Cover slide:
Customer Service & Operational Performance Panel – 4 October 2023.
Deep-dive on TfL's "Care score"

Slide 2: Background.

Slide body text:

For the past 11 years, we have monitored the proportion of Londoners that believe "TfL cares about its customers" (often referred to as the Care score).

Understanding what drives this perception has helped us to tackle pain-points and make improvements that matter most to customers.

However, significant disparities in the Care score persist for different customer groups.

The Panel has taken great interest in the drivers of Care, in particular why there are differences in perceptions of Care, and how it is used alongside other customer insight to guide our work.

This presentation provides an update on Care trends.

Slide 3: Reminder... Why Care?

Header text:

Organisations use a variety of metrics to determine whether they are performing in the eyes of their customers.

Common metrics include customer satisfaction and net promoter score.

Care has worked well for TfL, providing a holistic reflection of our performance.

Slide body text:

'TfL cares about its customers' is a good reflection of whether we consistently meet customers' expectations.

Measures overall perception and is influenced by all journeys, rather than the last journey - Though a bad journey lingers longer in the memory than many uneventful good ones.

Reflects more than just the on-network travel experience - People may reflect on interactions with the contact centre or website, reports in the media, views on the policies we're pursuing and consultations underway, as well as the experiences of friends, family and colleagues.

Good measure of customer confidence - Captures perceptions of all Londoners – not just customers. Capturing perceptions of those who haven't used our services is important for revenue generation and wider policy objectives.

We know what drives our Care score - Having tracked Care since 2012 we know with a degree of confidence what influences the score.

Slide 4: Reminder... Care progression.

Header text:

We've tracked Care since 2012 – with scores improving from the low 40s to the mid/high 50s
It behaves in a comprehensible way when viewed over longer time periods* – increasing during sustained periods of improvement and declining / plateauing when there are challenging times.

Chart description:

Chart shows the TfL Care score and the per cent of Londoners who agree that TfL cares about its customers, plotted quarterly. Dotted around the chart are events that may have positively or negatively impacted the score, such as the introduction of contactless payments on the network and tube strikes. The score starts at 43 in Q4 2012/13, and trends upwards, reaching 50 in Q2 2014/15. The score remains around the high forties until Q1 2017/18, before Q2 when it drops to 44. It trends steadily upwards for the next three years, peaking at 59 in Q1 2020/21. The score remains around the high fifties during the pandemic period, before dropping to 54 in Q1 2022/23. The score trends downward throughout 2022/23, reaching 51 in Q4, before returning to 54 in Q1 2023/24 where the chart ends.

Slide body text under the chart:

*The Care score is the product of many factors. It is not possible to quantify the precise contribution of different events or the exact reason for period-to-period changes.

Slide 5: Key drivers of Care over time.

Header text:

Analysis has identified the factors affecting Care. These have remained mostly consistent in terms of impact over time.

These drivers have generally moved along a similar trajectory to Care, though Londoners do reflect changes (perceived or real) in our circumstances (eg future investment).

Chart description:

Chart shows the movement of the TfL Care score and the metrics which have been determined to be its key drivers: 'TfL is an organisation I can trust,' 'TfL communicates openly and honestly,' 'TfL supports customers when things go wrong,' 'TfL is investing to improve my journeys,' and 'TfL has friendly and helpful staff.' Scores are plotted annually, starting in 2016/17. The chart shows that while the scores themselves may vary, all follow the same broad trends. They all increase from their 2016/17 levels and peak in 2020/21 before dropping back a little in 2021/22 and 2022/23. They seem to have increased a little in 2023/24 year-to-date, where this chart ends, but 2023/24 data is only based on Q1.

Chart caption: "How much do you agree or disagree with the following statements about TfL?" All Londoners (% NET AGREE). Sources: Reputation Tracker, 2016/17 – 2018/19. Customer Pulse 2019/20 onwards.

Slide 6: Deep dive: Care by users and non-users of public transport.

Chart description:

Chart shows two lines, the per cent of Londoners who have used public transport in the last week who agree that TfL cares about its customers, and the per cent of Londoners who have not used public transport in the last week who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The chart shows that the scores of those who have used public transport are consistently higher than those who have not.

Slide body text:

Londoners who have used PT in the past week score higher than those who haven't by an average of 11 per cent.

Londoners who have used PT's agreement that TfL cares is higher than those who haven't in all of the last 36 periods.

These figures may suggest a mismatch between perceptions and the reality of our PT service.

It may also reflect differences between perceptions of our core PT offer and our work in other areas.

Slide 7: Deep dive: Looking at Care by gender.

Chart description:

Chart shows two lines, the per cent of male Londoners who agree that TfL cares about its customers, and the per cent of female Londoners who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The chart shows that the scores of male Londoners are higher than female Londoners, with just a few exceptions.

Slide body text:

Female agreement with Care is on average five per cent lower than for males.

We know that issues relating to personal safety in public spaces are a factor.

However, this is not the sole reason for the difference.

A more inclusive approach to public transport planning and policies is needed to close this gap.

Slide 8: Deep dive: Generally, Inner Londoners' Care scores are higher. TfL services are typically more extensive in central and inner London.

Chart description:

Chart shows two lines, the per cent of those who live in inner London who agree that TfL cares about its customers, and the per cent of those who live in outer London who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The chart shows that initially the scores fluctuate and the lines frequently cross one another from one period to the next. However, in the post-pandemic period it is noticeable that the inner Londoner score is consistently higher, with just a couple of exceptions.

Slide body text:

Inner Londoners' agreement with Care is on average two per cent higher than Outer Londoners' (and has been as high as eight per cent).

However, this tends to fluctuate far more than the differences seen in other areas (eg gender).

Slide 9: Deep dive: Disabled Londoners are less likely to agree that TfL Cares than non-disabled Londoners.

Chart description:

Chart shows two lines, the per cent of disabled Londoners who agree that TfL cares about its customers, and the per cent of non-disabled Londoners who agree that TfL cares about its

customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The chart shows that the scores of non-disabled Londoners are consistently higher than disabled Londoners, with just one exception where the scores were the same.

Slide body text:

Disabled Londoners are on average six per cent less likely to agree that TfL Cares than non-disabled Londoners. That difference has been as high as 14 per cent.

Disabled customers have to overcome many barriers to use the public transport network – even when things are operating as planned.

We also know disabled Londoners are affected disproportionately when things go wrong We know some disabled Londoners have dismissed public transport as an option for them following previous bad experiences. They may not know that improvements have been made to services.

Source: TfL research, "Confidence and post pandemic experience for disabled customers" May 2022.

Slide 10: Deep dive: How do perceptions of Care differ for disabled Londoners who've used public transport versus those who haven't?

Chart description:

Chart shows two lines, the per cent of disabled Londoners who've used public transport in the last week who agree that TfL cares about its customers, and the per cent of disabled Londoners who haven't used public transport in the last week who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The chart shows that the scores of disabled Londoners who've used public transport are consistently higher than those who haven't used, with just a few exceptions.

Slide body text:

Disabled Londoners who've used public transport are on average 13 per cent more likely to agree that TfL Cares than those who haven't used public transport. That difference has been as high as 24 per cent.

The apparent mismatch between perceptions and reality appears slightly larger for disabled Londoners (13 per cent compared with 11 per cent for all Londoners).

Slide 11: Deep dive: Care score differences by Social Grade.

Social Grade is a classification system based on occupation and it enables a household and all its members to be classified according to the occupation of the Chief

Income Earner.

A: High managerial, administrative or professional
B: Intermediate managerial, administrative or professional
C1: Supervisory, clerical and junior managerial, administrative or professional
C2: Skilled manual workers
D: Semi and unskilled manual workers
E: State pensioners, casual or lowest grade workers, unemployed with state benefits only

Chart description:

Chart shows two lines, the per cent of Londoners in social grades ABC1 who agree that TfL cares about its customers, and the per cent of Londoners in social grades C2DE who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The chart shows that the scores of ABC1 Londoners are consistently higher than C2DE, with just two exceptions where scores were the same.

Slide body text:

ABC1 Londoners' agreement is on average five per cent higher than C2DE Londoners'.

ABC1 Londoners' agreement is higher in 34 of the last 36 periods.

It is thought this reflects a heavier reliance by C2DE Londoners on our services for critical trips, such as getting to work on-time.

If we let these customers down, whether that be due to delays or strikes, or when we raise fares, it is felt more acutely.

Slide 12: Deep dive: There isn't a strong link between Care and Ethnicity.

*Our data is weighted at the BAME / non-BAME level, and due to the limitations of the methodology (use of survey panels and sample sizes) does not allow analysis beyond that

Chart description:

Chart shows two lines, the per cent of Londoners from Black, Asian and minority ethnic (BAME) backgrounds who agree that TfL cares about its customers, and the per cent of Londoners from non-BAME backgrounds who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24. The lines frequently cross each other but are never too far apart.

Slide body text:

Londoners from Black, Asian and ethnic minority (BAME) backgrounds have very similar perceptions of Care to Londoners from non-BAME backgrounds (one per cent higher on average).

There is no significant link between ethnicity and Care.

Slide 13: Deep dive: Care by age group.

Chart description:

Chart shows four lines, the per cent of Londoners aged 16-34 who agree that TfL cares about its customers, the per cent of Londoners aged 35-54 who agree that TfL cares about its customers, the per cent of Londoners aged 55 plus who agree that TfL cares about its customers, as well as the per cent of all Londoners who agree that TfL cares about its customers. Scores are plotted periodically, starting in P7 2020/21 and ending in P3 2023/24.

Slide body text:

16-34-year-olds on average score three per cent higher than the average for all Londoners.

Age group has had as much as 16 per cent difference between groups (P6 2021/22, 16-34 67 per cent, 55+ 51 per cent).

55+ year olds on average score four per cent lower than the average for all Londoners
35-54-year-olds on average score the same as all Londoners.

Slide 14: Benchmarking:

Header text: How are we performing compared to others?

Customer satisfaction across the UK service sector is in decline.

Slide body text:

While our Care score is somewhat lower than it was during the pandemic, a challenging environment faced across the UK service sector means other organisations are seeing similar patterns:

Customer satisfaction across the whole UK fell to its lowest point in eight years in July 2023 according to the Institute of Customer Service.

Rising costs, industrial action, supply chain issues, skills shortages, recruitment and retention, and customers being affected by the cost-of-living crisis have probably all been factors in this decline in satisfaction.

Every sector from retailers to utilities has seen a decline in satisfaction in the past year.

However, Transport, currently ranked 11th out of 13 sectors saw a particularly significant decline, as did Utilities.

The Institute cites poor complaint handling, lower levels of 'getting it right first time,' and falling satisfaction with price in the rail sector as being significant factors.

Our ongoing focus on customers is therefore more important than ever during these challenging times.

Our last benchmarking study, comparing our Care score against other organisations, was in 2021. The pandemic was a key factor at the times, so scores are not especially relevant today.

Slide 15: Next steps.

Slide body text:

We will carry out another benchmarking survey in 2024 and will share the findings with the Panel.

Our ongoing focus on customers is more important than ever during these challenging times. Areas for action will be highlighted in our emerging Customer Strategy.

Care will remain a focus of our Customer Strategy and our key customer metric on the TfL scorecard.

We will continue to monitor the different perceptions of Care across our customer base.

Slide 16: APPENDIX: How we use the Care score.

Header text:

We use Care, along with other insight (eg complaints, CSS, mystery shopping) to identify customer pain-points and drive the organisation to focus on the things that matter most to customers.

Graphic shows two boxes at the bottom labelled 'Operational data' and 'Mystery shopping', both with arrows pointing to a middle box labelled 'CSS score.' The CSS Score box has an arrow pointing to a top box labelled 'Care score.'

Slide body text:

Care is part of a suite of metrics that are best used in conjunction with each other.

Care score: Our ultimate customer output measure.
A product of many factors, including operational performance, investment activity, policy interventions and wider perceptions of our role in London.
Are we focused on the right things and behaving in the right ways over the long-term?
Guides our strategic direction.

CSS score: In the moment customer view – their perception of how well we met their expectations on their last journey.
Are our efforts having the desired impact? Do we need to do more or something else?
Guides business planning and investment decisions.

Operational data / Mystery shopping: Objective assessment of how well we are performing against targets and standards. (eg reliability, cleanliness, staff helpfulness).
Guides management intervention and day-to-day focus.

Slide 17: APPENDIX: Recent Care performance.

Header text:

Although behind target for 23/24, our recent Care scores are broadly in-line with pre-pandemic levels.

During the pandemic, people appreciated our efforts to keep London moving. Those travelling also enjoyed quieter public transport services

Chart description:

Chart shows the TfL Care score and the per cent of Londoners who agree that TfL cares about its customers, plotted periodically. The chart starts at P1 2019/20 and ends at P3 2023/24. The chart area is split into three segments. The first is P1 2019/20 – P12 2019/20, labelled 'Pre-pandemic, 53% average.' The second is P13 2019/20 – P10 2021/22, labelled 'Pandemic, 57% average.' The third is P11 2021/22 – P3 2023/24, labelled 'Post-pandemic, 54% average.' The score fluctuates around the low-mid fifties in the pre-pandemic period, before climbing sharply and fluctuating around the mid-high fifties during the pandemic period. The score peaks at 62 before dropping back and fluctuating around the low-mid fifties again in the post-pandemic period.

Chart captions:

Pre-pandemic: Scores flatten out after sustained gains as tighter budgets limit large-scale improvements and put pressure on core performance.

Pandemic: We performed well during the pandemic and customers enjoyed quieter services.

Post-pandemic: As demand returns and services get busier scores have fallen back to pre-pandemic levels.

Slide body text:

The Care score is the product of many factors. It is not possible to quantify the precise contribution of different events or the exact reason for period-to-period changes However, from past experience, we believe the 2023/24 YTD Care score will have been positively affected by a period of more stable network performance. However, continued coverage of a turbulent industrial relations environment, air quality policies, and broader concerns about cost of living may have dampened performance.