Network Rail 2015 Customer Survey Report

Route Report: Scotland

Prepared by:

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)
- 63 customers chose to answer about Scotland.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have improved considerably since last year.
- Notable increase for train service performance, and above the overall average.
- In terms of customer service attributes, whilst 'caring for rail passengers', 'capability to learn' and 'trust' perform above the average, there are concerns around long term strategic needs and being prepared to challenge.
- Scotland performs well on 'Route operations' and above average for 'delivery of enhancement projects', but below average across most other activity areas.

Action Areas

1. Being more customer driven and delivering what it says have relatively low levels of performance but have a large impact in driving overall satisfaction.
2. Despite the increase, train service performance should still continually be improved.
3. Address issues with safety, which has declined since last year.

52% Overall Satisfaction

Overall satisfaction has seen a significant increase this year (+21% points).

52% Route Satisfaction

Route satisfaction is relatively high for Scotland compared to all other routes, and compared to the national average of 46%.

48% Train Service Performance

Train service performance has increased since last year (+17% points) and is now slightly higher the overall national average of 39%.

16% Advocacy

Advocacy has increased by 5% compared to last year.

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

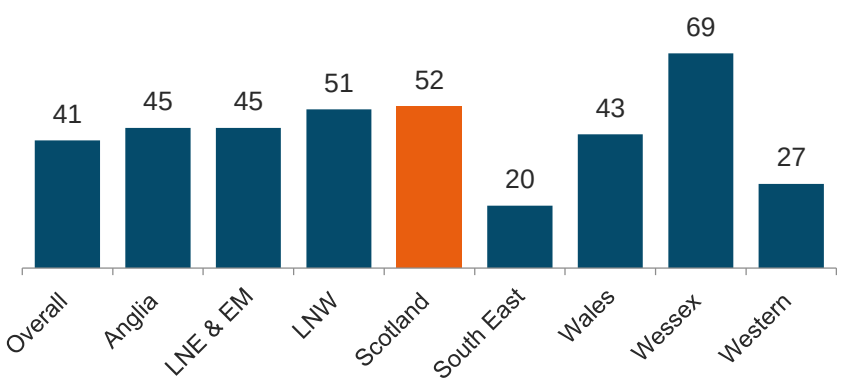
Route compared with overall findings

Key scores

Satisfaction has increased substantially for Scotland customers at both an overall and route level

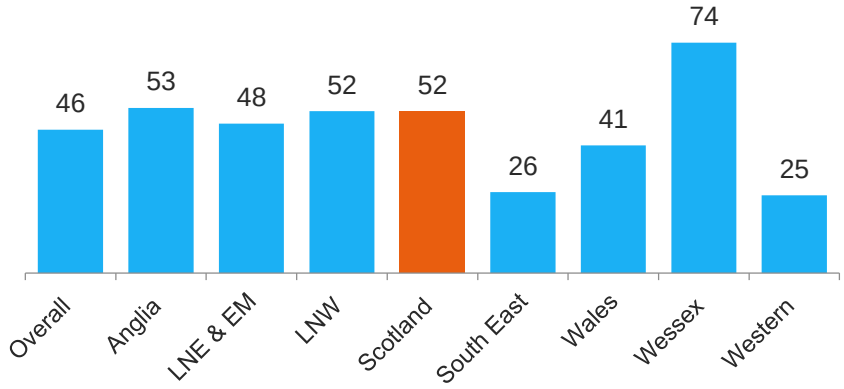
Overall satisfaction
% satisfied

% change since 2014	Overall	Anglia	LNE & EM	LNW	Scotland	South East	Wales	Wessex	Western
	41	45	45	51	52	20	43	69	27
	+1	+13	-3	+15	+21	-26	+4	+22	-19



Route satisfaction
% satisfied

	Overall	Anglia	LNE & EM	LNW	Scotland	South East	Wales	Wessex	Western
	46	53	48	52	52	26	41	74	25
	+8	+29	-3	+19	+11	-21	-2	+49	-18



Overall satisfaction = satisfaction with Network Rail as a whole amongst those operating on each of the routes

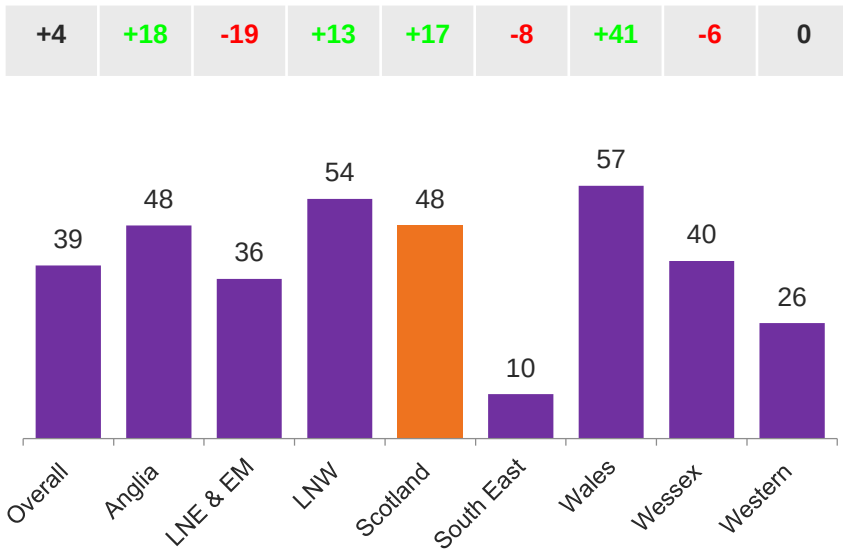
Route satisfaction = satisfaction with each specific route amongst those operating on each of the routes

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

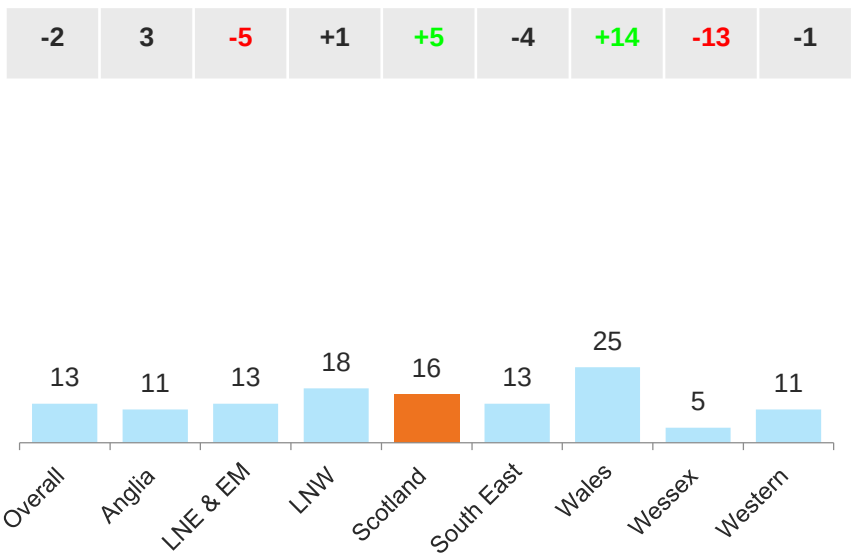
Key scores

Train service performance has improved by 17%pts since last year, with advocacy has also seeing an increase

Satisfaction with train service performance
% satisfied



Advocacy
% would speak highly



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

Customer service attributes satisfaction

The Scotland route performs well for cares about passengers/freight customers and trusted to improve Britain's railways, however lags behind overall average for prepared to challenge you

Overall versus Route: % satisfied

	Overall	Scotland	Gap*
Works collaboratively	53	51	-2
Prepared to challenge	53	40	-13
Effective communication	42	43	+1
Focus on long term strategic needs	33	27	-6
Takes ownership	37	37	0
Learns and applies lessons learnt	21	29	+8
Customer driven	19	22	+3
Delivers what it says	22	22	0
Cares about rail passengers	22	37	+15
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

Scotland performs relatively well for route operations and enhancement projects, but is behind overall average for the majority of activity areas

Overall versus Route: % satisfied

	Overall	Scotland	Gap*
Route operations	42	47	+5
Strategic Route planning	32	27	-5
Managed stations	31	23	-8
Franchised stations and depots	26	7	-19
Delivery of enhancements projects	21	30	+9
Timetable planning	24	11	-13
Infrastructure maintenance and renewals	26	27	+1
Access planning	22	17	-5

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

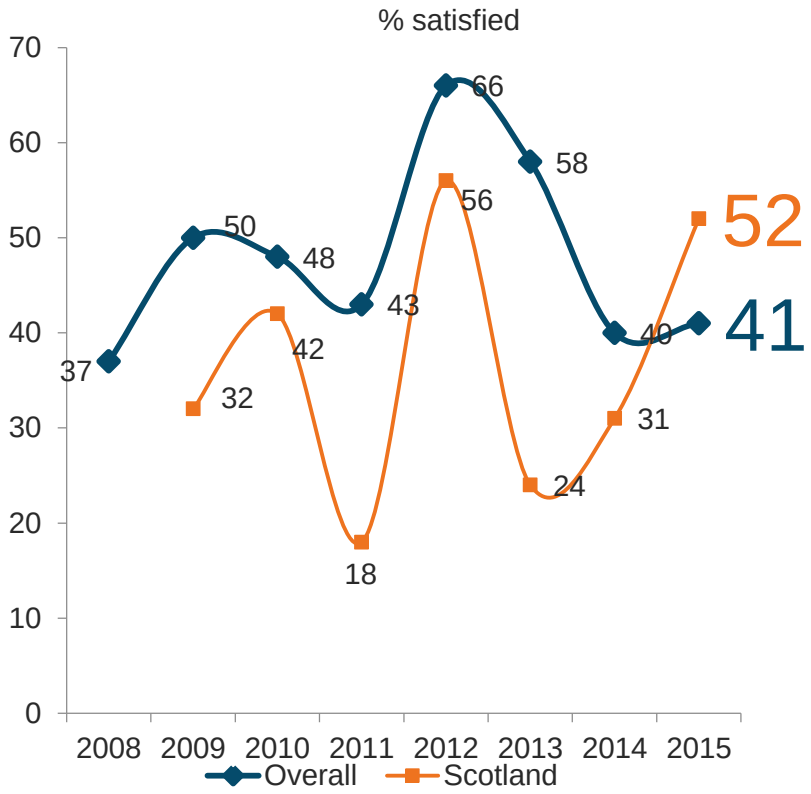
* Gaps of more than 5% are colour coded: green is 5% or more higher, red is 5% or more lower

Route key scores

Overall satisfaction

Overall satisfaction continues to increase amongst Scotland Customers and is now 11%pts above national average

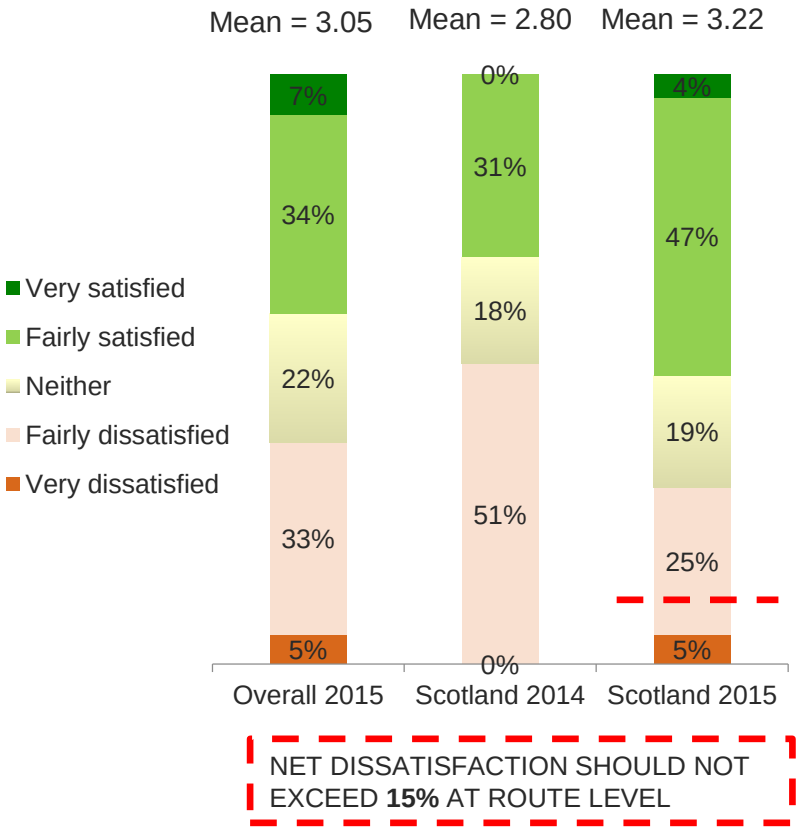
Overall satisfaction: year on year



Scotland overall satisfaction:

response breakdown

compared with previous 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?

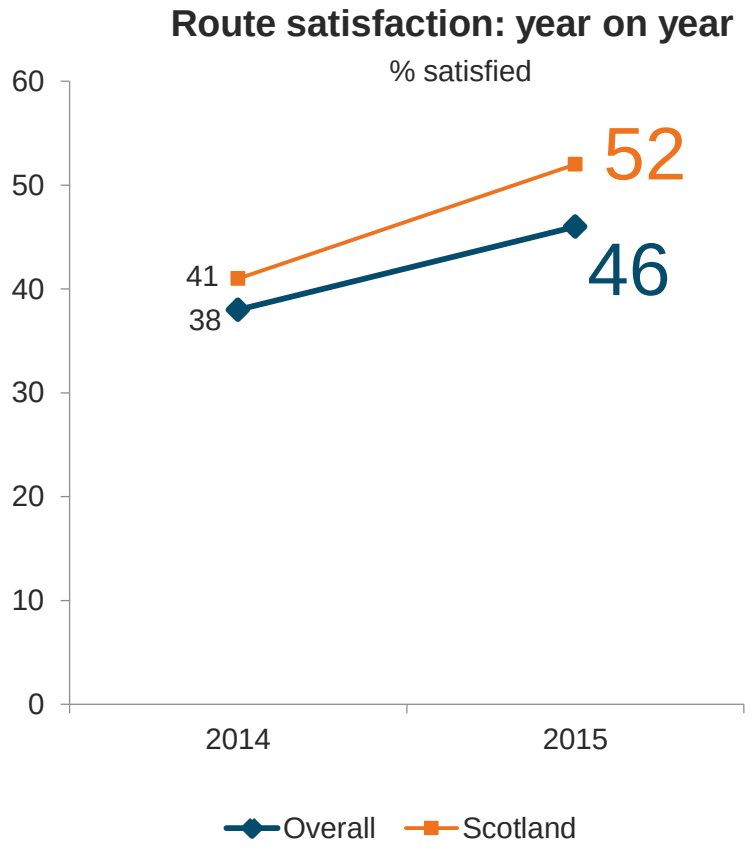
Reasons for overall satisfaction/dissatisfaction

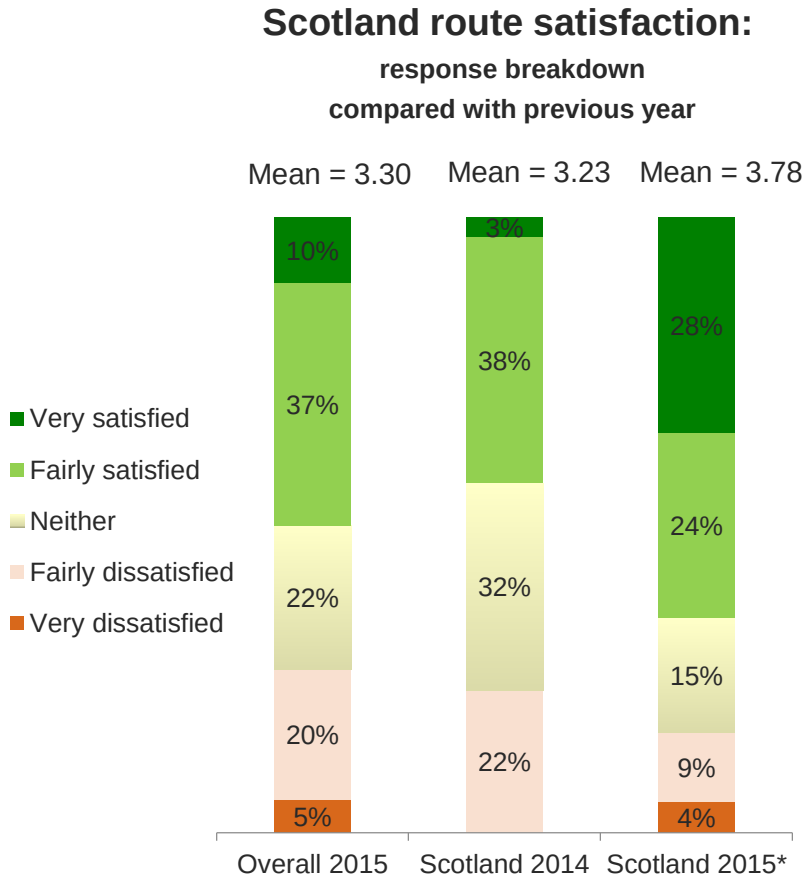
52% of Scotland customers claim to be satisfied. The key reasons are **collaborative working with NR representatives**

29% of Scotland customers claim to be dissatisfied. The key reasons are **small operators not taken seriously, slow response to issues**

Route satisfaction

Satisfaction on the Scotland route has improved by 11%pts this year and has a substantially higher proportion of very satisfied customers





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

**20% answered Don't Know/ Not applicable*

Reasons for route satisfaction/dissatisfaction

52% of Scotland customers claim to be satisfied. The key reasons are **good communication and relationships with the route team**

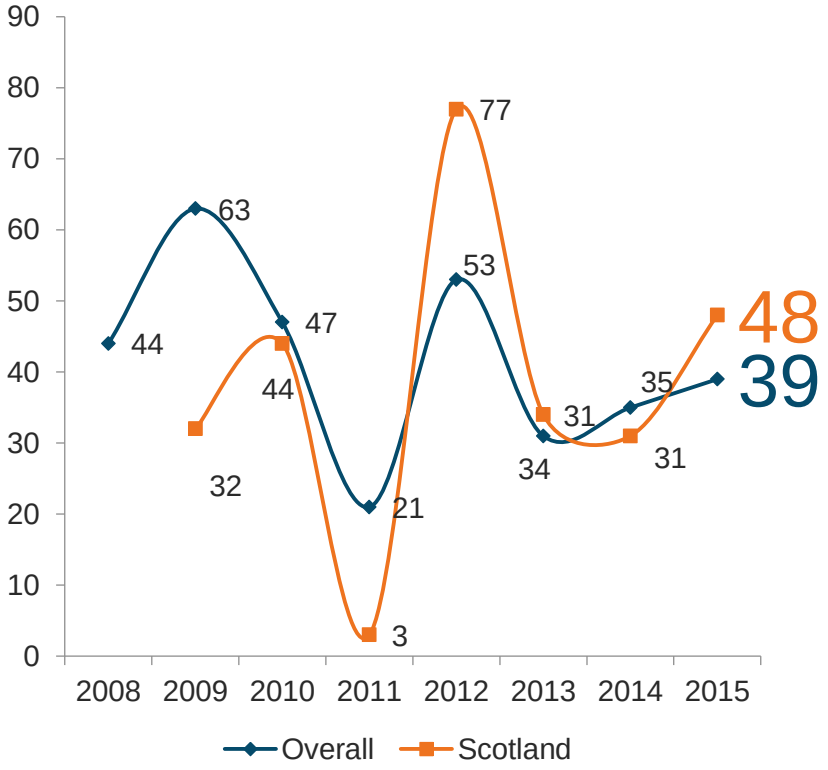
13% of Scotland customers claim to be dissatisfied. The key reasons are **infrequent communication, lack of ownership**

Base: All Scotland respondents (63)

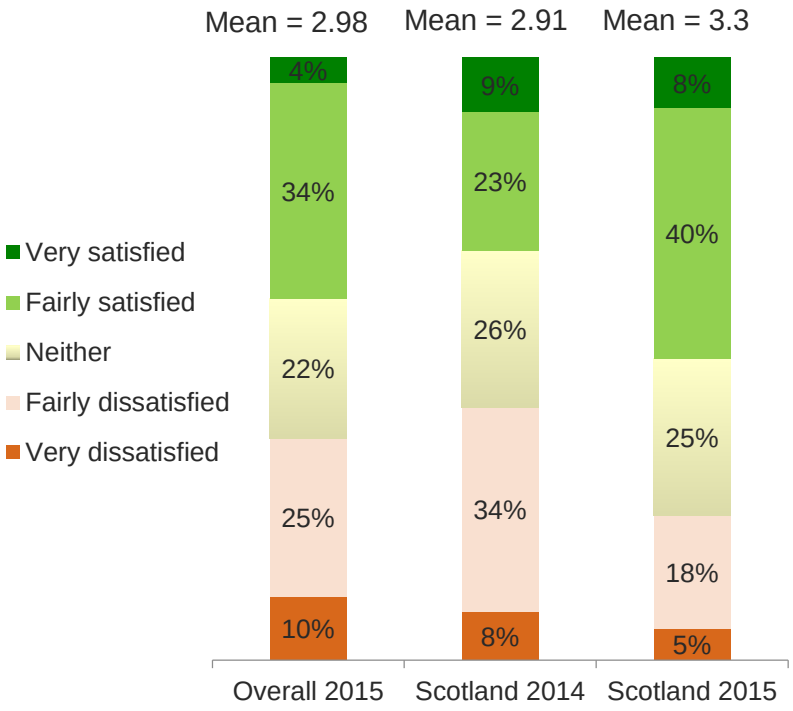
Overall train service performance

Train service performance has improved notably this year and is above national average.

Satisfaction with train service performance: year on year



Scotland 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

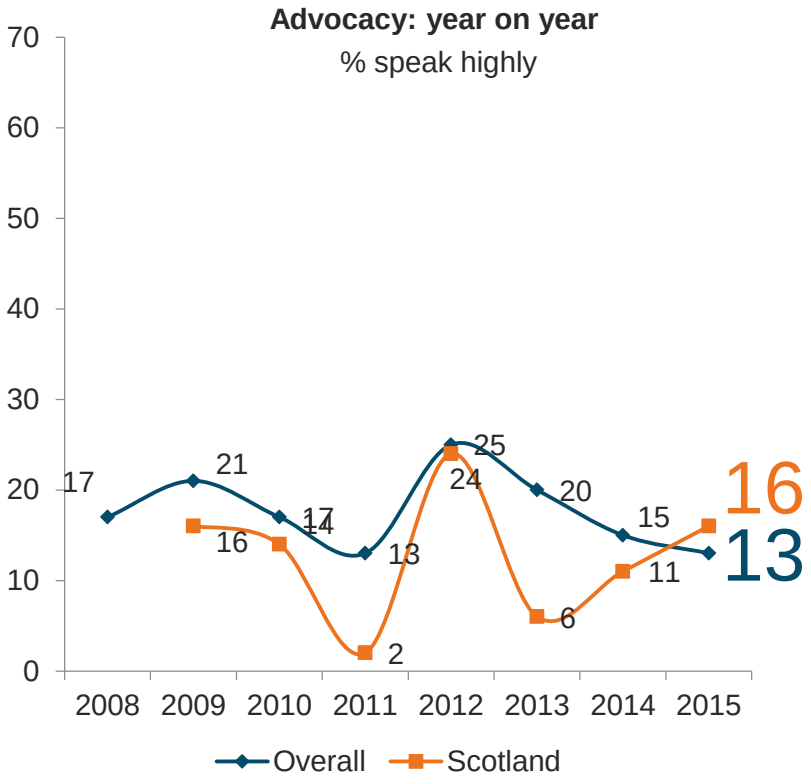
Scotland customers believe Network Rail **performs well** on train service performance for the following key reasons:
confidence in the route team

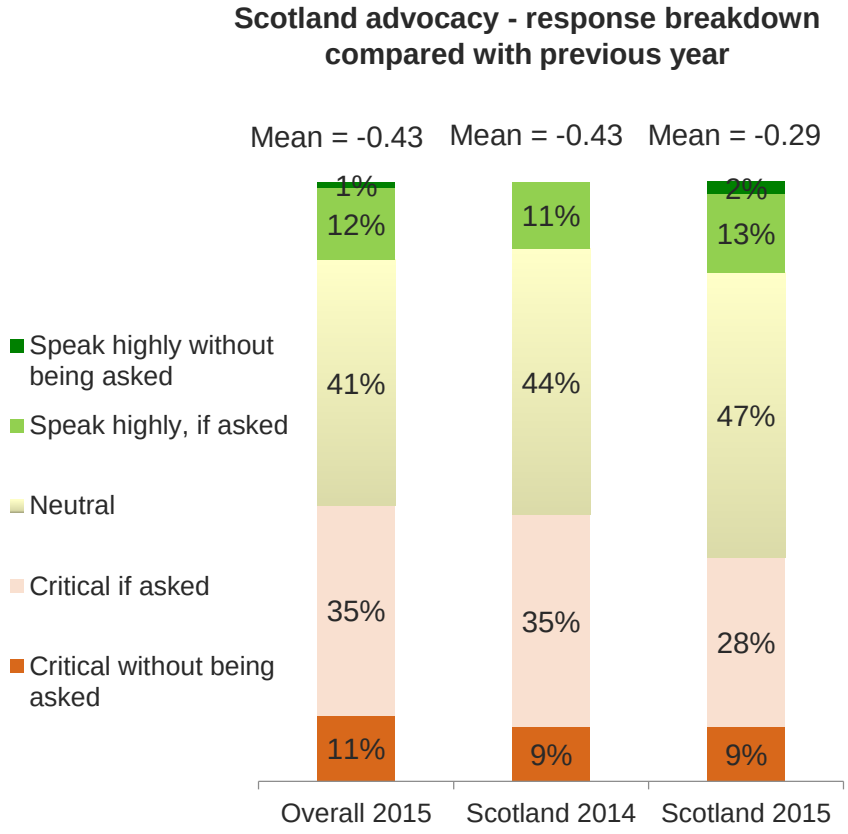
Scotland customers believe Network Rail **needs to improve** on train service performance for the following key reasons:
perception that smaller operators are not seen as important

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 increased by 10%pts since the dip in 2013.

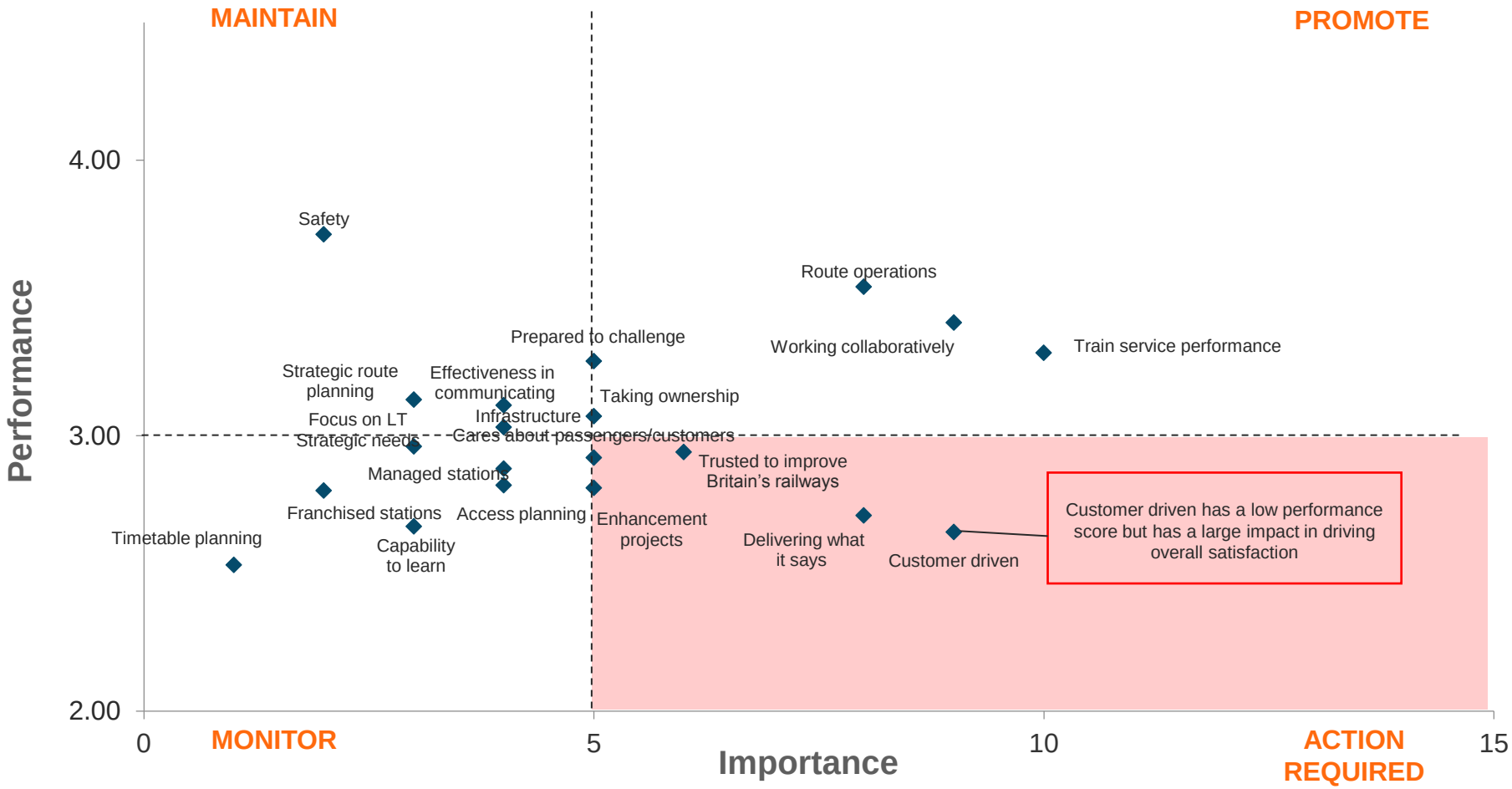




Q3. Which of these best describes how you feel about Network Rail as an organisation overall, taking all you know about them into consideration?

Additional findings

Drivers of satisfaction against route performance: Scotland

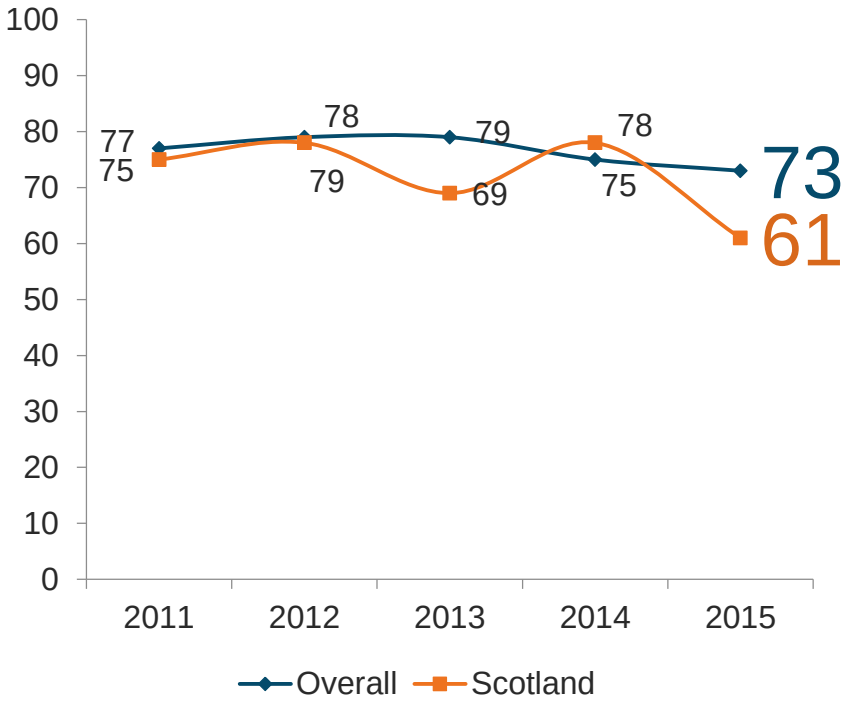


Satisfaction with safety

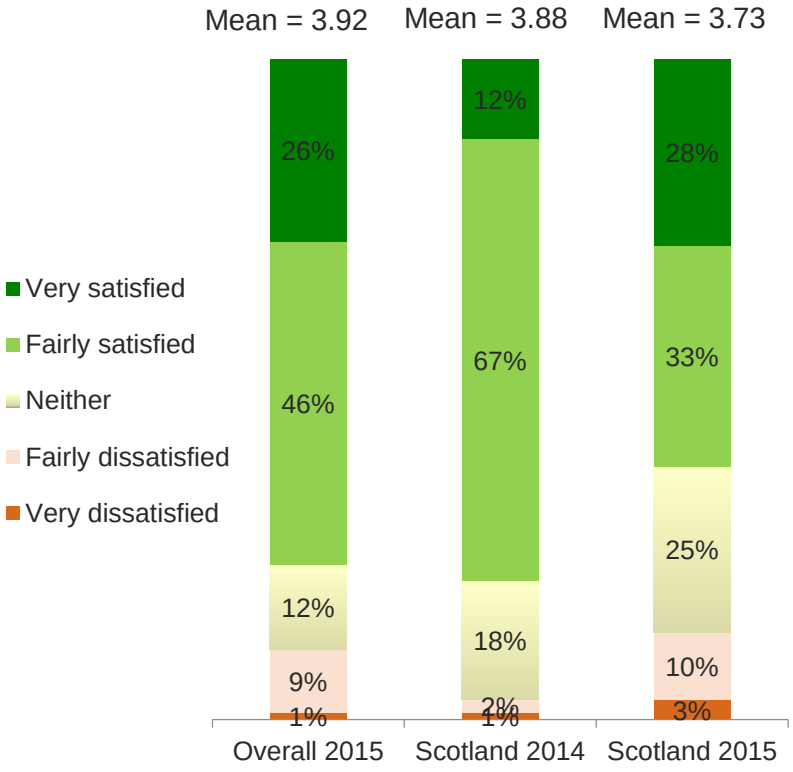
Satisfaction with safety on the Scotland route has steeply declined since 2014 (-16%pts).

Satisfaction with safety: year on year

% satisfied



Scotland 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

61%

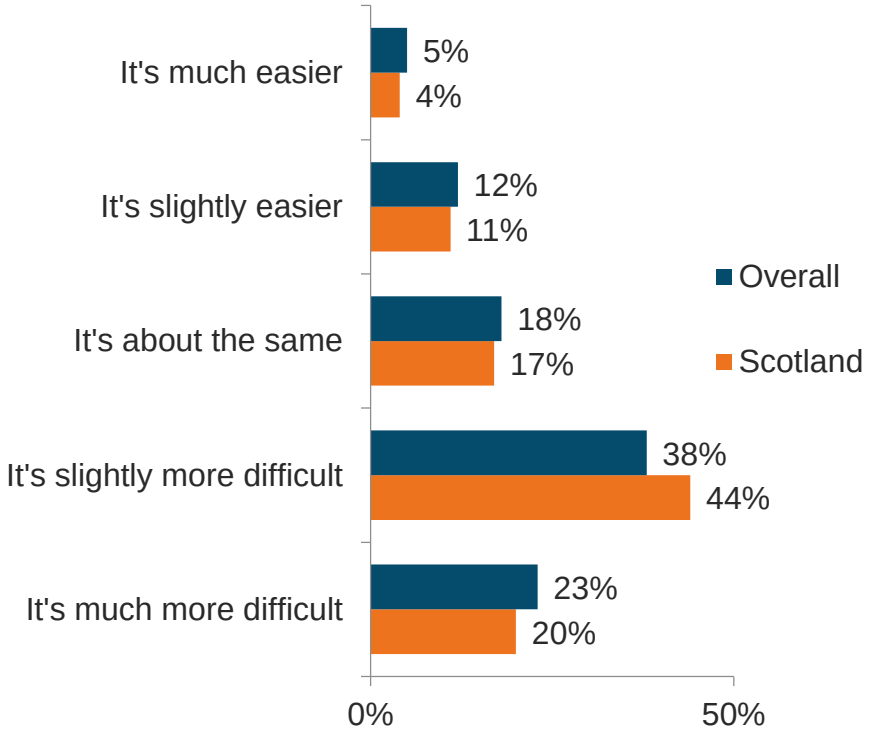
of Scotland customers claim to be satisfied with safety. The key reasons are **a consistent focus on safety and visibility that safety is a priority for Network Rail**

13%

of Scotland customers claim to be dissatisfied with safety. The key reasons are **lack of supervision and minimal control of contractors, insufficiently surveying infrastructure**

Working with Network Rail compared to other organisations

64% of customers on the Scotland route find it more difficult to work with Network Rail



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**	0.42	**3.78**	0.55	**3.30**	0.39	**-0.29**	0.14
TOC	CrossCountry	3%	1.75	-1.00	3.00	-0.50	2.00	-1.00	-1.00	-0.50
	Caledonian Sleeper	1%	3.20	N/A	3.00	N/A	2.00	N/A	-0.60	N/A
	Transpennine Express	2%	2.00	-0.67	3.33	0.24	2.75	0.55	-1.75	-1.08
	Virgin Trains	5%	3.60	1.60	4.20	-0.55	3.60	2.10	-0.20	1.05
FOC	Colas	<1%	3.75	-0.25	5.00	0.50	3.50	0.00	0.00	-0.50
	DB Schenker	2%	3.63	0.38	3.67	-0.55	3.75	0.00	0.00	0.19
	DirectRail Services	1%	2.71	-0.29	3.75	0.19	2.71	-0.39	-0.57	-0.17
	Freightliner Ltd	<1%	4.00	1.50	4.50	1.10	4.09	1.34	0.33	1.46
	Freightliner Heavy Haul	1%	3.86	1.06	3.83	-0.17	4.14	0.39	0.29	0.09
	GB Railfreight	<1%	3.00	-1.00	3.00	-0.50	3.20	-0.36	-0.20	-0.53
	DCR	<1%	5.00	1.00	5.00	1.00	4.00	0.00	2.00	1.50
	WCR	<1%	3.00	N/A	4.00	N/A	3.00	N/A	-1.00	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	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	
	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…?