

Rail Passenger Trust Survey

Final Report

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Objectives of the research

To establish a benchmark measure to help understand the public's trust/confidence in the railways, to complement existing customer satisfaction research

- To determine the viability of a **benchmark measure of rail passengers' perceptions** of the railways in Great Britain
- To **permit comparison** by TOC franchise, sector, nation/region, journey purpose and potentially ticket type
- To **determine key factors driving both satisfaction and dissatisfaction** along with both rational and emotional reactions
- To be **replicable, and potentially scalable**, for the future
- To quantify the extent to which passengers **know and identify with** a specific TOC
- To determine the influence on passenger perceptions of their **own journey experiences, media stories and word of mouth**
- To **compare perceptions** of rail with other transport modes, utilities and other public services

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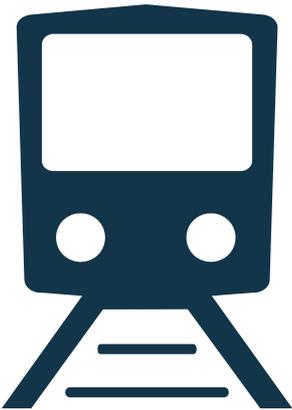
The Rail Passenger Trust Survey aims to understand customer relationships with TOCs, specifically looking at how to generate trust



National Rail Passenger Survey (NRPS)

The National Rail Passenger Survey (NRPS) provides a network-wide picture of customers' satisfaction with rail travel

The focus is on key passenger touchpoints that provide important information on Train Operating Companies' functional performance





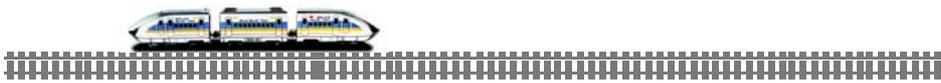
Rail Passenger Trust Survey (RPTS)

The Rail Passenger Trust survey looks more closely at the relationship between Train Operating Companies and consumers

The focus is on relationship measures that provide important information on how to improve brand and industry perceptions

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Performance on key measures



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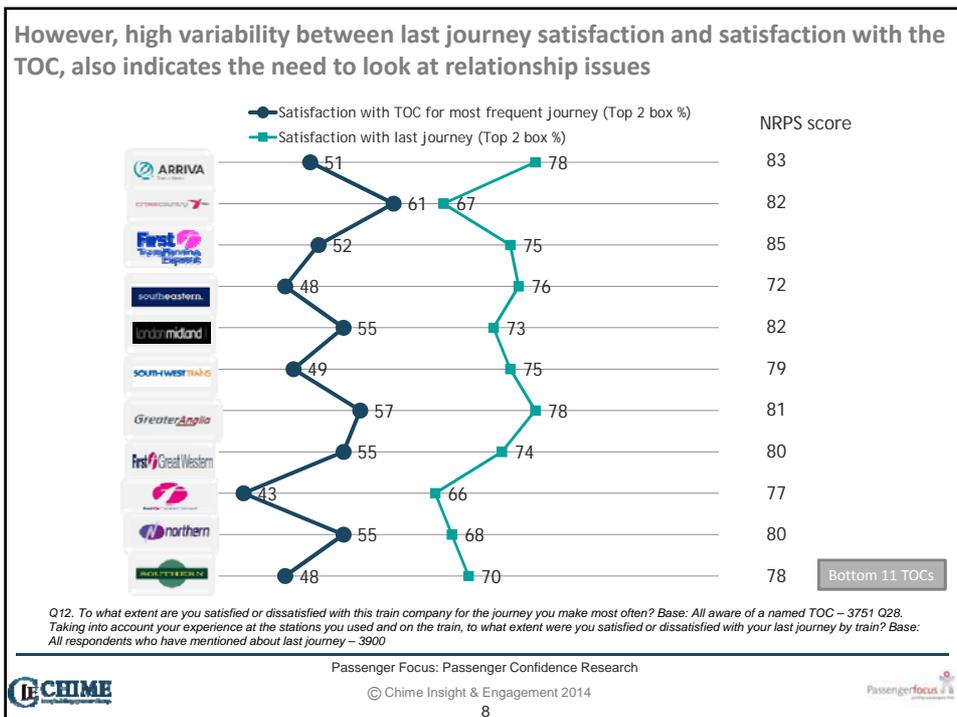
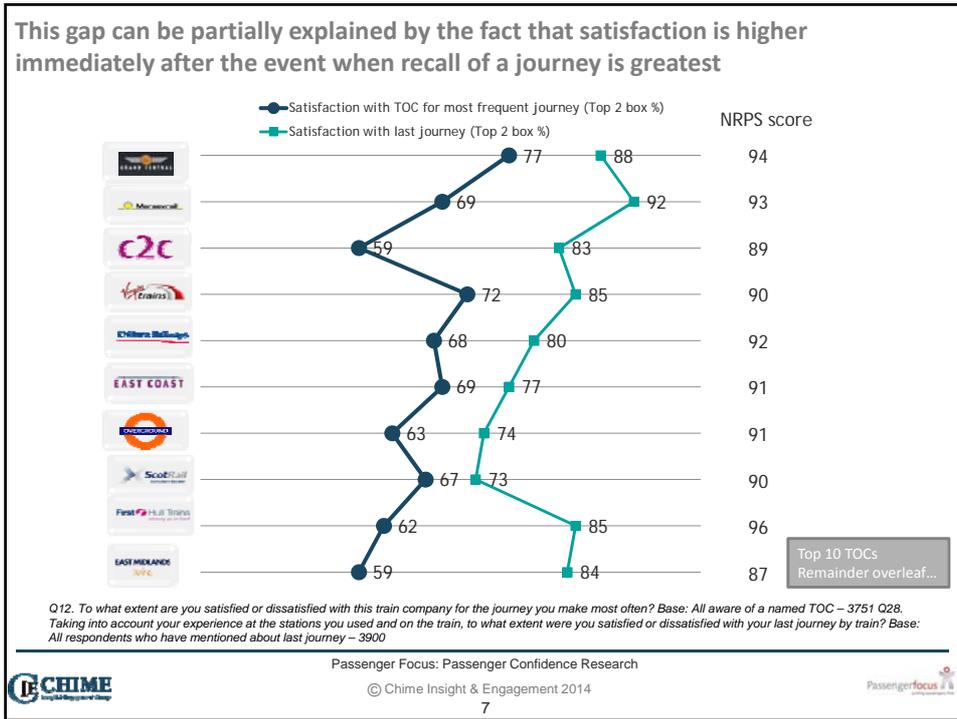
Satisfaction with the last journey experience tends to be higher than satisfaction with the Train Operating Company (TOC)

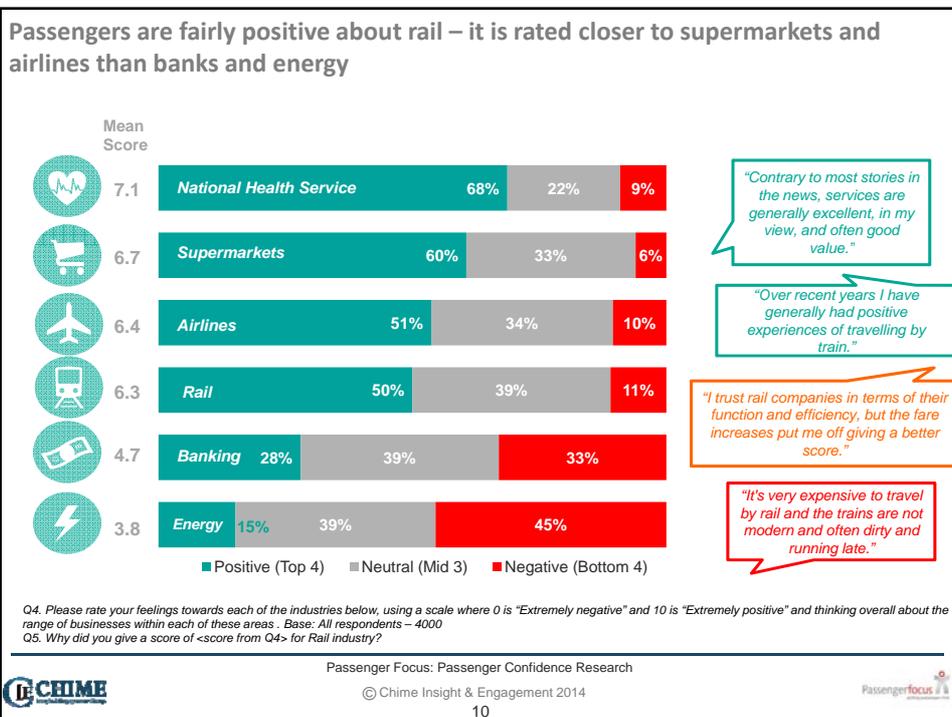
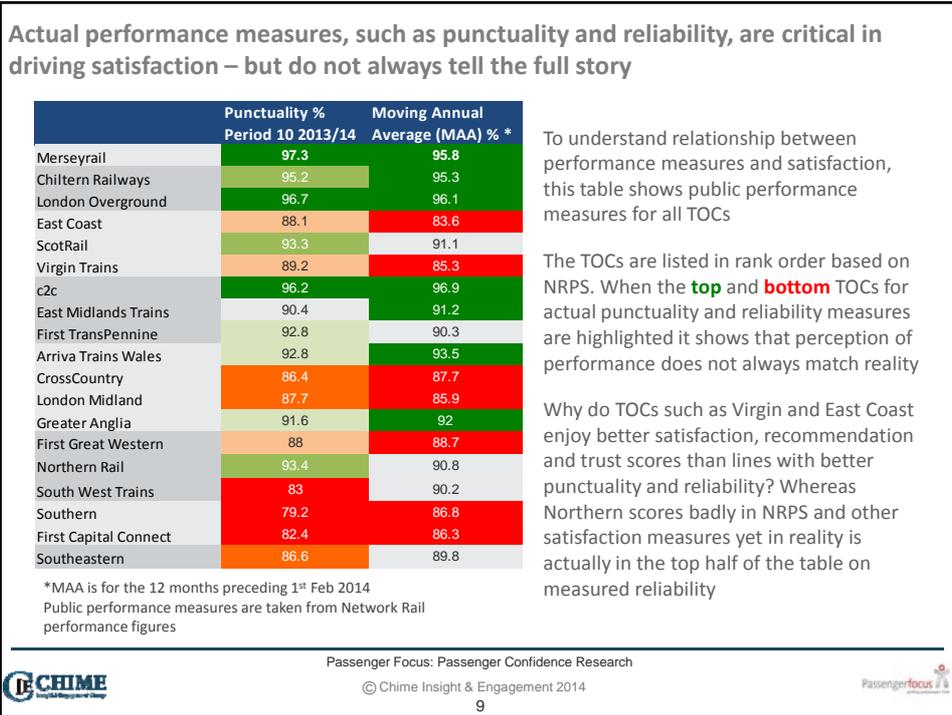
National Rail Passenger Survey	
Satisfaction with last journey Spring 2014 (conducted straight after journey)	72% ↔ 96%
Rail Passenger Trust Survey	
Satisfaction with last journey Jan 2014	66% ↔ 92%
Satisfaction with TOC for most frequent journey Jan 2014	43% ↔ 77%
Trust Jan 2014	49% ↔ 80%

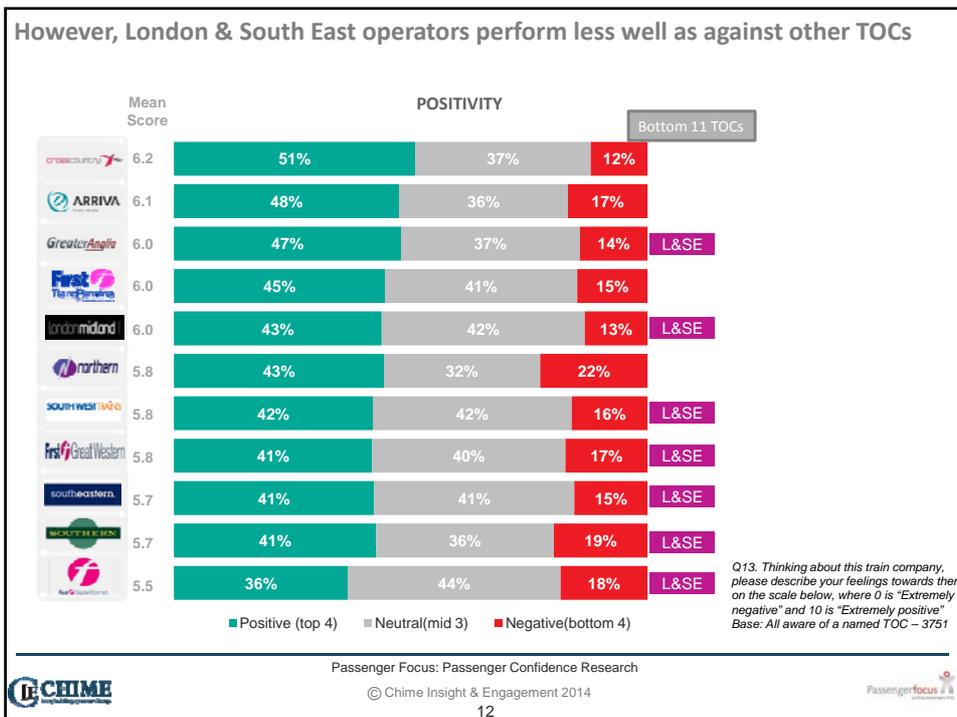
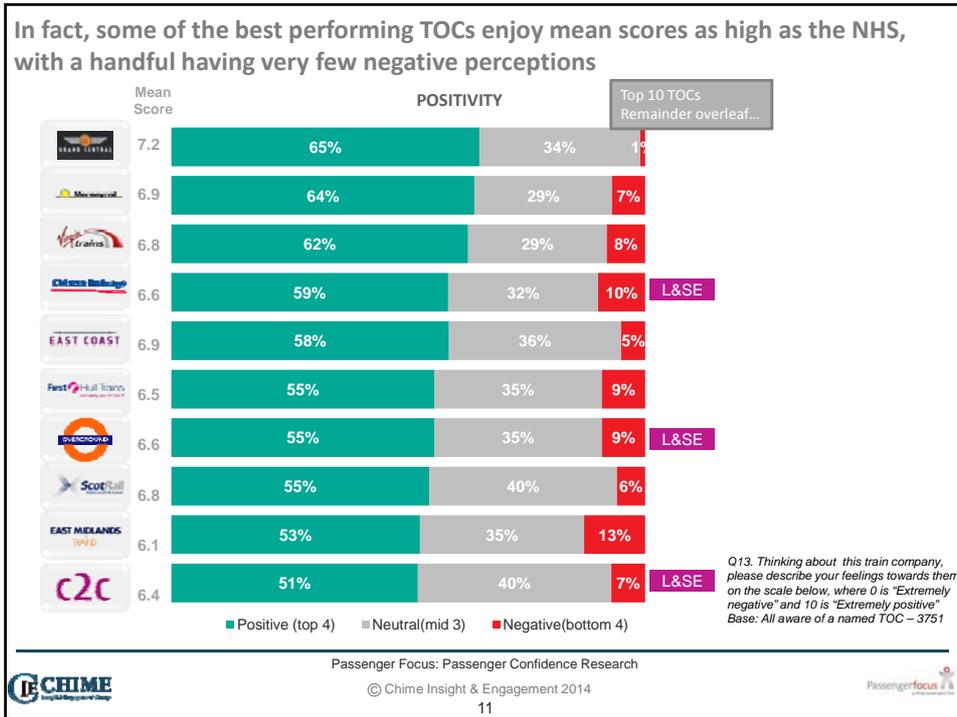
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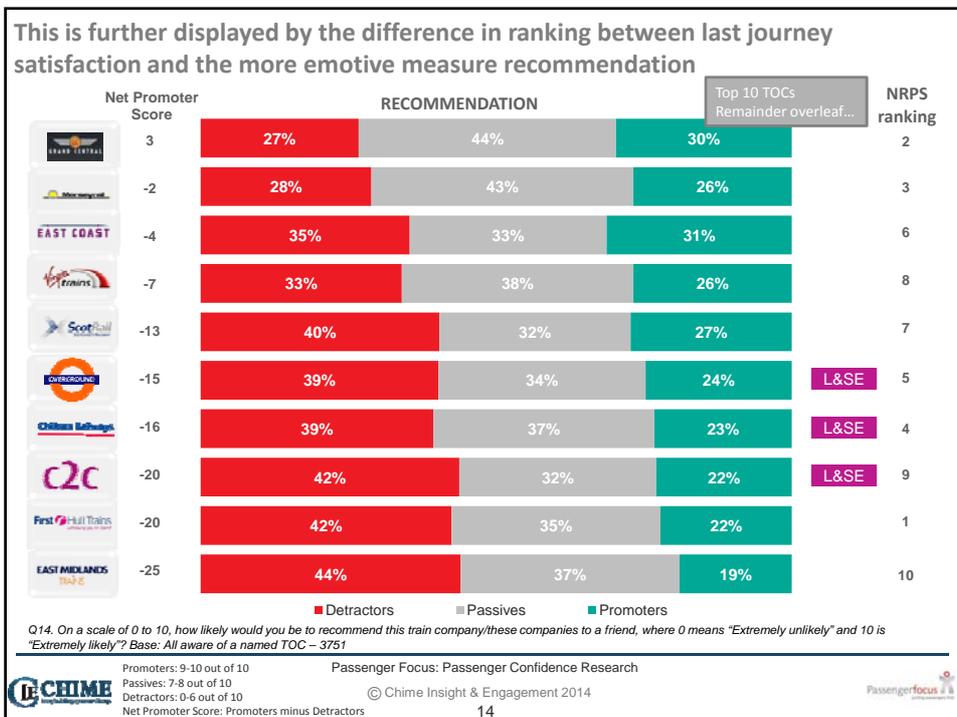
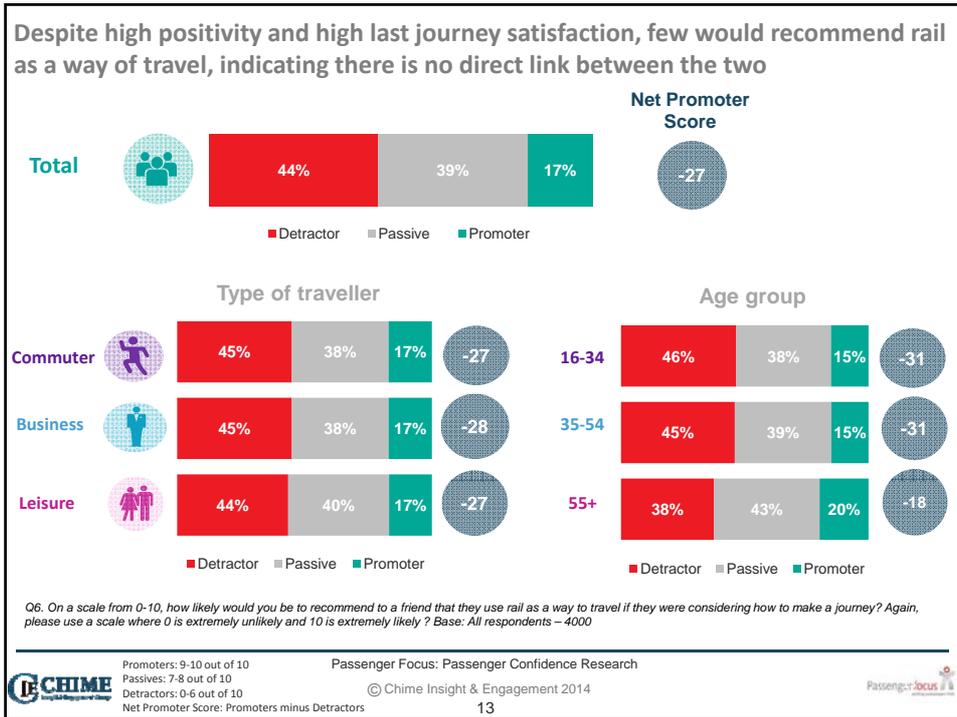


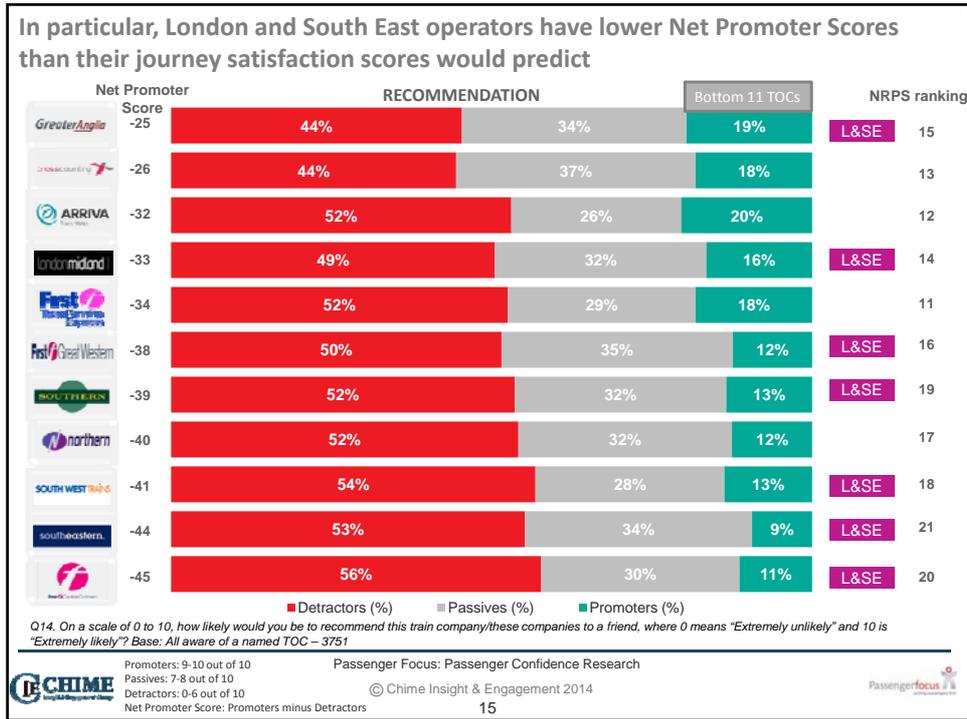

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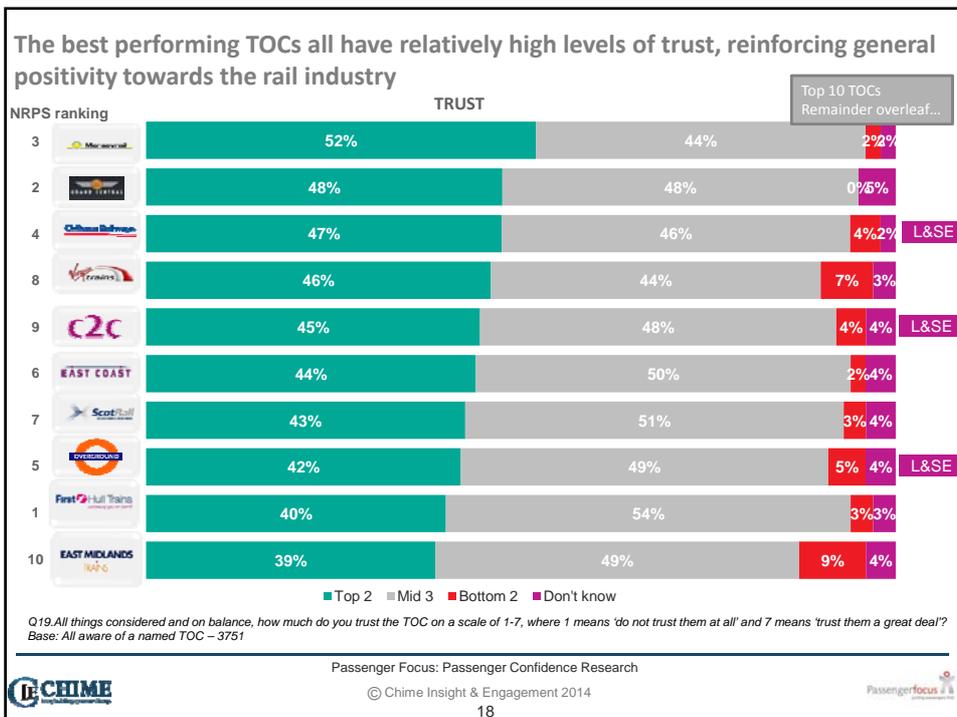
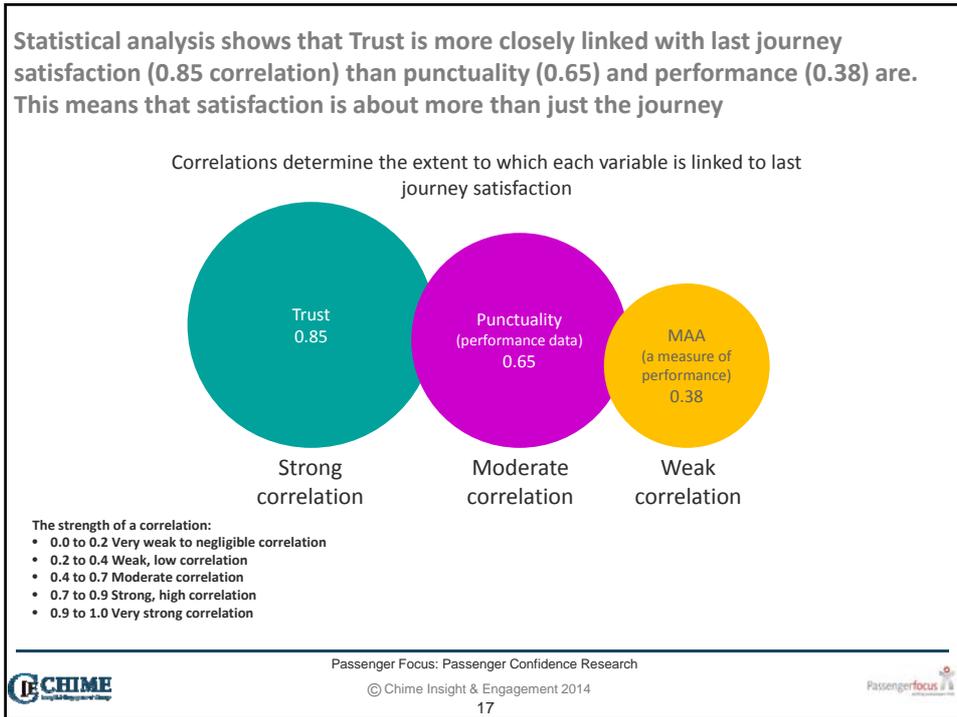


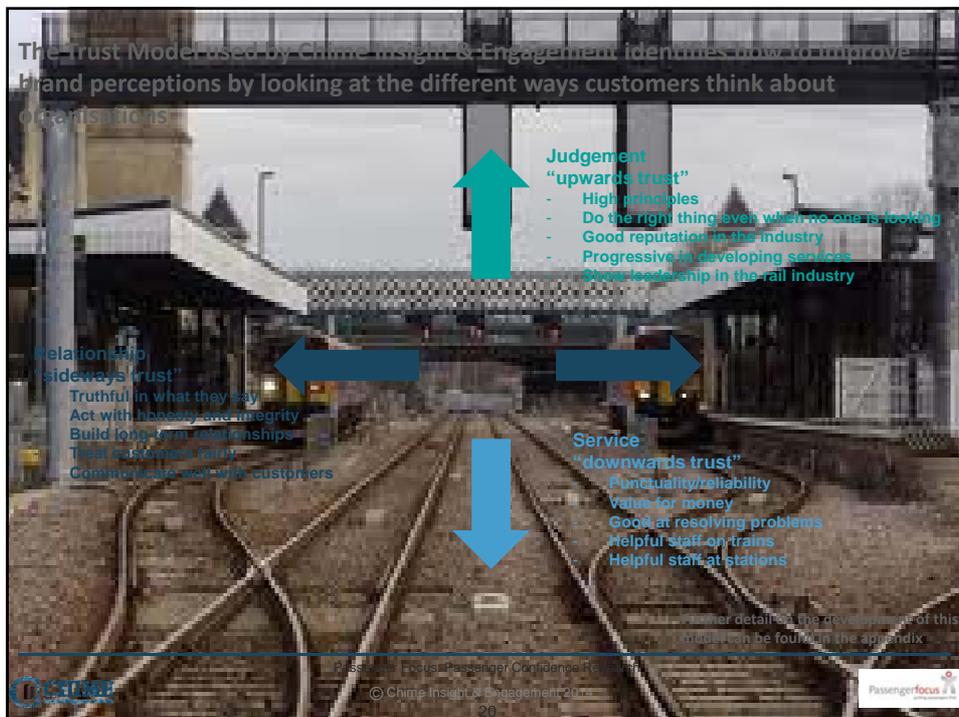
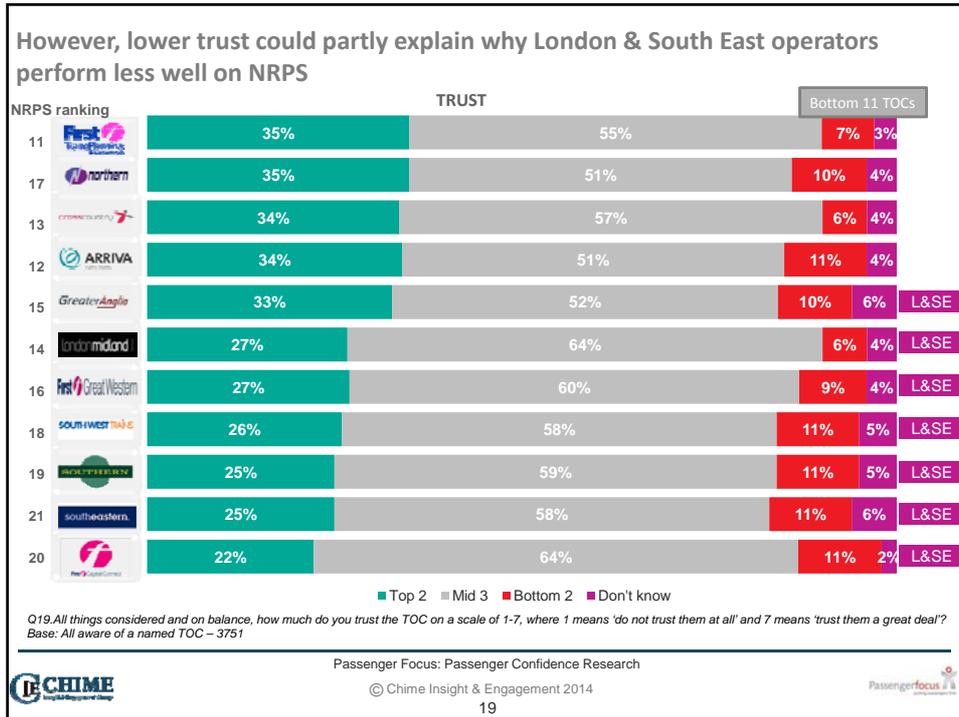
Understanding brand perceptions

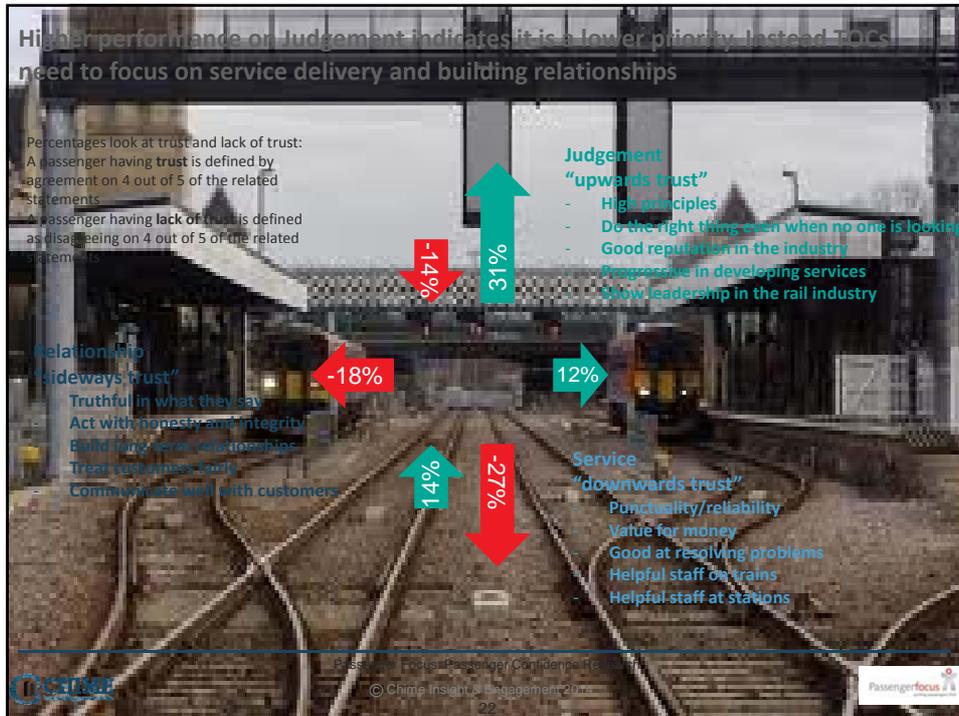
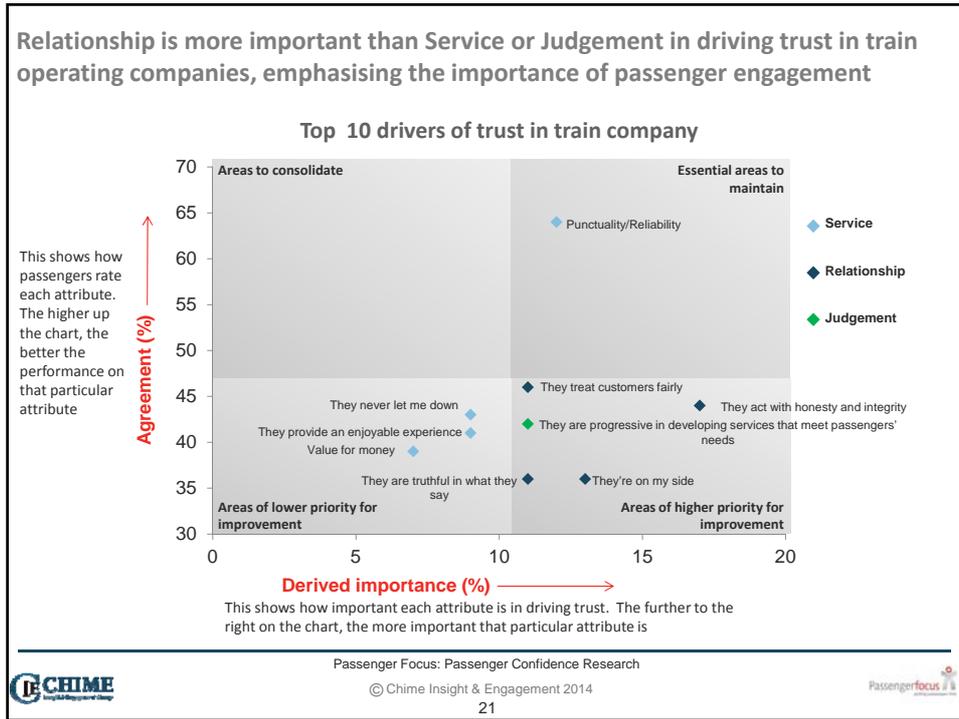


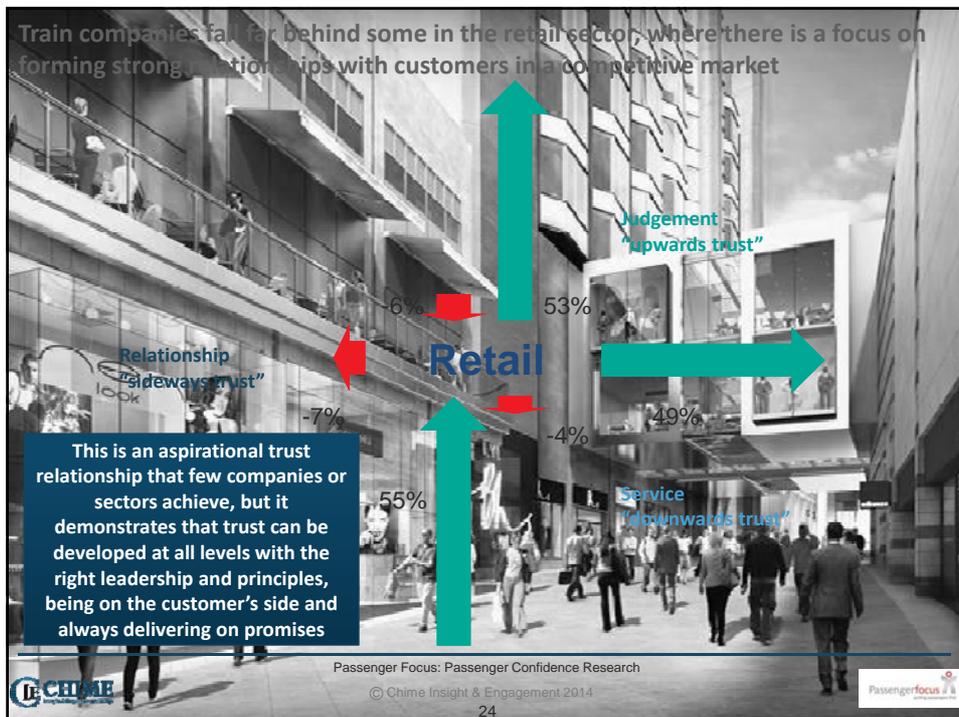
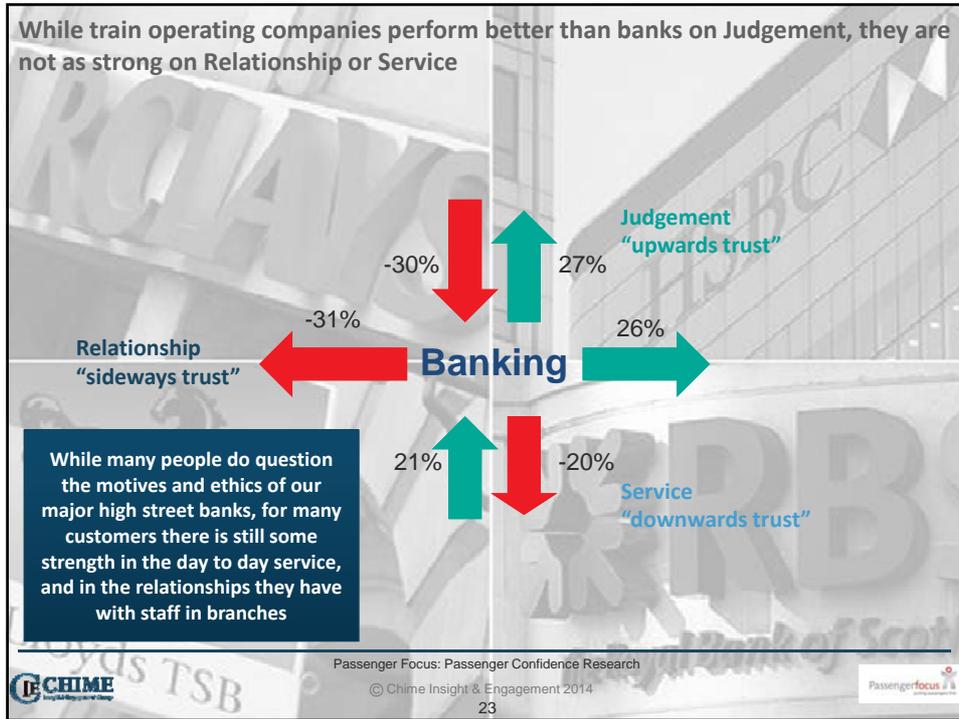
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Trust in Service



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Service trust for train operators covers functional measures relating to day-to-day service delivery

Judgement
"upwards trust"

Relationship
"sideways trust"

Service
"downwards trust"

- Punctuality/reliability
- Value for money
- Good at resolving problems
- Helpful staff on trains
- Helpful staff at stations

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These functional measures are sometimes referred to as 'dissatisfiers' (hygiene factors) as they drive dissatisfaction if they go wrong. Trust in adequate service delivery needs to be created before customers will use a train service

Pyramid of Customer needs

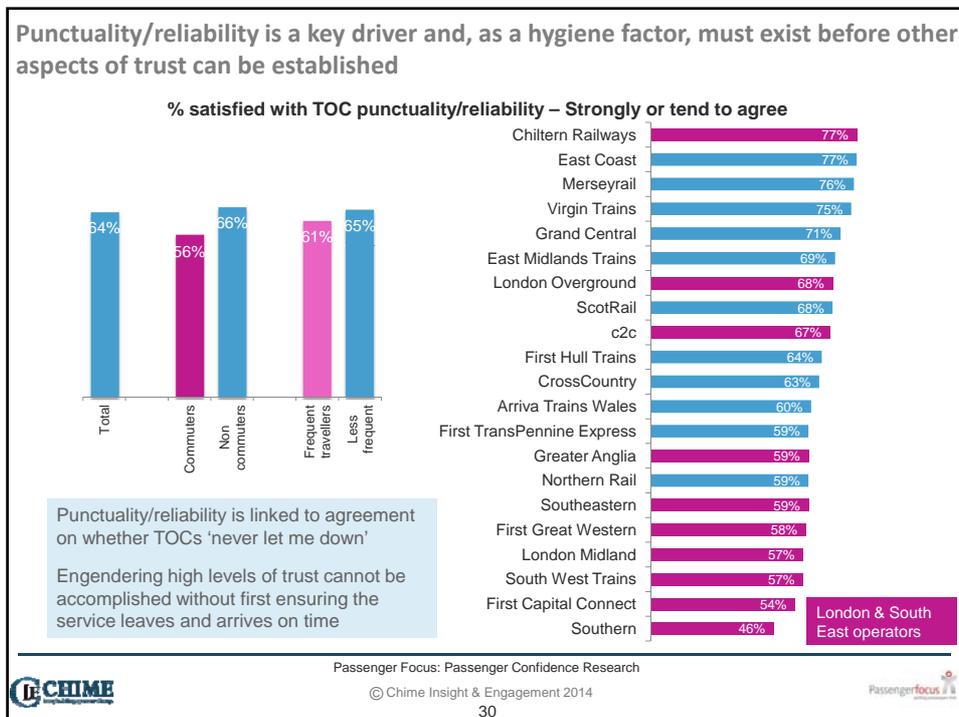
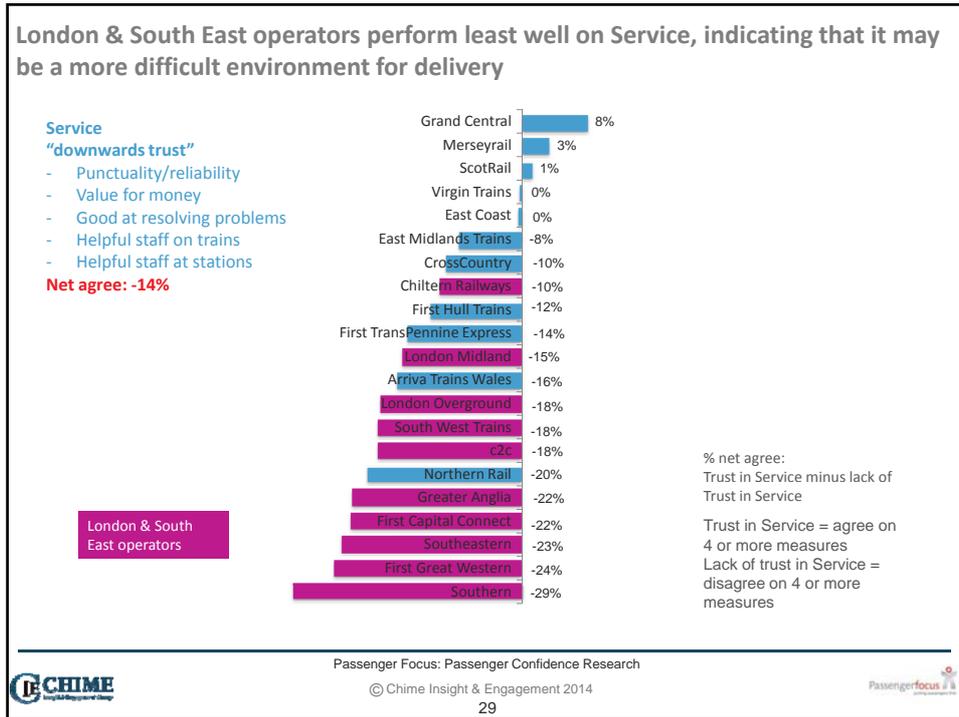
Service focusses on service delivery and therefore is at the bottom of the pyramid of customer needs developed by Van Hagen & Sauren for the rail industry

Van Hagen, M. & Sauren, J. (2013) *Influencing the train experience: using a successful measurement instrument*, Netherlands Railways

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However, service is the lowest performing out of the three aspects of trust. This indicates that performance still needs to be a priority for TOCs

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Punctuality/reliability is particularly important on commuter routes as customers are reliant on train companies to get them to work on a daily basis

RELIABILITY FOR COMMUTERS

Commuter routes have to keep passengers satisfied with impeccable reliability that they can trust

On leisure journeys, being 5-10 minutes late may be acceptable; indications are that commuters may be more sensitive

➔

TRUST

Trust for train companies will come from trust in reliability of commuter journeys

"As you cannot trust them. Trains are never on time and cancelled very often."



"Because they are a trustworthy rail network and only rarely let you down."

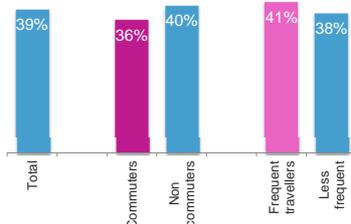


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Value for money is also a key driver. Commuters are generally less satisfied than non-commuters, probably because of the need to travel at peak times

% satisfied with TOC value for money – Strongly or tend to agree



Category	Commuters	Non-commuters
Total	39%	40%
Commuters	36%	-
Non-commuters	-	40%
Frequent travellers	41%	-
Less frequent	-	38%

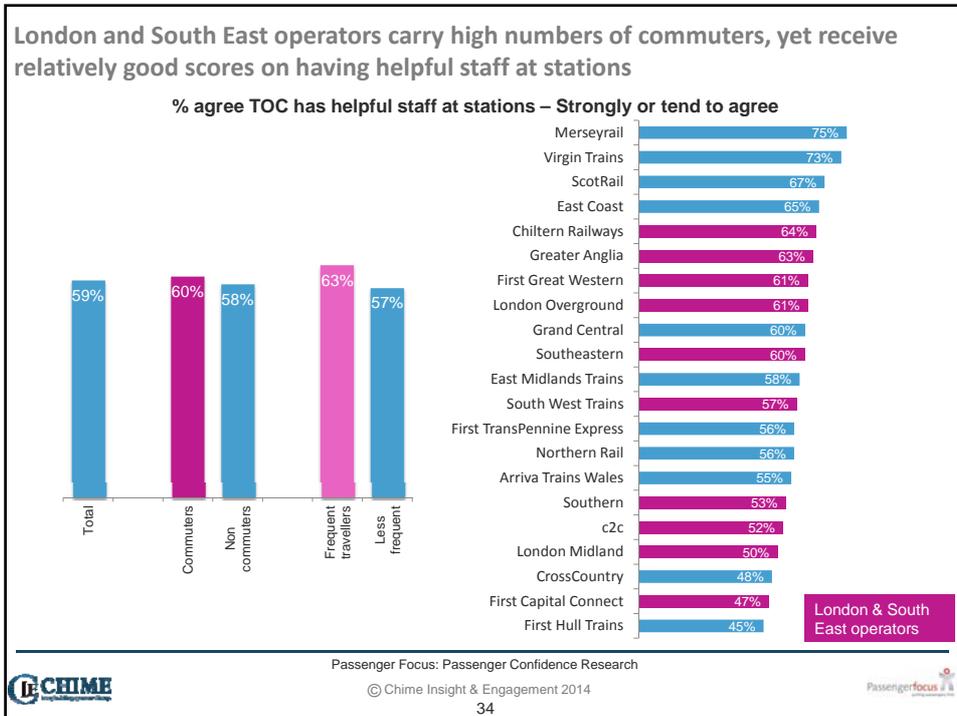
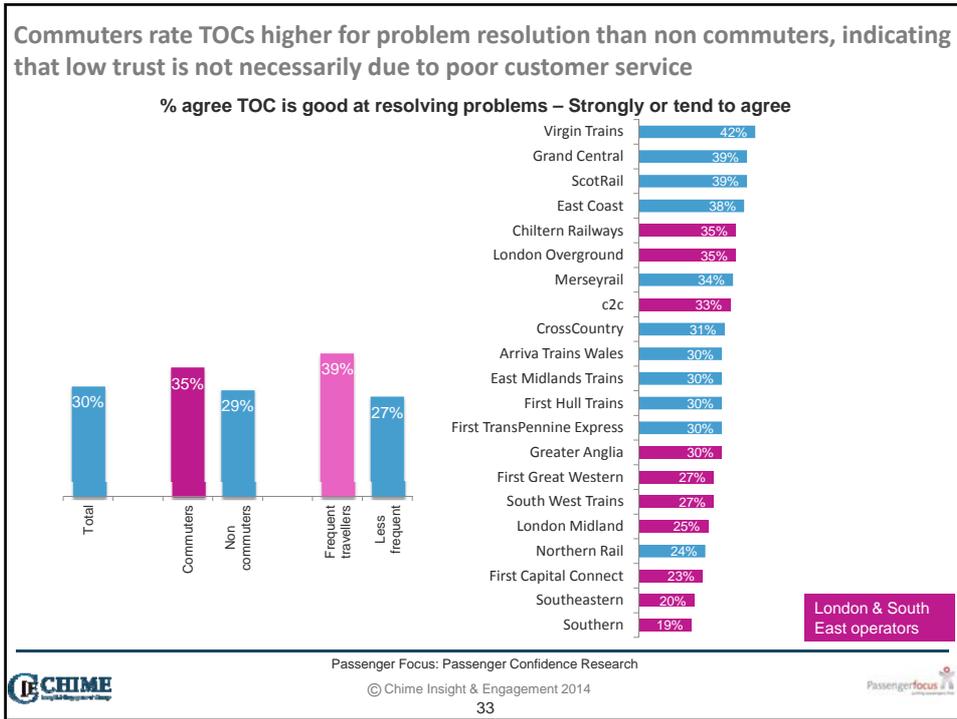
TOC	% Satisfied
Grand Central	68%
Merseyrail	54%
First Hull Trains	51%
East Coast	51%
London Midland	47%
ScotRail	46%
Virgin Trains	46%
London Overground	44%
Chiltern Railways	42%
Arriva Trains Wales	40%
Northern Rail	40%
CrossCountry	37%
East Midlands Trains	37%
First TransPennine Express	36%
c2c	34%
Greater Anglia	34%
First Capital Connect	32%
First Great Western	30%
Southern	27%
Southeastern	25%
South West Trains	21%

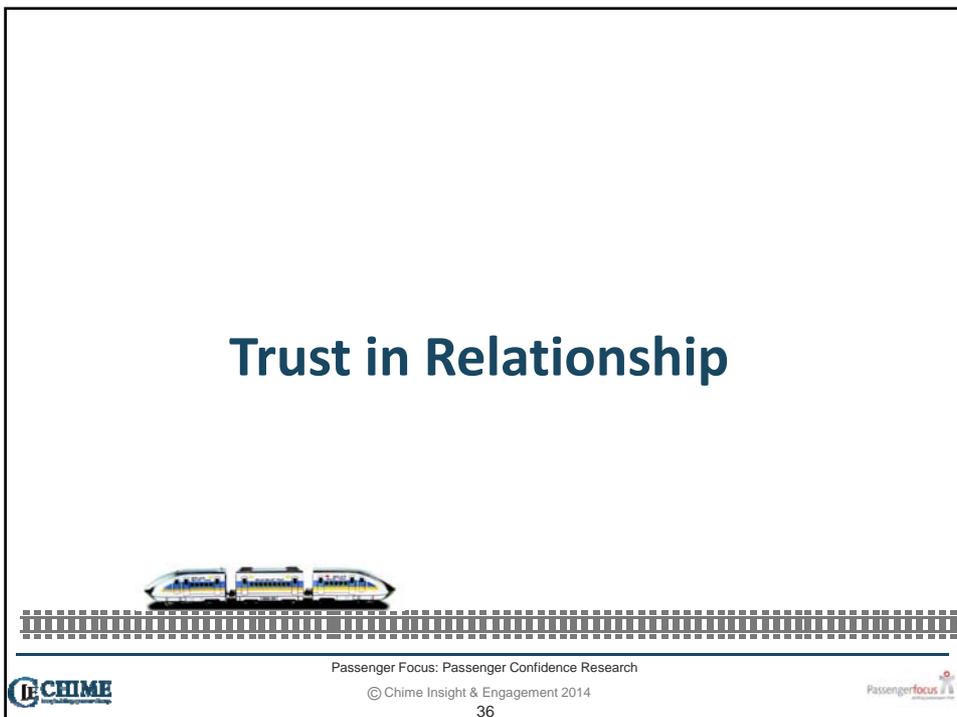
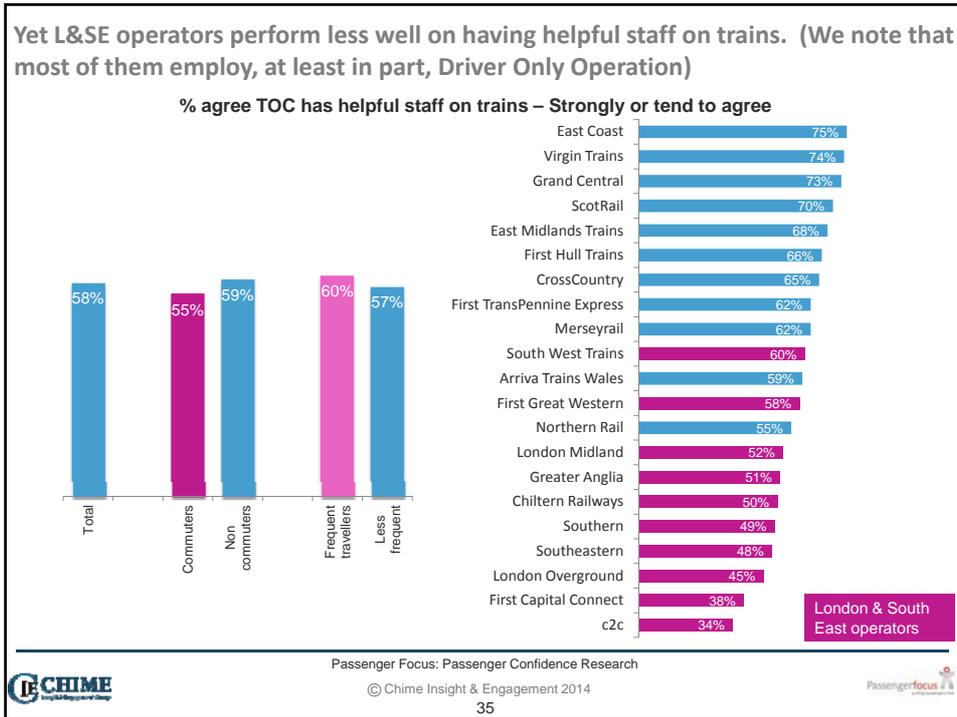
London & South East operators

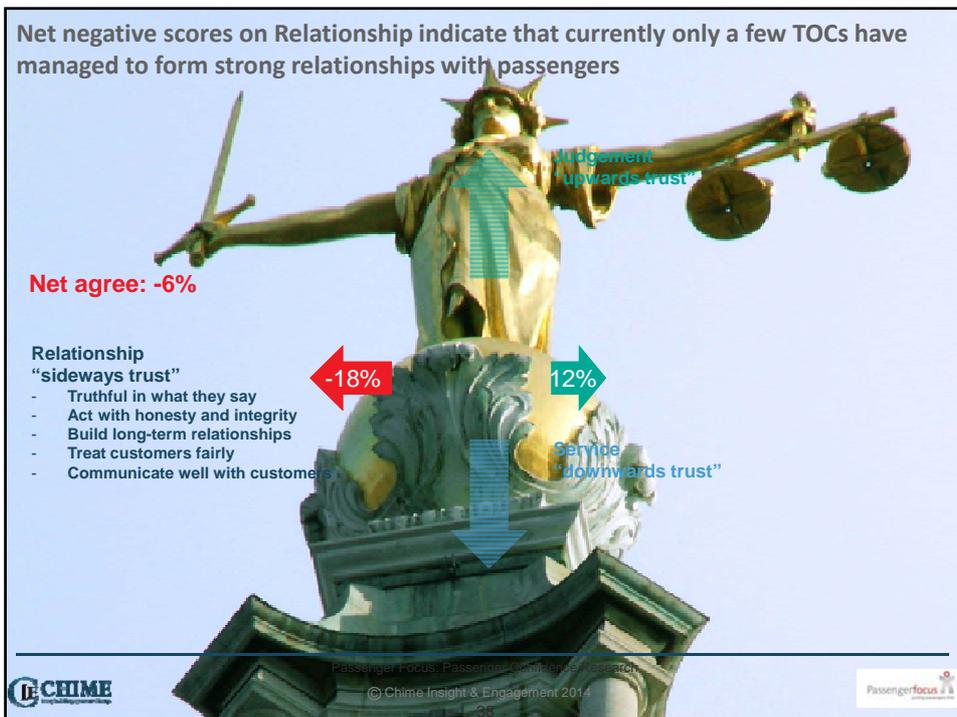
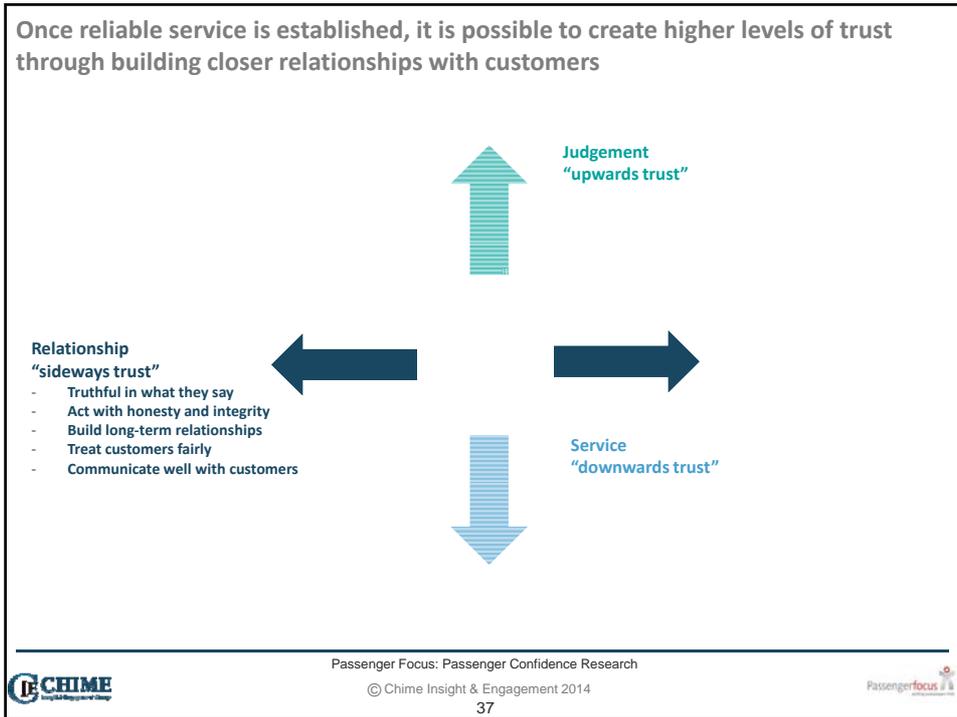


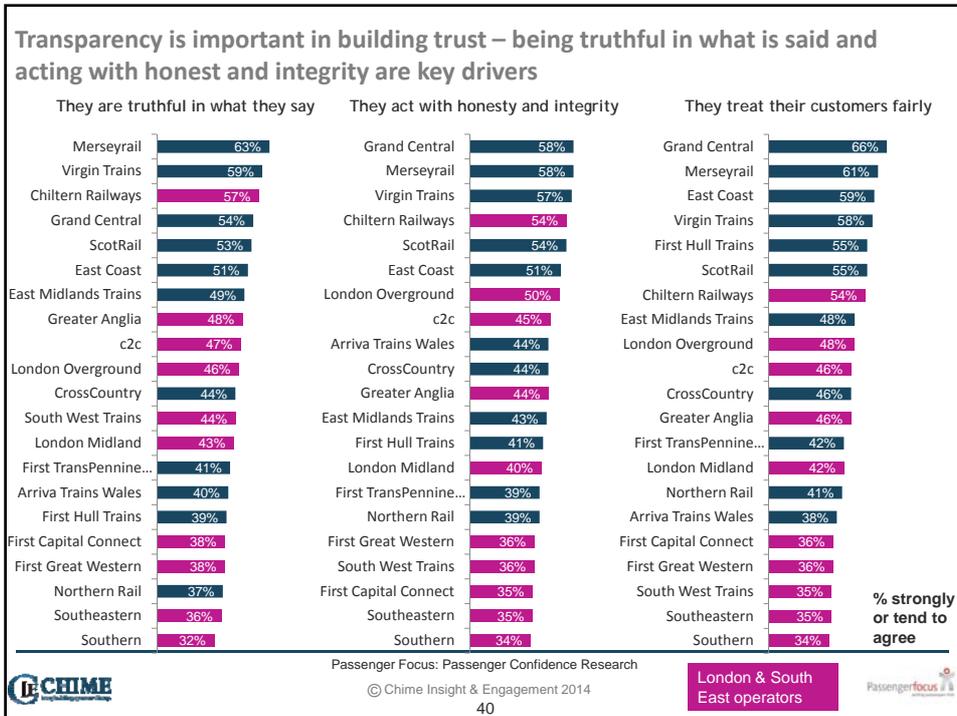
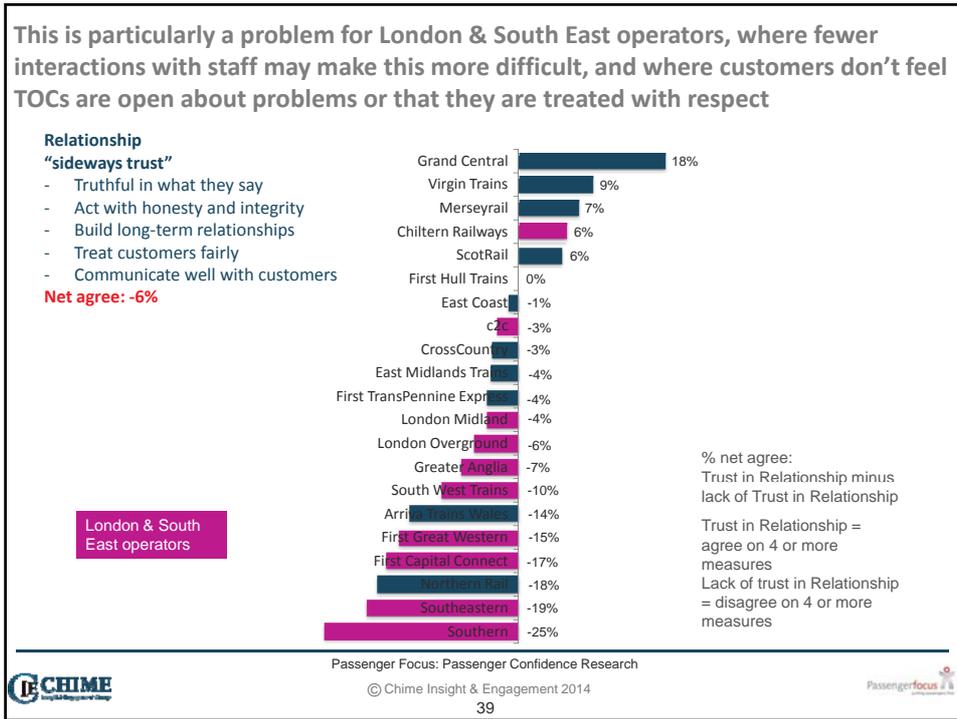
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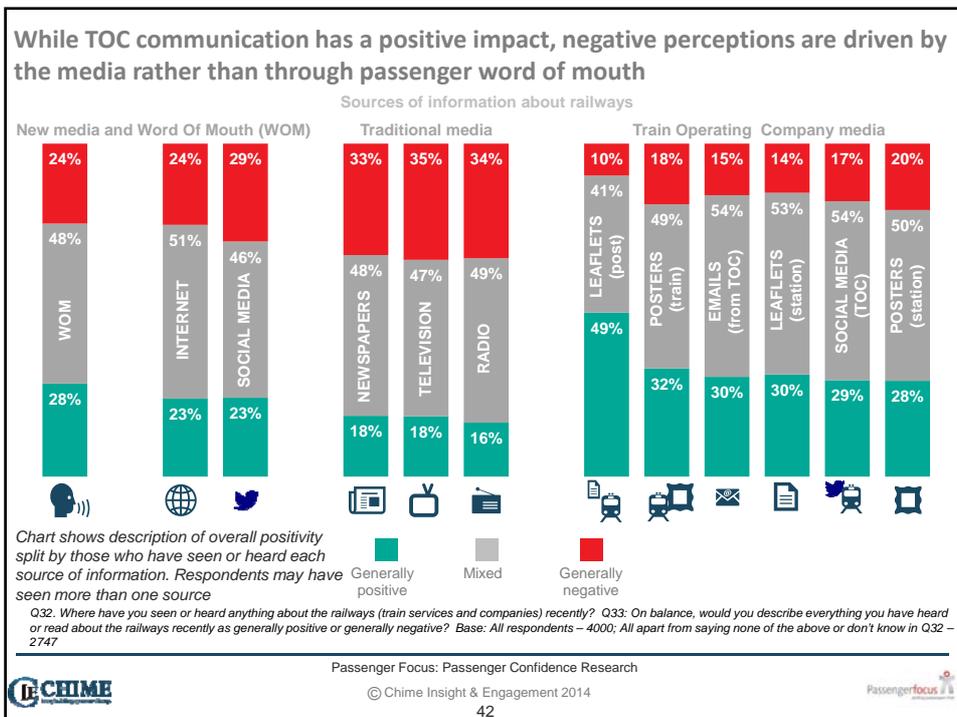
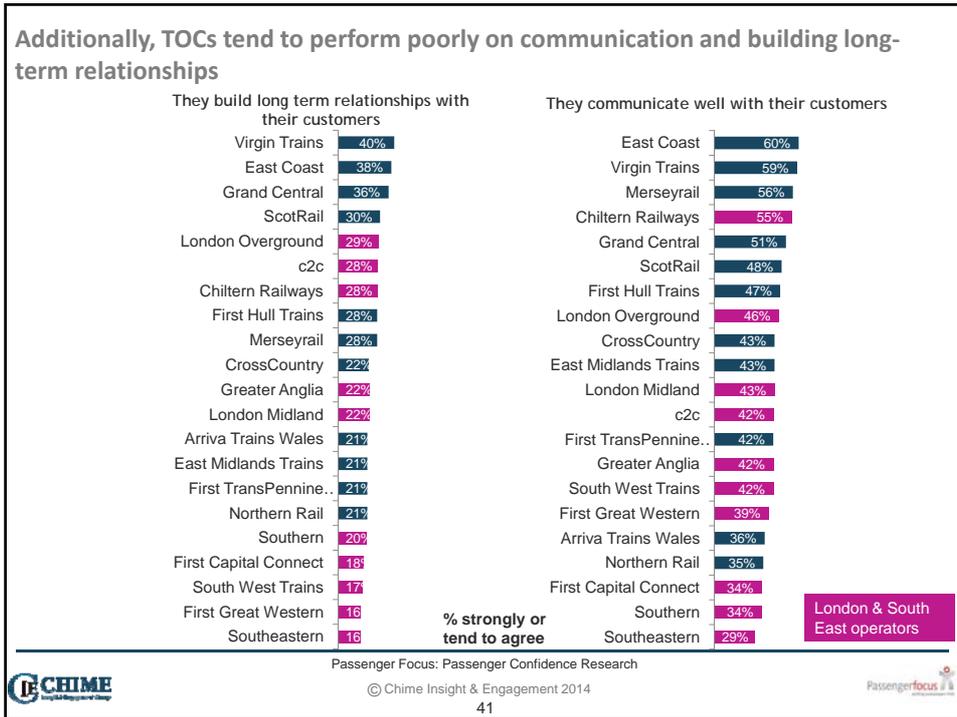


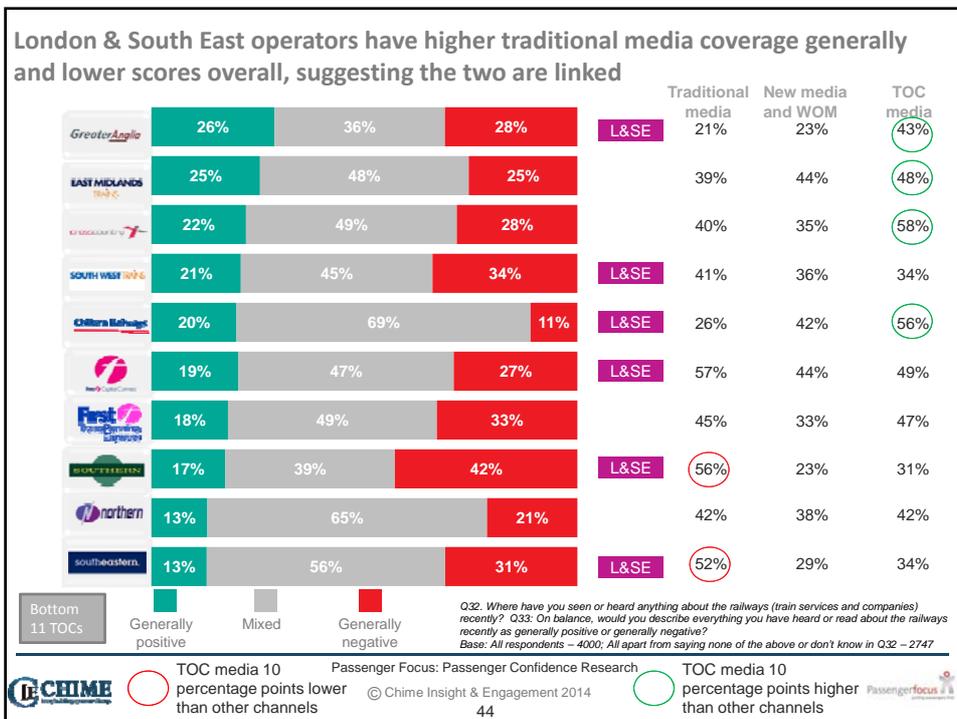
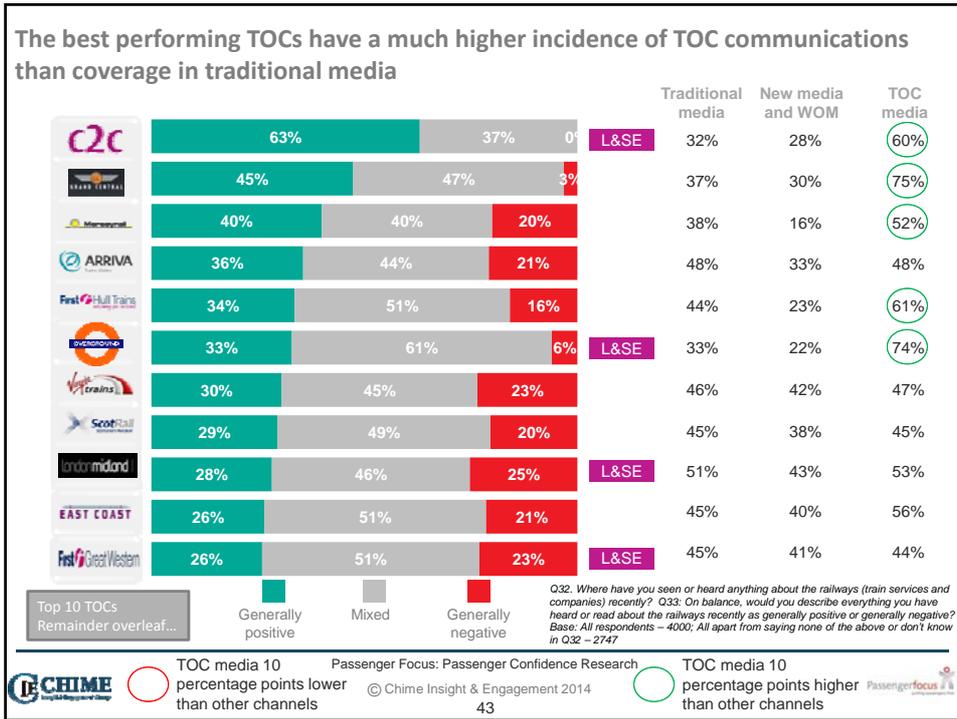




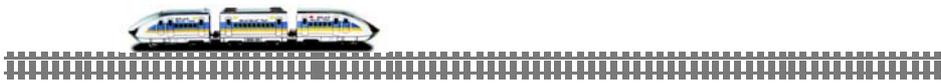








Trust in Judgement



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Trust in Judgement is the only Trust area with a positive net score and therefore, while important, is a lower priority for improvement



Judgement
"upwards trust"
- High principles
- Do the right thing even when no one is looking
- Good reputation in the industry
- Progressive in developing services
- Show leadership in the rail industry
Net agree: 16%

31%

-14%

Relationship
"sideways trust"

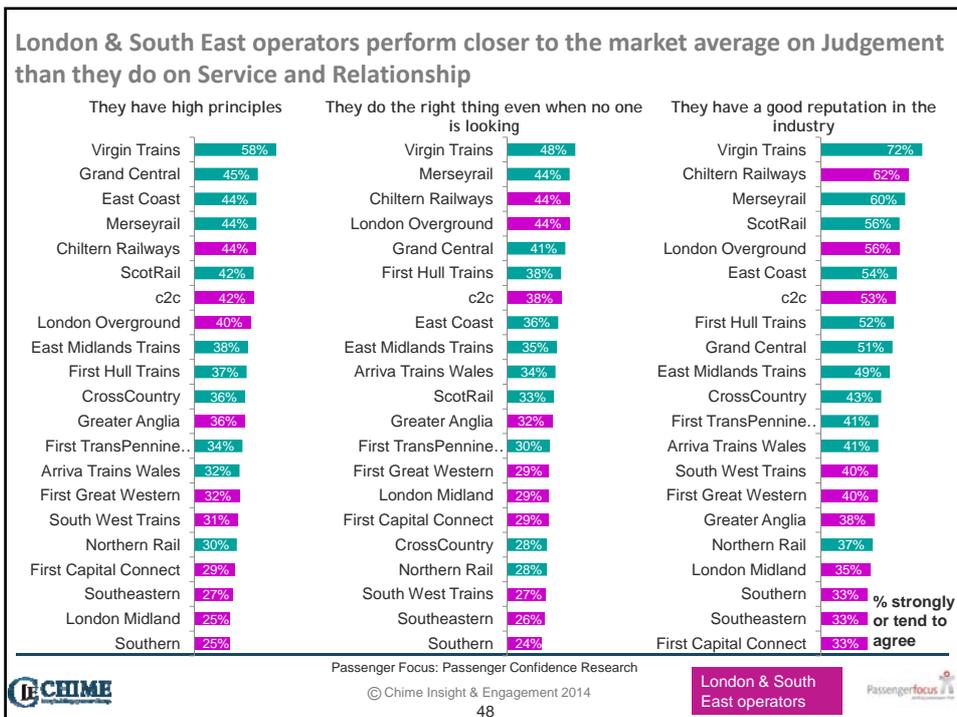
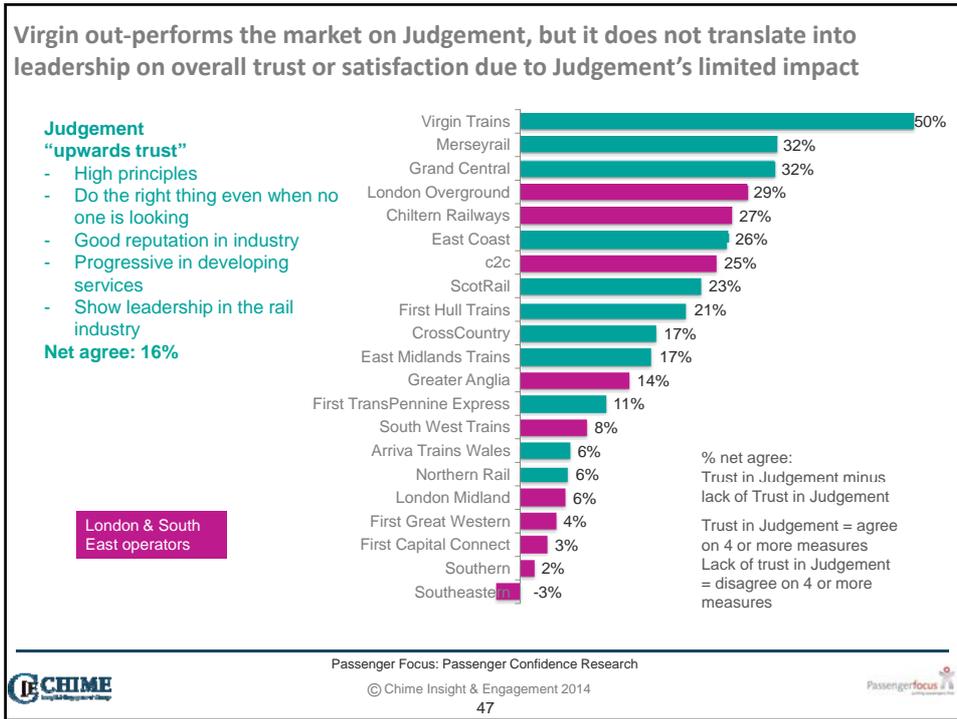
Service
"downwards trust"

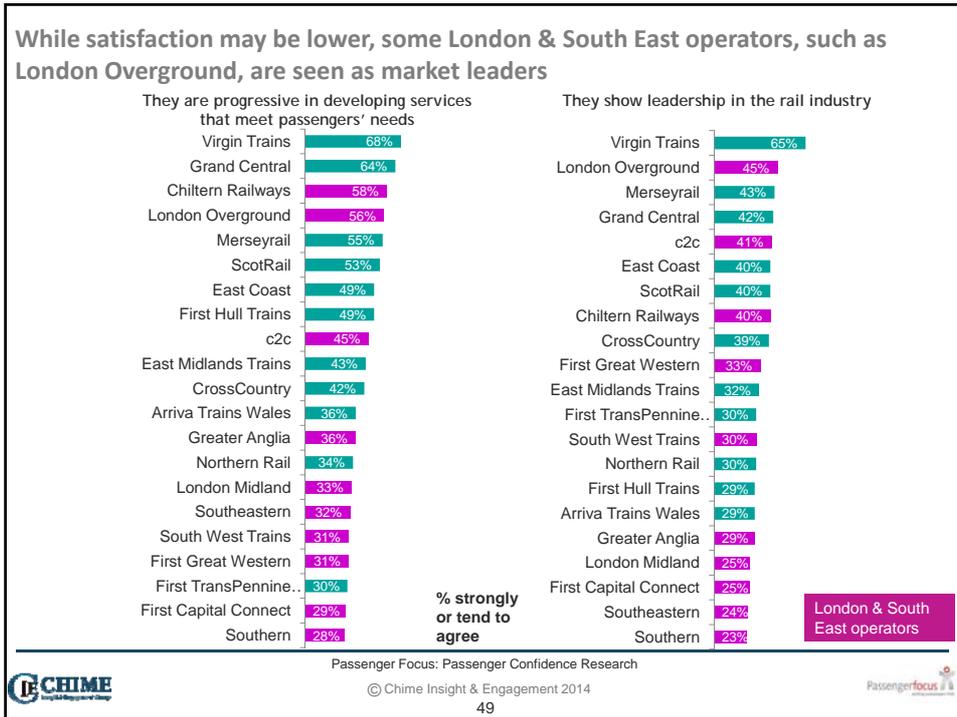
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TOC performance across each trust statement and the three levels of trust remains relatively consistent

In general, TOCs tend to perform similarly across each level of trust, however, there are notable exceptions:

-  London Overground has high trust in Judgement, mid ranking trust in Relationship and lower trust in Service. This high Judgement trust may explain why perceptions of the TOC are high
-  Greater Anglia also has higher Judgement trust than Service trust. Improving trust in service, reliability and value for money should be their key concern
-  Scotrail has the opposite pattern. There is very high Service trust, whereas it has an average performance on trust in Judgement. Scotrail could try to improve its reputation and demonstrate how it sets high standards

For a large number of TOCs, however, the key focus is improving reliability, especially for commuters, which is the key to improving trust in Service. Spontaneously many people mention reliability as their one key improvement. When there are service issues, communication is key, and a relationship with customers helps them to understand the problem

“Reliability - this is key when you have to be somewhere for a certain time.”

“More honesty when trains are delayed and cancelled.”

“Reliability of trains - because they can't be relied on to run at all or on time.”



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TOCs can gain trust by following good examples such as those mentioned for Merseyrail and London Overground: Majority of top of mind reasons for recommending these TOCs are Trust in Service

“...Always on time and good staff, friendly and efficient. but they do get packed on Friday nights you have to stand.”

“...Offer a good service and I have never had a problem.”

There are similarities in the organisation and customer make up of London Overground and Merseyrail. Trains are frequent and many journeys short. Customers trust that they will get to their destination when they expect to

“...Reasonable value for money and fairly good service...”

“...Because they're always on time and they have never let me down.”

“Punctuality, Staff availability, Comfort, Reliability, Frequency.”

Just one comment for Merseyrail touched on Trust in Relationship despite it having a positive net score

“Continuous improvements being made to accessibility, comfort, cleanliness and staff training to improve customer experience.”

“It goes places that other trains don't, it's quick, clean and cheap.”

“Decent, dependable service.”

“Good service, pricing reasonable, fair and convenient.”



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The Scottish and Welsh perspectives



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Scotrail has a low but positive trust in Service. It is meeting the hygiene factors and therefore the focus should be on improving Relationship trust

Scotland National Summary

Judgement
"upwards trust"
Net score

- Scotrail: 23%
- Average: 16%

Relationship
"sideways trust"
Net score

- Scotrail: 6%
- Average: -6%

Service
"downwards trust"
Net score

- Scotrail: 1%
- Average: -13%

Judgement

Only 33% agree that Scotrail will do the right thing when no one is looking, the only measure where Scotrail is average

33% trust unseen behaviour

Relationship

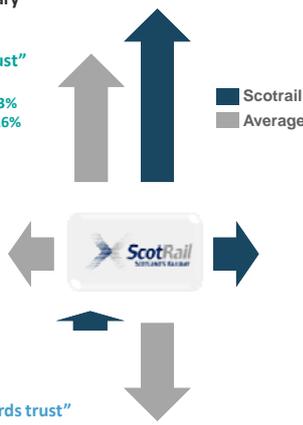
Low penetration of TOC media (45%) in comparison to other high performing TOCs, however, still seen to communicate well by half of customers (48%)

45% have seen TOC media

Service

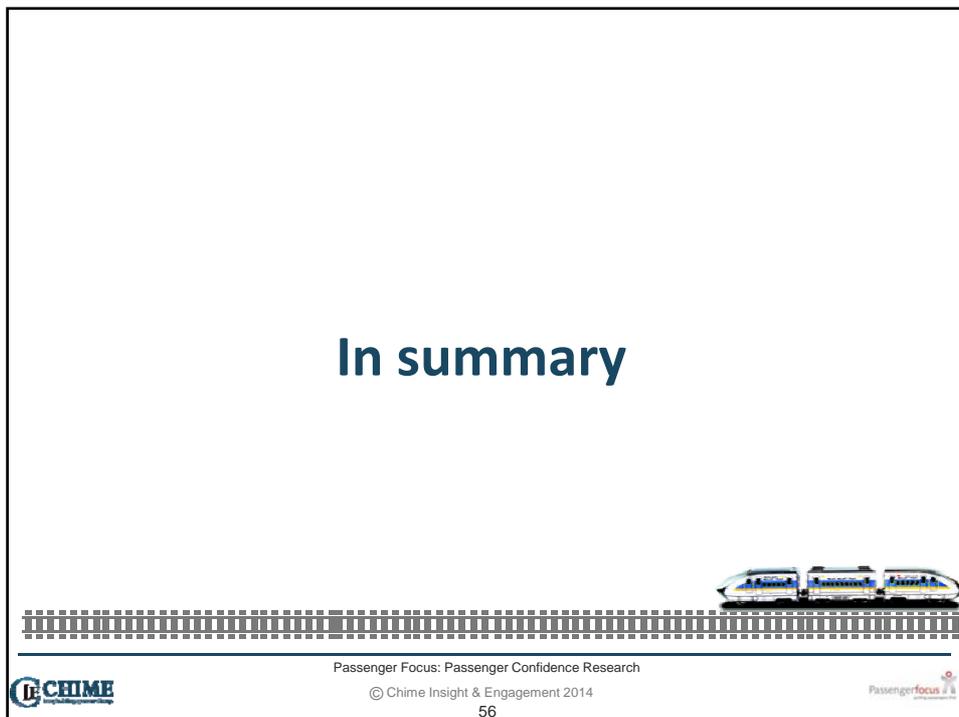
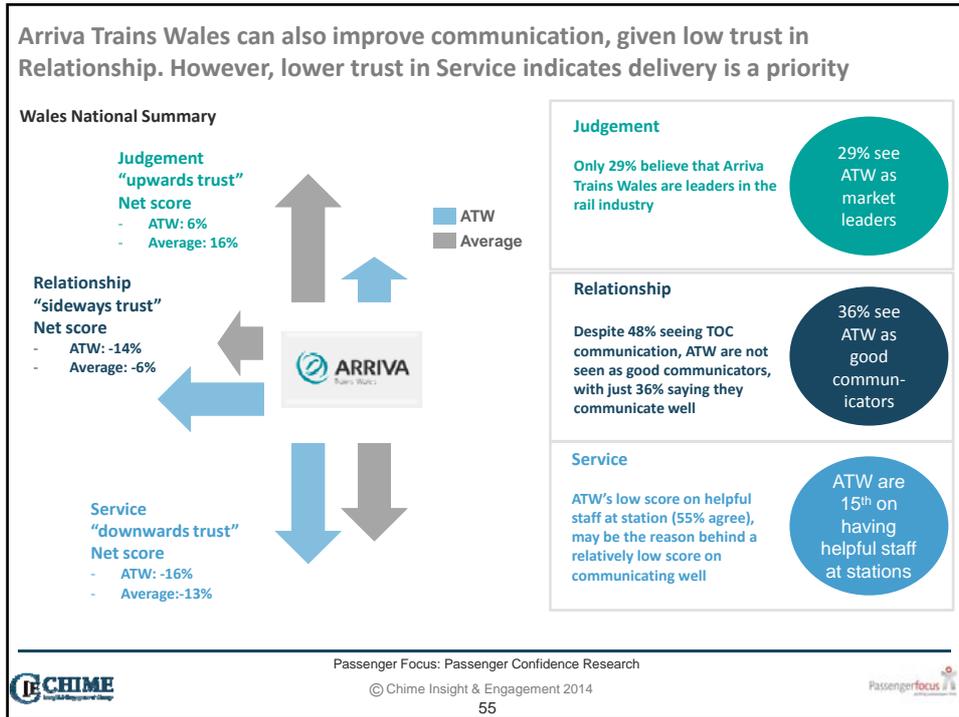
While Scotrail performs well on service, like all other TOCs it receives a low score on being good at resolving problems

39% believe Scotrail is a good problem solver



■ Scotrail
■ Average

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Trust in train operating companies is relatively low compared to other industries. This can be improved by focussing on Service and Relationship

1. Trust in Service

There is low trust in Service, which primarily covers the hygiene factors. Therefore, to improve trust (and therefore satisfaction), functional metrics measured by NRPS are still the priority

2. Trust in Relationship

However, most TOCs can also increase satisfaction by focussing on passenger engagement as there is low trust in Relationship, particularly in terms of openness and transparency in communications

3. Trust in Judgement

Trust in Judgement is the least important and likely to improve with higher trust in Service and higher trust in Relationship. However, corporate responsibility should not be ignored as a route to improving trust. In particular, this should be looked at by TOCs that are performing lower on Judgement than they are on Service and Relationship

Developing trust, from Service to Judgement

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Technical note

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Methodology

This report provides an overview of trust in Train Operating Companies and the need to develop closer relationships with customers.

-  Fieldwork: January 2014
-  Online questionnaire
-  200 interviews per TOC
200 non-quota'ed TOC users
4000 respondents in total
-  Targeting business users, commuters,
passengers making leisure visits



Nationally representative sample of rail passengers



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Demographic breakdown

	Journey purpose (at least every 6 months)	
	Unweighted	Weighted
Commuter	33%	28%
Business	36%	43%
Personal	95%	99%

	Age	
	Unweighted	Weighted
16-34	37%	35%
35-54	40%	39%
55+	24%	27%

	Gender	
	Unweighted	Weighted
Male	44%	45%
Female	56%	55%

	Disability	
	Unweighted	Weighted
No/none of these	91%	91%
Mobility	6%	6%
Wheelchair user	1%	1%
Hearing	2%	2%
Eyesight	2%	2%
Speech impairment	*%	*%
Learning difficulties	*%	*%




* = Less than half of 1 percent



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