

Network Rail 2015 Customer Survey Report

Route Report: London North East and East Midlands



Prepared by:

December 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 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)
- 116 customers chose to answer about London North East and East Midlands.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have declined marginally since last year.
- Notable decline in train service performance, and this is now below the overall average.
- In terms of customer service attributes, the majority perform below the national average, most notably, 'being prepared to challenge', 'effective communication' and 'taking ownership.'

Action Areas

1. 'Being customer driven' and 'delivering what it says' have low performance scores, but are both important in driving overall satisfaction.
2. 'Trusted to improve Britain's Railways' is also a key driver to overall satisfaction but performs below average.
3. Train service performance is in decline and should continually be a focus area.
4. Satisfaction with safety has declined since last year and should be monitored.

45% Overall Satisfaction

Overall satisfaction has seen a slight decrease this year (-3% points).

48% Route Satisfaction

Route satisfaction for LNE&EM is in line with the overall average of 46%.

36% Train Service Performance

Train service performance has declined notably since last year (-19% points) and is now slightly behind the overall national average of 39%.

13% Advocacy

Advocacy has dropped by -5% points compared to last year.

Green is an increase of 5% or more, Red is a decrease of 5% or more on 2014

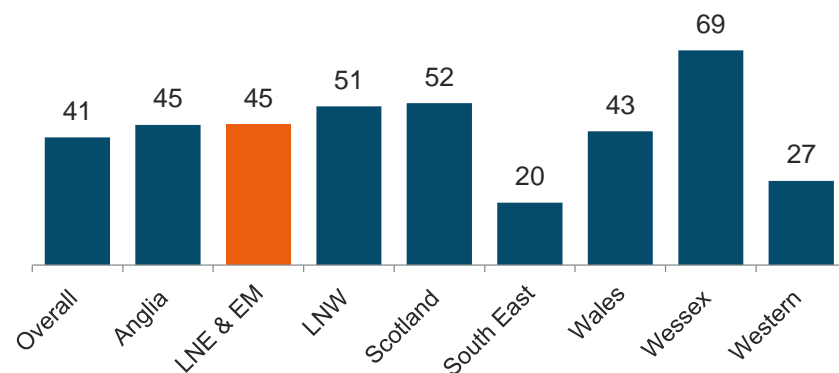
Route compared with overall findings

Key scores

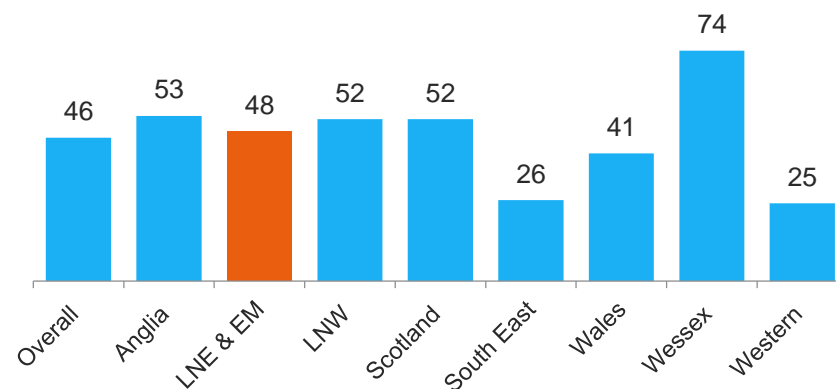
Overall and route satisfaction is broadly in line with the national average, however, both have seen slight dips since last year

Overall satisfaction
% satisfied

% change
since
2014



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 2014

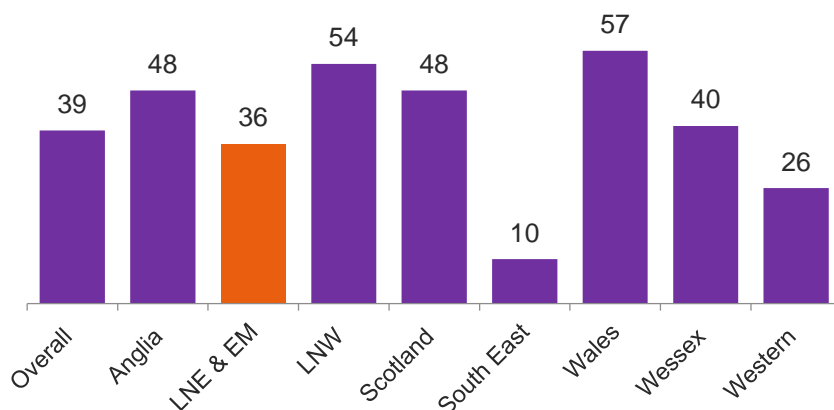
Key scores

Satisfaction with train service performance has seen a substantial drop since last year. Whilst advocacy has also dropped, it is in line with the national average

Satisfaction with train service performance
% satisfied

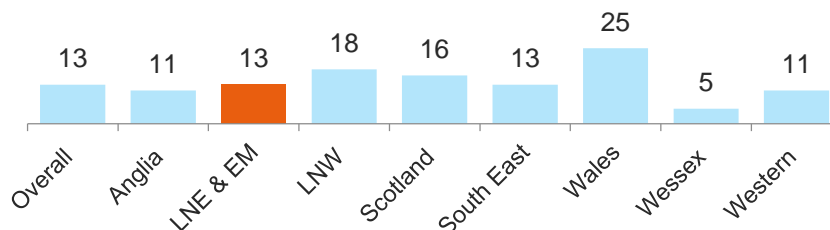
% change since 2014

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



Advocacy
% would speak highly

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



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

Customer service attributes satisfaction

LNE&EM performs below average on the majority of customer service attributes. Key issues seem to be poor communication and a lack of accountability

Overall versus Route: % satisfied

	Overall	LNE & EM	Gap*
Works collaboratively	53	52	-1
Prepared to challenge	53	47	-6
Effective communication	42	35	-7
Focus on long term strategic needs	33	38	+5
Takes ownership	37	29	-8
Learns and applies lessons learnt	21	18	-3
Customer driven	19	17	-2
Delivers what it says	22	21	-1
Cares about rail passengers	22	21	-1
Can be trusted to improve Britain's railways	27	26	-1

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

LNE&EM perform below average on the majority of activity areas, most notably route operations, franchised stations and depots and enhancement projects

Overall versus Route: % satisfied

	Overall	LNE & EM	Gap*
Route operations	42	27	-15
Strategic Route planning	32	36	+4
Managed stations	31	30	-1
Franchised stations and depots	26	16	-10
Delivery of enhancements projects	21	12	-9
Timetable planning	24	26	+2
Infrastructure maintenance and renewals	26	24	-2
Access planning	22	25	+3

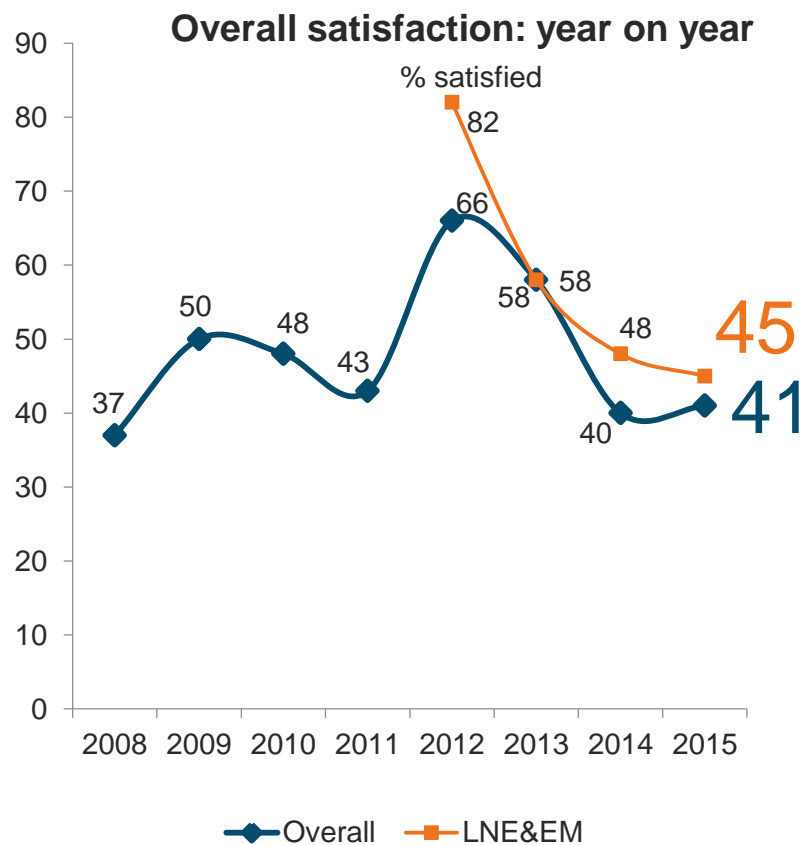
Q21. How satisfied or dissatisfied are you with Network Rail performance with respect to...?

* 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

Whilst above national average, overall satisfaction for LNE&EM customers is still in decline.



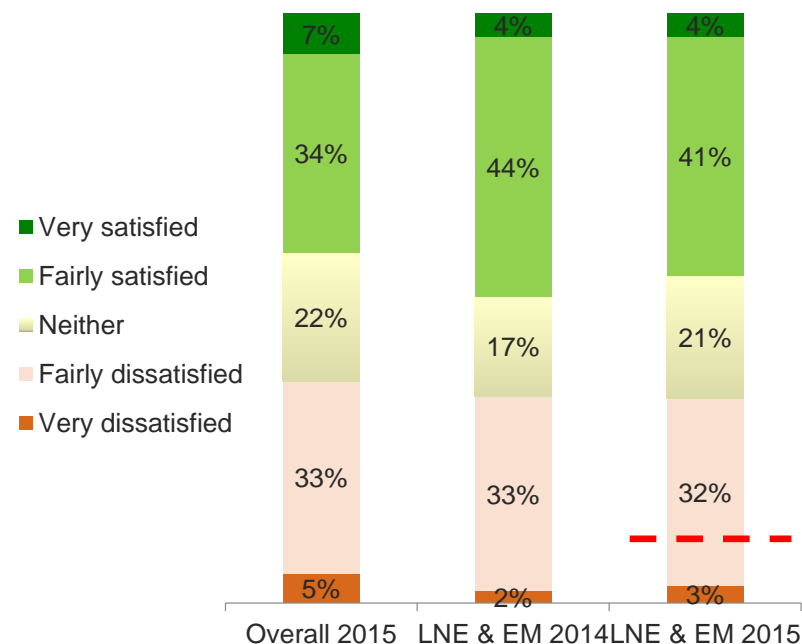
Q1. Taking into account all of your experiences with Network Rail during the last 12 months as a whole, how satisfied or dissatisfied are you with Network Rail?

LNE & EM overall satisfaction:

response breakdown

compared with previous year

Mean = 3.05 Mean = 3.15 Mean = 3.11



NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL

Reasons for overall satisfaction/dissatisfaction

45%

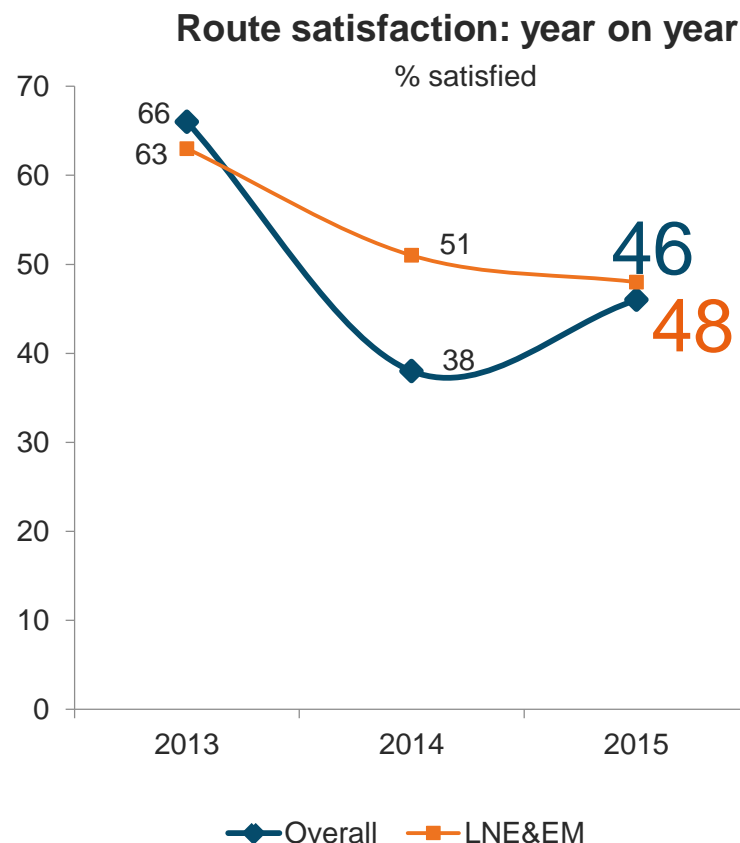
of LNE&EM customers claim to be satisfied.
The key reasons are **collaborative working**
and a **supportive route team**

35%

of LNE&EM customers claim to be dissatisfied.
The key reasons are **lack of continuity with**
NR representatives and **operational**
performance

Route satisfaction

Route satisfaction is in line with the national average, however it has declined slightly since last year with a lower proportion of those 'very satisfied'.



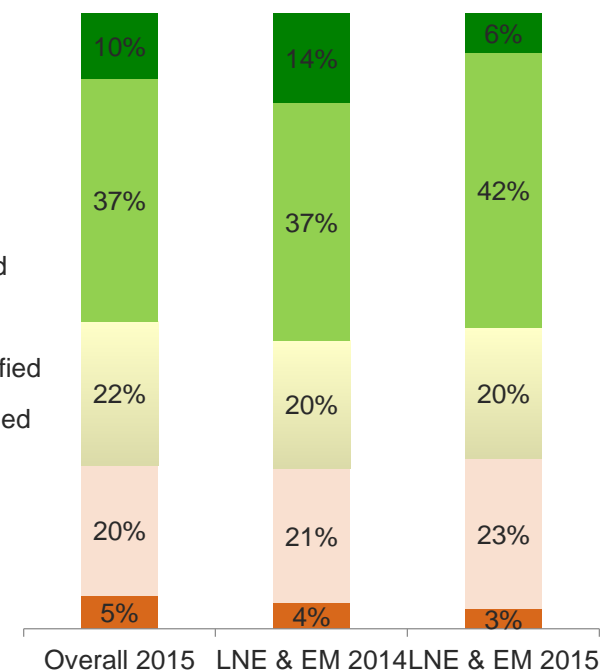
LNE&EM route satisfaction:

response breakdown

compared with previous year

Mean = 3.30 Mean = 3.36 Mean = 3.28

- 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

48%

of LNE&EM customers claim to be satisfied.
The key reasons are **good communication with the route team and collaborative working**

26%

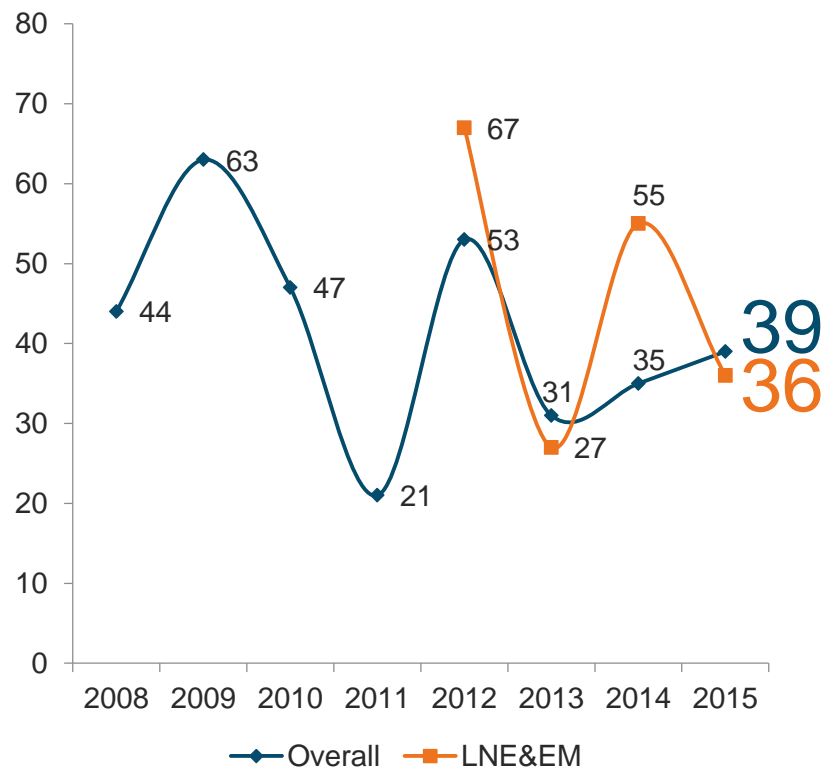
of LNE&EM customers claim to be dissatisfied.
The key reasons are **slow decision making process, poor response to issues**

Overall train service performance

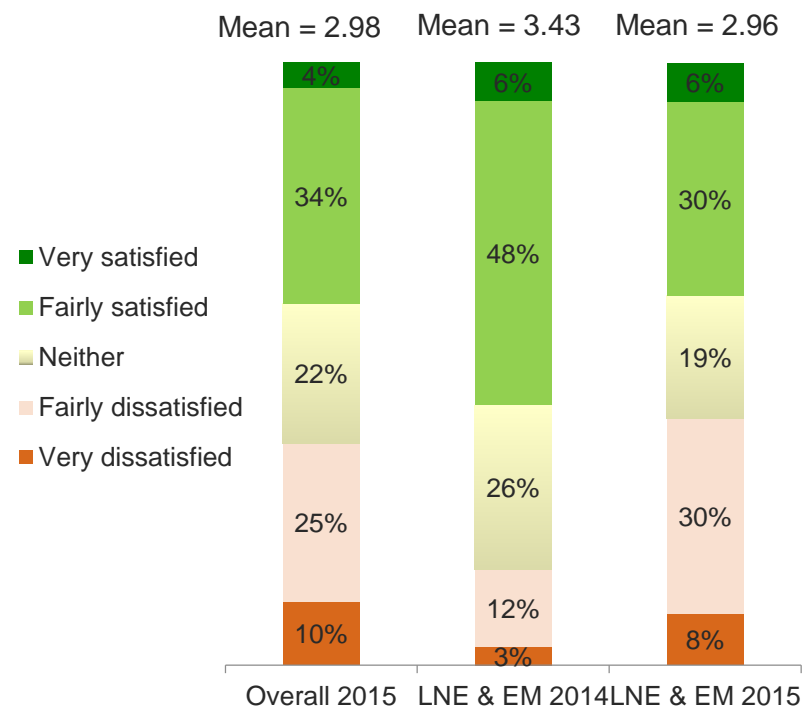
Train service performance has declined 19%pts this year and is now slightly below overall national average.

Satisfaction with train service performance:

year on year
% satisfied



Anglia 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

Customer perspective on train service performance

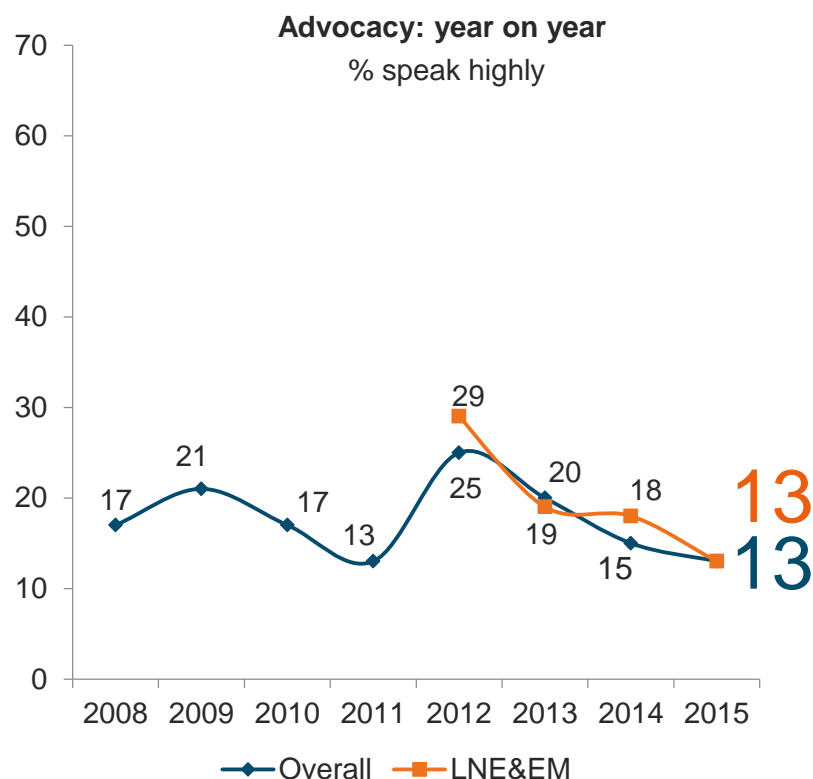
LNE&EM customers believe Network Rail **performs well** on train service performance for the following key reasons:
effective communication, supportive team

LNE&EM customers believe Network Rail **needs to improve** on train service performance for the following key reasons:
delays and poor planning, lack of customer focus

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*

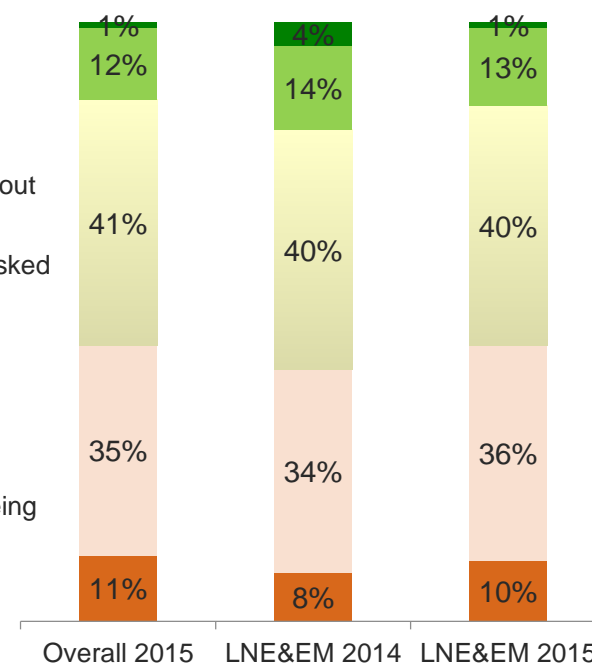
Advocacy has dropped by 5%pts this year and is now in line with the overall national average.



Anglia advocacy - response breakdown compared with previous year

Mean = -0.43 Mean = -0.28 Mean = -0.42

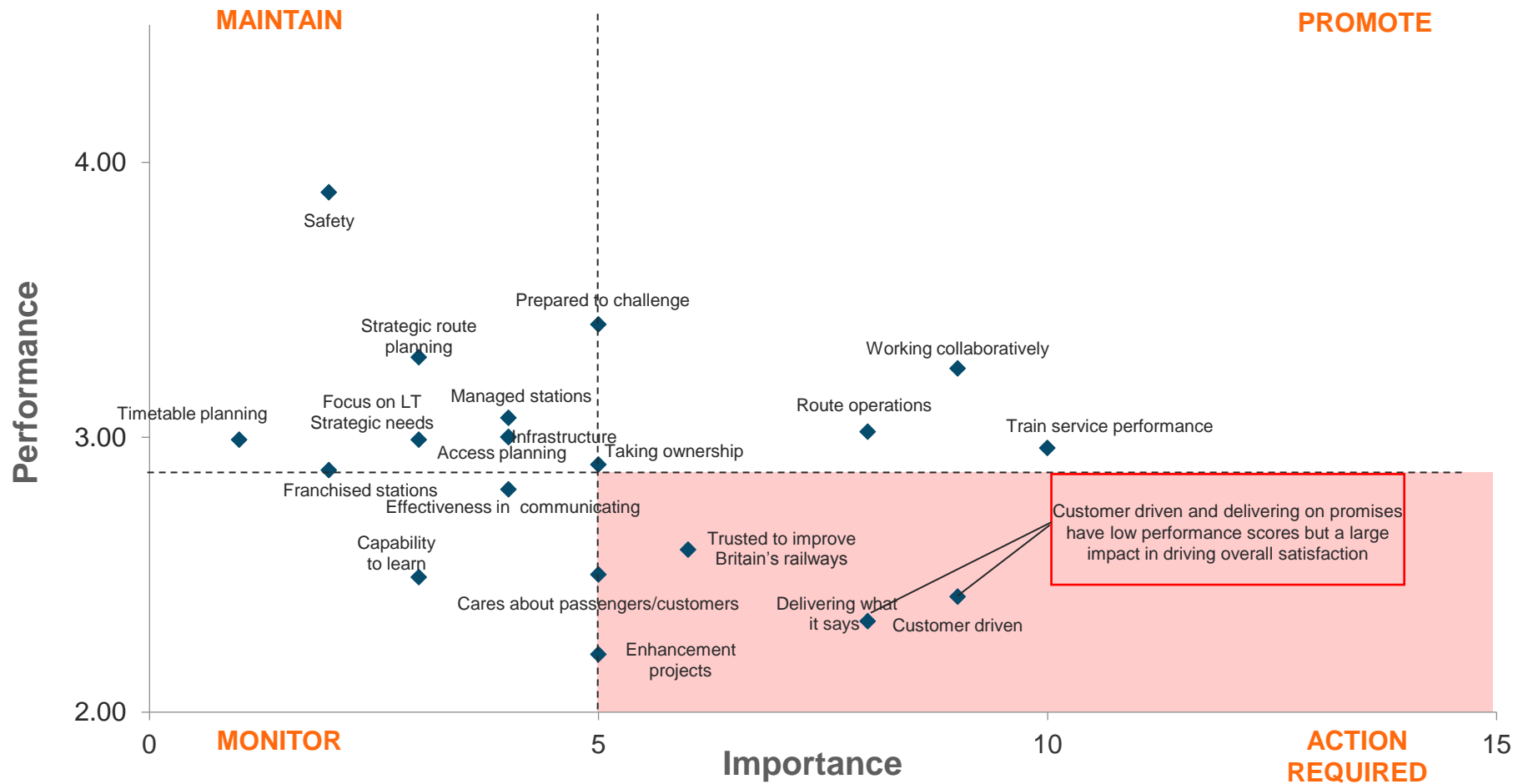
- Speak highly without being asked
- Speak highly, if asked
- Neutral
- Critical if asked
- Critical without being asked



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

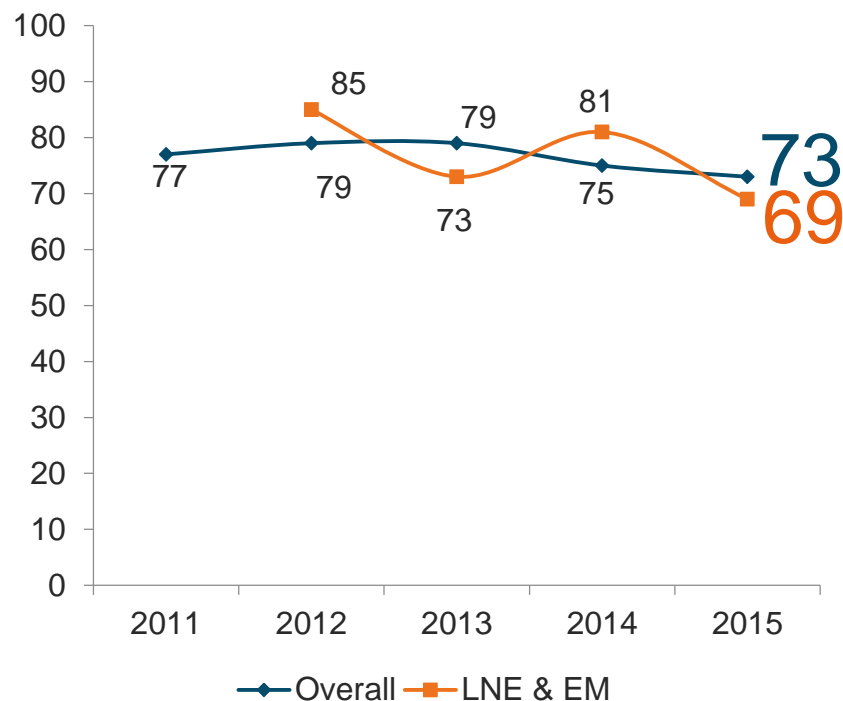
Drivers of satisfaction against route performance: LNE&EM



Satisfaction with safety

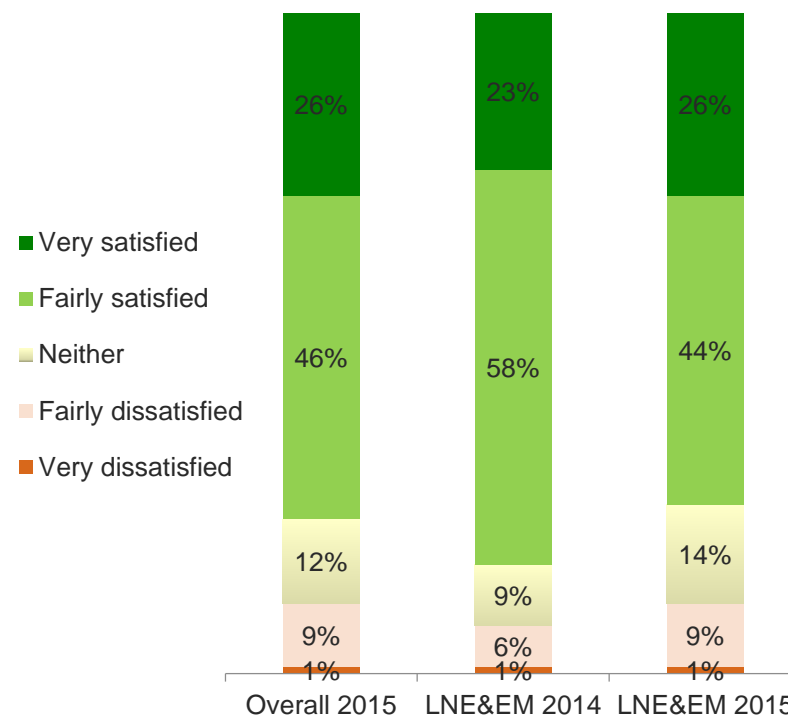
Satisfaction with safety has dropped substantially by 12%pts this year and is LNE&EM is no longer performing above average in this area.

**Satisfaction with safety:
year on year
% satisfied**



**Anglia satisfaction with safety - response
breakdown compared with previous year**

Mean = 3.92 Mean = 4.01 Mean = 3.89



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

69%

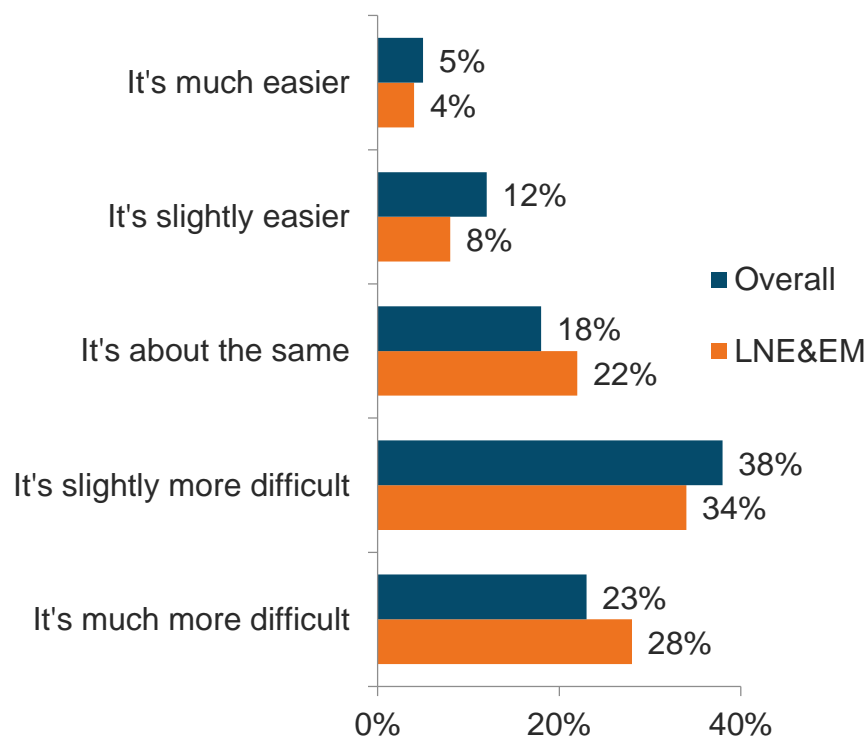
of LNE/EM customers claim to be satisfied with safety. The key reasons are **an embedded safety culture and a consistent focus on safety**

10%

of LNE/EM customers claim to be dissatisfied with safety. The key reasons are **lack of progress and preventative measures, an increase in safety incidents**

Working with Network Rail compared to other organisations

LNE&EM customers find it more difficult to work with Network Rail, generally due to slow decision making and uncertainty of who to contact.















































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		
	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	3.11	 -0.04	3.28	 -0.08	2.96	 -0.47	-0.42	 -0.14
TOC	CrossCountry	9%	1.75	 -0.92	3.00	 -0.33	2.33	 -0.67	-1.25	 -0.92
	DB Regio T&W	2%	3.00	 -1.67	4.00	 -0.33	4.00	 -0.33	0.00	 -0.67
	East Coast	17%	3.38	 0.00	3.38	 -0.50	3.50	 -0.25	-0.38	 -0.51
	East Midlands Trains	16%	2.59	 0.01	2.88	 0.30	2.88	 -0.29	-0.82	 -0.32
	GTR	16%	3.29	 0.43	3.57	 0.00	2.43	 -0.74	0.00	 0.14
	Grand Central	2%	3.67	 -0.13	4.00	 0.60	3.67	 -0.13	0.33	 0.53
	First Hull Trains	1%	3.00	 0.00	2.00	 -0.50	4.00	 0.00	-1.00	 0.50
	London UG	<1%	4.00	 0.00	1.00	 -1.00	4.00	 1.00	0.00	 0.00
	Northern Rail	20%	2.91	 -0.52	3.09	 -0.34	2.36	 -1.21	-0.64	 -0.07
	NYMR	<1%	4.00	 0.00	4.00	 0.00	3.50	 -0.50	-0.50	 0.50
	Transpennine Express	8%	2.42	 -0.58	3.08	 -0.03	3.09	 0.46	-1.25	 -0.81
	Caledonian Sleeper	<1%	3.33	NA	3.00	NA	2.33	NA	-1.00	NA
FOC	Colas	<1%	3.75	 -0.25	3.50	 -0.50	3.50	 0.00	0.00	 -0.50
	DB Schenker	4%	3.63	 0.38	3.80	 0.88	3.75	 0.00	0.00	 0.19
	DirectRail Services	<1%	2.71	 -0.29	3.33	 -0.24	2.71	 -0.39	-0.57	 -0.17
	Freightliner Ltd	1%	4.00	 1.50	3.57	 0.07	4.09	 1.34	0.33	 1.46
	Freightliner Heavy Haul	1%	3.86	 1.06	4.00	 -0.25	4.14	 0.39	0.29	 0.09
	GB Railfreight	2%	3.00	 -1.00	3.50	 -0.06	3.20	 -0.36	-0.20	 -0.53
	DCR	<1%	5.00	 1.00	5.00	 2.50	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?

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	
	2014/15		2014/15		2014/15		2014/15		2014/15		2014/15		2014/15		2014/15	
	2015	+/-	2015	+/-	2015	+/-	2015	+/-	2015	+/-	2015	+/-	2015	+/-	2015	+/-
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...?