Emirates Customer Satisfaction Survey
Q4 2013/14

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Emirates AIR·LINE

Background

The Emirates Air Line (EAL), the UK's first ever urban cable car, opened to the public on 28 June 2012. Passengers can now cross the River Thames travelling at heights of up to 90 metres between two terminals – the Emirates Greenwich Peninsula and the Emirates Royal Docks.

This report focuses on the Q4 2013/14 results of the EAL Customer Satisfaction Survey (CSS), conducted from 7 January 2014 to 16 March 2014. This report also includes comparisons, where appropriate, with previous quarters:

- Q3 2013/14 (15 September 2013 to 28 December 2013)
- Q2 2013/14 (23 June 2013 to 10 September 2013)
- Q1 2013/14 (1 April 2013 to 15 June 2013)
- Q4 2012/13 (7 January 2013 to 26 March 2013)
- Q3 2012/13 (from 16 September 2012 to 2 January 2013)

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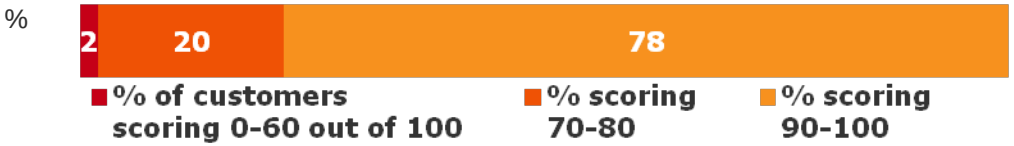
Headlines

Overall satisfaction among EAL customers in Q4 2013/14 has declined for the first time since the CSS started, by one point from 93 to 92.

Overall Satisfaction
(mean score out of 100): **92**



Most aspects of the service scored at least 94 out of 100; the only scores under 90 were for information inside the cabin and value for money (88 and 85 respectively, consistent with Q3).

Although most satisfaction scores were consistent when compared to Q3, there was a drop in the satisfaction scores for the length of wait and the level of crowding at the terminal in Q4.

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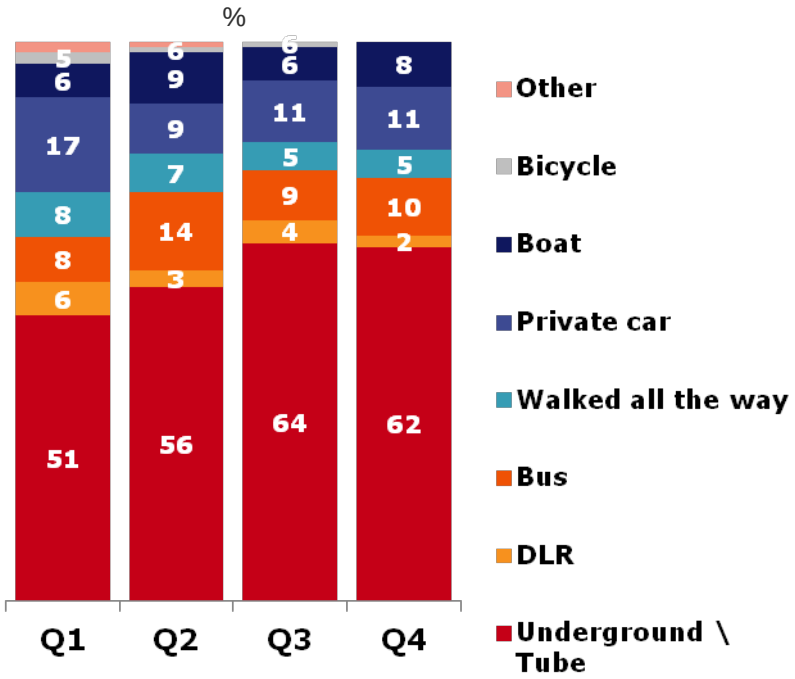
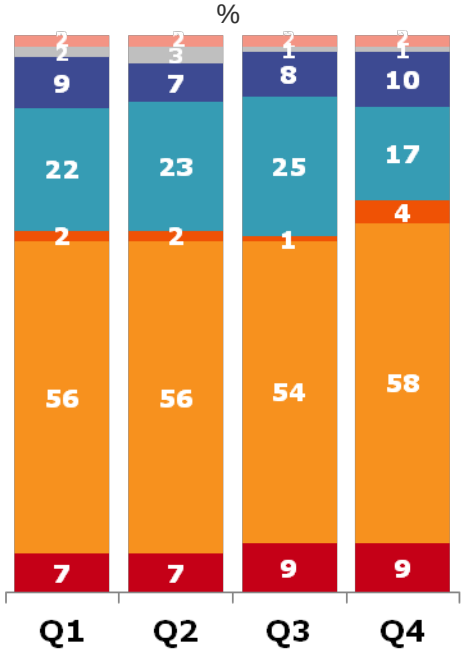
How did EAL customers arrive at the terminal?

The Underground is the main mode of access to the Greenwich Peninsula, although there are some small seasonal changes with fewer arriving by bus and boat since Q2 and more by the Underground. The DLR remains the main mode of access to the Royal Docks Terminal, with a four point increase from Q3.

Emirates Greenwich Peninsula Terminal



Emirates Royal Docks Terminal



BASE: All using the Emirates Air Line between 07.01.14– 16.03.14 (n=673)

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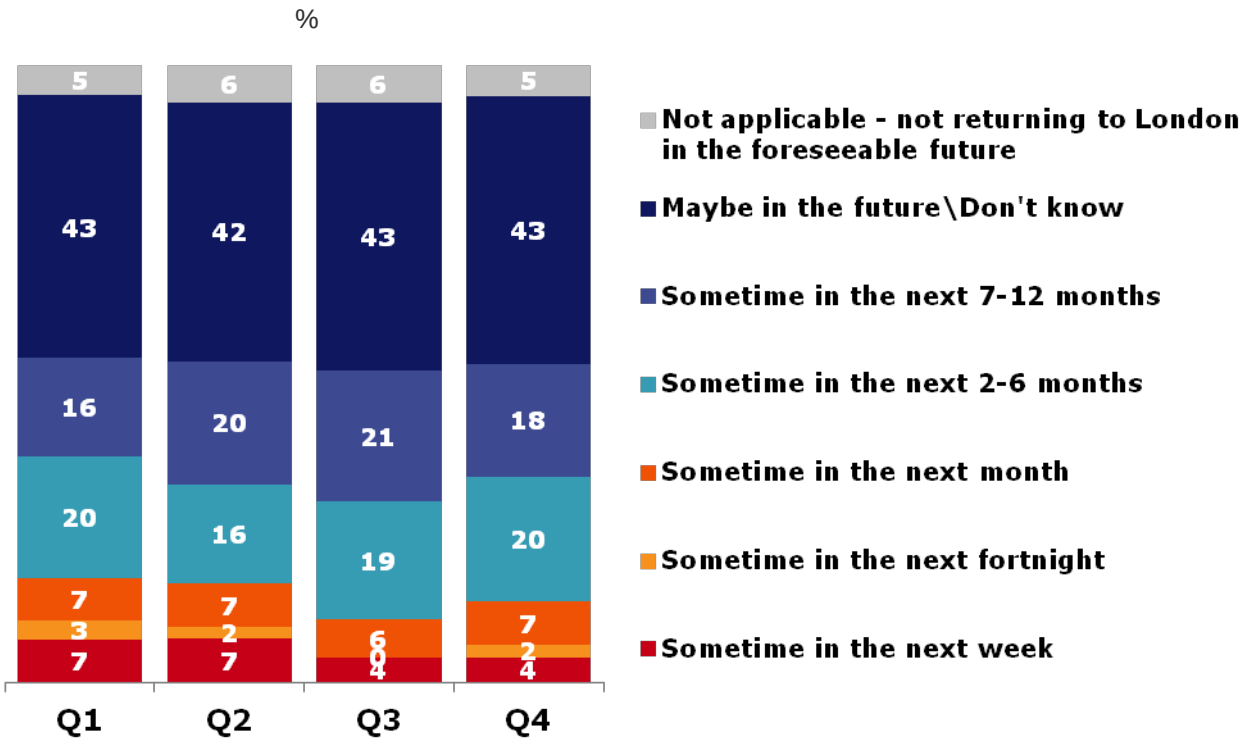
Likelihood to revisit (among first-time customers)

Among those using the service for the first time (73% of customers), the likelihood to revisit is high, with around half saying they will revisit in the next 12 months and a third claiming they will do so within the next 6 months.



BASE: All using the Emirates Air Line for the first time between 07.01.14– 16.03.14 (n=493)

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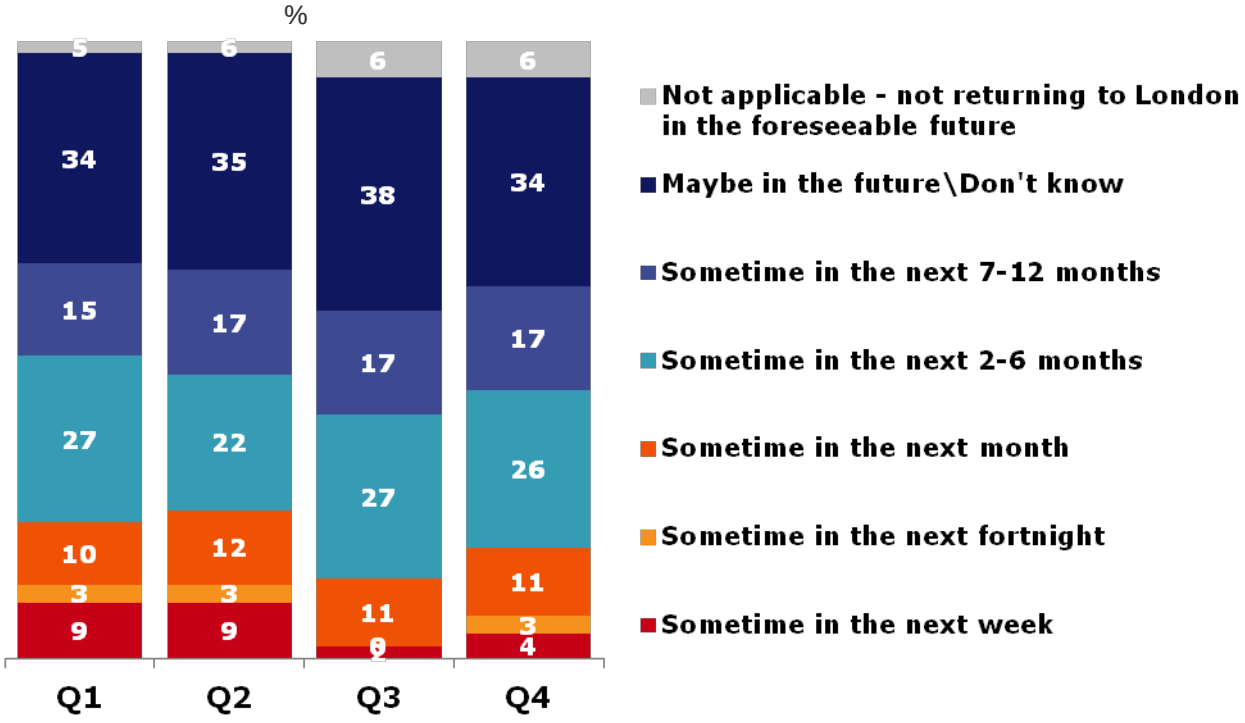
Likelihood to revisit **among Londoners** (first-time customers)

As might be expected, Londoners are slightly less likely to be using the service for the first time (67%, compared to 73% of all customers) and their likelihood to revisit in the short-term is higher.



BASE: All using the Emirates Air Line between 07.01.14– 16.03.14 (n=225)

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Overall satisfaction by different user types

Overall satisfaction remains very high, with 78% of customers rating the service either 9 or 10 out of 10.

12/13		13/14				YTD	
Q3	Q4	Q1	Q2	Q3	Q4	2013/14	
79	81	80	80	79	78	79	Overall Satisfaction
76	80	77	81	77	74	77	Live in London
83	85	85	81	79	85	83	Live in the South East
86	81	82	85	85	81	83	Live elsewhere in the UK
81	78	81	73	77	79	77	Live overseas
80	81	80	79	80	79	79	Just for the experience
82	79	75	84	69	84	78	Attending event at O2
78	85	83	74	88	78	80	Attending event at ExCel
76	79	82	80	81	73	79	Leisure
80	82	81	82	83	80	81	Weekday visit
78	80	79	78	75	76	77	Weekend visit
80	81	80	81	79	79	80	Weather: dry
73	69	77	79	83	83	81	Weather: wet

Coloured shading highlights high to low (green to red) satisfaction scores

% of customers giving scores 90-100

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= Significant increase/decrease since the previous quarter
*Note: some of the bigger differences will not show as significant due to small base sizes

Overall satisfaction for individual elements of journey

Satisfaction with all aspects of the service remains very high, with only two aspects scoring under 90 out of 100 (**information inside the cabin** and **value for money**). Satisfaction with the **length of wait** and **level of crowding** at the terminal both scored 94, significantly decreasing from 95 in Q3. Although there was no significant change in Q4, the staff measures have declined since the start of the survey.

2012/13 Q3	2012/13 Q4	2013/14 Q1	2013/14 Q2	2013/14 Q3	2013/14 Q4		2013/14 YTD	
93	93	93	93	93	92		93	Overall Satisfaction
93	94	94	94	95	94		94	Likelihood to recommend Emirates Air Line
97	97	95	94	95	94	↓	94	Length of wait/queue at the terminal
97	97	97	96	97	97		97	Cleanliness and freedom from litter at the terminal
97	97	97	96	96	97		96	State of repair and condition of terminal
97	96	94	93	95	94	↓	94	Level of crowding at the terminal
91	90	91	90	91	91		91	Information, signs and maps at the terminal
96	97	96	96	96	96		96	Personal safety at terminal
95	96	94	94	94	94		94	Ease of buying ticket for journey
97	97	96	95	96	96		96	Level of crowding inside the cabin
96	96	96	96	95	95		96	Operational safety
96	96	96	96	95	96		96	Personal safety during journey
88	87	89	87	87	88		88	Information inside the cabin
97	98	97	97	97	97		97	Cleanliness and freedom from litter inside the cabin
98	98	97	96	96	97		97	State of repair and condition of the cabin
95	94	95	95	94	95		95	Comfort inside the cabin
96	96	97	96	96	96		96	Ease of getting into cabin
90	91	92	91	91	90		91	Length of journey
96	96	95	95	95	94		95	Availability of staff at terminal
96	95	95	95	95	95		95	Helpfulness and appearance of staff at the terminal
95	94	94	94	94	93		94	Welcome from staff on duty at the terminal
84	84	85	85	85	85		85	VFM

Coloured shading highlights high to low (green to red) satisfaction scores

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↑ ↓ = Significant increase/decrease since the previous quarter

Satisfaction with ease of ticket purchase and value for money by ticket type

In Q4, 57% of customers paid by Oyster PAYG. Satisfaction scores have generally remained consistent, however ease of buying was slightly lower than the same quarter last year for both paper and Oyster methods.

Q3 12/13	Q4 12/13	Q1 13/14	Q2 13/14	Q3 13/14	Q4 13/14	2013/14 YTD		
95	95	95	95	94	94	94	Paper	Satisfaction with ease of buying by ticket type
95	96	94	94	95	94	94	Oyster	
85	83	87	88	87	87	87	Paper	Satisfaction with value for money by ticket type
84	84	84	84	83	83	83	Oyster	
84	81	87	85	87	87	86	Full Fare	Satisfaction with value for money by fare paid
86	84	87	90	88	88	88	Discount	

Coloured shading highlights high to low (green to red) satisfaction scores

BASE: All using the Emirates Air Line between 07.01.14– 16.03.14 (n=673)

NB: satisfaction with value for money by fare paid is based on those with paper boarding passes (excluding multi journey pass and private hire cabin) n=376

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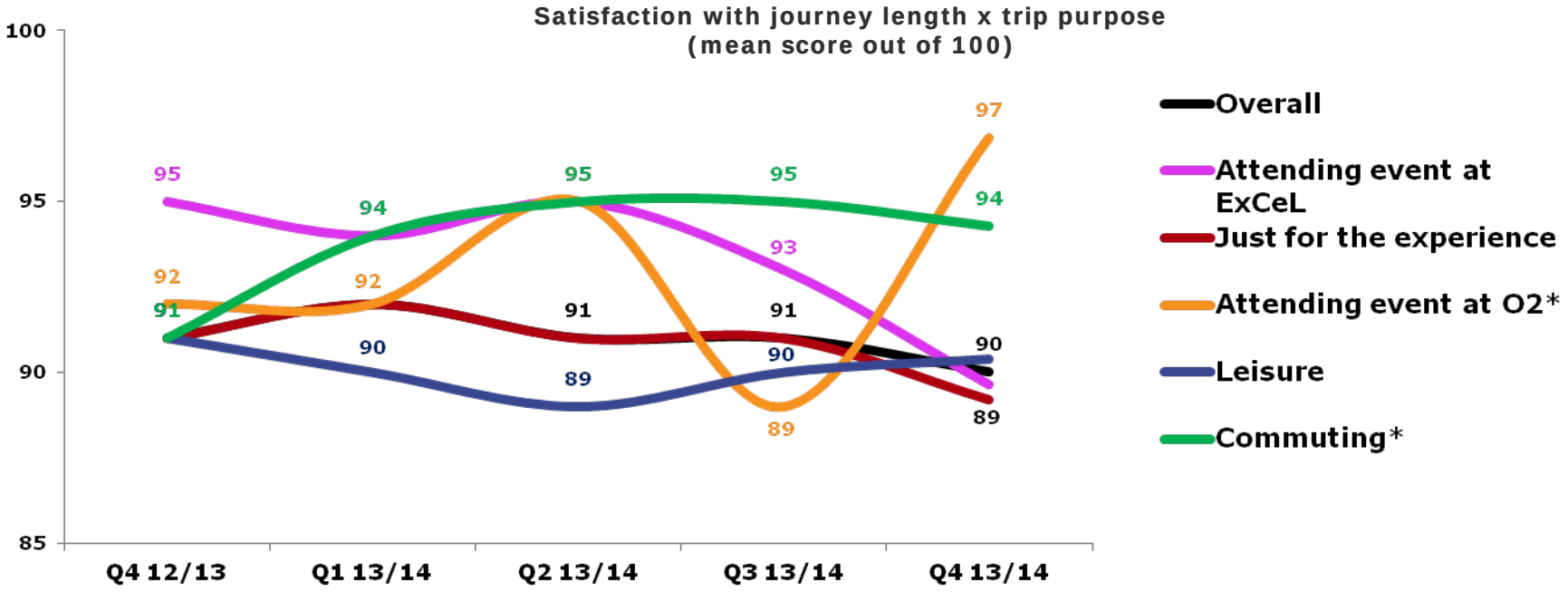
= Significant increase/decrease since the previous quarter

Length of journey

Satisfaction was highest for those attending an event at the O2 or commuting. Other journey purposes stayed consistent with the overall journey length score. Verbatim comments indicate that any dissatisfaction with the journey length is due to the experience being perceived as being over too quickly.



*Note: Low base sizes for O2 Arena (n=19), Commuting (n=21)

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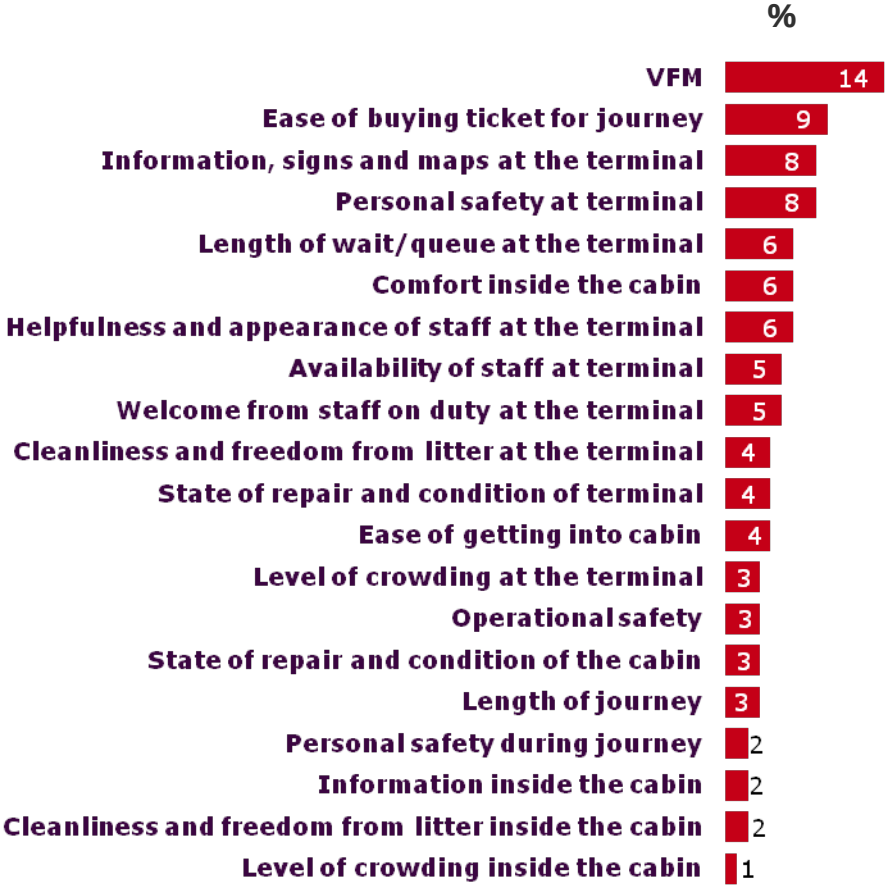
Key Drivers of Overall Satisfaction – all areas of the experience

Value for money has the greatest influence on overall satisfaction. **Ease of buying a ticket, Information** and **Personal safety at the terminal** are also important.



IMPORTANCE SCORE (the higher the score, the more it drives overall satisfaction)

R-squared value = 38%. An acceptable score for closeness of fit between overall satisfaction (the dependent variable) and other measures. Closeness of fit compares well with similar analysis on other comparable surveys

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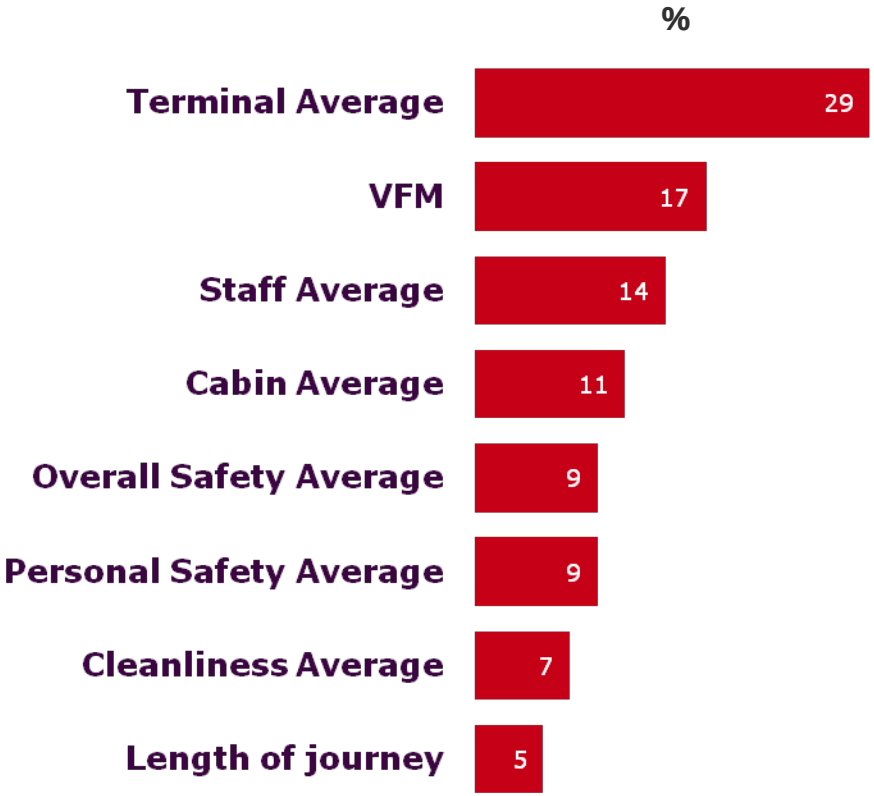
Key Drivers of Overall Satisfaction - main areas of the experience

Aspects related to the **terminal** have, by far, the greatest influence on overall satisfaction, with the impact of the remaining areas on overall satisfaction being much lower.



IMPORTANCE SCORE (the higher the score, the more it drives overall satisfaction) – based on correlation analysis of the satisfaction scores.

*** 'Averages' represent the aggregated scores for various combinations of measures**

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Shapley Regression: Importance to Overall Satisfaction

Methodology

Face-to-face interviews were conducted with a random sample of EAL customers as they exited the terminals (Greenwich Peninsula and Royal Docks) after their flight.

Fieldwork covered both weekdays and weekends at the two terminals to ensure a representative sample of users were included in the survey.

Quarter	Dates	Base Size
Q4	7 January 2014 to 16 March 2014	673
Q3	15 September 2013 to 28 December 2013	710
Q2	23 June 2013 to 10 September 2013	737
Q1	1 April 2013 to 15 June 2013	653
Q4	7 January 2013 to 26 March 2013	625
Q3	16 September 2012 to 2 January 2013	782

The interviews are based on a short 6 minute questionnaire collecting:

- Customer satisfaction with all aspects of the trip
- Key profile information e.g. where do they live? purpose of trip? frequency of using EAL?

Satisfaction measures are rated on a scale of 0-10 where 10 is extremely satisfied and 0 is extremely dissatisfied. Mean scores (e.g. 9.2) are indexed to provide a score out of 100 (92).

An initial survey 'pilot' was carried out (978 interviews completed between July – September 2012), but results from that wave are not shown in this report.

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