Network Rail 2015 Customer Survey Report

Route Report: South East

Prepared by:

December 2015

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Methodology and Sample

Methodology and sample

Methodology	Sample	Response rates

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)
- 93 customers chose to answer about South East.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have declined considerably since last year and are below the national average.
- Train service performance is particularly low and a key area of focus.
- In terms of customer service attributes, SE is notably below average for 'trusted to improve Britain's railway', whilst performance for 'being customer driven' is also a concern.

Action Areas

1. Train service performance is the most critical area of focus.

2. Look to improve 'delivering what it says' and 'being customer driven', both of which are key drivers to overall satisfaction.

3. Ageing infrastructure is a concern, evident through the relatively weak performance of 'infrastructure maintenance and renewals'

20% Overall Satisfaction

Overall satisfaction has seen a significant decrease this year (-26% points)

26% Route Satisfaction

Route satisfaction is low for South East compared to all other routes, and compared to the national average of 46%

10% Train Service Performance

Train service performance has steeply declined since last year (-8% points) and is behind the overall national average of 39%.

13% Advocacy

Advocacy has dropped by 4% compared to last year.

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

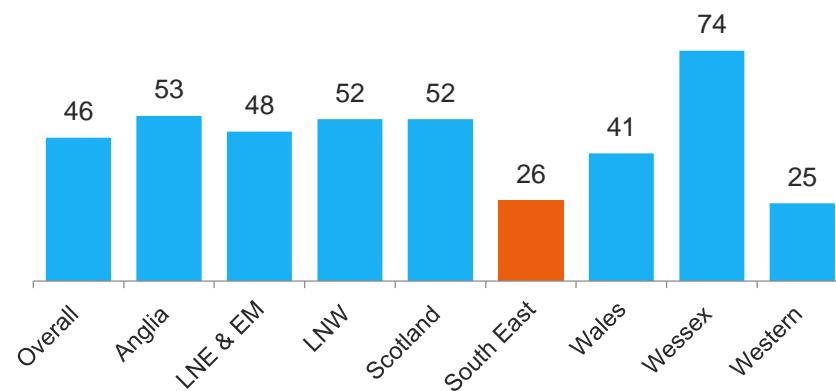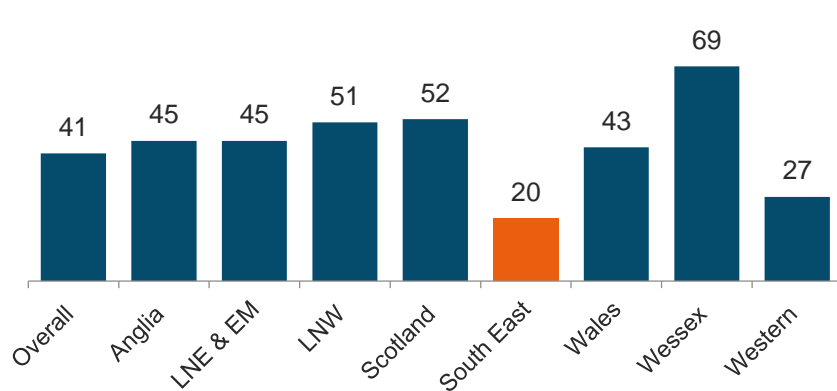**NetworkRail**

Route compared with overall findings

Key scores

South East has the lowest overall satisfaction and has seen steep declines for both overall and route satisfaction since 2014

Overall satisfaction
% satisfied

Route satisfaction
% satisfied

% change
since
2014

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

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

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

Route satisfaction:
- 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
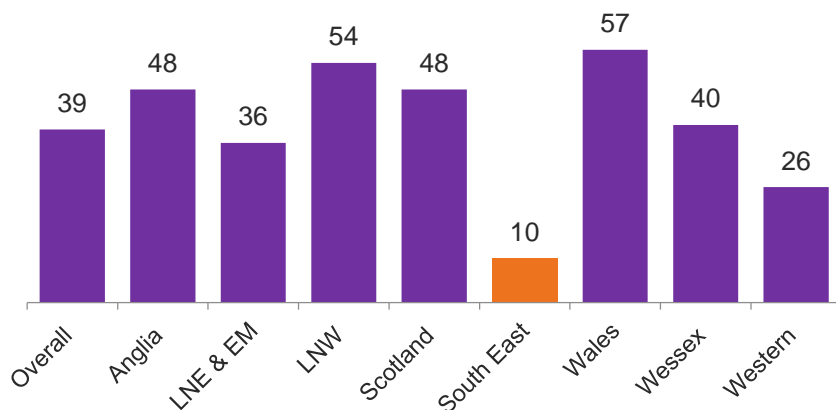
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Key scores

Train service performance is a concern for South East at only 10%, 29%pts below the national average

Satisfaction with train service performance
% satisfied

% change since 2013

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

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

Advocacy
% would speak highly

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

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

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

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Customer service attributes satisfaction

Performance across customer service attributes is generally below the overall national average, with the exceptions of collaborative working and effective communication

Overall versus Route: % satisfied

	Overall	South East	Gap*
Works collaboratively	53	56	+3
Prepared to challenge	53	50	-3
Effective communication	42	46	+4
Focus on long term strategic needs	33	29	-4
Takes ownership	37	31	-6
Learns and applies lessons learnt	21	15	-6
Customer driven	19	17	-2
Delivers what it says	22	20	-2
Cares about rail passengers	22	16	-6
Can be trusted to improve Britain's railways	27	18	-9

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

South East performance for Route Operations and Infrastructure maintenance and renewals is substantially below national average

Overall versus Route: % satisfied

	Overall	South East	Gap*
Route operations	42	26	-16
Strategic Route planning	32	38	+6
Managed stations	31	22	-9
Franchised stations and depots	26	21	-5
Delivery of enhancements projects	21	18	-3
Timetable planning	24	20	-4
Infrastructure maintenance and renewals	26	5	-21
Access planning	22	23	+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 continues to decline this year with only one fifth of South East customers satisfied with Network Rail

Overall satisfaction: year on year

% satisfied

South East overall satisfaction:

response breakdown
compared with previous year

Mean = 3.05   Mean = 3.14   Mean = 2.58

■ Very satisfied
■ Fairly satisfied
□ Neither
■ Fairly dissatisfied
■ Very dissatisfied
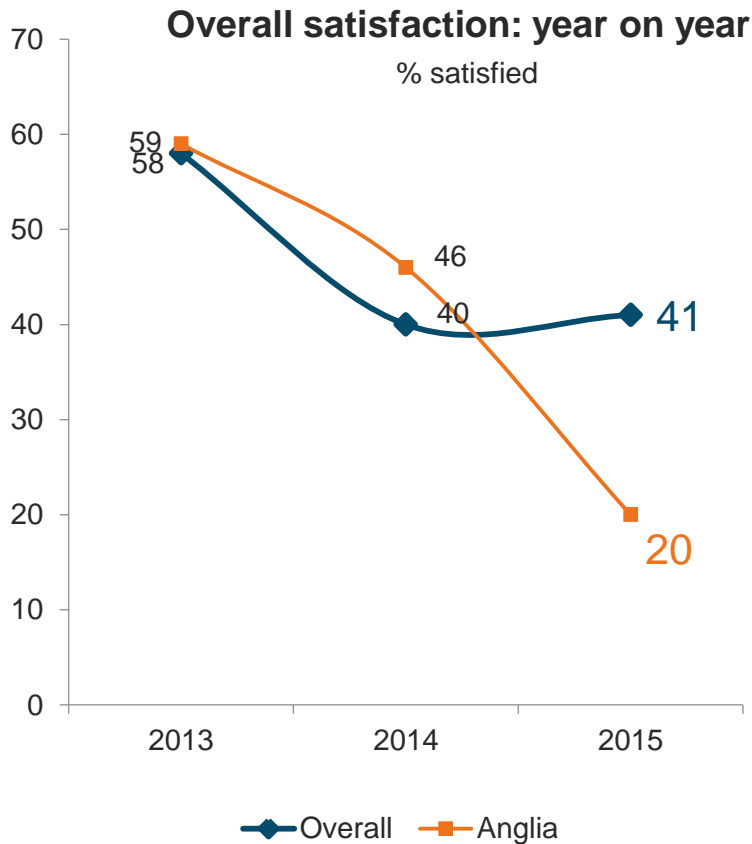
Q1. Taking into account all of your experiences with Network Rail during the last 12 months as a whole, how satisfied or dissatisfied are you with Network Rail?
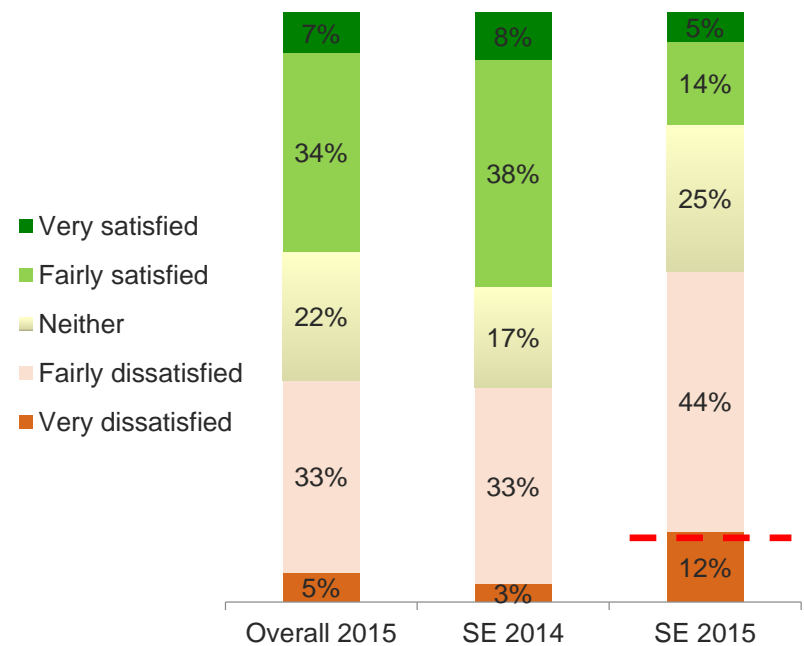
NET DISSATISFACTION SHOULD NOT EXCEED **15%** AT ROUTE LEVEL

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Reasons for overall satisfaction/dissatisfaction

20% of South East customers claim to be satisfied. The key reasons are **collaborative working**

56% of South East customers claim to be dissatisfied. The key reasons are **responsiveness, lack of alignment of objectives**

Route satisfaction

Satisfaction on the South East is 20%pts lower than the national average

Route satisfaction: year on year
% satisfied

- Overall
- SE
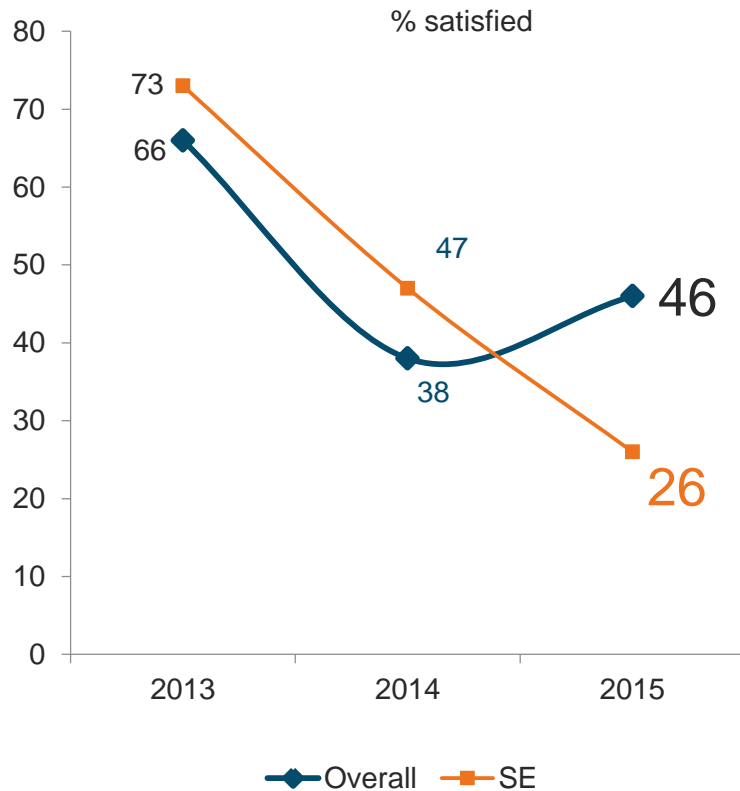
South East route satisfaction:
response breakdown
compared with previous year

Mean = 3.30   Mean = 3.28   Mean = 2.71

	Overall 2015	SE 2014	SE 2015
Very satisfied	10%	13%	26%
Fairly satisfied	37%	34%	
Neither	22%	22%	25%
Fairly dissatisfied	20%	18%	38%
Very dissatisfied	5%	8%	9%
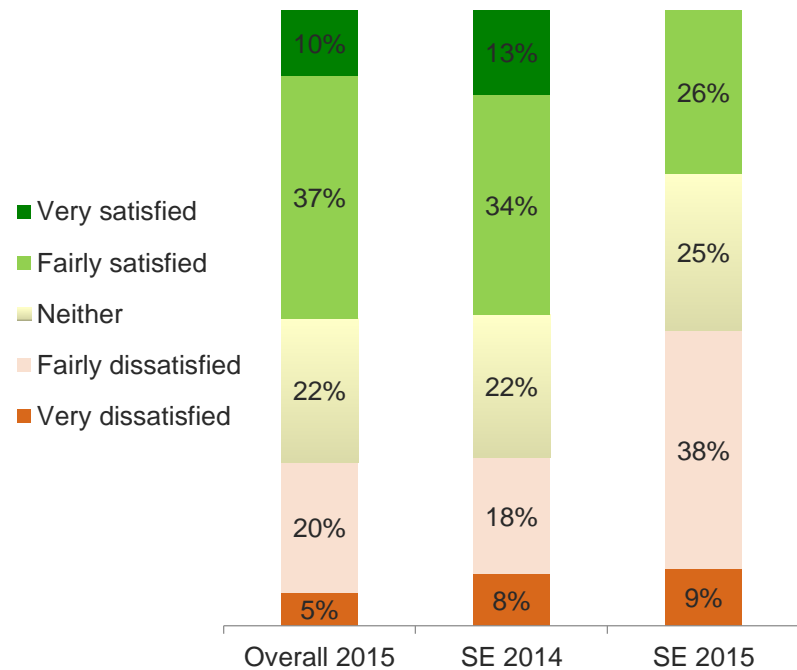
Q19. How satisfied or dissatisfied are you with Network Rail on the following routes?

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Reasons for route satisfaction/dissatisfaction

26% of South East customers claim to be satisfied. The key reasons are **good customer service and confidence in the route team**

46% of South East customers claim to be dissatisfied. The key reasons are **responsiveness, collaborative working**

Overall train service performance

Train service performance continues to decline for South East, with only 10% satisfied

Satisfaction with train service performance:
year on year
% satisfied
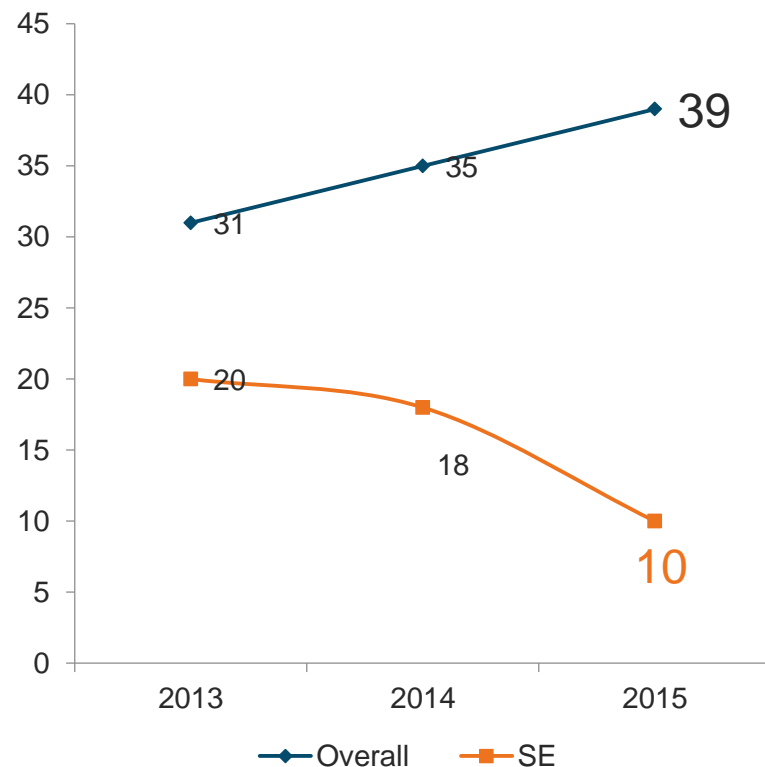
South East train service performance - response breakdown compared with previous year
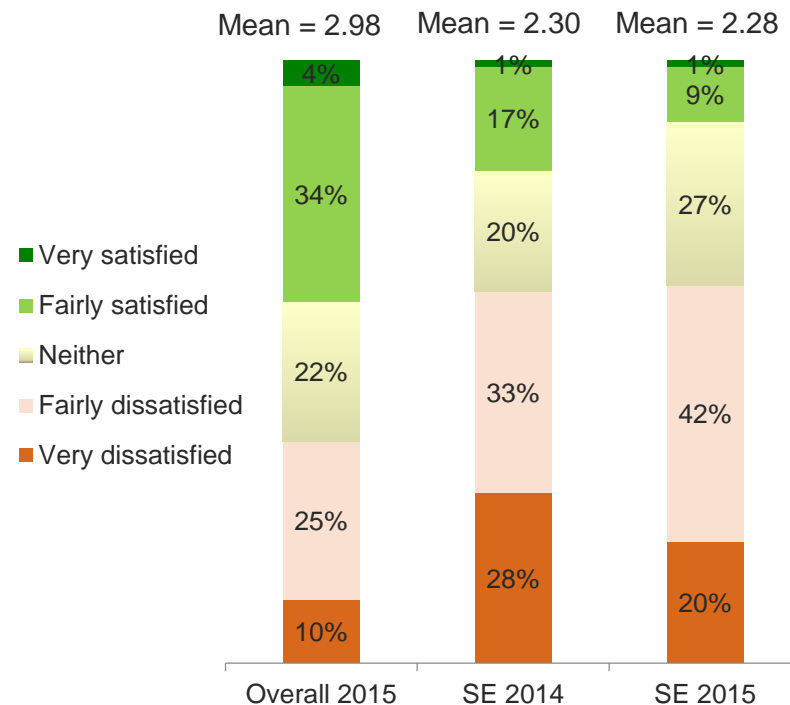
- Very satisfied
- Fairly satisfied
- Neither
- Fairly dissatisfied
- Very dissatisfied

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

South East customers believe Network Rail **needs to improve** on train service performance for the following key reasons: **infrastructure issues, delays in issue resolution**

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 is in line with the overall national average, however it has declined by 4%pts this year

Advocacy: year on year
% speak highly
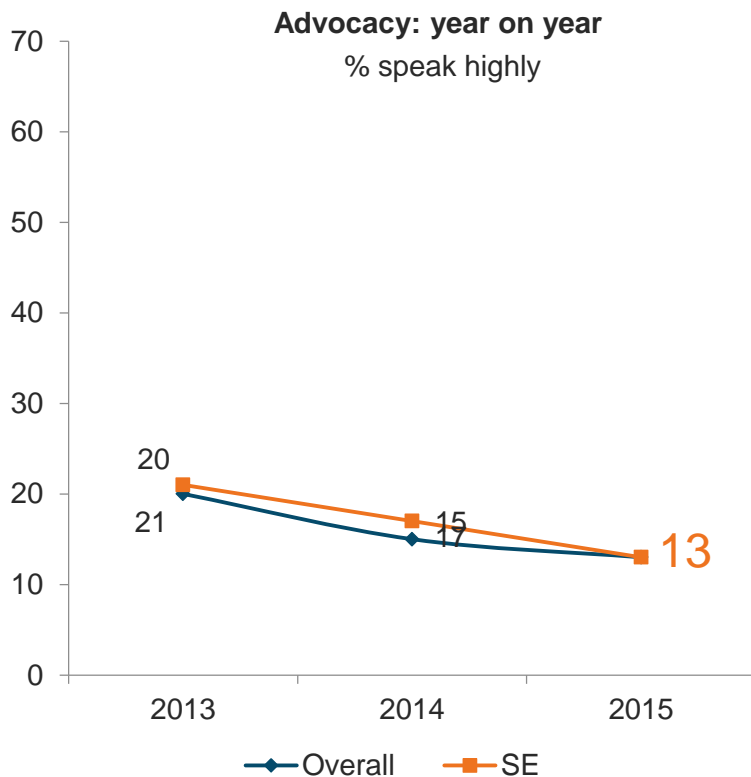
South East advocacy - response breakdown compared with previous year

Mean = -0.43   Mean = -0.19   Mean = -0.42

- ■ Speak highly without being asked
- ■ Speak highly, if asked
- ■ Neutral
- ■ Critical if asked
- ■ Critical without being asked
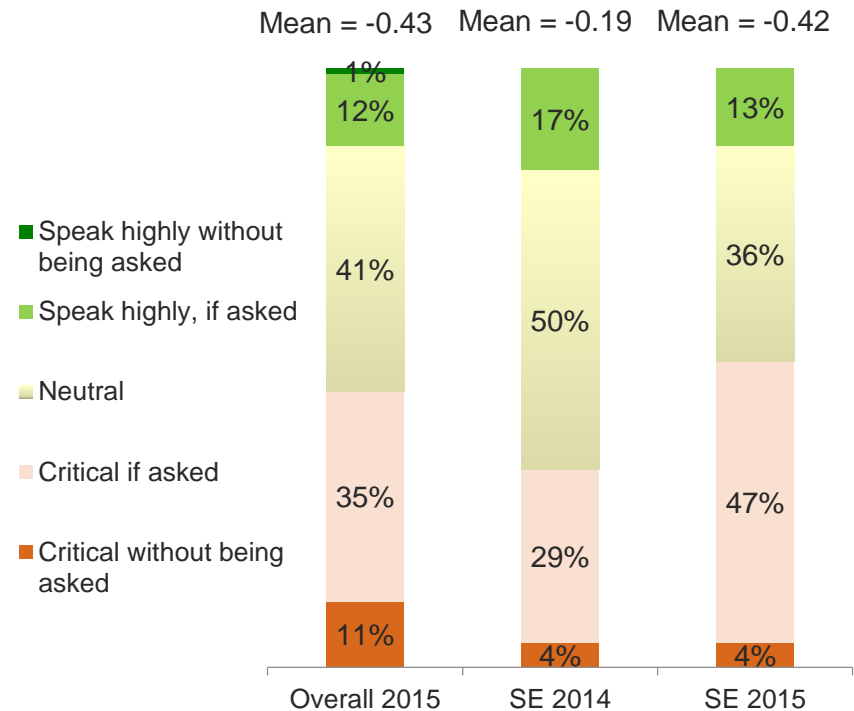
Q3. Which of these best describes how you feel about Network Rail as an organisation overall, taking all you know about them into consideration?

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Additional findings

Drivers of satisfaction against route performance: South East
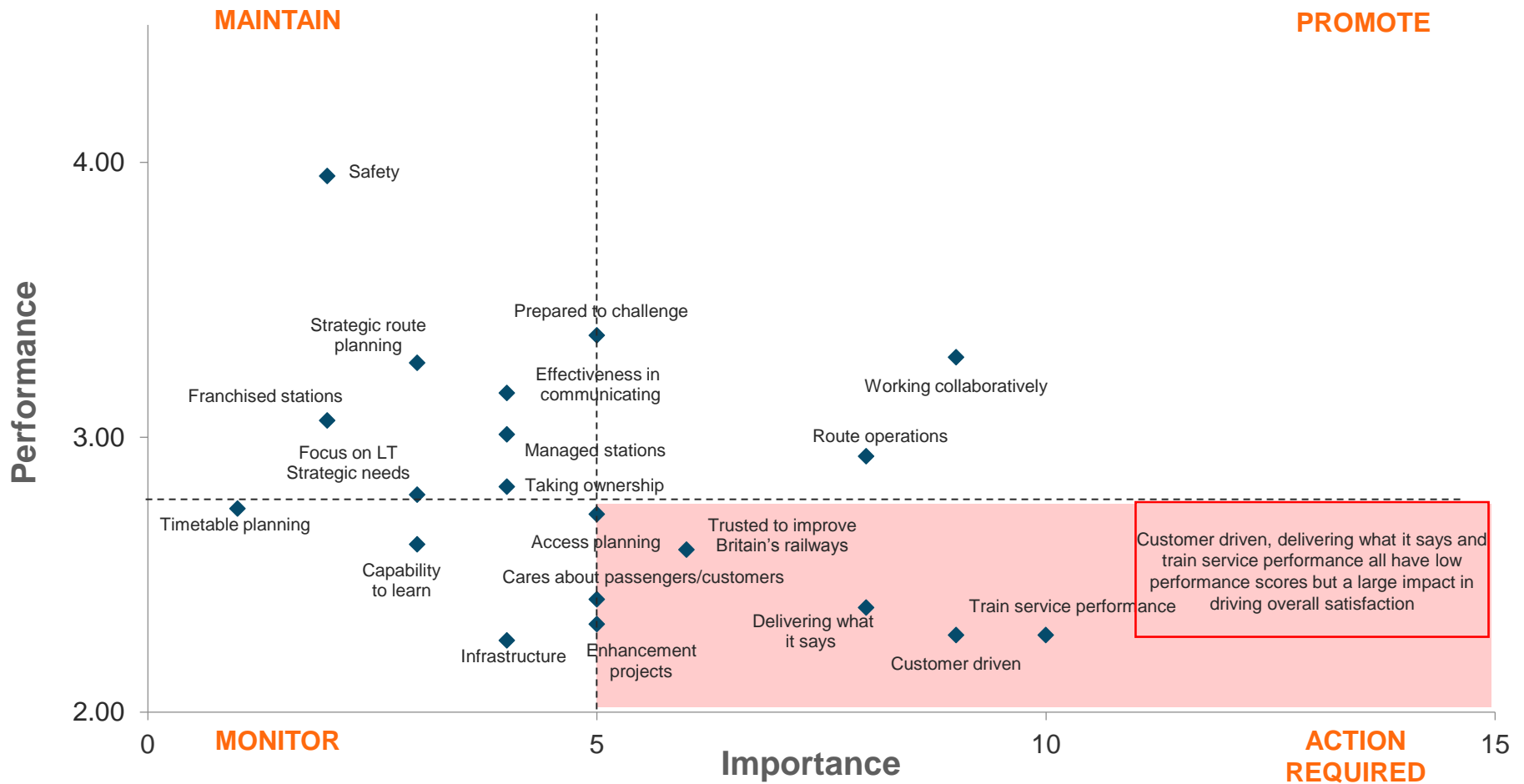
Satisfaction with safety

Whilst overall satisfaction has slightly increased this year, the proportion of very satisfied customers has declined by 31%pts

Satisfaction with safety:

year on year

% satisfied

Overall: 79 (2013), 73 (2014), 73 (2015)
SE: 76 (2013), 75/73 (2014), 77 (2015)

◆ Overall   ■ SE
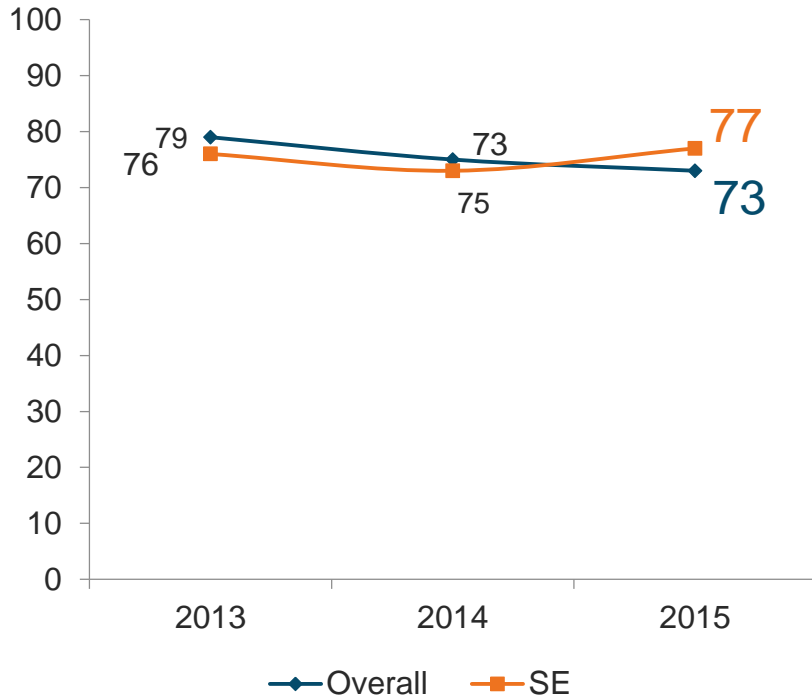
South East satisfaction with safety - response breakdown compared with previous year

Mean = 3.92   Mean = 4.35   Mean = 3.95

	Overall 2015	SE 2014	SE 2015
Very satisfied	26%	54%	23%
Fairly satisfied	46%	20%	54%
Neither	12%	18%	9%
Fairly dissatisfied	9%	1%	9%
Very dissatisfied	1%		

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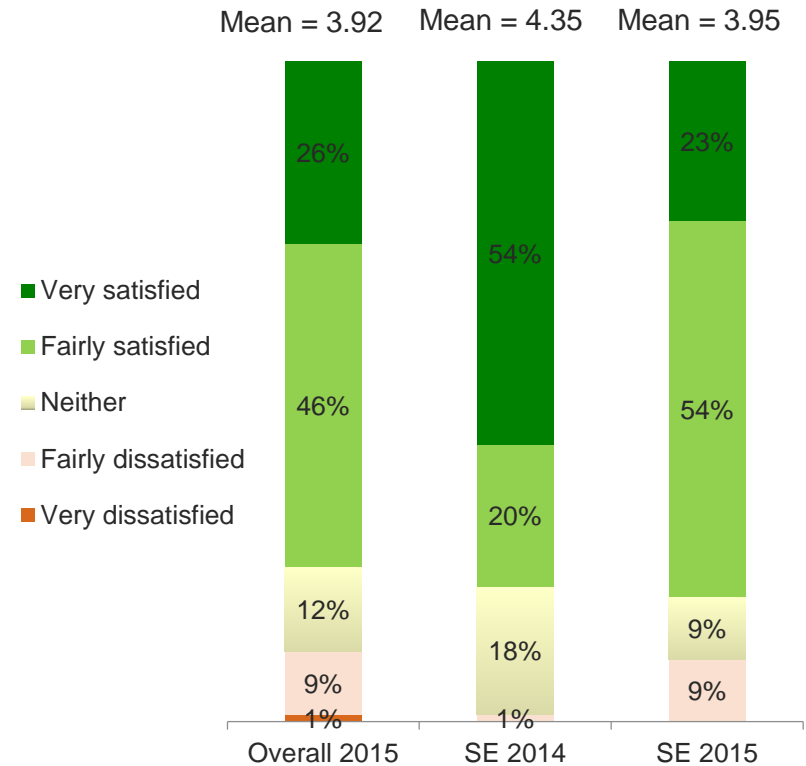
Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

Reasons for satisfaction/dissatisfaction with safety

77% of South East 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**

9% of South East customers claim to be dissatisfied with safety. The key reasons are **insufficient planning, slow responsiveness, neglect of maintenance and repairs**

Working with Network Rail compared to other organisations

South East performs broadly in line with the overall average with 59% finding it more difficult to work with Network Rail
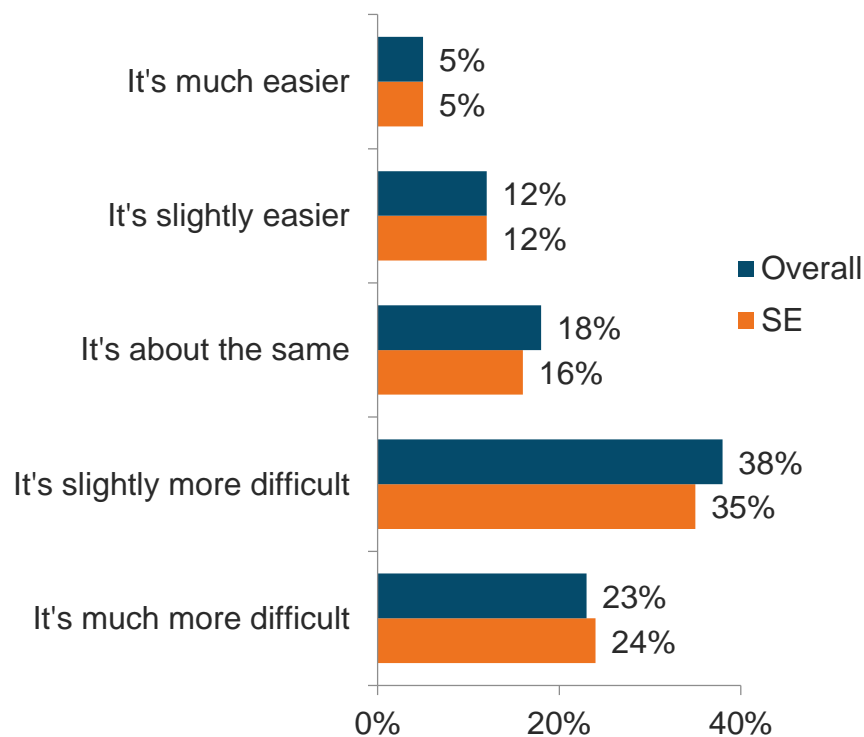
Q7. Compared with other organisations you work with, how do you find working with Network Rail?
Q8. Why do you say that?

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

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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**	**2.58**	-0.56	**2.71**	-0.47	**2.28**	-0.02	**-0.42**	-0.23
TOC	Eurostar Intl	<1%	3.90	0.07	3.70	-0.47	4.00	-0.33	0.30	-0.53
	GTR	52%	2.64	-0.36	2.82	-0.35	2.36	-0.81	-0.27	-0.44
	GWR	1%	3.50	-1.50	4.00	-1.00	3.50	-0.50	0.00	-2.00
	London Overground	3%	3.67	0.53	1.67	-1.19	3.00	0.17	0.33	0.47
	London Underground	<1%	4.00	0.50	2.00	-1.00	4.00	1.00	0.00	0.00
	Southeastern	43%	2.38	-0.76	2.52	-0.62	2.00	0.00	-0.67	-0.46
FOC	Colas	<1%	3.75	-0.25	4.00	0.00	3.50	0.00	0.00	-0.50
	DB Schenker	1%	3.63	0.38	4.00	0.57	3.75	0.00	0.00	0.19
	DirectRail Services	<1%	2.71	-0.29	4.00	0.75	2.71	-0.39	-0.57	-0.17
	Freightliner Ltd	<1%	4.00	1.50	3.33	NA	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	3.25	-0.04	3.20	-0.36	-0.20	-0.53
	DCR	<1%	5.00	1.00	3.00	-1.00	4.00	0.00	2.00	1.50
	WCR	<1%	3.00	N/A	3.00	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.

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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…?

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