



NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

TOC REPORT FOR HEATHROW EXPRESS

Contacts

David Greeno
Passenger Focus
1 Drummond Gate
London, SW1V 2QQ

Tel: 0300 123 0837
Email: david.greeno@passengerfocus.org.uk

David Chilvers
BDRC Continental
Kingsbourne House
229-231 High Holborn
London WC1V 7DA

Tel: 020 7490 9111
Email: dave.chilvers@bdrccontinental.com

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

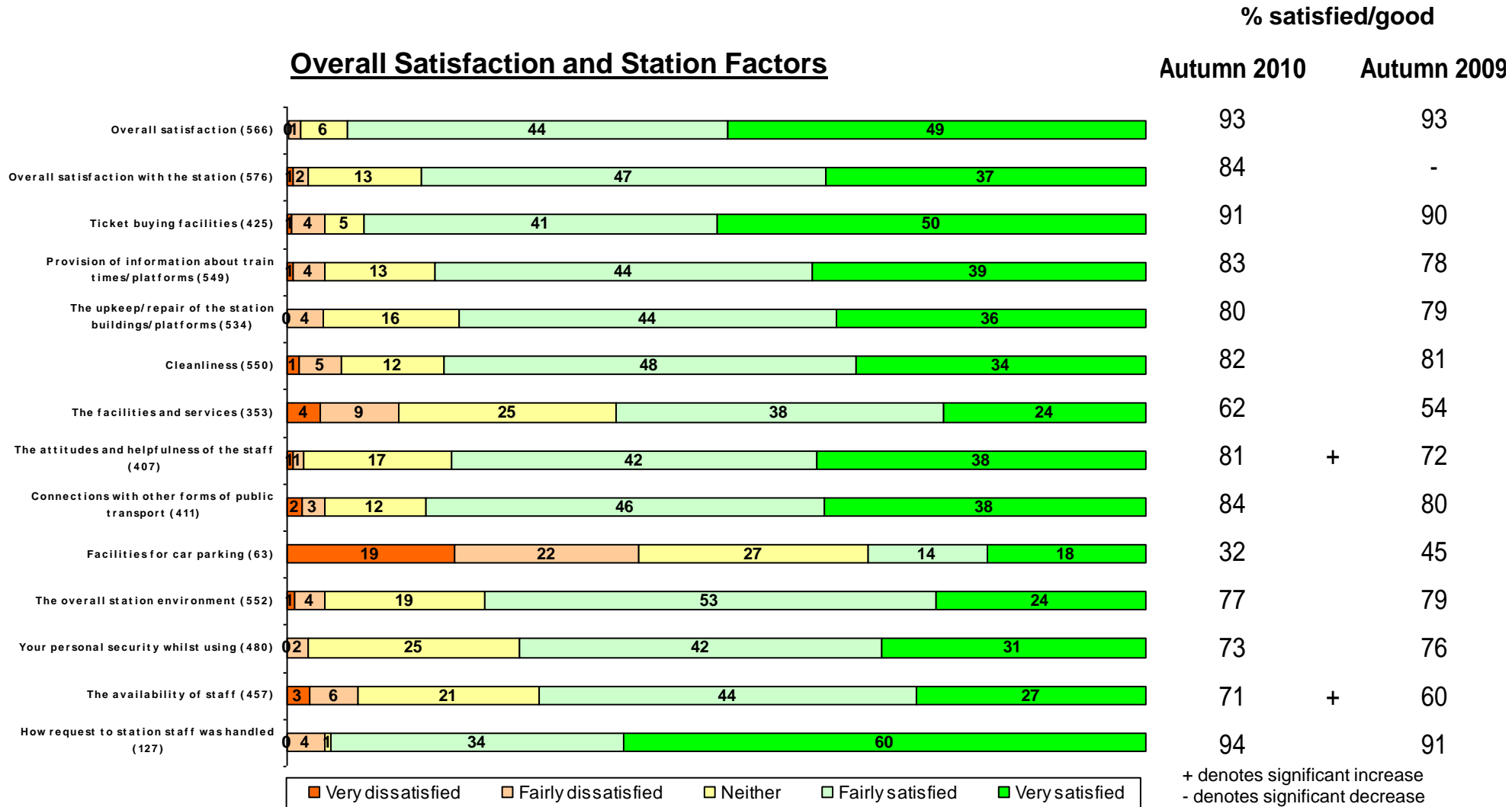
TOC REPORT FOR HEATHROW EXPRESS

Contents	Page No
Overall Satisfaction and Station Factors for TOC	2
Train Factors for TOC	3-4
Overall Satisfaction and Station Factors for TOC type	5
Train Factors for TOC type	6-7
Station Factors - TOC versus TOC type performance	8
Train Factors - TOC versus TOC type performance	9-10
Station Factors - Managed versus Non-Managed	11
Network Rail Categorisation - Managed versus Non-Managed	12
Trends in all 32 Satisfaction Factors for TOC	13-20
Methodology	21
Issues affecting fieldwork	22-25
Sample profile for TOC and TOC type	26-27
Stations sampled - unweighted	28
Sample profile for all TOCs - weighted	29
Sample profile for all TOCs - unweighted	30
NPS reports produced each wave	31

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

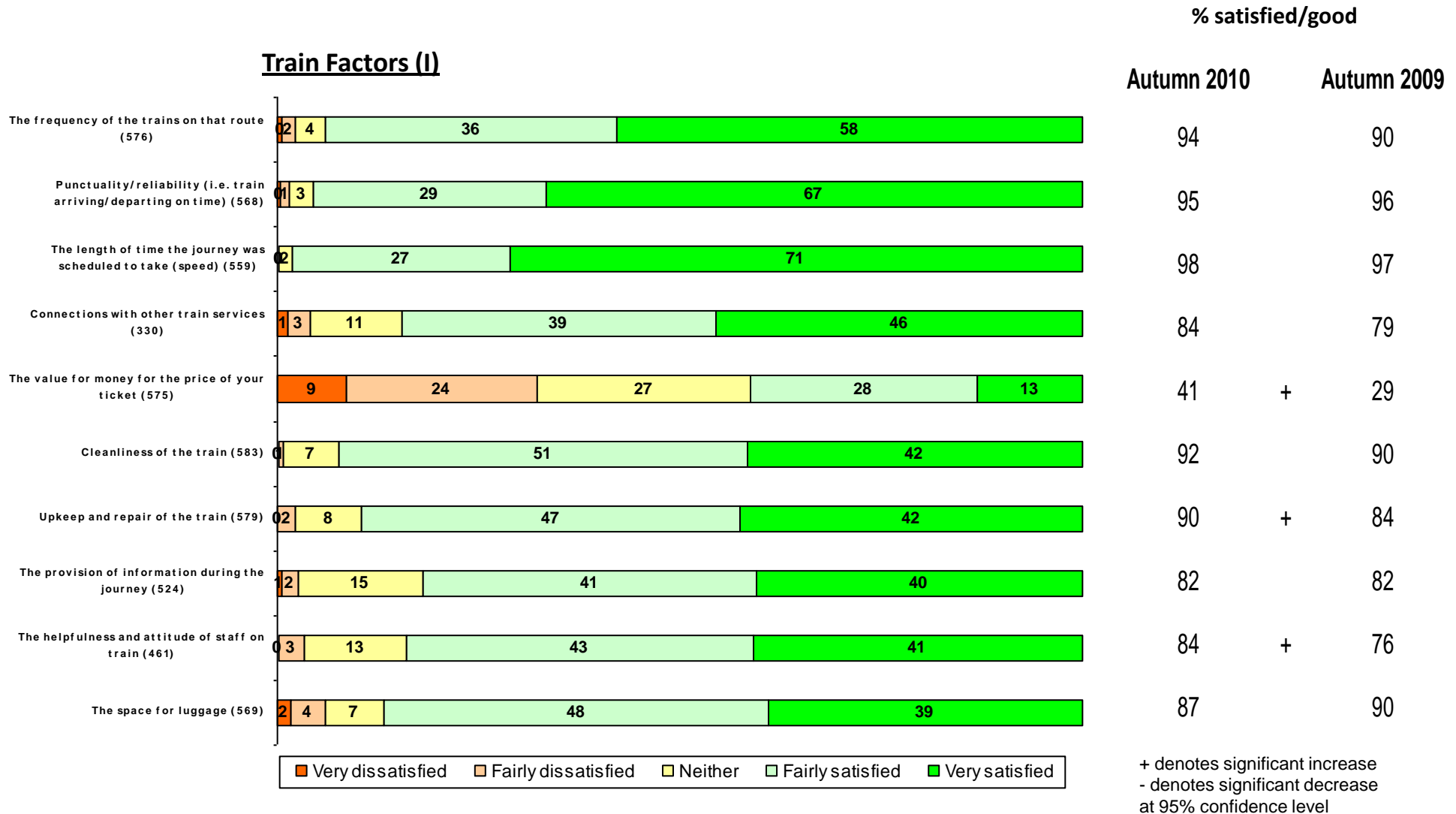
Overall Satisfaction and Station Factors



+ denotes significant increase
 - denotes significant decrease
 at 95% confidence level

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

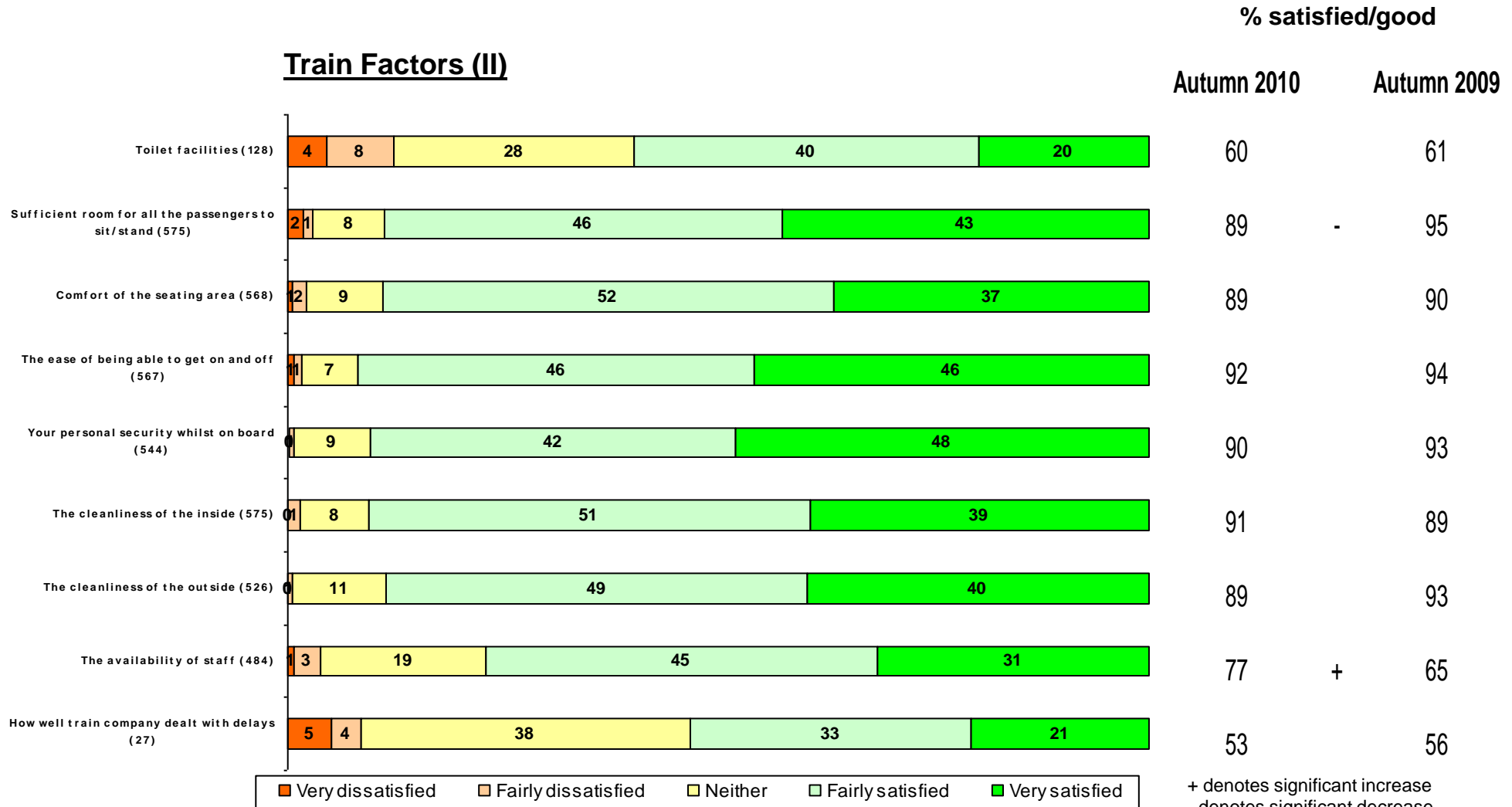
HEATHROW EXPRESS



NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

Train Factors (II)



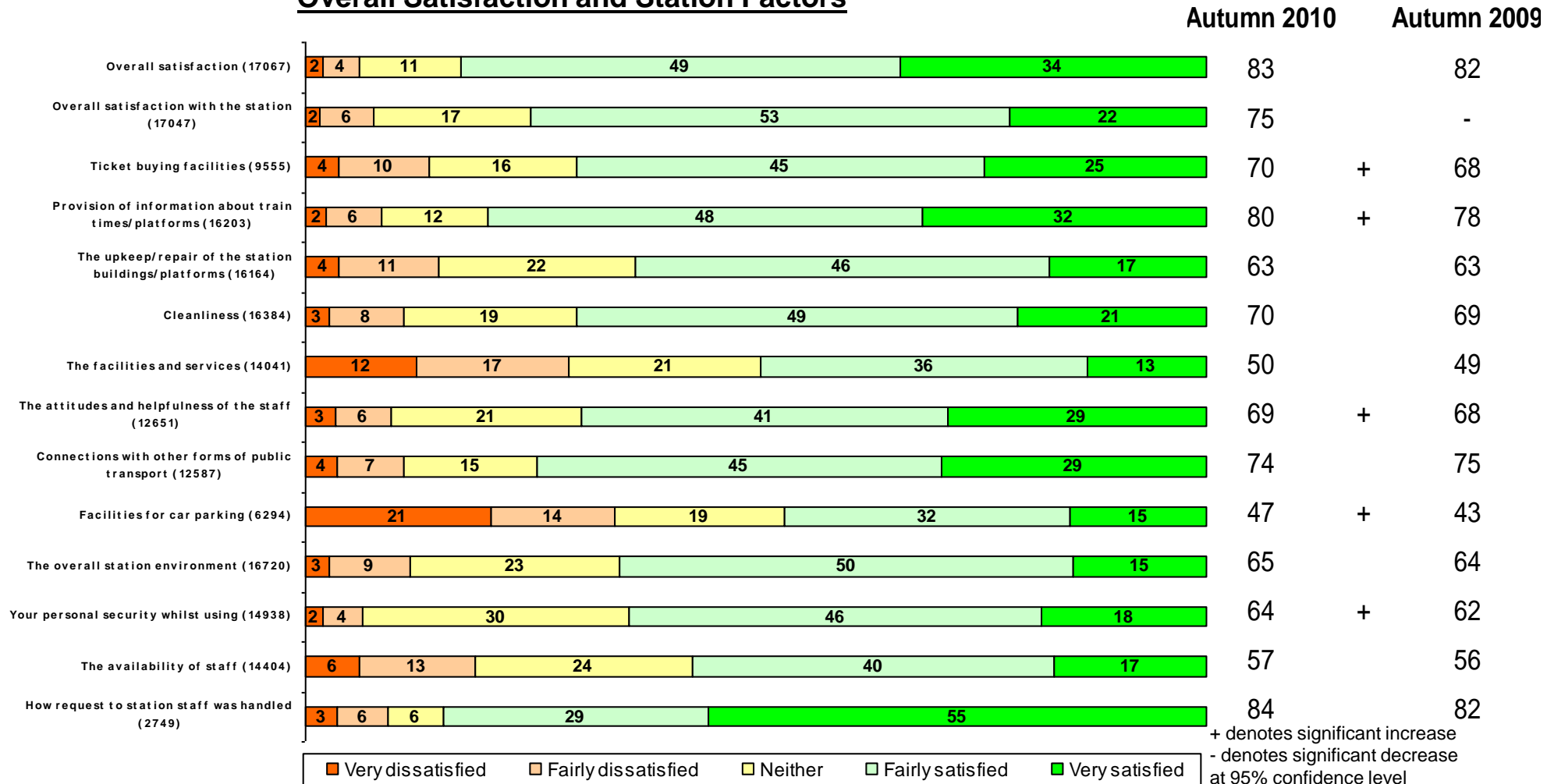
+ denotes significant increase
 - denotes significant decrease
 at 95% confidence level

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

LONDON AND SOUTH EAST

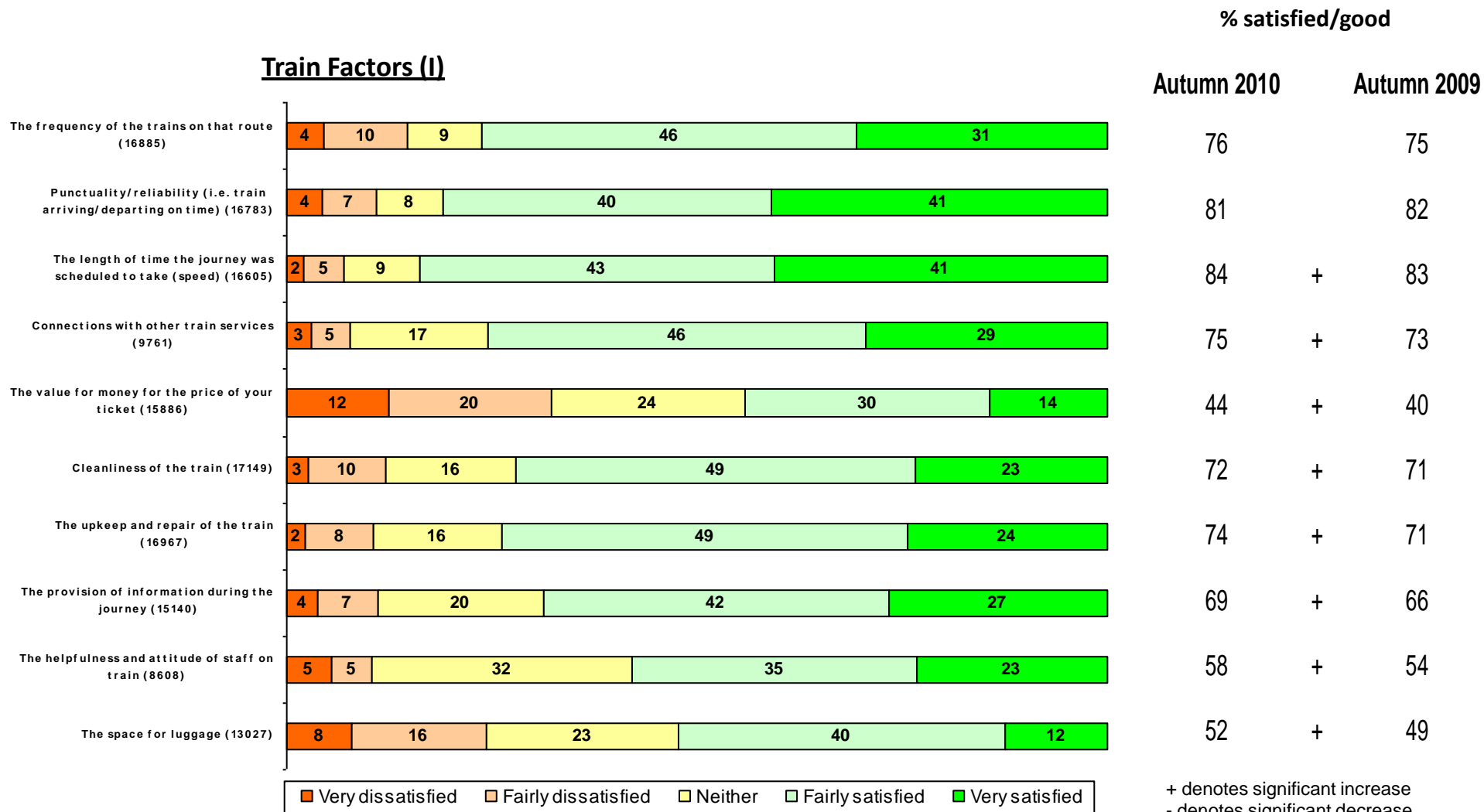
% satisfied/good

Overall Satisfaction and Station Factors



NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

LONDON AND SOUTH EAST

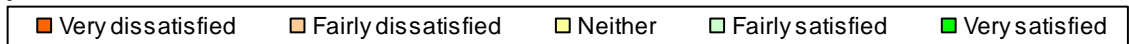
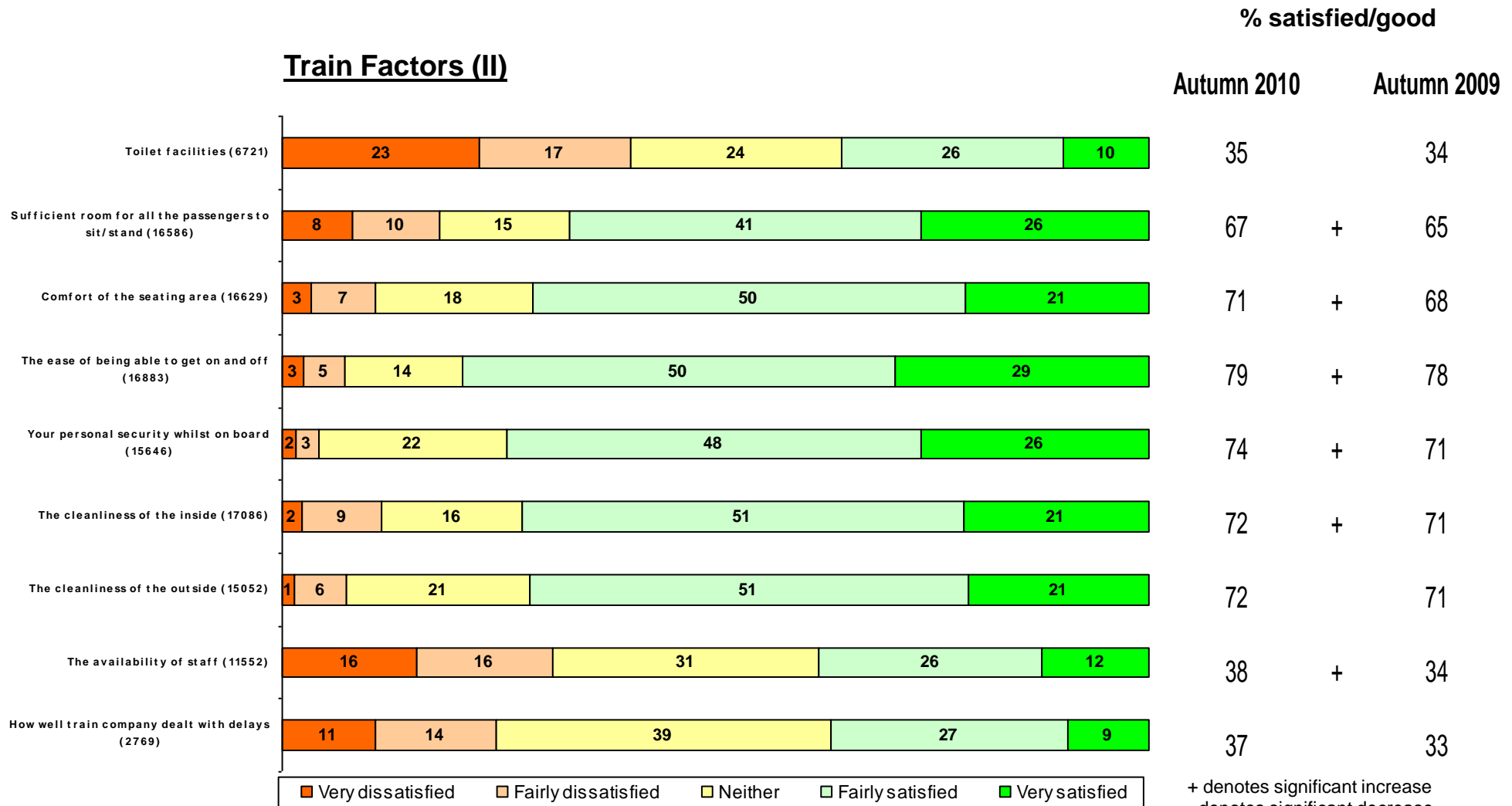


+ denotes significant increase
 - denotes significant decrease
 at 95% confidence level

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

LONDON AND SOUTH EAST

Train Factors (II)



+ denotes significant increase
 - denotes significant decrease
 at 95% confidence level

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

STATION FACTORS - TOC PERFORMANCE VERSUS SECTOR

	TOC	Sector	TOC Index
Overall Satisfaction	93	83	112%
Overall satisfaction with the station	84	75	112%
Ticket buying facilities	91	70	130%
Provision of information about train times/platforms	83	80	104%
The upkeep/repair of the station buildings/platforms	80	63	126%
Cleanliness	82	70	117%
Facilities and services	62	50	124%
The attitudes and helpfulness of the staff	81	69	116%
Connections with other forms of public transport	84	74	113%
Facilities for car parking	32	47	69%
The overall environment	77	65	118%
Your personal security whilst using	73	64	114%
The availability of staff at the station	71	57	124%
How request to station staff was handled	94	84	112%

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

TRAIN FACTORS - TOC PERFORMANCE VERSUS SECTOR

	TOC	Sector	TOC Index
The frequency of the trains on that route	94	76	123%
Punctuality/reliability (i.e. train arriving/departing on time)	95	81	118%
The length of time the journey was scheduled to take (speed)	98	84	117%
Connections with other train services	84	75	112%
The value for money for the price of your ticket	41	44	93%
Cleanliness of the train	92	72	128%
Upkeep and repair of the train	90	74	121%
The provision of information during the journey	82	69	119%
The helpfulness and attitude of staff on train	84	58	145%
The space for luggage	87	52	166%

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

TRAIN FACTORS - TOC PERFORMANCE VERSUS SECTOR

	TOC	Sector	TOC Index
The toilet facilities	60	35	168%
Sufficient room for all the passengers to sit/stand	89	67	133%
The comfort of the seating area	89	71	125%
The ease of being able to get on and off	92	79	116%
Your personal security whilst on board	90	74	122%
The cleanliness of the inside	91	72	125%
The cleanliness of the outside	89	72	124%
The availability of staff	77	38	202%
How well train company dealt with delays	53	37	145%

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

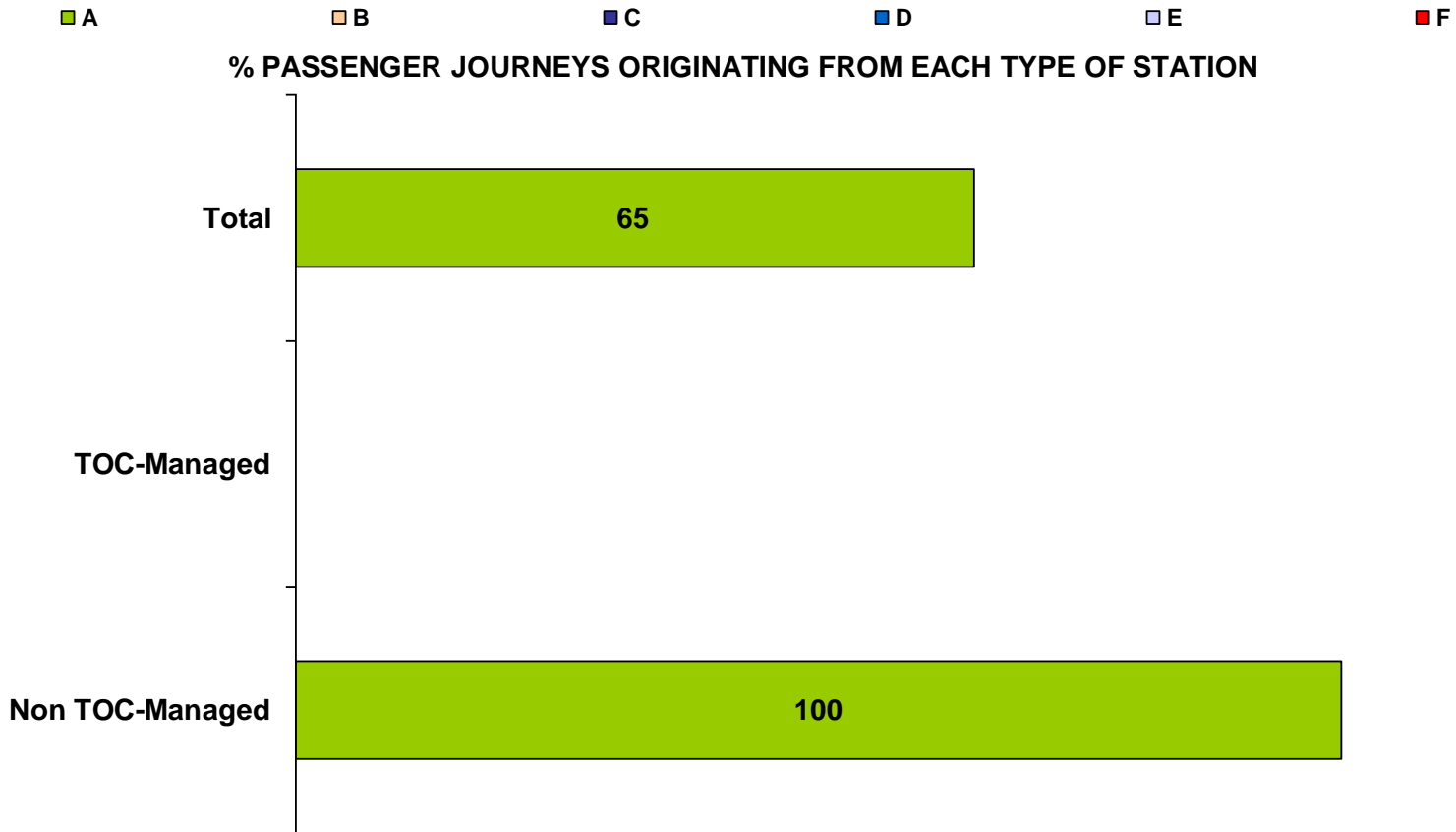
HEATHROW EXPRESS

STATION FACTORS – TOC-MANAGED VERSUS NON TOC-MANAGED

	TOC- Managed	Non TOC- Managed
Overall satisfaction with the station	87	83
Ticket buying facilities	90	92
Provision of information about train times/platforms	81	84
The upkeep/repair of the station buildings/platforms	91	72
Cleanliness	93	74
Facilities and services	53	67
The attitudes and helpfulness of the staff	81	81
Connections with other forms of public transport	79	86
Facilities for car parking	63	18
The overall environment	87	71
Your personal security whilst using	85	65
The availability of staff at the station	71	71
How request to station staff was handled	90	98

HEATHROW EXPRESS

NETWORK RAIL CATEGORISATION – TOC-MANAGED VERSUS NON TOC-MANAGED STATIONS

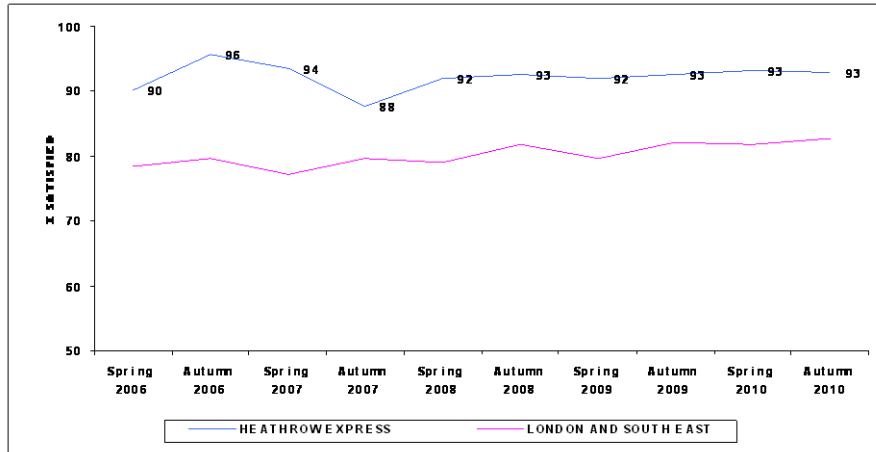


A=National hub, B = Regional hub, C = Important feeder, D = Medium staffed, E = Small staffed, F = Small unstaffed

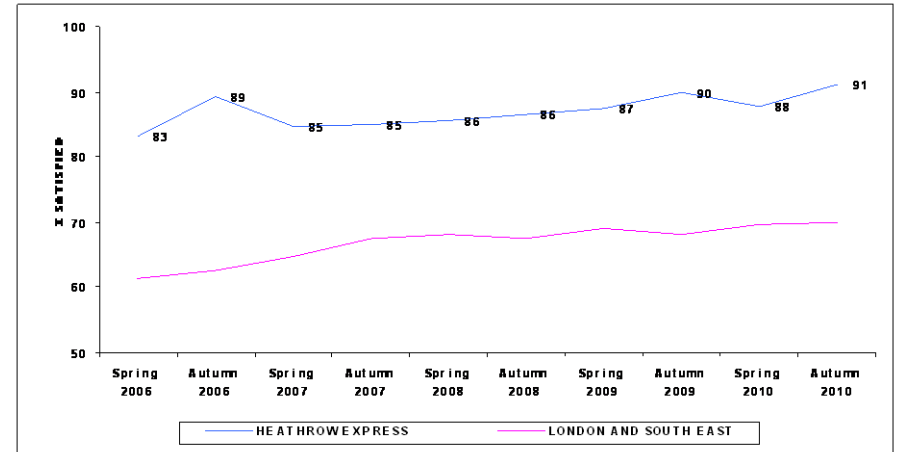
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

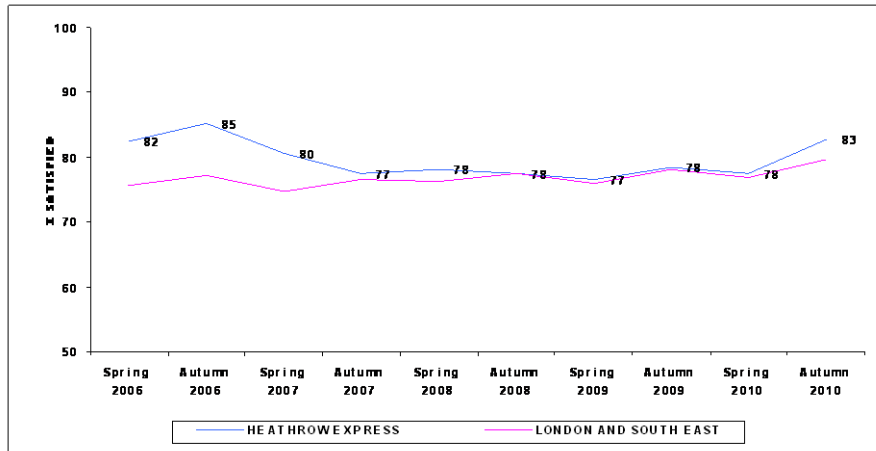
OVERALL SATISFACTION (566)



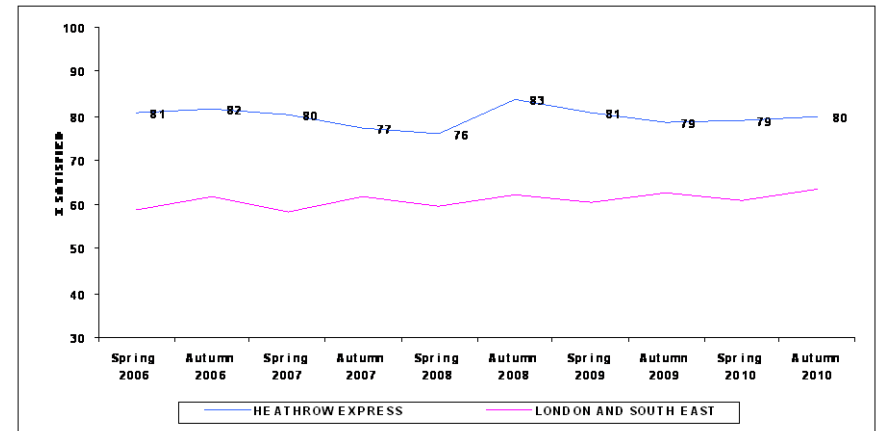
STATION - TICKET BUYING FACILITIES (425)



STATION - PROVISION OF INFORMATION ABOUT TRAIN TIMES/ PLATFORMS (549)



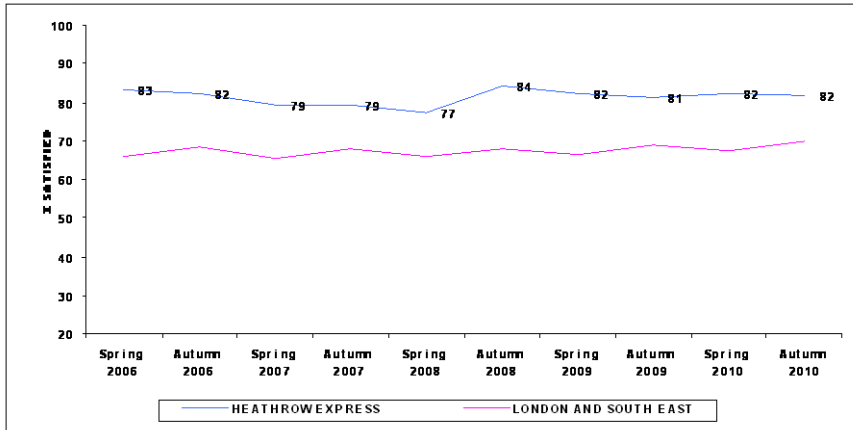
STATION - THE UPKEEP/ REPAIR OF THE STATION BUILDING/ PLATFORMS (534)



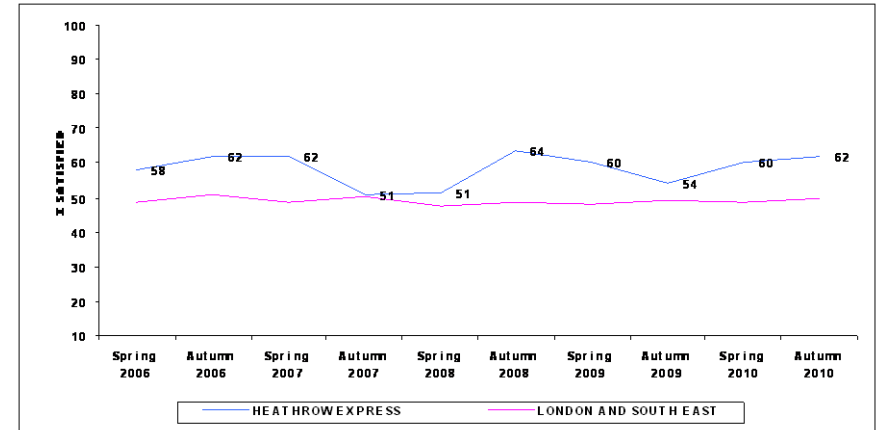
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

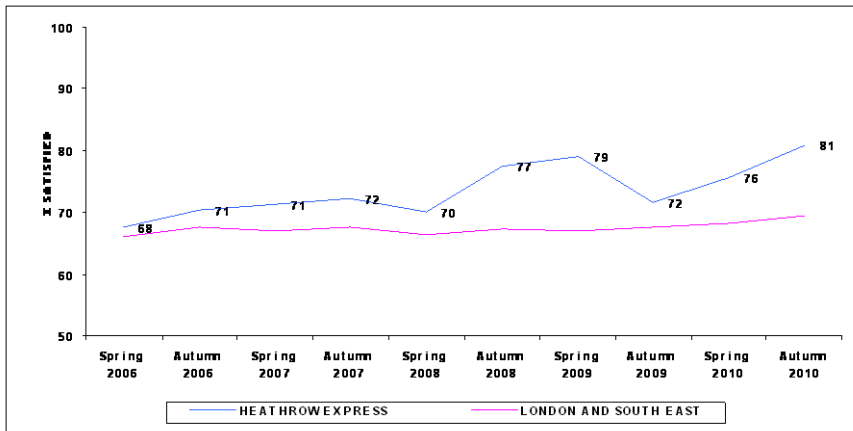
STATION - CLEANLINESS (550)



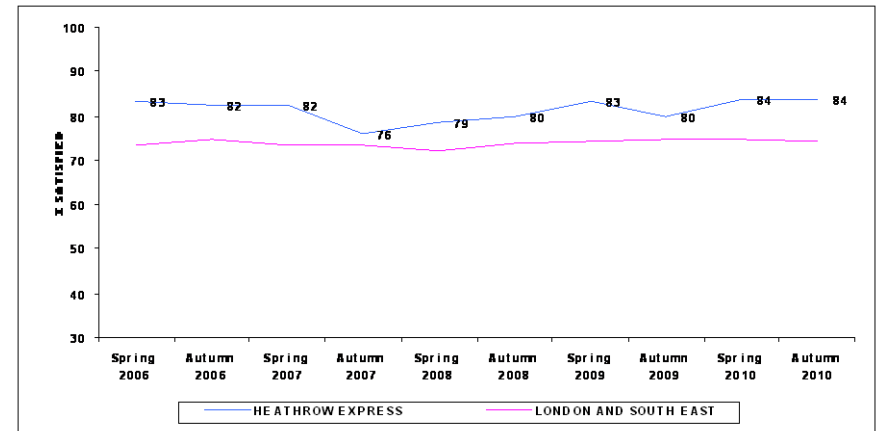
STATION - THE FACILITIES AND SERVICES (353)



STATION - THE ATTITUDES AND HELPFULNESS OF THE STAFF (407)



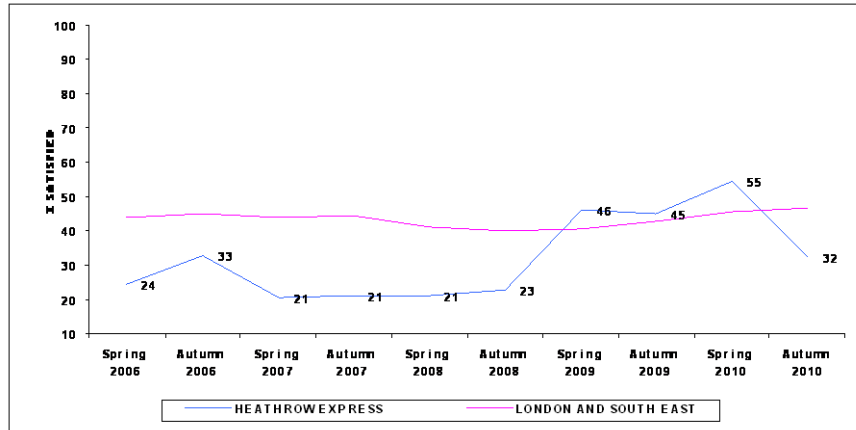
STATION - CONNECTIONS WITH OTHER FORMS OF PUBLIC TRANSPORT (411)



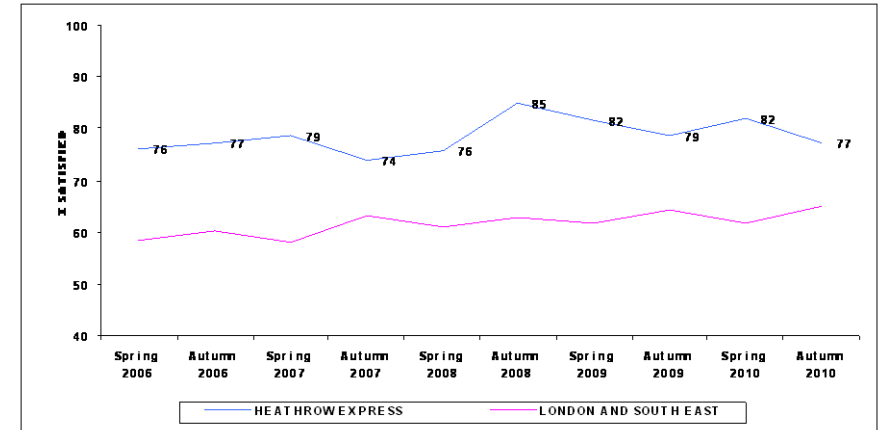
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

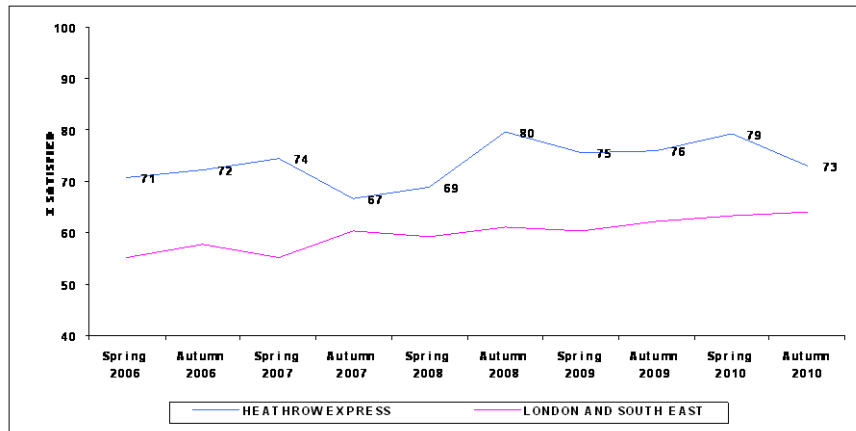
STATION - FACILITIES FOR CAR PARKING (63)



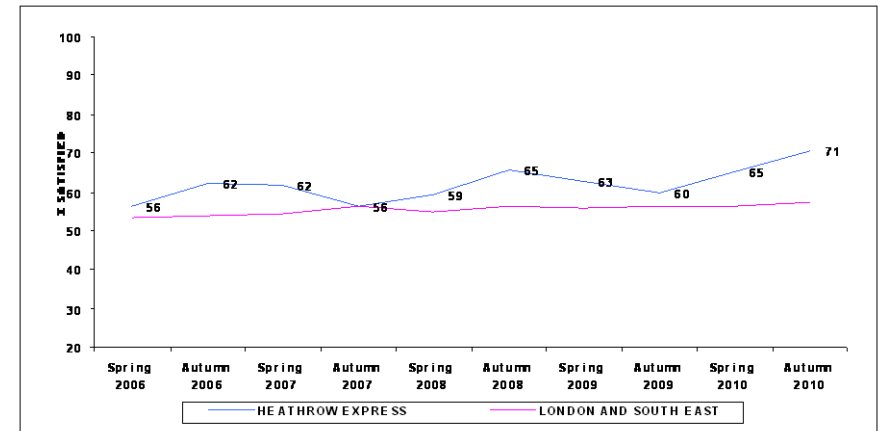
STATION - OVERALL ENVIRONMENT (552)



STATION - YOUR PERSONAL SECURITY WHILST USING (480)



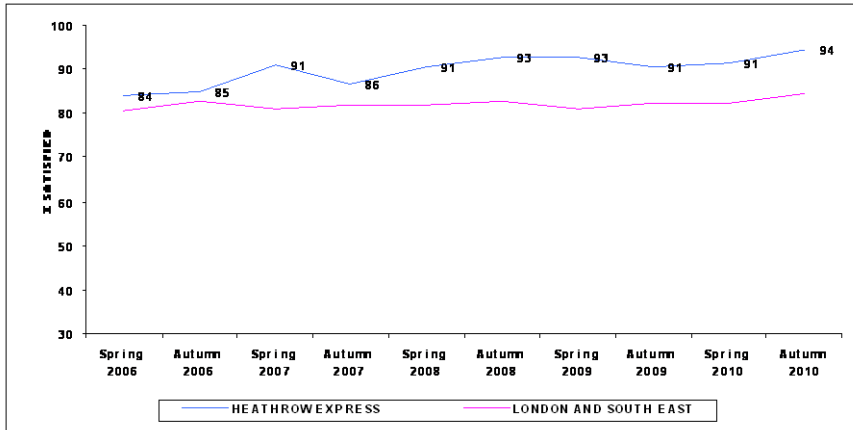
STATION - THE AVAILABILITY OF STAFF (457)



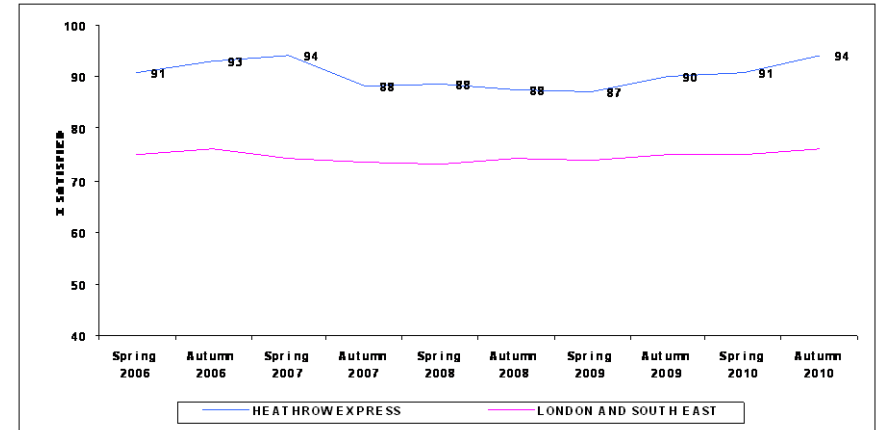
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

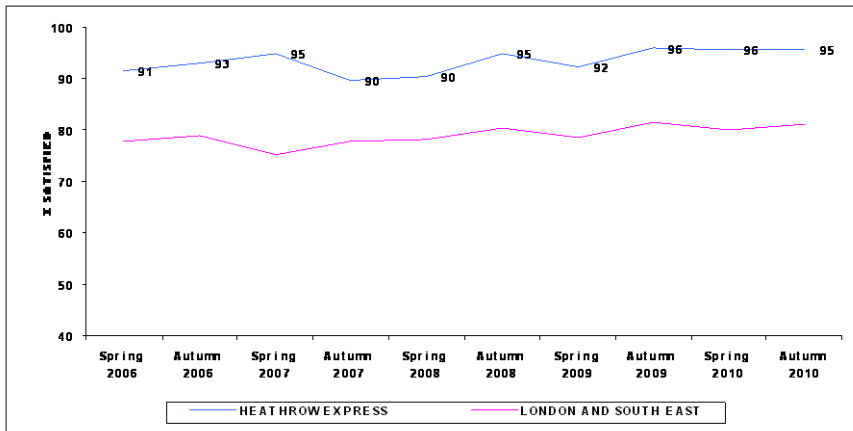
STATION - HOW REQUEST TO STATION STAFF WAS HANDLED (127)



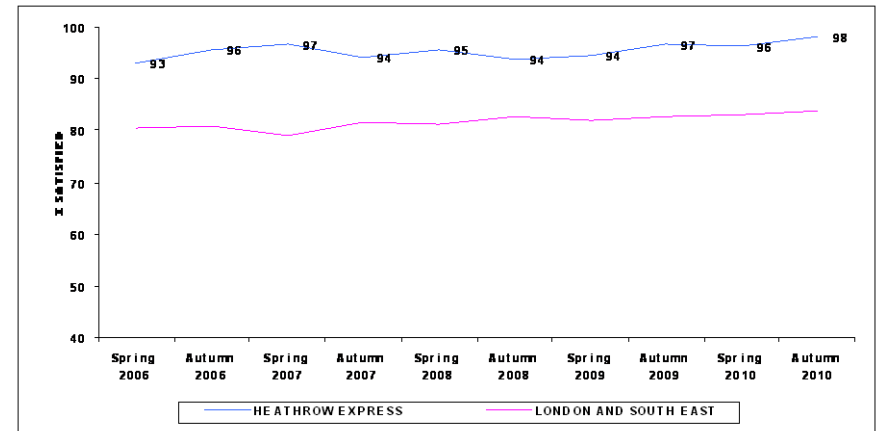
TRAIN - THE FREQUENCY OF THE TRAINS ON THAT ROUTE (576)



TRAIN - PUNCTUALITY/RELIABILITY (I.E. TRAIN ARRIVING/DEPARTING ON TIME) (568)



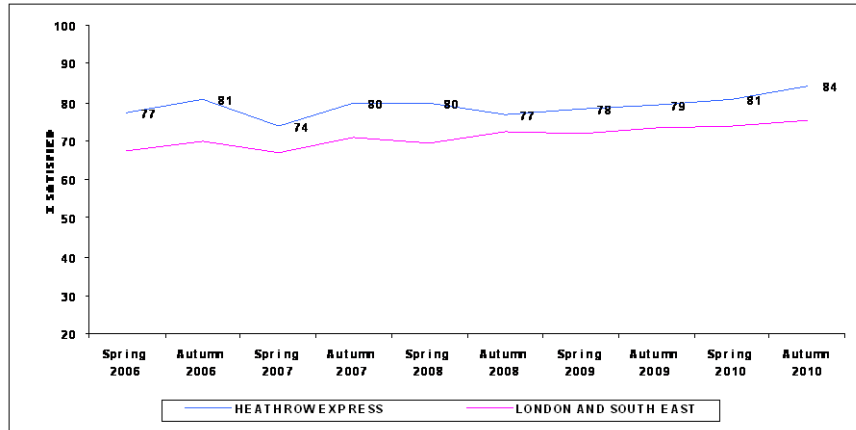
TRAIN - THE LENGTH OF TIME THE JOURNEY WAS SCHEDULED TO TAKE (SPEED) (559)



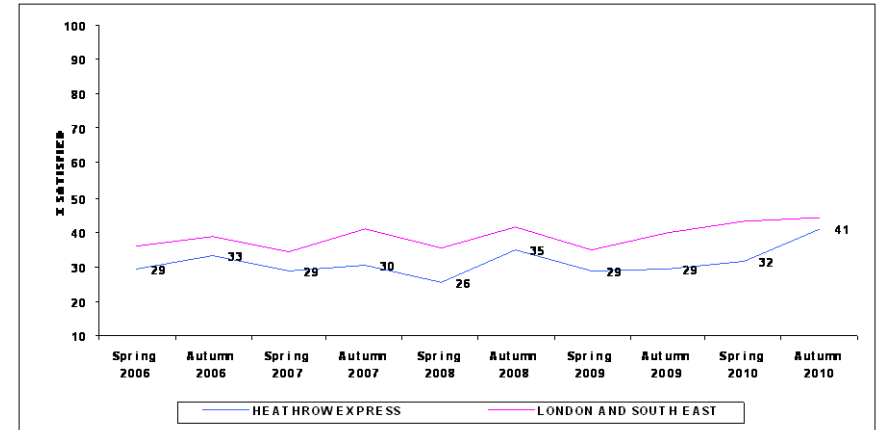
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

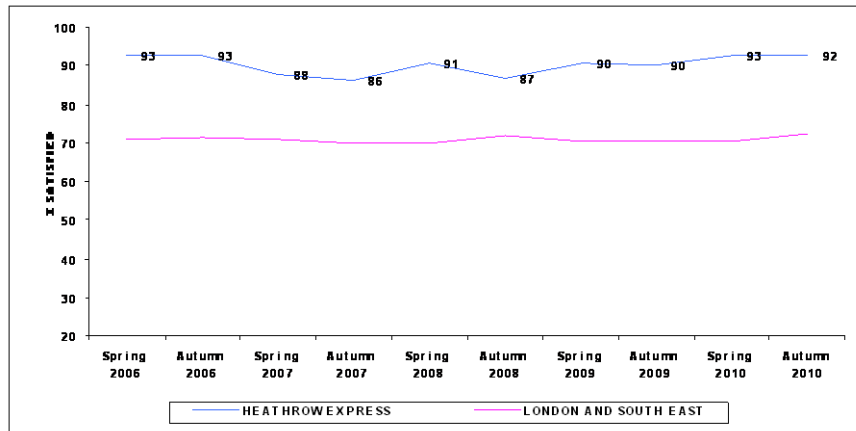
TRAIN - CONNECTIONS WITH OTHER TRAIN SERVICES (330)



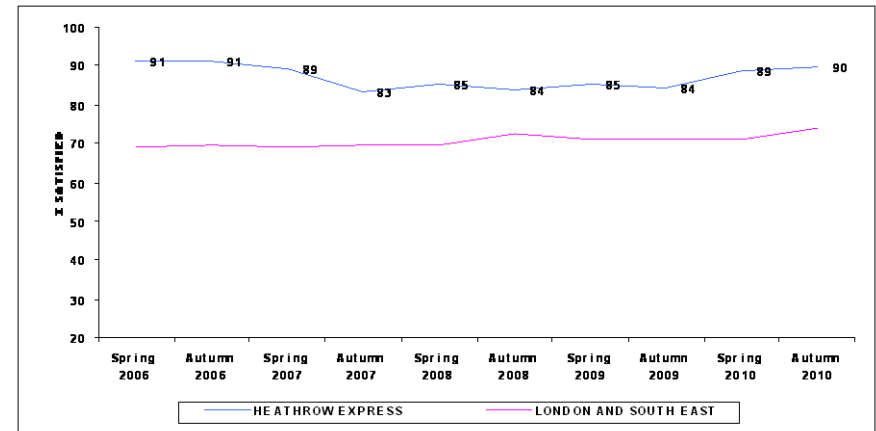
TRAIN - THE VALUE FOR MONEY FOR THE PRICE OF YOUR TICKET (575)



TRAIN - CLEANLINESS OF THE TRAIN (583)



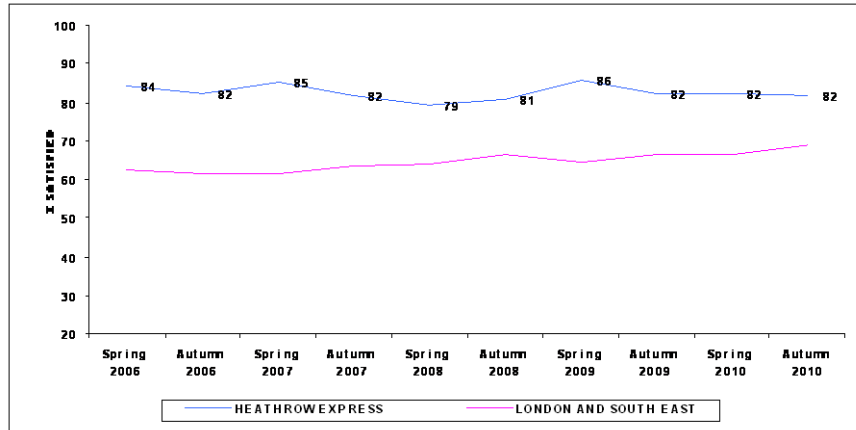
TRAIN - UPKEEP AND REPAIR OF THE TRAIN (579)



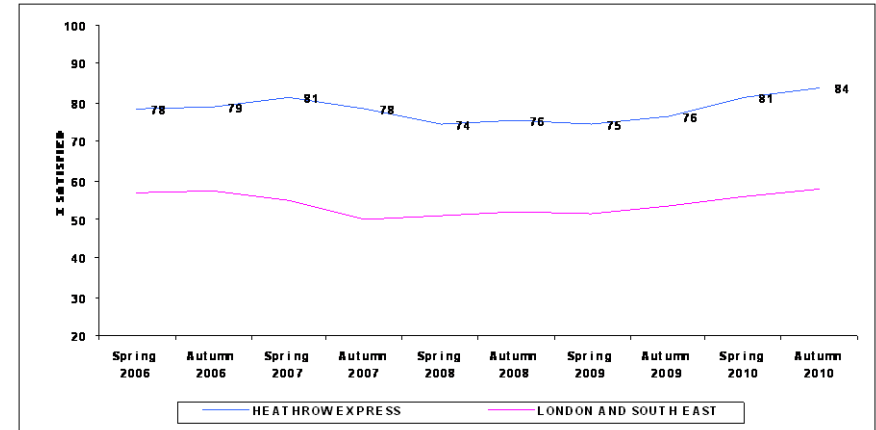
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

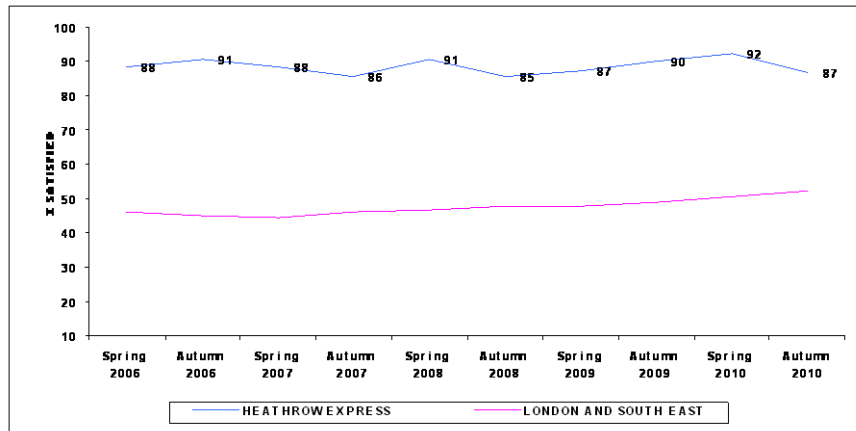
TRAIN - THE PROVISION OF INFORMATION DURING THE JOURNEY (524)



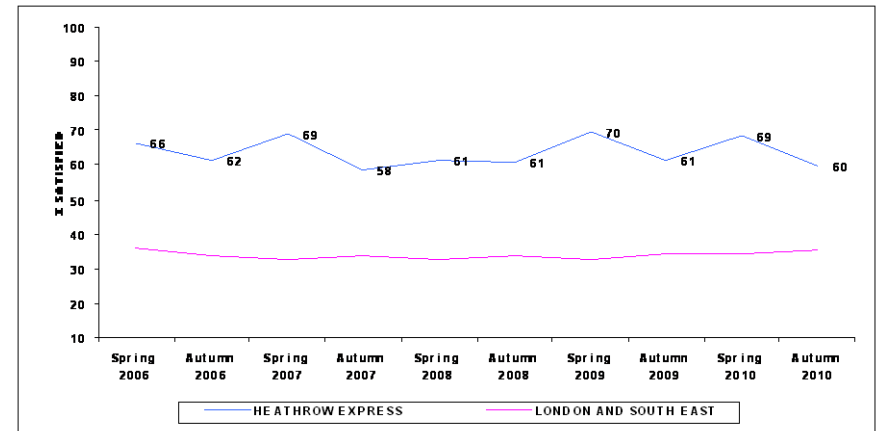
TRAIN - THE HELPFULNESS AND ATTITUDE OF STAFF ON TRAIN (461)



TRAIN - THE SPACE FOR LUGGAGE (569)



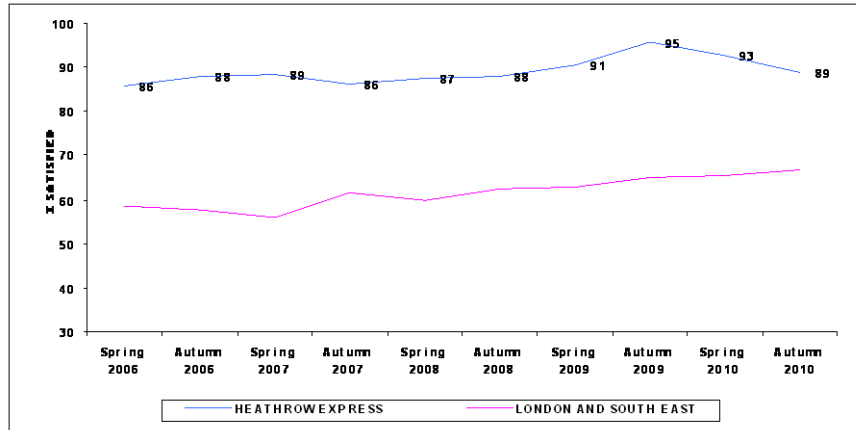
TRAIN - THE TOILET FACILITIES (128)



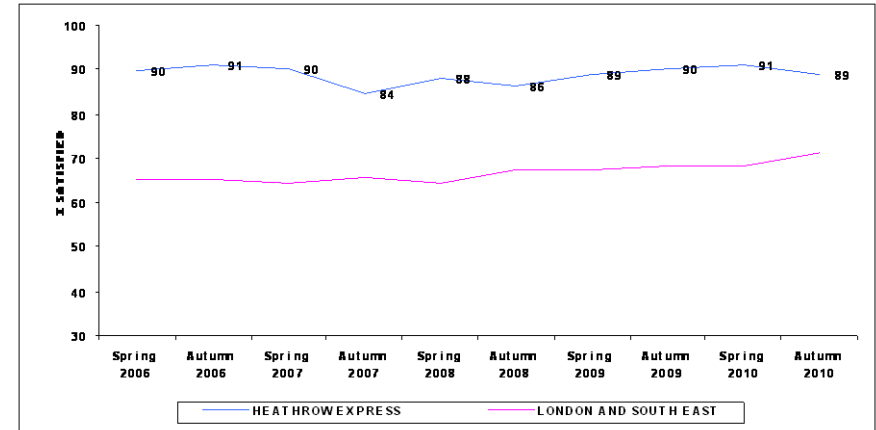
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

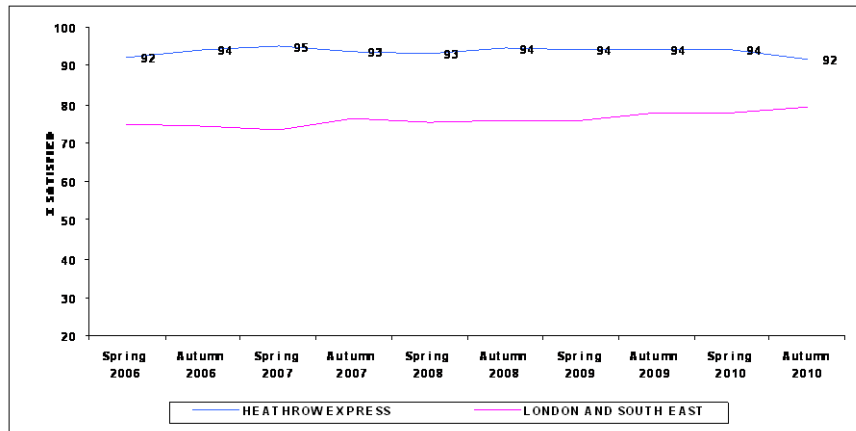
TRAIN - SUFFICIENT ROOM FOR ALL THE PASSENGERS TO SIT/STAND (575)



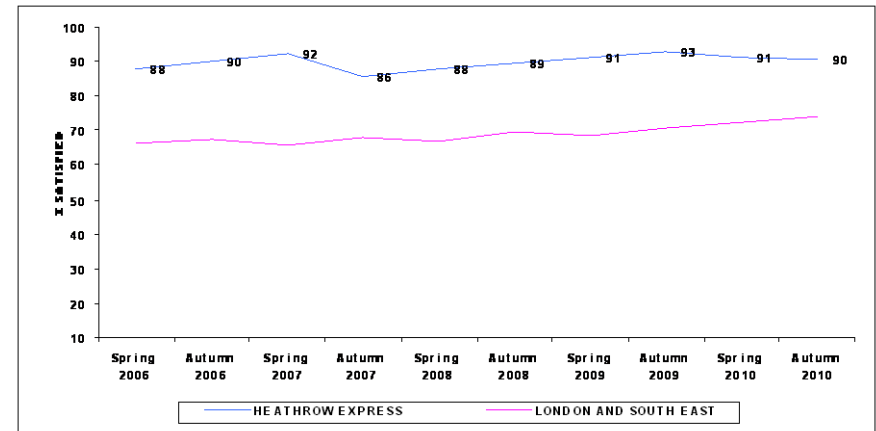
TRAIN - THE COMFORT OF THE SEATING AREA (568)



TRAIN - THE EASE OF BEING ABLE TO GET ON AND OFF (567)



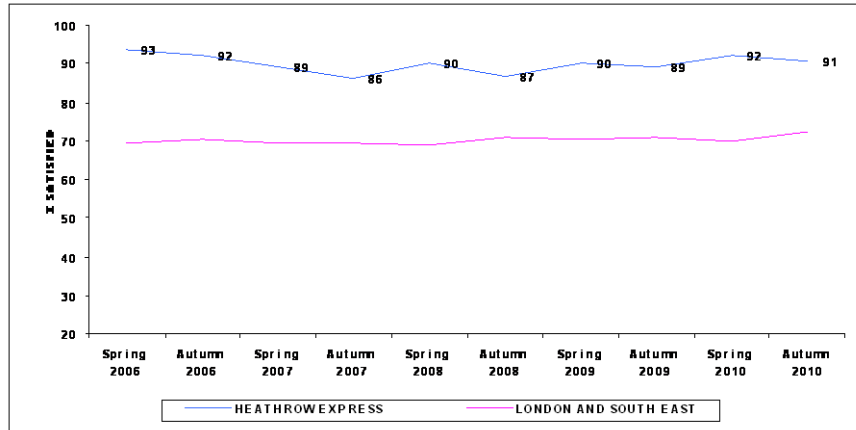
TRAIN - YOUR PERSONAL SECURITY WHILST ON BOARD (544)



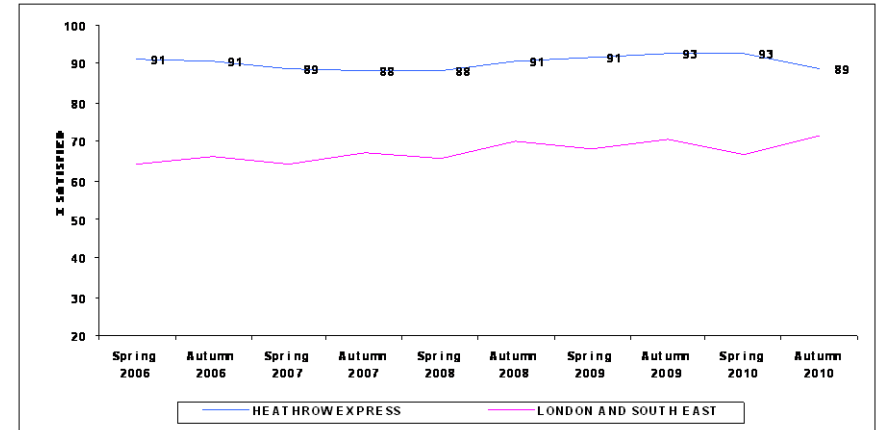
NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

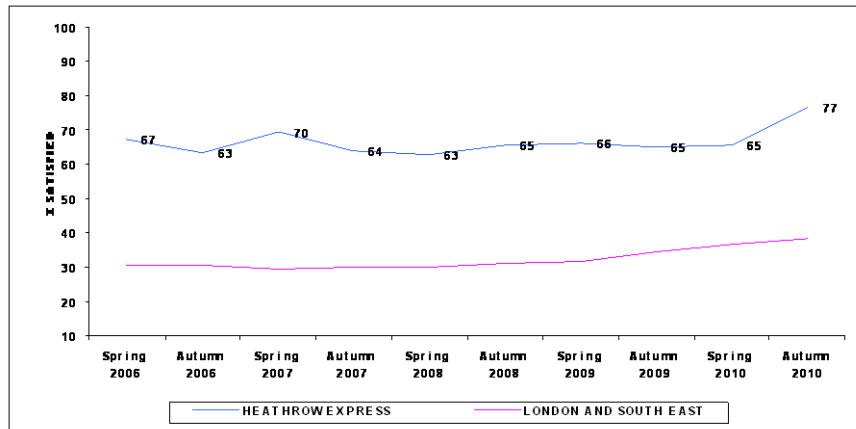
TRAIN - THE CLEANLINESS OF THE INSIDE (575)



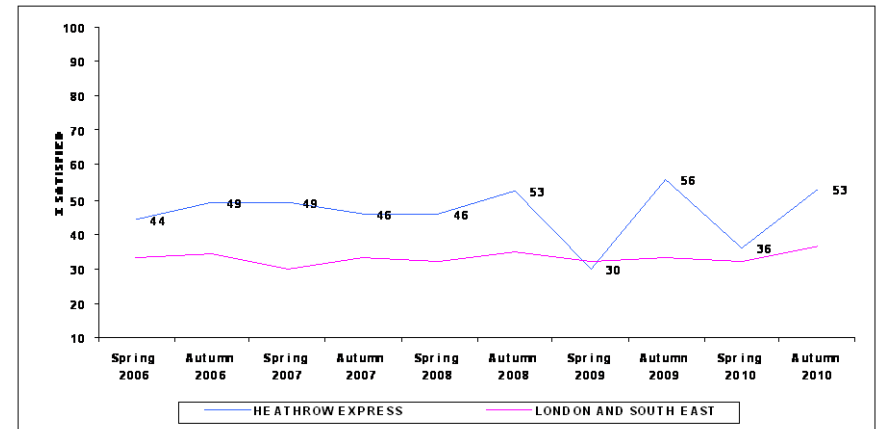
TRAIN - THE CLEANLINESS OF THE OUTSIDE (526)



TRAIN - THE AVAILABILITY OF STAFF (484)



TRAIN - HOW WELL TRAIN COMPANY DEALT WITH DELAY (27)



METHODOLOGY

Questionnaires are handed out at stations to customers about to board a train.

A reply paid envelope is provided for returning questionnaires.

Each Train Operating Company (TOC) is sampled separately. Interviewers are given a number of questionnaires to hand out at a station. At Gatwick and Heathrow Airports and for some shifts at certain London termini, questionnaires are handed out to passengers of a specific TOC. From Autumn 2003 onwards, at all other stations, questionnaires are handed out to passengers of any TOC (in the past, these were also targeted).

The number of questionnaires handed out will depend on:

- the size of station
- time of day
- length of shift

TOC data is compiled to provide a national sample.

Fieldwork is carried out each Spring (February/March) and Autumn (September/October). Up to Wave 8, fieldwork took place over 3 weeks. In Wave 9, the fieldwork was extended to an 11 week period, from 26 August to 9 November, to provide a better representation of journeys.

Quotas for returned questionnaires are set overall and by weekday/weekend, journey purpose and station size.

All data for a TOC in this Report is weighted up to the number of passenger journeys annually on the TOC and the profile of those journeys by:

- weekday/weekend
- journey purpose (Commuter, Business, Leisure)
- station size

The data for number of journeys and profiles by these variables was generated from ORR data (2007).

The stations for each TOC were stratified by number of passengers and a number of stations in each size stratum is sampled.

This sample design and weighting ensures that data is representative of all passenger journeys made on each TOC.

National results are constructed by combining data for all TOCs together, weighting by number of journeys.

For more details of NPS methodology, visit www.passengerfocus.org.uk

ISSUES AFFECTING WAVE 23

Wave 23 fieldwork (Main and Boost) was undertaken between 2nd September 2010 and 15th November 2010. Top up shifts were run between 14th October and the 26th November 2010.

Planned engineering works meant that some shifts were rescheduled. As usual, shifts were only rescheduled if the engineering work caused a station or line closure. Whenever possible the shifts went ahead as planned if there were still train services running.

Engineering works particularly affected shifts scheduled to be conducted on weekends both on train and at stations run by London Overground and Wrexham and Shropshire respectively. All shifts were rescheduled and conducted on the weekends where possible.

Due to shortfall on returns on certain TOCs the fieldwork period was extended from the 15th of November to the 26th.

Other than the Papal visit, and the Conservative Party conference there were no other events that caused major disruptions to the fieldwork schedule.

ISSUES AFFECTING WAVE 22

Planned engineering works meant that some shifts were rescheduled. As usual, shifts were only rescheduled if the engineering work caused a station or line closure. Whenever possible the shifts went ahead as planned if there were still train services running.

Engineering works particularly affected shifts scheduled to be conducted at stations run by London Overground. All weekend shifts due to be conducted at the later stages of the fieldwork period were brought forward due to weekend line closures from 20th February.

Due to illness amongst interviewers on the final weekend of fieldwork, the deadline for fieldwork completion was extended by one day to the 29th March to ensure that a few shifts could still be completed.

Other than Ascot races and a few rugby matches, sporting events accounted for little disruption to the field schedule.

ISSUES AFFECTING WAVE 21

Wave 21 fieldwork was undertaken between 1 September 2009 and 9 November 2009. Top up shifts were run between 10 November and 15 November 2009.

Planned engineering works meant that some shifts were rescheduled. As usual, shifts were only rescheduled if the engineering work caused a station or line closure. Whenever possible the shifts went ahead as planned if there were still train services running.

Some shifts had to be rescheduled because of heavy rain and line damage caused by flooding.

An increase in the number of flu infections among fieldworkers led to an increased number of shifts being rescheduled because of illness.

ISSUES AFFECTING WAVE 20

Wave 20 fieldwork was undertaken between 31 January 2009 and 27 March 2009. Top up shifts were run between 28 March and 9 April 2009. The main fieldwork period was similar to previous years, but the top-up period was slightly extended because of problems encountered earlier in the fieldwork period.

Extreme weather - in particular, heavy snow during the 1st week of February - caused a lot of disruption to the fieldwork schedule. Over 50% of all shifts originally scheduled for 2-6 February had to be postponed until later in the fieldwork period.

As always, planned engineering works meant that some shifts were rescheduled. As usual, shifts were only rescheduled if the engineering work caused a station or line closure. Whenever possible the shifts went ahead as planned if there were still train services running.

Over-running engineering work meant that further shifts had to be rescheduled during the course of the fieldwork, but this was not a great problem.

A few shifts were rescheduled to avoid clashing with Six Nations rugby matches, but sporting events did not cause much disruption to the original schedule.

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

HEATHROW EXPRESS

WEIGHTED SAMPLE PROFILE

	Autumn 2010 %	Autumn 2009 %		Autumn 2010 %	Autumn 2009 %
<u>SEX</u>			<u>DELAYS</u>		
Male	50	58	None	85	93
Female	26	37	Minor	3	4
Not stated	24	5	Major	0	1
			Not stated	11	2
<u>AGE</u>			<u>REGULAR TRAVELLER</u>		
16-25	2	3	Yes	23	29
26-34	16	16	No	77	71
35-44	22	30			
45-54	23	29	<u>TIME OF TRAVEL</u>		
55-59	6	9	Peak	22	15
60-64	4	5	Off peak	78	85
65+	3	4			
Not stated	23	3	<u>ASKED FOR HELP/INFORMATION</u>		
<u>JOURNEY PURPOSE</u>			Yes: Help	10	12
Commuter	2	3	Yes: Information	9	8
Business	68	68	Couldn't find anyone to ask	2	3
Leisure	30	29	No	74	76
			Not stated	7	2

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

LONDON AND SOUTH EAST TOCs

WEIGHTED SAMPLE PROFILE

	Autumn 2010 %	Autumn 2009 %		Autumn 2010 %	Autumn 2009 %
<u>SEX</u>			<u>DELAYS</u>		
Male	44	45	None	80	82
Female	52	52	Minor	16	14
Not stated	3	3	Major	3	2
			Not stated	2	2
<u>AGE</u>			<u>REGULAR TRAVELLER</u>		
16-25	11	10	Yes	68	69
26-34	17	18	No	32	31
35-44	20	21			
45-54	23	23	<u>TIME OF TRAVEL</u>		
55-59	9	9	Peak	19	24
60-64	8	8	Off peak	81	76
65+	9	9			
Not stated	2	1	<u>ASKED FOR HELP/INFORMATION</u>		
<u>JOURNEY PURPOSE</u>			Yes: Help	8	8
Commuter	52	51	Yes: Information	8	9
Business	15	16	Couldn't find anyone to ask	3	3
Leisure	33	33	No	80	80
			Not stated	2	1

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

SAMPLE COMPOSITION AND WEIGHTING

WEIGHTED DATA

	Annual Journeys ('000s)	Journey Purpose			Day Of Week		Station Size			
		Commute	Business	Leisure	Weekday	Weekend	Very Large	Large	Medium	Small
Sample size	27556	11014	4236	12306	24432	3124	8010	5522	7072	6952
Arriva Trains Wales	26420	28	8	64	81	19	27	21	26	26
c2c	32175	66	4	30	93	7	30	17	25	28
Chiltern Railways	17768	35	21	44	80	20	41	8	25	26
CrossCountry	29700	15	28	57	78	22	21	26	26	28
East Coast	17733	13	27	60	79	21	39	13	19	29
East Midlands Trains	22317	23	28	49	82	18	21	23	29	26
First Capital Connect	97672	45	26	29	86	14	20	26	27	27
First Great Western	83870	30	20	50	77	23	21	27	26	26
First TransPennine Express	22295	24	14	62	78	22	20	28	26	27
London Midland	52930	45	14	41	85	15	31	18	25	27
London Overground	55746	64	3	33	83	17	22	28	25	26
Merseyrail	40082	37	8	55	80	20	21	27	25	27
National Express East Anglia	106689	60	17	23	89	11	29	16	26	28
Northern Rail	94518	38	9	53	76	24	23	26	26	25
ScotRail	73238	39	13	47	80	20	28	18	28	26
Southeastern	153264	61	12	27	90	10	16	32	26	26
Southern	162014	50	16	34	90	10	17	33	24	26
South West Trains	190065	53	15	32	85	15	39	16	16	29
Virgin Trains	23172	9	31	60	85	16	32	5	35	28

NATIONAL PASSENGER SURVEY - WAVE 23 - AUTUMN 2010

SAMPLE COMPOSITION AND WEIGHTING

UNWEIGHTED DATA

	Sample size	Journey Purpose			Day Of Week		Very Large	Station Size		
		Commute	Business	Leisure	Weekday	Weekend		Large	Medium	Small
Sample size	27556	11014	4236	12306	24432	3124	8010	5522	7072	6952
Arriva Trains Wales	776	41	8	50	86	14	16	28	27	29
c2c	1084	64	6	30	93	7	25	30	24	21
Chiltern Railways	1230	43	16	41	92	8	43	3	28	27
CrossCountry	1433	30	20	51	86	14	14	34	29	24
East Coast	1723	13	29	58	90	10	51	10	15	24
East Midlands Trains	1108	34	21	45	85	15	28	24	23	24
First Capital Connect	1618	56	13	31	95	5	22	20	31	26
First Great Western	3374	32	19	49	86	14	36	20	24	20
First TransPennine Express	1086	34	19	47	88	12	24	29	21	26
London Midland	1069	48	10	43	92	8	22	22	21	36
London Overground	750	57	10	32	91	9	31	21	26	22
Merseyrail	526	43	3	54	94	6	20	26	30	24
National Express East Anglia	2073	40	10	50	84	17	37	10	28	25
Northern Rail	1027	46	7	46	89	11	24	28	28	21
ScotRail	1021	38	13	49	87	13	24	12	38	26
Southeastern	1665	50	9	41	87	13	18	34	27	22
Southern	2347	46	14	40	90	10	27	23	22	29
South West Trains	2296	48	11	41	89	11	30	15	23	32
Virgin Trains	1350	18	34	48	89	11	31	8	36	25

NPS REPORTS PRODUCED EACH WAVE

The following NPS standard reports are produced each wave:

Report	Contents include
Summary report	Summary tables for all TOCs (including comparison with one year previously), trend tables for last 10 waves by TOC, trend charts for the main NPS factors, peak vs off-peak analysis for LSE TOCs.
TOC reports	Tables and graphs showing results for TOC (including comparisons with one year previously and with relevant sector), trend charts for all factors (including sector and benchmark (if relevant) comparisons), summary profile of passengers surveyed, station sample sizes for TOC and sample composition & weighting.
Stations report	Percentage of passengers satisfied by each main factor for last 10 waves for all stations covered by NPS during that time period
Consultees report	Summary national trend charts for all main factors, trend charts by age/journey purpose & gender, summary results for leisure/business passengers & commuters, one page for each factor showing national trend and results for all TOCs, Government Office Region charts for each factor and simple tables for some questions that are not included in the main NPS report
Best in class report	Trend tables showing results for all main factors for all TOCs back to wave 1 (autumn 1999)
Multivariate report	Multivariate analysis showing drivers of satisfaction and dissatisfaction nationally, by sector and by TOC for latest two NPS waves combined
Personal security at stations report	Percentage of passengers satisfied and dissatisfied with personal security at all stations that were included in the NPS for the last 10 survey waves
Rankings report	Results since wave 10 showing satisfaction score for each TOC by factor, significant changes since one year earlier, national rank and rank in TOC type
Virtual TOC reports	NPS reports for TOCs that used to exist or that are planned to exist in the future (exactly the same format as TOC reports)
Building block report	Summary results showing satisfaction for all building blocks for all main NPS factors
PTE reports	NPS reports for all PTEs (exactly the same format as TOC reports)
Demographic reports	Simple reports for all TOCs showing demographic profile (and answers to other questions)
Tables reports	Quite detailed tables for all TOCs showing results for the majority of NPS questions by gender, age, journey purpose, time of week and whether they were a frequent traveller or not