NetworkRail

Network Rail 2015 Customer Survey Report

Route Report: Anglia

Prepared by: **GfK**

December 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 7th and 16th October, 2015.

Sample

- GfK interviewed senior Network Rail customers from TOCs and FOCs from sample provided by Network Rail

- 411 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

- 282 interviews were achieved
  - 6 telephone interviews
  - 276 online interviews
- Overall response rate of 69% (70% in 2014 & 77% in 2013)
- 81 customers chose to answer about Anglia.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have improved since last year.
- Notable increase for train service performance, and above the overall average. However, this remains some way behind the levels seen in 2013.
- In terms of customer service attributes, Anglia performs particularly well on 'being prepared to challenge' and has improved considerably on 'Delivering what it says it will'
- 'Being customer driven' and 'caring for rail passengers' perform the least well.

Action Areas

1. Being more customer driven and caring for passengers are areas of focus, both impacting significantly on overall satisfaction.

2. Despite the increase, train service performance should still continually be improved.

3. Timetable planning is moving in the right direction, but is an important driver to satisfaction and should be a continued area of focus.

45% Overall Satisfaction

Overall satisfaction has seen a significant increase this year (+13% points)

53% Route Satisfaction

Route satisfaction has increased notably since last year and performs above the national average of 46%

48% Train Service Performance

Train service performance has also increased since last year (+18% points) and is ahead of the overall national average of 39%.

11% Advocacy

Advocacy has increased by 3% compared to last year.

Green is an increase of 5% or more, Red is a decrease of 5% or more on 2014
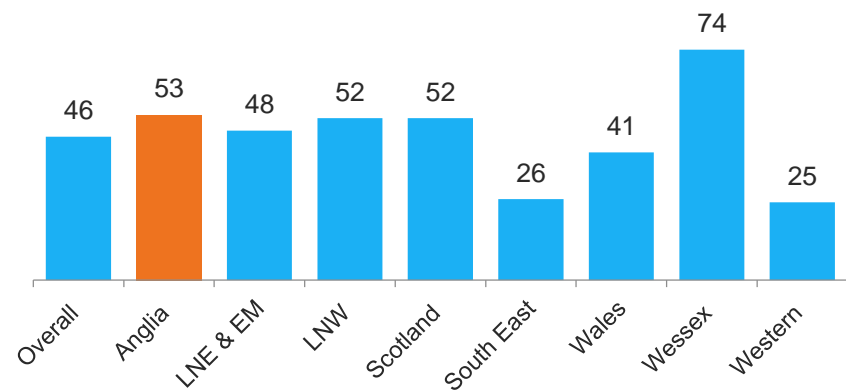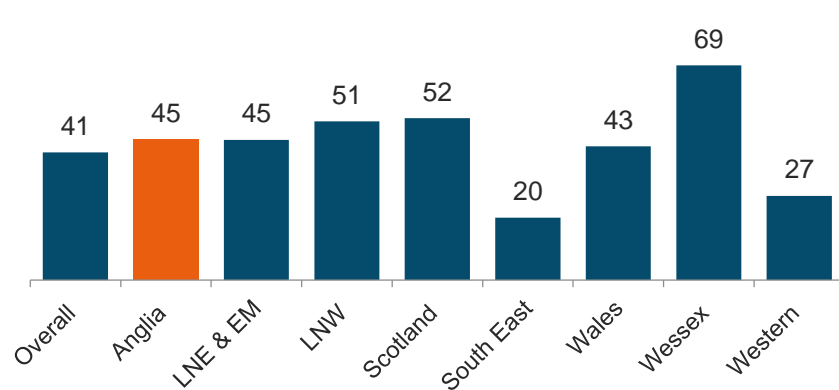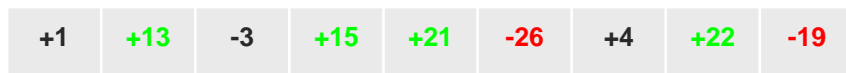
Route compared with overall findings

Key scores

Anglia satisfaction is above average at both an overall and route level, with substantial increases since 2014

Overall satisfaction
% satisfied

% change since 2014

+1	+13	-3	+15	+21	-26	+4	+22	-19

Overall: 41
Anglia: 45
LNE & EM: 45
LNW: 51
Scotland: 52
South East: 20
Wales: 43
Wessex: 69
Western: 27

Route satisfaction
% satisfied

+8	+29	-3	+19	+11	-21	-2	+49	-18

Overall: 46
Anglia: 53
LNE & EM: 48
LNW: 52
Scotland: 52
South East: 26
Wales: 41
Wessex: 74
Western: 25

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 2014

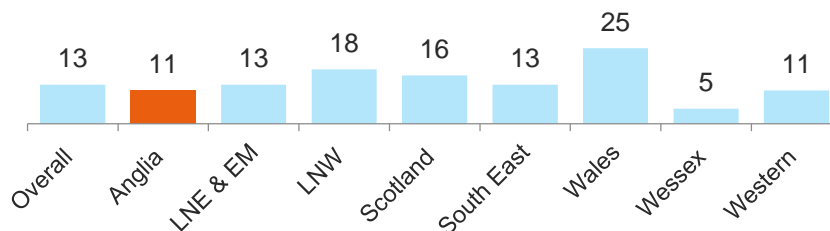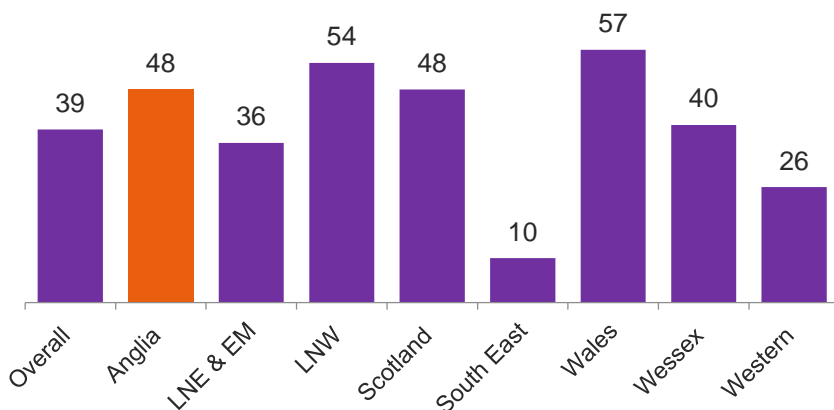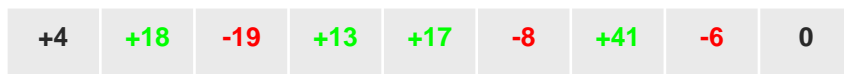*A better railway for a better Britain*

Key scores

Satisfaction with train service performance has improved by 18%pts and is above the overall average. Whilst advocacy has improved slightly, it is still behind overall average

Satisfaction with train service performance
% satisfied

% change since 2014

+4	+18	-19	+13	+17	-8	+41	-6	0

Overall	Anglia	LNE & EM	LNW	Scotland	South East	Wales	Wessex	Western
39	48	36	54	48	10	57	40	26

Advocacy
% would speak highly

-2	3	-5	+1	+5	-4	+14	-13	-1

Overall	Anglia	LNE & EM	LNW	Scotland	South East	Wales	Wessex	Western
13	11	13	18	16	13	25	5	11

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

Customer service attributes satisfaction

Anglia performs above the overall average for the majority of customer service attributes, in particular prepared to challenge and delivering what it says it will

Overall versus Route: % satisfied

	Overall	Anglia	Gap*
Works collaboratively	53	55	+2
Prepared to challenge	53	69	+16
Effective communication	42	45	+3
Focus on long term strategic needs	33	29	-4
Takes ownership	37	38	+1
Learns and applies lessons learnt	21	18	-3
Customer driven	19	11	-8
Delivers what it says	22	35	+13
Cares about rail passengers	22	20	-2
Can be trusted to improve Britain's railways	27	33	+6

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

Route operations, timetable planning and access planning are strengths for Anglia, relative to the overall average and are important in driving overall satisfaction

Overall versus Route: % satisfied

	Overall	Anglia	Gap*
Route operations	42	61	+19
Strategic Route planning	32	30	-2
Managed stations	31	29	-2
Franchised stations and depots	26	23	-3
Delivery of enhancements projects	21	19	-2
Timetable planning	24	34	+10
Infrastructure maintenance and renewals	26	31	+5
Access planning	22	33	+11

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 with Anglia has recovered slightly from the drop we saw last year, with an increase of 14%pts

Overall satisfaction: year on year

% satisfied

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?

Anglia overall satisfaction:

response breakdown
compared with previous year

Mean = 3.05   Mean = 3.05   Mean = 3.38

- ■ Very satisfied
- ■ Fairly satisfied
- Neither
- Fairly dissatisfied
- ■ Very dissatisfied
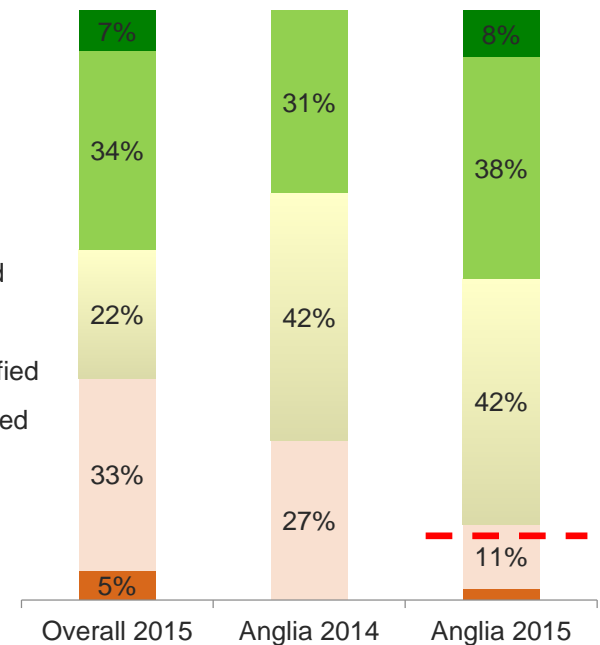
NET DISSATISFACTION SHOULD NOT EXCEED **15%** AT ROUTE LEVEL

Reasons for overall satisfaction/dissatisfaction

45% of Anglia customers claim to be satisfied. The key reasons are **communication and collaboration with NR representatives**

13% of Anglia customers claim to be dissatisfied. The key reasons are **instability and inconsistency**

Route satisfaction

Anglia route satisfaction has increased by 29%pts since last year and is 8%pts above the overall national average

Route satisfaction: year on year
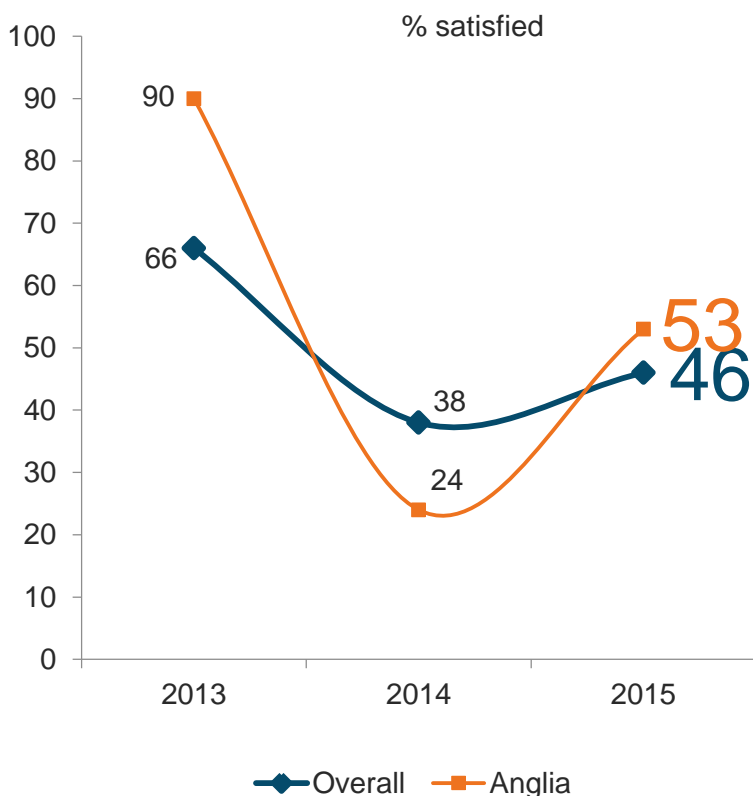
% satisfied

Anglia route satisfaction:
response breakdown
compared with previous year

Mean = 3.30   Mean = 3.10   Mean = 3.45
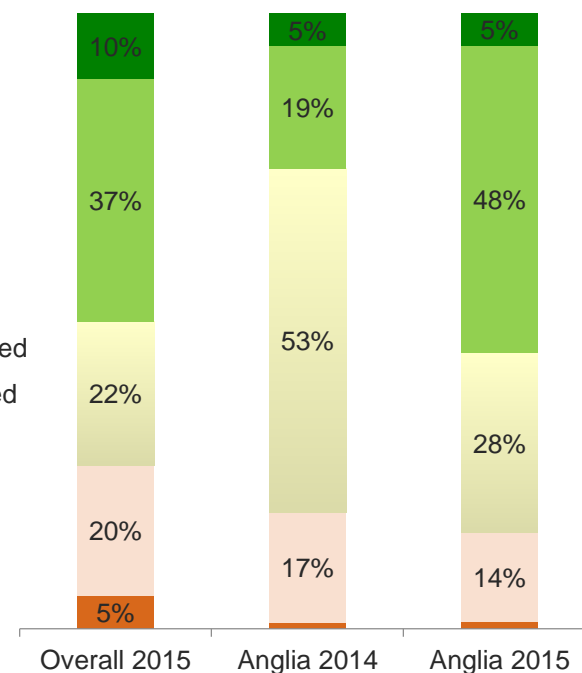
Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

Reasons for route satisfaction/dissatisfaction

53% of Anglia customers claim to be satisfied. The key reasons are **customer focus, collaborative working and reliability**

14% of Anglia customers claim to be dissatisfied. The key reasons are **lack of communication and high staff turnover**

Overall train service performance

Anglia customers are more satisfied with train service performance this year, with an increase of 18%pts and a score 9%pts above overall average

Satisfaction with train service performance:

year on year

% satisfied

Anglia train service performance - response breakdown compared with previous year
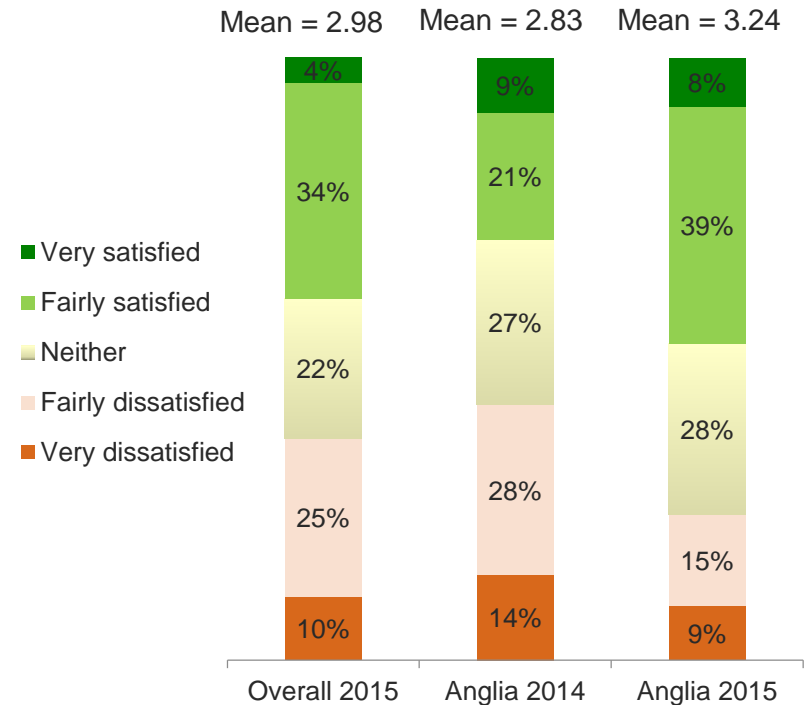
Mean = 2.98   Mean = 2.83   Mean = 3.24

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

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

Anglia customers believe Network Rail **performs well** on train service performance for the following key reasons: **supportive team, reliable infrastructure**

Anglia customers believe Network Rail **needs to improve** on train service performance for the following key reasons: **errors and slow response times**

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

Although advocacy is slightly lower amongst Anglia customers than the overall average, Anglia customers are notably less likely to speak critically

Advocacy: year on year

% speak highly

Legend: ◆ Overall ■ Anglia
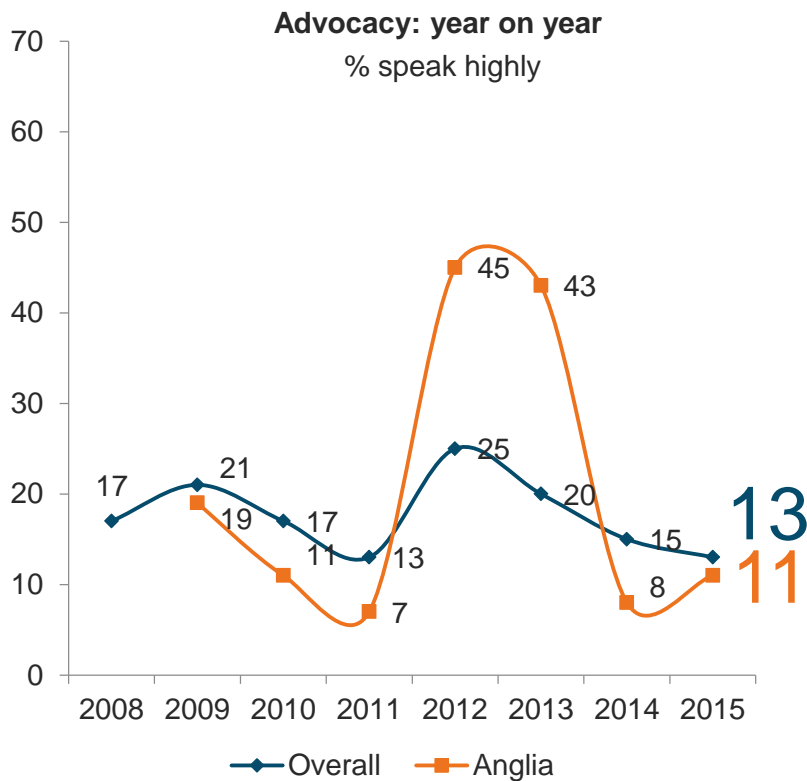
Anglia advocacy - response breakdown compared with previous year

Mean = -0.43   Mean = -0.29   Mean = -0.18

- ■ Speak highly without being asked
- ■ Speak highly, if asked
- Neutral
- Critical if asked
- ■ Critical without being asked

	Overall 2015	Anglia 2014	Anglia 2015
Speak highly without being asked	1%	8%	2%
Speak highly, if asked	12%		9%
Neutral	41%	56%	67%
Critical if asked	35%	34%	13%
Critical without being asked	11%		9%
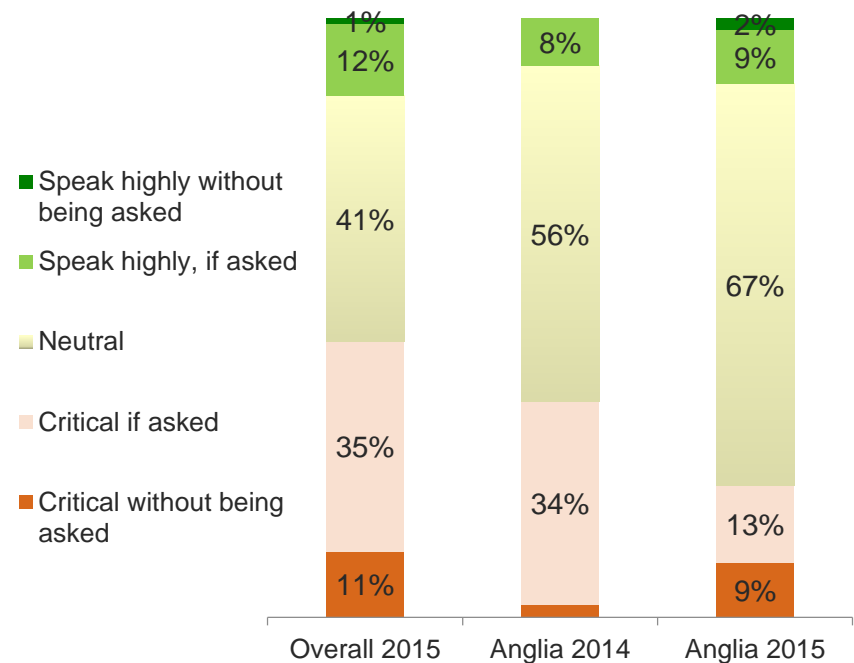
Q3. Which of these best describes how you feel about Network Rail as an organisation overall, taking all you know about them into consideration?

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Additional findings

Drivers of satisfaction against route performance: Anglia

MAINTAIN

PROMOTE

Performance

Importance

- Safety
- Route operations
- Prepared to challenge
- Franchised stations
- Strategic route planning
- Access planning
- Taking ownership
- Train service performance
- Delivering what it says
- Working collaboratively
- Managed stations
- Timetable planning
- Focus on LT Strategic needs
- Effectiveness in communicating
- Trusted to improve Britain's railways
- Infrastructure
- Enhancement projects
- Capability to learn
- Cares about passengers/customers
- Customer driven

Customer driven and cares about passengers/freight customers have low performance scores but a large impact in driving overall satisfaction

MONITOR

ACTION REQUIRED

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Satisfaction with safety

Satisfaction with safety has increased this year and is now broadly in line with the overall average

Satisfaction with safety:
year on year
% satisfied

Overall: 77, 79, 79, 75, 73
Anglia: 73, 83, 79, 69, 74

— Overall — Anglia
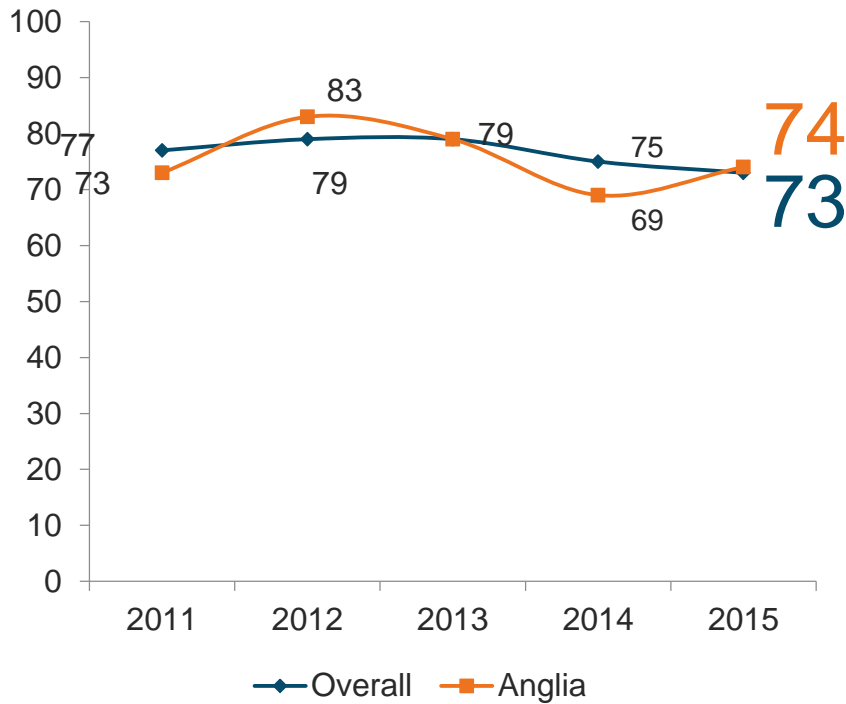
Anglia satisfaction with safety - response breakdown compared with previous year

Mean = 3.92   Mean = 3.75   Mean = 4.05

	Overall 2015	Anglia 2014	Anglia 2015
Very satisfied	26%	11%	29%
Fairly satisfied	46%	58%	45%
Neither	12%	11%	10%
Fairly dissatisfied	9%	10%	1%
Very dissatisfied			

■ Very satisfied
■ Fairly satisfied
■ Neither
■ Fairly dissatisfied
■ Very dissatisfied
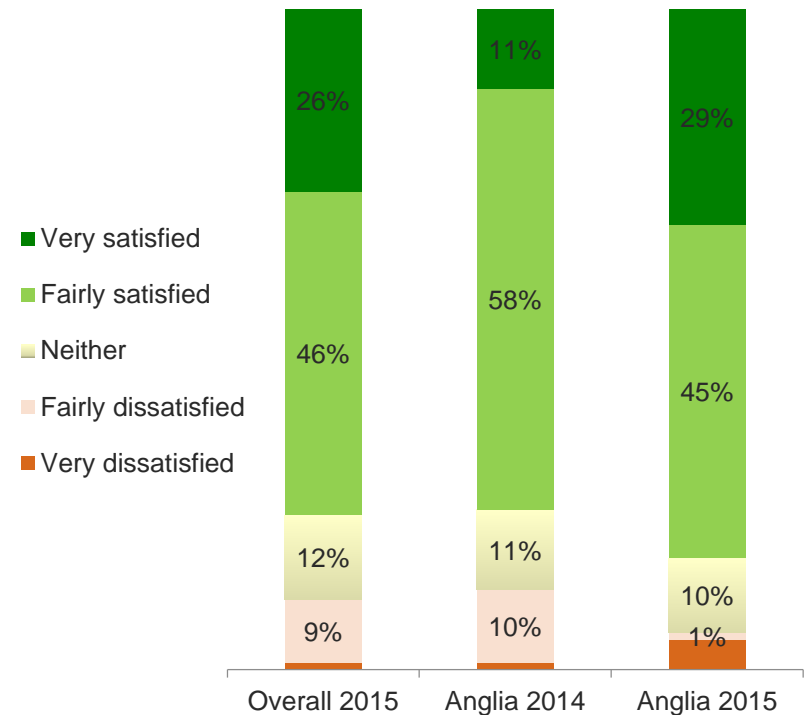
Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

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Reasons for satisfaction/dissatisfaction with safety

74% of Anglia customers claim to be satisfied with safety. The key reasons are **a continuous focus on safety and the visibility that safety is embedded into Network Rail as an organisation**

5% of Anglia customers claim to be dissatisfied with safety. The key reason is **the risk that prioritising safety in some areas, creates risks elsewhere**

Working with Network Rail compared to other organisations

A higher proportion of Anglia customers find it easier or the same to work with Network Rail then the overall average. Customers find it easy to work with the route teams, but not Network Rail at a corporate level
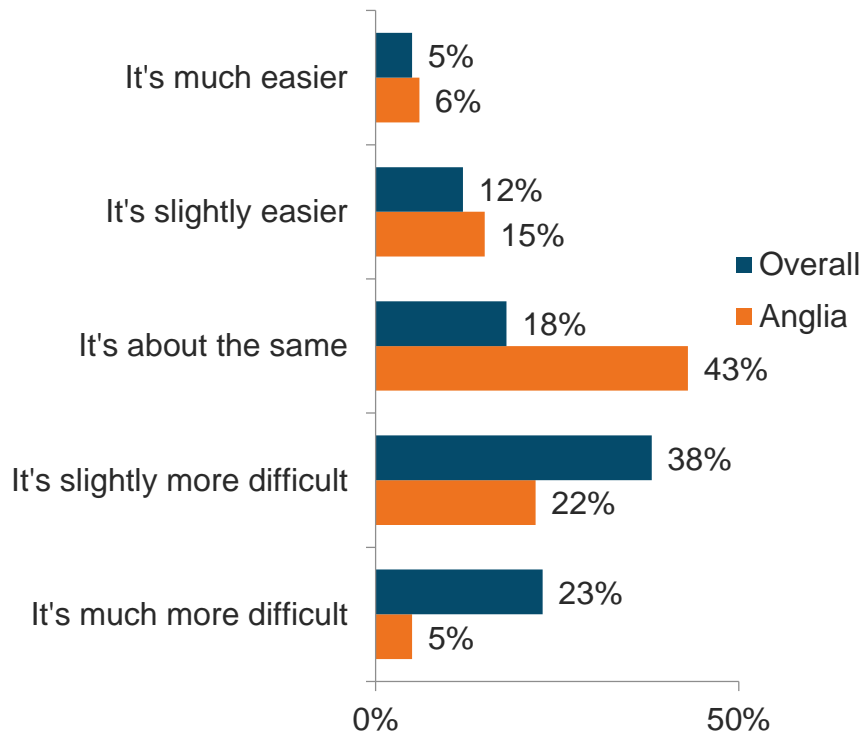
Q7. Compared with other organisations you work with, how do you find working with Network Rail?
Q8. Why do you say that?

NetworkRail

Appendix

Key scores

Mean Scores	Overall satisfaction		Route satisfaction		Train Performance		Advocacy	
	2015	2014/2015 +/-	2015	2014/2015 +/-	2015	2014/2015 +/-	2015	2014/2015 +/-
Total mean score	**3.05** 🟡	**0.05**	**3.3** 🟢	**0.13**	**2.98** 🟢	**0.11**	**-0.43** 🟡	**-0.08**
TOC/FOC								
TOC	3.00 🟡	0.02	3.18 🟡	0.08	2.92 🟢	0.11	-0.48 🟡	-0.12
FOC	3.65 🟢	0.46	3.65 🟢	0.17	3.67 🟢	0.17	0.09 🟡	0.28
Route								
Route average	**3.14** 🟡	**0.09**	**3.16** 🟡	**-0.01**	**3.06** 🟡	**0.19**	**-0.38** 🟡	**-0.05**
Anglia	3.38 🟡	0.33	3.45 🟡	0.35	3.24 🟡	0.41	-0.18 🟡	0.11
Wales	3.29 🟡	0.31	3.29 🟡	0.18	3.68 🟢	1.15	-0.31 🟡	0.10
Wessex	3.64 🟡	0.48	3.88 🟢	0.70	3.15 🟡	-0.09	-0.53 🟡	-0.30
Western	2.64 🔴	-0.64	2.72 🔴	-0.53	2.52 🟡	-0.21	-0.61 🟡	-0.35
LNW	3.22 🟡	0.37	3.31 🟡	0.43	3.36 🟡	0.40	-0.31 🟡	0.21
LNE & EM	3.11 🟡	-0.04	3.28 🟡	-0.08	2.96 🟡	-0.47	-0.42 🟡	-0.14
South East	2.58 🔴	-0.56	2.71 🔴	-0.57	2.28 🟡	-0.02	-0.42 🟡	-0.23
Scotland	3.22 🟡	0.42	3.78 🟢	0.55	3.30 🟡	0.39	-0.29 🟡	0.14

Key scores – customers on route

TOC/FOC	Mean Scores	% Miles by Route 2015	Overall satisfaction		Route satisfaction		Train Performance		Advocacy	
			2015	2014/2015 +/-	2015	2014/2015 +/-	2015	2014/2015 +/-	2015	2014/2015 +/-
	Overall Route Score	Total	3.38	🟡 0.22	3.45	🟡 0.35	3.24	🟡 0.41	-0.18	🟡 0.11
TOC	Abellio Greater Anglia Ltd	55%	3.14	🟡 0.23	3.43	🟢 0.52	3.00	🟡 0.45	-0.29	🟡 0.07
	CrossCountry	3%	1.75	🟡 -0.25	2.50	🔴 -1.50	2.00	🟡 0.00	-1.00	🟡 0.00
	East Midlands Trains	3%	2.50	🟢 0.50	2.50	🟡 -2.00	2.50	🔴 -1.00	-1.50	🔴 -1.00
	GTR	3%	3.33	🟡 0.33	3.67	🟡 -0.33	2.67	🔴 -0.83	0.00	🟡 -0.25
	London OG	12%	3.75	🟢 0.61	3.50	🟡 -0.21	2.75	🟡 -0.08	0.25	🟡 0.39
	London UG	<1%	3.67	🟢 0.67	2.33	🟡 -0.42	3.67	🟢 1.00	0.00	🟢 0.50
	TfL Rail	5%	3.43	NA	4.71	NA	4.86	NA	1.00	NA
	c2c Rail Ltd	13%	4.00	🟡 0.43	3.17	🟡 -0.40	3.83	🟡 0.40	-0.67	🔴 -0.67
FOC	Colas	<1%	3.75	🟡 -0.25	3.67	🟡 -0.33	3.50	🟡 0.00	0.00	🟡 -0.05
	DB Schenker	1%	3.63	🟡 0.38	3.33	🟡 -0.30	3.75	🟡 0.00	0.00	🟡 0.19
	DirectRail Services	<1%	2.71	🟡 -0.29	4.00	🟢 0.87	2.71	🟡 -0.39	-0.57	🟡 -0.17
	Freightliner Ltd	3%	4.00	🟢 1.50	3.43	🟢 1.10	4.09	🟢 1.34	0.33	🟢 1.46
	Freightliner Heavy Haul	<1%	3.86	🟢 1.06	4.00	🟡 0.00	4.14	🟡 0.39	0.29	🟡 0.09
	GB Railfreight	1%	3.00	🔴 -1.00	3.00	🔴 -0.63	3.20	🟡 -0.36	-0.20	🔴 -0.53
	Devon and Cornwall Railways	<1%	5.00	🟢 1.00	3.00	🔴 -1.50	4.00	🟡 0.00	2.00	🟢 1.50
	West Coast Rail	<1%	3.00	NA	3.00	NA	3.00	NA	-1.00	NA

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	Long term strategic needs	Capability to learn	Cares about passengers/customers	Trusted to improve the railways in Britain
	2015	2014/15 +/-	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
Total mean score	3.92	-0.16	3.02	2.46	3.50	2.96	3.37	2.46	2.97	2.52	2.64	2.74
Route average	3.84	-0.12	3.10	2.46	3.56	2.97	3.41	2.50	2.99	2.51	2.67	2.79
Anglia	4.05	0.30	2.96	2.23	3.68	3.13	3.18	2.98	3.05	2.52	2.43	2.93
Wales	3.49	-0.17	3.26	2.62	3.95	3.08	3.66	2.26	3.10	2.34	2.75	2.94
Wessex	3.89	0.18	3.33	2.71	3.83	3.22	4.12	2.71	3.20	2.53	3.01	2.93
Western	3.80	-0.49	2.93	2.04	3.47	2.50	2.79	2.05	2.64	2.19	2.39	2.42
LNW	3.90	-0.10	3.24	2.72	3.49	3.13	3.56	2.60	3.17	2.75	2.95	3.01
LNE & EM	3.89	-0.12	2.81	2.42	3.41	2.90	3.25	2.33	2.99	2.49	2.50	2.59
South East	3.95	-0.40	3.16	2.28	3.37	2.72	3.29	2.38	2.79	2.61	2.41	2.59
Scotland	3.73	-0.15	3.11	2.65	3.27	3.07	3.41	2.71	2.96	2.67	2.92	2.94

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?

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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	
	2015	2014/15 +/-	2015	2014/15 +/-	2015	2014/15 +/-	2015	2014/15 +/-	2015	2014/15 +/-	2015	2014/15 +/-	2015	2014/15 +/-	2015	2014/15 +/-
Total mean score	3.32	0.06	2.87	0.06	3.22	0.02	3.25	0.13	2.88	0.10	2.80	-0.28	3.25	-0.24	2.46	-0.21
Route average	**3.41**	**0.19**	**2.92**	**0.21**	**3.21**	**0.08**	**3.31**	**0.16**	**2.92**	0.15	**2.77**	-0.38	**3.33**	**-0.02**	**2.58**	**0.00**
Anglia	3.76	0.18	2.82	0.46	3.42	0.68	3.09	0.61	3.20	0.37	3.02	-0.44	3.31	-0.01	2.63	0.39
Wales	3.55	0.65	3.23	0.50	3.12	0.16	4.29	1.02	2.66	-0.07	2.19	-0.83	3.55	0.30	2.69	0.66
Wessex	4.09	0.86	3.47	0.77	4.20	1.31	4.21	0.95	3.65	0.82	3.45	0.53	3.87	0.70	3.16	0.43
Western	2.80	0.05	2.34	-0.42	2.92	-0.48	2.82	-0.42	2.34	-0.25	2.53	-0.44	2.94	-0.19	2.10	-0.64
LNW	3.60	0.24	3.23	0.22	3.25	-0.06	3.14	0.24	2.88	0.19	2.74	-0.34	3.26	-0.50	2.75	-0.16
LNE & EM	3.02	-0.39	3.00	-0.10	2.88	-0.22	3.07	-0.09	3.00	-0.10	2.99	-0.22	3.29	-0.38	2.21	-0.59
South East	2.93	-0.31	2.26	-0.06	3.06	-0.39	3.01	-0.52	2.82	-0.08	2.74	-0.13	3.27	-0.07	2.32	-0.44
Scotland	3.54	0.22	3.03	0.32	2.80	-0.41	2.88	-0.46	2.82	0.32	2.53	-0.14	3.13	-0.05	2.81	0.35

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

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