


Network Rail 2015 Customer Survey Report

Route Report: London North West

Prepared by: 

The GfK logo is a square with a gradient from orange to red, containing the letters "GfK" in white.

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)
- 133 customers chose to answer about London North West.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have improved since last year.
- LNW is one of the strongest performing routes for train service performance.
- Performance is relatively strong across most customer service attributes and above the national average for the majority.
- Satisfaction with safety is broadly in line with last year, however remains below the national average.

Action Areas

1. 'Being more customer driven' is relatively weak but has a large impact in driving overall satisfaction.
2. Despite the increase, train service performance should still continually be improved.
3. Timetable and access planning are also areas to address which have dropped in satisfaction since 2014.
4. Review safety issues.

51% Overall Satisfaction

Overall satisfaction has seen a notable increase this year (+15% points)

52% Route Satisfaction

Route satisfaction is relatively high for London North West compared to all other routes, and compared to the national average of 46%

54% Train Service Performance

Train service performance has increased notably since last year (+13% points) and is notably higher the overall national average of 39%.

18% Advocacy

Advocacy is 5%pts higher than the overall national average.

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

Route compared with overall findings

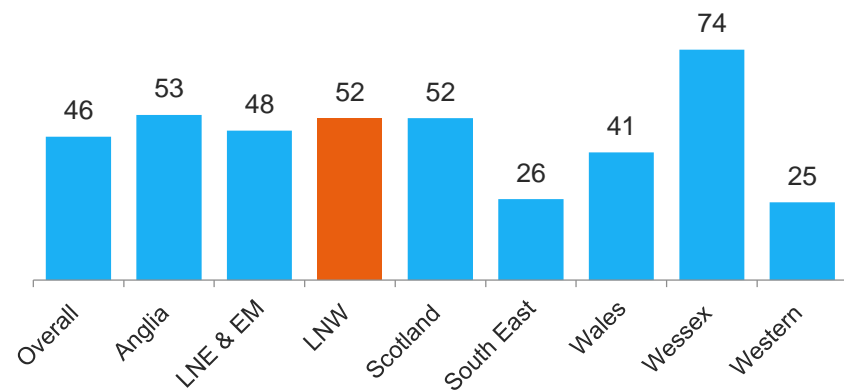
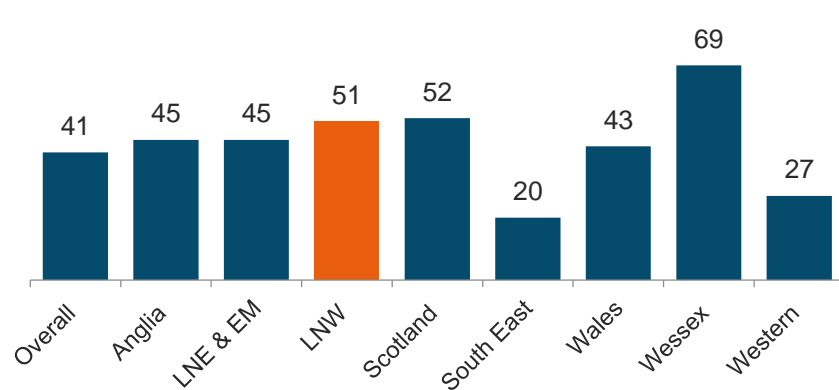
Key scores

Both overall and route satisfaction for LNW are above national average, with considerable increases since 2014

Overall satisfaction
% satisfied

Route satisfaction
% satisfied

% change since 2014



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

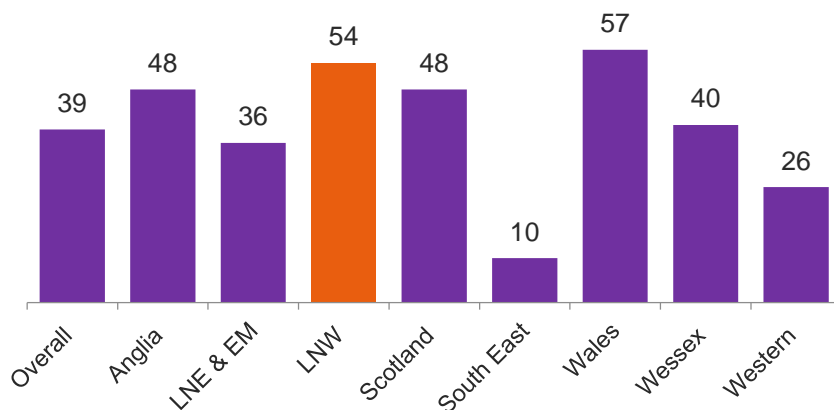
Key scores

Train service performance has seen an increase of 13%pts since 2014. Advocacy has remained stable and is above national average

Satisfaction with train service performance
% satisfied

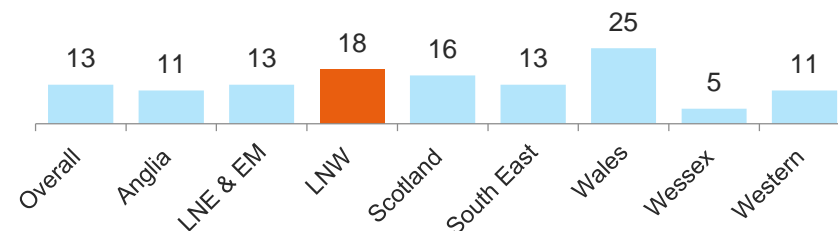
% change since 2014

+4	+18	-19	+13	+17	-8	+41	-6	0
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Advocacy
% would speak highly

-2	3	-5	+1	+5	-4	+14	-13	-1
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Green is an increase of 5% or more, Red is a decrease of 5% or more on 2013

Customer service attributes satisfaction

LNW performance is higher than national average for the majority of attributes. Delivering what it says is the lowest score attribute, generally due to inability to meet deadlines

Overall versus Route: % satisfied

	Overall	London North West	Gap*
Works collaboratively	53	57	+4
Prepared to challenge	53	51	-2
Effective communication	42	51	+9
Focus on long term strategic needs	33	41	+8
Takes ownership	37	46	+9
Learns and applies lessons learnt	21	32	+11
Customer driven	19	27	+8
Delivers what it says	22	22	0
Cares about rail passengers	22	32	+10
Can be trusted to improve Britain's railways	27	32	+5

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

LNW performs relatively well in most activity areas. Access planning is low with only 15% satisfied

Overall versus Route: % satisfied

	Overall	London North West	Gap*
Route operations	42	51	+9
Strategic Route planning	32	30	-2
Managed stations	31	30	-1
Franchised stations and depots	26	32	+6
Delivery of enhancements projects	21	30	+9
Timetable planning	24	20	-4
Infrastructure maintenance and renewals	26	39	+13
Access planning	22	15	-7

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

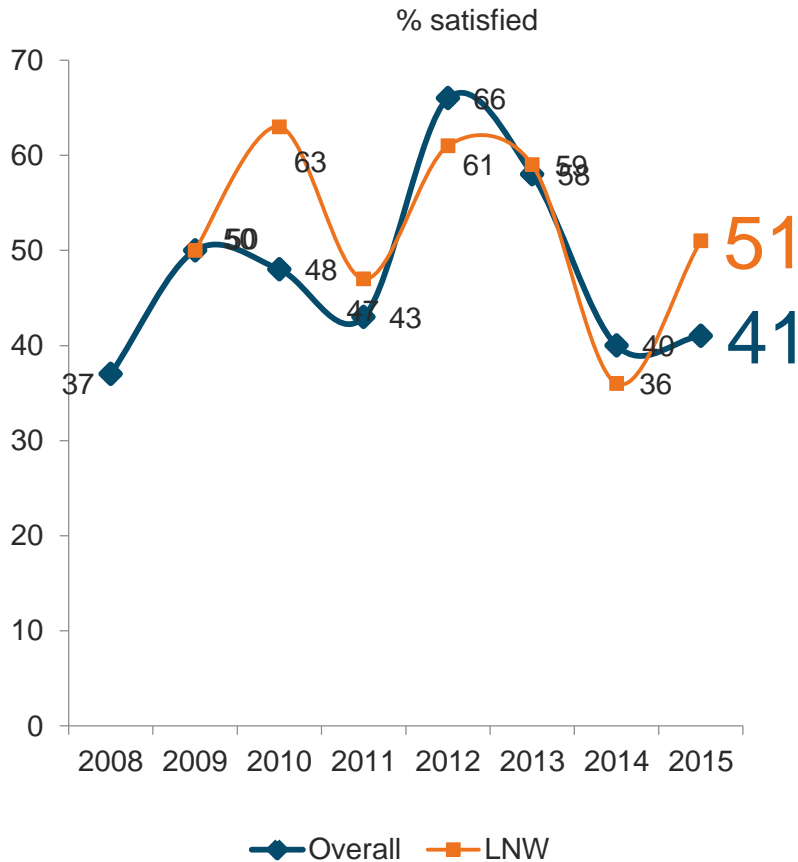
* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

Route key scores

Overall satisfaction

For LNW, overall satisfaction has increased by 15%pts since last year, and is now notably above overall average. The proportion of dissatisfied has decreased by 21%pts

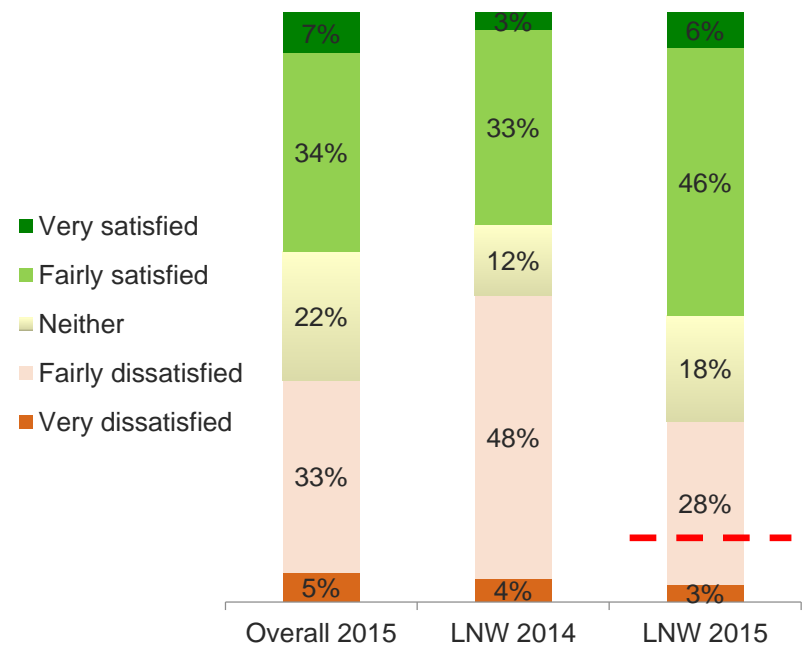
Overall satisfaction: year on year



London North West overall satisfaction:

response breakdown compared with previous year

Mean = 3.05 Mean = 2.85 Mean = 3.22



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

51%

of London North West customers claim to be satisfied.

The key reasons are **strong relationships with NR representatives**

31%

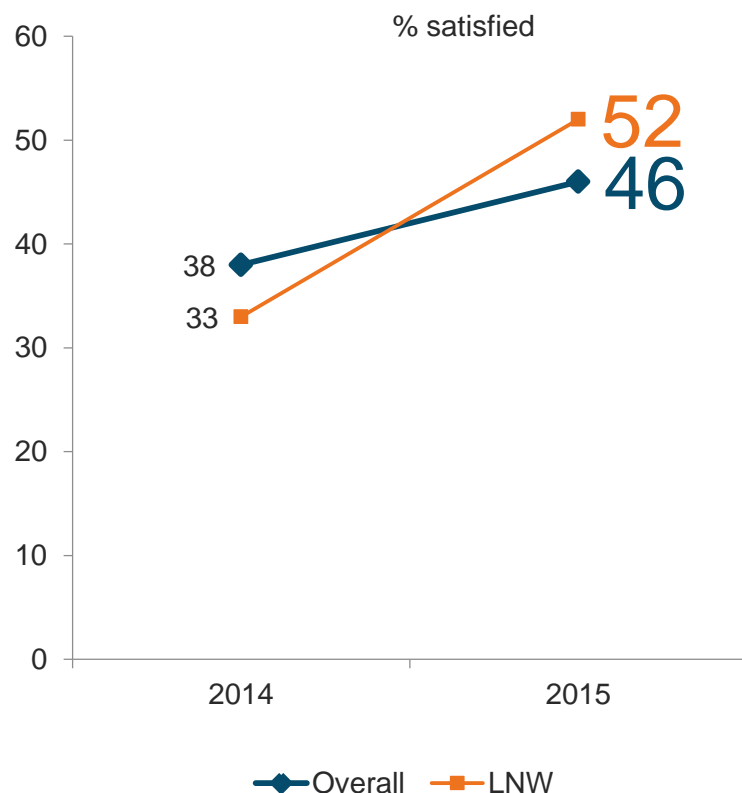
of London North West customers claim to be dissatisfied.

The key reasons are **slow response times and a lack of collaborative working**

Route satisfaction

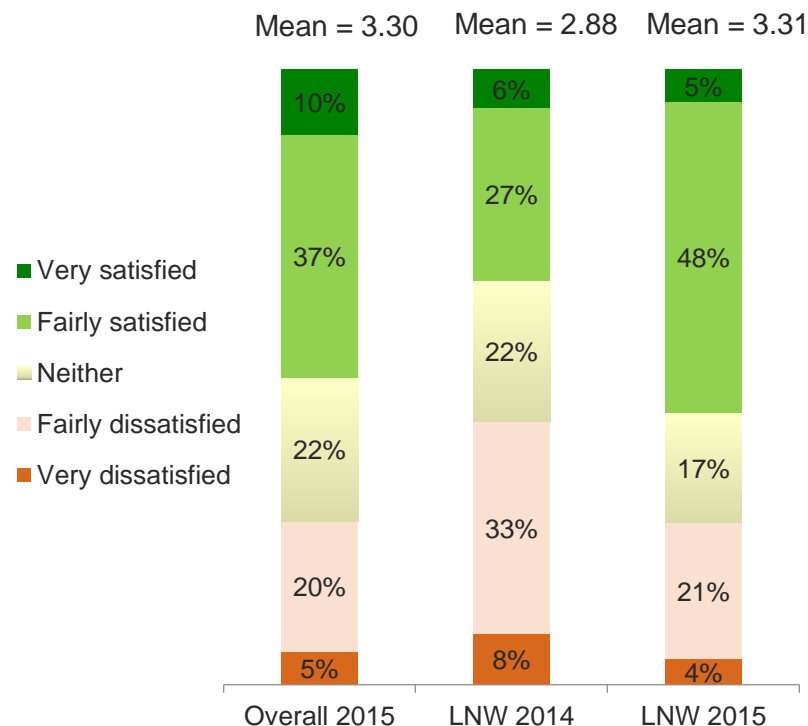
Route satisfaction has increased by 19%pts for LNW this year and is now above overall national average.

Route satisfaction: year on year



London North West route 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

52%

of London North West customers claim to be satisfied.

The key reasons are **transparency, strong relationships with NR representatives**

24%

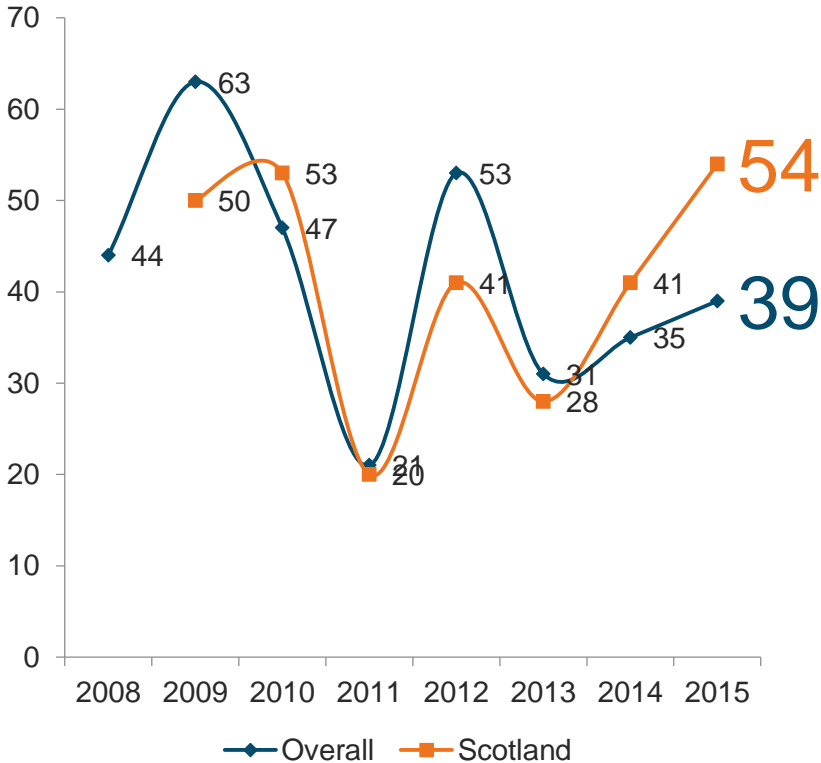
of London North West customers claim to be dissatisfied.

The key reasons are **poor communication, lack of ownership**

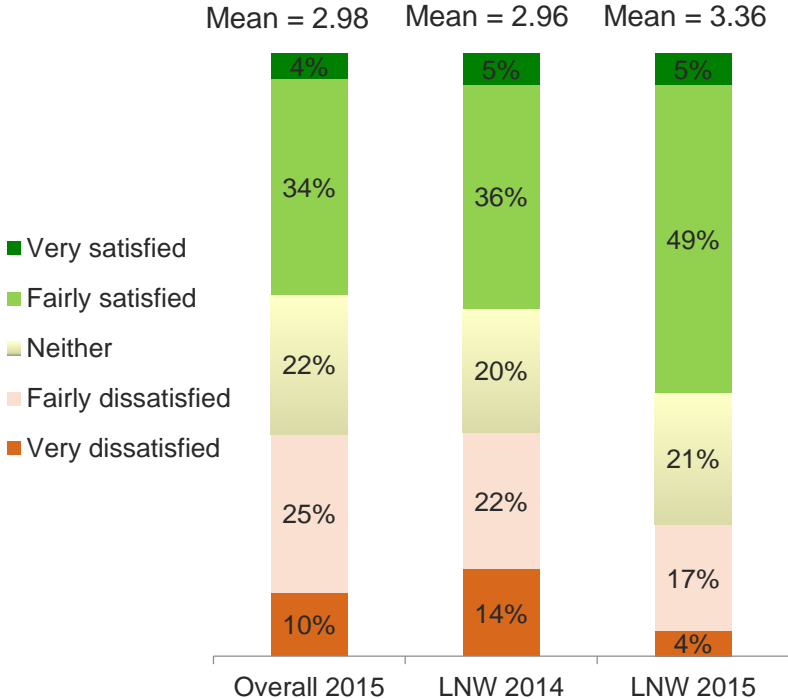
Overall train service performance

Train service performance continues to improve at a steeper rate than the overall national average, with over half of LNW customers satisfied in this area.

Satisfaction with train service performance:
year on year
% satisfied



London North West 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

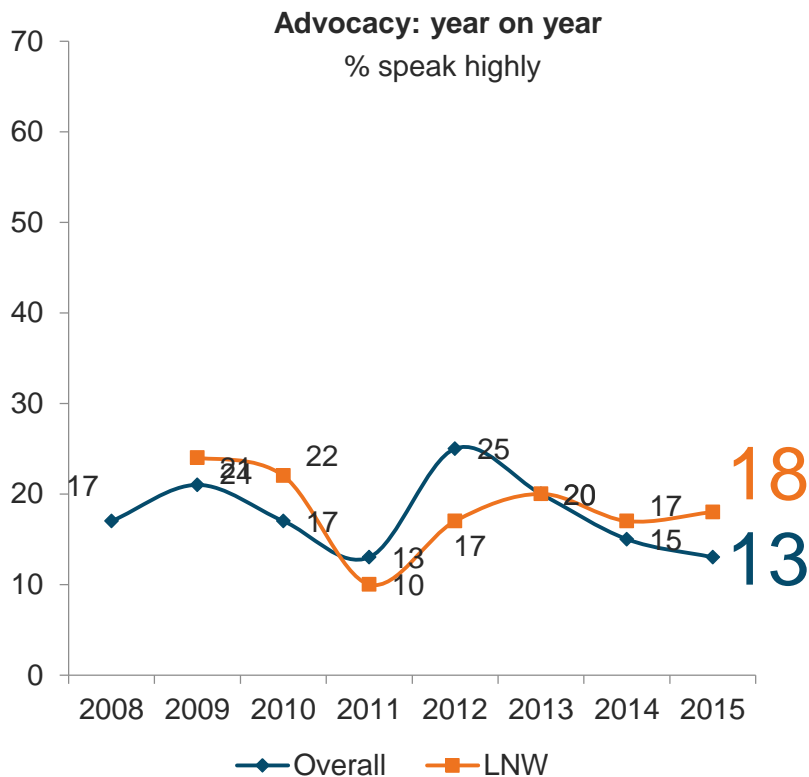
Customer perspective on train service performance

London North West customers believe Network Rail **performs well** on train service performance for the following key reasons: **innovative solutions, supportive team**

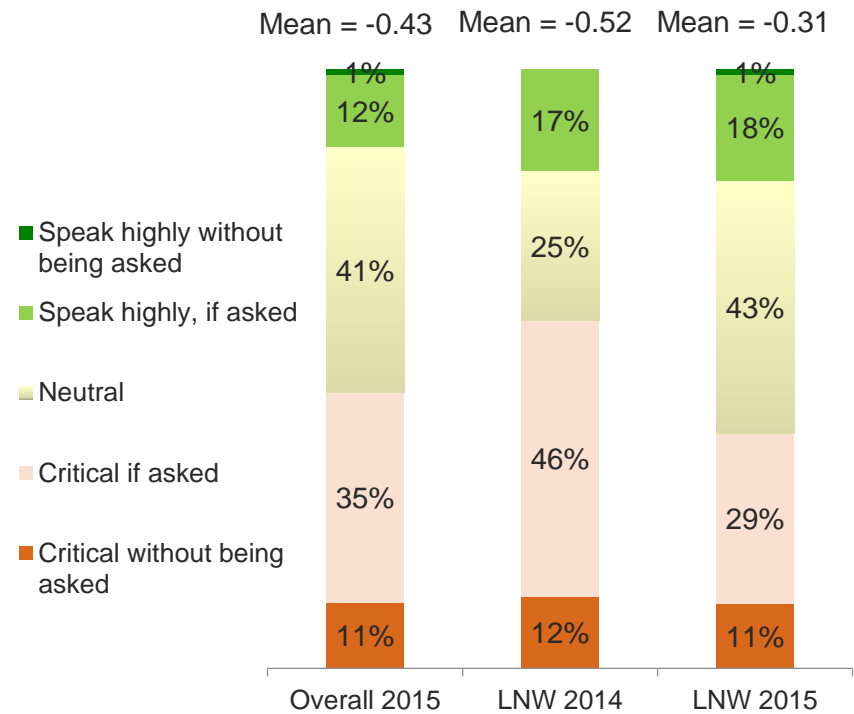
London North West customers believe Network Rail **needs to Improve** on train service performance for the following key reasons: **poor infrastructure reliability, slow issue resolution**

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

Advocacy has remained stable this year and is above overall national average.



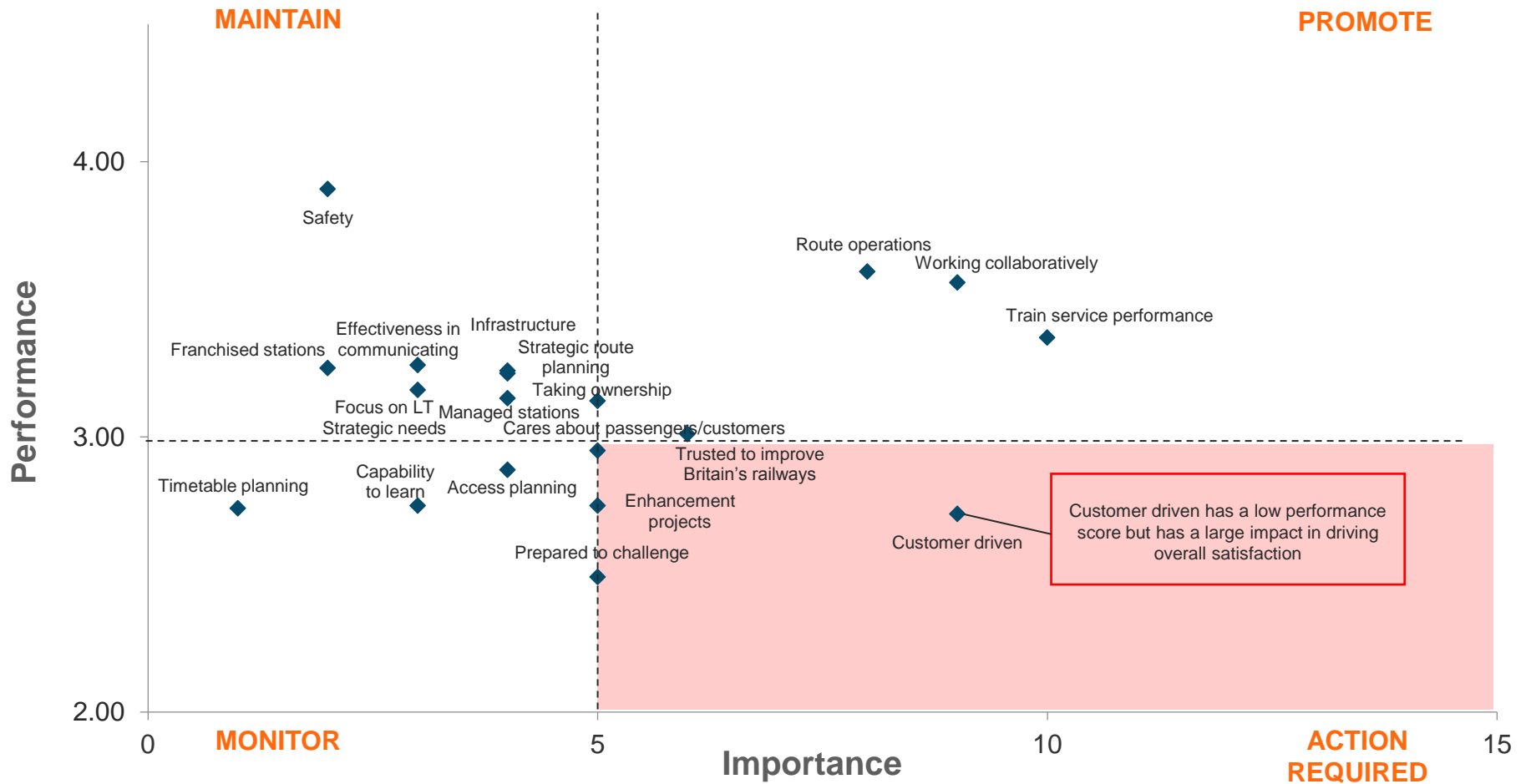
London North West advocacy - response breakdown compared with previous year



Q3. Which of these best describes how you feel about Network Rail as an organisation overall, taking all you know about them into consideration?

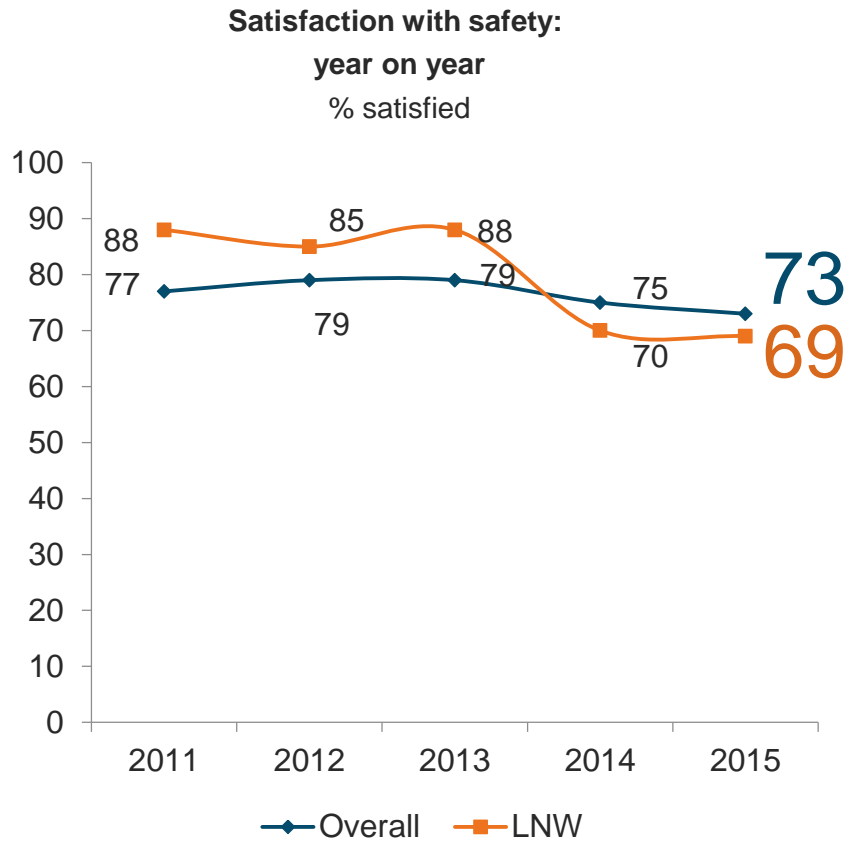
Additional findings

Drivers of satisfaction against route performance: London North West

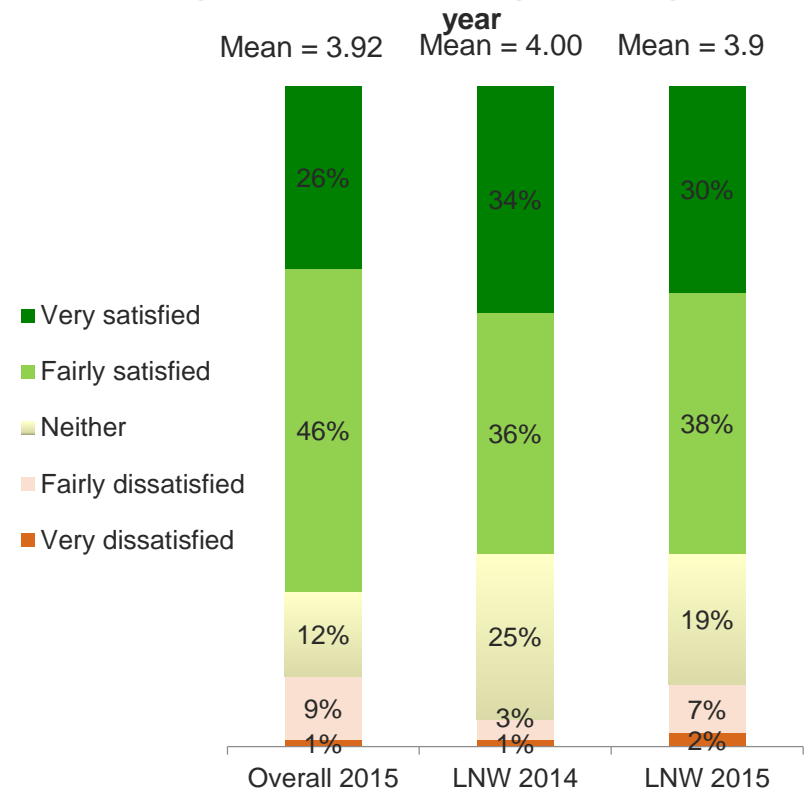


Satisfaction with safety

A slightly lower proportion of LNW customers are very satisfied this year with Network Rail putting safety first.



London North West satisfaction with safety - response breakdown compared with previous



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%

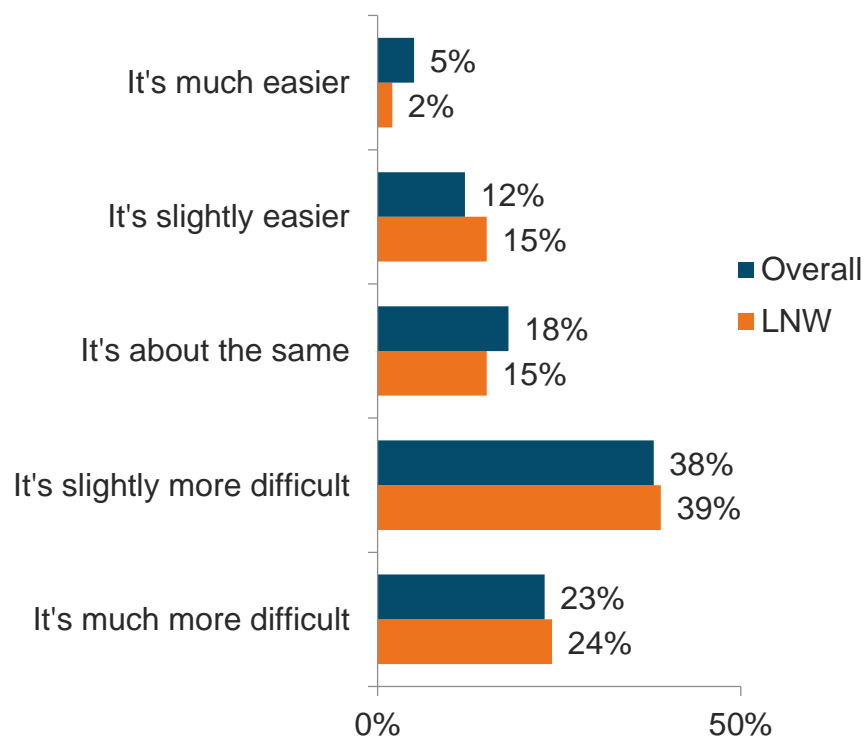
of London North West customers claim to be satisfied with safety. The key reasons are **visibility that safety is a top priority for Network Rail, transparency in discussing safety issues**

9%

of London North West customers claim to be dissatisfied with safety. The key reasons are **station safety risks and (over)complicated procedures**

Working with Network Rail compared to other organisations

















































LNW find it more difficult to work with Network Rail, due to frustrations with the size and bureaucracy of the organisation.



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						
			3.22	0.37	3.31	0.43	3.36	0.40	-0.31	0.21
TOC	Arriva Trains Wales	3%	2.00	-0.83	3.00	0.00	-	N/A	-2.00	-1.33
	Chiltern Railways	7%	4.00	-0.38	4.22	-0.28	4.00	0.00	0.56	-0.19
	CrossCountry	6%	2.00	-0.33	2.44	-0.73	2.63	0.63	-1.11	-0.28
	East Midlands Trains	1%	2.75	0.42	2.00	-0.67	2.75	-0.92	-1.50	-0.83
	GTR	1%	2.00	0.00	3.00	1.00	3	N/A	-1.00	1.00
	London Midland	18%	3.17	0.60	3.08	0.51	3.18	-0.11	-0.50	0.50
	London Overground	1%	3.50	0.50	3.50	0.50	2.50	-0.50	0.00	0.17
	London Underground	2%	3.00	-1.00	3.00	1.00	3.50	0.50	-0.50	-0.50
	Merseyrail	5%	3.42	0.04	3.00	-0.29	3.36	-0.02	-0.42	-0.04
	Northern Rail	16%	2.55	-0.70	3.00	-0.38	2.64	-1.11	-0.64	-0.39
	Transpennine Express	7%	2.30	-0.70	1.90	-0.99	2.89	0.26	-1.30	-0.86
	Virgin Trains	24%	3.58	1.58	3.92	2.09	3.92	2.25	0.00	1.00
Caledonian Sleeper	<1%	3.33	N/A	3.00	N/A	2.33	N/A	-1.00	N/A	
FOC	Colas	<1%	3.75	-0.25	3.67	0.67	3.50	0.00	0.00	-0.50
	DB Schenker	3%	3.63	0.38	3.25	-0.45	3.75	0.00	0.00	0.19
	DirectRail Services	1%	2.71	-0.29	2.00	-1.60	2.71	-0.39	-0.57	-0.17
	Freightliner Ltd	3%	4.00	1.50	3.86	0.86	4.09	1.34	0.33	1.46
	Freightliner Heavy Haul	<1%	3.86	1.06	3.50	-0.50	4.14	0.39	0.29	0.09
	GB Railfreight	1%	3.00	-1.00	3.50	-0.36	3.20	-0.36	-0.20	-0.53
	DCR	<1%	5.00	1.00	4.00	0.50	4.00	0.00	2.00	1.50
West coast Rail	<1%	3.00	N/A	4.00	4.00	3.00	3.00	-1.00	-1.00	

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
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	
	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
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...?