

# Eurostar—A Seamless Journey to the Continent

*Eurostar* is the fast rail service directly linking the UK to France and Belgium via the Channel Tunnel. It started operating in 1994, providing services between city centres. The opening of the first section of the Channel Tunnel Rail Link (CTRL) on 28 September 2003 significantly reduced journey times between the UK and the Continent. Following the opening of the section from Dollands Moor near the Channel Tunnel at Folkestone to Fawkham Junction near Swanley, the journey time of the fastest service between London Waterloo and Paris was reduced by 40 minutes to 2 hours 35 minutes. The fastest journey between Waterloo and Brussels is now 2 hours 15 minutes and that between Waterloo and Lille is now only 1 hour and 40 minutes.

There are up to 14 services to Paris and 9 to Brussels each day. In addition, up to 9 trains stop at Lille in northern France, and up to four stop at Calais-Fr ehun en route. Also, 14 trains call daily at the Ashford International terminal, which serves as the principal passenger gateway from Kent. There are direct daily services from Waterloo and Ashford right to the gates of Disneyland Resort Paris. During the winter holiday season, two services operate each week from Waterloo and Ashford to Moutiers and Bourg-St-Maurice in the French Alps. A direct service to Avignon in Provence runs on Saturdays during the summer.

Over 100 destinations across France, Belgium and the Netherlands are easily reached using connecting services with through ticketing. For example, Lyon is only 5 hours from London while Marseille is 7 hours. Brussels-Midi/Zuid is the gateway for the Netherlands with easy connections to Amsterdam (about 6 hours from London).

*Eurostar* is the official carrier for Lille 2004—European Capital of Culture and 2004 is also the Centenary of the Entente Cordiale between the UK and France. As

an official partner, *Eurostar* is at the heart of events during this year of celebrations. Ticket prices meet all budgets—leisure travellers enjoy the cheapest fares with permanent lead-in short break fares from £59 return.

Since starting operations in November 1994, *Eurostar* has more than doubled the total number of passengers travelling (by air or rail) between London and Paris/Brussels, selling a total of more than 55 million tickets.

Significant differences in the rail networks between the UK, France and Belgium had to be solved before establishing *Eurostar* services. European rail networks focus primarily on domestic services, using different technologies—especially in power supply and signalling—as well as in commercial areas, such as ticketing. *Eurostar* has successfully overcome these obstacles to operate safely and efficiently across three territories.

In addition to passenger services, *Eurostar* trains offer same- or next-day parcel services between London, Paris and Brussels under the Esprit Europe brand-name. And guide dogs are now also being carried between London Waterloo, Paris and Brussels under the UK's Pet Travel Scheme (PETS).

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## New Standards for International Train Travel

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*Eurostar* is at the leading edge of innovation in the rail industry, setting new standards for train travel. It was one of the first rail operators to introduce business lounges, a loyalty programme, premium class and meal-inclusive tickets for passengers in first class, successfully building up a significant market share by offering a number of advantages over other transport modes, including:

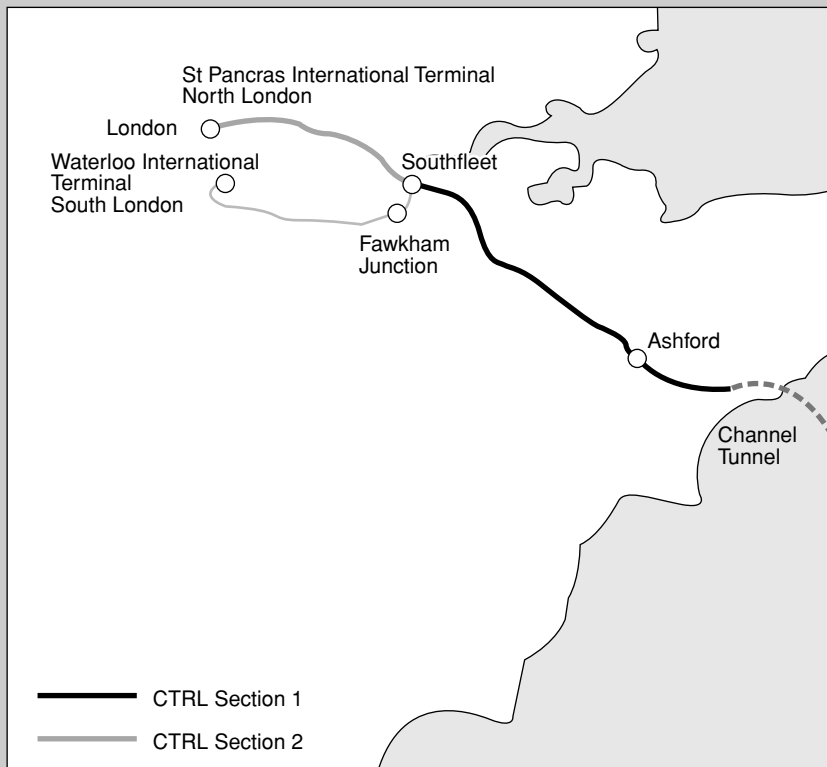
- Seamless travel between city centres



*Eurostar* train on new UK high-speed line in Kent

(Eurostar Group)

### Channel Tunnel Rail Link



- Frequent services
- Better service punctuality than competitors
- Comfort and space
- Time efficiency—shorter door-to-door journey times than air
- Cost competitiveness
- Convenient fast 10-minute check-in for premium and business first class full-fare ticket holders
- No queues or baggage reclaim waiting on arrival in city centre
- Clear and generous ticket refund policy in event of trains delays, etc.
- Eurostar Frequent Traveller loyalty programme with benefits for regular users, including free travel, etc.

### Train and terminal refurbishments

£35 million is being invested in a

refurbishment programme covering all service aspects in all three countries, including carriage interiors, lounges, terminals, ticket offices, check-in, dining facilities, and staff uniforms.

The first phase was completed with the unveiling of new enlarged business lounges at Waterloo, Paris Nord and Brussels-Midi/Zuid. The business lounges with bar, communication facilities and comfortable seating, providing an oasis of calm for the business traveller en route from one European capital to another, are open to all holders of premium, business first and business value first tickets as well as to Eurostar carte blanche holders.

A fleet-wide refurbishment of both first- and standard-class carriage interiors began in mid-2004 based on a detailed design created by an in-house design theme. This restyling is complemented

by the February 2004 introduction of new uniforms designed by Jacqueline de Baer for terminal staff and train crew.

### UK Rail speed record and faster journeys

Before the first section of the CTRL was opened to commercial operations in September 2003, the UK rail speed record was broken in July 2003 by a *Eurostar* test train running over the CTRL at 334.7 km/h. *Eurostar* trains can operate at maximum speeds of 300 km/h on the CTRL and the high-speed lines in France and Belgium. When the second section of the CTRL is opened to a new international station at St Pancras in 2007, the fastest journey times will be reduced by another 15 minutes.

### Rolling stock

The current fleet totals 27 trains operating between the UK, France and Belgium. A further three trains are being used on domestic services in France and a fourth is based in Belgium. Seven regional train sets are owned in the UK. Some are leased to Great North Eastern Railway (GNER) for services between London and Yorkshire while others are used for testing. Each 400-m set is formed from 18 passenger carriages and two power cars. The international services offer 766 seats—almost twice the capacity of a Boeing 747—with 560 seats in standard class and 206 in first class. The regional trains are shorter with 14 passenger carriages and have 444 seats in standard class and 114 in first class.

Since *Eurostar* trains cannot be lengthened or shortened according to passenger demand, load factor is not a key performance indicator (unlike airlines, which can deploy different sizes of aircraft to match load).

### Safety

The Eurostar Group has an excellent safety record with each of its trains having a full

range of safety features, making them among the safest trains in the world. Since the trains operate through the Channel Tunnel, their fireproofing systems are unique and include extensive use of fire-resistant materials, heavy insulation of cables, and fire doors between carriages. The driver's cab features modern train protection systems, including the French TVM-430 system, which is used on the new CTRL. The UK Train Protection and Warning System (TPWS) is also installed. All train crew are trained in first aid.

### Market share

Despite intense competition, *Eurostar* has established itself as the leading carrier to Brussels and Paris; it has more than 65% of the London–Paris rail/air market and over 50% of the London–Brussels rail/air market. Award-winning advertising campaigns have helped build a strong brand with high awareness and approval levels. The most recent spontaneous brand awareness figures are 46% in the UK, 41% in France and 44% in Belgium.

### Customer base

Customers come from every country in the world—approximately 57% are British, 26% French, 8% American and 6% Belgian. The majority of the remaining 3% come from the Far East.

The current bias towards Britons can be explained by geography and travel patterns but also results from the strength of Sterling in recent years, making the Continent relatively cheap and the UK relatively expensive as tourist destinations. The majority (54%) of passengers are pure leisure travellers; 27% are travelling for business and the remaining 19% are visiting friends or relatives.

The customer base is continuing to develop as international travel becomes easier and business, social and leisure activity more international.

### Customer satisfaction

Passengers show high customer satisfaction and the most recent survey showed an overall score of 7.71 out of 10 for journey satisfaction.

Most bookings by independent travellers in the UK are made via the Contact Centre, which independent undercover shopping surveys (BPA International Survey) have consistently ranked as the best travel and transport related call centre in the country compared to airlines including British Airways (BA) and Virgin Atlantic. The Centre receives an average of 2 million calls a year.

Customer-relations issues, such as complaints, compliments, comments or suggestions, are handled centrally. In

2003, the Customer Relations team had around 100,000 contacts with customers by letter, phone, email, or through feedback forms.

### Punctuality and reliability

During the first 6 months of 2004, 89% of trains arrived on time or early, comparing favourably with 77% over the same period in the previous year before the CTRL opened.

### Internet ticketing

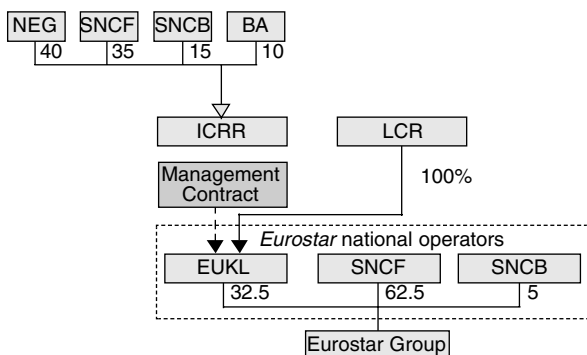
In addition to the other traditional ticketing systems, 20% of UK ticket sales are handled via the company website (<http://www.eurostar.com>), which also offers information and guidance about destinations and acts as a unified online booking facility for all markets.

Regular customers can create personalized accounts for easy access to relevant information; recent enhancements include pricing information and promotions matching customers' needs.

## Corporate Structure

At its launch, *Eurostar* was jointly owned by French National Railways (SNCF), Belgian National Railways

### Eurostar Group Ownership Structure



### Eurostar Board of Directors

- Guillaume Pepy, Chairman
- Richard Brown, Chief Executive Officer
- Ian Nunn, Finance Director
- Jacques Damas, Chief Operating Officer
- Nicholas Mercer, Commercial Director
- Paul Charles, Director of Communications
- François Dorr, IT Director
- Nicolas Petrovic, Director of Customer Service
- Tricia Riley, Human Resources Director
- Victoria Wilson, Director of Corporate & Legal Services



Eurostar on CTRL

(Eurostar Group)



Business lounge at Waterloo International Station

(Eurostar Group)



Business traveler check-in counter at Waterloo International Station (Eurostar Group)

**Table 1 Eurostar Group Awards**

**Service**

World Travel Awards: World's leading rail service every year since 1998  
 Business Travel World magazine: Winner or runner up in at least one category every year since 1996  
 Travel Weekly Globe Awards 2004: Best Rail Operator, UK  
 Guardian/Observer Travel Awards: Best Train Company 1999, 2000, 2001, 2002 and 2003  
 Guardian/Observer Travel Awards: Best Online Booking Service, 2002  
 Daily Telegraph Travel Awards: Best Cross Channel Operator, 1999  
 EASE Award from Queen Elizabeth Foundation for Disabled People, 1998

**Architecture**

Mies Van der Rohe Pavilion Award for European Architecture  
 Royal Institute of British Architects President's Award: Building of the Year, 1994  
 RIBA Downlands Design Award: Ashford International Station  
 Secure Stations awards for both Waterloo and Ashford, 2000 and 2001  
 FX Awards: Best Use of Public Space for Le Salon at Waterloo International  
 Design Week Awards 2003: First Prize in Hospitality Environment category and Best in Show for new business lounges

**People**

Queen Elizabeth's Foundation: EASE Award for disabled access, rail and coach category  
 English Tourist Board: People Award for Outstanding Customer Service (runner up)  
 National Customer Service Awards: Winner Transport and Distribution—Andrew Ditton  
 Networking Industry Awards: Network Team of the Year  
 Business Travel World Awards: Account Management Team of the Year  
 HSBC Rail Business Awards 2003: Business Manager of the Year—Richard Brown

**Marketing**

Effie Awards: For Day Trip campaign 1999/2000  
 Grand Prix de l'Affichage 2000  
 CIMTIG Gold Award (Kylie Minogue advertising campaign), October 2002  
 First Prize APPM 2000  
 CIMTIG Gold Award (Kylie Minogue advertising campaign), October 2002  
 UK Interactive Publishing Award for www.theeuroguide.co.uk site, October 2002  
 HSBC Rail Business Awards 2003: PR Campaign of the Year

**Table 3 Eurostar Group Milestones**

17 May 1993	Waterloo International Terminal completed
20 June 1993	First test train arrived in UK through Channel Tunnel
6 May 1994	Channel Tunnel opened by Her Majesty Queen Elizabeth II and President Mitterrand of France
14 November 1994	Commercial <i>Eurostar</i> services started with two daily services each way to and from Paris and Brussels
8 January 1996	Services started from Ashford International, Kent
1 June 1996	London & Continental Railways (LCR) assumed ownership of European Passenger Services
29 June 1996	Direct services started to Disneyland Resort Paris
14 November 1996	Eurostar Frequent Traveller loyalty programme launched and Eurostar Executive lounge opened at Waterloo International
28 April 1997	Premium First service started on London–Paris route
13 December 1997	Ski trains started to French Alps
14 December 1997	Belgian high-speed line opened cutting London–Brussels journey time to 2 hours and 40 minutes
1 October 1998	Work started on CTRL between Channel Tunnel and London
11 March 1999	Eurostar Group formed
17 June 2002	Le Salon business lounge opened at Waterloo International
24 June 2002	The Lounge opened at Paris Gare du Nord
20 July 2002	Direct services started from Waterloo and Ashford to Avignon
16 January 2003	The Lounge opened at Brussels-Midi/Zuid
30 July 2003	<i>Eurostar</i> train sets new UK rail speed record of 334.7 km/h
16 September 2003	CTRL section 1 opened on time and on budget
28 September 2003	Passenger services started on first section of CTRL
18 November 2003	Carried 1 millionth passenger on first section of CTRL
12 January 2004	Record results announced for fourth quarter of 2003
26 February 2004	New uniforms introduced for terminal staff and train crew

(SNCB) and British Rail (BR). A subsidiary called European Passenger Services (EPS), which included BR's interest in *Eurostar*, was created prior to the UK rail privatization. This was sold to London & Continental Railways (LCR) in June 1996 and the company name was changed to Eurostar (UK) Ltd (EUKL) in October 1996.

In 1998, a management contract was awarded to InterCapital and Regional Rail Ltd (ICRR) to manage EUKL until 2010. The ICRR consortium is composed of the National Express Group (40% holding), SNCF (35%), SNCB (15%) and BA (10%)—a silent partner. A unified management structure called Eurostar Group was established in

September 1999 to create a business strategy and give some commercial direction. Each railway is represented on the Board. ■

#### **Acknowledgement**

This article is based on PR materials published by Eurostar.