



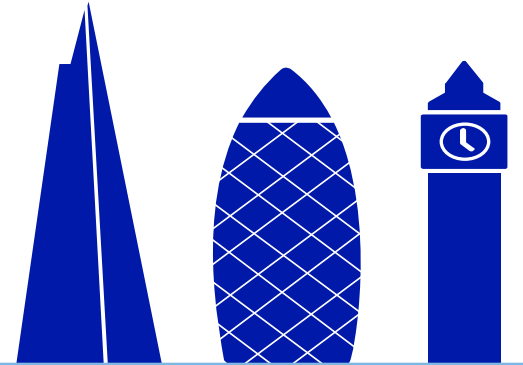
SEPTEMBER 2016

# Fit for the Future – Stations Customer Impact Review

Appendix

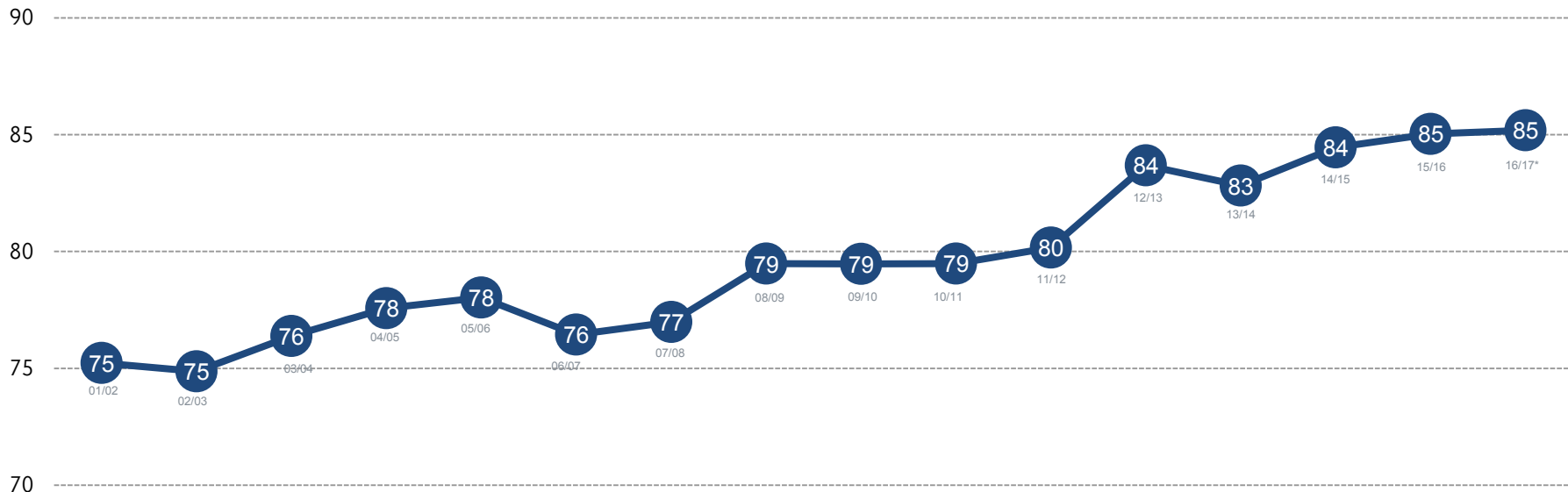


# London Underground Customer Service Satisfaction Survey *Q1 2016/17*



# It has been a strong start to 2016/17 with a year-to-date overall satisfaction score of 85

Annual scores

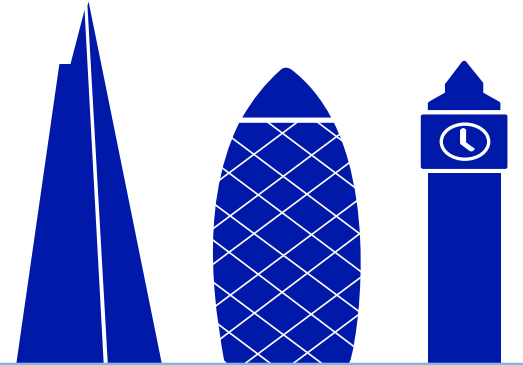


*\*2016/17 annual score includes Q1 only*



# London Underground Staff and Information Mystery Survey

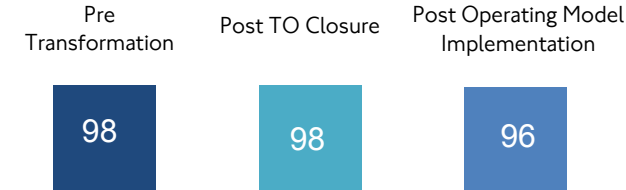
*Period 4 2016/17*



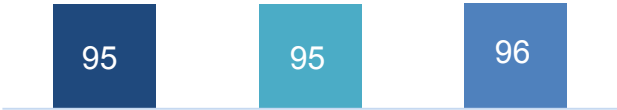
**Staff presence has dipped to slightly to 96 since the operating model has been implemented.**  
**Staff attention to customers has improved to 96 and staff helpfulness remains at 95**

Customer Service  
Performance Summary  
Period 04 Final

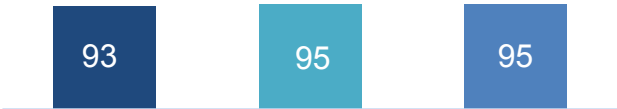
**Staff Presence**  
SIS



**Staff Attention to Customers**  
SIS



**Staff Helpfulness**  
SIS



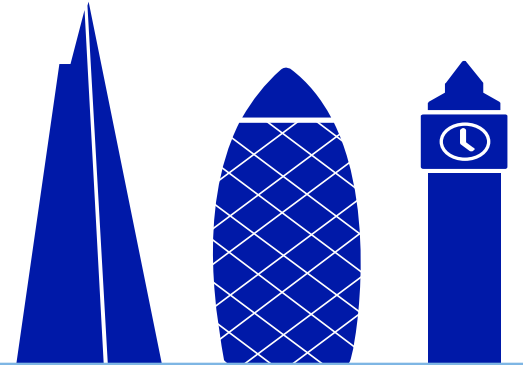
The following plans have been implemented to address this small reduction in presence:

- Rosters are being reviewed
- Vacancies are being filled
- Line managers are promoting staff visibility at stations with a recurring issue



# London Underground Ticketing Customer Service Satisfaction Survey

*Spring 2016*



1.

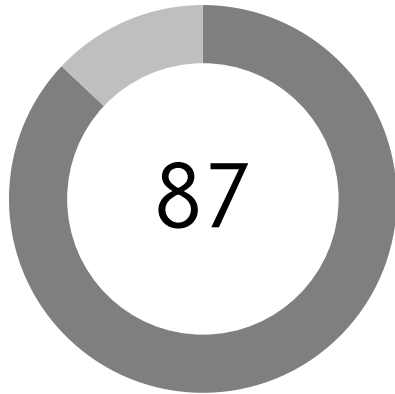
Are customers responding positively?

# Overall satisfaction has remained unchanged throughout the transformation.

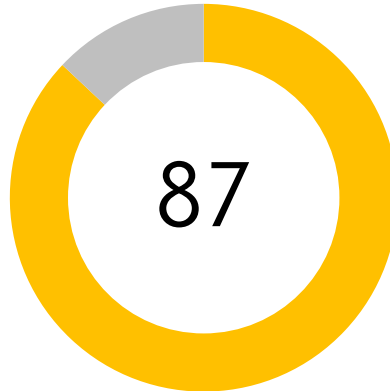
## Overall satisfaction - Network

Mean score out of 100

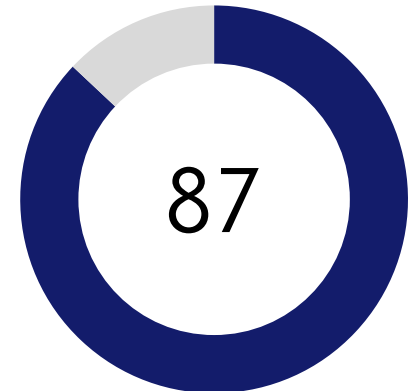
Pre transformation



Post ticket office closure



Post operating model implementation



Base: Pre-transformation (2261), Post-transformation (1523), Post operating model implementation (1016)

In 2014, pre transformations, the target was set to maintain satisfaction at 85 (or over) during the transformation programme

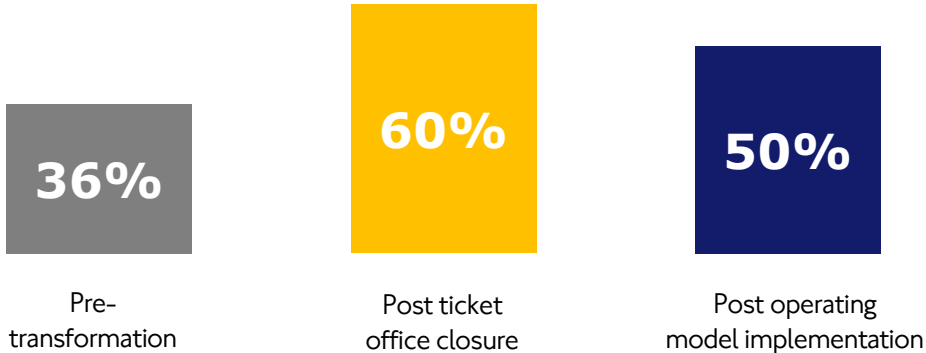




# Customers perceive there to be significantly more members of staff available at ticket machines compared to pre-transformation.

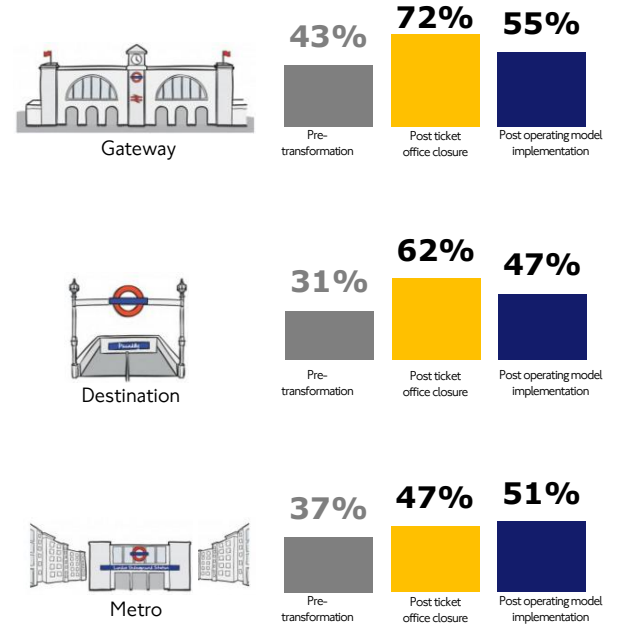
## Staff available at ticket machines to help if needed (%)

Base: Pre-transformation (2261), Post-transformation (1523), Post operating model implementation (1016)



Staff visibility has increased at all station types. There was a spike in visibility immediately after ticket office closures, as staff leaving via voluntary severance were still in post.

## Staff available at ticket machines to help if needed by station type (%)

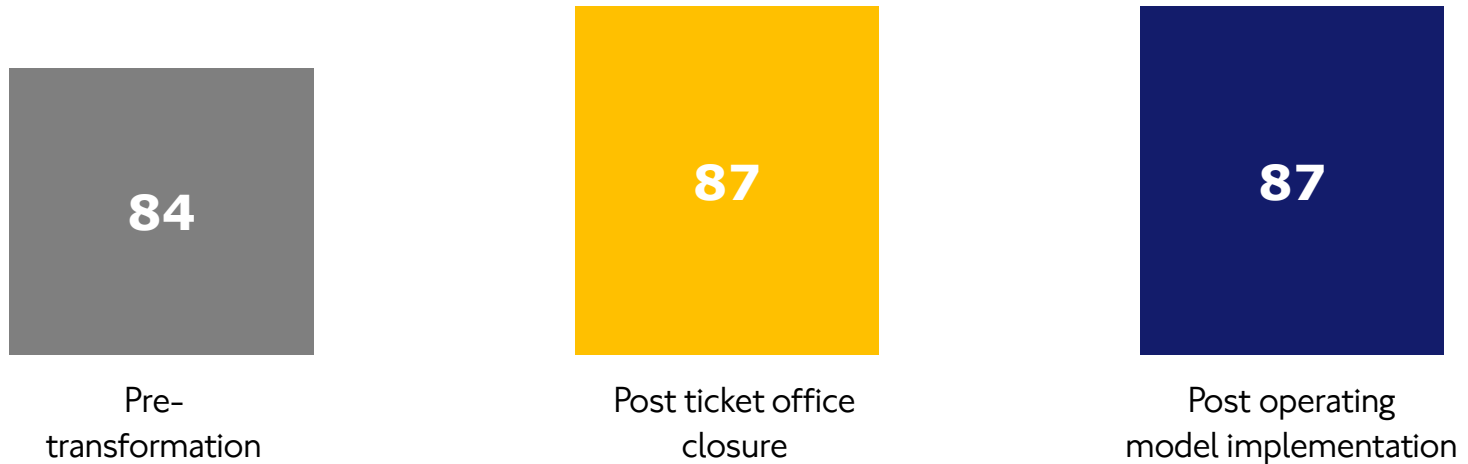


# The improvement in staff helpfulness has been sustained – a reflection that staff training is embedding.

## Staff helpfulness\*

\*High level of 'Don't know' between 39% and 56%;

Base: Pre-transformation (2261), Post-transformation (1523), Post operating model implementation (1016)



**2.**

Are customers receiving the assistance they need?

# There has been a shift in where customers seek assistance. More customers are seeking help at ticket machines. The quality of the assistance received has not changed significantly

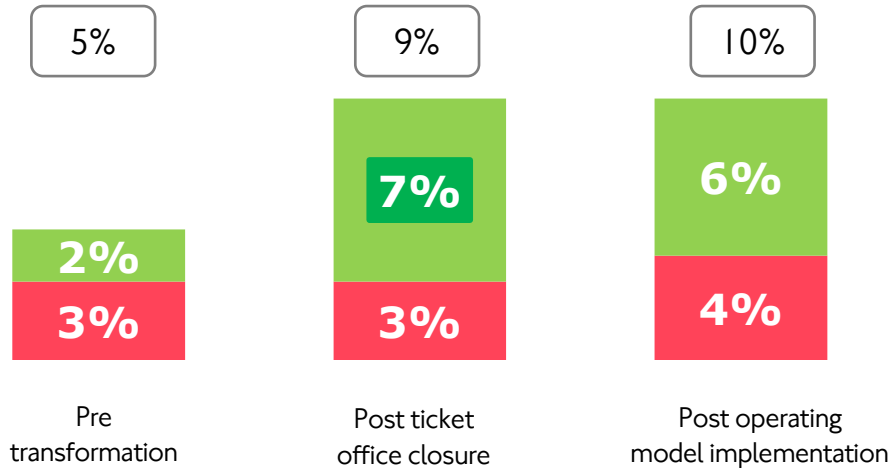
## Needed assistance when buying ticket (%) [Lower is better]

Base: Pre-transformation (2261), Post-transformation (1523), Post operating model implementation (1016)

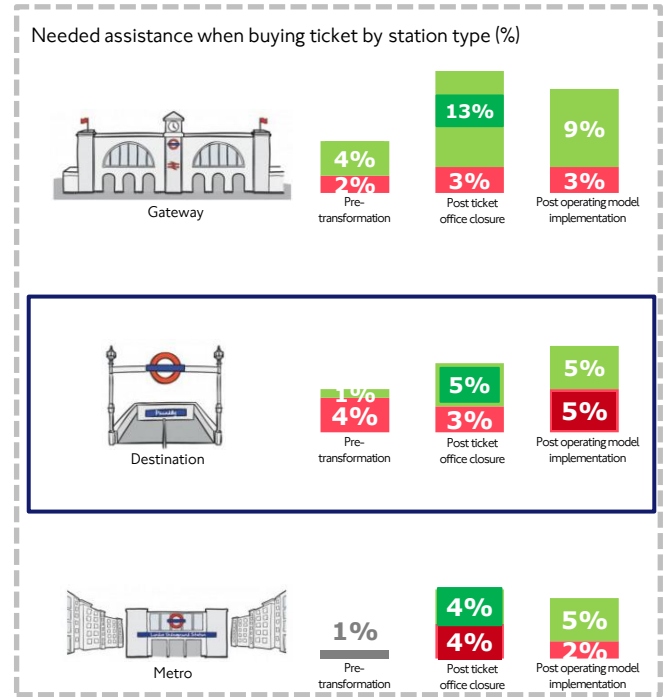
Received assistance

Did not receive assistance

% needed assistance:



## Needed assistance when buying ticket by station type (%)



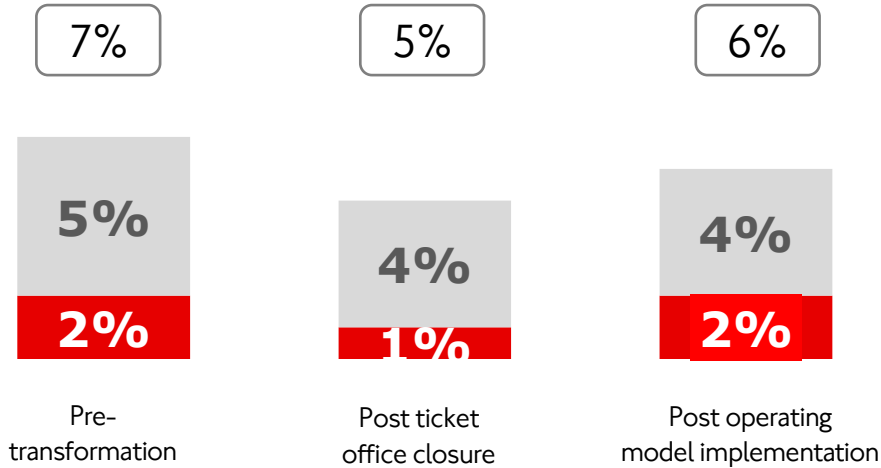
# The proportion of customers experiencing problems that could not be resolved remains very low.

## Experienced problem when buying ticket (%) [Lower is better]

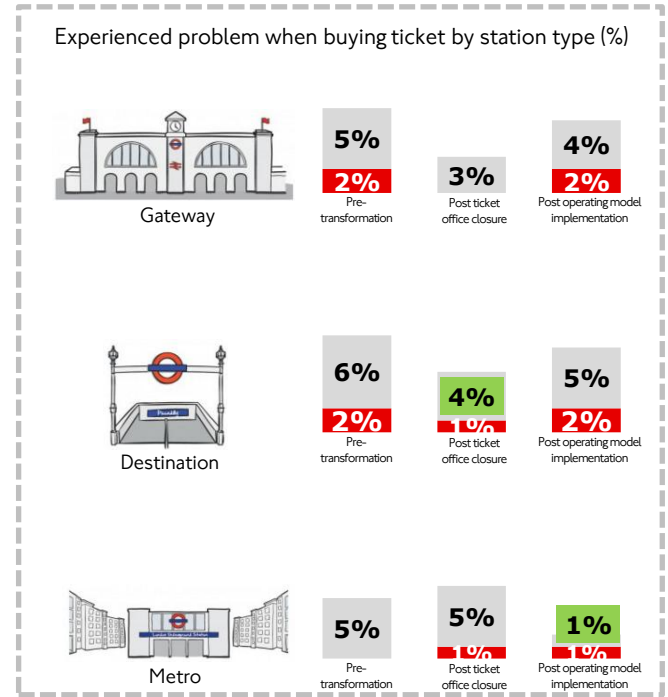
Base: Pre-transformation (2261), Post transformation (1523), Post operating model implementation (1016)

Problem resolved
  Problem not resolved

% experienced a problem:



## Experienced problem when buying ticket by station type (%)



3.

Are customers needs being satisfied?

# Customers value being able to buy their ticket quickly and easily. Information has become more important to Gateway and Destination customers since the ticket offices have closed.

## Key drivers of overall satisfaction - Post operating model implementation



Able to buy ticket quickly



Ease of buying ticket



Ticketing information seen/given

(More important compared to a year ago)

## Key drivers of overall satisfaction – post operating model implementation by station type



Gateway

- Able to buy ticket quickly
- Ease of buying ticket
- Ticketing information seen/ given



Destination

- Able to buy ticket quickly
- Ticketing information seen/ given
- Ease of buying ticket
- Felt confident what to do or say



Metro

- Able to buy ticket quickly
- Ease of buying ticket



# Satisfaction with the key drivers of the customer experience have remained high.

## Satisfaction with key drivers – Network

Mean score out of 100

Base: Pre-transformation (2261), Post-transformation (1523), Post operating model implementation (1016)



Able to buy ticket quickly

Pre-transformation

93

Post ticket office closure

93

Post operating model implementation

93



Ease of buying ticket

93

92

93



Ticketing information seen/given

91

90

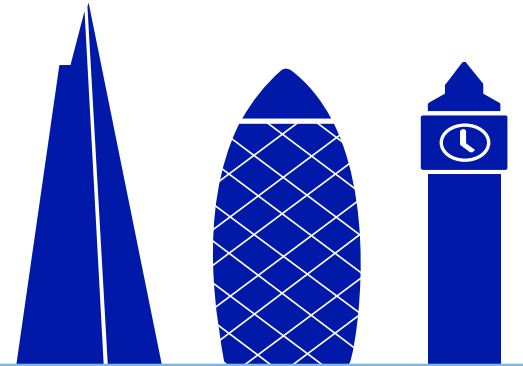
90





# London Underground Ticketing Customer Service Satisfaction Survey

*Spring 2016 - visitor ticket purchase  
experience at Gateway and Destination  
Stations*



# Speed and ease of purchase are key drivers of Visitor satisfaction. Visitors want to feel confident when buying a ticket and so value clear information about ticketing.

Primary drivers of overall satisfaction among visitors



Able to buy ticket quickly



Ease of buying ticket

Secondary drivers of overall satisfaction among visitors



Problem-free experience



Clear ticketing information





Felt confident about what to do

Base: Total Spring 2016 Visitors (656)



Compared to Gateway stations, visitors at London Bridge, Stratford, Waterloo and Charing Cross were equally satisfied with the speed of purchasing their tickets. Visitors are very satisfied at all these stations, but slightly more satisfied with the ease of purchase at Gateways

**Primary** drivers of overall satisfaction among visitors

	Gateway	London Bridge, Stratford, Waterloo, Charing Cross
 Able to buy ticket quickly	90	90
 Ease of buying ticket	92	90

Base: Total Spring 2016 Visitors (656)



The vast majority of visitors had a problem-free experience and found ticketing information clear at all these stations; however, performance at Gateways was marginally better.

Secondary drivers of overall satisfaction among visitors



Problem-free experience

Gateway

92%

London Bridge, Stratford,  
Waterloo, Charing Cross

90%



Clear ticketing information

91

85

Base: Total Spring 2016 Visitors (656)



# Visitors had more confidence they had bought the right ticket at London Bridge, Stratford, Waterloo and Charing Cross than at Gateways.

**Secondary** drivers of overall satisfaction among visitors

Gateway  
London Bridge, Stratford,  
Waterloo, Charing Cross



**Confident bought the right ticket**

92

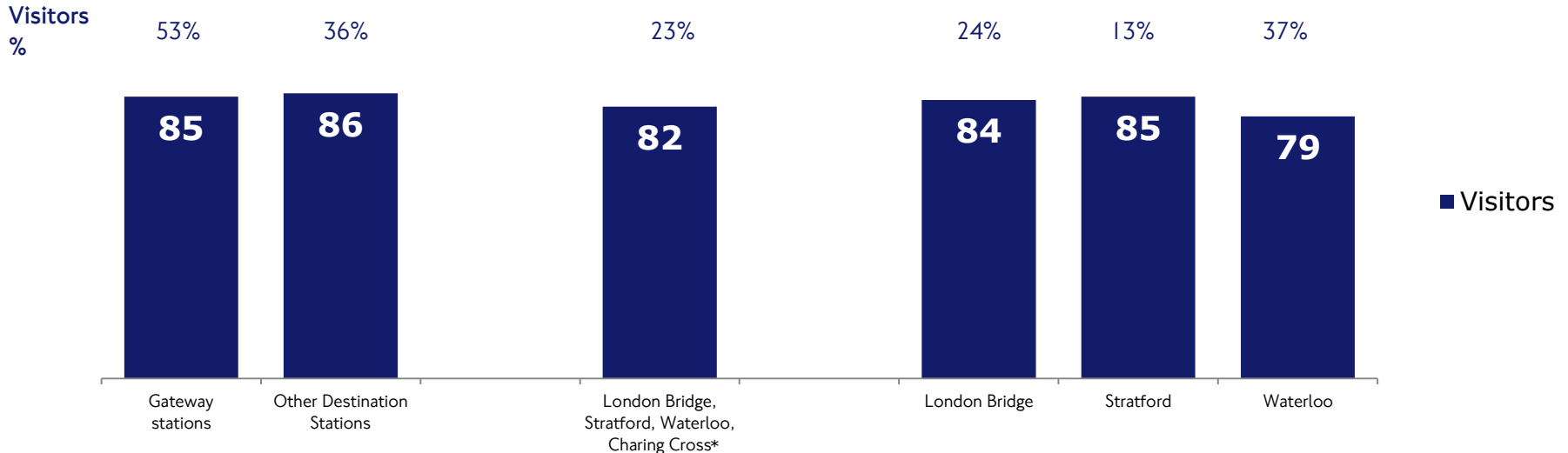
94

Base: Total Spring 2016 Visitors (656)



Visitors are positive about their overall experience at all key. The lower satisfaction score at Waterloo is likely due to problems with the ticket machines at the time of the survey.

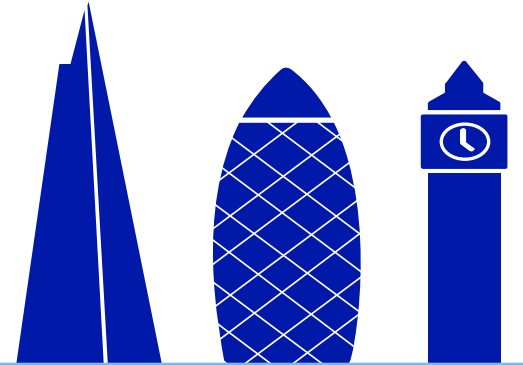
Overall satisfaction with the ticket purchase experience  
 Mean score out of 100



\*Charing Cross sample size too small to be shown individually

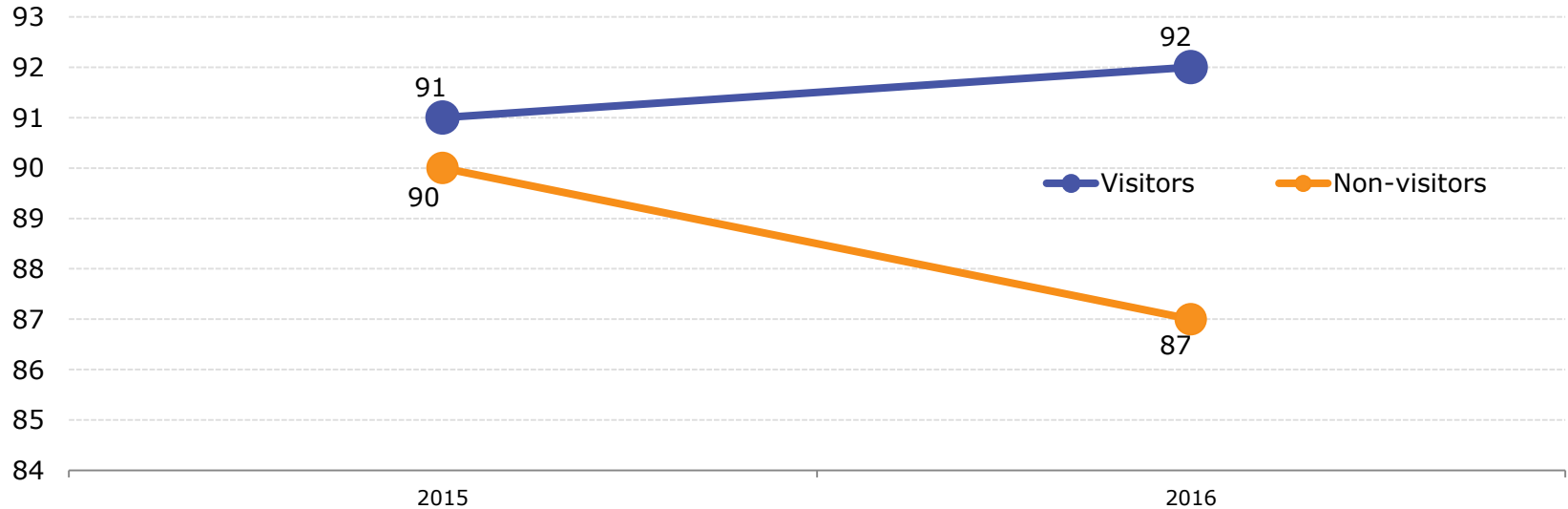


# Visitor Centre Customer Satisfaction Survey 2016



Since the transformation of Travel Information Centres to Visitor Centres, visitors are more satisfied with their experience, while non-visitors are less satisfied. This likely reflects the change in focus of the centres.

Overall satisfaction of visitors



Q4. Thinking of this particular visits you've just made at this Visitor Centre, how satisfied were you on a scale of 0 to 10 (where 10 is extremely satisfied and 0 is extremely dissatisfied) with the **overall service** you experienced today:

Base: Visitors 565, Non-visitors 216





# Visitor satisfaction has improved across a number of measures compared to last year

Satisfaction: individual measures Visitor and Non-visitor  
Mean scores

	Visitor	
	2015	2016
<b>Overall satisfaction</b>	<b>91</b>	<b>92</b>
Staff availability	<b>93</b>	<b>93</b>
Queuing time	<b>93</b>	<b>93</b>
Staff Helpfulness and appearance	<b>91</b>	<b>93▲</b>
Travel information	<b>91</b>	<b>92</b>
Range of travel services and products	<b>90</b>	<b>92</b>
Visitor information	<b>90</b>	<b>92▲</b>
Range of tourist services and products	<b>88</b>	<b>91▲</b>
Cleanliness	<b>87</b>	<b>89▲</b>
Condition and state of repair	<b>86</b>	<b>89▲</b>

▲ 2016 significantly higher than 2015

▼ 2016 significantly lower than 2015

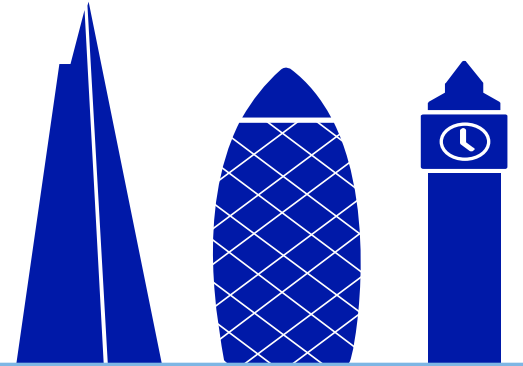
The darker the blue, the higher the score

Q6. Now I would like you to think about the **service** at this Visitor Centre today. As a score out of 10, how satisfied were you with?

Base: Visitor (565); Non-visitor (216)



**Reported crime data  
British Transport  
Police**



**Despite rising demand, there has been no appreciable change in the number of incidents reported in ticket halls, at ticket machines and at ticket barriers**

**Total number of crimes in ticket halls**

