



Network Rail 2014 Customer Survey Report

Route Report: Western

Prepared by: 

January 2015

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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)
- 87 customers chose to answer about Western.

Route Summary

Summary

Key Findings

- The Western route performs above average on overall and route satisfaction.
- Western performs particularly well at working collaboratively, but are weak on train service performance relative to other routes.
- All activity area scores are below average, with route operations sitting 23% below average.
- Satisfaction with safety has remained high since 2013 at 83% for customers on the Western route.

Action Areas

1. Focus on low scoring customer service attributes, in particular delivering on promises, being customer driven and learning from past mistakes in order to drive satisfaction.
2. Train service performance remains an important action area and should be addressed in conjunction with improvements in infrastructure maintenance and renewals
3. Address low scores in all activity areas and particularly look to improve route operations, access planning and strategic route planning.

46% Overall Satisfaction

Overall satisfaction is above average but has seen a 12% decrease this year

43% Route Satisfaction

Route satisfaction has declined, but remains marginally above the national average

26% Train Service Performance

Although train service performance has seen an increase since last year (+5% points), it continues to perform below average

12% Advocacy

Advocacy has seen a dip since last year (-8%)

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

Route compared with overall findings

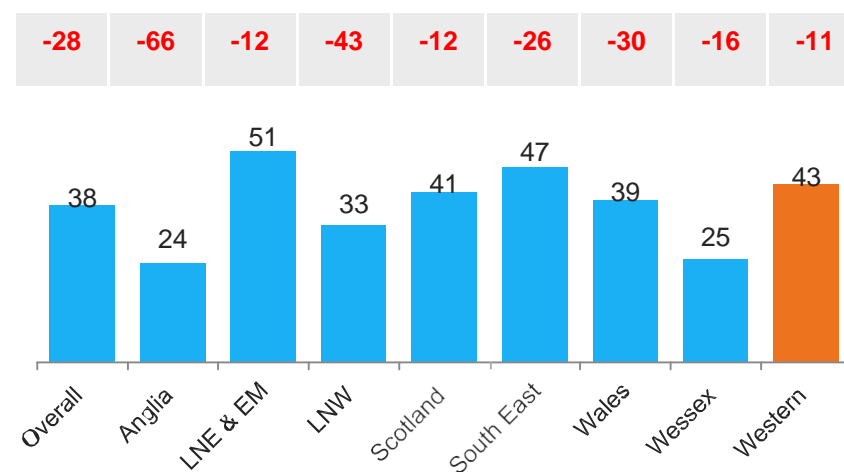
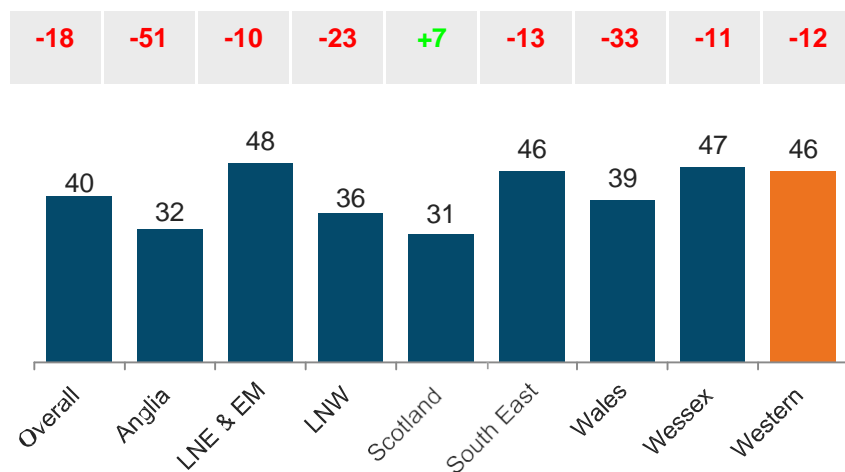
Key scores

Western performs above overall average on 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

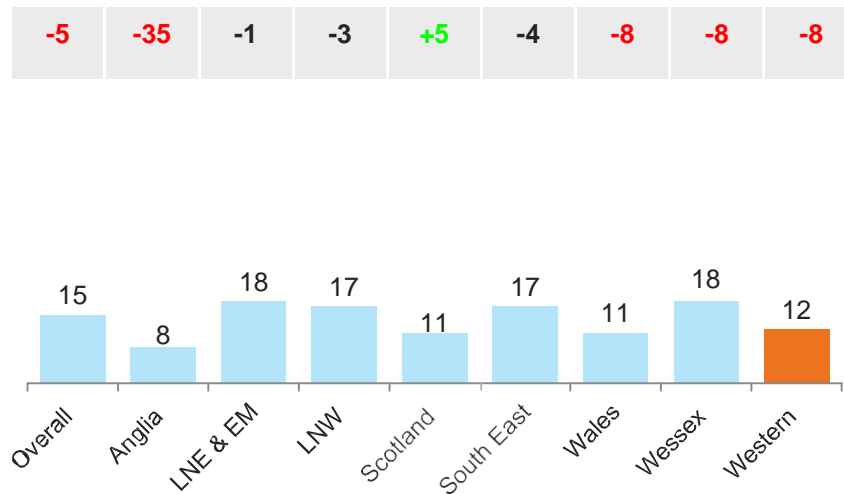
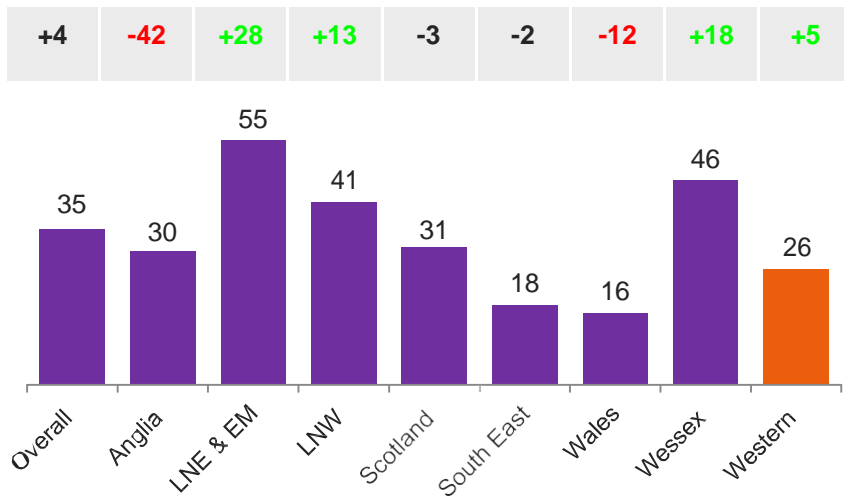
Key scores

Western scores below average on train performance but this has increased since last year. Advocacy is broadly in line with overall 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

Western scores above average for a number of attributes, in particular collaborative working.

Overall versus Route: % satisfied

	Overall	Western	Gap*
Works collaboratively	56	66	+10
Prepared to challenge	53	58	+5
Openness and engagement	50	46	-4
Effective communication	46	47	+1
Focus on long term strategic needs	46	48	+2
Takes ownership	42	43	+1
Learns and applies lessons learnt	26	20	-6
Customer driven	23	29	+6
Delivers what it says	22	25	+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

Western customers are less satisfied than average for all activity areas.

Overall versus Route: % satisfied

	Overall	Western	Gap*
Route operations	40	17	-23
Strategic Route planning	32	24	-8
Managed stations	29	22	-7
Franchised stations and depots	28	27	-1
Delivery of enhancements projects	28	26	-2
Timetable planning	26	24	-2
Infrastructure maintenance and renewals	25	21	-4
Access planning	18	17	-1

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

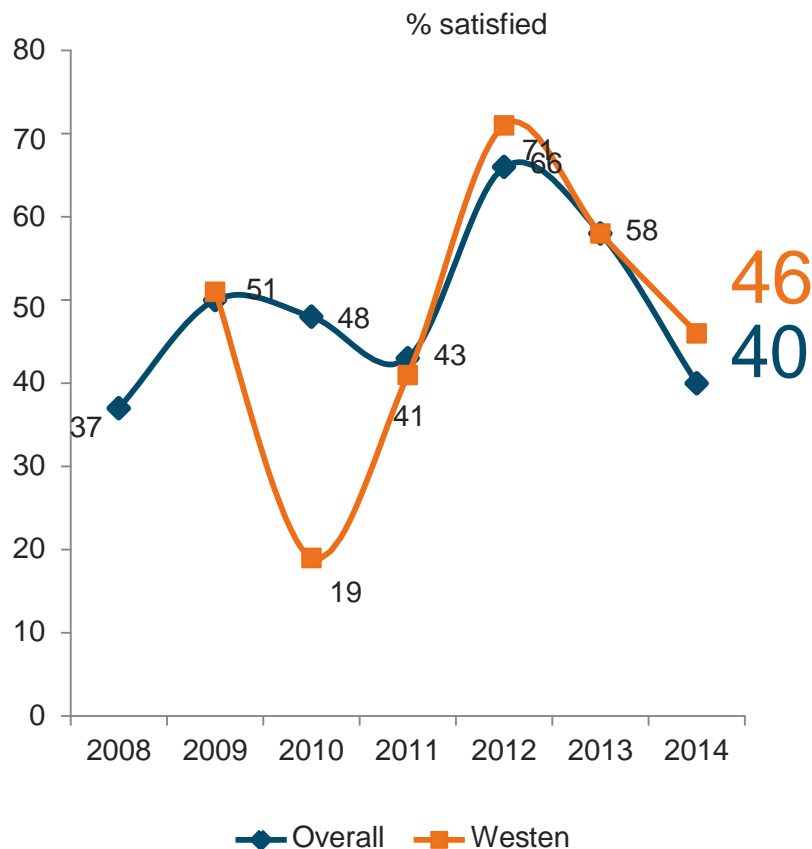
* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

Route key scores

Overall satisfaction

Satisfaction has declined on the Western route but is still above the overall average with no 'very dissatisfied' ratings.

Overall satisfaction: year on year



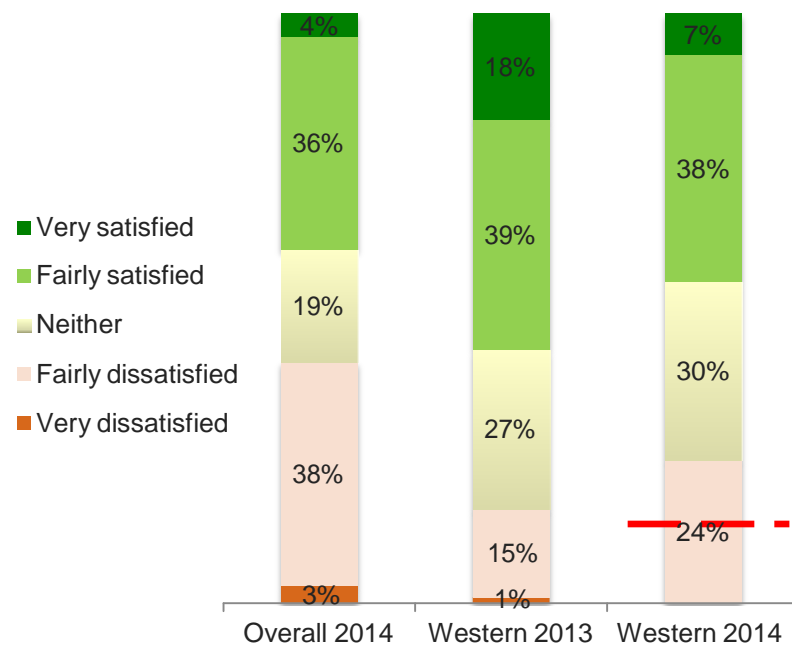
Q1. Taking into account all of your experiences with Network Rail during the last 12 months as a whole, how satisfied or dissatisfied are you with Network Rail?

Western overall satisfaction:

response breakdown

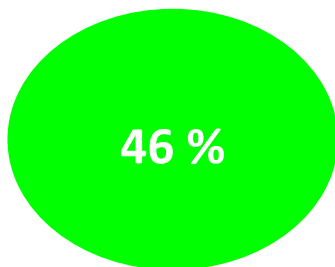
compared with previous year

Mean = 3.00 Mean = 3.60 Mean = 3.28



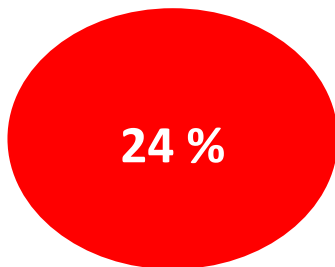
NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL

Reasons for overall satisfaction/dissatisfaction



of Western customers claim to be satisfied.

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



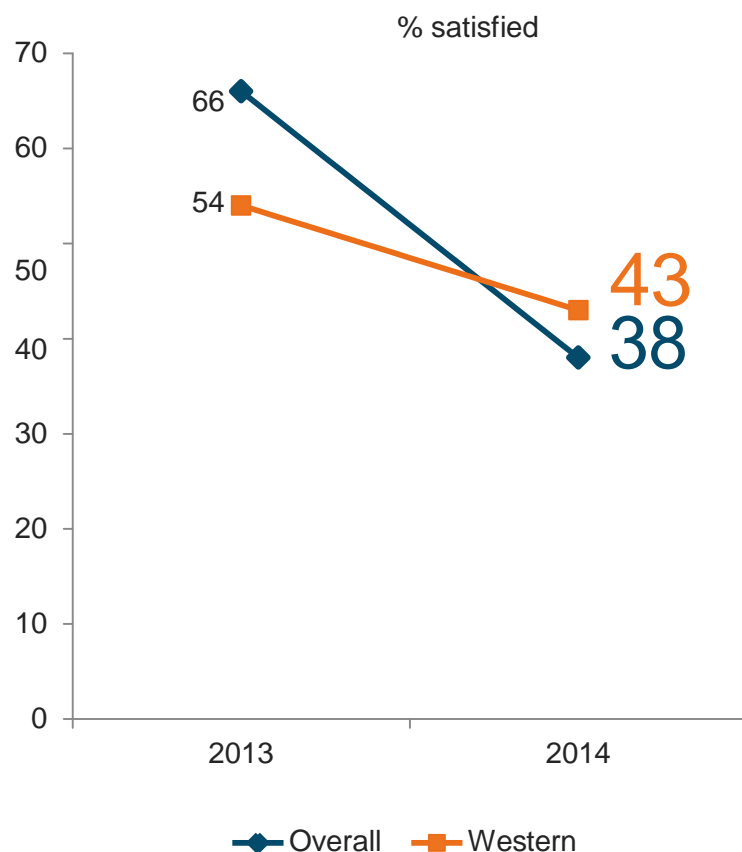
of Western customers claim to be dissatisfied.

The key reasons are **failure to deliver and the inability to meet targets**

Route satisfaction

Customers on the Western route are less satisfied than last year, but satisfaction has declined by less than the overall average.

Route satisfaction: year on year



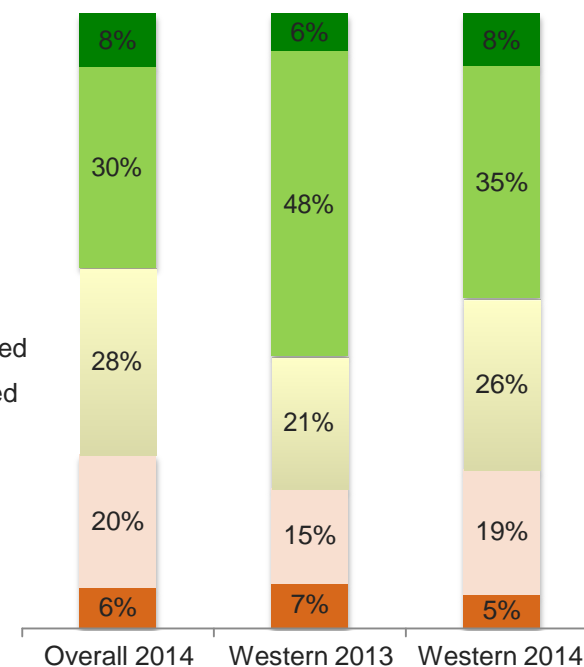
Western overall satisfaction:

response breakdown

compared with previous year

Mean = 3.40 Mean = 3.32 Mean = 3.25

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



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

Reasons for route satisfaction/dissatisfaction



46 %

of Western customers claim to be satisfied.
The key reasons are **collaborative relationships,**
customer focus



24 %

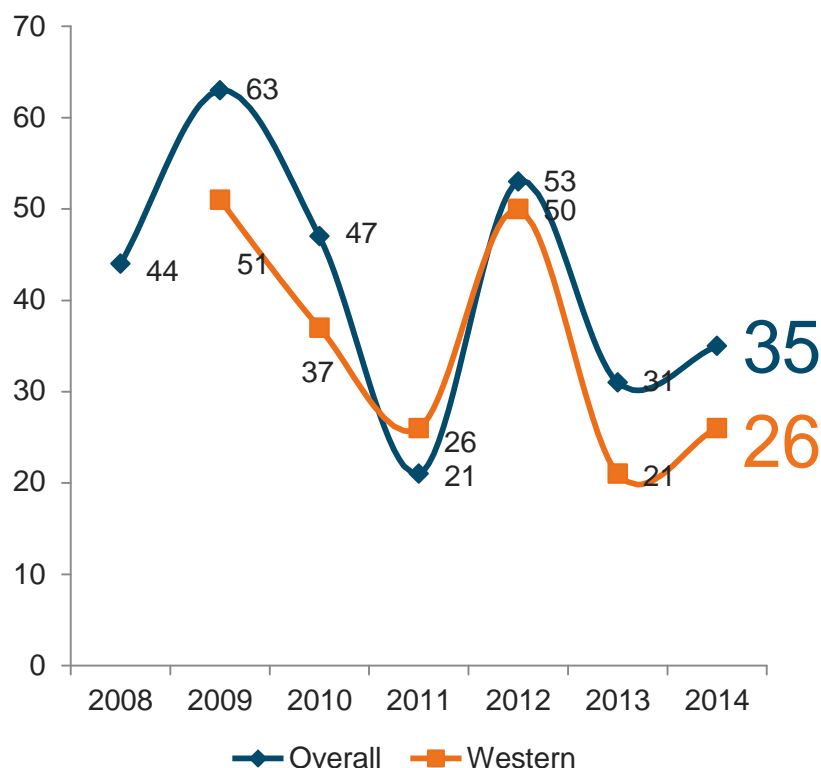
of Western customers claim to be dissatisfied.
The key reasons are **disorganised team, poor**
communication, poor access planning

Overall train service performance

Satisfaction with train performance has increased on Western since last year and the proportion of dissatisfied customers has substantially decreased.

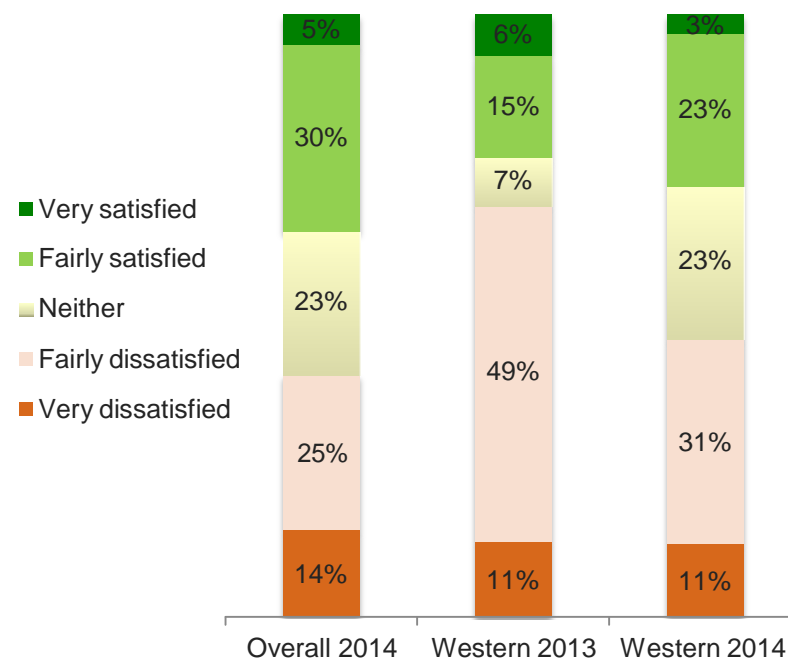
Satisfaction with train service performance:

year on year
% satisfied



Western train service performance - response breakdown
compared with previous year

Mean = 2.87 Mean = 2.50 Mean = 2.73



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

Customer perspective on train service performance

Western customers believe Network Rail **performs well** on train service performance for the following key reasons:

Information sharing, good response to issues

Western customers believe Network Rail **needs to improve** on train service performance for the following key reasons:

Poor infrastructure reliability, lack of communication between areas, marginalising of smaller operators.

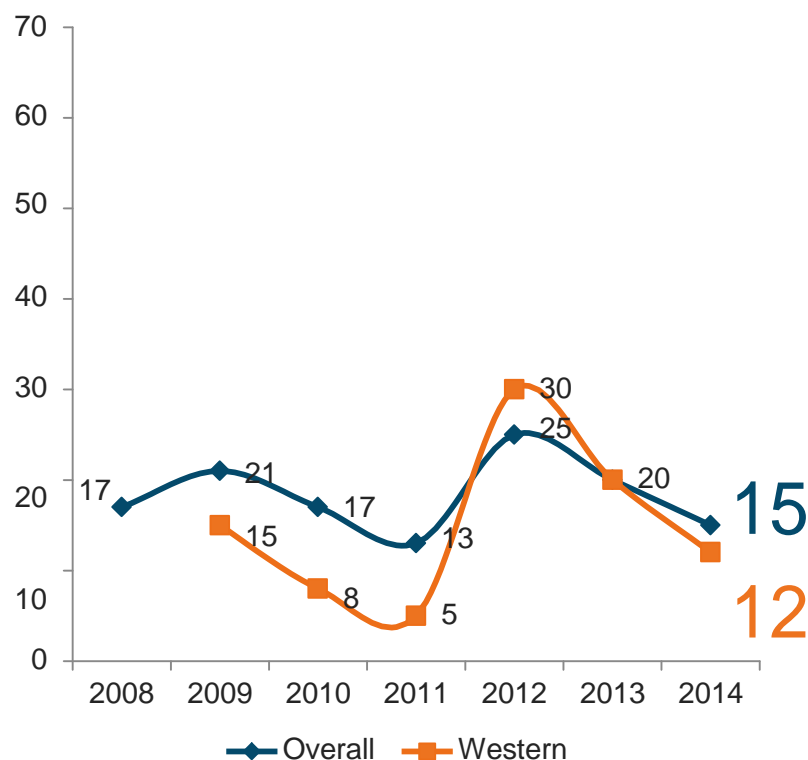
Q5/Q6 If satisfied at Q4: You said that you were [satisfied] with Network Rail's part in overall train service performance, what is Network Rail doing well and is there anything that they could do to improve this experience further?

Q5/Q6 If neutral/dissatisfied at Q4: You said that you were [neutral/dissatisfied] with Network Rail's [attribute selected], what could Network Rail do to make you satisfied in this area?

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

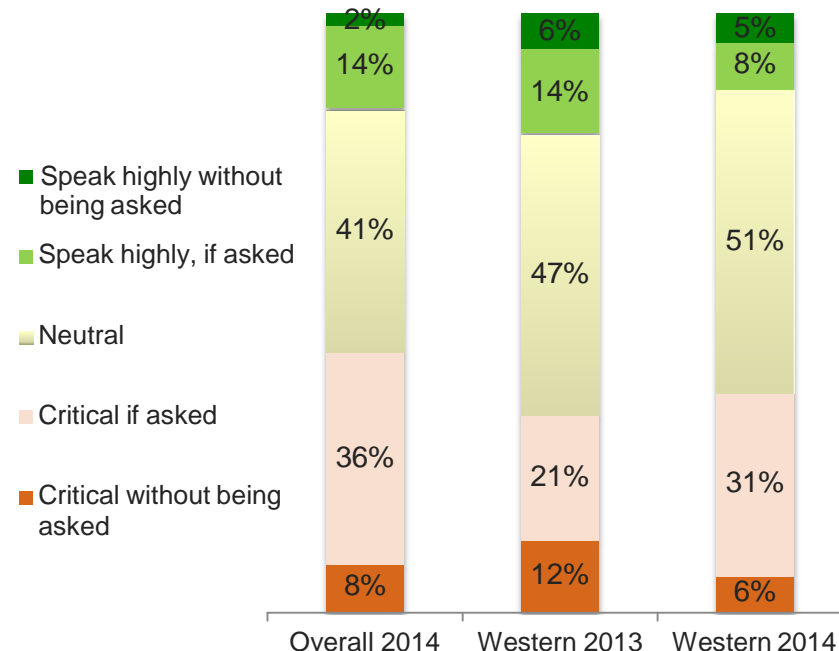
Advocacy scores have fallen 8 points since 2013 and Western is now below average.

Advocacy: year on year
% speak highly



Western advocacy - response breakdown compared with previous year

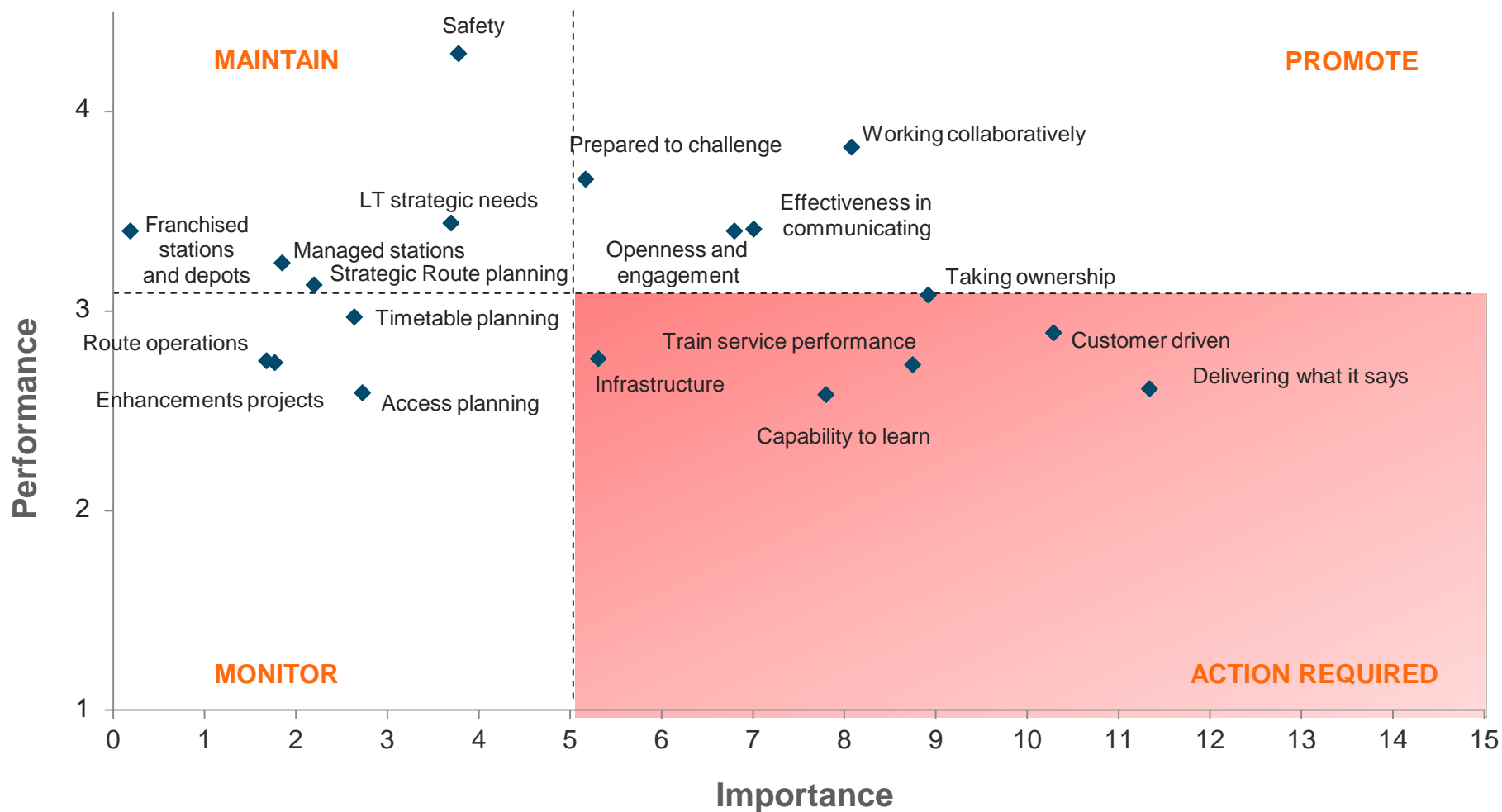
Mean = -0.35 Mean = -0.19 Mean = -0.26



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

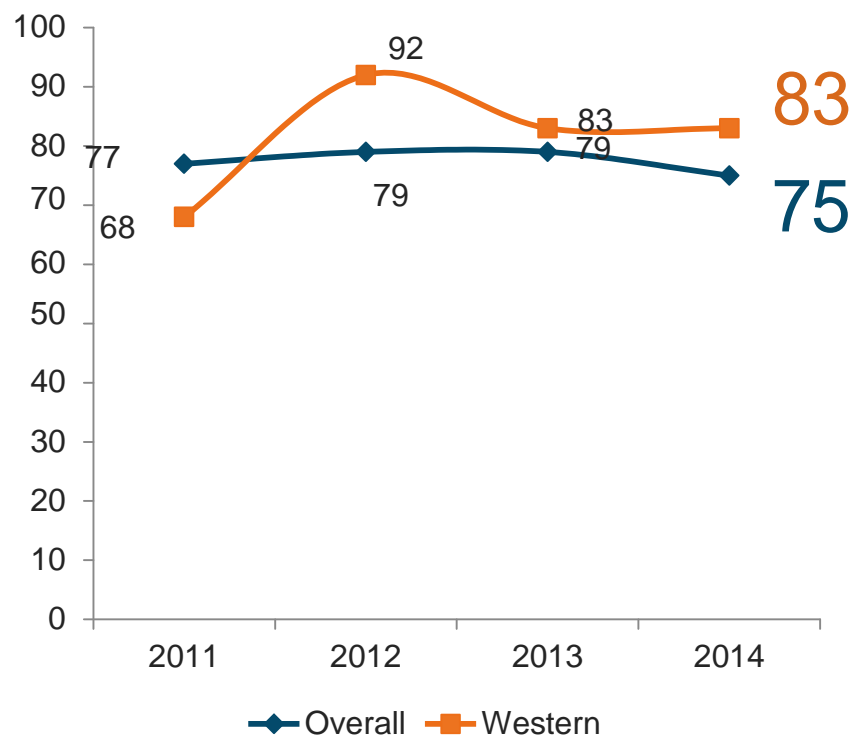
Drivers of satisfaction against route performance: Western



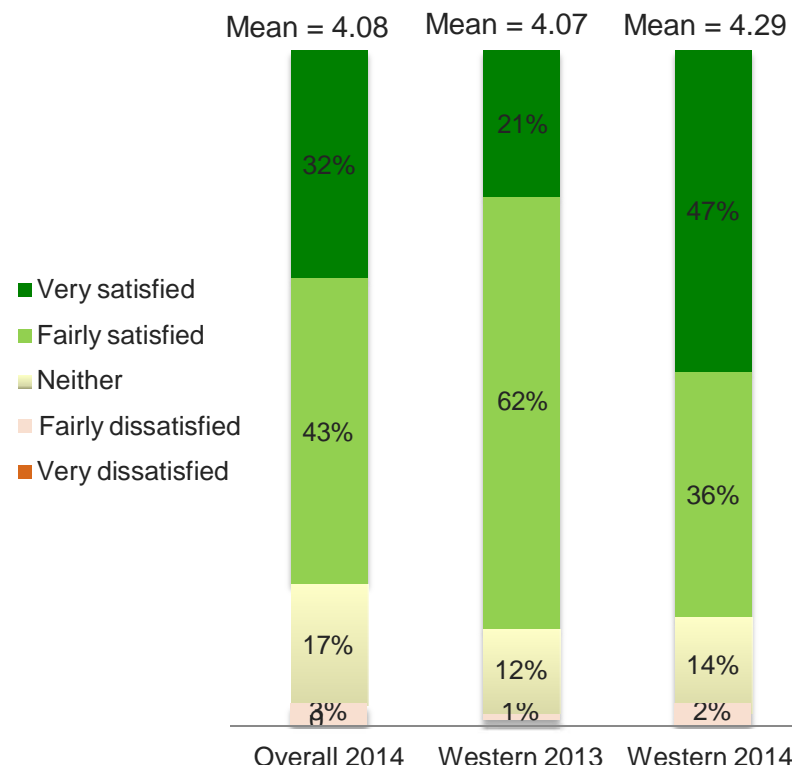
Satisfaction with safety

Satisfaction with safety is high, with a much higher proportion of 'very satisfied' Western customers than last year.

Satisfaction with safety:
year on year
% satisfied

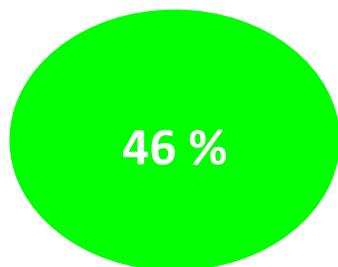


Western satisfaction with safety - response breakdown compared with previous year



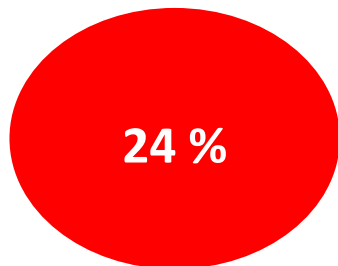
Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

Reasons for satisfaction/dissatisfaction with safety



of Western customers claim to be satisfied with safety.

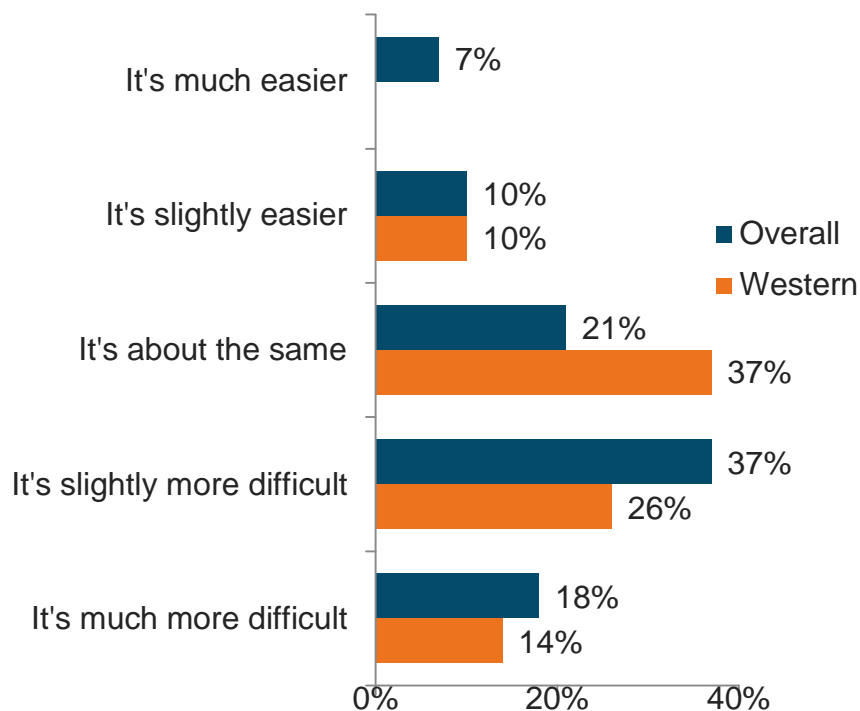
The key reason is **the perception that safety is a priority for Network Rail and is embedded into the organisation**



of Western customers claim to be dissatisfied with safety

Working with Network Rail compared to other organisations

Two fifths (40%) of Western route customers find it more difficult to work with Network Rail, but this is lower than the overall figure (55%)



















































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	
			2013/2014		2013/2014		2013/2014		2013/2014	
			2014	+/-	2014	+/-	2014	+/-	2014	+/-
	Overall Route Score	Total	3.28	 -0.32	3.25	 -0.07	2.73	 0.23	-0.26	 -0.07
TOC	Arriva Wales	1%	3.33	 0.08	3.33	 0.08	2.67	 -0.83	-0.33	 0.17
	CrossCountry	16%	3.00	 -0.44	3.43	 0.05	2.80	 0.36	-0.57	 -0.68
	First Great Western	69%	3.33	 -0.42	3.14	 -0.19	2.57	 0.17	-0.20	 0.05
	Heathrow Exp	3%	4.20	 1.77	3.60	 0.74	3.20	 1.49	0.40	 0.97
	First Hull Trains	<1%	4.00	N/A	3.00	N/A	4.00	N/A	-2.00	N/A
	London Midlands	2%	3.33	 0.33	3.67	 0.50	3.33	 -0.10	-0.67	 -0.81
	London Underground	<1%	4.00	N/A	3.00	N/A	3.00	N/A	0.00	N/A
FOC	Colas	<1%	4.00	 1.00	5.00	 1.00	3.50	 0.00	0.50	 0.50
	DB Schenker	5%	3.25	 -0.75	3.27	 -0.40	3.75	 0.75	-0.19	 0.14
	DirectRail Services	<1%	3.00	N/A	3.40	N/A	3.10	N/A	-0.40	N/A
	Freightliner Ltd	2%	2.50	 0.50	3.80	 0.80	2.75	 -0.25	-1.13	 -0.13
	Freightliner Heavy Haul	1%	2.80	 0.80	3.75	 -0.25	3.75	 -0.25	0.20	 1.20
	GB Railfreight	<1%	4.00	N/A	3.86	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
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...?