



Network Rail 2014 Customer Survey Report

Route Report: Scotland

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)
- 81 customers chose to answer about Scotland.

Route Summary

Summary

Key Findings

- Key metrics (overall & route satisfaction, train performance and advocacy) are low scoring, and generally behind the national average with the exception of route satisfaction
- Most customer service attributes are below average, particularly operator strategic needs and taking ownership.
- Managed stations score better than the overall average, but other activity areas are notably lower.

Action Areas

1. Taking ownership, delivering on promises and being more customer driven are key action areas impacting on satisfaction.
2. Openness and engagement is encouraging on the Scotland route and Network Rail should look to further improve this.
3. Improve performance with respect to infrastructure maintenance and renewals.

31% Overall Satisfaction

Overall satisfaction with Network Rail is relatively low, however this has increased slightly on the Scotland route, up 7% points since last year.

41% Route Satisfaction

Route satisfaction is slightly ahead of the national average at 41%, but has declined 12% points since 2013.

31% Train Service Performance

Train service performance is slightly below the national average and has remained relatively stable since 2013 (-3% points)

11% Advocacy

Advocacy remains low, with only 11% of customers speaking highly of Network Rail, however this has increased slightly since 2013 (+5% points).

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

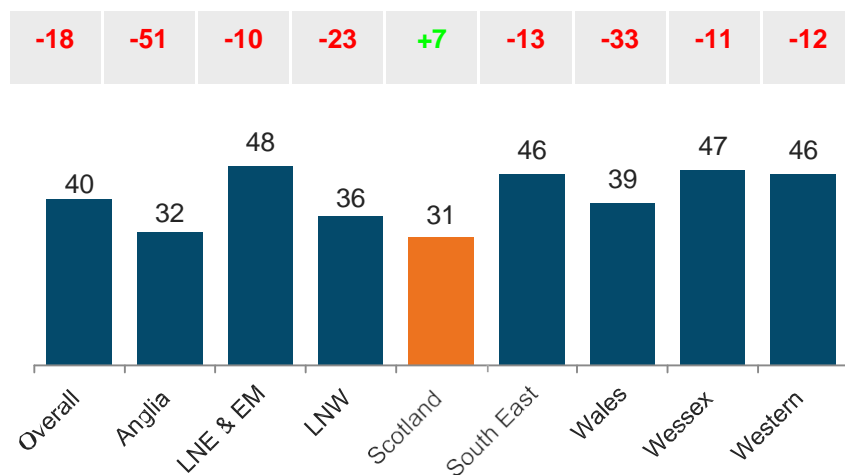
Route compared with overall findings

Key scores

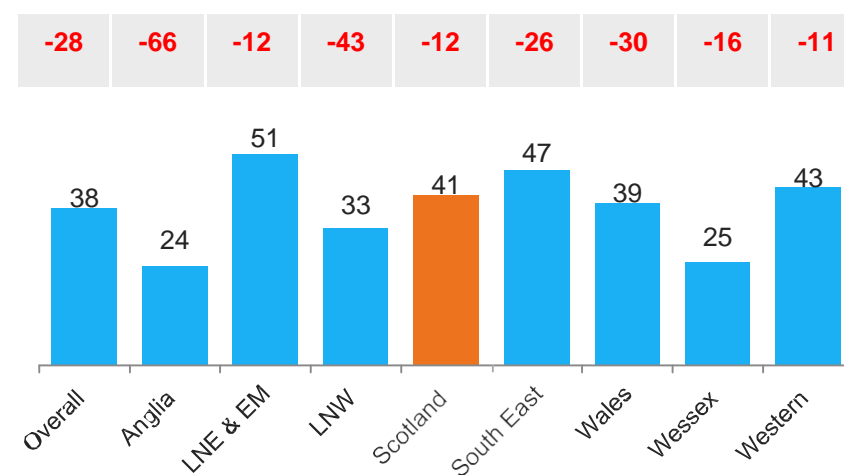
Overall satisfaction on Scotland route has increased 7% points since 2013, however route level satisfaction has declined 12% points

% 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

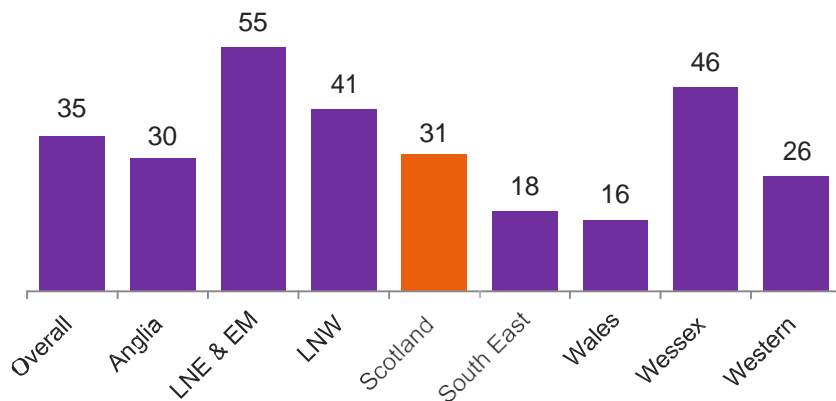
Green is an increase of 5% or more, Red is a decrease of 5% or more on 2013

Key scores

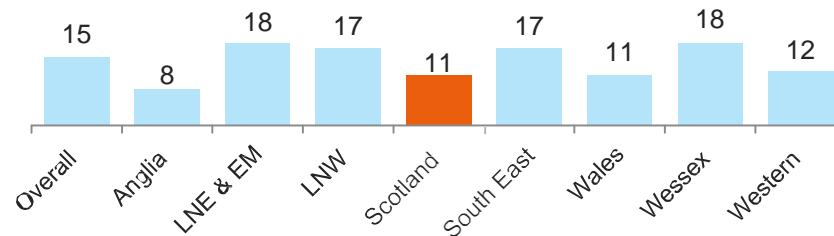
Satisfaction with train performance varies notably across the routes, suggesting there is an inconsistent customer service delivery. The proportion of customers that would speak highly of Network Rail on Scotland route is relatively low at 11%.

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

A number of customer service attributes are notably lower than average on the Scotland route, particularly the focus on long term strategic needs and taking ownership. However, openness and engagement with Network Rail performs above average

Overall versus Route: % satisfied

	Overall	Scotland	Gap*
Works collaboratively	56	38	-18
Prepared to challenge	53	45	-8
Openness and engagement	50	55	+5
Effective communication	46	39	-7
Focus on long term strategic needs	46	16	-30
Takes ownership	42	22	-20
Learns and applies lessons learnt	26	27	+1
Customer driven	23	5	-18
Delivers what it says	22	6	-16

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

Whilst satisfaction on the Scotland route is relatively high for Route operations and Managed stations, Strategic Route planning, Access and Timetable planning as well as infrastructure maintenance and renewals are notably lower than average

Overall versus Route: % satisfied

	Overall	Scotland	Gap*
Route operations	40	45	+5
Strategic Route planning	32	13	-19
Managed stations	29	44	+15
Franchised stations and depots	28	18	-10
Delivery of enhancements projects	28	19	-9
Timetable planning	26	12	-14
Infrastructure maintenance and renewals	25	11	-14
Access planning	18	3	-15

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

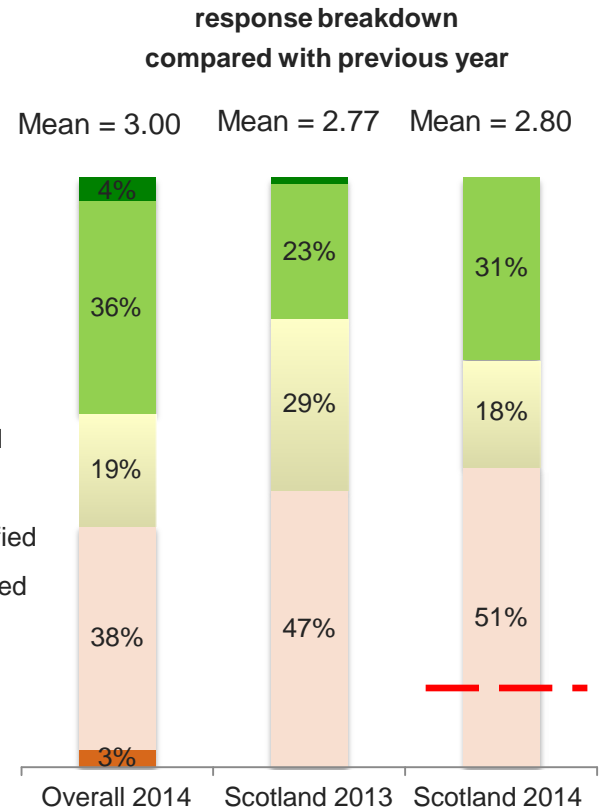
Overall satisfaction

Overall satisfaction with Network Rail has improved 7% points since 2013, and whilst an improvement is positive, the result is below the overall average

Overall satisfaction: year on year



Scotland overall satisfaction: response breakdown



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

Significant take outs from verbatim analysis: High praise for the local team (due to successful delivery during Commonwealth Games/Ryder Cup)



31 %

of Scotland customers claim to be satisfied.

The key reasons are **positive working relationships,**
Customer focus



51 %

of Scotland customers claim to be dissatisfied.

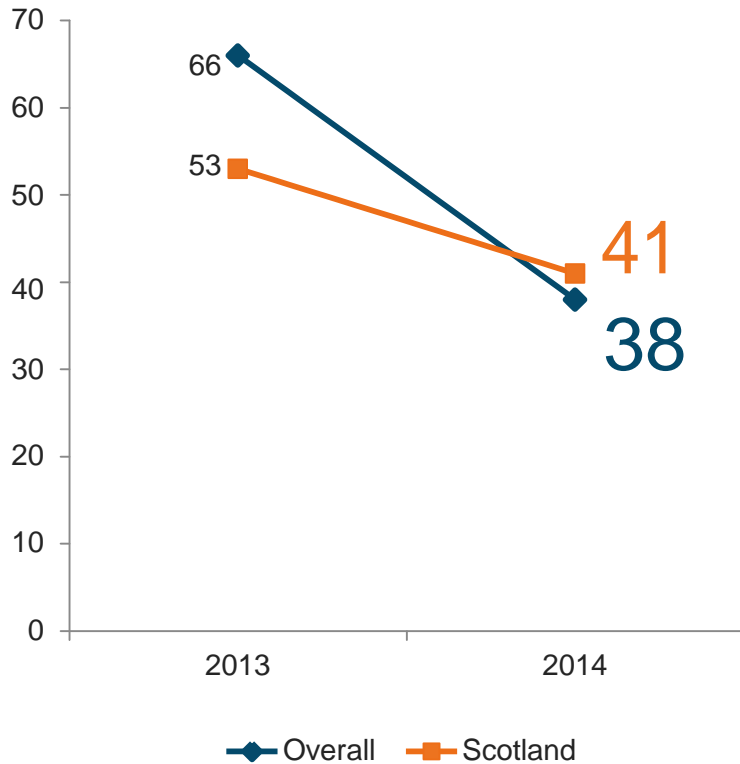
The key reasons are **Bureaucracy, Performance delivery,**
Customer relations

Route satisfaction

Satisfaction on the Scotland route has decreased 12% points since 2013 to 41%, which is broadly in line with the national average

Route satisfaction: year on year

% satisfied



Scotland overall satisfaction:

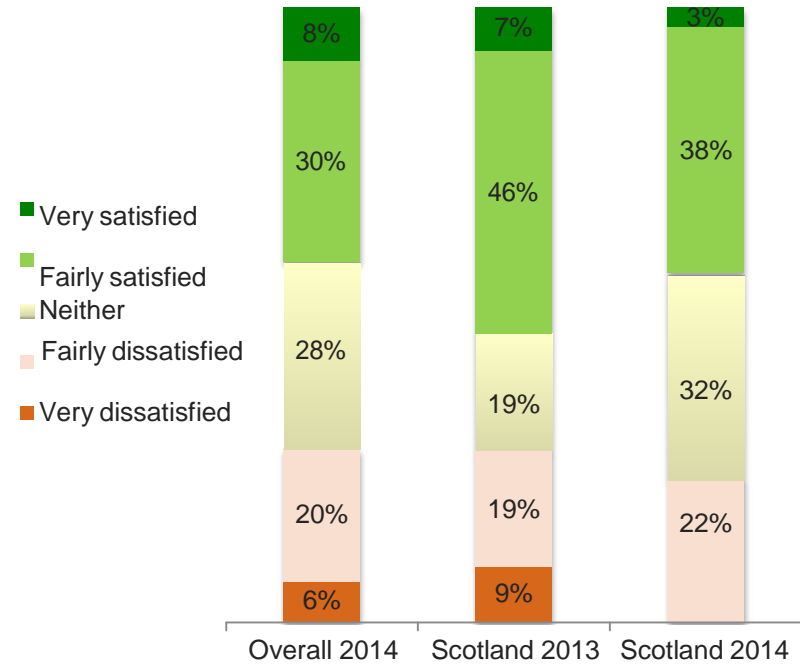
response breakdown

compared with previous year

Mean = 3.17

Mean = 3.24

Mean = 3.23



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

Reasons for route satisfaction/dissatisfaction



31 %

of Scotland customers claim to be satisfied.

The key reasons are **positive working relationships,**
customer focus



51 %

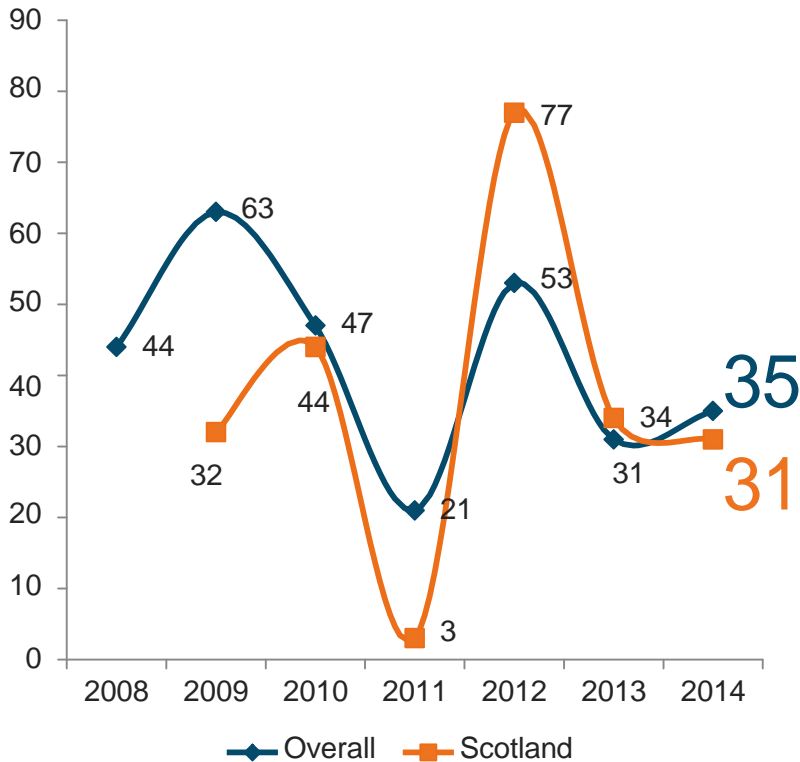
of Scotland customers claim to be dissatisfied.

The key reasons are **customer focus,**
communication

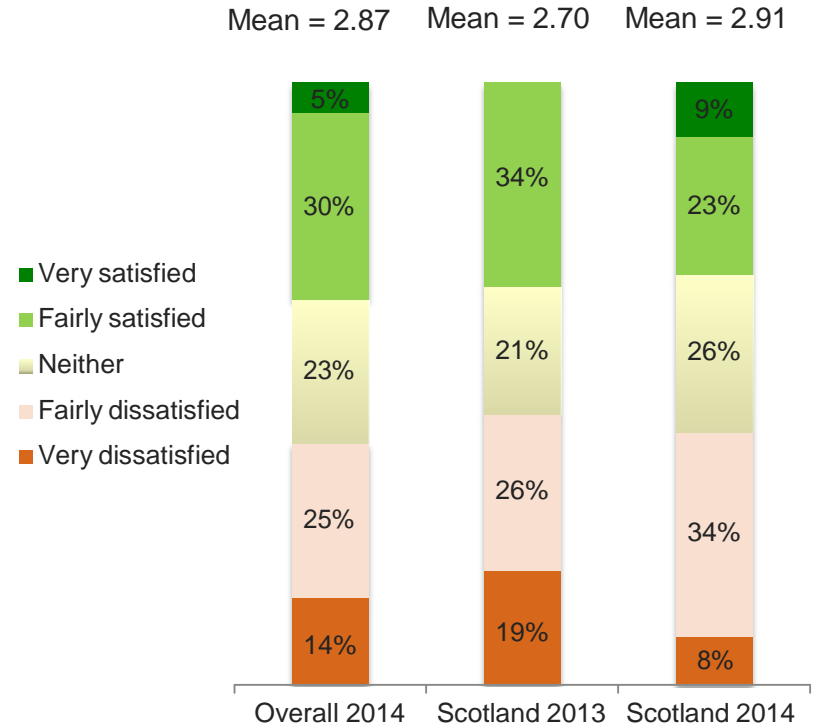
Overall train service performance

Train service performance has dropped significantly since its peak in 2012

Satisfaction with train service performance:
year on year
% satisfied



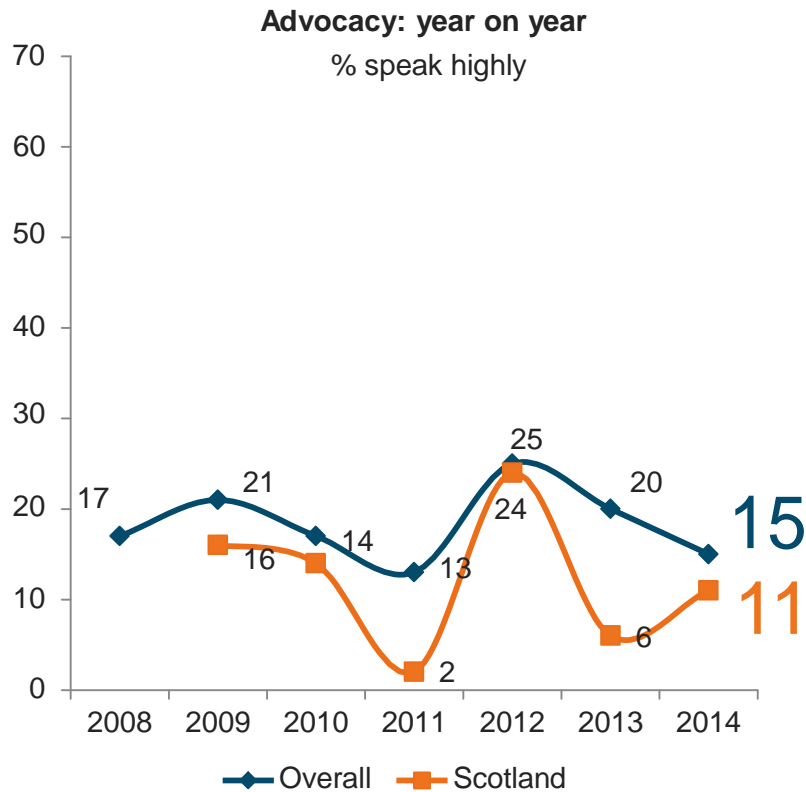
Scotland train service performance - response breakdown
compared with previous year



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

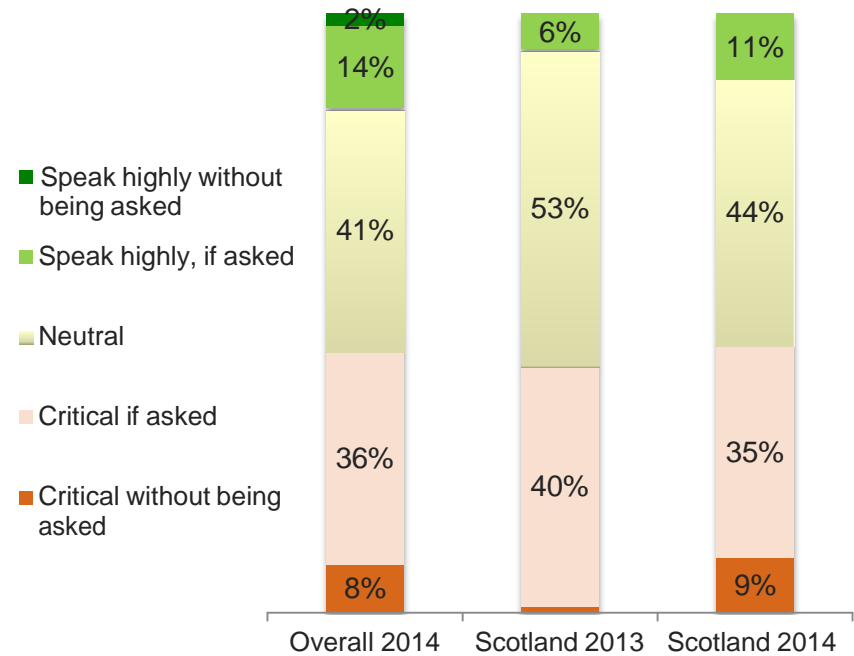
Advocacy: Whether customers would speak highly or critically of Network Rail

A slightly higher proportion of customers would speak highly of Network Rail this year compared to 2013, however, this is still low and behind the overall average



Scotland advocacy - response breakdown compared with previous year

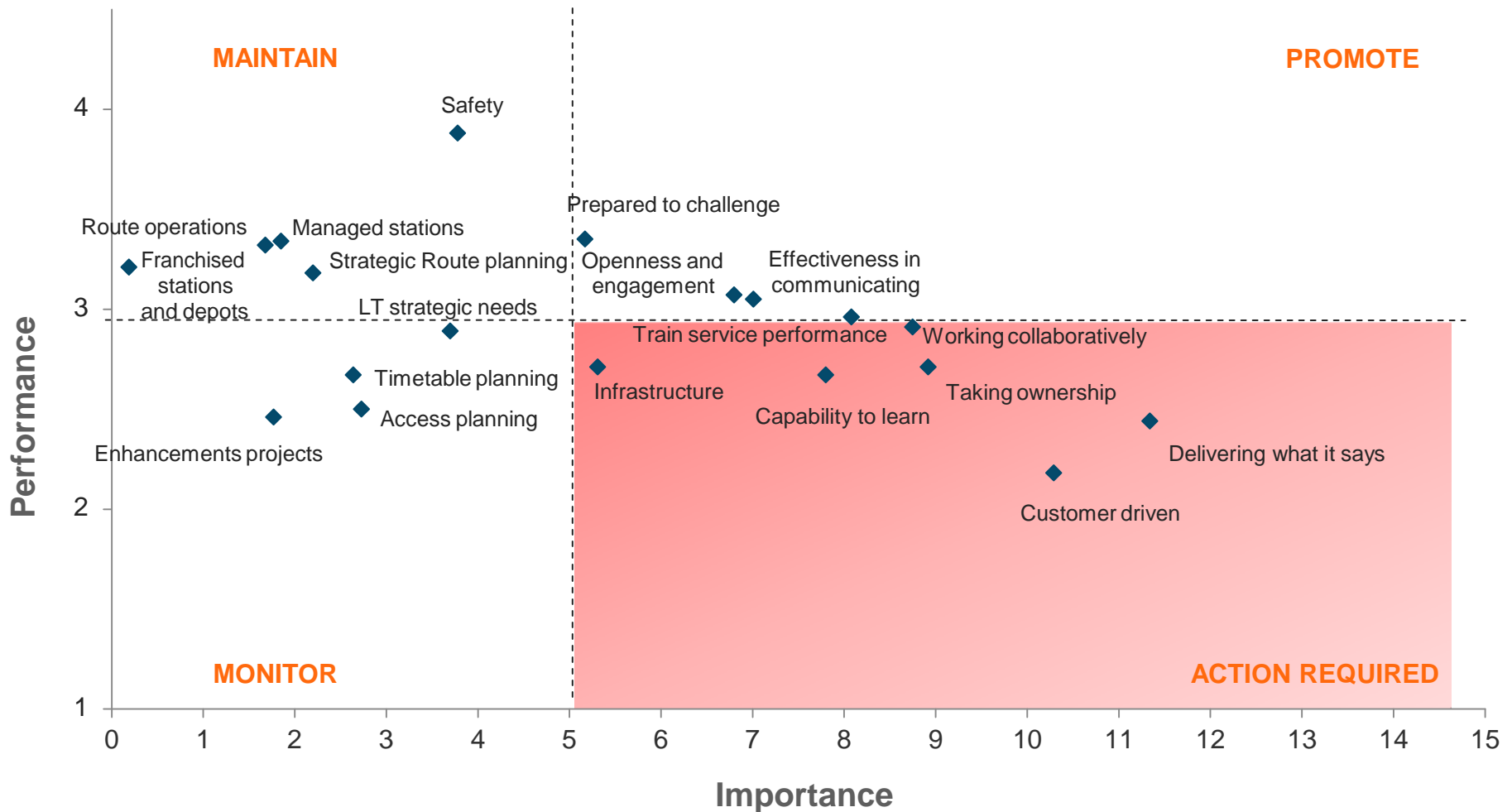
Mean = -0.35 Mean = -0.35 Mean = -0.43



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

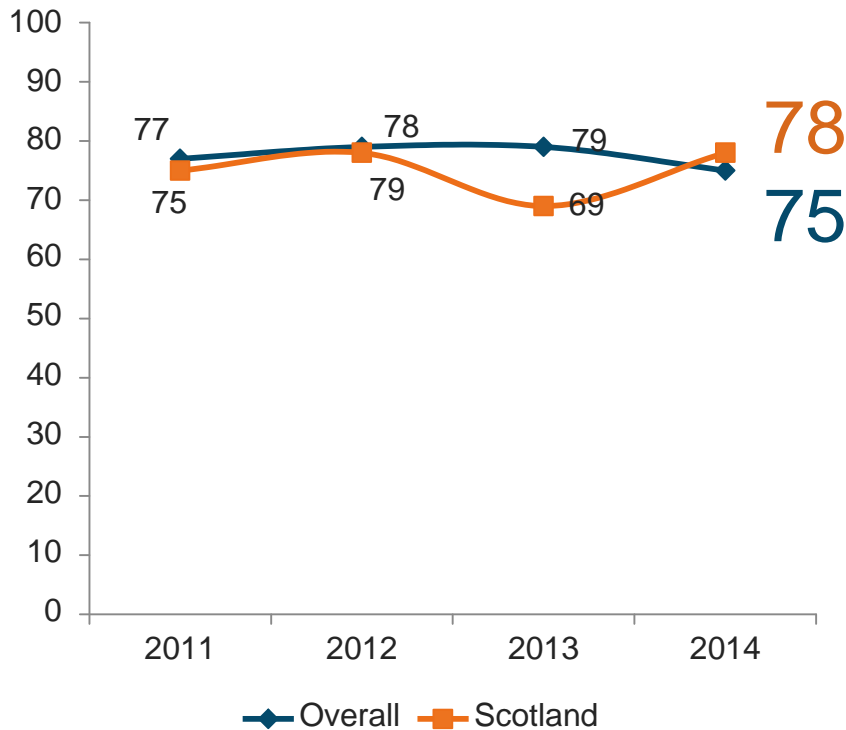
Drivers of satisfaction against route performance: Scotland



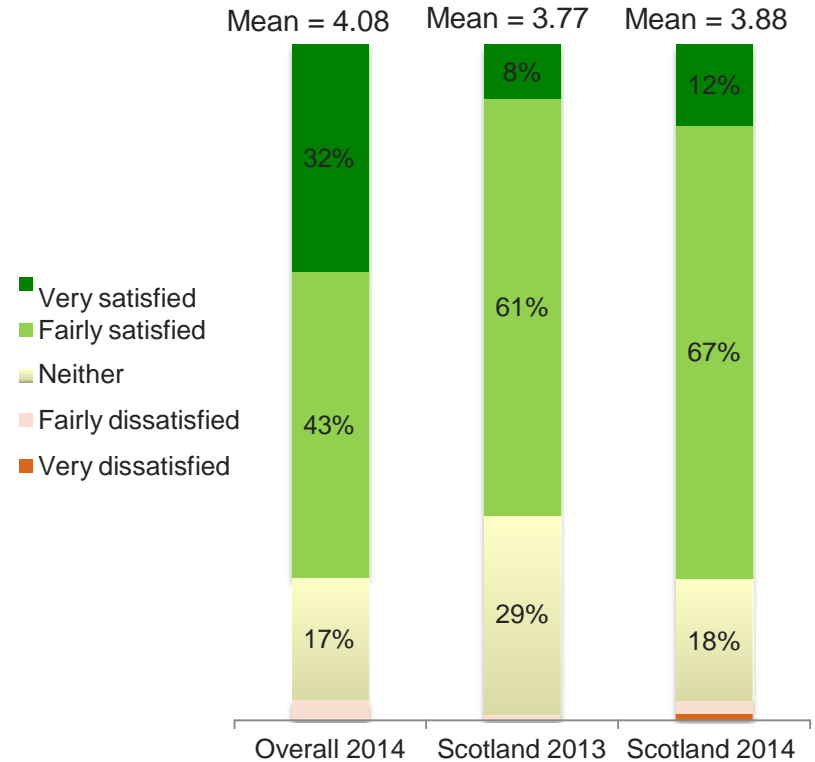
Satisfaction with safety

Safety is a strong performing attribute, improving 9% points since last year and slightly above the national average

Satisfaction with safety:
year on year
% satisfied

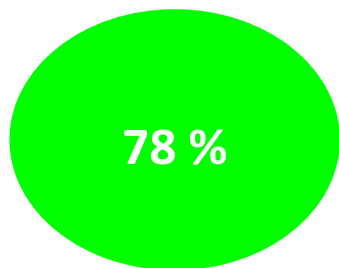


Scotland satisfaction with safety - response breakdown compared with previous year



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

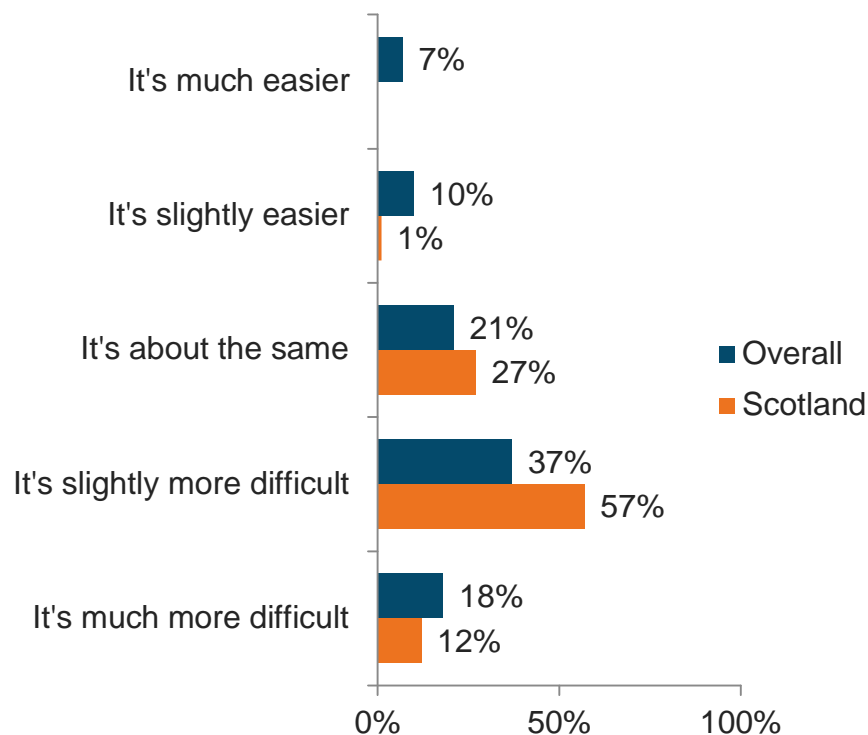
Reasons for satisfaction with safety



of Scotland customers claim to be satisfied.
with safety. The key reasons are **commitment to safety,**
safety is a priority

Working with Network Rail compared to other organisations

The majority of customers find working with Network Rail slightly more difficult compared to other organisations



















































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 +/-
			2014	+/-	2014	+/-	2014	+/-	2014	4 +/-
	Overall Route Score	Total	2.80	0.03	3.23	-0.01	2.91	0.21	-0.43	-0.08
TOC	CrossCountry	3%	2.75	-1.08	3.50	-0.70	3.00	0.17	-0.50	-1.00
	East Coast	4%	3.25	-0.25	4.50	0.50	4.25	2.25	-0.25	-0.75
	First ScotRail	79%	2.73	0.17	3.09	0.09	2.82	0.15	-0.45	-0.01
	Transpennine Express	2%	2.67	-0.33	3.09	-1.24	2.20	0.20	-0.67	0.00
	Virgin Trains	5%	2.00	-2.00	4.75	0.35	1.50	-0.90	-1.25	-1.45
FOC	Colas	<1%	4.00	0.00	4.50	0.50	3.50	-0.50	0.50	-0.50
	DB Schenker	3%	3.25	-0.75	4.22	0.05	3.75	0.42	-0.19	-0.02
	DirectRail Services	1%	3.00	-1.00	3.56	0.56	3.10	-0.15	-0.40	-0.65
	Freightliner Ltd	<1%	2.50	0.50	3.40	-0.60	2.75	0.25	-1.13	-0.13
	Freightliner Heavy Haul	1%	2.80	0.80	4.00	-0.50	3.75	0.25	0.20	1.20
	GB Railfreight	<1%	4.00	0.00	3.50	0.00	3.56	0.00	0.33	0.00
	DCR	<1%	4.00	0.00	4.00	0.00	4.00	0.00	0.50	0.00

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...?