



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

Route Report: London North East and East  
Midlands

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)
- 111 customers chose to answer about LNE&EM.

# *Route Summary*

# Summary

## Key Findings

- London North East and East Midlands is the best performing route in terms of key satisfaction and advocacy measures.
- All customer service and activity area attributes perform well relative to the overall average.
- LNE&EM performs above average across the majority of activity areas.

### Action Areas

1. Improving capability to learn, delivering on promises and being customer driven are key drivers to increasing satisfaction.
2. Effective communication and taking ownership have also been identified as action areas. The verbatim suggests that a lack of clear communication appears to be a key issue for LNE&EM customers due to the high turnover of contacts at Network Rail.

## 48% Overall Satisfaction

Overall satisfaction has decreased by 10% this year, however scores relatively well compared to other routes.

## 51% Route Satisfaction

Route satisfaction is relatively high for LNE&EM compared to the national average of 38%, but has dropped 12% points

## 55% Train Service Performance

Train service performance has seen a significant increase of 28% points since last year.

## 18% Advocacy

Advocacy remains relatively consistent, with only a 1% point decrease since last year.

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

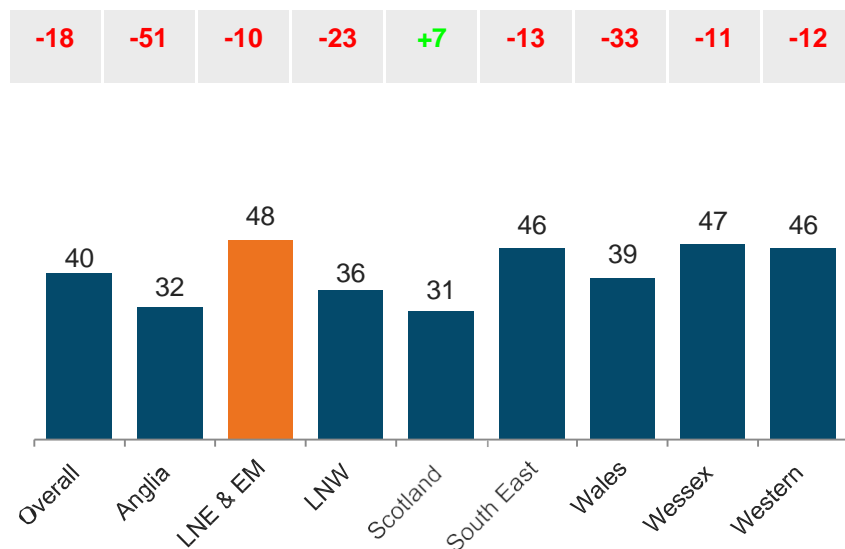
# ***Route compared with overall findings***

# Key scores

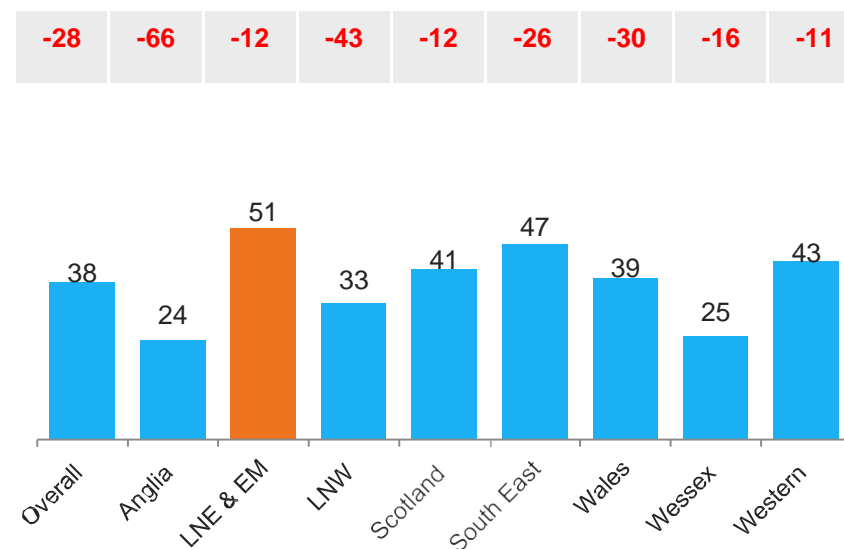
Customers on the London North East and East Midlands route are the most satisfied, both overall and at route level. However, satisfaction has still dropped notably since last year.

% change since 2013

**Overall satisfaction**  
% satisfied



**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



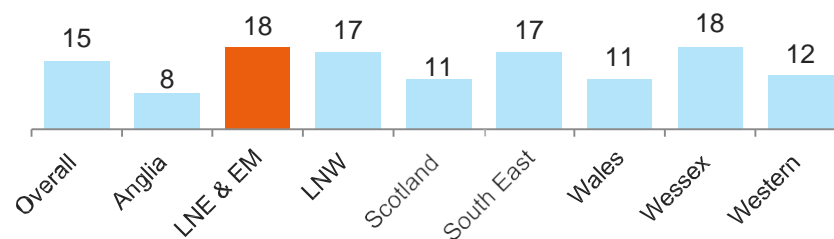
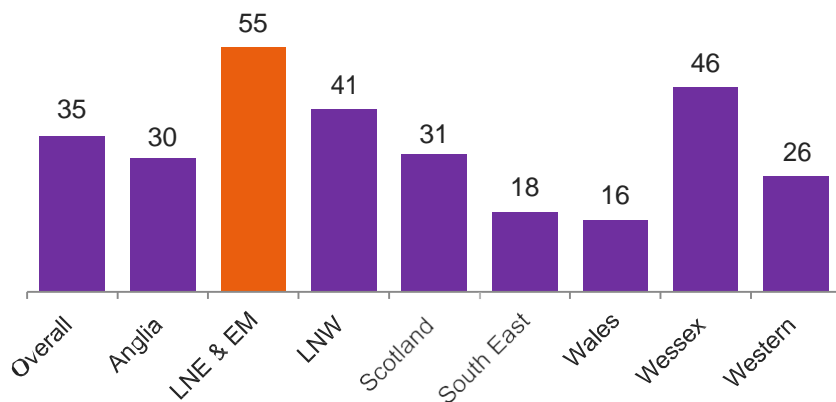
# Key scores

Satisfaction with train service performance has substantially increased for LNE&EM route customers since last year and is the highest of all routes.

**Satisfaction with train service performance**  
% satisfied

**Advocacy**  
% would speak highly

% change since 2013



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

# Customer service attributes satisfaction

London North East and East Midlands performs on par with or above average across all customer service attributes, scoring particularly well for focusing on long term strategic needs

Overall versus Route: % satisfied

	Overall	LNE & EM	Gap*
Works collaboratively	56	63	+7
Prepared to challenge	53	58	+5
Openness and engagement	50	50	0
Effective communication	46	49	+3
Focus on long term strategic needs	46	60	+14
Takes ownership	42	52	+10
Learns and applies lessons learnt	26	28	+2
Customer driven	23	26	+3
Delivers what it says	22	28	+6

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

All attributes are higher than the overall national average, with access planning and infrastructure maintenance renewals performing relatively well

Overall versus Route: % satisfied

	Overall	LNE & EM	Gap*
Route operations	40	46	+6
Strategic Route planning	32	40	+8
Managed stations	29	30	+1
Franchised stations and depots	28	30	+2
Delivery of enhancements projects	28	29	+1
Timetable planning	26	30	+4
Infrastructure maintenance and renewals	25	36	+11
Access planning	18	28	+10

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

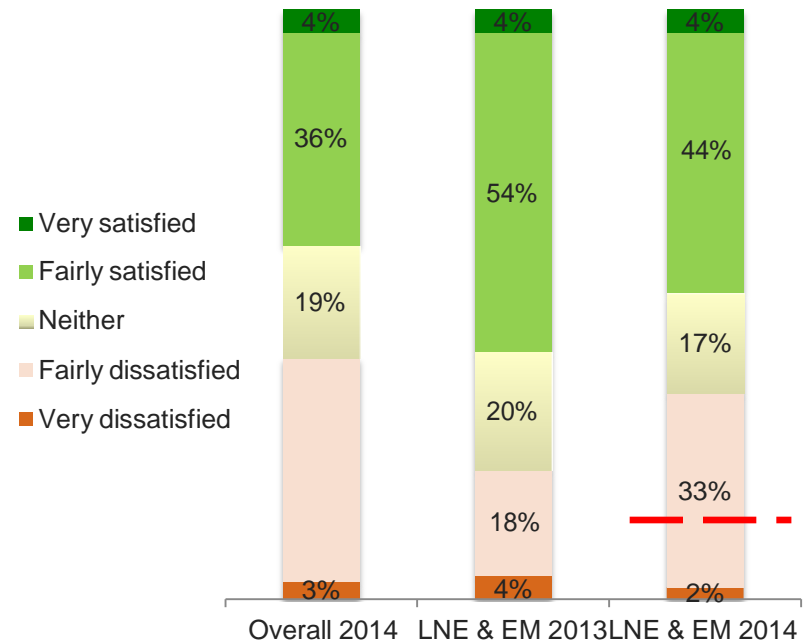
London North East and East Midlands has declined notably since 2012 but is still the best performing route in terms of overall satisfaction with Network Rail

Overall satisfaction: year on year



LNE & EM overall satisfaction: response breakdown compared with previous year

Mean = 3.00    Mean = 3.36    Mean = 3.15



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

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?

## Reasons for overall satisfaction/dissatisfaction

A large green circle containing the text "48 %".

48 %

of LNE & EM customers claim to be satisfied.

The key reasons are **good working relationships, an increasing focus on the customer**

A large red circle containing the text "35 %".

35 %

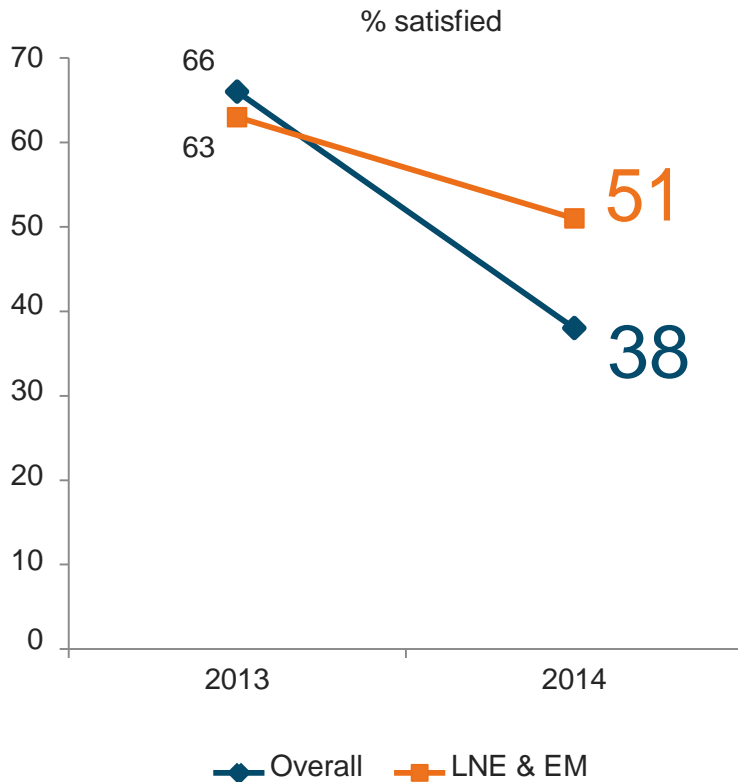
of LNE & EM customers claim to be dissatisfied.

The key reasons are **internal communication problems, the tendency to pass blame and response to issues**

# Route satisfaction

Route satisfaction for London North East and East Midlands has decreased by 12 % points since last year but is 13% points above national average

Route satisfaction: year on year

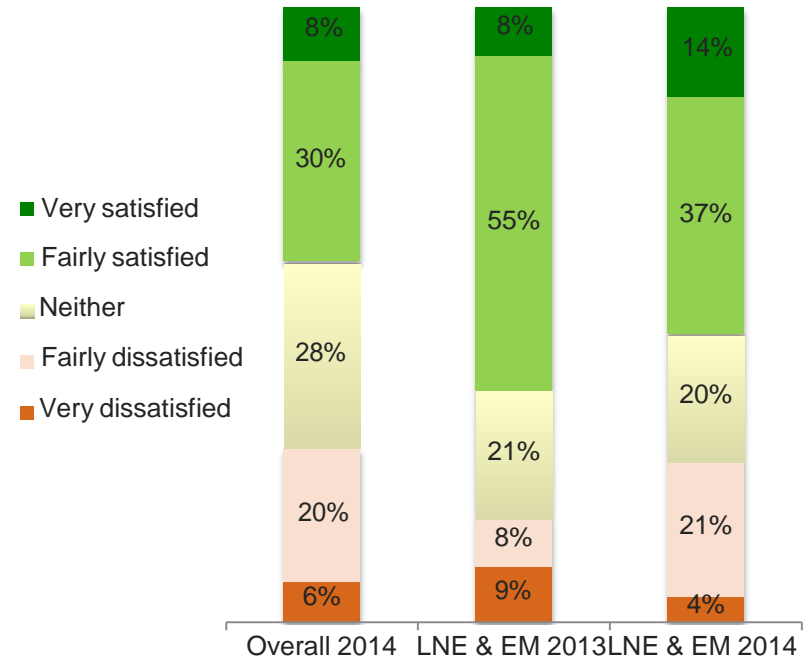


LNE & EM overall satisfaction:

response breakdown

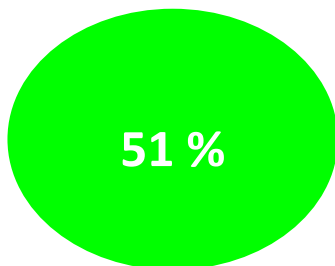
compared with previous year

Mean = 3.17    Mean = 3.45    Mean = 3.36

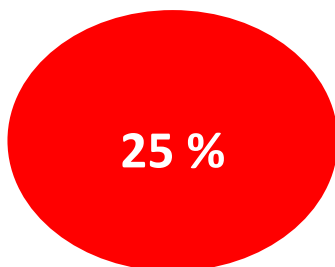


Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

## Reasons for route satisfaction/dissatisfaction



of LNE&EM customers claim to be satisfied.  
The key reasons are **high level of customer engagement and responsive to issues**



of LNE&EM customers claim to be dissatisfied.  
The key reasons are **low level of support, lack of continuity in relationships**



# Overall train service performance

Satisfaction has increased by 28 points since 2013 and is significantly above the overall average

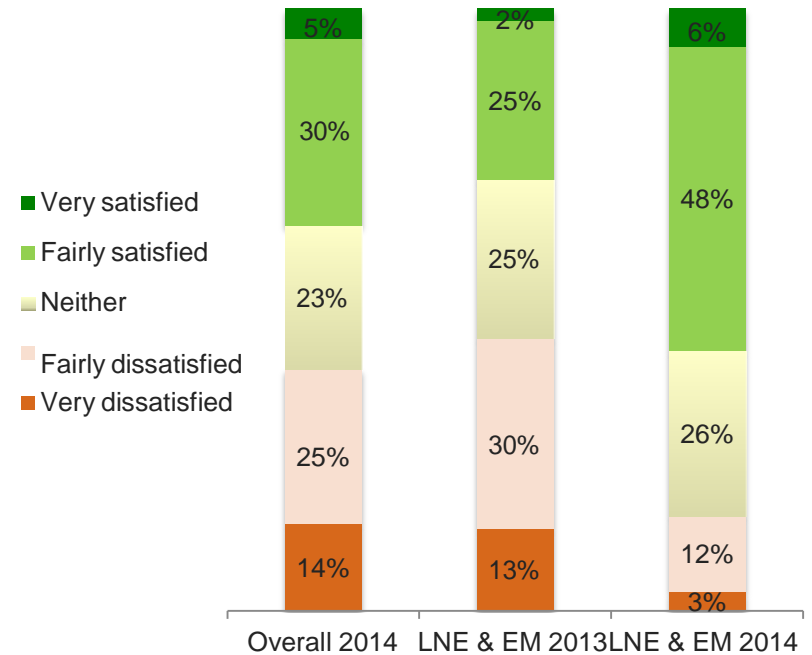
Satisfaction with train service performance:



LNE & EM train service performance - response breakdown

compared with previous year

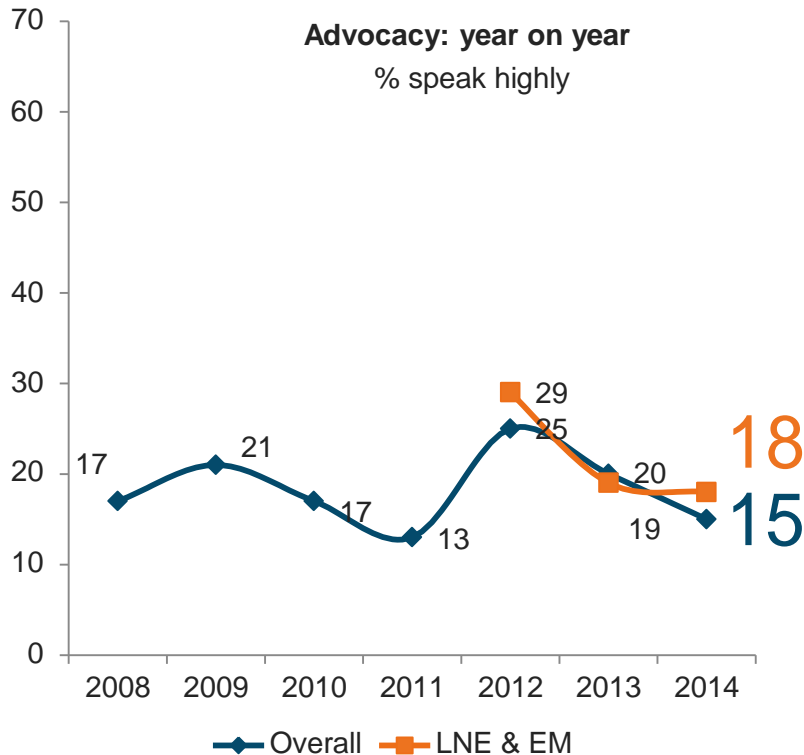
Mean = 2.87    Mean = 2.70    Mean = 3.43



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

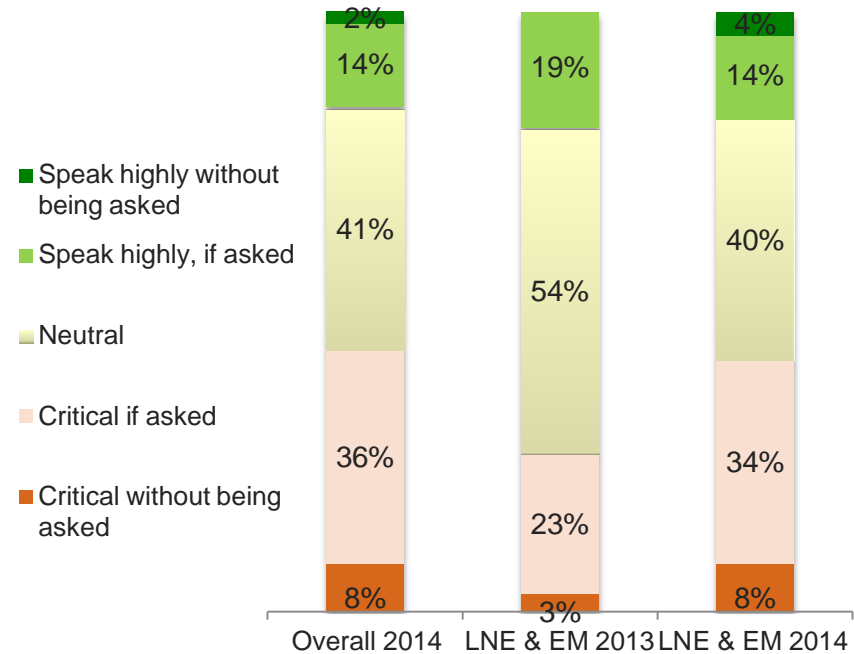
# Advocacy: Whether customers would speak highly or critically of Network Rail

The proportion of London North East and East Midlands customers who would speak highly about Network Rail is broadly in line with the overall average



LNE & EM advocacy - response breakdown compared with previous year

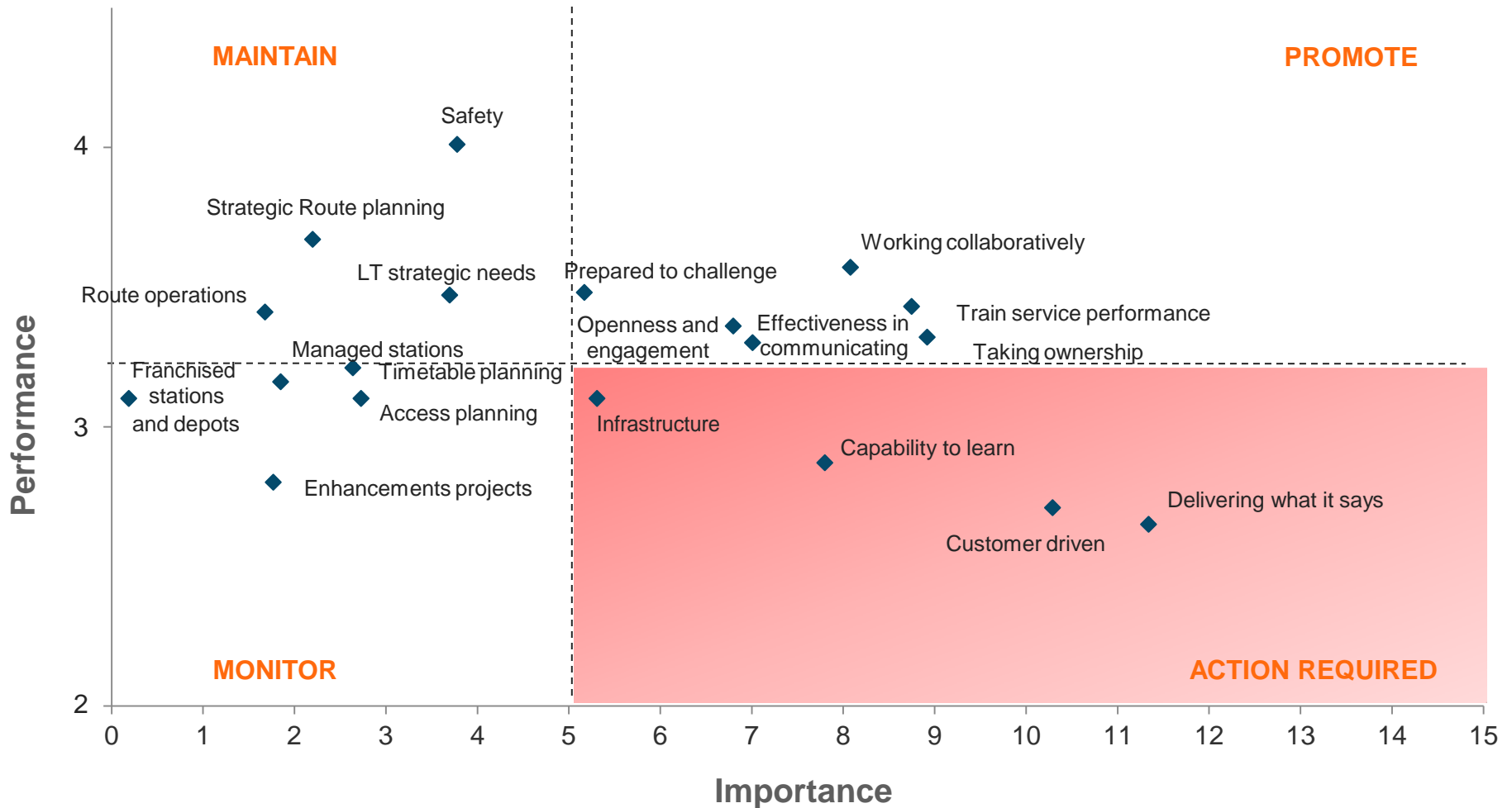
Mean = -0.35    Mean = -0.10    Mean = -0.28



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***

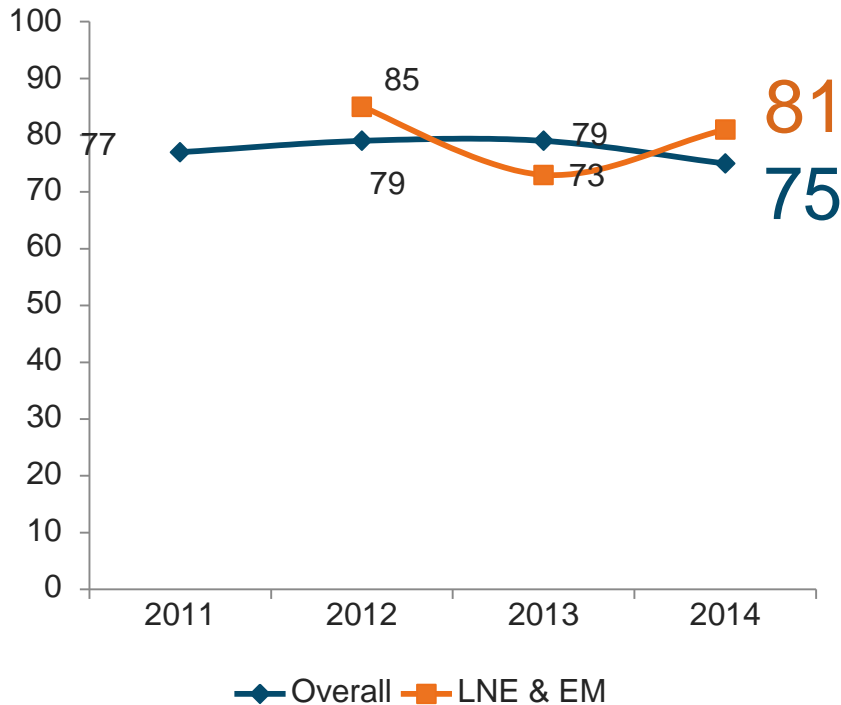
# Drivers of satisfaction against route performance: LNE&EM



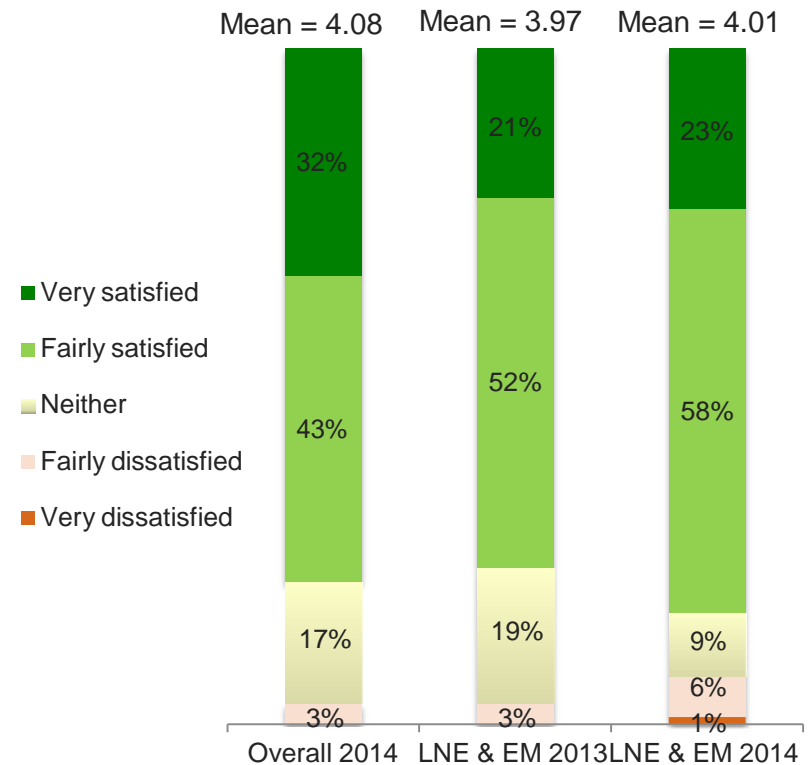
# Satisfaction with safety

Satisfaction with safety for London North East and East Midlands has increased to 81% this year, above the overall average

Satisfaction with safety:  
year on year  
% satisfied

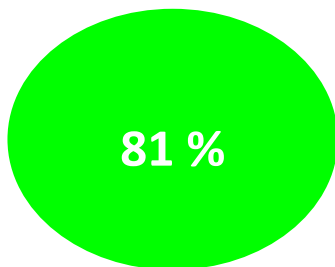


LNE & EM satisfaction with safety - response breakdown compared with previous year



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*

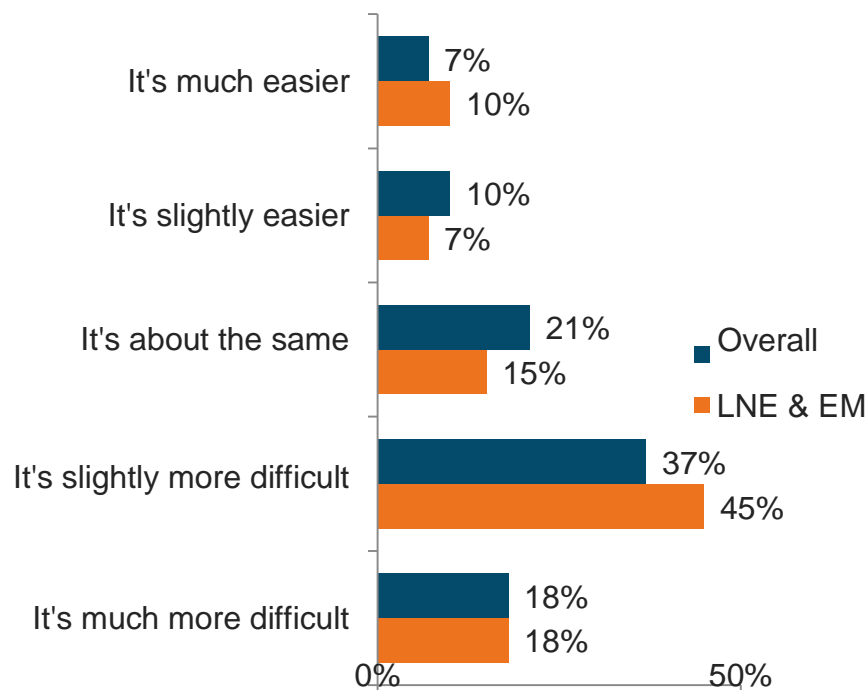


of LNE & EM customers claim to be satisfied with safety.

The key reasons is that **safety is evidently a top priority for Network Rail**

# Working with Network Rail compared to other organisations

63% of LNE&EM customers view working with Network Rail as relatively more difficult, more so than the overall average of 56%



















































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	<b>2.98</b>	 <b>-0.46</b>	3.10	 <b>-0.37</b>	<b>2.81</b>	 0.00	<b>-0.36</b>	 <b>-0.27</b>
FOC	3.19	 0.09	3.48	 <b>-0.10</b>	3.50	 0.31	<b>-0.19</b>	 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	 <b>-0.83</b>	3.10	 <b>-1.12</b>	2.83	 <b>-0.97</b>	<b>-0.29</b>	 <b>-0.67</b>
Wales	<b>2.98</b>	 <b>-0.74</b>	3.11	 <b>-0.75</b>	<b>2.53</b>	 <b>-0.42</b>	<b>-0.41</b>	 <b>-0.25</b>
Wessex	3.16	 <b>-0.48</b>	3.18	 <b>-0.19</b>	3.24	 0.61	<b>-0.23</b>	 <b>-0.06</b>
Western	3.28	 <b>-0.32</b>	3.25	 <b>-0.07</b>	<b>2.73</b>	 0.23	<b>-0.26</b>	 <b>-0.07</b>
LNW	<b>2.85</b>	 <b>-0.66</b>	<b>2.88</b>	 <b>-0.96</b>	<b>2.96</b>	 0.10	<b>-0.52</b>	 <b>-0.54</b>
LNE & EM	3.15	 <b>-0.21</b>	3.36	 <b>-0.09</b>	3.43	 0.73	<b>-0.28</b>	 <b>-0.18</b>
South East	3.14	 <b>-0.33</b>	3.28	 <b>-0.44</b>	<b>2.30</b>	 <b>-0.11</b>	<b>-0.19</b>	 0.02
Scotland	<b>2.80</b>	 0.03	3.23	 <b>-0.01</b>	<b>2.91</b>	 0.21	<b>-0.43</b>	 <b>-0.08</b>

# 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>3.15</b>	-0.21	<b>3.36</b>	-0.09	<b>3.43</b>	0.73	<b>-0.28</b>	-0.18
TOC	Northern Rail	20%	3.43	-0.48	3.43	-0.39	3.57	0.46	<b>-0.57</b>	-0.48
	East Coast	16%	3.38	-0.12	3.88	0.50	3.75	1.75	0.13	-0.12
	East Midlands Trains	16%	<b>2.58</b>	-0.71	<b>2.58</b>	-1.21	3.17	0.10	<b>-0.50</b>	-0.50
	GTR	15%	<b>2.86</b>	0.23	3.57	1.07	3.17	1.29	<b>-0.14</b>	0.49
	CrossCountry	9%	<b>2.67</b>	-0.83	3.33	0.23	3.00	0.40	<b>-0.33</b>	-0.53
	Transpennine Express	7%	3.00	-0.11	3.11	-0.56	<b>2.63</b>	0.13	<b>-0.44</b>	0.00
	DB Tyne & Wear	2%	<b>4.67</b>	1.34	<b>4.33</b>	0.66	<b>4.33</b>	0.66	0.67	0.34
	Grand Central	2%	3.80	0.80	3.40	-0.10	3.80	0.80	<b>-0.20</b>	0.05
	Hull Trains	1%	3.00	0.00	<b>2.50</b>	-1.00	<b>4.00</b>	2.00	<b>-1.50</b>	-1.50
	North Yorkshire Moors	<1%	<b>4.00</b>	0.00	<b>4.00</b>	0.00	<b>4.00</b>	0.00	<b>-1.00</b>	-1.00
	First ScotRail	<1%	<b>2.00</b>	-1.00	3.00	0.00	<b>4.00</b>	1.00	<b>-1.00</b>	-1.00
London Underground	<1%	<b>4.00</b>	1.00	<b>2.00</b>	-1.00	3.00	2.00	0.00	0.00	
FOC	DB Schenker	5%	3.25	-0.75	<b>2.92</b>	-0.58	3.75	0.46	<b>-0.19</b>	-0.05
	Freightliner Heavy Haul	3%	<b>2.80</b>	0.80	<b>4.25</b>	1.75	3.75	0.25	0.20	1.20
	GB Railfreight	2%	<b>4.00</b>	0.33	3.56	-0.61	3.56	-0.27	0.33	-0.17
	Freightliner Ltd	1%	<b>2.50</b>	0.00	3.50	1.00	<b>2.75</b>	-0.75	<b>-1.13</b>	-0.13
	Colas	<1%	<b>4.00</b>	1.00	<b>4.00</b>	0.00	3.50	0.00	0.50	0.50
	DirectRail Services	<1%	3.00	N/A	3.57	3.57	3.10	3.10	<b>-0.40</b>	-0.40
	DCR	<1%	<b>4.00</b>	N/A	<b>2.50</b>	2.50	<b>4.00</b>	4.00	<b>0.50</b>	0.50

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
<b>Total mean score</b>	<b>4.08</b>	-0.01	<b>3.22</b>	<b>2.60</b>	<b>3.47</b>	<b>3.13</b>	<b>3.43</b>	<b>2.55</b>	<b>3.28</b>	<b>3.25</b>	<b>2.68</b>
<b>Route average</b>	<b>3.96</b>	-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	+/-
<b>Total mean score</b>	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
<b>Route average</b>	<b>3.22</b>	<b>-0.20</b>	<b>2.71</b>	<b>-0.15</b>	<b>3.13</b>	<b>-0.37</b>	<b>3.15</b>	<b>-0.23</b>	<b>2.77</b>	-0.06	<b>3.15</b>	0.15	<b>3.35</b>	<b>0.03</b>	<b>2.58</b>	<b>-0.41</b>
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...?