



Network Rail 2014 Customer Survey Report

Route Report: Wessex

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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)
- 68 customers chose to answer about Wessex.

Route Summary

Summary

Key Findings

- Most key metrics (overall and route satisfaction and advocacy) have declined since last year, however, train service performance has improved.
- Whilst most customer service attributes are above average, there have been some notable declines in taking ownership, focusing on long term strategic needs and working collaboratively.
- All activity areas are below the national average, particularly route operations and franchised stations and depots.

Action Areas

1. Taking ownership, delivering on promises and being more customer driven are key action areas impacting on satisfaction.
2. Safety is in decline and should be an area of focus.
3. Train service performance should still continually be improved in conjunction with much needed advancements in infrastructure maintenance and renewals provision.

47% Overall Satisfaction

Overall satisfaction with Network Rail is above the national average, however, there has been a notable decline since 2013 (-11% points).

25% Route Satisfaction

Route satisfaction is very low and below the overall average. This has also declined since 2013 (-16% points).

46% Train Service Performance

Train service performance on Wessex route is above average and has increased 18% points since last year.

18% Advocacy

The proportion of customers speaking highly of Network Rail is low, but above the national average (down 8% points since 2013)

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

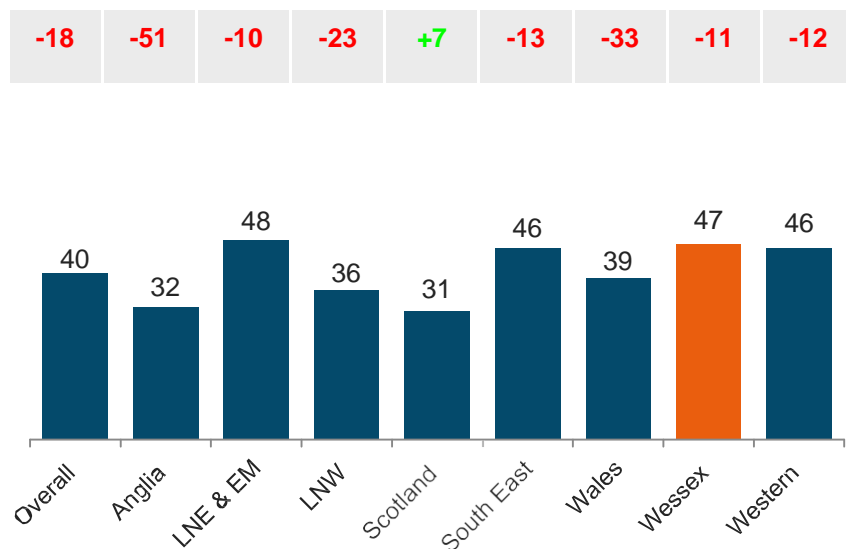
Route compared with overall findings

Key scores

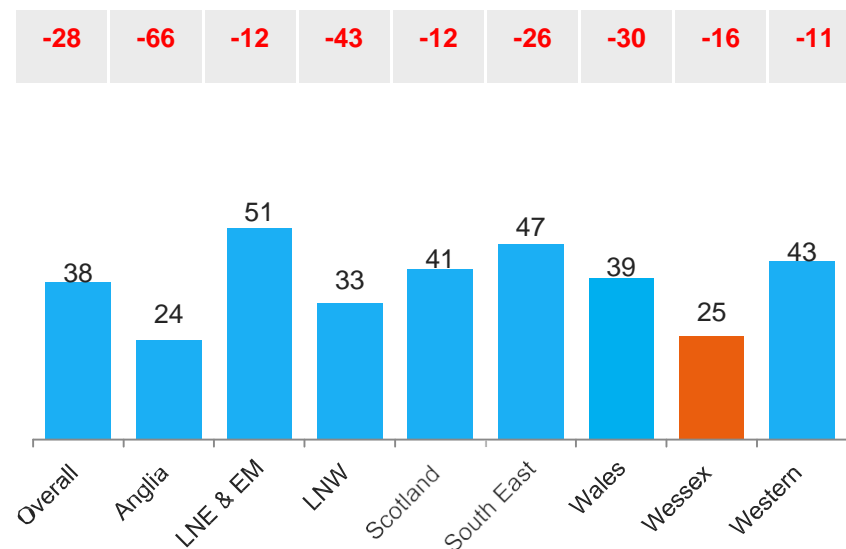
Overall satisfaction on Wessex route has decreased notably (11% points) since 2013, but remains above the national average. Route level satisfaction is very low and has declined since last year

% 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

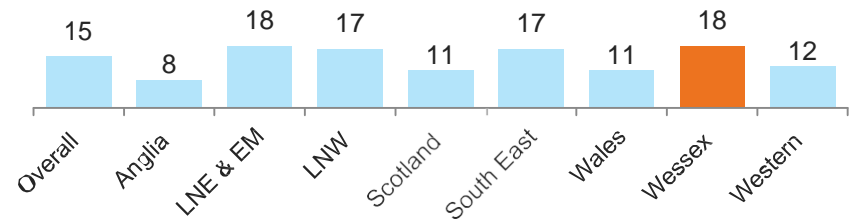
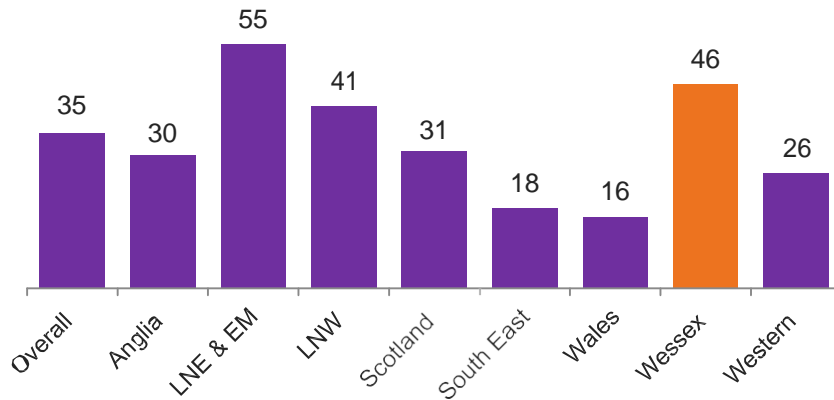
Key scores

Satisfaction with train performance varies notably across the routes, suggesting there is an inconsistent customer service delivery. Wessex is one of the strongest routes in terms of train service performance this year and although the proportion of customers that would speak highly of Network Rail is low, the figure is above 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

Taking ownership, working collaboratively and focusing on long term strategic needs are customer services attributes that are notably lower than the national average. However, customers are more likely to feel that Network Rail are open and engage with them.

Overall versus Route: % satisfied

	Overall	Wessex	Gap*
Works collaboratively	56	46	-10
Prepared to challenge	53	49	-4
Openness and engagement	50	57	+7
Effective communication	46	49	3
Focus on long term strategic needs	46	38	-8
Takes ownership	42	32	-10
Learns and applies lessons learnt	26	24	-2
Customer driven	23	25	2
Delivers what it says	22	31	+9

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 activity areas are below the national average, with route operations and franchised stations and depots being the most significantly lower

Overall versus Route: % satisfied

	Overall	Wessex	Gap*
Route operations	40	25	-15
Strategic Route planning	32	19	-13
Managed stations	29	19	-10
Franchised stations and depots	28	13	-15
Delivery of enhancements projects	28	21	-7
Timetable planning	26	21	-5
Infrastructure maintenance and renewals	25	16	-9
Access planning	18	16	-2

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

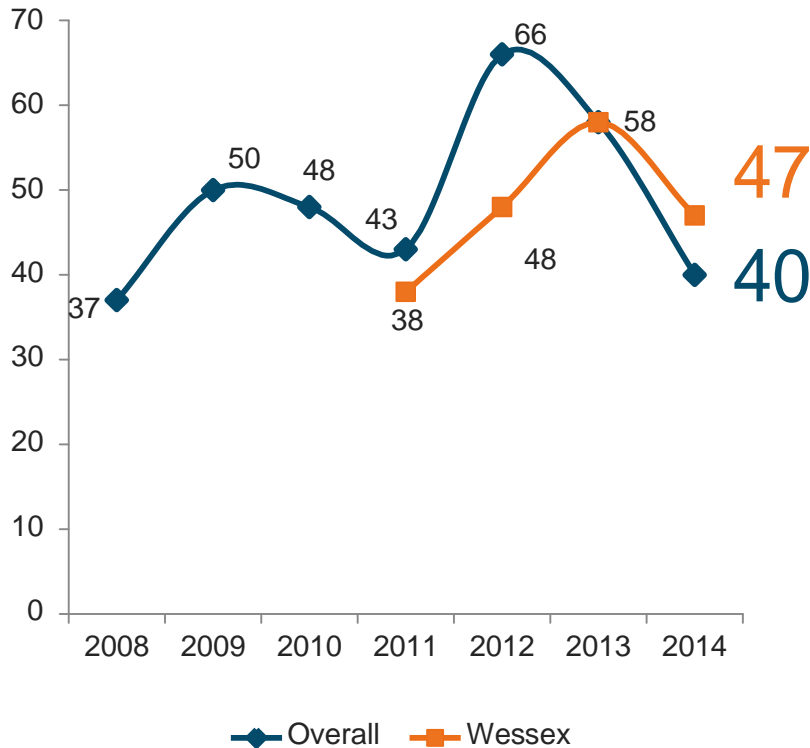
* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

Route key scores

Overall satisfaction

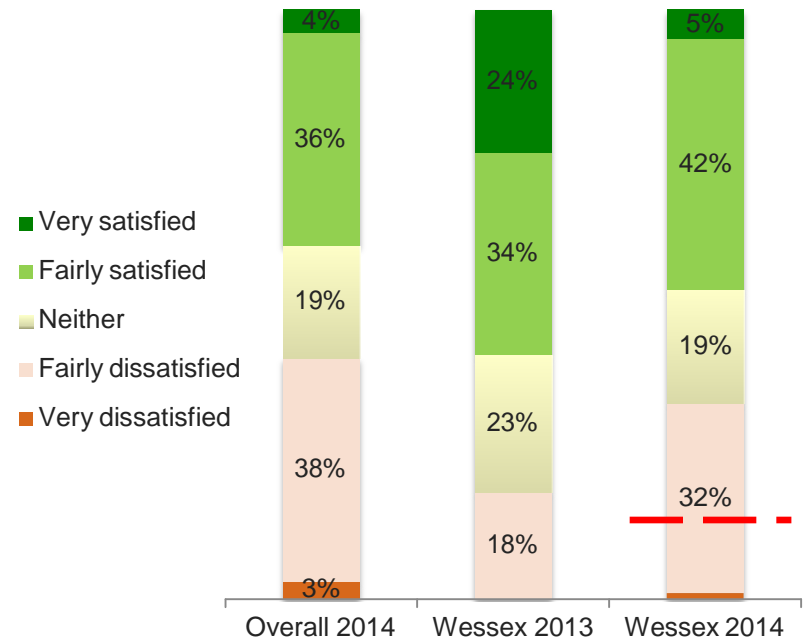
Overall satisfaction with Network Rail has dropped notably since 2013 (-11% points), with a greater proportion of customers fairly dissatisfied compared to last year

Overall satisfaction: year on year
% satisfied



Wessex overall satisfaction: response breakdown compared with previous year

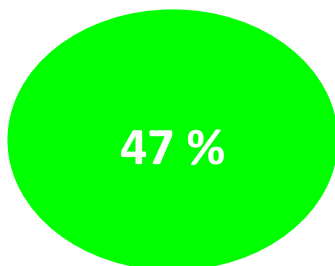
Mean = 3.00 Mean = 3.64 Mean = 3.16



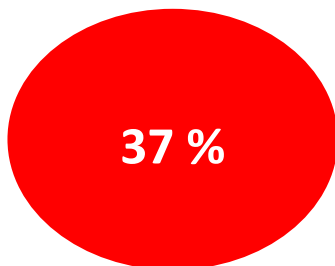
NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL

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 Wessex customers claim to be satisfied.
The key reason being **working relationships**

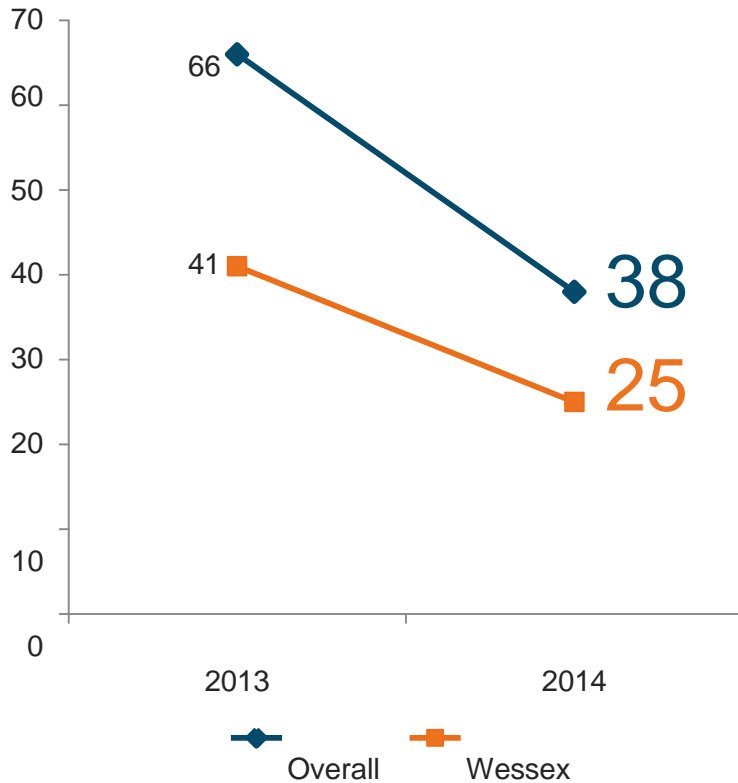


of Wessex customers claim to be dissatisfied.
The key reason being **performance, delivering on promises**

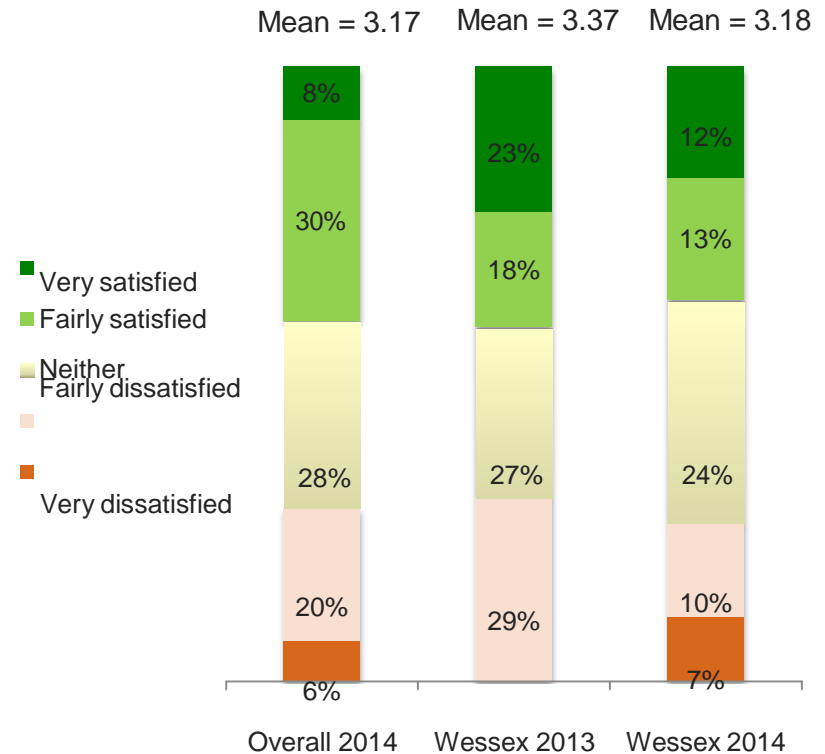
Route satisfaction

Satisfaction on Wessex route has decreased 16% points since 2013 to 25%, which is below the national average. Around a quarter of customers feel neither satisfied or dissatisfied

Route satisfaction: year on year
% satisfied

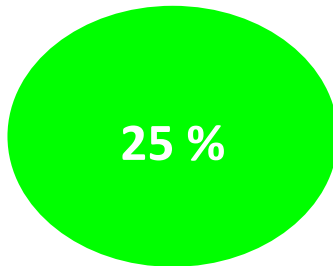


Wessex overall satisfaction:
response breakdown
compared with previous year



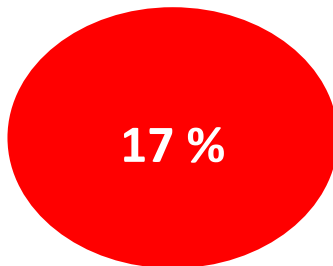
Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

Reasons for route satisfaction/dissatisfaction



of Wessex customers claim to be satisfied.

The key reasons are **customer service, working relationships, responsiveness**



of Wessex customers claim to be dissatisfied.

The key reasons are **performance, delays, ownership**

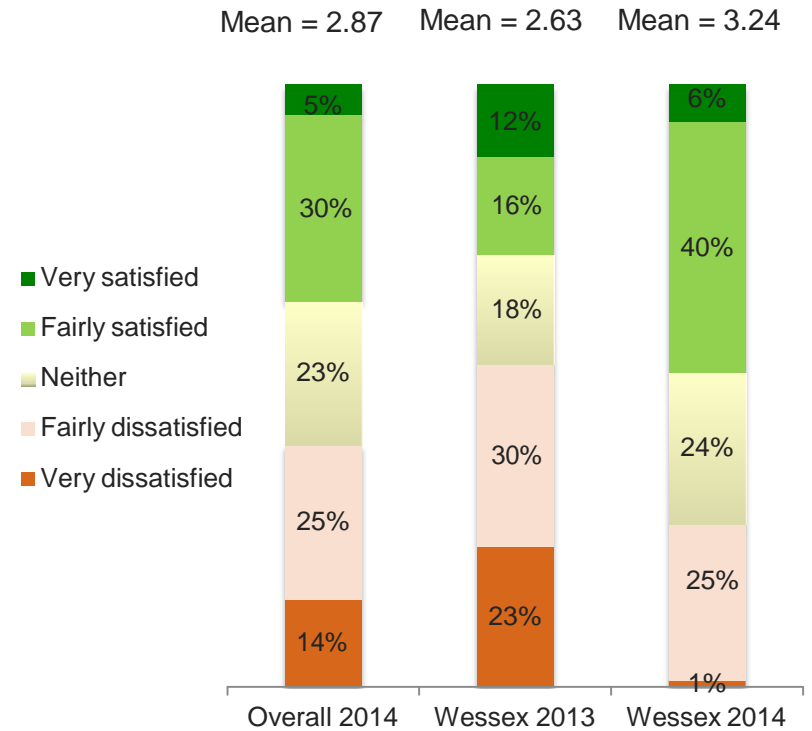
Overall train service performance

Train service performance has seen a notable increase this year and is at its highest level

Satisfaction with train service performance:
year on year
% satisfied



Wessex train service performance - response breakdown compared with previous year

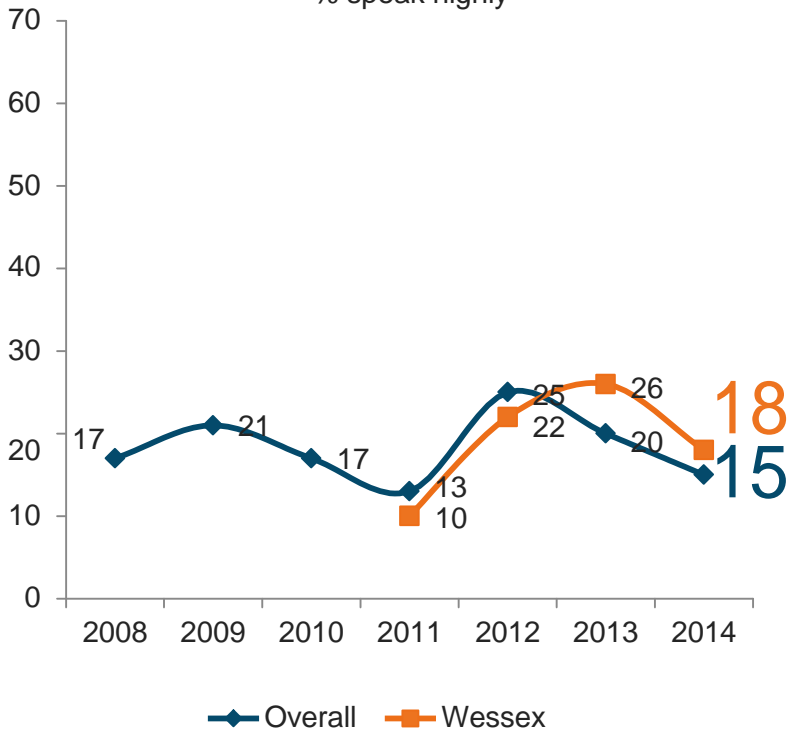


Q4c. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail's part in overall train service performance

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

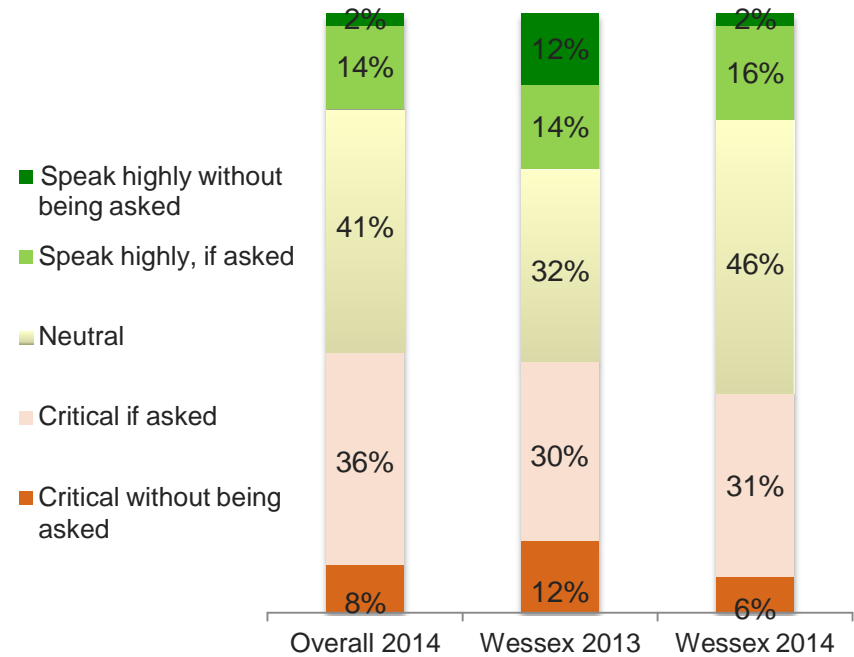
A large proportion of customers would speak critically of Network Rail on the Wessex route, however the majority would be neutral about Network Rail

Advocacy: year on year
% speak highly



Wessex advocacy - response breakdown compared with previous year

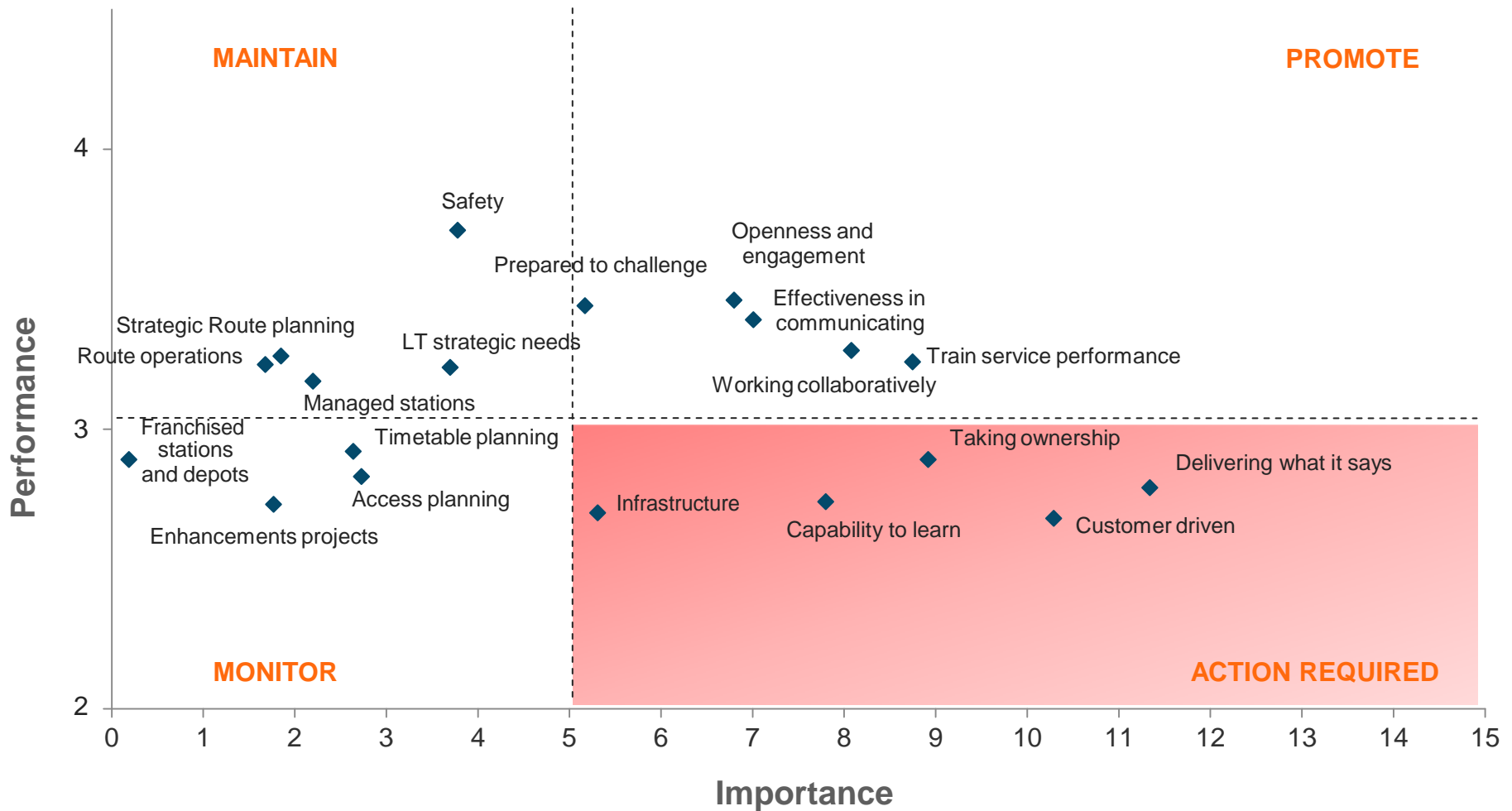
Mean = -0.35 Mean = -0.17 Mean = -0.23



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: Wessex



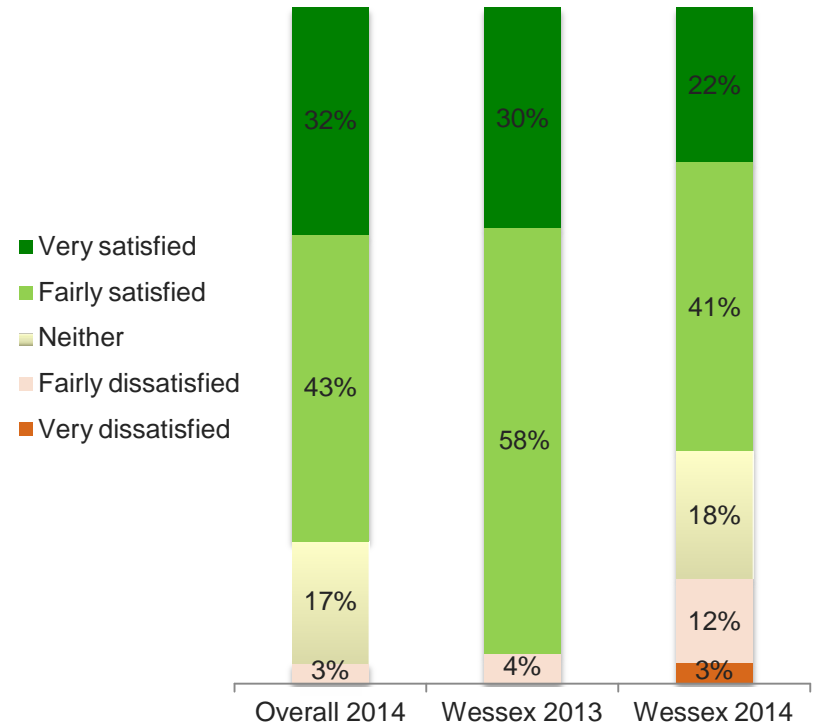
Satisfaction with safety

Safety has declined notably since 2013, with a greater proportion of customers feeling dissatisfied this year



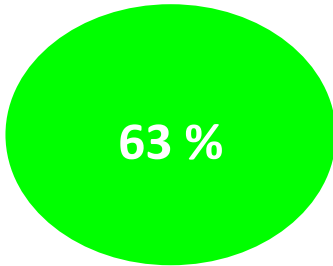
Wessex satisfaction with safety - response breakdown compared with previous year

Mean = 4.08 Mean = 4.23 Mean = 3.71



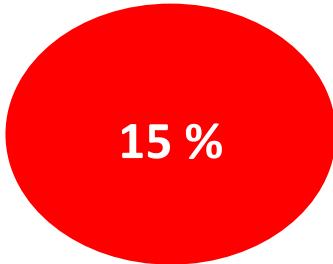
Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

Reasons for satisfaction/dissatisfaction with safety



of Wessex customers claim to be satisfied with safety.

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

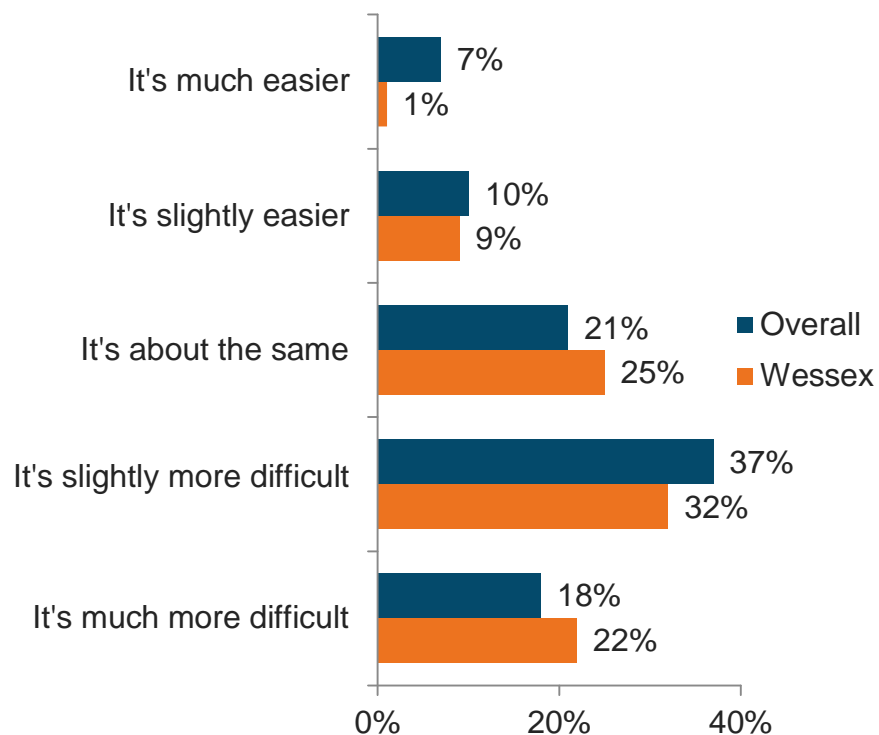


of wassex customers claim to be dissatisfied with safety.

The key reason being **recent incidents**

Working with Network Rail compared to other organisations

The majority of customers find working with Network Rail more difficult 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?

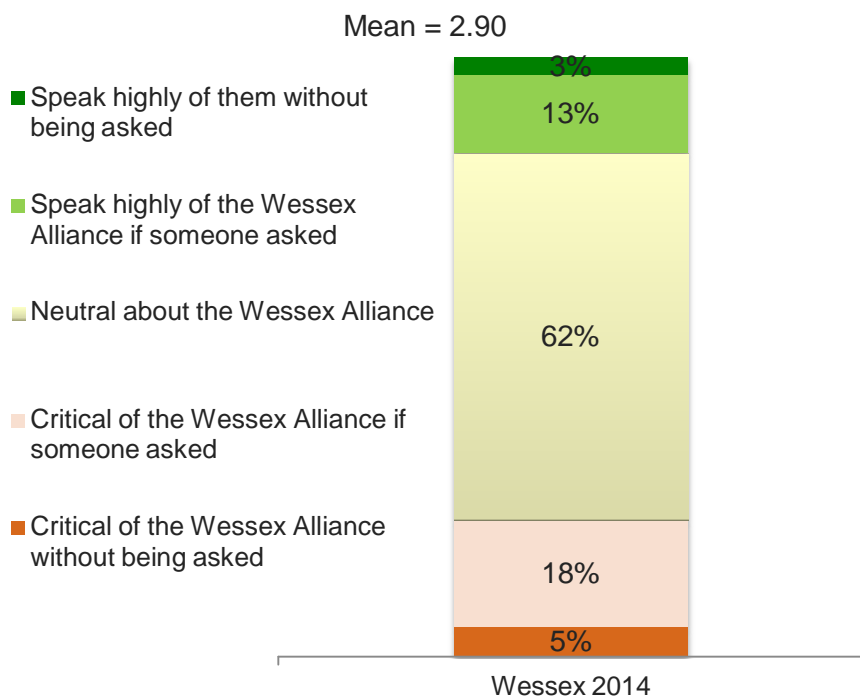
Wessex Alliance

Respondents operating on the Wessex Route were asked a number of statements which focus only on their experience with the Wessex Alliance



Advocacy of the Wessex Alliance is predominately neutral, whilst satisfaction is low on train service performance, openness & engagement, recognising/understanding needs and responsiveness

Whether customers would speak highly or critically of the Wessex Alliance



Q29. Which of these best describes how you feel about the Wessex Alliance overall, taking all you know about them into consideration? (Base: operators on the Wessex Route n=39)

















































Experiences with the Wessex Alliance in the past 12 months % satisfied

Statement	Wessex operators % satisfied
Always putting safety first	67
Train service performance	39
Openness and Engagement	38
Recognising and understanding the different needs of the operators	30
Responsiveness to your needs and your views	30

Q30. Thinking about all of your experiences with the Wessex Alliance in the past 12 months, please indicate how satisfied or dissatisfied you are with the Wessex Alliance in the following areas (Base: in brackets after each statement above)

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	3.16	-0.48	3.18	-0.19	3.24	0.61	-0.23	-0.06
TOC	CrossCountry	2%	2.80	-0.58	2.60	-0.40	2.25	-0.13	-0.60	-0.60
	First Great Western	8%	3.20	-1.13	3.40	0.40	3.00	0.33	0.00	0.33
	London OG	<1%	2.00	-1.00	1.00	-2.00	-	N/A	-1.00	-1.50
	London UG	1%	3.00	-0.50	3.00	-0.50	2.67	0.17	-0.67	-0.67
	Southern	6%	3.00	0.00	3.00	0.00	2.00	1.00	0.00	0.00
FOC	Colas	<1%	4.00	0.00	5.00	0.00	3.50	-0.50	0.50	-0.50
	DB Schenker	1%	3.25	-0.75	3.11	-0.89	3.75	1.25	-0.19	0.31
	DirectRail Services	<1%	3.00	N/A	3.00	N/A	3.10	N/A	-0.40	N/A
	Freightliner Ltd	4%	2.50	0.50	3.17	-0.83	2.75	-0.25	-1.13	-0.13
	Freightliner HH	1%	2.80	N/A	4.00	N/A	3.75	N/A	0.20	N/A
	GB Railfreight	<1%	4.00	N/A	3.14	N/A	3.56	N/A	0.33	N/A
	DCR	<1%	4.00	N/A	5.00	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
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 +/-	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...?