



Network Rail 2014 Customer Survey Report

Route Report: South East

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)
- 98 customers chose to answer about the South East.

Route Summary

Summary

Key Findings

- Apart from train service performance, the South East scores above the national average on key metrics (overall, route satisfaction and advocacy)
- Most customer service attributes are above average, particularly openness/engagement and applying lessons learnt
- Access and Timetable planning are the lowest scoring activity areas and notably lower than the national average.

Action Areas

1. Delivering on promises and being more customer driven are key action areas impacting on satisfaction, whilst train performance remains an important action area.
2. Openness and engagement and working collaboratively show promising levels of satisfaction and Network Rail should look to further promote these attributes.
3. Improve performance with respect to infrastructure maintenance/renewals, timetable and access planning.

46% Overall Satisfaction

Overall satisfaction scores relatively well compared to other routes, however this has declined 13% points since 2013

47% Route Satisfaction

Route satisfaction is above the national average, but has declined 26% points since last year

18% Train Service Performance

Train service performance on South East has remained a very low scoring area

17% Advocacy

Advocacy is on par with the overall average, but has decreased by 4% points

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

Route compared with overall findings

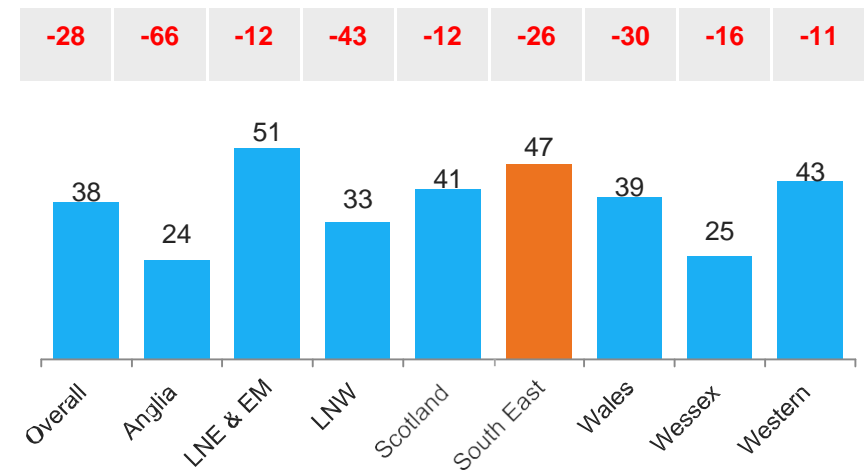
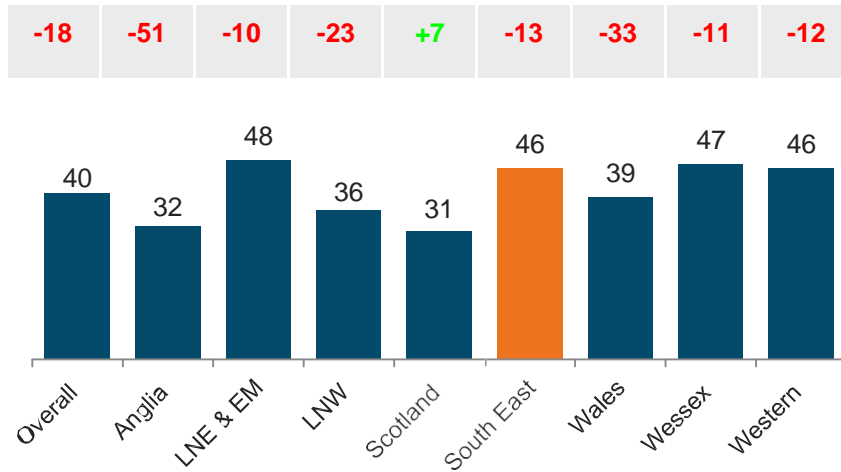
Key scores

Overall and route level satisfaction on South East route has declined since 2013, but remain above the national average

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

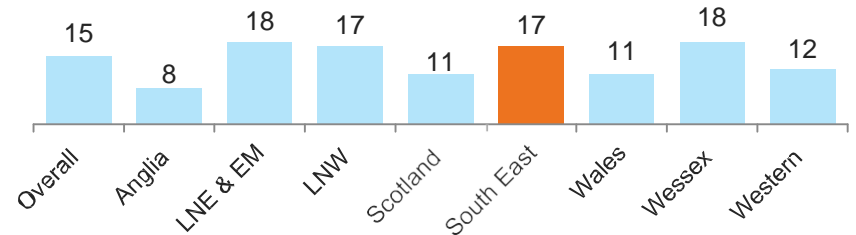
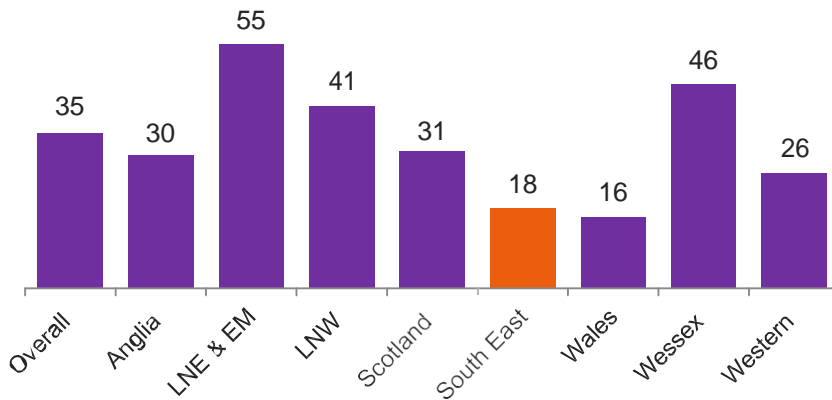
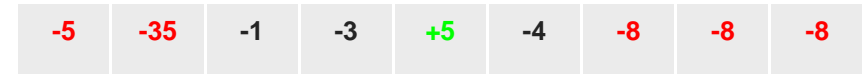
Key scores

Satisfaction with train performance varies notably, suggesting there is an inconsistent customer service delivery across the routes. The proportion of customers that would speak highly of Network Rail on the South East route is low but is in line with the national 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

Most customer service attributes are above average on the South East route, particularly openness/engagement and applying lessons learnt

Overall versus Route: % satisfied

| | Overall | SE | Gap* |
|------------------------------------|---------|----|------|
| Works collaboratively | 56 | 66 | +10 |
| Prepared to challenge | 53 | 57 | +4 |
| Openness and engagement | 50 | 69 | +19 |
| Effective communication | 46 | 53 | +7 |
| Focus on long term strategic needs | 46 | 42 | -4 |
| Takes ownership | 42 | 41 | -1 |
| Learns and applies lessons learnt | 26 | 37 | +11 |
| Customer driven | 23 | 25 | +2 |
| Delivers what it says | 22 | 30 | +8 |

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 South East route is relatively high for Managed stations and Franchised stations and depots, Infrastructure maintenance/renewals, Timetable, Access and Strategic route planning are below average

Overall versus Route: % satisfied

| | Overall | SE | Gap* |
|---|---------|----|------|
| Route operations | 40 | 48 | +8 |
| Strategic Route planning | 32 | 27 | -5 |
| Managed stations | 29 | 47 | +18 |
| Franchised stations and depots | 28 | 41 | +13 |
| Delivery of enhancements projects | 28 | 34 | +6 |
| Timetable planning | 26 | 18 | -8 |
| Infrastructure maintenance and renewals | 25 | 16 | -9 |
| Access planning | 18 | 13 | -5 |

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

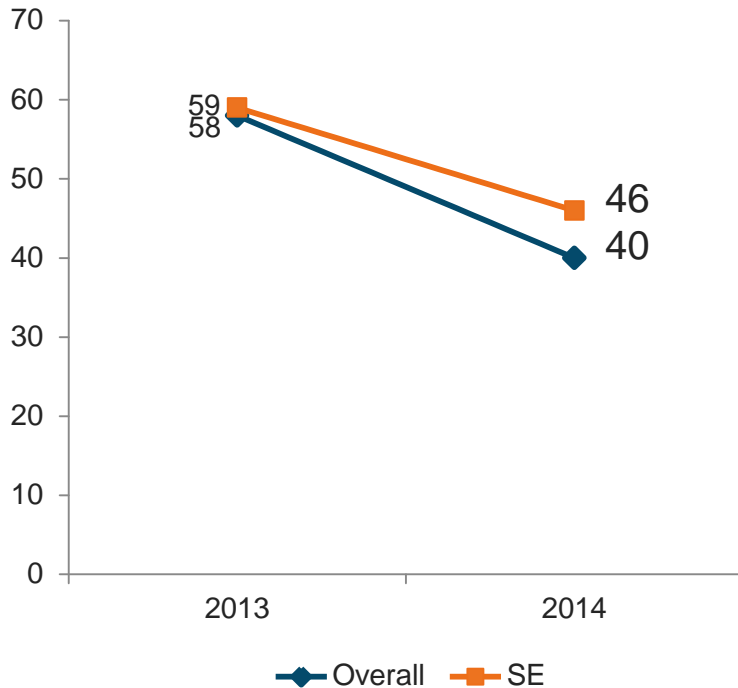
* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

Route key scores

Overall satisfaction

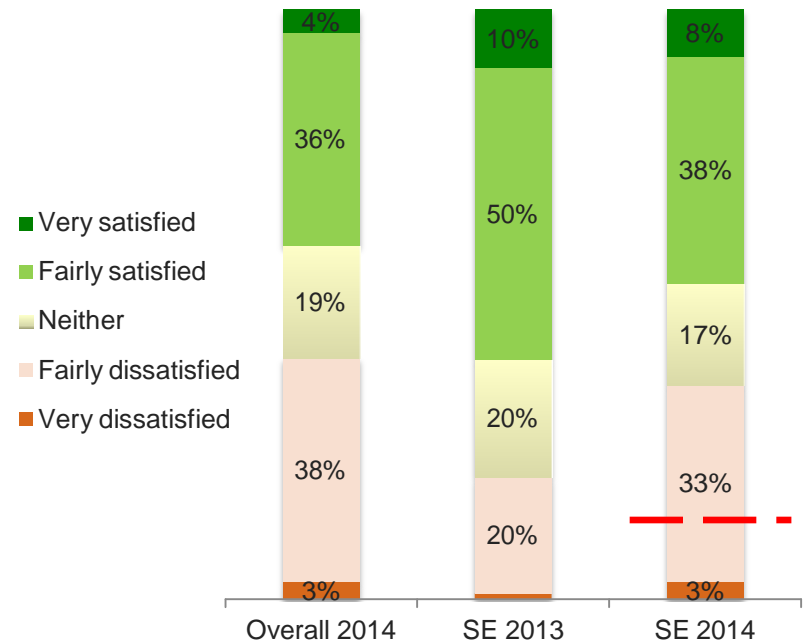
Overall satisfaction with Network Rail has declined 13% points since 2013, however the score is marginally above the national average

Overall satisfaction: year on year
% satisfied



SE overall satisfaction:
response breakdown
compared with previous year

Mean = 3.00 Mean = 3.47 Mean = 3.14



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



46 %

of SE customers claim to be satisfied.

The key reasons are **Customer and management teams at Network Rail**



37 %

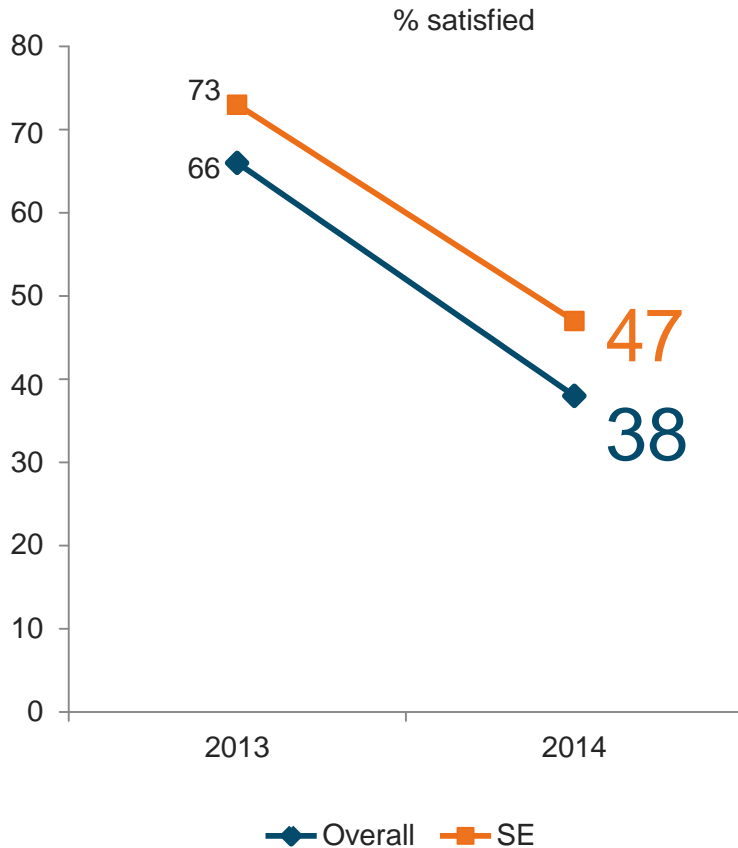
of SE customers claim to be dissatisfied.

The key reasons being **General performance and working relationships**

Route satisfaction

Satisfaction on South East route has decreased 26% points since 2013 to 47%, a decline which is in line with the national average

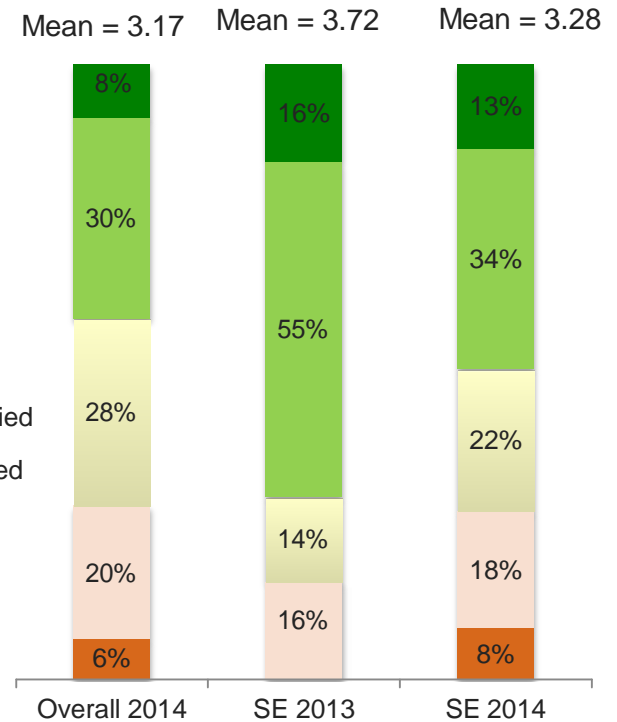
Route satisfaction: year on year



SE overall satisfaction:

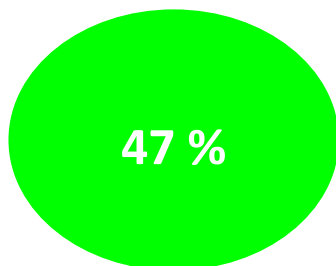
response breakdown

compared with previous year

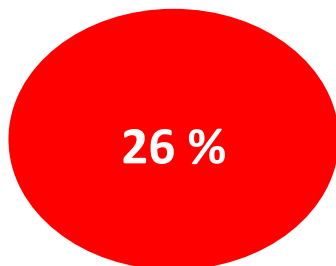


Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

Reasons for route satisfaction/dissatisfaction



of South East customers claim to be satisfied.
The key reason being **Working relationships**



of South East customers claim to be dissatisfied.
The key reason being **Performance**

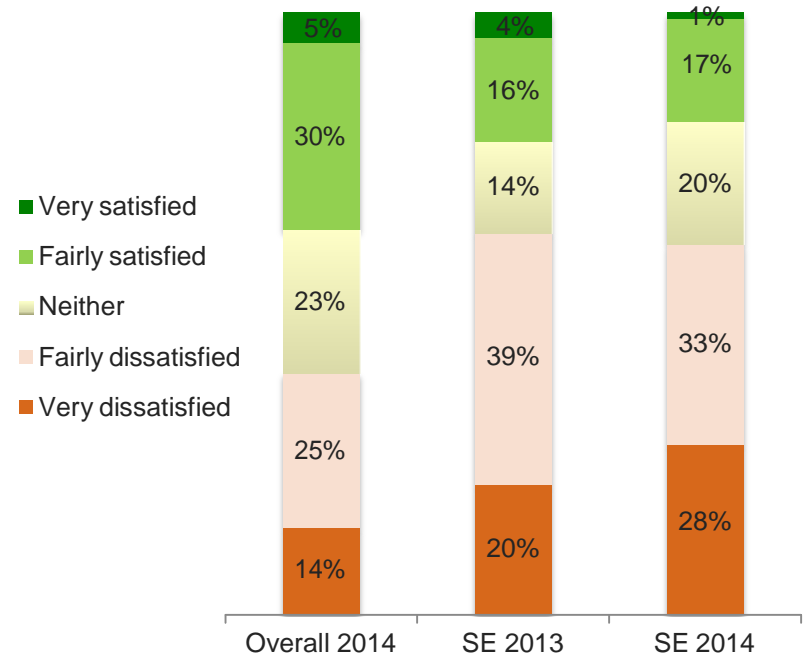
Overall train service performance

Train service performance is broadly in line with 2013, however, notably lower than the overall average

SE train service performance - response breakdown compared with previous year



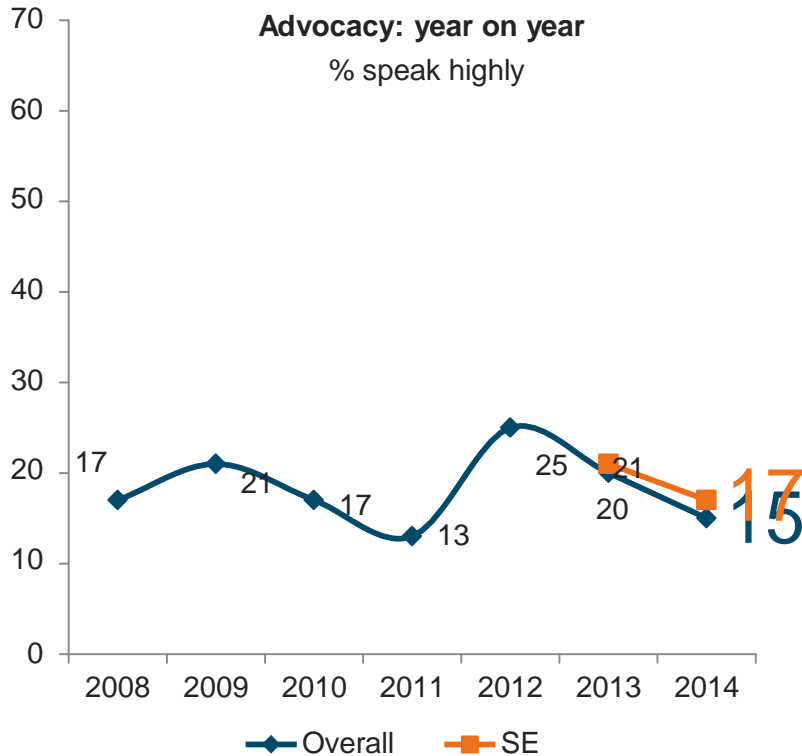
Mean = 2.87 Mean = 2.41 Mean = 2.30



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

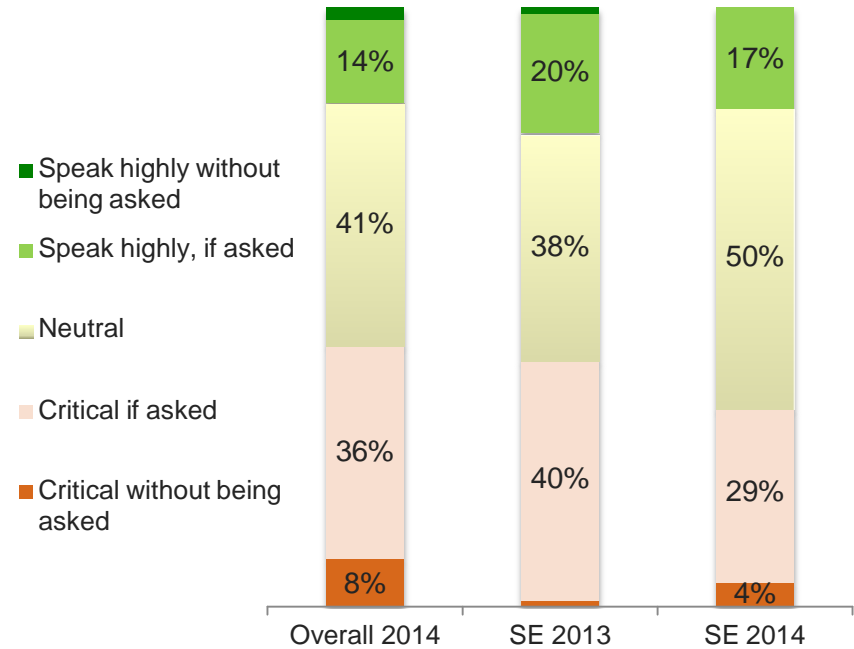
Advocacy: Whether customers would speak highly or critically of Network Rail

A slightly lower proportion of customers would speak highly of Network Rail this year compared to 2013, which is broadly in line with the overall average



SE advocacy - response breakdown compared with previous year

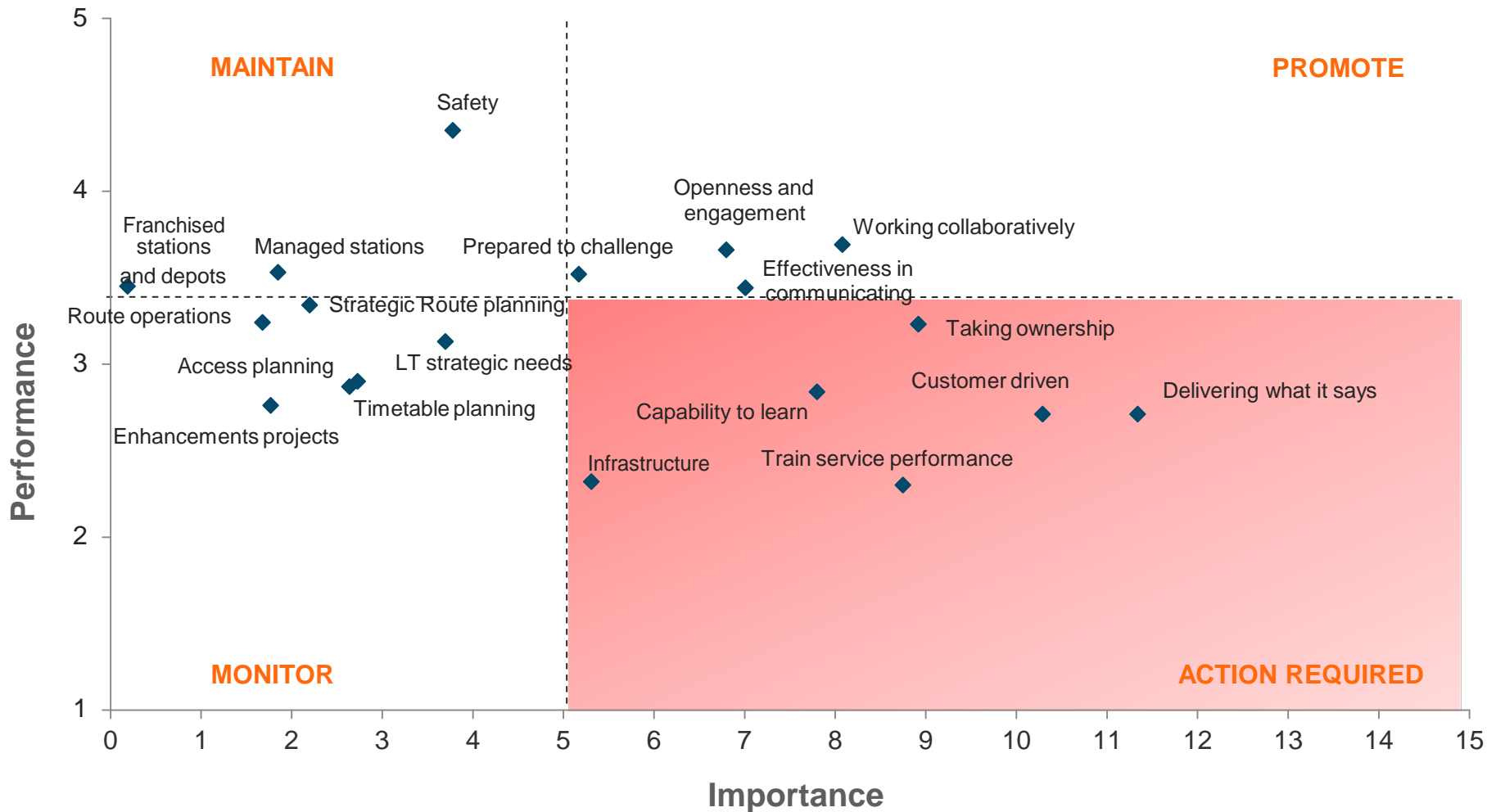
Mean = -0.35 Mean = 0.21 Mean = -0.19



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

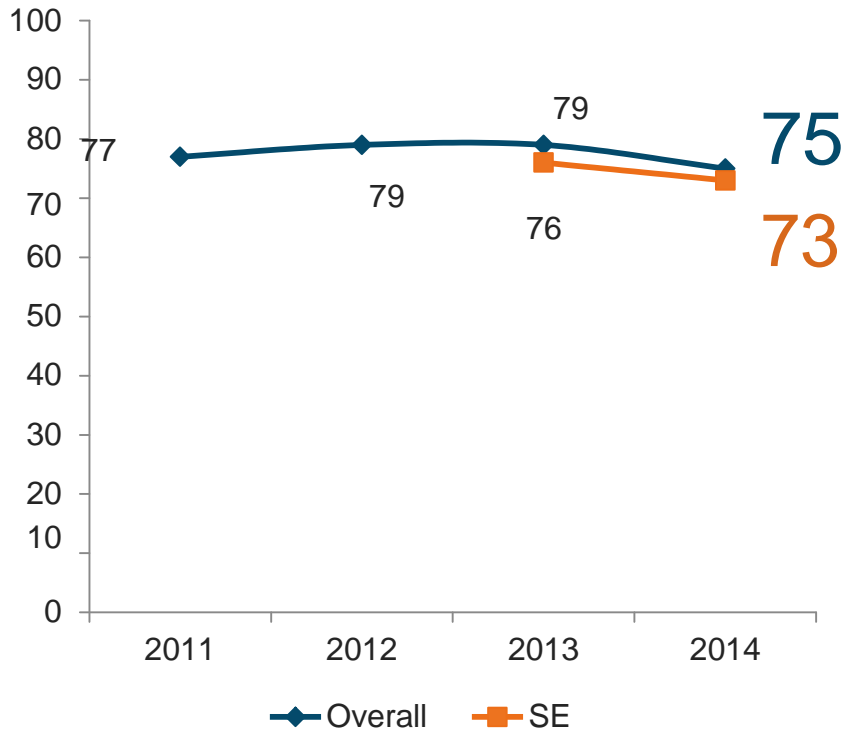
Drivers of satisfaction against route performance: South East



Satisfaction with safety

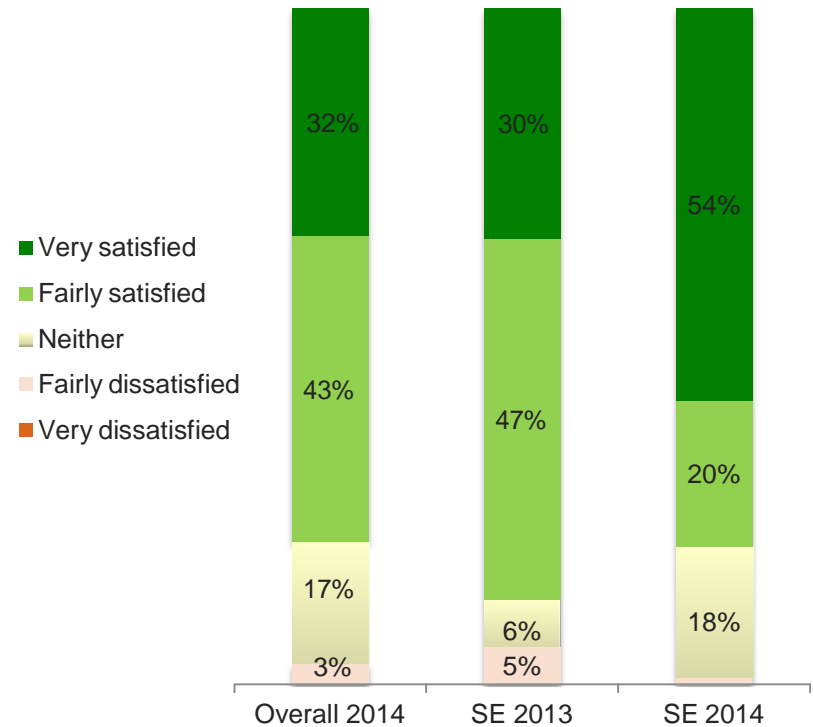
Safety is a strong performing attribute, and in line with the national average

Satisfaction with safety:
year on year
% satisfied



SE satisfaction with safety - response breakdown compared with previous year

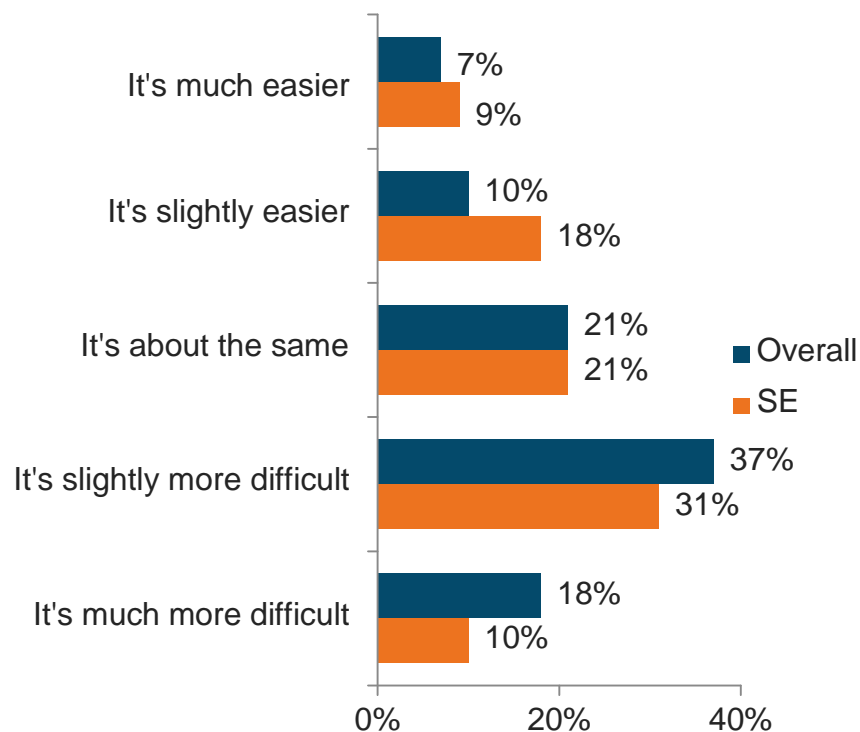
Mean = 4.08 Mean = 4.14 Mean = 4.35



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

Working with Network Rail compared to other organisations

Customers on the South East Route were more positive than customers overall, but still only around a quarter felt it was easier to work with Network Rail



















































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 | 3.14 | 🟡 -0.33 | 3.28 | N/A | 2.30 | 🟡 -0.11 |
| TOC | Eurostar Intl | 49% | 3.83 | 🟡 -0.17 | 4.17 | 🟡 -0.33 | 4.33 | 🟡 0.08 | 0.83 | 🟡 0.33 |
| | GTR | 19% | 3.00 | 🟢 0.83 | 3.17 | 🔴 -0.66 | 3.17 | 🟢 1.84 | 0.17 | 🟢 1.00 |
| | First Great Western | 1% | 5.00 | 🟢 0.67 | 5.00 | 🟢 1.33 | 4.00 | 🟢 1.33 | 2 | 🟢 2.33 |
| | London Overground | 30% | 3.14 | 🟡 0.39 | 2.86 | 🟡 -0.14 | 2.83 | 🟡 -0.42 | -0.14 | 🟡 -0.14 |
| | London Underground | <0.5% | 3.50 | N/A | 3.00 | N/A | 3.00 | N/A | 0 | N/A |
| | Southeastern | 100% | 3.14 | 🔴 -0.86 | 3.14 | 🔴 -1.14 | 2.00 | 🔴 -1.00 | -0.21 | 🟡 -0.43 |
| | Southern | 90% | 3.10 | 🟡 0.10 | 3.40 | 🟡 0.20 | 2.30 | 🟢 0.67 | -0.2 | 🟡 0.47 |
| FOC | Colas | <0.5% | 4.00 | 🟡 0.00 | 4.00 | 🟡 0.00 | 3.50 | 🟡 -0.50 | 0.50 | 🟡 -0.50 |
| | DB Schenker | 31% | 3.25 | 🔴 -0.75 | 3.43 | 🟡 -0.07 | 3.75 | 🟢 0.75 | -0.19 | 🟡 -0.19 |
| | DirectRail Services | 2% | 3.00 | N/A | 3.25 | N/A | 3.10 | N/A | -0.40 | N/A |
| | Freightliner Ltd | <0.5% | 2.50 | N/A | - | N/A | 2.75 | N/A | -1.13 | N/A |
| | Freightliner Heavy Haul | <0.5% | 2.80 | N/A | 3.00 | N/A | 3.75 | N/A | 0.20 | N/A |
| | GB Railfreight | 26% | 4.00 | N/A | 3.29 | N/A | 3.56 | N/A | 0.33 | N/A |
| | DCR | <0.5% | 4.00 | N/A | 4.00 | N/A | 4.00 | N/A | 0.50 | N/A |

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 Δ | 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...?