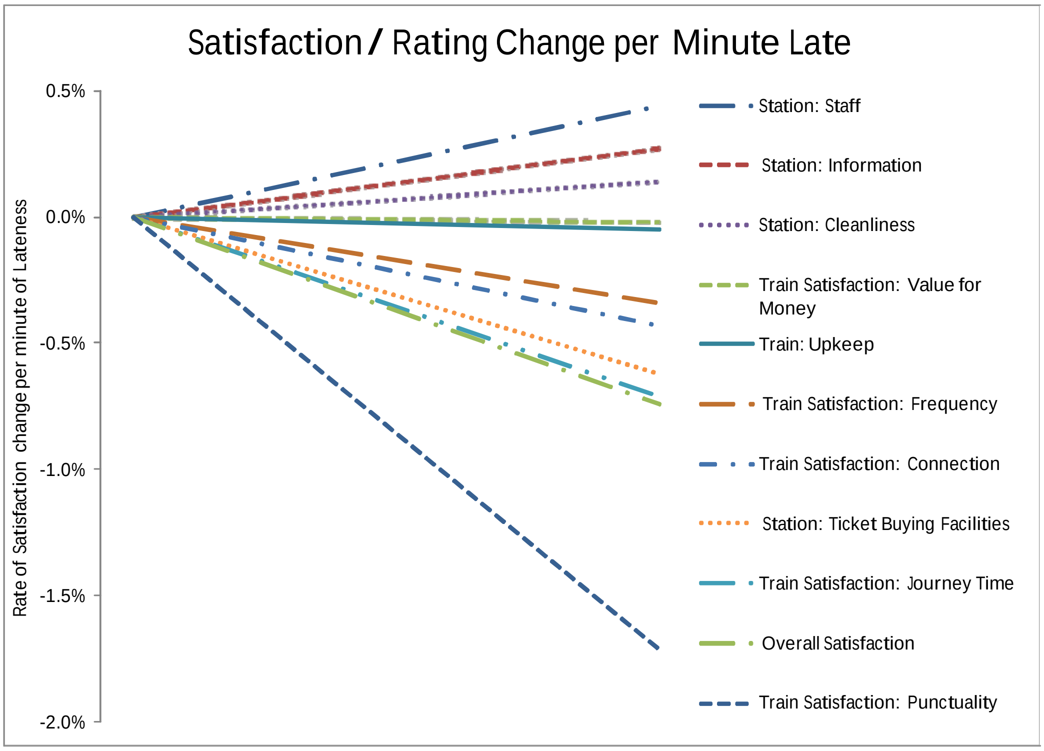
We have firstly examined this by plotting how satisfaction with a range of attributes changes as lateness increases, and showing an average rate of change. The following graph shows that punctuality has the fastest rate of change in satisfaction per additional minute of lateness, and confirms the gradient shown in previous sections. The other measures of satisfaction in the NPS survey change at a much lower rate per minute of lateness, with some not changing at all (i.e. they are not influenced by delay) and some showing an inverse relationship.

Examining the chart we can see that Overall Satisfaction falls by between 0.5% and 1.0% for every minute of lateness. This is also the same for satisfaction with journey time and similar to satisfaction with Station Ticket Buying Facilities. There also appears to be a similar relationship (but a shallower gradient) with satisfaction with connections, and frequency.

There does not appear to be any relationship with train upkeep or value for money.

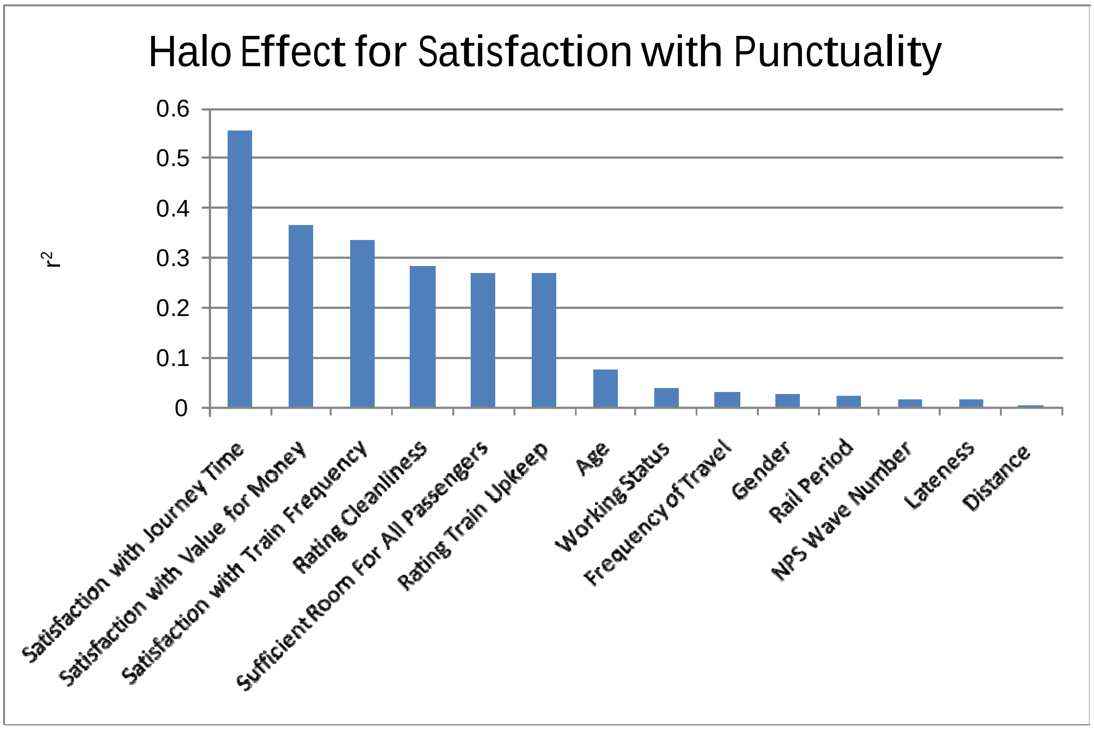
Satisfaction with station staff and station information appears to increase as lateness increases. Whilst at first glance this may be counter-intuitive, it might reflect the increasing need for these service attributes when trains are delayed, and appreciation when staff or information is given once trains are delayed.

This demonstrates that satisfaction with punctuality is the largest influencing factor on overall satisfaction and therefore improving satisfaction with punctuality will improve overall satisfaction.

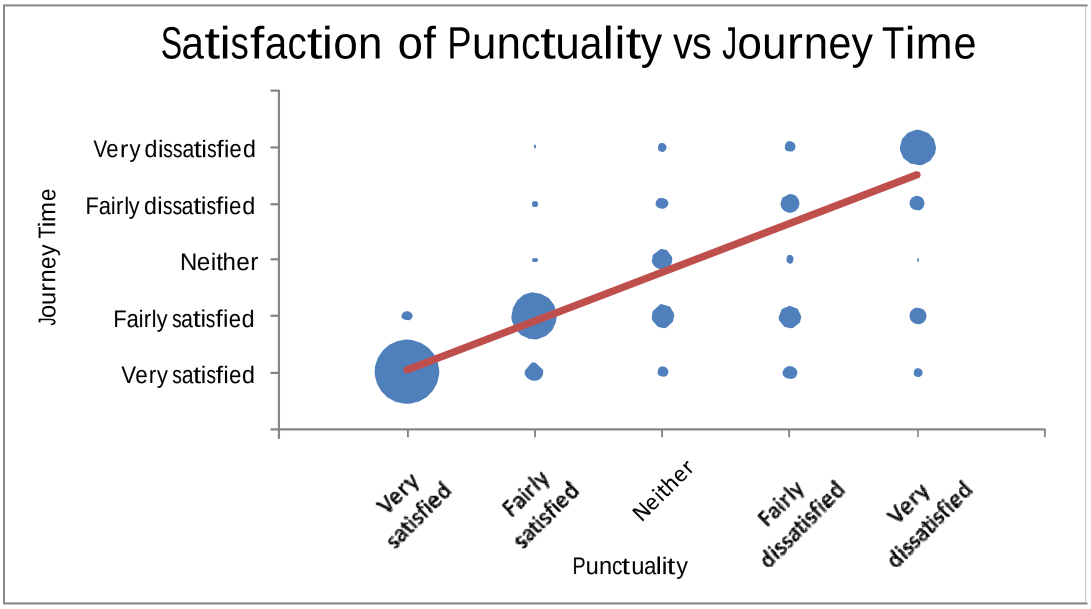


However, the strength of the relationship is not certain from these plots. For a straight forward way to look at this problem a matrix was created to check for correlation between different variables (NPS questionnaire answers). Values closer to 1 or -1 tell us that there is a linear relationship between the variables. Whereas values close to 0 indicate that no linear relationship exists.

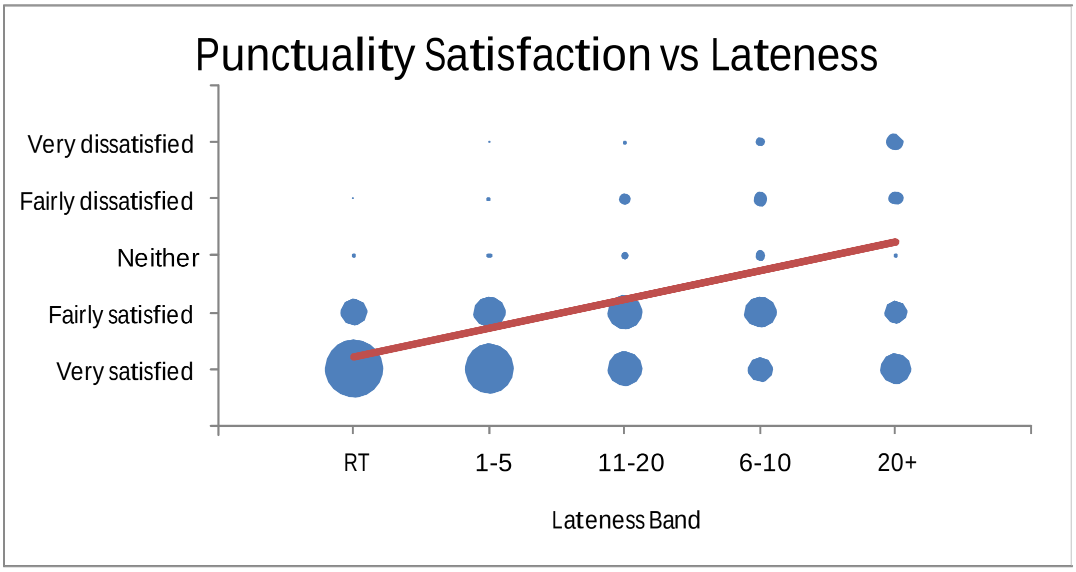
The chart below shows the coefficient of determination (r^2) for the satisfaction with punctuality compared with a selection of other variables used in the analysis. Here it can be seen that there is a connection between satisfaction with punctuality and other subjective measures from the NPS data, suggesting that when punctuality is rated highly the other values are rated higher and when it is rated badly other categories are rated badly. For comparison, we can see that for other (non NPS satisfaction) variables there is no direct linear connection.



Examining this further, the next graph shows two variables where $r^2 = 0.56$ and here we can see that there is an obvious straight line that we can draw through the data that follows the general distribution of the data. The bubbles are larger the more people answered both questions as indicated in the chart and are normalized for each column, so a trend can easily be seen.



The last chart shows the relationship we have focussed most of our research on. Although there is a line drawn through the data, it is far less obvious to decide where to draw the line and the test for linear correlation suggests that there is no line that will properly represent the data. Independent of that there is an obvious distribution to the data, essentially suggesting the later the train arrives the less people are satisfied with punctuality and it is this that most the research has centred on.



10 Conclusions

Our key findings are:

- Satisfaction with punctuality is the largest influencing factor on overall satisfaction, therefore improving satisfaction with punctuality will improve overall satisfaction
- On average, passenger satisfaction with punctuality falls by 2% for every additional minute of lateness (the gradient) and Overall Satisfaction falls by between 0.5% and 1%
- The rate of change at which passenger satisfaction with punctuality varies with lateness is not constant. There appears to be a series of ‘tipping points’ at 2-4, 5-6 and 8-10 minutes of lateness suffered
- Perception of delay varies by frequency of travel and more frequent travellers are generally less satisfied and more sensitive to delay than those who don’t travel as often. This largely explains why commuters and shorter distance travellers appear less satisfied than longer-distance passengers for the same level of delay.
- Not all passengers say they are satisfied with punctuality even when their service arrives on time or early (RTE) (the ‘intercept’). Only 89% of passengers are satisfied (both overall and with punctuality) at RTE, and for frequent travellers this might be influenced by their previous (but recent) experience of delay.
- The overall satisfaction of frequent travellers is driven by satisfaction with punctuality
- Passengers travelling to intermediate (through) stations experience higher levels of small delays than those travelling to stations at which the train terminates. However, this variation is not reflected in passenger satisfaction, where passengers travelling to terminating stations are less satisfied than those travelling to through stations.
- Overall satisfaction, satisfaction with journey time, frequency, connections and ticket buying facilities falls as punctuality falls (lateness increases) and therefore there is a Halo effect associated punctuality for some (but not all) service attributes.

APPENDIX A Detailed NPS to Bugle Matching Methodology

The aim of the process is to establish how late a train was running, when a passenger that filled in an NPS questionnaire, alighted their train. To this end for each NPS entry the corresponding entry in Bugle has to be found to give the punctuality of the train along its route.

Steps:

1) NPS to bugle + direction
2) Establish Ids
3) Direct match ID
4) Time allowance for second ID
5) Establish which match and keep correct Head Code
6) Use unique ID to find lateness
7) Check error catches to make sure everything has run correctly

1) The first step is to make the NPS data compatible with the Bugle data. To this end NPS station names, dates and time are all formatted in the same style as the Bugle data. Additionally to this directionality is added to both NPS and Bugle data so that it is easy to establish if a train is travelling north- or southbound.
2) To easily compare NPS and Bugle data several IDs are created. These consist of combined data from every entry. The exact use is explained further along in the process.
3) The first match is comparing an ID containing date, time, direction, origin station and destination. This will match up any data where the passenger boarded the train at the train's origin station. When a match occurs we record the head code of the train they boarded, this also applies to the further matching attempts.
4) To match up any data where the passenger got on at an intermediate stop we use an ID consisting of date, time, direction and origin station. As the times recorded in Bugle do not necessarily perfectly reflect the timetabled times a leeway of 13 minutes before and 10 minutes after the departure time recorded in the NPS data is allowed to find a match with the Bugle data and find the train that was boarded.
5) As this process makes it possible for multiple matches to be found it is essential consider which are the most appropriate to use going forward in the analysis. So if the first match comes back positive we use that result as we know it is correct. With the secondary match we prioritise earlier than the departure time over later times and the least time difference has the highest priority.
6) Now that we know what train people are travelling on an ID consisting of date, head code and destination is used to retrieve the lateness of the train the NPS passenger was travelling on.
7) Throughout this process error checking ensures that incorrect matches are excluded and no NPS data is matched up to the incorrect entry in bugle.

APPENDIX B Additional Analysis

Satisfaction breakdowns

	Satisfied	Neither	Dissatisfied	Total
Total	81%	10%	9%	9406
Lateness	3.4	6.8	21.1	5.4

Route	Satisfied	Neither	Dissatisfied	Total	Lateness
London <> Commuter Core	80%	10%	11%	1311	3.6
London <> North East	84%	8%	8%	1432	5.8
London <> North Yorks	82%	9%	9%	1141	6.0
London <> Scotland	85%	8%	7%	756	7.2
London <> South & East Yorks	83%	10%	7%	507	6.1
London <> West Yorks	83%	10%	7%	1273	4.3
Northern flows	78%	11%	11%	1817	6.0
Other flows	80%	11%	9%	1169	5.0
Grand Total	**81%**	**10%**	**9%**	**9406**	**5.4**

Purpose	Satisfied	Neither	Dissatisfied	Total	Lateness
Commute	75%	12%	13%	1465	5.4
Business	82%	9%	9%	2952	4.8
Leisure	83%	9%	8%	4989	5.7
Grand Total	**81%**	**10%**	**9%**	**9406**	**5.4**

	Satisfied		Lateness	
Route	Northbound	Southbound	Northbound	Southbound
London <> Commuter Core	84%	75%	2.4	4.9
London <> North East	87%	78%	5.2	6.8
London <> North Yorks	86%	78%	4.6	7.3
London <> Scotland	85%	84%	6.9	7.8
London <> South & East Yorks	87%	79%	8.0	4.0
London <> West Yorks	83%	83%	4.0	5.0
Northern flows	74%	82%	7.2	4.6
Other flows	83%	78%	4.1	5.8
Grand Total	**83%**	**79%**	5.1	5.7

	Satisfied		Lateness	
Purpose	Northbound	Southbound	Northbound	Southbound
Business	84%	80%	4.3	5.5
Commute	77%	73%	5.5	5.3
Leisure	84%	81%	5.5	5.9
Grand Total	**83%**	**79%**	**5.1**	**5.7**

Reason for leisure trip	Travellers	Satisfaction	Lateness
A day out	6%	81%	5.3
On personal business	9%	83%	5.2
Other leisure trip	13%	86%	5.5
Shopping trip	3%	82%	5.2
Sport	2%	84%	4.9
Travel to/from holiday	18%	84%	6.7
Visiting friends or relatives	48%	82%	5.6
Grand Total	**4989**	**83%**	**5.7**

Frequency of travel	Travellers	Satisfied	Lateness
3 or more times a week	6%	69%	4.5
Once or twice a week	8%	78%	5.2
1 or 2 times a month	18%	81%	5.6
Once every 2-3 months	21%	83%	5.1
Once every 6 months	12%	84%	6.0
Less often	18%	84%	5.3
Never/First time today	16%	82%	5.4
Don't know/no answer	1%	69%	5.7
Grand Total	**9406**	**81%**	**5.4**

Demographics

Age Group	Travellers	Satisfied	Lateness
16-25	9%	80%	4.9
26-34	12%	80%	4.7
35-44	19%	81%	5.7
45-54	25%	82%	5.2
55-59	12%	82%	6.1
60-64	11%	83%	5.4
65+	11%	84%	5.1
Not stated	1%	70%	8.2
Grand Total	**9406**	**81%**	**5.4**

Gender	Travellers	Satisfied	Lateness
Female	53%	83%	5.1
Male	45%	80%	5.6
Not stated	2%	71%	7.0
Grand Total	**9406**	**81%**	**5.4**

Satisfaction with Punctuality by Demographics

Older people are most satisfied with punctuality and satisfaction falls with age although there is only a 4% difference over the whole range of those who stated their age. The younger age groups suffer the least amount of lateness and are least satisfied.

Age Group	Travellers	Satisfied	Lateness
65+	11%	84%	5.1
60-64	11%	83%	5.4
55-59	12%	82%	6.1
45-54	25%	82%	5.2
35-44	19%	81%	5.7
26-34	12%	80%	4.7
16-25	9%	80%	4.9
Not stated	1%	70%	8.2
Grand Total	**9406**	**81%**	**5.4**

However, this difference might be explained by the fact that younger people travel more frequently than older passengers (and not that they experience higher levels of delay).

Proportion of Frequent & Infrequent travellers by age group (note: excludes first time travellers)	Under 45	45 or Over	Total
Frequent (once per week or more)	52%	48%	100%
Infrequent (less than once per week)	38%	62%	100%
Average Lateness (for comparison)	5.2	5.4	5.4

Weekdays

	Weekday				Saturday	Sunday	
Purpose	AM Peak	Day Off Peak	PM Peak	Evening Off Peak	Off Peak	Off Peak	**Total**
Commute	28%	9%	23%	19%	3%	6%	**16%**
Business	45%	27%	45%	27%	6%	9%	**31%**
Leisure	27%	64%	32%	54%	91%	85%	**53%**
Total	2062	3358	1918	509	830	729	**9406**

	Weekday				Saturday	Sunday	
Satisfaction	AM Peak	Day Off Peak	PM Peak	Evening Off Peak	Off Peak	Off Peak	**Total**
Satisfied	80%	83%	80%	78%	84%	80%	**81%**
Neither	10%	9%	10%	10%	10%	9%	**10%**
Dissatisfied	10%	8%	10%	12%	7%	11%	**9%**
Average of Lateness	5.4	5.5	5.4	6.7	3.3	6.1	**5.4**

Satisfaction	Weekday	Saturday	Sunday	Total
Satisfied	81%	84%	80%	81%
Neither	10%	10%	9%	10%
Dissatisfied	9%	7%	11%	9%
Average of Lateness	5.5	3.3	6.1	5.4
Total	**7847**	**830**	**729**	**9406**

Ranking

The Stations below are ranked in descending order with the highest satisfaction percentage at the top.

Destination Station	Satisfied	Neither	Dissatisfied	Total	Lateness
DARLINGTON	86%	6%	8%	343	4.8
DURHAM	86%	9%	6%	245	4.9
YORK	84%	8%	8%	961	5.0
NEWCASTLE	84%	9%	7%	815	5.4
GRANTHAM	84%	9%	7%	237	2.5
WAKEFIELD WESTGATE	84%	12%	5%	225	5.8
DONCASTER	83%	10%	7%	510	6.2
LEEDS	83%	9%	9%	902	3.1
NORTHALLERTON	83%	15%	3%	40	1.4
PETERBOROUGH	82%	9%	9%	584	4.4
EDINBURGH	81%	10%	8%	740	6.6
RETFORD	80%	12%	7%	82	2.4
NEWARK NORTH GATE	80%	10%	10%	315	3.1
BERWICK-UPON-TWEED	80%	11%	9%	105	12.4
INVERNESS	80%	14%	6%	50	4.9
HAYMARKET	79%	17%	3%	29	5.7
DUNDEE	79%	2%	19%	43	9.2
LONDON KINGS CROSS	79%	10%	12%	2591	6.0
GLASGOW CENTRAL	78%	11%	10%	134	6.3
ABERDEEN	78%	8%	14%	76	12.5
STEVENAGE	77%	12%	11%	108	7.6
MOTHERWELL	74%	11%	15%	47	4.7
PERTH	72%	20%	8%	25	4.9
ALNMOUTH	59%	30%	11%	27	6.2

The Stations below are ranked by how often they are either the journeys origin or destination.

Station	Usage	% of Journeys
LONDON KINGS CROSS	6665	68%
YORK	1944	20%
NEWCASTLE	1732	18%
EDINBURGH	1541	16%
LEEDS	1338	14%
DONCASTER	1064	11%
PETERBOROUGH	1043	11%
NEWARK NORTH GATE	679	7%
GRANTHAM	648	7%
DARLINGTON	608	6%

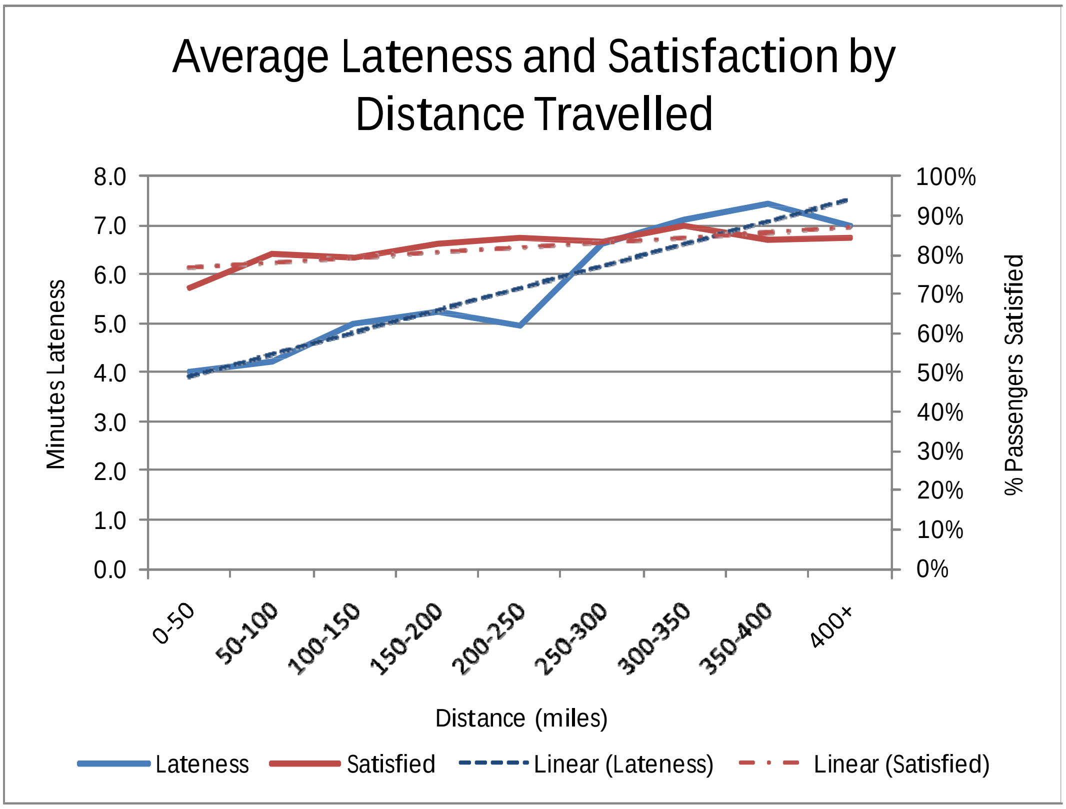
Below it can be seen how the flows are ranked, split by journey purpose

Business	Commute	Leisure	All
London <> West Yorks	Northern flows	Northern flows	Northern flows
London <> North East	London <> Commuter Core	London <> North East	London <> North East
London <> North Yorks	Other flows	Other flows	London <> Commuter Core
London <> Commuter Core	London <> North East	London <> West Yorks	London <> West Yorks
Northern flows	London <> North Yorks	London <> Scotland	Other flows
Other flows	London <> West Yorks	London <> North Yorks	London <> North Yorks
London <> South & East Yorks	London <> South & East Yorks	London <> Commuter Core	London <> Scotland
London <> Scotland	London <> Scotland	London <> South & East Yorks	London <> South & East Yorks

Distance

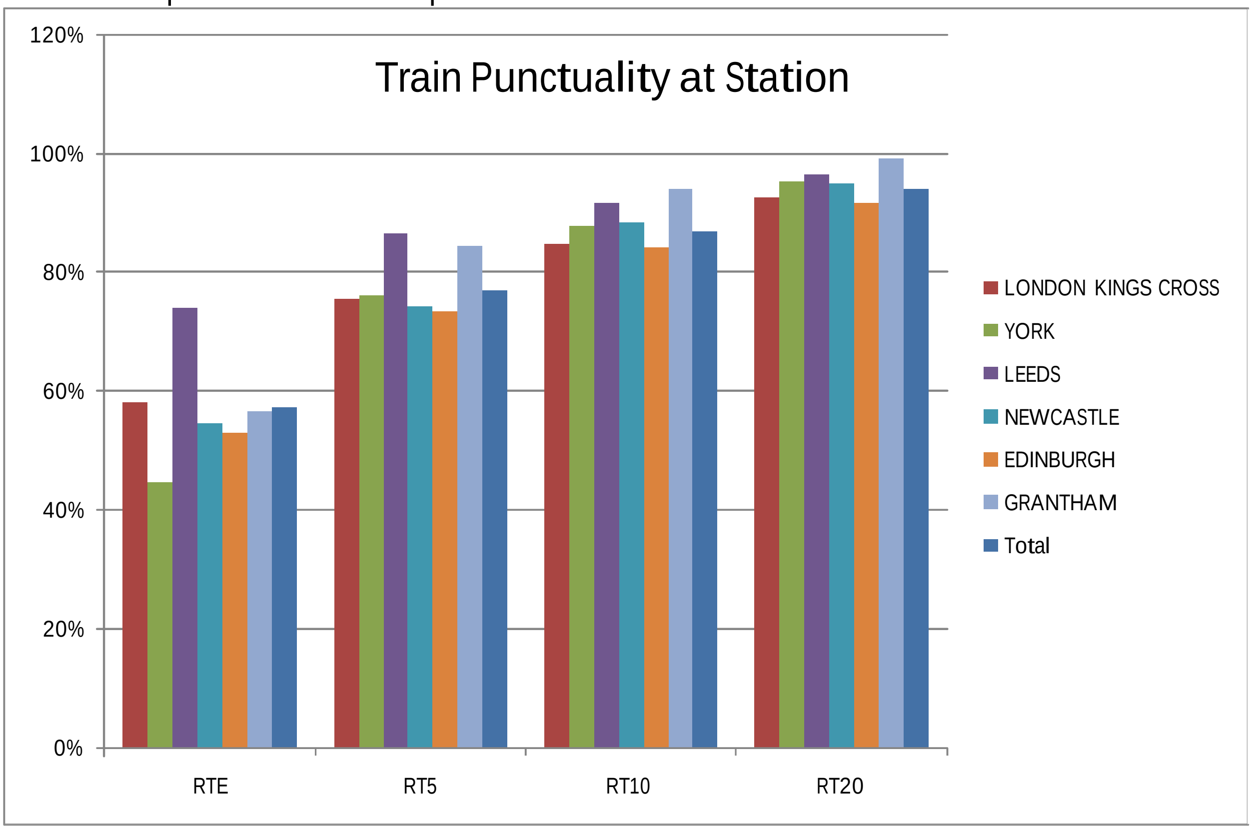
	Lateness	Distance
London <> Commuter Core	3.6	101.9
London <> North East	5.8	256.9
London <> North Yorks	6.0	189.8
London <> Scotland	7.2	409.2
London <> South & East Yorks	6.1	159.6
London <> West Yorks	4.3	183.8
Northern flows	6.0	116.8
Other flows	5.0	138.6
Total	**5.4**	**182.5**

Distance	Lateness	Satisfied	Neither	Dissatisfied	Travellers
0-50	4.0	72%	14%	14%	745
50-100	4.2	80%	10%	10%	978
100-150	5.0	79%	10%	11%	1593
150-200	5.3	83%	9%	8%	3235
200-250	4.9	84%	9%	7%	735
250-300	6.6	83%	8%	8%	1182
300-350	7.1	87%	9%	4%	166
350-400	7.4	84%	8%	8%	565
400+	7.0	85%	8%	8%	207
Total	**5.4**	**81%**	**10%**	**9%**	**9406**

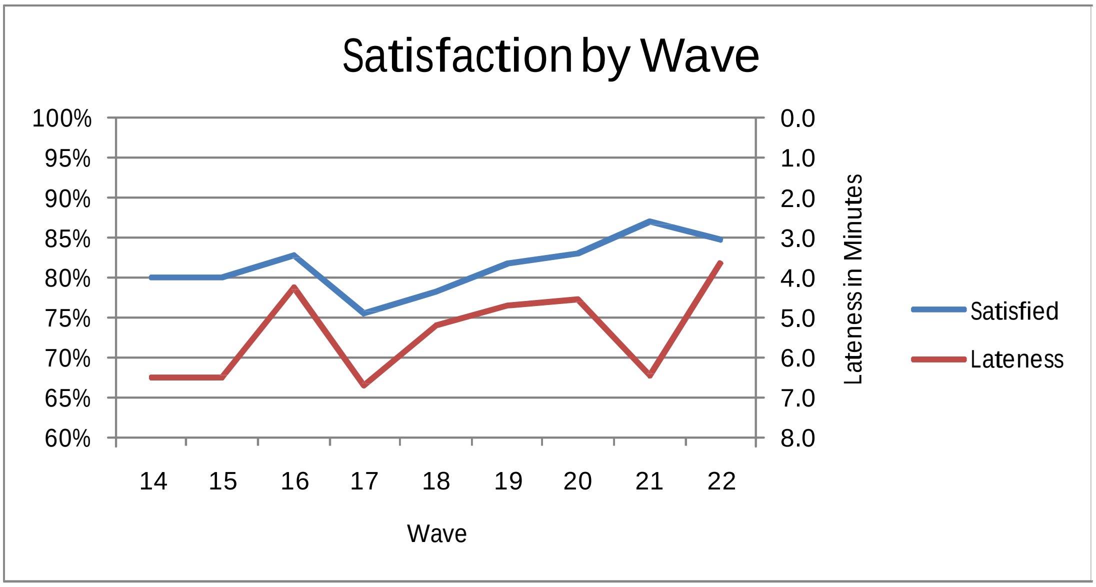


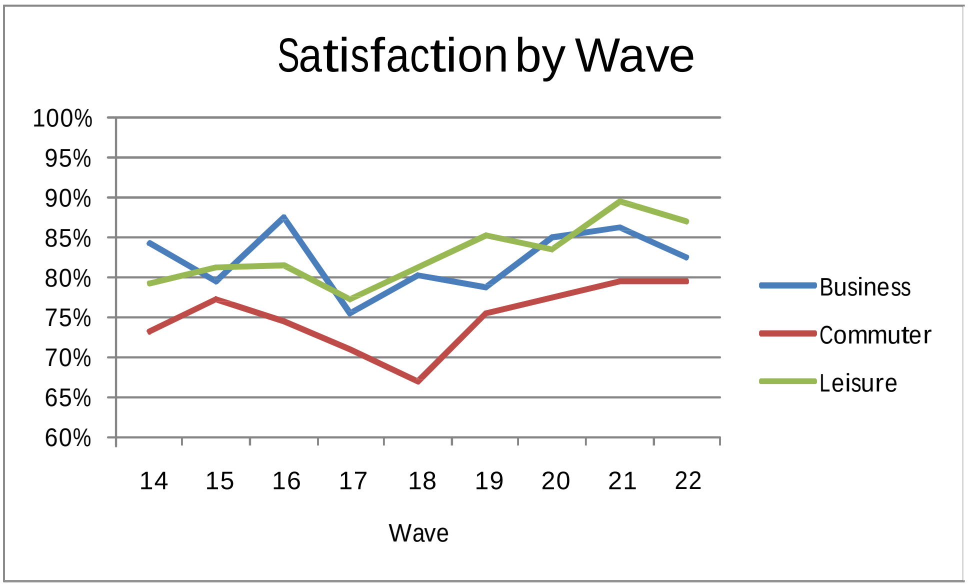
Punctuality

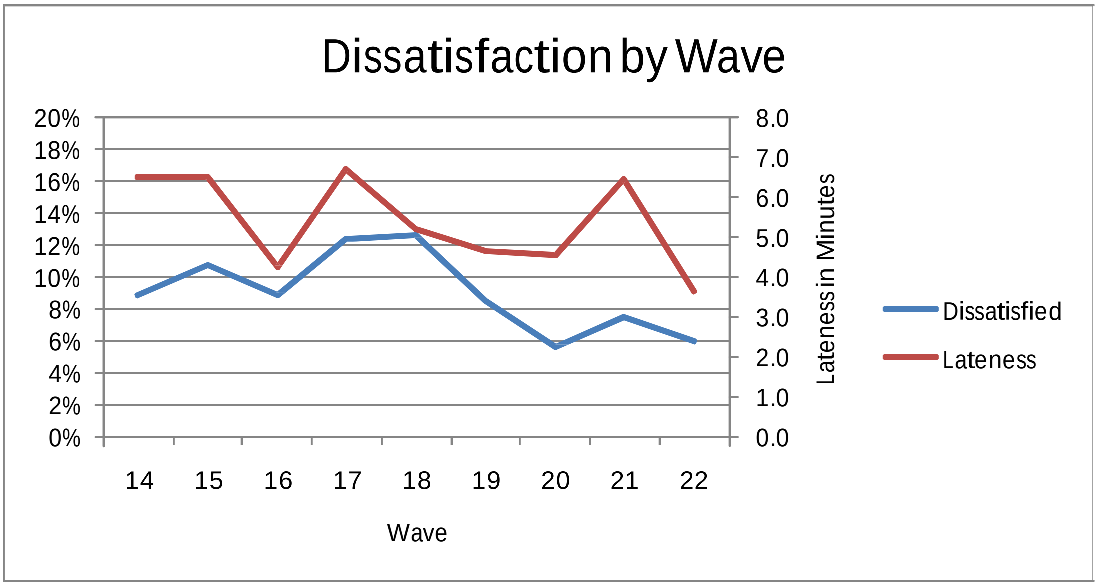
Below is a representation of how punctual the trains are for a selection of busier stations.



Satisfaction by Wave

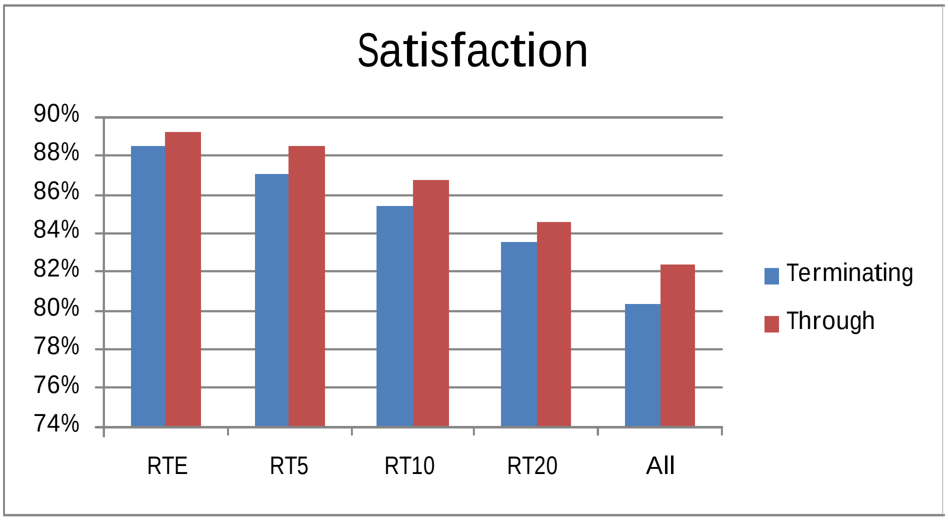


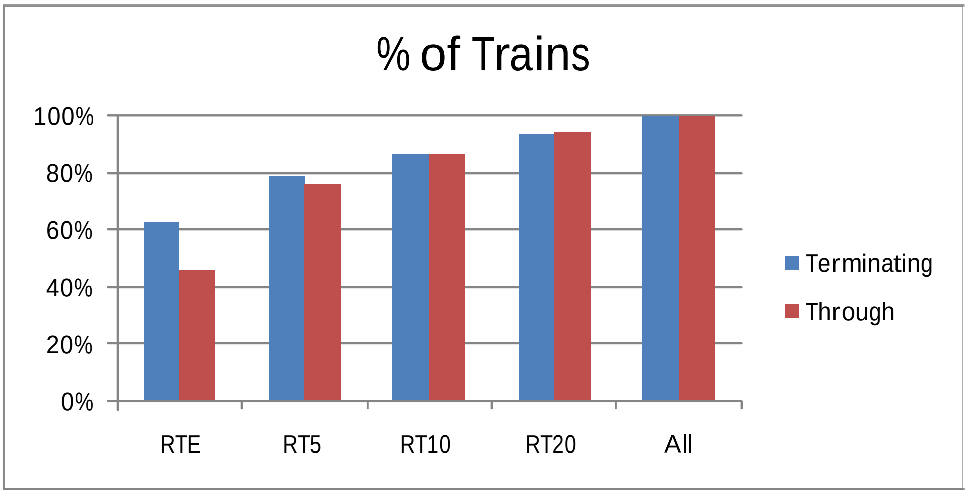




Terminating vs. Through

		Average Lateness		
Lateness	% Satiesfied	Satisfied	Not Satisfied	Total
Train Terminates	80%	0.03	12.70	2.53
Through Train	82%	2.92	12.65	4.63
Total	81%	1.58	12.67	3.64





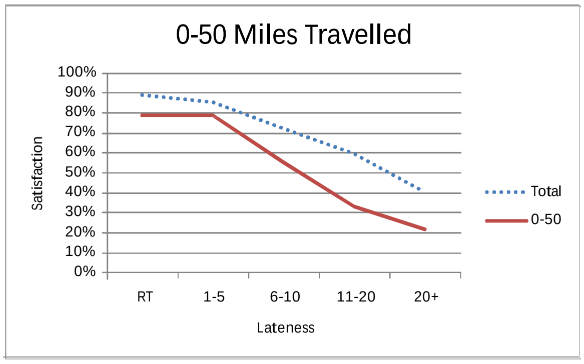
The table below shows the differences for passengers alighting at Doncaster from trains heading Northwest, North or South.

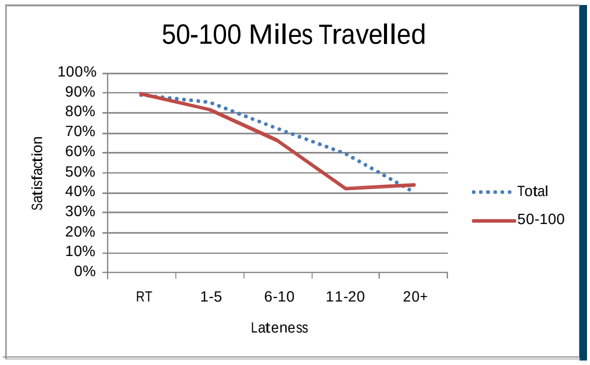
Train routes for passengers alighting at Doncaster		
Route	Average Lateness	% Satisfied
North	4.34	88%
Northwest	8.25	83%
South	3.92	79%

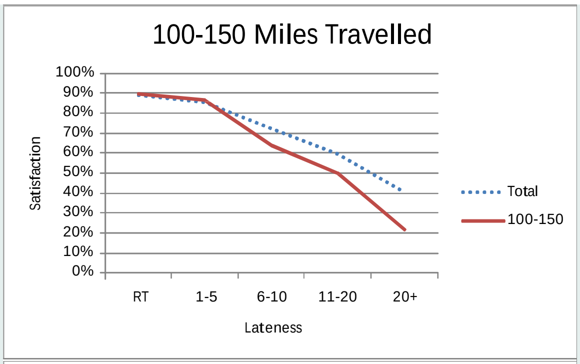
Satisfaction vs. Lateness Charts

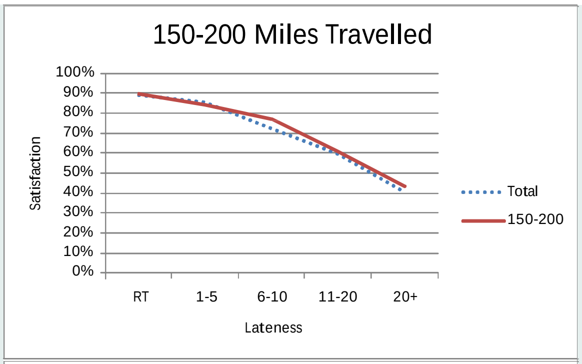
In this section the charts show how passenger satisfaction behaves with increasing lateness for a selection of different splits.

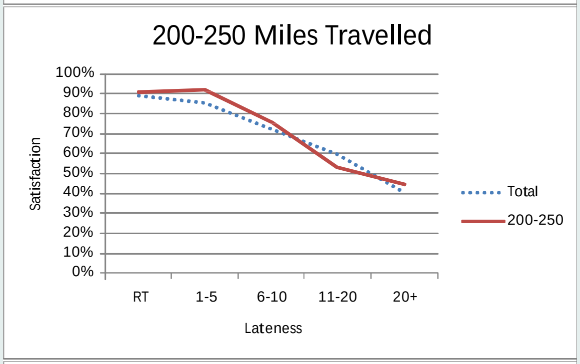
Distance

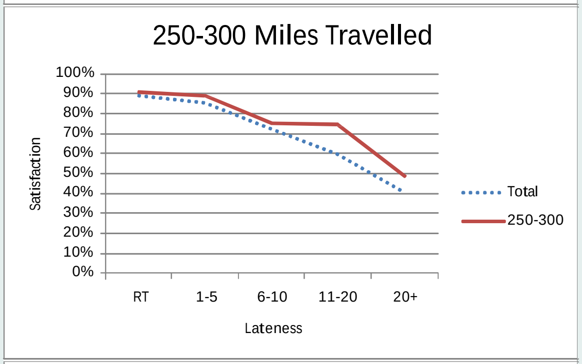


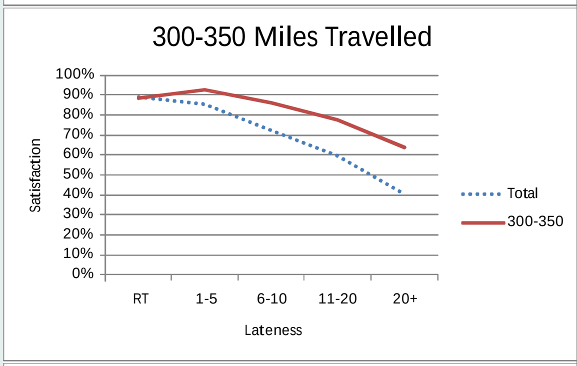


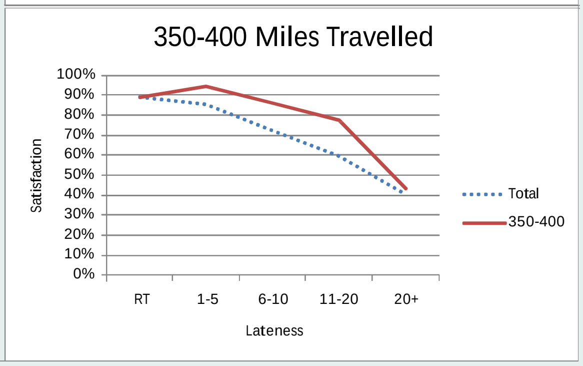

100-150 Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
100-150

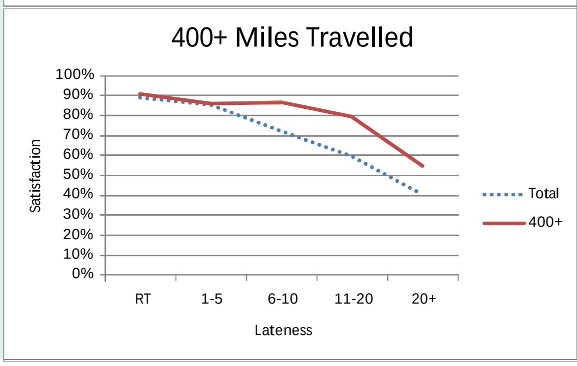

150-200 Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
150-200


200-250 Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
200-250

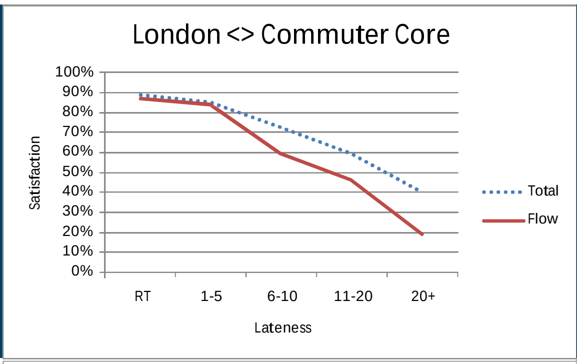

250-300 Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
250-300

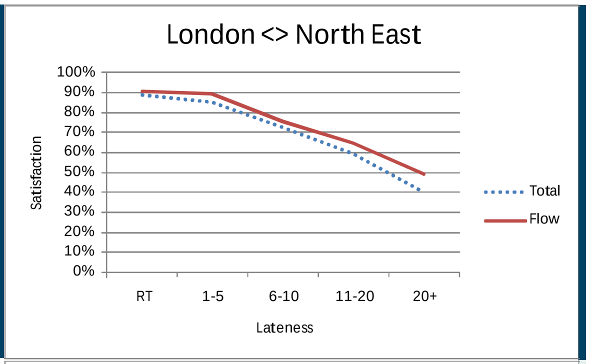

300-350 Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
300-350

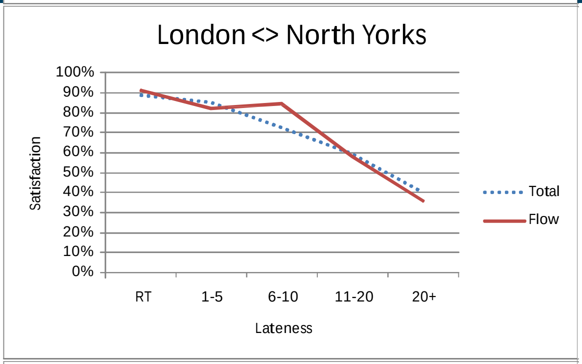

350-400 Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
350-400

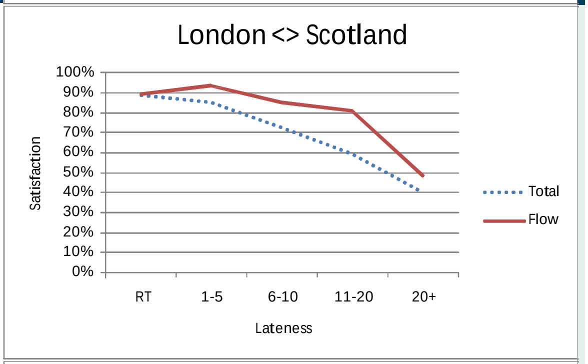

400+ Miles Travelled
Satisfaction
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
RT
1-5
6-10
11-20
20+
Lateness
Total
400+

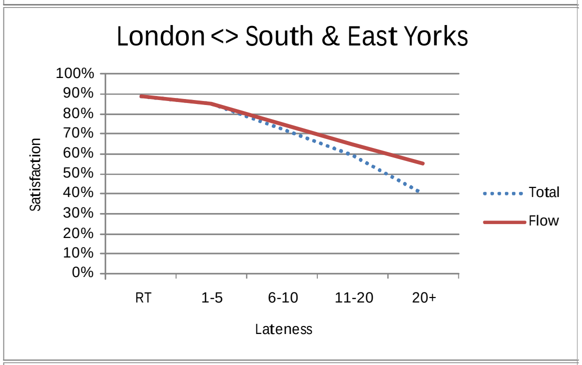
Flow

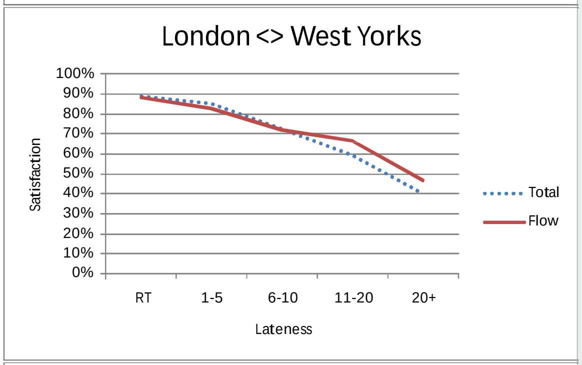

London <> Commuter Core
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

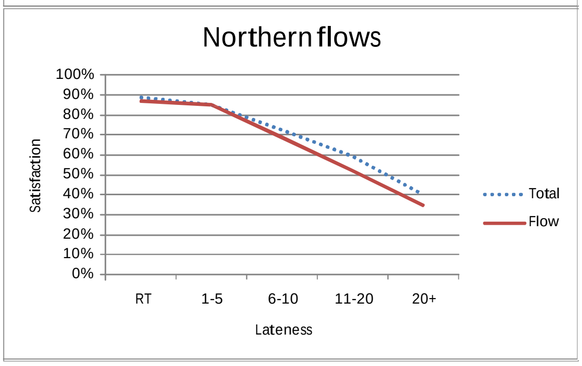

London <> North East
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

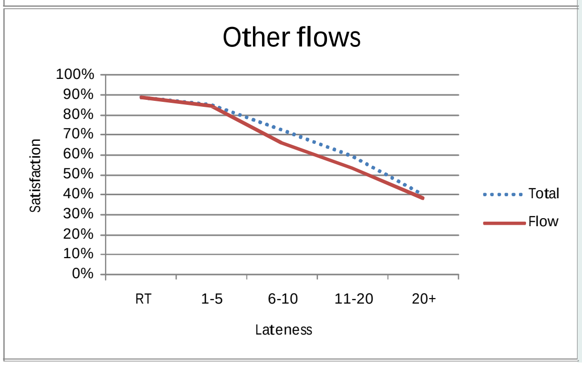

London <> North Yorks
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow


London <> Scotland
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

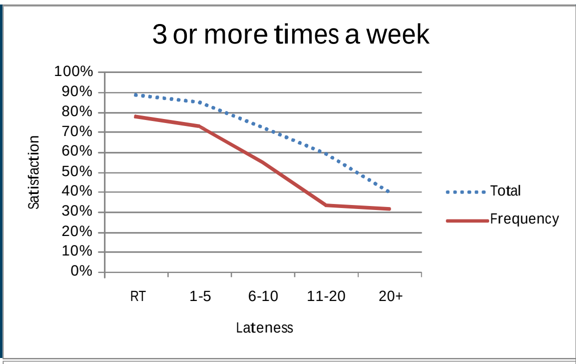

London <> South & East Yorks
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

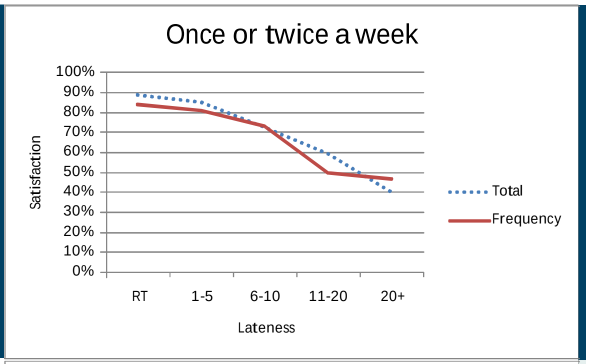

London <> West Yorks
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

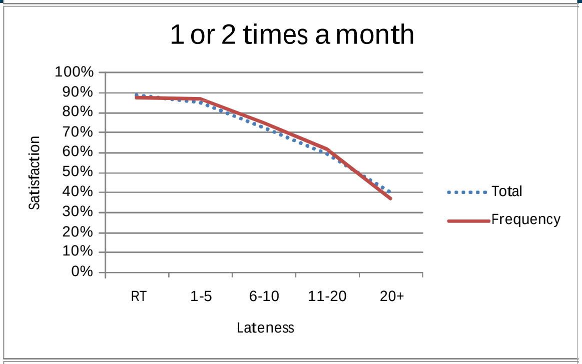

Northern flows
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

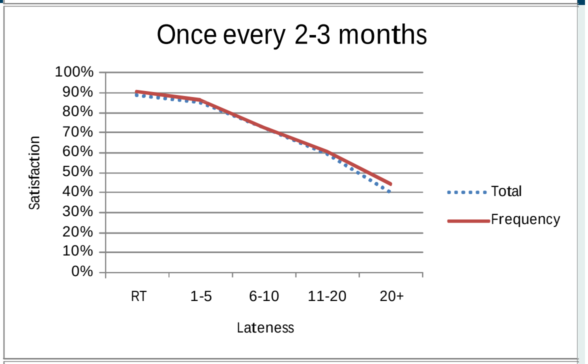

Other flows
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Flow

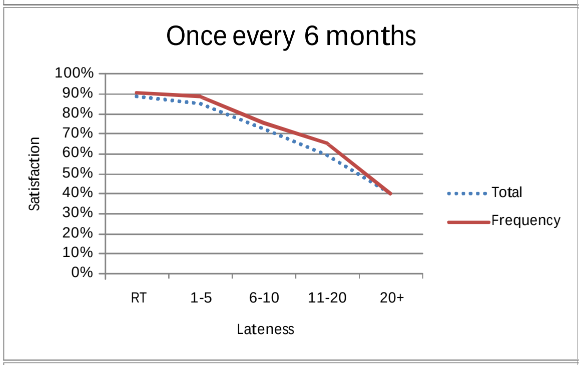
Frequency

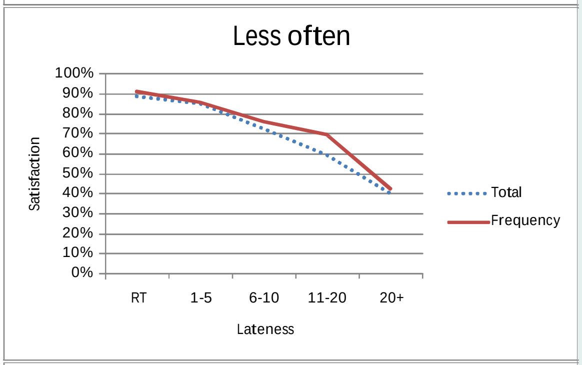

3 or more times a week
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

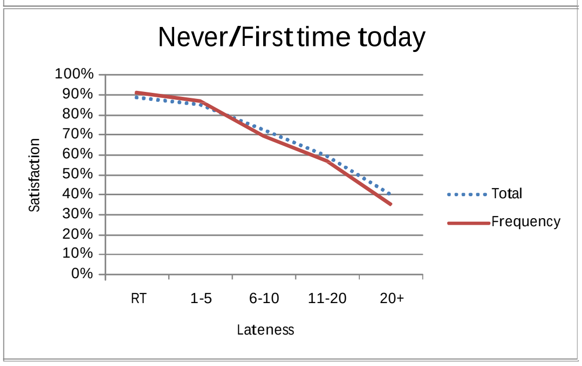

Once or twice a week
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

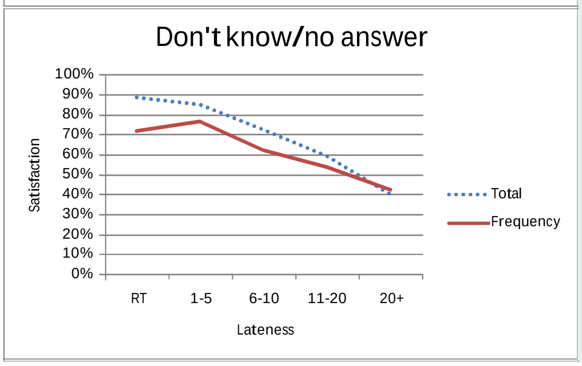

1 or 2 times a month
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency


Once every 2-3 months
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

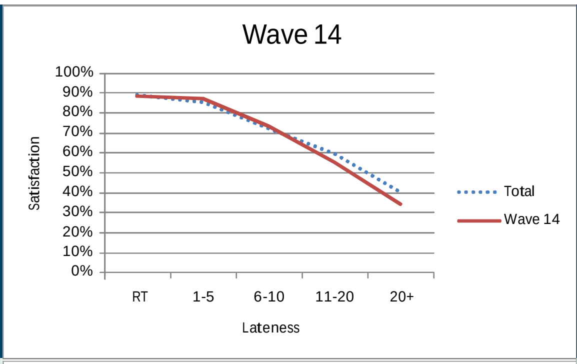

Once every 6 months
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

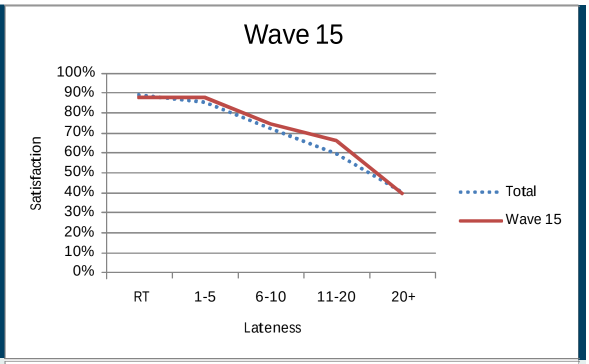

Less often
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

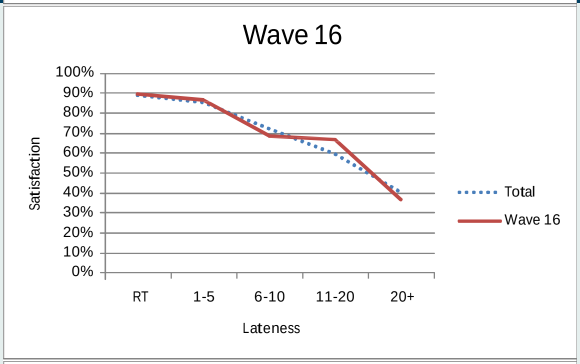

Never/First time today
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

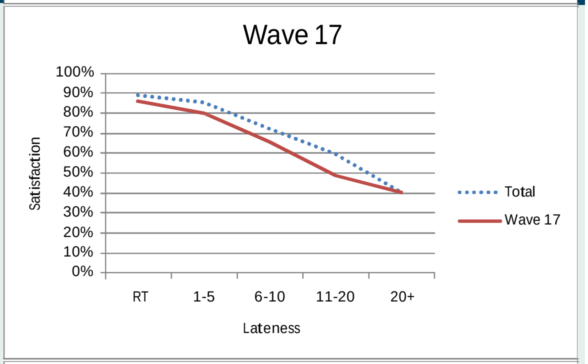

Don't know/no answer
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Frequency

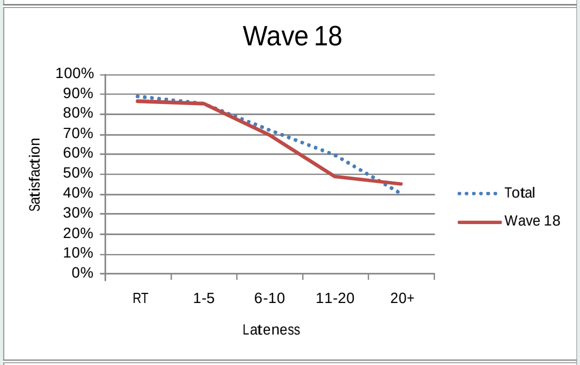
NPS Wave

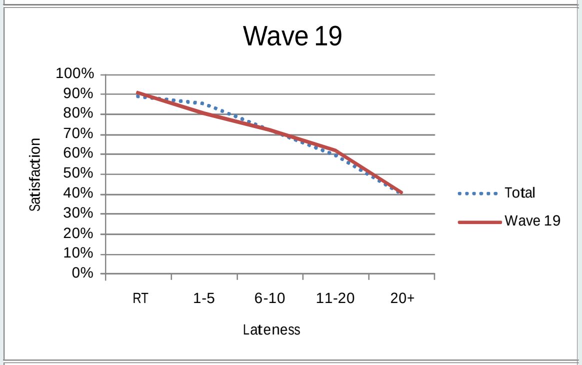

Wave 14
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 14

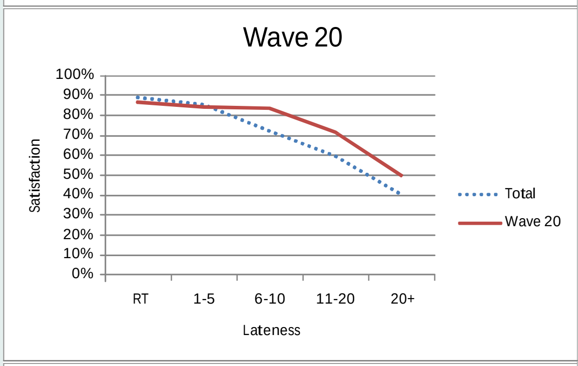

Wave 15
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 15

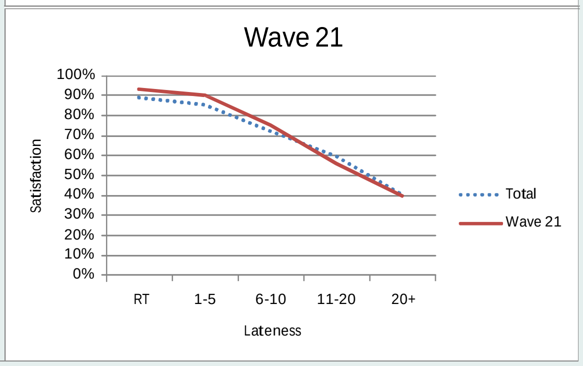

Wave 16
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 16

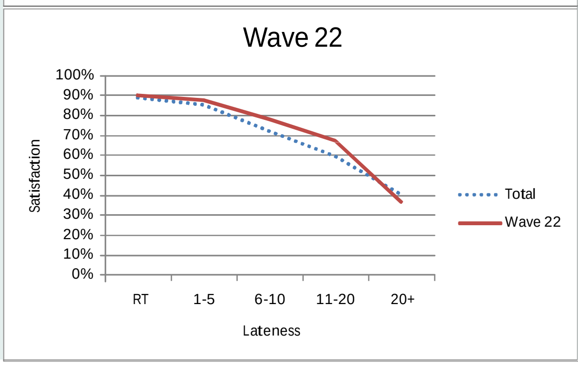

Wave 17
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 17


Wave 18
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 18

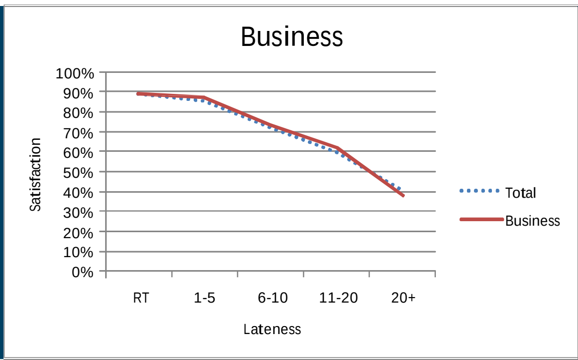

Wave 19
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 19

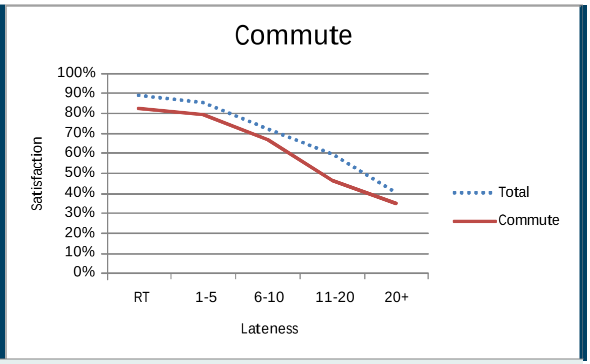

Wave 20
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 20

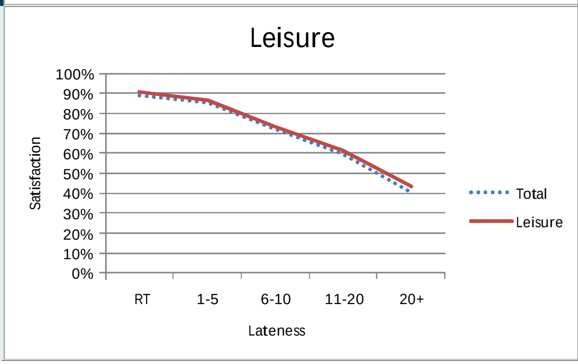

Wave 21
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 21


Wave 22
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Satisfaction
RT
1-5
6-10
11-20
20+
Lateness
Total
Wave 22

Journey Purpose

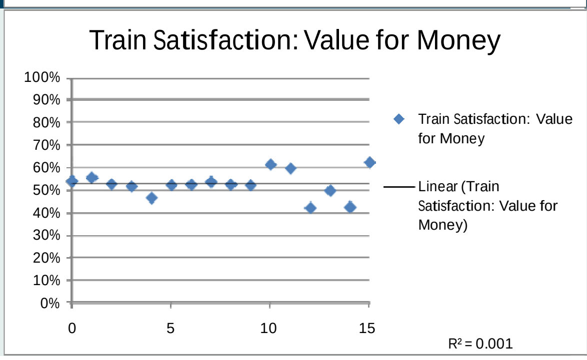


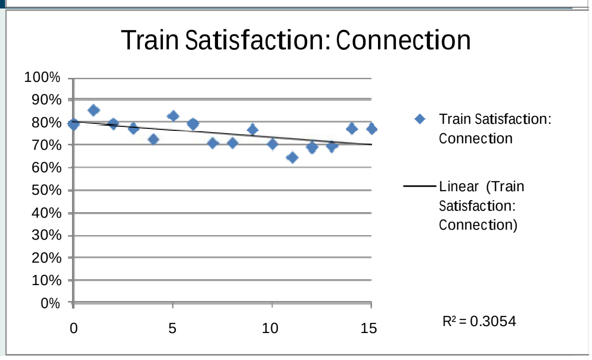


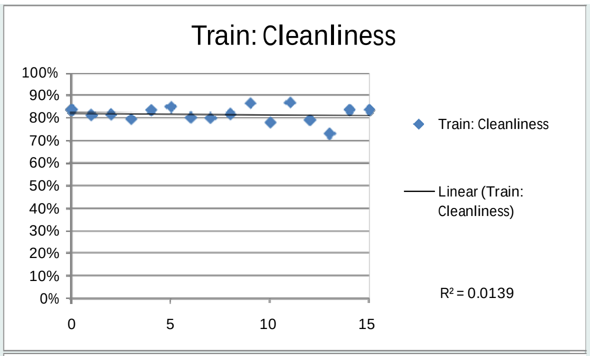


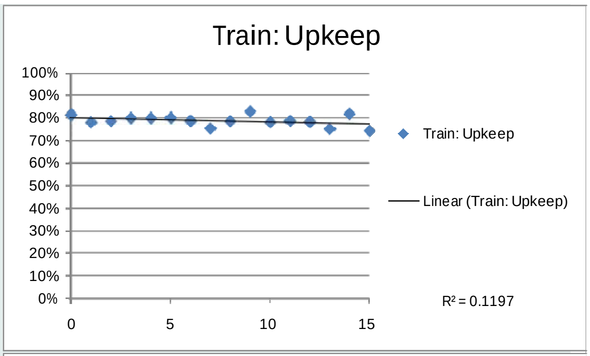
Various Satisfactions and Ratings

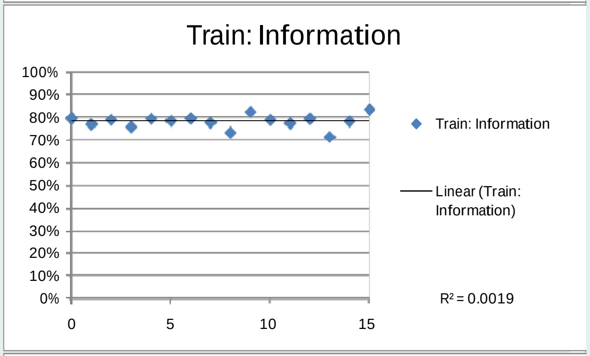
The charts below show the percentage of people that answered “satisfied” or “good” out of the total amount of people rating the corresponding category. This excludes people not answering the question, having no opinion or that did not use the services/facilities.

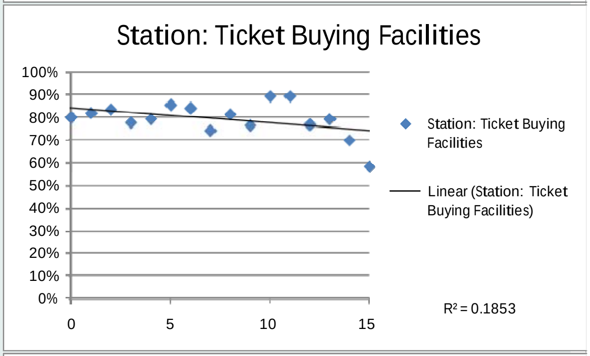


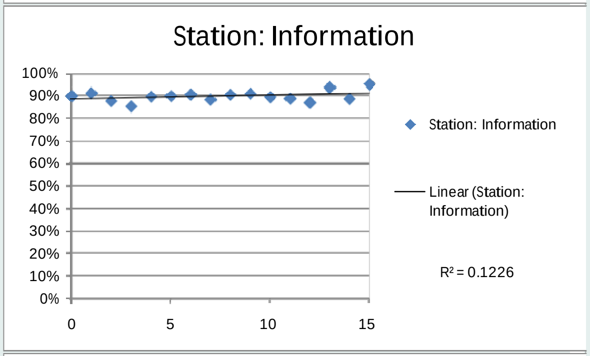


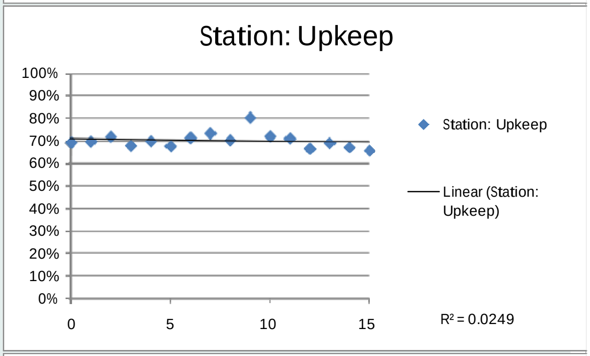

Train: Cleanliness
Train: Cleanliness
Linear (Train: Cleanliness)
R² = 0.0139

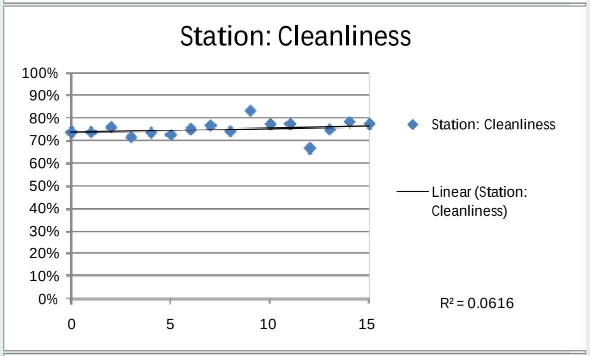

Train: Upkeep
Train: Upkeep
Linear (Train: Upkeep)
R² = 0.1197

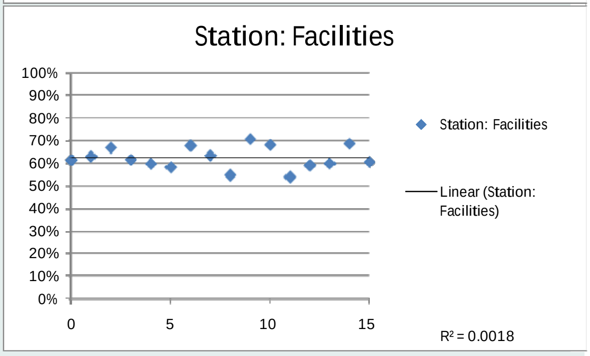

Train: Information
Train: Information
Linear (Train: Information)
R² = 0.0019

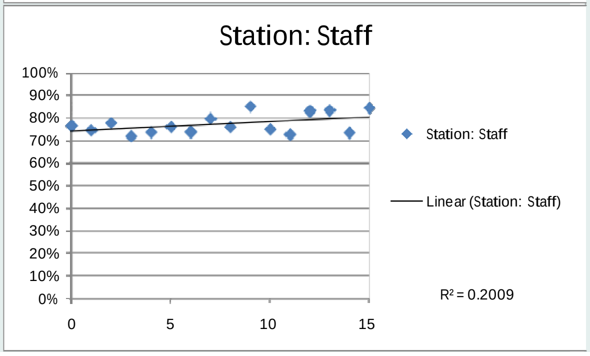

Station: Ticket Buying Facilities
Station: Ticket Buying Facilities
Linear (Station: Ticket Buying Facilities)
R² = 0.1853


Station: Information
Station: Information
Linear (Station: Information)
R² = 0.1226


Station: Upkeep
Station: Upkeep
Linear (Station: Upkeep)
R² = 0.0249


Station: Cleanliness
Station: Cleanliness
Linear (Station: Cleanliness)
R² = 0.0616


Station: Facilities
Station: Facilities
Linear (Station: Facilities)
R² = 0.0018


Station: Staff
Station: Staff
Linear (Station: Staff)
R² = 0.2009

Passengerfocus
putting passengers first

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Passenger Focus is the operating name of the Passengers' Council