



Network Rail 2014 Customer Survey Report

Route Report: Wales

Prepared by: 

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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 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)
- 76 customers chose to answer about Wales.

Route Summary

Summary

Key Findings

- All key metrics (overall & route satisfaction, train performance and advocacy) have declined since last year, and are generally behind the national average.
- Most customer service attributes are below average, particularly openness and engagement, however, being prepared to challenge is a particularly strong area
- The delivery of enhancement projects, strategic route planning and managed stations are low scoring activity areas, and notably lower than the national average.

Action Areas

1. Delivering on promises, being more customer driven and taking ownership are key action areas impacting on satisfaction.
2. Strong focus is also needed on improving train service performance in conjunction with infrastructure renewals and maintenance
3. Safety is in decline and an area of concern

39% Overall Satisfaction

Overall satisfaction with Network Rail is in line with the national average, however, there has been a notable decline since 2013 (-33% points).

39% Route Satisfaction

Route satisfaction is on par with the overall average, but has declined significantly since 2013 (-30% points).

16% Train Service Performance

Train service performance on Wales is well below average and has declined 12% points since last year.

11% Advocacy

The proportion of customers speaking highly of Network Rail is also down on last year (-8% points)

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

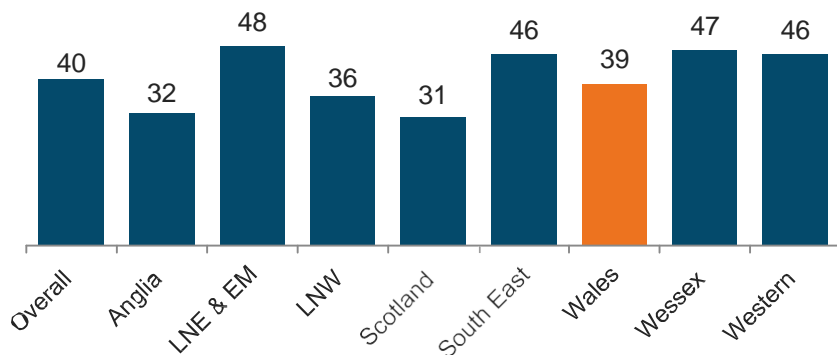
Route compared with overall findings

Key scores

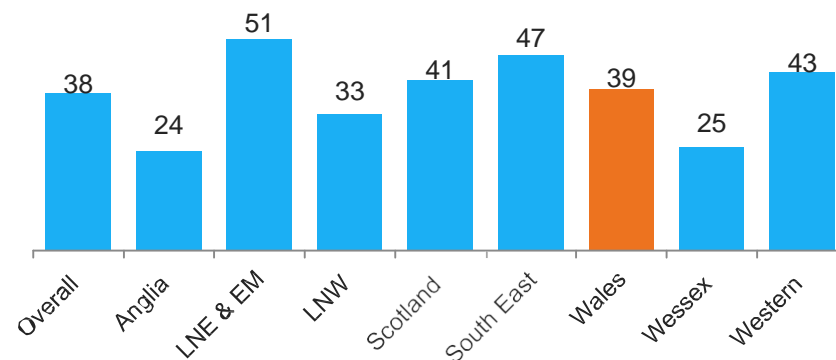
Overall satisfaction on the Wales route has decreased significantly (33% points) since 2013, and is broadly in line with the national average. Route level satisfaction has also declined since last year

% 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

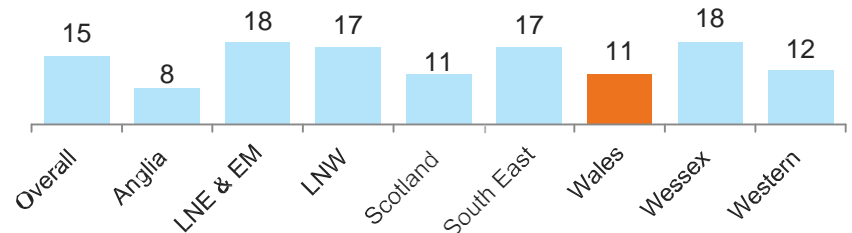
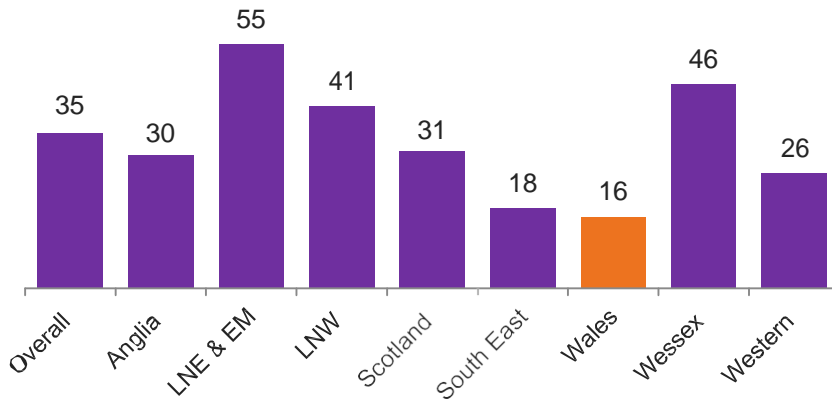
Key scores

Satisfaction with train performance varies notably across the routes, suggesting there is an inconsistent customer service delivery. Wales scores the least well of all the routes on train service performance, whilst the proportion of customers that would speak highly of Network Rail on Wales route is low at 11%

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

A number of customer service attributes are notably lower than average on the Wales route, particularly openness and engagement and delivering what it says, however, being prepared to challenge and focusing on long term strategic needs perform relatively well

Overall versus Route: % satisfied

	Overall	Wales	Gap*
Works collaboratively	56	46	-10
Prepared to challenge	53	80	+27
Openness and engagement	50	34	-16
Effective communication	46	47	+1
Focus on long term strategic needs	46	52	+6
Takes ownership	42	32	-10
Learns and applies lessons learnt	26	18	-8
Customer driven	23	21	-2
Delivers what it says	22	9	-13

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

Scores for Wales are low across the board for all activity areas with delivery of enhancement projects, strategic route planning, managed/franchised stations and route operations, all scoring below the national average and have declined significantly since 2013

Overall versus Route: % satisfied

	Overall	Wales	Gap*
Route operations	40	24	-16
Strategic Route planning	32	12	-20
Managed stations	29	10	-19
Franchised stations and depots	28	13	-15
Delivery of enhancements projects	28	8	-20
Timetable planning	26	24	-2
Infrastructure maintenance and renewals	25	26	+1
Access planning	18	17	-1

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

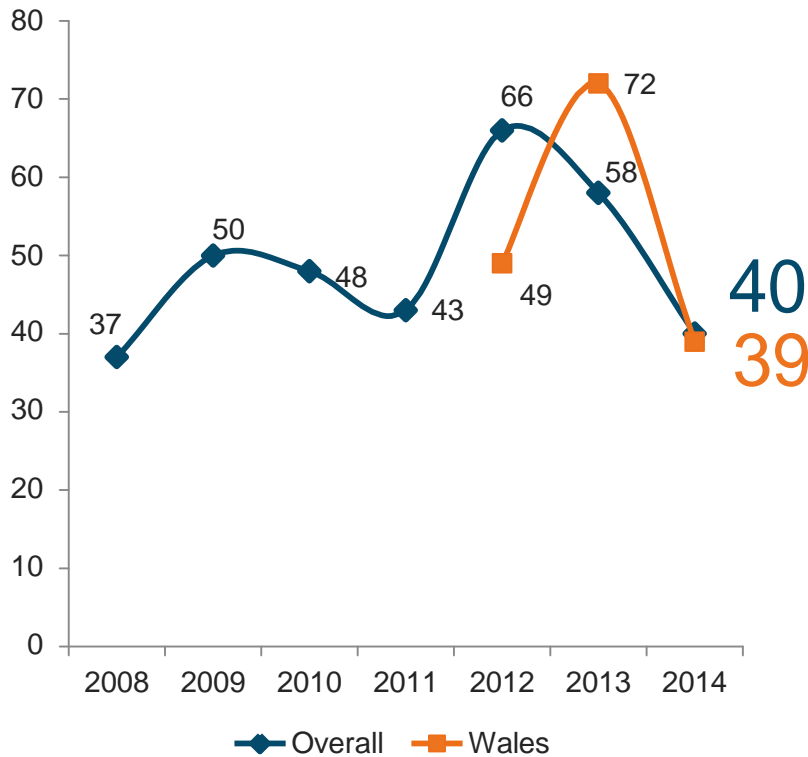
* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

Route key scores

Overall satisfaction

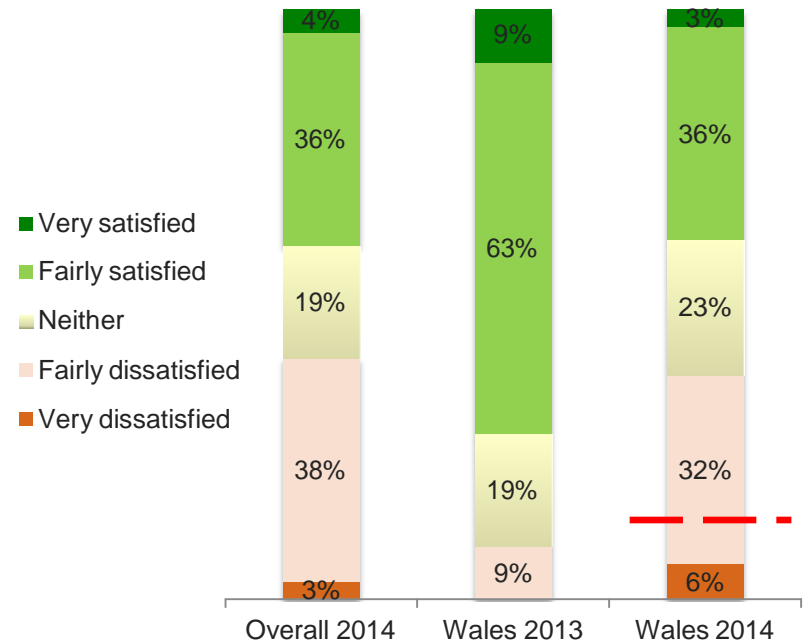
Overall satisfaction with Network Rail has dropped notably since 2013 (-33% points), with a greater proportion of customers fairly dissatisfied compared to last year

Overall satisfaction: year on year
% satisfied



Wales overall satisfaction: response breakdown compared with previous year

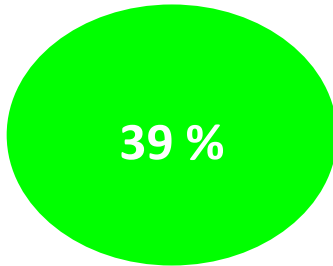
Mean = 3.00 Mean = 3.72 Mean = 2.98



NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL

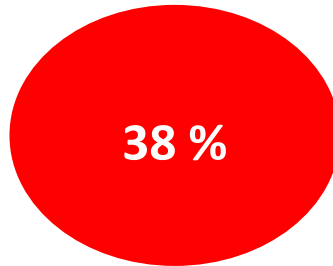
Q1. Taking into account all of your experiences with Network Rail during the last 12 months as a whole, how satisfied or dissatisfied are you with Network Rail?

Reasons for overall satisfaction/dissatisfaction



of Wales customers claim to be satisfied.

The key reasons are **good working relationships,**
customer engagement



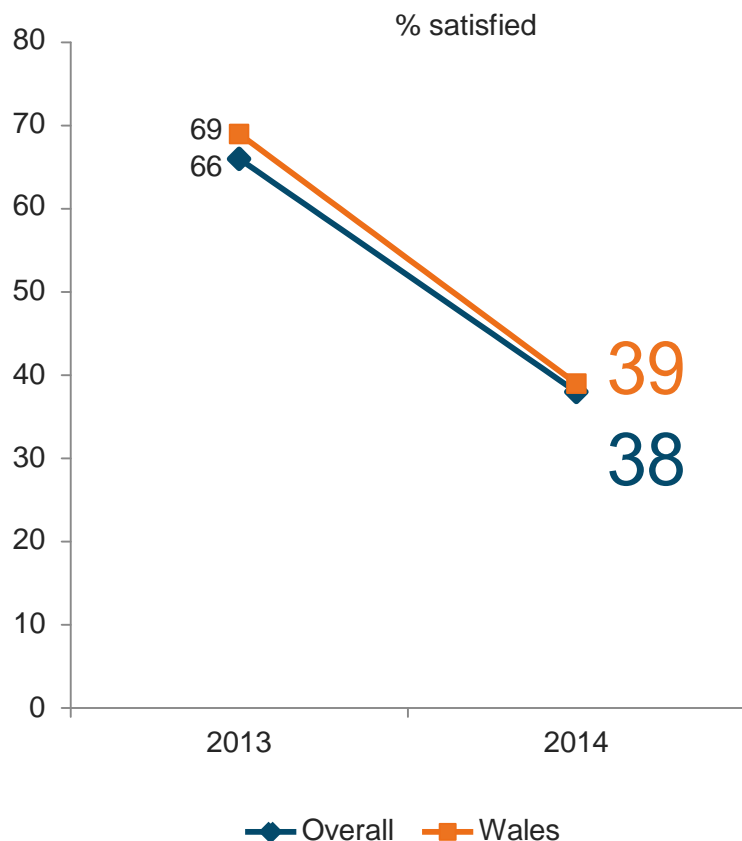
of Wales customers claim to be dissatisfied.

The key reason being **delivering on promises**

Route satisfaction

Satisfaction on Wales route has decreased 30% points since 2013 to 39%, which is in line with the national average. Around a quarter of customers are dissatisfied

Route satisfaction: year on year

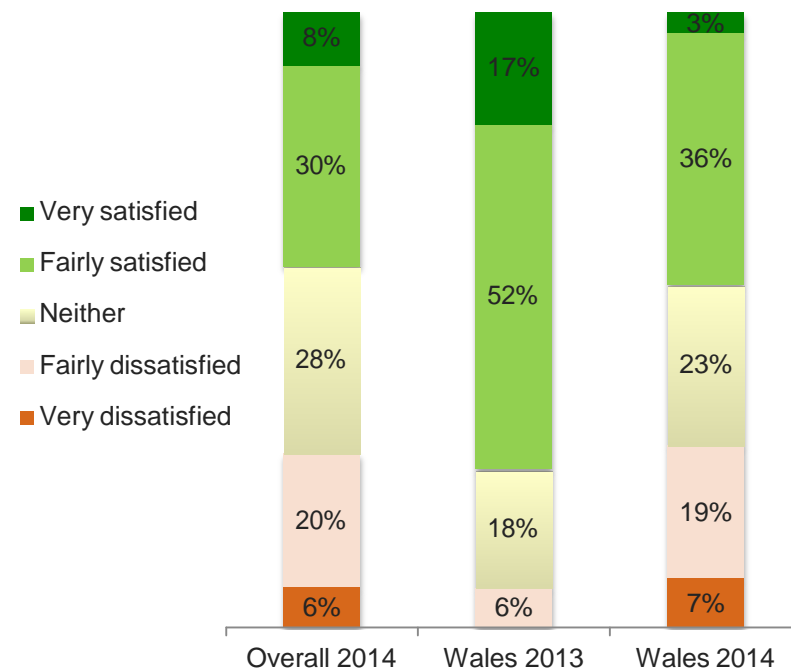


Wales overall satisfaction:

response breakdown

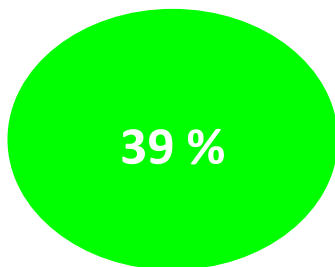
compared with previous year

Mean = 3.17 Mean = 3.86 Mean = 3.11



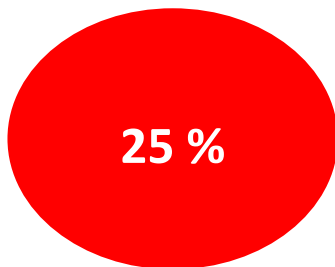
Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

Reasons for route satisfaction/dissatisfaction



of Wales customers claim to be satisfied.

The key reasons are **positive working relationships, communication**



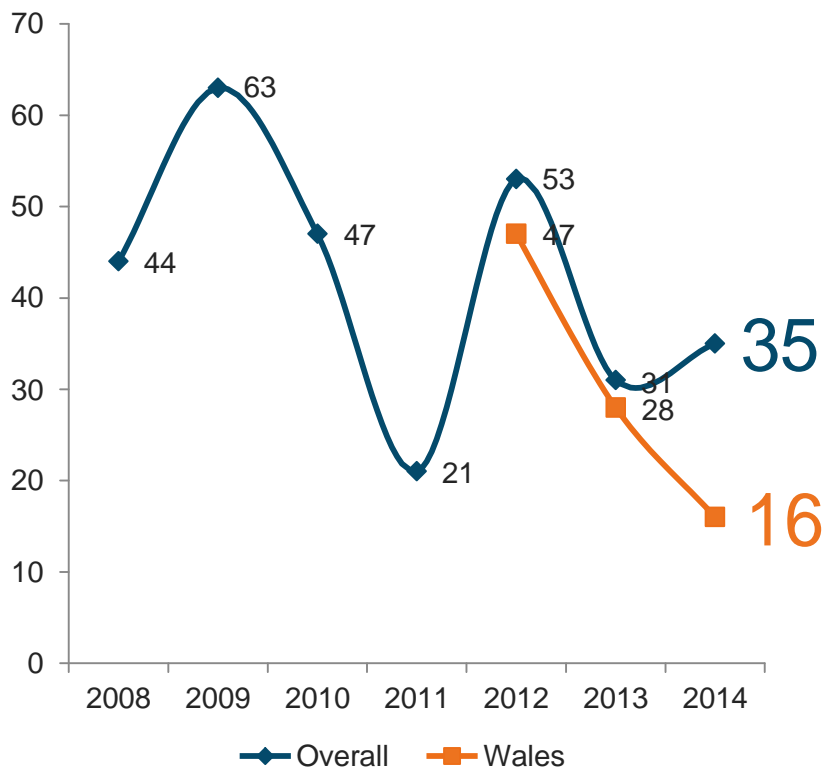
of Wales customers claim to be dissatisfied.

The key reasons are **customer focus, train performance**

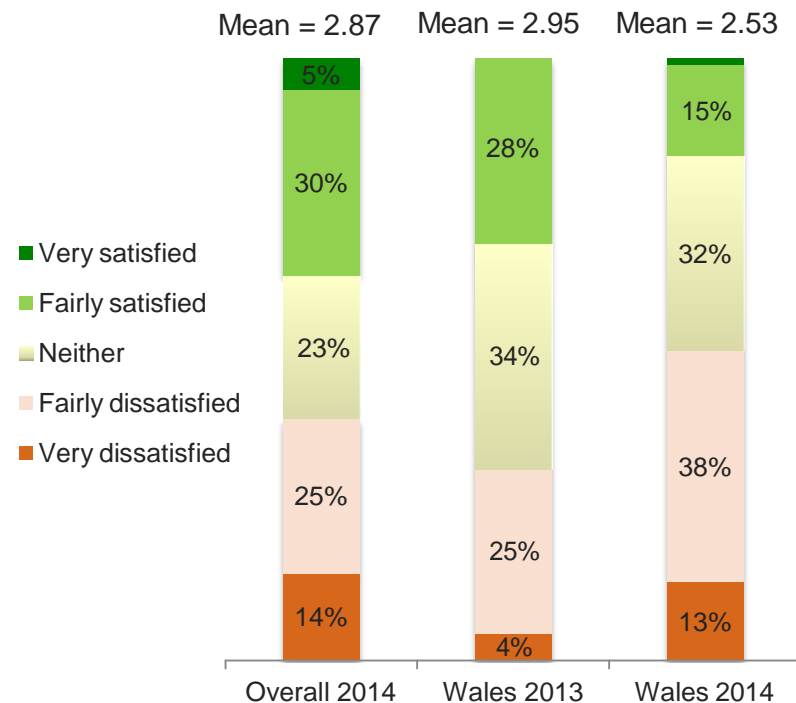
Overall train service performance

Train service performance has dropped significantly since its peak in 2012

Satisfaction with train service performance:
year on year
% satisfied



Wales train service performance - response breakdown
compared with previous year

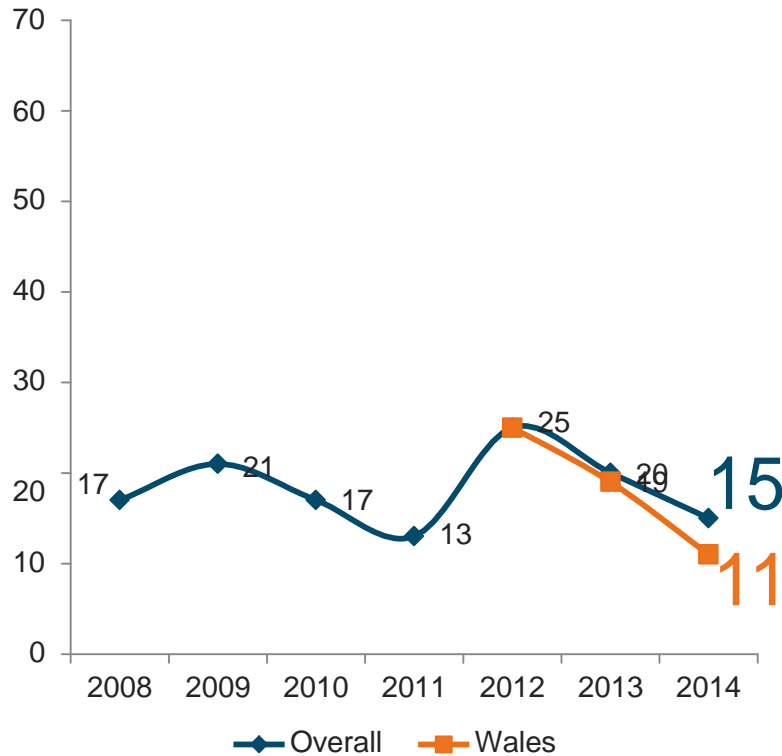


Q4c. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail's part in overall train service performance

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

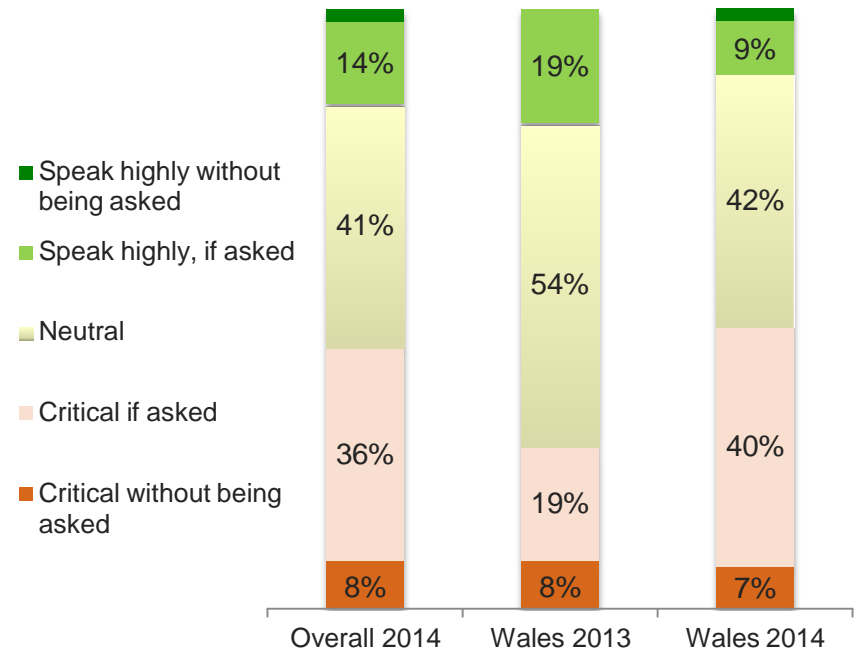
The majority of customers would speak critically of Network Rail on the Wales route, however this is broadly in line with the national average

Advocacy: year on year
% speak highly



Wales advocacy - response breakdown
compared with previous year

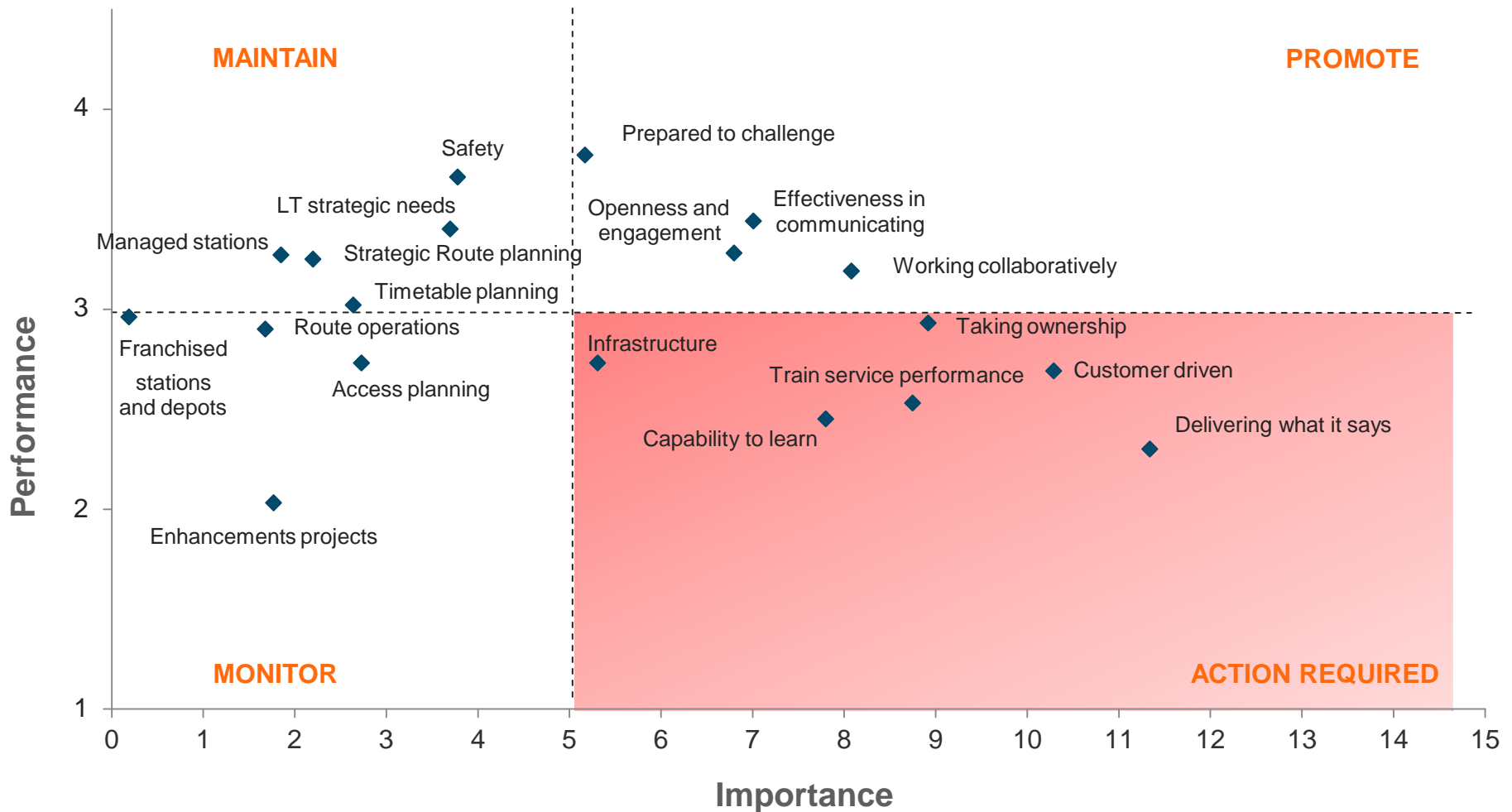
Mean = -0.35 Mean = -0.16 Mean = -0.41



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

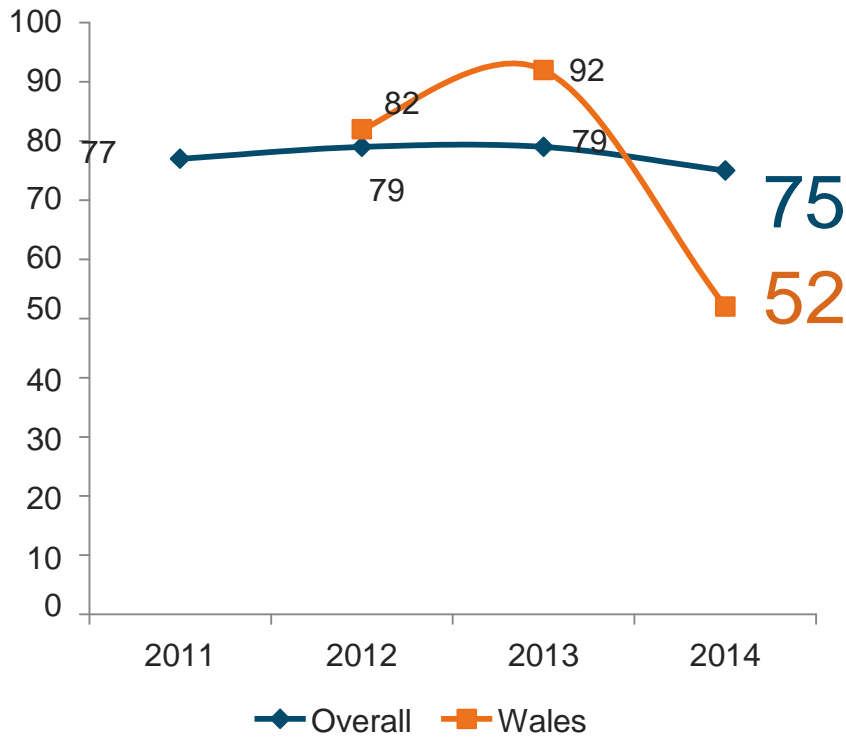
Drivers of satisfaction against route performance: Wales



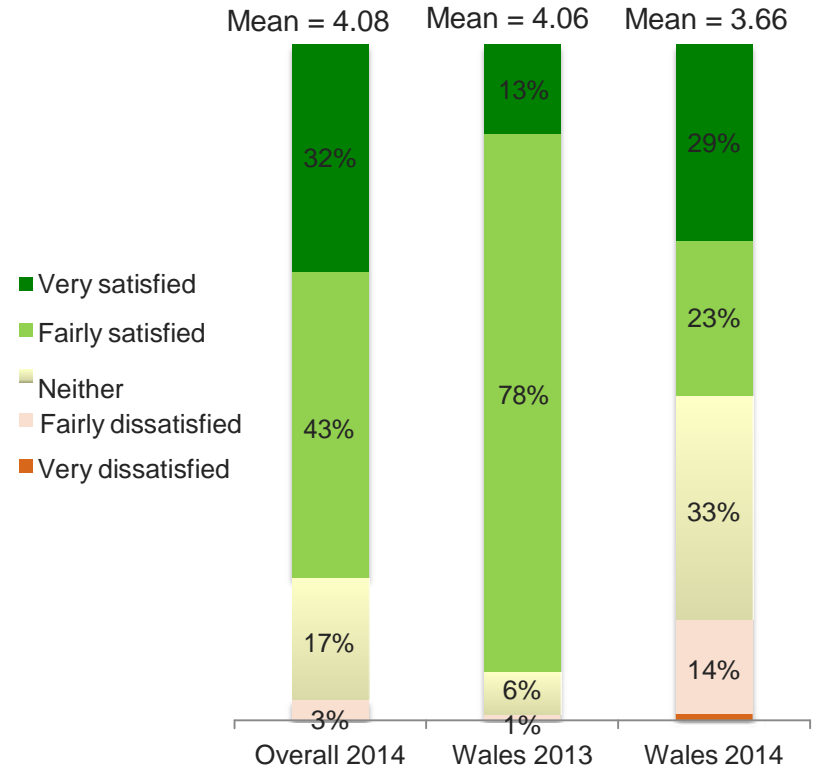
Satisfaction with safety

Safety has declined notably since 2013, with a large proportion of customers feeling neither satisfied or dissatisfied this year

Satisfaction with safety:
year on year
% satisfied

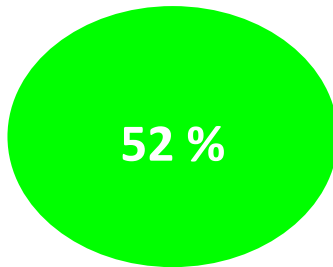


Wales satisfaction with safety - response breakdown compared with previous year



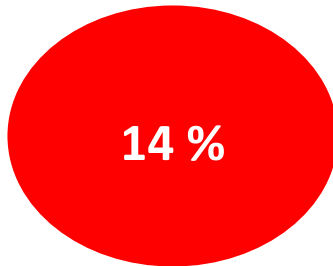
Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

Reasons for satisfaction/dissatisfaction with safety



of Wales customers claim to be satisfied with safety.

The key reasons are **commitment to safety, safety is a priority**

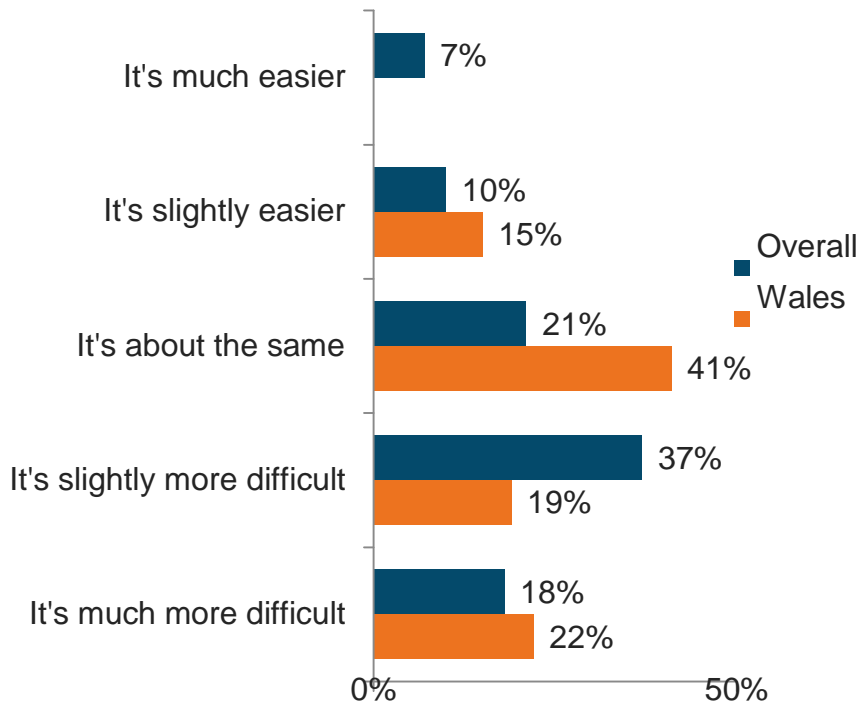


of Wales customers claim to be dissatisfied with safety.

The key reasons are **recent incidents and management of level**

Working with Network Rail compared to other organisations

The majority of customers find working with Network Rail 'about the same' when 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	
	Score	Change	Score	Change	Score	Change	Score	Change
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	
			2013/2014	2013/2014	2013/2014	2013/2014	2013/2014	2013/2014		
			2014	14	2014	14	2014	14	2014	14
	Overall Route Score	Total	2.98	-0.74	3.11	-0.75	2.53	-0.42	-0.41	-0.25
TOC	Arriva Trains Wales	73%	2.83	-0.88	2.91	-1.01	2.33	-0.75	-0.50	-0.43
	CrossCountry	3%	3.00	-0.57	3.60	-0.23	3.00	0.29	-0.60	-0.89
	First Great Western	12%	3.60	-0.40	4.25	1.00	2.80	1.13	0.00	0.75
	Virgin Trains	2%	2.00	-2.00	4.50	0.50	1.00	-1.00	-1.50	-1.50
FOC	Colas	<1%	4.00	0.67	5.00	0.67	3.50	-0.17	0.50	0.50
	DB Schenker	7%	3.25	-0.75	3.45	-0.80	3.75	0.25	-0.19	0.31
	DirectRail Services	<1%	3.00	-1.50	3.50	-1.50	3.10	-0.90	-0.40	-0.90
	Freightliner Ltd	<1%	2.50	0.50	2.33	-0.67	2.75	-0.25	-1.13	-0.13
	Freightliner Heavy Haul	1%	2.80	0.80	2.75	-1.25	3.75	-0.25	0.20	1.20
	GB Railfreight	<1%	4.00	N/A	3.17	N/A	3.56	N/A	0.33	N/A
	DCR	<1%	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	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...?