



Rail Delivery Group – building passenger trust

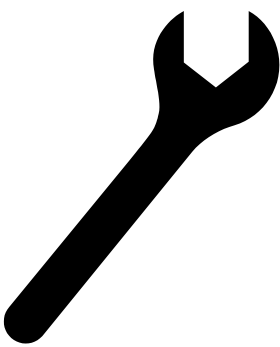
David Sidebottom

Passenger Director

Key findings from the Rail Passenger Trust Survey (RPTS)

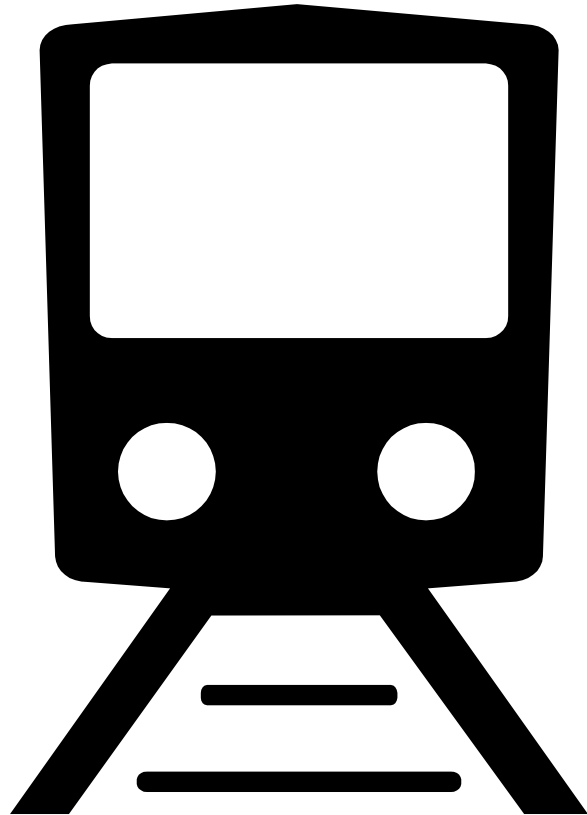
RPTS - aimed to understand customer relationships with TOCs, specifically looking at how to generate trust

National Rail Passenger Survey (NRPS)



The NRPS provides a network-wide picture of customers' satisfaction with rail travel

The focus is on key transactional measures that provide important information on functional performance

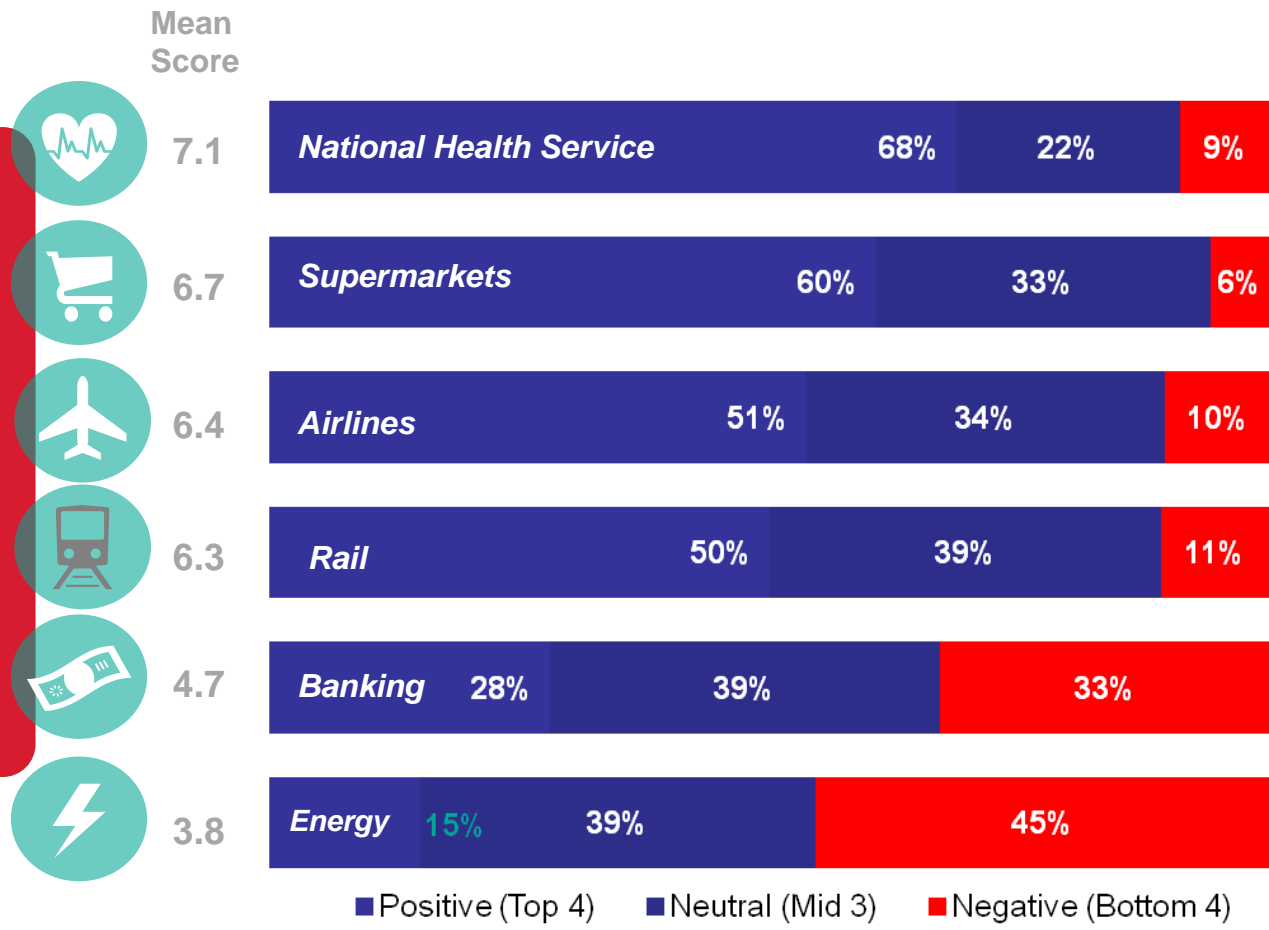


Rail Passenger Trust Survey (RPTS)



RPTS looks more closely at the relationship between Train Operating Companies and consumers
Focus on relationship measures that provide important information on how to improve brand and industry perceptions

Passengers are fairly positive about rail – it is rated closer to supermarkets and airlines than banks and energy



“Contrary to most stories in the news, services are generally excellent, in my view, and often good value.”

“Over recent years I have generally had positive experiences of travelling by train.”

“I trust rail companies in terms of their function and efficiency, but the fare increases put me off giving a better score.”

“It’s very expensive to travel by rail and the trains are not modern and often dirty and running late.”

Q4. 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: All respondents – 4000
 Q5. Why did you give a score of <score from Q4> for Rail industry?

Despite high positivity and high last journey satisfaction, few would recommend rail as a way of travel, indicating there is no direct link between the two

Net Promoter Score

Total



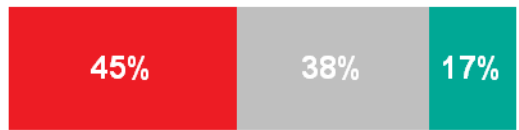
■ Detractor ■ Passive ■ Promoter

Type of traveller

Commuter



Business



Leisure



■ Detractor ■ Passive ■ Promoter

Age group

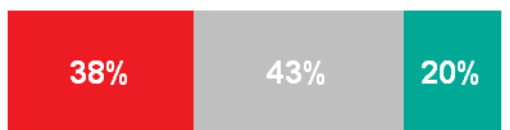
16-34



35-54



55+



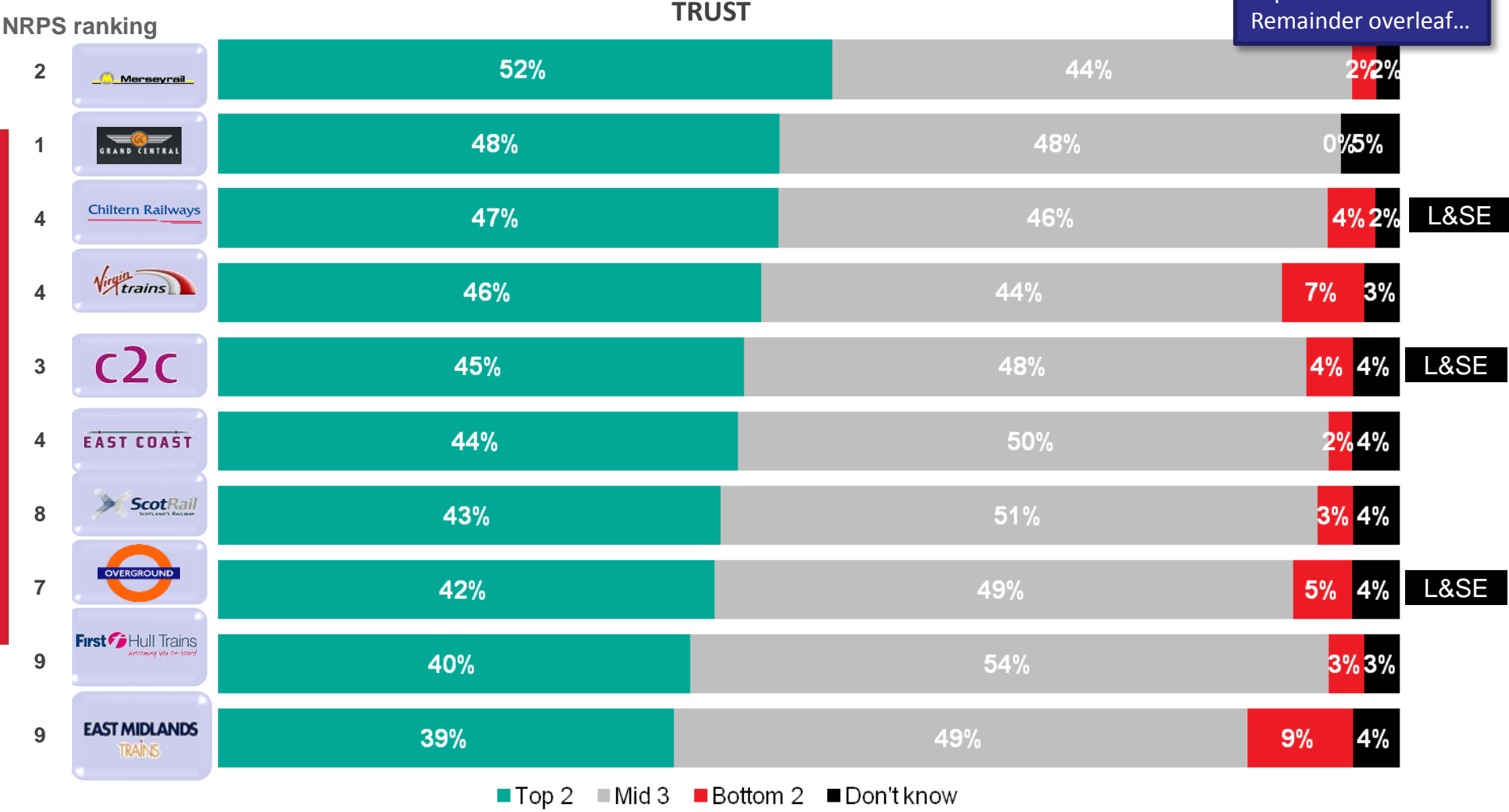
■ Detractor ■ Passive ■ Promoter

Q6. On a scale from 0-10, how likely would you be to recommend to a friend that they use rail as a way to travel if they were considering how to make a journey? Again, please use a scale where 0 is extremely unlikely and 10 is extremely likely? Base: All respondents – 4000

Promoters: 9-10 out of 10
 Passives: 7-8 out of 10
 Detractors: 0-6 out of 10
 Net Promoter Score: Promoters minus Detractors

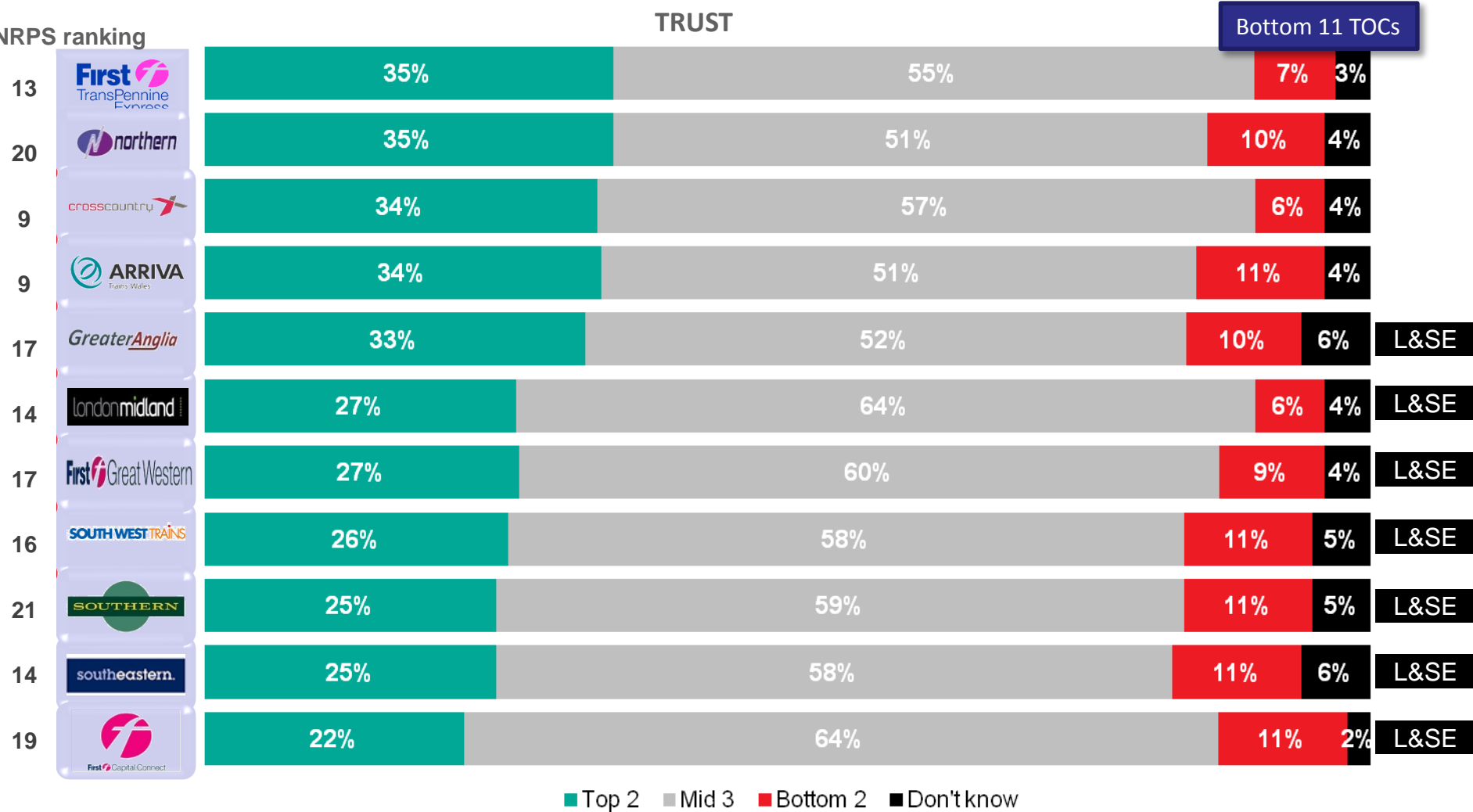
The best performing TOCs all have relatively high levels of Trust, reinforcing general positivity towards the rail industry

Top 10 TOCs
Remainder overleaf...



Q19. All things considered and on balance, how much do you trust the TOC on a scale of 1-7, where 1 means 'do not trust them at all' and 7 means 'trust them a great deal'?
Base: All aware of a named TOC – 3751

Many London & South East operators perform poorly in terms of Trust



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Understanding brand perceptions



The Trust Model used by Chime Insight & Engagement identifies how to improve brand perceptions by looking at the different ways customers think about organisations

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



Service

“downwards trust”

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



Relationship

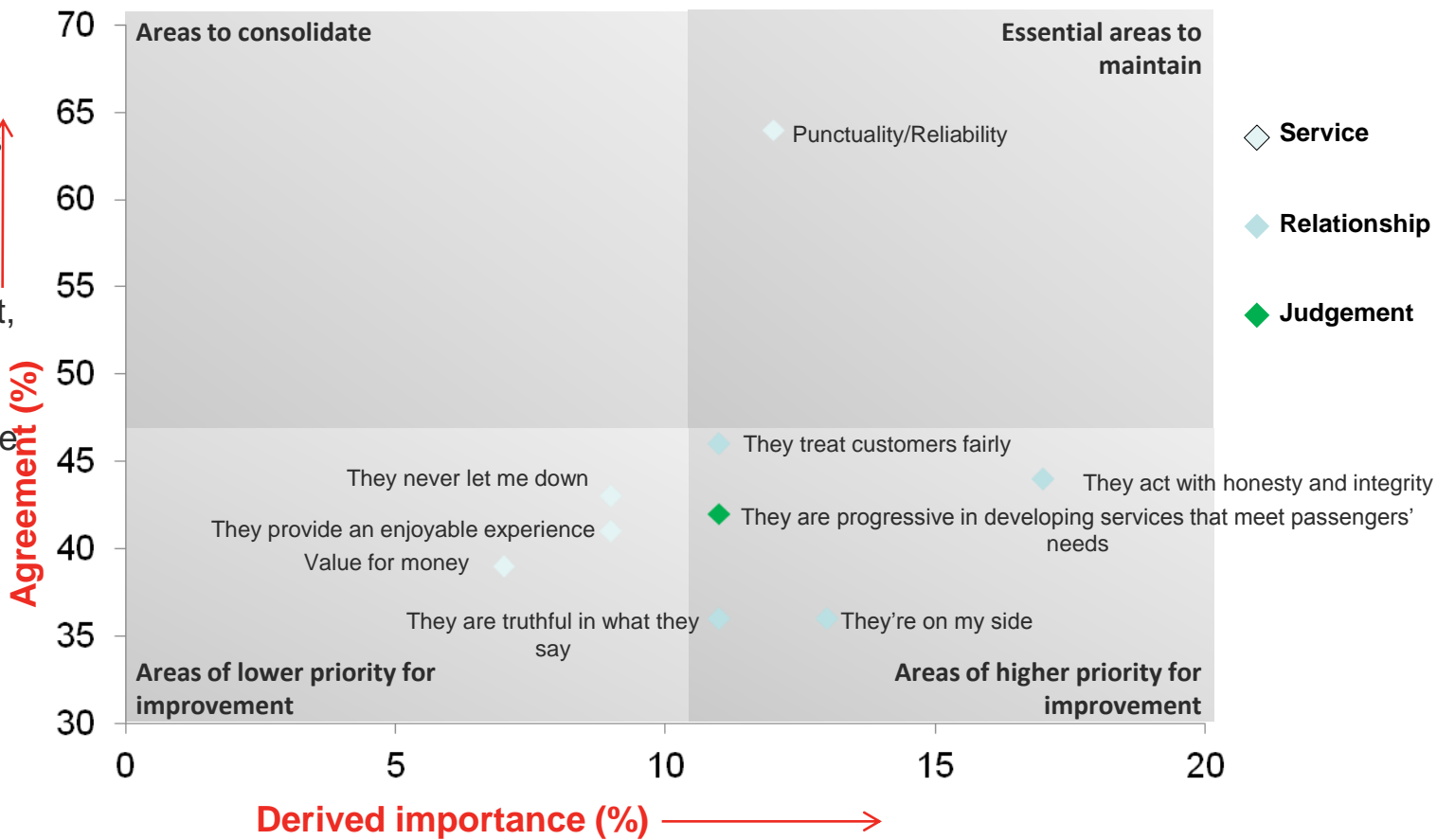
“sideways trust”

- Truthful in what they say
- Act with honesty and integrity
- Build long-term relationships
- Treat customers fairly
- Communicate well with customers



Relationship is more important than Service or Judgement in driving trust in train operating companies, emphasising the importance of passenger engagement

Top nine drivers of trust in train company



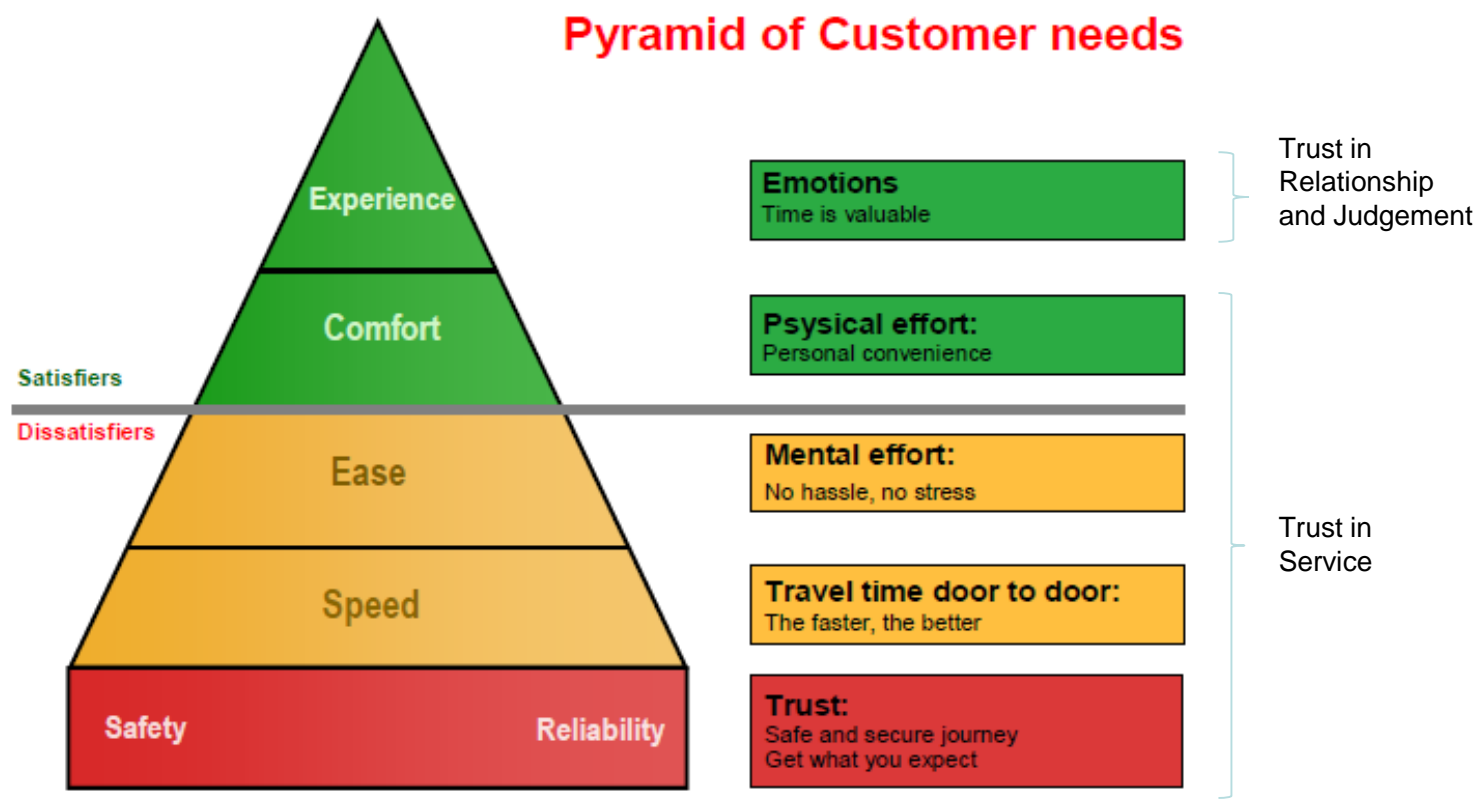
This shows how passengers rate each attribute. The higher up the chart, the better the performance on that particular attribute

This shows how important each attribute is in driving trust. The further to the right on the chart, the more important that particular attribute is

Trust in Service



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



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

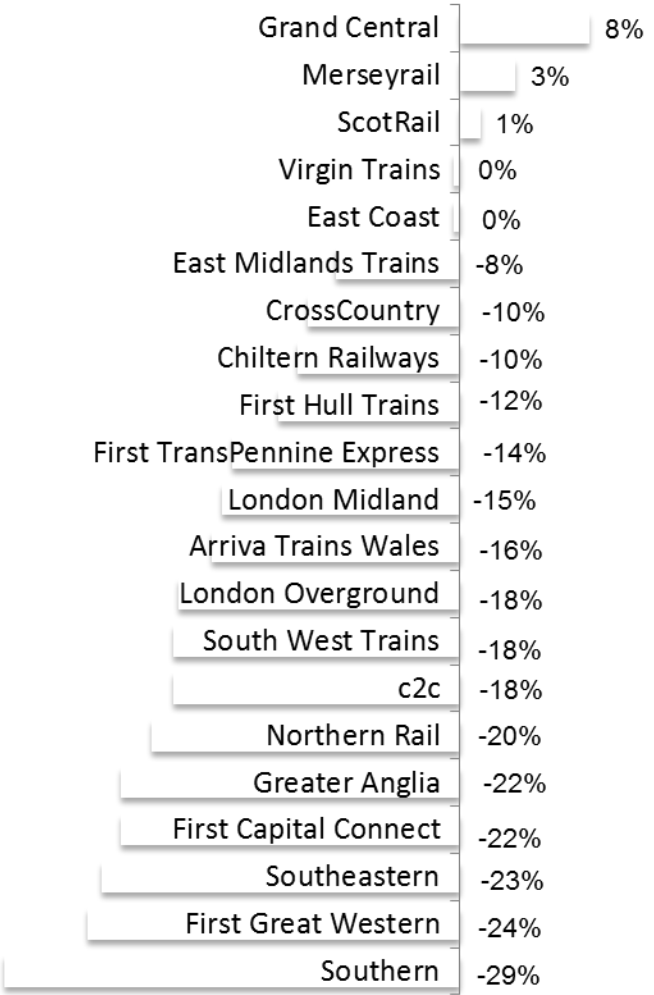
London & South East operators perform particularly poorly on Service, indicating that it may be a more difficult environment for delivery

Service

“downwards trust”

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

Net agree: -14%



% net agree:
 Trust in Service minus lack of Trust in Service

 Trust in Service = agree on 4 or more measures
 Lack of trust in Service = disagree on 4 or more measures

Trust in Relationship

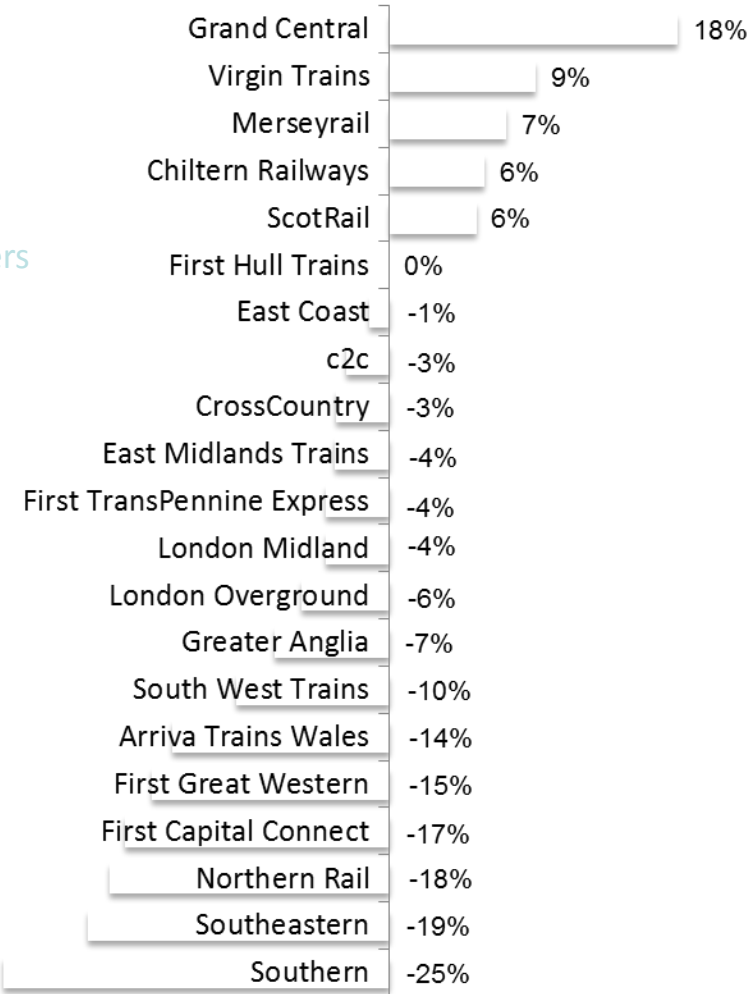


This is particularly a problem for London & South East operators, where fewer interactions with staff may make this more difficult, and where customers don't feel TOCs are open about problems or that they are treated with respect

Relationship
"sideways trust"

- Truthful in what they say
- Act with honesty and integrity
- Build long-term relationships
- Treat customers fairly
- Communicate well with customers

Net agree: -6%



% net agree:
 Trust in Relationship minus
 lack of Trust in Relationship

Trust in Relationship =
 agree on 4 or more
 measures

Lack of trust in Relationship
 = disagree on 4 or more
 measures

While TOC communication has a positive impact, negative perceptions are driven by the media rather than through passenger word of mouth

Sources of information about railways

New media and Word Of Mouth (WOM)

Traditional media

Train Operating Company media

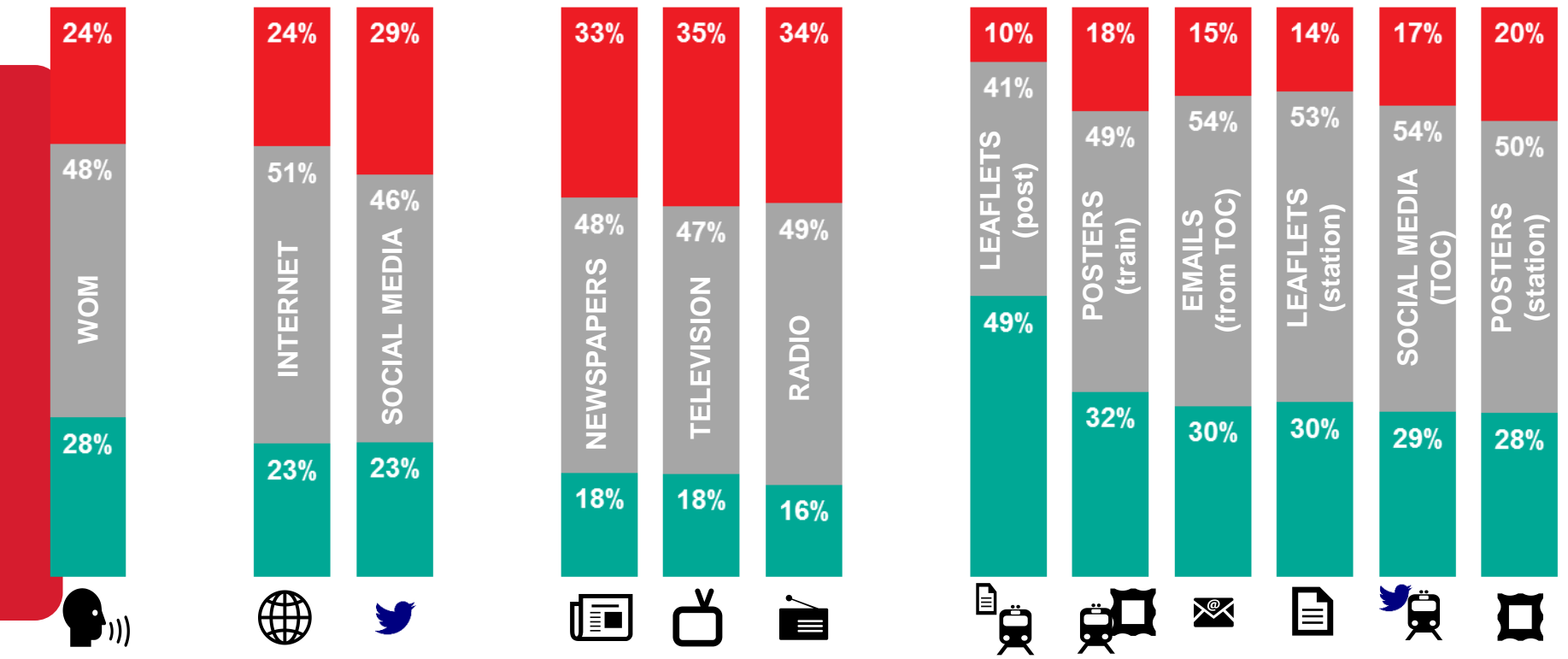
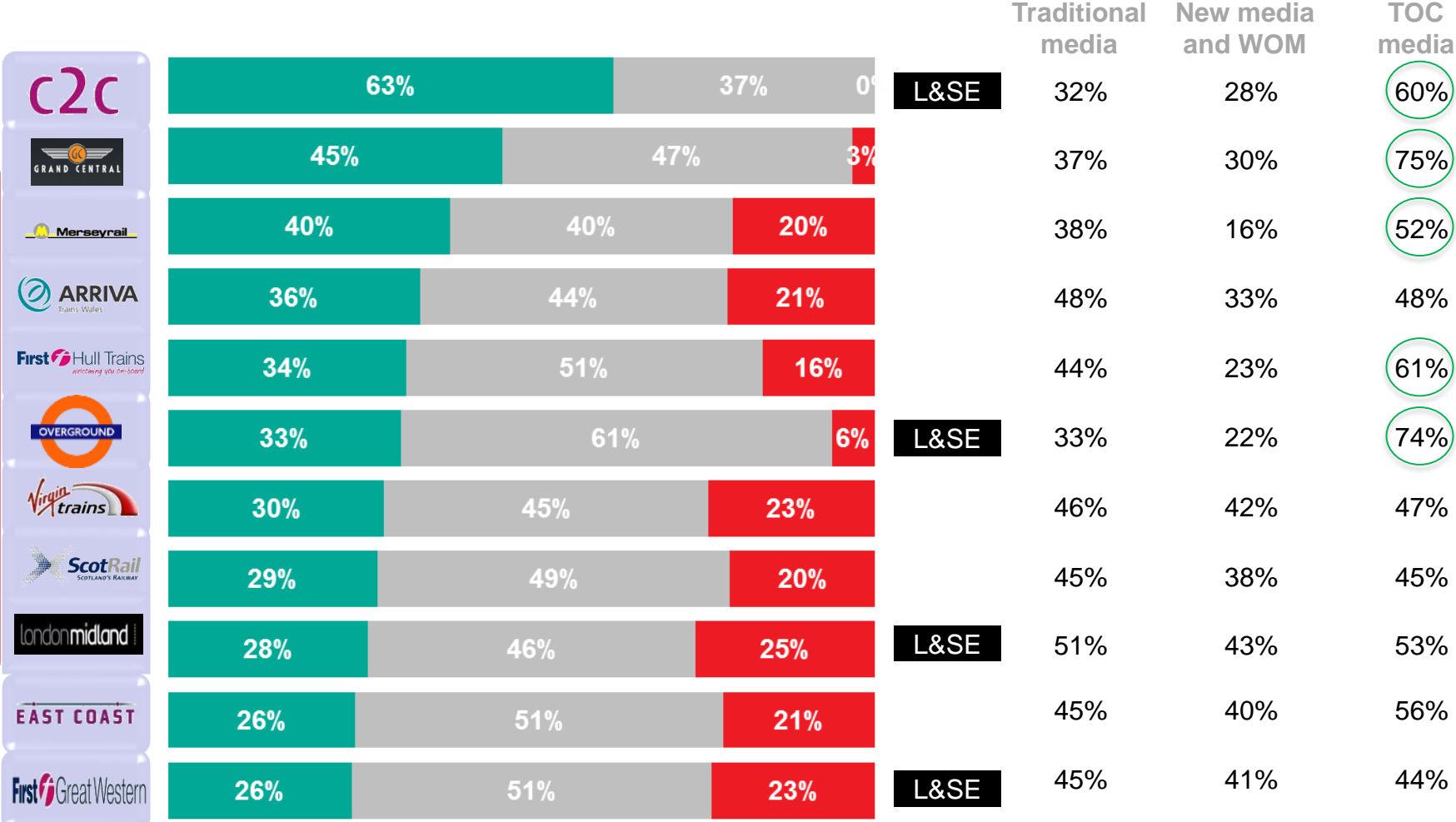


Chart shows description of overall positivity split by those who have seen or heard each source of information. Respondents may have seen more than one source

■ Generally positive
 ■ Mixed
 ■ Generally negative

Q32. Where have you seen or heard anything about the railways (train services and companies) recently? Q33: On balance, would you describe everything you have heard or read about the railways recently as generally positive or generally negative? Base: All respondents – 4000; All apart from saying none of the above or don't know in Q32 – 2747

The best performing TOCs have a much higher incidence of TOC communications than coverage in traditional media



Top 10 TOCs
Remainder overleaf...

Generally positive Mixed Generally negative

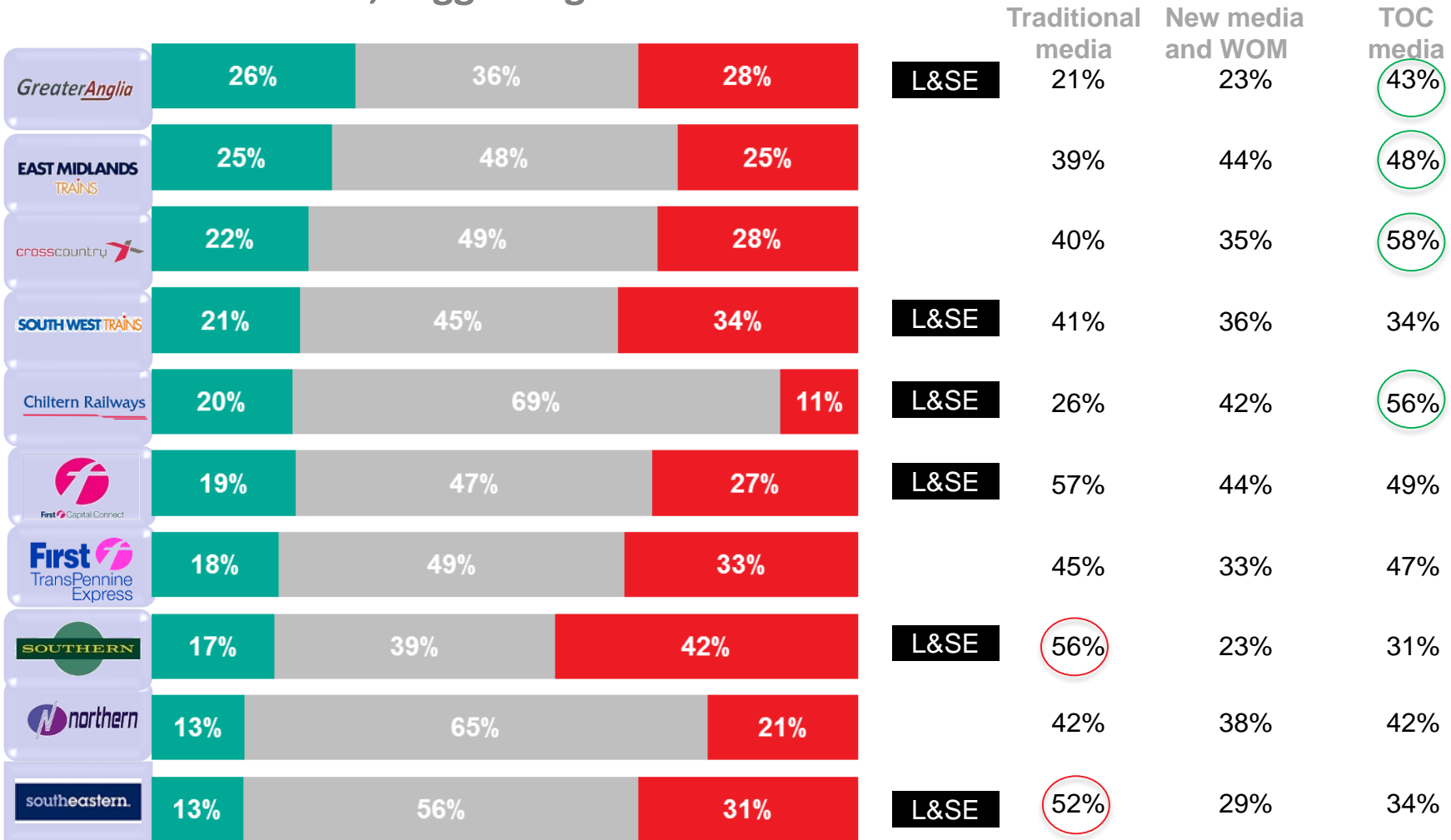
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○ TOC media 10 percentage points lower than other channels

○ TOC media 10 percentage points higher than other channels



London & South East operators have higher traditional media coverage generally and lower scores overall, suggesting the two are linked



Bottom 11 TOCs

■ Generally positive
■ Mixed
■ Generally negative

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Trust in Judgement



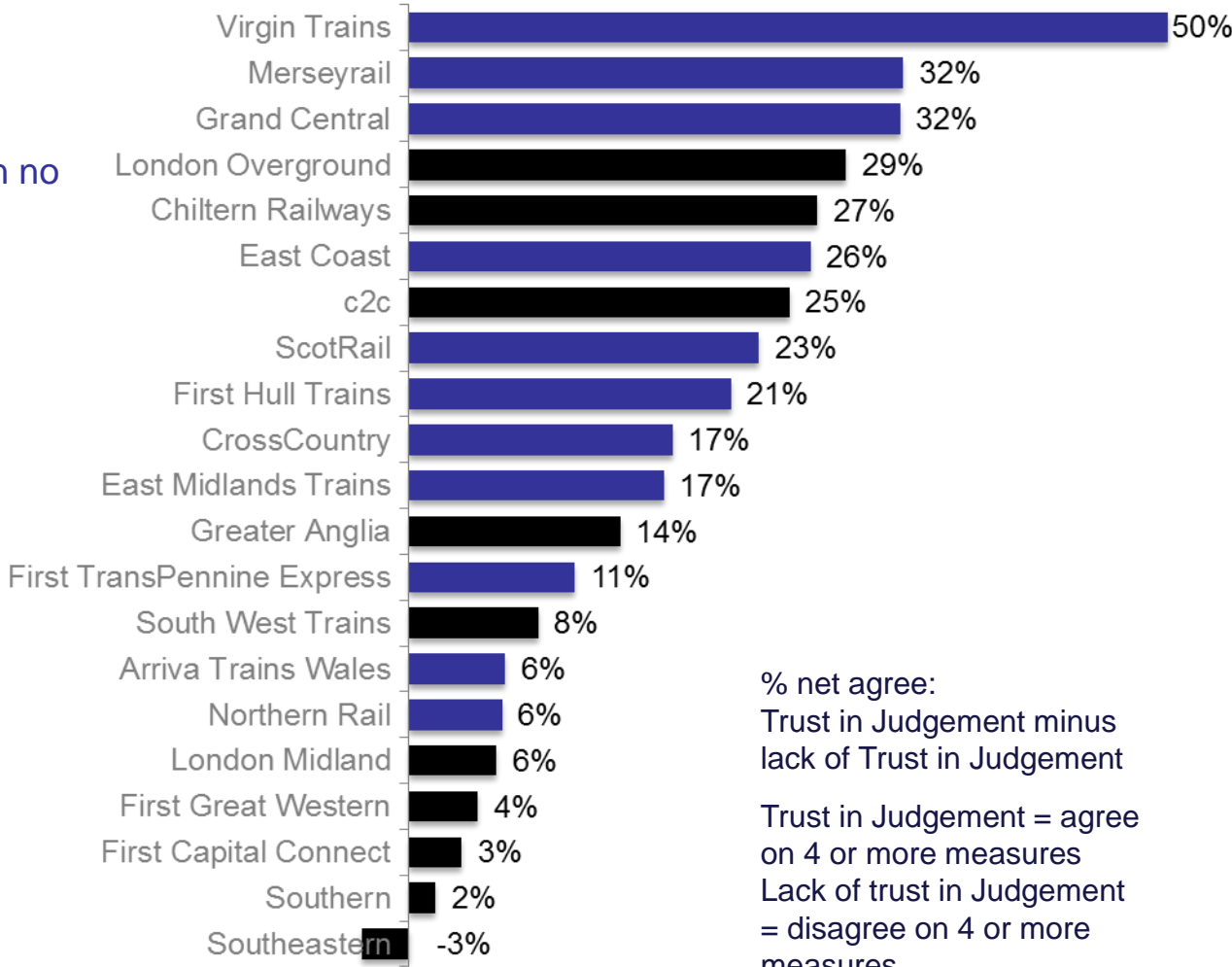
Virgin out-performs the market on Judgement, but it does not translate into leadership on overall trust or satisfaction due to Judgement's limited impact

Judgement "upwards trust"

- High principles
- Do the right thing even when no one is looking
- Good reputation in industry
- Progressive in developing services
- Show leadership in the rail industry

Net agree: 16%

London & South East operators



% net agree:
Trust in Judgement minus
lack of Trust in Judgement

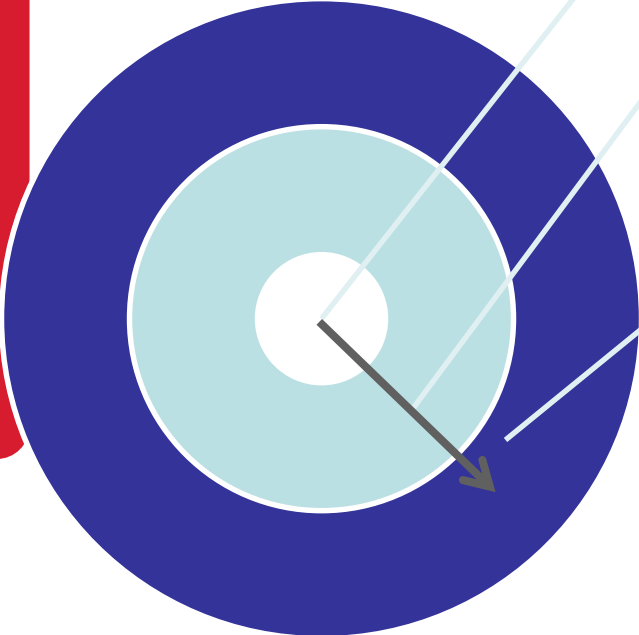
Trust in Judgement = agree
on 4 or more measures
Lack of trust in Judgement
= disagree on 4 or more
measures

In summary



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

Developing trust, from Service to Judgement



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

Trust – key relationship issues?

- Truthful in what they say
 - ppm vs. 'on time' at my station
 - clear/consistent explanations when things go wrong
- Act with honesty and integrity – easily purchased fares
- Treat customers fairly – equitable penalties/reasonable recompense
- Communicate well with customers
 - transparent, disaggregated and personalised information
 - empower frontline staff
 - effective resolution of complaints
- Build long-term relationships
 - new channels of communication
 - loyalty rewards ...

Implications for planning process

- The 'core product' underpins aspirations, satisfaction and trust:
 - Capacity
 - Frequency
 - Punctuality / cancellations
 - Managing disruption
- This in turn will help to drive up satisfaction with value for money

Thank you



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