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#### 1. Executive Summary

#### **Background**

Passenger Assist is a free service offered by rail companies which provides passengers with disabilities, or anyone else who may require help, with assistance to enable them to make their journey. Rail companies' participation in Passenger Assist is mandated through their regulatory requirement to have a Disabled People's Protection Policy approved by the Office of Rail and Road. The intent of Passenger Assist is to make rail travel accessible to everyone.

Passengers can request assistance by booking it in advance of their journey. Train and station operators can, as a maximum, require bookings to be made 24 hours prior to travel. Passenger Assist is open to anyone who needs assistance; this could be due to a disability or long-term health condition, a temporary health issue or old age, and no proof is required to demonstrate someone's eligibility to use the service. Assistance can take various different forms – from being assisted into the station, help with luggage, help to find a seat, to help to getting on and off the train or while moving around stations. The responsibility for the assistance at each station is with the designated operator of that station, known as the Station Facility Operator (SFO).

ORR commissioned this research to explore passenger experiences of Passenger Assist across the whole process – from booking through to receiving assistance and satisfaction with the service provided. For the purposes of this research, and so that it was possible to link results back to a specific SFO, each passenger was asked to evaluate a recent journey they had made. In addition, some general questions about their overall experience of Passenger Assist were also asked.

#### Methodology

When booking assistance, a record is created in the Passenger Assist database for each assist rather than for each journey, journey leg or each passenger. Each station a passenger is travelling through where they require assistance has a record created for each type of assistance they have booked. The data on the number of booked assists is available by SFO and interview targets were set for each SFO based on the proportion of total booked assists they received in 2015-2016 in order to ensure that the sample was representative of the rail industry as a whole.

The Rail Delivery Group (RDG), who manage the Passenger Assist booking system, provided Breaking Blue with assistance records from the database on a weekly basis during the survey period, which was segmented by each booking method. All sample files were de-duplicated to ensure each respondent only appeared once and each time a new sample file was received passengers who had already been contacted were removed. To maximise participation, the research consisted of a combined approach of online and telephone interviews. In total 4,060 interviews were achieved – 2,648 telephone interviews and 1,412 online interviews.

#### Who we spoke to

The majority of people we spoke to were passengers requiring assistance themselves (79 percent); the rest were companions travelling with someone requiring assistance (21 percent).



Most people using Passenger Assist had made the journey before (75 percent), but are not frequent users of Passenger Assist. Just over three quarters (78 percent) use Passenger Assist less often than once a month. The most common reason for travelling is for leisure (81 percent).

The majority of people who receive assistance are female (69 percent). Most people who receive assistance are aged 64 or older (61 percent), and a similar proportion are retired (65 percent).

The most common type of disability that people who receive assistance have is a physical disability (61 percent). A smaller proportion have a vision impairment (17 percent) or a hearing impairment (13 percent). Around one in five (22 percent) have another long-term condition and just over one in ten do not have any disability or long-term health condition.

#### **Importance of Passenger Assist**

The majority (63 percent) of passengers stated they could not have completed the journey without Passenger Assist. Another third (35 percent) could have completed their journey, but with more difficulty.

#### What assistance are passengers booking?

Passengers can request a range of types of assistance depending on their needs. The most common type of assistance booked is help boarding or alighting the train (58 percent), followed by help with luggage (49 percent). Just over a quarter of those using Passenger Assist book help getting to the platform (29 percent) and a similar proportion book provision of a ramp (28 percent). A much smaller proportion of passengers book the on-train wheelchair area or assistance getting to the wheelchair area (11 percent and nine percent respectively) and only six percent request guidance because they are visually impaired.

A third of passengers (33 percent) book one type of assistance, a further quarter (25 percent) book two types of assistance and the remaining passengers book at least three types of assistance. Note that this data relates to the assistance required at a single station; therefore the total number of assists requested on a typical journey will be a multiple of these numbers. For example, a journey from Glasgow Central to York via a change at Edinburgh Waverley could, on a routine basis, reasonably involve around five to six different types of assistance being required overall to complete the journey in each direction.

#### **Experience of booking Passenger Assist**

Passenger Assist can be booked by telephone, by email or via the web and booking records from the RDG show that the most common method for booking Passenger Assist is via telephone. The majority of the people we interviewed had booked via the telephone (82 percent) whilst around one in ten (12 percent) had booked via email and a small proportion booked via the web (six percent). The majority received confirmation of the booking (82 percent), and when confirmation is received the information is typically correct (97 percent). A large majority of those who receive a booking confirmation find the information about when and where to meet the staff easy to understand. After making the booking, almost three quarters (72 percent) are confident after booking that their requirements will be met on the day they travel.



Satisfaction with the booking process both overall and in relation to the assistance arrangements and helpfulness of staff is consistently high, with approximately nine in ten passengers overall satisfied, and three quarters very satisfied.

#### **Experience on the day of travel**

The majority of passengers are met by staff as expected (about 81 percent), whilst just under one in ten (nine percent) are not met by staff. The rest (seven percent) are met, but after some delay.

The vast majority of assistance booked is received, with most types of assistance being received by 85 percent or more of the people who booked it. Most users book multiple types of assistance for a journey leg, but only eight in ten passengers (81 percent) receive <u>all</u> the assistance they have booked, whilst slightly over one in ten (12 percent) receive none of the assistance.

Almost all passengers are able to complete their journey leg as planned (95 percent). Two percent complete their journey leg but not as planned, and just one percent are unable to complete their journey leg.

#### Satisfaction with journey measured

The majority of passengers who receive assistance are satisfied with it (92 percent). However, it is important to note that satisfaction with the journey was not asked to everyone booking assistance but asked only those who were met by staff (88 percent). Consistent with overall satisfaction, the majority of those who receive each individual type of assistance are happy with it.

The majority of passengers who are met by staff are very satisfied with the staff providing the assistance. Satisfaction is above 90 percent for both measures – the helpfulness and attitude of staff who provided assistance at the station (94 percent) and that staff understand their needs (92 percent). This is consistent with the satisfaction with overall staff helpfulness when using the assisted travel service (90 percent of all those using the service). Satisfaction scores on these metrics vary by disability type, however.

#### Overall satisfaction with Passenger Assist and suggestions for improvement

Overall satisfaction with Passenger Assist is slightly lower than satisfaction with the journey measured, with 85 percent satisfied. A similar proportion (83 percent) are satisfied with station facilities, however the proportion who are very satisfied with station facilities is lower than the equivalent for overall satisfaction or satisfaction with staff helpfulness (59 percent compared to 65 percent and 76 percent respectively).

Passenger suggestions for improvement centre on training, communication, and improving the booking process. Passengers suggested training staff so they are more confident and better able to identify disabilities and provide passengers with the assistance they need. Passengers would also like a more joined up service, and to be reassured that messages about where they are, and any changes to their journey are communicated between stations. Streamlining the booking process to remove any repetitiveness and ensuring that the system remembers information previously provided would also improve passengers' experience. Potential tweaks to the scope of the service so it becomes closer to an end-to-end offer rather than just one operating within the railway "estate".



#### **Conclusions and recommendations**

In general, satisfaction levels with Passenger Assist are high and the vast majority of passengers complete their journey as planned (only one percent of passengers were unable to complete the journey leg they were interviewed about).

However this conceals some issues with reliability of the service and failure rates for individual aspects of the service can be as high as one in five. Anecdotal evidence suggests that the apparent inconsistency between these failure rates and the small proportion of passengers not completing their journey is due to the passengers managing by themselves, being helped by fellow passengers, or eventually being assisted by staff after a delay (e.g. assisted on to a later train).

Many passengers book multiple assists and require all these assists to work to continue their journey so a metric measuring whether all booked assists occurred on a journey leg could monitor performance, along with satisfaction targets for overall satisfaction, staff helpfulness (percent satisfied), and station facilities (percent satisfied).

Beyond these basic reliability measures, there are a number of improvements to the service which would enhance passengers' experience. Staff training needs to be broadened and communications skills improved; users want staff to better understand the complexity of disabilities and appreciate challenges each person faces. Staff understanding that passengers, who are often anxious, need extra time and assurance is important. People with hidden disabilities reported lower satisfaction and poorer outcomes across a number of end-to-end metrics so this should be a particular area of focus.

Station facilities are seen as considerably less satisfactory than other aspects of the journey. Passengers ultimately want to be less dependent on assistance and in the longer term more accessible stations and trains will enable that.

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#### 2. Introduction

The independent safety and economic regulator for Britain's railways is the Office of Rail and Road (ORR). A condition of the operating licences that ORR grants to mainline train and station operators requires them to establish and comply with a Disabled People's Protection Policy (DPPP). This DPPP sets out in detail the arrangements that an operator will put in place to support disabled people using its services. A key aspect of ORR's regulatory work is to oversee that train operating companies (TOCs) and Network Rail fulfil the commitments they make to passengers in their DPPP.

A primary element of the DPPP is the requirement for train and station operators to participate in Passenger Assist which obligates them to provide assistance free of charge to passengers with disabilities, and anyone else who may require help, to enable them to make their journey. Passenger Assist therefore plays a crucial role in making rail travel accessible to all passengers irrespective of their circumstances.

ORR commissioned Breaking Blue to investigate the extent to which Passenger Assist was meeting users' needs and expectations overall, and to explore how well individual operators were performing in terms of meeting their Passenger Assist obligations.

The results of the quantitative phase of this study are set out in this report. A follow-up qualitative phase is currently in the field, the findings of which is expected to be published in a separate report in December 2017.

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#### 3. Background and objectives

Passengers Assist allows those passengers who need assistance to book it in advance of their journey. Train and station operators can, as a maximum, require bookings to be made 24 hours prior to travel. Bookings can be made by email or online, although the majority of bookings made are by telephone using a Freephone number.

Passenger Assist is open to anyone who needs assistance; for example due to a disability or long-term health condition, temporary health issue or old age, and no proof is required to demonstrate someone's eligibility to use the service. The service can take various different forms – from being assisted into the station, help with luggage, help to find a seat, to help to getting on and off the train or while moving around stations. The responsibility for the assistance at each station is with the designated operator of that station, known as the Station Facility Operator (SFO). However, the provision of assistance in the station can be subcontracted, for example, from Network Rail to a Train Operating Company (TOC), or this responsibility can be shared between TOCs. Nevertheless, the SFO, from a regulatory perspective, remains responsible for the station and is accountable for any assistance provided within it.

Consistent with this, for the purposes of this research ORR decided that the assistance provided at each station would be allocated to the relevant SFO regardless of which company the staff providing the assistance worked for. The results at company level are accordingly grouped and analysed by SFO. Since it may not be apparent to the passenger who the SFO is for the station they travelled to or from, the assignment of results to SFOs is based on the Passenger Assist booking records, rather than by the passengers' recall of who they booked or travelled with.

The overall aim of this research is to explore passenger experiences of Passenger Assist across all aspects of the service and to seek feedback on any potential areas for improvement. The specific research objectives are as follows:

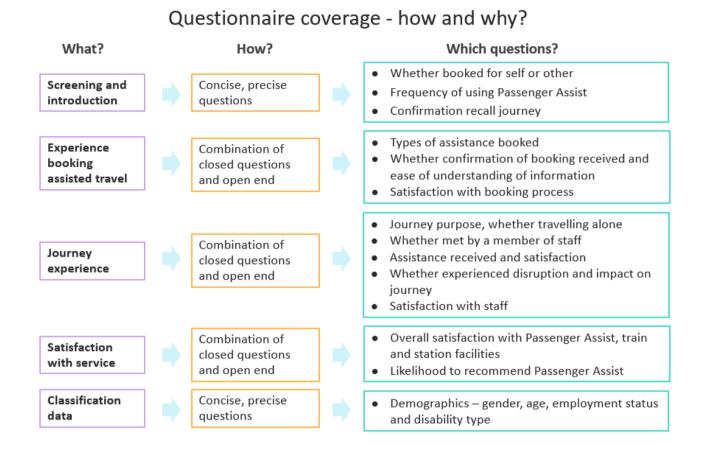
- Profile assisted travel service users, including their demographic characteristics, the journey purpose, frequency of use of the train and the assisted travel service;
- Evaluate a recent journey from booking assistance through to the actual journey and experience on the day;
- Understand overall satisfaction when travelling by train using Passenger Assist and reasons for any dissatisfaction with the service; and
- Gather feedback from Passenger Assist users on ways to improve the service.

A primarily quantitative questionnaire was used, devised jointly by ORR and Breaking Blue with input from Network Rail and a number of TOCs (especially those TOCs with experience of using surveys to measure Passenger Assist satisfaction on their own services and stations).

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#### Clarifying the parameters of the research

At some stations, there is also a "Turn-up and go" service whereby passengers can arrive at the station and request assistance that has not been booked in advance<sup>1</sup>. This type of unbooked assisted travel was <u>outside</u> the scope of this research and is covered by a separate ORR commissioned research programme involving mystery shopping.

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<sup>&</sup>lt;sup>1</sup> Rail operators should provide assistance to passengers where this has not been arranged in advance, a 'Turn up and go' service, where this is reasonably practicable.



#### 4. Methodology

When booking assistance, a record is created in the Passenger Assist database for each assist rather than for each journey, journey leg or each passenger. Each station a passenger is travelling through where they require assistance has a record created for each type of assistance they have booked. Return journeys are also treated as separate records. For example, a passenger travelling from London Euston to Birmingham New Street who wanted help with luggage plus assistance boarding and alighting the train would have a record created for each of the assistance types requested at each station (so there would be four records created for the outbound journey – two at London Euston and two at Birmingham New Street - and a further four for any return journey – two at Birmingham New Street and two at London Euston). At least one additional field for each journey leg is created showing any disability type, for example visually impaired, learning disability, etc. To allow attribution of the results to a specific SFO, passengers were asked about assistance given at a particular station rather than across the entire journey (or indeed instead of their experience of the entire service).

The data on the number of booked assists is available by SFO and interview targets were set for each SFO based on the proportion of total booked assists they received in 2015-2016 in order to ensure that the sample was representative of the rail industry as a whole. These targets are shown in the table below.

Some operators have a low target sample size due to the low number of bookings that they receive. These operators are Chiltern Railways, Merseyrail, TfL Rail, c2c, London Overground, Hull Trains, Grand Central, Caledonian Sleeper, CrossCountry, and Heathrow Express<sup>1</sup>. This meant that for these operators there was a very limited number of passengers in the sample files we could contact for an interview. With the exception of Chiltern Rail for whom limited data is available, data for these operators is not available individually, although they are included in the overall sample.

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<sup>&</sup>lt;sup>1</sup> For Hull Trains, Grand Central, Caledonian Sleeper and CrossCountry this is because they do not manage any stations.

SFO	Target no. of interviews
Network Rail	1,000-1,270
Great Western Railway	525-600
Virgin Trains West Coast	345-400
Virgin Trains East Coast	335-390
South West Trains	220-260
ScotRail	195-225
Arriva Trains Wales	185-215
East Midlands Trains	180-210
Govia Thameslink Railway	150-170
Northern	120-140
London Midland	115-135
Greater Anglia	110-125
TransPennine Express	85-100
Southeastern	75-100
Other TOC/station operator	As many as possible
TOTAL	4,000

Fieldwork was conducted between 28th February and 8th August 2017. The Rail Delivery Group (RDG), who manage the Passenger Assist system, provided sample from their database on a weekly basis during this period, which was segmented by each booking method. A combined approach of online and telephone interviews was used to give everyone the opportunity to participate in the manner they felt most comfortable with.



The initial approach for all records containing an email address was by email. However, in the invite to the online survey, all passengers were given the opportunity to contact us if they preferred to take part over the telephone. The telephone sample was drawn from all those not supplying an email address at the time of the booking, all those not completing the survey online, and all those contacting us indicating a preference to be interviewed by telephone.

The sample files contained a record for each assist booking rather than each passenger, which meant it needed to be de-duplicated. To avoid sample bias, the following elements were randomly selected for each respondent: the leg of the journey; the station (start, finish or interchange); and the type of assist. In addition, for each sample file, passengers who had been contacted already were removed from the new sample. This means that each of the 4,060 surveys completed was from a unique individual.

This report details the findings overall and any differences between relevant sub-groups (such as age, customer or companion, disability type, and how the booking was made). Certain sub-groups are only reported on for questions which are directly relevant to them, for example differences between Network Rail (NR) Fully Managed and Managed Light stations<sup>1</sup> are only reported with respect to the assistance given by station staff, and not for the bookings process which is the same for journeys via either type of station.

Significance testing was conducted at the 95% level and where there are differences between any sub-groups with a large enough sample size and/or difference in results to be significant these have been reported. We have generally avoided reporting differences between sub-groups which are not statistically significant, however in a small number cases we have done so (mainly where they are consistent with other data points which are statistically significant). If there is no mention of the sub-groups then this is because there are no meaningful differences to be reported.

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<sup>&</sup>lt;sup>1</sup> A Fully Managed Network Rail station means that all the assistance is provided by Network Rail staff. In a Managed Light station Network Rail sub-contract assistance provision to one or more TOCs. Regardless of the assistance provision arrangements in place, Network Rail remains responsible for all assistance provided in these stations as the station licence holder and SFO.



#### 5. Who we spoke to

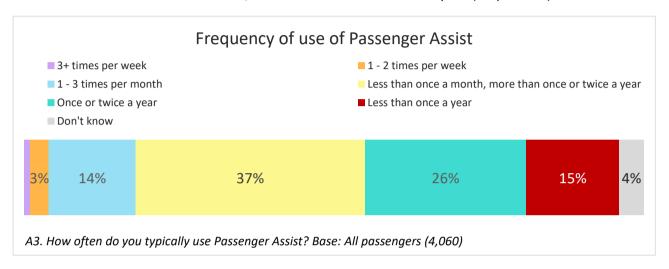
In total 4,060 passengers were interviewed. Four-fifths of people we spoke to are passengers using Passenger Assist themselves (79 percent) and one-fifth are companions who accompanied someone using Passenger Assist (21 percent).

SFO	No. of interviews		
Network Rail	1,159		
Great Western Railway	454		
Virgin Trains West Coast	396		
Virgin Trains East Coast	437		
South West Trains	170		
ScotRail	206		
Arriva Trains Wales	215		
East Midlands Trains	169		
Govia Thameslink Railway	155		
Northern	131		
London Midland	185		
Greater Anglia	115		
TransPennine Express	108		
Southeastern	90		
Chiltern Railways	39		
Other SFO	31		
TOTAL	4,060		



#### **Frequency of use of Passenger Assist**

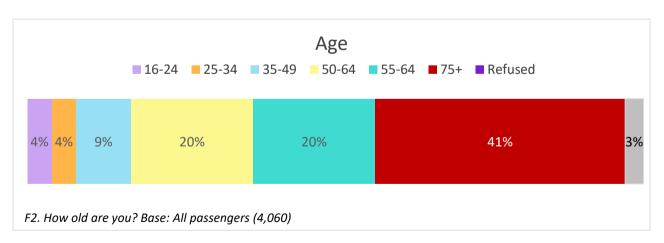
Three quarters (75 percent) have made the journey before and the most common reason for travelling is for leisure (81 percent). Despite the high proportion who have made the journey before, the majority use Passenger Assist infrequently; two fifths use Passenger Assist no more frequently than once or twice a year (41 percent) whilst almost a further two-fifths use Passenger Assist less often than once a month, but more often than twice a year (37 percent).



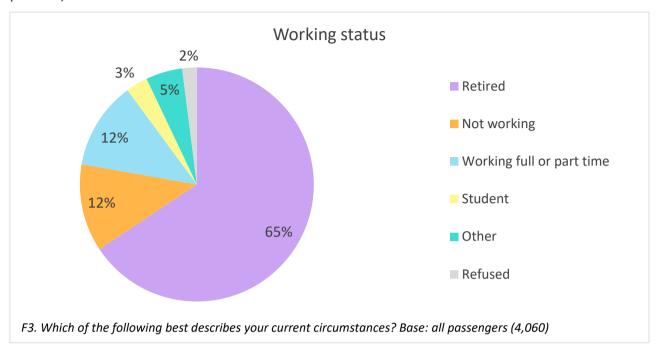
#### **Profile of users**

The majority (69 percent) of people who receive assistance are female, whilst 24 percent are male and the remaining seven percent preferred not to say their gender.

The majority of people who receive assistance are aged 64 or older (61 percent), whilst a small proportion (8 percent) are aged 34 or under.



Reflecting the age profile, almost two-thirds of people who receive assistance are retired (65 percent).

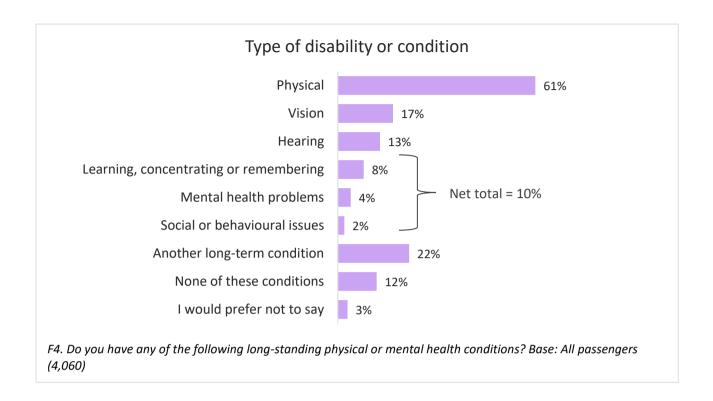


There are a few potential reasons why we spoke to more women than men. Firstly, if we look at the age profile of people travelling by train we know that for people aged over 65 women make up a greater proportion of rail passengers than men. Secondly, it is possible that either women are more likely to need Passenger Assist due to having more medical conditions or that they are more willing to ask for assistance than men.

#### Type of disability or condition

The most common type of disability that people who receive assistance have is a physical disability (61 percent). A smaller proportion have a vision impairment (17 percent) or a hearing impairment (13 percent). One in ten have a hidden disability (problems learning or concentrating or remembering, mental health problems, or social or behavioural issues). Around one in five (22 percent) have another long-term condition and just over one in ten do not have a disability or long-term health condition.





The incidence of physical disabilities and vision or hearing impairments is linked to the age of the passenger using Passenger Assist. A greater proportion of younger passengers using Passenger Assist have a physical disability, vision or hearing impairment or hidden disability, whilst a greater proportion of older passengers have another long-term condition or simply require assistance. The table below shows disability type or condition by age.

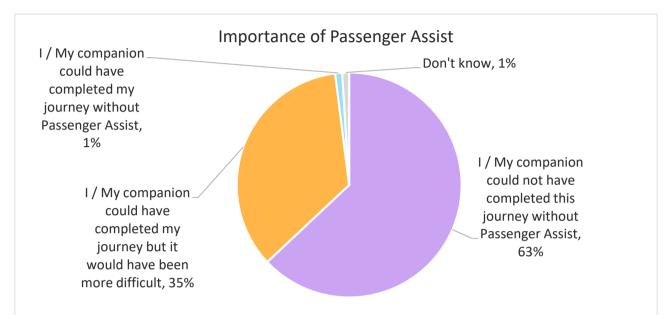
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	16-24 (149)	25-34 (177)	35-49 (363)	50-64 (796)	65-74 (824)	75+ (1,646)
Physical	66%	67%	71%	70%	64%	53%
Vision	28%	28%	23%	18%	13%	15%
Hearing	9%	7%	5%	6%	9%	21%
Learning or concentrating or remembering	20%	10%	13%	9%	4%	6%
Mental health problems	13%	12%	11%	7%	3%	1%
Social or behavioural issues	12%	4%	4%	2%	0%	0%
Another long-term health condition	15%	14%	17%	23%	24%	24%
None of these conditions	4%	5%	8%	6%	10%	18%
I would prefer not to say	3%	2%	1%	2%	3%	2%
NET: Hidden condition	32%	19%	20%	13%	6%	7%



#### 6. Importance of Passenger Assist to the passenger

Passenger Assist is of extreme importance to the passengers who use it; the majority (63 percent) indicate that they could not have completed the journey without it. Another third (35 percent) indicate that they could have completed their journey but with more difficulty.



D20. We are keen to know how helpful you found Passenger Assist in terms of making the train journey possible or simply more convenient. Which of the following best describes your experience? Base: All able to continue journey (3,586)

More travel companions (68 percent) than customers (61 percent) agree that they could not have completed the journey without Passenger Assist, possibly because those travelling with companions have greater needs than those travelling alone. Passengers with mental health problems (79 percent) are more likely than those with other disabilities to agree that they could not have completed the journey without Passenger Assist. However, there is no group of passengers with disabilities for whom fewer than 60 percent say they could have completed the journey without Passenger Assist. Even amongst those with no condition almost half (48 percent) would have been unable to complete the journey.

'I am very grateful, it allows me to be independent. There must be huge numbers of people who need it, because apart from people with mental health difficulties like mine, I imagine a lot of elderly people need to be met as well. It is a common need.'

(65-74, mental health)

'As far as I am concerned it is good that they are there, because I couldn't travel without them.'

(75+, vision and mobility)



The importance of Passenger Assist to the passenger and the difference it makes in terms of enabling them to make a journey means there are huge implications of Passenger Assist not working well. Firstly, passengers who have a bad experience when travelling using Passenger Assist may choose not to travel by train in future if the service has not met their needs or expectations, or in extreme cases not allowed them to complete their journey as planned, or indeed at all. A positive experience for Passenger Assist users is crucial in building their trust and confidence in the service.

Secondly, there is also an implication for train companies providing assistance if Passenger Assist does not deliver the outcomes the passenger expects. For train companies there is the potential for lost revenue as passengers may choose either not to travel or choose to avoid travelling with train companies who don't provide Passenger Assist to a high standard. The potential for lost revenue is heightened as the majority of passengers using Passenger Assist are travelling for leisure and thus many journeys using Passenger Assist are optional. In more serious cases where Passenger Assist users have a particularly poor level of service, such as a passenger being put on the wrong train or missing their stop because of an assistance failure, then it can also have significant reputational repercussions for the company responsible for the assistance.

Overall, it is therefore clear that the significance and importance of Passenger Assistance working well for both passengers and the industry means it must be closely monitored to ensure that it is delivering the level of service and outcomes that are intended.

'It is important that I am able to do anything independently. It is less stressful getting the train than it is trying to drive or having to arrange lifts. I am trying very hard to remain independent.'

(35-49, mobility and mental health)

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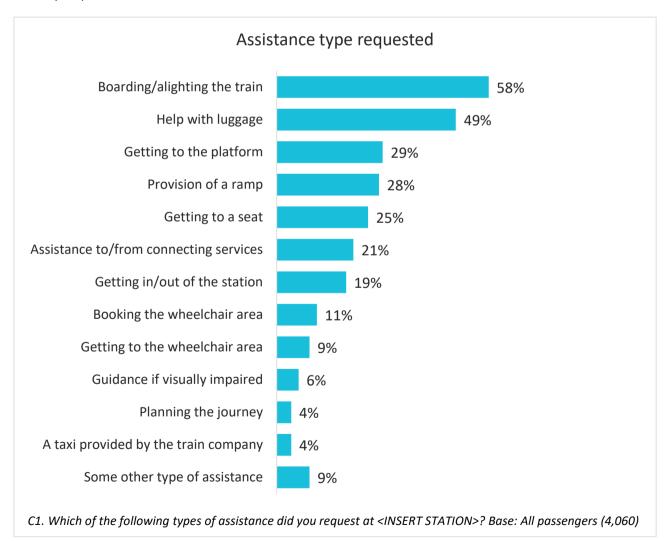


#### 7. What assistance are passengers booking?

#### Type of assistance booked

When booking assistance, passengers are able to request a range of different types of assistance. While there is no centralised record of the mix of assists, the interview data allows us to make reliable inferences about the mix.

The most common types of assistance booked are those which are most general, and therefore not linked to different disability types or conditions. The most common type of assistance booked is help boarding or alighting the train (58 percent), followed by help with luggage (49 percent). Getting to the platform and provision of a ramp are also booked by over a quarter of those using Passenger Assist (29 percent and 28 percent respectively). A much smaller proportion of passengers book the on-train wheelchair area or assistance getting to the wheelchair area (11 percent and nine percent respectively), and only six percent request guidance because they are visually impaired.



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Booking provision of a ramp is highest as a proportion of all those requiring Passenger Assist for younger passengers (57 percent aged 16-24 and 54 percent aged 25-34). Booking this type of assistance decreases as a proportion as age increases with just over one in ten (13 percent) of those aged 75 or older booking this type of assistance.

In a similar fashion, a greater proportion of 16-24 year olds and 25-34 year olds using Passenger Assist book guidance because they are visually impaired (15 percent and 14 percent respectively). Booking this type of assistance decreases in relative importance as age increases with only a small proportion of those aged 75 or older using Passenger Assist booking guidance because they are visually impaired (four percent). In contrast, booking help with luggage is highest as a proportion of all assists for older passengers (62 percent aged 75 or older and 53 percent aged 65-74).

This confirms that amongst older users of Passenger Assist it is not just those with physical disabilities and vision or hearing impairments who require help accessing the rail network, but a much wider group, including many passengers who require assistance with particular parts of the journey.

There are no clear trends linking the type of assistance booked and the disability that passengers have. This could be because the nature of disability is that it is completely unique to each individual so two people with the same overall disability category, such as a physical disability, may require completely different assistance based on their needs. In addition, many passengers have multiple disabilities, making it difficult to identify which disability is driving the type of assistance booked.

However, there are some differences in the assistance booked depending whether it is the passenger or a travel companion booking the assistance. More passengers than travel companions book help with luggage (52 percent and 38 percent respectively) and assistance to or from connecting services (22 percent and 19 percent respectively). This could indicate that when a passenger is travelling with a companion, there are some things that the companion will help with rather than depending on rail staff.

Conversely, more companions than passengers book provision of a ramp (43 percent and 24 percent respectively), the wheelchair area itself (15 percent and 9 percent respectively), and assistance getting to the wheelchair area (12 percent and 8 percent respectively). We hypothesise that this is because passengers needing wheelchair assistance are more likely to travel with a companion than other Passenger Assist users, meaning that a greater proportion of assists booked by companions would require wheelchair assistance.

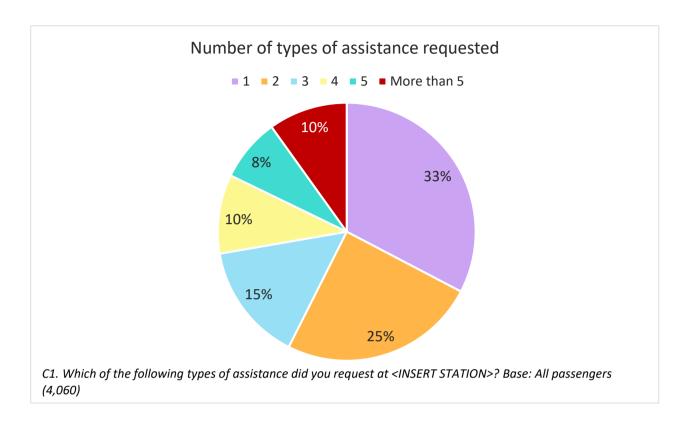
#### Number of types of assistance booked

A third of passengers (33 percent) book one type of assistance, a further quarter (25 percent) book two types of assistance, and the remaining passengers book at least three types of assistance. The average number of assists booked per station is 2.62. Note that this data relates to the assistance required at a single station; therefore the total number of assists requested on a typical journey will be a multiple of these numbers. For example, this suggests a journey from Glasgow Central to York via a change at Edinburgh Waverley could, on a routine basis, reasonably involve around five to six different types of assistance being required overall to complete the journey in each direction.

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There are no significant differences by whether a passenger or companion made the booking, or the passenger's age, disability type or condition or day of the week when they travelled, in the number of types of assistance booked.

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#### 8. Experience of booking Passenger Assist

#### How do people book?

Passenger Assist can be booked by telephone, by email or via the web and booking records from the RDG show that the most common method for booking Passenger Assist is via telephone. Consistent with this, the majority of the people we interviewed booked via the telephone (82 percent) whilst around one in ten (12 percent) booked via email and a small proportion booked via the web (six percent).

#### Whether received confirmation of the booking and the information included

The majority of passengers (82 percent) receive confirmation of the assistance booking, but just over one in ten (12 percent) do not. The proportion receiving a confirmation when booking by email (87 percent) is significantly higher than the proportion making a booking by phone (81 percent).

'I think it took me a while to actually find the website, but having found it the actual booking process is very simple. The first time I used the service I did ring up to confirm a couple of things. Ringing up was very straightforward and people were helpful.'

(65-74, mobility)

'When I booked it online, I didn't receive a booking confirmation so I rang up and they said that it hadn't gone through so I then had to re-book it. It has happened in the past as well and 9/10 times the booking will not have been confirmed.'

(35-49, mobility)

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For the vast majority who receive confirmation, the information is correct (97 percent), and there is no significant difference by mode of booking for whether the information included is correct.



A small number of those who received a confirmation do not receive information about <u>where</u> to meet the staff member (4 percent) and the same proportion do not receive information about when to meet the staff member.

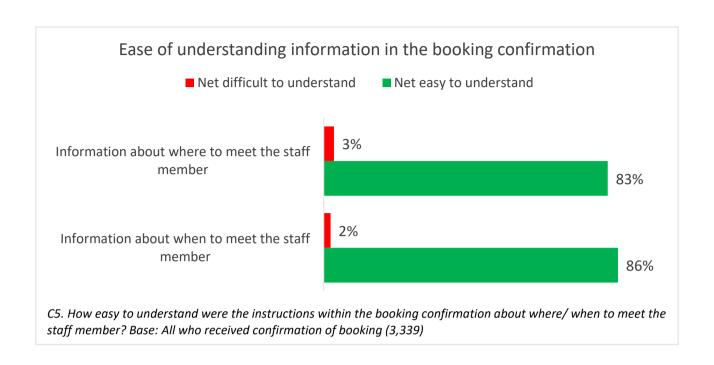
#### Ease of understanding information in confirmation

A large majority of those who receive a booking confirmation find the information about when and where to meet staff easy to understand.

Information about where to meet the staff member is easier to understand when the booking has been made via web (87 percent) than when the booking is made by email or phone (80 percent and 84 percent respectively). The difference between the web and email scores is statistically significant. There is also a difference in the proportion saying the information is <u>very</u> easy to understand (66 percent for those booking by email and 71 percent for both those booking by telephone or web). In this case the difference between the phone and email scores is statistically significant.

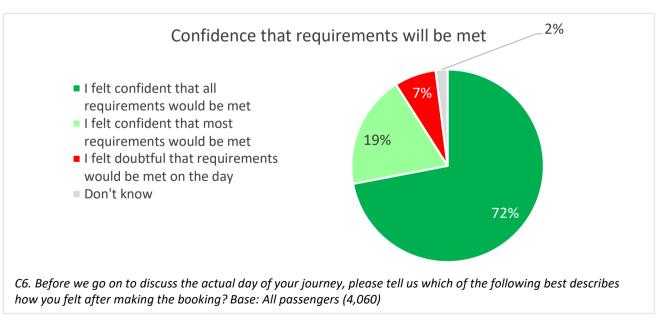
There is very little difference between booking modes in the proportion saying that information on when to meet staff is easy to understand (the scores are 85 percent or 86 percent for all three modes of booking). However, there is a difference in the proportion saying the information is very easy to understand; 68 percent for those booking by email, 71 percent for those booking by web and 73 percent for those booking by telephone. Again the difference between the phone and email scores is statistically significant.





#### How confident is the passenger after making their booking?

Anecdotal comments from Passenger Assist users suggest that confidence that their requirements will be met is important to their overall experience of the journey. Almost three quarters (72 percent) are confident after booking that their requirements will be met on the day they travel. Of the remainder, a fifth (19 percent) are confident that some requirements will be met whilst a small proportion (7 percent) are doubtful that their requirements will be met.





The proportion booking by email who felt confident that all requirements would be met (69 percent) is lower than the other two modes of booking. Whilst this is not statistically significant, it is consistent with the results in the previous section so the result is noteworthy.

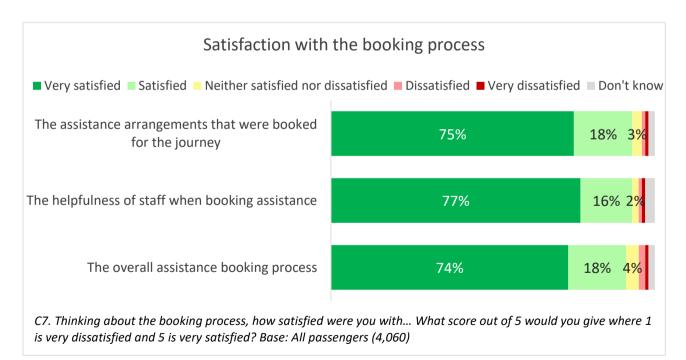
Older passengers are more confident than younger passengers that their requirements will be met. Those who are most confident are aged 75+ (79 percent) and 65-74 (73 percent) whilst those with least confidence are aged 25-34 (54 percent). Passengers with a hidden disability have least confidence that their requirements will be met; 13 percent are doubtful their requirements will be met on the day.

'The assistant was very patient with me as it was the first time I had used the service, he made sure the journey details were correct and exactly as I had given to him. At unmanned stations he arranged for the conductor to leave the train and take our luggage on to the train and find seats for myself and my wife when I had not expected any assistance could be possible. A first class service is how we described it.'

(75+, hearing and another long-term condition)

#### Satisfaction with the booking process

Approximately nine in ten passengers are satisfied with the booking process and three quarters are very satisfied. Satisfaction with the helpfulness of staff is highest, with 77 percent very satisfied; whilst 75 percent are very satisfied with the assistance arrangements for the journey and 74 percent are very satisfied with the overall assistance booking process.





Passenger comments indicate that satisfaction with the booking process is linked to the helpfulness of staff when booking.

'It was easy to book and staff are always helpful and clear on phone, our names were on the list and they knew exactly what is needed and where it is needed and it makes it less stressful and easier to travel.'

(50-64, mobility)

'The member of staff was knowledgeable and arranged a different coach for me as it would have been easier for me as the table lifted giving me more room - this made me feel great.'

(65-74, hearing, mobility and another long-term condition)

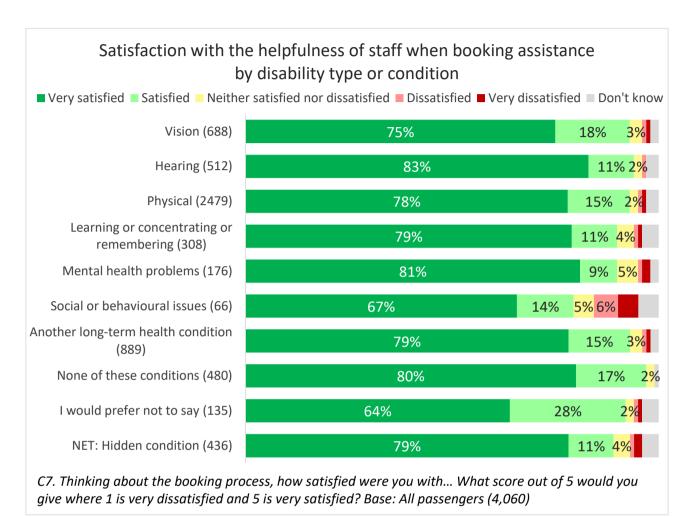
Whilst there is no difference in overall satisfaction by mode of booking, the scores for the helpfulness of staff when booking assistance and satisfaction with the assistance arrangements for the journey are slightly lower for those booking by email (when compared to those booking by phone or web). However, since the scores in question are 90 percent and 91 percent respectively there is no evidence that booking by email is more problematic than booking by phone or web.

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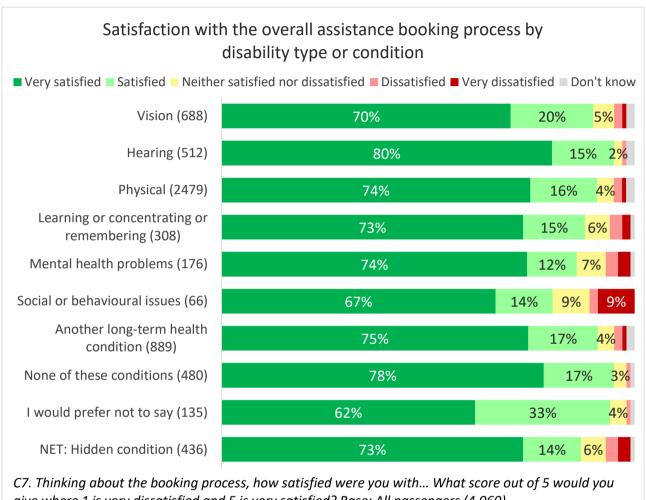


Satisfaction with the helpfulness of staff when booking assistance is significantly lower for those with a hidden condition compared to overall (90 percent compared to 93 percent).





The differences by disability type or condition in overall satisfaction with the booking process follow the same trend as the helpfulness of booking staff. The difference in overall satisfaction with the booking process for those with a hidden condition compared to the overall average is statistically significant (88 percent compared to 92 percent).



give where 1 is very dissatisfied and 5 is very satisfied? Base: All passengers (4,060)

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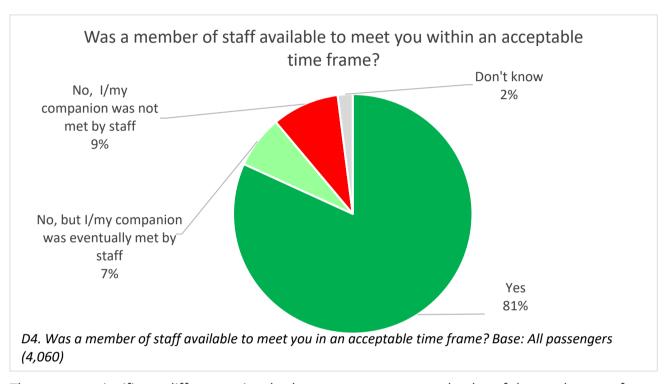


#### 9. Experience on the day of travel

#### Whether met by staff at the station

Just over four in five passengers (81 percent) are met in what they consider is a reasonable timeframe, and a further seven percent are met eventually by staff.

Whilst almost one in ten (nine percent) passengers are not met by staff, even the majority of this group are able to continue the journey (see journey leg completion later in this chapter).



There are no significant differences in whether passengers are met by day of the week, type of assistance or disability type or condition. More passengers who booked via the phone are met by staff than passengers who booked via the web (82 percent and 76 percent respectively).

'They were there waiting for me. I was very happy and felt confident that I was being looked after - this is important as I have never travelled that length of journey on my own before and as I have heart problems I didn't want to feel fearful on the journey.'

(65-74, mobility and another long-term condition)

'I just stood on the platform. It was really very frightening, but somebody [a member of the public] came out of the crowd to hold my hand to get me down off the train and said 'Welcome to Edinburgh'. I thanked her profusely.'

(75+, vision and mobility)



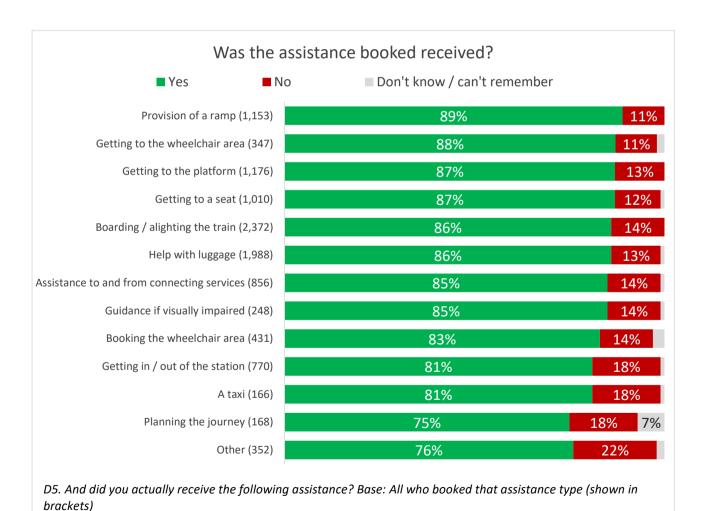
#### Whether booked assistance was received by type of assistance

The vast majority of assistance booked is received; for the assistance types most commonly booked, boarding or alighting the train and help with luggage, 86 percent of those who booked this assistance received it.

Planning the journey is the only assistance type received by fewer than 80 percent; 75 percent of those who booked it received this assistance. However, anecdotal comments suggest that the ambiguous nature of this assist category (compared to say, provision of a ramp) may have affected this result.

In general there are no significant variations by mode of booking, the exception is provision of a ramp where only 76% of those booking by web received the assistance compared to 89% of those booking by phone and 92% of those booking by email.

There are only small differences by the day of the week the journey was made, with the exception of help getting in/out of the station. People travelling at the weekend (87 percent) are more likely than people travelling in the week (79 percent) to have received this type of assistance.



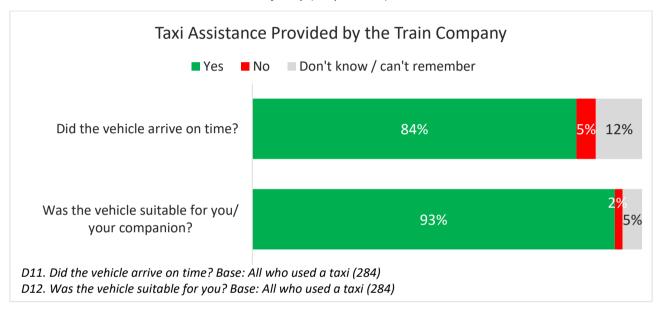
Date Last Edited: 13 November, 2017



#### **Provision of Alternative Accessible Transport**

Train and station operators are also obligated under the requirements of their DPPP to provide Alternative Accessible Transport (AAT) to passengers, which is usually in the form of an accessible taxi, as an alternative mode of transport for the passenger in a situation where the station they intended to travel to or from was inaccessible to them. For example, if a passenger is a wheelchair user and the station they want to travel to or from has no step-free access to the platform and the station lift is out of order, then AAT could be provided to take the passenger to the nearest or most convenient accessible station to allow them to continue their journey.

For the majority of passengers who booked AAT the vehicle arrived on time (84 percent). The vehicle was also suitable for the vast majority (93 percent).



'A man was there waiting for me, I'd broken my wrist and he carried my bags all the way to the taxi and saw me get in the taxi OK.'

(50-64, another long-term condition)

'Myself and my colleague had two severely disabled people in wheelchairs. Our luggage was loaded onto a vehicle which drove off quickly with them and we were left running behind unable to keep up and not knowing where we were going.'

(50-64, mobility and mental health)

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#### Was all the assistance booked received?

As noted above, many passengers book multiple types of assistance, even at the same station. Eight in ten passengers (81 percent) receive all the assistance they have booked, whilst slightly over one in ten (12 percent) receive none of the assistance.



There are no significant differences in whether booked assistance is received between Network Rail Fully Managed and Managed Light stations, by day of the week, type of assistance or passenger type.

Similar to satisfaction with the booking process, there are small differences by disability type or condition for whether the assistance booked is received. All assistance received is highest for people with a physical disability (81 percent), followed by people with a vision or hearing impairment (79 percent for both), and lowest for people with a hidden condition (75 percent). The lower proportion of people with a hidden condition receiving all the assistance they booked is statistically significant. This could indicate a challenge around providing assistance for those with less visible disabilities.



There are small variations by mode of booking in whether assistance is received. The greatest proportion receiving the assistance they have booked is amongst those booking by phone (81 percent), with email slightly lower (80 percent) and web lowest (77 percent).

'The staff were two steps ahead of me. They knew where I wanted to be and what carriage number to go on and I didn't have to look. They took care of me all the time which I am very grateful for.'

(65-74, mobility and mental health)

'The guy who helped me didn't follow the service all the way through as he helped me get off the train, but didn't actually help me with my bags.'

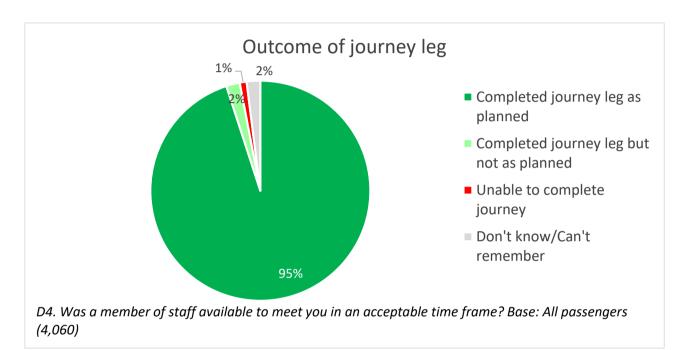
(75+, mobility)



#### Journey leg completion

In addition to asking whether staff met the passenger and if they received their assistance, passengers were also asked whether they were able to complete their journey. By combining this with the data on whether passengers were met by staff, this allows us to measure the proportion of those using Passenger Assist able to complete their journey leg.

The majority (95 percent) are able to complete their journey leg as planned and further small number are able to continue their journey, but not as planned (two percent). Just one percent are unable to continue their journey. There are no differences by whether travelling in the week or at the weekend, type of disability or age in the outcome of the journey leg.



'Certainly at Euston when we arrived late and had missed the train, they were all over it in terms of changing the booking, changing the Passenger Assist booking and letting Runcorn know, calming us down and saying "We will get you on the next train and it is no problem.'

(65-74, mobility)



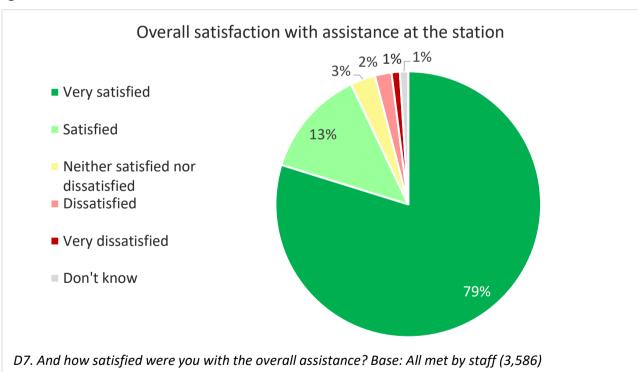
# 10. Satisfaction with Passenger Assist received on journey measured

#### Overall satisfaction with assistance at the station

It is important to note that satisfaction with Passenger Assist received on the journey measured was not asked to everyone booking assistance, but asked only those who were <u>met by staff</u> (88 percent). Whilst it could be inferred that those not met by staff were dissatisfied with the assistance at the station as they did not receive what they had booked, this conclusion cannot be confirmed as they were not asked the questions.

The vast majority of passengers who receive assistance are satisfied with it: just over nine in ten (92 percent) are satisfied with the assistance they received; 79 percent are very satisfied; and 13 percent are satisfied.

There are no differences by the day of the week (weekday and weekend are both 92 percent satisfied), and only small differences by whether the person we spoke to is a passenger or a companion (passenger = 92 percent, companion = 93 percent) and mode of booking (phone = 93 percent, email = 90 percent, web = 93 percent). Moreover, these differences are not statistically significant.



'They were polite and helpful. We thought we missed our train, but they told us you can get on another train. They made sure the assistance was there. They rang all the way through. They made sure it was there waiting.'

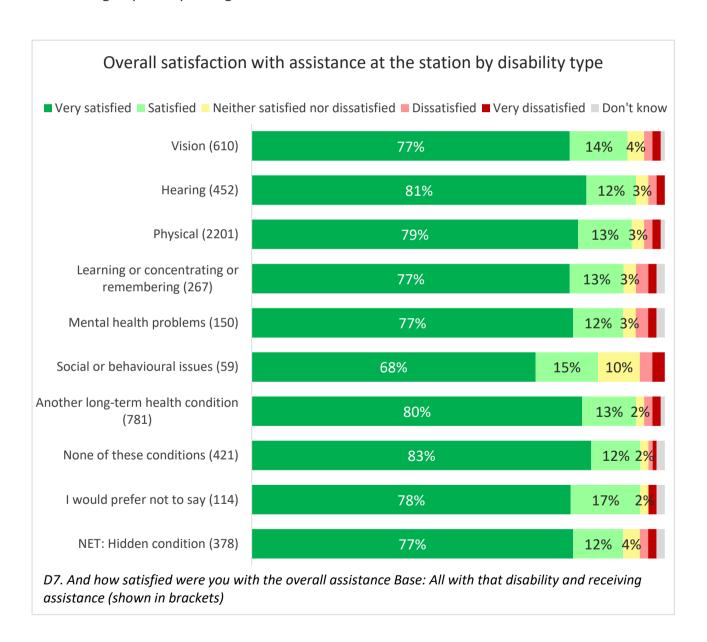
(50-64, another long-term condition)



'The help I requested did not happen. They took my luggage onto the train but just left it so another passenger had to put it in the correct space and they did not have time to put me into my seat.'

(50-64, vision and another long-term condition)

Satisfaction amongst those with social or behavioural issues is noticeably lower (83 percent satisfied and 68% very satisfied) than for other groups. There are no other notable differences by disability type or condition and no other group is less than 77% very satisfied, including the combined group of all passengers with hidden conditions.



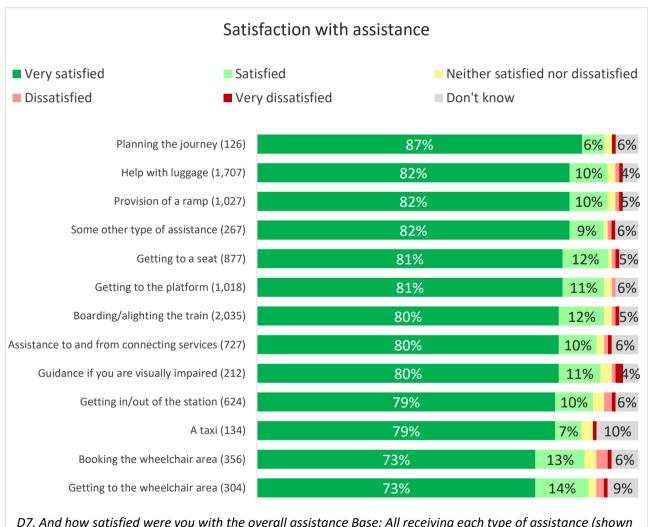


### Overall satisfaction for each type of assistance booked

The majority of those who receive each type of assistance are happy with it. Of the most common types of assistance in terms of the number of passengers booking them, just over eight in ten are very satisfied with help with luggage and provision of a ramp (82 percent for each), and getting to a seat and getting to the platform (81 percent for each).

Despite the relatively low proportion receiving help planning the journey, this is the assistance type passengers are most satisfied with (87 percent are very satisfied). The lowest levels of satisfaction are for booking the wheelchair area and getting to the wheelchair area (73 percent for each). All the remaining types of assistance receive a score of either 79% or 80% satisfied.

There are no differences by disability type or condition in satisfaction with different types of assistance.



D7. And how satisfied were you with the overall assistance Base: All receiving each type of assistance (shown in brackets)



#### Satisfaction with staff at the station

The majority of passengers who are met by staff are very satisfied with the staff providing Passenger Assist. Satisfaction is highest for the helpfulness and attitude of staff who provided assistance at the station with over nine in ten satisfied (81 percent very satisfied and a further 13 percent satisfied).

Satisfaction with the helpfulness of staff who provided assistance at the station differs only slightly by disability type or condition; from 94 percent of people with a vision impairment to 92 percent of those with a hearing impairment or hidden condition.

'The majority of them are very professional. They come across as, they genuinely want to help, they see someone less fortunate than themselves and they are there to help. They normally speak to Ruth [the person being assisted], which is very important, a lot of people ignore looking at or speaking to the person in the chair this is good thing to have in that job.'

(35-49, mobility, mental health and another long-term condition)

'Greeted with a welcoming good morning. Ramp provided and the lady told us where to stand on platform for my coach. I used the ramp and the Staff took great care to make sure I felt safe.'

(65-74, hearing and another long-term condition)

'I had been sitting waiting and waiting and waiting and then he had said 'Hurry up, we have got to go'. The one thing I can't do is hurry.'

(75+, vision and mobility)

Satisfaction levels for how well the staff understood each passenger or companion's particular needs are slightly lower (78 percent very satisfied and a further 14 percent satisfied). The variation in scores on this attribute between different groups of passengers is similar to that for the helpfulness of staff; from 93 percent of people with a long-term condition but not a disability to 90 percent of those with a hidden condition.

Amongst the Network Rail managed stations, there is no significance difference between Fully Managed and Managed Light stations on the two ratings concerning staff at the station.

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Date Checked: 13/11/2017

# **BREAKING BLU**



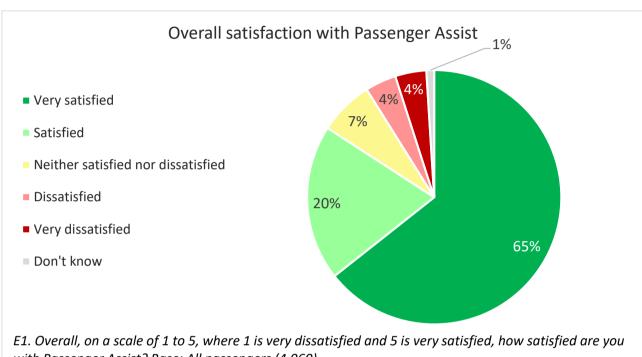
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# 11. Overall satisfaction with Passenger Assist, staff and station facilities

### **Overall satisfaction with Passenger Assist**

Overall satisfaction with Passenger Assist based on all past usage is slightly lower than satisfaction with the journey measured. Almost two thirds (65 percent) are very satisfied and a further 20 percent are satisfied.



with Passenger Assist? Base: All passengers (4,060)

'I would say I am very satisfied with it because when you go into the office or the lounge they treat you as a person and not as just someone who needs a lift down. You can have a laugh and a joke with the people behind the counter. Once you start going regularly, they recognise you and you can have a laugh with them.'

(35-49, mobility and mental health)

'Sometimes you will have a miracle journey where everything has gone reasonably okay, but a lot of the time it is degrading to a certain extent.'

(16-24, mobility and another long term condition)

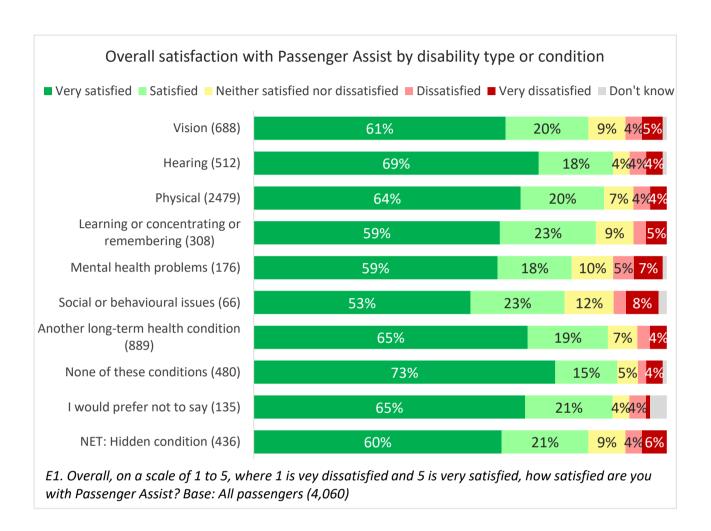
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Overall satisfaction ranges from 87 percent of people with a hearing impairment satisfied to 81% percent of those with a vision impairment or a hidden condition. The lower satisfaction scores for those with vision impairment or a hidden condition are significant.

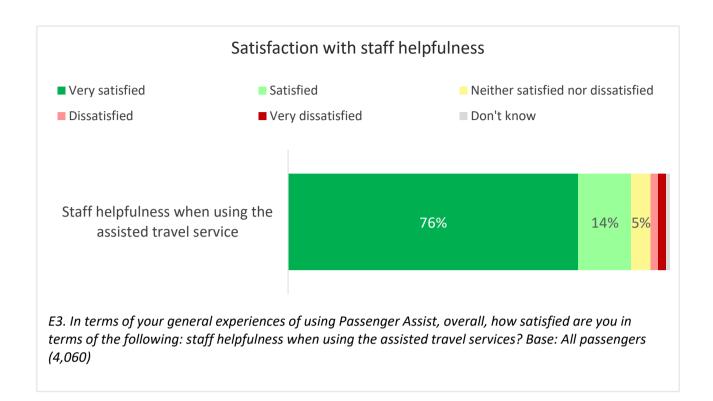


#### Satisfaction with staff

Anecdotal evidence is that alongside confidence that their booked arrangements will be fulfilled, the quality of service from front-line staff is a key aspect of the passenger experience. Although we cannot prove a causal relationship between the two, there is a strong correlation between overall satisfaction and satisfaction with staff helpfulness when using the assisted travel service. Almost all the passengers who were satisfied overall (97 percent) were satisfied with staff helpfulness, compared to just over one-third (35 percent) of those who were dissatisfied overall.

Compared to overall satisfaction, a greater proportion are satisfied with the staff helpfulness when using the assisted travel service; 76 percent are very satisfied with this and a further 14% satisfied. There are no differences between whether passengers are travelling during the week or at weekends, or between passengers and companions.





'Everybody is very friendly. You can't tip people today on the railway so I usually take a packet of biscuits so they can have a cup of tea with them because they are so, so good.'

(75+, mobility)

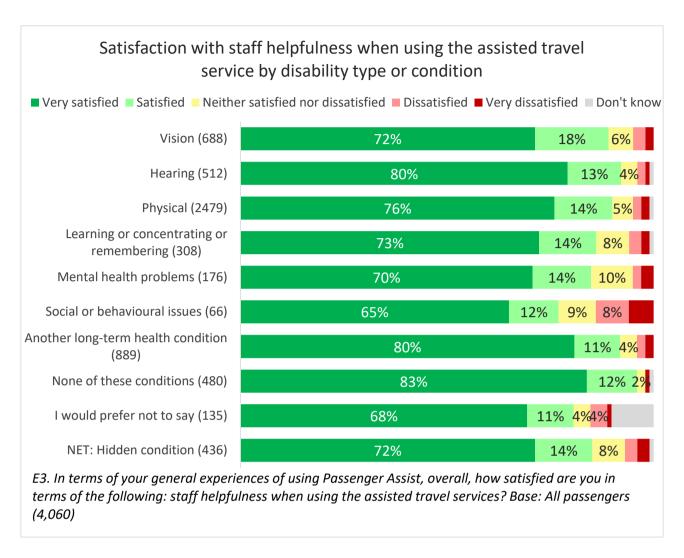
'You never feel like you are an inconvenience. You never feel that they are thinking 'Oh, I got to do that again'. Everybody is really lovely.'

(35-49, mobility and mental health)

The range of scores by disability type or condition is similar to that for overall satisfaction; ranging from 92 percent of those with a hearing impairment to 86 percent of those with a hidden condition. Passengers with a hidden condition are significantly less satisfied than the overall sample with staff helpfulness when using the assisted travel service (86 percent vs 90 percent respectively).

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#### Satisfaction with station facilities

The majority are satisfied with station facilities (83 percent). However, this is a lower proportion compared to satisfaction with the staff and the proportion who are very satisfied is sharply lower (59 percent compared to 76 percent).

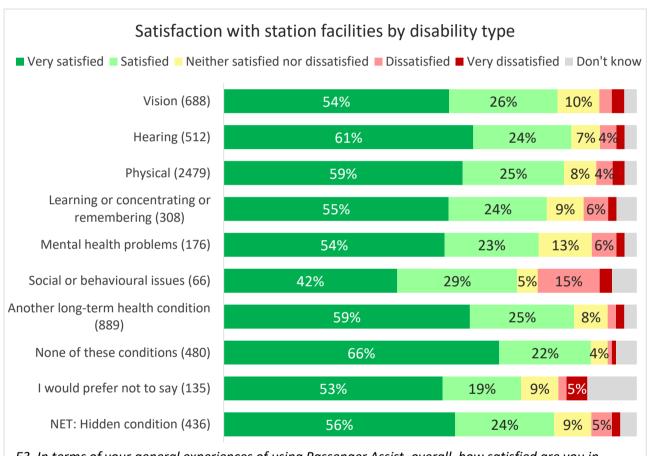




'Ramp wasn't ready, they had six wheel chairs to get on two separate areas and no ramps, wasn't good, lucky train was late.'

(16-24, another long-term condition)

There are small differences in satisfaction with station facilities by the day of the week (weekday = 83 percent, and weekend = 85 percent) and whether the person we spoke to is a passenger or a companion (passenger = 83 percent, companion = 85 percent). Passengers with a hidden condition (80 percent) or a vision impairment (81 percent) are significantly less satisfied with station facilities than the overall sample (84 percent).



E3. In terms of your general experiences of using Passenger Assist, overall, how satisfied are you in terms of the following: station facilities suitable for my needs? Base: All passengers (4,060)

Date Last Edited: 13 November, 2017



# 12. Conclusions and potential improvements to Passenger Assist

#### **Conclusions**

The research found that Passenger Assist plays a crucial role in making rail travel accessible, with two thirds of those using Passenger Assist stating they would not have been able to travel without it. Passengers book a range of different assistance types, and the majority of passengers book more than one type of assistance. The most commonly booked assistance types are help boarding or alighting the train, followed by help with luggage.

The booking process works well and the majority receive a confirmation of their booking. For those who receive a confirmation, in almost all instances the information is correct. Not surprisingly given this, satisfaction with the booking process is high with approximately nine in ten passengers satisfied and three quarters very satisfied. The main concern is that despite the high satisfaction with the booking process, only three quarters of passengers are confident after booking that all their requirements will be met. Anecdotal evidence suggests that a lack of confidence in the booking arrangements can affect the quality of passengers' journeys, regardless of whether the assistance is eventually received.

Around four in five passengers are met by staff within what they consider an acceptable time frame. For those either met by staff late or not at all, only a very small proportion are unable to complete their journey.

Given that many passengers book multiple types of assistance, even at the same station, possibly the next most important metric is that passengers receive <u>all</u> the types of assistance booked. Eight in ten passengers receive all the assistance they have booked, whilst slightly over one in ten receive none of the assistance. Considering the individual types of booked assistance, the majority of those booking each type of assistance receive it (all types of assistance except planning the journey are received by at least eight in ten of those booking).

Anecdotal evidence suggests that the apparent inconsistency between these failure rates (between one in ten and one in five) and the very small proportion of passengers not completing their journey is due to being helped onto a later train by staff members, the passengers managing themselves or fellow passengers assisting them.

When assistance is received, passengers are satisfied with the quality of assistance. This high overall satisfaction is consistent with satisfaction for the different assistance types. Levels of satisfaction are also high across all sub-groups of passengers, although there is some evidence of lower satisfaction amongst those with hidden conditions.

Satisfaction with staff is high generally, and the vast majority are satisfied with the helpfulness and attitude of staff who provided assistance at the station and that staff understand their needs. Levels of satisfaction are high amongst all sub-groups of passengers and there is no evidence of other significant variations such between different types of station or different days of the week travelled.

Date Checked: 13/11/2017



Overall satisfaction with Passenger Assist based on all past usage is slightly lower than satisfaction with the journey measured, although almost two thirds are very satisfied. Satisfaction with staff is higher than overall satisfaction but is very strongly correlated with overall satisfaction (supporting anecdotal comments from passengers that this is a key aspect of the service).

Whilst the majority of passengers are satisfied with station facilities, the proportion who are very satisfied is markedly lower than the equivalent proportion for satisfaction with the staff.

# **Passenger suggestions for improvement**

At the end of the interview, passengers were asked to make suggestions about how Passenger Assist could be improved. Suggestions are wide-ranging, but some clear themes could be identified.

- Firstly, staff training and communications. Some passengers feel that staff do not have enough knowledge to adequately help them and find that they are giving guidance to staff on what they need to do. In particular, passengers suggested training more staff to understand the complexity of different disabilities and that passengers often need extra time and assurance that they are going to make their connection. Passengers would also like reassurance that once they are on a train they will be met at the next station and receive the assistance they requested.
- There is also some appetite for <u>revisions to the booking system</u>. In theory the booking database remembers the details from previous bookings, but at least some passengers feel they are being unnecessarily asked to reconfirm details.
- Reassurance that <u>passengers will be met by staff</u> contributes to the journey experience and is
  especially important during times of disruptions. Passengers suggest that providing text
  confirmations on the day of travel would improve this aspect of the service.
- Another area where passengers suggest improvement is <u>the arrangements upon arrival</u> at the station. Passengers who have arrived via taxi would like to be met at the taxi rank rather than needing to make their way into the station without assistance. Passengers would also like it to be clearer which staff are the Passenger Assist staff and notified where they will be.
- Other suggestions include policing the wheelchair areas on trains to keep them free of luggage and providing more accessible toilets both on trains and at stations.

#### Potential actions for the ORR and the rail industry

To improve reliability, monitoring performance by using a metric of journeys unable to be completed due to Passenger Assist failures is impractical because it is too small a proportion of assists. It also ignores the fact that even when passengers are not met as planned, assistance from other staff members or fellow passengers may allow them the complete the journey.

Date Checked: 13/11/2017



Instead, since many passengers are booking multiple assists and they need all of these to work to continue their journey, we recommend a metric measuring whether all the booked assists have occurred should be used to monitor performance. In addition, satisfaction targets around overall satisfaction, staff helpfulness, and station facilities would provide clearly understandable measures which could enable comparison across SFOs and identify areas for improvement.

Satisfaction targets for the weakest individual assist categories might also be justified, but there may not be enough graduation on the percentage satisfied for this approach work (the percentage very satisfied seems a better discriminator here).

Beyond these basic reliability measures, there are a number of improvements to the service which would enhance passengers' experience. Staff training needs to be deepened and broadened, and communications skills improved; users want staff to better understand the complexity of disabilities and appreciate challenges each person faces. Staff understanding that passengers, who are often anxious, need extra time and assurance is important. People with hidden disabilities reported lower satisfaction and poorer outcomes across a number of end-to-end metrics so this should be a particular area of focus.

Station facilities are seen as considerably less satisfactory than other aspects of the journey. Passengers ultimately want to be less dependent on assistance and in the longer term more accessible stations and trains will enable that.

Gathering regular qualitative feedback from passengers about how things are working and suggestions for improvement will allow passengers to feel part of the development of Passenger Assist. This is particularly important given an aging and changing population, as Passenger Assist needs to adapt with this to ensure it is meeting the needs of passengers. One way to facilitate this would be to create a "passenger panel" of users of the service. This approach is proven since many TOCs have similar customer panels in place and we believe TfL has an equivalent panel amongst its passengers requiring assistance.

Date Last Edited: 13 November, 2017

# **BREAKING BLUE**

# Appendix 1 – Margins of error crib sheet

SFO	No. of interviews	Answer = 50%	Answer = 70%	Answer = 90%
Network Rail	1,159	+/-2.9%	+/-2.6%	+/-1.7%
Great Western Railway	454	+/-4.6%	+/-4.2%	+/-2.8%
Virgin Trains West Coast	396	+/-4.9%	+/-4.5%	+/-3.0%
Virgin Trains East Coast	437	+/-4.7%	+/-4.3%	+/-2.8%
South West Trains	170	+/-7.5%	+/-6.9%	+/-4.5%
ScotRail	206	+/-6.8%	+/-6.3%	+/-4.1%
Arriva Trains Wales	215	+/-6.7%	+/-6.1%	+/-4.0%
East Midlands Trains	169	+/-7.5%	+/-6.9%	+/-4.5%
Govia Thameslink Railway	155	+/-7.9%	+/-7.3%	+/-4.8%
Northern	131	+/-8.6%	+/-7.8%	+/-5.1%
London Midland	185	+/-7.2%	+/-6.6%	+/-4.3%
Greater Anglia	115	+/-9.1%	+/-8.4%	+/-5.5%
TransPennine Express	108	+/-9.4%	+/-8.6%	+/-5.7%
Southeastern	90	+/-10.3%	+/-9.5%	+/-6.2%
Chiltern Railways	39	+/-14.2%	+/-13.0%	+/-8.5%
Other SFO	31	-	-	-
TOTAL	4,060	+/-1.5%	+/-1.4%	+/-0.9%



# Appendix 2 – Key metrics by SFO and disability type or condition

Satisfaction and assistance received by SFO (proportion satisfied or very satisfied)

SFO	Satisfaction with booking (C7)	All assistance received (D5)	Satisfaction with assistance at station (D7)	Overall satisfaction (E1)
Network Rail	92%	82%	92%	85%
Arriva Trains Wales	93%	73%	87%	84%
Chiltern Railways (small sample)	87%	87%	100%	85%
East Midlands Trains	90%	73%	90%	79%
Govia Thameslink Railway	86%	79%	93%	75%
Great Western Railway	94%	81%	93%	88%
Greater Anglia	93%	77%	91%	84%
London Midland	90%	77%	93%	88%
Northern	92%	73%	85%	82%
ScotRail	90%	81%	96%	85%
South West Trains	93%	76%	91%	82%
Southeastern	82%	78%	85%	71%
TransPennine Express	92%	85%	92%	88%
Virgin Trains East Coast	92%	87%	96%	91%
Virgin Trains West Coast	95%	84%	93%	86%
TOTAL	92%	81%	92%	85%

# **BREAKING BLUE**

# On-station metrics by SFO (proportion satisfied or very satisfied)

SFO	Staff helpfulness (E3)	Station facilities (E3)	Overall satisfaction (E1)
Network Rail	91%	84%	85%
Arriva Trains Wales	88%	79%	84%
Chiltern Railways (small sample)	87%	85%	85%
East Midlands Trains	86%	81%	79%
Govia Thameslink Railway	84%	71%	75%
Great Western Railway	94%	85%	88%
Greater Anglia	90%	83%	84%
London Midland	87%	82%	88%
Northern	88%	80%	82%
ScotRail	95%	85%	85%
South West Trains	85%	81%	82%
Southeastern	76%	72%	71%
TransPennine Express	94%	90%	88%
Virgin Trains East Coast	94%	88%	91%
Virgin Trains West Coast	90%	88%	86%
TOTAL	90%	84%	85%



# Key metrics by disability type or condition (proportion satisfied or very satisfied or proportion receiving all assistance)

Disability type or condition	All assistance received (D5)	Satisfaction with booking (C7)	Satisfaction with assistance at station (D7)	Overall satisfaction (E1)
Vision (blindness or visual impairment)	79%	91%	91%	81%
Hearing (deafness or hard of hearing)	79%	95%	92%	87%
Physical (wheelchair user, mobility issues, amputee, dwarfism)	81%	91%	92%	84%
Learning or concentrating or remembering	75%	88%	90%	82%
Mental health problems	73%	86%	89%	77%
Social or behavioural issues	70%	80%	83%	76%
Another long-term health condition that doesn't fit any of the above	80%	91%	93%	85%
None of these conditions	82%	95%	95%	89%
Prefer not to say	79%	95%	95%	87%
TOTAL	81%	92%	92%	85%



# Appendix 3 – Questionnaire

#### Introduction

Good morning/afternoon/evening. My name is \_\_\_\_\_\_ from **Breaking Blue**. We are a professional research company working with the Office of Rail and Road (ORR). ORR is the independent regulator of the railways, this means they check services are being provided to passengers to sufficient standards.

We understand from the rail industry that you recently booked assisted travel. ORR would like to know more about your recent experience of using the assisted travel service to help them understand how well it is working for passengers.

Before we continue – can I just confirm that you are over 16?

YES, 16 OR OVER - CONTINUE; NO, UNDER 16 - THANK AND CLOSE

And can you please confirm that you booked assisted travel recently?

YES, BOOKED ASSISTED TRAVEL - CONTINUE; NO, NOT BOOKED - THANK AND CLOSE

IF ASK HOW GOT THEIR CONTACT DETAILS: Your details were passed on by the company you made the booking with. You were asked at the time of booking whether you were willing to participate in research for ORR.

Would you have some time now to answer some questions? The interview will take approximately 15 minutes.

IF YES: Thank you very much for your valuable time. We will refer to the assisted travel service as Passenger Assist throughout the questionnaire.

We guarantee that your answers will be kept completely confidential, and will be used for research purposes only. This interview is being conducted within the Code of Conduct of the Market Research Society.

IF WOULD LIKE MORE DETAIL: The MRS set out professional standards that all research practitioners must prove they work to. If you would like to contact MRS with any questions you can do so on 0500 396999.

IF NO: Is there a better time to call you back?

IF YES: INTERVIEWER ARRANGE TIME

IF NO: You can complete the interview online within the next week, and the link is: INSERT WEBLINK

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#### **Section A: Travel Habits**

We would like to start by gathering some background information on your train travel habits.

#### **ASK ALL**

A1 Have you used Passenger Assist, either on your own or as a companion accompanying someone requiring the service?

#### SINGLE CODE

1. Yes (myself)	CONTINUE AS CUSTOMER
2. Yes (companion)	CONTINUE AS COMPANION
3. No	THANK AND CLOSE

4. Don't know THANK AND CLOSE

#### **ASK IF A1 = 2 (COMPANION)**

A2 What is your relationship to the person you were travelling with? They are my...

#### SINGLE CODE

- 1. Wife
- 2. Husband
- 3. Partner
- 4. Son (including step-son and son-in-law)
- 5. Daughter (including step-daughter and daughter-in-law)
- 6. Mother (including step-mother and mother-in-law)
- 7. Father (including step-father and father-in-law)
- 8. Brother (including step-brother and brother-in-law)
- 9. Sister (including step-sister and sister-in-law)
- 10. Grandparent
- 11. Grandchild
- 12. Other relative
- 13. Friend
- 14. Neighbour
- 15. Colleague
- 16. Other (Please specify)

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#### **ASK ALL**

A3 (IF CUSTOMER AT A1): How often do you typically use Passenger Assist?

(IF COMPANION AT A1): How often does your <ANSWER FROM A2> typically use Passenger Assist?

#### SINGLE CODE

- 1. Three or more times per week
- 2. One to two times per week
- 3. One to three times per month
- 4. Less than once a month, more than once or twice a year
- 5. Once or twice a year
- 6. Less than once a year
- 7. Don't know

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# **Section B: Confirming journey details**

We understand on **(FROM SAMPLE)** <DATE>, **(IF CUSTOMER AT A1)** <you> **(IF COMPANION AT A1)** <your ANSWER FROM A2> made a journey via train. We are interested in the assistance you booked in advance for one specific part of the journey. We would like to ask what happened at **(FROM SAMPLE)** <STATION WHERE ASSISTANCE REQUIRED> station.

#### **ASK ALL**

B1 INTERVIEWER: Confirm that the respondent recalls this journey and feels able to answer about this. If not, thank and close.

#### SINGLE CODE

- 1. Continue
- 2. Thank and close

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#### **Section C: The booking process**

#### **ASK ALL**

C1 Which of the following types of assistance did you request at **(FROM SAMPLE)** <STATION WHERE ASSISTANCE REQUIRED> station?

#### **MULTI CODE**

- 1. Planning the journey
- 2. Booking the wheelchair area
- 3. Help with luggage
- 4. Getting in/out of the station
- 5. Getting to the platform
- 6. Getting to a seat
- 7. Getting to the wheelchair area
- 8. Boarding/alighting the train
- 9. Provision of a ramp
- 10. Assistance to and from connecting services
- 11. Guidance if you are visually impaired
- 12. A taxi if required (if the station you wanted to use was inaccessible to you)
- 13. Some other type of assistance (Please specify)
- 14. DO NOT READ OUT: Don't know/Can't remember THANK AND CLOSE

# **ASK IF C1 = 3 (BOOKED HELP WITH LUGGAGE)**

C2 Were you asked when booking whether help was needed with luggage or did you request this?

#### SINGLE CODE

- 1.I was asked about help with luggage when booking
- 2.1 requested help with luggage
- 3. Don't know/Can't remember

#### **ASK ALL**

C3 Did you receive confirmation of the assistance booking?

## SINGLE CODE

- 1.Yes
- 2.No
- 3. Don't know/Can't remember

#### ASK IF C3 = 1 (RECEIVED CONFIRMATION OF BOOKING)

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C4 Was the information in the booking confirmation accurate?

#### SINGLE CODE

- 1. Yes
- 2.No
- 3. Don't know/Can't remember

# ASK IF C3 = 1 (RECEIVED CONFIRMATION OF BOOKING)

C5 How easy to understand were the instructions within the booking confirmation about where to meet the staff member?

#### READ OUT, SINGLE CODE

5 = Very	4 = Fairly	3 = Neither	2 = Fairly	1 = Very	0 = I was	6 =	7=
easy to	easy to	easy nor	difficult to	difficult to	not told	Don't	/= N/A
understand	understand	difficult	understand	understand	this	know	11/7

a. Information about when to meet the staff member

#### **ASK ALL**

C6 Before we go on to discuss the actual day of your journey, please tell us which of the following best describes how you felt after making your booking...

## READ OUT, SINGLE CODE

- 1. I felt confident that all requirements would be met
- 2.I felt confident that most requirements would be met
- 3.1 felt doubtful that requirements would be met on the day
- 4. DO NOT READ OUT: Don't know

#### **ASK ALL**

C7 Thinking about the booking process, how satisfied were you with... READ OUT FIRST ITEM?

What score out of 5 would you give where 1 is very dissatisfied and 5 very satisfied?

READ OUT SUBSEQUENT ITEMS IN TURN, SINGLE CODE PER ROW, ROTATE ORDER OF STATEMENTS

#### REPEAT SCALE AS NECESSARY

5 = Very satisfied	4 = Satisfied	3 = Neither satisfied nor dissatisfied	2 = Dissatisfied	1 = Very Dissatisfied	6 = Don't know
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a. The overall assistance booking process

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b. Information about where to meet the staff member



- b. The helpfulness of staff when booking assistance
- c. The assistance arrangements that were booked for the journey

# ASK IF 1 OR 2 SELECTED FOR ANY C7 STATEMENTS (DISSATISIFIED WITH AT LEAST ONE ASPECT OF BOOKING PROCESS)

C8 You said you were dissatisfied with <INSERT ITEMS FROM C7>. Please can you briefly explain why these aspects did not fully meet your expectations?

OPEN RESPONSE, PROBE FULLY

-----

99 Don't know

# ASK IF 5 SELECTED FOR ANY C7 STATEMENTS (VERY SATISFIED WITH AT LEAST ONE ASPECT OF BOOKING SERVICE)

C9 You said you were very satisfied with <INSERT ITEMS FROM C7>. Please can you briefly explain why?

OPEN RESPONSE, PROBE FULLY

\_\_\_\_\_

99 Don't know

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### Section D: Journey experience

We'd now like to ask you about what happened with regards to the assistance (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> booked for (FROM SAMPLE) <DATE> at (FROM SAMPLE) <STATION WHERE ASSISTANCE REQUIRED> station.

### ASK IF A1 = 1 (CUSTOMER)

D1 Were you travelling alone or with someone?

#### SINGLE CODE

- 1. Alone
- 2. With a companion

#### **ASK ALL**

D2 What was the main purpose of the journey?

#### PROBE AS PER PRECODES, SINGLE CODE

- 1. Commuting (e.g. to work, school or university)
- 2. Business/ other work (e.g. to a business meeting with a customer)
- 3. Leisure (e.g. shopping, visiting friends/ relatives, day trip/ holiday)
- 4. Other (please specify)
- 5. Prefer not to say

#### **ASK ALL**

D3 IF CUSTOMER AT A1: Have you made this journey before?

IF COMPANION AT A1: Has <your ANSWER FROM A2> made this journey before?

- 1. Yes
- 2.No

#### **ASK ALL**

D4 Was a member of staff there to meet (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> within an acceptable timeframe?

#### PROBE AS PER PRECODES, SINGLE CODE

- 1. Yes
- 2. No, but I was eventually met by staff and able to continue my journey as planned
- 3. No, but I was eventually met by staff and able to continue my journey (but not as planned, e.g. took a later train)

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- 4. No, I was eventually met by staff but not able to continue my journey
- 5. No, I was not met by staff but was able to continue my journey as planned



- 6. No, I was not met by staff but was able to continue my journey (but not as planned, e.g. took a later train)
- 7. No, I was not met by staff and was not able to continue my journey
- 8. DO NOT READ OUT: Don't know/Can't remember

#### **ASK IF D4 = 1-4**

D5 And did (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> actually receive the following assistance....?

SHOW FROM SAMPLE ASSISTANCE REQUESTED, READ OUT EACH ITEM IN TURN

	Yes	No	DO NOT READ OUT: Don't know/Can't remember
SHOW CODES FROM C1 SINGLE CODE FOR EACH ITEM	1	2	3

#### **ASK IF D4 = 1-4**

D6 And how satisfied (IF CUSTOMER AT A1) <were you> (IF COMPANION AT A1) <was your ANSWER FROM A2> with....

SHOW CODES WHERE D5 = 1, READ OUT SUBSEQUENT ITEMS IN TURN, SINGLE CODE PER ROW REPEAT SCALE AS NECESSARY

5 = Very satisfied	4 = Satisfied	3 = Neither satisfied nor dissatisfied	2 = Dissatisfied	1 = Very Dissatisfied	6 = Don't know
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#### **ASK IF D4 = 1-4**

D7 And how satisfied (IF CUSTOMER AT A1) <were you> (IF COMPANION AT A1) <was your ANSWER FROM A2> overall with the assistance at (FROM SAMPLE) <STATION WHERE ASSISTANCE REQUIRED> station?

REPEAT SCALE AS NECESSARY

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5 = Very satisfied	4 = Satisfied	3 = Neither satisfied nor dissatisfied	2 = Dissatisfied	1 = Very Dissatisfied	6 = Don't know
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#### **ASK IF D7 = 1 OR 2**

D7b Why were (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <they> dissatisfied with the assistance?

OPEN RESPONSE, PROBE FULLY

-----

99 Don't know

# ASK IF ANY OF D5 = 2 (DID NOT RECEIVE THE ASSISTANCE REQUESTED)

- D8 Did not receiving the assistance requested affect (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> being able to get to the <u>final</u> destination?
  - 1.Yes
  - 2.No
  - 3. Don't know/Can't remember

### **ASK IF D8 = 1**

D9 Please provide details of how (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> was affected.

OPEN RESPONSE, PROBE FULLY

\_\_\_\_\_

99 Don't know

### **ASK C1 DOES NOT = 12 AND D4 = 1-4**

D10 At any point in this part of your journey did the assistance involve a taxi or alternative means of transport arranged by the train company?

### SINGLE CODE

- 1. Yes
- 2.No
- 3. Don't know/Can't remember

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# **BREAKING BLUE**

## ASK IF D10 = 1 OR D5 12 = 1 (ASSISTANCE INVOLVED A TAXI)

**IF D5\_12 = 1 SHOW:** You said earlier that your assistance involved a taxi.

D11 Did the vehicle arrive on time?

#### SINGLE CODE

- 1. Yes
- 2.No
- 3. Don't know/Can't remember

## ASK IF D10 = 1 OR D5 12 = 1 (ASSISTANCE INVOLVED A TAXI OR ALTERNATIVE TRANSPORT)

D12 Was the vehicle suitable for (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2>?

#### SINGLE CODE

- 1. Yes
- 2.No
- 3. Don't know/Can't remember

#### **ASK IF D4 = 1-4**

D13 And did (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> experience any disruption such as delays or cancellations on the stage of the journey at (FROM SAMPLE) <STATION WHERE ASSISTANCE REQUIRED> station?

#### SINGLE CODE

- 1.Yes
- 2.No
- 3. Don't know/Can't remember

#### **ASK IF D13 = 1**

D14 Please explain the disruption experienced and what happened as a result.

OPEN RESPONSE, PROBE FULLY

\_\_\_\_\_

#### **ASK IF D13 = 1**

D15 Did (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> reach the final destination for the journey?



#### SINGLE CODE

- 1. Yes as planned
- 2.No
- 3. Don't know/Can't remember

#### **ASK IF D13 = 1**

D16 Did someone contact (**IF CUSTOMER AT A1**) <you> (**IF COMPANION AT A1**) <your ANSWER FROM A2> to let (**IF CUSTOMER AT A1**) <you> (**IF COMPANION AT A1**) <them> know that the assistance had changed?

- 1.Yes
- 2.No
- 3. Don't know/can't remember

#### **ASK IF D4 = 1-4**

What score out of 5 would you give where 1 is very dissatisfied and 5 very satisfied?

READ OUT SUBSEQUENT ITEMS IN TURN, SINGLE CODE PER ROW, ROTATE ORDER OF STATEMENTS

#### REPEAT SCALE AS NECESSARY

5 = Very satisfied	4 = Satisfied	3 = Neither satisfied nor dissatisfied		1 = Very Dissatisfied	6 = Don't know
-----------------------	---------------	--	--	--------------------------	-------------------

- a. The helpfulness and attitude of staff who provided assistance at the station

# ASK IF 1 OR 2 SELECTED FOR D17 STATEMENTS (DISSATISIFIED WITH AT LEAST ONE ASPECT OF THE STAFF)

D18 You said (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <they> were dissatisfied with <INSERT ITEMS FROM D17>.Please can you briefly explain why these aspects did not fully meet (IF CUSTOMER AT A1) <your> (IF COMPANION AT A1) <their> expectations?

OPEN RESPONSE, PROBE FULLY

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99 Don't know

# ASK IF 5 SELECTED FOR ANY D17 STATEMENTS (VERY SATISIFIED WITH AT LEAST ONE ASPECT OF THE STAFF)

D19 You said (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <they> were very satisfied with <INSERT ITEMS FROM D17>. Please can you briefly explain why?

OPEN RESPONSE, PROBE FULLY

\_\_\_\_\_

99 Don't know

#### **ASK IF D4 = 1-4**

D20 We are keen to know how helpful (IF CUSTOMER AT A1) <you> (IF COMPANION AT A1) <your ANSWER FROM A2> found Passenger Assist in terms of making the train journey possible or simply more convenient. Which of the following best describes (IF CUSTOMER AT A1) <your> (IF COMPANION AT A1) <their> experience?

PROBE AS PER PRECODES, SINGLE CODE

- 1. I/They could not have completed this particular journey without Passenger Assist
- 2.I/They could have completed my journey but it would have been more difficult (e.g. would have taken more time, needing another person etc.)
- 3.I/They could have completed my journey without Passenger Assist
- 4. Don't know

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#### Section E: General views on the assisted travel service

We would now like your thoughts on Passenger Assist as a whole. We're keen to understand your perspective on what works well, what doesn't work so well, and how you think the service could be improved.

#### **ASK ALL**

E1 Overall, on a scale of 1 to 5, where 1 is very dissatisfied and 5 very satisfied, how satisfied are you with Passenger Assist?

#### SINGLE CODE

5 = Very satisfied	4 = Satisfied	3 = Neither satisfied nor dissatisfied	2 = Dissatisfied	1 = Very Dissatisfied	6 = Don't know
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#### **ASK IF E1 = 1-5**

E2 Why do you say that?

OPEN RESPONSE, PROBE FULLY

99 Don't know

# **ASK ALL**

E3 In terms of your general experiences of using Passenger Assist, overall, how satisfied are you in terms of the following:

READ OUT, SINGLE CODE PER ROW, ROTATE ORDER OF STATEMENTS

		3 = Neither				
5 = Very satisfied	4 = Satisfied	satisfied nor	2 = Dissatisfied	1 = Very dissatisfied	6 = Don't know	7= N/A
		dissatisfied				

- a. Station facilities suitable for (IF CUSTOMER AT A1) <my> (IF COMPANION AT A1) <their> needs
- b. Train facilities suitable for (IF CUSTOMER AT A1) <my> (IF COMPANION AT A1) <their> needs
- c. Staff helpfulness when using the assisted travel service

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#### **ASK ALL**

E4 On a scale of 0 to 10, where 0 is very unlikely and 10 very likely, how likely would you be to recommend Passenger Assist to a friend/ family member who may require such a service?

#### SINGLE CODE

Very likely = 10	9	8	7	6	5	4	3	2	1	Very unlikely = 0	DK = 11
------------------------	---	---	---	---	---	---	---	---	---	-------------------------	---------

#### **ASK ALL**

ORR is interested in any feedback you may have regarding Passenger Assist. If you could make one change to make it better, what would that be and why?

OPEN RESPONSE, PROBE FULLY

98 Nothing

99 Don't know

Date Last Edited: 13 November, 2017



## **Section F: Demographics**

Before we finish, we would just like to ask a couple of final demographic questions. This is important as it helps us to better understand if Passenger Assist is meeting the needs of all types of customers.

#### **ASK ALL**

- F1 IF CUSTOMER AT A1: DO NOT ASK AND CODE GENDER
  - IF COMPANION AT A1: ASK IF A2 = 3 OR 10-16: Is your <ANSWER FROM A2>...
  - 1. Male
  - 2. Female
  - 3. Refused

#### **ASK ALL**

- F2 **IF CUSTOMER AT A1:** How old are you?
  - IF COMPANION AT A1: How old is your <ANSWER FROM A2>?

#### SINGLE CODE

- 1.16-24
- 2.25-34
- 3.35-49
- 4.50-64
- 5.65-74
- 6.75+
- 7. DO NOT READ OUT: Refused

### **ASK ALL**

- F3 **IF CUSTOMER AT A1:** Which of the following best describes your current circumstances?
- **IF COMPANION AT A1:** Which of the following best describes your <ANSWER FROM A2>'s current circumstances?

## READ OUT, SINGLE CODE

- 1. Working full or part-time
- 2. Not working
- 3. Student
- 4. Retired
- 5. Other (Please specify)
- 6. DO NOT READ OUT: Refused

#### **ASK ALL**



F4 (IF CUSTOMER AT A1) <Do you> (IF COMPANION AT A1) <Does your ANSWER FROM A2> have any of the following long-standing physical or mental health conditions?

# READ OUT, MULTI CODE

- 1. Vision (blindness or visual impairment)
- 2. Hearing (deafness or hard of hearing)
- 3. Physical (wheelchair user, mobility issues, amputee, dwarfism)
- 4. Learning or concentrating or remembering
- 5. Mental health problems
- 6. Social or behavioural issues, for example, due to neurological diverse conditions such as Autism, Attention Deficit or Asperger's Syndrome
- 7. Another long-term health condition that doesn't fit any of the above
- 8. None of these conditions

SINGLE CODE

9.1 would prefer not to say

SINGLE CODE

#### **ASK ALL**

Thank you for sparing the time to help ORR with this study. Occasionally, it is very helpful for us to be able to re-contact people we have spoken to, either to clarify certain issues, or to get a bit more detail on topics that ORR is particularly interested in. Would you be happy for us to call you back briefly if necessary?

Just to remind you: Your details will be kept completely confidential and all your answers will remain anonymous.

#### SINGLE CODE

- 1. Yes
- 2.No

#### **ASK ALL**

F6 INTERVIEWER: CAPTURE NAME AND CONTACT NUMBER

**OPEN RESPONSE** 

NAME:

TELEPHONE NUMBER:

Those are all of the questions I have for you today. Thank you very much for taking part in this survey. Your answers will help ORR to understand more about passengers' experience of the assisted travel service and identify areas for improvement.

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# Stay in touch









#### **BREAKING BLUE**



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This work has been conducted in accordance with ISO 20252, the international standard for market and social research.

Our policies and procedures adhere to the Cyber Essential security scheme.











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