Rail Delivery Group

Ticket Office Sales Mystery Shopping 2017

Report of Findings

December 2017

esa retail

Contents

1. Executive Summary

This report summarises the results of RDG's 2017 ticket office mystery shopping survey.

The 2017 Retail Mystery Shopper Ticket Office survey pass rate was 95.5%, a significant reduction on the 97.4% recorded last year and below the target of 96.5%.

The best performing scenarios were First Class and the Disabled Railcard scenario, both scoring 100%. Advance Purchase, Monthly Season and Travelling with Other Adults were the other scenarios that exceeded the 96.5% overall target.

There were two scenarios where scores were statistically different from last year – Turn Up and Go Return Same Day, which was lower than last year, and Frequent Traveller, which was higher.

The worst performing scenario was the Railcard Scenario with a score of 94.7%.

The main reasons for failure this year were associated with issuing the wrong type of ticket, in particular not selling a cheaper routed/dedicated ticket and selling off-peak tickets rather than more appropriate peak or super off-peak tickets.

There was a fall versus last year in instances of possible partial retailing.

Analysis of qualitative factors shows generally that performance improved over last year in a number of areas. Both queueing times and queue lengths improved over last year but the most significant deterioration came in clerks asking questions to confirm where the customer was travelling to and when they were departing. As last year, a general picture emerges of clerks being less likely to ask important confirmatory questions about the transaction. While less important to a customer's everyday travel needs, the significant decline in providing information on the Conditions of Carriage is also a cause for concern.

2. Introduction

The purpose of this report is to present the results of the 2017 Accurate and Impartial Retailing Survey.

In order to establish a consistent measure of Train Operating Company (TOC) performance over successive years, this year's methodology is broadly based on that used by ATOC/RDG since 1999. The sample design however, was altered in 2017 so as to more accurately reflect the relative importance of the different ticket sales channels.

2.1 Background

The underlying objective behind the Mystery Shopper Survey is to improve the accuracy of station ticket retailing. The purpose of the survey is to measure this, with the key output being a table of industry retail performance by scenario and an overall industry score.

The key principle underlying the design of the methodology is that accuracy of retailing at stations is sampled and evaluated in the research in a way that is reflective of current customer transactions. This has two implications for the survey:

- The transactions undertaken by the mystery shoppers are based on actual transactions as recorded in LENNON, the national rail ticket sales database;
- The results by scenario are weighted by the actual proportion of ticket issues for each scenario so that the overall weighted score reflects the mix of ticket issues.

The process involves generating plausible customer questions in different ticketing scenarios. These random scenarios are chosen based on the most current ticket data and the definitions are the same as 2016. The ticket purchases are split into scenarios using assumptions as laid out in section 2.3 below.

Note that there was a significant rebalancing of sample sizes for all three main forms of ticket retailing this year (Ticket Office, Ticket Vending Machines and Online) to better reflect the changing balance of rail retailing. This has meant a general reduction in ticket office sample sizes with a commensurate rise in TVM and online samples.

The table below summarises the scenarios and target sample sizes for 2017 compared with last year.

Scenario No.	Scenario Description	2017 target shops	2016 target shops
1a	Turn up & go, return same day. Priority = flexibility/speed	269	284
1b	Turn up & go, Single. Priority = flexibility/speed	136	99
1c	Turn up & go, Return same day. Priority = cost	14	12
1d	Turn up & go, Single. Priority = cost	6	5
2	Turn up & go return 7 days' time	270	274
3	First Class	9	11
4	Advance Purchase	85	132
5	Remote Sale	100	237
6a	Frequent Traveller (5 days a week)	17	105
6b	Frequent Traveller (4 days a week)	17	53
6c	Frequent Traveller (3 days a week)	18	52
7	Monthly Season Ticket	38	82
8	Travelling with other adults	81	230
9a	Railcard-Senior	83	151
9b	Railcard-Family & Friends	17	31
9c	Railcard-Network	28	41
9d	Railcard-16-25 year old	89	157
10	Disabled Traveller (using Disabled Persons Railcard)	23	44
Total		**1,300**	**2,000**

Table 1A – Comparison of Sample Sizes for 2017 and 2018

2.2 Scenario Definitions

The ten basic scenarios and their characteristics are shown below and are described in further detail following the table.

Scenario Number	Time of Travel	Return Date	Class	Customer Priority	Additional Factors
Turn Up and Go					
1	Immediate	Same day (or not if single)	Std	Journey time or cost	None
2	Immediate	7 days later	Std	Cost	Route & prices
First Class					
3	Immediate & Future	Same day	1st	Comfort	Discounts on advance
Advance purchase					
4	Two weeks' time, off-peak	7 days later	Std	Cost	None
Remote sale					
5	Next day	Same day	Std	Cost	Route & prices
Frequent Traveller					
6	From today	3,4 or 5 days in same week	Std	Cost	None
Monthly season ticket					
7	Immediate		Std	Monthly season ticket	Multi-modal options
Travelling with other adults					
8	Immediate	Same day	Std	Cost	Group ticket options
Railcard user					
9	Same day and future	Same day & future	Std	Cost	None
Disabled Railcard					
10	5 days' time	Same day & future	Std	Accessibility	Minimise interchanges

Table 1B – Scenario Definitions

Note: All scenarios involve return journeys except Season tickets and the single ticket sub-scenarios of scenario 1.

Scenario 1 – Turn Up & Go, Return Today or Single Ticket

This scenario is based around a requirement for immediate travel either returning today (1a) or asking for a single ticket (1b). Both 1a and 1b shoppers want maximum flexibility as to the departure of the next most convenient train and to the time of the return journey later in the day, in the case of 1a. 1c and 1d are sub-scenarios where a shopper asks for a return or single but a cheaper fare is more important than flexibility.

Scenario 2 – Turn Up & Go, Return in 7 Days' Time

This is very closely based on Scenario 1. The difference is that the return ticket is for 7 days' time and cost is the main criterion, rather than journey time. The return journey time can be flexible, so slower but cheaper routes may be offered.

Scenario 3 – First Class

This is the only scenario asking about First Class, and comfort becomes the principal criterion with cost the second. In other respects it is broadly similar to Scenario 1. The journey will be one where First Class is available for at least part of the route. A proportion of these are designated as "weekend" so that the availability of cheaper first class supplements like Weekend First can be tested.

Scenario 4 – Advance Purchase

The advance purchase scenario considers the case of purchasing a ticket a significant time in advance – typically two weeks – to allow sufficient time to qualify for advance purchase fares. Advance purchase fares are quota restricted and come with reservations for specific trains. The return journey was specified as seven days following outward travel. All shoppers asked the clerk whether the ticket being sold was an Advance ticket and the clerk's response was noted. Where the shopper was informed that the Advance quotas had been checked and were no longer available, the shop was deemed void.

Scenario 5 – Remote Sale

The exercise for this scenario involves buying a ticket to travel from a station other than the one at which the purchase is being made. The principal criterion is cost, so some options with cheaper but slower routes may be presented.

Scenario 6 – Frequent Traveller

This scenario involves a shopper travelling 3, 4 or 5 days for this week only (starting from today) and asking the clerk for the cheapest way of doing this. This scenario is designed to test the clerk's ability to check whether several day tickets is cheaper than a weekly season or whether Oyster Pay As You Go (PAYG) in London may be the cheapest option. As per last year, all mystery shoppers for this scenario had passport photos in their possession so that if they were not offered a season (when it was the cheapest option) it would be down to the clerk's error rather than the shopper's.

Scenario 7 – Monthly Season Ticket

The test involves advance purchase of a Monthly Season ticket with travel commencing from the following day. In London and Passenger Transport Executive (PTE) areas, integrated travel options (e.g. Travelcards) will be included.

Scenario 8 – Travelling with Other Adults

This scenario involves a shopper travelling with two other adults and asking the cheapest way of doing this. This is designed to test whether cheaper adult group options such as GroupSave are offered.

Scenario 9 – Railcard User

This is the only scenario involving purchases with railcards. The exercise involves 16-25, Senior, Family & Friends and (in the South East) Network Railcards. The Family & Friends Railcard option requires purchase of tickets for an adult and one child; the other three railcards involve the customer shopping for themselves or for a friend or relative travelling alone. For fieldwork purposes, this scenario is split into four, according to railcard. The Senior and Family & Friends sub-scenarios involve purchase of a ticket to return a week later while the 16-25 and Network sub-scenarios involve day return travel.

Scenario 10 – Disabled Railcard

This scenario involves buying a return ticket with a Disabled Railcard. It is designed to test the special needs of a passenger rather than merely speed, flexibility or cost. The shopper should be sold a ticket which minimises interchanges and has assistance available as well as a disabled toilet and these requirements take priority over other aspects such as cost.

2.3 Methodology

2.3.1 Sampling

Overall sample sizes were reduced this year with a total of 1,300 shops, down from 2,000 in 2017. This reduction resulted in a minor change to the sampling strategy.

- To ensure that each TOC was adequately represented in the sample, a fixed sample size was set for all TOCs was set at 73 (Approximately 1300 / 18).

In line with the two most recent surveys, in 2015 and 2016, there were three significant features to the methodology:

- There were no minimum sample sizes for scenarios so that scenarios could be selected at random based on ticket type. For this reason, there are much lower sample sizes for some scenarios such as First Class and Disabled Railcard;
- There was one restriction placed on scenario sample size. As before, a maximum of 400 Scenario 1 records was set to ensure that this scenario would not be too dominant in the sample. However, the impact of this scenario is then restored with the weighting process;
- For the purposes of scenario analysis, some records which were picked at random were permitted to count towards more than one scenario. For example, purchasing a Brighton-London ticket at Worthing ticket office with a 16-25 Railcard would, prior to 2015, have been allocated to the Remote Scenario and the railcard element removed. However, this year as in the past two years, the record was permitted within each scenario. This means that records available for scenario analysis are higher than the 1,300, improving statistical significance. Also, the survey is more representative as it takes into account more transactions with multiple facets. Although some records were allocated to more than one scenario, each record was given a primary scenario.

LENNON Data Collection

Information on annual ticket sales for year ending 31 March 2016 was obtained from the LENNON sales database for each ticket sales location for each retailing TOC. This was broken down by Ticket Type, Ticket Status (i.e. with or without Railcard, and adult or child), and associated journey origin and destination. Records with differences between ticket selling location and journey origin were used in conjunction with scenario 5. During this stage, the outputs were checked and the following sales points were removed:

- Ticket Vending Machines (TVMs) – these were shopped separately in the TVM part of the survey;
- Internet sales points – these were also shopped separately;
- Telesales offices;
- Business Travel Offices and Travel Centres;
- Any other non-ticket office sales points, such as portable ticket machines for on-train sales.

The remaining stations were checked in conjunction with the National Rail website to confirm that they were valid station ticket offices. Note that in some cases, a station will have more than one ticket office and each of these can appear separately in the sample if it has enough transactions. In a few cases, ticket offices at the same station are operated by different TOCs such as Euston (Virgin West Coast and London Midland) and Liverpool Lime Street (Northern and Merseyrail).

2.3.2 Scenarios

As the starting point, a disproportionate stratified sample was selected, using a maximum of 400 flows (where a flow is defined as a unique origin-destination-scenario combination) from Scenario 1, while the other scenarios were sampled in direct proportion to the ticket types and travel cards representing the scenario. Note that Scenario 1 is capped at 400 records as it represents a very significant proportion of transactions on the railway. Selecting flows directly in proportion would result in too many other scenarios with insufficient sample sizes for analysis purposes.

As the sample design is disproportionate, the overall pass rate was weighted by scenario at the analysis stage, to ensure it is a representative of all ticket types.

Although the methodology is not designed to measure retail accuracy by TOC, to ensure a representative spread of mystery shops across all TOCs, the sample size within each scenario for each TOC will be proportional to the corresponding ticket issues.

Allocating Flows to Scenarios

For each TOC, all Origin and Destination, Ticket Type and Status flows were downloaded from LENNON to MS Excel. Ticket flows were then allocated to scenarios based on the scenario

definitions. These were based on LENNON ticket type and status definitions with three exceptions:

- Scenarios 1c and 1d were based on choosing which of the Scenario 1 journeys could involve a cheaper dedicated or routed ticket based on checks using a combination of network and fares data;
- Frequent Traveller flows were taken from a sample of weekly season transactions within LENNON;
- Travelling with Other Adults flows were taken from a sample of tickets purchased with group ticket types.

For each scenario, a sample of flows was randomly selected from each TOC file. The sample size for each TOC and scenario pair was calculated proportional to the ticket sales of the scenario type in that TOC. As in previous surveys, this random sampling process was proportionate to the issues of each flow.

This year, given the reduction in overall sample size, the sample was spread evenly across all TOCS. This was done to ensure an adequate number of shops in each TOC. While results are not presented at TOC level, a minimum sample by TOC is desirable as sampling on a purely proportional basis would give tiny sample sizes for some TOCs.

A stratified sample is taken for each scenario, in each TOC, in direct proportion to the tickets sales for that scenario TOC pair. This ensures a representative sample by TOC and also provides an overall sample which will also be close to representative. TOC size and scenario spread differences across TOCs mean the overall sample is not an exact representative sample. An overall weighted sample result by scenario is calculated at the analysis stage to account for these differences.

Previously these scenarios would have been sampled at station level but as we require a fixed sample size for each scenario, it is much more efficient to randomly select them at TOC level. Additionally, as the sampling within scenarios is now completely random and not weighted, the sampling error is reduced.

However, as shown in the table below, there is a representative range of station sizes being sampled in 2017. This table shows the number of stations within each size band for the railway as a whole and the number surveyed within each size band.

Group Number	Ticket Issues Per Year	Number of Ticket Offices	Number of ticket offices sampled 2017
1	> 750,000	7	7
2	> 195,000	149	143
3	> 47,000	429	244
4	< 47,000	797	109
Total		**1,382**	**503**

Table 1C – Selected Station Ticket Offices by Group

Creating Scenario Weights

As noted earlier, the overall rail pass rate needs to reflect the number of different transactions by scenarios; i.e. it needs to be a weighted result across the different scenarios based on LENNON issues and any other relevant market research available. Our definition and assumptions used in calculating the weights by scenario are shown in the table below.

Scenario description	Scenario Number	Description
Turn Up and Go	1a	All Standard Class returns, non-advance purchase tickets, not from remote stations, not using a Railcard and travelling back the same day.
	1b	All Standard Class singles, non-advance purchase tickets, not from remote stations, not using a Railcard.
	2	All Standard Class, non-advance purchase return tickets, not using a Railcard and able to stay away at least one day.
First Class	3	All First Class tickets excluding seasons and advance purchase products.
Advance Purchase	4	All advance purchase tickets.
Remote Sale	5	Based on proportions from large sample of LENNON records studied as part of the Scenario Review (2010)
Frequent Traveller	6	Based on proportions from National Passenger Survey and National Rail Travel Survey analysis (2010)
Monthly season	7	All Standard Class season tickets with a validity of between 30 and 89 days.
Travelling with other adults	8	Based on proportions from large sample of LENNON records studied as part of the scenario review (2010)
Railcard User	9	All Standard Class tickets, non-advance purchase stations, using one of the 4 major railcards.
Disabled Railcard	10	All Standard Class tickets, non-advance purchase, not from remote stations, using a Disabled Railcard.

Table 1D – Definition of Scenario Weights

Note: Apart from Scenarios 9 and 10, all tickets are at public adult rate.

Reality check

Once all the mystery shop records had been selected each record was checked to ensure that the ticket type and journey were compatible, for instance, to ensure that a same day return ticket was not bought for a journey between Portsmouth and Aberdeen. This is a very important concern, because any unusual ticket requests may alert the ticket office to the presence of a mystery shopper.

2.3.3 Fieldwork and Marking

Line By Line (LBL) provided ESA with a set of survey records. As well as carrying out the shops, ESA also marked the shops, with any that they were unsure of being sent to RDG for further adjudication.

Spreadsheets which contained data on each completed transaction were sent from ESA to RDG and LBL. LBL then sent those that were marked fails to the relevant TOCs for comment.

As in previous years, electronic copies of the actual tickets purchased were sent with the failure information.

After the return of these records from TOCs, RDG made a further adjudication when TOCs had disputed a particular record. The data was then sent onto Line By Line for analysis of failure rates and reasons for failure.

3. Analysis of Results

3.1 Response Rates

Just three (0.2%) of the 1,300 mystery shops were not completed successfully, leaving 1,297 completed transactions (99.8% response rate) for analysis. This is significantly higher than last year (98.5%) and higher still than 2015 (97.9%). The reasons for the reduction from 1,300 were:

- One instance of a ticket office closure (0.1% of the proposed sample), compared with 0.6% of last year's sample, i.e. where no transaction took place because a ticket office was closed during its advertised opening hours. Because the transaction itself had not failed, these records were not classified as "retail" failures, but were removed from the analysis sample.
- There were also two records (0.2%) where transactions were considered "void" because it was unclear from the shopper records whether they were passes or fails. This is a better position than last year where this figure was 0.6%.

A breakdown of the completed shops by scenario is shown below.

Scenario Number	Scenario Description	Sample size	Completed	Response rate
1	Turn up and go, single or return same day	425	424	99.8%
2	Turn up and go, return 7 days	270	269	99.6%
3	First Class	9	9	100.0%
4	Advance Purchase	85	85	100.0%
5	Remote Sale	100	100	100.0%
6	Frequent Traveller	52	52	100.0%
7	Monthly Season ticket	38	38	100.0%
8	Travelling with other adults	81	80	98.8%
9	Railcard	217	217	100.0%
10	Disabled Railcard	23	23	100.0%
Overall		**1,300**	**1,297**	**99.8%**

Table 2 – Completed Transactions by Scenario (based on primary scenario)

3.2 Ticket Accuracy (Pass Rates)

The 1,297 completed shops were used to calculate the proportion of successful mystery shop transactions. These figures were broken down by scenario. As noted earlier, to ensure that the overall industry result was a true reflection of the actual mix of ticket types purchased, the success rates were weighted using LENNON ticket issues data from the year ending March 2017.

Confidence intervals are shown in the table below to demonstrate whether pass rates are statistically significant - if the (absolute) difference between the pass rates is greater than the confidence interval then the difference is said to be "statistically significant". Statistical significance means that any differences are likely to reflect actual behaviour changes as opposed to random fluctuations or "scatter" in the pass rate data such as might result from choosing a different sample of stations or survey dates (e.g. staff may differ).

As per previous years, the target pass rate was 96.5%. The overall (all-scenario) score of 95.5% this year is below this target but with a confidence interval of 1.1%, this result is not quite statistically significant.

The overall score of 95.5% is however well below last year's score of 97.4% and this difference is statistically significant.

The table below shows that on an individual scenario level, there are two scenarios that are significantly different from last year – significance defined as the difference between the 2017 pass rate and the 2016 pass rate being higher than the confidence interval. The statistically significant scenarios are shown in italics – Scenario 1, which is the largest scenario, is significantly worse than last year, while Scenario 6 is significantly better than last year. Because of the weight of Scenario 1 within the total survey, the reduction this year in its score is a major factor in the decline in the all scenario score.

Scenario Number	Scenario Description	Pass Rate 2017	95% Confidence Interval 2017	Sample Size 2017	Pass Rate 2016
1	*Turn up and go, single or return same day*	95.1%	2.0%	445	99.0%
2	Turn up and go, return 7 days	95.9%	2.4%	269	96.3%
3	First Class	100.0%	n/a	9	91.7%
4	Advance Purchase	98.0%	2.7%	100	96.1%
5	Remote Sale	95.0%	4.3%	100	95.3%
6	*Frequent Traveller*	96.2%	5.2%	52	89.4%
7	Monthly Season Ticket	97.4%	5.1%	38	95.0%
8	Travelling with other adults	97.6%	3.3%	82	95.3%
9	Railcard	94.7%	3.0%	209	97.1%
10	Disabled Railcard	100.0%	n/a	25	100.0%
Overall		95.5%	1.1%	1,329	**97.4%**

Table 3 – Mystery Shopper Success Rates by Scenario

As last year, sample sizes were too small to enable statistically robust analysis by TOC. However, more disaggregate analysis of pass rates was undertaken on a sector basis with TOCs divided between Long Distance, London and South East and Regional.

The table below shows the pass rates by sector with Regional TOCs scoring highest; however, none of the differences between the TOCs are statistically significant and neither are the differences over 2016. Note however that all three sectors had statistically significant improvements on 2015.

Sector	Pass rate 2017	Pass rate 2016	Pass rate 2015	Statistical significance (2017 vs 2016)
Long Distance	95.3%	95.3%	91.3%	No
London & South East	95.5%	95.0%	91.7%	No
Regional	96.9%	96.8%	95.0%	No

Table 4 – Unweighted Pass Rates by Sector

3.3 Reasons for Failure Analysis

Using data gained from the marking stage, those records which were marked as "failures" were analysed.

The table below shows the analysis of reasons for failure by scenario.

	Scenario										
Reason for failure	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**Total**
Cheaper routed ticket not sold	7	3	0	0	0	0	0	0	2	0	**12**
Off-peak rather than peak	4	3	0	0	0	0	0	0	0	0	**7**
Off-peak rather than super off-peak	2	2	0	1	1	0	0	0	0	0	**6**
Routed ticket rather than Any Permitted	4	0	0	0	0	0	0	0	0	0	**4**
Incorrect date of travel	0	0	0	1	1	0	0	0	1	0	**3**
Multimodal rather than rail only	2	0	0	0	0	1	0	0	0	0	**3**
Peak rather than off-peak	2	0	0	0	0	0	0	0	1	0	**3**
Single instead of return	0	2	0	0	0	0	0	0	1	0	**3**
Cheaper group ticket not sold	0	0	0	0	0	0	0	2	0	0	**2**
Incorrect destination	1	0	0	0	0	0	1	0	0	0	**2**
Incorrect discount applied	0	0	0	0	1	0	0	0	1	0	**2**
Refused to sell ticket	0	0	0	0	1	0	0	0	1	0	**2**
Day tickets rather than cheaper weekly	0	0	0	0	0	1	0	0	0	0	**1**
Multiple tickets rather than one ticket	0	0	0	0	1	0	0	0	0	0	**1**
Period return rather than day return	0	0	0	0	0	0	0	0	1	0	**1**
Rail only rather than multimodal	0	0	0	0	0	0	0	0	1	0	**1**
Tickets sold don't cover full journey	0	1	0	0	0	0	0	0	0	0	**1**
Total	**22**	**11**	**0**	**2**	**5**	**2**	**1**	**2**	**9**	**0**	**54**

Table 5 – Reasons for Failure by Scenario.

The most significant failure this year was that of not selling a cheaper routed ticket, which accounted for nearly a quarter of all failures. This is a similar proportion to last year's survey. There were also two categories where an off-peak was sold rather than more appropriate peak or super off-peak tickets. These three reasons account for nearly half of all failures in 2017.

However, there was a fall in some categories over last year; in particular day tickets rather than a weekly ticket and applying an incorrect discount (usually in the railcard or group scenarios).

As with previous years, we also split the type of failure into one of three groups:

- **Transaction failures** – where a clerk refused to sell a ticket without sufficient reason. While there were two instances this year, even allowing for the reduction in sample

size, this is slightly better than the four last year. Note that mystery shoppers are instructed to persist in trying to buy a ticket even if the clerk initially advises against.

- **Pricing failures** – where the correct ticket was sold but at the wrong price. This includes selling tickets in the Railcard scenario at the wrong discount and selling tickets for more than one (adult) traveller without an appropriate group discount. There were four instances of pricing failure this year, compared with 15 last year. Of the four failures, two were associated with the Travelling with other Adults scenario (scenario 8).
- **Ticket failures** – where a ticket was sold but it was incorrect or inappropriate to the scenario for various reasons. This was by far the most common type of failure this year, accounting for 48 of the 54 failures. As noted earlier, not selling a cheaper routed/dedicated ticket was the single most common failure but there were also many instances of other failures, such as selling a routed ticket where the scenario demanded a more flexible Any Permitted routing.

Reasons for failure for each scenario are now discussed in further detail.

Turn Up and Go Scenarios

As per previous years, Scenario 1 was split into four sub-scenarios: -

- 1a (Turn up and go, return same day - flexibility);
- 1b (Turn up and go, single journey - flexibility);
- 1c (Turn up and go, return same day - wanting cheapest ticket); and
- 1d (Turn up and go, single journey - wanting cheapest ticket).

There were 12 failures within scenario 1a, compared with only one last year, resulting in a pass rate of 95.5% for this sub-scenario – significantly lower than last year's 99.6%. The failures were dominated by selling off-peak tickets rather than more appropriate peak or super off-peak tickets and by selling routed tickets where an Any Permitted routeing was more appropriate to the scenario. The decline in this scenario, which has the largest weight of any scenario, had a significant impact in reducing the overall score.

Scenario 1b had three failures this year (97.7%) compared with none last year. This sub-scenario should be the highest scoring scenario as it is the most straightforward of all.

Scenarios 1c and 1d are more complex scenarios as they are testing the clerk's ability to sell cheaper but often slower or less convenient "turn up and go" tickets. Reflecting the relative rarity of these scenarios amongst the general public, few shops of these types were undertaken. As a result, the five failures recorded in 1c mean that the overall score for this sub-scenario was only 87% while 1d recorded only 78%. All of the failures in 1c and 1d were associated with not selling a cheaper routed ticket.

Scenario 2, Turn Up and Go but Return a Week Later, recorded 95.9% this year, not significantly different from the 96.3% last year. As seen in Table 5 above, most of the failures were associated with cheaper dedicated or cheaper routed tickets not being offered or with

selling off-peak tickets rather than more appropriate peak (which were more flexible) or super off-peak tickets (which were cheaper).

First Class

There were no failures in this scenario in 2017. This appears a significant improvement on last year; however, the sample sizes were low for both years and only one failure was recorded last year.

Advance Purchase

This scenario score of 98% was an improvement on last year's score of 96.1%, although the difference is not statistically significant. In both failures in this scenario in 2017, while an advance product was not available for the trains/dates requested for the customer, the failures resulted from other factors – i.e. incorrect date and selling off-peak rather than a cheaper super off-peak.

Remote Sale

This scenario was similar to last year (95% vs 95.3%). There were five failures this year, although there was no dominating reason for failure.

This is one of the more complex scenarios and it is interesting to note that there were no cases this year of getting an incorrect origin, the reason for failure that one might most expect. It is possible, however, that with the clerk concentrating on getting the origin correct, it makes it more likely that errors will occur elsewhere.

Frequent Traveller

As shown in Table 3, this was the only scenario which showed a statistically significant improvement on last year. There were only two failures this year compared with 23 last year. In particular, there was a major reduction in selling several day return tickets rather than a cheaper weekly season. There was only one case of that this year compared with 16 last year.

Monthly Season Ticket

This scenario improved on last year although this difference was statistically insignificant. Only one failure was recorded this year – an incorrect destination.

Travelling with other Adults

This scenario scored higher than last year, although this improvement was not statistically significant. The two failures this year were both associated with not selling a cheaper group ticket.

Railcards

This scenario scored lower than last year but the reduction was not statistically significant. There were a number of different reasons for failure this year and failing to provide the correct discount was only one out of nine recorded reasons.

This scenario is split between four sub-scenarios, the Senior, Family and Friends, Network and 16-25 Railcards. This year three of the railcards scored similarly at around 96%; however, the

Family and Friends sub-scenario scored only 87.5%. While this appears a big difference, owing to small sample sizes, this difference is still not statistically significant.

Disabled Railcard

This scenario was the highest scoring this year with 100%. This was the same as last year.

3.4 Station Size Analysis

Analysis by station ticket office size was undertaken this year comparing station ticket offices with over 200,000 issues per year versus outlets with less than 200,000. The table below shows that while small stations appear to perform better (as was the case last year) this year the difference is not statistically significant.

Ticket Office Size	Pass rate	Sample size	Confidence Interval
Large	95.4%	712	1.5%
Small	96.4%	585	1.5%

Table 6 – Pass Rates by Ticket Office Size

Note: These pass rates are unweighted.

3.5 Level of Partial Retailing

There was a small amount of evidence for potential partial retailing in 2017. Partial retailing is defined to have taken place where the retailing TOC issued a ticket with a route which was not appropriate to the scenario and in doing so may have affected the earnings of other "carrier" TOCs who operate between the same origin and destination. In particular, these instances can occur when:

- the retailing TOC sells the "any permitted" route rather than a cheaper routed ticket (where a competitor TOC may have gained more), as the scenario demanded;
- the retailing TOC sells a cheaper routed ticket (where their own TOC stands to gain more) rather than the more flexible "any permitted" route as the scenario demanded.

There were four instances of "1", but no instances of "2". Each of the instances of "1" were within the 12 "Cheaper routed/dedicated ticket not sold" transactions identified in Table 8. There is no evidence of any deliberate strategy by a TOC to increase its earnings through partial retailing; indeed, there is a fall in this over last year (beyond that expected owing to the fall in sample size) where nine instances were recorded.

3.6 Analysis of Quality Factors

The Retail Mystery Shopper survey also collects information on several "quality-type" factors. These are now analysed in total and by sector and station size where relevant and any significant conclusions are drawn.

3.6.1 Ticket Office Closures

There was only one case of ticket office closure in the survey this year. In this case, the ticket office was under reconstruction.

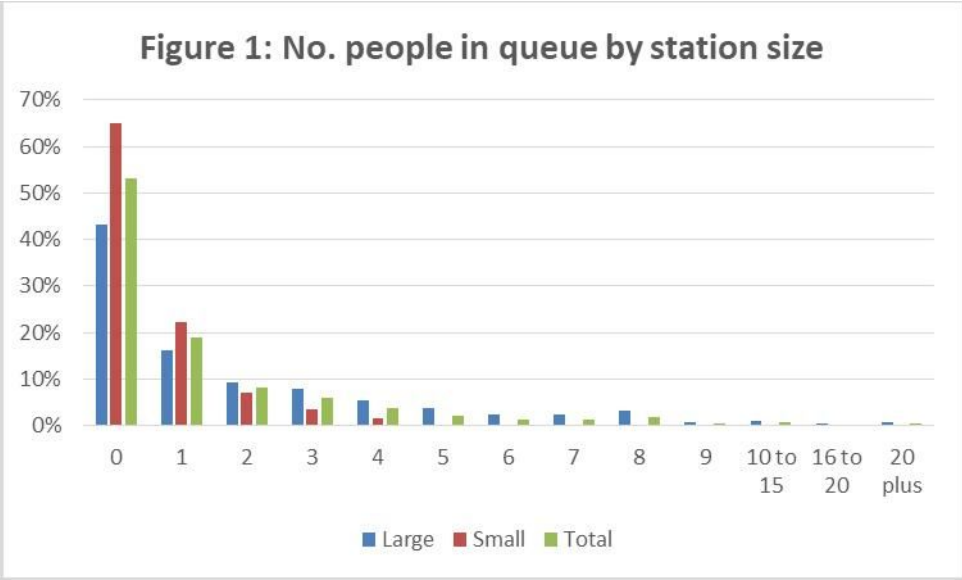
This is a significant improvement on last year where there 12 examples of ticket office closure.

3.6.2 Queuing Data

Two measures of queuing were recorded in the survey:

- Numbers of people ahead in the queue – a measure of queue length
- Number of minutes waiting to be served (after arrival at station) – a measure of queuing time.

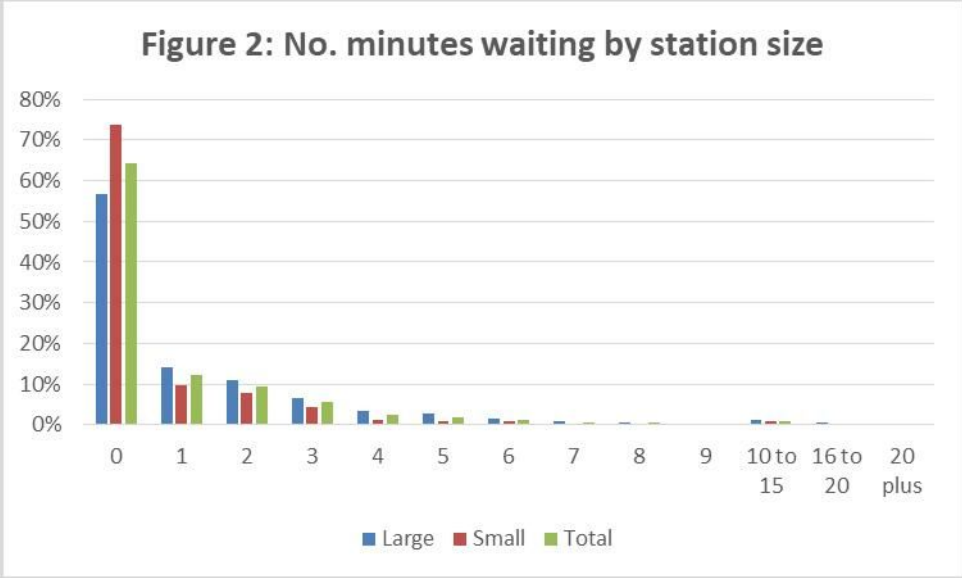
The average number of people in the queue ahead of the shopper on arrival was 1.4, below the figures of 1.8 for last year and 1.6 for 2015 (see Table 10). The average of 1.4, though, hides a significant amount of variation as shown in Figure 1 below. Over 80% of the shoppers in the 2017 survey had no one or only one person ahead of them in the queue. However, the long tail on this distribution (seen almost totally at the larger stations) pushes the average up to 1.4.



The average number ahead in the queue is strongly correlated with station ticket office size with larger ticket offices having longer average queue lengths (see Table 7).

Ticket Office size	2017	2016	2015
Large	2.1	3.1	2.6
Small	0.6	0.7	0.5
Total	**1.4**	**1.8**	**1.6**

Table 7 – No. in Queue by Ticket Office Size



A similar pattern is observed in the average number of minutes waiting to be served. The average is 1.1 minutes but the distribution of this shown in Figure 2 is very similar to that in Figure 1 with over half having to wait only a minute. As queue length is longer at larger ticket offices, so is queuing time as shown in Table 8.

Table 8 also shows that as with queue length there has been a significant reduction in the average minutes waiting to be served – lower than both 2016 and 2015.

Ticket Office size	2017	2016	2015
Large	1.5	2.2	1.9
Small	0.7	1.2	1.0
Total	**1.1**	**1.6**	**1.4**

Table 8 – Average Minutes Waiting by Ticket Office Size

3.6.4 Clerk's Questions and Actions – Outward Journey

The Mystery Shopper surveys for 2017 contained a number of yes/no fields on whether the ticket clerk asked the shopper particular questions or undertook particular actions. This sub-section deals with questions that the clerk might be expected to ask about the passenger's outward journey. Note that in some cases, some scenarios have been excluded from these analyses – for example, the Monthly Season Ticket scenario, Frequent Traveller and the Turn Up and Go flexibility scenarios (1a and 1b) are not scenarios where travelling earlier/later are relevant.

Table 9 below shows that in only just over a third of the cases does the clerk attempt to confirm where the passenger wants to travel and in less than two thirds of cases when they want to travel. However, these proportions drop considerably for options that might involve the passenger getting a cheaper ticket using some alternative route, especially for slower trains and for journeys that might involve changes. The lower percentages probably reflect the fact the clerk is likely to know that for some particular transactions there are no appropriate cheaper tickets associated with changing time of travel, using a slow service, changing trains, and/or taking a different route. Note that there is no statistically significant difference between large and small stations for any indicators in this table.

Clerk asked:	Large	Small	Total
Exactly where going	35.6%	38.0%	36.7%
When departing	63.9%	63.1%	63.6%
Can you travel earlier/later	24.2%	20.3%	22.5%
Can you take a slower service	5.1%	3.7%	4.5%
Would you mind changing trains	5.1%	5.1%	5.1%
Which route are you taking	8.3%	11.1%	9.5%

Table 9 – Questions Asked (Outward Journey) by Station Size

Note: Detailed question wording is adjusted according to the scenario, but these results reflect transactions across all relevant scenarios.

Comparing these numbers with 2016 figures (Table 10) shows that clerks appear to be significantly better than 2016 at asking questions about the outward journey, especially in the where and when of the outward journey. Further analysis shows that the poor performance in the "when" is similar across all relevant scenarios.

Clerk asked:	2017	2016	Statistical significance
Exactly where going	36.7%	33.2%	Yes
When departing	63.6%	58.0%	Yes
Can you travel earlier/later	22.5%	17.0%	Yes
Can you take a slower service	4.5%	4.3%	No
Would you mind changing trains	5.1%	4.7%	No
Which route are you taking	9.5%	9.0%	No

Table 10 – Questions Asked (Outward Journey) by Year

Note: Detailed question wording is adjusted according to the scenario, but these results reflect transactions across all relevant scenarios.

3.6.5 Clerk's Questions and Actions – Return Journey Leg

This sub-section deals with questions that the clerk might be expected to ask about the passenger's return journey. Note that as in 7.3 above, some scenarios have been excluded – for example, the monthly season ticket scenario and the turn up and go flexibility scenarios (1a and 1b) are not scenarios where coming back at specific times are relevant.

Table 11 below shows that in around 62% of cases, the clerk is trying to ascertain when the passenger is coming back. However, this proportion drops to under 40% for time of day returning and 40% for confirming the restrictions on the return journey. In terms of differences between large and small stations, the difference in the proportion of clerks making the restrictions clear is statistically significant.

Clerk asked:	Large	Small	Total
When coming back	63.2%	61.3%	62.3%
Time of day returning	40.4%	38.2%	39.5%
Restrictions on return journey made clear	43.5%	35.0%	40.0%

Table 11 – Questions Asked (Return Journey) by Station Size

Note: Detailed question wording is adjusted according to the scenario, but these results reflect transactions across all relevant scenarios.

When compared with 2016, Table 12 below shows that in asking about when coming back is similar to last year apart from making the restrictions clear which is better than last year and the difference is statistically significant.

Clerk asked:	2017	2016	Statistical significance
When coming back	62.3%	63.2%	No
Time of day returning	39.5%	37.1%	No
Restrictions on return journey made clear	40.0%	30.4%	Yes

Table 12 – Questions Asked (Return Journey) by Year

Note: Detailed question wording is adjusted according to the scenario, but these results reflect transactions across all relevant scenarios.

3.6.6 Clerk's Questions and Actions – Cheaper Ticket

This sub-section deals with questions that the clerk might be expected to ask specifically about cheaper tickets which may be gained from departing later, travelling by a slower route, changing trains or being offered an off-peak return. As above, these questions are only relevant to some scenarios (and also are not necessarily relevant to every transaction within the selected scenarios).

Generally, Table 13 below shows that the proportions of the time that the clerk suggested these options are very low. In some cases, of course, a cheaper ticket may not be a realistic option; nevertheless, the proportions when a cheaper option is available is still likely to be higher than the results below, apart from the off-peak return option. Note that despite some differences between large and small stations in Table 13 that none of these differences are statistically significant.

Clerk asked:	Large	Small	Total
Cheaper ticket – departing later	12.6%	10.7%	11.8%
Cheaper ticket – slower route	4.0%	3.3%	3.7%
Cheaper ticket – changing trains	1.6%	3.0%	2.1%
Cheaper ticket – off-peak return	56.3%	52.0%	54.6%

Table 13 – Questions Asked about Cheaper Tickets – by Station Size

Despite the individual proportions being relatively low, however, there is one area where performance has significantly improved over last year – asking about a cheaper ticket which departed later (Table 14). Otherwise, results are very similar to last year.

Clerk asked:	2017	2016	Statistical significance
Cheaper ticket – departing later	11.8%	8.9%	Yes
Cheaper ticket – slower route	3.7%	3.8%	No
Cheaper ticket – changing trains	2.1%	2.1%	No
Cheaper ticket – off-peak return	54.6%	54.9%	No

Table 14 – Questions Asked about Cheaper Tickets – by Year

3.6.7 Clerk's Questions and Actions – Railcards

This sub-section deals with two specific questions over railcards (see Tables 15 and 16):

- Asking if the passenger had a railcard; and/or
- Suggesting the passenger buy a railcard to reduce the journey cost.

As per other questions in these sections, this analysis was confined to relevant scenarios.

In terms of asking whether the customer had a railcard, the 24.5% scored here is higher than 2016 but this difference is not statistically significant. The proportion of times when the clerk suggested that the passenger buy a railcard to reduce the cost of the journey is very small at 1.6%, although this is even lower than last year's score (albeit not a significant difference).

Clerk asked:	Large	Small	Total
Asked if had railcard	25.5%	22.7%	24.5%
Suggested buying railcard to reduce journey cost	1.6%	1.7%	1.6%

Table 15 – Questions Asked about Railcards – by Station Size

Clerk asked:	2017	2016	Statistical significance
Asked if had railcard	24.5%	20.9%	No
Suggested buying railcard to reduce journey cost	1.6%	2.0%	No

Table 16 – Questions Asked about Railcards – by Year

3.6.8 Conditions of Carriage

As in the previous five years, a designated proportion of the shops involved the shopper also requesting to see the national conditions of carriage. Table 17 below shows that in just over 92% of transactions where the conditions were requested, a positive response was given (examples of positive responses are shown in Table 18). The difference between large and small ticket offices here is not statistically significant.

	Large	Small	Total
Proportion	93.6%	90.9%	92.3%

Table 17 – Clerk Gave Positive Response on Conditions of Carriage – by Station Size

Table 18 below shows, however, that the proportion of positive responses given by clerks has improved significantly from 2016. Amongst the non-positive responses, there were however still some cases where the clerk confused Conditions of Carriage with Passengers' Charter, along with a few cases where the clerk clearly did not know what the Conditions of Carriage were.

Table 18 also shows that the advice given by clerks is concentrated on advising the customer to either consult the National Rail website (www.nationalrail.co.uk) or the TOC's own website.

Positive response to question	2017	2016
Advised to visit website	84.7%	59.7%
Given hard copy	4.7%	13.2%
Other	0.0%	2.8%
Hard copy to look at but had to give back	2.8%	1.4%
Total	**92.3%**	**77.1%**

Table 18 – Range of Positive Responses on Conditions of Carriage – by Year

3.6.10 Actions to Improve TOC Retailing

Based on this year's survey, actions within the following areas would most help improve TOC retail performance:

- Improving awareness amongst staff of the cheaper dedicated or routed tickets that may be available for journeys sold from each ticket office. Staff should not make assumptions on a customers' behalf as to whether time of travel, length of journey or number of changes outweigh potential cost savings. Similarly, the clerk should not sell customers a more expensive flexible return ticket because they feel they do not have the time to exactly identify the customer's requirements for the return journey leg;
- Improving concentration or checking by staff so that it is established that the customer wants either the most flexible or cheapest ticket.
- Encourage a culture among clerks of asking confirmatory questions, for example, the clerk repeating the customer's request, in order to confirm:
    - When the customer wants to depart;
    - where the customer wants to travel to; and
    - when the customer wants to return.
- Improving staff awareness of the Conditions of Carriage, where they can be accessed and what distinguishes them from other rail regulations such as the Passengers' Charter.

Train Ticket Mystery Shopping 2017 - Ticket Office	
Location: **Date of Assessment:** **Time of Assessment:**	
Visit Information	
Q1. Interviewer name	
Q3. Date of mystery shop	
Q4. Day of mystery shop	( ) Monday ( ) Tuesday ( ) Wednesday ( ) Thurs day ( ) Friday ( ) Saturday ( ) Sunday
Q5. Time of arrival at station	
Q6. Was the ticket office open?	( ) Yes (1) ( ) No (0)
Q7. If ticket office closed: was there any information on why the office was closed?	( ) Yes (1) ( ) No (0)
Q8. What did the information say?	
Q9. What time did you join the queue?	
Q10. How many people were ahead of you in the queue when you joined?	
Q11. How many minutes did you have to wait to be served?	
Q12. At what time was your transaction completed?	
Were you asked any of the following about your outward journey at any time during the transaction?	
Q13. Exactly where you were going? E.g. if you stated London as your destination were you asked for the actual station?	( ) Yes (1) ( ) No (0)
Q14. When you were departing?	( ) Yes (1) ( ) No (0)
Q15. If you could travel at an earlier/later time of day?	( ) Yes (1) ( ) No (0)
Q16. If you would be willing to take a slower service?	( ) Yes (1) ( ) No (0)
Q17. If you would mind changing trains?	( ) Yes (1) ( ) No (0)
Q18. What route you were taking?	( ) Yes (1) ( ) No (0)
Were you asked any of the following about your return journey at any time during the transaction?	
Q19. When you were coming back?	( ) Yes (1) ( ) No (0)
Q20. What time of day you would be returning?	( ) Yes (1) ( ) No (0)
Q20a. What time of day you would be returning each day?	( ) Yes (1) ( ) No (0)
Q21. Were you told your return journey could be made any time?	( ) Yes (1) ( ) No (0)
Q21a. Did the clerk make clear what restrictions, if any, applied to the return ticket?	( ) Yes (1) ( ) No (0)
Q21c - Were you told your return journey could be made any time on each day?	( ) Yes (1) ( ) No (0)
Railcards	
Q22. Were you asked at any stage if you had a Railcard?	( ) Yes (1) ( ) No (0)
Q23. Did they suggest that you should buy a Railcard in order to obtain the cheapest ticket for this journey?	( ) Yes (1) ( ) No (0)
Details of your request	

Q24a) - What ticket did you ask for?	
1. Q24 ai) Please enter the Start and Finish locations you requested at the Ticket Office	
2. Q24 aii) Please enter the travel date/s you requested at the Ticket Office	
3. Q24 aiii) Please enter the time of travel you requested at the Ticket Office (or the general time of day you indicated).	
Q24b) - Please state what ticket choices you were offered by the Clerk. (please recall exactly what choices were offered to you and list the ticket types in the box provided).	
Q24bi) Please provide a comment stating what ticket/s you chose from this list.	
Were you offered any of the following?	
Q24. A cheaper ticket departing later	**( ) Yes** (1) **( ) No** (0)
Q25. A cheaper ticket on a slower route	**( ) Yes** (1) **( ) No** (0)
Q26. A cheaper ticket changing trains	**( ) Yes** (1) **( ) No** (0)
Q27. An off-peak return	**( ) Yes** (1) **( ) No** (0)
Q27a. An Oyster Card	**( ) Yes** (1) **( ) No** (0)
Q27b. An off-peak single	**( ) Yes** (1) **( ) No** (0)
Q27c. A First Class off-peak return	**( ) Yes** (1) **( ) No** (0)
Q27d. An advance purchase ticket	**( ) Yes** (1) **( ) No** (0)
Q28. Any other cheaper ticket	**( ) Yes ( ) No**
Q29a. What other cheaper ticket were you offered?	
Q29b. Did they check the availability of a disabled toilet for your journey?	**( ) Yes** (1) **( ) No** (0)
Q29c. Did they offer to make an special arrangements for your journey? (if they do, please accept)	**( ) Yes** (1) **( ) No** (0)
Q29d. Did they actually make these arrangements for you?	**( ) Yes** (1) **( ) No** (0)
Q30. Were you asked any other questions?	**( ) Yes** (1) **( ) No** (0)
Q30b. Did the ticket clerk warn you about any service disruption and/or advise you of a replacement bus for all/part of the journey?	**( ) Yes** (1) **( ) No** (0)
Q31. Were you offered any other information?	**( ) Yes** (1) **( ) No** (0)
Q32. Did you purchase a ticket?	**( ) Yes** (1) **( ) No** (0)
Q33. If 'No' was it because...	**( ) They refused to sell you the ticket (please comment below)** (0) **( ) You were told to purchase the ticket on the train** (0) **( ) The Clerk said there were no tickets available** (0) **( ) Was there any other reason - if so, please comment**
Q33g. Did you ask whether this was an Advance ticket?	**( ) Yes** (1) **( ) No** (0)
Q34. Do you believe you were given the right ticket?	**( ) Yes** (1) **( ) No** (0)
Q35. If 'No' was it because...	**( ) You asked for a return and were sold a single ( ) Other (please comment)**
Q35a. Were you offered a seat reservation with this ticket?	**( ) Yes** (1) **( ) No** (0)
Q35b. Did the clerk give you a seat reservation?	**( ) Yes** (1) **( ) No** (0)
Q36a. Please provide us with the name of the ticket clerk that served you.	
Q36ai). Please type in the description of the Ticket Clerk below	**[ ] N/A**
Q36b. Please provide any other information you would like to give about your transaction which has not been covered in the questionnaire in the space below.	**[ ] N/A**
Q37a. Ticket type provided by Clerk.	

Q37b. Ticket Type - adult	
Q37c. Ticket type - child	
Q38a. Ticket number of first ticket (outward journey)	
Q38b. Ticket number of adult ticket (outward journey)	
Q38c. Ticket number of child ticket (outward journey)	
Q39. Ticket number of second ticket (return journey)	
Q39a. Please insert any other ticket numbers below, if applicable	
Q39ai. Outward day/adult 2	
Q39aii. Outward day/adult 3	
Q39aiii. Outward day/adult 4	
Q39aiv. Outward day 5	
Q39bi. Return day/adult 2	
Q39bii. Return day/adult 3	
Q39biii. Return day/adult 4	
Q39biv. Return day 5	
Q39c. Ticket number of adult ticket (return journey)	
Q39d. Ticket number of child ticket (return journey)	
Q40. Ticket price	
Q40b. Child ticket price 1	
Q41. Second ticket price	
Q41b. Child ticket price 2	
Q42. Station leaving from	
Q43. Station going to	
Q44. Via which station(s)/route	
Q44a. Outward trip reservation details:	
Q44ai. Date train leaving	
Q44aii. Time train leaving	
Q44aiii. Coach	
Q44aiv. Seat	
Q44b. Return trip reservation details:	
Q44bi. Date train leaving	
Q44bii. Time train leaving	
Q44biii. Coach	
Q44biv. Seat	
Q45. Did you ask the clerk where you could find a copy of The National Rail Conditions of Carriage?	**( ) No** (0) **( ) Yes,given hard copy** (0) **( ) Yes, shown hard copy to look at, but gave it back to clerk** (0) **( ) Yes, advised to visit www.nationalrail.co.uk** (0) **( ) Yes, other (please specify)** (0)
Overall comments - Please provide a few comments informing us your experience at the Ticket Office	
Was there any terminology used by the clerk that you did not understand? (please write in your comments and include examples of any jargon terms that you found confusing during the process)	
What was the one improvement you would like to see being implemented to make the experience at the ticket office efficient and easy? (Please write in your full comments and	

include the biggest challenge/s you faced when using the ticket office)	