



Network Rail 2014 Customer Survey Report

Route Report: London North West

Prepared by: 

January 2015

Contents

- Methodology and sample
- Route summary
- Route compared with overall findings
- Route key scores
- Additional findings
- Appendix



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 29th and 13th 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)
- 121 customers chose to answer about London North West.

Route Summary

Summary

Key Findings

- Both overall and route satisfaction have declined significantly for London North West, and scores are below the overall national average on both metrics.
- London North West performs above average in the majority of activity areas but scores less well in a number of customer service attributes such as collaborative working, being prepared to challenge and openness and engagement.
- Satisfaction with safety has dropped sharply since from 88% to 70%.

Action Areas

1. Delivering on promises, being more customer driven, capability to learn and train service performance are key action areas impacting on satisfaction.
2. Safety is in decline and an area of concern
3. Openness and engagement, collaborative working and effective communication are also areas to improve

36% Overall Satisfaction

Overall satisfaction is low and has seen a sharp decline since last year (-23% points)

33% Route Satisfaction

Route satisfaction is broadly in line with the average of 35% but has declined by 43% points since last year

41% Train Service Performance

Train service performance has seen an increase of 13% points since last year and performs relatively well

17% Advocacy

Advocacy remains relatively consistent, with only a slight dip since last year (-3% points)

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

Route compared with overall findings

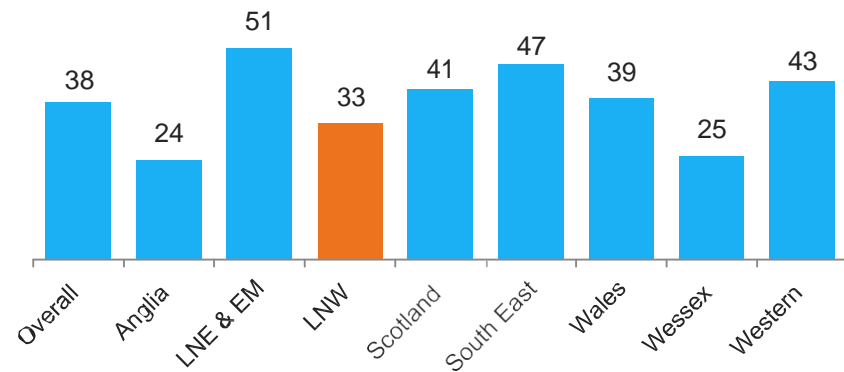
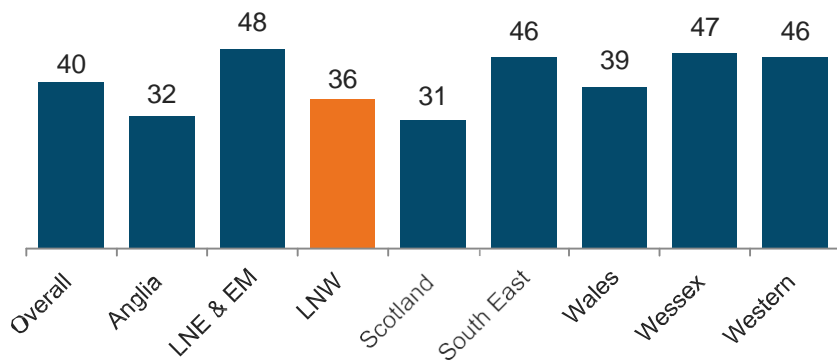
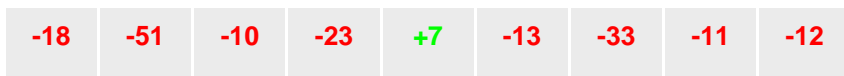
Key scores

London North West scores have notably decreased this year and are below average for both overall and route satisfaction

Overall satisfaction
% satisfied

Route satisfaction
% satisfied

% change since 2013



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

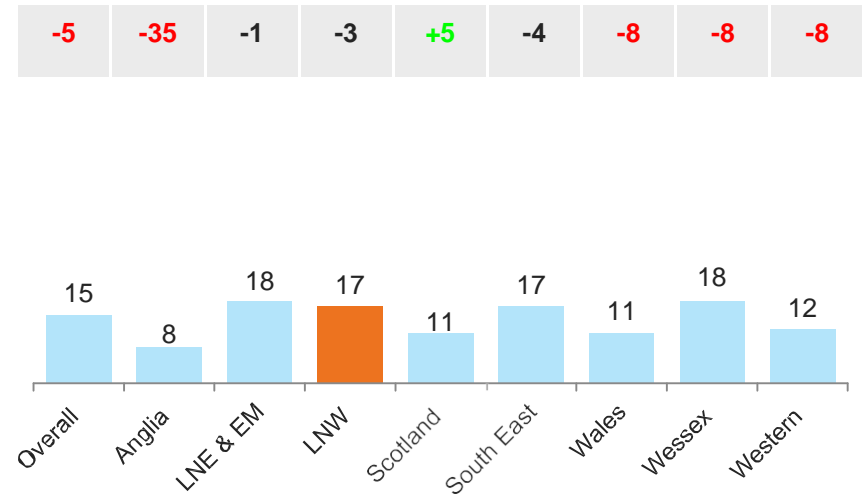
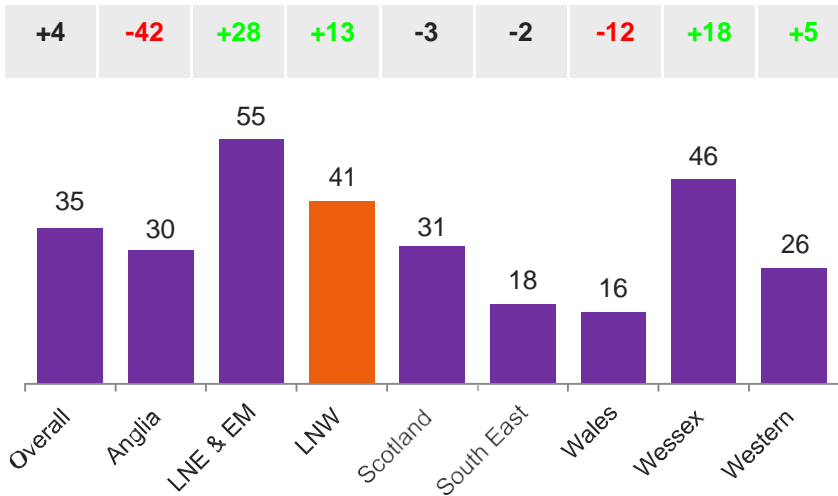
Key scores

Train service performance has improved for London North West since last year and is above the overall average. Advocacy is low, but slightly higher than average

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 West scores significantly below average on a number of customer service attributes

Overall versus Route: % satisfied

	Overall	LNW	Gap*
Works collaboratively	56	45	-11
Prepared to challenge	53	39	-14
Openness and engagement	50	43	-7
Effective communication	46	41	-5
Focus on long term strategic needs	46	51	+5
Takes ownership	42	45	+3
Learns and applies lessons learnt	26	24	-2
Customer driven	23	20	-3
Delivers what it says	22	19	-3

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

London North West performs above average on all activity area attributes and scores particularly well for strategic route planning

Overall versus Route: % satisfied

	Overall	LNW	Gap*
Route operations	40	44	+4
Strategic Route planning	32	43	+11
Managed stations	29	27	-2
Franchised stations and depots	28	36	+8
Delivery of enhancements projects	28	35	+7
Timetable planning	26	30	+4
Infrastructure maintenance and renewals	25	28	+3
Access planning	18	19	+1

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

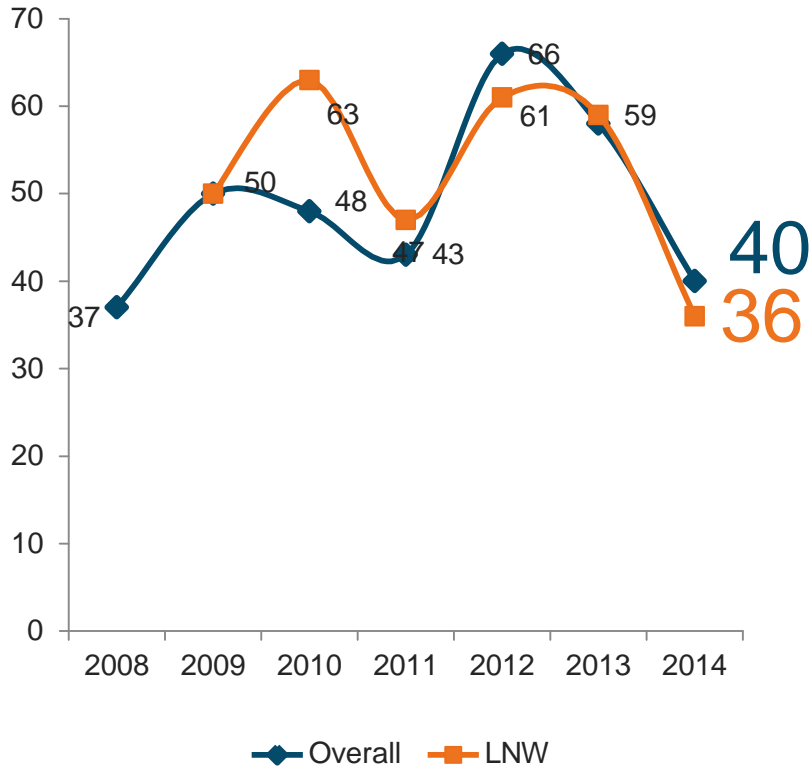
Route key scores

Overall satisfaction

London North West satisfaction has dropped by 23% this year and is slightly below the overall average at 36%

Overall satisfaction: year on year

% satisfied



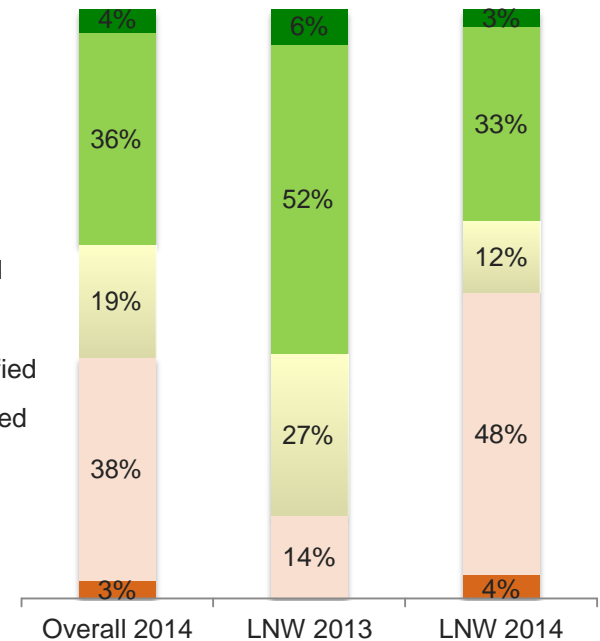
LNW overall satisfaction: response breakdown

response breakdown

compared with previous year

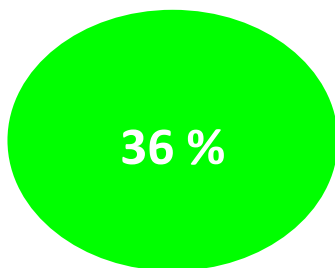
Mean = 3.00 Mean = 3.51 Mean = 2.85

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



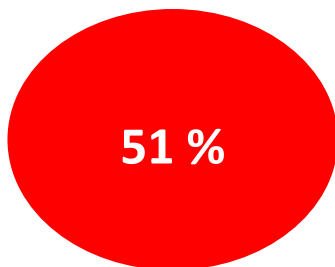
Q1. Taking into account all of your experiences with Network Rail during the last 12 months as a whole, how satisfied or dissatisfied are you with Network Rail?

Reasons for overall satisfaction/dissatisfaction



of LNW customers claim to be satisfied.

The key reasons are **responsiveness and working relationships**

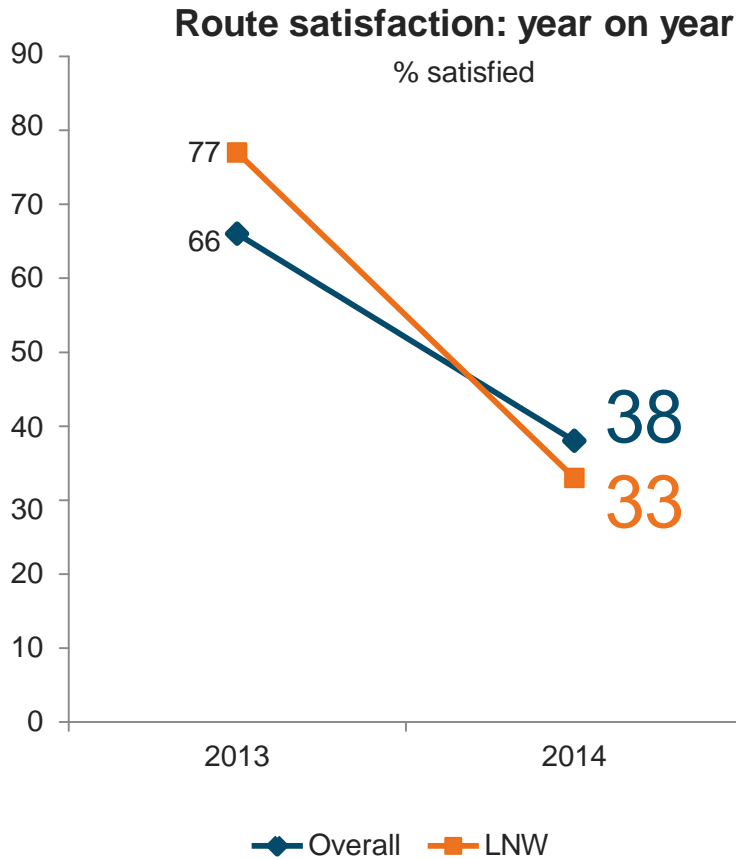


of LNW customers claim to be dissatisfied.

The key reasons are **misaligned objectives and a lack of customer understanding**

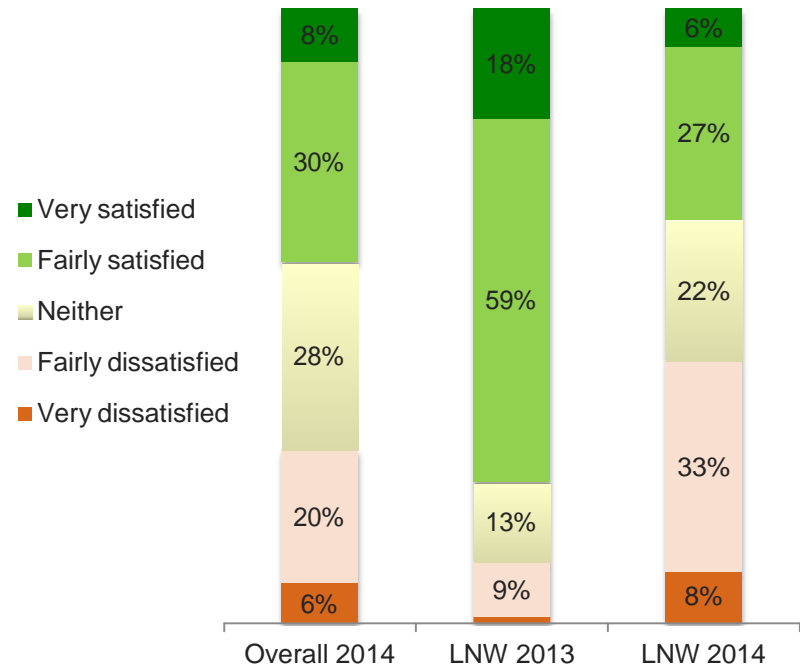
Route satisfaction

Satisfaction on the London North West route is below the overall average and has decreased notably since last year



LNW overall satisfaction: response breakdown compared with previous year

Mean = 2.97 Mean = 3.84 Mean = 2.88



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

Reasons for route satisfaction/dissatisfaction

A large green circle containing the text "33 %".

33 %

of LNW customers claim to be satisfied.

The key reasons are **capability to learn, understanding of customer needs and collaborative relationships**

A large red circle containing the text "41 %".

41 %

of LNW customers claim to be dissatisfied.

The key reasons are **a lack of transparency, a lack of cohesion within the Network Rail team and disengagement with smaller operators**

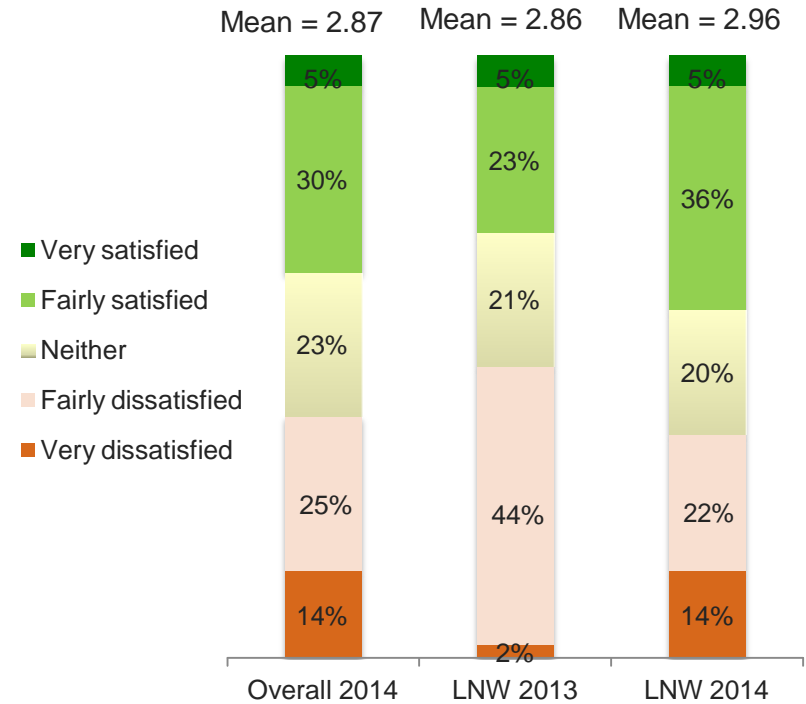
Overall train service performance

Train performance satisfaction has increased this year but the proportion of dissatisfied customers has also increased

Satisfaction with train service performance:
year on year
% satisfied



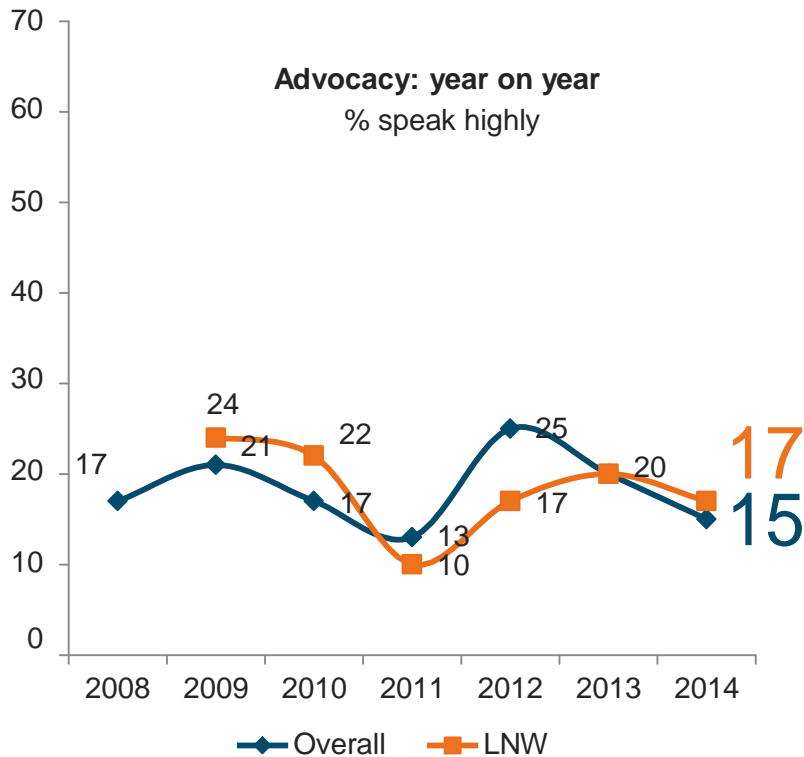
LNW train service performance - response breakdown
compared with previous year



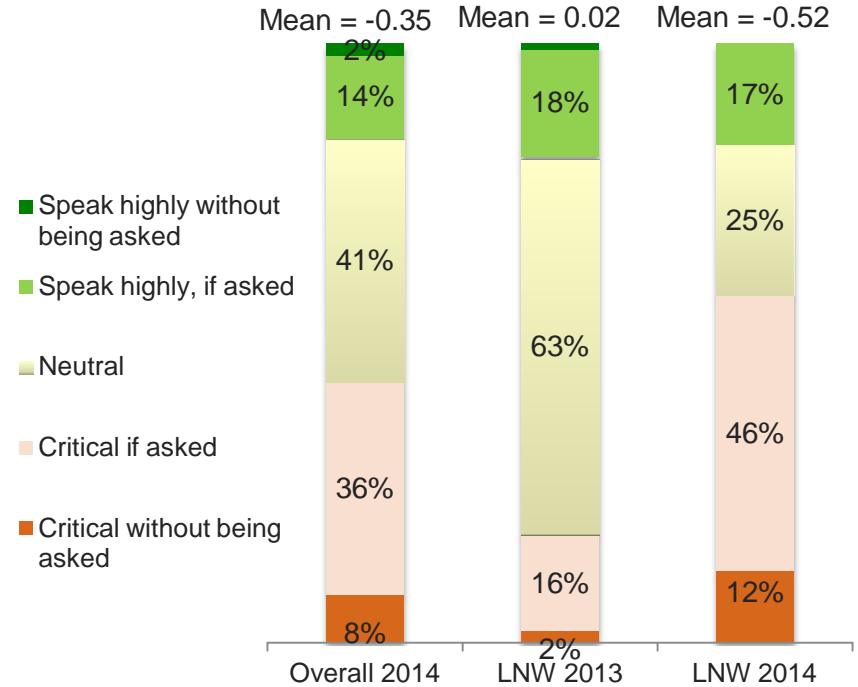
Q4c. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail's part in overall train service performance

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

Advocacy on London North West has decreased marginally and is in line with Network Rail overall



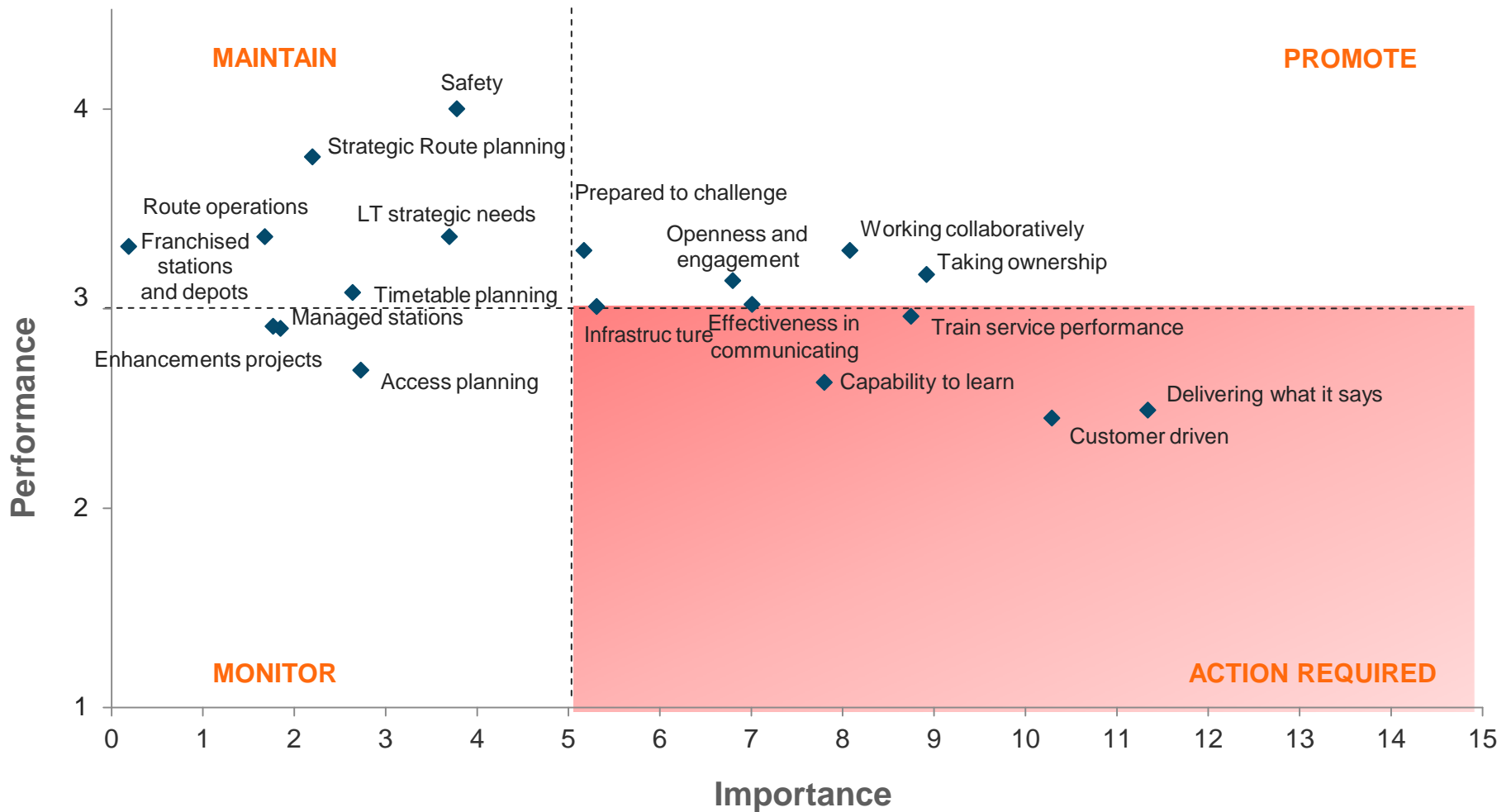
LNW advocacy - response breakdown compared with previous year



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

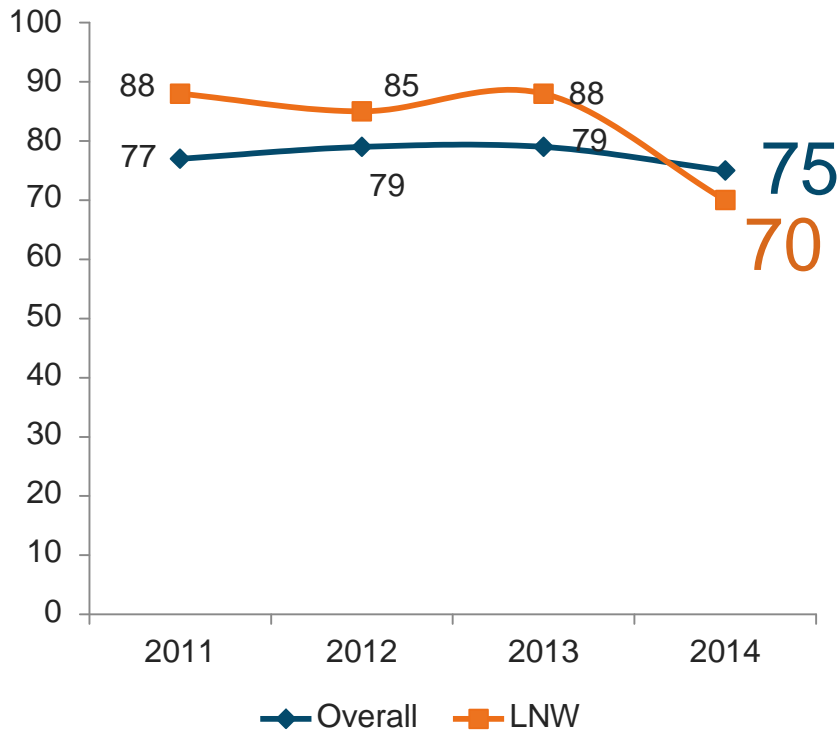
Drivers of satisfaction against route performance: LNW



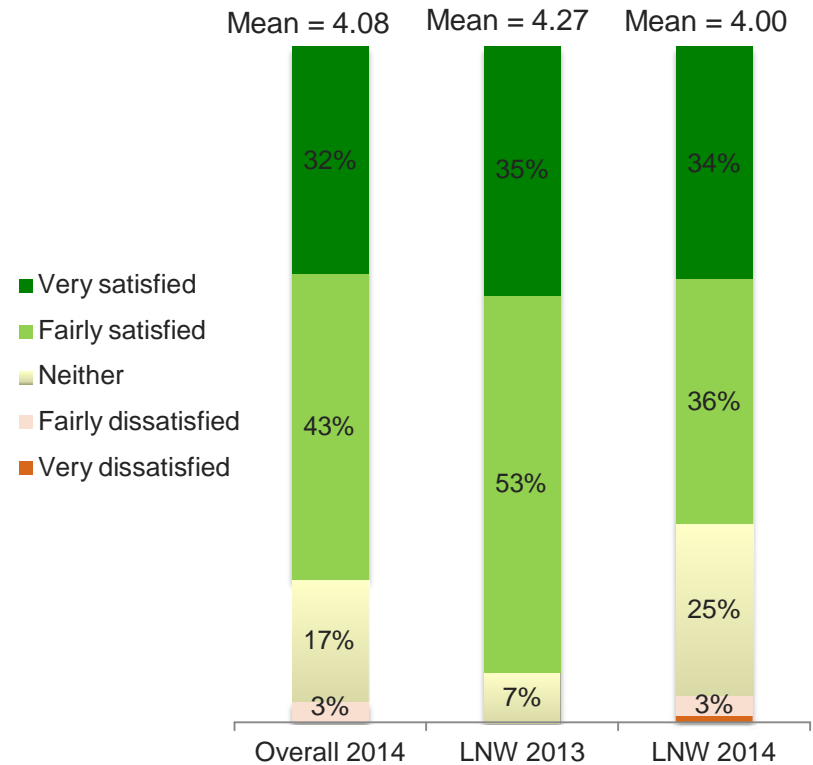
Satisfaction with safety

Satisfaction with safety has declined for London North West since last year and is now below overall average

Satisfaction with safety:
year on year
% satisfied

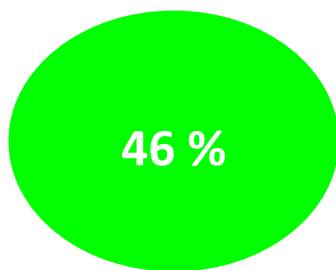


LNW satisfaction with safety - response breakdown compared with previous year



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

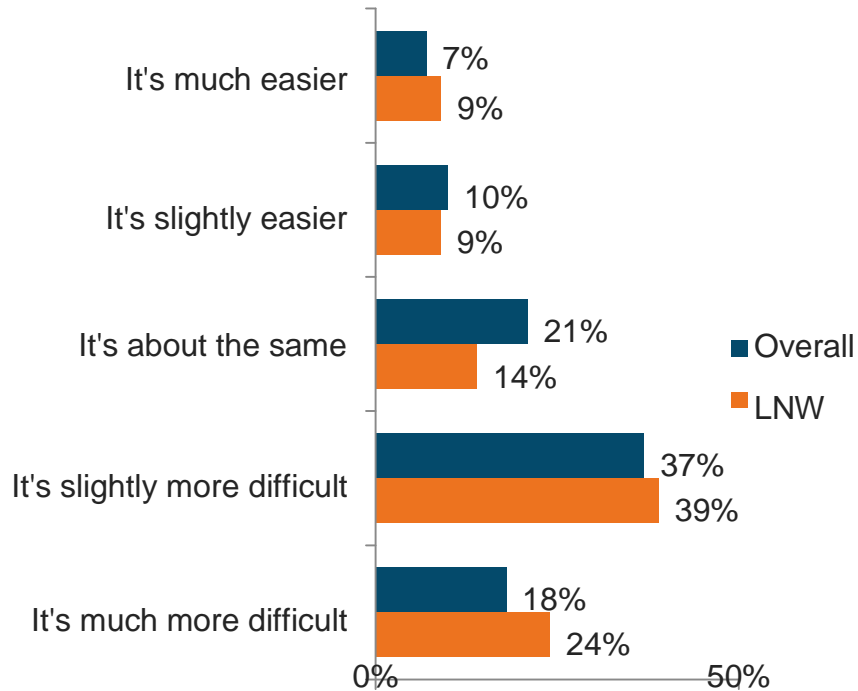


of LNW customers claim to be satisfied with safety.

The key reasons are **the perception that safety is a priority for Network Rail and is embedded into the organisation**

Working with Network Rail compared to other organisations

A high proportion feel it is more difficult working with Network Rail and London North West customers find it more difficult than average



















































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	
Total mean score	3.00	 -0.41	3.17	 -0.30	2.87	 0.03	-0.35	 -0.23
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
Route								
Route average	3.05	 -0.42	3.17	 -0.48	2.87	 0.12	-0.33	 -0.22
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 +/-
	Overall Route Score	Total	2.85	-0.66	2.88	-0.96	2.96	0.10	-0.52	-0.50
TOC	Arriva Trains Wales	3%	2.83	-0.46	3.00	0.14	2.33	-0.81	-0.67	-0.38
	Chiltern Railways	8%	4.38	-0.07	4.50	0.00	4.00	-0.56	0.75	-0.16
	CrossCountry	6%	2.33	-0.80	3.17	0.04	2.00	-0.38	-0.83	-0.83
	East Midlands Trains	1%	2.33	-0.67	2.67	-0.73	3.67	0.87	-0.67	-0.87
	GTR	<1%	2.00	N/A	2.00	N/A	-	N/A	-2.00	-2.00
	London Midland	18%	2.57	-0.48	2.57	-1.45	3.29	1.06	-1.00	-1.00
	London Overground	1%	3.00	0.00	3.00	0.60	3.00	0.00	-0.17	0.03
	London Underground	2%	4.00	1.00	2.00	-1.33	3.00	1.00	0.00	0.00
	Merseyrail	5%	3.38	-0.24	3.29	-0.25	3.38	-0.12	-0.38	-0.07
	Northern Rail	16%	3.25	-0.48	3.38	-0.44	3.75	0.64	-0.25	-0.16
	Transpennine Express	6%	3.00	0.00	2.89	-0.61	2.63	0.20	-0.44	0.06
Virgin Trains	25%	2.00	-1.75	1.83	-2.17	1.67	-1.08	-1.00	-1.13	
FOC	Colas	<1%	4.00	0.67	3.00	-1.67	3.50	-0.17	0.50	0.50
	DB Schenker	3%	3.25	-0.75	3.70	-0.10	3.75	0.75	-0.19	0.01
	DirectRail Services	1%	3.00	-1.00	3.60	-1.07	3.10	-0.15	-0.40	-0.65
	Freightliner Ltd	3%	2.50	0.17	3.00	0.00	2.75	-0.25	-1.13	-0.13
	Freightliner Heavy Haul	1%	2.80	0.80	4.00	0.00	3.75	0.25	0.20	1.20
	GB Railfreight	<1%	4.00	0.00	3.86	0.86	3.56	0.06	0.33	-0.17
	DCR	<1%	4.00	N/A	3.50	3.50	4.00	4.00	0.50	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
		Δ									
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...?