



Rail passenger trust

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5th Floor, Holborn Gate,
26 Southampton Buildings, London WC2A 1AH
T + 44 (0) 20 7861 3080
W www.cie.uk.com
E enquiries@cie.uk.com

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Introduction





To update previous experimental research carried out to understand passengers' relationship with their train operating company (TOC), the extent to which they 'trust' operators and the factors help to create or diminish trust



To expand the previous research by enabling analysis to be carried out at TOC level (including separate key drivers analysis), particularly for franchised TOCs and for the UK nations



To understand the relationship between trust in TOCs and priorities for improvements (which is the second element of the research)



12,804 online interviews with GB rail passengers (who have travelled by rail in the last three months)



Fieldwork: 22nd March – 5th April 2017



Average interview length: 17 minutes



Sampling

Quotas set by:

- TOC (primarily) with some boosts
- Age
- Gender
- GB region/nation

See appendix for further details



Weighting

Applied by:

- Age and gender
- TOC passenger volumes

See appendix for further details



Key drivers analysis

Carried out at the overall level and individually by TOC to ascertain the key drivers of trust in TOCs

Train Operating Companies (TOCs) included in the research – number of interviews conducted per TOC (unweighted)



London and South East TOCs

	No. interviews n=
	461
	564
	388
	1,061
	596
	643
	587
	638
	633
	643
	381
	584

Long Distance TOCs

	No. interviews n=
	605
	622
	590
	842
	885

Regional TOCs

	No. interviews n=
	1,018
	653
	389
	1,133

Airport TOCs

	No. interviews n=
	330
	217
	202
	182

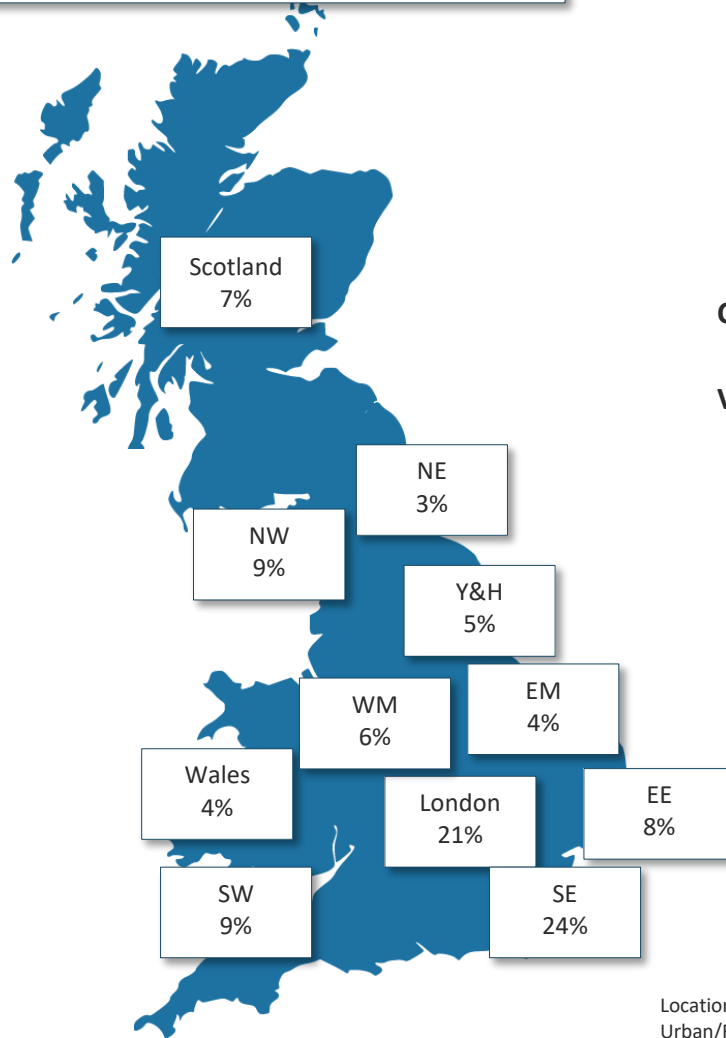
Open Access TOCs

	No. interviews n=
	238
	339



Profile of passengers – key demographics

Regional location



England 89%
 Wales 4%
 Scotland 7%

City/town 81%
 Village/isolated 19%

Small sample sizes were boosted to give a representative sample by region, age, gender and TOC journey. The percentages shown on the map are the weighted results. See appendix for further details on weighting.

Location: S4. In which of the following regions or nations do you live? (Base: 12,804)
 Urban/Rural: F8. How would you describe the location in which you live? (Base: 12,804)

An overview of trust in TOCs



Summary: Overview of trust (slide 1 of 2)

The **rail sector** is seen less positively than the NHS, supermarkets and airlines but **ahead** of banks and the energy sector

Trust levels vary considerably by TOC, with highest levels found amongst passengers of Heathrow Express and Heathrow Connect. Airport TOCs generally scored higher than other TOC sectors, with London and South East receiving the lowest levels of trust, and Southern the least trusted of all individual TOCs

Across location and passenger demographics, **trust in rail operators is higher** amongst those living in a **city/town**; **females**; those who are **over 65 years old** and who are **not working**. Trust is also significantly higher amongst those whose household income is **less than £25K**

Other factors also impact levels of trust:

- **Leisure and Business** passengers are more likely to trust rail than commuters
- Passengers who purchase a **single/return ticket** or a **pay-as-you-go** ticket tend to trust rail operators more than season ticket holders
- Those who travel during **off-peak times** or at **weekends** are more likely to trust rail
- Living a **further distance away from a train station** drives greater levels of trust
- Passengers who **have heard something** about TOCs have higher levels of trust. This is reinforced if the news is **positive** or a **mix of positive and negative news**

To provide context to the trust scores as measured in this study, we compared data with the same question as it is asked in the **National Rail Passenger Survey**. At an overall level, the **scores are virtually identical**, and the scores at TOC level are, in the main, very similar

Summary: Overview of trust (slide 2 of 2)

The **most important driver of trust is punctuality/reliability**. There is likely a connection between this and the fact that commuters have the lowest levels of trust as do those travelling at peak times and using season tickets

This research looks at three dimensions of trust:

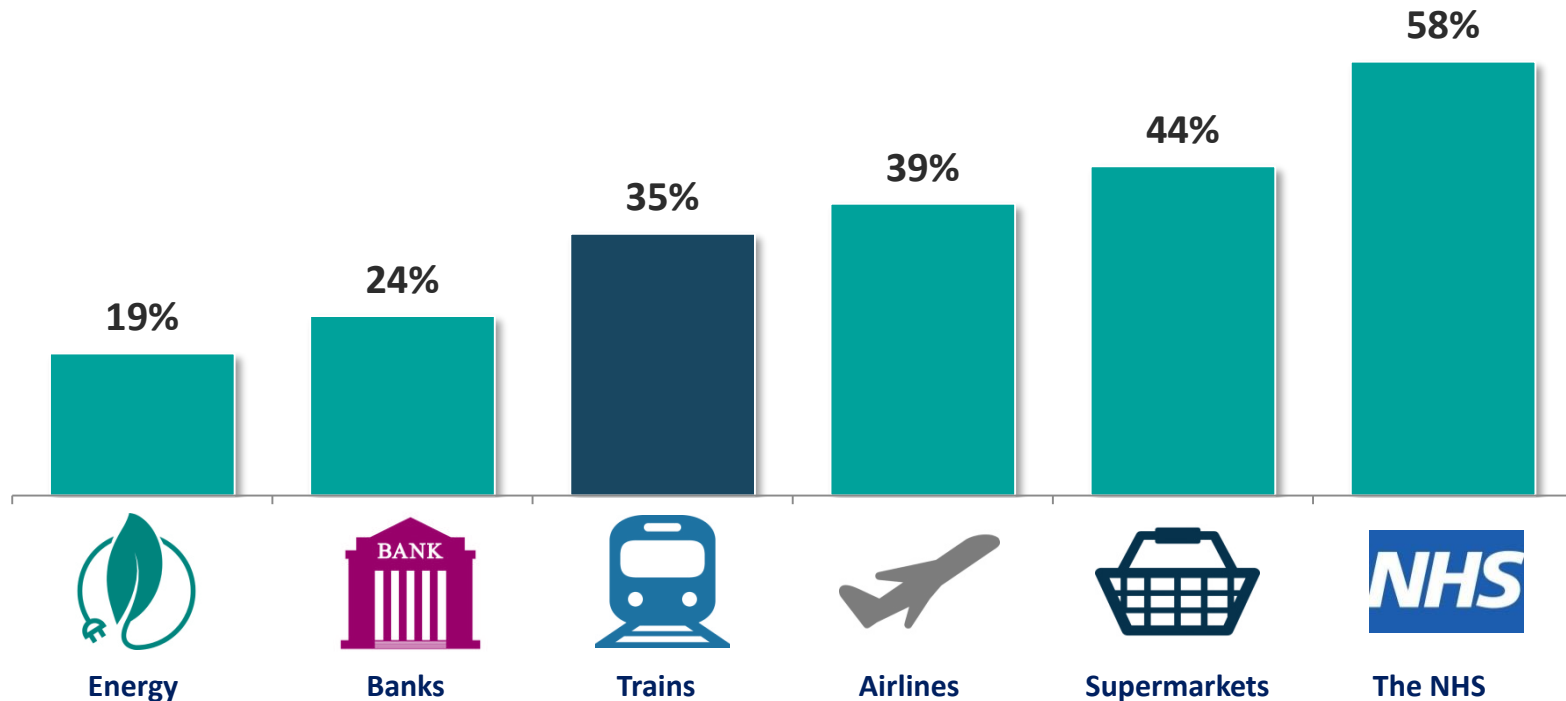
- Trust in **Competence**: *punctuality/reliability* is the most important hygiene factor; if this isn't right then trust just isn't possible
- Trust in **Motive**: a number of these attributes are important to help provide passengers with a sense that the train company is looking out for them (and not purely driven by commercial goals): *treating customers fairly, on my side* and *communicating well* can all help drive up levels of trust
- Trust in **Judgement**: passengers are also looking at the overall judgement of train companies: are they *truthful*, do they *act with honesty and integrity*, do they have *high principles* and do they have a *good reputation*? People look to all of these things to gain a sense of whether or not a train company is trustworthy

In conclusion, we suggest that building trust in a train company is a tricky balance of:

- Doing what you're supposed to do (getting people where they want to go at the time they expect to get there)
- Showing that you care about customers (having a human sense of treating people well and fairly)
- Being seen to have ethics and principles (being a 'good' company that has a strong moral compass)

The rail sector performs 'mid field' when it comes to overall positivity – behind NHS, supermarkets and airlines, but ahead of energy and the banks

% Level of positivity towards sectors 2017 – % positive about sector (8-10)



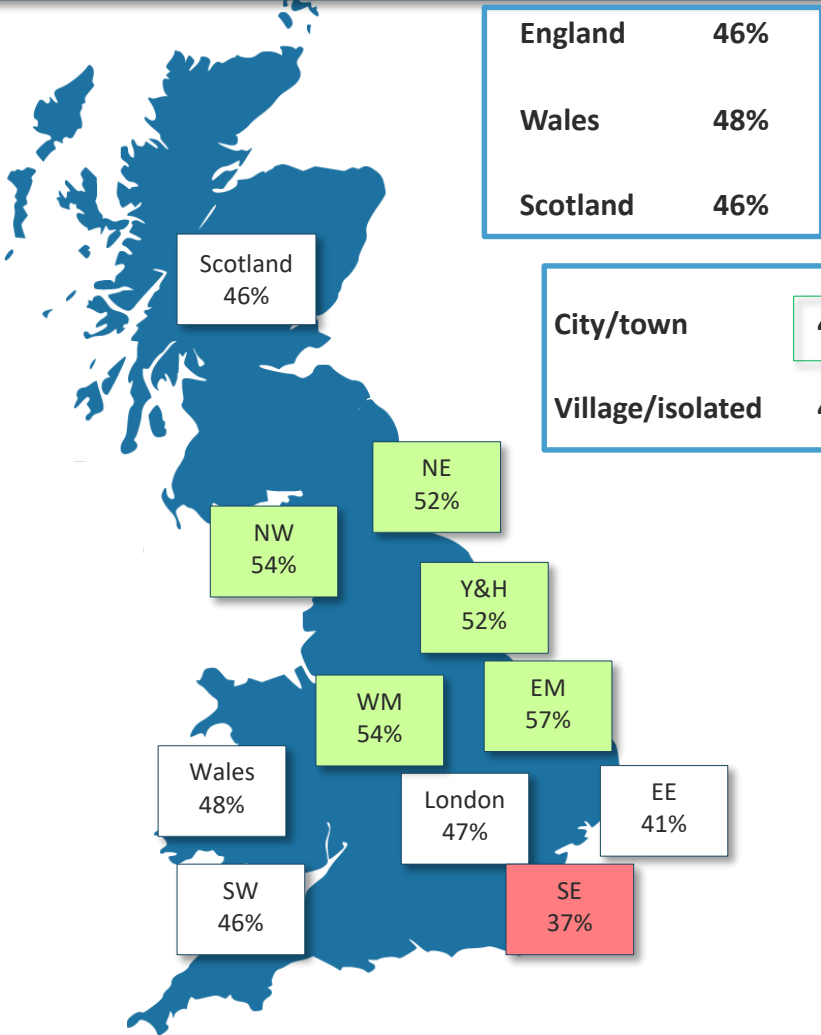
S9. Please rate your feelings towards each of the industries below, using a scale where 0 is "Extremely negative" and 10 is "Extremely positive" and thinking overall about the range of businesses within each of these areas (Base: 12,804)



Levels of trust in TOCs vary by location and passenger demographics

% Trust in TOC (top 2 box) – by location

England	46%
Wales	48%
Scotland	46%



City/town	47%
Village/isolated	44%

% Trust in TOC – by gender

Males 43%

Females 48%



% Trust in TOC – by age

16-25 45%

26-44 43%

45-64 44%

65+ 55%

% Trust in TOC – by employment status

Working 43%

In education 44%

Not working 53%



% Trust in TOC – by household income (p.a.)

<£25K 50%

£25K-£55K 47%

>£55K 42%



 = More likely to trust TOC(s) used for most frequent journey

Trust is lowest for commuters and this follows through in terms of ticket type, day/time of travel and distance from nearest railway station



% Trust in TOC – by most frequent journey type



Commuting	38%
Business	42%
Leisure	50%

% Trust in TOC – by type of ticket used for most frequent journey



Single/Return	47%
Pay As You Go	48%
Season Ticket	41%

% Trust in TOC – by time of the week travelled most frequently



Weekday - peak	42%
Weekday – off-peak	48%
Weekend	45%

% Trust in TOC – distance from nearest railway station



< 2 miles	44%
3-10 miles	47%
>10 miles	49%

% Trust in TOC – by whether heard anything about TOCs



Yes – heard something	48%
No – have not heard anything	43%

% Trust in TOC – by what have seen/heard about TOCs

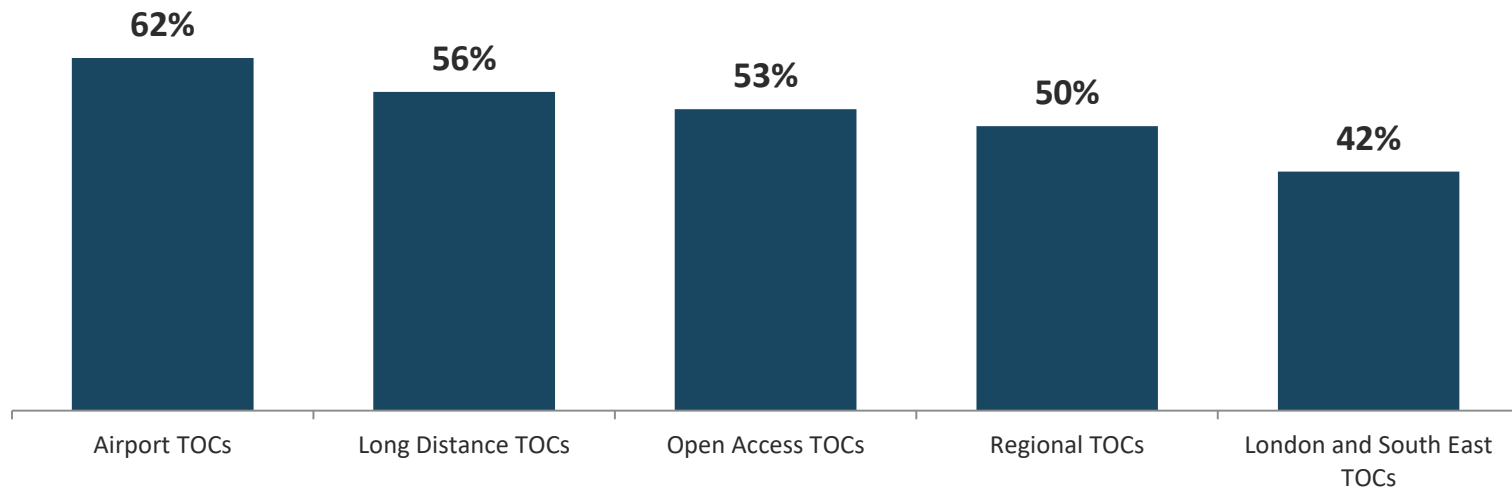


Generally positive	77%
Mixed	49%
Generally negative	25%

= More likely to trust TOC(s) used for most frequent journey

Trust is highest for passengers of airport TOCs, however this drops for passengers of London and South East TOCs

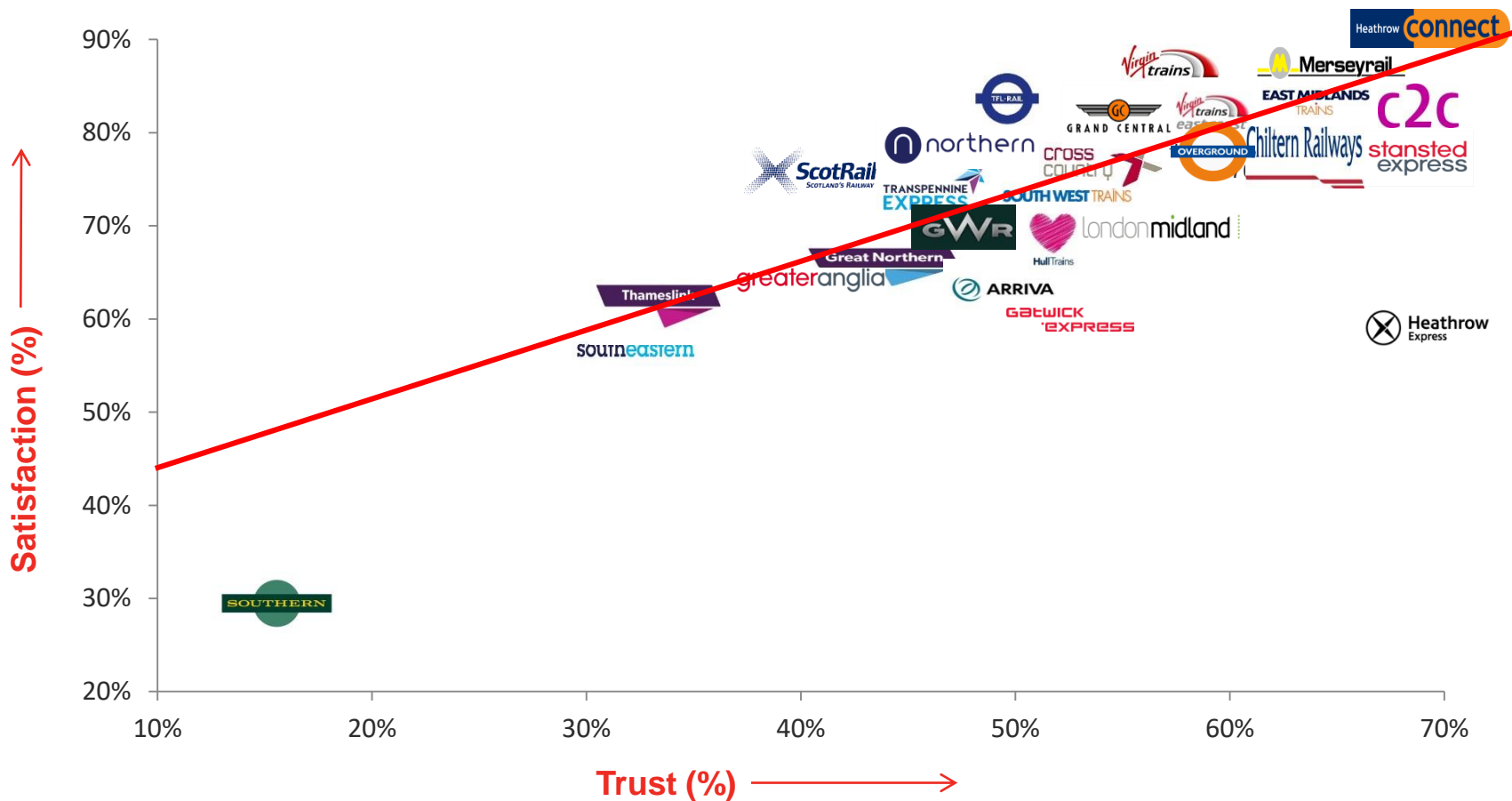
% Trust in TOC – by sector



B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'?
(Base: 12,804; Airport TOCs: 931; Long Distance: 3,541; Open Access: 577; Regional: 3,365; London and South East: 6,639)

Not surprisingly, there is a strong correlation between trust and satisfaction with TOCs, with Heathrow Express and Southern the notable outliers

Relationship between satisfaction and trust – top 2 box %

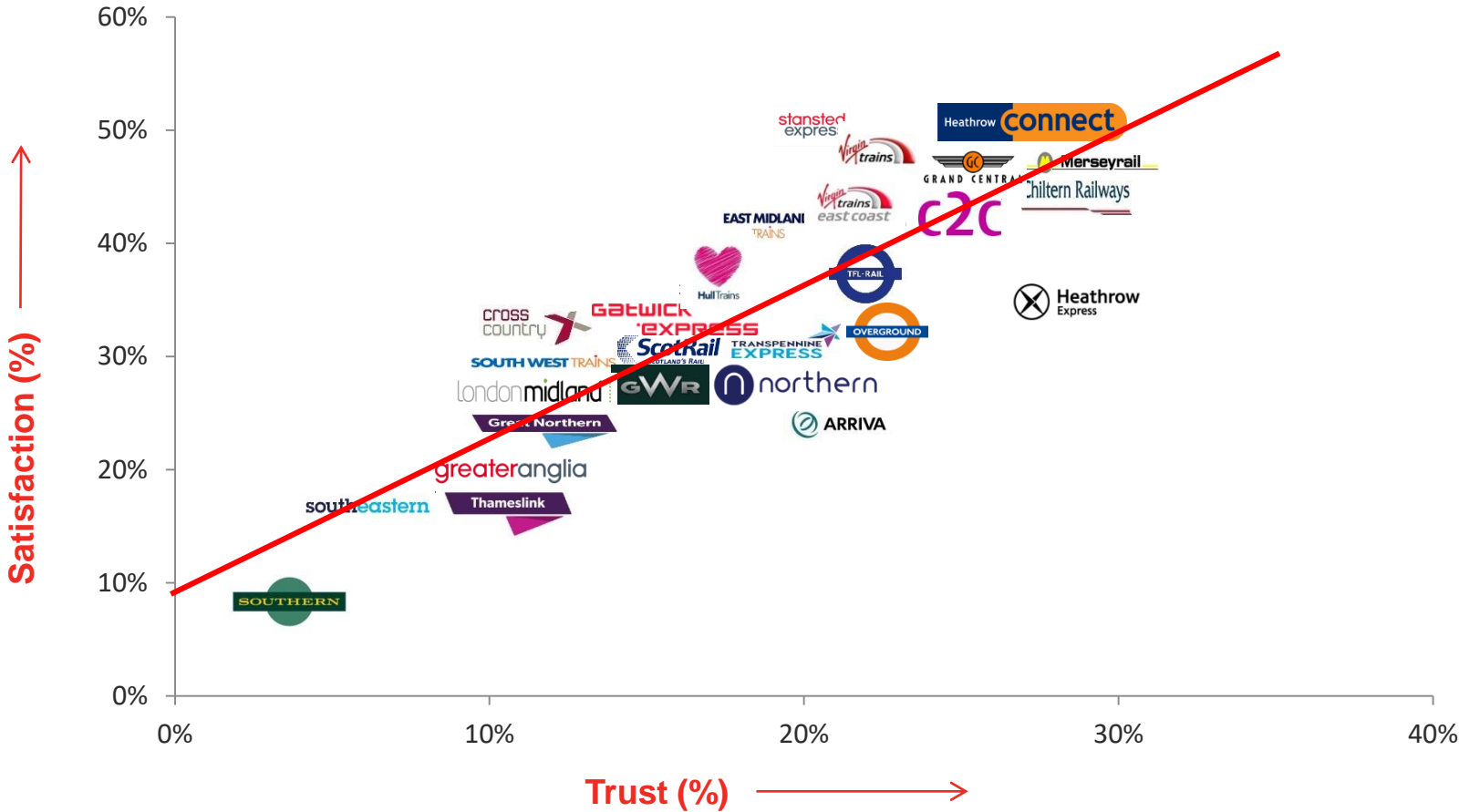


B6. To what extent do you satisfied or dissatisfied with [TOC] for the journey you make most often?

B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'? (Base: 12,804)

The strong correlation between trust and satisfaction is even more evident when reviewing top box scores for these metrics

Relationship between satisfaction and trust – top box %



B6. To what extent do you satisfied or dissatisfied with [TOC] for the journey you make most often?

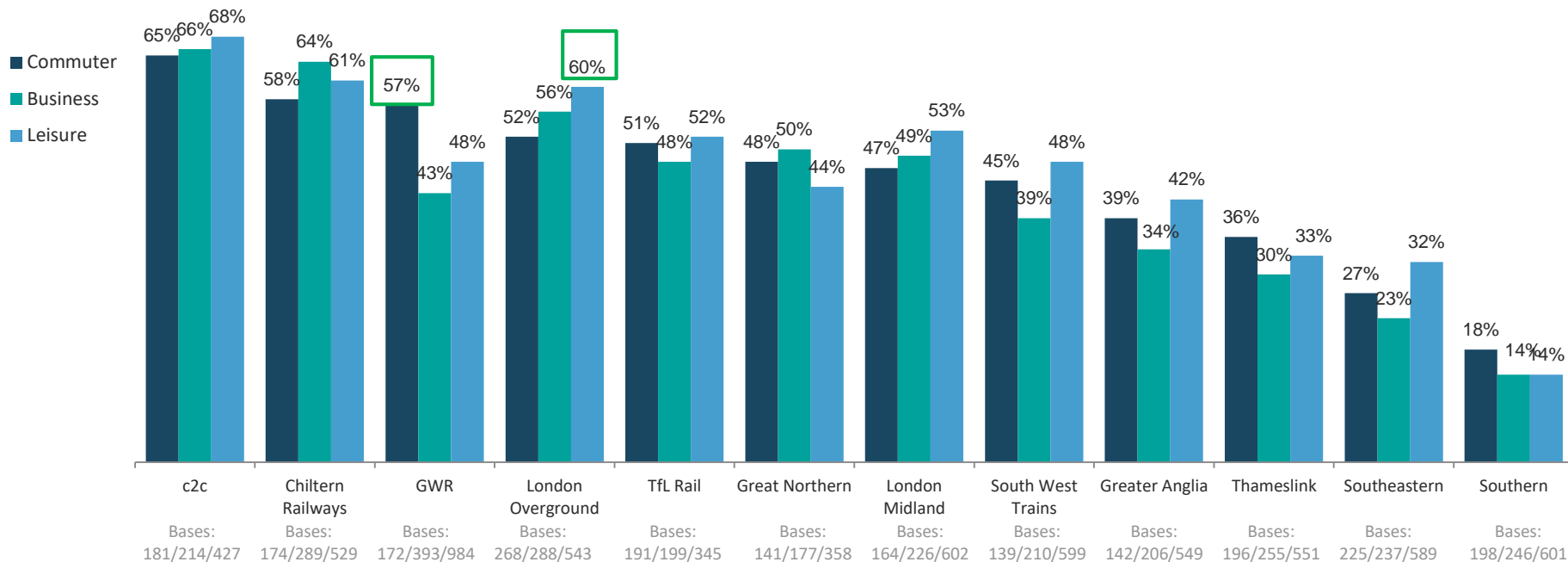
B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'? (Base: 12,804)

Levels of trust vary by journey purpose within London and South East TOCs

Journey purpose within London and South East TOCs - % Trust (top 2 box)

 = Significantly higher

London and South East TOCs

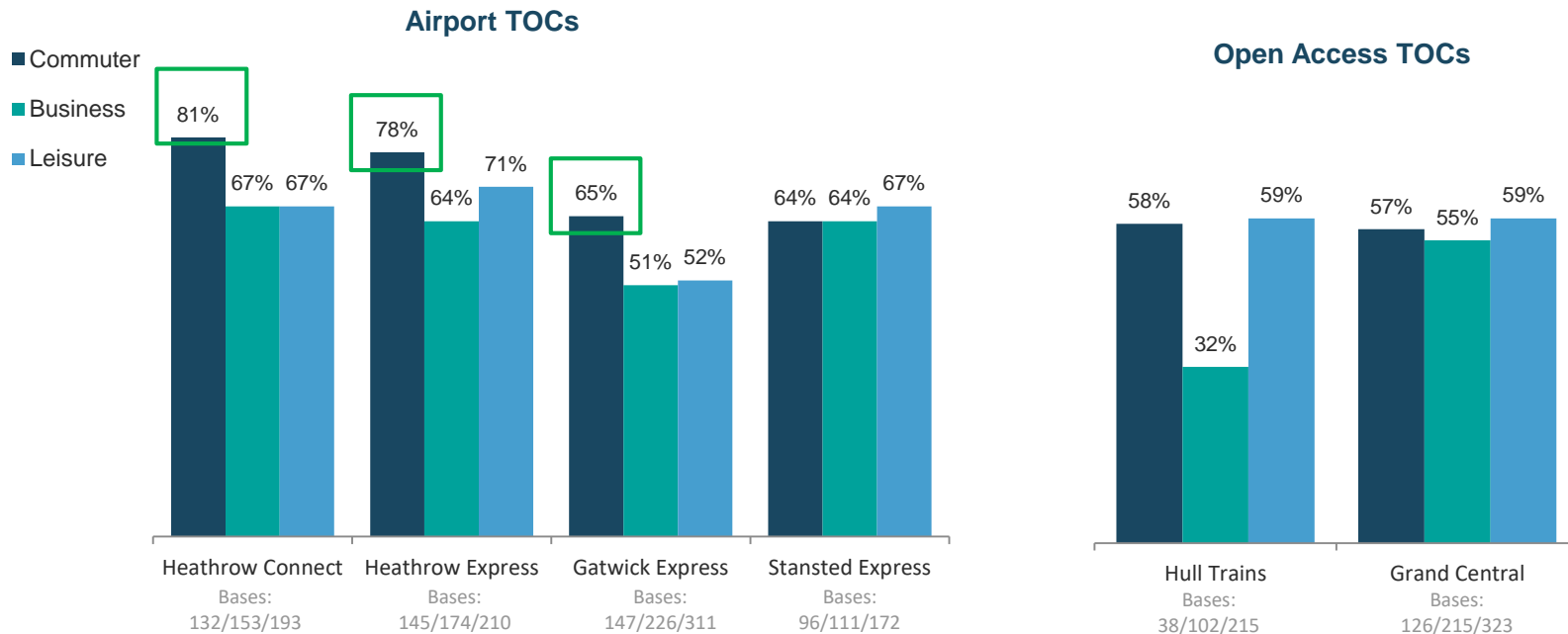


S5A-C. How often, if at all, do you travel by train (excluding underground, tram or other metro services or heritage rail trips) when travelling [to from work/education, on company business, personal reasons]?
 B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'? (Base: 12,804)

Within airport TOCs commuters are more likely to have higher levels of trust

Journey purpose within airport and Open Access TOCs - % Trust (top 2 box)

 = Significantly higher



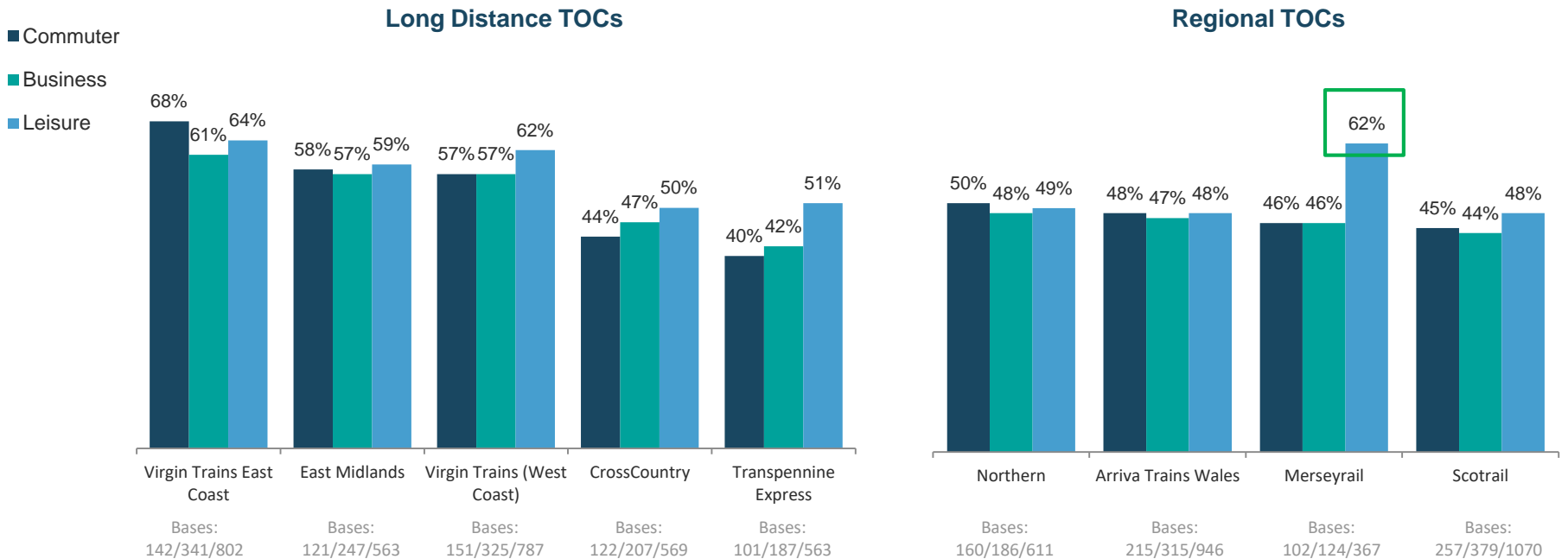
NB: Low base size for Hull Trains commuters

S5A-C. How often, if at all, do you travel by train (excluding underground, tram or other metro services or heritage rail trips) when travelling [to/from work/education, on company business, personal reasons]?
 B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'? (Base: 12,804)

Trust levels are fairly consistent by journey purpose for Long Distance and Regional TOCs, although leisure passengers are more likely to trust Merseyrail

Journey purpose within long distance and regional TOCs - % Trust (top 2 box)

62% = Significantly higher



S5A-C. How often, if at all, do you travel by train (excluding underground, tram or other metro services or heritage rail trips) when travelling [to from work/education, on company business, personal reasons]?
 B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'? (Base: 12,804)

Key drivers of trust in TOCs



Context: our approach to trust looks at three different dimensions which are each made up of a set of variables:



JUDGEMENT

- They have high principles
- They are truthful in what they say
- They do the right thing even when no one is looking
- They have a good reputation in the industry
- They are progressive in developing services that meet passengers' needs
- They act with honesty and integrity
- They show leadership in the rail industry
- Employees seem proud to work for the company



MOTIVE

- They are on my side
- They treat me as an individual
- They treat me as a valued customer
- They build long-term relationships with their customers
- They treat customers fairly
- They communicate well with their customers



COMPETENCE

- They are good at resolving problems
- They have helpful staff on the trains
- They have helpful staff at the stations
- Their train services are punctual/reliable
- Their train ticket prices offer good value for money

Summary: Key drivers of trust

A key driver analysis was carried out at the overall level and individually by TOC to ascertain the key drivers of trust in TOCs

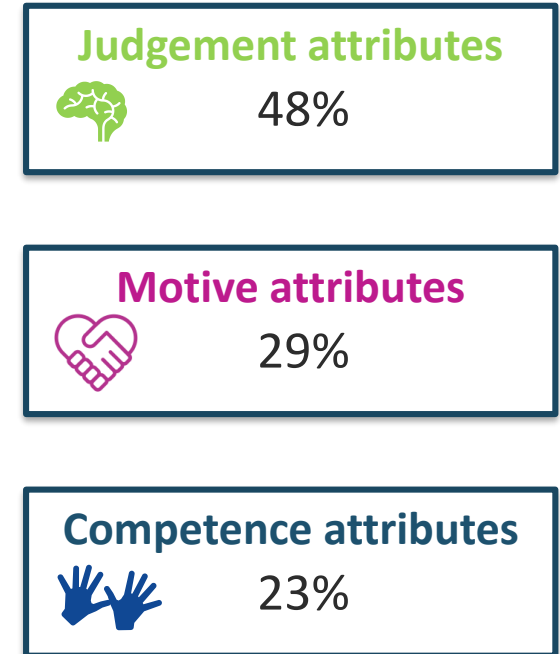
- Overall, **punctuality/reliability** is the key driver of trust in 2017
- This is followed by having a **good reputation** in the industry and (in joint third position) **treating customers fairly, being progressive** in developing passenger services, and acting with **honesty and integrity**
- Most of the top ten drivers relate to the judgement dimension of trust, specifically being seen to act ethically; both towards customers (acting with honesty and being truthful), and compared to the rest of the industry (having a good reputation and showing leadership)
- The performance of train services themselves is much more important in driving trust than the performance of individual staff members; having helpful staff at train stations and on trains are the joint lowest key drivers and employees seeming proud to work for the company is the third joint lowest driver
- When looking at the matrices which map performance against importance for the attributes driving trust, there are very few TOCs performing strongly on all of the most important attributes. This suggests that there are areas where TOCs need to focus in order to maintain trust (for the few strong performers) or to increase it (for the majority of TOCs)

Punctuality/reliability is the key driver of trust in TOCs, but the majority of other key drivers relate to judgement and then motive dimensions, rather than competence

% key drivers – overall importance score



Order of derived importance






D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 12,804)

Context: deriving net trust scores for the three dimensions of trust




JUDGEMENT

- They have high principles
- They are truthful in what they say
- They do the right thing even when no one is looking
- They have a good reputation in the industry
- They are progressive in developing services that meet passengers' needs
- They act with honesty and integrity
- They show leadership in the rail industry
- Employees seem proud to work for the company

 **Net trust in judgement** =  % answering 5-7 at 6+ statements —  % answering 1-3 at 6+ statements


MOTIVE

- They are on my side
- They treat me as an individual
- They treat me as a valued customer
- They build long-term relationships with their customers
- They treat customers fairly
- They communicate well with their customers

 **Net trust in motive** =  % answering 5-7 at 5+ statements —  % answering 1-3 at 5+ statements

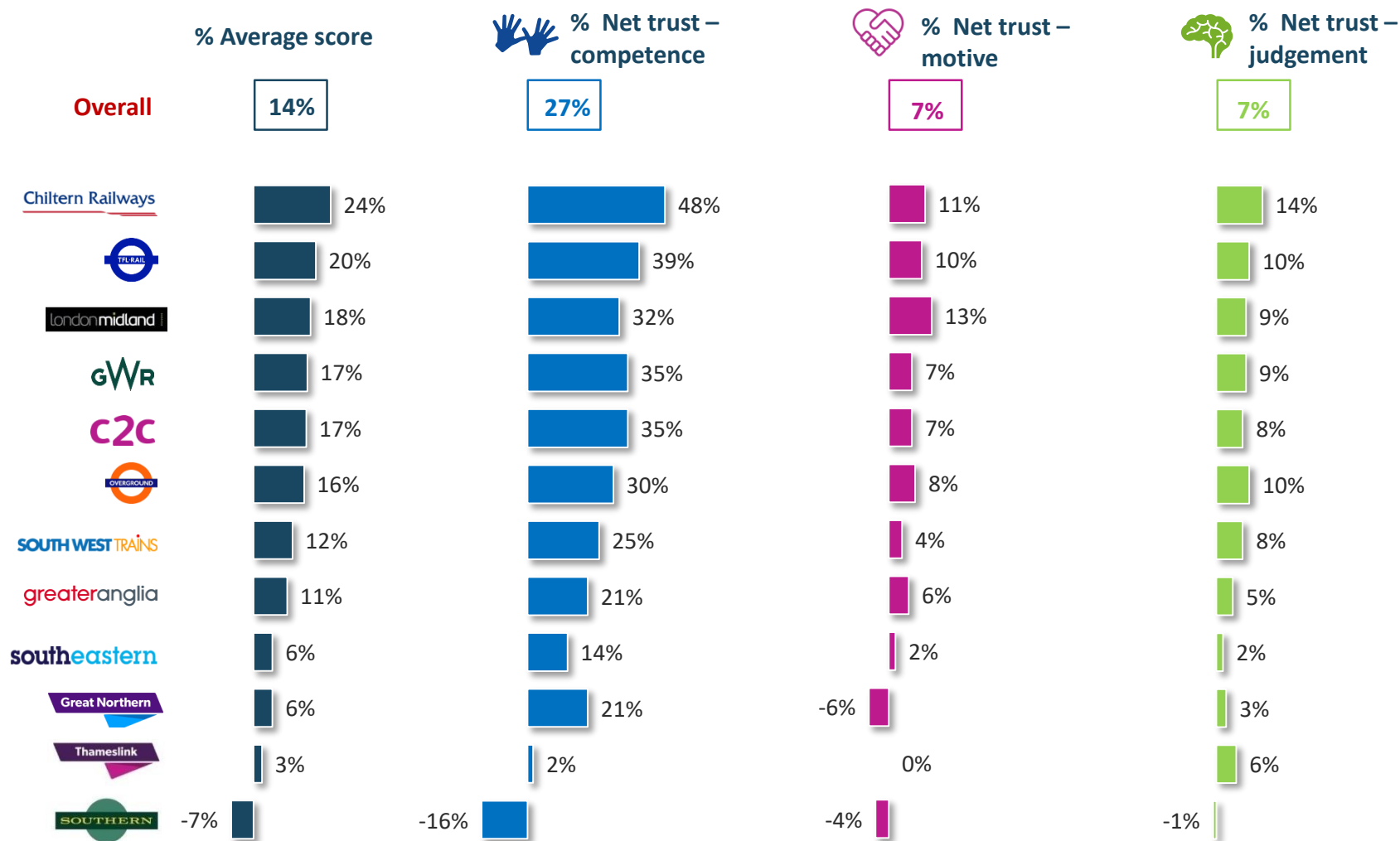
COMPETENCE

- They are good at resolving problems
- They have helpful staff on the trains
- They have helpful staff at the stations
- Their train services are punctual/reliable
- Their train ticket prices offer good value for money

 **Net trust in competence** =  % answering 5-7 at 4+ statements —  % answering 1-3 at 4+ statements

While net scores vary between London and South East TOCs, as a group they perform worse than other groups in terms of passenger trust in their motive and judgement

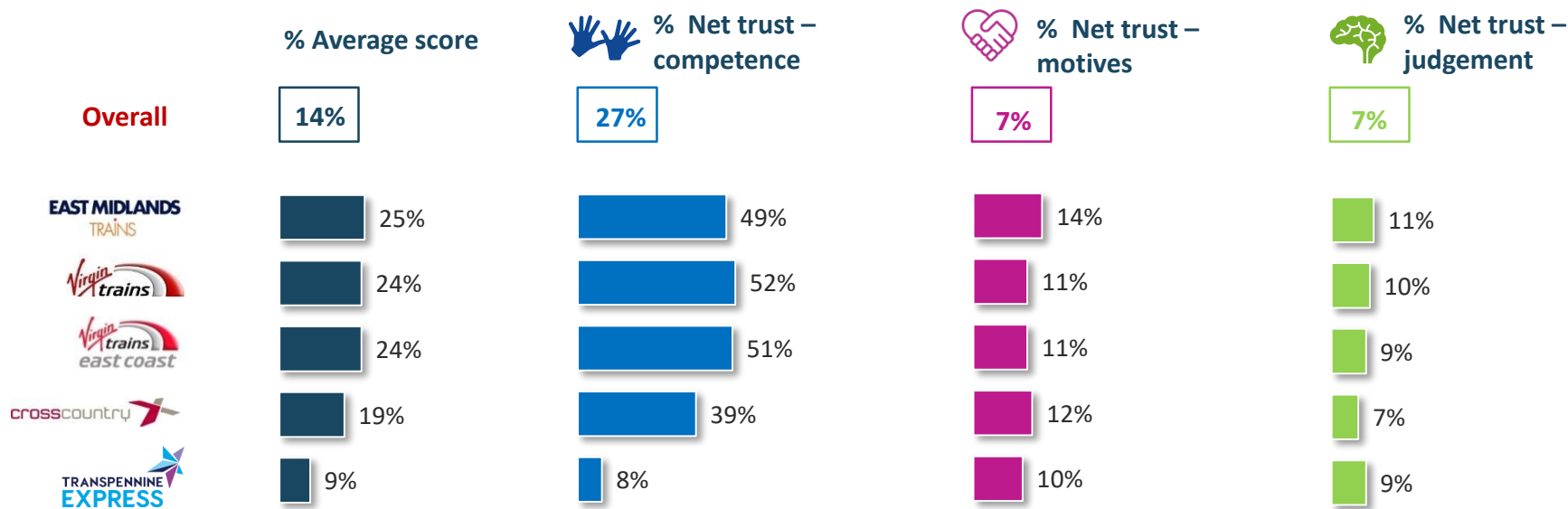
% Net trust scores – London and South East TOCs



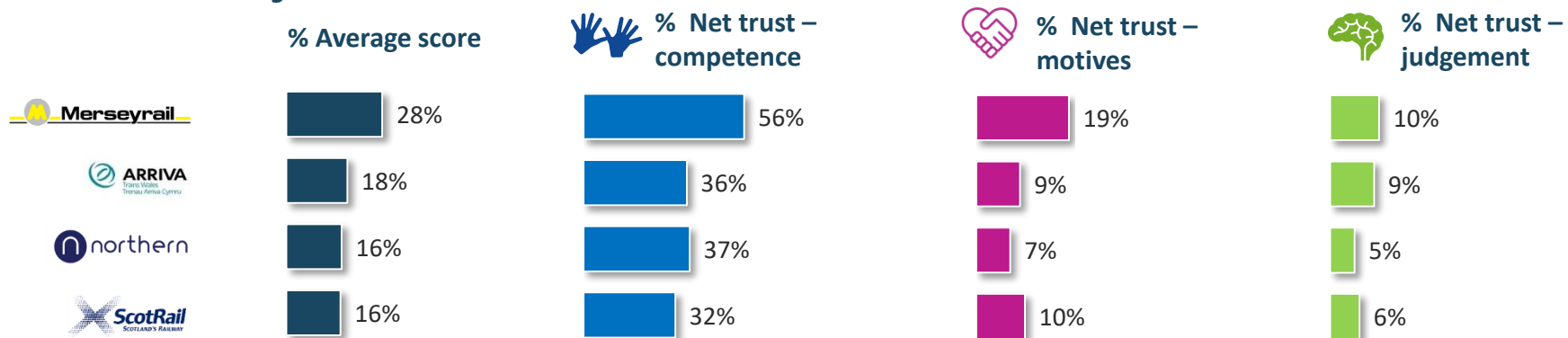
D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Overall, Long Distance TOCs are more likely to receive higher net trust scores for competence

% Net trust scores – Long Distance TOCs



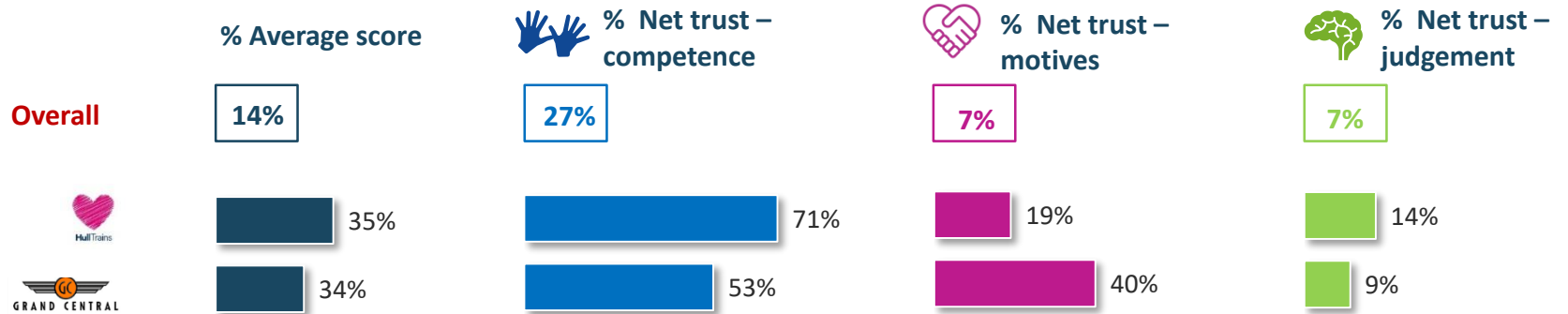
% Net trust scores – regional TOCs



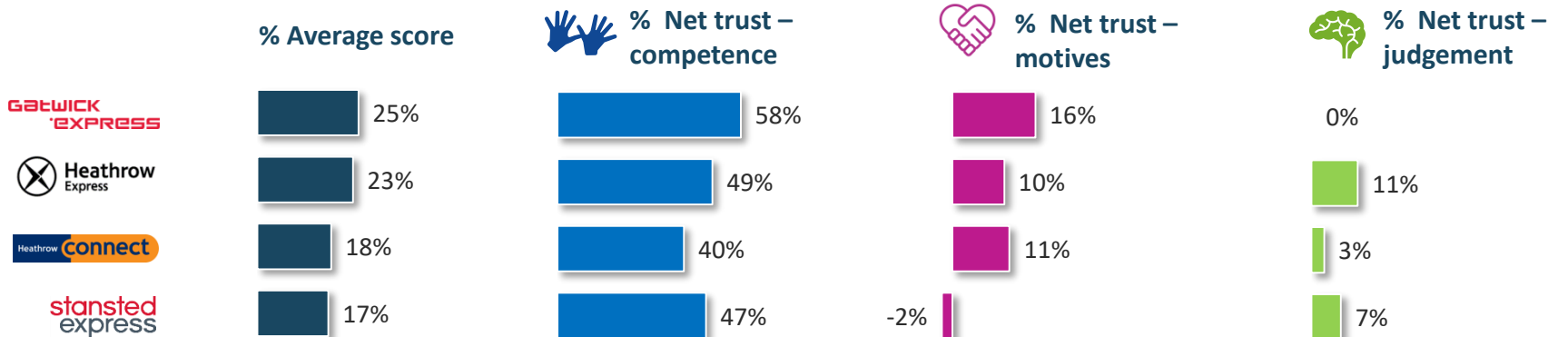
D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Across the three dimensions of trust the Open Access TOCs receive the highest net trust scores. Airport TOCs perform well in terms of trust in competence

% Net trust scores – Open Access TOCs



% Net trust scores – airport TOCs



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

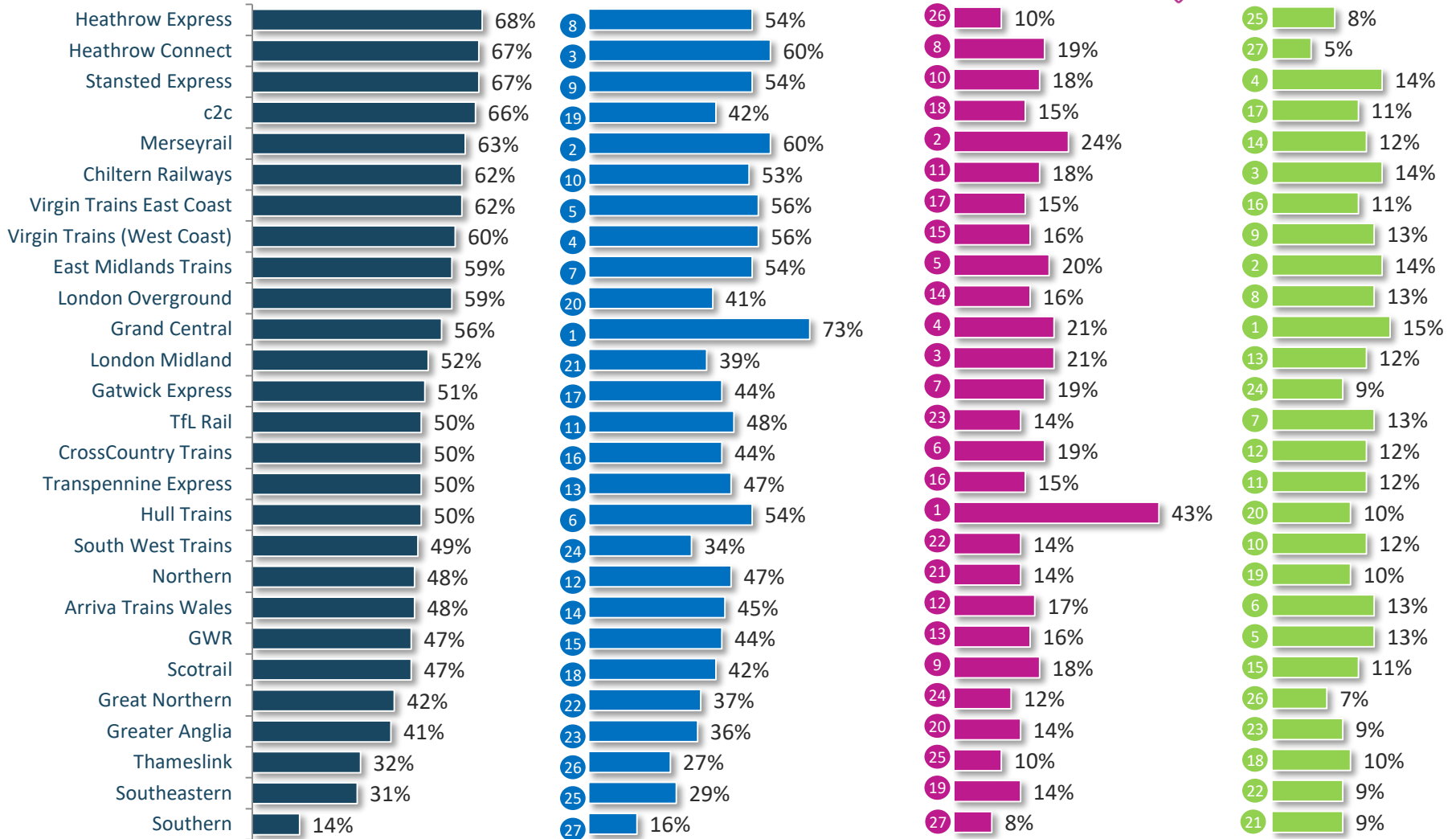
There is a stronger relationship between overall trust and trust in competence than there is with the other two dimensions, underlining the importance of fundamentals such as punctuality/reliability in driving overall trust

% Trust – overall

% Trust – competence 

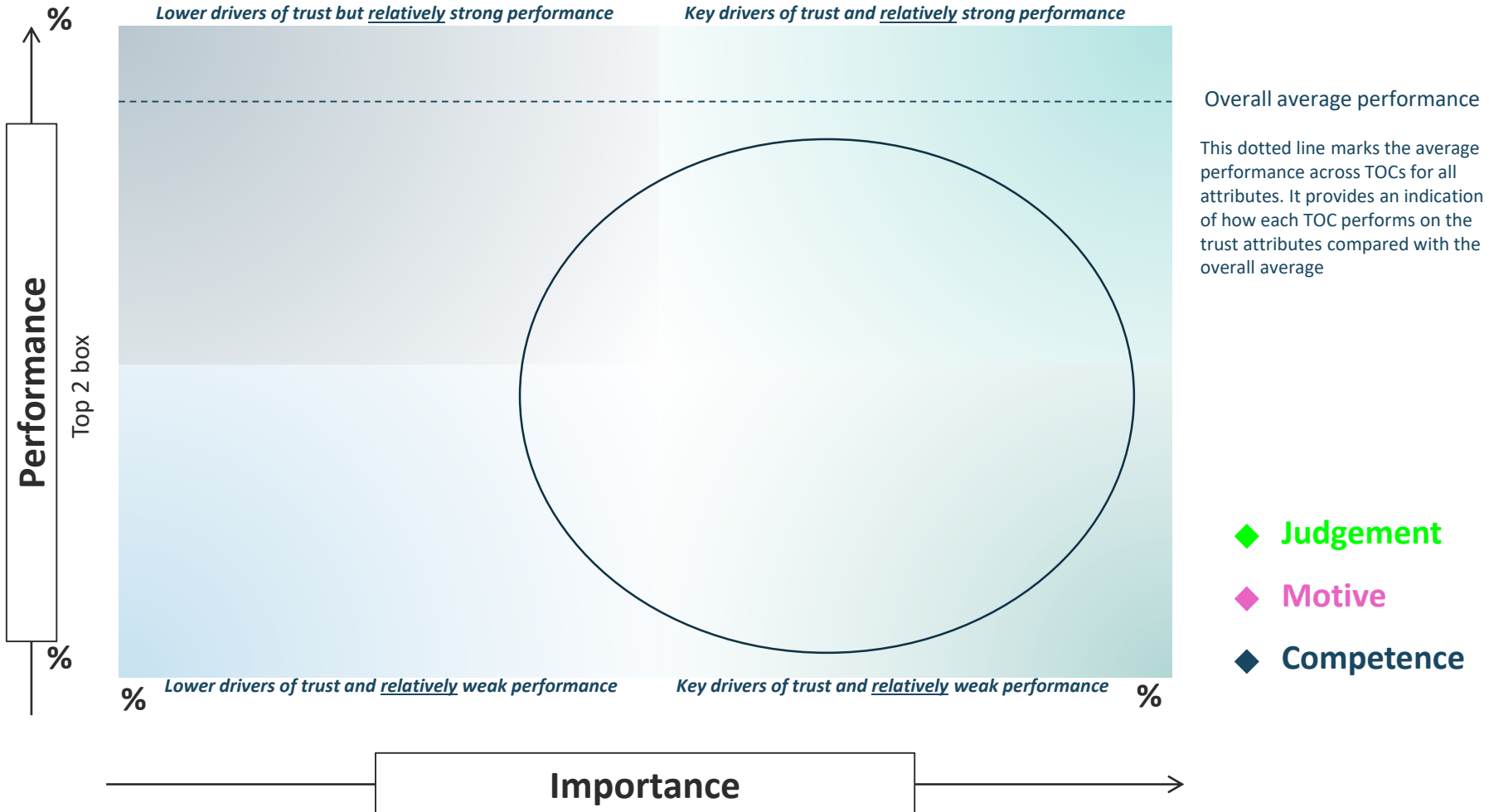
% Trust – motives 

% Trust – judgement 



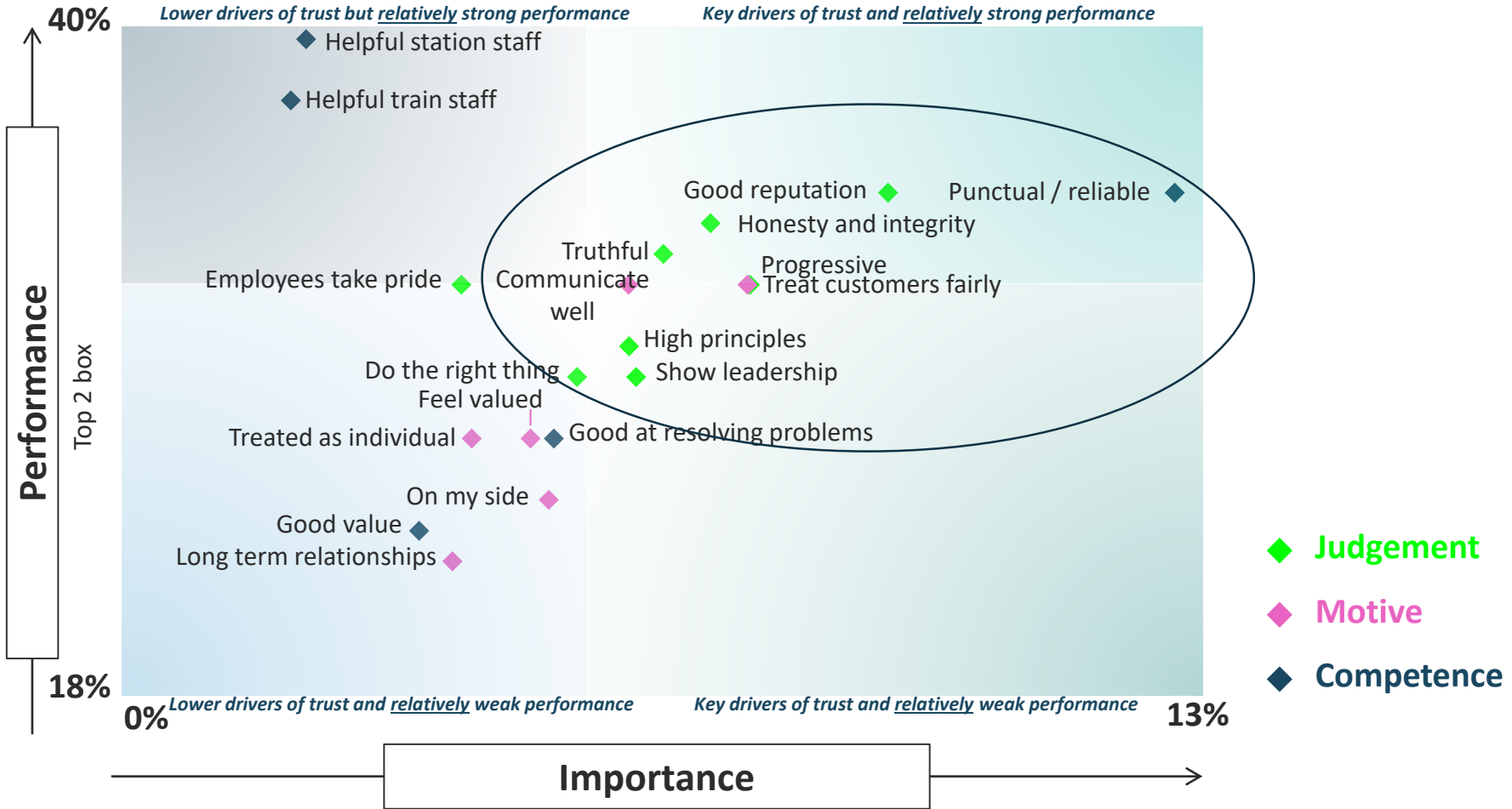
The following slides look at the relationship between the derived importance of attributes in driving trust and performance on those same attributes. The analysis is used to identify which areas to focus on to drive up overall levels of trust

For each attribute included in the study, the calculated importance of that attribute in explaining trust is plotted against the performance for that attribute (top 2 box – scoring 6 or 7 out of 7). This enables us to identify areas of individual strength and weakness. There are four broad areas of the map, as described below. The ‘oval’ provides an indication of those attributes to focus on to increase levels of trust



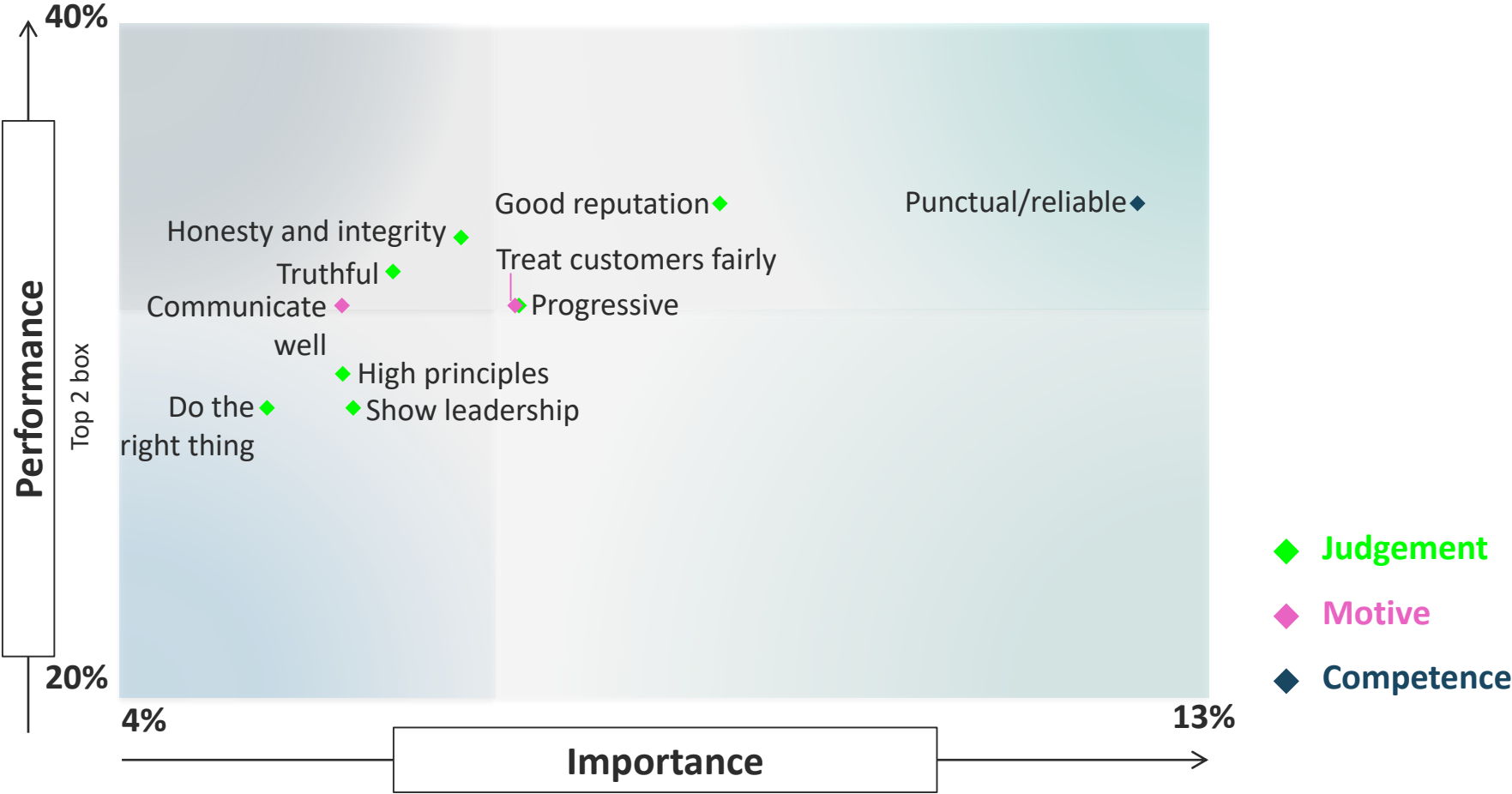
At an overall level, punctuality/reliability is the main driver of trust, with other key drivers related to judgement and motive attributes. Continuing to focus on punctuality is a priority, alongside actions that demonstrate leadership and principles to drive up perceptions of reputation and honesty/integrity

Those attributes sitting within the oval shape are the main areas to focus on



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 12,804)

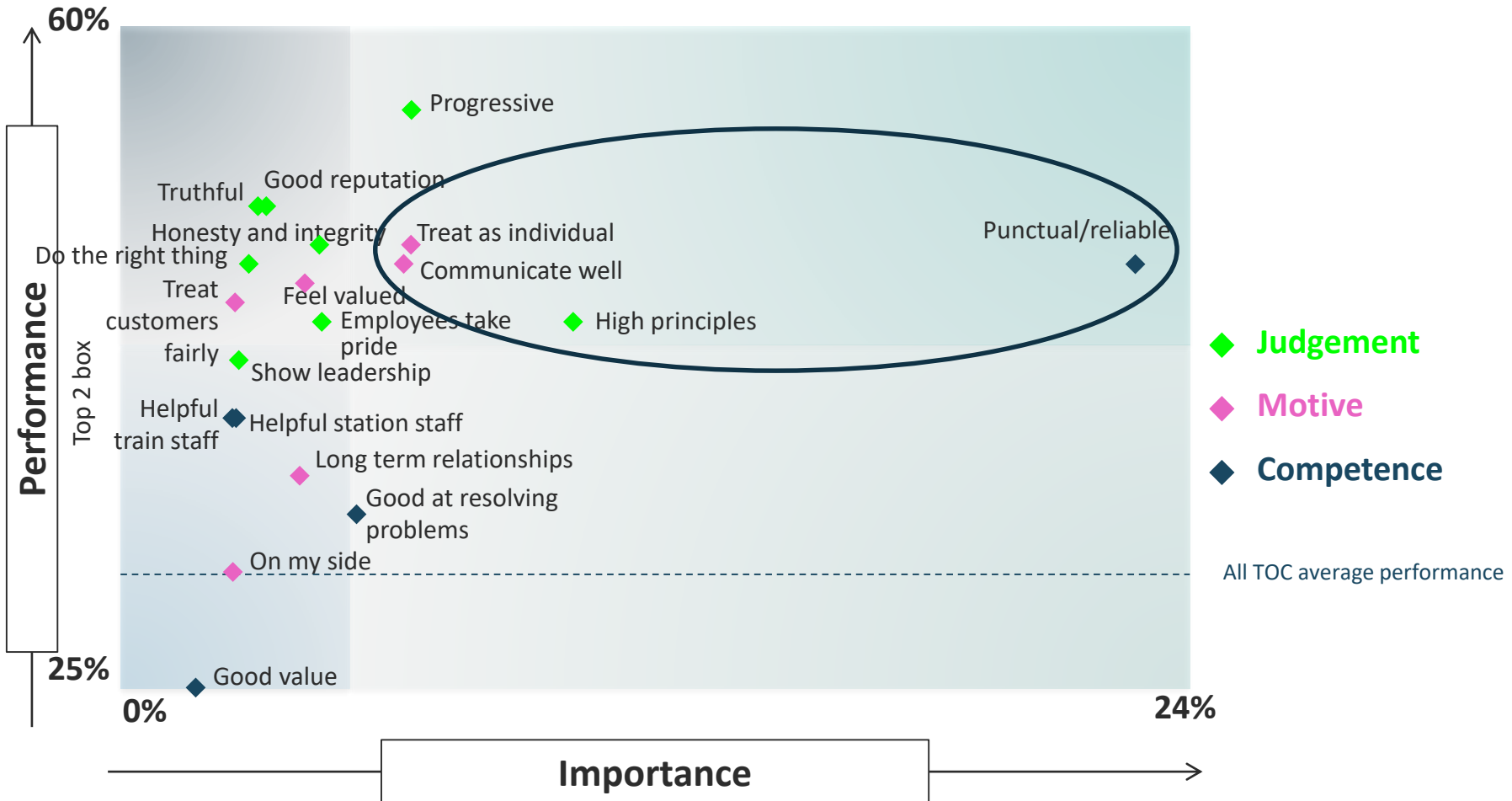
Overall: Top 10 drivers of trust



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 12,804)

Heathrow Express: Being punctual/reliable is by far the most important driver of trust, so performance on this needs to remain a top priority. The current high trust score suggests this is currently not an issue, but any problems in this area would have a major impact and need to be handled carefully

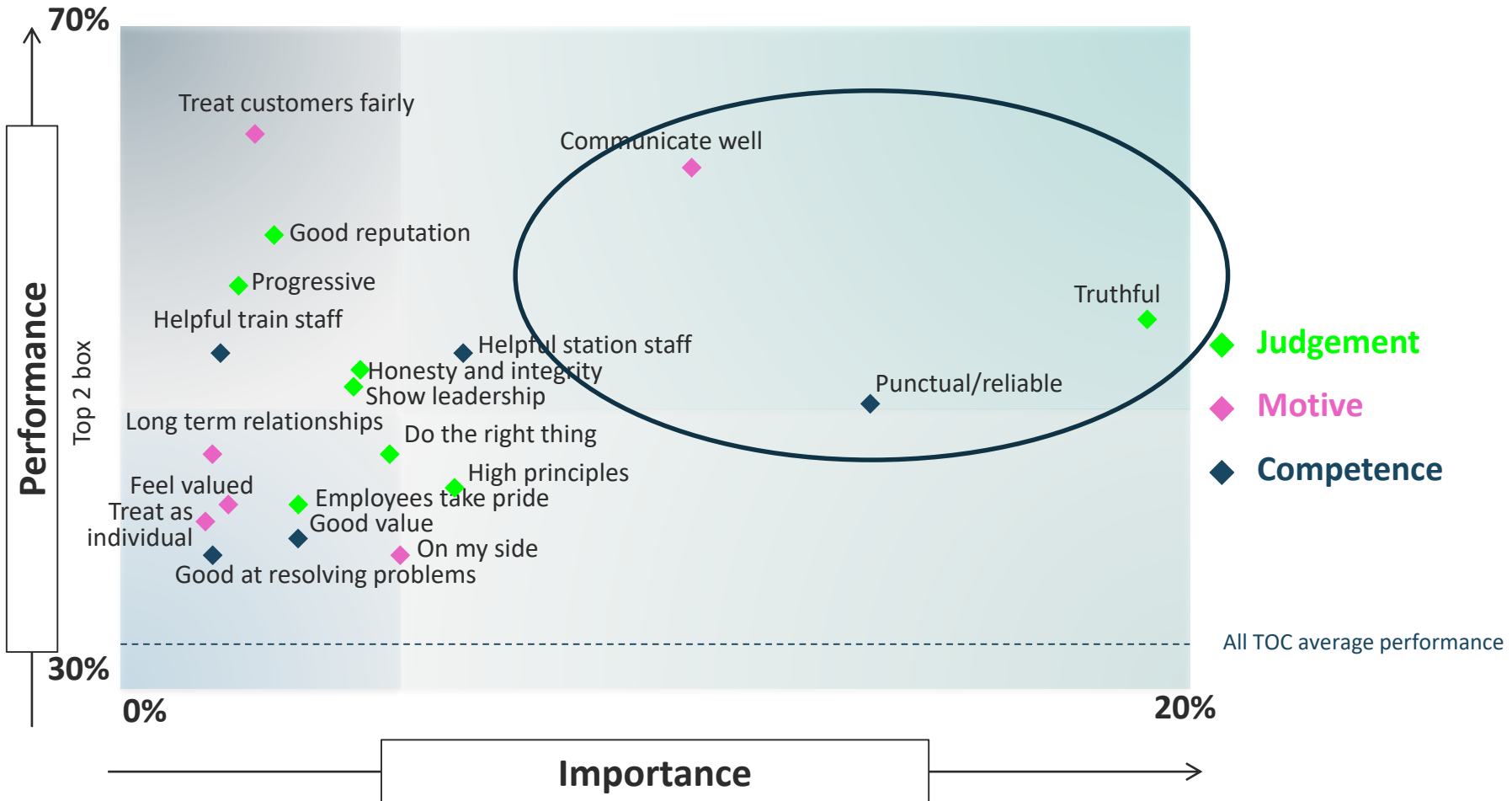
Trust score (top 2 box): 68%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 461)

Heathrow Connect: Being truthful, punctual/reliable and communicating well are the three most important areas for focus. The relationship between these three areas suggests that good, open communications are critical if there are any problems or delays to journeys

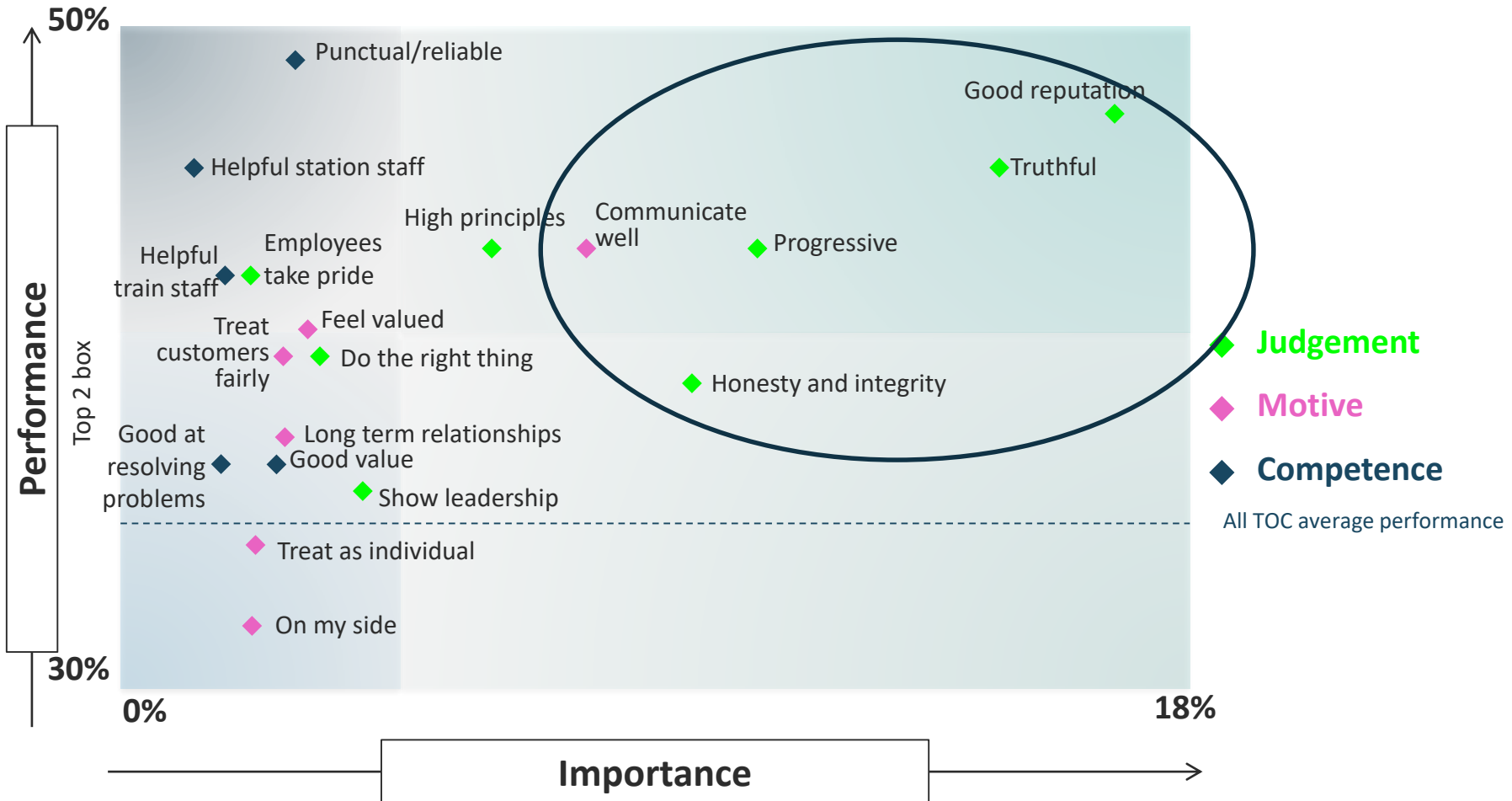
Trust score (top 2 box): 67%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 461)

Stansted Express: High levels of trust are based on a strong reputation and being truthful. Judgement attributes are the most important overall, so maintaining a good reputation is key. Punctuality/reliability is less important than might be expected, but strong performance in this area should be maintained

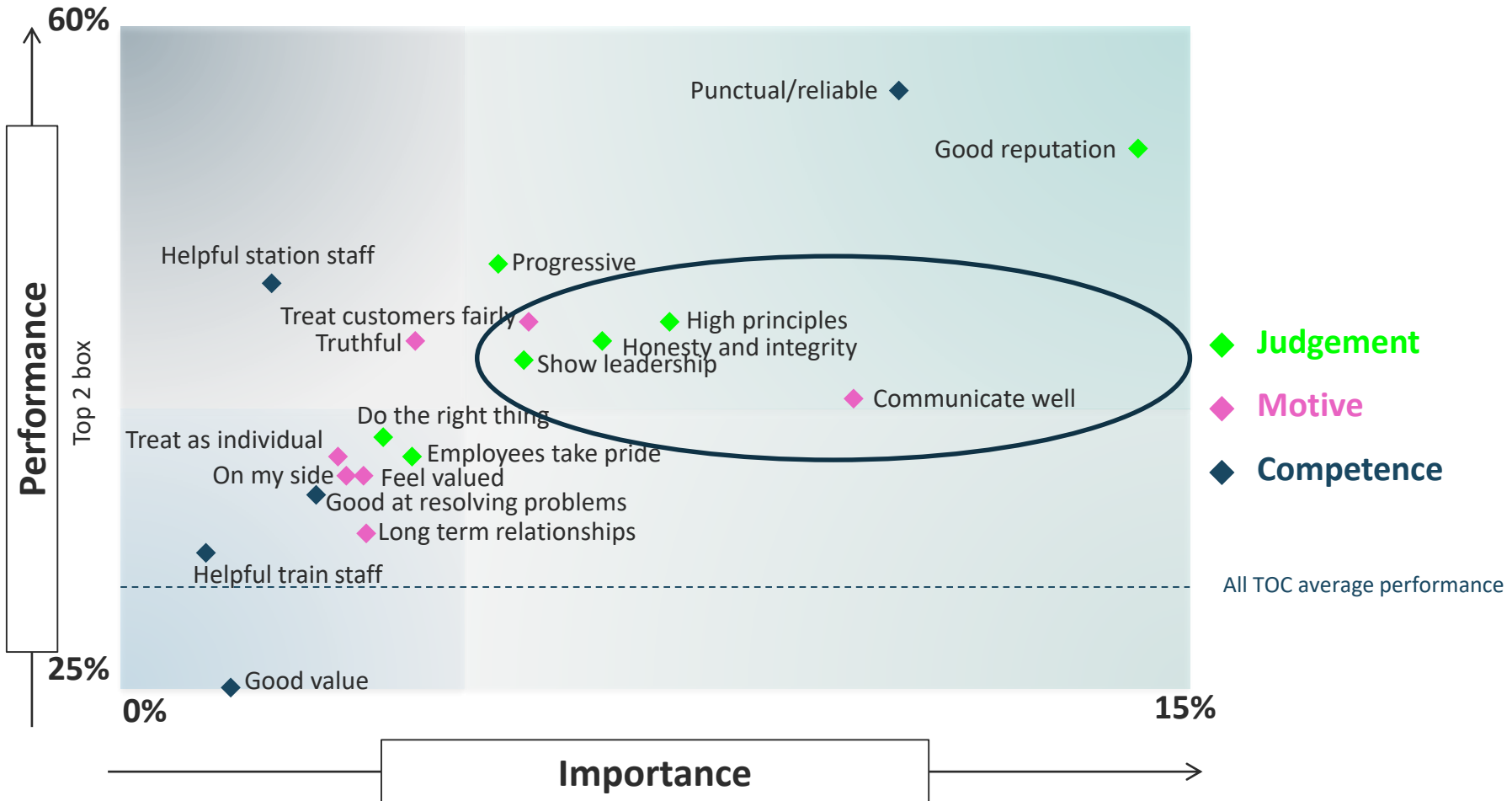
Trust score (top 2 box): 67%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 461)

c2c: Strong trust score, driven by above average performance on punctuality/reliability and reputation. To protect and grow trust, focusing on communication with customers is a priority, as well as a focus on judgement attributes, especially honesty/integrity and leadership

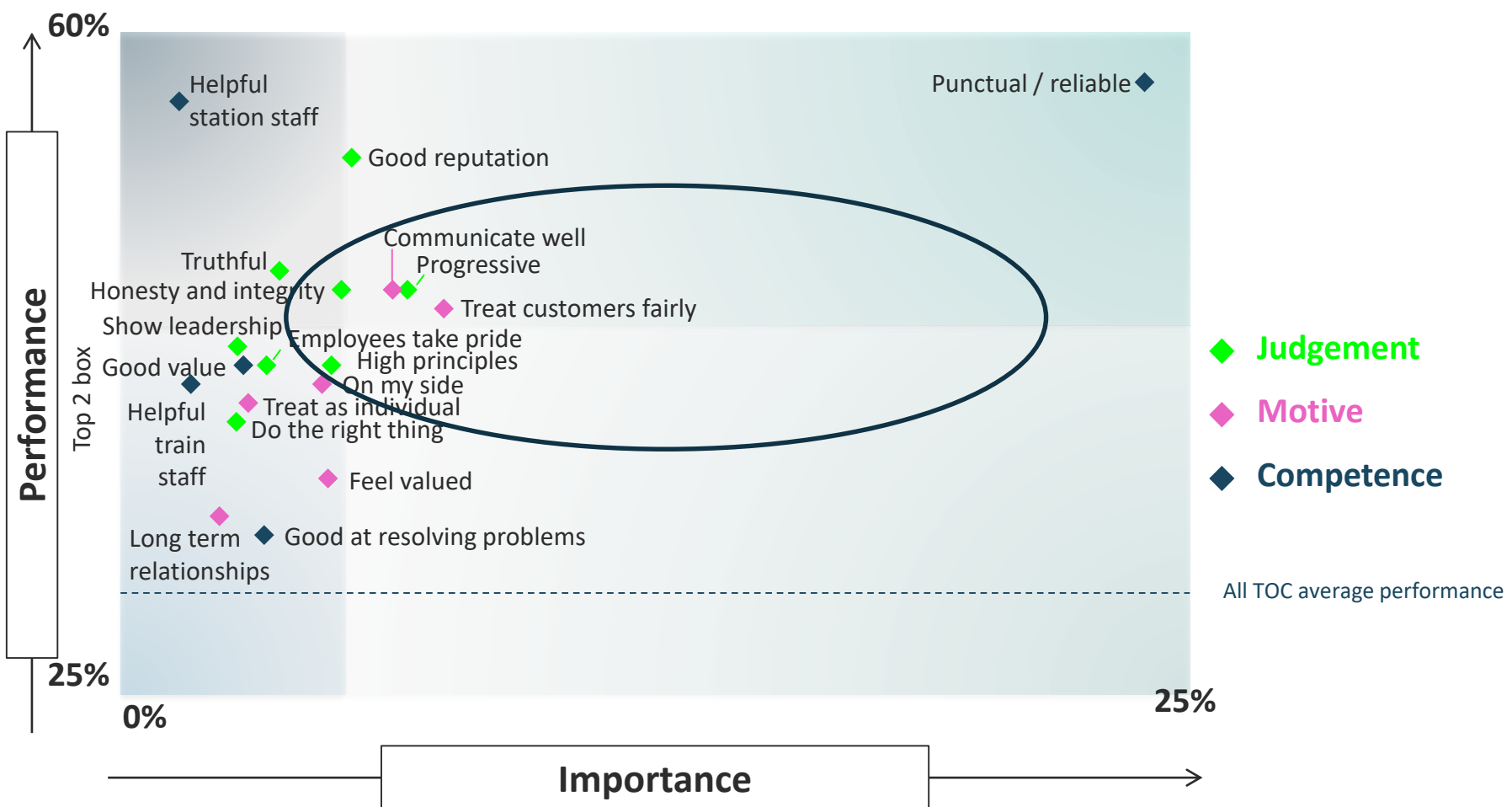
Trust score (top 2 box): 66%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 461)

Merseyrail: Punctuality/reliability is the overriding criterion driving trust, so it is essential to maintain this. To help protect the trust score, focus on treatment of customers (comms, fair treatment and being on their side). Everything here relies on punctuality/reliability, so all eggs are in one basket

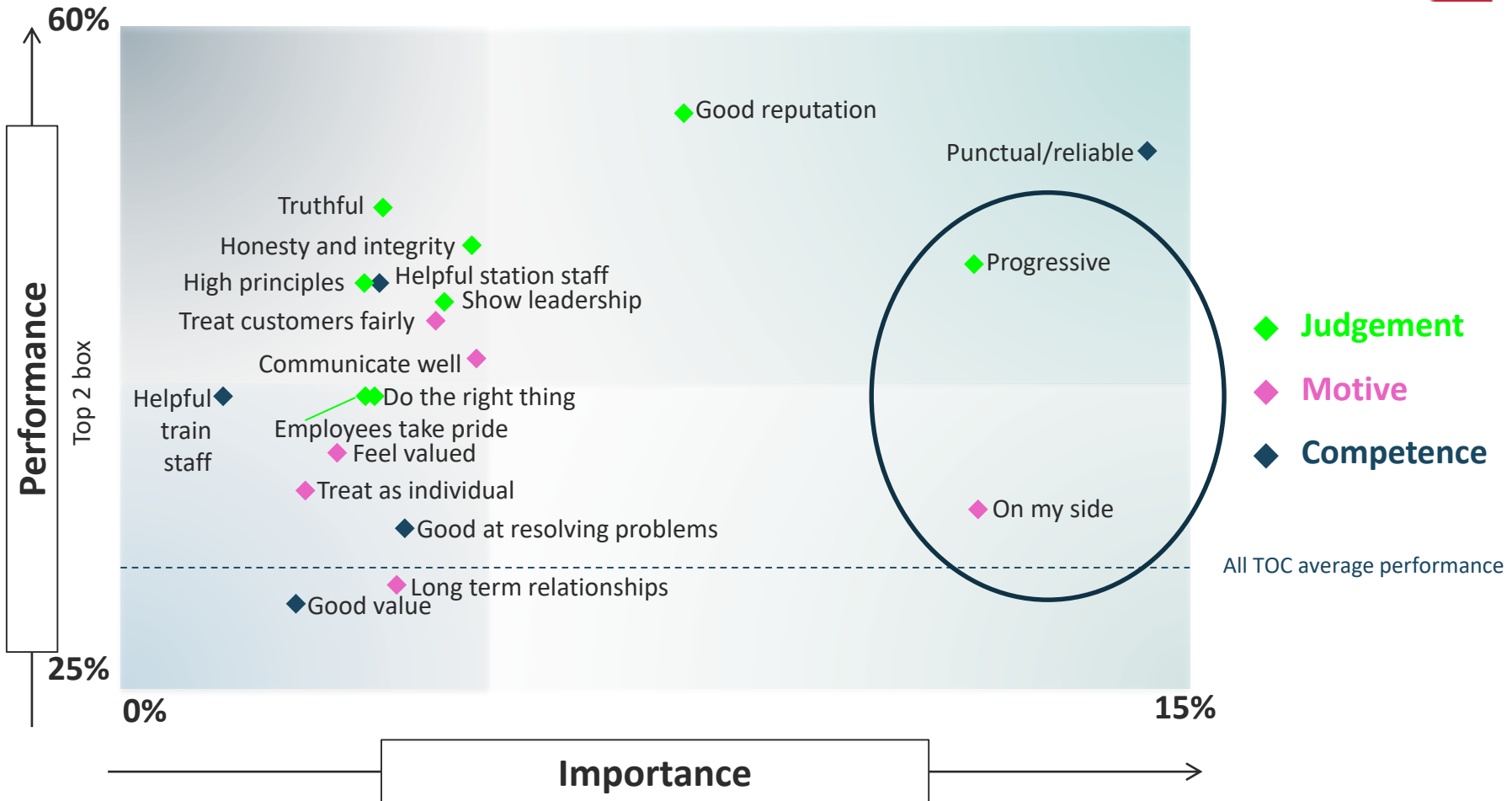
Trust score (top 2 box): 63%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 389)

Chiltern Railways: Good trust score driven by strong performance on punctuality/reliability and being progressive. Trust could be further improved by displaying greater empathy with customers and demonstrating that Chiltern is on their side

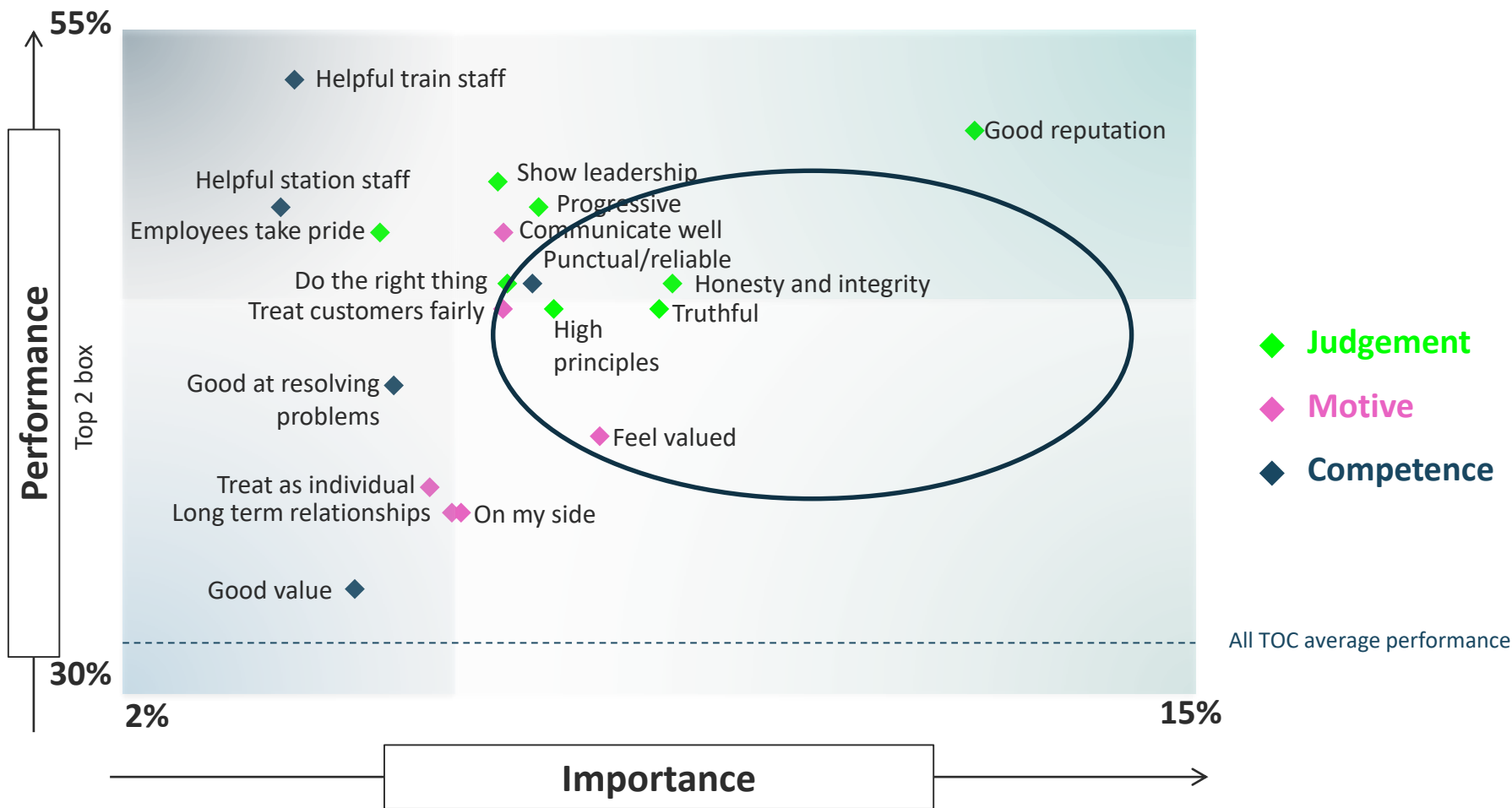
Trust score (top 2 box): 62%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 564)

Virgin Trains East Coast: Good levels of trust, driven more by reputation than performance metrics. Reputation clearly needs to be protected, and a focus on areas such as honesty, integrity, leadership and principles will all contribute to this

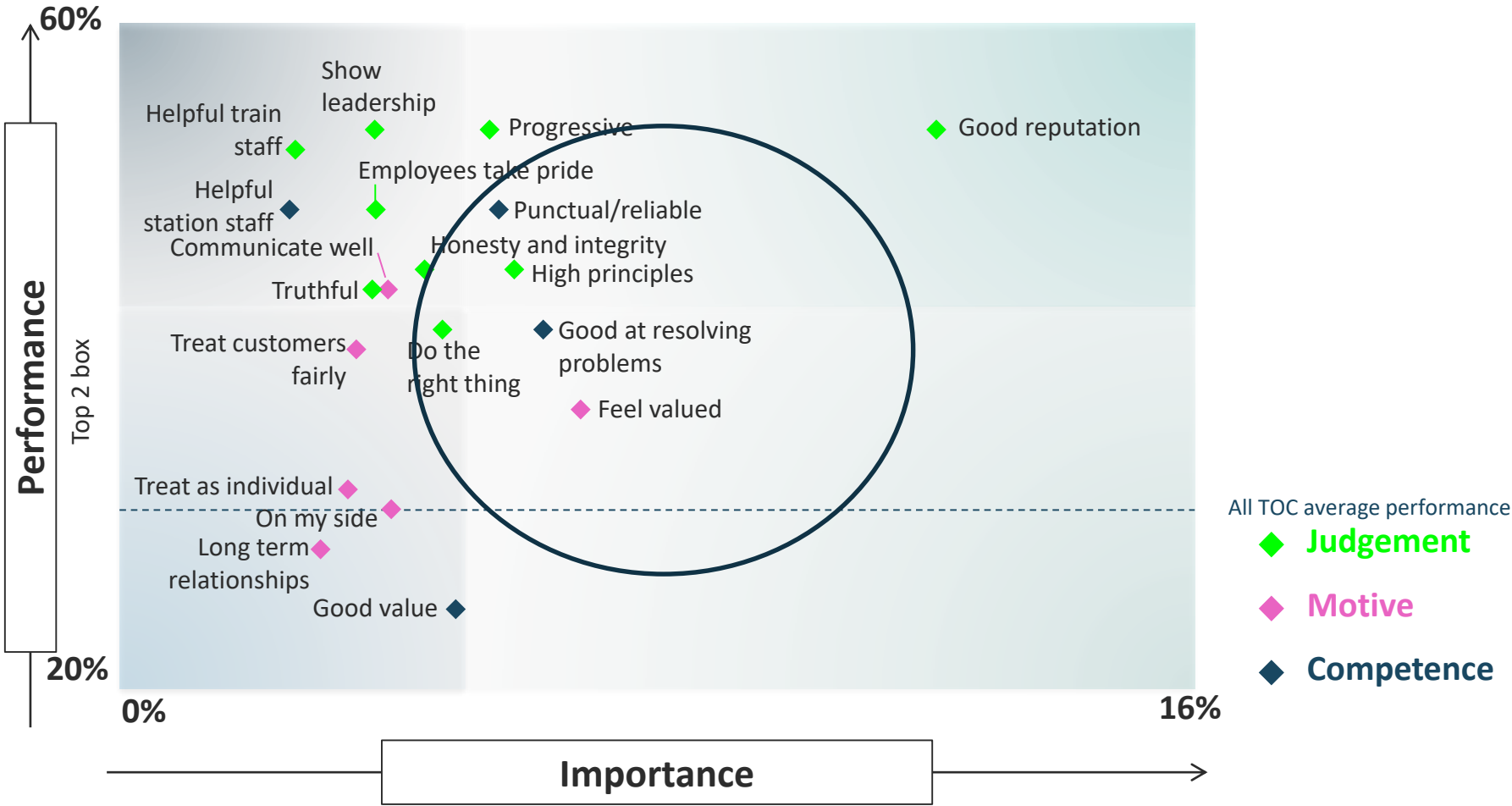
Trust score (top 2 box): 62%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 885)

Virgin Trains (West Coast): Good trust performance, mainly driven by a strong reputation. Reputation could be eroded by lower performance on problem resolution and making customers feel valued, both of which are important drivers of trust

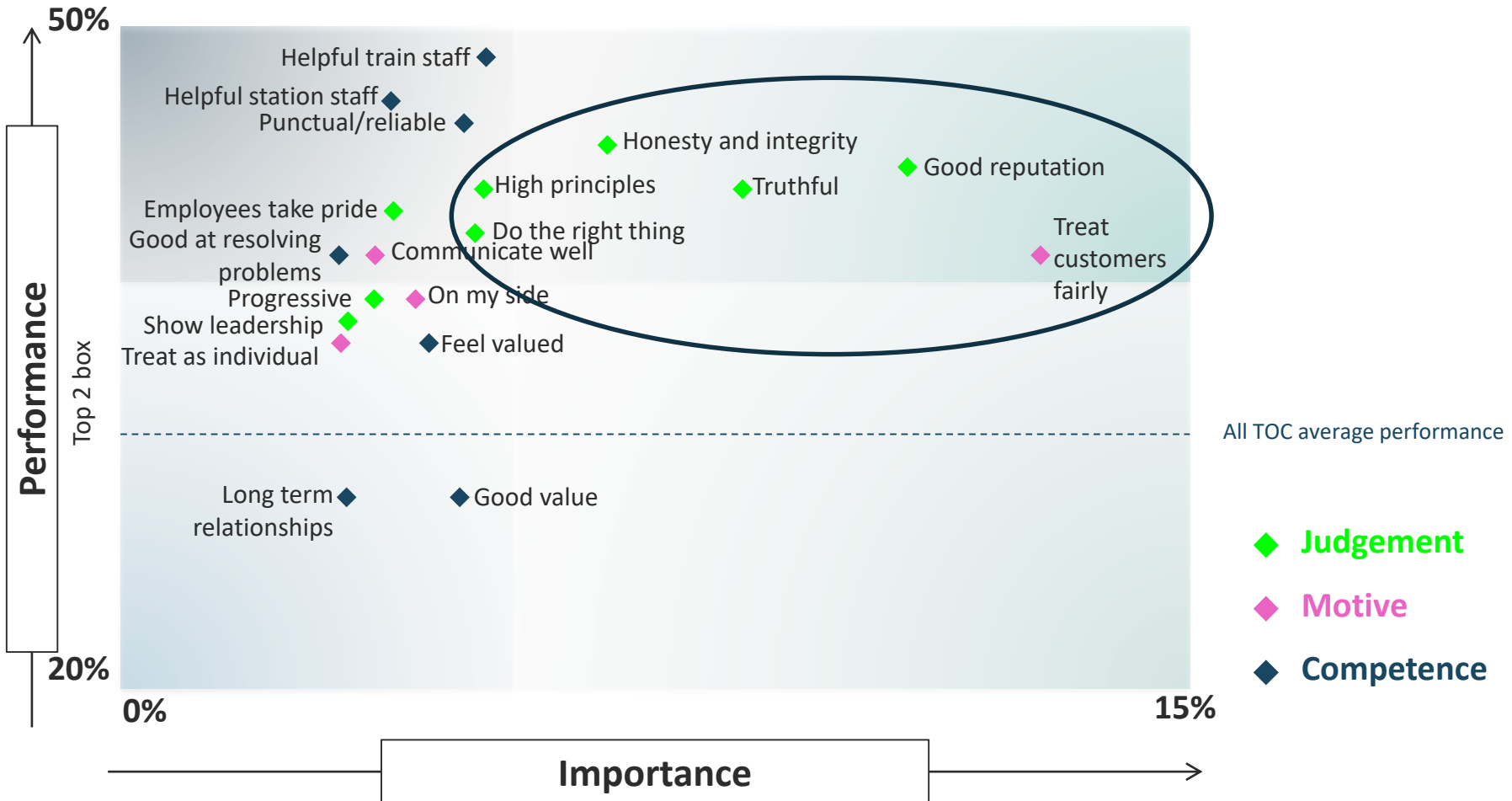
Trust score (top 2 box): 60%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 842)

East Midlands Trains: While performance on the most important trust drivers is generally good, treating customers fairly is the most important driver and performance on this is only mid field. A focus on this should also drive up perceptions of honesty/integrity, reputation and truthfulness

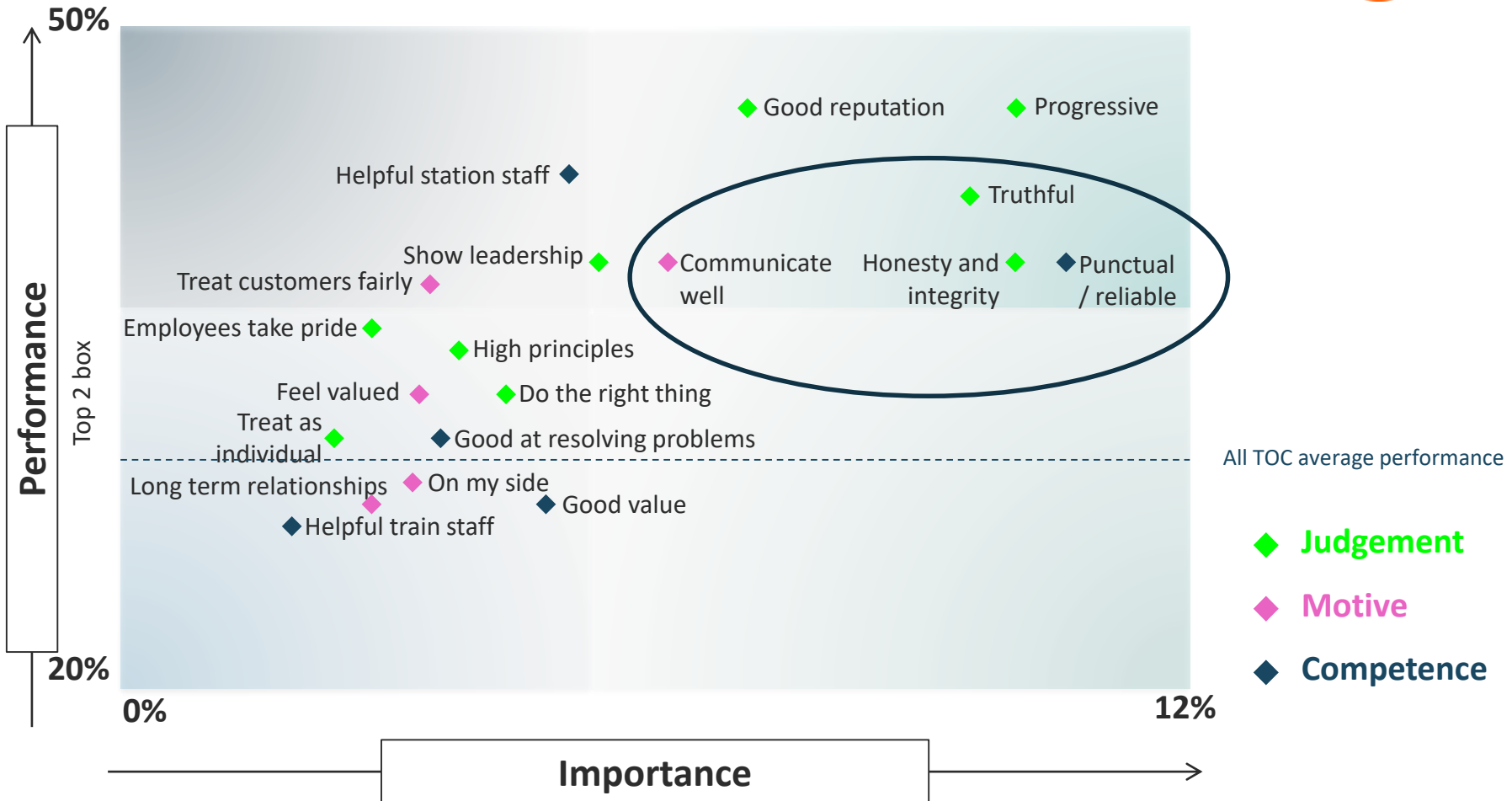
Trust score (top 2 box): 59%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 622)

London Overground: A number of factors are driving relatively strong trust. Retaining and growing trust will depend on improving punctuality/reliability as well as perceptions of honesty, integrity and truthfulness. Linked to this is the need to improve communication with passengers

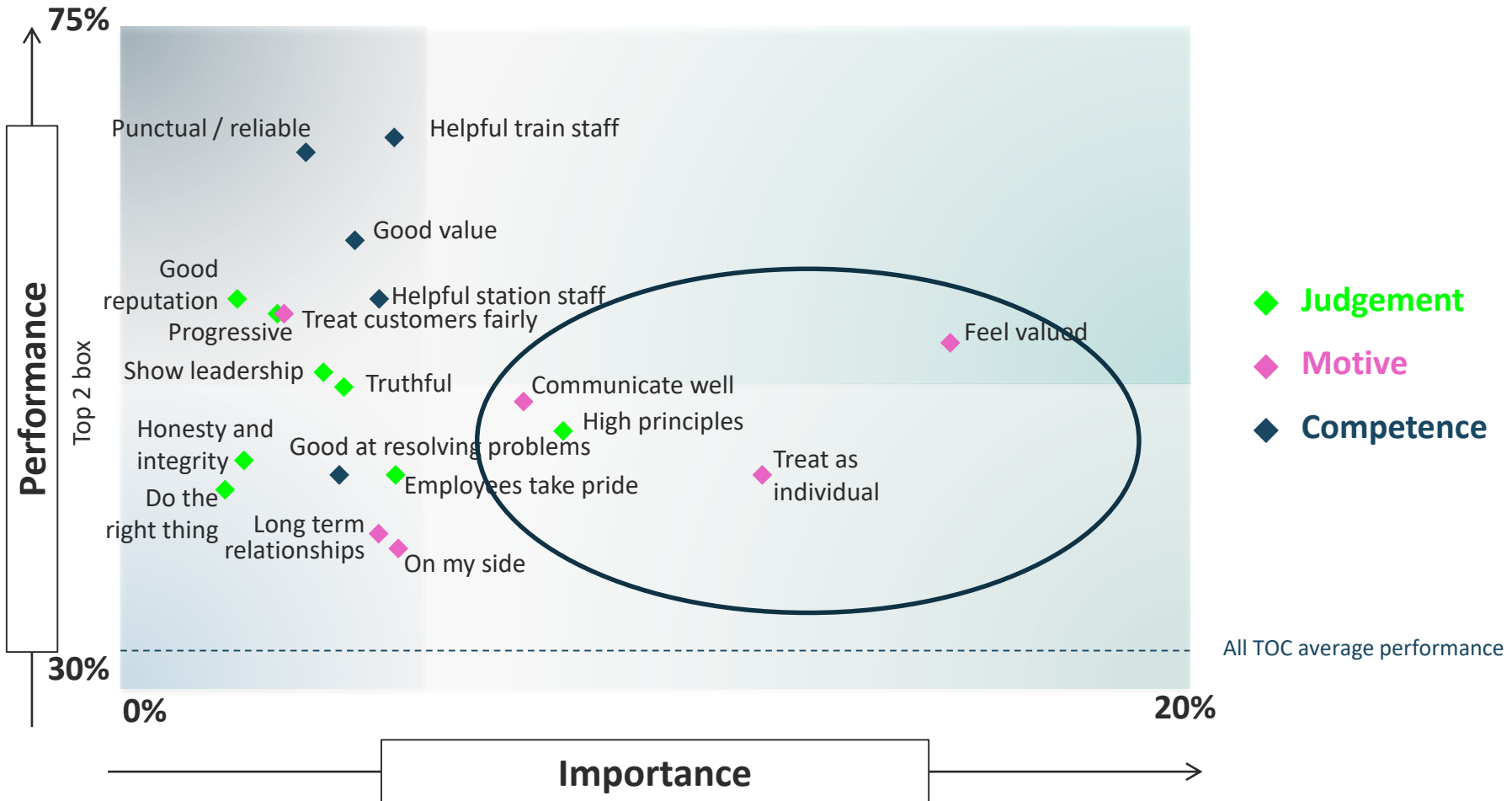
Trust score (top 2 box): 59%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 587)

Grand Central: Making customers feel valued is the strongest driver of trust, although this, as well as other important motive factors, is not one of Grand Central's strengths. Focusing on customers and their individual needs should help improve trust overall

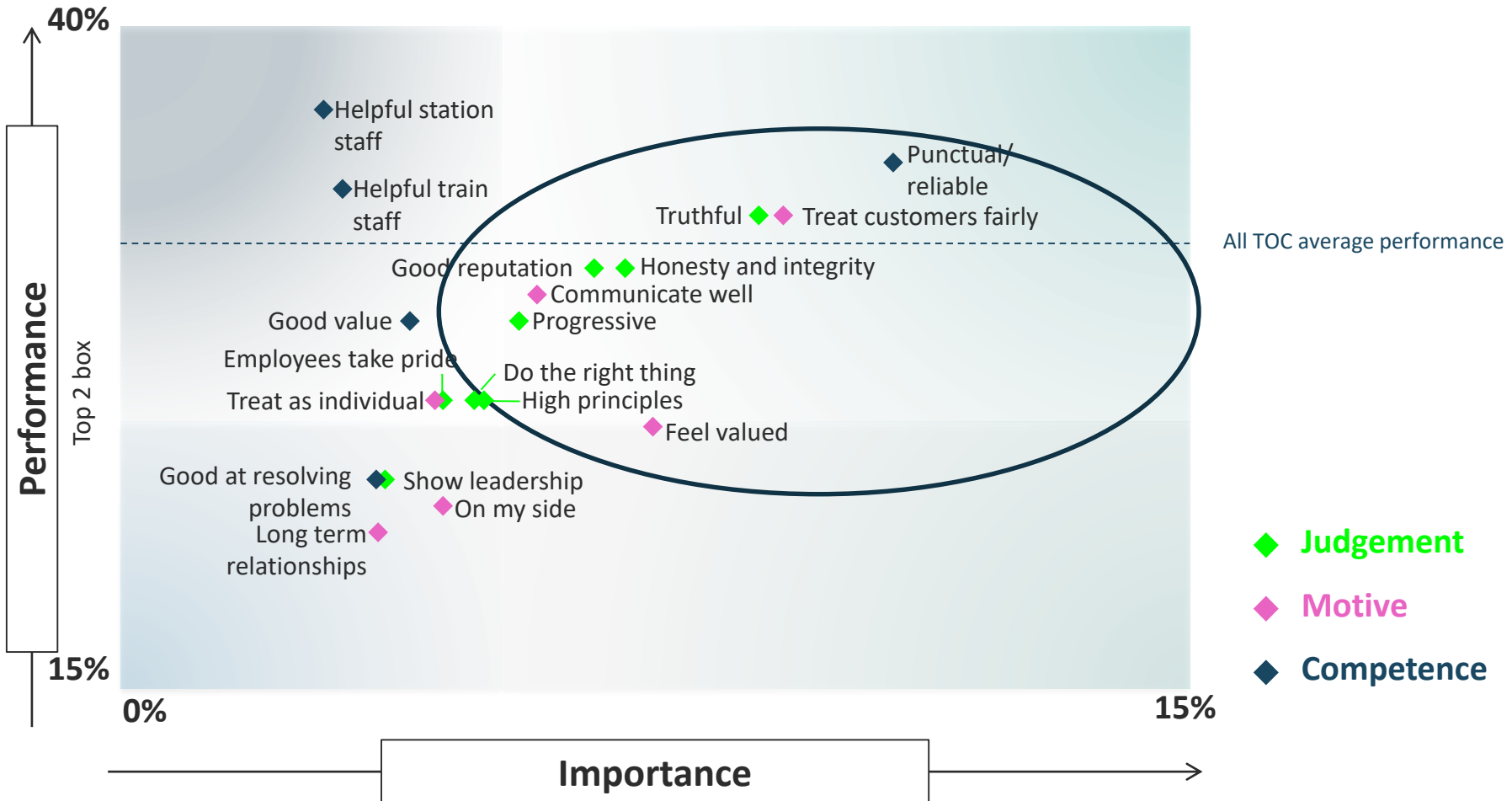
Trust score (top 2 box): 56%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 587)

London Midland: Whilst performance on punctuality/reliability is relatively good, it is the most important driver and improved performance would help increase trust. Treating customers fairly is also likely to improve perceptions of honesty/integrity and truthfulness

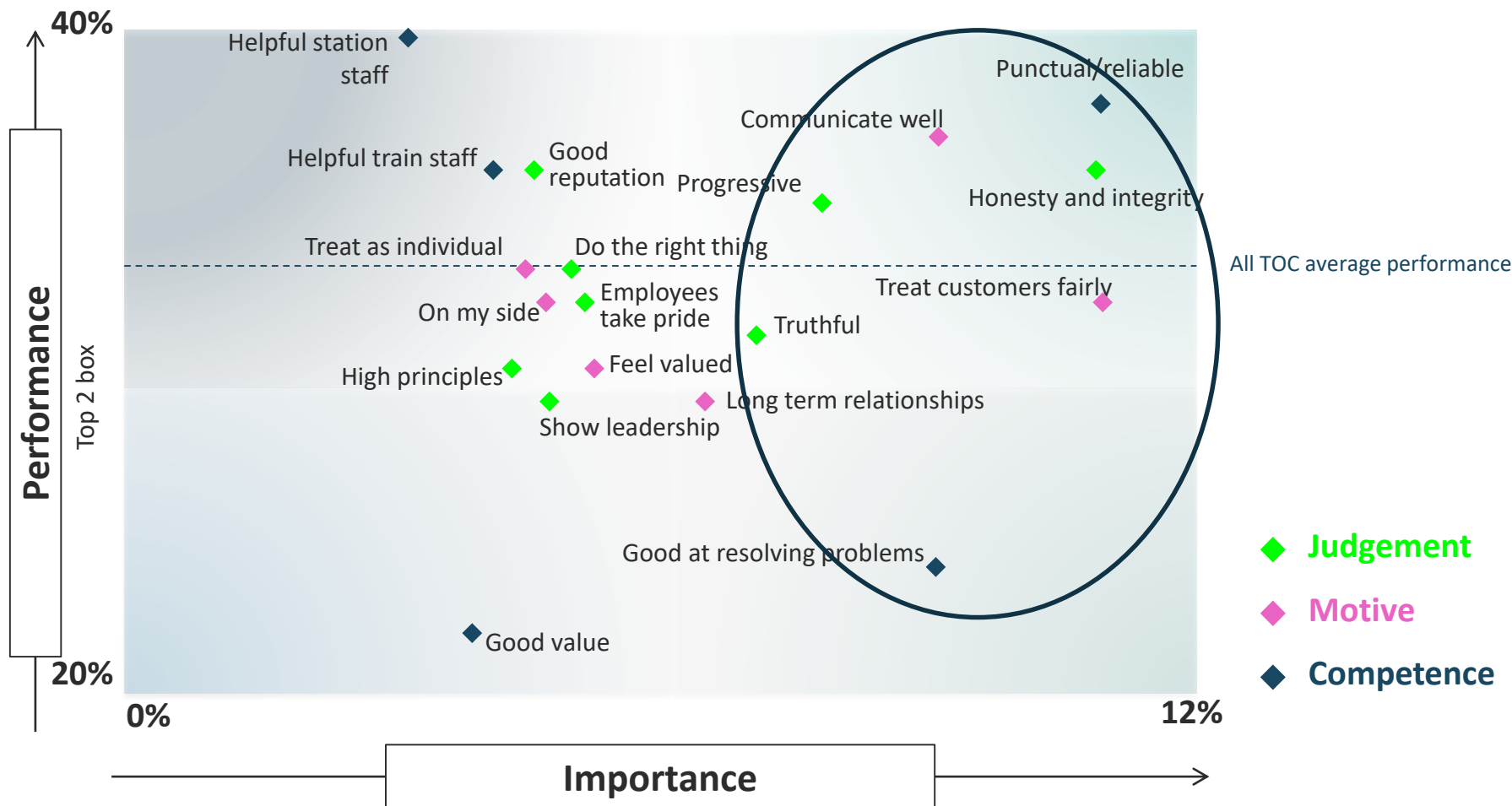
Trust score (top 2 box): 52%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 643)

Gatwick Express: Continuing a strong performance on punctuality/reliability as well as honest communications are all important. In order to increase trust, the focus should be on problem resolution, and ensuring customers feel they have been fairly treated

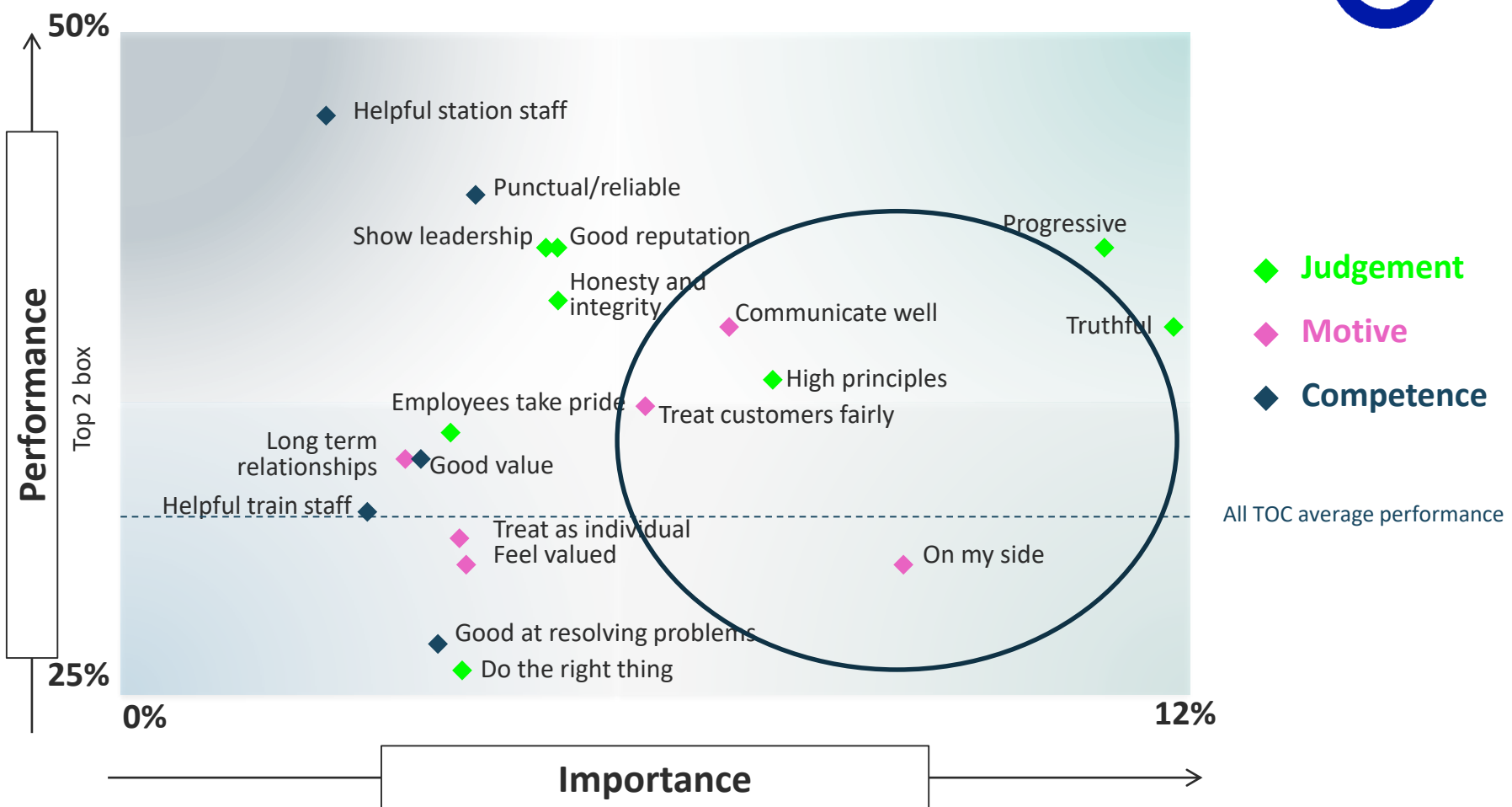
Trust score (top 2 box): 51%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 643)

TfL Rail: Trust in TfL Rail is currently driven by being seen as truthful and progressive. In order to improve the mid table performance on trust, more emphasis should be given to ensuring customers feel the company is on their side, which should be at the heart of TfL's ambition to care about customers

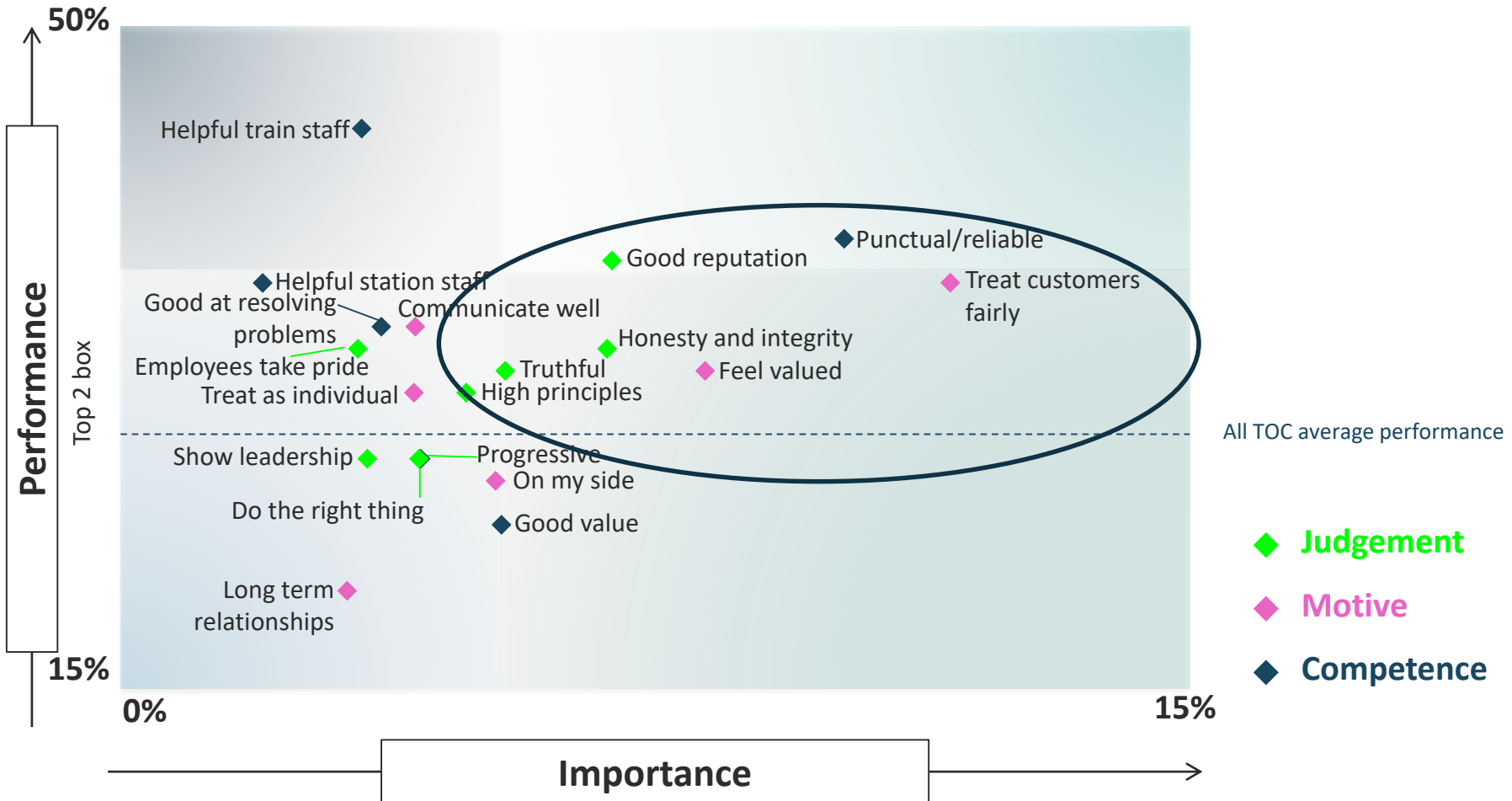
Trust score (top 2 box): 50%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 643)

CrossCountry Trains: A mediocre performance on the key drivers with an opportunity to increase trust by focusing on punctuality/reliability, fair treatment of customers, making customers feel valued and honesty/integrity. Improvement on these should also help the overall reputation

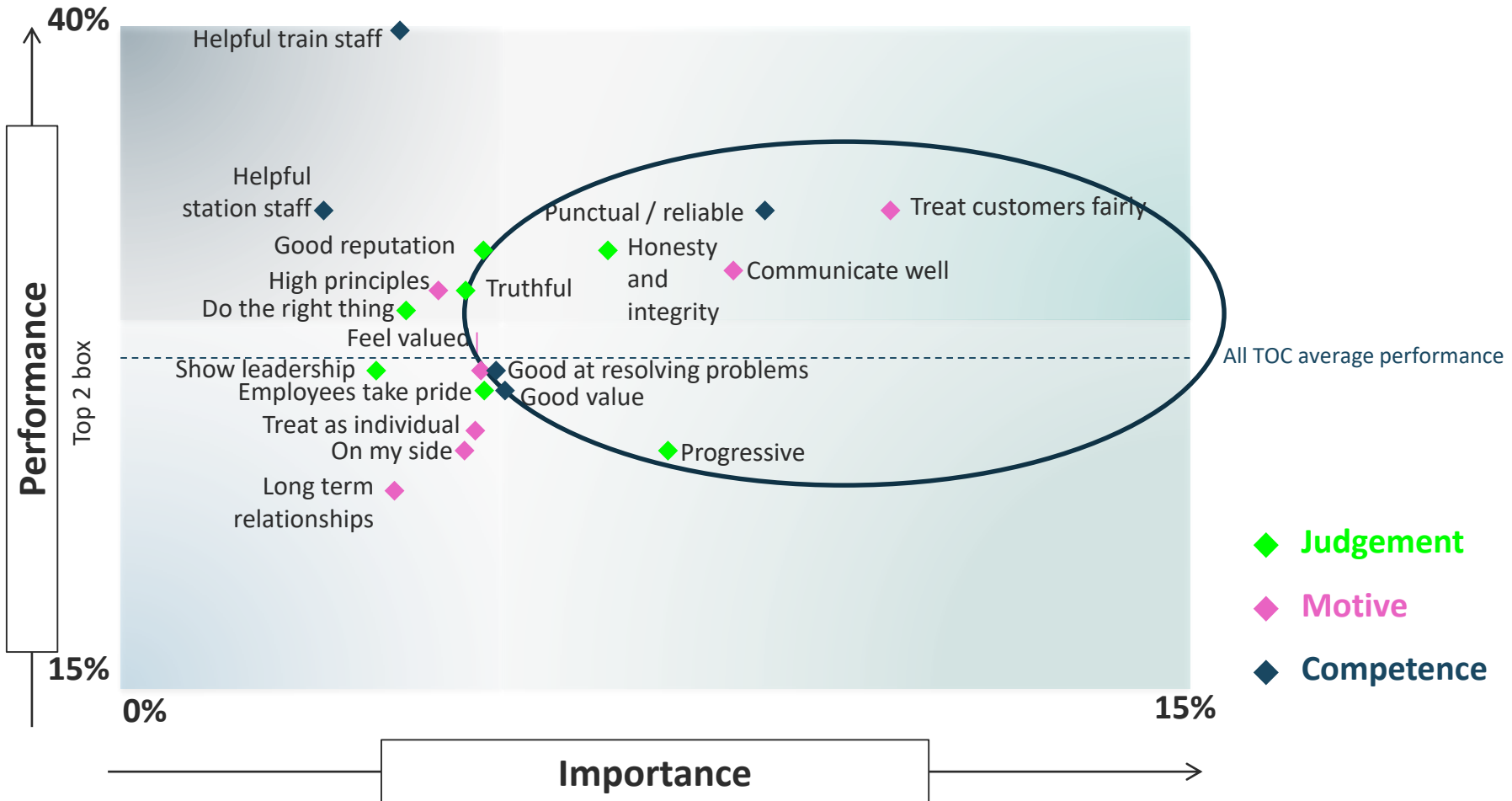
Trust score (top 2 box): 50%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 605)

Transpennine Express: There is no single important driver performing exceptionally well, with a focus needed on punctuality/reliability, treating customers fairly, communication and honesty/integrity. Being seen to be progressive is the key driver that could most benefit from improvement

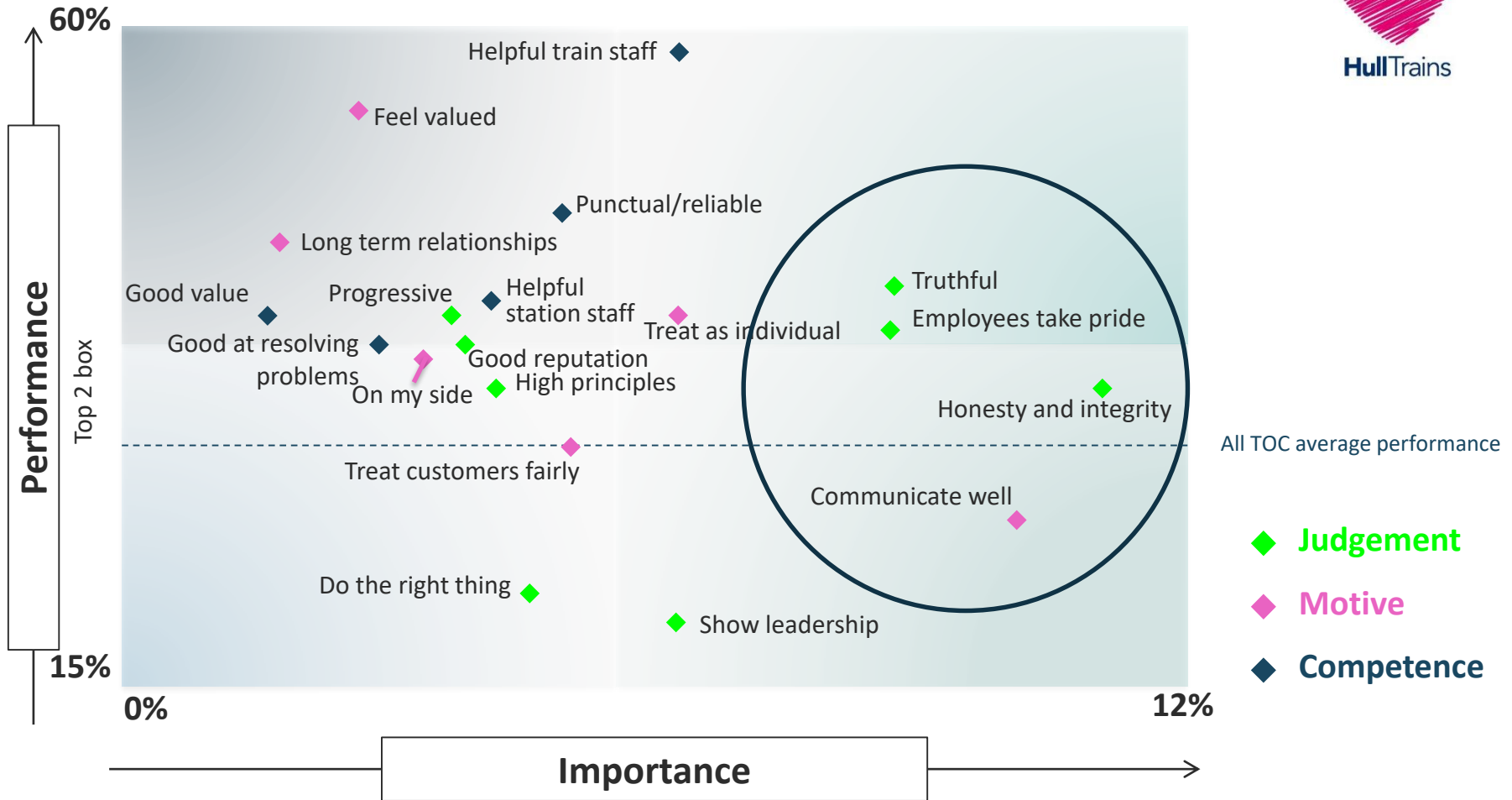
Trust score (top 2 box): 50%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 590)

Hull Trains: Hull Trains' strengths are having helpful train staff and making customers feel valued, but these are not as important in driving trust as attributes relating to honesty, being truthful and having proud employees. These attributes must improve to increase trust, along with better customer communications

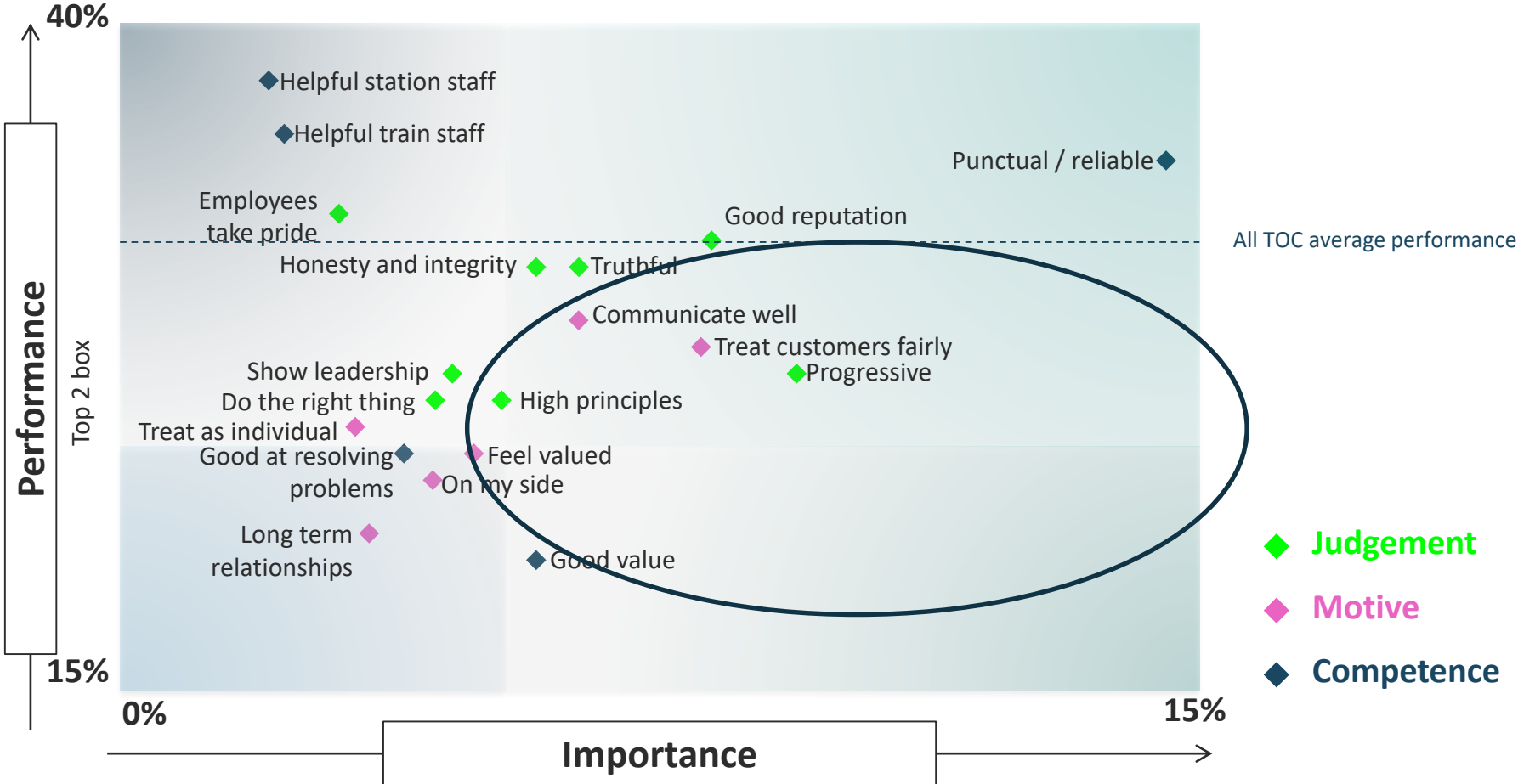
Trust score (top 2 box): 50%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 590)

South West Trains: A mid-range trust score that relies heavily on punctuality/reliability, meaning that any decline in performance will impact on trust. A focus on treating customers fairly, communicating well, being truthful and being progressive will help to retain or grow levels of trust

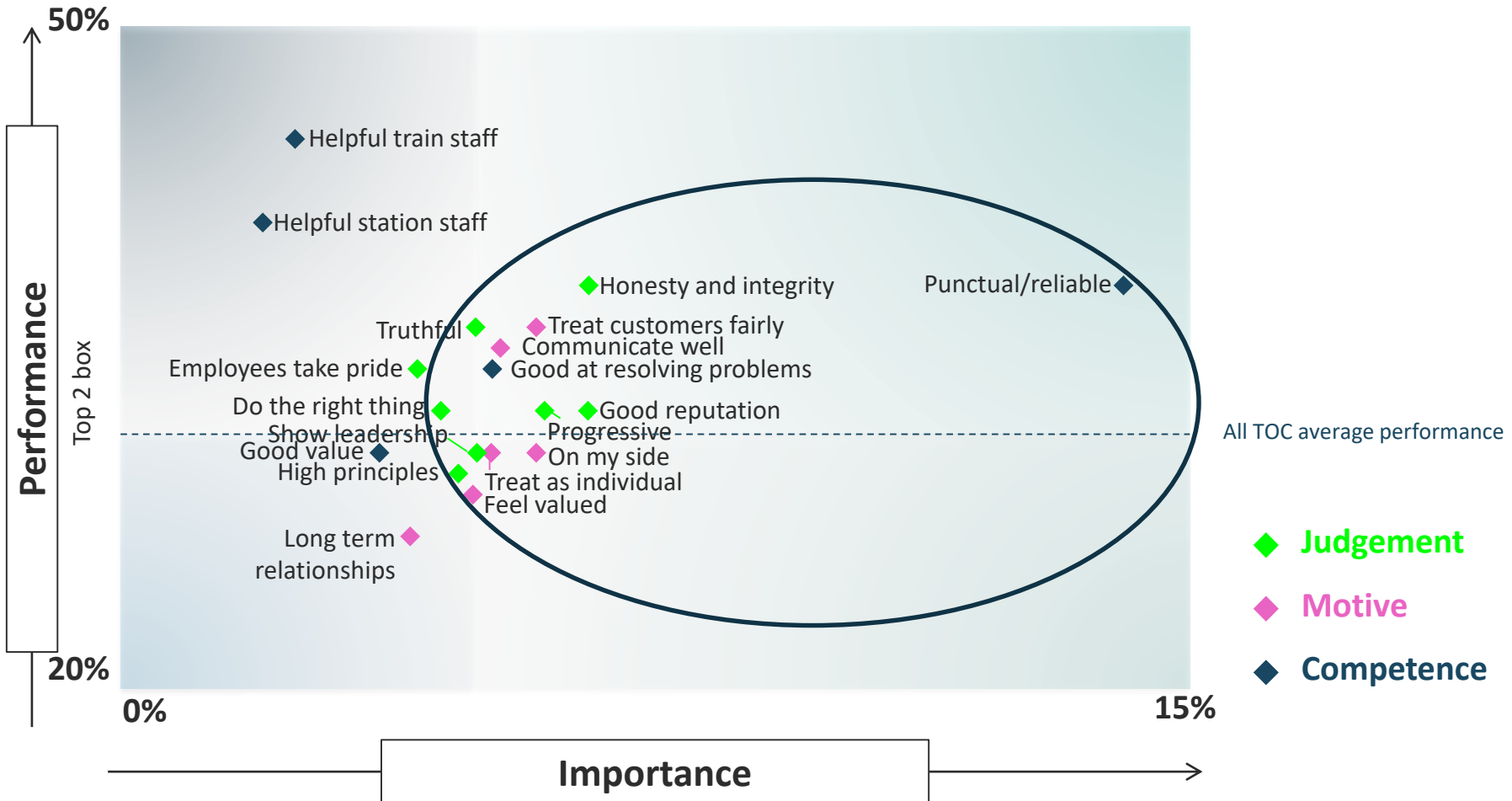
Trust score (top 2 box): 49%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 638)

Northern: Maintaining and improving punctuality/reliability, the key driver of trust, is important for overall trust levels. In addition, focusing on motive attributes will contribute to improving trust – making passengers feel valued by demonstrating being on their side and treating them as individuals

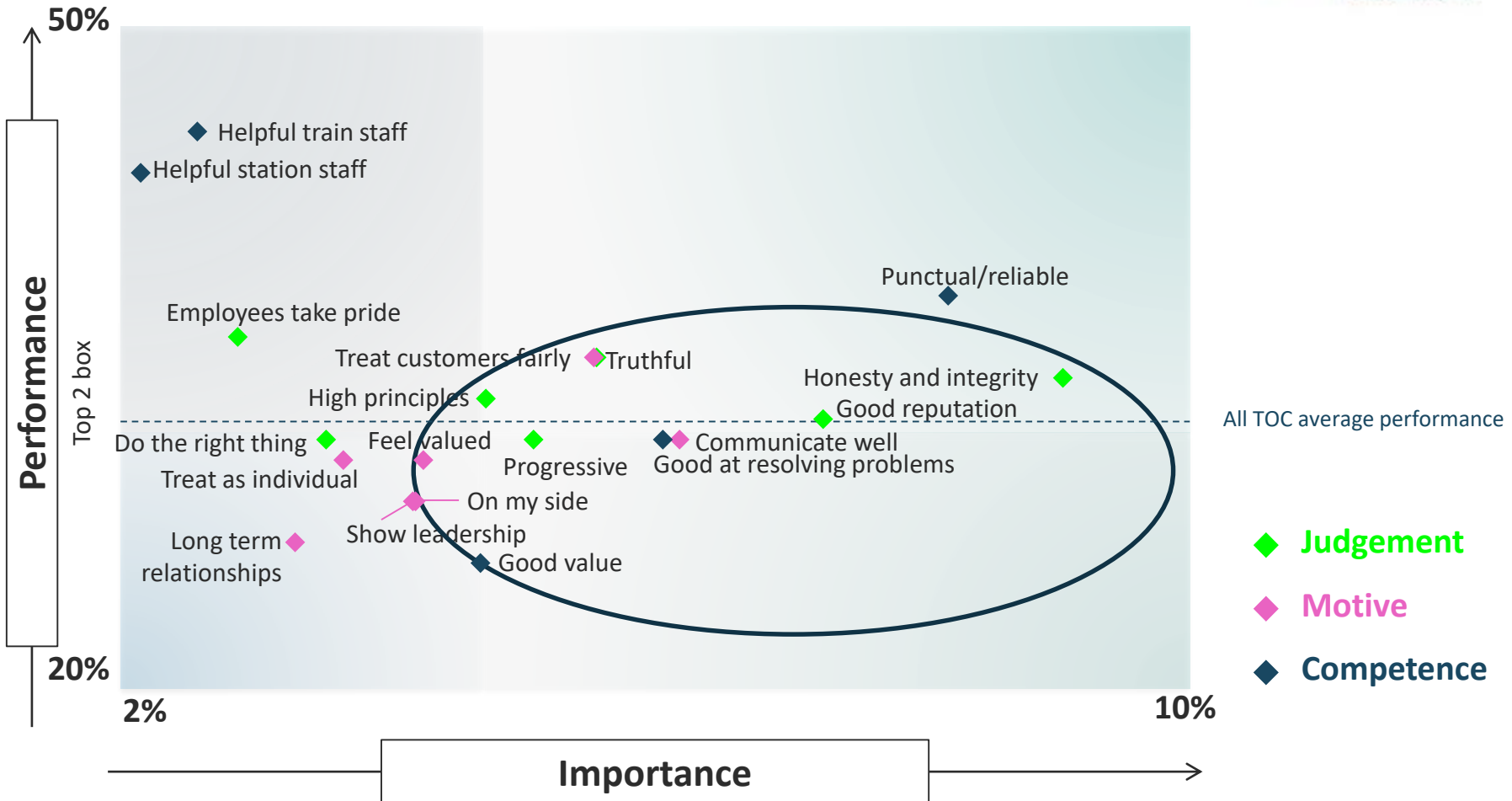
Trust score (top 2 box): 48%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 653)

Arriva Trains Wales: There are a number of factors driving trust, with mediocre performance on several of these. Priorities for improvement include honesty/integrity, reputation, better communication and problem resolution. Performance on punctuality/reliability should also be maintained (or improved)

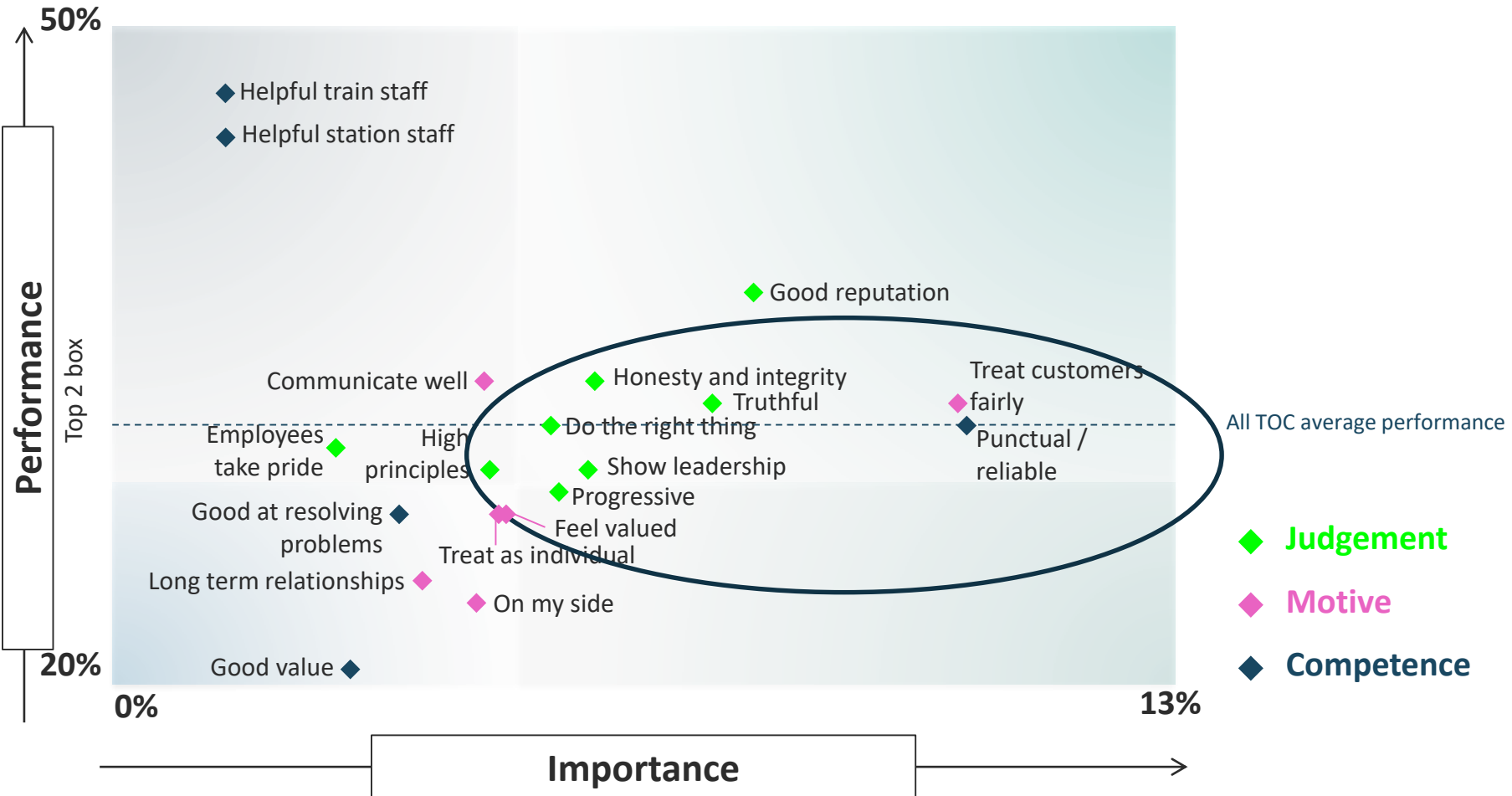
Trust score (top 2 box): 48%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 1,018)

Great Western Railway: Trust is primarily driven by punctuality/reliability and fair customer treatment. Performance on both needs to be improved to increase overall trust levels. Secondary focus should be on judgement – honesty/integrity, truthfulness and demonstrating leadership by doing the right thing

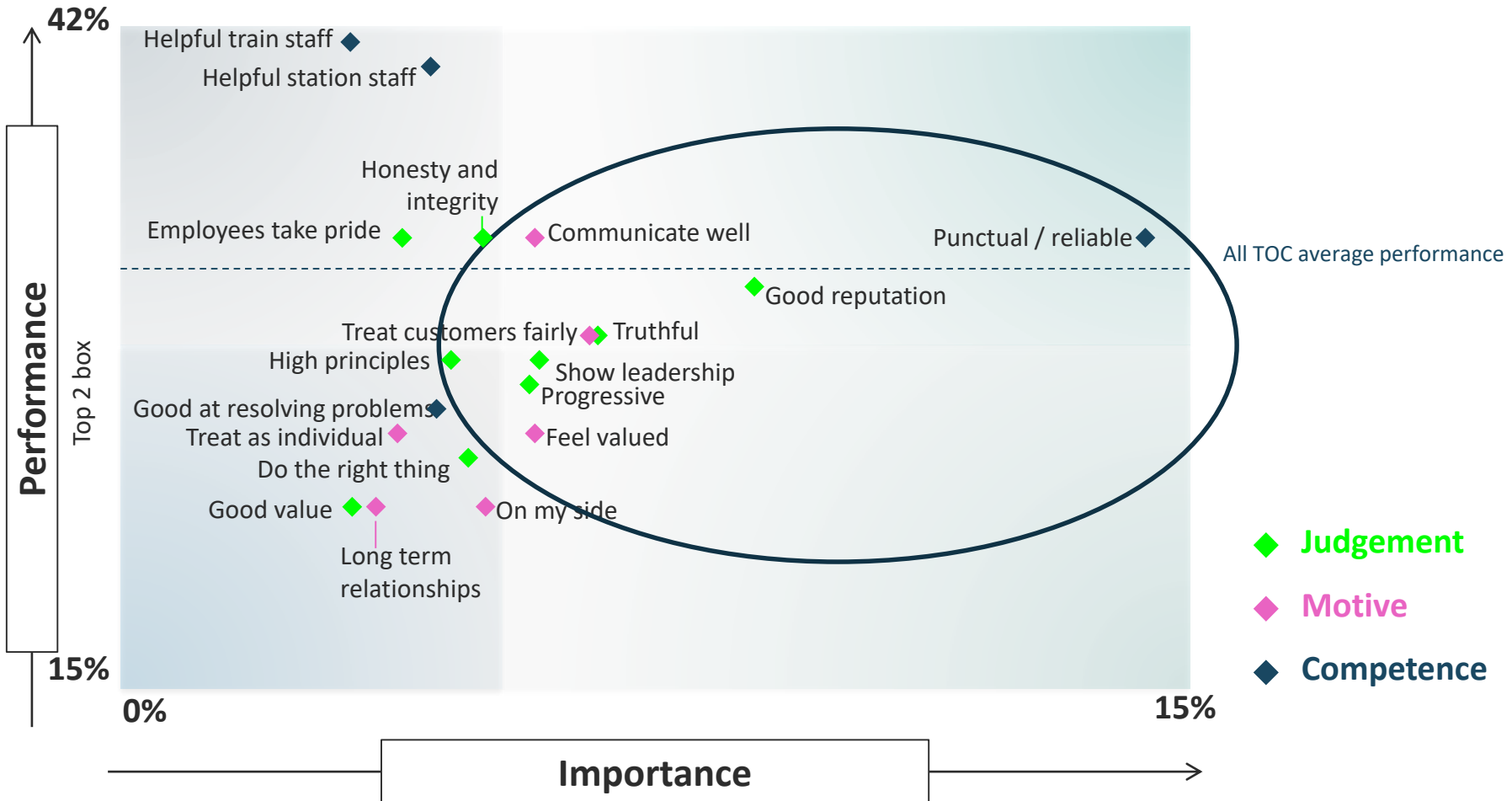
Trust score (top 2 box): 47%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 1,061)

Scotrail: Punctuality/reliability is the most important driver and there is room for improvement to increase trust overall. Other areas for focus including making customers feel valued and that they are treated fairly, as well as demonstrating judgement by being truthful, progressive and showing leadership

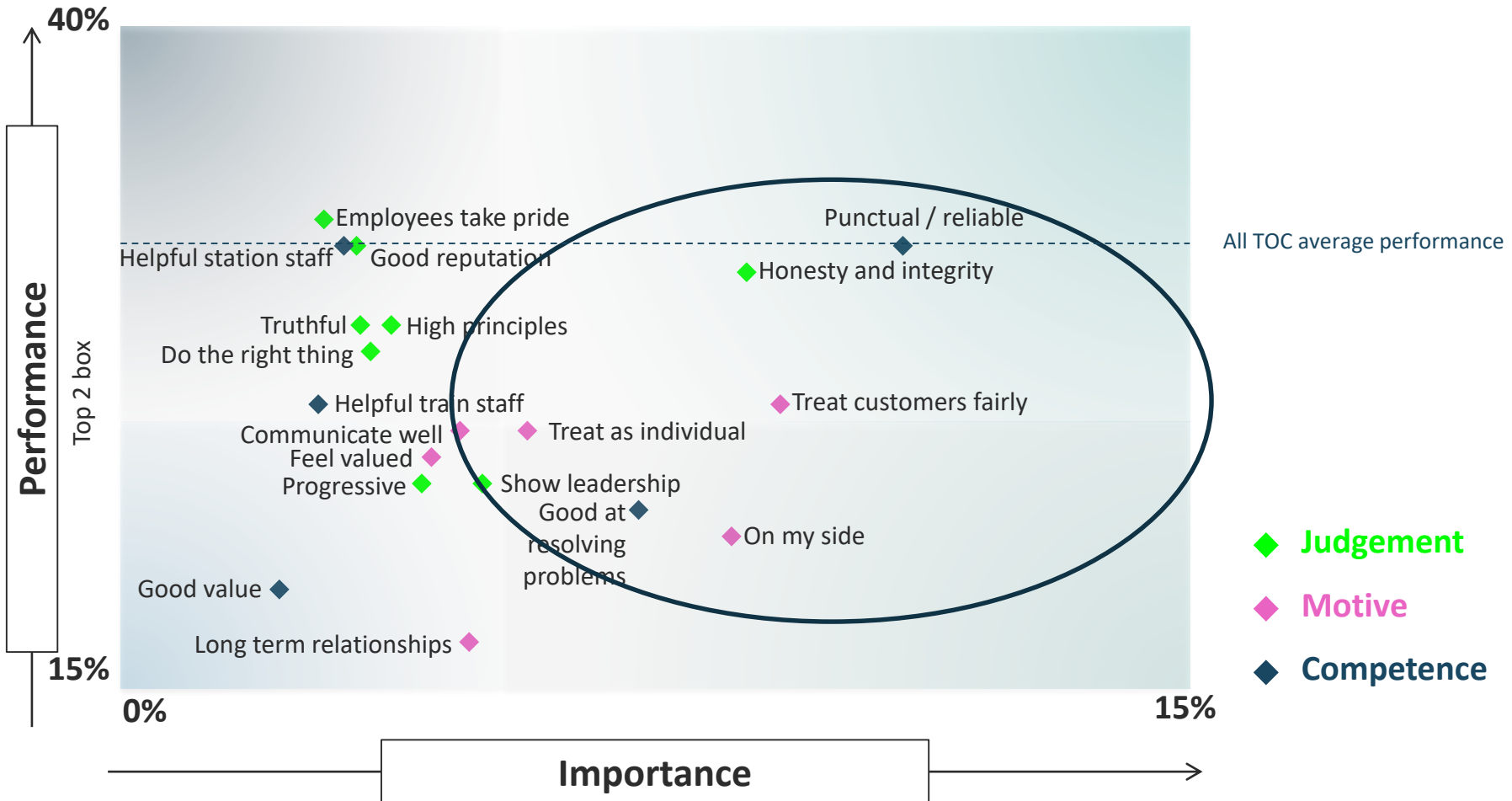
Trust score (top 2 box): 47%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 1,133)

Great Northern: Trust is driven by punctuality/reliability, honesty/integrity, treating customers fairly and being on customers' side. Performance on these is weak in comparison with other TOCs, and all of these need focus and improvement in order to increase a below average level of trust

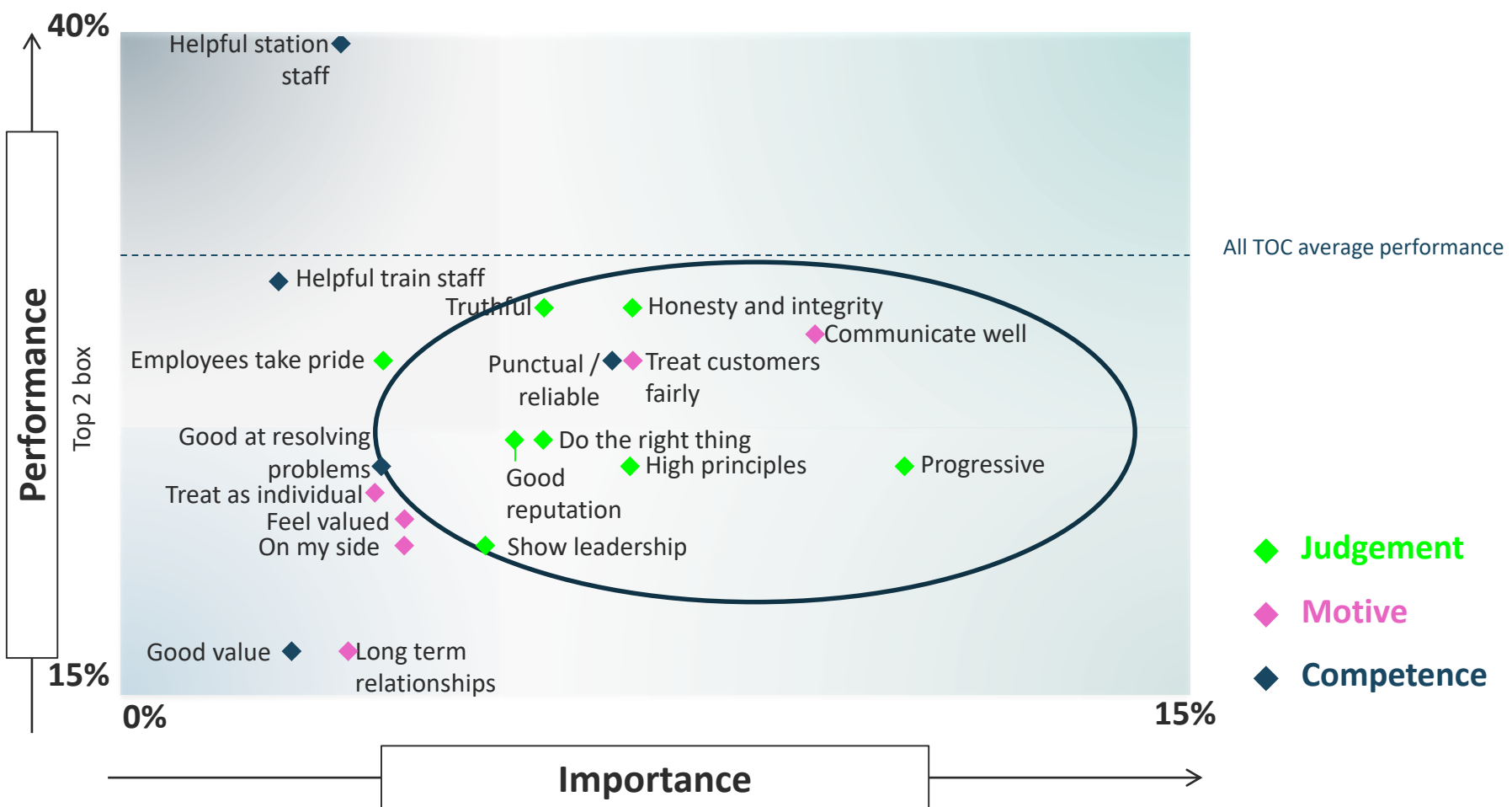
Trust score (top 2 box): 42%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 388)

Greater Anglia: Relatively low trust is driven by a combination of factors, mainly focused on judgement and motive attributes. Focus should be on improving perceptions of being progressive, communicating well, demonstrating honesty/integrity, fair customer treatment and strong leadership

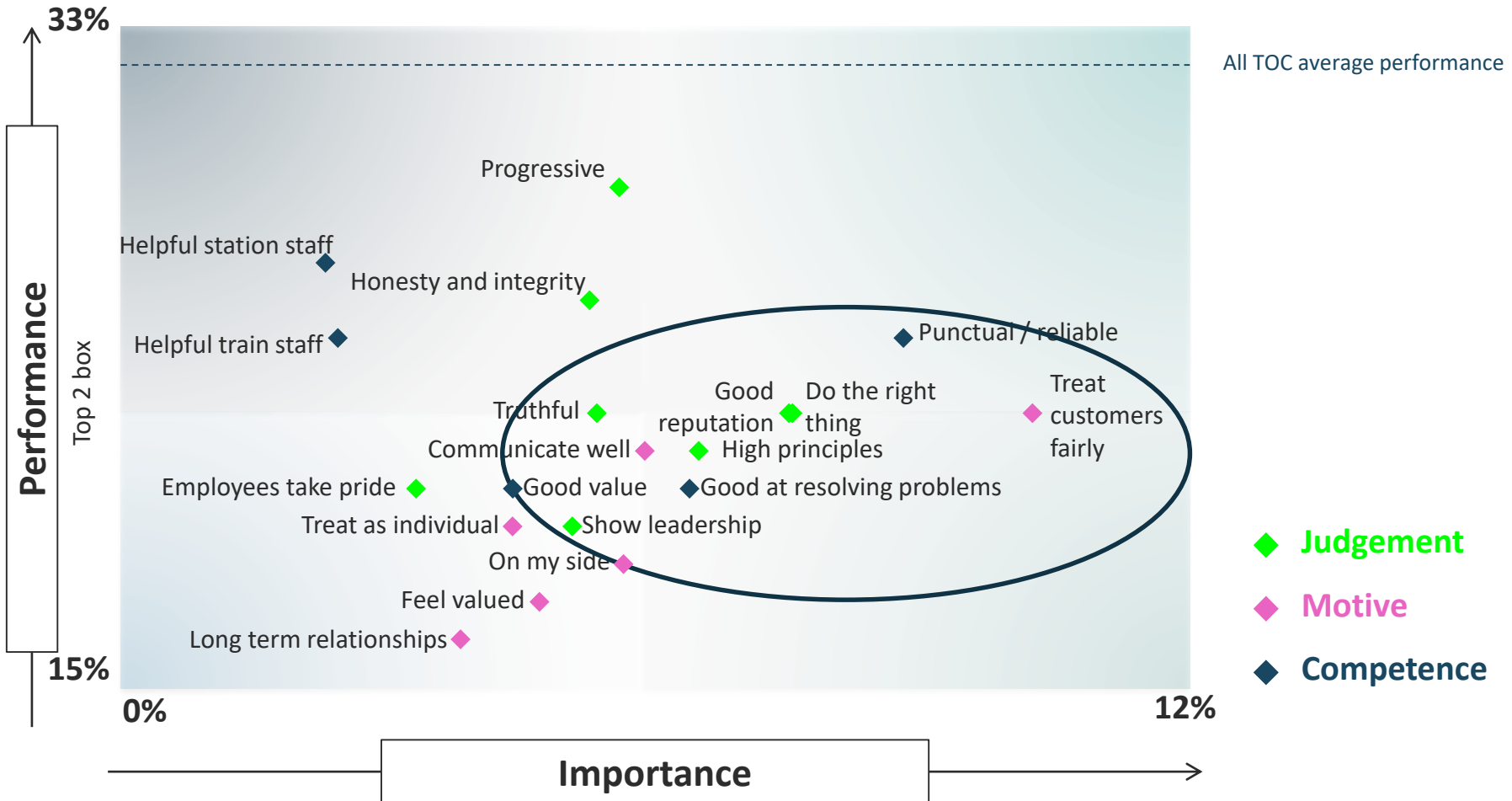
Trust score (top 2 box): 41%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 596)

Thameslink: One of the lowest trust scores, with fair customer treatment and punctuality/reliability the most important factors in driving trust. It is essential to focus on these and also improve problem resolution. Prioritising these should also help perceptions of doing the right thing and overall reputation

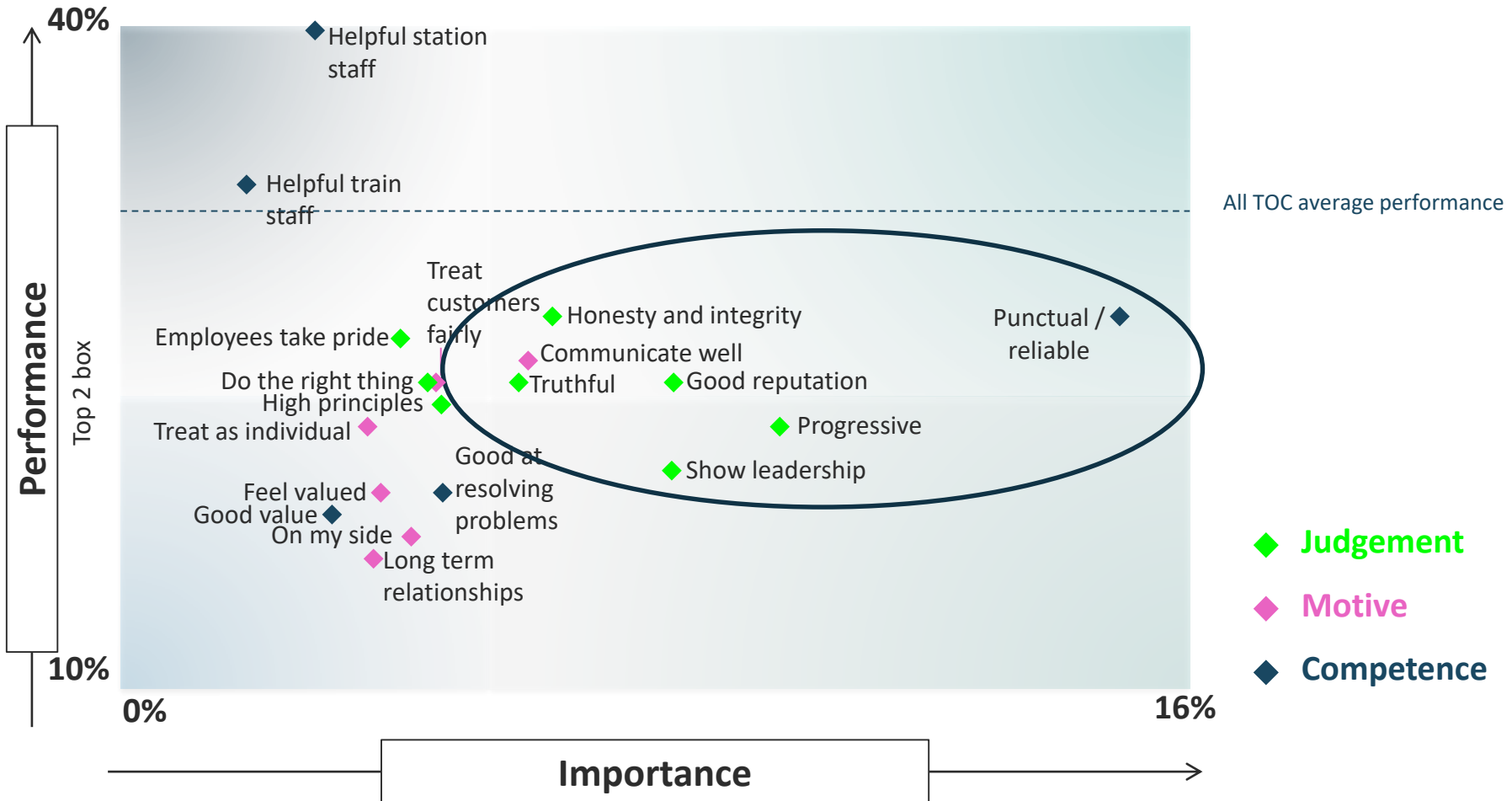
Trust score (top 2 box): 32%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 584)

Southeastern: A poor trust score, with relatively weak performance on punctuality/reliability, which is the key driver. This needs to be the main priority, but a focus on criteria that demonstrate leadership, being progressive, having a good reputation and honesty/integrity will also improve trust overall

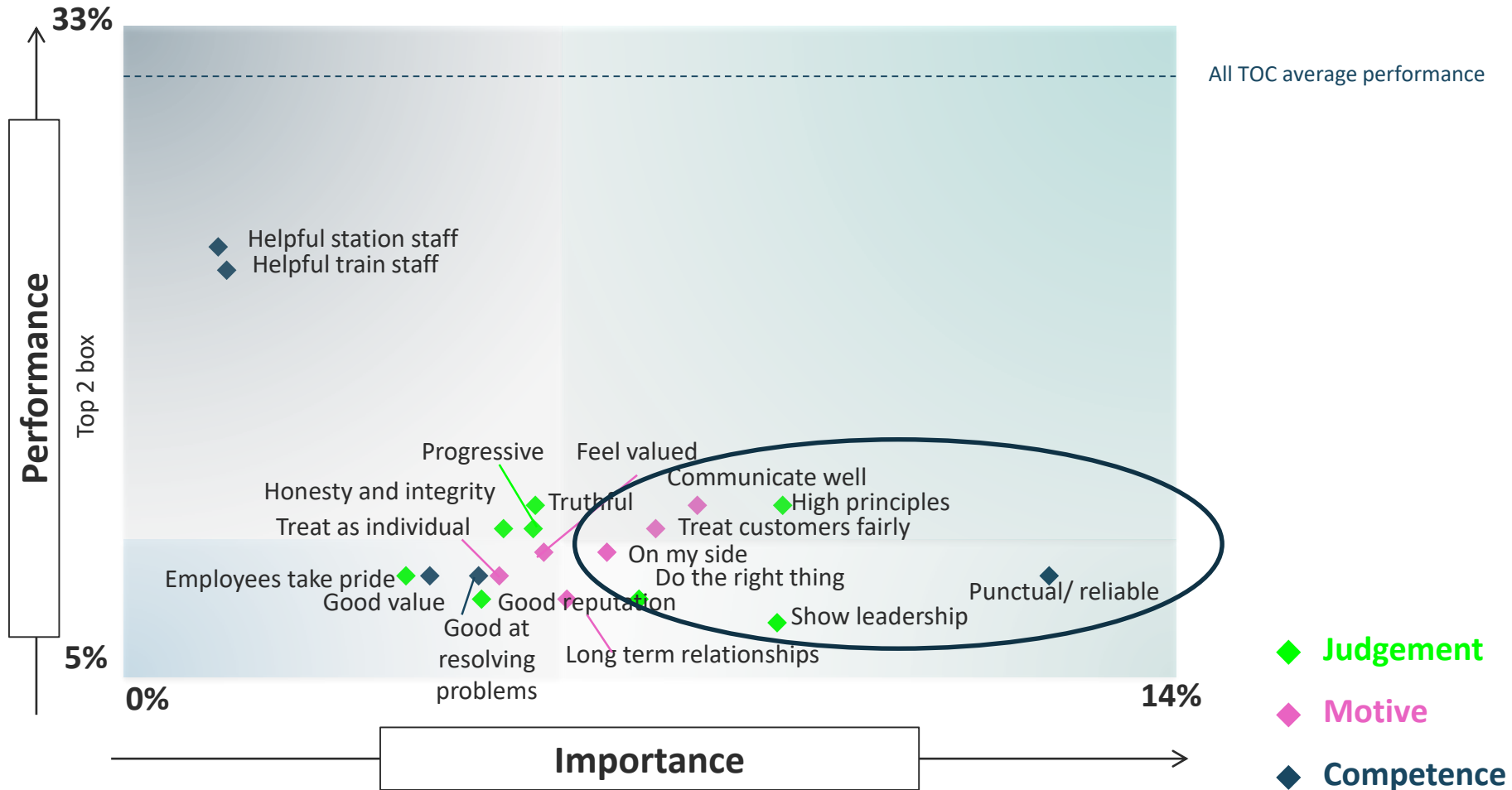
Trust score (top 2 box): 31%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 633)

Southern: The least trusted, with clear priorities for improvement. Firstly, punctuality/reliability needs to be addressed, along with actions that demonstrate leadership and a sense of doing the right thing for passengers. Focusing on these will also help perceptions of fair customer treatment

Trust score (top 2 box): 14%



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'? (Base: 643)

Performance of TOCs within each driver



Summary: Performance of TOCs within each driver

This section outlines the attributes that make up the drivers, ordered by overall performance (rather than by order of importance)

The most important driver of trust is punctuality/reliability, which is the third highest performing attribute. However, this masks the picture underneath. It is the attribute which has greatest variability of scores, ranging from just 10% for Southern up to 69% for Grand Central. No other attribute sees this range or scores (59 percentage points)

High variability is also seen for the attributes that are second and third most important in driving trust:

- Good reputation has a range of 50 percentage points (9% - 59%)
- Treating customers fairly has a range of 53 percentage points (11% to 64%)

The two best performing attributes are helpful staff at stations and helpful staff on trains. However, these are the least important drivers of trust

Each slide also shows the performance of a specific attribute across all TOCs – this is found on the right hand chart of each slide

Grand Central, Heathrow Express and Heathrow Connect tend to receive the highest score for performance for most driver attributes

- The only exception is for building long term relationships with customers, the performance of which is rated highest by passengers of Hull Trains

Grand Central, Merseyrail and c2c receive the highest performance rating for the top driver of trust (punctuality/reliability)

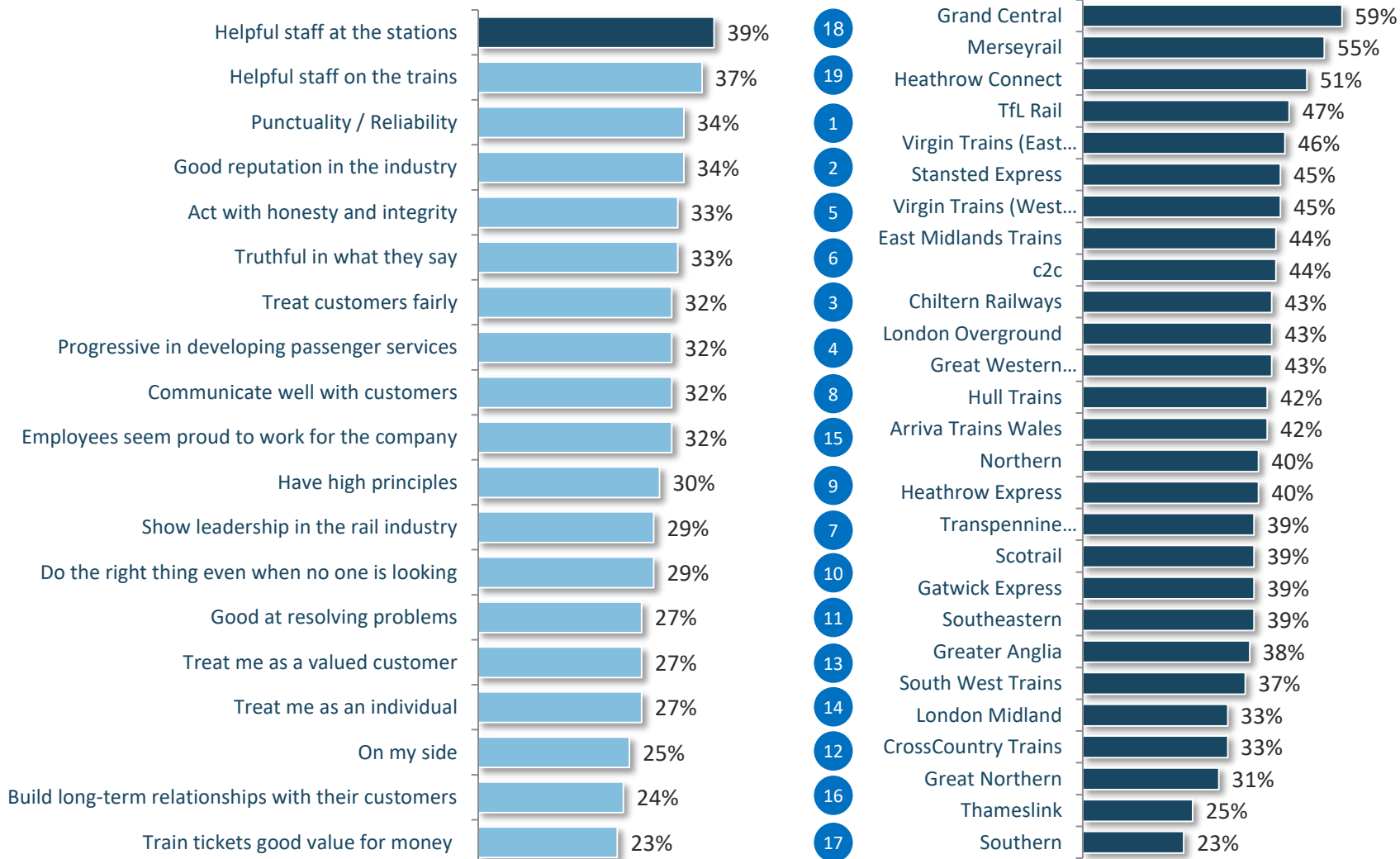
Having helpful staff covers the top two performance areas; having helpful staff at stations is the top performing area



% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

This is followed by having **helpful staff on trains** being the second highest performing

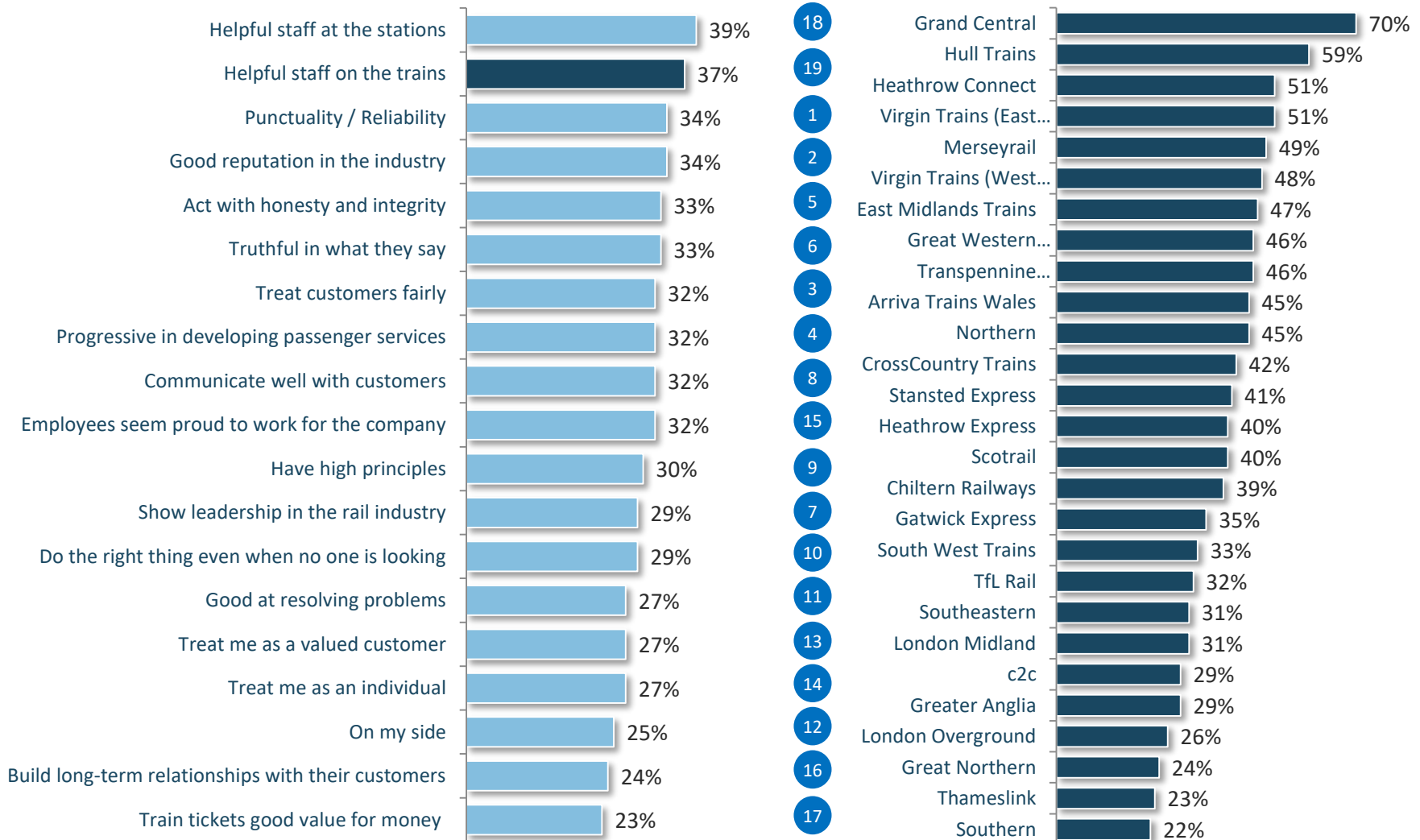


COMPETENCE

% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC

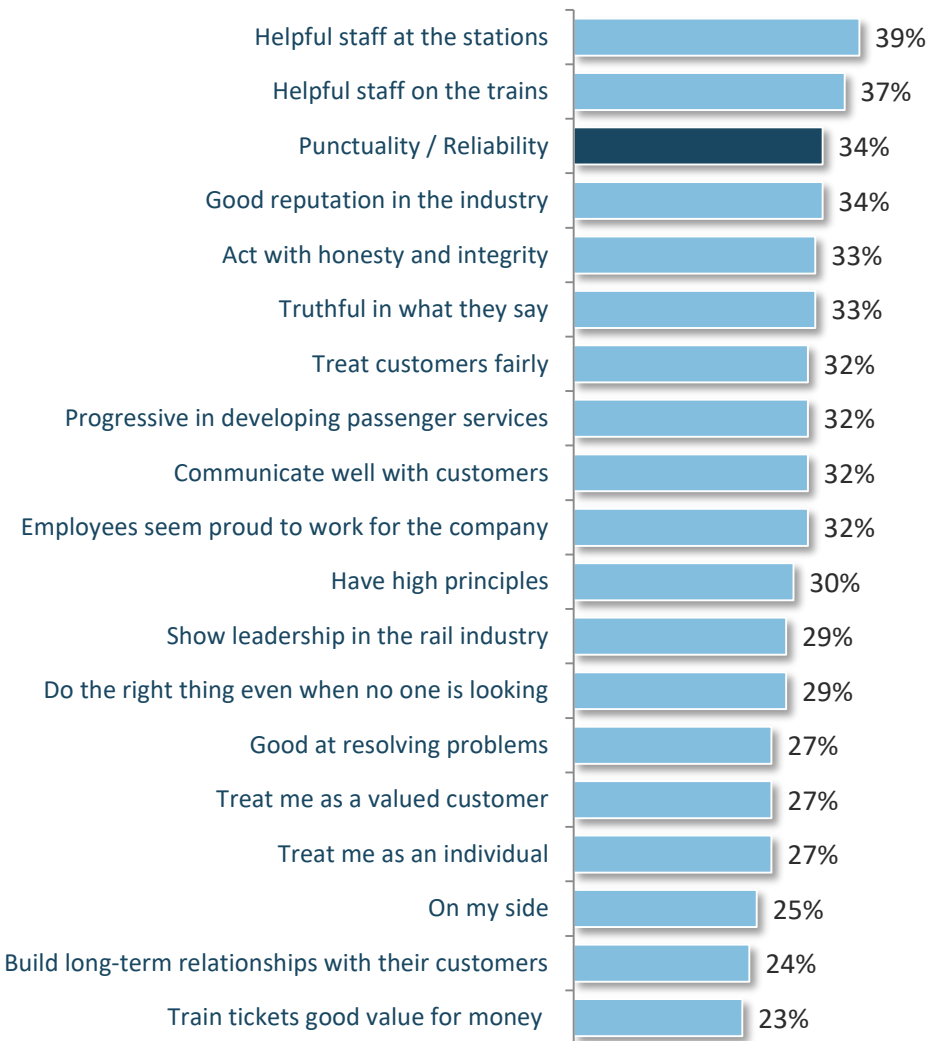


D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Overall **punctuality and reliability** is the third highest performance area, with wide variability in performance across the TOCs



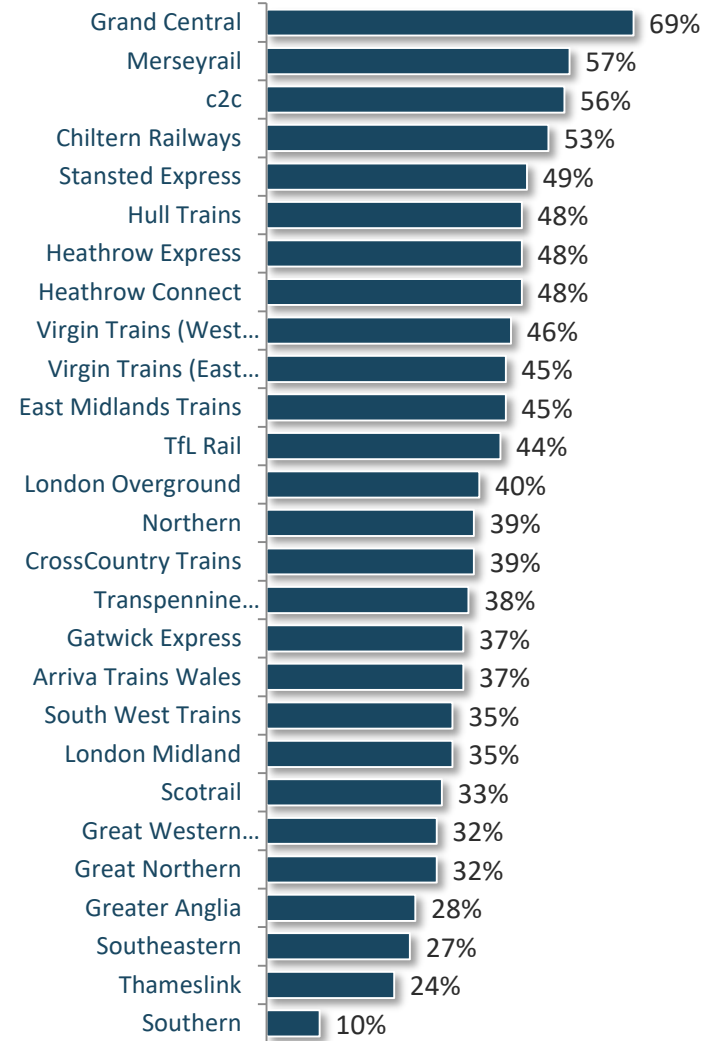
% Agree (top 2 box) – overall



Key driver ranking



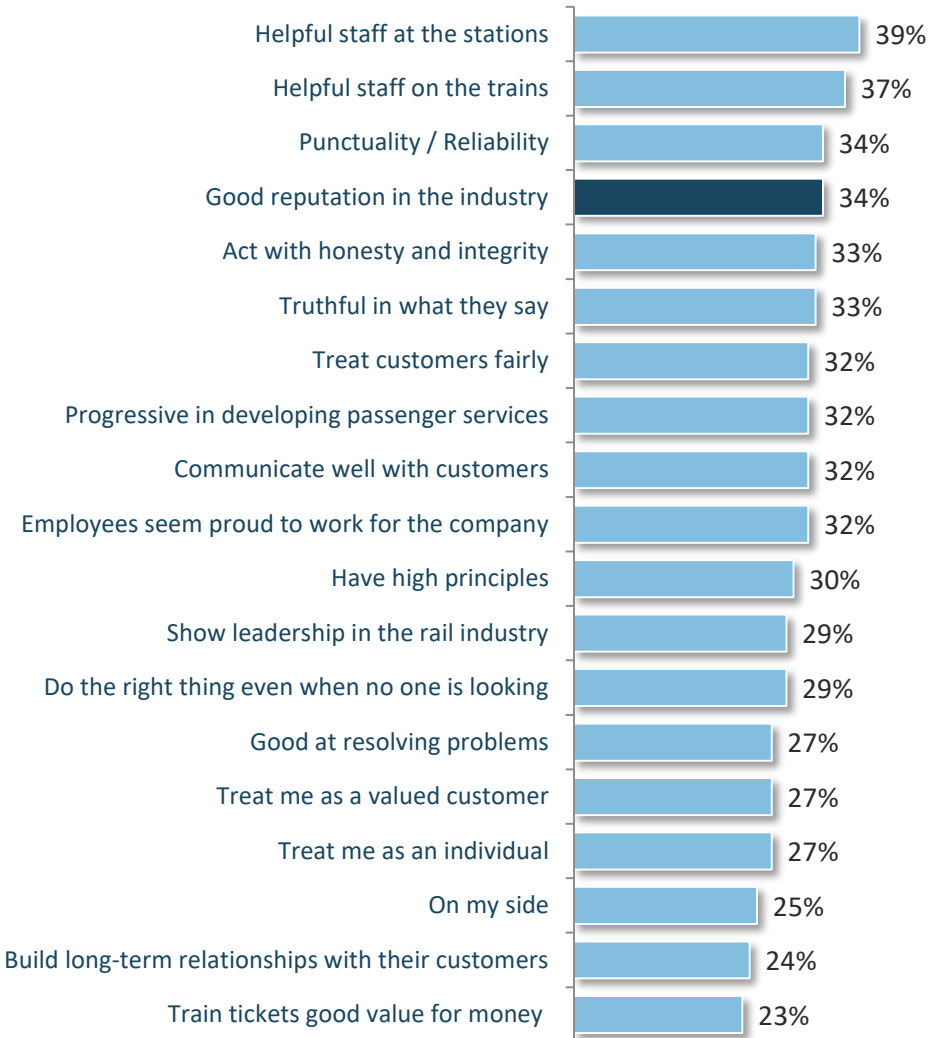
% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in having a good reputation in the industry

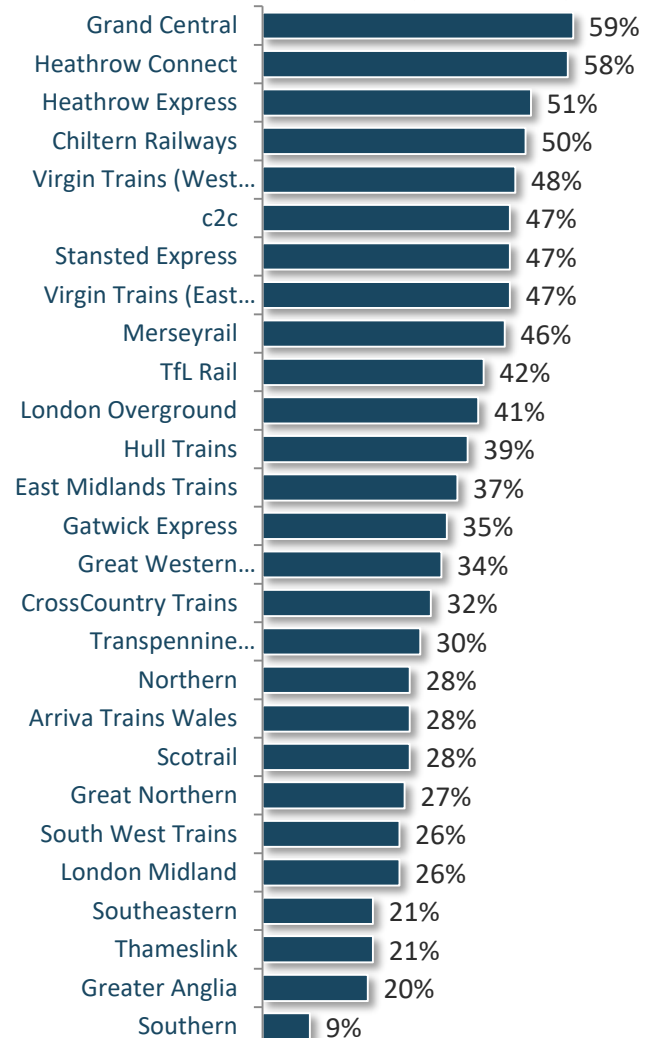
% Agree (top 2 box) – overall



Key driver ranking



% Agree (top 2 box) by TOC



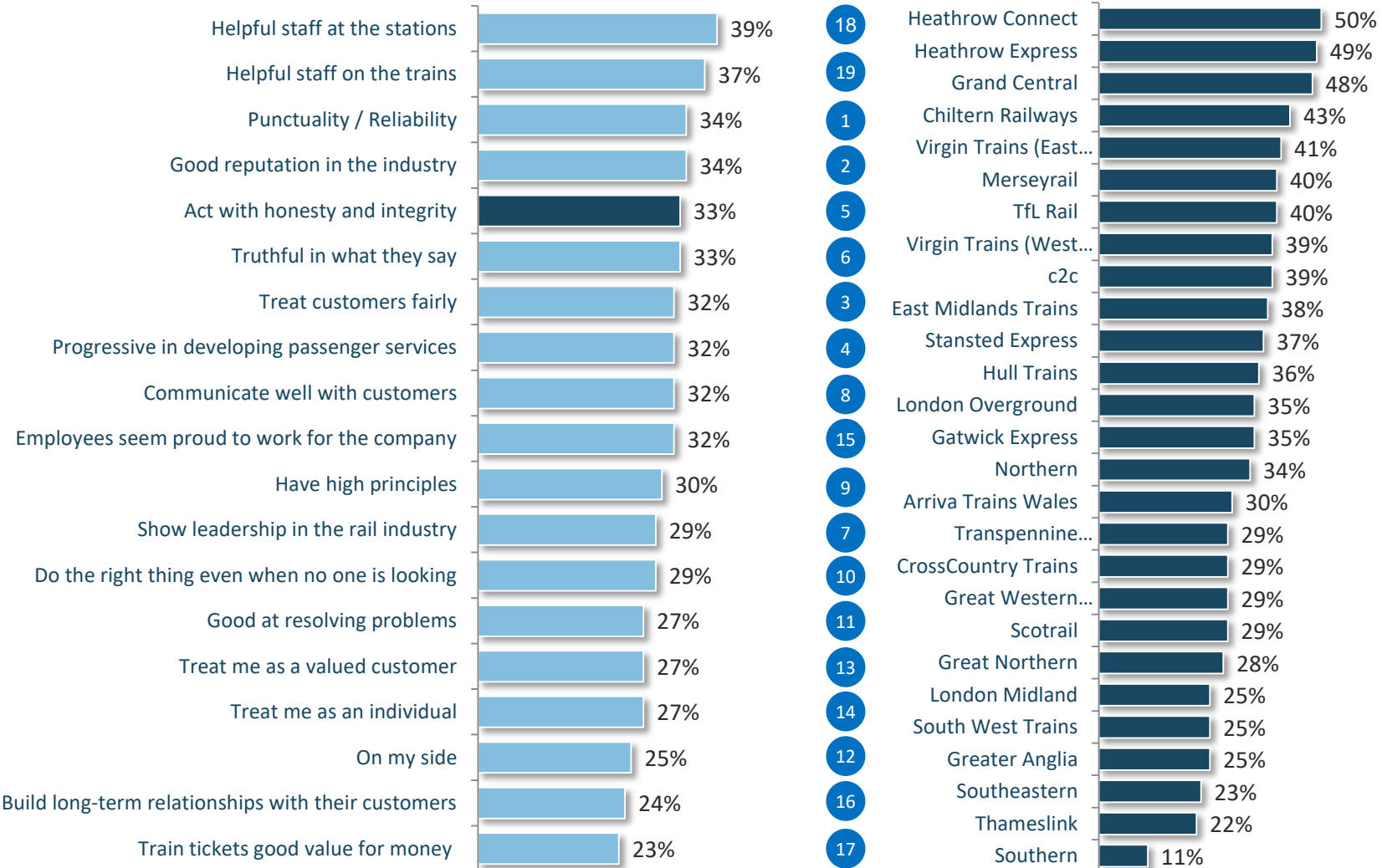
D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in acting with honesty and integrity

% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



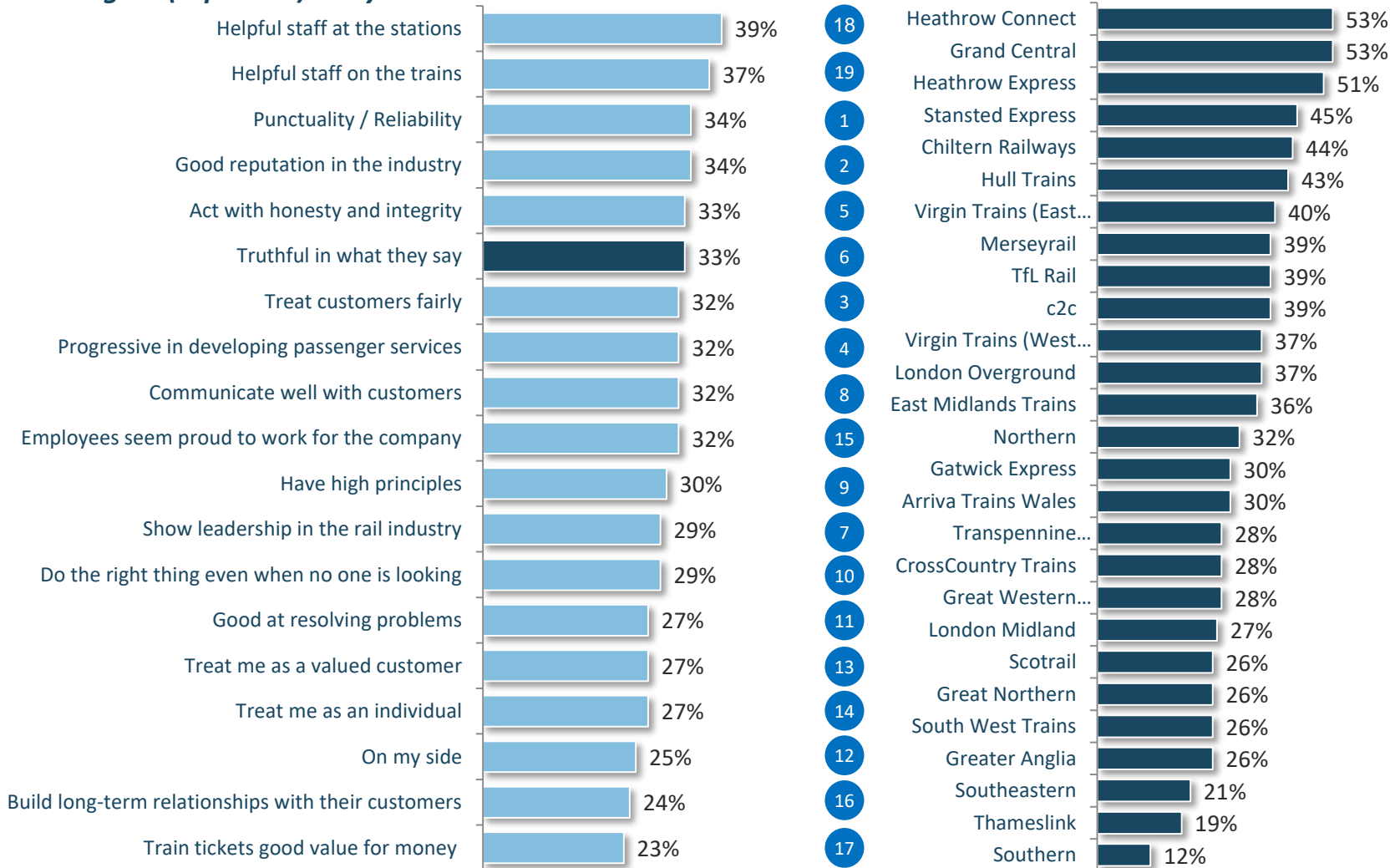
D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in being truthful in what they say

% Agree (top 2 box) – key drivers

Key driver ranking

% Agree (top 2 box) by TOC

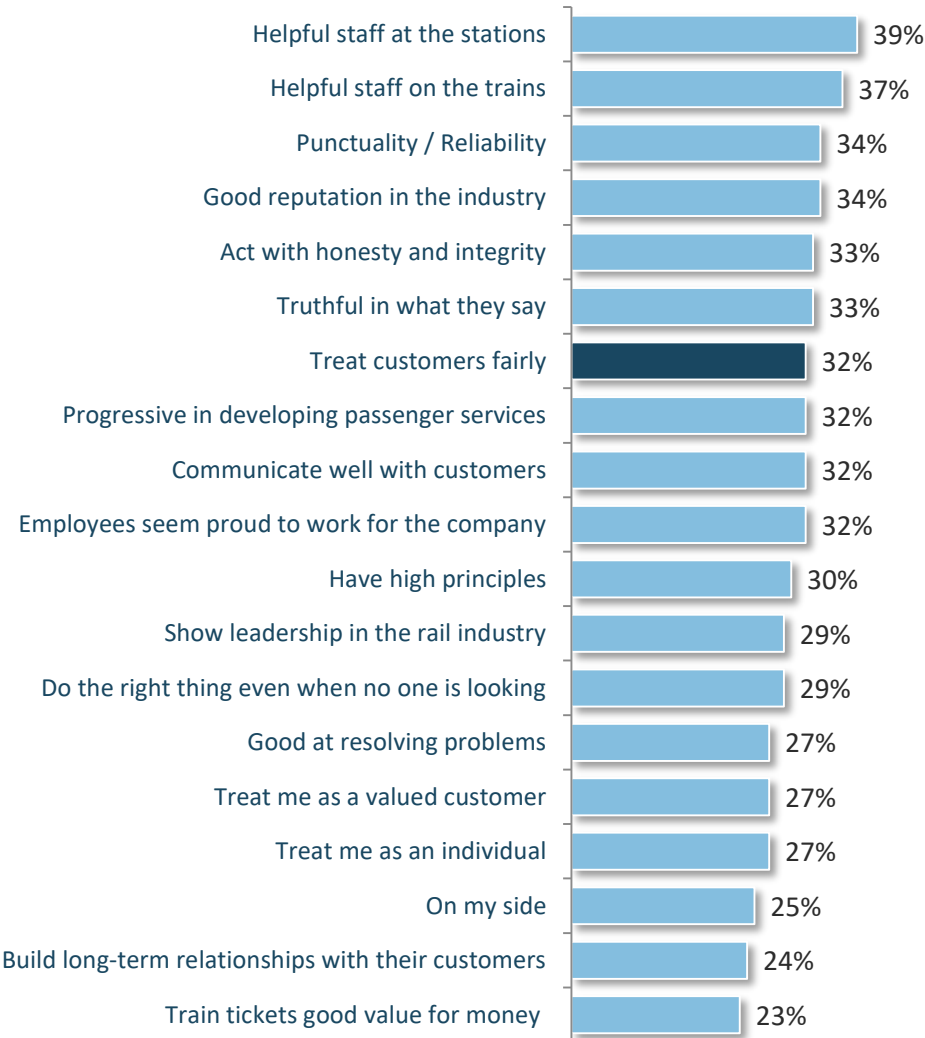


D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in treating customers fairly



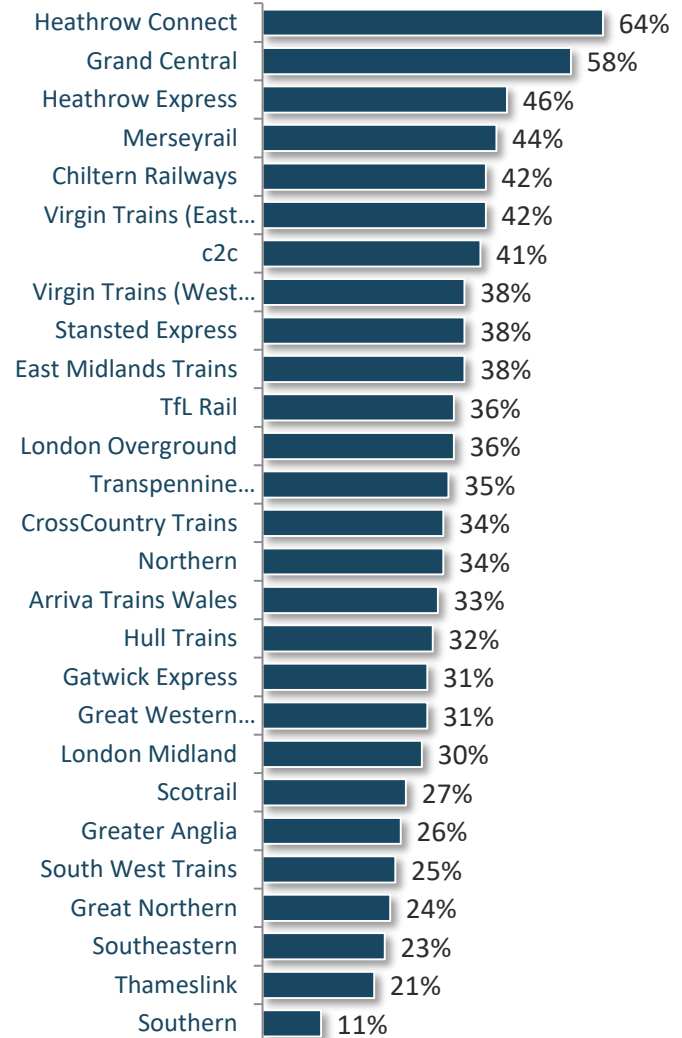
% Agree (top 2 box) – overall



Key driver ranking



% Agree (top 2 box) by TOC



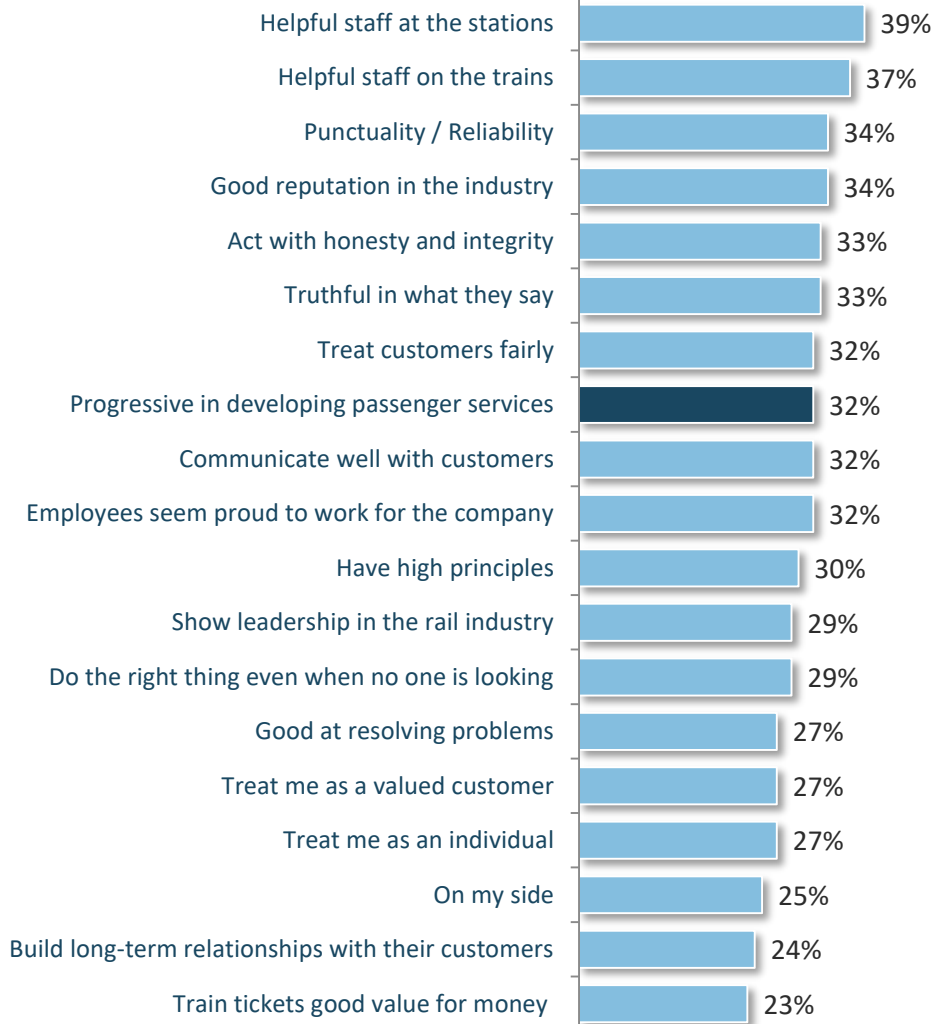
D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in being progressive in developing services to meet customers' needs



JUDGEMENT

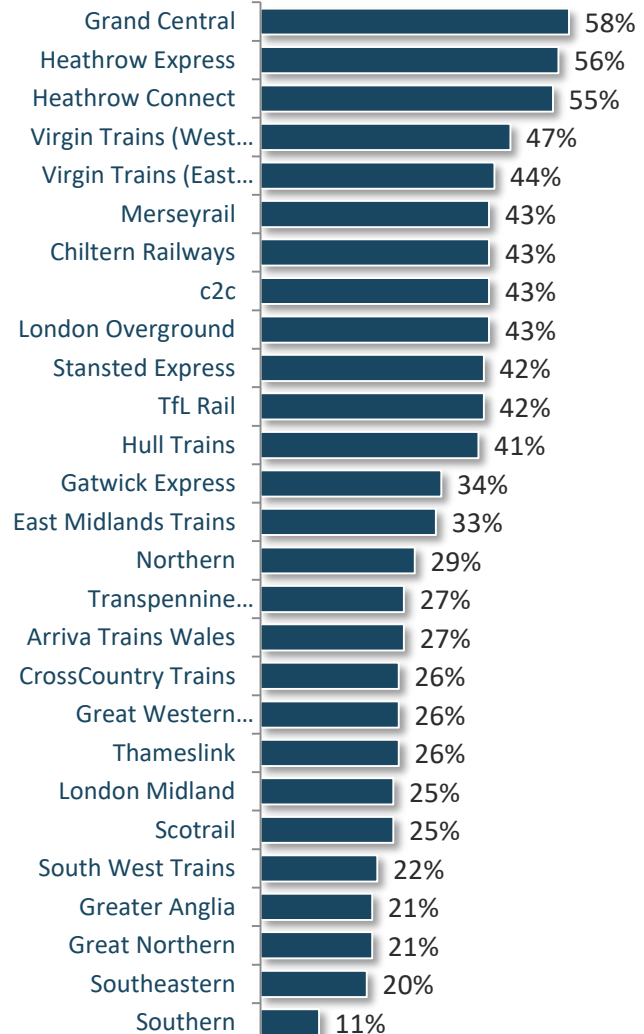
% Agree (top 2 box) – key drivers



Key driver ranking



% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

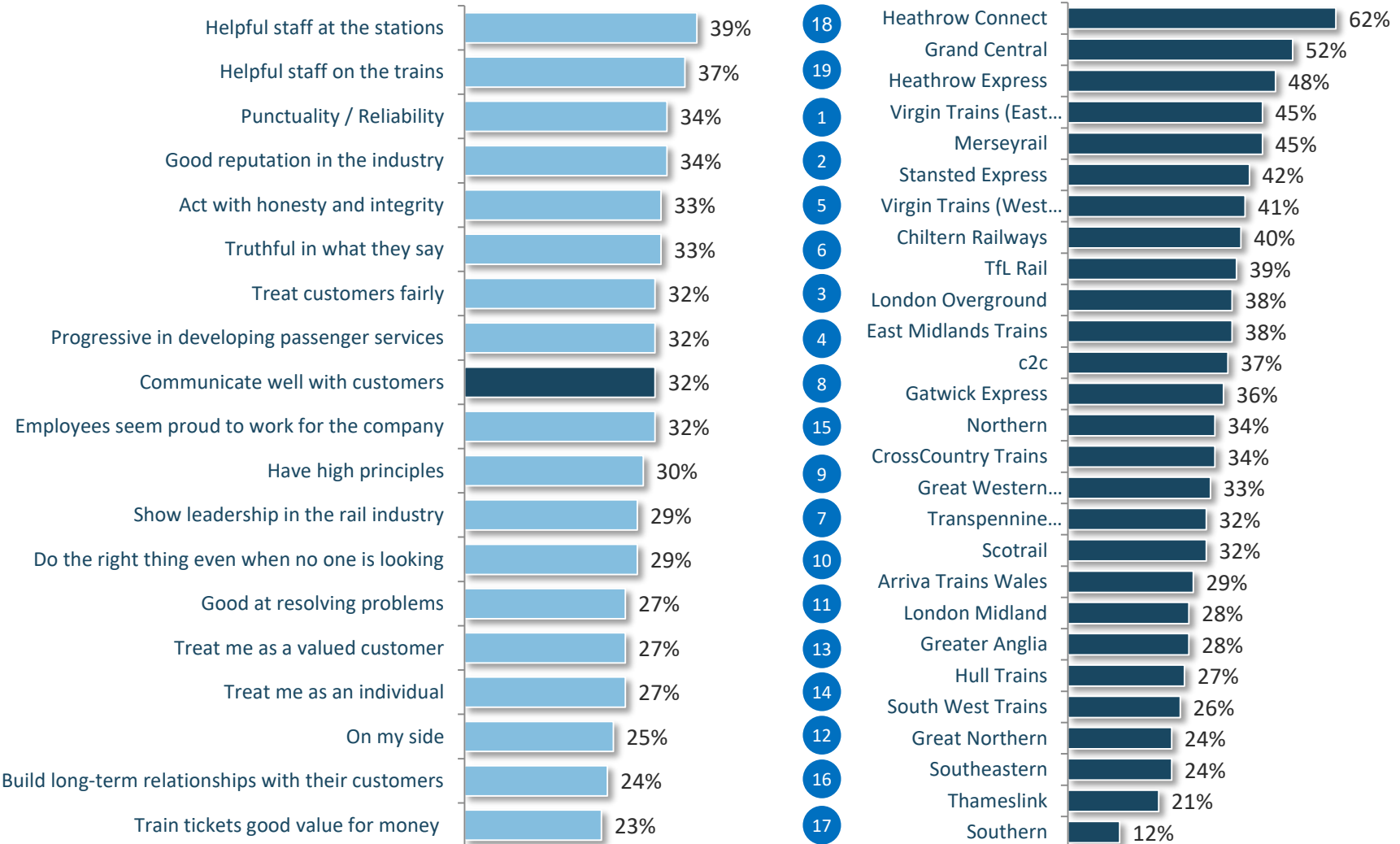
Performance in communicating well with customers



% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

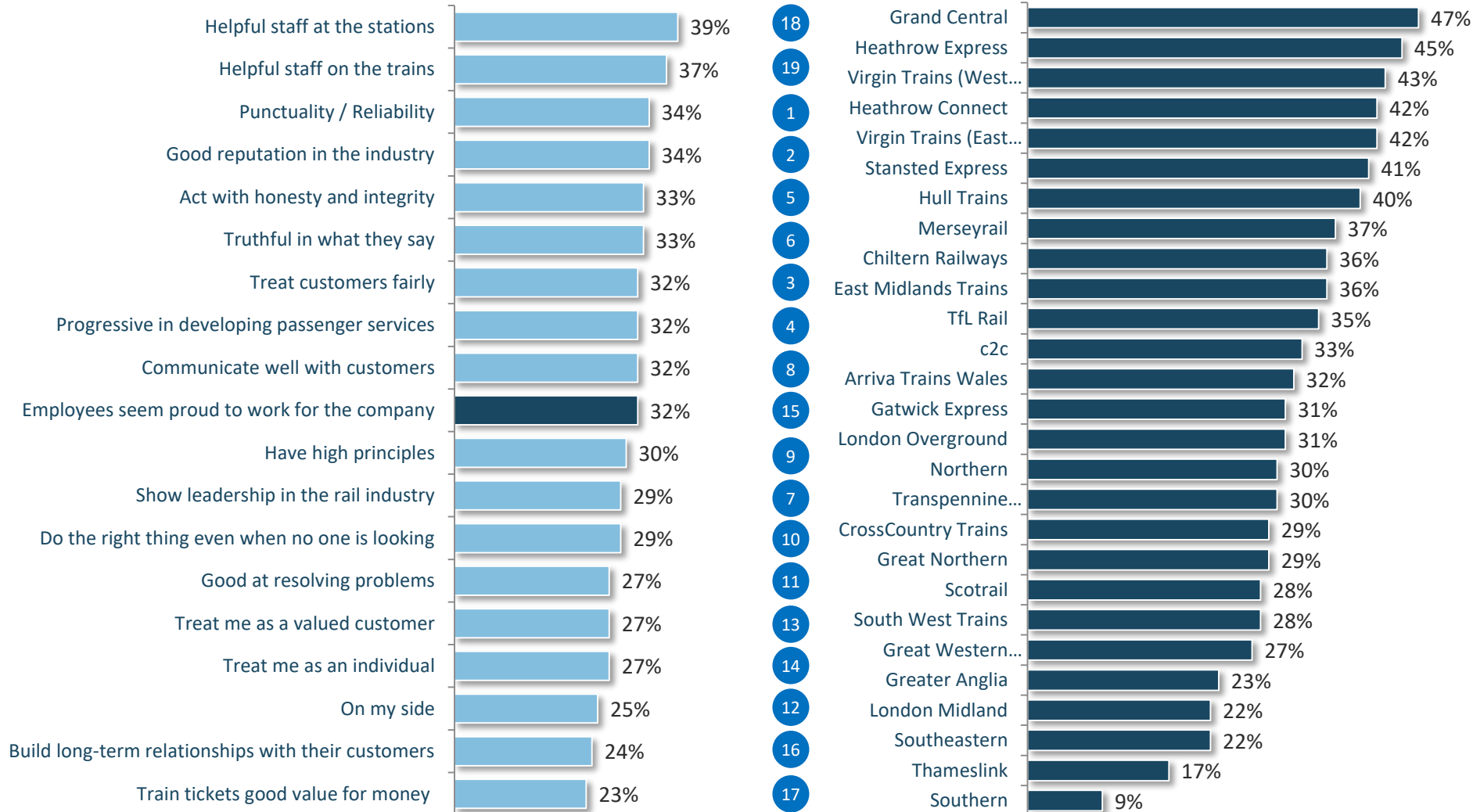
Performance in employees seeming proud to work for the company



% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in having high principles

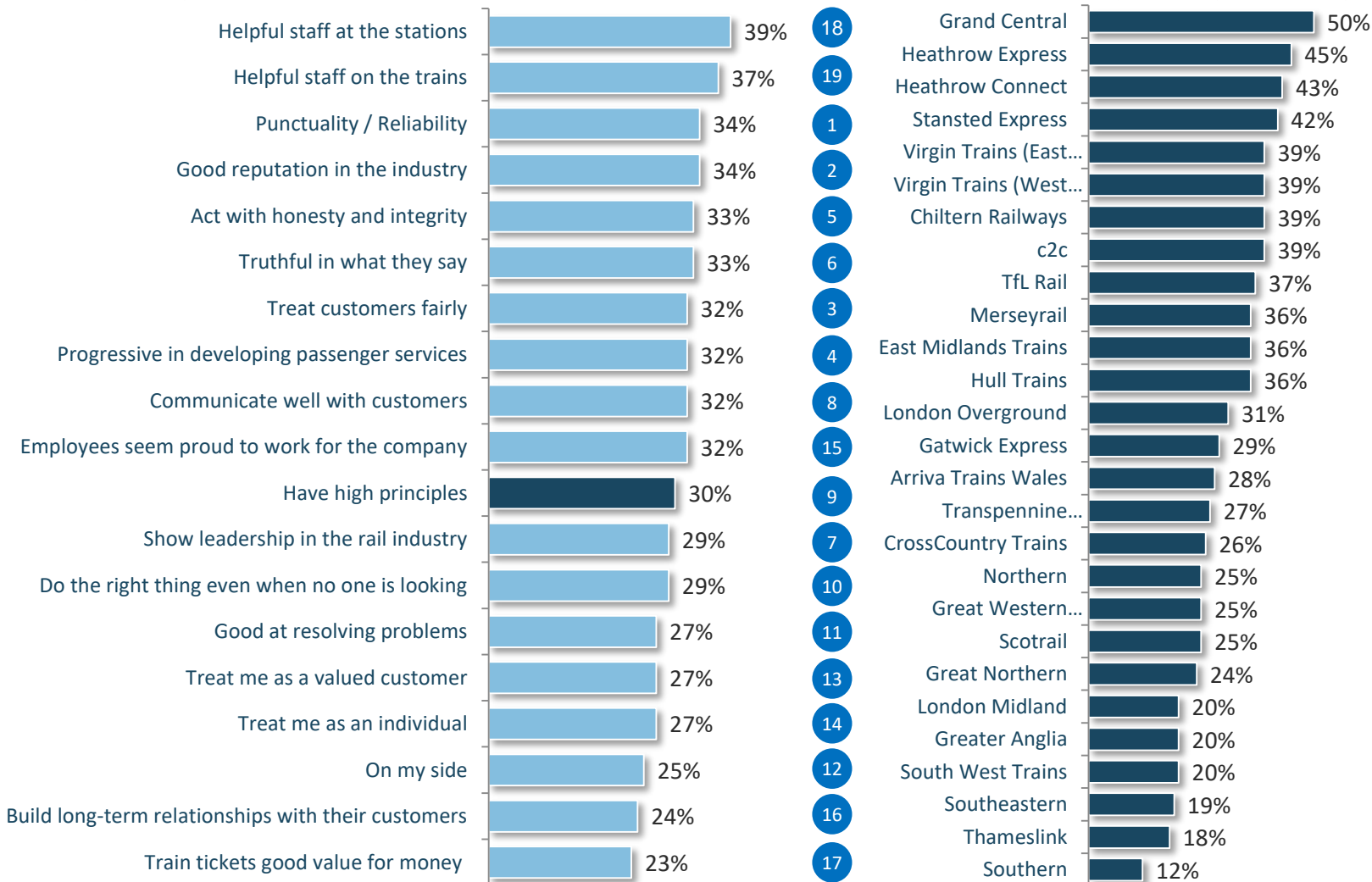


JUDGEMENT

% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



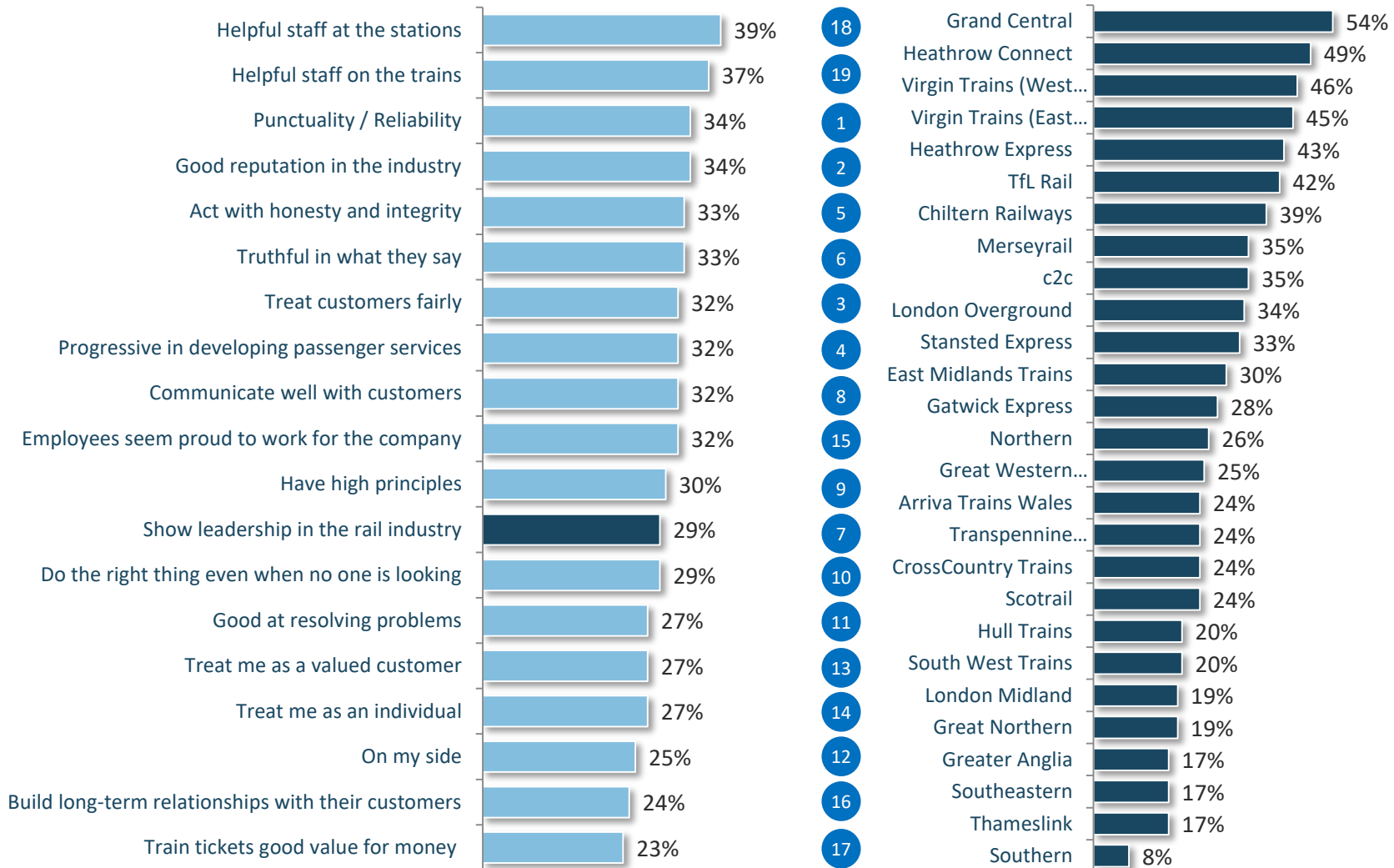
D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in showing leadership in the rail industry

% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

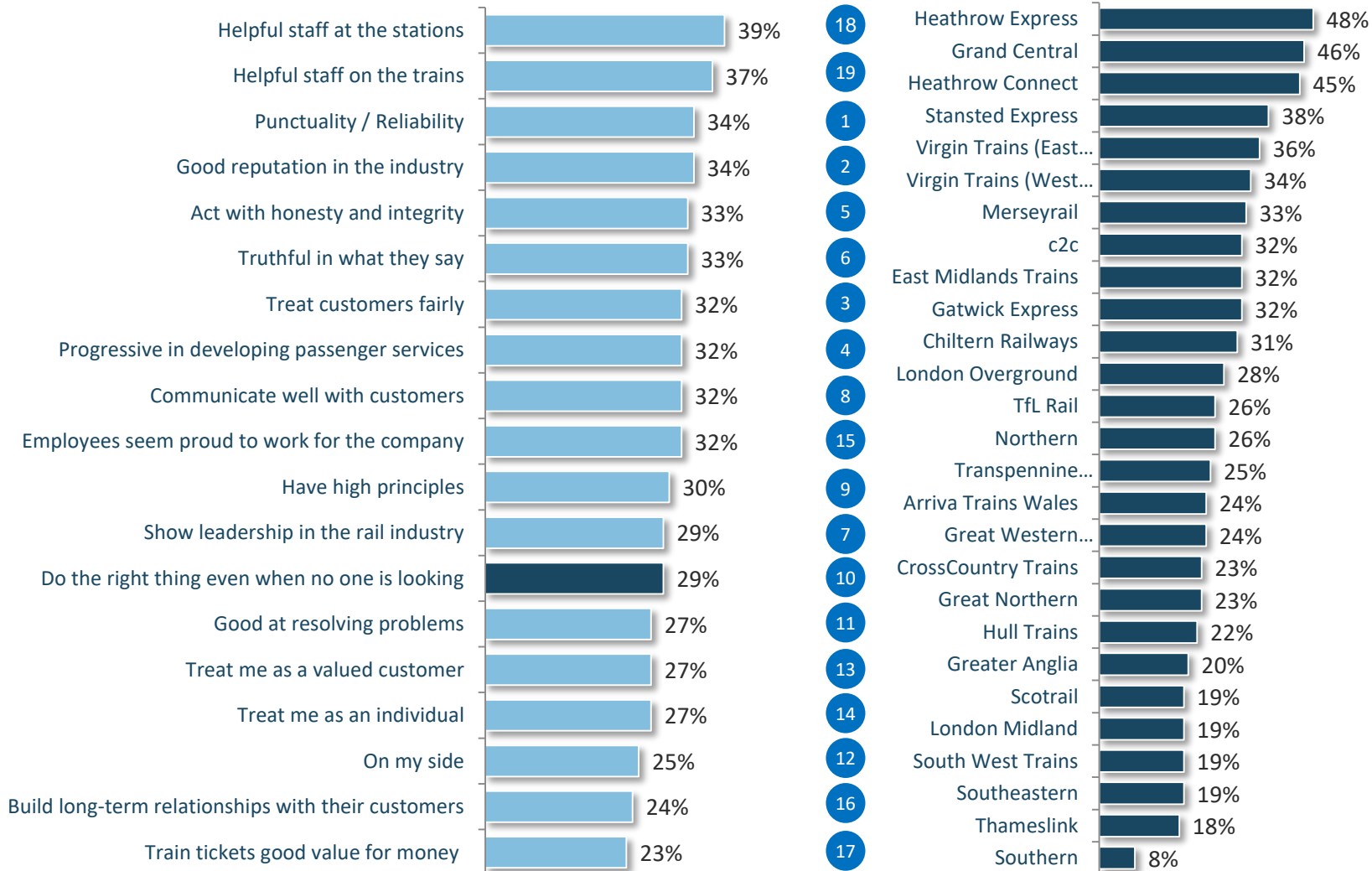
Performance in doing the right thing when no one is looking



% Agree (top 2 box) – key drivers

Key driver ranking

% Agree (top 2 box) by TOC

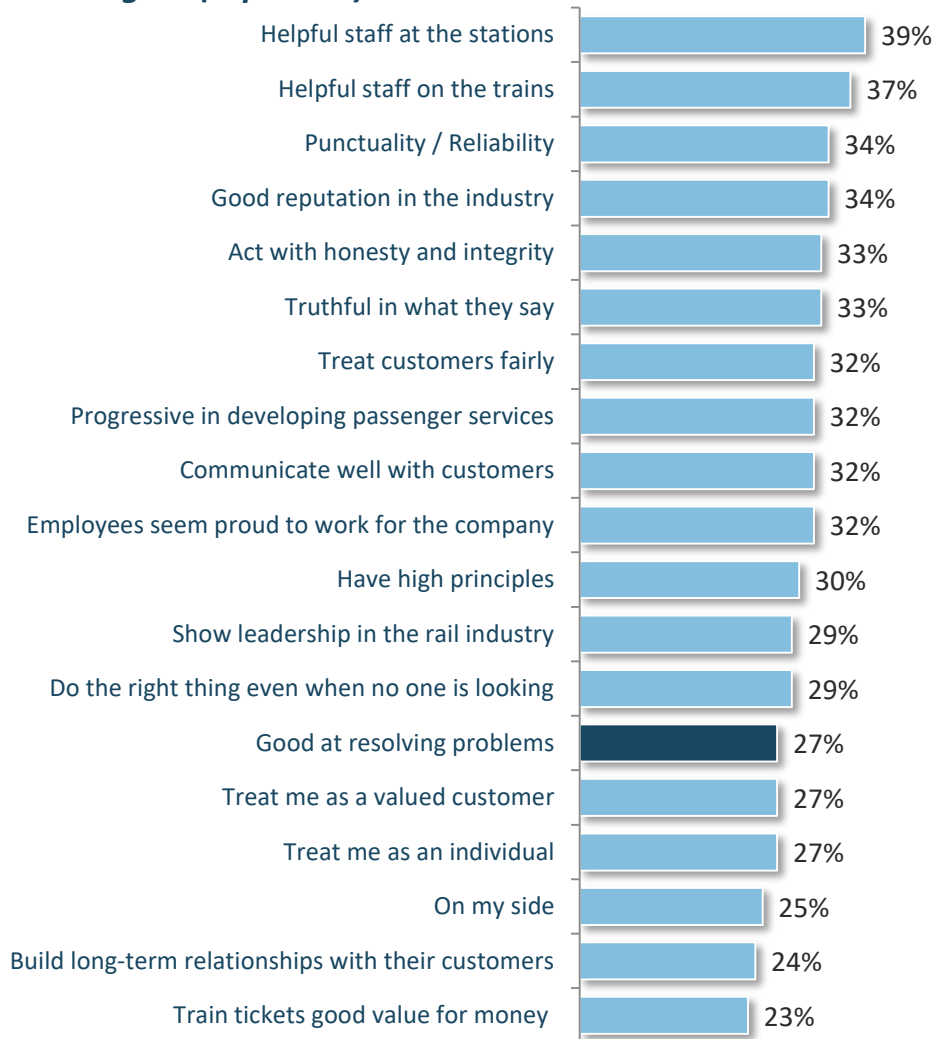


D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in being good at resolving problems



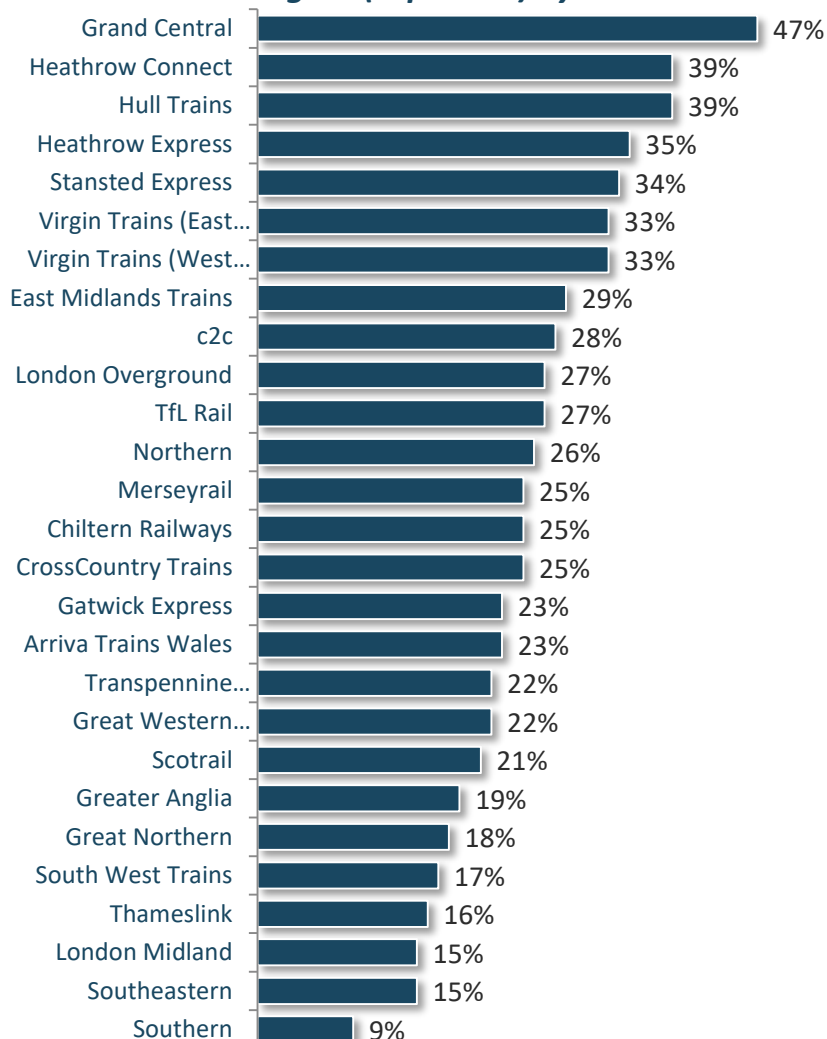
% Agree (top 2 box) – overall



Key driver ranking



% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

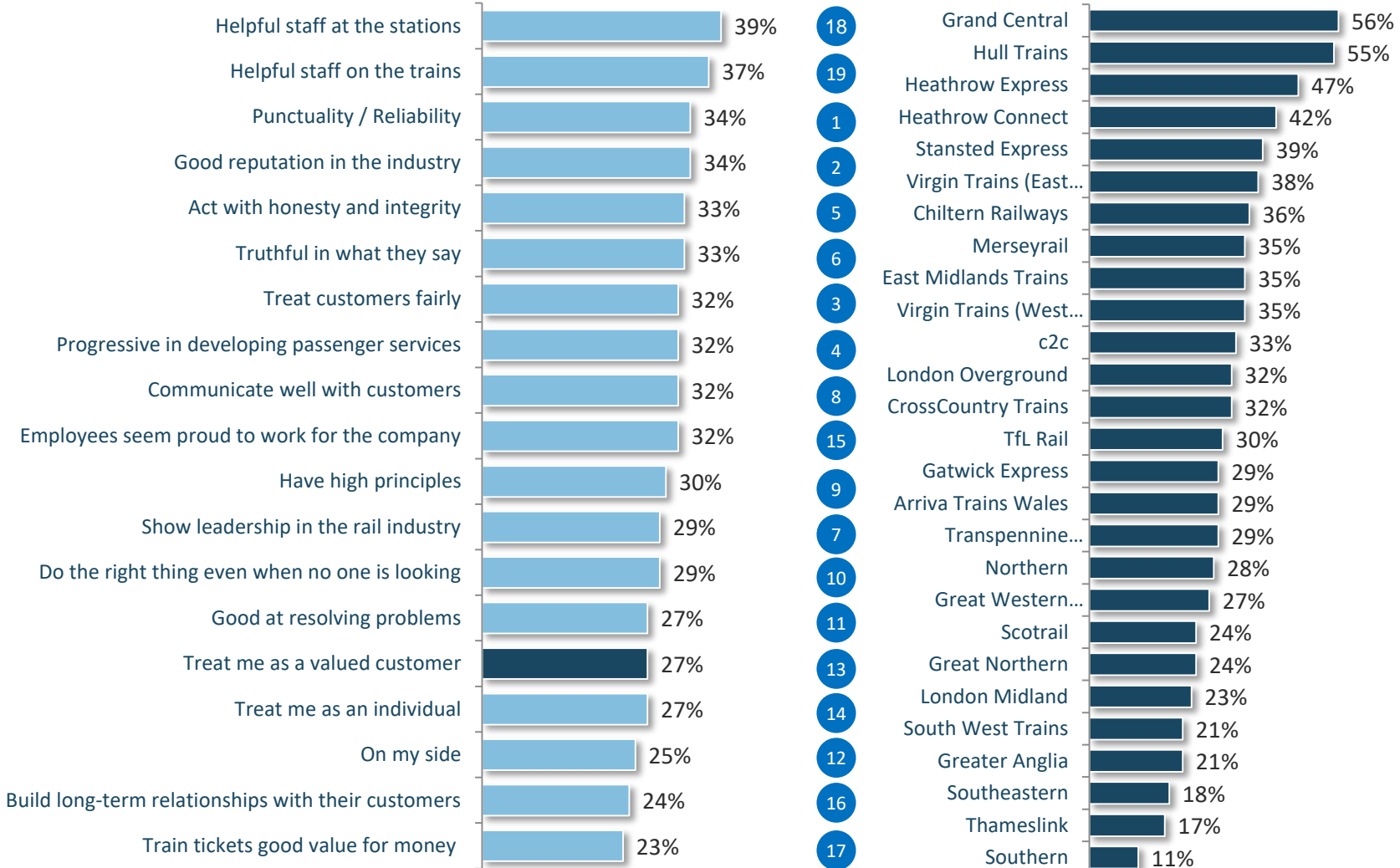
Performance in treating passengers as valued customers



% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

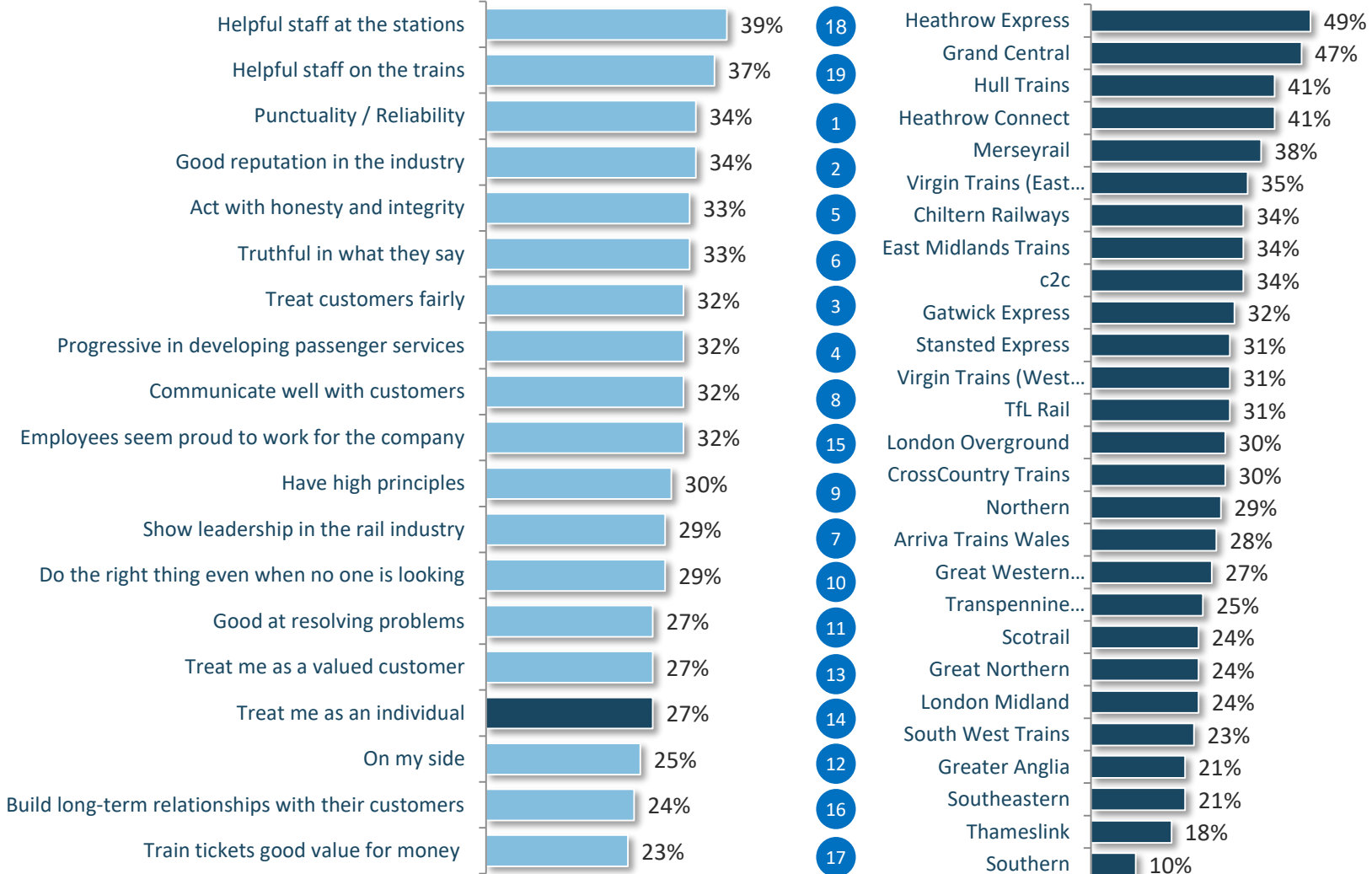
Performance in treating customers as individuals



% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in being on my side

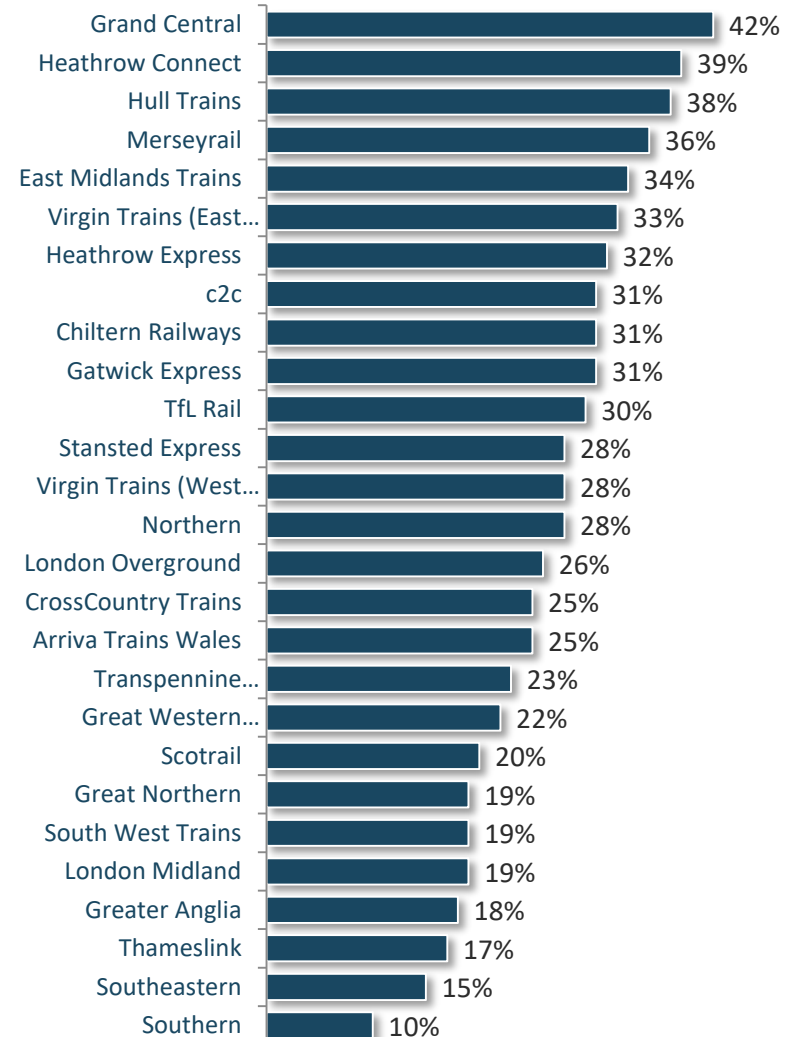


% Agree (top 2 box) – overall



Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Performance in building long term relationships

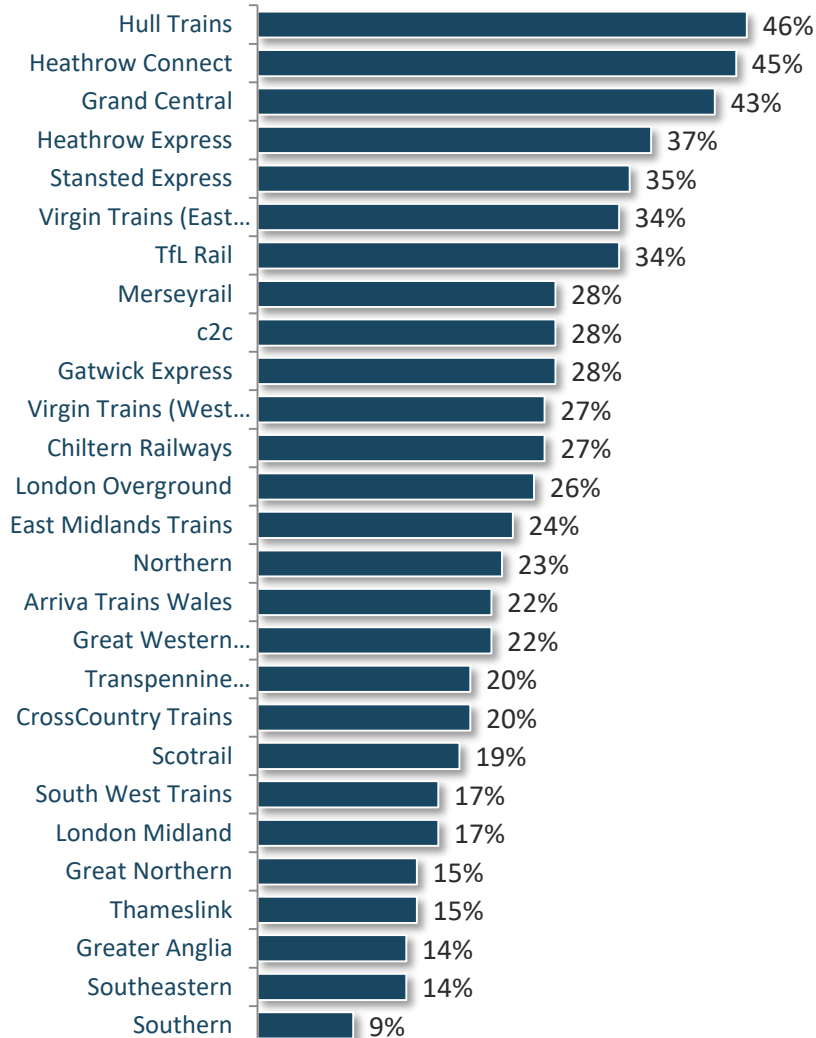


% Agree (top 2 box) – overall



Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

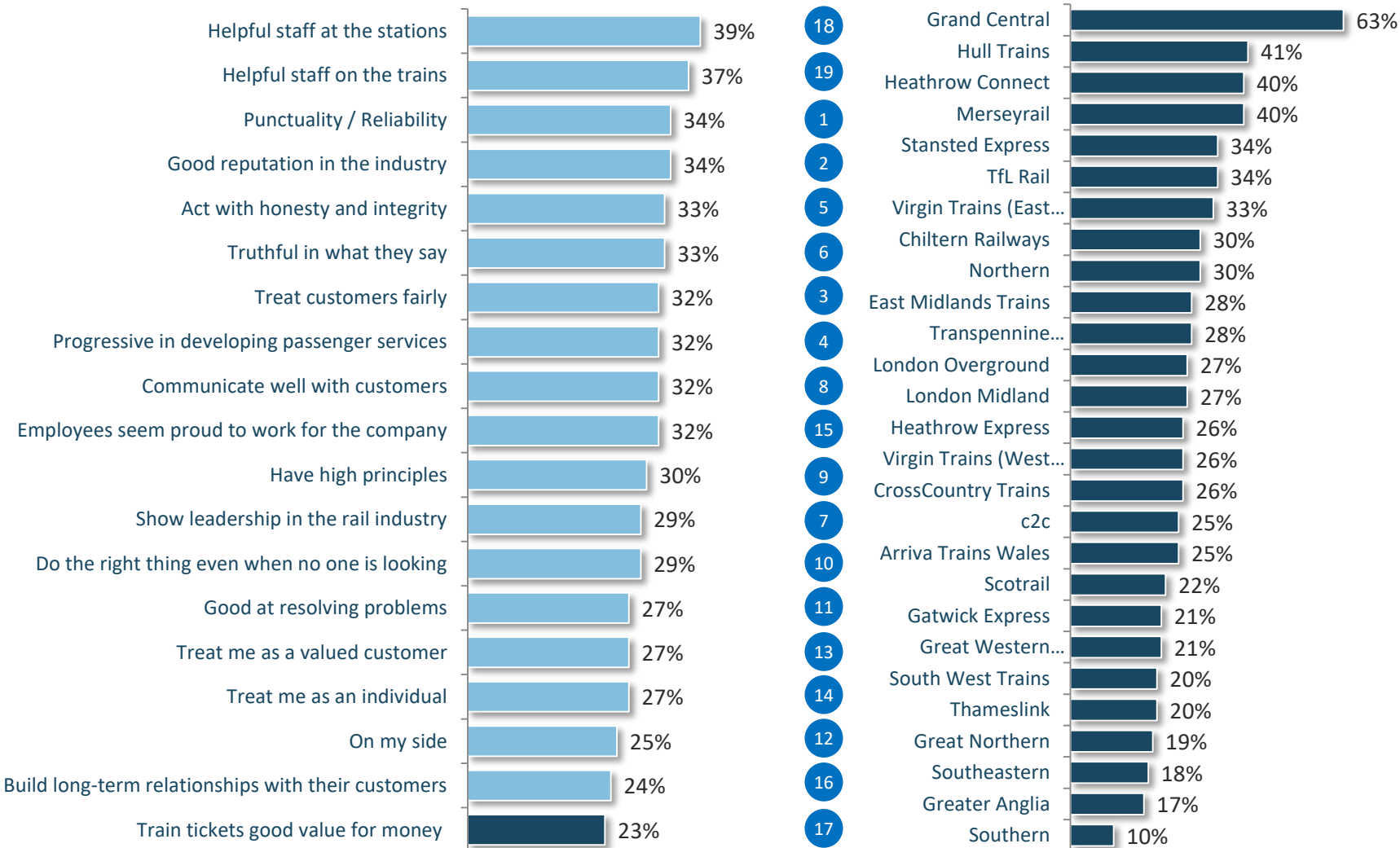
Performance in ticket prices offering value for money



% Agree (top 2 box) – overall

Key driver ranking

% Agree (top 2 box) by TOC



D1-3. How much do you agree or disagree with each of these statements on a scale of 1-7, where 1 means 'disagree strongly' and 7 means 'agree strongly'?

Train company and industry communications



Summary: what passengers have seen/heard about train companies and services

Two-thirds (64%) of passengers say that they have seen/heard something recently about the railways

- Although much of what has been seen/heard is mixed, the sentiment generally leans towards the negative, with 34% of those who have seen/heard something saying it was generally negative, and 43% saying it was mixed

Passengers of Southern, Thameslink, Southeastern and South West Trains are the most likely to have seen/heard something negative

- This ranges from 44% saying it was mainly negative for South West Trains passengers up to 67% for Southern passengers

Seeing or hearing something positive or negative about the railways also has a relationship with how well passengers perceive TOCs to be communicating with customers

- TOCs whose passengers have seen/heard more positive things tend to also be those rated highly for communicating well with customers
- TOCs whose passengers have seen/heard more negative things are those rated more poorly for communicating well with customers

However, it is hard from this data to understand which is the driver – those who are positive anyway are likely to be more disposed to hear positive things as much as hearing something positive could drive the passenger's overall perceptions of the train company

Those hearing positive stories are more likely than average to have seen/heard something via posters/leaflets and directly from the train company

Those hearing negative stories are more likely to have seen/heard something via TV/Radio and print/online news

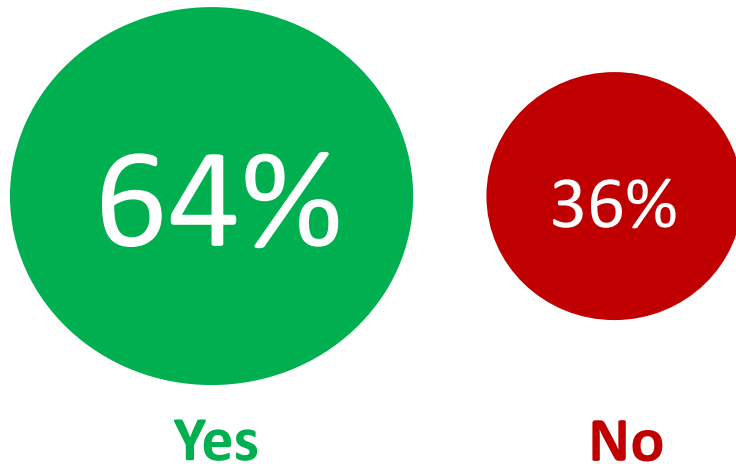
Digital is a key channel for information – whether that's online news, general social media, or social media from train companies

For the majority of TOCs, digital is the main channel that people have used

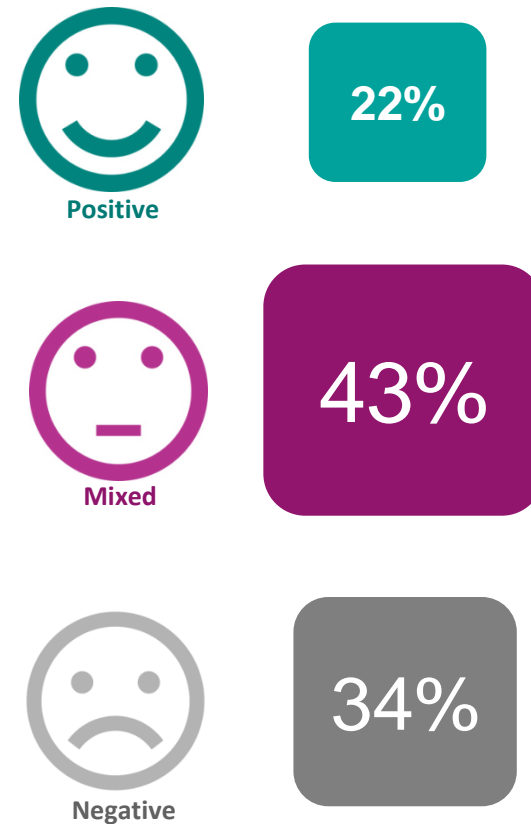
- Notable exceptions to this are for passengers of TOCs who have heard mainly negative news. For Southern, Southeastern and South West Trains TV/radio is the mostly likely channel for information

Almost two thirds of passengers have seen or heard something about train companies or services, with three quarters of those having heard negative or mixed information

Whether passengers have seen or heard about train services or companies recently



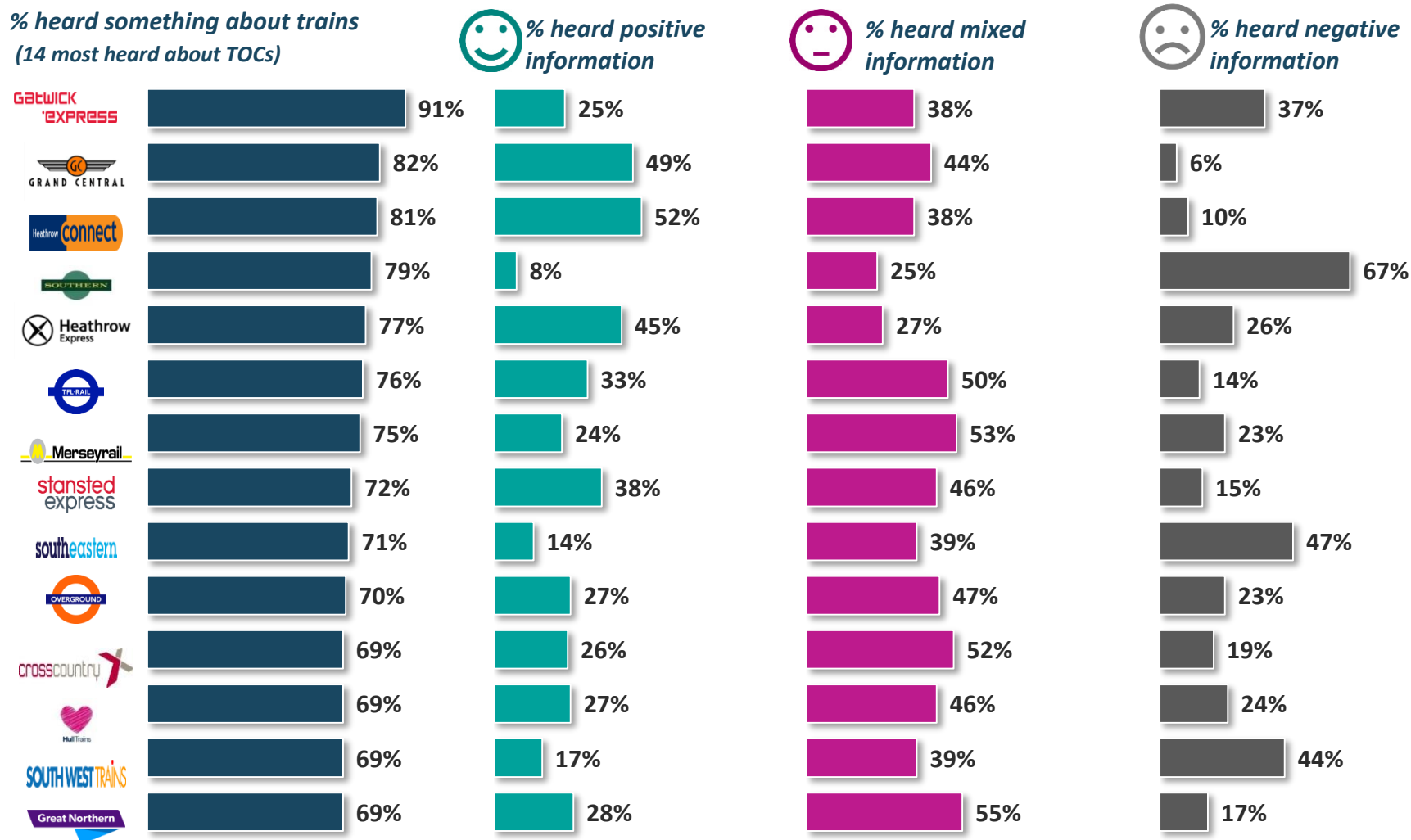
The tone of information seen or heard



E1. Where have you seen or heard anything about the railways (train services and companies) recently? (Base: 12,804);

E2. On balance, would you describe everything you have heard or read about the railways recently as generally positive or generally negative? (Base: 8,048)

Among those who have seen or heard the most about train companies, passengers of Southern, Southeastern, South West Trains and Gatwick Express stand out as having heard particularly negative information (slide 1 of 2)




E1. Where have you seen or heard anything about the railways (train services and companies) recently?
 E2. On balance, would you describe everything you have heard or read about the railways recently as generally positive or generally negative?

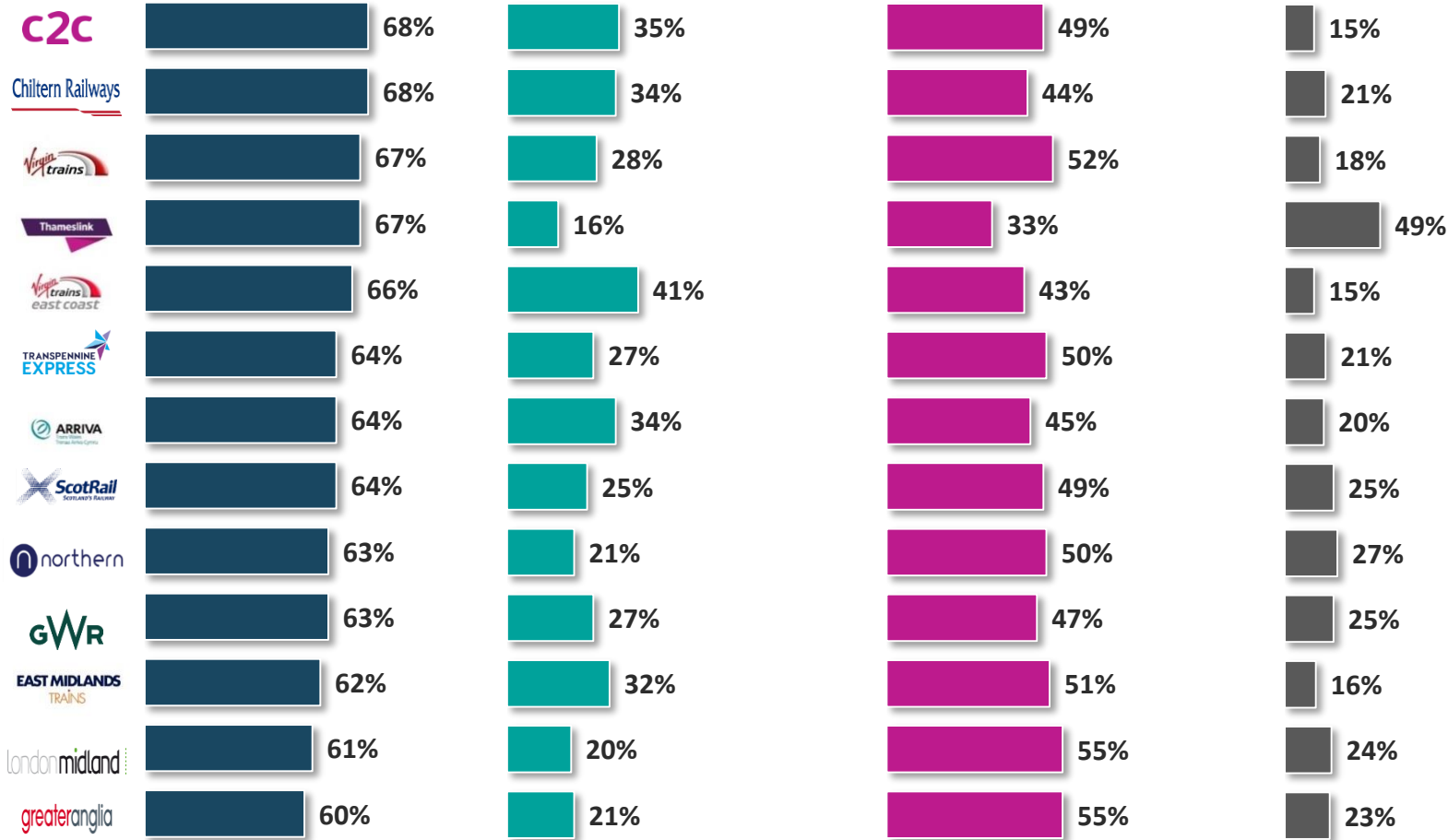
Similarly, passengers of Thameslink are more likely to have seen or heard something negative (slide 2 of 2)

% heard something about trains
(13 less heard about TOCs)

 **% heard positive information**

 **% heard mixed information**

 **% heard negative information**

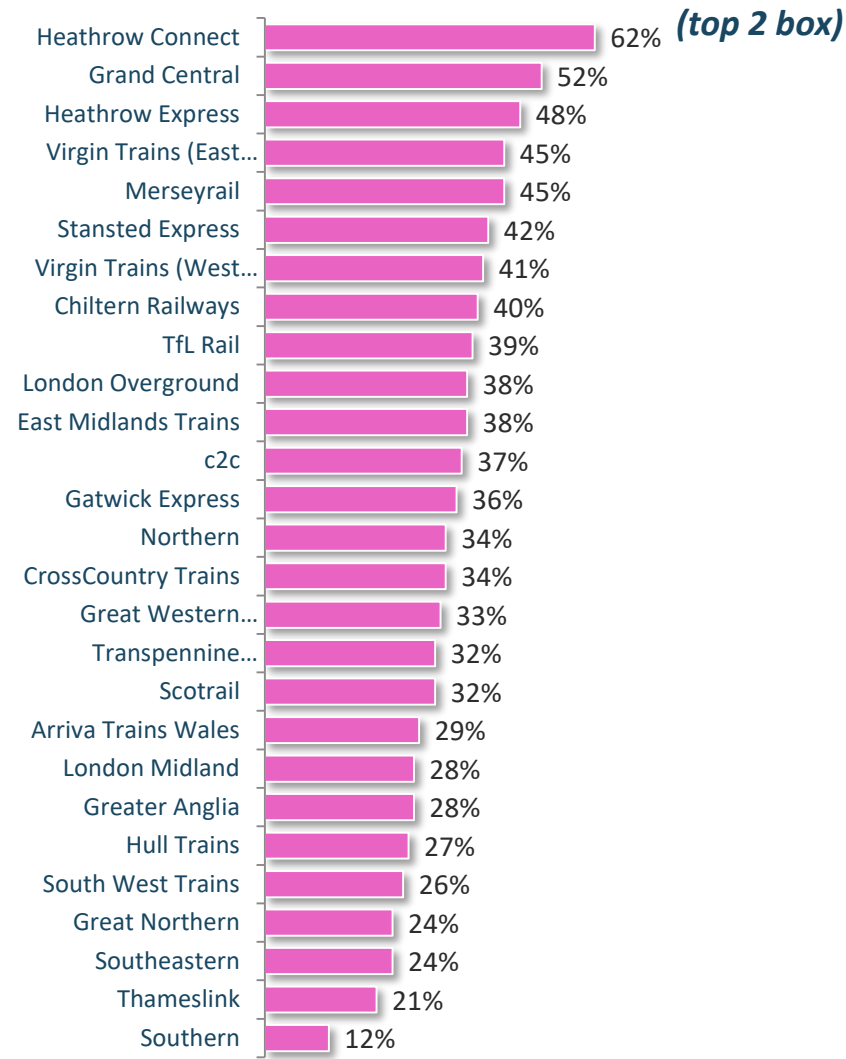


E1. Where have you seen or heard anything about the railways (train services and companies) recently?

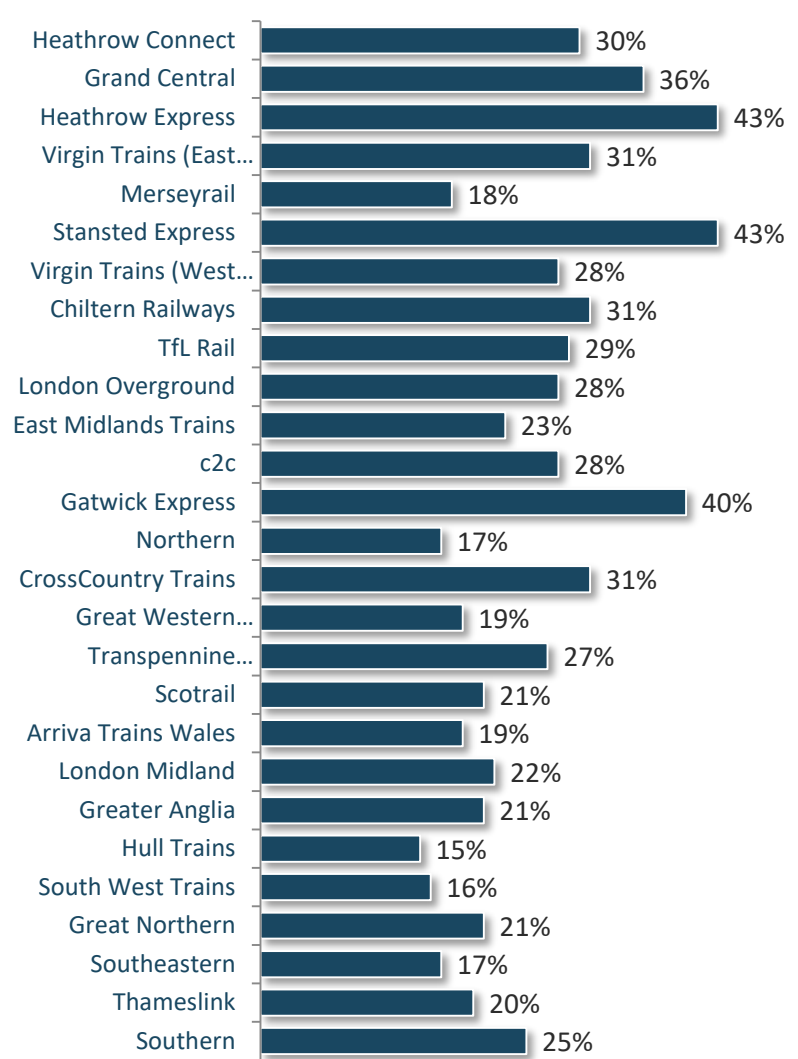
E2. On balance, would you describe everything you have heard or read about the railways recently as generally positive or generally negative?

Communicating does not necessarily mean communicating *well*, as passengers of TOCs who have seen/heard something directly from a train company are not always those who agree that their TOC communicates well with customers

% Agree that TOC communicates well with customers

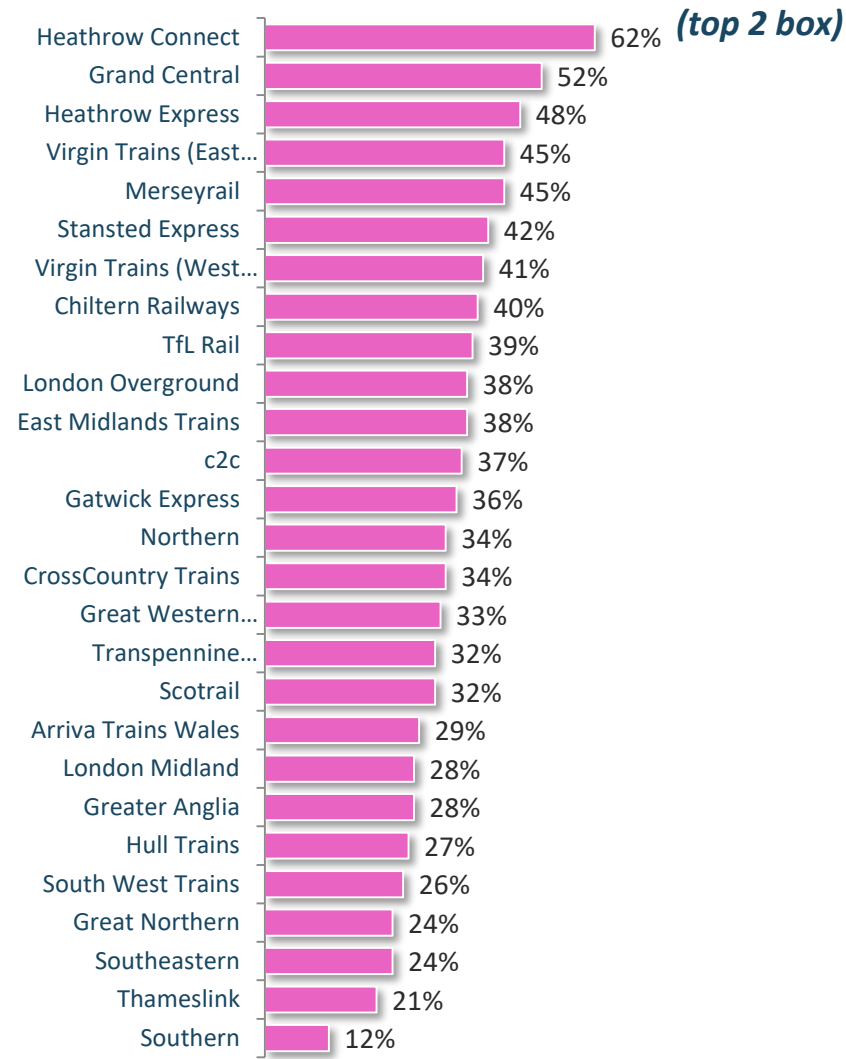


% Seen/heard something from train company

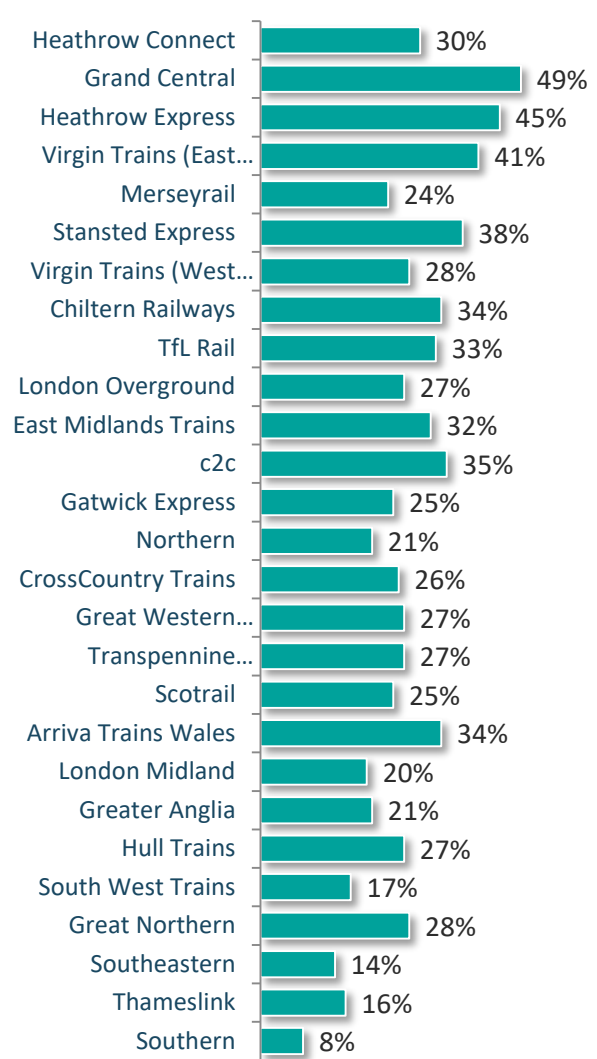


Rather, the TOCs whose passengers are most likely to agree that they communicate well with customers are generally those whose passengers were more likely to have seen/heard something positive about the railways in general

% Agree that TOC communicates well with customers

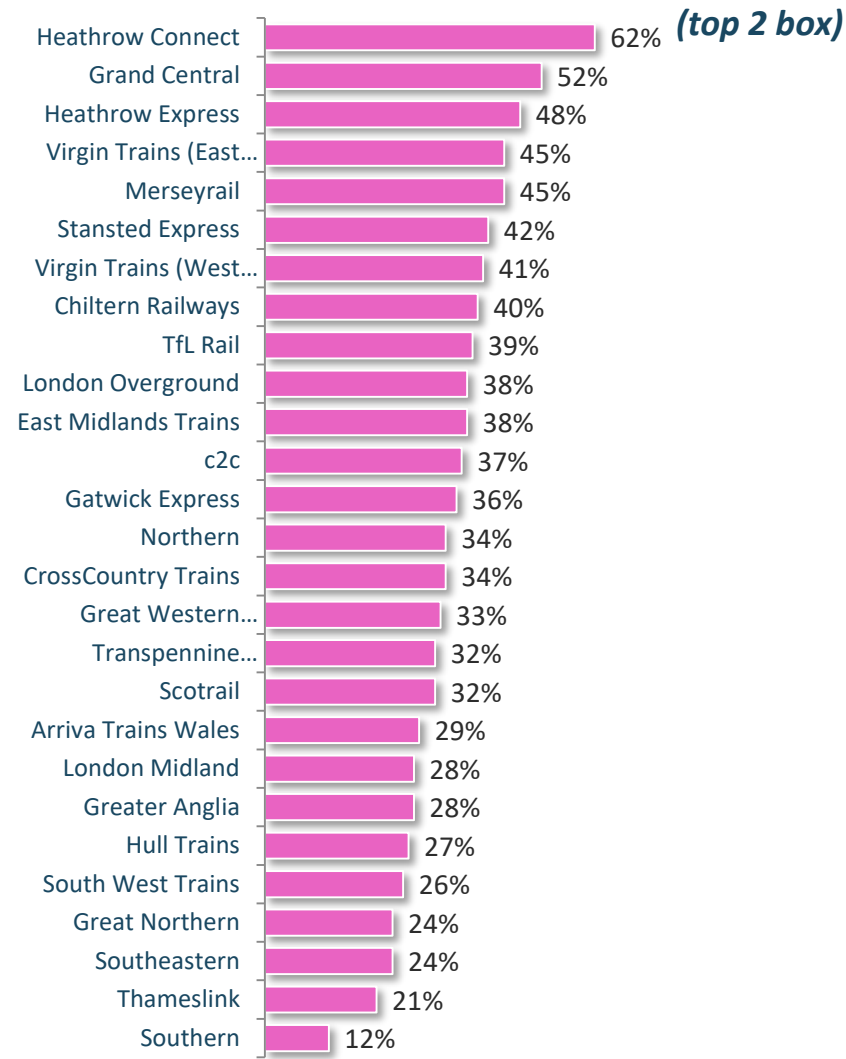


% Seen/heard something positive about railways

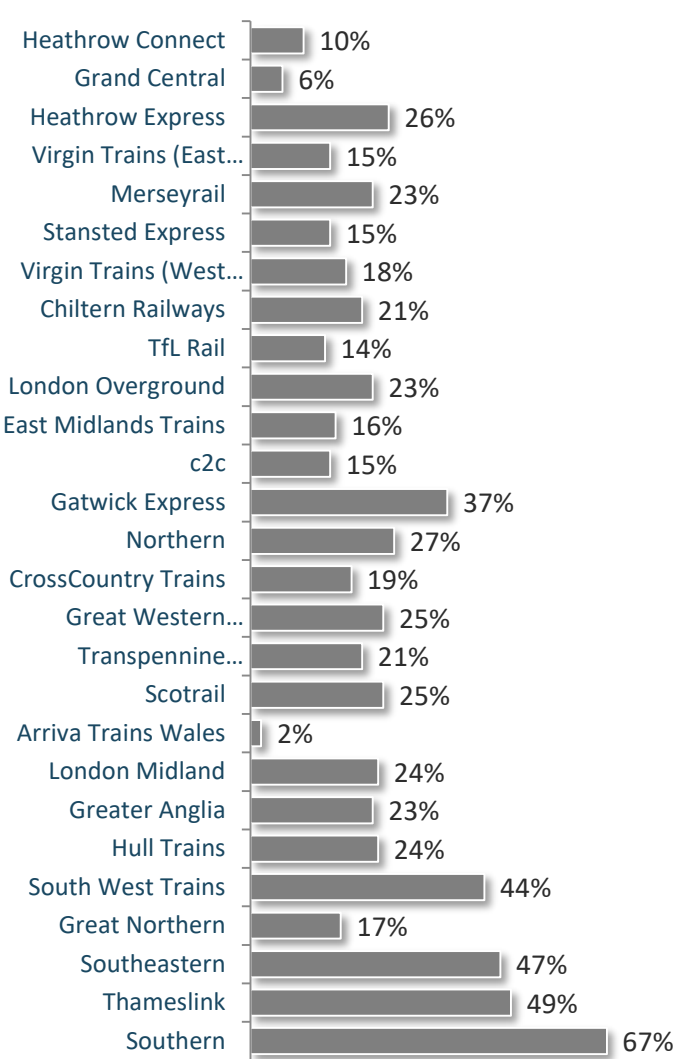


The inverse is also largely true; those TOCs perceived to communicate less well with customers are those whose passengers are most likely to have seen or heard something negative about the railways

% Agree that TOC communicates well with customers

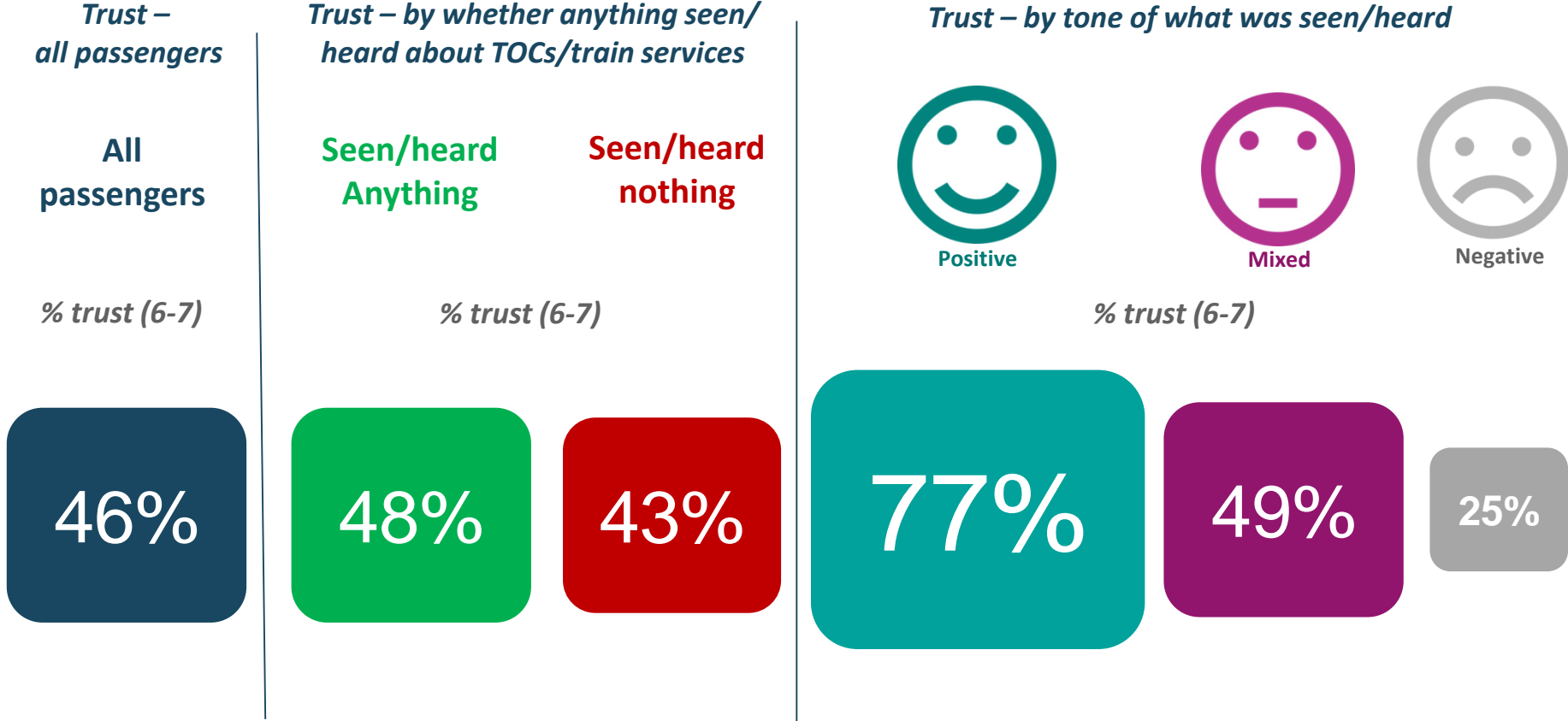


% Seen/heard something negative about railways



Overall, passengers who have heard entirely positive information about train companies or services are more likely to trust TOCs

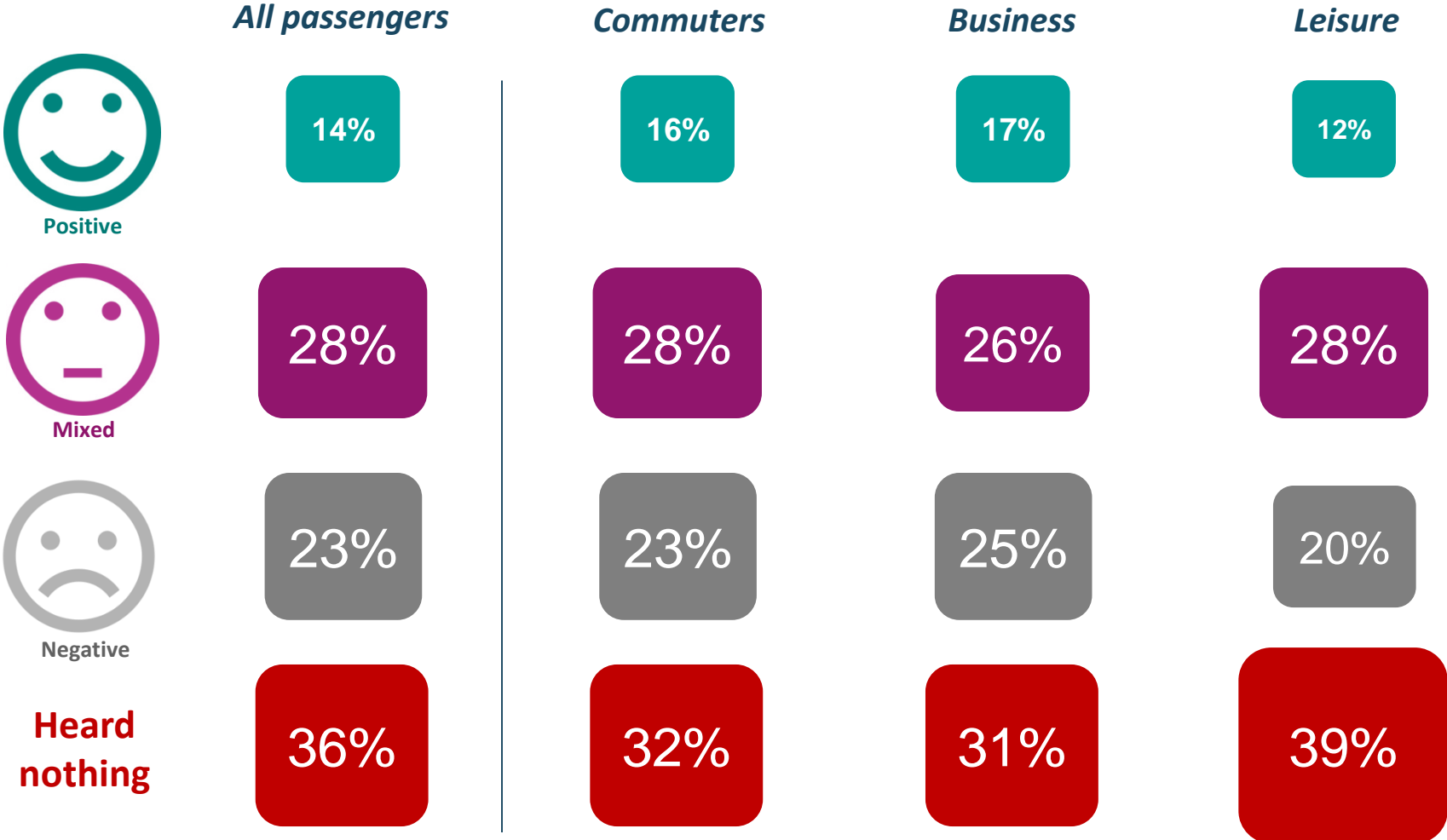
Impact on trust of what passengers have seen or heard about train services or companies recently - % trust (6-7)



B7. All things considered and on balance, how much do you trust [TOC] on a scale of 1-7 where 1 means 'don't trust them at all' and 7 means 'trust them a great deal'? (Base: 12,804)
 E2. On balance, would you describe everything you have heard or read about the railways recently as generally positive or generally negative (Base: All passengers who have heard something about railways: 8,048)

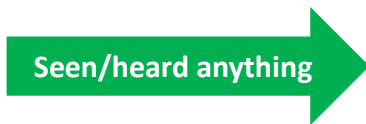
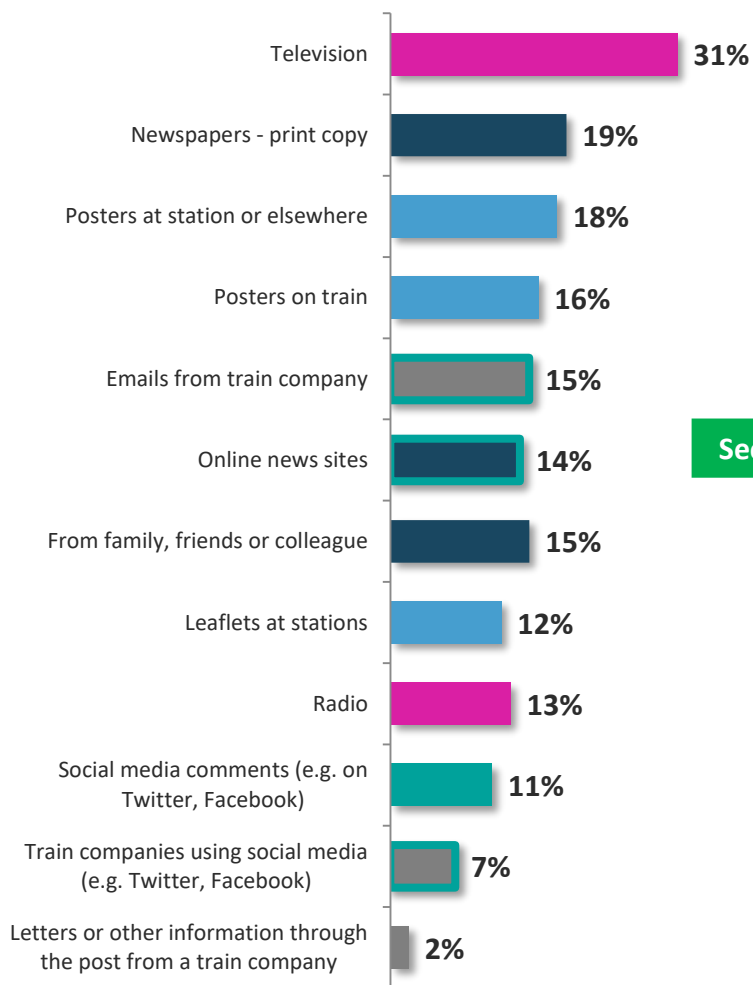
Commuters and business passengers are more likely to have seen or heard mostly negative information about train services than leisure passengers

The tone of the information seen or heard – by most frequent journey type

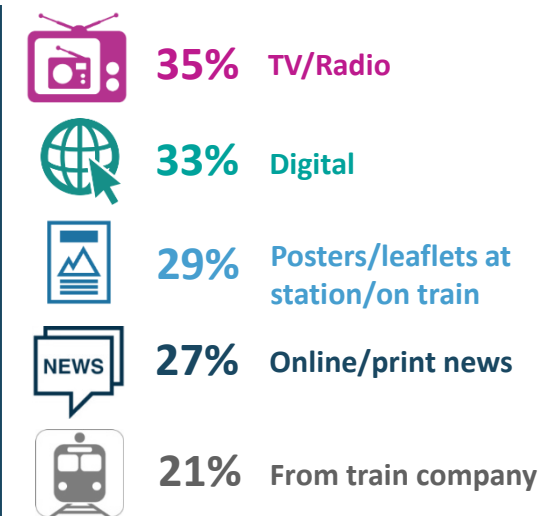


Overall passengers have seen/heard information about train services and TOCs through a variety of channels, with television being the most likely source but digital also very important

Where passengers have seen or heard about train services/companies



Summary



Information sources can fall into more than one summary code as indicated by those bars with different coloured outlines

E1. Where have you seen or heard anything about the railways (train services and companies) recently? (Base: 12,804)

Passengers who have heard positive information are more likely to have seen posters/leaflets and information from train companies than passengers who have heard negative information


% Sources of information seen or heard – by those who have heard positive/mixed/negative information

Sources seen or heard

Total seen/heard

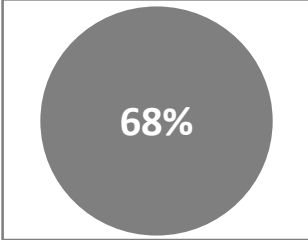
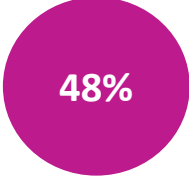
 Heard positive information

 Heard mixed information

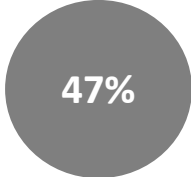
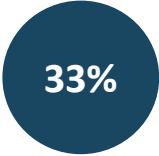
 Heard negative information



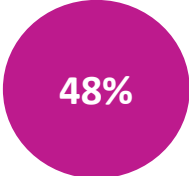
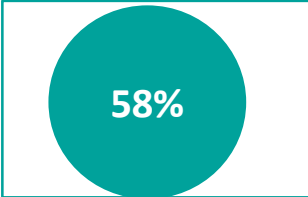
TV/Radio



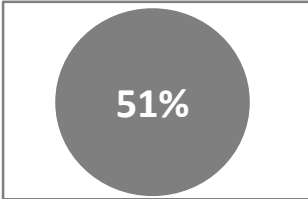
Digital



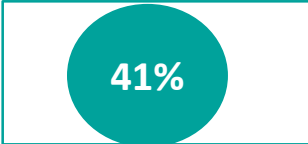
Posters/leaflets



Print/online



Train company






















For the majority of TOCs, the most likely channel through which passengers have seen or heard information is through digital channels such as online news and social media (slide 1 of 2)

% Sources of information seen – by TOC

 Most used channel

Top 14 trusted TOCs



















	Sources of information seen/heard					
	Overall Trust (6-7)	 Posters/leaflets	 Train company	 Digital	 Print/online	 TV/radio
 Heathrow Express	68%	44%	43%	58%	44%	48%
 Heathrow connect	67%	28%	30%	44%	32%	30%
 stansted express	66%	45%	43%	54%	47%	35%
 C2C	66%	37%	28%	39%	28%	27%
 Merseyrail	63%	36%	18%	31%	32%	47%
 Chiltern Railways	61%	31%	31%	37%	21%	30%
 Virgin trains east coast	61%	33%	31%	39%	21%	29%
 Virgin trains	60%	31%	28%	36%	23%	34%
 EAST MIDLANDS TRAINS	58%	28%	23%	34%	23%	25%
 OVERGROUND	57%	41%	28%	40%	49%	32%
 GRAND CENTRAL	56%	31%	36%	63%	31%	39%
 london midland	51%	28%	22%	33%	21%	22%
 Gatwick EXPRESS	51%	45%	40%	58%	41%	58%
 TERRA	50%	43%	29%	43%	37%	29%

Southern passengers are particularly likely to have seen/heard about trains from the TV or radio, a channel that is more frequently mentioned by passengers who have heard negative information about the TOC (slide 2 of 2)

% Sources of information seen – by TOC

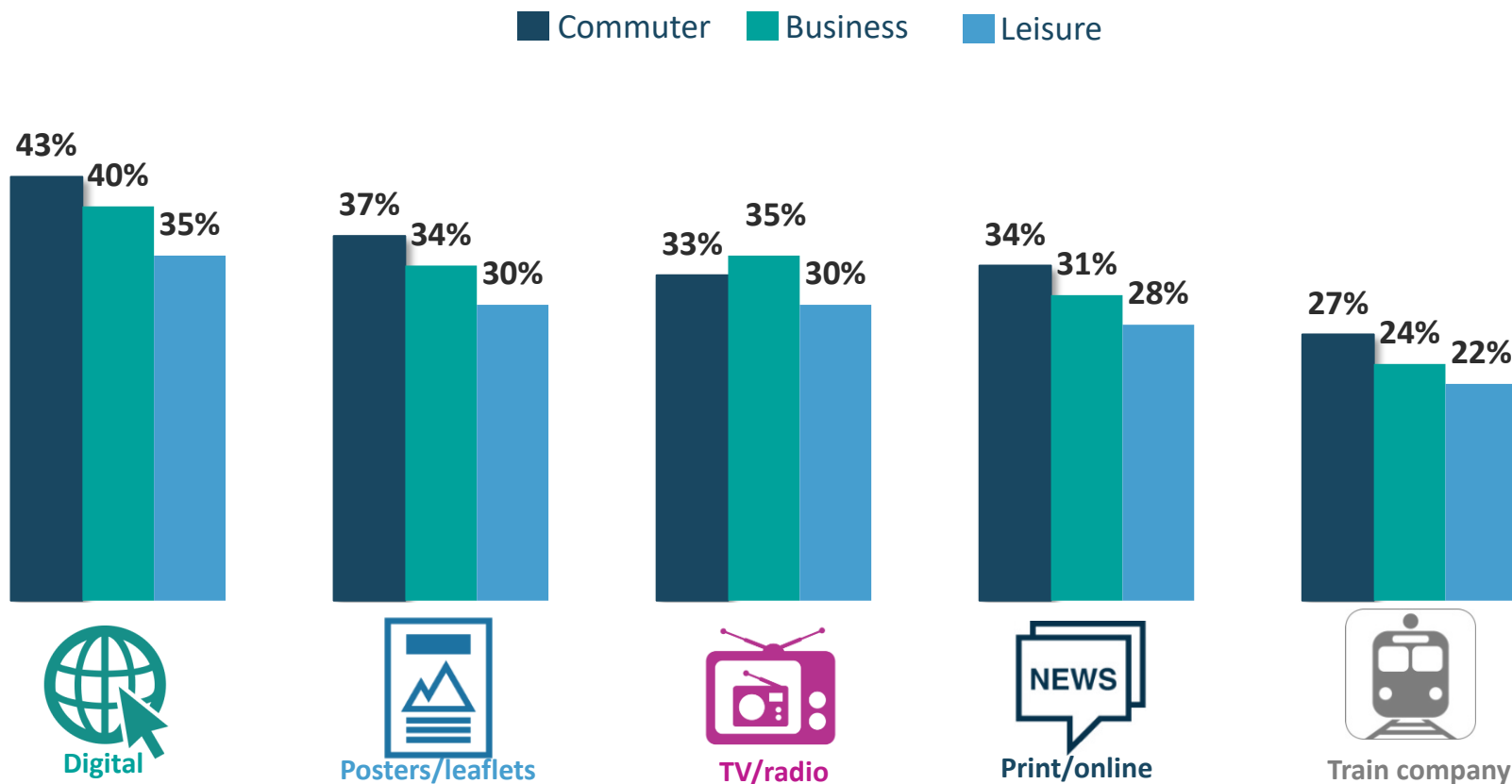
 Most used channel

Bottom 13 trusted TOCs

	Sources of information seen/heard					
	Overall Trust (6-7)	 Posters/leaflets	 Train company	 Digital	 Print/online	 TV/radio
	50%	34%	31%	41%	26%	32%
	50%	30%	27%	38%	17%	32%
	49%	26%	15%	42%	20%	25%
	48%	26%	16%	29%	17%	32%
	48%	26%	17%	29%	24%	34%
	47%	29%	19%	30%	17%	28%
	47%	31%	19%	31%	24%	28%
	47%	26%	21%	32%	22%	30%
	42%	35%	21%	32%	27%	33%
	41%	30%	21%	29%	19%	22%
	32%	33%	20%	34%	33%	32%
	31%	28%	17%	31%	35%	37%
	14%	30%	25%	43%	40%	50%

Commuters are generally more likely to have seen information across most channels, followed by business then leisure passengers, but less likely than business passengers to have seen information via TV or radio

% Sources of information seen – by most frequent journey type



E1. Where have you seen or heard anything about the railways (train services and companies) recently? (Base: 12,804; Commuters: 3,261; Business: 4,810; Leisure: 11,359)

B4. Still thinking about the train journey you make most frequently, what is the purpose of this journey? (Base: 12,804)

When giving top of mind answers about what they have seen or heard about train services recently passengers are most likely to mention industrial action and service disruption

What has been seen or heard about TOCs recently – unprompted question



Industrial action/
cancellations/delays

46%

- 30% Industrial action
- 13% Delays/disruption
- 5% Cancellations
- 3% Staff disputes
- 2% Planned maintenance



Mention of specific TOC

12%

- 9% Southern
- 2% Virgin
- <1% Merseyrail
- GWR
- East Midlands
- Scotrail



Costs/ticketing

10%

- 7% Rising train fares
- 3% Special offers
- 1% Competitive fares



Quality of service/
improvements

8%

- 7% Customer service
- 4% Maintenance/improvements
- 2% Train/station staff



Advertising

6%

- 4% Adverts (general)
- 3% Special offers

“Mainly with regard to delays and strikes on Southern Rail (and a couple of other areas up North). Locally, news with regard to improvements and/or problems with the services in my area” (Leisure, South West)

“Upgrading of East Coast Main Line for electrification HS2 Pennine tunnel, electrification of line to Hull” (Leisure, Yorkshire and the Humber)

E3. What have you seen or heard about the railways (train services and companies) recently? (Base: 8,039)

Passengers who have seen or heard negative information are more likely to be those who are aware of industrial action and service disruptions

What has been seen or heard about TOCs recently – by those who have heard positive/mixed/negative information

Seen or heard about...

Total seen/heard



Heard positive information



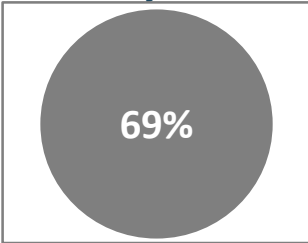
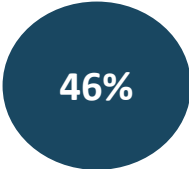
Heard mixed information



Heard negative information



Industrial action/delays



Specific TOCs



Costs/ticketing



Quality of service/improvements

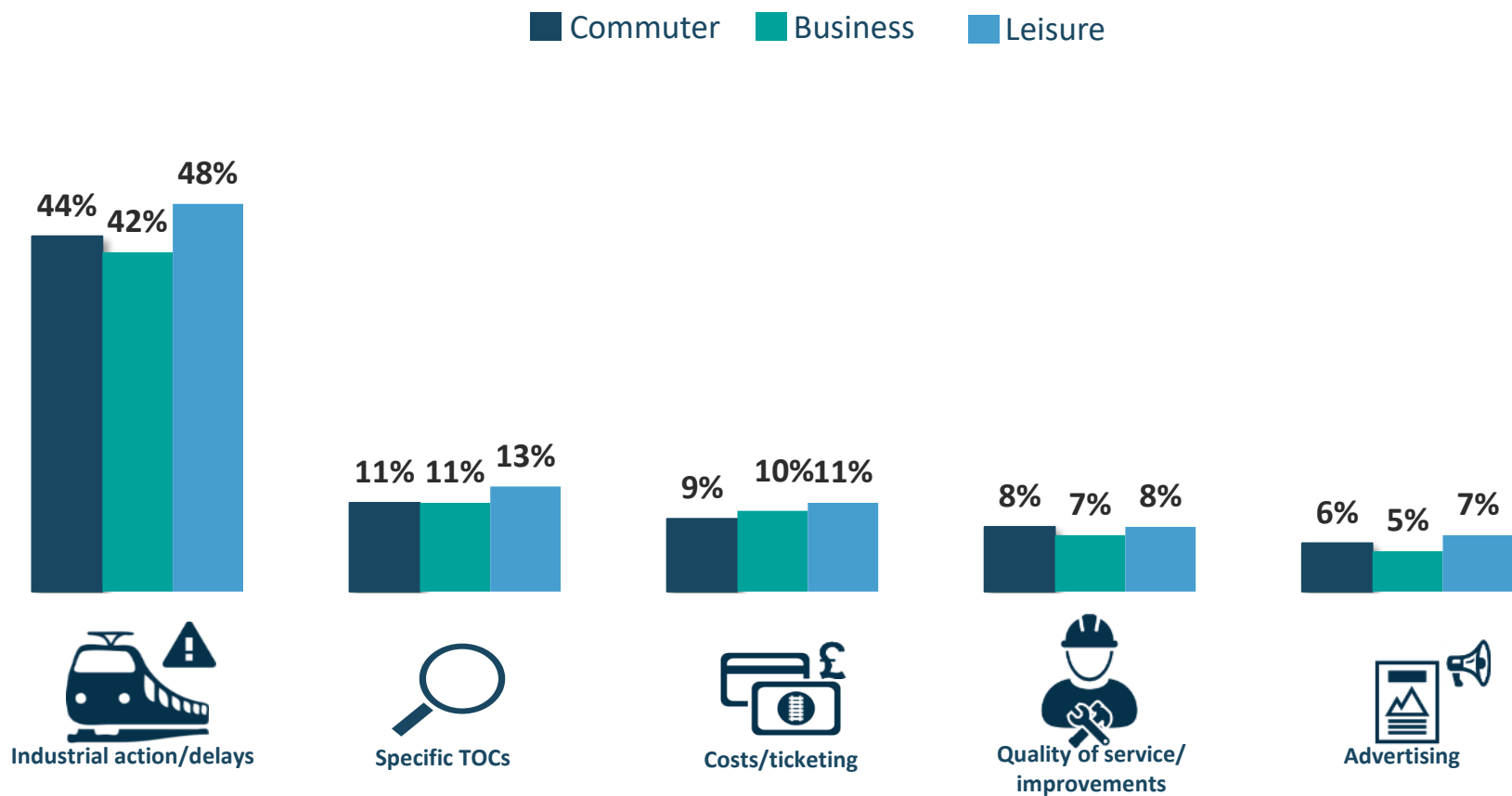


Advertising



There is little difference between journey purpose in terms of issues passengers have seen/heard about, although leisure users are most likely to be aware of industrial action and service disruption

What has been seen or heard about TOCs recently – by most frequent journey type



E1. Where have you seen or heard anything about the railways (train services and companies) recently? (Base: 12,804; Commuters: 2,468; Business: 3,573; Leisure: 7,648)

B4. Still thinking about the train journey you make most frequently, what is the purpose of this journey? (Base: 12,804)

How priorities differ in relation to trust



Summary: Passenger priorities by trust

In addition to exploring passengers' levels of trust in rail, this research also looked at passengers' improvement priorities in relation to rail journeys and stations. A separate report focuses solely on passenger priorities however this next section outlines how priorities differ in relation to levels of trust in rail

Using an open question, passengers were asked to specify how train companies could improve the experience of rail travel. The following summary details passengers' responses by their level of trust:

- As might be expected, in terms of journey improvements, passengers who have lower levels of trust (do not trust or are neutral) are more likely to mention several improvement priorities
- Passengers who have lower levels of trust are more likely to suggest punctuality/reliability, value for money and less frequent strikes or industrial action as improvement priorities than those who do trust the rail industry

Passengers were provided with a list of station facilities and asked to select which facilities need to be improved at the station most often travelled from. The following outlines the findings when looking at passenger responses by trust:

- A variety of station improvements were selected by passengers who are either neutral or do not trust the rail industry
- Although passengers who do trust the rail industry selected similar station improvements to passengers as a whole, this group are more likely to state that nothing needs to be improved than passengers who have lower trust levels

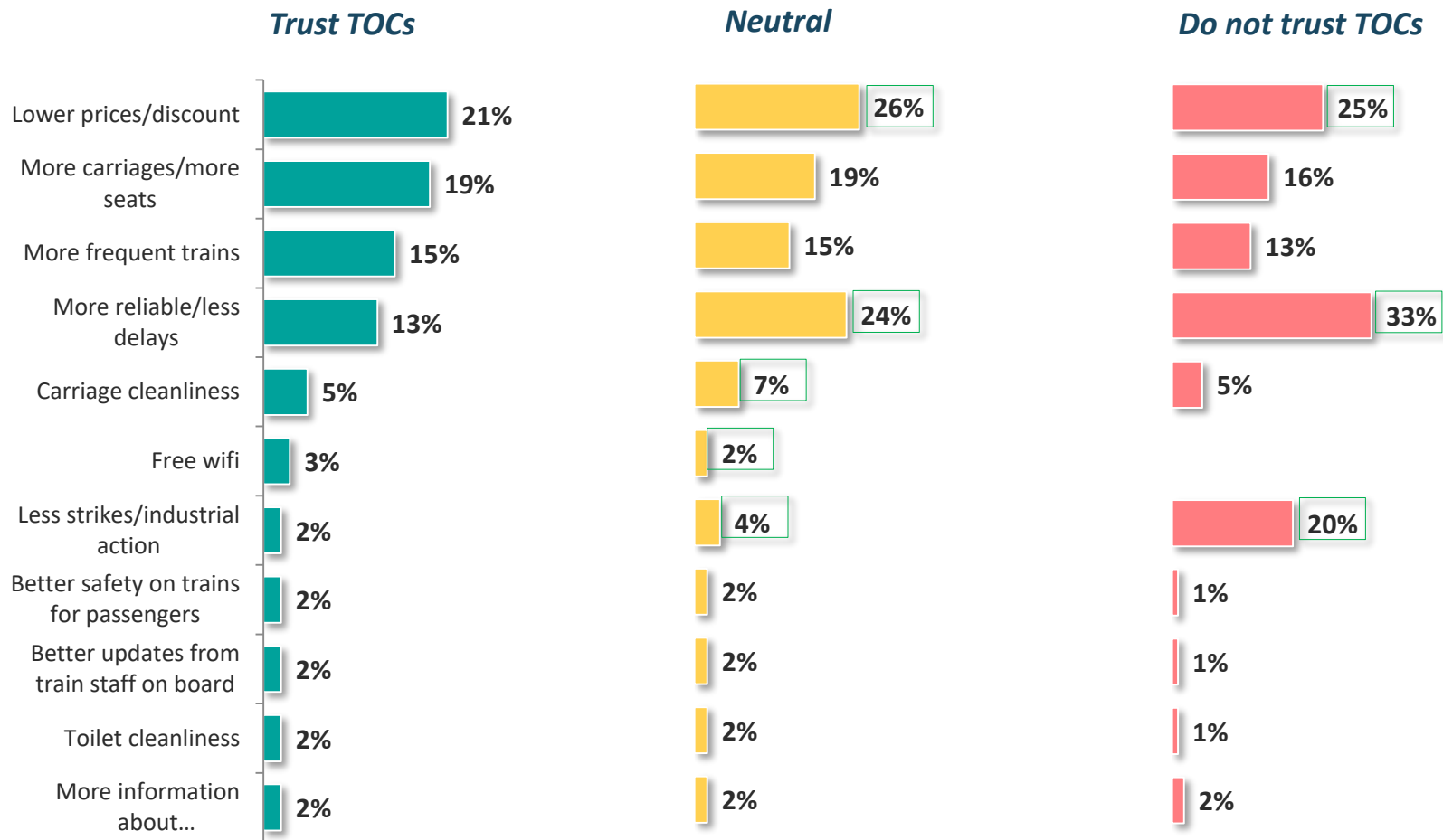
A final question looked at attitudes towards public transport by level of trust in rail. Passengers were asked to rate how much they agree or disagree with a list of statements relating to public transport in general:

- Passengers who trust the rail industry are generally more positive about public transport than passengers who do not trust rail
- Passengers who do not trust the rail industry are more likely to state that using public transport is stressful and that they would prefer to drive

Passengers who do not trust TOCs are significantly more likely to mention a number of the improvement priorities than those who do trust TOCs

% Passenger improvement priorities by level of trust in TOCs (unprompted responses)

 = Significantly higher

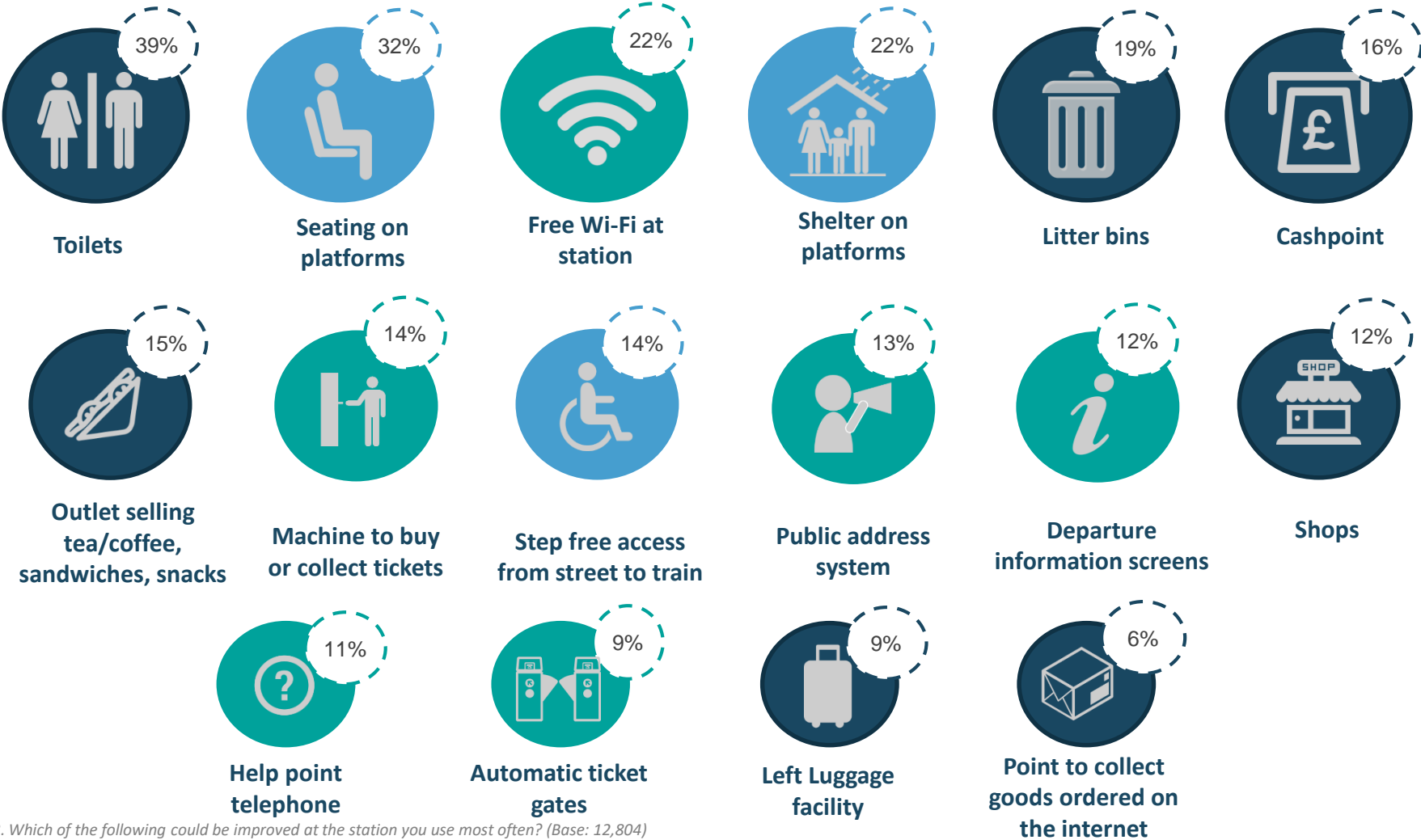


C1. Overall, how do you think that train companies could improve the experience of all rail travel for you? (Base: 12,804; Trust TOCs: 6,448; Neutral: 5,928; Don't trust: 940)

At the overall level passengers' priorities for station improvements centre on basic station amenities, though free Wi-Fi is also one of the top priorities

% Priorities for improving station facilities

● Ticketing and Information
 ● Platform access and facilities
 ● Station facilities

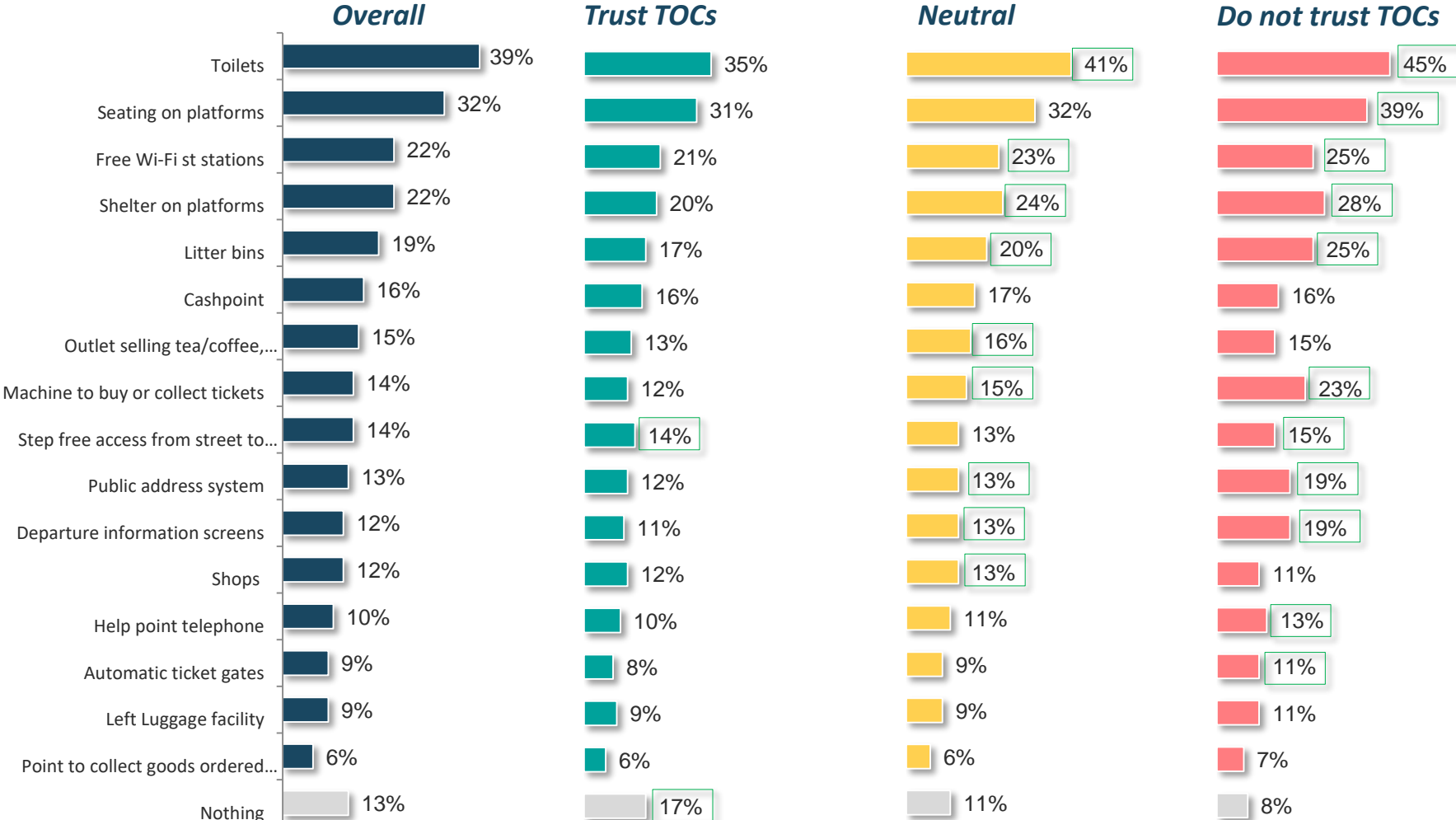


C3. Which of the following could be improved at the station you use most often? (Base: 12,804)

Passengers who do not trust TOCs are significantly more likely to mention many of the station improvement priorities than those who do trust TOCs

% Priorities for improving station facilities

 = Significantly higher

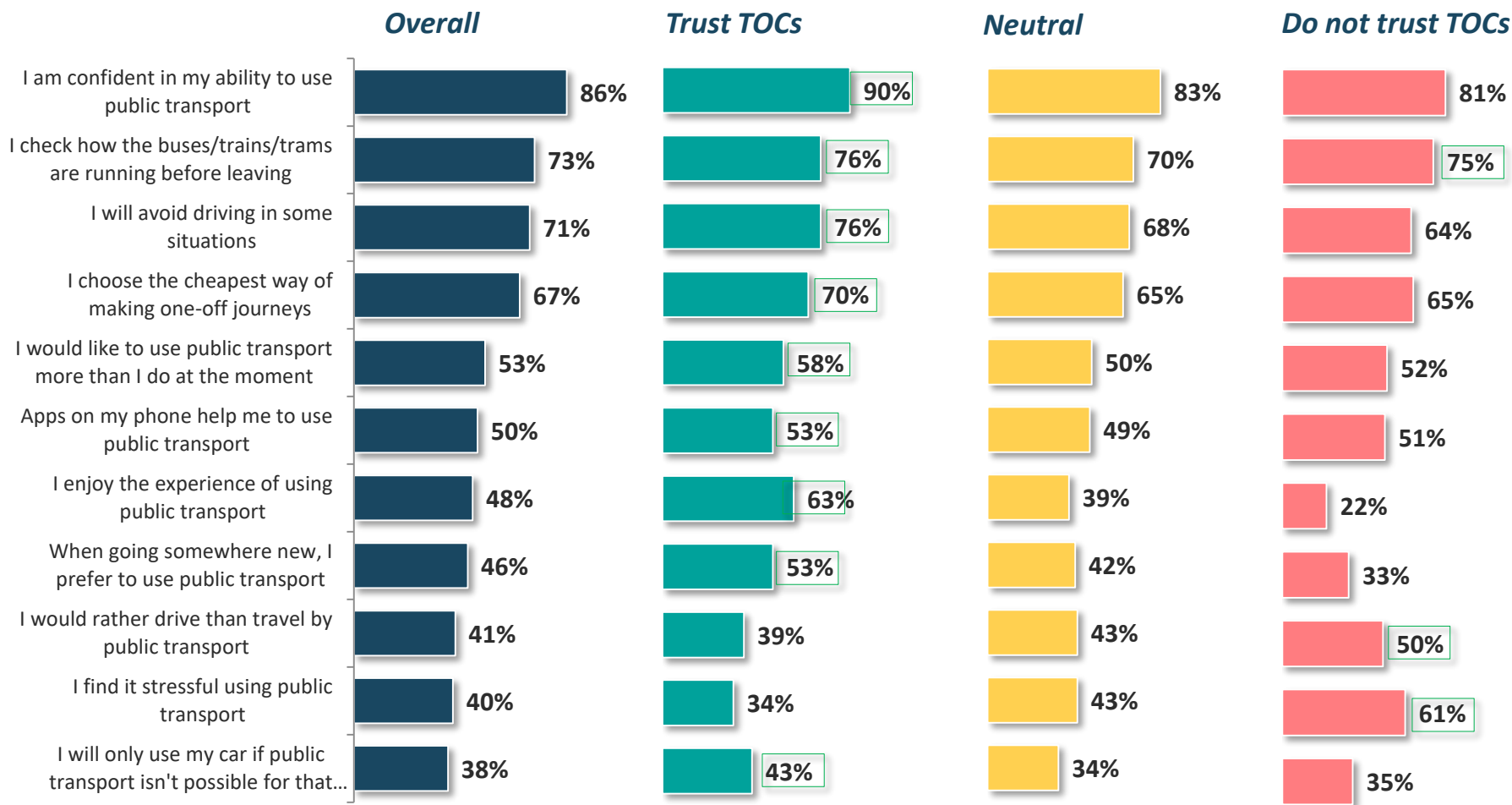


C3. Which of the following could be improved at the station you use most often? (Base: 12,804; Trust TOCs: 6,448; Neutral: 5,928; Don't trust: 940)

Passengers who trust TOCs are more likely to be more engaged with and happy about the experience of using public transport. Those lacking trust are more likely to prefer other forms of transport and find public transport stressful.

% Agreement with statements relating to public transport

 = Significantly higher



QF4. Now thinking about public transport in general, how much do you agree or disagree with the following statements? (Base: 12,804; Trust TOCs: 6,448; Neutral: 5,928; Don't trust: 940)



Appendix – Summary of weighting approach

Summary of weighting approach

In this research panel data was used with applied quotas. While quotas ensured that sample proportions reached expectations, weighting was also applied to establish a truly representative sample. An explanation of our approach to weighting is outlined below:

- Targets for the Journey Weighting were derived from the full NRPS data for 2016
- The target population was defined as journeys for those who travel at least once every three months
- Fully interlocking targets were set for journey purpose (commuter, business, leisure), age band (16-34, 35-54, 55+) and gender (male, female) within each of the 27 TOCs
- Cells on a handful of smaller TOCs with sparse data were combined to eliminate empty cells and reduce very heavy weights
- Finally a balancing weight was applied to ensure the correct distribution of TOCs by journey
- The weighting scheme takes advantage of the large sample size to ensure weights are extremely accurate and generate a broadly representative sample (by journey) within each TOC and overall

Sample sizes prior to weighting

Sample type	Sample size
Region	
North East	584
North West	1,503
Yorkshire and the Humber	1,209
East Midlands	933
West Midlands	1,204
East of England	1,274
London/Greater London	2,401
South East	2,225
South West	1,058
Wales	956
Scotland	1,467

Sample type	Sample size
Age	
16-25	1,708
26-44	5,011
45-64	5,413
65+	2,682

Sample type	Sample size
Gender	
Male	7,066
Female	7,727

Sample sizes prior to weighting

Sample type	Sample size
TOC – London and South East	
c2c	491
Chiltern Railways	634
Great Northern	468
Great Western Railway	1,199
Greater Anglia	744
London Midland	911
London Overground	717
South West Trains	895
South Eastern	820
Southern	999
TfL Rail	455
Thameslink	703

Sample type	Sample size
TOC – Long Distance	
CrossCountry	791
East Midlands Trains	858
Transpennine Express	687
Virgin Trains West Coast	1,105
Virgin Trains (East Coast)	1,378

Sample type	Sample size
TOC – Airport	
Gatwick Express	415
Heathrow Express	225
Heathrow Connect	202
Stansted Express	230

Sample type	Sample size
TOC – Regional	
Arriva Trains Wales	1,147
Northern	1,110
Merseyrail	437
ScotRail	1,217

Sample type	Sample size
TOC – Open Access	
Hull Trains	260
Grand Central	380