


Network Rail 2015 Customer Survey Report

Route Report: Wessex

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)
- 73 customers chose to answer about Wessex.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction are high, recovering from the drop seen last year.
- Train service performance has declined but remains in line with the overall average.
- In terms of customer service attributes, 'working collaboratively' performs very well, and markedly above the overall average.
- However, 'being customer driven' performs relatively poorly.

Action Areas

1. Being more customer driven is a key area of focus having a significant impact on driving satisfaction.
2. Train service performance should still continually be improved.
3. Improve delivering what it says. This is relatively high in terms of importance to driving satisfaction.
4. Continued focus on safety.

69% Overall Satisfaction

Overall satisfaction has seen a significant increase this year (+22% points)

74% Route Satisfaction

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

40% Train Service Performance

Train service performance has decreased since last year (-6% points) and is now in line with the overall national average of 39%.

5% Advocacy

Advocacy has dropped markedly by 13% 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

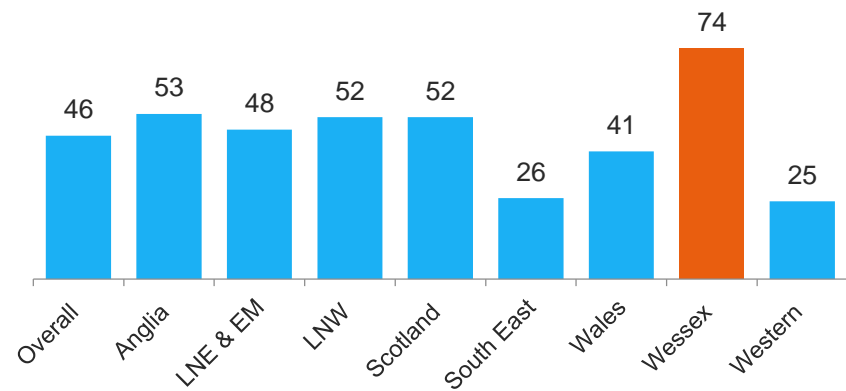
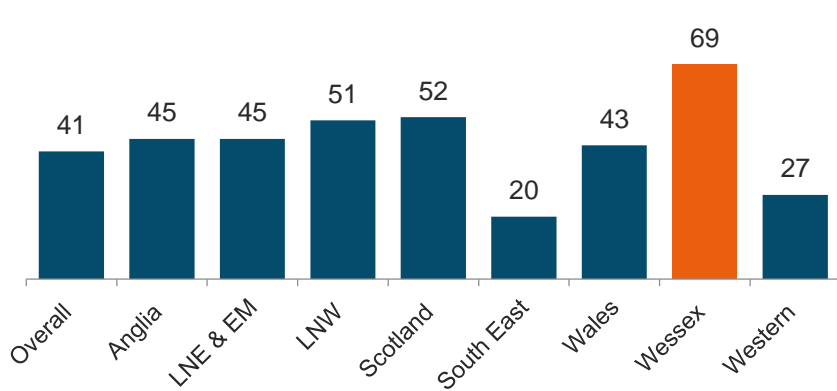
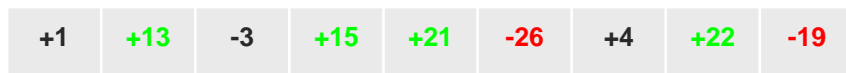
Key scores

Wessex has the strongest performance for both overall and route satisfaction, performing 28%pts above national average for both metrics

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

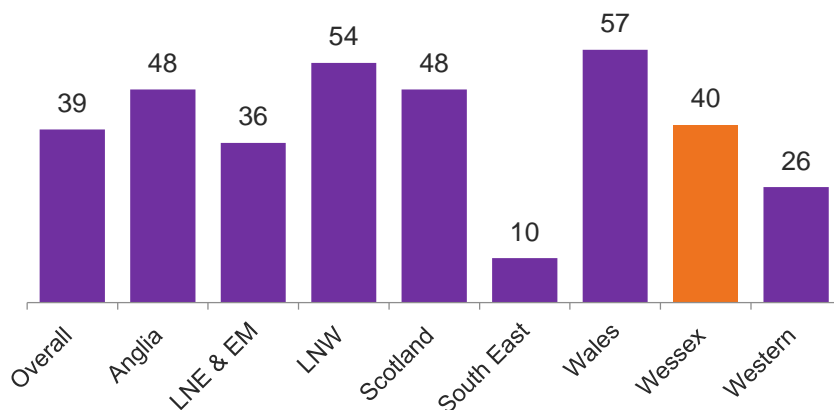
Key scores

Although overall satisfaction is high, advocacy is the lowest of all the routes at only 5% (-13% pts from last year)

Satisfaction with train service performance
% satisfied

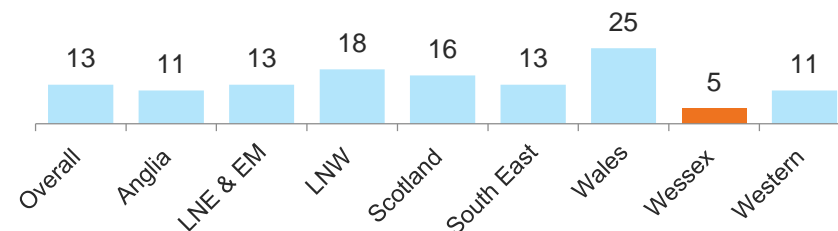
% change since 2014

+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

Wessex route performs substantially above average on the majority of customer service attributes, with a particularly high score for collaborative working.

Overall versus Route: % satisfied

	Overall	Wessex	Gap*
Works collaboratively	53	73	+20
Prepared to challenge	53	64	+11
Effective communication	42	46	+4
Focus on long term strategic needs	33	39	+6
Takes ownership	37	50	+13
Learns and applies lessons learnt	21	18	-3
Customer driven	19	22	+3
Delivers what it says	22	27	+5
Cares about rail passengers	22	24	+2
Can be trusted to improve Britain's railways	27	35	+8

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

Wessex performs considerably above average for all activity areas, in particular managed stations and franchised stations and depots.

Overall versus Route: % satisfied

	Overall	Wessex	Gap*
Route operations	42	66	+24
Strategic Route planning	32	48	+16
Managed stations	31	69	+38
Franchised stations and depots	26	69	+43
Delivery of enhancements projects	21	32	+11
Timetable planning	24	48	+24
Infrastructure maintenance and renewals	26	35	+9
Access planning	22	49	+27

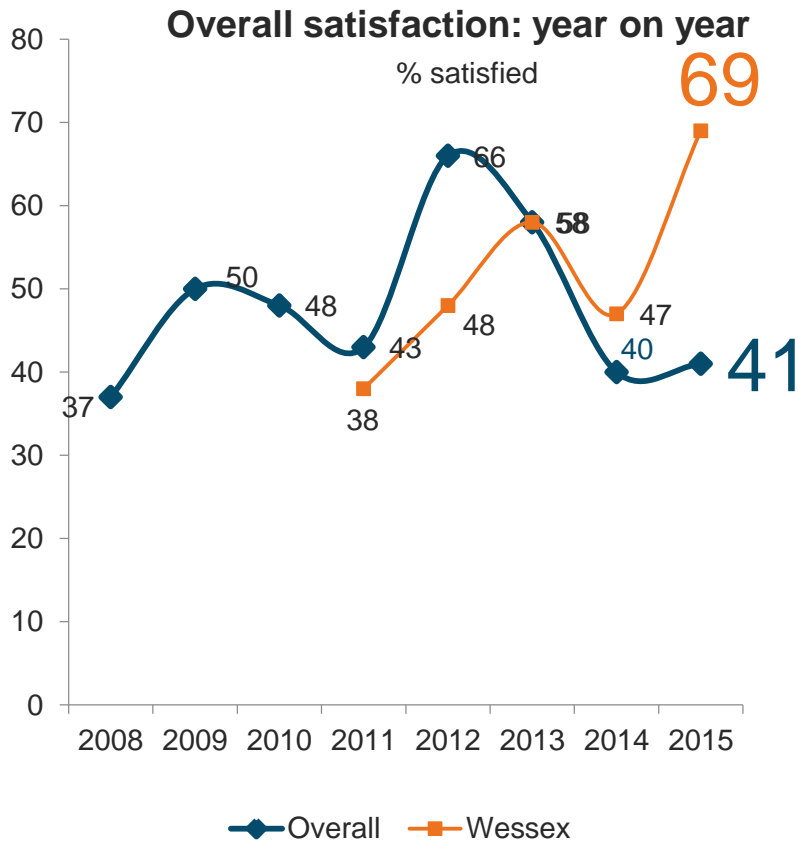
Q21. How satisfied or dissatisfied are you with Network Rail performance with respect to...?

* 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

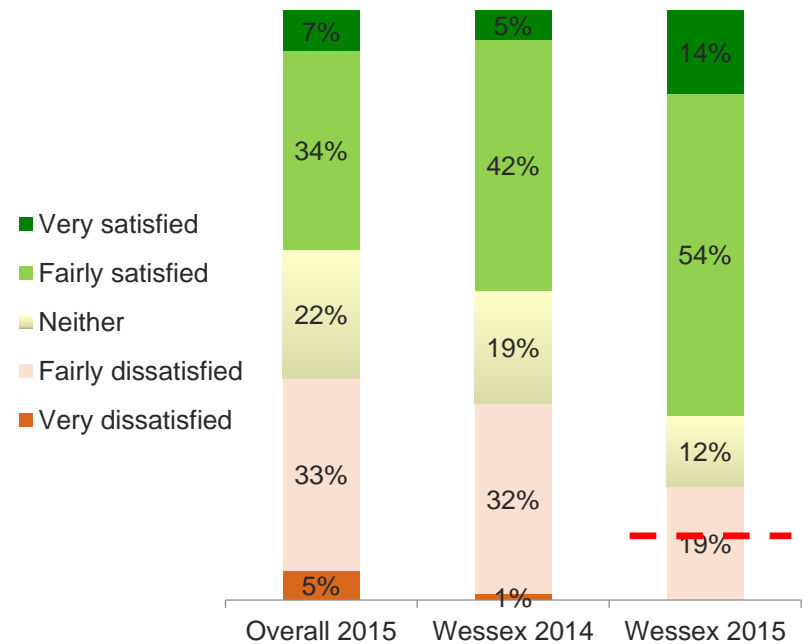
Overall satisfaction has increased by 22%pts this year, with a 9%pts increase in those 'very satisfied'



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?

Wessex overall satisfaction: response breakdown compared with previous year

Mean = 3.05 Mean = 3.16 Mean = 3.64



NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL

Reasons for overall satisfaction/dissatisfaction

69%

of Wessex customers claim to be satisfied.
The key reasons are **strong collaborative relationships, understanding customer needs**

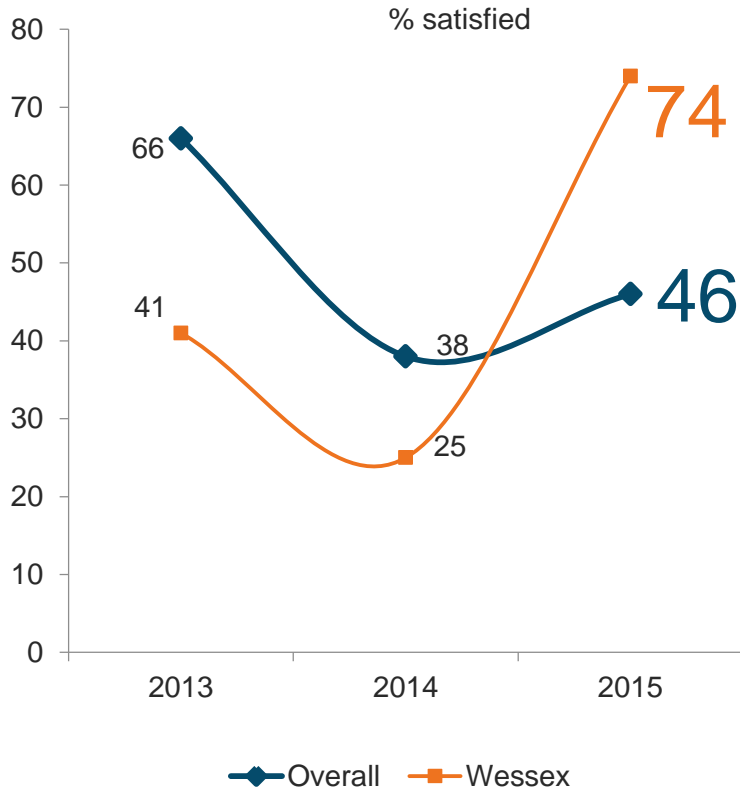
19%

of Wessex customers claim to be dissatisfied.
The key reasons are **lack of customer focus, poor communication and infrastructure issues**

Route satisfaction

Route satisfaction has increased by 49%pts since 2014, and satisfaction on the Wessex route is 28%pts above the average of all routes

Route satisfaction: year on year



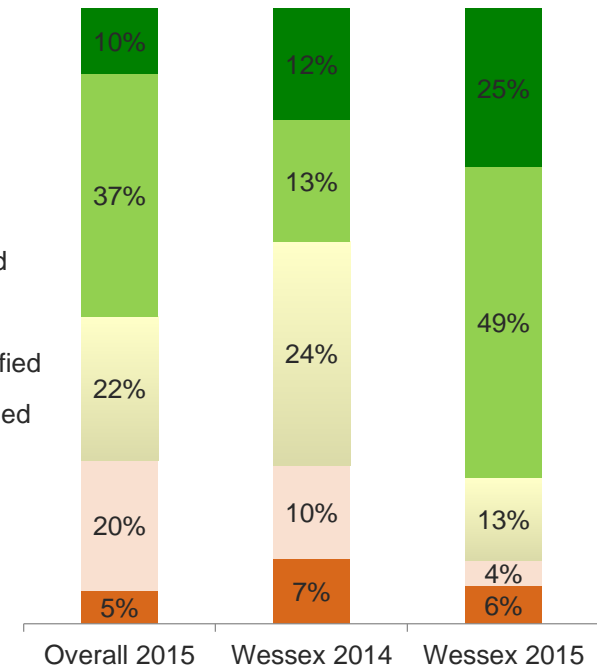
Wessex route satisfaction:

response breakdown

compared with previous year

Mean = 3.30 Mean = 3.18 Mean = 3.88

- 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

74%

of Wessex customers claim to be satisfied.
The key reasons are **good working relationships, knowledge of the route, effective communication**

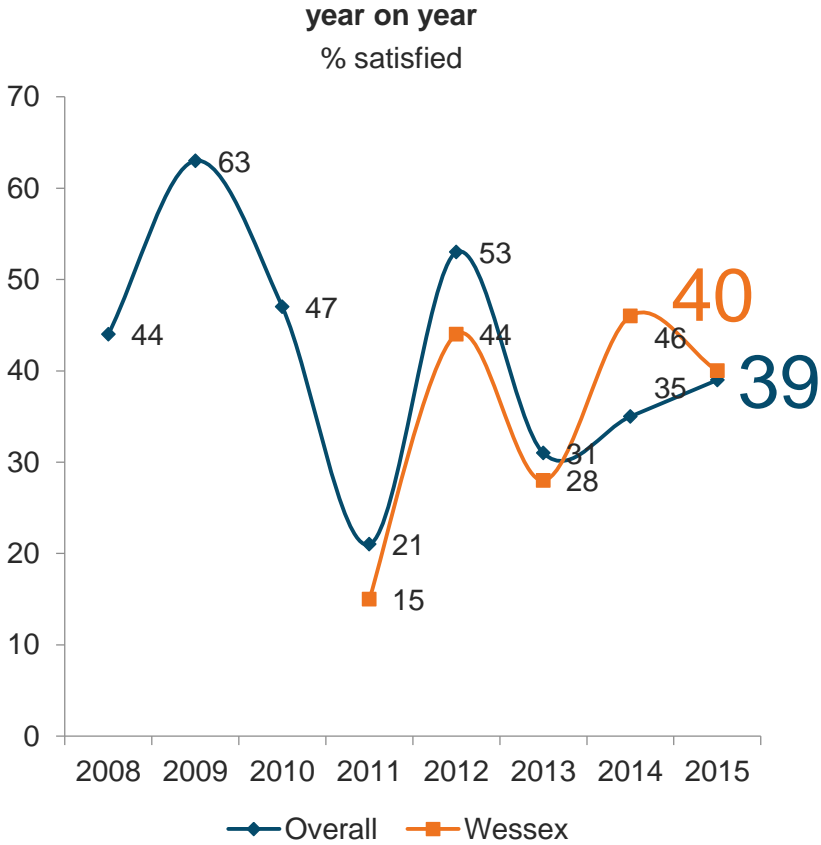
9%

of Wessex customers claim to be dissatisfied.
The key reasons are **unresponsiveness, poor communication, lack of empowered NR representatives**

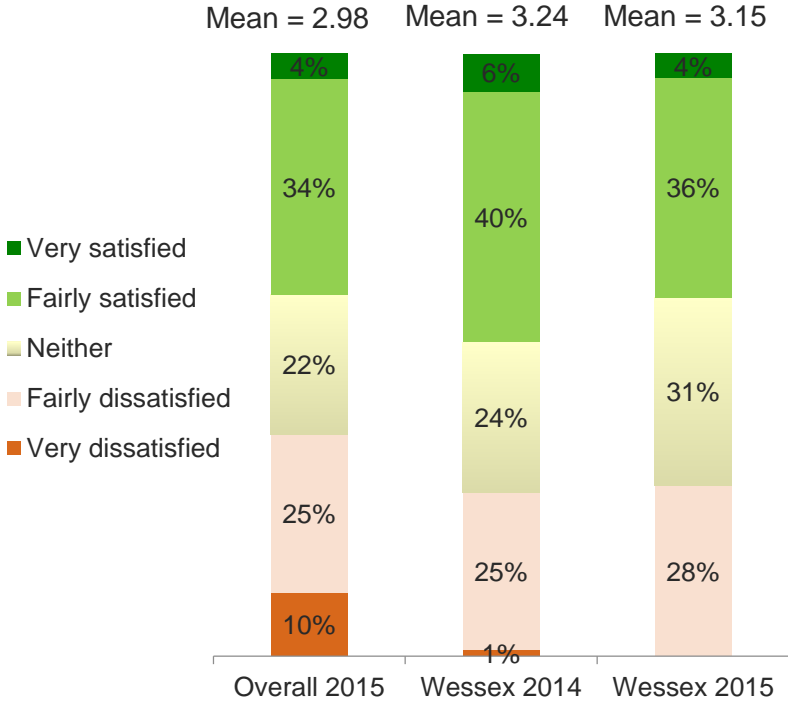
Overall train service performance

Satisfaction with train service performance has dropped this year and is now in line with overall national average

Satisfaction with train service performance:



Wessex 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

Wessex customers believe Network Rail **needs to improve** on train service performance for the following key reasons:

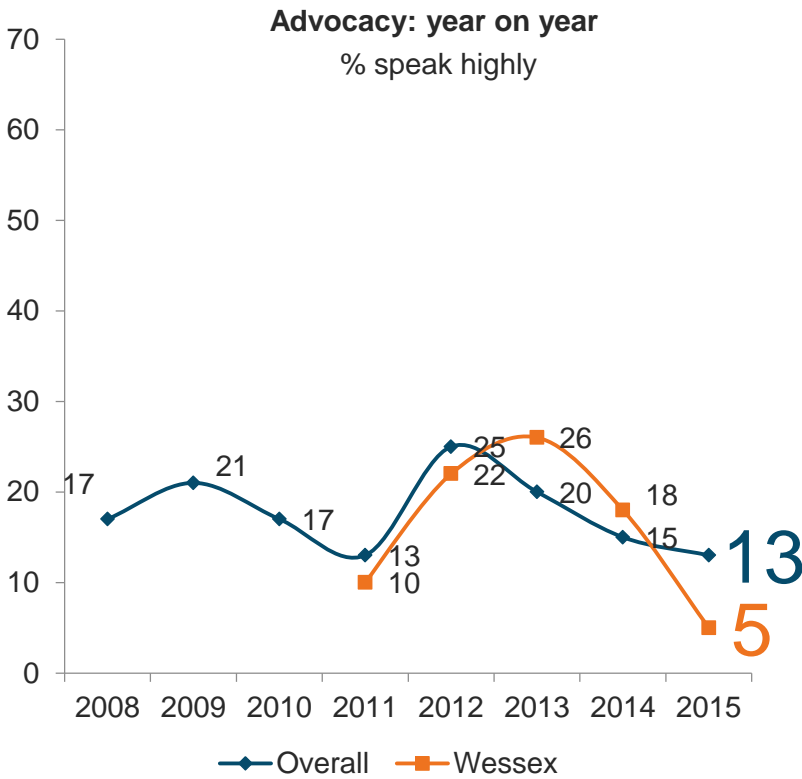
Inability to complete engineering works on time, delays

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?

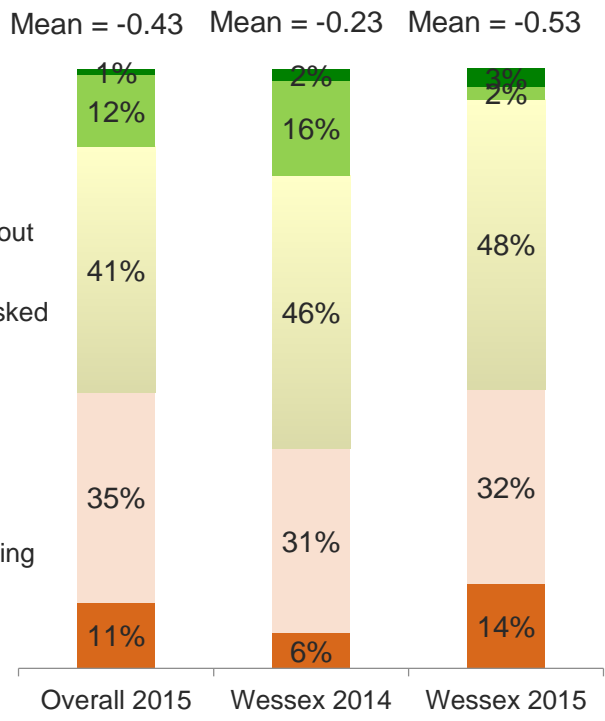
Q5/Q6 If neutral/dissatisfied at Q4: You said that you were [neutral/dissatisfied] with Network Rail's [attribute selected], what could Network Rail do to make you satisfied in this area?

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

Advocacy continues to decline with only 5% of Wessex customers who would speak highly of Network Rail



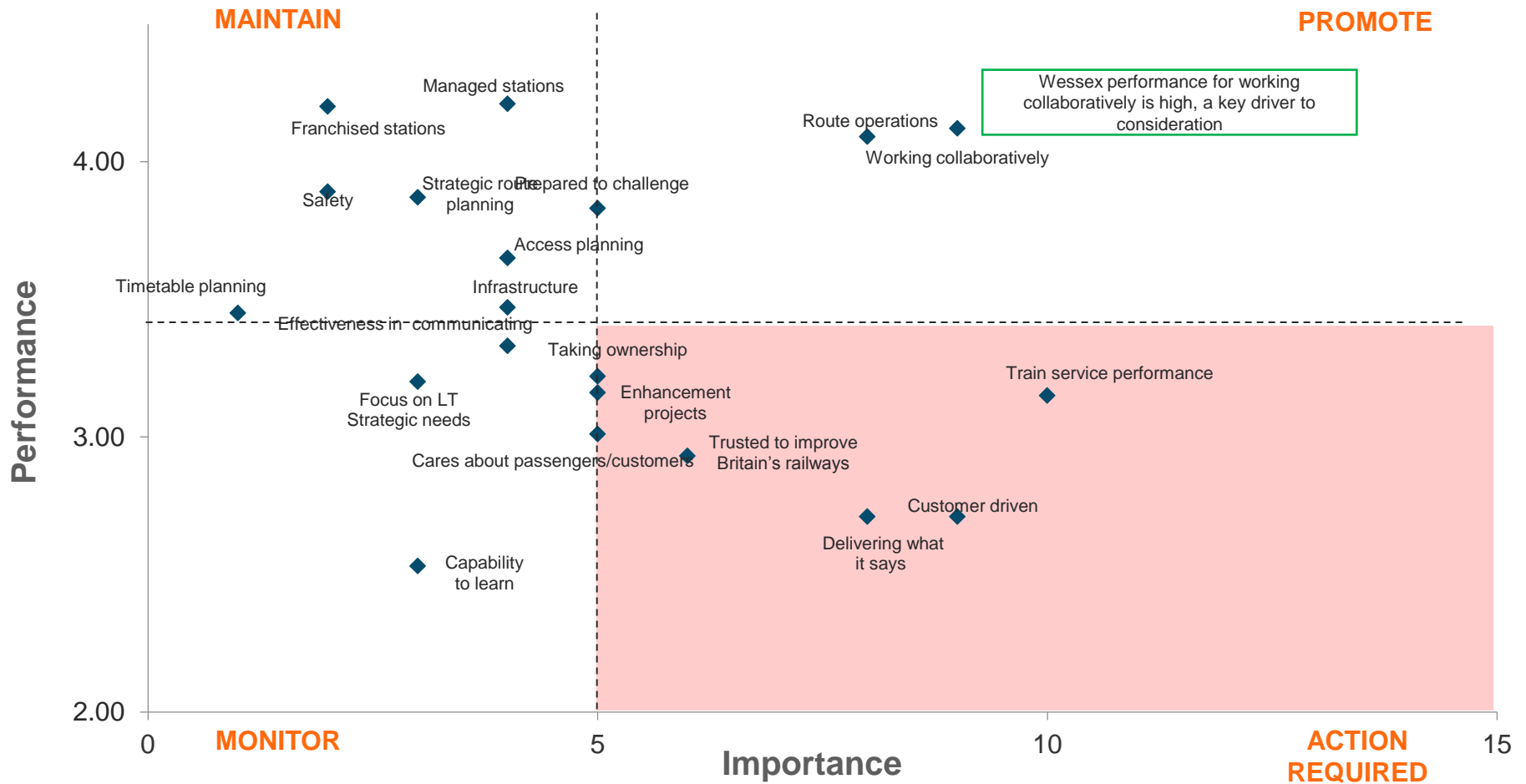
Wessex advocacy - response breakdown compared with previous year



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

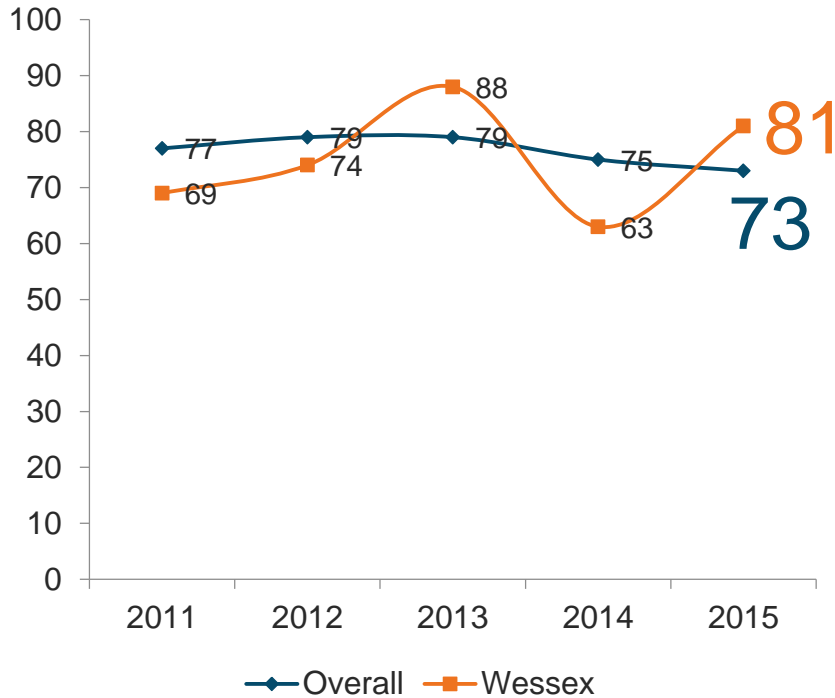
Drivers of satisfaction against route performance: Wessex



Satisfaction with safety

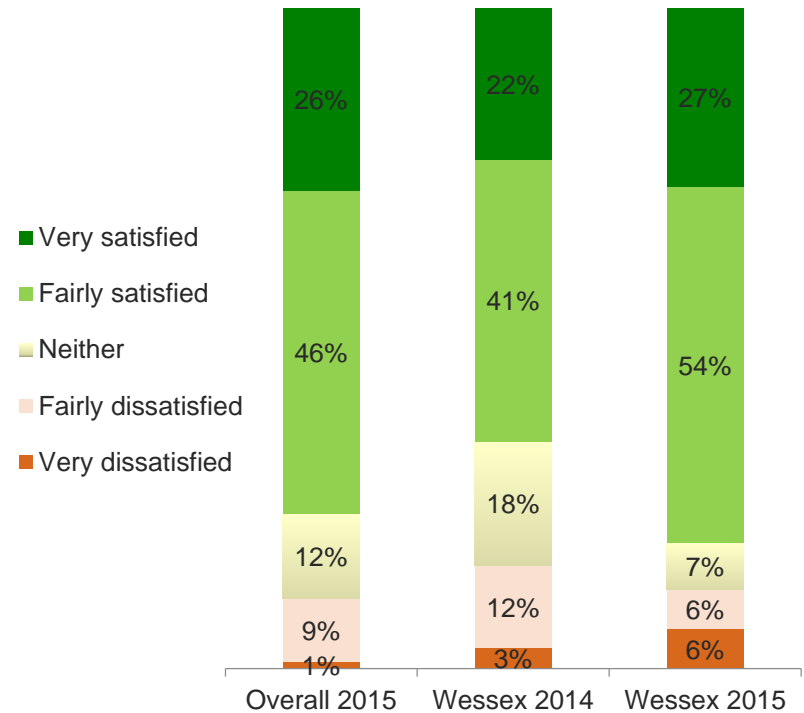
Satisfaction with safety on the Wessex route has increased by 18%pts this year. However, it should be noted that the proportion of 'very dissatisfied' customers is higher than the national average

Satisfaction with safety:
year on year
% satisfied



Wessex satisfaction with safety - response breakdown compared with previous year

Mean = 3.92 Mean = 3.71 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

81%

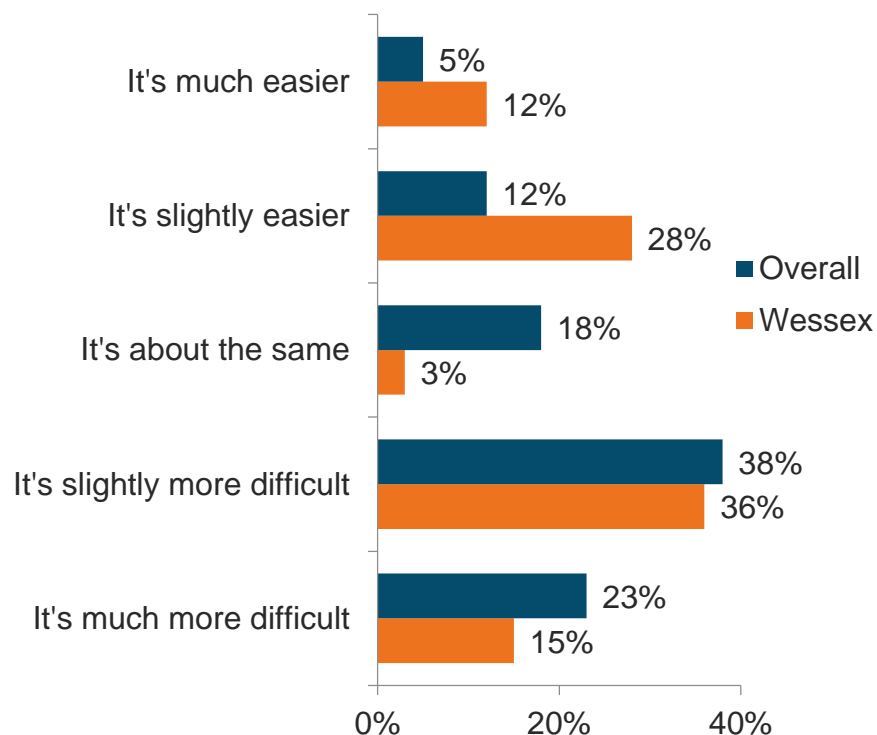
of Wessex customers claim to be satisfied with safety. The key reasons are **visibility that safety is considered in decision making, staff are safety conscious**

12%

of Wessex customers claim to be dissatisfied with safety. The key reasons are **lack of leadership and minimal control of contractors**

Working with Network Rail compared to other organisations

A higher proportion of customers on the Wessex route find it easier to work with Network Rail than the national average, with 12% finding it much easier



















































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 2014	Overall satisfaction		Route satisfaction		Train Performance		Advocacy	
			2015	2014/2015	2015	2014/2015	2015	2014/2015	2015	2014/2015
				+/-		+/-		+/-		+/-
	Overall Route Score	Total	3.64	48.00	3.88	0.70	3.15	-0.09	-0.53	-0.30
TOC	CrossCountry	2%	2.00	-0.80	2.50	-0.10	2.20	-0.05	-1.00	-0.40
	East Midlands Trains	<1%	2.00	N/A	4.00	N/A	2.00	N/A	-1.00	N/A
	GTR	6%	3.00	N/A	2.00	N/A	1.00	N/A	-2.00	N/A
	GWR	8%	3.00	-0.20	3.67	0.27	3.00	0.00	-0.33	-0.33
	London UG	1%	4.00	1.00	3.00	0.00	4.00	1.33	0.00	0.67
	South West Trains	81%	3.73	N/A	3.93	N/A	3.13	N/A	-0.60	N/A
FOC	Colas	<1%	3.75	-0.25	4.00	-1.00	3.50	0.00	0.00	-0.50
	DB Schenker	1%	3.63	0.38	3.50	0.39	3.75	0.00	0.00	0.19
	DirectRail Services	<1%	2.71	-0.29	3.00	0.00	2.71	-0.39	-0.57	-0.17
	Freightliner Ltd	1%	4.00	1.50	4.14	0.97	4.09	1.34	0.33	1.46
	Freightliner HH	<1%	3.86	1.06	4.00	0.00	4.14	0.39	0.29	0.09
	GB Railfreight	<1%	3.00	-1.00	2.75	-0.39	3.20	-0.36	-0.20	-0.53
	DCR	<1%	5.00	1.00	5.00	0.00	4.00	0.00	2.00	-2.50
	West Coast Rail	<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
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...?