

How are train operators scoring on trust? National Rail Passenger Survey Spring 2019

An update to: *Trust in train operators: an exploration of issues influencing passenger trust in rail*, May 2019¹

Five waves of National Rail Passenger Survey (NRPS) tracking show considerable variation in the trust scores achieved by individual train operating companies² (see Table 1 - Spring 2019 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. In some places, passengers continue to bear 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 performer in Spring 2019 is Heathrow Express, which has consistently achieved trust scores of 70 per cent and above in the five waves tracked.

Grand Central has dropped to 64 per cent from scores previously of 70 per cent and above. Chiltern, Merseyrail and Virgin Trains continue to maintain trust scores of 60 per cent and above.

Two operators have recorded statistically significant improvements in trust between Spring 2018 and Spring 2019. Both Southern and Great Western Railway are up ten percentage points. Southern to 28 per cent and Great Western to 53 per cent.

Statistically significant falls in trust have been recorded for Northern and TransPennine Express. TransPennine Express has dropped 11 percentage points to 43 per cent and Northern has fallen from 41 to 35 per cent.

The lowest score for trust in Spring 2019 is for Great Northern, on 27 per cent. South Western Railway and Southeastern also have scores of just 31 and 32 per cent respectively.

It is also instructive to consider the proportion of passengers who state they 'do not trust' the operator they travelled with. In Spring 2019 seven operators have ten per cent or more of their passengers recording a lack of trust. These are Northern (16 per cent), Great Northern (15 per cent), Southern and South Western Railway (both at 14 per cent), Thameslink (12 per cent), Gatwick Express (11 per cent) and Southeastern (10 per cent).

¹<https://www.transportfocus.org.uk/research-publications/publications/williams-rail-review-trust-in-train-operators-an-exploration-of-issues-influencing-passenger-trust-in-rail/>

²Trust 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.

Table 1: percentage of passengers expressing trust or not - Spring 2019

NRPS wave	Spring 2019		Autumn 2018		Spring 2018		Autumn 2017		Spring 2017	
	Trust	Do not trust	Trust	Do not trust	Trust	Do not trust	Trust	Do not trust	Trust	Do not trust
London and South East operators										
c2c	54	5	55	6	60	4	62	3	60	4
Chiltern	69	3	66	2	66	2	65	2	66	2
Gatwick Express	47	11	46	9	44	9	50	11	49	9
Great Northern	27	15	24	22	32	10	35	7	30	6
Great Western Railway	53	6	44	9	43	7	44	8	46	6
Greater Anglia	40	9	37	9	34	11	41	6	39	8
Heathrow Express	73	2	76	1	74	1	73	1	78	1
London Overground	50	4	52	3	48	4	53	3	58	1
South Western Railway	31	14	27	15	31	11	33	10	47	5
Southeastern	32	10	31	11	33	15	32	10	35	10
Southern	28	14	22	23	18	28	17	30	17	39
TfL Rail	53	5	50	5	Data from previous waves not comparable					
Thameslink	36	12	27	21	39	9	31	13	28	16
West Midlands Trains	48	4	44	5	45	6	49	5	50	5
Long-distance operators										
CrossCountry	53	4	47	6	51	5	55	4	55	3
East Midlands Trains	51	5	49	4	54	3	55	3	58	2
Grand Central	64	3	70	1	73	1	79	1	75	1
Hull Trains	58	5	58	4	59	6	79	1	75	1
London North Eastern Railway	57	2	51	4	54	5	62	3	62	2
TransPennine Express	43	7	39	10	54	6	52	6	58	4
Virgin Trains	63	2	60	4	62	4	62	3	68	2
Regional operators										
TFW Rail	39	9	43	9	45	12	46	10	47	7
Merseyrail	64	3	65	3	65	3	65	3	69	2
Northern	35	16	31	22	41	10	47	8	49	6
ScotRail	41	13	42	11	47	9	48	4	48	5



Appendix 1 - train operator trust scores - Spring 2019

Introduction and key to charts

This appendix contains charts to illustrate the range of trust scores for individual train operators over the five National Rail Passenger Survey (NRPS) waves between Spring 2017 and Spring 2019.

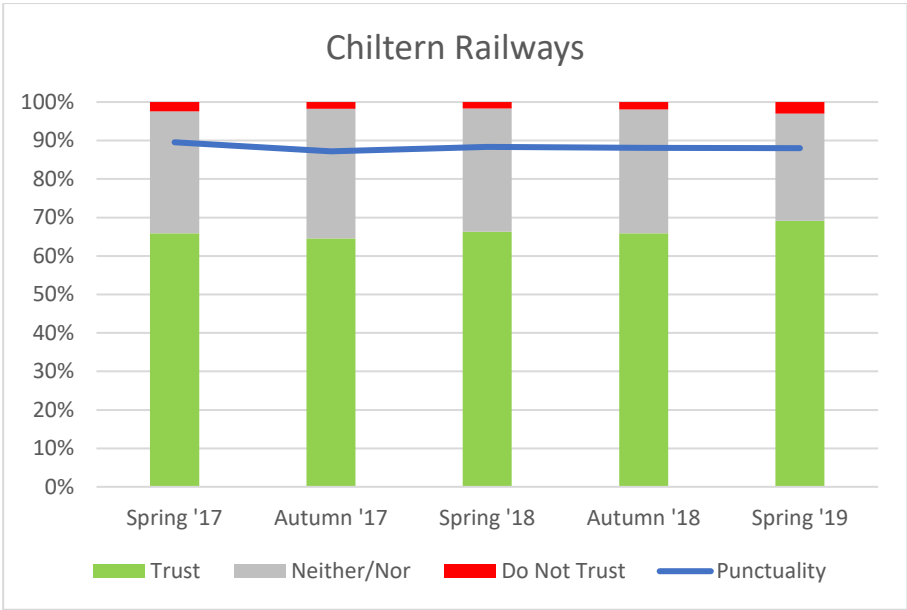
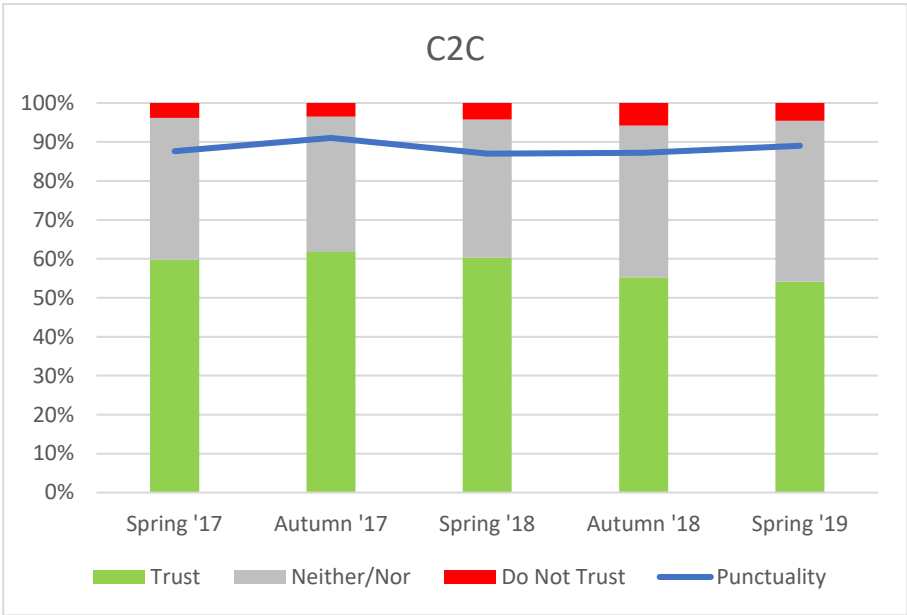
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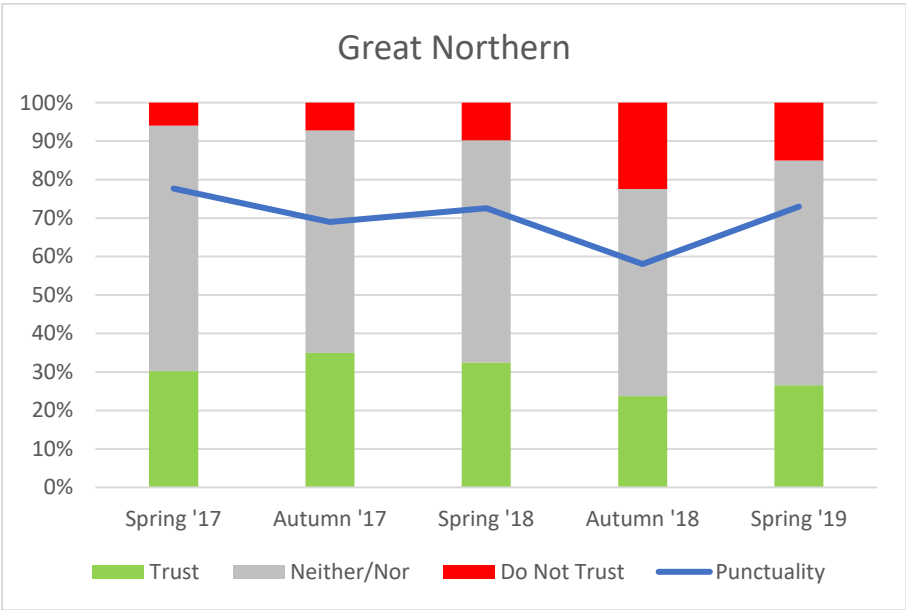
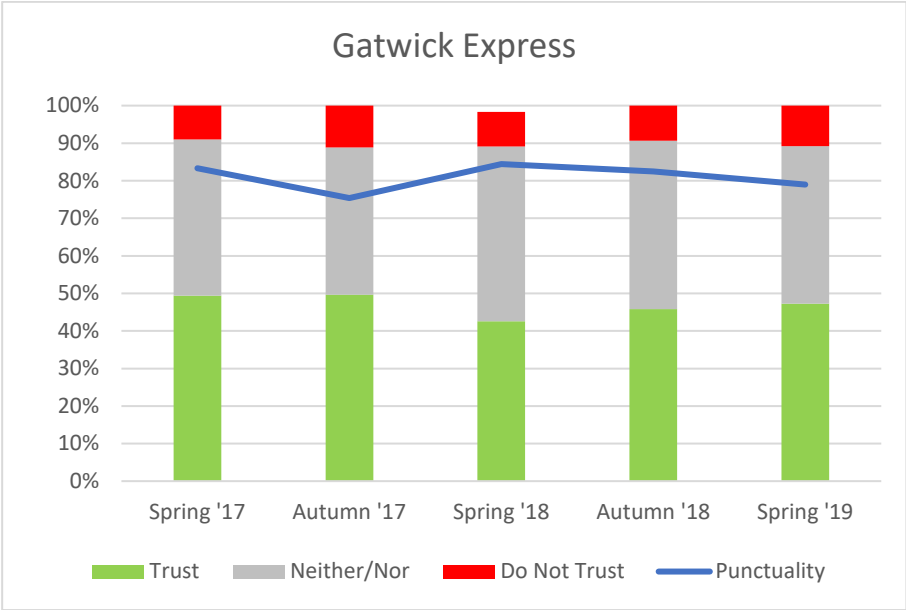
■ Trust
 ■ Neither/Nor
 ■ Do Not Trust
 — Punctuality

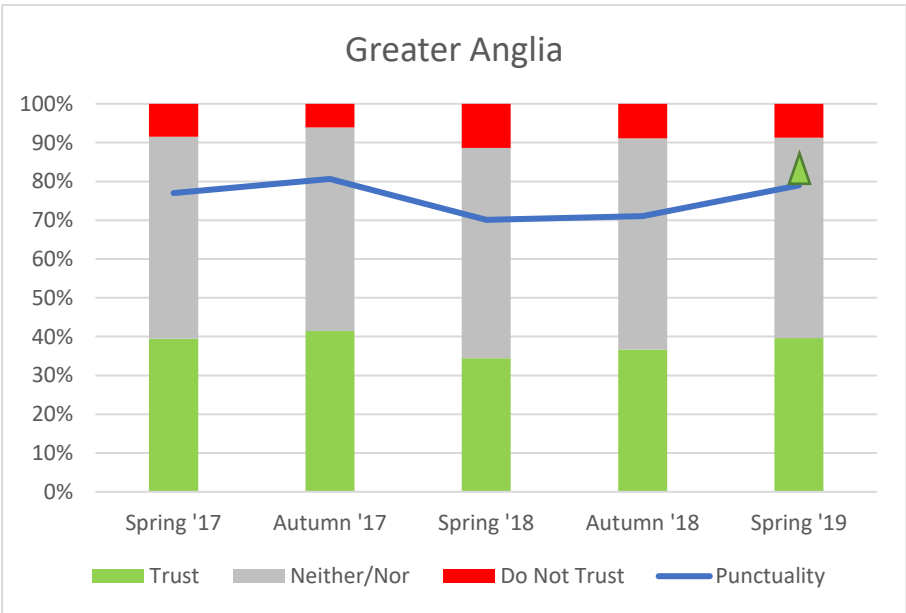
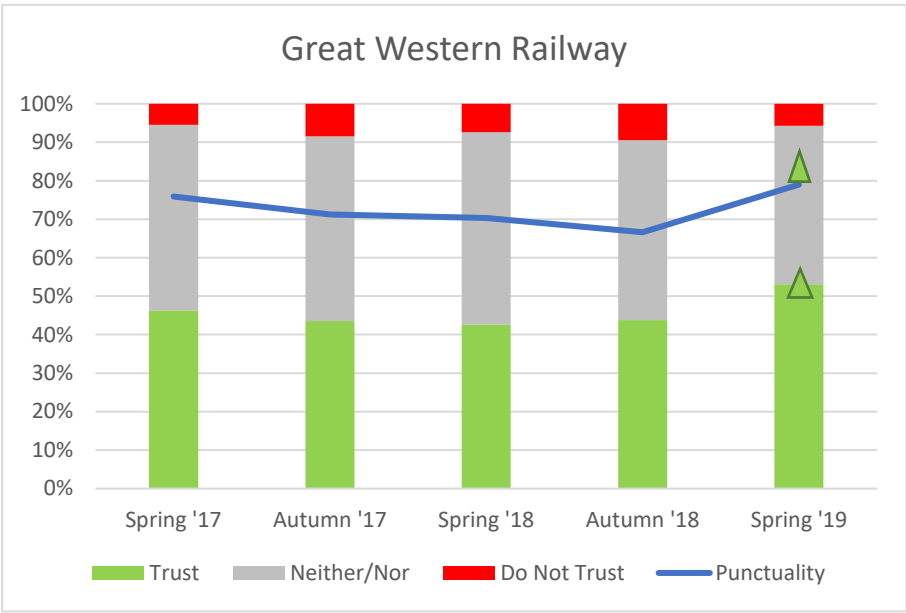
	Indicates statistically significant increase since Spring 2018
	Indicates statistically significant decrease since Spring 2018

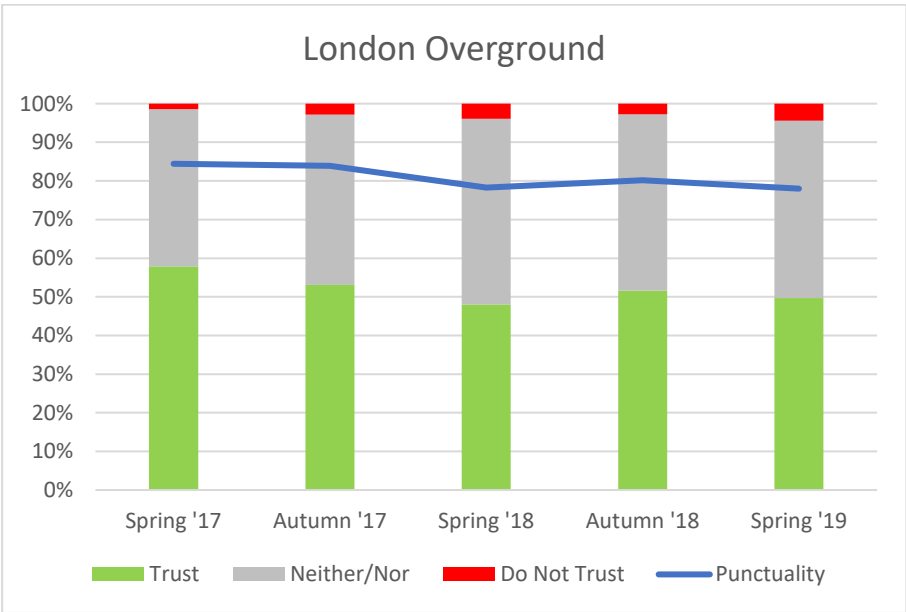
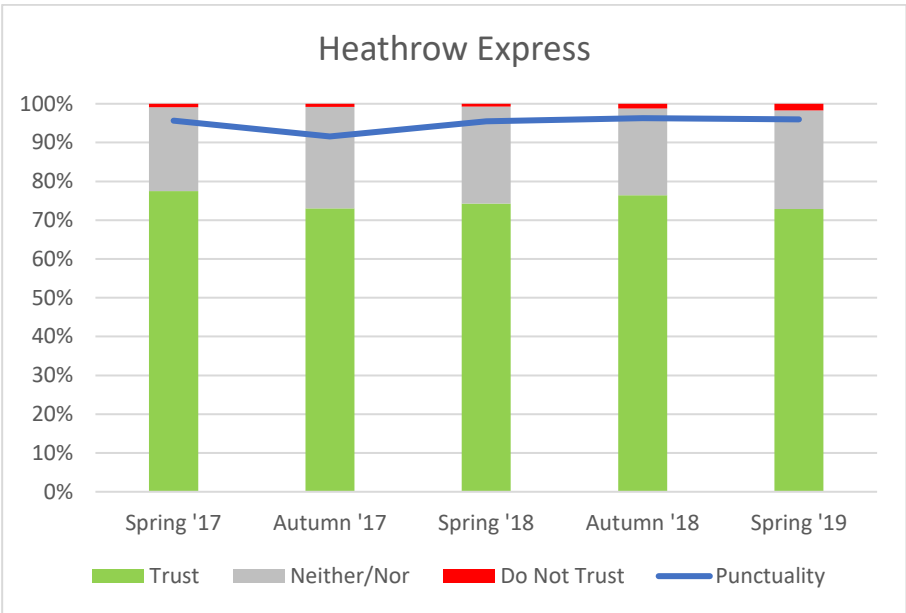
Scores are shown as percentages and data is rounded to nearest whole number. Charts show train operating company trust scores alongside satisfaction with punctuality and reliability.

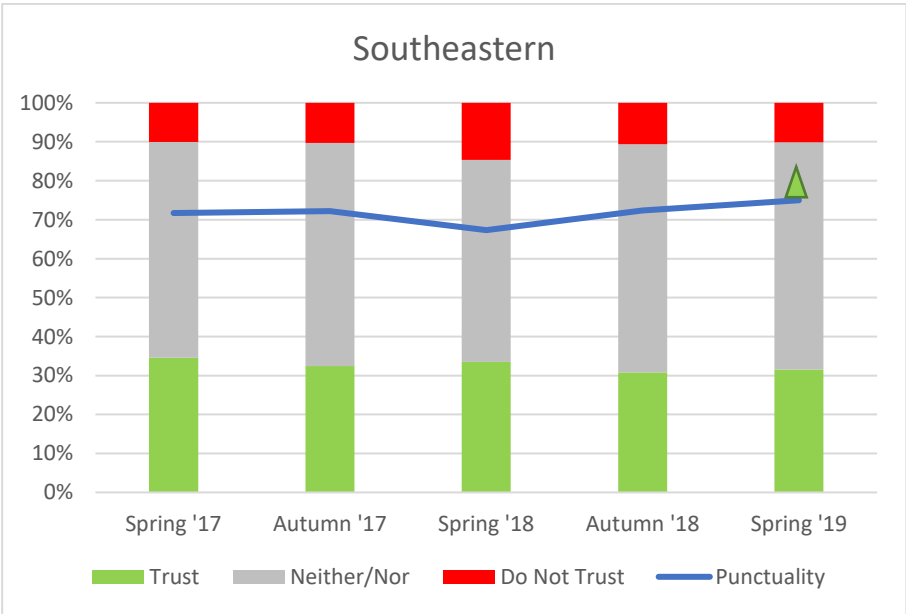
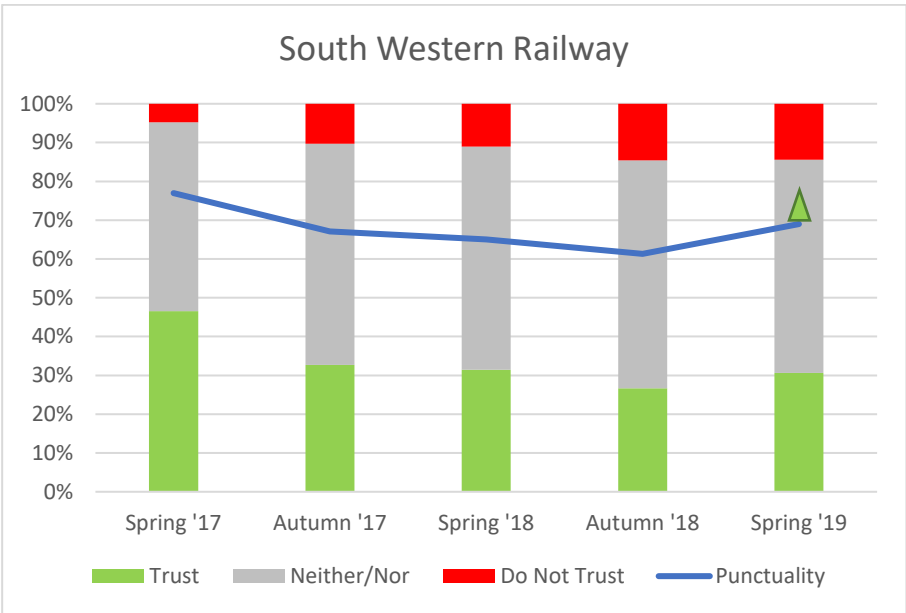
London and South East operators

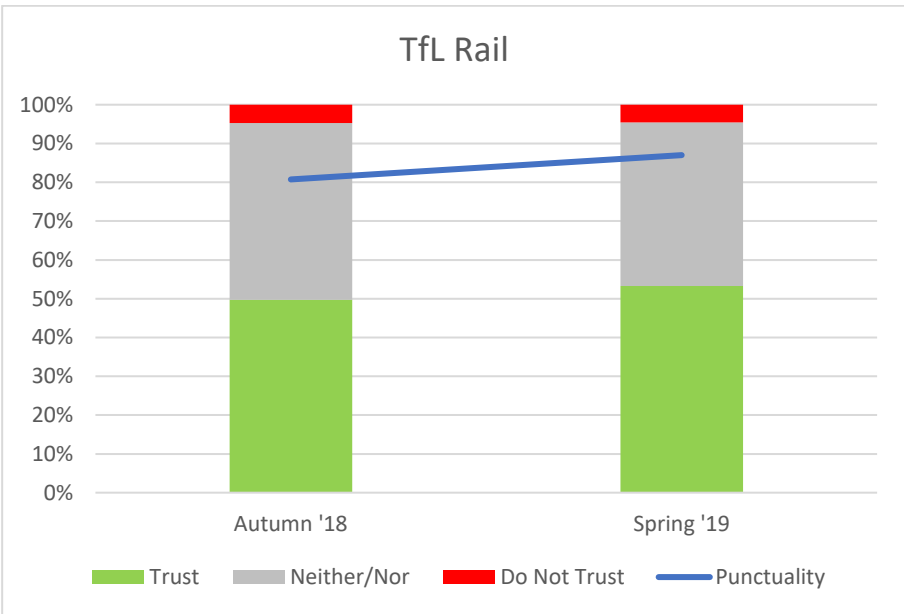
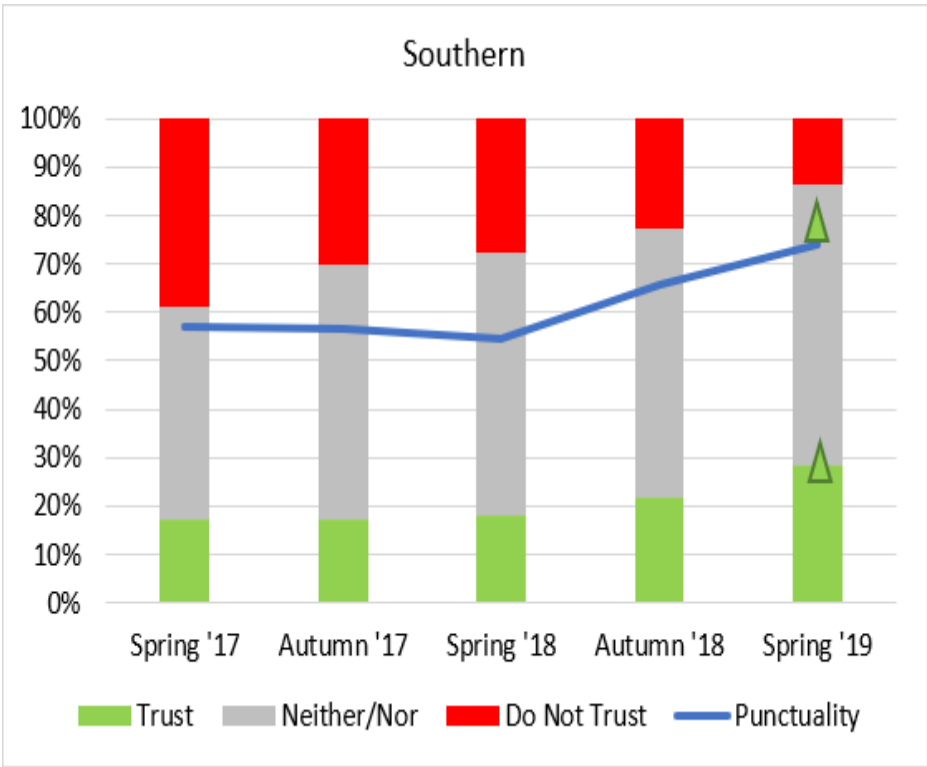




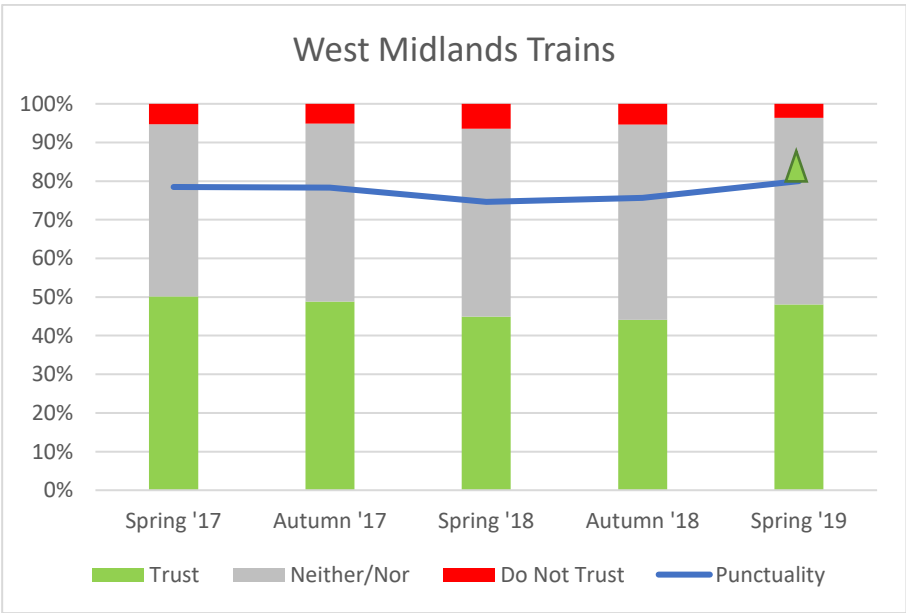
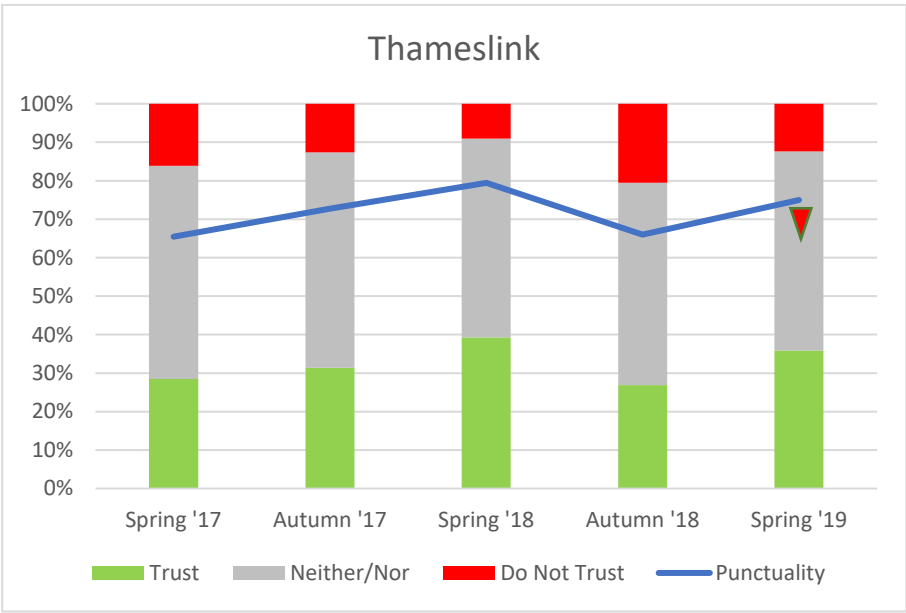




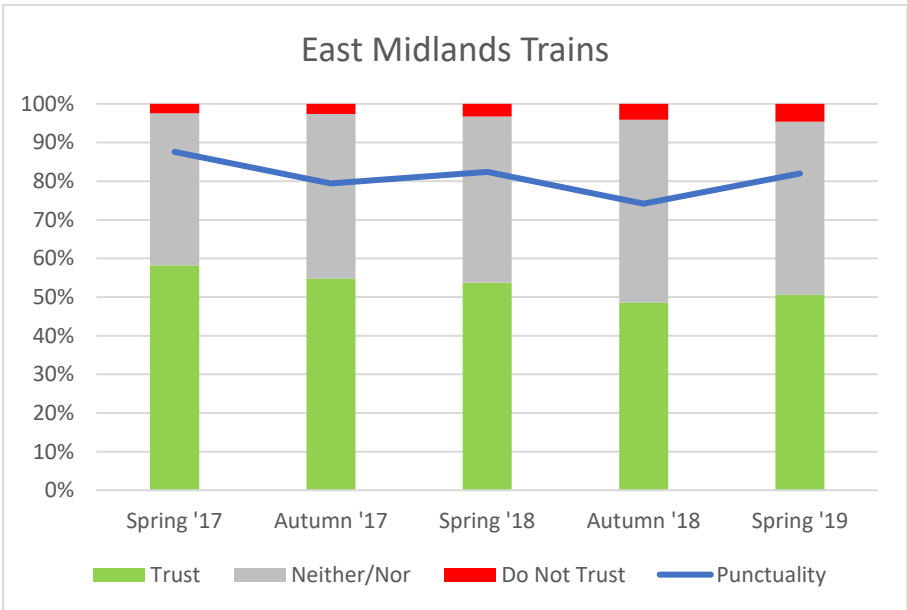
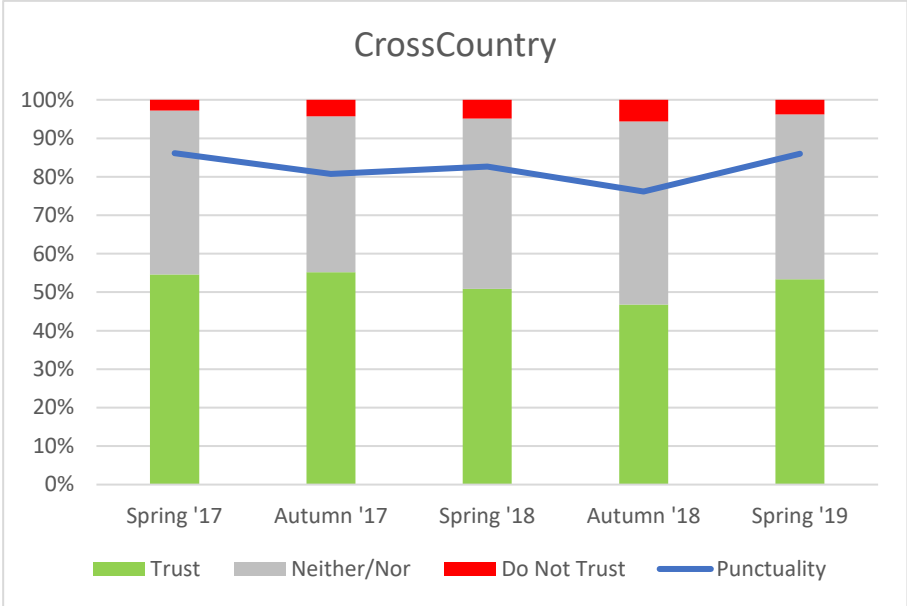


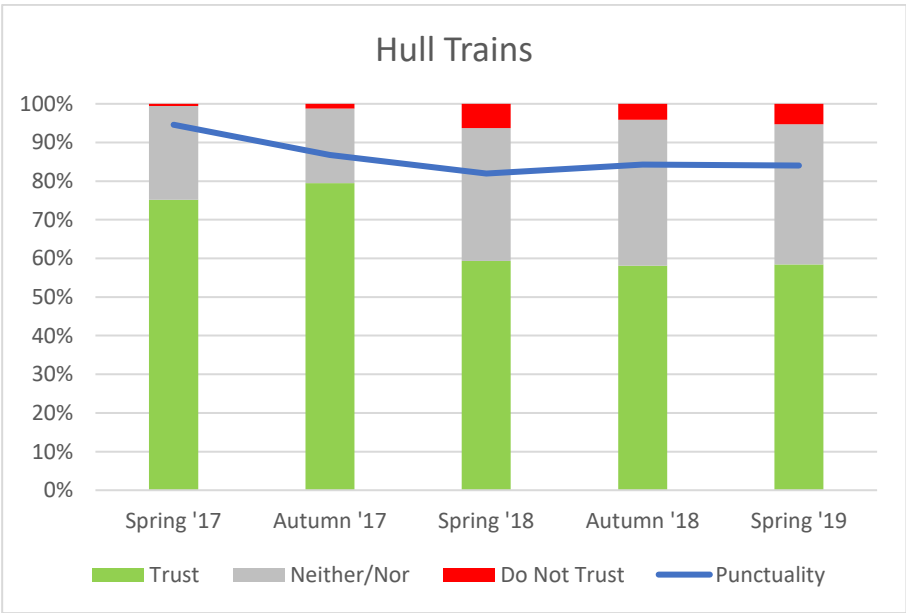
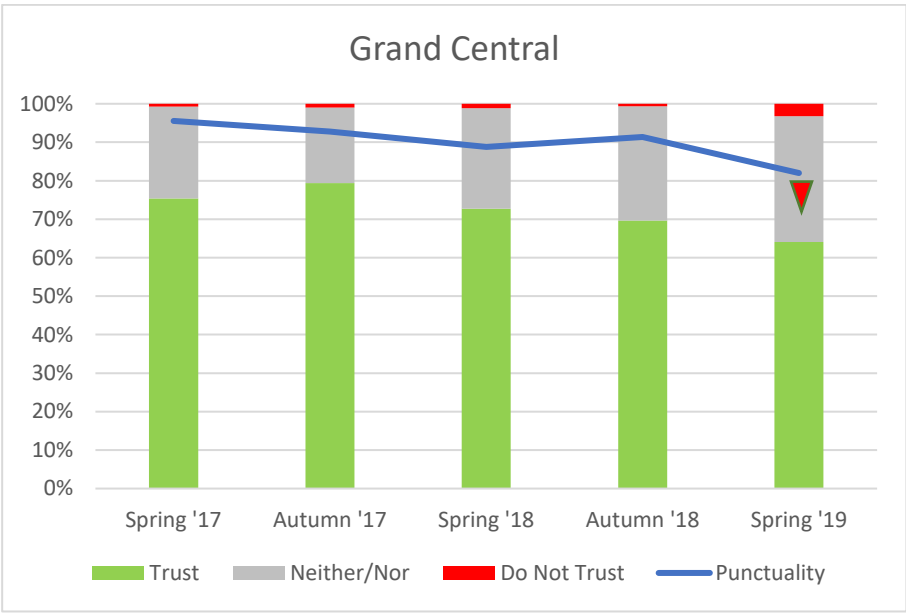


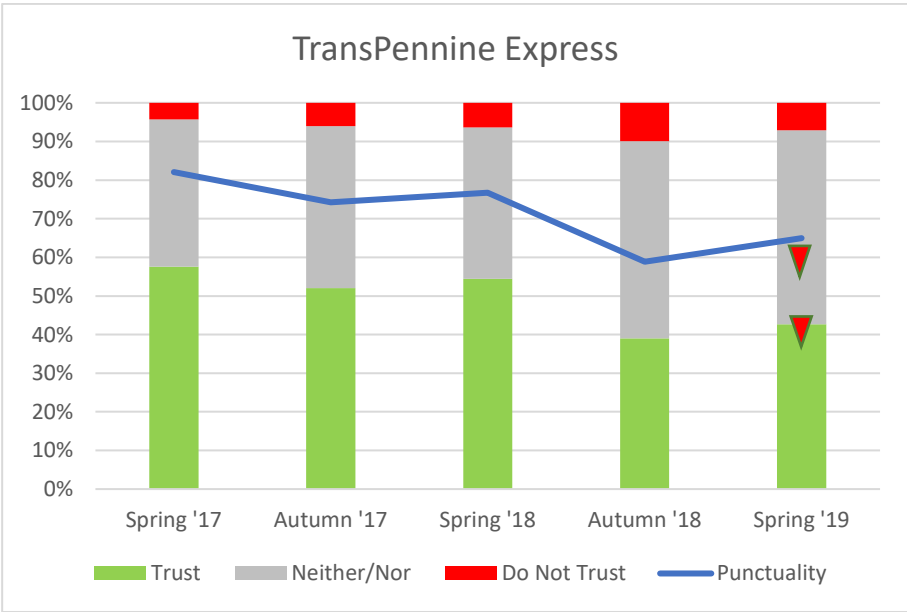
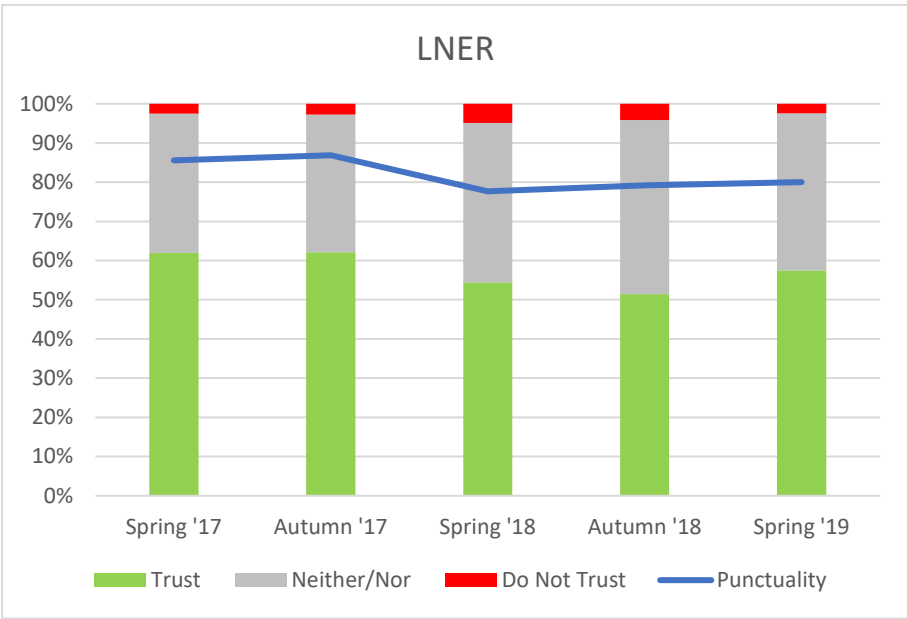
Note: Only two waves of data for TfL Rail is available, as the former Heathrow Connect stopping service, London Paddington – Heathrow, was incorporated into the operation from Autumn 2018 survey. As TOC boundary is significantly changed it cannot be compared with prior waves.

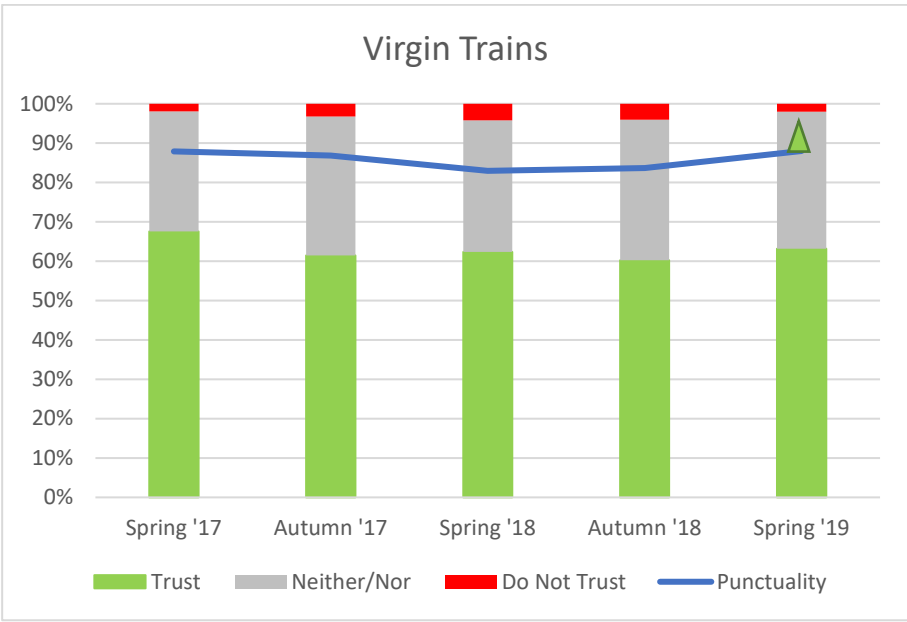


Long distance operators

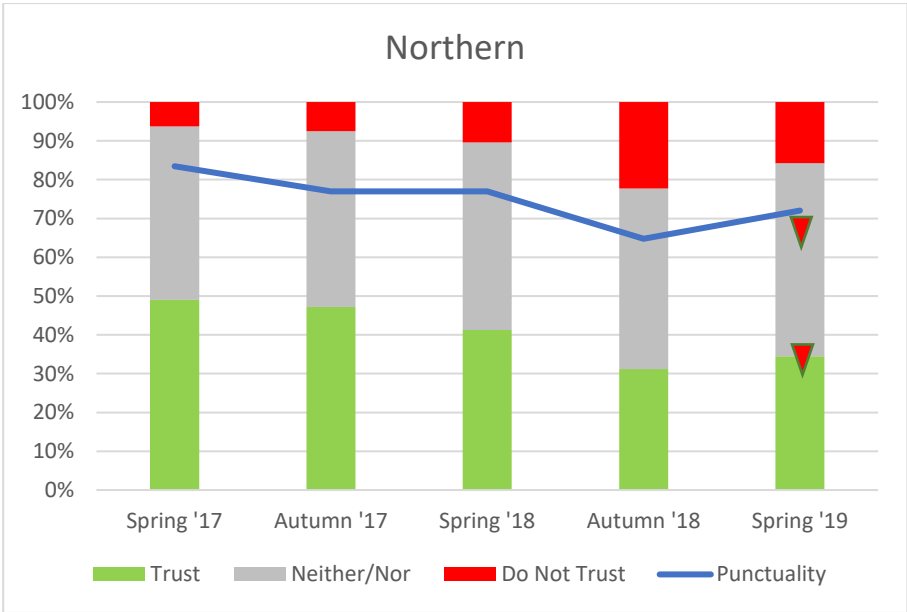
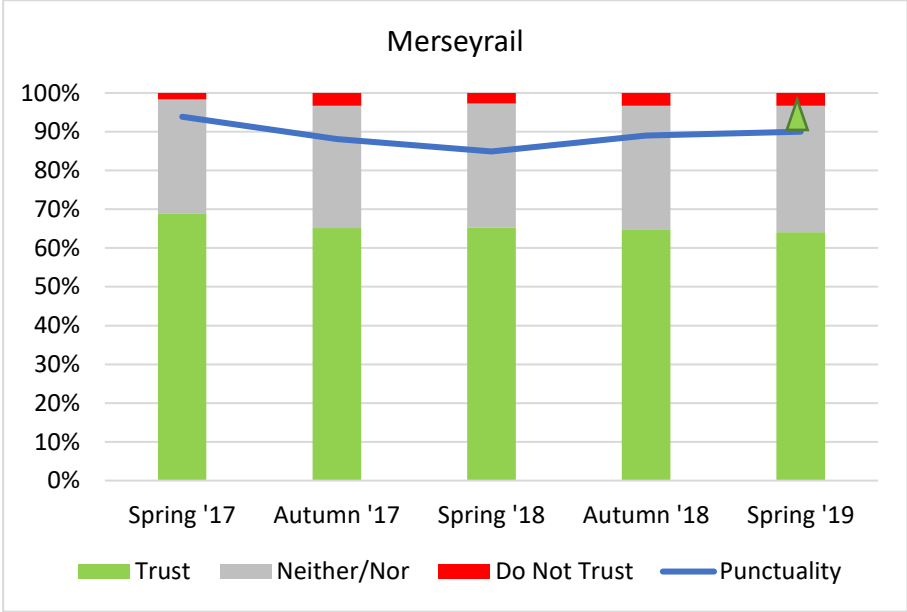


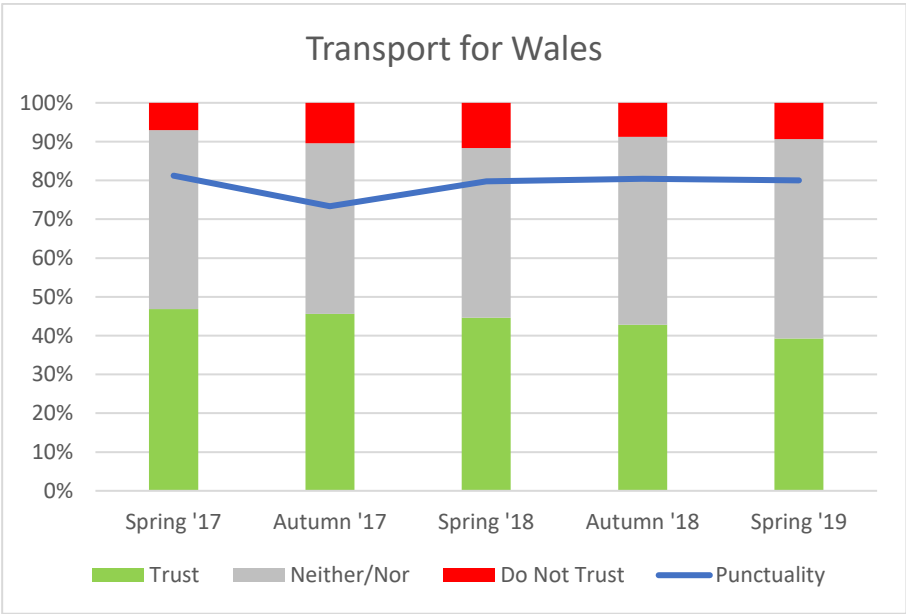
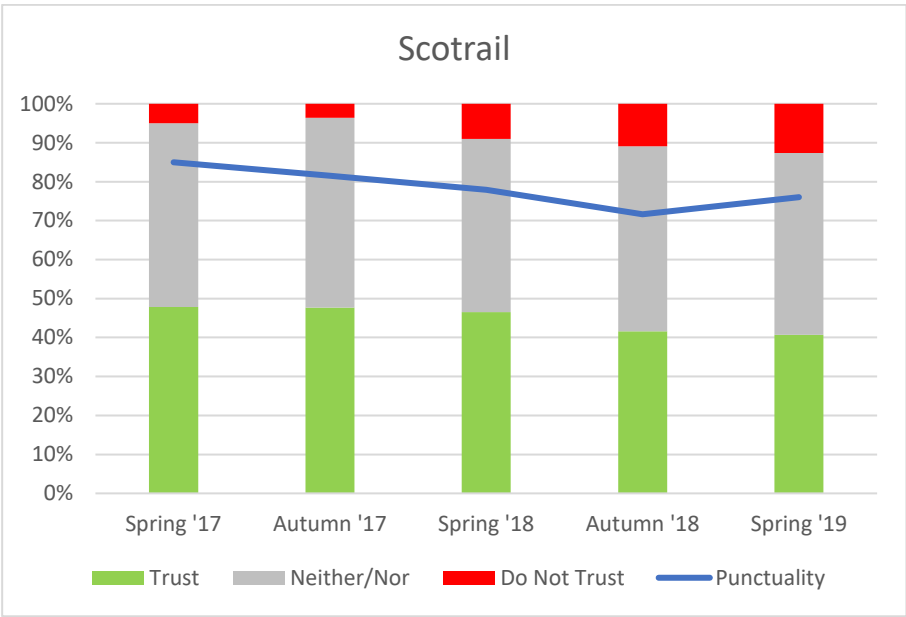






Regional Operators





Appendix 2 - Commuter/Business/Leisure scores - Spring 2019

London and South East operators

C2C

TOC / purpose	C2C		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	54	5	48	6	70	0	67	2
S19 sample			654		48		357	

Chiltern

TOC / purpose	Chiltern Railways		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	69	3	61	5	71	3	76	1
S19 sample			403		149		404	

Gatwick Express

TOC / purpose	Gatwick Express		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	47	11	35	27	45	11	56	4
S19 sample			154		98		174	

Great Northern

TOC / purpose	Great Northern		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	27	15	15	21	33	9	41	8
S19 sample			241		76		252	

Greater Anglia

TOC / purpose	Greater Anglia		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	40	9	27	13	46	4	51	7
S19 sample			662		205		637	

Great Western Railway

TOC / purpose	Great Western Railway		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	53	6	38	9	51	6	61	4
S19 sample			669		233		704	

Heathrow Express

TOC / purpose	Heathrow Express		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	73	2	64	1	68	2	78	2
S19 sample			97		291		234	

London Overground

TOC / purpose	London Overground		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	50	4	43	6	57	3	61	3
S19 sample			967		94		678	

South Western Railway

TOC / purpose	South Western Railway		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	31	14	21	20	37	8	43	8
S19 sample			929		193		958	

Southeastern

TOC / purpose	Southeastern		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	32	10	23	16	34	4	43	6
S19 sample			733		116		719	

Southern

TOC / purpose	Southern		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	28	14	19	18	29	11	41	8
S19 sample			654		120		729	

TfL Rail

TOC / purpose	TfL Rail		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
A18	50	5	44	6	62	1	58	4
S19	53	5	44	6	65	0	69	3
S19 sample			554		51		394	

Note: Only two waves of data for TfL Rail is available, as the former Heathrow Connect stopping service, London Paddington – Heathrow, was incorporated into the operation from Autumn 2018 survey. As TOC boundary is significantly changed it cannot be compared with prior waves.

Thameslink

TOC / purpose	Thameslink		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	36	12	27	16	39	11	48	7
S19 sample			649		123		431	

West Midlands Trains

TOC / purpose	West Midlands Trains		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	48	4	37	6	54	1	56	2
S19 sample			454		103		516	

Long distance operators

Cross Country

TOC / purpose	CrossCountry		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	53	4	35	10	47	3	61	2
S19 sample			389		272		617	

East Midlands

TOC / purpose	East Midlands Trains		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	51	5	37	7	46	3	60	4
S19 sample			384		201		519	

Grand Central

TOC / purpose	Grand Central		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	64	3	66	2	61	4	65	3
S19 sample			19		117		408	

Hull Trains

TOC / purpose	Hull Trains		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	58	5	49	9	59	4	60	5
S19 sample			99		154		287	

TransPennine Express

TOC / purpose	TransPennine Express		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	43	7	26	15	37	5	51	4
S19 sample			344		175		465	

Virgin Trains

TOC / purpose	Virgin Trains		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	63	2	52	2	56	4	67	1
S19 sample			249		375		550	

Regional operators

Merseyrail

TOC / purpose	Merseyrail		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	64	3	48	7	65	0	75	1
S19 sample			367		30		351	

Northern

TOC / purpose	Northern		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	35	16	22	27	33	9	44	9
S19 sample			603		119		683	

ScotRail

TOC / purpose	ScotRail		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	41	13	49	6	48	8	29	22
S19 sample			687		167		583	

Transport for Wales

TOC / purpose	TfW Rail		Commuter		Business		Leisure	
	Trust	Do Not	Trust	Do Not	Trust	Do Not	Trust	Do Not
NRPS wave								
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
S19	39	9	23	17	46	6	46	6
S19 sample			380		135		521	