NetworkRail

Network Rail 2015 Customer Survey Report

Route Report: Wales

Prepared by: **GfK**

December 2015

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Methodology and Sample

Methodology and sample

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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)
- 60 customers chose to answer about Wales.

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Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have improved marginally since last year.
- Wales is the strongest performing route in terms of train service performance and advocacy.
- Performance is above average across most customer service attributes, particularly for 'being prepared to challenge' and 'cares about customers'.
- However, being more customer driven and focussing on long term strategic needs perform below average.

Action Areas

1. Being more customer driven impacts significantly on overall satisfaction and therefore should be an area of focus.

2. Delivering what it says and trusted to improve Britain's railways also have low ratings and are key drivers of satisfaction

3. Despite the notable increase in train service performance, this should still be a continued area of focus.

4. Address issues on safety which is well below the overall average and has declined further since the significant drop last year.

43% Overall Satisfaction

Overall satisfaction has increased by 4%pts this year.

41% Route Satisfaction

Route satisfaction has improved marginally since last year, but is relatively low compared to other routes, and the overall average of 46%

57% Train Service Performance

Train service performance has increased significantly since last year (+41% points) and is ahead of the overall average of 39%.

25% Advocacy

The proportion of customers speaking highly of Network Rail is 12%pts above the overall average.

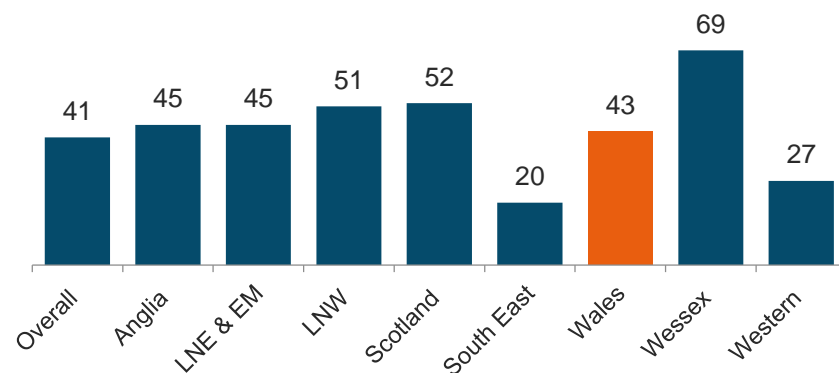Green is an increase of 5% or more, Red is a decrease of 5% or more on 2014

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© GfK 2015 | GfK Business | Network Rail Customer Report | 2015
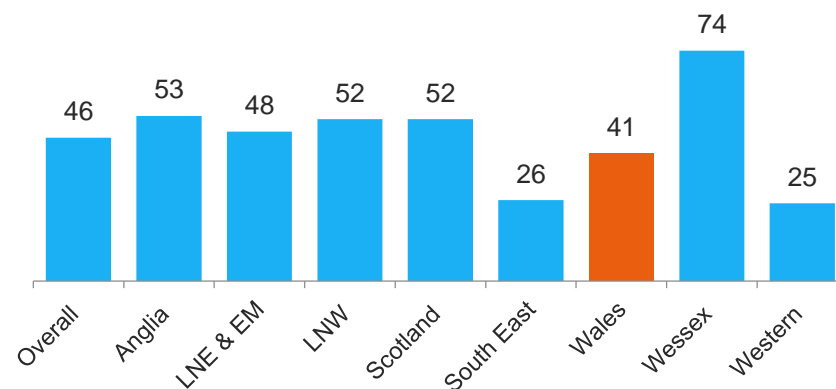
Route compared with overall findings

Key scores

Overall satisfaction is broadly in line with the national average, satisfaction on the Wales route is 5%pts below average

Overall satisfaction
% satisfied

% change since 2014

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

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

Route satisfaction
% satisfied

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

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

Both satisfaction with train service performance and advocacy are strongest amongst Wales customers, with both measures seeing notable increases this year

Satisfaction with train service performance
% satisfied

% change since 2014

+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
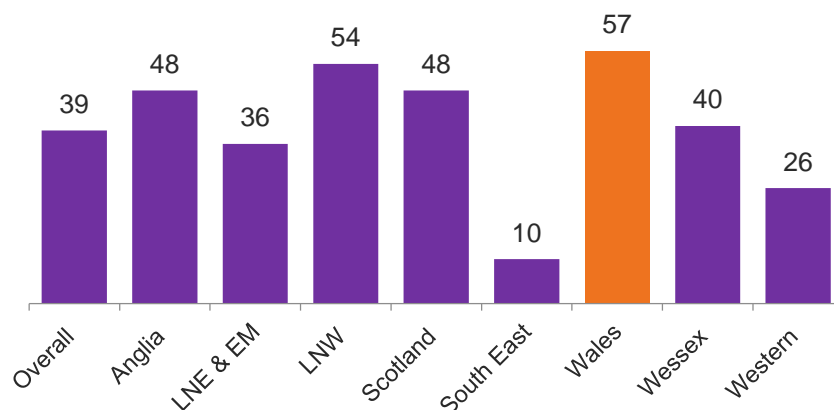
Advocacy
% would speak highly

-2	3	-5	+1	+5	-4	+14	-13	-1
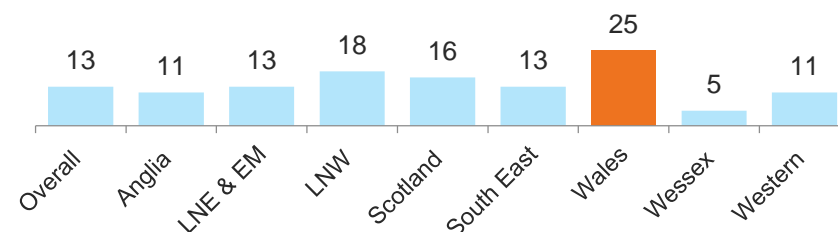
- Overall: 13
- Anglia: 11
- LNE & EM: 13
- LNW: 18
- Scotland: 16
- South East: 13
- Wales: 25
- Wessex: 5
- Western: 11

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

Wales performs substantially above average for the majority of customer service attributes, with strongest performance in being prepared to challenge you

Overall versus Route: % satisfied

	Overall	Wales	Gap*
Works collaboratively	53	60	+7
Prepared to challenge	53	72	+19
Effective communication	42	47	+5
Focus on long term strategic needs	33	30	-3
Takes ownership	37	49	+12
Learns and applies lessons learnt	21	30	+9
Customer driven	19	16	-3
Delivers what it says	22	26	+4
Cares about rail passengers	22	28	+6
Can be trusted to improve Britain's railways	27	40	+13

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

Performance is generally above national average. Route operations is a particular strength for Wales relative to the other routes

Overall versus Route: % satisfied

	Overall	Wales	Gap*
Route operations	42	57	+15
Strategic Route planning	32	37	+5
Managed stations	31	25	-6
Franchised stations and depots	26	28	+2
Delivery of enhancements projects	21	34	+13
Timetable planning	24	24	0
Infrastructure maintenance and renewals	26	35	+9
Access planning	22	29	+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

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Route key scores

Overall satisfaction

The proportion of customers 'very satisfied' with Network Rail has increased by 10%pts since 2014

Overall satisfaction: year on year
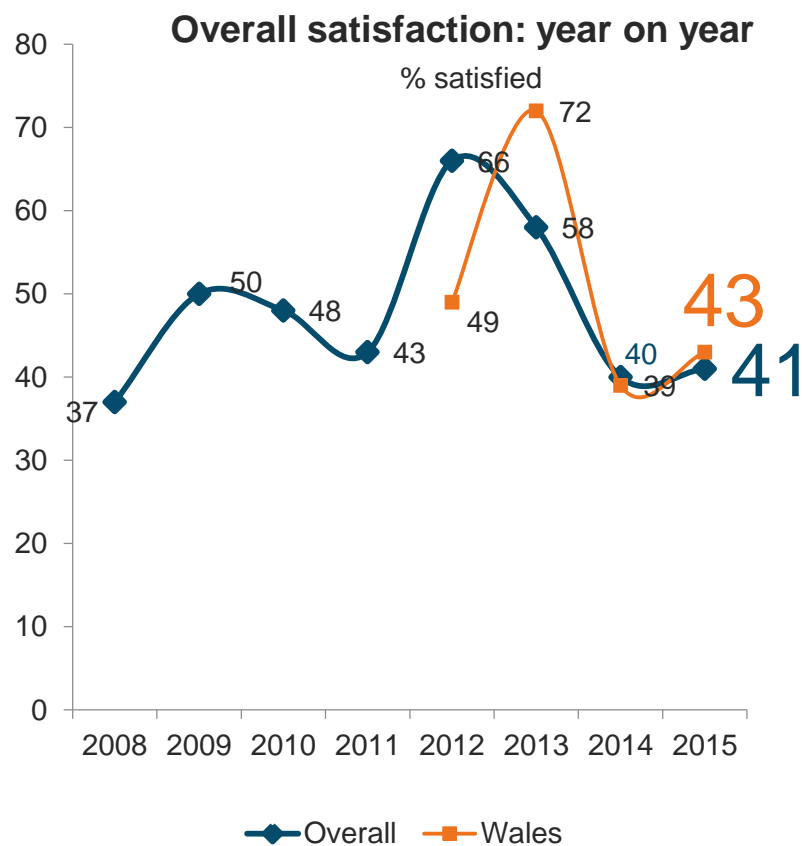
% satisfied

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?
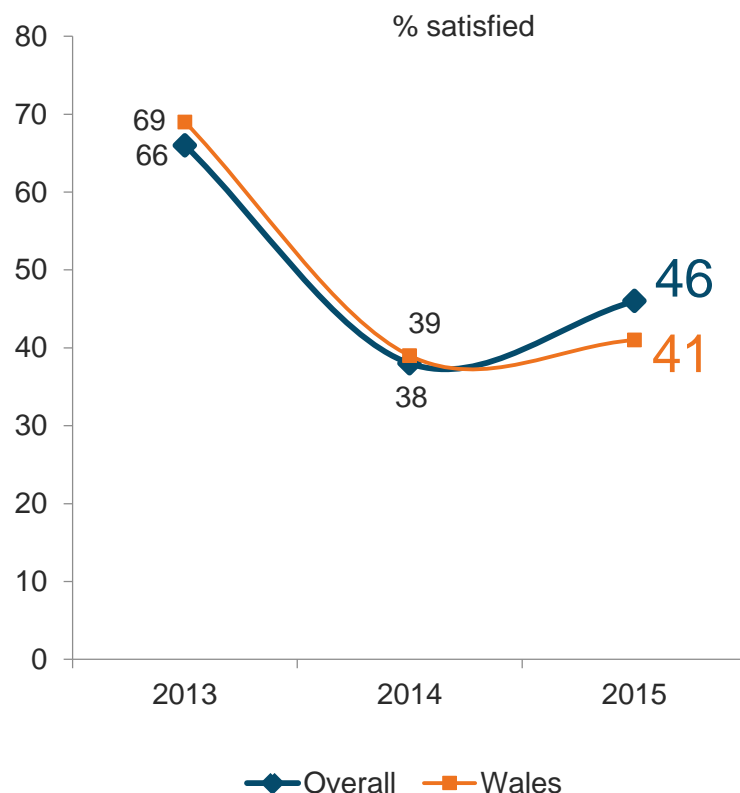
Wales overall satisfaction:
response breakdown
compared with previous year

Mean = 3.05   Mean = 2.98   Mean = 3.29

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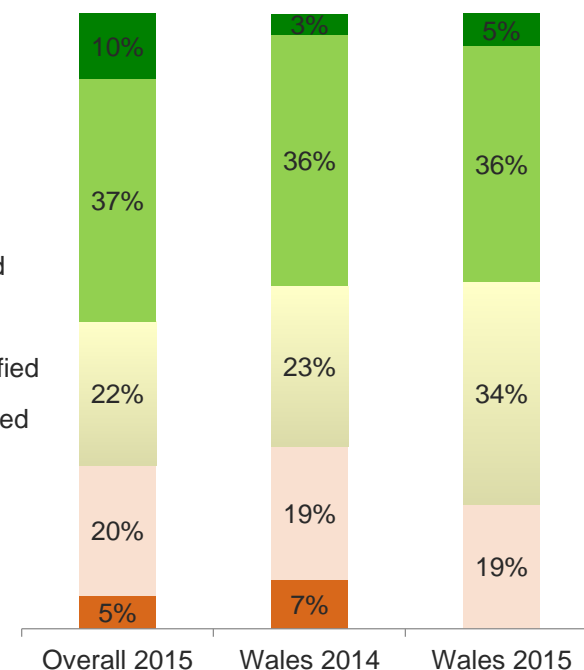
NET DISSATISFACTION SHOULD NOT EXCEED **15%** AT ROUTE LEVEL

Reasons for overall satisfaction/dissatisfaction

43% of Wales customers claim to be satisfied. The key reasons are **strong, collaborative relationships with NR representatives**

27% of Wales customers claim to be dissatisfied. The key reasons are **poor customer service, delays, inability to meet deadlines**

Reasons for route satisfaction/dissatisfaction

41% of Wales customers claim to be satisfied. The key reasons are **effective communication, capability to learn and efficient processes**

19% of Wales customers claim to be dissatisfied. The key reasons are **responsiveness, infrastructure issues**

Overall train service performance

Satisfaction with train service performance has increased by 41%pts this year, and the proportion of 'very satisfied' customers has increased from 1% to 14%

Satisfaction with train service performance: year on year

% satisfied
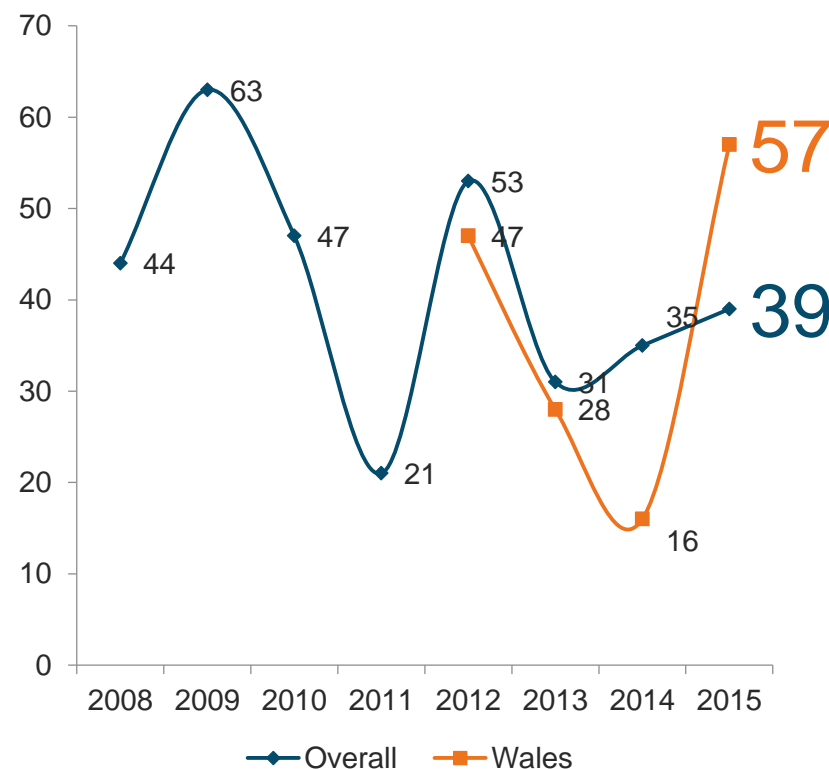
Wales train service performance - response breakdown compared with previous year
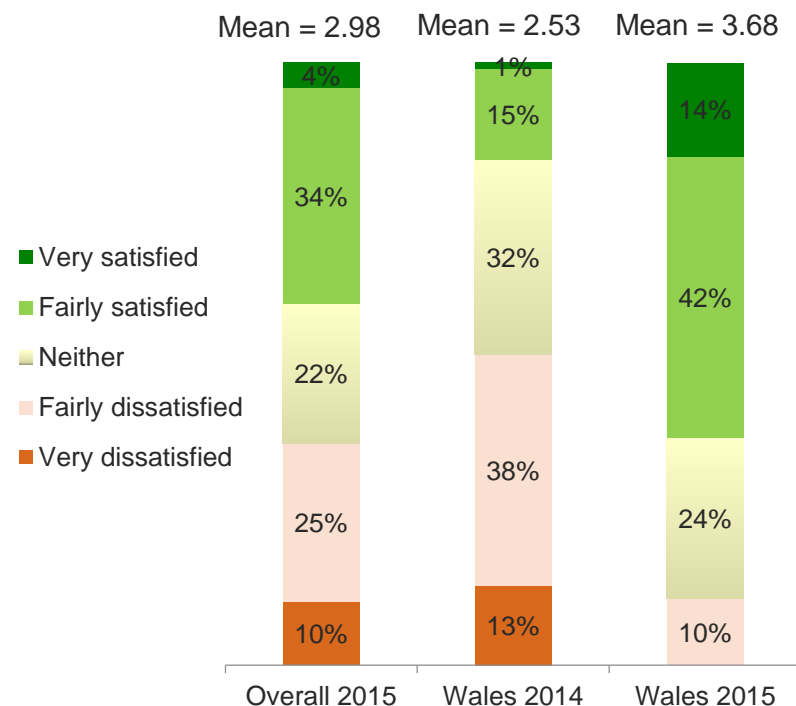
Mean = 2.98   Mean = 2.53   Mean = 3.68

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

Overall 2015   Wales 2014   Wales 2015

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

Wales customers believe Network Rail **needs to improve** on train service performance for the following key reasons: **lack of operational knowledge and poor planning**

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

Whilst advocacy has increased by 14%pts this year, the proportion that would be critical has increased by 16%pts

Advocacy: year on year

% speak highly

Overall — Wales
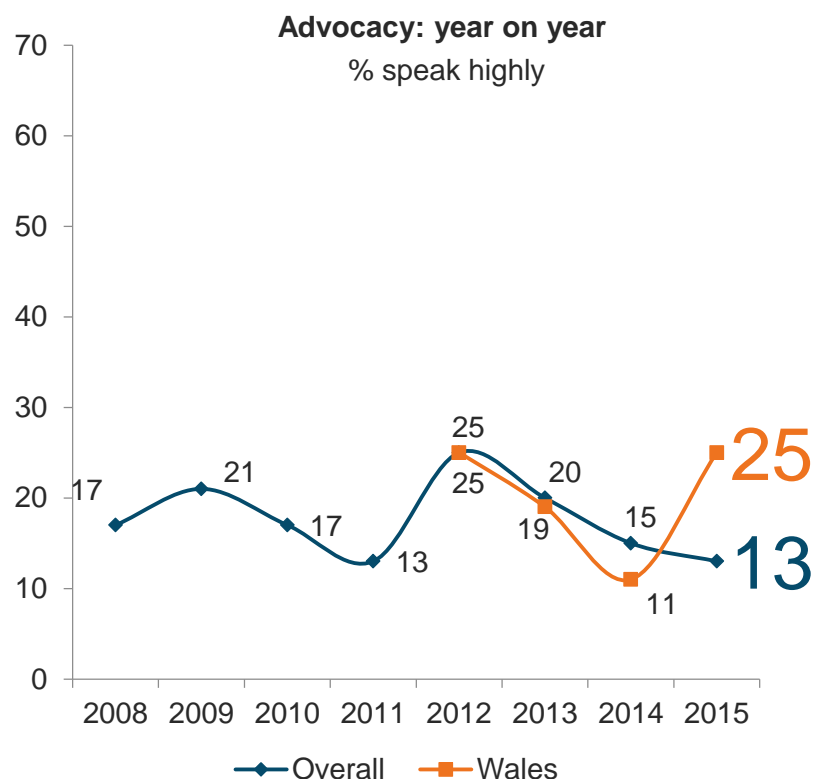
Wales advocacy - response breakdown compared with previous year

Mean = -0.43   Mean = -0.41   Mean = -0.31

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

Overall 2015   Wales 2014   Wales 2015
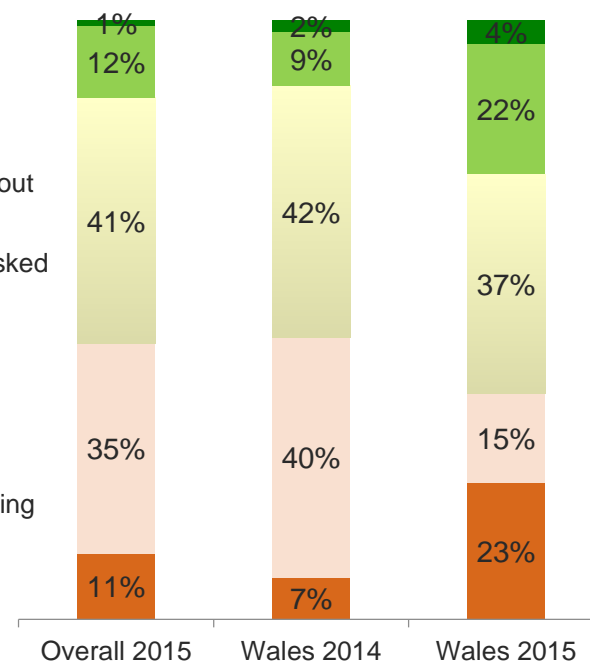
Q3. Which of these best describes how you feel about Network Rail as an organisation overall, taking all you know about them into consideration?

Additional findings

Drivers of satisfaction against route performance: Wales

MAINTAIN

PROMOTE

MONITOR

ACTION REQUIRED

Performance

Importance

4.00

3.00

2.00

0

5

10

15

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

Customer driven and delivering what it says have low performance scores but a large impact in driving overall satisfaction

Satisfaction with safety

Whilst satisfaction has remained stable, dissatisfaction with safety has increased by 24%pts this year and only 2% would remain neutral

Satisfaction with safety:

year on year

% satisfied
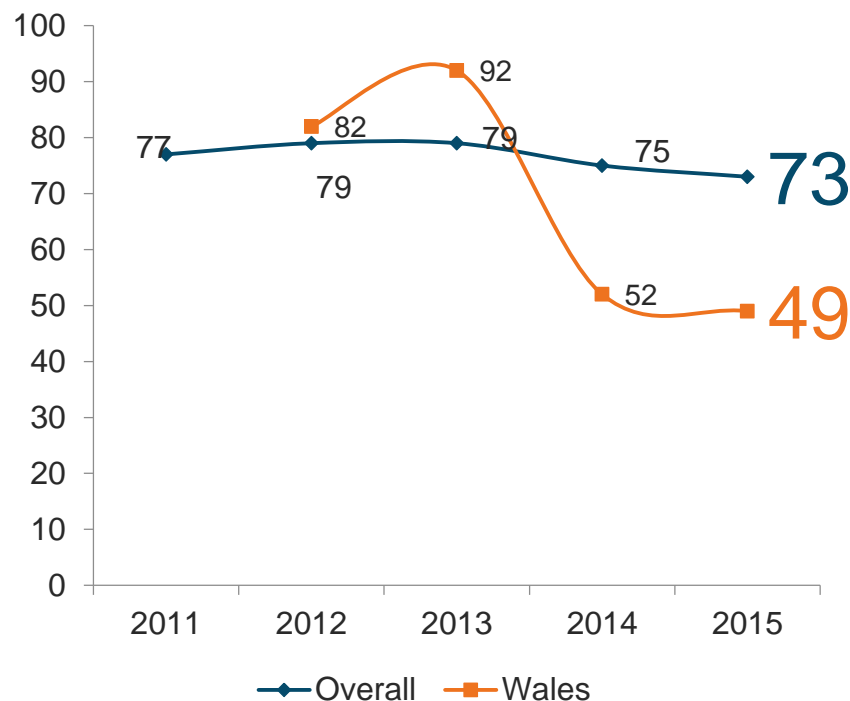
Wales satisfaction with safety - response breakdown compared with previous year

Mean = 3.92   Mean = 3.66   Mean = 3.49

Legend:
- Very satisfied
- Fairly satisfied
- Neither
- Fairly dissatisfied
- Very dissatisfied

Overall 2015 | Wales 2014 | Wales 2015
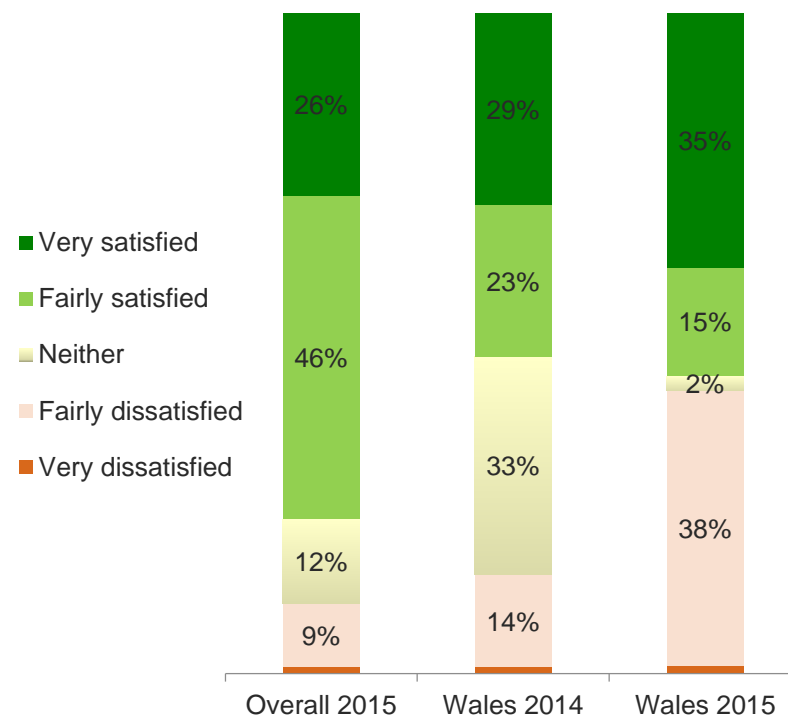
Q4a. Thinking about all of your experiences with Network Rail in the past 12 months, please indicate how satisfied or dissatisfied you are with Network Rail always putting safety first

Reasons for satisfaction/dissatisfaction with safety

49% of Wales customers claim to be satisfied with safety. The key reasons are **safety is embedded into NR culture and planning, visibility that safety is a priority for Network Rail**

39% of Wales customers claim to be dissatisfied with safety. The key reasons are **failure to address safety incidents, safety not embedded through entire supply chain**

Working with Network Rail compared to other organisations

59% find it more difficult to work with Network Rail, although the proportion finding it 'much more difficult' is lower than the national average.

It's much easier
- 5% (Overall)
- 10% (Wales)

It's slightly easier
- 12% (Overall)
- 7% (Wales)

It's about the same
- 18% (Overall)
- 13% (Wales)

It's slightly more difficult
- 38% (Overall)
- 45% (Wales)

It's much more difficult
- 23% (Overall)
- 14% (Wales)

Legend: ■ Overall ■ Wales

X-axis: 0% — 50%
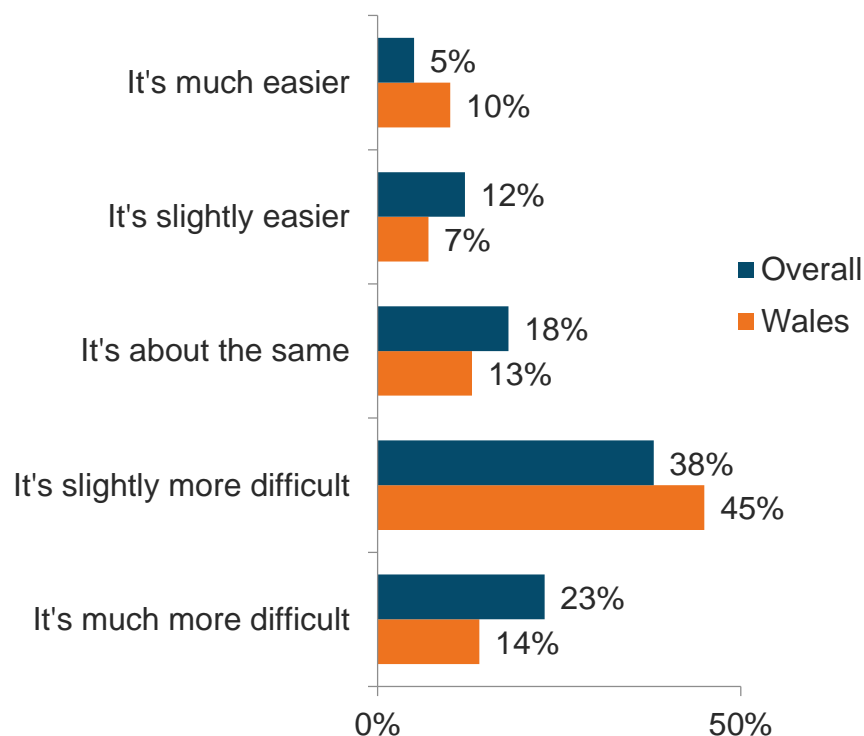
Q7. Compared with other organisations you work with, how do you find working with Network Rail?
Q8. Why do you say that?

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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

Mean Scores	% Miles by Route 2014	Overall satisfaction		Route satisfaction		Train Performance		Advocacy	
		2015	2014/2015 +/-	2015	2014/2015 +/-	2015	2014/2015 +/-	2015	2014/2015 +/-
Overall Route Score	**Total**	**3.29**	0.31	**3.29**	0.18	**3.68**	1.15	**-0.31**	0.10
Arriva Trains Wales	75%	3.25	0.42	3.13	0.22	3.86	1.53	-0.38	0.12
CrossCountry	3%	2.00	-1.00	3.00	-0.60	3.00	0.00	-1.50	-0.90
GWR	12%	3.25	-0.35	4.00	-0.25	2.75	-0.05	-0.25	-0.25
Virgin Trains	2%	4.00	2.00	4.00	-0.50	4.00	3.00	0.00	1.50
Colas	<1%	3.75	-0.25	4.33	-0.67	3.50	0.00	0.00	-0.50
DB Schenker	6%	3.63	0.38	4.67	1.22	3.75	0.00	0.00	0.19
DirectRail Services	<1%	2.71	-0.29	3.50	0.00	2.71	-0.39	-0.57	-0.17
Freightliner Ltd	<1%	4.00	1.50	3.75	1.42	4.09	1.34	0.33	1.46
Freightliner Heavy Haul	<1%	3.86	1.06	4.00	1.25	4.14	0.39	0.29	0.09
GB Railfreight	<1%	3.00	-1.00	3.00	-0.17	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
West Coast Rail	<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.

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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