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## **Secretariat memorandum**

Author: Bryan Davey

Agenda item: 15  
CAC019  
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### **CONFIDENTIAL**

#### **Casework questionnaire review**

## **1 Purpose of report**

- 1.1 At its last meeting, the Consumer Affairs Committee requested that consideration be given to reviewing the casework questionnaire with a view to enabling a more direct comparison between London TravelWatch and Passenger Focus.
- 1.2 We understand that a new manager has been appointed to lead the Passenger Advice Team at Passenger Focus and that she is, amongst other things, currently reviewing their questionnaire. Therefore, it is not advised that we make any changes to our questionnaire to make it more similar to theirs at this time.

## **2 Recommendation**

- 2.1 In view of the imminent changes being made to Passenger Focus' casework questionnaire, we consider that this report should be received for information at this stage.
- 2.2 Officers of London TravelWatch are asked to undertake discussions with Passenger Focus and investigate and report back to the Consumer Affairs Committee on the feasibility of a joint approach and to outline the proposed changes being made by Passenger Focus.

## **3 Background**

- 3.1 The current casework questionnaire was introduced in 1990 and originated from discussions with other consumer bodies about developing a common set of questions that could be asked in relation to complaint handling performance. The previous questionnaire was supplemented in 2007 to include additional questions about the type of complaint and the outcome, and additional monitoring information on the type of people complaining to us.
- 3.2 When the Casework Committee last considered the questionnaire, they specifically asked that we look at the current practice by Passenger Focus. At that time, Passenger Focus produced a lengthy questionnaire running to four pages which was sent to a sample of respondents. Since that time, their practice has changed significantly and they now produce a one page questionnaire which unlike ours is anonymous and excludes any monitoring information.

- 3.3 The Casework Committee decided at that time to continue to have a different questionnaire to Passenger Focus. At the time, there was a conscious choice made to retain a four point scale for questions (ranging from Very Satisfied to Very Dissatisfied) rather than a five point scale which would enable the inclusion of a “neither satisfied or dissatisfied” option and for use of mean scores rather than percentages. This was done in order to enable a consistent view of our performance over time and to discourage “fence sitting” replies.
- 3.4 Replies to Passenger Focus’ customer satisfaction survey are anonymous, whereas the reference number of the case is included on London TravelWatch’s casework questionnaire. The reason for this is that the questionnaire is linked to the case record, and it enables both positive and negative responses to be reviewed, escalation to the case and feedback to be provided to staff. I understand that the issue of anonymity is one area which may be further considered as part of the current review by Passenger Focus as they recognise that currently they are unable to ascertain why there has been a recent drop in passenger satisfaction.
- 3.5 When this issue was last considered in detail in 2007, Passenger Focus had a far longer and more detailed questionnaire than they do currently. Questionnaires were usually printed and sent out separately from their final replies, by post, within a month of the case being closed to a sample of the complainants. Currently, Passenger Focus send out a far simpler questionnaire (see attached) and, for the majority of cases, they use SurveyMonkey which enables questionnaire to be completed online via a web link and to send reminders by email.
- 3.6 London TravelWatch used the new casework database to send out surveys separately from final replies and also enables completion online through a link on the website (at [www.londontravelwatch.org.uk/questionnaire](http://www.londontravelwatch.org.uk/questionnaire)). When we changed the database, we considered that there could be benefit in separating sending the questionnaire out from the final reply. We considered that, in this way, it could be seen as separate and independent from the casework team. However, in practice, this process tends to lead to some delay in sending the questionnaire and may be one reason why we appear to have led a lower response rate than previously. We consider we may wish to review this aspect in the light of our experience.
- 3.7 At the time we last reviewed this issue, Passenger Focus recorded the age, sex and ethnicity of respondents. Members at the time considered that there would be benefit in recording such information. Since this decision was made, Passenger Focus have modified their questionnaire so that they no longer record this information. While this information has been helpful in understanding that there is some under-representation of ethnic minorities, young people and women amongst those responding to the casework questionnaire, members may wish to consider whether there is further utility in recording such information. The casework team is a reactive function and must deal with correspondence from wherever it originates and, because we do not monitor the sex or ethnicity of website users or those who make telephone enquiries to us, we currently have only a partial picture of those who use our services.
- 3.8 One advantage of maintaining the current set of questions is that we are able to take a consistent view of our performance over time. Changing any of the current set of questions (as opposed to supplementing them) would mean that historical comparisons

could not be made. Members should also note that reporting on current questions forms part of our Business Plan targets and is reported to the London Assembly.

- 3.9 We recognise that it continues to be difficult for complainants to distinguish between the failings of London TravelWatch and those of the operator when completing the questionnaire. Inevitably, the quality of our response to the complainant depends to a significant degree on the quality of the response that we receive from the operator. Similarly, if a complainant does not receive a substantive response to their complaint for two months, this may be due to a slow response from an operator or from the casework team.
- 3.10 Appended for information to this report are copies of London TravelWatch's and Passenger Focus' surveys.

#### **4 Equalities and inclusion implications**

- 4.1 It is possible that modifications to the questionnaire would allow more information to be gathered about the profile of complainants who seek the assistance of London TravelWatch. It is less clear whether the cost of doing so would be commensurate with its utility to the organisation.

#### **5 Legal powers**

- 5.1 Section 248 of the Greater London Authority Act 1999 places upon London TravelWatch (as the London Transport Users Committee) a duty to consider – and, where it appears to it to be desirable, to make representations with respect to – any matter affecting the services and facilities provided by Transport for London which relate to transport (other than freight) and which have been the subject of representations made to it by or on behalf of users of those services and facilities. Section 252A of the same Act (as amended by Schedule 6 of the Railways Act 2005) places a similar duty upon it in respect of representations received from users or potential users of railway passenger services provided wholly or partly within the London railway area.

#### **6 Financial implications**

- 6.1 Making modifications to the existing questionnaire would have some financial implications for London TravelWatch as they would they require programming changes for the database and website. These changes are likely to be cheaper than on previous database, but would still have a financial impact. While questionnaires could be separately recorded from the database, it would lead to increased manual recording of data.



## London TravelWatch

Please return your completed questionnaire in the freepost envelope provided, or to FREEPOST RLYG-JAUZ-SLZU, London TravelWatch, 6 Middle Street, London, EC1A 7JA. Or, if you prefer, complete the on-line questionnaire at [www.londontravelwatch.org.uk/questionnaire](http://www.londontravelwatch.org.uk/questionnaire)

### How did we do?

*Please tick the appropriate box*

How did you hear about us?

1. Have you ever contacted London TravelWatch before? Yes ☐ No ☐

2. How did you first hear about London TravelWatch?

- |   |                          |
|---|--------------------------|
| London TravelWatch leaflet                | <input type="checkbox"/> |
| Newspaper/magazine/radio/TV               | <input type="checkbox"/> |
| Notice at station                         | <input type="checkbox"/> |
| Notice on bus, tram, train, boat          | <input type="checkbox"/> |
| Timetable/bus map                         | <input type="checkbox"/> |
| London TravelWatch website                | <input type="checkbox"/> |
| Operator website                          | <input type="checkbox"/> |
| Other website                             | <input type="checkbox"/> |
| Transport provider or member of its staff | <input type="checkbox"/> |
| Word of mouth                             | <input type="checkbox"/> |
| Other (please specify below)              | <input type="checkbox"/> |

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3. What was your complaint about?

*Please tick one box only*

- |   |                          |
|---|--------------------------|
| Transport service performance                 | <input type="checkbox"/> |
| Staff conduct or availability                 | <input type="checkbox"/> |
| Sale of tickets, fares and refunds            | <input type="checkbox"/> |
| Information on vehicle, station or stop       | <input type="checkbox"/> |
| Information by phone, web or other provider   | <input type="checkbox"/> |
| Timetable                                     | <input type="checkbox"/> |
| Cleanliness of vehicle, station or facilities | <input type="checkbox"/> |
| Complaint handling by operator                | <input type="checkbox"/> |
| Safety and security                           | <input type="checkbox"/> |
| Travelling environment                        | <input type="checkbox"/> |
| Accessibility                                 | <input type="checkbox"/> |
| Other (please specify)                        | <input type="checkbox"/> |

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How well did we deal with your concerns?

4. How satisfied were you with the outcome of London TravelWatch's investigation into your concerns?

Very satisfied ☐ Fairly satisfied ☐ Dissatisfied ☐ Very dissatisfied ☐

If you weren't completely satisfied with the outcome of your complaint, please tell us why.

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5. How quickly did London TravelWatch deal with your concerns?

Very quickly ☐ Fairly quickly ☐ Slowly ☐ Much too slowly ☐

- 6 Leaving aside the outcome, how satisfied were you with the way London TravelWatch handled your concerns?
- Very satisfied ☐ Fairly satisfied ☐ Dissatisfied ☐ Very dissatisfied ☐
- Do you have any comments to make on the service you have received from London TravelWatch?
- .....
- .....

- 7 Would you recommend London TravelWatch to anyone else who had transport problems in and around London?
- Yes ☐ No ☐

#### About you

It would help us build a picture of who contacts London TravelWatch if you could answer some questions about yourself. *(London TravelWatch considers its obligations under the Data Protection Act 1998 and Freedom of Information Act 2000 and related legislation to be of paramount importance, and will only process personal data in accordance with the purposes notified to the Information Commissioner.)*

- |   |   |
|---|---|
| 1. Age  | 2. Type of transport user   |
| Under 18 <input type="checkbox"/>                             | Regular commuter (4+ days a week) <input type="checkbox"/>                |
| 18 – 24 <input type="checkbox"/>                              | Occasional commuter (1-3 days a week) <input type="checkbox"/>            |
| 25 – 34 <input type="checkbox"/>                              | Regular leisure user (once a month or more) <input type="checkbox"/>      |
| 35 – 44 <input type="checkbox"/>                              | Occasional leisure user (less than once a month) <input type="checkbox"/> |
| 45 – 54 <input type="checkbox"/>                              | Business user <input type="checkbox"/>                                    |
| 55 – 64 <input type="checkbox"/>                              | Other (please specify below) <input type="checkbox"/>                     |
| 65+ <input type="checkbox"/>                                  | .....   |
| 3. Gender   | 4. Disability   |
| Male <input type="checkbox"/>                                 | Do you consider yourself to have a disability?                            |
| Female <input type="checkbox"/>                               | Yes <input type="checkbox"/> No <input type="checkbox"/>                  |
| 5. Ethnic origin  | 6. Working status   |
| White – British <input type="checkbox"/>                      | Working full-time (30+ hours a week) <input type="checkbox"/>             |
| White – Irish <input type="checkbox"/>                        | Working part-time (→29 hours a week) <input type="checkbox"/>             |
| White – Other <input type="checkbox"/>                        | Retired <input type="checkbox"/>  |
| Black / Black British   | Unemployed <input type="checkbox"/>                                       |
| Black – Caribbean <input type="checkbox"/>                    | Student <input type="checkbox"/>  |
| Black – African <input type="checkbox"/>                      | Not working <input type="checkbox"/>                                      |
| Black – Other <input type="checkbox"/>                        | Other <input type="checkbox"/>  |
| Asian / Asian British   | 7. Type of ticket   |
| Asian – Bangladeshi <input type="checkbox"/>                  | Season ticket <input type="checkbox"/>                                    |
| Asian – Pakistani <input type="checkbox"/>                    | Oyster Pay-as-you-go <input type="checkbox"/>                             |
| Asian – Indian <input type="checkbox"/>                       | Travelcard <input type="checkbox"/>                                       |
| Asian – Other <input type="checkbox"/>                        | Ordinary Single / Return <input type="checkbox"/>                         |
| Chinese <input type="checkbox"/>                              | Freedom Pass <input type="checkbox"/>                                     |
| Other ethnic group <input type="checkbox"/>                   | Apex <input type="checkbox"/>   |
| Dual heritage (please specify below) <input type="checkbox"/> | Other (please specify below) <input type="checkbox"/>                     |
| .....   | .....   |

Thank you for taking the time to answer this questionnaire.

**Bryan Davey, Director, Public Liaison**

# How did we do?

We want to know how well we handled your contact with us. We would therefore be grateful if you could take a few moments of your time to complete and return this questionnaire...

The address is freepost so you don't need a stamp and we value all comments we receive

## 1 What was your contact with us about?

Mark all that apply

- Train delays / cancellations ☐ (1)
- Staff conduct / availability ☐ (2)
- Sale of tickets / fares and refunds ☐ (3)
- Information on trains / at stations ☐ (4)
- Train quality (i.e. conditions on board) ☐ (5)
- Timetabling and service connections ☐ (6)
- Station cleanliness / facilities ☐ (7)
- Complaint handling ☐ (8)
- Safety and security ☐ (9)
- National Rail Enquiries / other information providers ☐ (10)

## 2 How did you last contact Passenger Focus?

Mark one box only

- Telephone ☐ (1) Email ☐ (2)
- Letter ☐ (3) Fax ☐ (4) Other ☐ (5)

## 3 How did you hear about us?

Mark one box only

- TV/Radio ☐ (1) Station ☐ (2) Publications ☐ (3) Train ☐ (4)
- Referred by train company ☐ (5) Internet ☐ (6) Other ☐ (7)

## 4 How much do you agree or disagree with the following statements about how your contact with Passenger Focus was handled?

For any statements that do not apply to you, please put a cross (x) in the 'Don't know / not applicable' box below.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know / not applicable
It was easy to contact Passenger Focus	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
I was happy with the time it took to get through to someone who could help	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
The person I spoke to was polite and courteous	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
They empathised and understood my complaint	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
They were interested in my complaint	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
I was happy with the time it took to get a response / decision	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
They were helpful	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
They had the knowledge to deal with my complaint	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)

## 5 Overall, how satisfied / dissatisfied were you with the way your contact was handled by Passenger Focus?

	Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know
	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)

## 6 How satisfied / dissatisfied were you with the outcome of your contact?

	<input type="checkbox"/> (1)	<input type="checkbox"/> (2)	<input type="checkbox"/> (3)	<input type="checkbox"/> (4)	<input type="checkbox"/> (5)	<input type="checkbox"/> (6)
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Other comments:

Moisten gummed area before folding down this centre line

Passengerfocus

putting passengers first