



OFFICE OF RAIL REGULATION

# Rail Passenger Satisfaction Benchmarking

## Report on ONS Opinions and Lifestyle Survey

April 2014

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# 1. Executive summary

1.1 The Office of Rail Regulation commissioned a module within the April 2013 Office of National Statistics Opinions and Lifestyle survey which allows the benchmarking of rail services against similar services in Great Britain.

1.2 The questions covered five comparative services, electricity services, internet services, bank services, mobile phone services, and air travel. Each respondent was not required to answer questions on all of these utilities instead one of the comparator services was randomly chosen per respondent. The answers for each of the five services were also combined to provide an overall “all comparator services” score.

1.3 In addition to benchmarking service overall, the survey asked questions on satisfaction based on different elements of service provision including: value for money, information availability, ease of contact; fairness and transparency of charges, dependability and reliability, and ease of getting the best price.

1.4 Assessment of the survey results show:

- Satisfaction with rail services overall is better than for electricity but worse than the four other comparator services;
- Rail services score least well when benchmarked against mobile phone and air travel services;
- Rail services score most favourably against comparator services in relation to satisfaction with information availability, with rail also scoring well in relation to the friendliness and helpfulness of staff and the dependability and reliability of the service; and
- Rail services score least well when benchmarking comparator services in relation to satisfaction with the ease of contact and the value for money, with rail scoring worse than all the comparator services for these two categories.

## 2. Introduction and background

### Introduction

2.1 The last ten years has seen large growth in the number of passenger journeys being made on the mainline railway in Great Britain (“GB”). Total franchised passenger journeys increased 53.9% from 975.5 million in 2002-03 to 1,501.7 million in 2012-13.<sup>1</sup> During the same period of time results of the Passenger Focus National Rail Passenger Survey show that passenger satisfaction improved with an increase in overall satisfaction at the National Level from 72 the spring 2002 survey to 82 in the spring 2013 survey.<sup>2</sup>

2.2 Whilst long term growth in rail use and passenger satisfaction suggests increasingly successful delivery of the rail services it is important to understand the position of rail in the wider economy in Great Britain as well as its position compared to rail industries in other countries.

2.3 One part of ORR’s vision stated in the five year corporate strategy is that *“satisfaction levels of passenger and freight customers’ are equivalent to the best in railways and other forms of transport”*. In order to know when that has been achieved, ORR needs to understand what high levels of satisfaction actually mean, what levels of satisfaction with GB mainline railways and other services are realistically achievable and hence when “best in class” satisfaction levels have been achieved.

2.4 The ORR therefore committed to benchmarking rail services against other countries and other services within Great Britain, the latter of which is presented in this report.

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<sup>1</sup> ORR National Rail Trends [Passenger journeys by sector – table](#)

<sup>2</sup> Passenger Focus [National Rail Passenger Survey](#)

## 3. Omnibus survey

### The Office of National Statistics omnibus survey

3.1 In order to collect reliable, comparable and relevant data on satisfaction within the rail industry and with other utilities, the ORR commissioned the inclusion of a number of questions in The Office of National Statistics (ONS) omnibus survey, called Opinions and Lifestyle (formally Opinions).<sup>3</sup> The monthly, multipurpose social survey provides quick and reliable information about topics of immediate interest, specialising in asking research questions on topics too brief to warrant full surveys of their own.

3.2 The questions posed by the ORR were included in the April 2013 omnibus survey which uses a random probability sample stratified by region, covering Great Britain, excluding the Isle of Scilly and the Scottish Highlands and Islands, to identify a sample of households eligible for the survey. The survey provided a sample of 1,813 eligible households, of which there was a completion rate of 1,031, representing a 57% response rate. Further details on the survey sample and survey methodology can be found in the accompanying technical report.

3.3 The rail service module of the omnibus survey included a series of questions which were supplied by ORR to enable benchmarking of passenger satisfaction in the rail industry against other utilities in Great Britain. The rail questions and sample classification questions can be found in the technical report.

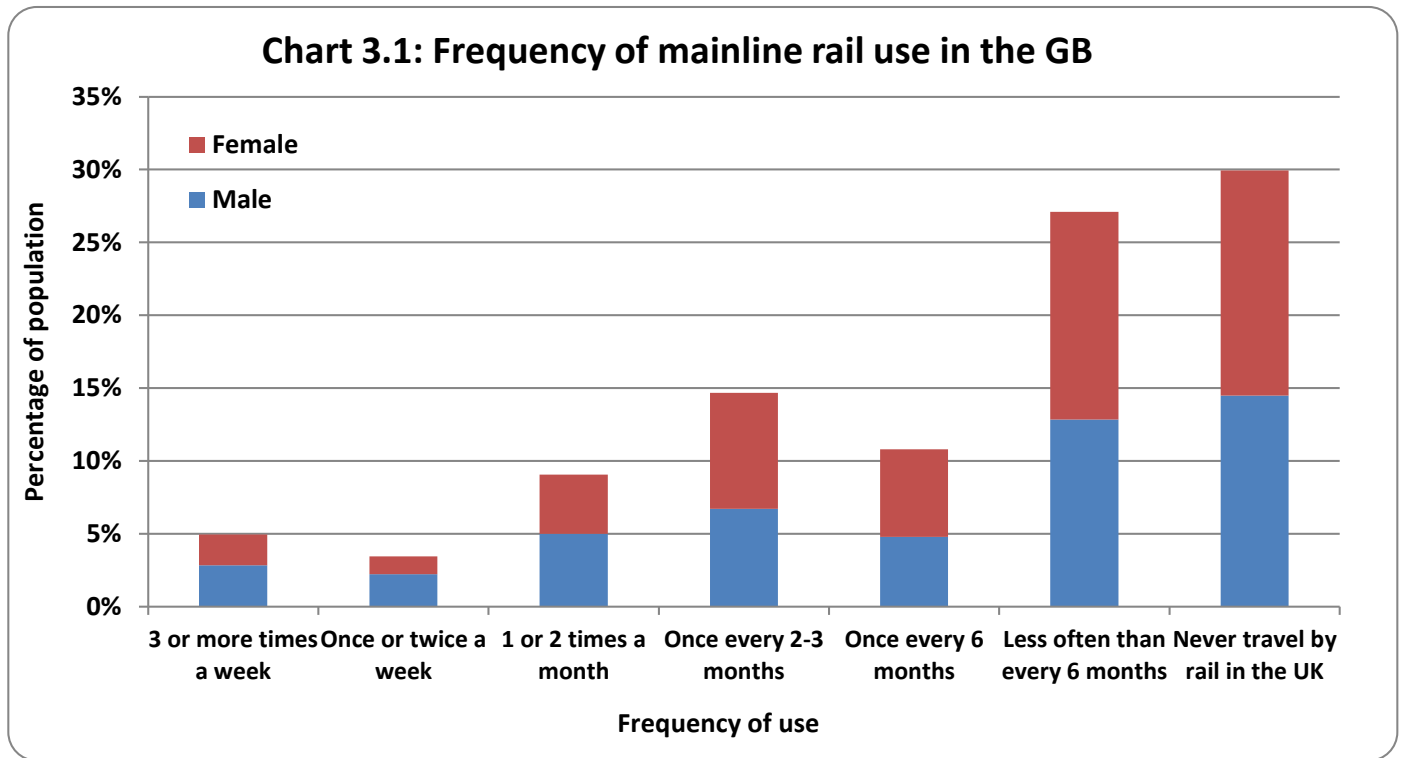
3.4 The comparator utilities chosen to benchmark rail passenger satisfaction against were electricity services, internet services, banking services, mobile phone providers and air travel services. Each respondent was not required to answer questions on all of these utilities instead one of the comparator services was randomly chosen per respondent.

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<sup>3</sup> Office of National Statistics [Opinions and Lifestyle Survey](#)

## Frequency of mainline rail use

3.5 In order to understand the levels of mainline rail use, respondents were asked how often they travel by rail in the Great Britain (not including trams, metro or underground). The results of which are shown in Chart 3.1 below.



3.6 Chart 3.1 shows that 8% of the population travel by rail at least once a week whilst 30% of the population never travel by rail in GB. Of those using rail at least once a week 60% are male and 40% female.

3.7 The results of the National Travel Survey 2011 have been compared to the omnibus survey to assess its reliability. The two samples have similar numbers within the classifications of more frequent rail use (3 or more times a week through to once every 2-3 months), with differences of between zero and four percentage points. For the other, less frequent travel categories, the differences are larger; however, this could be due to differences in the categorisation between the two surveys. The National Travel Survey has two categories, compared to three in the omnibus survey, covering these levels of frequency of rail use.

3.8 The omnibus survey also revealed differences in the frequency of travel for different regions of the GB with the London, East of England and South East having the highest proportion of those traveling more than once a week and the Wales and the North West Government office regions having the highest proportion of respondents never having travelled by rail.

3.9 Those respondents, 54%, who answered the question on how often do you travel by rail with “*less often than every 6 months*” or “*never travel by rail*” were asked a supplementary question to ascertain the reasons why they have not travelled by rail in the last 6 months. Of these 65% stated that this was because they had “*no need*”, with the 27% answering that they “*prefer car/ Always use car/ Car more convenient*”. Note that the question allowed multiple responses such that the 27% answering they prefer car etc. could have also answered that they had no need to use the train.

3.10 The omnibus survey also asked respondents “*For what purposes have you travelled by rail in the last year?*” This question allowed respondents to provide more than one answer, as passengers may have travelled by rail for more than one purpose in the last year.

Table 3.1: For what purpose have you travelled by rail in the last year? (multi-coded answer)

Purpose of travel	Multi-coded*	First answer
For leisure, shopping or entertainment	70%	37%
To visit friends or relatives	42%	27%
Travel to/from work	25%	24%
For business	13%	4%
Travel to/from education	5%	8%
For personal business such as health or finance	4%	1%

\* Multi-coded answers do not sum to 100% because respondents are able to provide more than one answer

3.11 The results of the omnibus survey show that 70% of those using rail in the past year have done so “*for leisure, shopping or entertainment*” purposes. Just over a third of rail users identified leisure, shopping or entertainment first in response to the questions, suggesting that it could be their primary use. “*Travel to/from work*” was given as a purpose of travel by nearly a quarter, 25%, of those using rail in the past year with 13% also using the rail network “*for business*” travel. These two purposes accounted for 28% of first answers.

# 4. Benchmarking against comparator services

## Introduction

4.1 In order to provide a benchmark for rail services respondents were asked a series of questions to identify their level of satisfaction based on different elements of the rail industry and a comparator service. Each respondent was asked these questions about the rail industry and **one** of five comparator utilities, chosen at random. The five comparator utilities against which rail passenger satisfaction were benchmarked were electricity supplier, internet services, bank services, mobile phone services, and air travel.

4.2 The responses for each of the five comparator services have been aggregate to provide an “all comparator services” variable for overall comparison.

4.3 Table 4.1 below summaries the results of the survey showing how rail services compare with each service. A positive position is indicated when the proportion of quite or very satisfied is higher for rail than the comparator service, and a negative position is assigned when the proportion of quite or very satisfied is lower than the comparator service. Those categories shaded amber represent where the satisfaction with the comparator service is within a 5 percentage point range of satisfaction with rail services (plus/minus 2.5 percentage points).



Table 4.1: Summary of satisfaction benchmarking

Satisfaction with	Rail services benchmarked against					
	Electricity	Internet	Banking	Mobile phone	Air travel	All comparator services
Information availability	+	+	+	-	-	+
Dependability and reliability	-	+	+	-	+	-
Ease of finding the best price	+	-	+	-	-	-
Friendliness and helpfulness of staff	+	+	-	-	-	+
Ease of contacting the service provider	-	-	-	-	-	-
Fairness and transparency of charges	-	-	-	-	-	-
Value for money	-	-	-	-	-	-
<b>OVERALL SERVICE</b>	+	-	-	-	-	-

4.4 Rail services score least well when benchmarked against mobile phone services, with rail services having a negative position on all elements, although mobile phone services score only slightly more favourably when analysing satisfaction with information availability.

4.5 There are a number of differences between the mobile phone service provider and rail industry which should be considered when analysing these results. The mobile phone industry is more competitive on the supply side with the majority of consumers having greater choice of provider than when making a rail journey.

4.6 There are also demand side differences between the two services, whilst usage of both rail services and mobile phones may be frequent, there are differences in the frequency of direct contact with the provider for purchase or issue reconciliation. Approximately 70% of new mobile contracts are for a two year duration<sup>4</sup>, implying, that without the need to contact the mobile phone service provider to reconcile issues, consumers frequency of contact will be less than rail users for whom 42% purchase season tickets, and 58% for individual journeys.<sup>5</sup>

4.7 Rail services also score badly against air travel with only satisfaction with dependability and reliability scoring favourably for rail services. Air services are similar to rail services in respect of the likely frequency

<sup>4</sup> Ofcom The Consumer Experience 2012 [Chart Pack Figure 87](#)

<sup>5</sup> ORR National Rail Trends [Passenger journeys by ticket type – table](#)

of user contact with the service provider for each journey but the air industry is more competitive on the supply side, with often more choice between which airline to use for a particular journey.

4.8 In relation to the number of benchmarking elements, when benchmarked against electricity, internet and bank services rail appear more equal, with 3 elements in each of the positive and negative categories. However, rail only comes out positively at the overall service level when benchmarked against electricity services, suggesting that the ease of finding the best price and the friendliness and helpfulness of staff, have more importance than dependability and reliability in satisfaction with overall service. Although further analysis would be required to quantify this suggestion.

4.9 The Passenger Focus National Rail Passenger Survey<sup>6</sup> (NRPS) also provides a valuable source of information on passenger satisfaction with rail services. The NRPS data compliments the data from the omnibus survey to help provide wider insight into the level of satisfaction with rail services, which can be benchmarked against other services.

4.10 The National Rail Passenger Survey includes questions on a number of aspects of rail satisfaction which are comparable to the aspects covered in the omnibus survey. The differences between the two sets of data must however, be understood and taken into account when analysing the survey results.

4.11 The main difference between the two datasets is temporal scope of the questions of each survey. The opinions in the NRPS are based on the actual journey being taken by the passenger at the time of completing the survey, whereas the omnibus survey covers respondent's views of rail services in their area as a whole, covering all journeys by rail they have made. Whilst respondents are requested to form their views from all interactions with and perceptions of the services there may be some bias towards experiences of more recent dealings with the services, which are more prominent in respondent's minds.

4.12 The other significant difference between the two datasets is that the NRPS includes only rail users, whereas the omnibus survey includes the views of those who do not use rail services and therefore captures the views of the whole population.

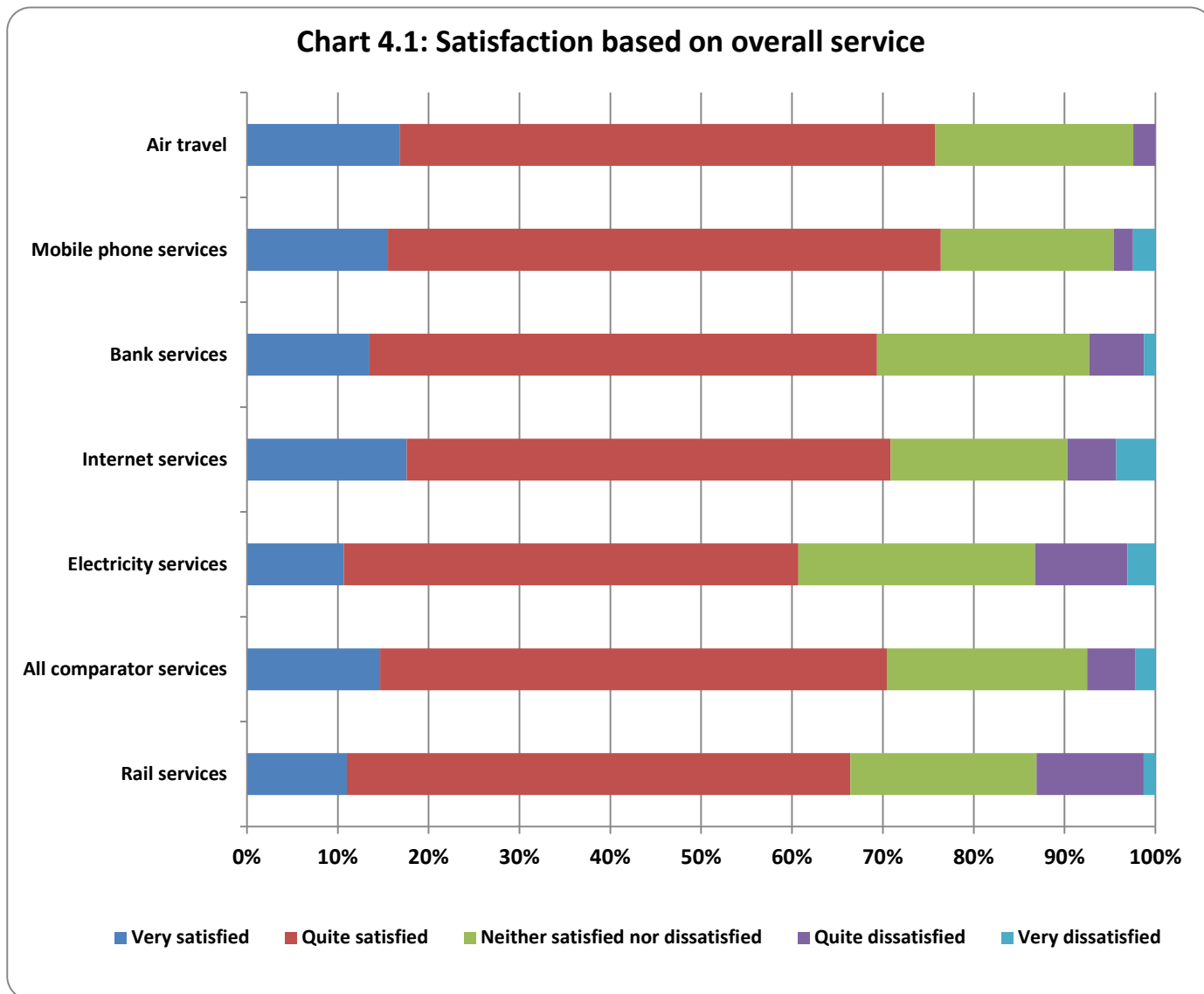
4.13 The following sections provide more detail on how rail services compare to each of the comparator services for each of the satisfaction elements.

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<sup>6</sup> Passenger Focus [National Rail Passenger Survey](#)

## Overall Satisfaction

4.14 The respondents to the omnibus survey were asked how satisfied they were with the rail services in their area based on the service overall with the same question asked for the randomly chosen comparator service. Chart 4.1 below presents the results of these questions revealing how satisfaction with rail services compares to other services in the GB.



4.15 Chart 4.1 shows that two thirds (66%) of the population are quite or very satisfied with rail services. This level of satisfaction is lower than all the 5 comparator utilities, with the exception of electricity services (61% very or quite satisfied). As you would expect the proportion of very or quite satisfied with rail services is 4 percentage points lower than the same satisfaction categories for the comparator services combined.

4.16 Looking at the rail satisfaction data in more detail, see Table 4.2, reveals that satisfaction is highest for those who use rail services once or twice a week. For those travelling once or twice a week 80% are either very or quite satisfied compared to between 61% and 68% for all other levels of frequency. Those travelling

once every six months are the most indifferent to rail satisfaction with 30% neither satisfied nor dissatisfied. Those travelling once every 2-3 months had the highest levels of dissatisfaction with overall services, with 16% quite or very dissatisfied.

Table 4.2 Satisfaction with rail services by frequency of use

Level of satisfaction	Frequency of rail travel in GB					Total
	3 or more times a week	Once or twice a week	1 or 2 times a month	Once every 2-3 months	Once every 6 months	
<b>Very or quite satisfied</b>	63%	80%	66%	68%	61%	66%
<b>Neither satisfied nor dissatisfied</b>	23%	13%	19%	16%	30%	21%
<b>Quite or very dissatisfied</b>	14%	6%	15%	16%	9%	13%

## Elements of satisfaction

4.17 Chart 4.1 above reveals that satisfaction with overall rail services is lower than that of comparator services, but greater understanding of how rail services perform in relation to other services can be gained from looking at individual elements of service.

4.18 Respondents were asked to answer questions on six individual elements of satisfaction for both rail services and for one of the comparator services. The individual elements of satisfaction which were covered by the survey are:

- satisfaction based on the information available;
- satisfaction based on ease of contacting the relevant service provider;
- satisfaction based on fairness and transparency of charges;
- satisfaction with the value for money of service;
- satisfaction based on dependability and reliability of the service; and
- satisfaction based on friendliness and helpfulness of staff.

4.19 The survey, in addition to asking about satisfaction based on the above elements asked a number of other questions which provide comparisons between rail and the comparator services. These covered pricing of the services asking:

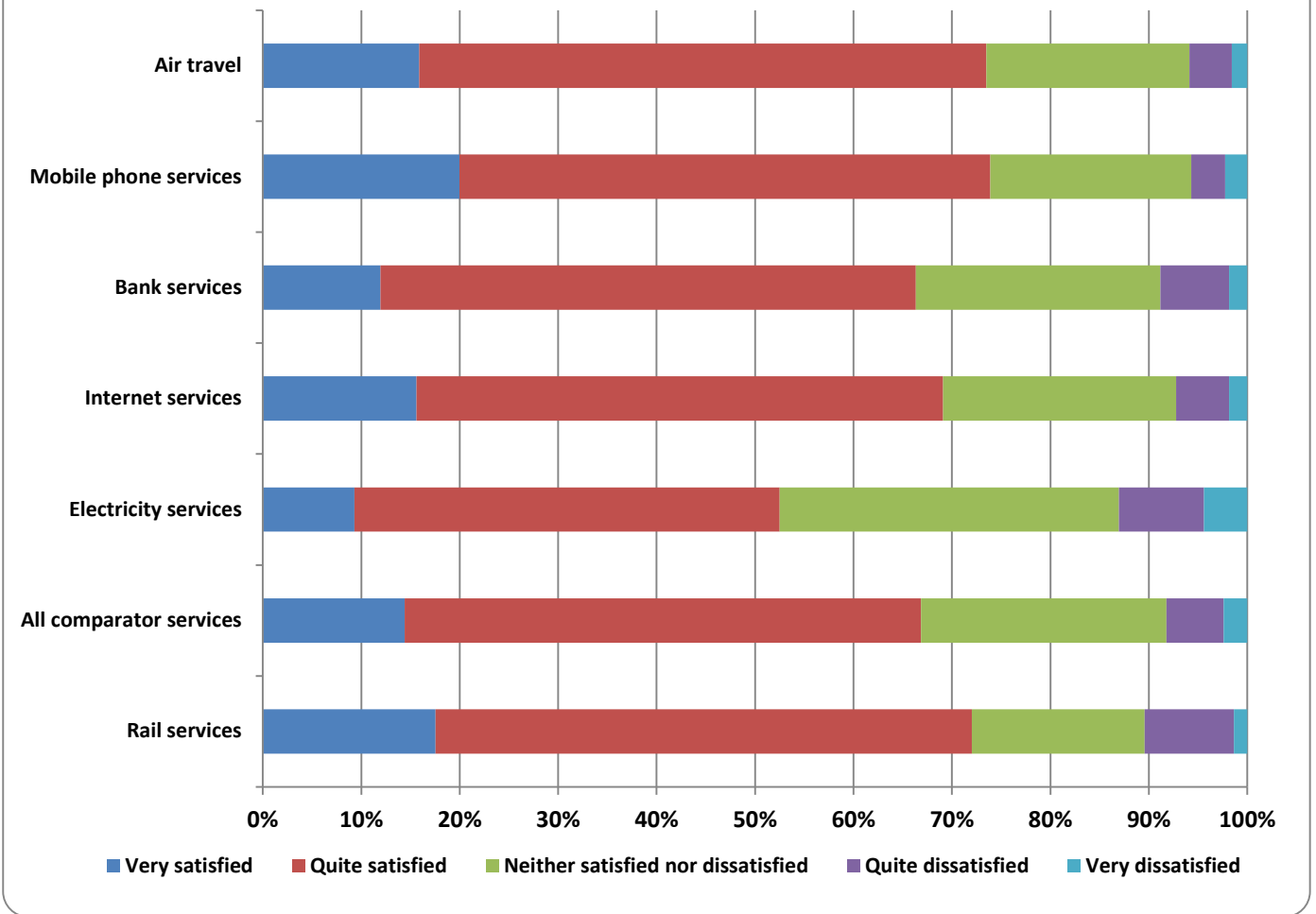
- How easy do you find it to get the best price for the service? and
- How much do you expect the price of the service to change each year?

4.20 The survey enables the benchmarking of rail services, for each of the above individual elements, against the five comparator services individually in addition to against a comparator services variable which is the sum of all the comparator services together.

### **Satisfaction based on information availability**

4.21 Satisfaction based on information availability is one area in which rail services favourably compare to comparative services. Rail services have a higher proportion, 72%, very or quite satisfied with information availability compared to comparator services overall, 67%. Compared to the different comparator services rail services have a higher proportion very or satisfied than electricity (52%), internet (69%) and banking (66%) services but slightly lower than mobile phone (74%) and air travel (74%) services.

**Chart 4.2: Satisfaction based on information availability**



4.22 Noticeably rail services also have the second highest proportion, 10%, quite or very dissatisfied and the smallest proportion, 18%, neither satisfied nor dissatisfied with information availability. The nature of the markets could help explain the smaller proportion neither satisfied nor dissatisfied with rail information availability.

4.23 For example, the requirement to seek information on rail journeys is likely to be more frequent, possibly for every journey, than for some of the comparator services, such as internet and electricity services, which may be an annual or even less frequent requirement. More frequent requirement for information, be it directly from the service provider or a third party such as a ticketing website, may mean respondents were more confident in choosing a level of satisfaction.

4.24 The results of the survey do not indicate the satisfaction with information availability in certain circumstances, such as at times of service disruption, rather providing an overview. Analysis of levels of satisfaction with information availability when there is service disruption, which is often the situation when there is greatest demand for information, would provide further insight into levels of satisfaction with rail compared to the other services.

4.25 The comparatively high levels of success can be attributed to recent positive steps within the industry. In late 2008 Network Rail and train operators set up the 'Passenger Information During Disruption' project which produced a joint code of practice for providing timely, correct and consistent information at stations, on trains, on the internet and over the phone<sup>7</sup>. This implemented a programme to improve a wide range of railway operational systems and procedures, including making sure staff adapt how they work, cross industry training, and upgrading information systems to a single up-to-date information source.

4.26 The results of the NRPS further show how this work has been successful with the satisfaction with the *"provision of information during the journey"* increasing from 66% in Spring 2009 to 71% in the Spring 2013 wave and the *"provision of information about trains/ platforms"* category increasing from 78% to 81% over the same time period.

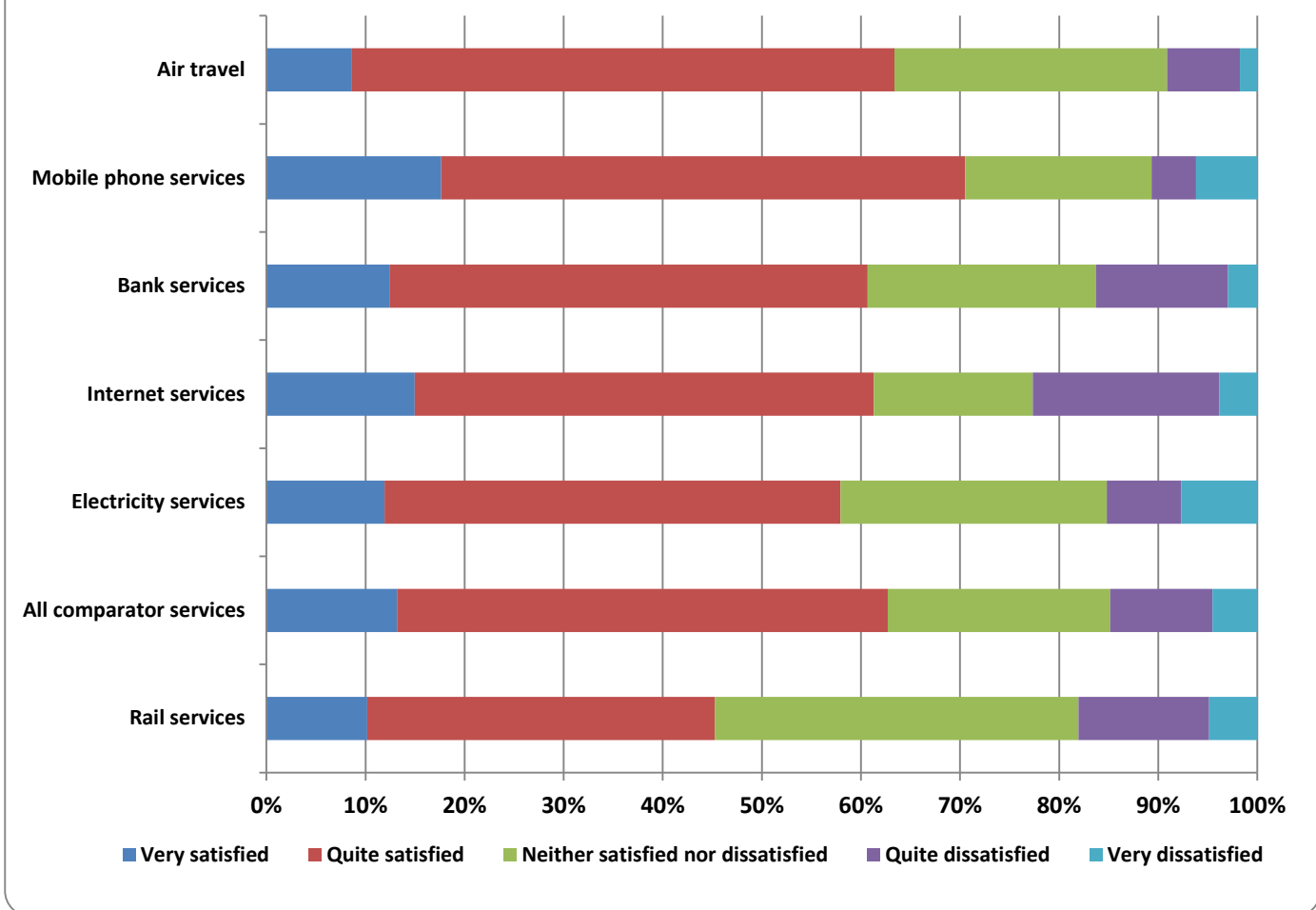
4.27 Whilst satisfaction with information availability for rail services is high when benchmarked against comparator services this is not the case when looking at satisfaction based on ease of contact. Compared to the level of very and quite satisfied for the comparator services overall, 63%, satisfaction with the ease of contact for rail services, 45%, is 18 percentage points lower. The variance in level of dissatisfaction (quite or very dissatisfied) between rail services and comparator services is not as large with 18% quite or very dissatisfied with the ease of contact for rail services and 15% for comparator services overall.

4.28 The reason for this difference in variances is that the level of neither satisfied nor dissatisfied is much higher for rail services (37%) than comparator services (22%), which is the converse to that seen for information availability for which rail had the least in neither satisfied nor dissatisfied.

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<sup>7</sup> ATOC [Approved Code of Practice – Passenger Information During Disruption](#)

**Chart 4.3: Satisfaction based on ease of contact**



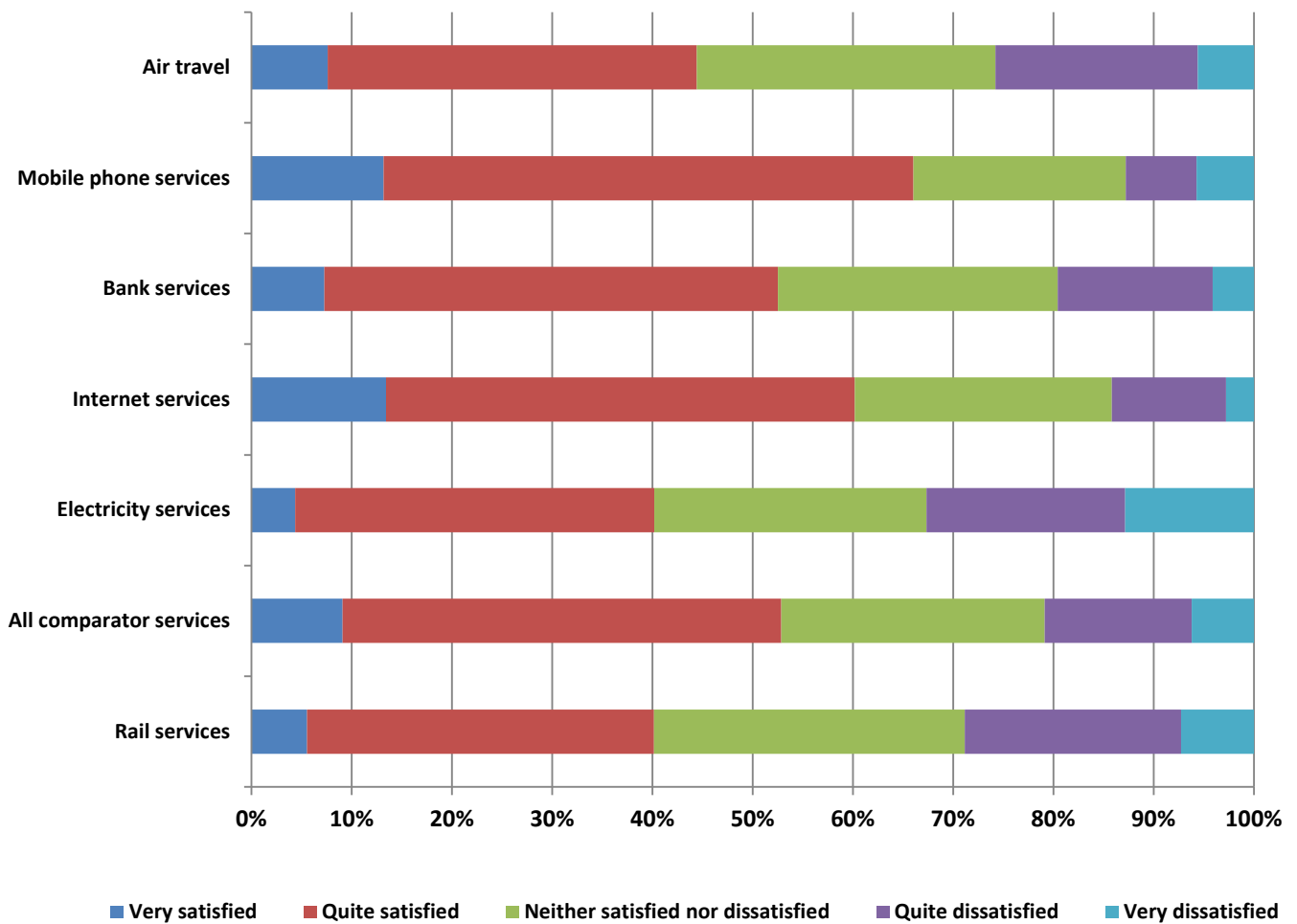
**Satisfaction based on fairness and transparency of charges**

4.29 Satisfaction based on fairness and transparency of charges is another element of satisfaction where rail services score badly compared to comparator services. Only electricity services, 33%, have a higher proportion of users scoring satisfaction based on fairness and transparency of charges as quite or very dissatisfied, whilst at 29% rail services is 8 percentage points higher than comparator services overall, 21%.

4.30 40% of the population are quite or very satisfied with the fairness and transparency of charges for rail services compared to 53% for comparator services overall, with mobile phone and internet services scoring highest in this category with over 66% and 60% respectively. Chart 4.4 below shows the levels of satisfaction for each service.



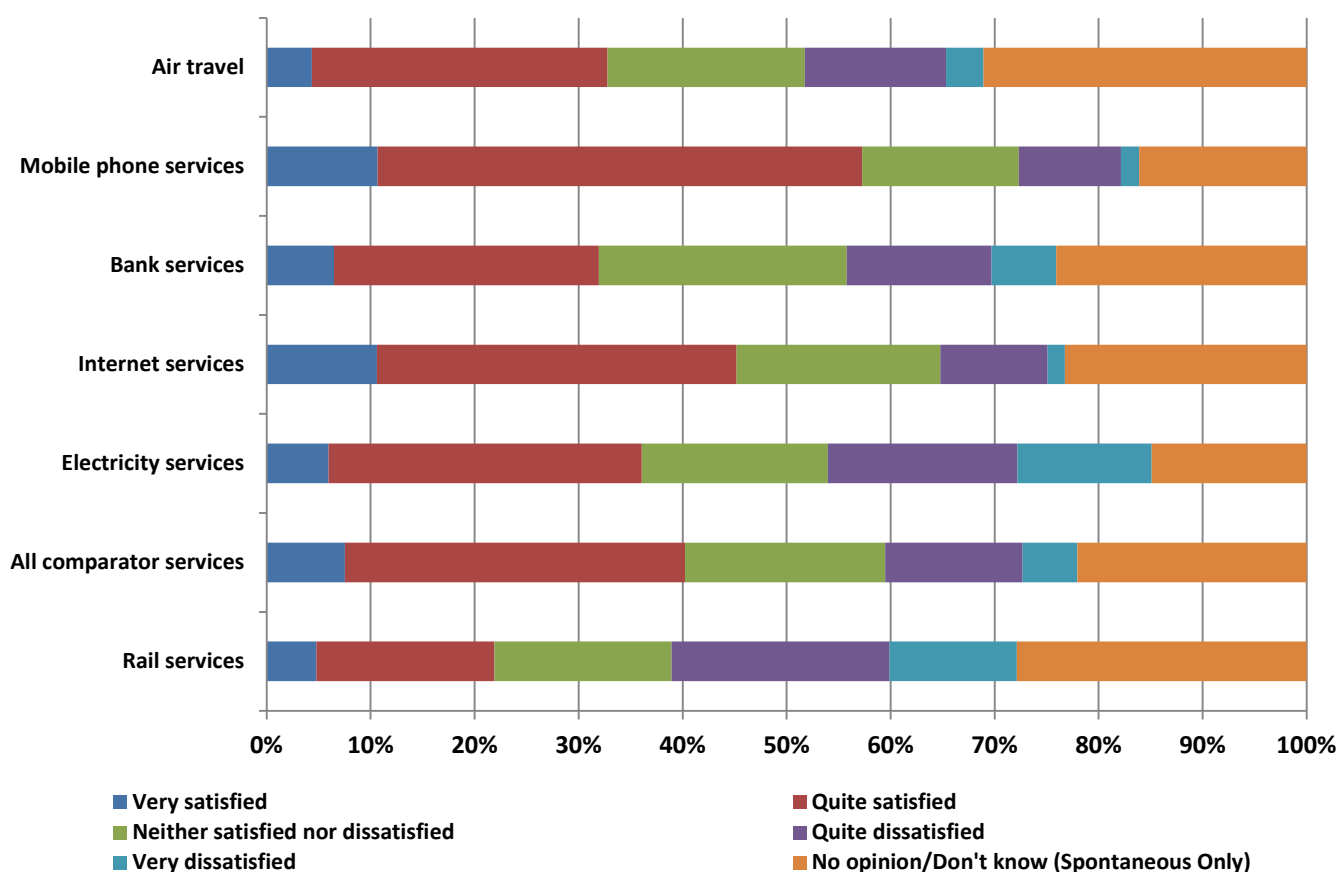
**Chart 4.4: Satisfaction based on fairness and transparency of charges**



### Satisfaction with value for money of service

4.31 Satisfaction levels with value for money is the element of satisfaction where rail services are furthest away from comparator services with the proportion quite or very satisfied with rail service value for money 22% compared to 40% for comparator services.

**Chart 4.5: Satisfaction with value for money**



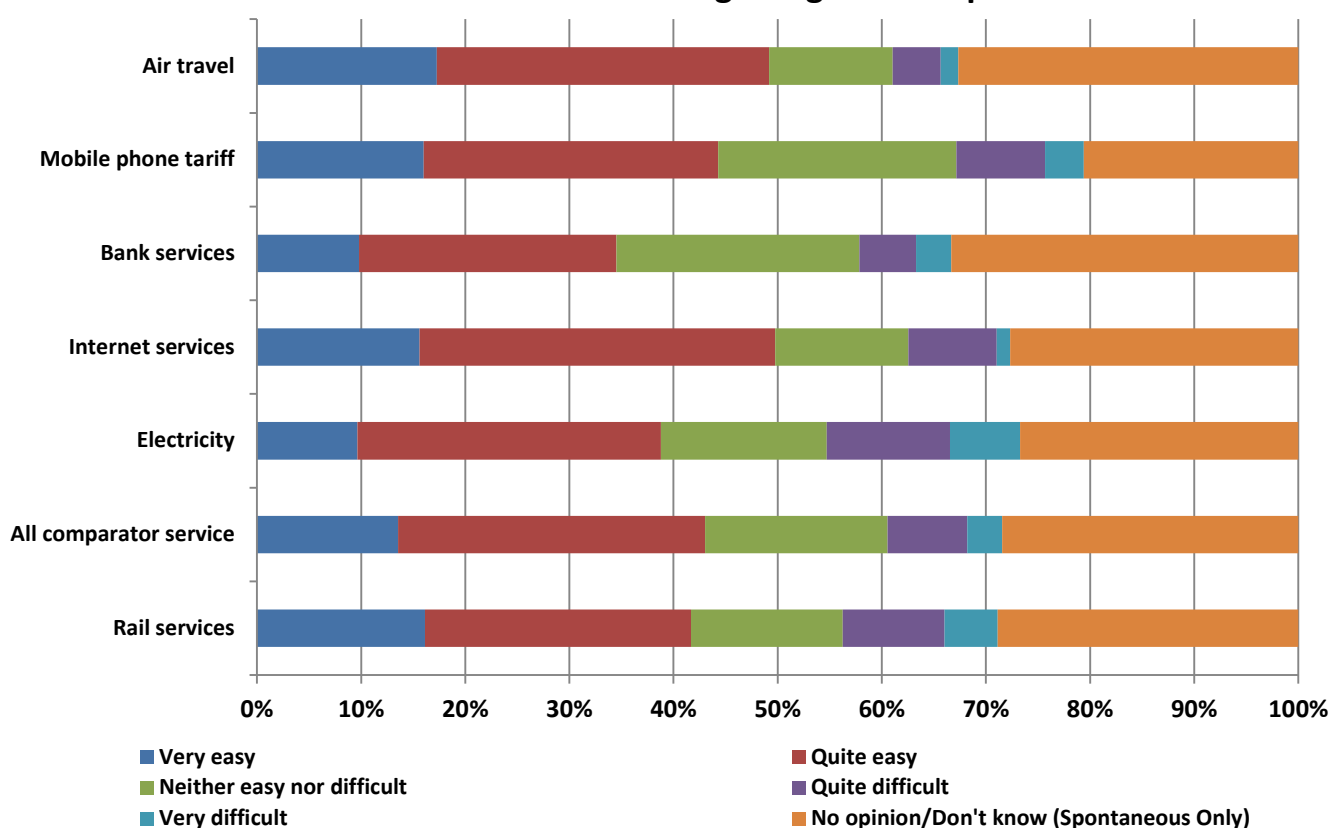
4.32 At 33% the proportion quite or very dissatisfied with value for money of rail services is at least 13 percentage points greater than all the comparator services with the exception of electricity services for which 31% are quite or very dissatisfied.

4.33 This low level of satisfaction is consistent with the results of the latest wave of the NRPS in which the level of rail users satisfied with “the value for money of the price of your ticket” is 42% at a National level.

**Ease of getting the best price and expected annual price change**

4.34 Related to value for money the ease of getting the best price for rail and the comparator services was asked. In this category rail services score more comparably to the other services with 42% finding it quite or very easy to find the best price, compared to 43% for the comparator services overall. The largest variance to rail services in the ease of getting the best price is for internet services, for which 50% find it quite or very easy.

**Chart 4.6: Ease of getting the best price**



4.35 At 42%, finding it quite or very easy to get the best price, rail services is slightly lower than comparator services overall, 43%. Internet, 50%, mobile phone, 44% and air travel, 49% services all have a higher proportion which find it quite or very easy to get the best price whilst electricity and bank services, at 39% and 35% respectively, have a lower proportion than rail.

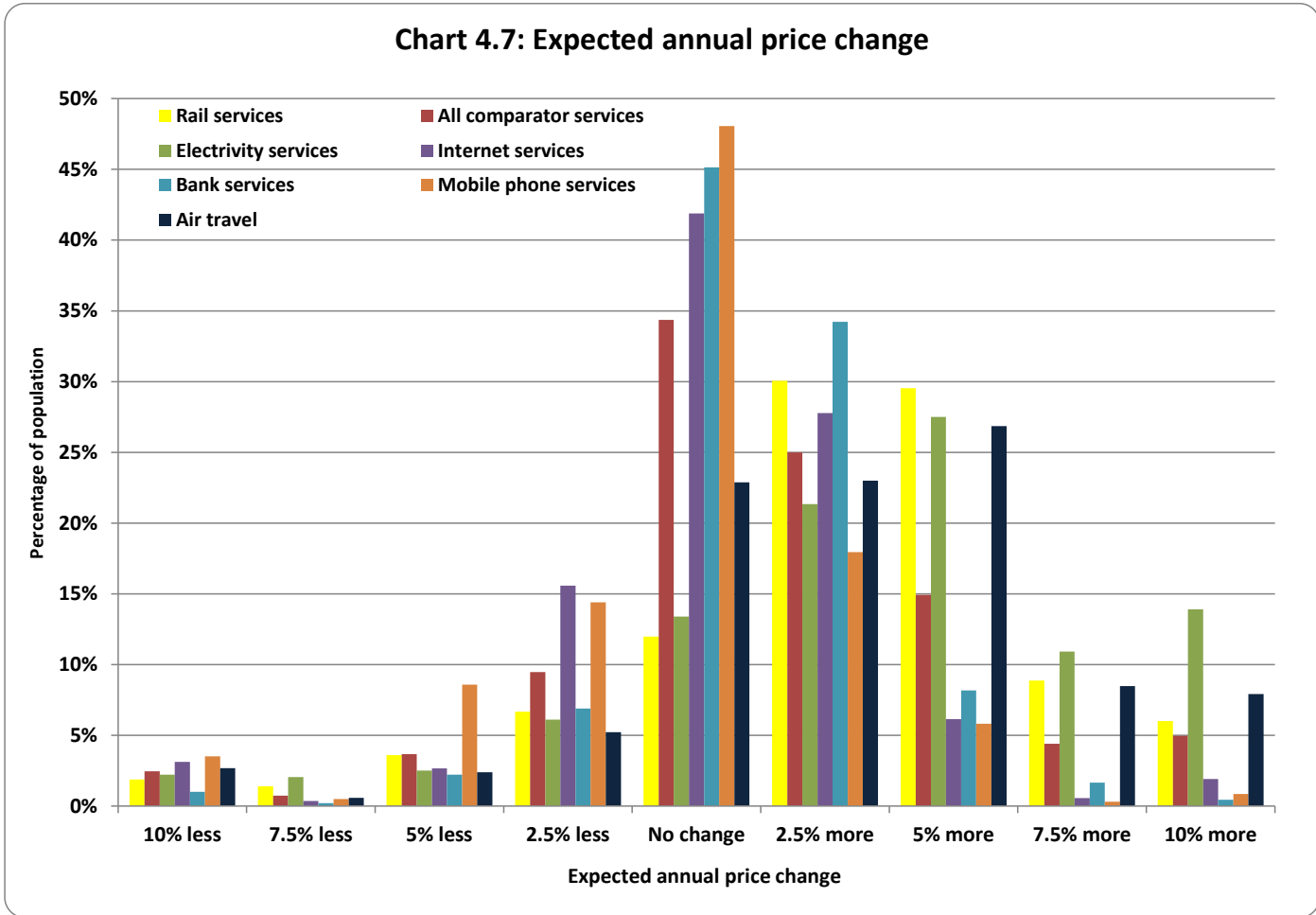
4.36 When assessing just those who find getting the best price very difficult to obtain, rail services, with 5%, have the second highest proportion. This is slightly lower than for electricity services, 7%, but higher than the comparator services overall, 3%.

4.37 The answers to ease of getting the best price for rail travel can be compared with the reasons given for not travelling by rail in the last 6 months to provide more insight into rail fares. Of those which find it quite or very difficult to get the best price for rail fares and have not travelled by rail in the last 6 months the second highest proportion, 23%, have not travelled in the last 6 months because they “can’t afford to/ rail travel too expensive” (this is second and behind no need which accounts for 60%). The reverse of this shows that the reason of “can’t afford to/ rail travel too expensive” accounts for only 7% of those who whilst finding it quite or very easy to find the best price for rail fares have not travelled by rail in the past 6 months.

4.38 Chart 4.6 shows that 29% have no opinion or don’t know when it comes to finding the best rail price, unsurprisingly 86% of which travel less often than every 6 months or never travel by rail in the GB.

4.39 Related to the value for money and ability to successfully obtain the best price is perceptions of annual price changes. The survey asked respondents for their expected annual price change for rail services and their assigned comparator services. This shows large variance between rail services and comparator services overall, as well as large variance between the different comparator services.

4.40 Chart 4.7 shows that while the distributions for expected annual price change in rail services and comparator services are both skewed towards a price increase the modal change for rail services is a 3% increase compared to no change for comparator services overall. The shape of the distribution for the comparator services show rail services and electricity services being the most similar.



4.41 Electricity services are expected to have the highest price increases, with 25% expecting a price increase of 7.5% or 10% more. The travel services of rail and air have a similar proportion in this price change bracket with 15% and 16% respectively whilst the other comparator services all have less than 2.5% in this expected price change bracket.

4.42 Whilst having the third highest proportion in the high increase bracket, of 7.5% or 10% more, rail services has the highest proportion which expect prices to increase. Some 75% are expecting an annual price increase in rail services, which is 25 percentage points higher than comparator services overall.

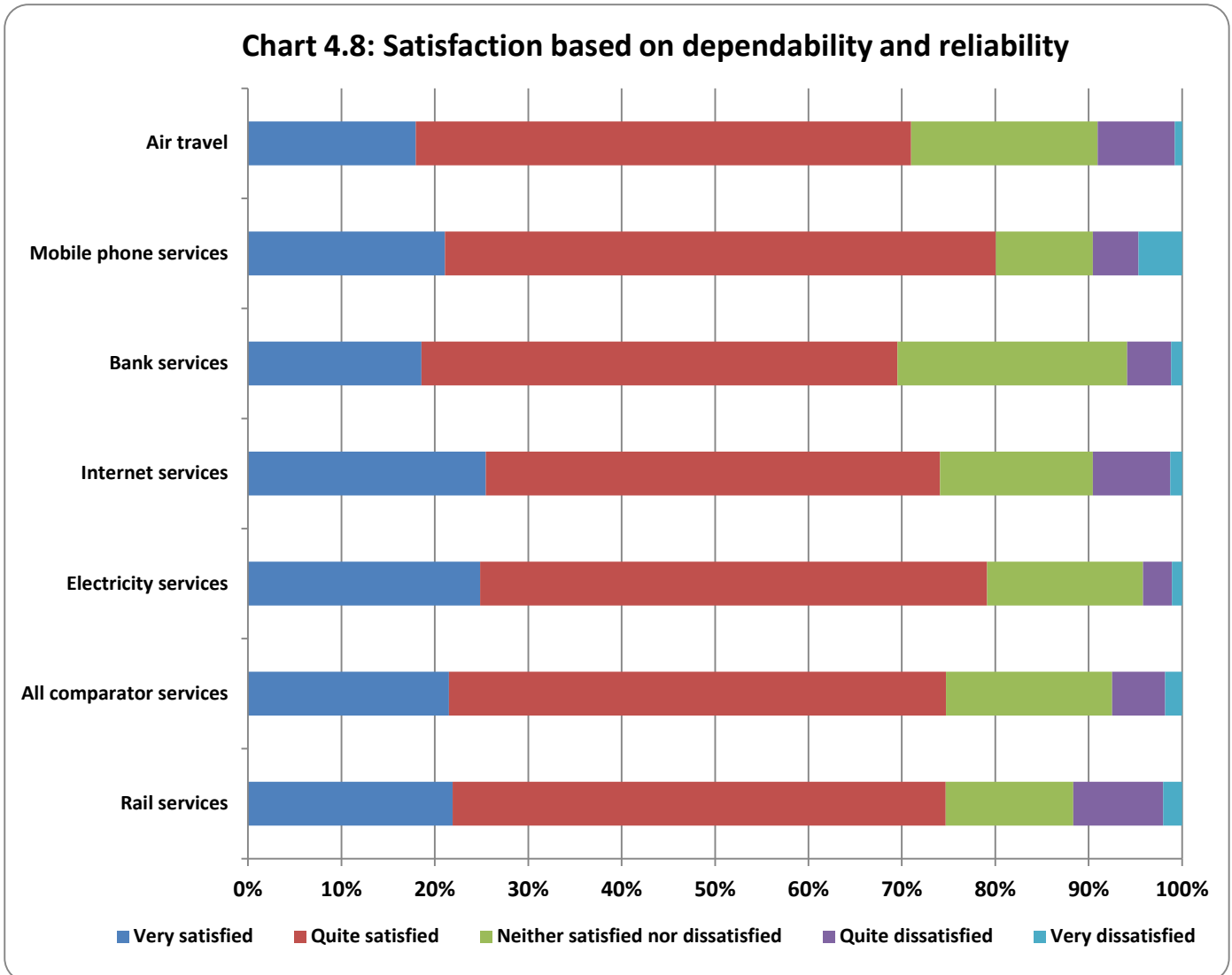
However the range for comparator services is quite large, from 25% expecting a price increase for mobile phone services compared to 74% for electricity services.

### Satisfaction based on dependability and reliability of service

4.43 The elements of satisfaction presented above all show variances, either better or worse, between rail services and the comparable services. The results of two of the elements covered by the omnibus survey reveal similar satisfaction levels between rail services and the comparator services. These are dependability and reliability of the service and the friendliness and helpfulness of staff.

4.44 The first of these, satisfaction based on dependability and reliability of the service, shows that 75% are very or quite satisfied with this aspect of both rail services and comparator services overall. Mobile phone services, 80%, and electricity services, 79%, had a slightly higher proportion very or quite satisfied, whilst internet service, 74%, air travel, 71%, and bank services, 70%, are lower than rail services.

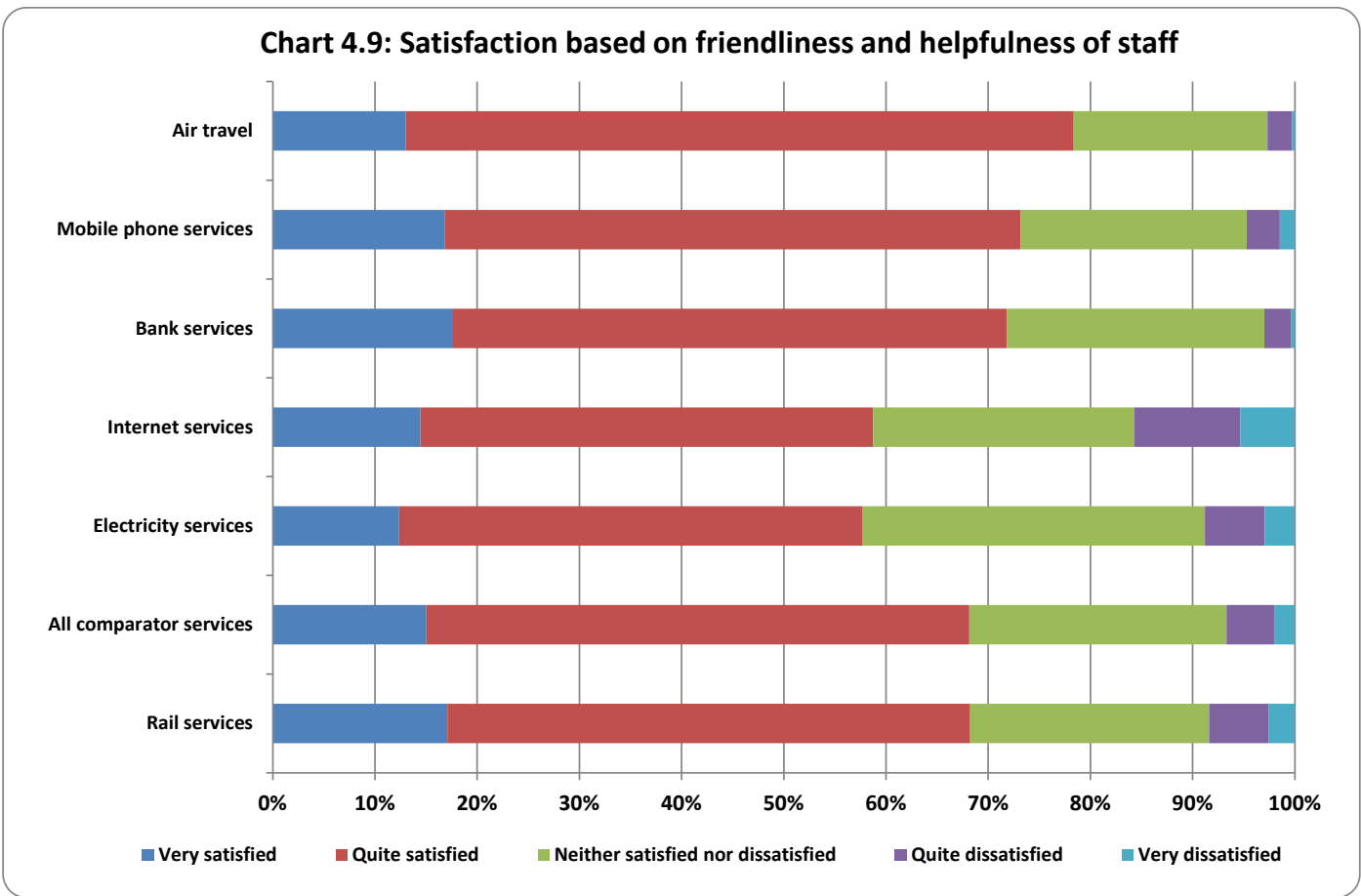
**Chart 4.8: Satisfaction based on dependability and reliability**



4.45 There is more variance when comparing dissatisfaction, where 12%, are quite or very dissatisfied with the dependability and reliability of rail services compared to 4% for electricity services and 10% mobile phone services, the lowest and highest of the comparator services.

**Satisfaction based on friendliness and helpfulness of staff**

4.46 Satisfaction based on friendliness and helpfulness of staff is the other element where rail services score similarly to the comparator services. The proportion rating quite or very satisfied with the friendliness and helpfulness of staff is 68% compared to 68% for comparator services overall. At 17% the proportion very satisfied with the friendliness and helpfulness of rail staff is the second highest, behind bank services, 18%, with electricity services having the lowest proportion, 12% very satisfied.



4.47 At 8% the proportion quite or very dissatisfied with the friendliness and helpfulness of staff associated with rail services is slightly higher than for comparator services, which is 7%. The proportion for rail services is similar to that for electricity, 9%, 6 percentage points better than for air travel, but 7 percentage points worse than for internet services.

4.48 The proportion of the population satisfied with the friendliness and helpfulness of staff recorded in the benchmarking survey is similar to the level of rail users of rating the attitudes and helpfulness of staff in the

latest wave of the NRPS. At a National level there is a 71% level of satisfaction with the attitudes and helpfulness of staff at station facilities and 65% level of satisfaction with staff on board trains.

## **Next steps**

4.49 In order to maximise the usefulness of the survey results, we have identified the following next steps:

4.50 We will share the benchmarking report with the wider ORR, particularly directors, RME and competition and consumer policy, to identify what policies (if any) are being implemented or could be implemented to address the points identified in the benchmarking report.

4.51 We will share the findings with Passenger Focus and the regulators against which rail services were benchmarked and meet to obtain their views and share best practice.

4.52 We will investigate the opportunities to create a time series of the data, through future surveys, to enable future analysis of satisfaction benchmarking, and identify the success of policy decisions taken to try and improve the level of satisfaction compared to other services.

4.53 We will undertake analysis of the other data collected through the OMNIBUS survey, which will concentrate on users of rail, identifying trends in reasons for rail use or barriers to rail use.

# 5. Appendices

## Appendix A – Summary of dissatisfaction benchmarking

Dissatisfaction with	Rail services benchmarked against					
	Electricity services	Internet	Banking	Mobile phone	Air travel	All comparator services
Information availability	-	+	+	+	+	+
Dependability and reliability	+	+	+	+	+	+
Ease of finding the best price	-	+	+	+	+	+
Friendliness and helpfulness of staff	-	-	+	+	+	+
Ease of contacting the service provider	+	-	+	+	+	+
Fairness and transparency of charges	-	+	+	+	+	+
Value for money	+	+	+	+	+	+
<b>OVERALL SERVICE</b>	-	+	+	+	+	+



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**OGL**