



# ***Network Rail 2014 Customer Survey Report***

## **Route Report: Anglia**

Prepared by:



January 2015

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# ***Methodology and Sample***

# Methodology and sample

## Methodology



- The questionnaire was revised to provide a more relevant question set which could be benchmarked going forward into CP5, with a continued focus on open-ended actionable results
- Mixed methodology of telephone and online interviews
- The survey was conducted between September 29<sup>th</sup> and 13<sup>th</sup> November, 2014.

## Sample



- GfK interviewed senior Network Rail customers from TOCs and FOCs from sample provided by Network Rail
- 357 contacts were provided and a warm up letter was sent by Network Rail to all contacts on the sample prior to the interviews beginning.

## Response rates



- 257 interviews were achieved
  - 3 telephone interviews
  - 254 online interviews
- Overall response rate of 70% (77% in 2013 & 78% in 2012)
- 91 customers chose to answer about Anglia.

# *Route Summary*

# Summary

## Key Findings

- Anglia was the strongest performer last year but this year has declined across a number of attributes, with significant decreases in both overall and route satisfaction.
- All customer service attributes were well above average in 2013, whilst this year has seen notable declines in some attributes, such as capability to learn and taking ownership.
- Anglia performs below average across the majority of activity areas.

## Action Areas

1. Taking ownership, delivering on promises, being more customer driven and improving train performance are key action areas impacting on satisfaction.
2. Safety is in decline and an area of concern
3. Look to address issues in all activity areas, in particular infrastructure maintenance and renewals, managed, franchised stations and depots.

## 32% Overall Satisfaction

Overall satisfaction has seen a significant decrease this year (-51% points)

## 24% Route Satisfaction

Route satisfaction is relatively low for Anglia compared to all other routes, and compared to the national average of 36%

## 30% Train Service Performance

Train service performance has steeply declined since last year (-42% points) and is now slightly below the overall national average of 35%.

## 8% Advocacy

Advocacy has dropped by 35% compared to last year and is now below the overall national average (15%)

Green is an increase of 5% or more, Red is a decrease of 5% or more on 2013

# ***Route compared with overall findings***

# Key scores

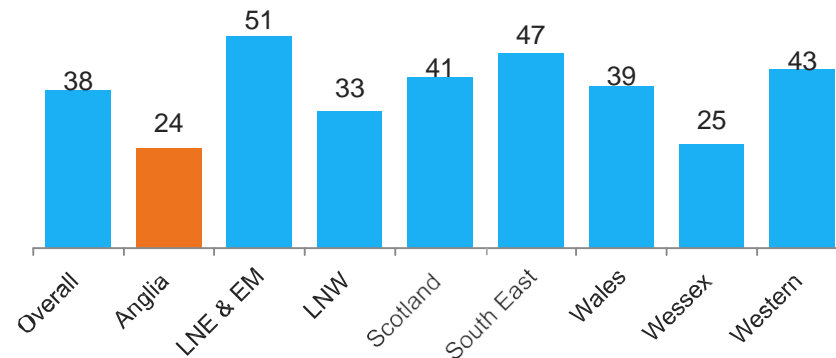
Anglia scores have decreased significantly since last year and are well below average for both overall and route satisfaction

**Overall satisfaction**  
% satisfied

% change  
since  
2013



**Route satisfaction**  
% satisfied



Overall satisfaction = satisfaction with Network Rail as a whole amongst those operating on each of the routes

Route satisfaction = satisfaction with each specific route amongst those operating on each of the routes

Green is an increase of 5% or more, Red is a decrease of 5% or more on 2013

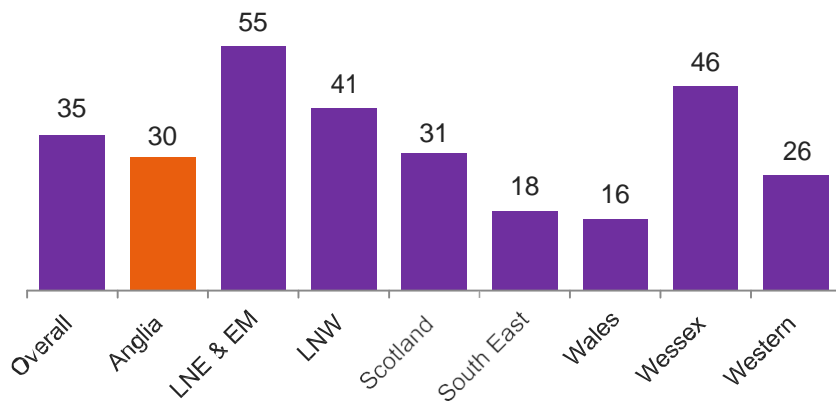


# Key scores

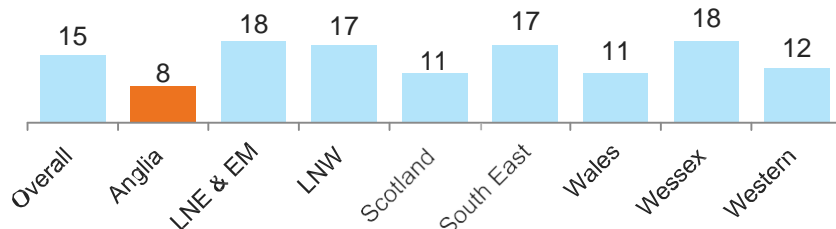
Customers operating on the Anglia route are much less likely to speak highly of Network Rail this year compared to 2013

**Satisfaction with train service performance**  
% satisfied

% change  
since  
2013



**Advocacy**  
% would speak highly



Green is an increase of 5% or more, Red is a decrease of 5% or more on 2013

## Customer service attributes satisfaction

Anglia performs above average on communication, collaborative working, being prepared to challenge, openness and engagement, however, taking ownership and applying lessons learnt are notably lower than the national average

Overall versus Route: % satisfied

	Overall	Anglia	Gap*
Works collaboratively	56	68	+12
Prepared to challenge	53	62	+9
Openness and engagement	50	56	+6
Effective communication	46	56	+10
Focus on long term strategic needs	46	43	-3
Takes ownership	42	31	-11
Learns and applies lessons learnt	26	15	-11
Customer driven	23	21	-2
Delivers what it says	22	18	-4

Q4c. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail in the following areas?

\* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

## Activity area satisfaction

Anglia performs below average across most activity areas, with particularly low scores for franchised stations & depots and managed stations

Overall versus Route: % satisfied

	Overall	Anglia	Gap*
Route operations	40	40	0
Strategic Route planning	32	31	-1
Managed stations	29	11	-18
Franchised stations and depots	28	6	-22
Delivery of enhancements projects	28	19	-9
Timetable planning	26	37	+11
Infrastructure maintenance and renewals	25	12	-13
Access planning	18	20	+2

Q21. How satisfied or dissatisfied are you with Network Rail performance with respect to...?

\* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

# ***Route key scores***

# Overall satisfaction

Satisfaction from customers on the Anglia route has dropped substantially from the peak scores seen in 2012 and 2013



Q1. Taking into account all of your experiences with Network Rail during the last 12 months as a whole, how satisfied or dissatisfied are you with Network Rail?

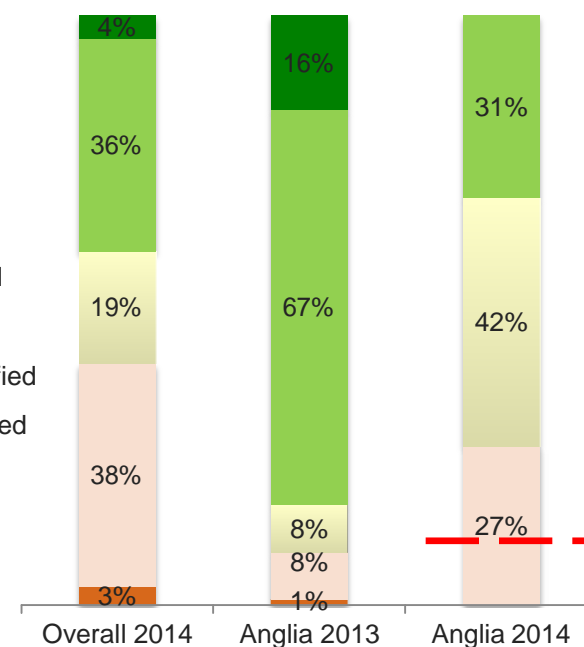
## Anglia overall satisfaction:

response breakdown

compared with previous year

Mean = 3.00    Mean = 3.88    Mean = 3.05

- Very satisfied
- Fairly satisfied
- Neither
- Fairly dissatisfied
- Very dissatisfied



**NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL**

## *Reasons for overall satisfaction/dissatisfaction*

A large green circle containing the text "31 %".

31 %

of Anglia customers claim to be satisfied.

The key reasons are **strong relationships with NR representatives**

A large red circle containing the text "27 %".

27 %

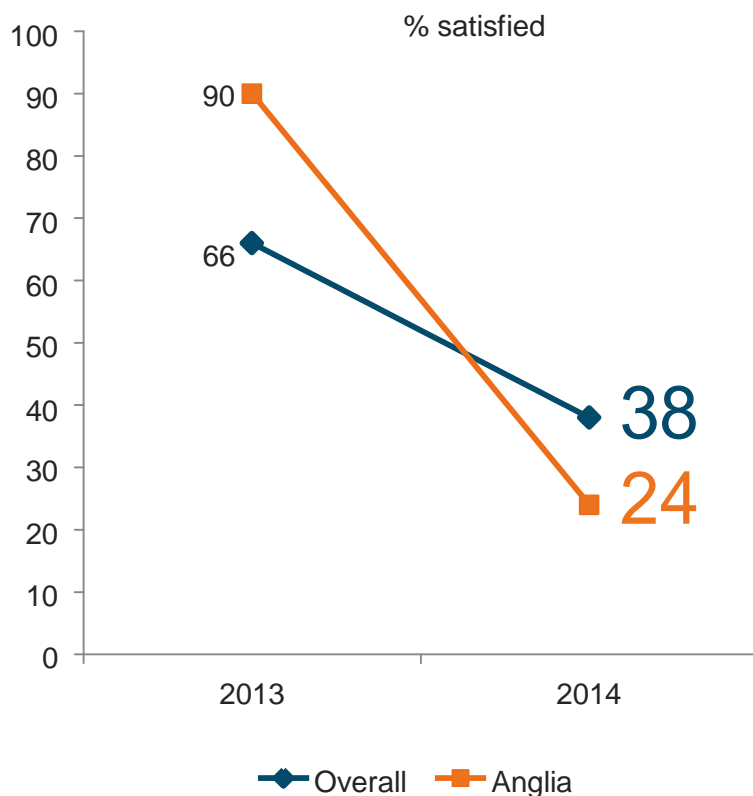
of Anglia customers claim to be dissatisfied.

The key reasons are **responsiveness, lack of continuity and operational performance**

# Route satisfaction

Satisfaction on the Anglia route has fallen significantly this year (-66% points) and has dropped below the overall average

Route satisfaction: year on year



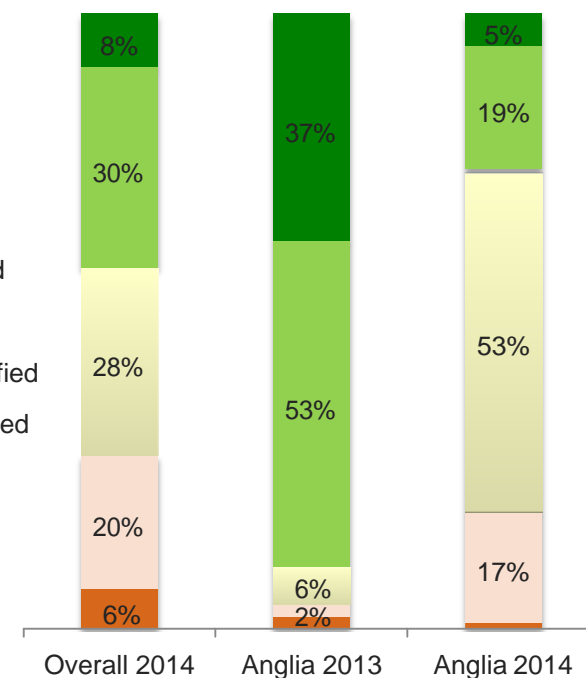
Anglia route satisfaction:

response breakdown

compared with previous year

Mean = 3.17    Mean = 4.22    Mean = 3.10

- Very satisfied
- Fairly satisfied
- Neither
- Fairly dissatisfied
- Very dissatisfied



Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

## *Reasons for route satisfaction/dissatisfaction*



24 %

of Anglia customers claim to be satisfied.

The key reasons are **good customer service and confidence in the route team**



18 %

of Anglia customers claim to be dissatisfied.

The key reasons are **lack of communication, poor incident management, poor planning of Ipswich Yard**

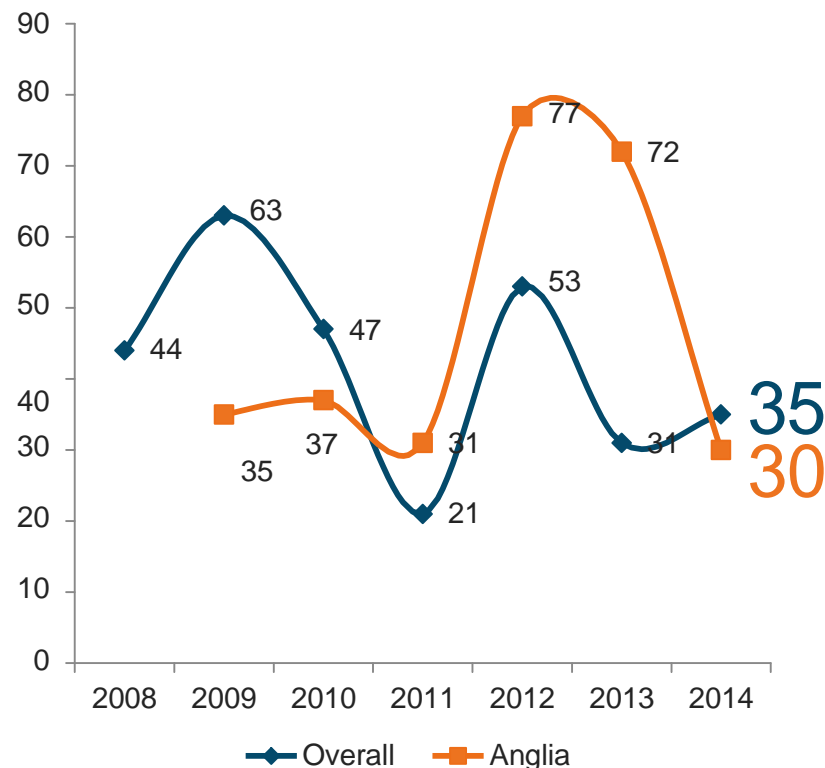


# Overall train service performance

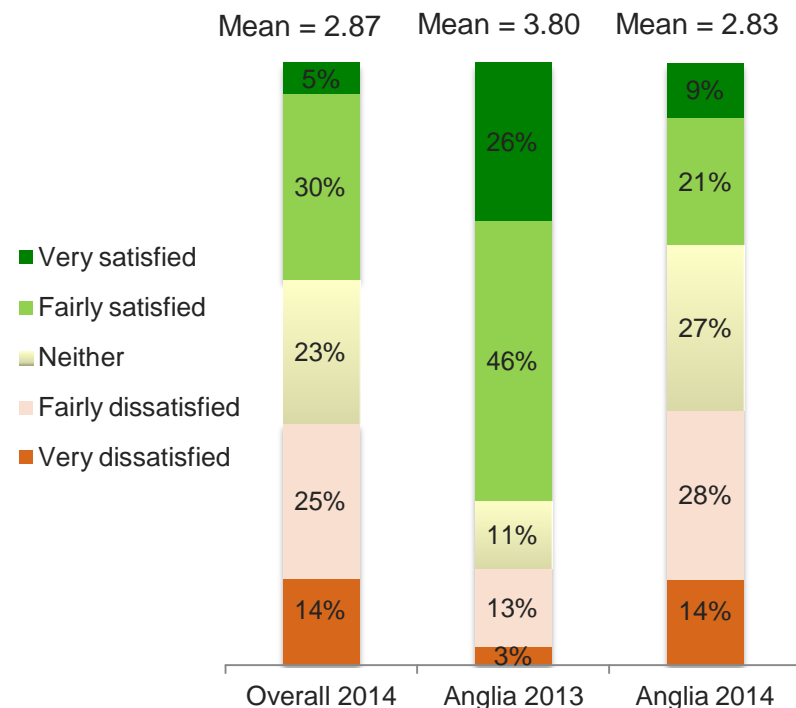
Satisfaction with train service performance has decreased significantly and below the overall average

## Satisfaction with train service performance:

year on year  
% satisfied



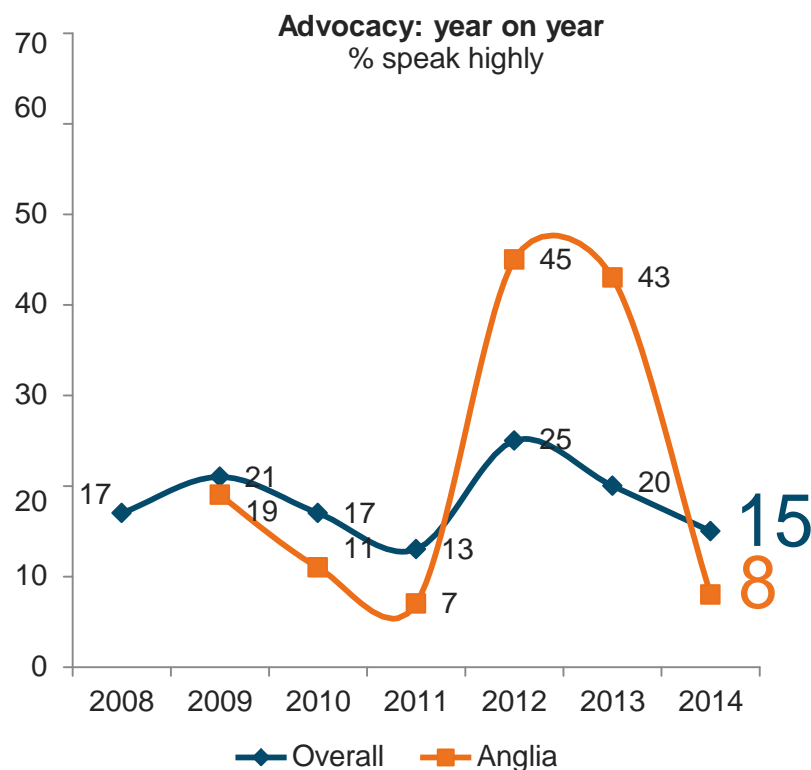
## Anglia train service performance - response breakdown compared with previous year



Q4c. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail's part in overall train service performance

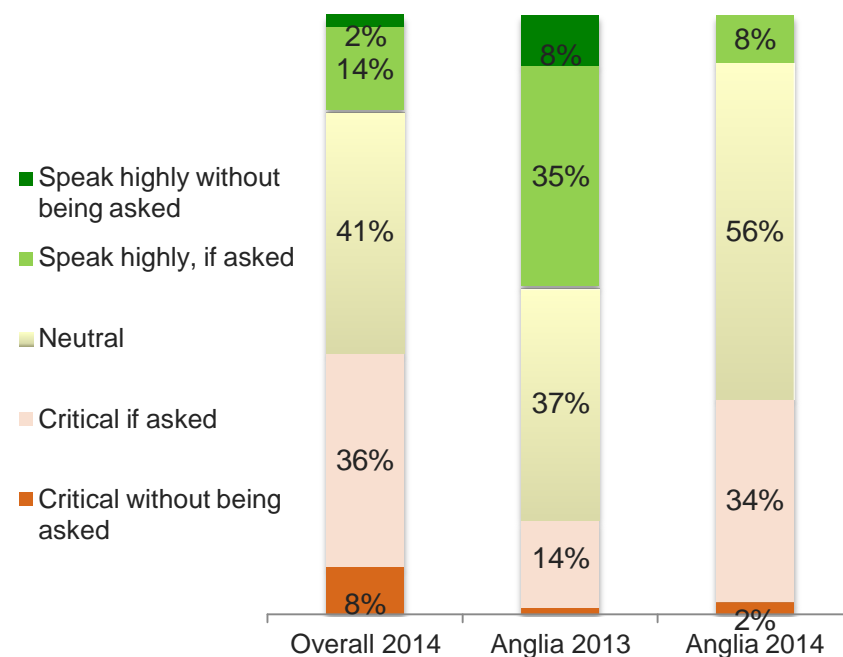
# Advocacy: Whether customers would speak highly or critically of Network Rail

Customers on the Anglia route are much more likely to feel neutral about Network Rail and are more likely to be critical than they were last year



## Anglia advocacy - response breakdown compared with previous year

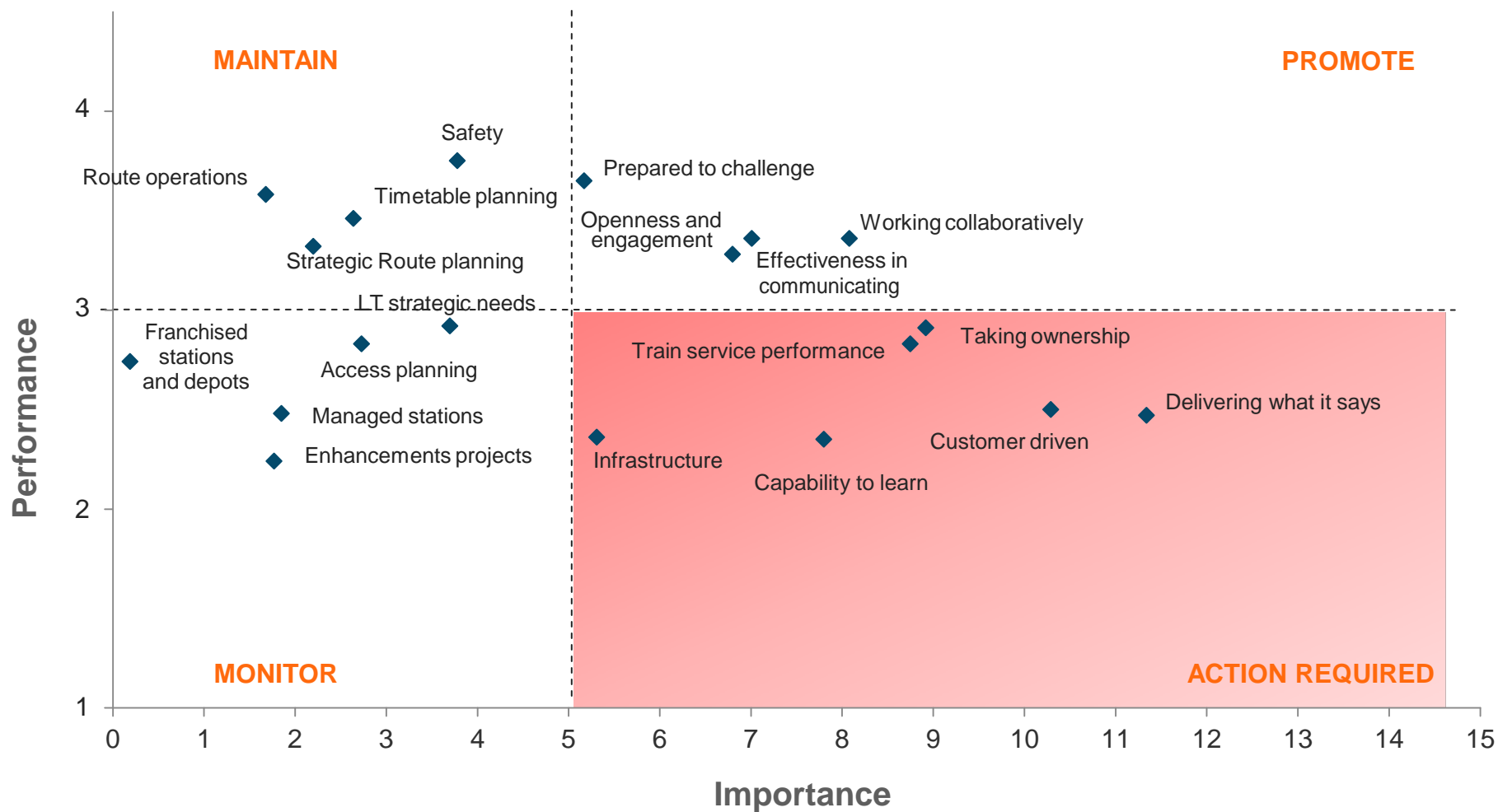
Mean = -0.35    Mean = 0.38    Mean = -0.29



Q3. Which of these best describes how you feel about Network Rail as an organisation overall, taking all you know about them into consideration?

# ***Additional findings***

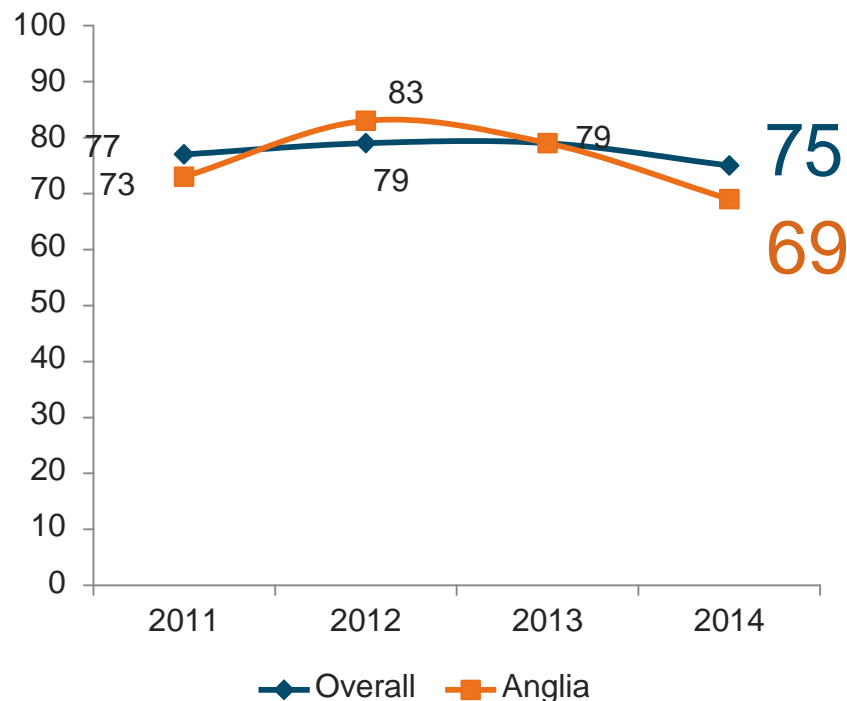
# Drivers of satisfaction against route performance: Anglia



# Satisfaction with safety

Satisfaction with safety has dipped below the overall average with far fewer customers who are 'very satisfied'

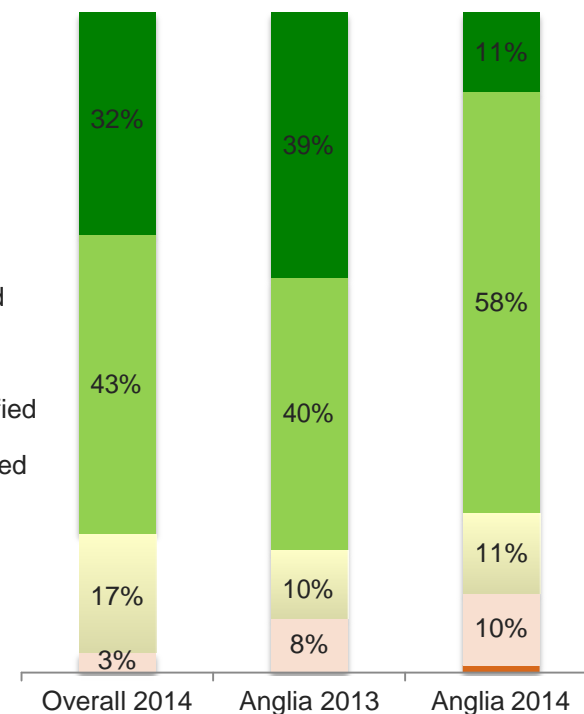
**Satisfaction with safety:  
year on year  
% satisfied**



**Anglia satisfaction with safety - response  
breakdown compared with previous year**

Mean = 4.08    Mean = 4.14    Mean = 3.75

- Very satisfied
- Fairly satisfied
- Neither
- Fairly dissatisfied
- Very dissatisfied



Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

## *Reasons for satisfaction/dissatisfaction with safety*

A large green circle containing the text "69 %".

69 %

of Anglia customers claim to be satisfied with safety.

The key reasons are **a consistent focus on safety and visibility that safety is a priority for Network Rail**

A large red circle containing the text "11 %".

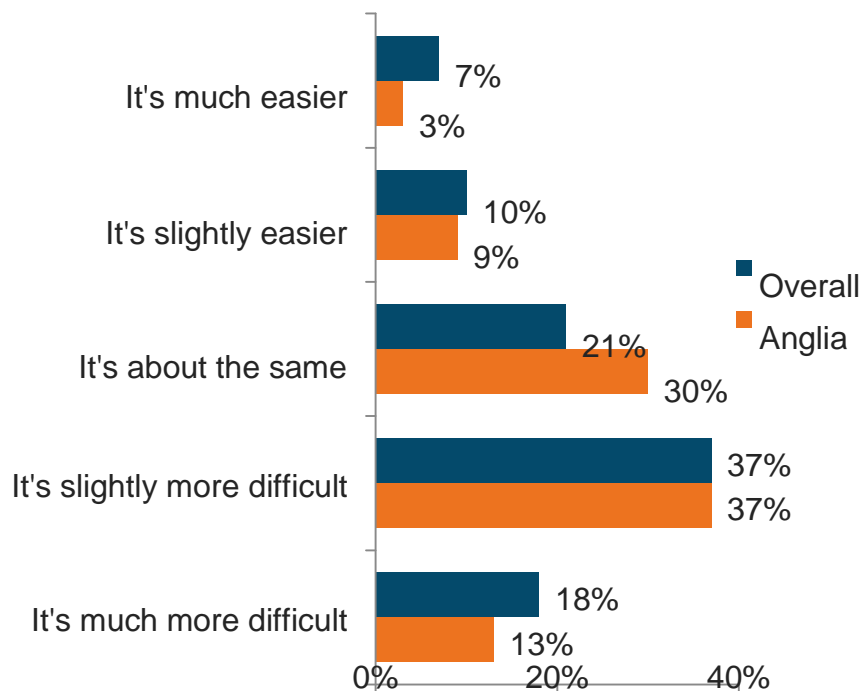
11 %

of Anglia customers claim to be dissatisfied with safety.

The key reasons are **lack of supervision and minimal control of contractors, insufficiently surveying infrastructure**

## Working with Network Rail compared to other organisations

Only 12% view working with Network Rail as easy compared with other organisations with half of customers feeling it is more difficult.



















































Q7. Compared with other organisations you work with, how do you find working with Network Rail?

Q8. Why do you say that?





















































# *Appendix*



# Key scores

Mean Scores	Overall satisfaction			Route satisfaction			Train Performance			Advocacy		
<b>Total mean score</b>	<b>3.00</b>		<b>-0.41</b>	<b>3.17</b>		<b>-0.30</b>	<b>2.87</b>		<b>0.03</b>	<b>-0.35</b>		<b>-0.23</b>
TOC/FOC												
TOC	2.98		-0.46	3.10		-0.37	2.81		0.00	-0.36		-0.27
FOC	3.19		0.09	3.48		-0.10	3.50		0.31	-0.19		0.23
<b>Route</b>												
<b>Route average</b>	<b>3.05</b>		<b>-0.42</b>	<b>3.17</b>		<b>-0.48</b>	<b>2.87</b>		<b>0.12</b>	<b>-0.33</b>		<b>-0.22</b>
Anglia	3.05		-0.83	3.10		-1.12	2.83		-0.97	-0.29		-0.67
Wales	2.98		-0.74	3.11		-0.75	2.53		-0.42	-0.41		-0.25
Wessex	3.16		-0.48	3.18		-0.19	3.24		0.61	-0.23		-0.06
Western	3.28		-0.32	3.25		-0.07	2.73		0.23	-0.26		-0.07
LNW	2.85		-0.66	2.88		-0.96	2.96		0.10	-0.52		-0.54
LNE & EM	3.15		-0.21	3.36		-0.09	3.43		0.73	-0.28		-0.18
South East	3.14		-0.33	3.28		-0.44	2.30		-0.11	-0.19		0.02
Scotland	2.80		0.03	3.23		-0.01	2.91		0.21	-0.43		-0.08

# Key scores – customers on route

TOC/FOC	Mean Scores	% Miles by Route 2014	Overall satisfaction		Route satisfaction		Train Performance		Advocacy	
			2014	2013/2014 +/-	2014	2013/2014 +/-	2014	2013/2014 +/-	2014	2013/2014 +/-
	<b>Overall Route Score</b>	<b>Total</b>	<b>3.16</b>	 -0.48	<b>3.10</b>	 -1.12	<b>2.83</b>	 -0.97	<b>-0.29</b>	 -0.67
TOC	Abellio Greater Anglia Ltd	65%	2.91	 -1.18	2.91	 -1.54	2.55	 -1.54	-0.36	 -0.86
	c2c Rail	13%	3.57	 -0.43	3.57	 -0.68	3.43	 -0.71	0.00	 -0.50
	CrossCountry	3%	2.00	 -1.57	4.00	 1.14	2.00	 -0.43	-1.00	 -1.29
	East Midlands Trains	2%	2.00	 -1.00	4.50	 2.25	3.50	 1.00	-0.50	 -0.75
	GTR	3%	3.00	 1.20	4.00	 -0.20	3.50	 2.10	0.25	 1.25
	Grand Central	<1%	4.00	NA	5.00	NA	4.00	NA	-1.00	NA
	First Hull Trains	<1%	4.00	NA	3.00	NA	4.00	NA	-2.00	NA
	London OG	8%	3.14	 -0.29	3.71	 -0.72	2.83	 -0.46	-0.14	 -0.14
	London UG	<1%	3.00	 0.00	2.75	 -0.45	2.67	 -0.33	-0.50	 -0.90
FOC	Colas	<1%	4.00	 0.00	4.00	 1.00	3.50	 -0.50	0.50	 -0.50
	DB Schenker	1%	3.25	 -0.75	3.63	 0.30	3.75	 1.42	-0.19	 0.48
	DirectRail Services	<1%	3.00	 -1.00	3.13	NA	3.10	 -0.90	-0.40	 -0.40
	Freightliner Ltd	4%	2.50	 0.50	2.33	 0.33	2.75	 -0.25	-1.13	 -0.13
	Freightliner Heavy Haul	<1%	2.80	 2.80	4.00	NA	3.75	NA	0.20	NA
	GB Railfreight	<1%	4.00	 0.00	3.63	 0.13	3.56	 -0.44	0.33	 -0.17
	DCR	<1%	4.00	NA	4.50	NA	4.00	NA	0.50	NA

TOC and FOC scores indicate score for respondents commenting specifically on route .

N/A in trend data occurs where TOC or FOC did not comment on route last year.

# Customer service attributes by route

Mean Scores	Safety		Effectiveness in communication	Customer Driven	Prepared to challenge	Taking ownership	Working collaboratively	Delivering	Openness and engagement	Long term strategic needs	Capability to learn
	2014	2013/14 +/-	2014	2014	2014	2014	2014	2014	2014	2014	2014
Total mean score	4.08	🟡 -0.01	3.22	2.60	3.47	3.13	3.43	2.55	3.28	3.25	2.68
Route average	3.96	🔴 -0.11	3.30	2.60	3.52	3.03	3.40	2.56	3.33	3.23	2.64
Anglia	3.75	🟢 0.39	3.36	2.50	3.65	2.91	3.36	2.47	3.28	2.92	2.35
Wales	3.66	🔴 -0.40	3.44	2.69	3.77	2.93	3.19	2.30	3.28	3.40	2.45
Wessex	3.71	🔴 -0.52	3.39	2.68	3.44	2.89	3.28	2.79	3.46	3.22	2.74
Western	4.29	🟢 0.22	3.41	2.89	3.66	3.08	3.82	2.61	3.40	3.44	2.58
LNW	4.00	🔴 -0.27	3.02	2.45	3.29	3.17	3.29	2.49	3.14	3.36	2.63
LNE & EM	4.01	🟢 0.04	3.30	2.71	3.48	3.32	3.57	2.65	3.36	3.47	2.87
South East	4.35	🟢 0.21	3.44	2.71	3.52	3.23	3.69	2.71	3.66	3.13	2.84
Scotland	3.88	🟢 0.11	3.05	2.18	3.35	2.71	2.96	2.44	3.07	2.89	2.67

Q4. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail in the following areas?

# Activity area satisfaction by route

Mean Scores	Route operations		Infrastructure maintenance		Franchised stations & depots		Managed stations		Access planning		Timetable planning		Strategic route planning		Delivery of Enhancements	
	2013/14		2013/14		2013/14		2013/14		2013/14		2013/14		2013/14		2013/14	
	2014	+/-	2014	+/-	2014	+/-	2014	+/-	2014	+/-	2014	+/-	2014	+/-	2014	+/-
Total mean score	3.26	-0.16	2.81	-0.14	3.20	-0.21	3.12	-0.17	2.78	0.02	3.08	0.17	3.49	0.11	2.67	-0.35
Route average	3.22	-0.20	2.71	-0.15	3.13	-0.37	3.15	-0.23	2.77	-0.06	3.15	0.15	3.35	0.03	2.58	-0.41
Anglia	3.58	-0.34	2.36	-0.82	2.74	-0.25	2.48	-1.04	2.83	-0.58	3.46	0.15	3.32	0.26	2.24	-0.56
Wales	2.90	-0.50	2.73	-0.32	2.96	-0.45	3.27	-0.10	2.73	0.20	3.02	0.54	3.25	-0.08	2.03	-0.36
Wessex	3.23	0.06	2.70	0.00	2.89	-1.00	3.26	-0.24	2.83	0.09	2.92	0.10	3.17	-0.06	2.73	-0.87
Western	2.75	-0.40	2.76	-0.10	3.40	-0.27	3.24	0.23	2.59	-0.14	2.97	-0.05	3.13	-0.28	2.74	-0.61
LNW	3.36	-0.22	3.01	-0.36	3.31	0.04	2.90	-0.18	2.69	-0.33	3.08	0.13	3.76	0.12	2.91	0.04
LNE & EM	3.41	0.16	3.10	0.45	3.10	-0.42	3.16	-0.33	3.10	0.55	3.21	0.47	3.67	0.41	2.80	-0.17
South East	3.24	-0.47	2.32	-0.30	3.45	-0.37	3.53	-0.13	2.90	-0.16	2.87	-0.75	3.34	0.01	2.76	-0.38
Scotland	3.32	0.31	2.71	-0.12	3.21	0.15	3.34	0.30	2.50	-0.09	2.67	0.15	3.18	-0.15	2.46	-0.29

Q21. How satisfied or dissatisfied are you with Network Rail performance with respect to...?