


Network Rail 2015 Customer Survey Report

Route Report: Western

Prepared by: 

December 2015

Contents

- Methodology and sample
- Route summary
- Route compared with overall findings
- Route key scores
- Additional findings
- Appendix



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)
- 77 customers chose to answer about Western.

Route Summary

Summary

Key Findings

- Overall satisfaction with Network Rail and Route satisfaction have seen notable declines since last year.
- Despite these declines, train service performance has remained stable, but is lower than the overall average.
- In terms of customer service attributes, 'Working collaboratively', 'focus on long term needs' and 'taking ownership' perform notably lower than the overall average.
- Western is below the overall average across all activity areas.

Action Areas

1. Train service performance, should be a key area of focus
2. Being customer driven has a low performance score but has a large impact in driving overall satisfaction
3. Whilst safety is in line with the national average, this has declined since last year

27% Overall Satisfaction

Overall satisfaction has seen a significant decrease this year (-19% points)

25% Route Satisfaction

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

26% Train Service Performance

Train service performance has not changed from last year and is markedly below the overall average of 39%.

11% Advocacy

Advocacy has remained low and stable since last year.

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

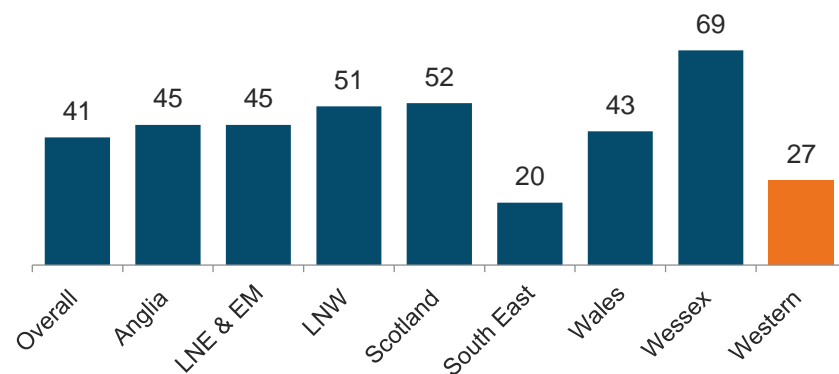
Route compared with overall findings

Key scores

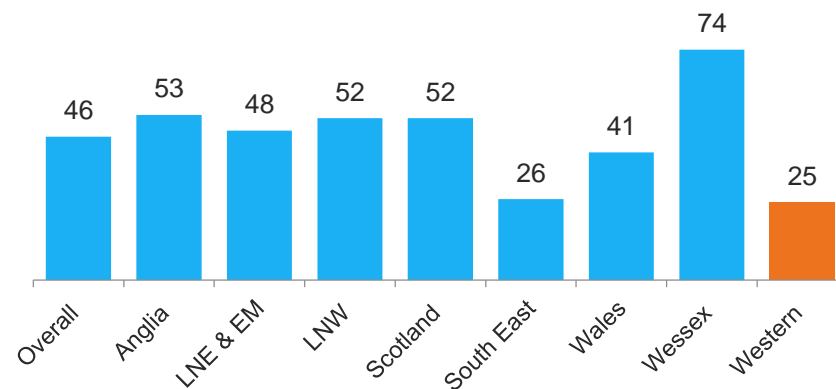
Overall and route satisfaction have seen large declines for the Western route this year. Western performs the weakest of the routes for route satisfaction

Overall satisfaction
% satisfied

% change
since
2014



Route satisfaction
% satisfied



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

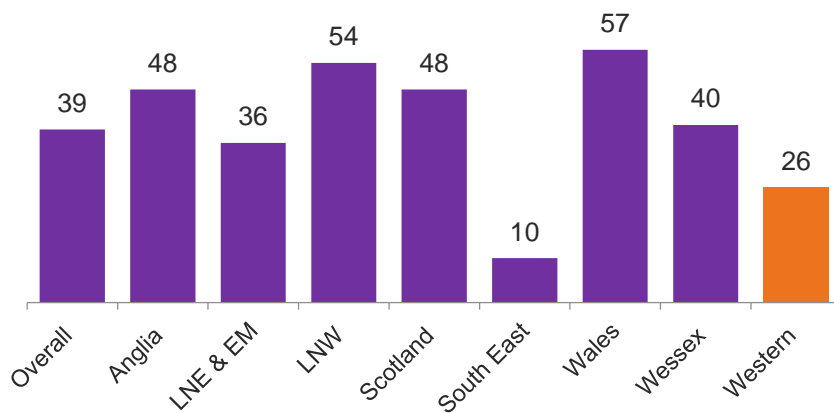
Key scores

Satisfaction with train service performance has remained stable since last year.
Advocacy has seen a marginal decline

Satisfaction with train service performance
% satisfied

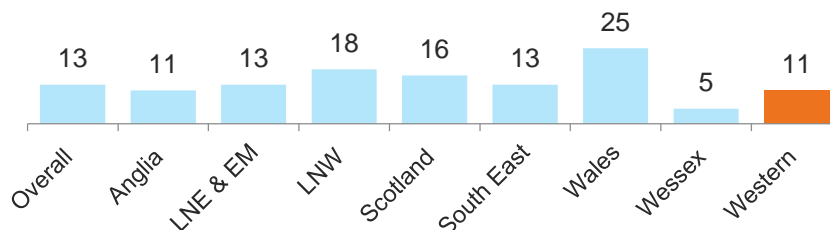
% change
since
2014

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



Advocacy
% would speak highly

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



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

Customer service attributes satisfaction

Western performs below national average for the majority of attributes, in particular for collaborative working. Customer driven and cares about rail passengers have low satisfaction scores

Overall versus Route: % satisfied

| | Overall | Western | Gap* |
|--|---------|---------|------|
| Works collaboratively | 53 | 27 | -26 |
| Prepared to challenge | 53 | 55 | +2 |
| Effective communication | 42 | 37 | -5 |
| Focus on long term strategic needs | 33 | 19 | -14 |
| Takes ownership | 37 | 22 | -15 |
| Learns and applies lessons learnt | 21 | 20 | -1 |
| Customer driven | 19 | 14 | -5 |
| Delivers what it says | 22 | 16 | -6 |
| Cares about rail passengers | 22 | 15 | -7 |
| Can be trusted to improve Britain's railways | 27 | 20 | -7 |

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

Western performs notably below national average on all activity areas, with a particularly low satisfaction score for managed stations at only 6%

Overall versus Route: % satisfied

| | Overall | Western | Gap* |
|---|---------|---------|------|
| Route operations | 42 | 27 | -15 |
| Strategic Route planning | 32 | 22 | -10 |
| Managed stations | 31 | 6 | -25 |
| Franchised stations and depots | 26 | 12 | -14 |
| Delivery of enhancements projects | 21 | 15 | -6 |
| Timetable planning | 24 | 15 | -9 |
| Infrastructure maintenance and renewals | 26 | 11 | -15 |
| 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

Dissatisfaction has increased by 40% pts this year and satisfaction has declined to 14% pts below national average



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?

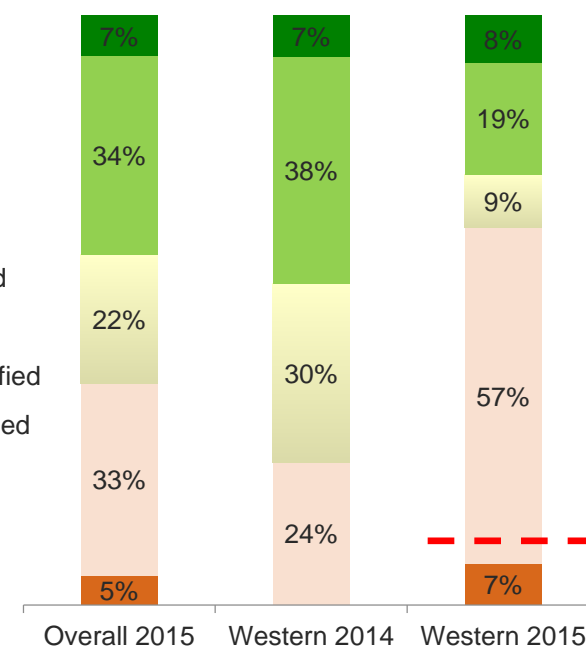
Western overall satisfaction:

response breakdown

compared with previous year

Mean = 3.05 Mean = 3.28 Mean = 2.64

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



NET DISSATISFACTION SHOULD NOT EXCEED 15% AT ROUTE LEVEL

Reasons for overall satisfaction/dissatisfaction

27%

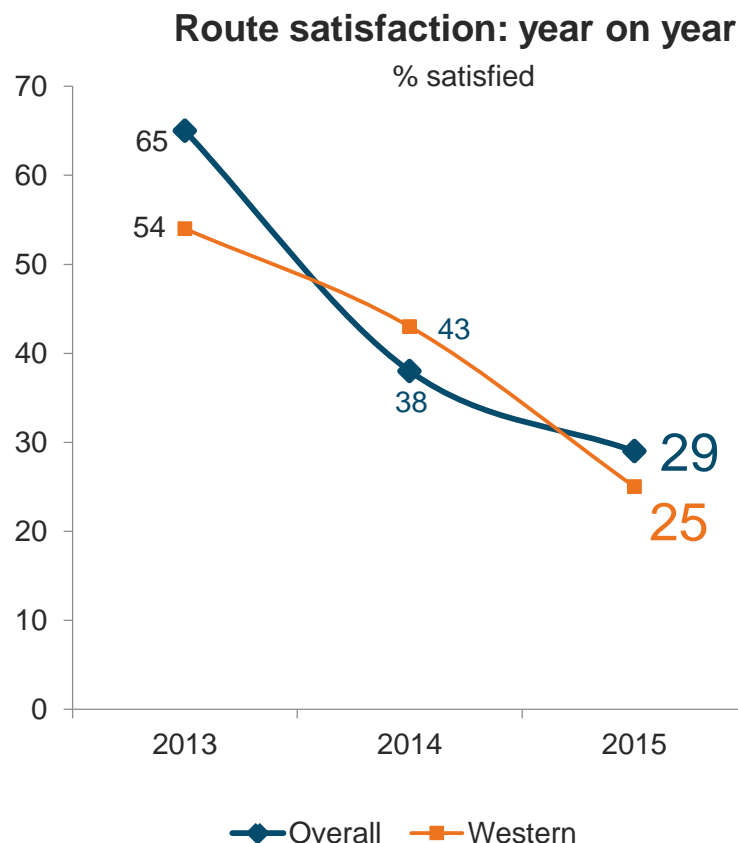
of Western customers claim to be satisfied.
The key reasons are **strong relationships with NR representatives, delivering what they say they will**

64%

of Western customers claim to be dissatisfied.
The key reasons are **poor planning, lack of engagement, targets unmet, late delivery**

Route satisfaction

Satisfaction on the Western route continues to decline and dissatisfaction has increased to **45%**



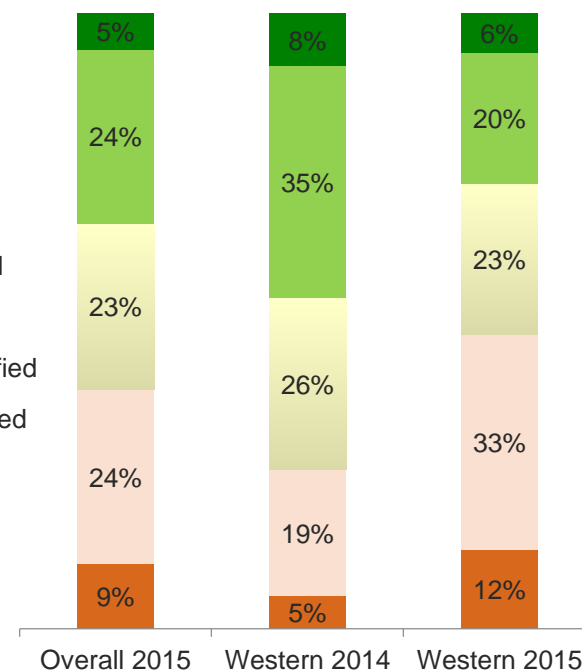
Western route satisfaction:

response breakdown

compared with previous year

Mean = 2.89 Mean = 3.25 Mean = 2.72

- 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

25%

of Western customers claim to be satisfied.
The key reasons are **good relationships with the route team, engagement, understanding customer needs**

45%

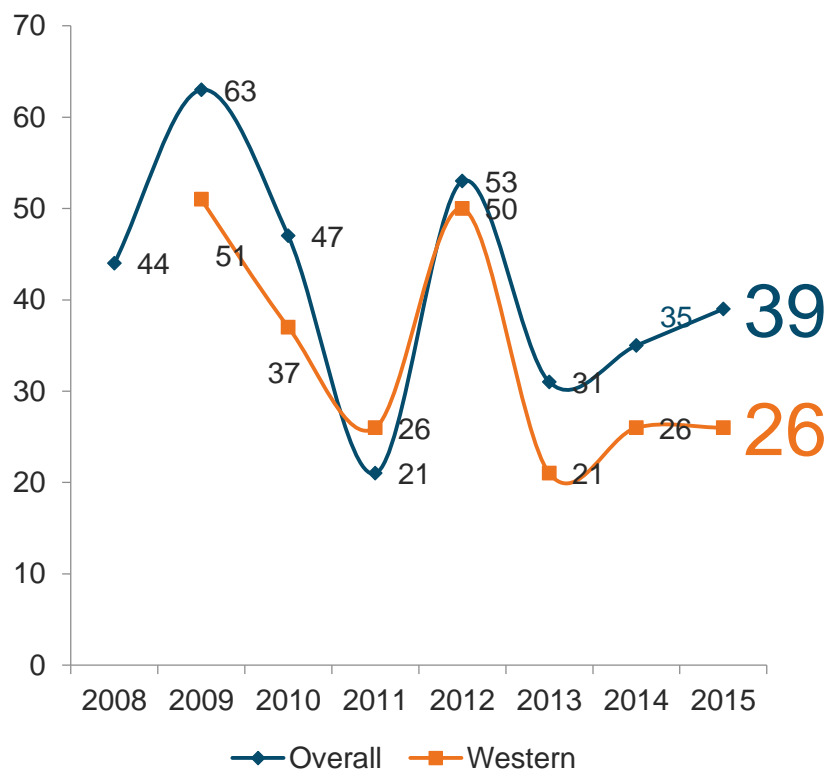
of Western customers claim to be dissatisfied.
The key reasons are **unreliable infrastructure, inability to learn, lack of accountability**

Overall train service performance

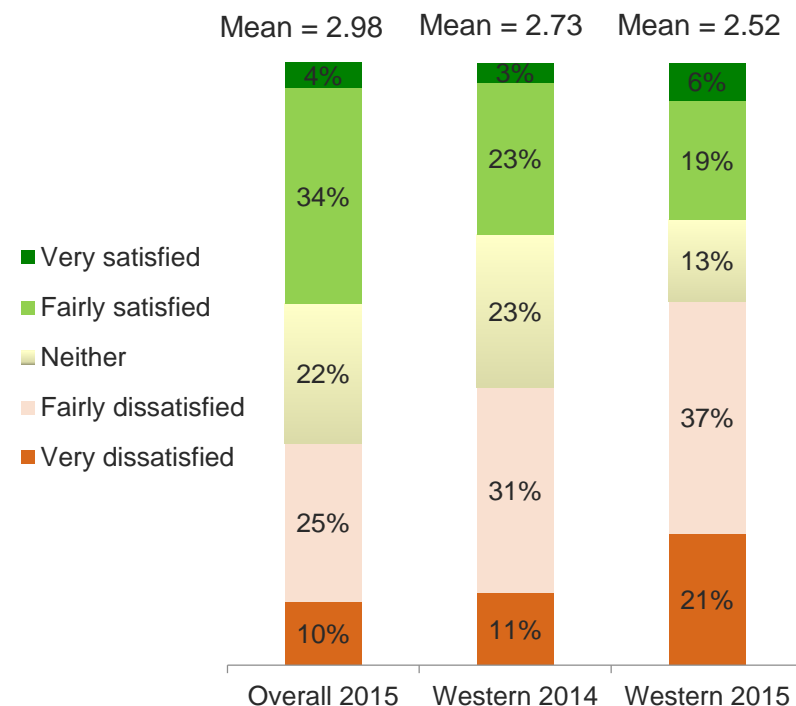
Whilst satisfaction remains stable, dissatisfaction has increased to **58%** this year

Satisfaction with train service performance:

year on year
% satisfied



Western 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

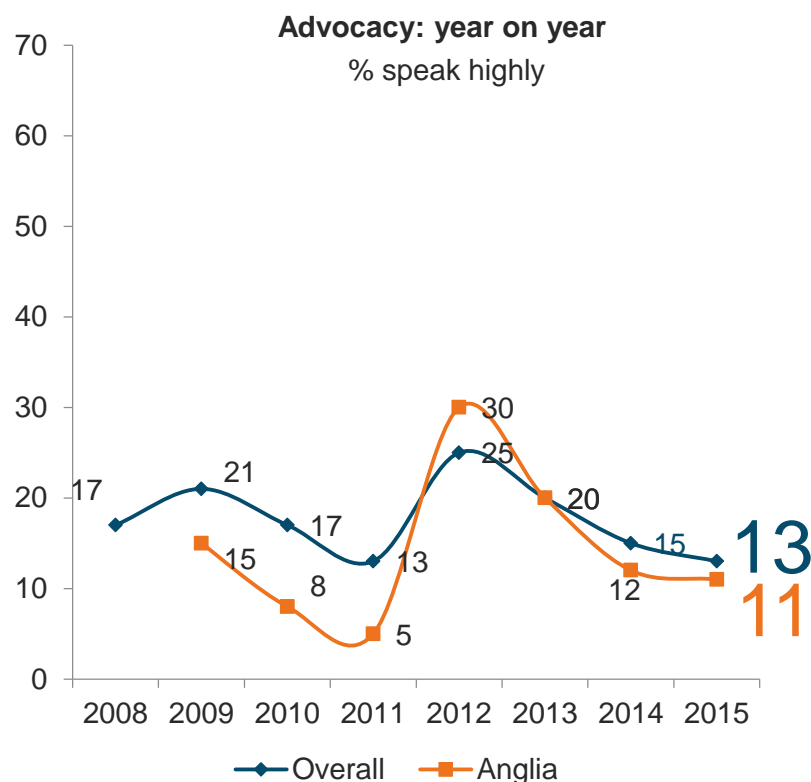
Customer perspective on train service performance

Western customers believe Network Rail **needs to improve** on train service performance for the following key reasons:
poor planning, poor response to infrastructure failures

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*

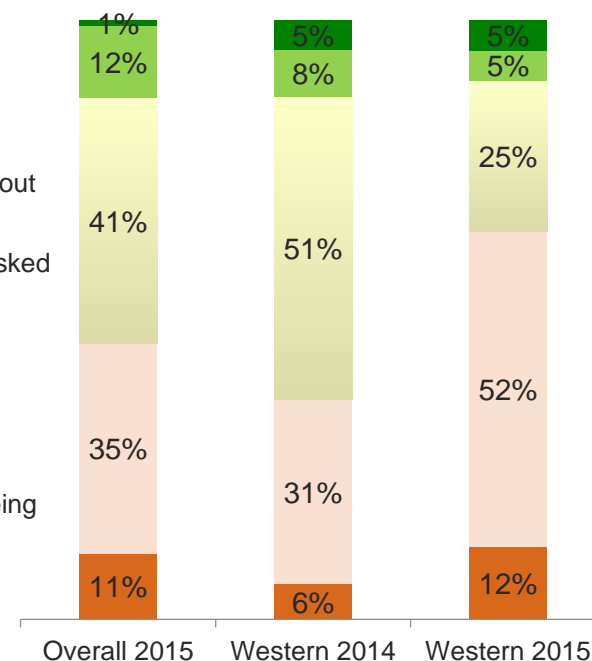
The proportion of respondents who would speak critically of Network Rail has increased by **27% pts** this year



Western advocacy - response breakdown compared with previous year

Mean = -0.43 Mean = -0.26 Mean = -0.61

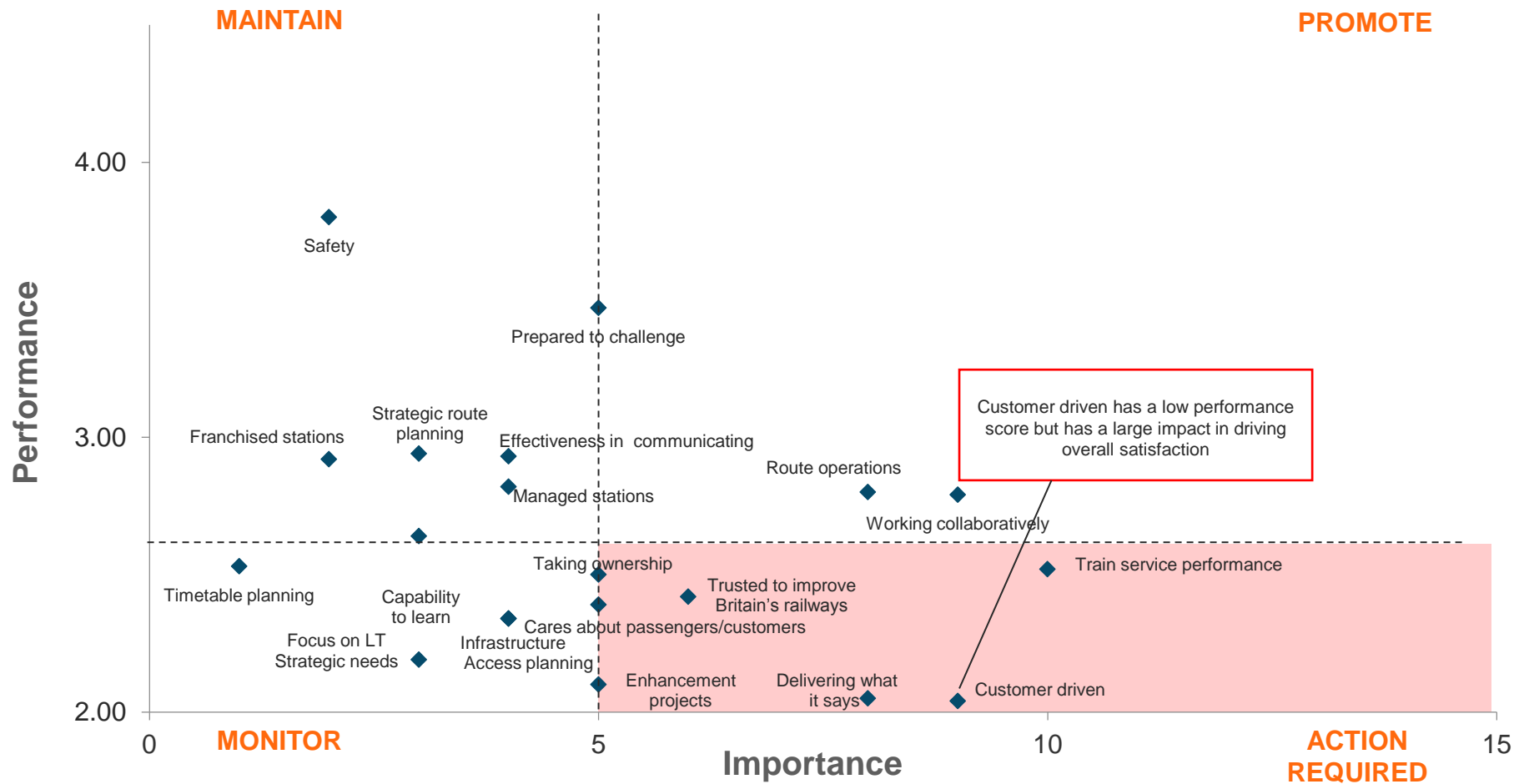
- Speak highly without being asked
- Speak highly, if asked
- Neutral
- Critical if asked
- Critical without being asked



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

Additional findings

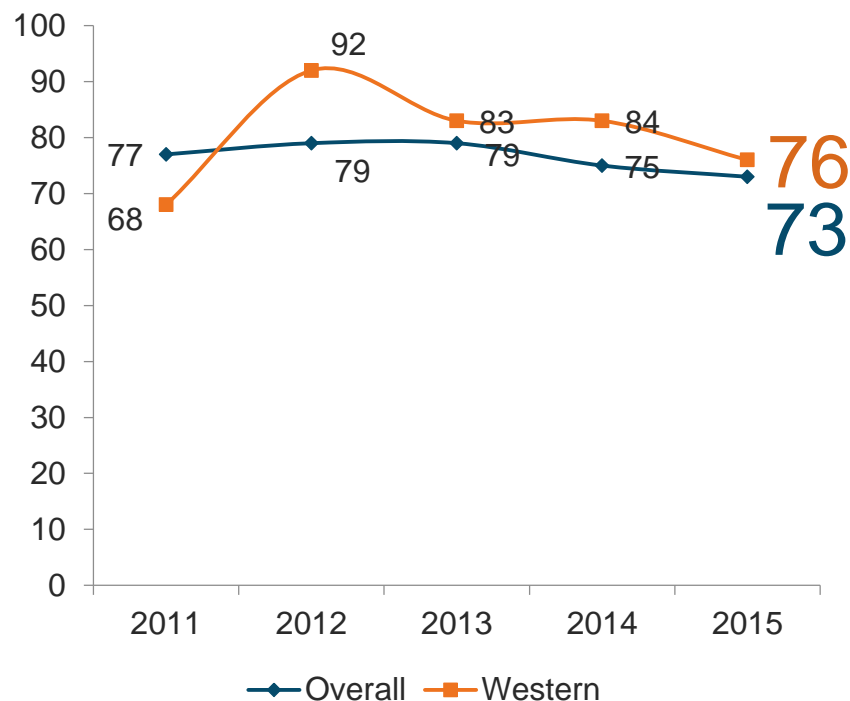
Drivers of satisfaction against route performance: Western



Satisfaction with safety

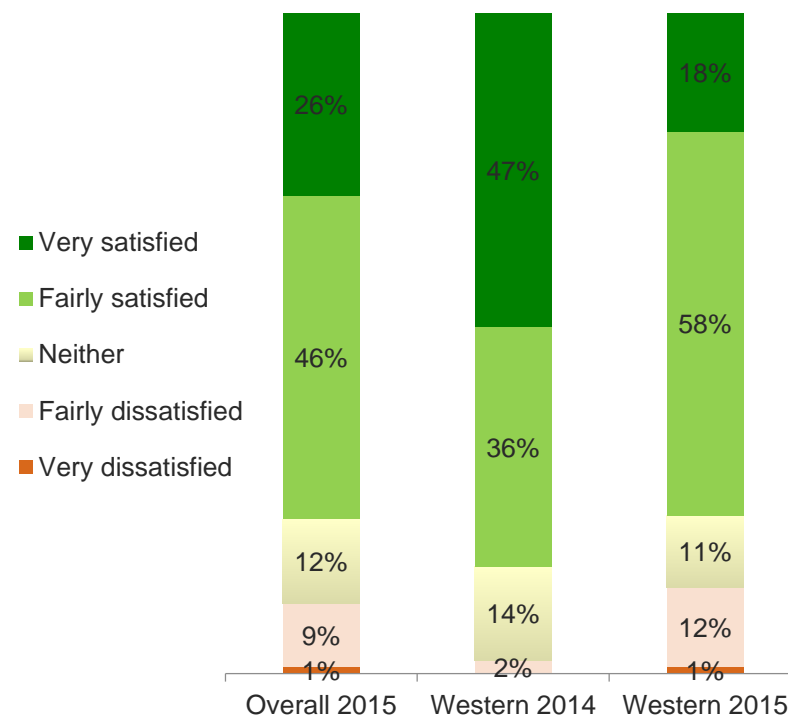
The proportion of 'very satisfied' customers has decreased by **29% pts** this year, and dissatisfaction has increased by **11% pts**.

Satisfaction with safety:
year on year
% satisfied



Western satisfaction with safety - response breakdown compared with previous year

Mean = 3.92 Mean = 4.29 Mean = 3.8



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

76%

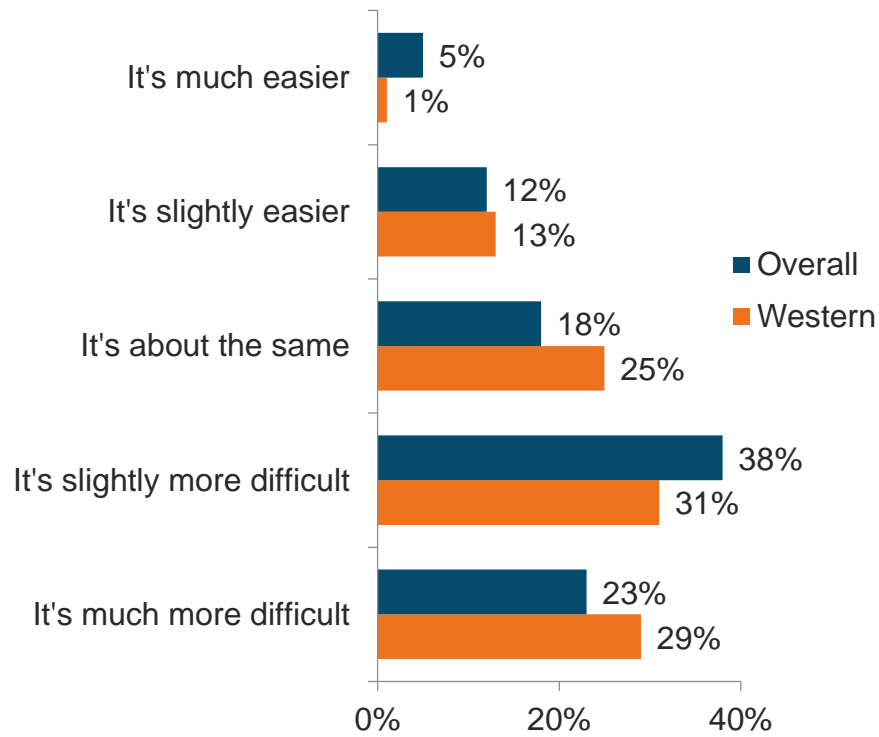
of Western customers claim to be satisfied with safety. The key reasons are **Network Rail making safety a clear priority, discussing and resolving safety issues**

13%

of Western customers claim to be dissatisfied with safety. The key reasons are **specific safety incidents, poor decisions made around safety**

Working with Network Rail compared to other organisations

















































A lower proportion find it much easier to work with Network Rail, and customers on the Western route are more likely to find it 'much more difficult' than the national average























































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 | 2.64 |  -0.64 | 2.72 |  -0.53 | 2.52 |  -0.21 | -0.61 |  -0.35 |
| TOC | Chiltern Railways | 0% | 5.00 | N/A | 2.00 | N/A | 4.00 | N/A | 1.00 | N/A |
| | CrossCountry | 17% | 2.63 |  -0.37 | 3.14 |  -0.29 | 2.71 |  -0.09 | -0.63 |  -0.06 |
| | GWR | 69% | 2.47 |  -0.86 | 2.53 |  -0.61 | 2.27 |  -0.30 | -0.73 |  -0.53 |
| | Heathrow Exp | 3% | 3.00 |  -1.20 | 2.75 |  -0.85 | 2.33 |  -0.87 | -0.20 |  -0.60 |
| | London Midlands | 2% | 2.00 |  -1.33 | 3.00 |  -0.67 | 4.00 |  0.67 | 0.00 |  0.67 |
| | London UG | <1% | 4.00 |  0.00 | 4.00 |  1.00 | 4.00 |  1.00 | 0.00 |  0.00 |
| | South West | <1% | 4.00 | N/A | 2.00 | N/A | 4.00 | N/A | -1.00 | N/A |
| FOC | Colas | <1% | 3.75 |  -0.25 | 4.67 |  -0.33 | 3.50 |  0.00 | 0.00 |  -0.50 |
| | DB Schenker | 5% | 3.63 |  0.38 | 3.00 |  -0.27 | 3.75 |  0.00 | 0.00 |  0.19 |
| | DirectRail Services | <1% | 2.71 |  -0.29 | 3.00 |  -0.40 | 2.71 |  -0.39 | -0.57 |  -0.17 |
| | Freightliner Ltd | 2% | 4.00 |  1.50 | 3.86 |  0.06 | 4.09 |  1.34 | 0.33 |  1.46 |
| | Freightliner Heavy Haul | <1% | 3.86 |  1.06 | 3.83 |  0.08 | 4.14 |  0.39 | 0.29 |  0.09 |
| | GB Railfreight | <1% | 3.00 |  -1.00 | 3.25 |  -0.61 | 3.20 |  -0.36 | -0.20 |  -0.53 |
| | DCR | <1% | 5.00 |  1.00 | 2.00 |  -2.00 | 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 | |
|-------------------------|------------------|-------|----------------------------|-------|------------------------------|-------|------------------|-------|-----------------|-------|--------------------|-------|--------------------------|-------|--------------------------|-------|
| | 2014/15 | | 2014/15 | | 2014/15 | | 2014/15 | | 2014/15 | | 2014/15 | | 2014/15 | | 2014/15 | |
| | 2015 | +/- | 2015 | +/- | 2015 | +/- | 2015 | +/- | 2015 | +/- | 2015 | +/- | 2015 | +/- | 2015 | +/- |
| 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...?