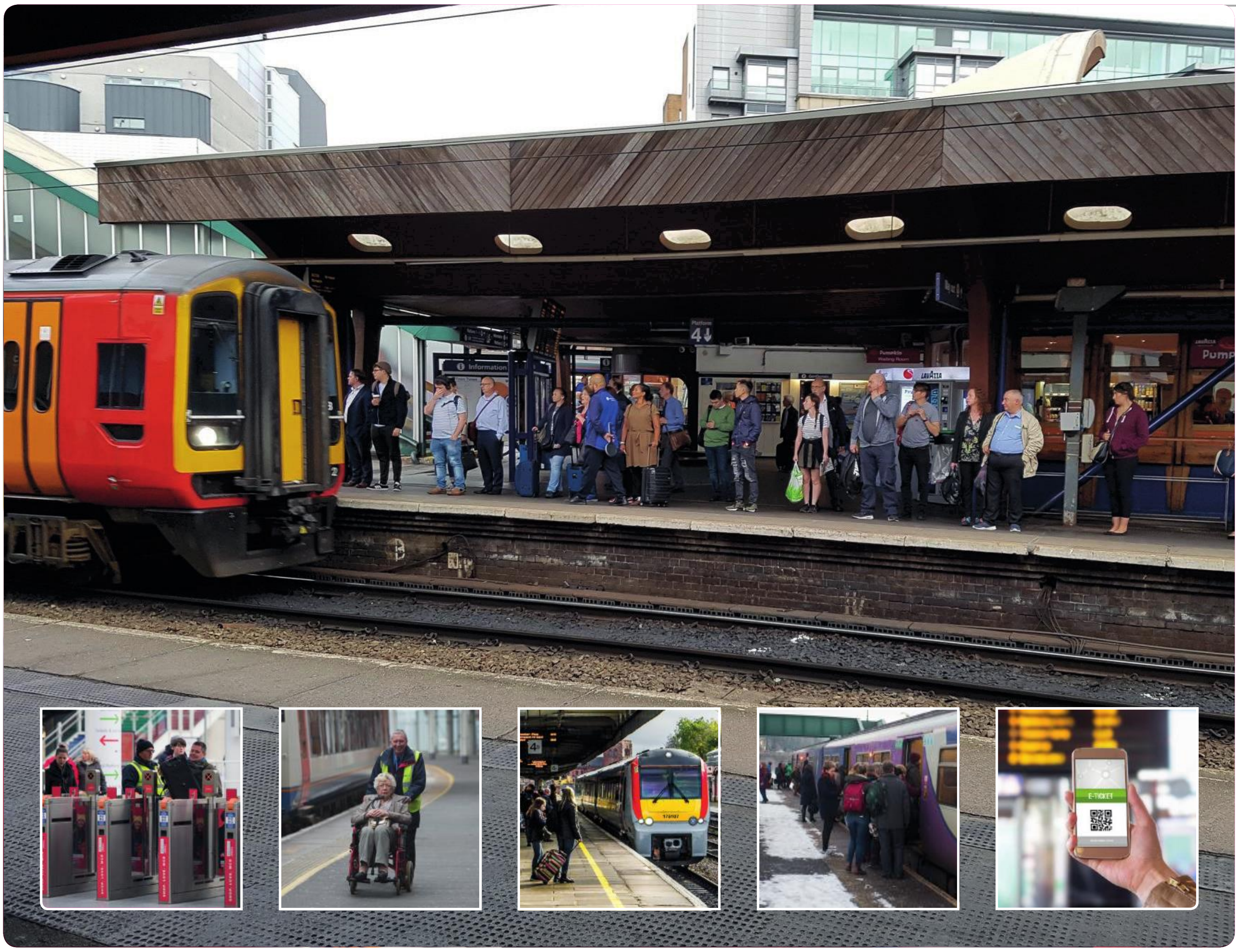


Williams Rail Review

Trust in train operators: an exploration of issues influencing passenger trust in rail

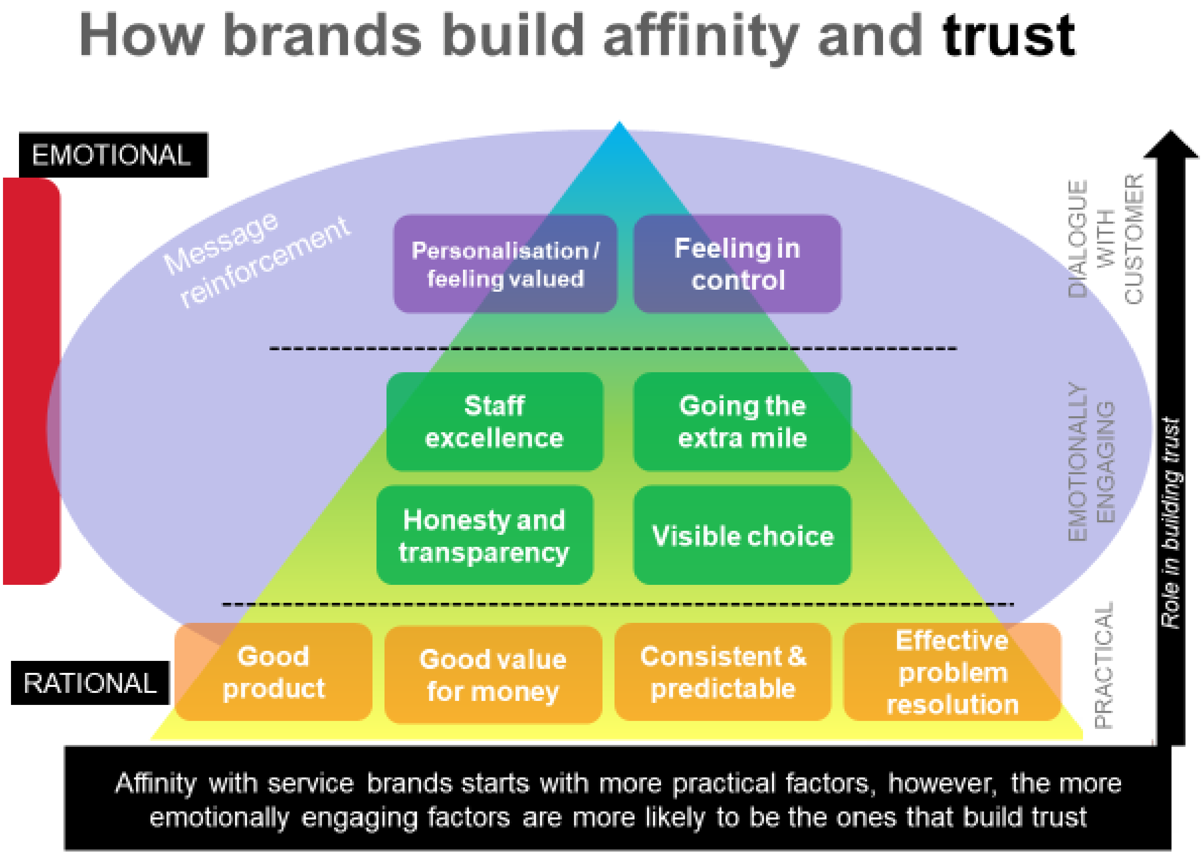
May 2019

transportfocus

Introduction

Transport Focus first investigated the issue of trust in the rail industry in 2014[1]. It found that the best performing train companies all had relatively high levels of trust, and low levels of distrust. From this report, Transport Focus developed a hierarchy of customer needs that underpinned feelings of trust.

Figure 1



The 2014 report concluded that improvements to the reliability of services was key to improving overall levels of passenger trust in an operator, but that doing this alone would not be enough. To really unlock the potential requires additional focus on communications, giving passengers a greater voice – with a much greater emphasis on transparency – and on giving them the information they need to hold train companies to account.

Given the interest - and challenges - associated with this important topic, Transport Focus undertook a further investigation of trust in 2017[2]. As well as taking a fresh look at what drives trust, this work expanded upon the pilot study with a much larger sample, enabling analysis to be carried out at train operating company (TOC) level.

[1] https://www.transportfocus.org.uk/research-publications/publications/passengers-relationship-with-the-rail-industry
[2] Powerpoint slide deck – Rail Passenger Trust December 2018

At the same time a question on trust was added to the Transport Focus bi-annual tracker survey of passenger satisfaction – the National Rail Passenger Survey (NRPS)[3]. Now, using the results for each of the spring and autumn waves over the past two years, Transport Focus has the start of a coherent, ongoing record of passenger trust scores and some insight into how they are moving, offering the ability to explore this complex issue more meaningfully.

Arguably, this issue has never been more important. Trust is vital to business. Building a good relationship with customers is seen as key to encouraging repeat business and in attracting new customers. However, despite considerable investment in infrastructure projects and new trains, Government and the rail sector have faced a groundswell of criticism, concern and distrust. Moreover, in the 2019 Bradshaw Address Keith Williams, Chair of the Government's Rail Review, suggested that the rail industry has lost sight of its customers and lost public trust.

The Williams Review is now seeking to address multiple identified weaknesses and failings of the rail sector, including lack of public confidence[4].

Transport Focus hopes that this work on trust, along with other submissions it has provided to the Williams Review[5], will make a useful contribution to the debate on the challenges for rail and help shape the subsequent plan of action.

What drives trust?

Transport Focus's research identifies three different aspects of passenger trust:

- Trust in Competence: *punctuality/reliability* is the single most important 'hygiene' factor overall; if this isn't right then trust just isn't possible. The central importance of punctuality/reliability chimes with other Transport Focus research where punctuality is a key driver of passenger satisfaction with their journey and features strongly in passenger priorities for improvement[6].

- Trust in Motive: provide passengers with a sense that the train company is looking out for them (and not purely driven by commercial goals)*: treating customers fairly, being clearly 'on my side'* and *communicating well* can all help drive up levels of trust.

- Trust in Judgement: passengers consider the overall judgement of train companies: are they *truthful*, do they *act with honesty and integrity*, do they have *high principles* and a *good reputation.* People look to all these things to gain a sense of whether, or not, a train company is trustworthy.

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[3] https://www.transportfocus.org.uk/research-publications/research/national-passenger-survey-introduction
[4] https://www.gov.uk/government/consultations/williams-rail-review
[5] https://www.transportfocus.org.uk/research-publications/publications/williams-review-passengers-think-structure-railway/
[6] https://www.transportfocus.org.uk/research-publications/publications/rail-passengers-priorities-for-improvement/

All the factors included within the model are set out in Appendix One. Taken together, the most significant drivers of trust suggest that delivering a reliable, dependable service, providing a sense that a TOC is looking out for their customers and creating a positive sense of sound overall judgement make the biggest difference in how passengers perceive the trustworthiness of an operator.

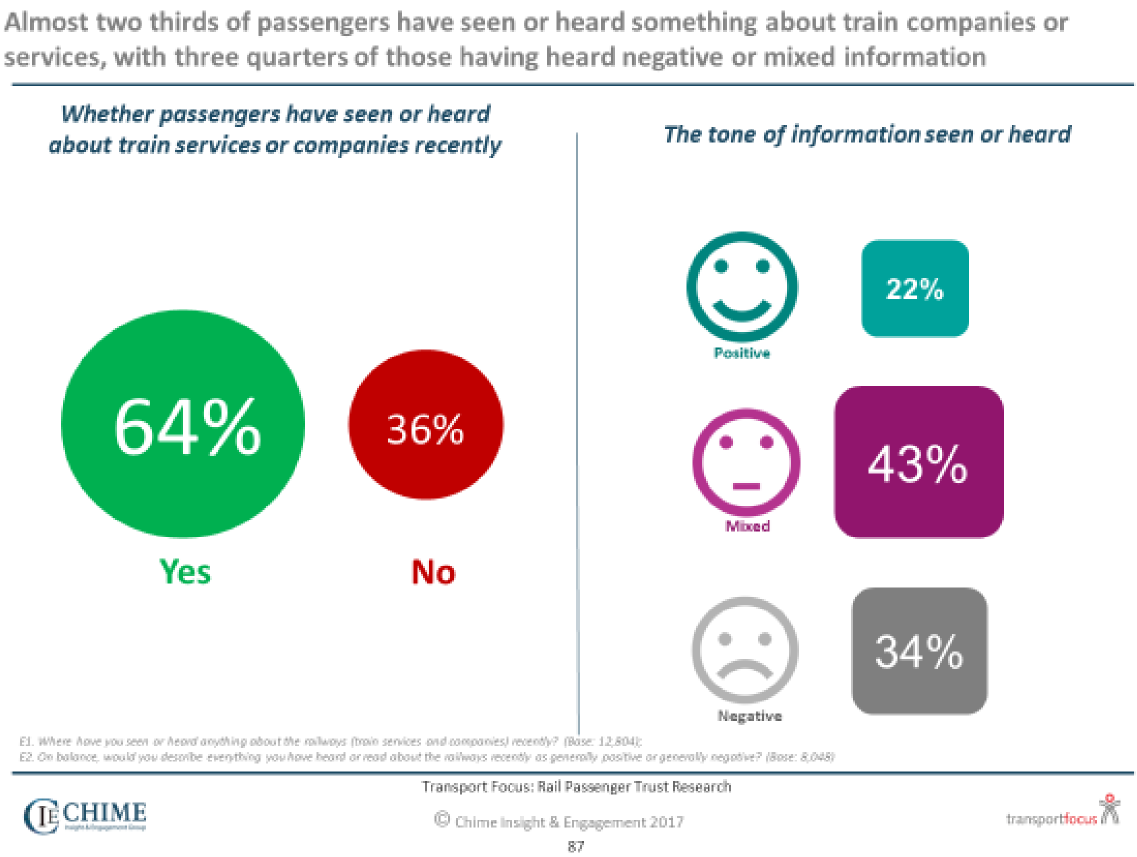
Building trust in a train company can therefore be regarded as a careful balance of:

- Doing what is supposed to be done – by getting people where they want to go, safely, at the time they expect to get there
- Showing care for customers – demonstrating 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 significance of communications

Most passengers in the 2017 study reported seeing or hearing information about the railways. Whilst much of the content was of mixed sentiment, overall this exposure was more likely to be negative than positive.

Figure 2



The source of information appears to influence the level of positivity or negativity. Positive items are more likely to have been seen or heard from direct communications, such as train company posters or leaflets. Television, radio and print/online news are more likely to be the channels by which people have heard negative stories. Passengers of Southern, Thameslink, Southeastern and South West Trains were the most likely to have seen/heard something negative.

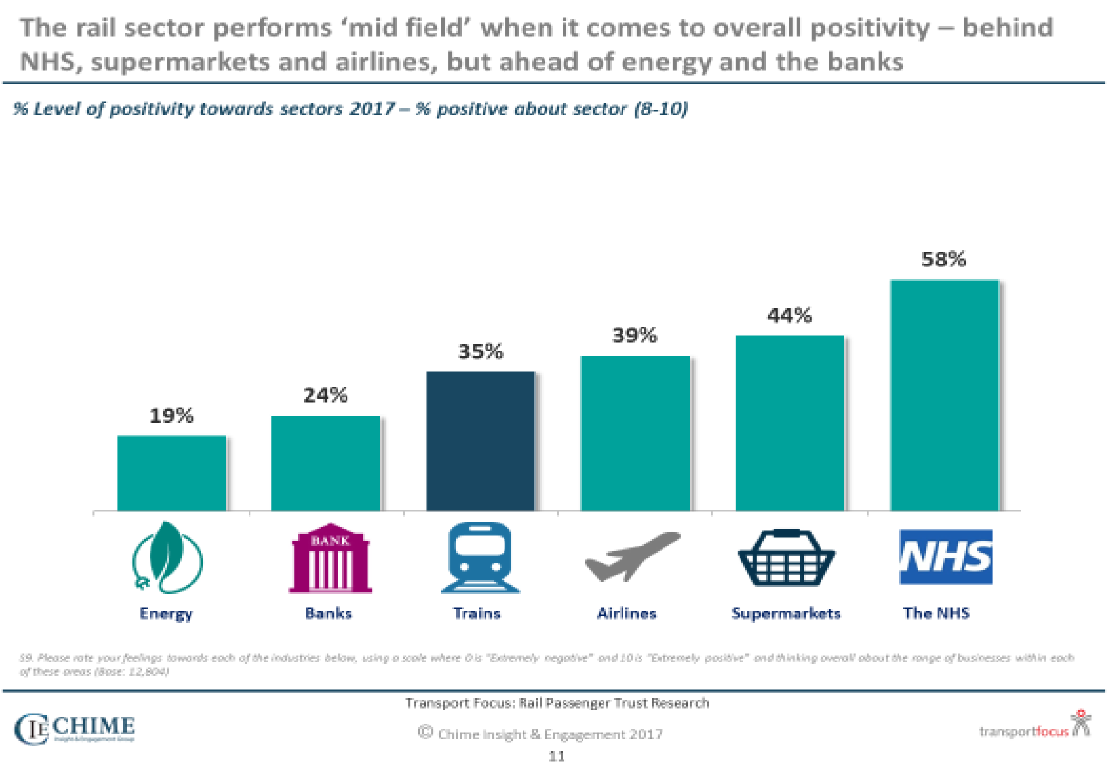
Perhaps unsurprisingly, the tone of information about the railway also has an influence on how well passengers perceive an operator to be communicating with customers. TOCs whose passengers have seen/heard more positive things also tend to be those rated highly for communicating well. Conversely, those hearing more negative items tend to regard an operator as communicating more poorly. However, it is important to note that it is hard from this data to understand what drives the relationship: people 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.

Appendix Two shows the sentiment breakdown of rail information heard by passengers of individual train operating companies.

How does the rail industry compare with other sectors?

As part of its research Transport Focus asked passengers to rate their views of various sectors. It found that the rail industry is seen less positively than the NHS and supermarkets, but not far behind airlines and some way ahead of banks and the energy sector. This relative status echoes the ranking found in 2014.

Figure 3



How are train operators scoring on trust?

Four waves of NRPS tracking show considerable variation in the trust scores achieved by individual TOCs[7,8] (see Table 1 below). Some of these movements will reflect the ebb and flow of experience arising from notable challenges that have faced the industry over this period. Passengers have borne the brunt of high-profile disruptions associated with - for example - infrastructure replacement, the introduction of new fleets or dealing with shortages of available rolling stock, and challenges with the timetable and industrial action.

The strongest performers are Grand Central and Heathrow Express who have consistently achieved trust scores of 70 per cent and above. Hull Trains delivered high 70s scores in 2017, although 2018 scores dropped below 60.

Chiltern, Merseyrail and Virgin Trains have all recorded trust scores of 60 per cent and above over the four waves. London North Eastern Railway (LNER) and c2c also produced scores in the sixties during 2017. c2c also achieved this in spring 2018.

At the other end of the spectrum, notably low scores for trust have been seen for Southern - just 17 per cent trust in spring and autumn 2017, with a slight improvement through 18 per cent in spring 2018, to 22 per cent in autumn 2018. This remains the lowest performing operator score in terms of passenger trust, closely followed by Great Northern, with 24 per cent, then South Western Railway and Thameslink, both on 27 per cent.

It is also instructive to consider the opposite dimension; the proportion of passengers who state they 'do not trust' the operator they travelled with. Southern holds the dubious distinction of the three highest 'do not trust' scores, rating 39 per cent in spring 2017, through 30 per cent in autumn of that year, then 28 per cent in spring 2018. However, at least this is a declining trend.

It is a concern that, in autumn 2018, four operators had 20 per cent or more of passengers recording a lack of trust. As well as Southern, with another reduction in negative sentiment to 23 per cent, Thameslink, Northern and Great Northern all saw increases in 'do not trust' levels. These were of eight, 14 and 15 percentage points respectively.

[7] Trust is measured in the NRPS on the same seven-point scale used in the trust research. Scores range from 7- 'Trust them a great deal' to 1- 'Do not trust them at all' where the two top scores are taken as indicative of trust and the two lowest scores as not trusting.

[8] There have been some changes to train operators, branding and network structures during the period of NRPS tracking and since the trust research was undertaken. In this section Transport Focus uses the current names and, where relevant, it notes the changes that have occurred in Appendix Three.

Table 1: Percentage of passengers expressing trust or not

NRPS wave	Autumn 2018		Spring 2018		Autumn 2017		Spring 2017	
TOC	Trust	Do not trust	Trust	Do not trust	Trust	Do not trust	Trust	Do not trust
London and South East Operators								
c2c	55	6	60	4	62	3	60	4
Chiltern	66	2	66	2	65	2	66	2
Gatwick Express	46	9	44	9	50	11	49	9
Great Northern	24	22	32	10	35	7	30	6
Great Western Railway	44	9	43	7	44	8	46	6
Greater Anglia	37	9	34	11	41	6	39	8
Heathrow Express	76	1	74	1	73	1	78	1
London Overground	52	3	48	4	53	3	58	1
South Western Railway	27	15	31	11	33	10	47	5
Southeastern	31	11	33	15	32	10	35	10
Southern	22	23	18	28	17	30	17	39
TfL Rail	50	5	Data from previous waves not comparable					
Thameslink	27	21	39	9	31	13	28	16
West Midlands Trains	44	5	45	6	49	5	50	5
Long-distance Operators								
CrossCountry	47	6	51	5	55	4	55	3
East Midlands Trains	49	4	54	3	55	3	58	2
Grand Central	70	1	73	1	79	1	75	1
Hull Trains	58	4	59	6	79	1	75	1
London North Eastern	51	4	54	5	62	3	62	2
TransPennine Express	39	10	54	6	52	6	58	4
Virgin Trains	60	4	62	4	62	3	68	2
Regional Operators								
TFW Rail	43	9	45	12	46	10	47	7
Merseyrail	65	3	65	3	65	3	69	2
Northern	31	22	41	10	47	8	49	6
ScotRail	42	11	47	9	48	4	48	5

Trends in trust

There does not appear to be an entirely consistent trend in trust across the rail sector. Some operators noticeably improve or decline, whilst others show more moderate fluctuations.

The influence of punctuality and reliability

Given its importance as the primary driver of trust (see Figure 1), Transport Focus has looked more closely at the linkages to passenger satisfaction with punctuality and reliability. Whilst this is not a linear relationship, there does appear to be a broad trend indicating that operators who perform well on this factor largely achieve higher levels of trust and, significantly, lower levels of distrust. Conversely, lower satisfaction with punctuality and reliability tends to be associated with higher levels of distrust and less trust.

Appendix Three contains charts illustrating the range of trust scores and satisfaction with punctuality and reliability for each operator over the four NRPS waves between spring 2017 and autumn 2018. Taken together it is possible to observe some interesting shifts in the two variables when comparing autumn 2017 with autumn 2018:

- Southern, the only operator with a statistically significant increase in trust, also shows a statistically significant increase in satisfaction with punctuality and reliability. This is alongside an eight-point decrease in distrust.

- Seven operators show a statistically significant decrease in both trust and satisfaction with punctuality and reliability: LNER, TransPennine Express, CrossCountry, Northern, South Western Railway, Great Northern and c2c.

- ScotRail and Thameslink, both with statistically significant drops in punctuality and reliability scores, show increases in the levels of ‘do not trust’ of seven and eight percentage points, respectively.

The above examples are instructive, but it is important to note that not every fluctuation in trust can be explained solely by punctuality and reliability.

For example, Heathrow Express and TfW Rail show a statistically significant increase in satisfaction with punctuality and reliability, but this has not led to any notable increase in levels of trust reported.

Similarly, the statistically significant decreases in satisfaction with punctuality and reliability on East Midlands Trains, London Overground and Greater Anglia do not seem to have led to a substantial drop in the trust scores. Hull Trains and Grand Central have both shown a significant drop in trust that is not reflected in a similar reduction in punctuality and reliability satisfaction.

Rail sectors and passenger type

The nature of the rail operation and mix of passenger type can also influence trust.

In general, the long-distance operators tend to score higher than the regional or London and South East, with the two open access companies scoring particularly strongly.

However, Merseyrail stands out amongst the regional sector as a high performer. With trust levels of between 60-70 per cent these scores are higher than those achieved by the franchised long-distance operators.

Similarly, Chiltern is notable amongst the London and South East sector with trust scores in the mid-sixties. These are higher than those achieved by several of the long-distance operators. c2c, too, also compares well against many of these TOCs.

Of the airport operators, Heathrow Express achieves high scores akin to the open access Grand Central. However, Gatwick Express performs more in line with the London and South East, probably reflecting the mixed market it serves.

The ‘journey purpose’ impact on trust is less clear cut. It is apparent that commuters generally have lower levels of trust and higher levels of distrust, with the opposite being true for leisure passengers (i.e. higher trust/lower distrust). However, the journey mix within operators is not necessarily a predictor of overall trust scores.

Grand Central and Hull Trains, along with Heathrow Express, have low levels of commuters, the former two with 16 per cent, the latter with 15. These operators have been, or consistently are, high performers.

However, LNER which also has just 16 per cent commuters, does not score so strongly but c2c, with the highest proportion of commuters (61 per cent), mostly delivers scores as good, or better than LNER.

There are age differences in trust. Passengers over 70 years of age have much higher levels of trust and lower distrust than other age groups. Trust scores decline through the middle-age groups, with the lowest scores being found amongst passengers of 26-30. Amongst the youngest ages passengers of 19-25 express less trust and more distrust than those of 16-18.

Given the spread of ages across TOCs is broadly similar, this is unlikely to have much influence on individual operator trust profiles.

Other influences on trust

Beyond the core competence factor of punctuality and reliability, elements of motive and judgement also influence trust.

To recap from the section on drivers of trust above, the motive components of treating customers fairly, being ‘on my side’, and of communicating well are all influencers of trust.

From the judgement dimension; good reputation in the industry, being progressive in developing passenger services, acting with honesty and integrity, being truthful, having high principles and showing leadership all influence whether people regard a train company as trustworthy.

How passengers develop their view of these factors can be more subjective. Direct experience is likely to permit an assessment of communication, whether that is during a journey itself or in the wider engagement that the operator promotes. Fairness to customers and being ‘on my side’ might partly be based on personal experience, including the way delays are handled and compensation entitlement communicated or subsequently handled but it can also be influenced by other things seen and heard. This could be how staff respond to circumstances, what other passengers say, social media comments or from the media more widely.

Similarly, judgement criteria will be derived from an overall sense of a company’s approach and standing. Some elements will be influenced by direct experience. For example, the introduction of a reliable Wi-Fi service on trains, providing more services at busy times or finding a solution to difficult situations. But other factors are likely to be driven by more diverse impressions, coloured by a range of influences, some of which will, inevitably, come from media or by word of mouth.

Passengers’ views of motive and judgement elements may not all be within the specific control of any individual operator.

The wider context

The points above bring us, inexorably, to the wider real-world context in which rail services operate and passengers live all elements of their lives.

There can be no doubt that rail, as an industry, suffers from a notably poor reputation. A stream of seemingly endless, frequently negative, media stories rolls across print, television, radio and other channels. Individuals vent their spleen to their friends and colleagues and post to social media. User groups are formed to challenge a range of issues from poor service, lack of responsiveness to emerging needs, or changes to staffing that are seen to be detrimental to customer care.

All of this has come at a time when government and the rail industry have been investing substantial sums in major infrastructure projects, new trains and increased technology to support service delivery. Despite this, the perception of rail does not seem to have improved in line with the anticipated benefits. In fact, it appears that reputation has waned and trust has been shaken in some areas.

Part of the answer to this must lie in the upheaval and disruption that has accompanied some of the major change programmes. Some of these have, unfortunately, become enmeshed with significant challenges in delivery, leading to some very poor experiences across many parts of the network. Other services plainly struggle to deliver a consistent and reliable day-to-day experience. Information in these circumstances does not always meet passenger needs. In addition, industrial action has pitted operators against unions, with passengers suffering cancellations and crowding as a result.

Alongside this, perennial concerns about the complexity and inconsistency of the fares and ticketing system have continued to distress and infuriate passengers. Prices have risen faster than inflation and wage growth, even when services have been disrupted or restricted. Many passengers feel captive, with no alternatives and think their custom is taken for granted.

Perhaps more broadly and significantly, there appears to be a limited ability to communicate widely and openly or to operate transparently to ensure passengers are aware of the full picture about factors that impinge on their experience. It can seem that different parts of the rail industry pass blame for problems that impact on passengers, rather than focusing on what needs to be done to put things right. Similarly, the rationale for choices made by the industry when new timetables are in development is not always clearly conveyed, meaning passengers do not necessarily get explanations that help them understand what can sometimes seem to be unfair or perverse decisions.

All the above highlights the importance of putting the consumer closer to the heart of business strategy and operations for the railway. All touch points should be geared to understanding need and towards communicating and delivering as personally as possible.

Transport Focus has seen emerging trends which indicate the rail sector understands and is aiming to grasp these challenges. But if trust is to improve these efforts need to be nurtured, sustained and extended.

What do passengers say?

Recent work undertaken to inform Transport Focus's input to the Williams Review has brought passenger perspectives on the rail industry to life[9]. Views expressed during this research are relevant to the trust debate.

Typically, rail is of low salience and passengers' priorities focus on the 'here and now' seeking tangible benefits that ease their journey; typified by a 'just get it right' perspective. There is limited understanding of industry structures and this can lead to cynicism and suspicion about motives and priorities.

> *"We're not customers, we're cattle!"*
>
> *"The way they think it's okay to let people down with repairs or cancellations, that's not giving a good service."*
>
> *"So, we're not really the customer of train operators; they're ultimately trying to please the person who's giving them the most money – the person that granted them the licence."*
>
> *"I think that's why people are dissatisfied, because there's nobody actually in charge of it."*

There are generally weak brand associations and poorly articulated customer propositions. Poor communication limits the ability to build confidence and trust.

> *"When you shop you've got a choice of Waitrose or Aldi, do you know what I mean? You've got a choice. But when you go on the train, there isn't a lot of choice, is there?"*
>
> *It's too confusing as well. If you're not used to it, it's quite confusing…"*
>
> *"I'm a customer to John Lewis; even though I'm a pound sign, the loyalty I get from them makes me feel special. I don't get that from the train."*
>
> *"These privatised rail networks, they're just cashing-in on people that need to use it."*

Significantly, Transport Focus found that perceptions of rail are also driven by issues beyond direct experience. Emotional factors have an impact and myths or misconceptions are widespread and prevalent.

> *"We're the worst train service in Europe. We can't compete."*

[9] https://www.transportfocus.org.uk/research-publications/publications/williams-review-passengers-think-structure-railway/

> *"The Europeans, they're more modern, they're sleek and cleaner. I just think ours, you sit on ours and you're like, I need a shower."*

There is a strong sense that there is insufficient accountability and transparency. It seems clear that, ultimately, there is also no strong positive rail narrative.

> *"I think there's too much 'pass the buck'. The passengers blame the train operators, train operators blame government, government blame the train operators and it all comes back to the passengers."*

> *"Accountability means that when the service isn't up to scratch, there's some repercussion. I think there is, but they're not transparent about how it works."*

> *"Maybe there should not be so many fingers in the pie and maybe a specific person, body, group, [so] that if there are issues they can be held accountable for it."*

What next to build passenger trust?

Building passenger trust is high on the rail agenda, as it undoubtedly should be. In this section Transport Focus links its growing understanding of passenger trust with themes and knowledge based on its wider work and experience.

Transport Focus is committed to evolving its thinking in this area and seeking synergies with other workstreams and partners. It will be looking at ways to develop new tools and create actionable insights. It wants to help the industry respond to the pressing need to grow trust and build an enhanced reputation based firmly on delivery of positive experiences for passengers.

The starting point and top priority for rail must be to ensure all parts of the industry work together to bring an unrelenting focus to delivering reliable and punctual services.

Alongside this, Transport Focus emphasises its recommendation that a right time performance culture is instituted across the network. Small delays can have a significant impact on passenger satisfaction. The recent announcement that performance reporting will change to better reflect passenger experience is therefore welcome.

The language and tone of all communications should be thoroughly reassessed. Clear and consistent explanations must always be delivered, and especially when things go wrong. Announcements that are close to meaningless, such as stating a delay has occurred 'due to a delay to an earlier train', should be consigned to history and an improved vocabulary adopted for dialogue with passengers. When things have gone wrong, rights to compensation must be widely promoted with easy access to refunds provided. Automating this process wherever possible will help generate confidence in the positive intent of operators.

Fares and ticketing are already in transition and the importance of developing a credible system cannot be understated. The blanket application of fare rises should also be reviewed. It is untenable to hike prices against a backdrop of disruption. If service has been very poor, then passengers should not be asked to pay more for the dubious privilege of an inconsistent or detrimental experience. Any increases should be based on the Consumer Price Index (CPI) and not the discredited and usually higher formula of the Retail Price Index (RPI).

Care for passengers needs to flow across the entire range of touchpoints. All staff should be trained and equipped to engage constructively with passengers. Whatever the role, staff are all ambassadors for the company and need to demonstrate customer care. Any complaints should be reviewed to learn what problems might be avoided in future. Responses should seek to generate confidence and demonstrate the positive intentions of an operator who seeks to ensure that a passenger returns.

Passengers are interested in the elements of an operation that relate to their experience and needs. Providing disaggregated and personalised information is an important building block for a more tailored relationship. Thought should be given to how loyalty and ongoing business can be rewarded.

Across the industry, much more needs to be done to demonstrate true accountability and bring greater transparency to the decision making and operational processes. Transport Focus hopes and expects that the Williams Review will generate fresh ideas that will be swiftly adopted and used to build confidence and trust.

In the meantime, Transport Focus will continue to track trust in operators through NRPS. It will also report on changes and seek to work with operators to help them understand how they can foster stronger and more positive relationships with their passengers.

Transport Focus will also explore how and where it can enhance trust measures in order to facilitate greater understanding of this complex and evolving agenda. The aim is to support rail practitioners with actionable insights that will lead to better outcomes for passengers, to underpin a more positive and constructive relationship with rail.

Appendix 1 - Three dimensions of experience in the trust model

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

CHIME

Transport Focus: Rail Passenger Trust Research

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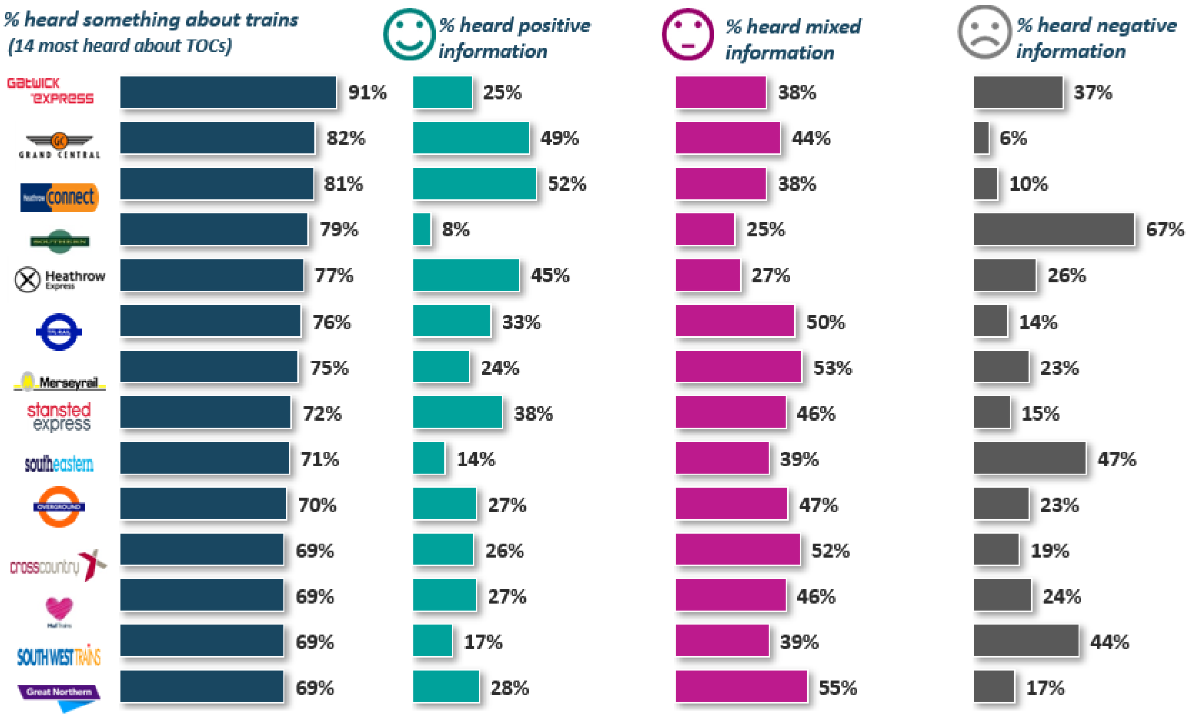
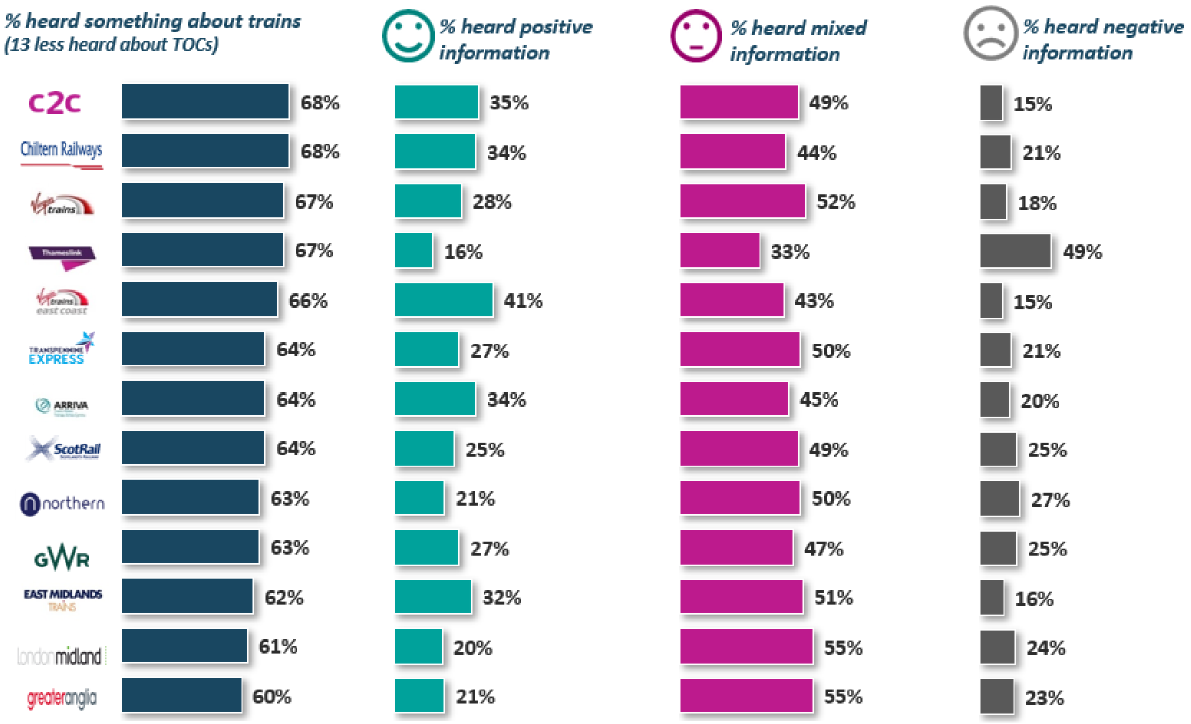
Appendix 2 Information about trains heard by passengers of different operators





Appendix Three – Train Operator Trust Scores

Introduction and Key to charts

This appendix contains charts and data to illustrate the range of trust scores for individual train operators over the four National Rail Passenger Survey (NRPS) waves between spring 2017 and autumn 2018.

Key to charts:

Trust Neither/Nor Do Not Trust Punctuality

Indicates statistically significant decrease since Autumn 2017 wave

Indicates statistically significant increase since Autumn 2017 wave

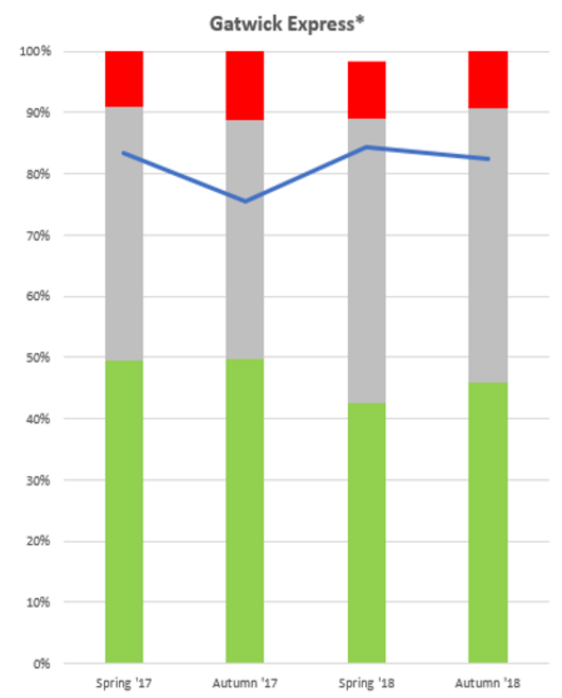
Scores are shown as percentages and data is rounded to nearest whole number.
Left hand charts show TOC trust scores alongside satisfaction with punctuality and reliability.

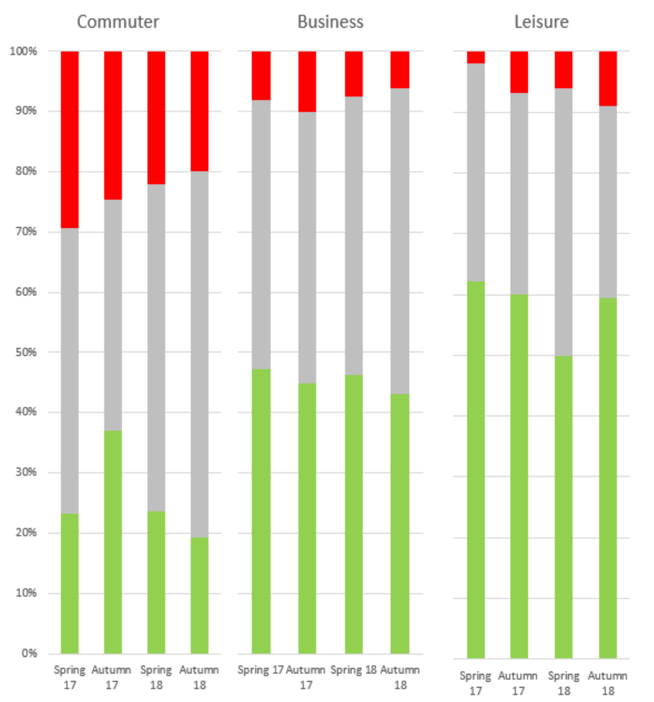
Right hand charts show levels of trust by journey purpose.

Tables provide trust data over the past four waves for the operator overall and by journey purpose. The tables also include Autumn 2018 sample sizes for trust responses to indicate the relative size of the different markets served. Small sample sizes should be treated with caution as data can fluctuate.

There have been some changes to train operators, branding and network structures during the period of NRPS tracking and since the trust research was undertaken. In this appendix we are using the current names and, where relevant, we note the changes that have occurred.

Gatwick Express – London and South East Operator

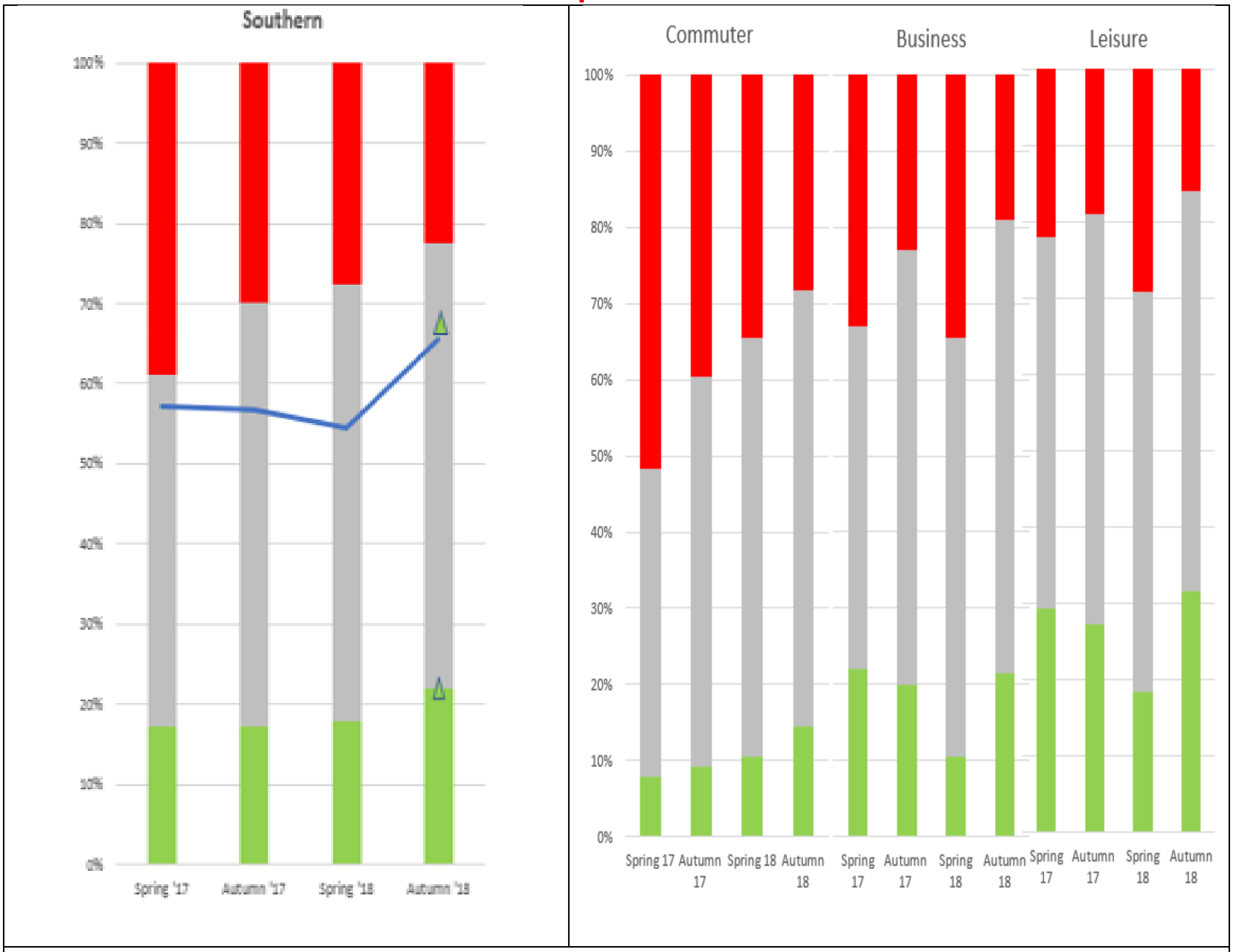




TOC / purpose	Gatwick Express		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	49	9	23	29	47	8	62	2
A17	50	11	37	25	45	10	60	7
S18	44	9	24	22	46	8	50	6
A18	46	9	19	20	43	6	59	9
A18 sample			128		69		195	

*Part of the Govia Thameslink Railway franchise. Comparisons between Autumn 2018 and previous waves may have been affected by changes to TOC routes since Spring 2018.

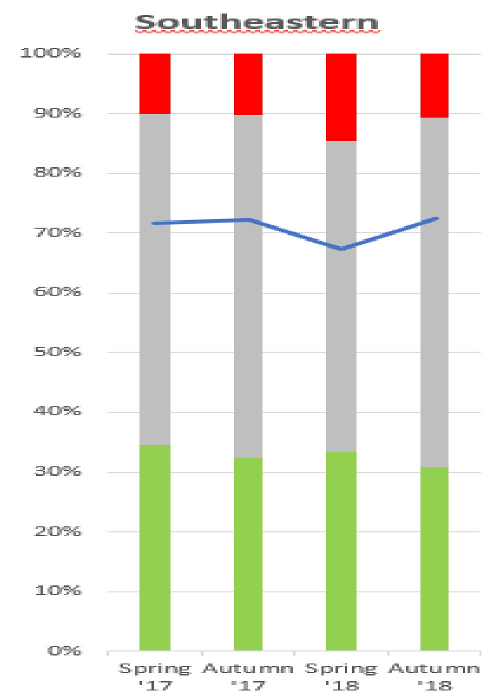
Southern – London and South East Operator

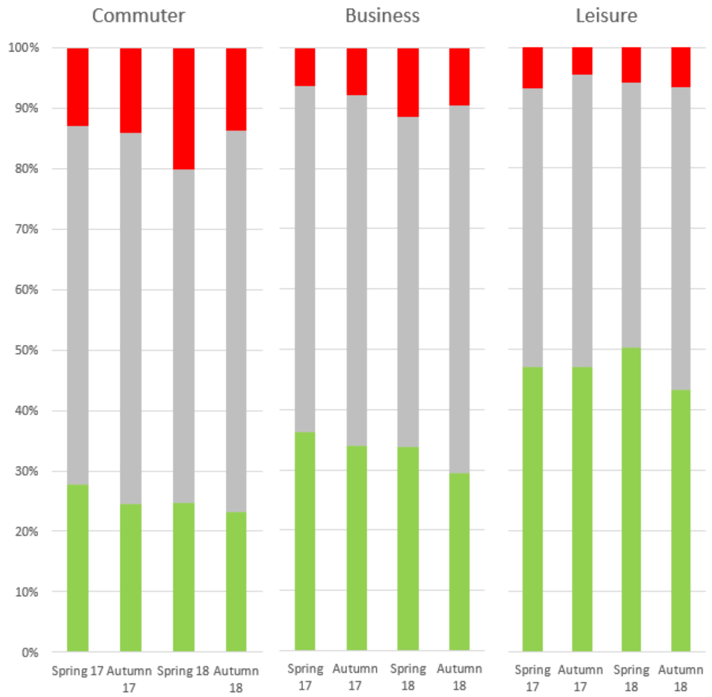


TOC / purpose	Southern		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	17	39	8	52	22	33	29	22
A17	17	30	9	40	20	23	27	19
S18	18	28	11	34	11	34	19	29
A18	22	23	15	28	21	19	32	16
A18 sample			523		89		637	

*Part of the Govia Thameslink Railway franchise. Comparisons between Autumn 2018 and previous waves may have been affected by changes to TOC routes since Spring 2018.

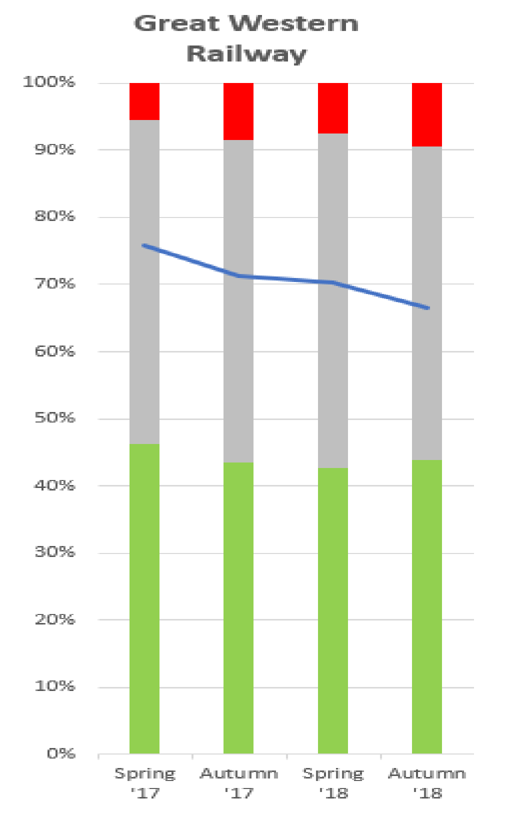
Southeastern – London and South East Operator

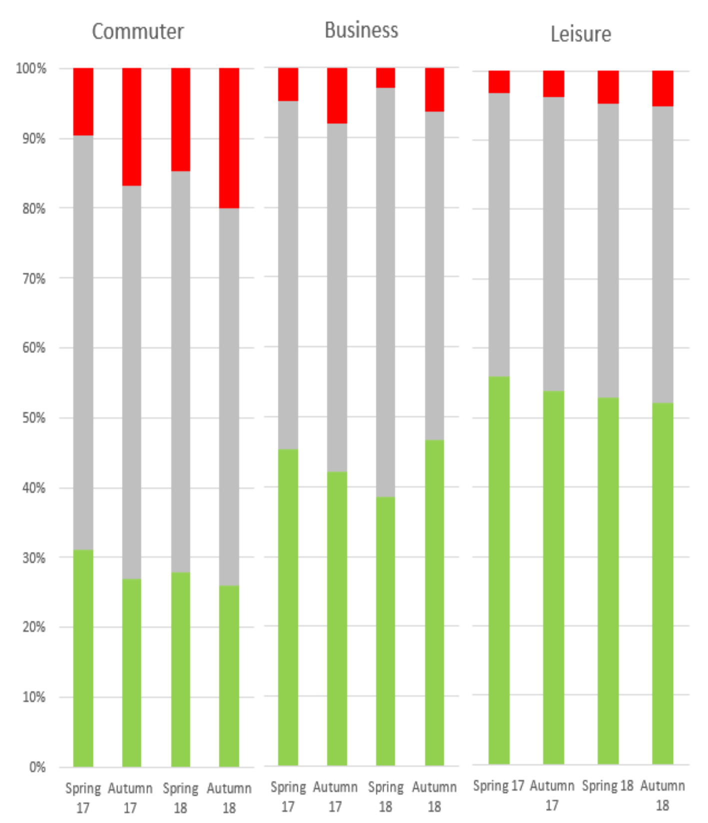




TOC / purpose	Southeastern		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	35	10	28	13	36	6	47	7
A17	32	10	25	14	34	8	47	5
S18	33	15	25	20	34	12	50	6
A18	31	11	23	14	29	9	43	7
A18 sample			722		97		575	

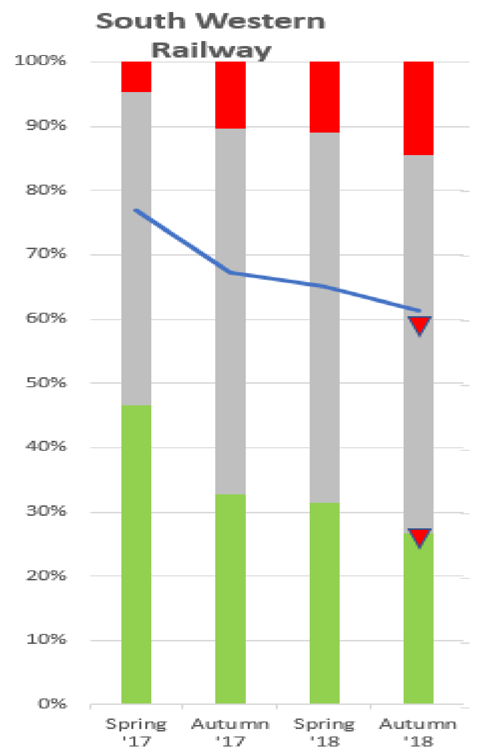
Great Western Railway – London and South East Operator

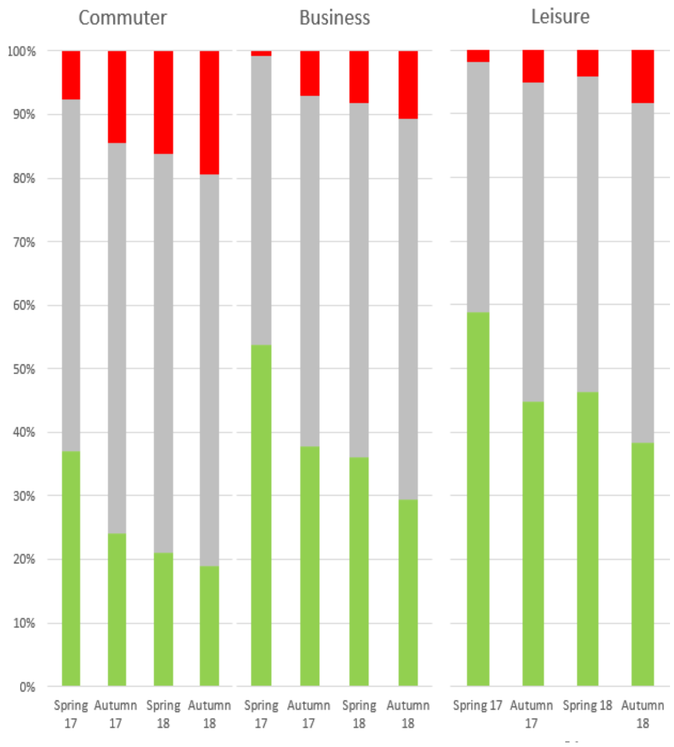




TOC / purpose	Great Western Railway		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	46	6	31	10	45	5	56	3
A17	44	8	27	17	42	8	54	4
S18	43	7	28	15	39	3	53	5
A18	44	9	26	20	47	6	52	5
A18 sample			528		199		627	

South Western Railway – London and South East Operator

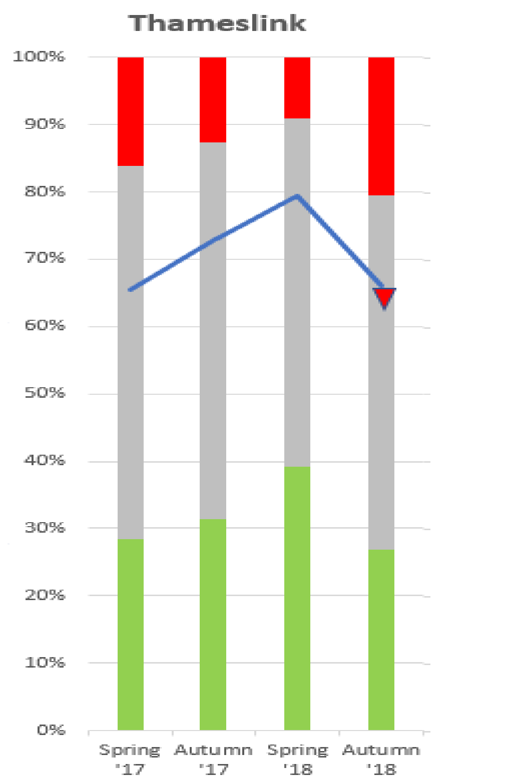


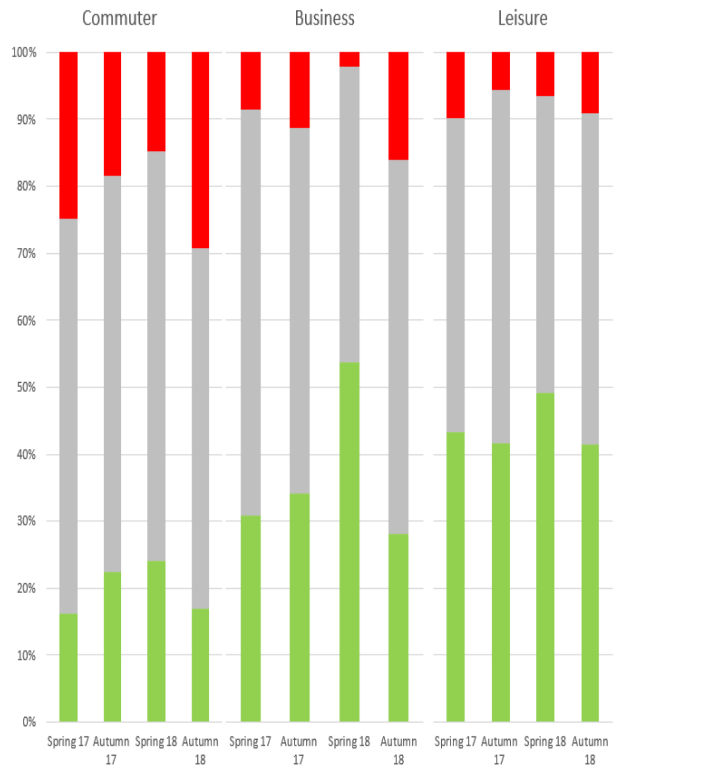


TOC / purpose	South Western Railway		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	47	5	37	8	54	1	59	2
A17	33	10	24	14	38	7	45	5
S18	31	11	21	16	36	8	46	4
A18	27	15	19	19	29	11	38	8
A18 sample			892		175		917	

* South Western Railway rebranded from South West Trains from Autumn 2017.

Thameslink - London and South East Operator

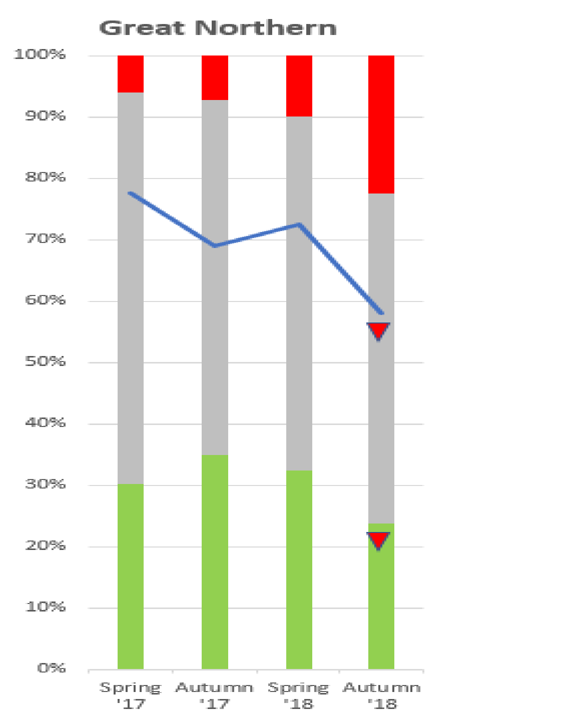


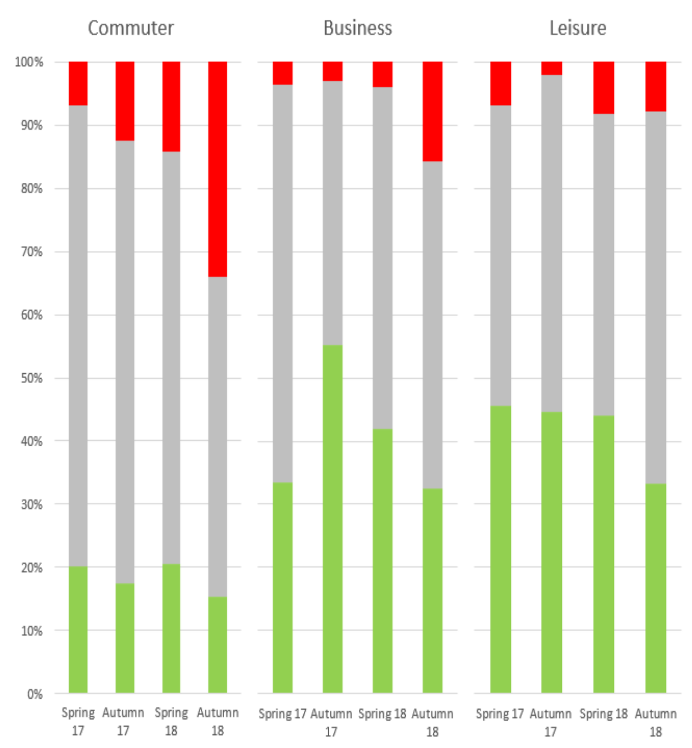


TOC / purpose	Thameslink		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	28	16	16	25	31	9	43	10
A17	31	13	22	18	34	11	42	6
S18	39	9	24	15	54	2	49	6
A18	27	21	17	19	28	16	41	9
A18 sample			637		111		373	

*Part of the Govia Thameslink Railway franchise. Comparisons between Autumn 2018 and previous waves may have been affected by changes to TOC routes since Spring 2018.

Great Northern - London and South East Operator

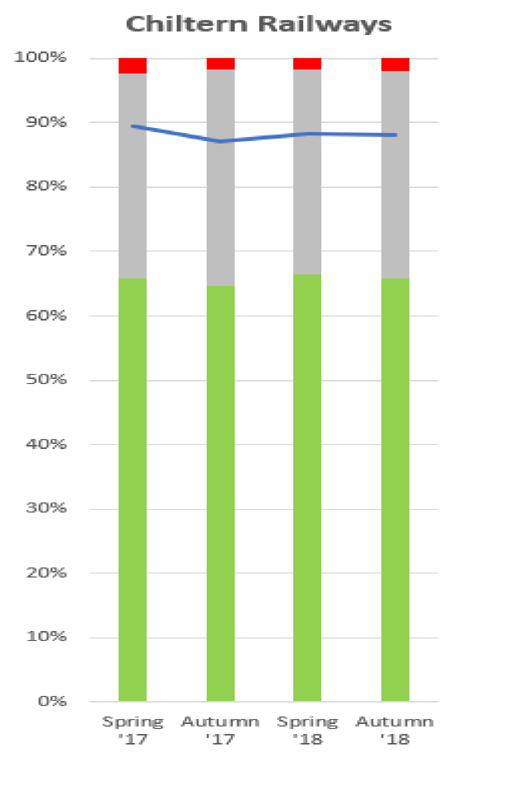


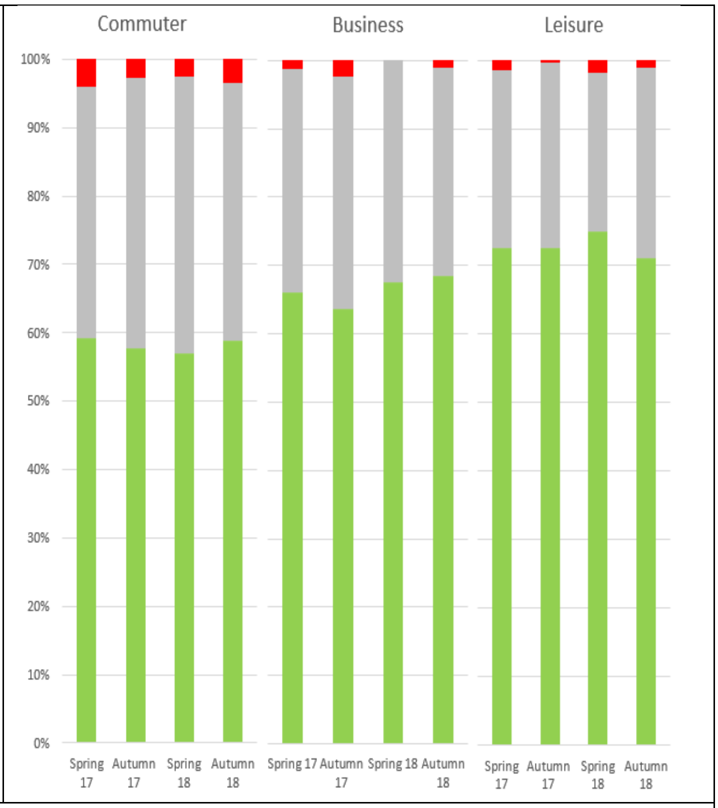


TOC / purpose	Great Northern		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	30	6	20	7	33	4	46	7
A17	35	7	18	13	55	3	45	2
S18	32	10	21	14	42	4	44	8
A18	24	22	15	34	32	16	33	8
A18 sample			242		28		167	

*Part of the Govia Thameslink Railway franchise. Comparisons between Autumn 2018 and previous waves may have been affected by changes to TOC routes since Spring 2018.

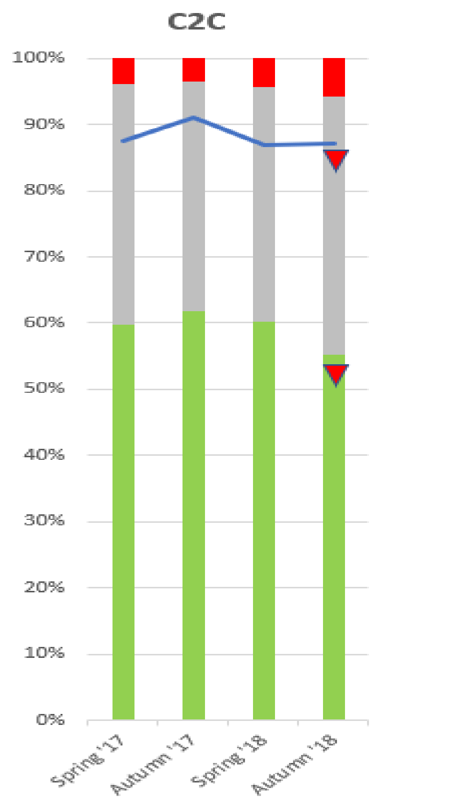
Chiltern Railways - London and South East Operator

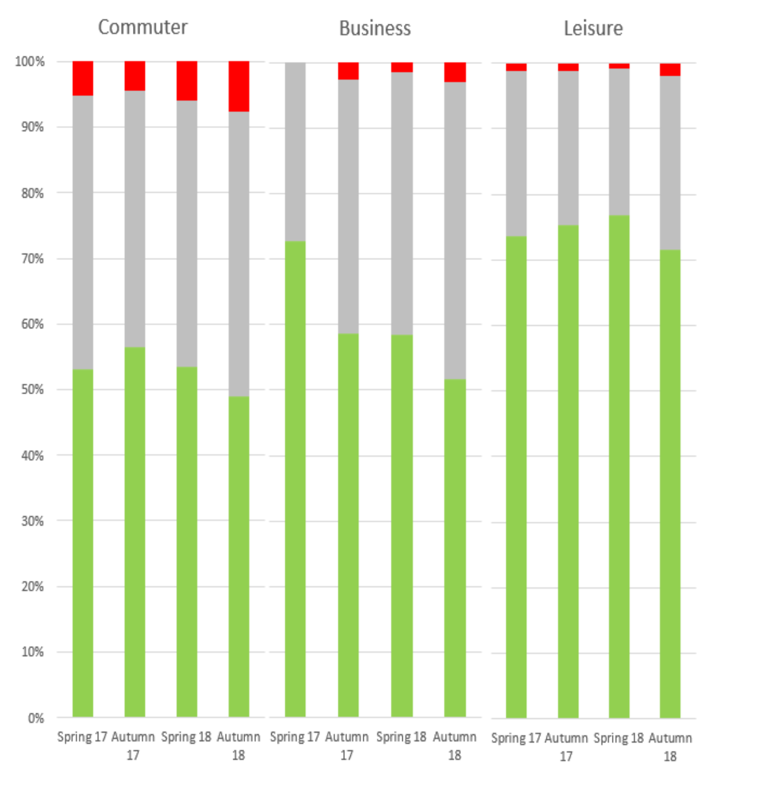




TOC / purpose	Chiltern Railways		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	66	2	59	4	66	1	73	1
A17	65	2	58	3	64	2	72	0
S18	66	2	57	2	67	0	75	2
A18	66	2	59	3	68	1	71	1
A18 sample			417		154		402	

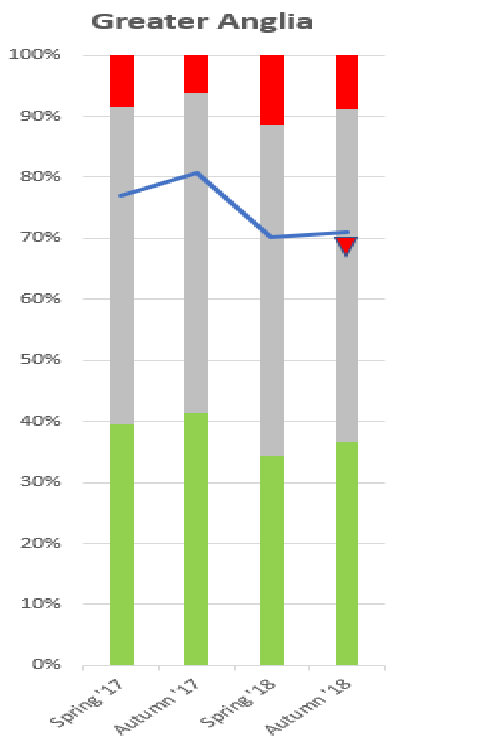
C2C - London and South East Operator

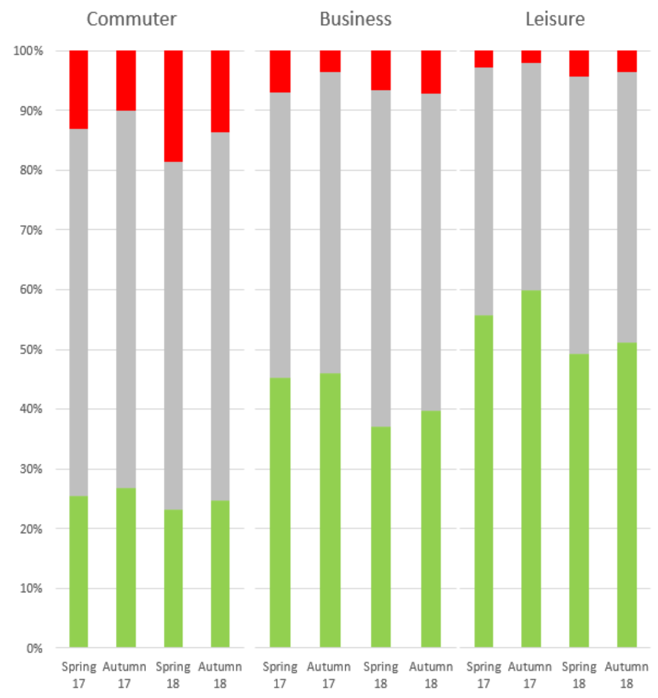




TOC / purpose	C2C		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	60	4	53	5	73	0	74	1
A17	62	3	56	4	59	3	75	1
S18	60	4	54	6	58	1	77	1
A18	55	6	49	8	52	3	72	2
A18 sample			548		49		306	

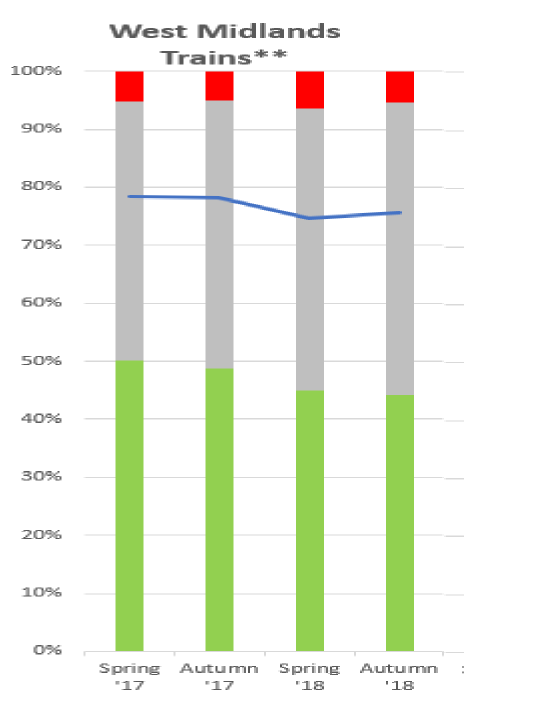
Greater Anglia - London and South East Operator

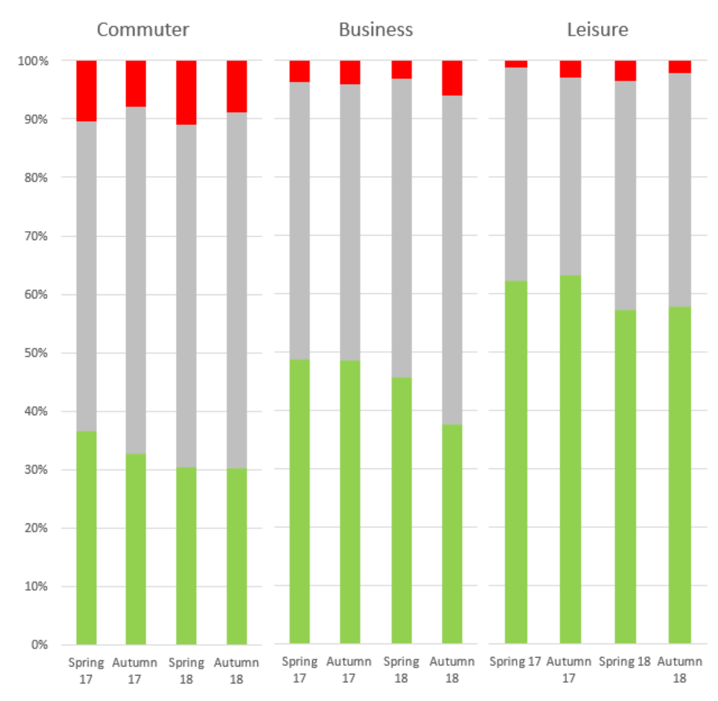




TOC / purpose	Greater Anglia		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	39	8	26	13	45	7	56	3
A17	41	6	27	10	46	4	60	2
S18	34	11	23	18	37	7	49	4
A18	37	9	25	14	40	7	51	4
A18 sample			645		147		614	

West Midlands Trains – London and South East Operator

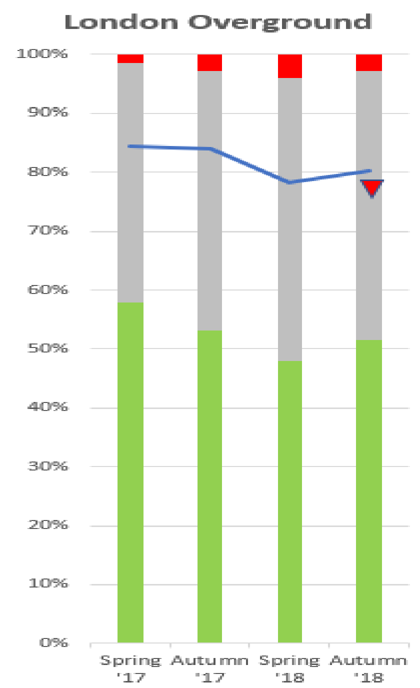


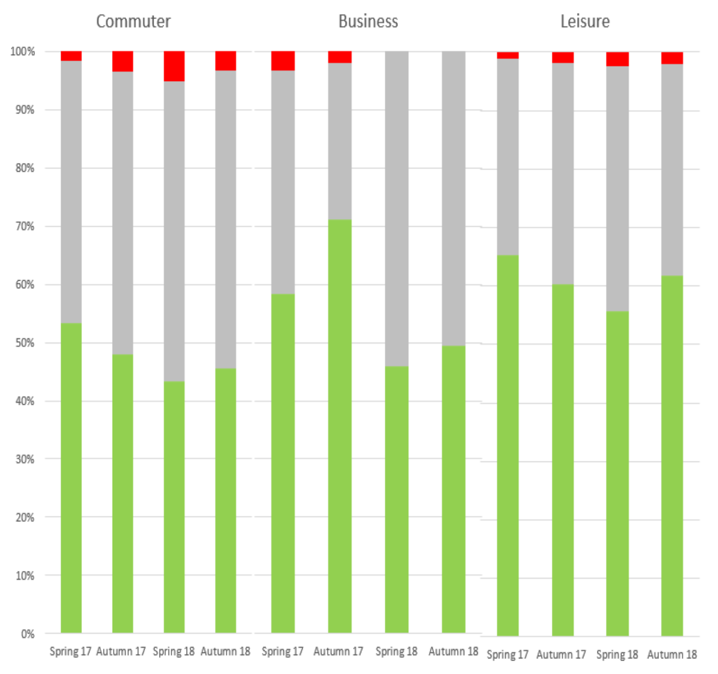


TOC / purpose	West Midlands Trains		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	50	5	37	10	49	4	62	1
A17	49	5	33	8	49	4	63	3
S18	45	6	30	11	46	3	57	3
A18	44	5	30	9	38	6	58	2
A18 sample			418		106		428	

**West Midlands Trains rebranded from London Midland on 10 December 2017.

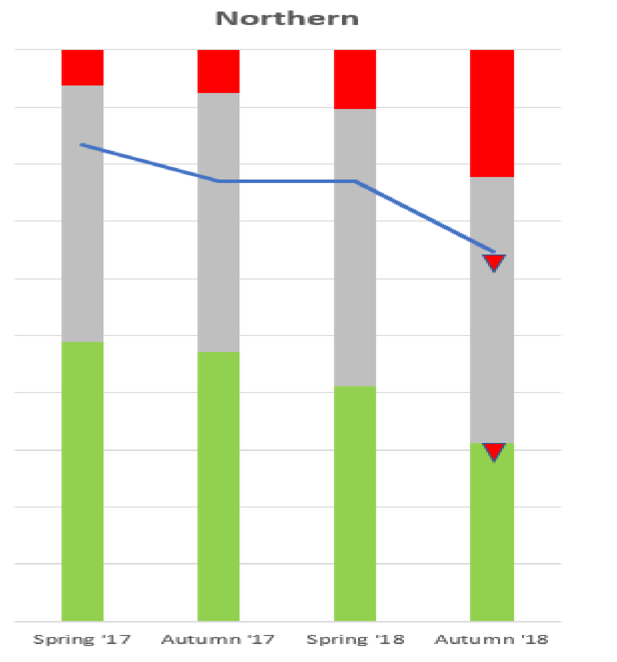
London Overground - London and South East Operator

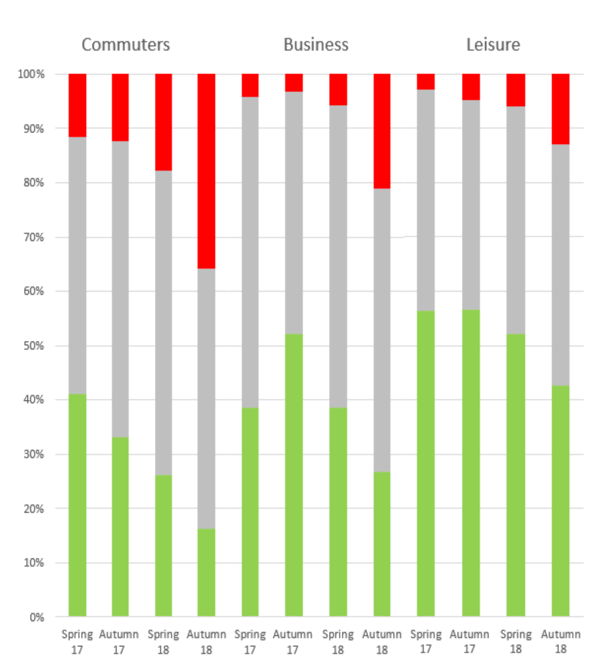




TOC / purpose	London Overground		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	58	1	53	2	58	3	65	1
A17	53	3	48	4	71	2	60	2
S18	48	4	43	5	46	0	56	2
A18	52	3	45	3	49	0	62	2
A18 sample			848		74		576	

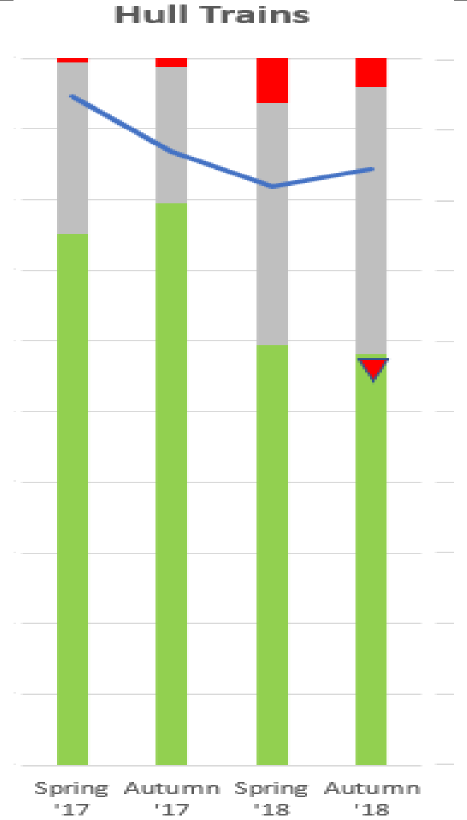
Northern - Regional Operator

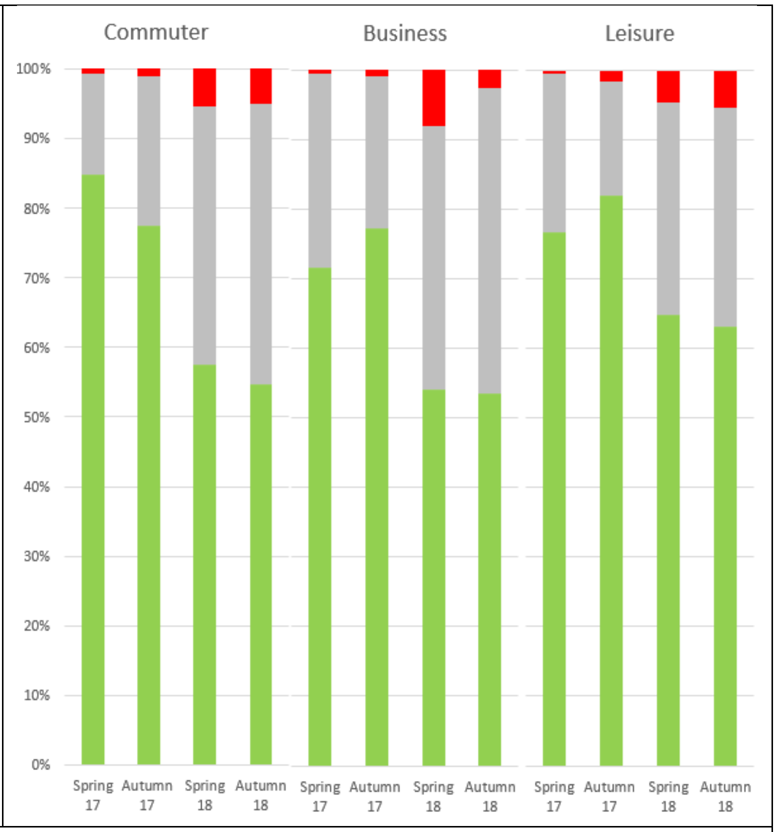




TOC / purpose	Northern		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	49	6	41	11	39	4	56	3
A17	47	8	33	12	52	3	57	5
S18	41	10	26	18	39	6	52	6
A18	31	22	16	36	27	21	43	13
A18 sample			561		118		597	

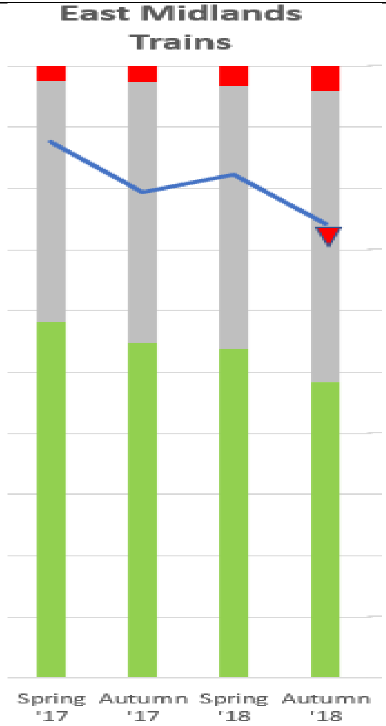
Hull Trains – Long Distance Open Access Operator

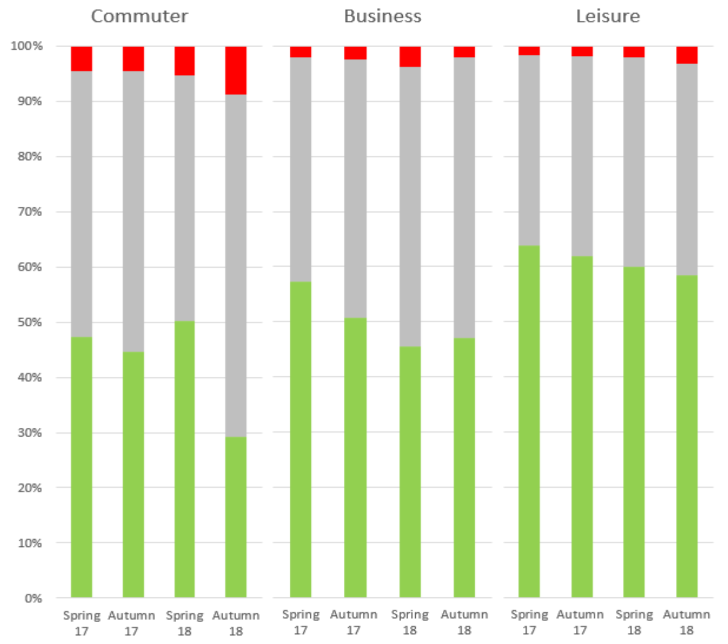




TOC / purpose	Hull Trains		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	75	1	85	1	72	1	77	0
A17	79	1	77	1	77	1	82	1
S18	59	6	57	5	54	8	65	5
A18	58	4	55	5	54	3	63	5
A18 sample			75		120		260	

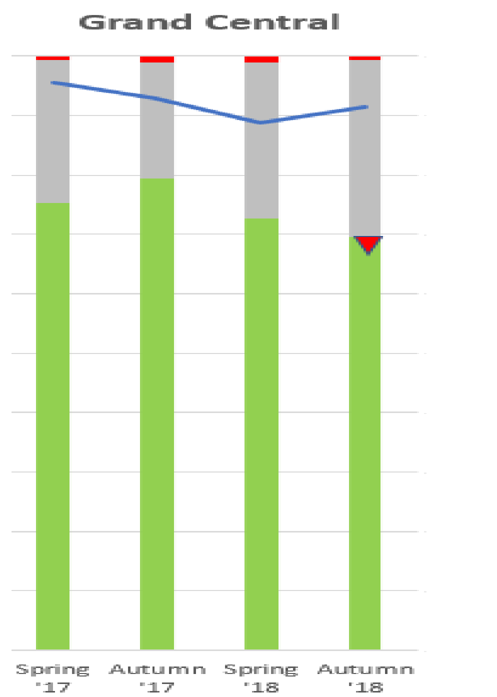
East Midlands Trains – Long Distance Operator

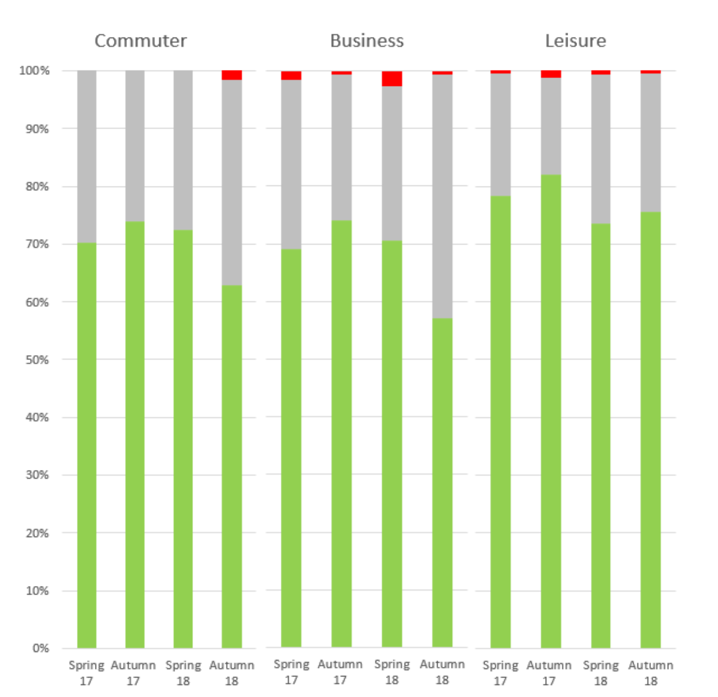




TOC / purpose	East Midlands Trains		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	58	2	47	5	57	2	64	2
A17	55	3	45	5	51	2	62	2
S18	54	3	50	5	46	4	60	2
A18	49	4	29	9	47	2	58	3
A18 sample			321		144		404	

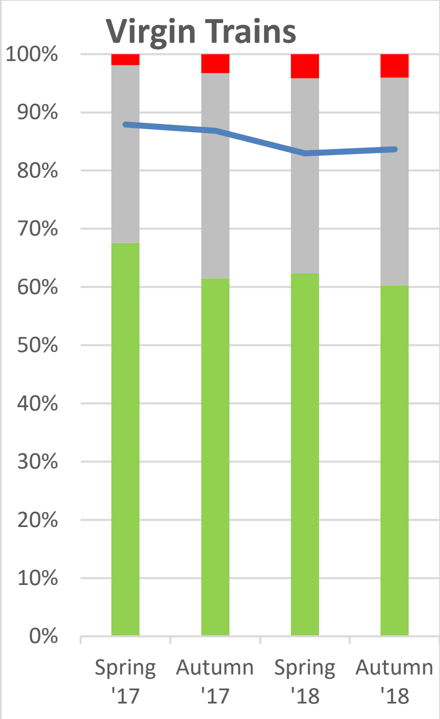
Grand Central – Long Distance Open Access Operator

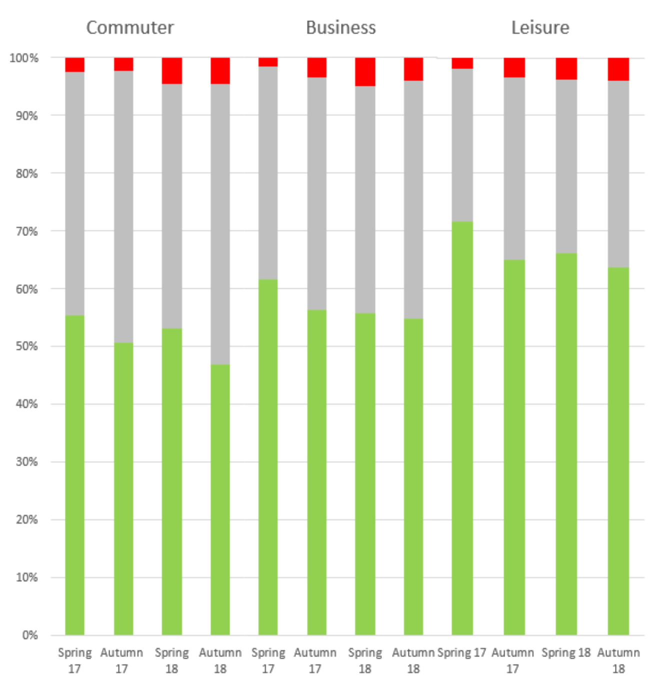




TOC / purpose	Grand Central		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	75	1	70	0	69	2	78	0
A17	79	1	74	0	74	1	82	1
S18	73	1	72	0	71	3	74	1
A18	70	1	63	2	57	1	76	1
A18 sample			72		83		299	

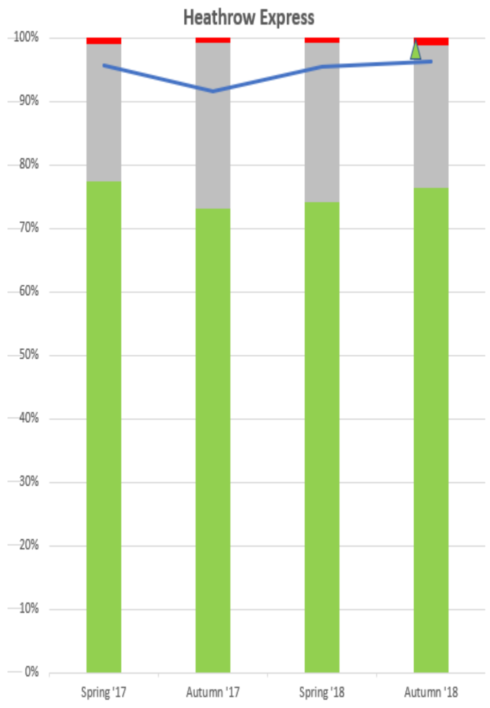
Virgin Trains – Long Distance Operator

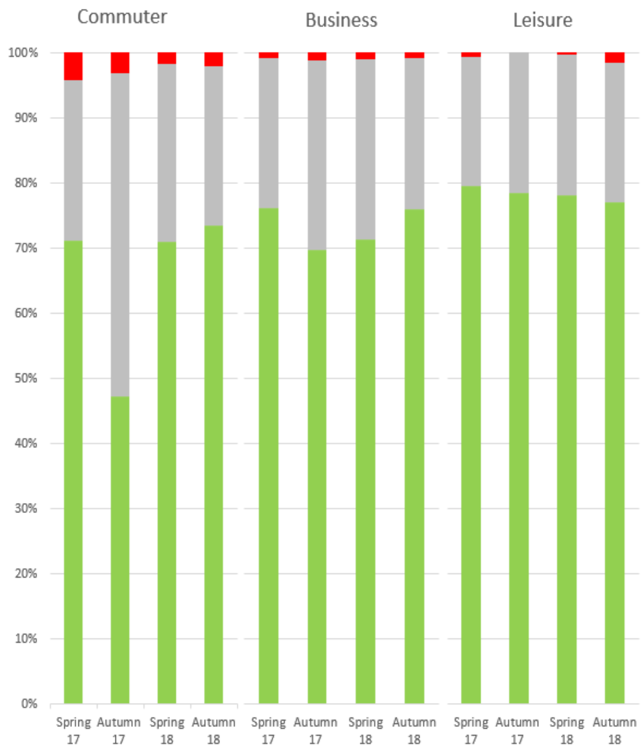




TOC / purpose	Virgin Trains		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	68	2	55	2	62	2	72	2
A17	62	3	51	2	56	3	65	3
S18	62	4	53	5	56	5	66	4
A18	60	4	47	5	55	4	64	4
A18 sample			231		328		470	

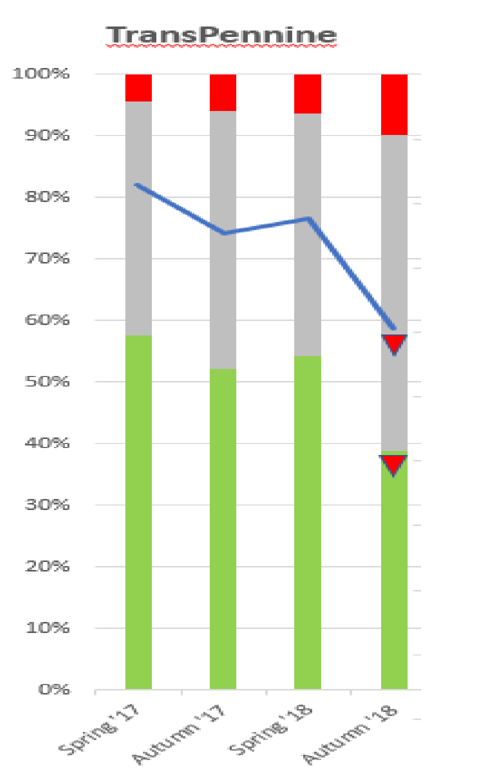
Heathrow Express- London and South East Airport Operator

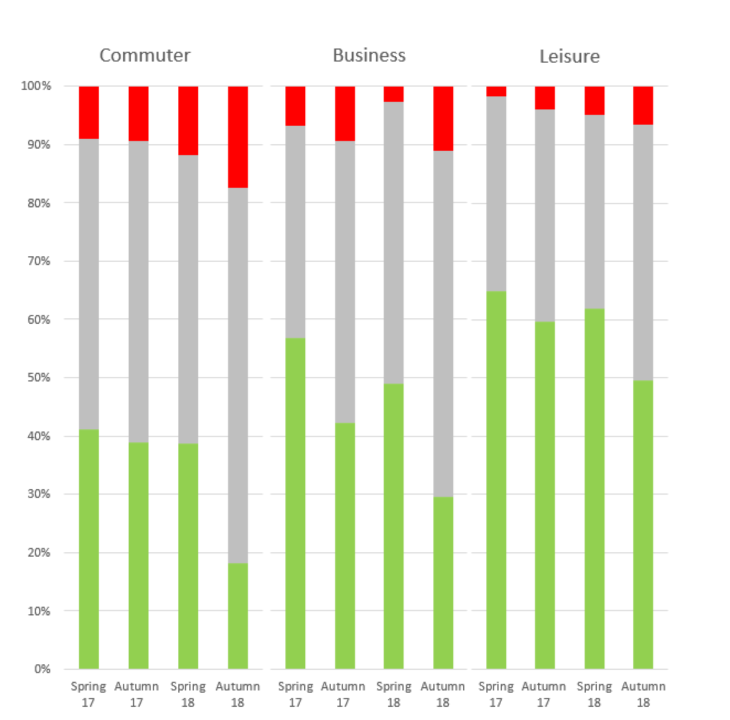




TOC / purpose	Heathrow Express		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	78	1	71	4	76	1	80	1
A17	73	1	47	3	70	1	79	0
S18	74	1	71	2	71	1	78	0
A18	76	1	74	2	76	1	77	2
A18 sample			89		272		246	

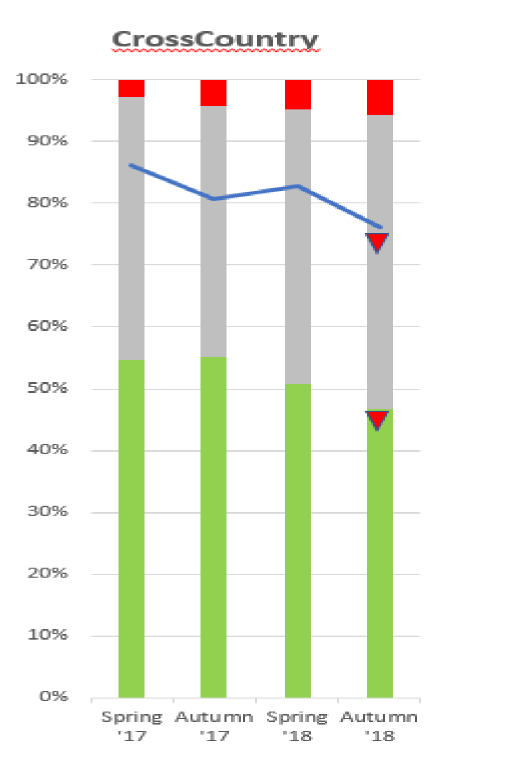
TransPennine Express – Long Distance Operator

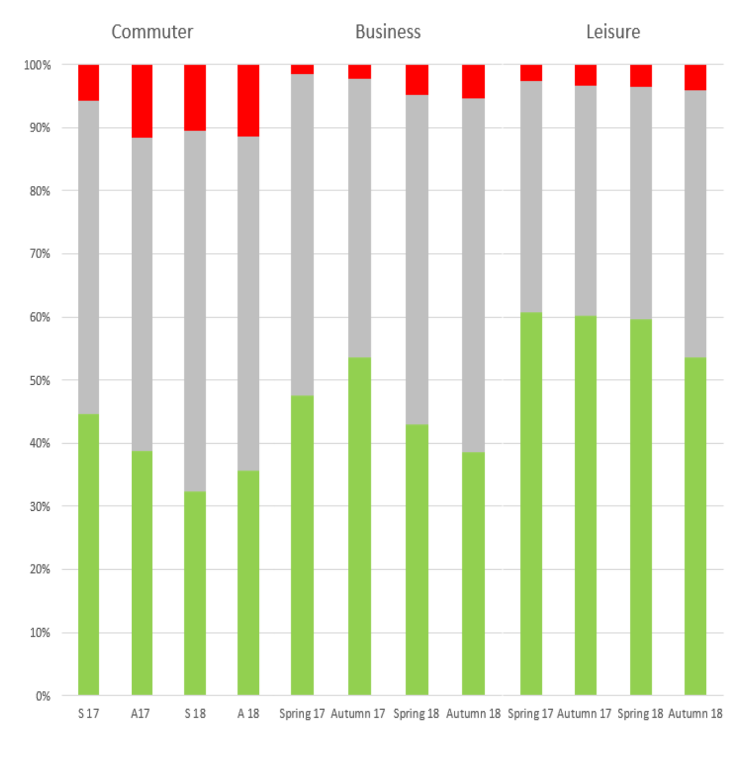




TOC / purpose	TransPennine Express		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	58	4	41	9	57	7	65	2
A17	52	6	39	9	42	9	60	4
S18	54	6	39	12	49	3	62	5
A18	39	10	18	17	30	11	50	6
A18 sample			277		143		340	

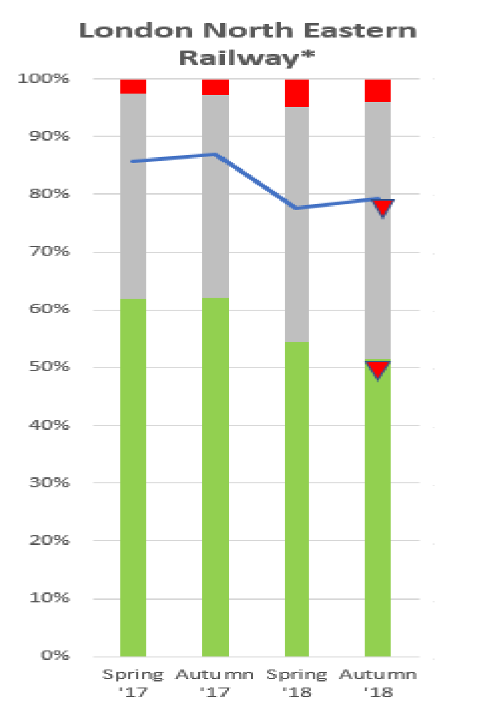
CrossCountry – Long Distance Operator

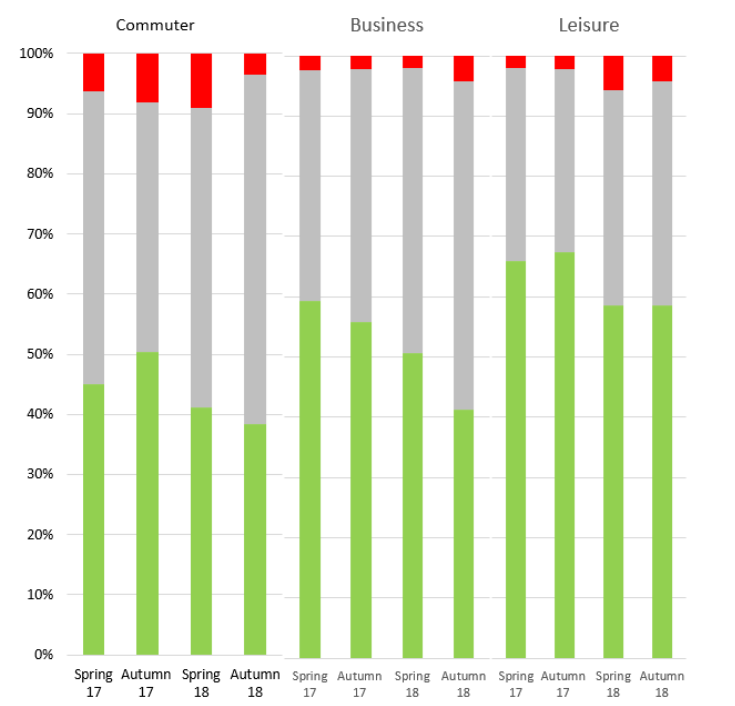




TOC / purpose	CrossCountry		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	55	3	45	6	48	1	61	3
A17	55	4	39	12	54	2	60	3
S18	51	5	32	10	43	5	60	4
A18	47	6	36	11	39	5	54	4
A18 sample			345		226		605	

London North Eastern Railway – Long Distance Operator

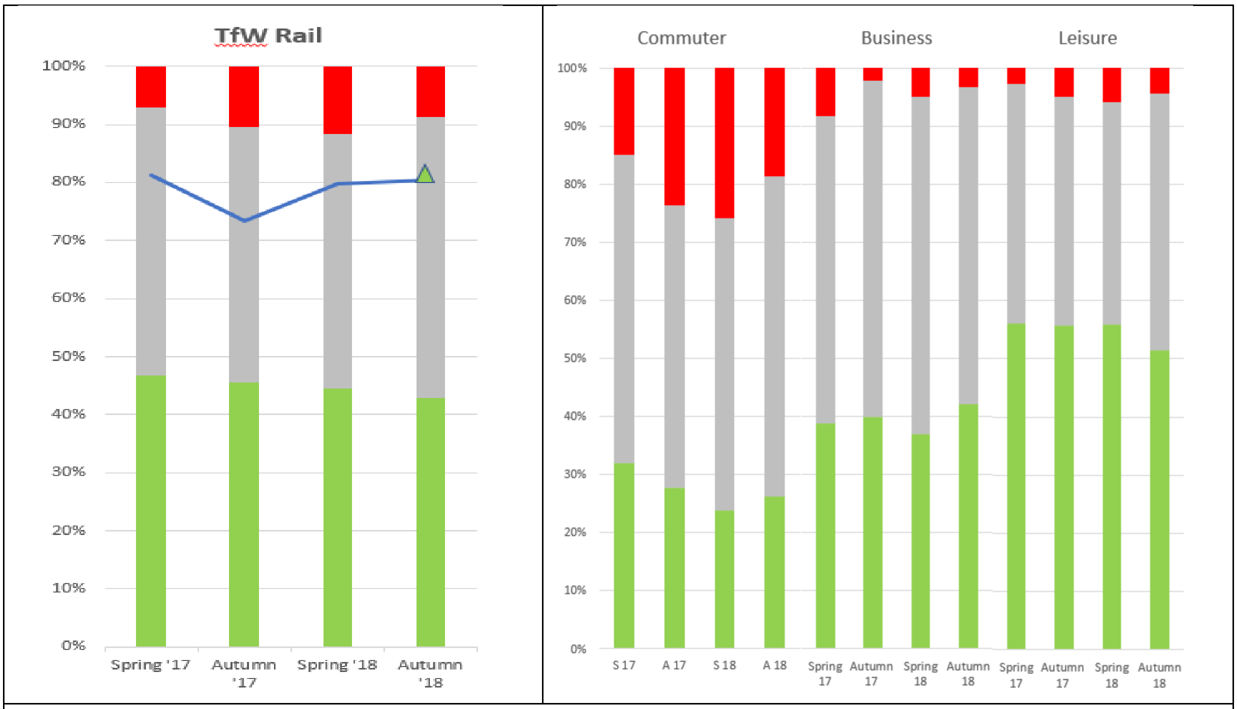




TOC / purpose	London North Eastern Railway		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	62	2	45	6	59	2	66	2
A17	62	3	50	8	56	2	67	2
S18	54	5	41	9	51	2	59	6
A18	51	4	38	4	41	4	59	4
A18 sample			171		299		603	

* LNER rebranded from Virgin Trains East Coast on 21st June 2018

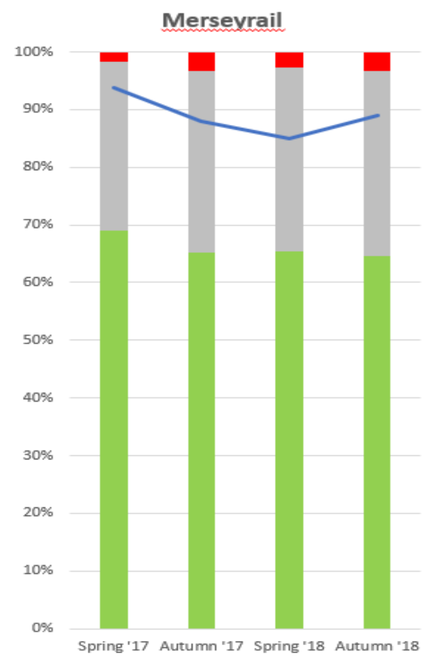
TFW Rail* – Regional Operator

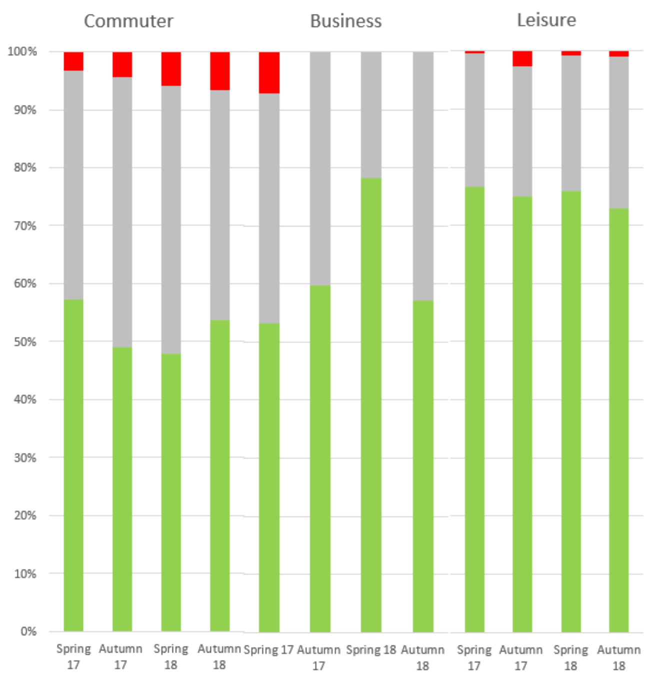


TOC / purpose	TfW Rail		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	47	7	32	15	39	8	56	3
A17	46	10	28	24	40	2	56	5
S18	45	12	24	26	37	5	56	6
A18*	43	9	26	19	42	3	52	4
A18 sample			332		114		491	

*Fieldwork on Arriva Trains Wales only took place up to 13th October as the franchise was under new ownership and rebranded from14th October 2018.

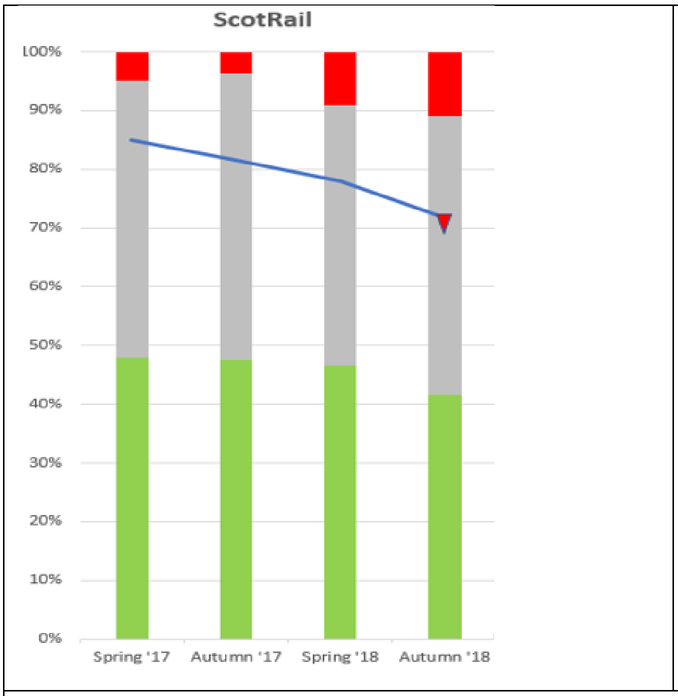
Merseyrail – Regional Operator

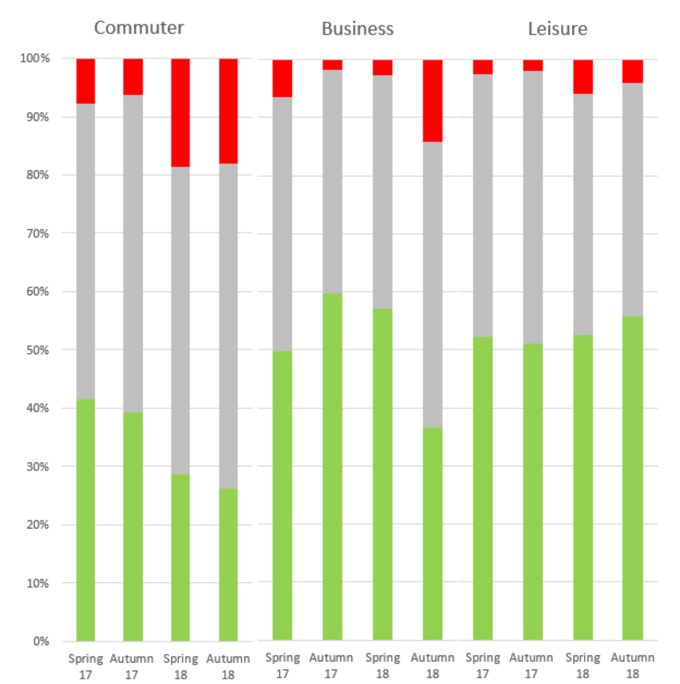




TOC / purpose	Merseyrail		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	69	2	57	3	53	7	77	0
A17	65	3	49	4	60	0	75	3
S18	65	3	48	6	78	0	76	1
A18	65	3	54	7	57	0	73	1
A18 sample			358		17		350	

ScotRail – Regional Operator





TOC / purpose	ScotRail		Commuter		Business		Leisure	
NRPS wave	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
S17	48	5	42	8	50	6	52	2
A17	48	4	39	6	60	2	51	2
S18	47	9	29	19	57	3	53	6
A18	42	11	26	18	37	14	56	4
A18 sample			536		134		539	

TfL Rail – London and South East Operator

Data for TfL Rail is not included here as the former Heathrow Connect stopping service London Paddington – Heathrow was incorporated into the operation from Autumn 2018 survey. As TOC boundary significantly changed it cannot be compared with previous waves.

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