

## National Rail 2014 Mystery Shopping Survey results

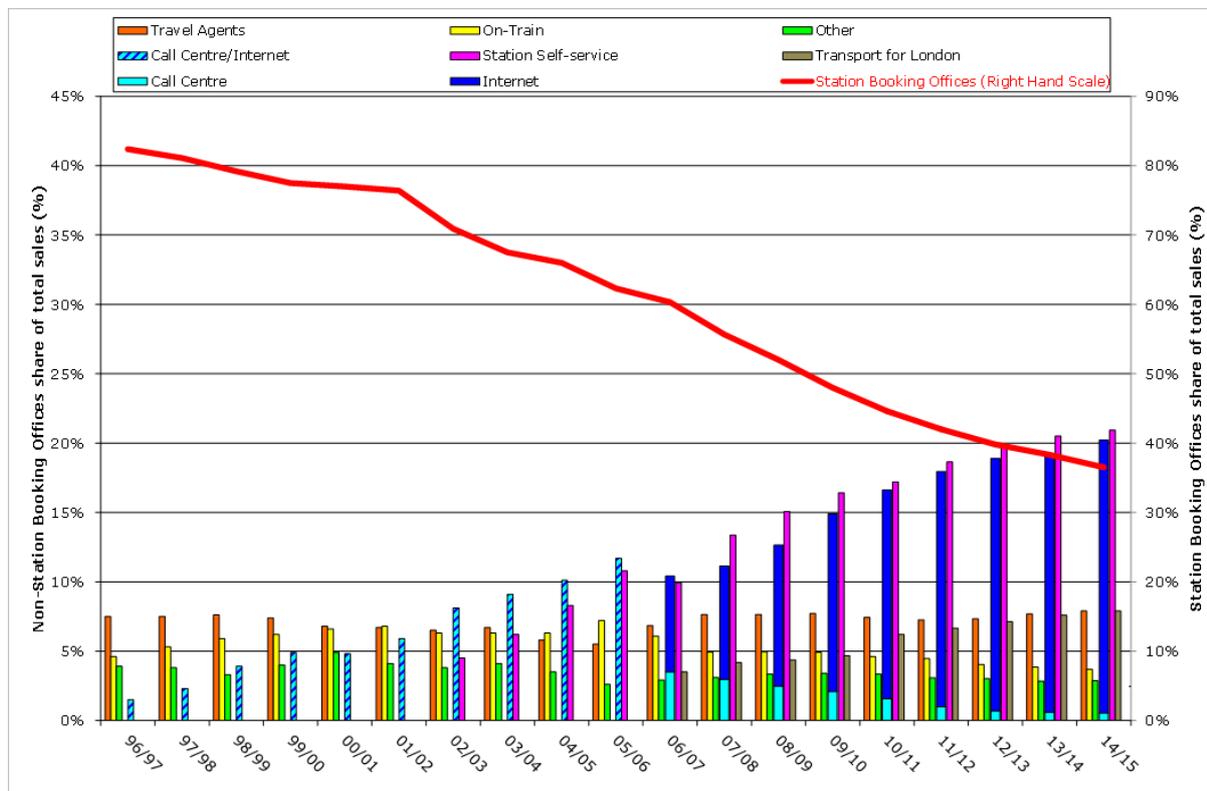
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## 1. Introduction

The National Rail Mystery Shopping surveys are designed to measure the accuracy and impartiality of retailing by Train Operators on a national basis. The surveys are undertaken each year across station ticket offices, Ticket Vending Machines (TVMs) and TOC internet sites using representative sample purchases to provide an overall percentage figure of accurate sales for each channel. Sales data from LENNON is used to ensure that the location and weighting of the scenarios, and other factors, such as Railcard use, reflect the national distribution of sales.

The chart below shows recent trends in ticket sales distribution by channel. From this it can be seen that the three channels surveyed represent the dominant means of sales for rail travel in Great Britain.



Samples sizes and scenarios are provided by Transport Strategies Ltd (TSL), who also produced the results report for the Ticket Office surveys. The fieldwork for all surveys is carried out by ESA Ltd, who also produce the TVM and Online survey results report.

## 2. Mystery Shopping results summary

### 2.1 Ticket Offices

- 2.1.1 2,000 mystery shops were carried out across a range of locations providing a representative balance of small, medium and large stations with staffed ticket offices. This produced a pass rate of **95%** (i.e. the correct product being sold for the given scenario).
- 2.1.2 The best performing scenarios were the Monthly Season Ticket and Turn up and go, Return Same Day scenarios, with both scoring 96% or higher. The worst performing scenario was the Frequent Traveler scenario with a score of 87.4%, followed by the Remote Sale scenario which had a score of 91.9%.
- 2.1.3 Where failures occurred, the main reasons were associated with issuing the wrong type of ticket, in particular not selling a cheaper routed/dedicated ticket and selling for the wrong time period. There was an increase in the selling of day returns instead of cheaper weekly tickets and vice versa, with the numbers here being closer to the results to the 2012 round.

### 2.2 Ticket Vending Machines

- 2.2.1 200 mystery shops were carried out across a range of locations selected to provide a national cross section of stations with high TVM usage. The scenarios are set to reflect current national TVM purchasing characteristics and therefore it is assumed all tickets are required for immediate travel.
- 2.2.2 A pass rate of **91%** was achieved for the correct product being sold.
- 2.2.3 The total time the shopper takes to complete their TVM purchase did not show a clear correlation with the ability to obtain the correct ticket, although shoppers more experienced with using TVM machines had shorter transaction times (just under two minutes) than those least experienced (4minutes and over).
- 2.2.4 The survey results indicate that purchasing tickets from a TVM is a reliable solution for the large majority of customers and that even those with limited experience in using ticket machines should have few difficulties in obtaining a correct ticket.
- 2.2.5 On average, the total TVM transaction time (excluding queuing) was 2 minutes 20 seconds.
- 2.2.6 The majority of users found it easy to find information on ticket types and conditions, and were satisfied with the information when found. Only 4% of shoppers cited terminology they didn't understand. The two most common suggested improvement to the user experience of TVM's was better touch screen sensitivity and the facility to see all ticket information at once on one page.

## **2.3 Online sales**

- 2.3.1 236 mystery shops were carried out across all the TOC internet sites. The scenarios were broken down to ensure fulfillment via a representative range of options – collect from TVM; collect from ticket office; delivery by post; and print at home; and covered all of the main types of tickets.
- 2.3.2 A pass rate of 88% was achieved for the correct product being sold on TOC ticketing websites.
- 2.3.3 1 in 10 customers, (93%), of the sample, felt confident that they had been able to purchase the correct ticket. Interestingly, those purchasing Senior Railcards reported the highest confident levels but had the lowest accuracy in actually purchasing the correct ticket, with a success rate of 81% compared to 88% for the sample as a whole. The ability to see all cost and time details on one screen was the highest scoring attribute behind participants selecting a website.
- 2.3.4 Over 89% of customers stated that their chosen website was either satisfactory or very satisfactory in terms of security, efficiency and ease of use. Furthermore, over 96% of customers stated that their chosen website was welcoming, modern and appropriate for a rail ticket website.
- 2.3.5 1 in 10 customers were satisfied with how information on ticket types and conditions was displayed on their chosen website and 94% stated that they were also satisfied with the clarity of the online instructions of how to use the website(s).

### 3. National Ticket Office Mystery Shopping survey results

#### 3.1 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 2013. The ticket purchases are split into scenarios using assumptions laid out in section 4.

In order to help provide more statistically robust scores at a scenario level, there was an increase in the overall proposed sample size over last year from 1,855 to 2,000. Within this overall increase there were particular increases for the Frequent Traveller and Travelling with other Adults scenarios which had relatively poor scores last year. The proposed sample sizes compared to last year are summarised in Table 1 below.

**Table 1: Comparison of sample sizes for 2014 and 2013**

Scenario No.	Scenario Description	2014 target shops	2013 target shops
1a	Turn up & go, return same day. Priority = flexibility/speed	343	290
1b	Turn up & go, Single. Priority = flexibility/speed	127	134
1c	Turn up & go, Return same day. Priority = cost	14	17
1d	Turn up & go, Single. Priority = cost	7	9
2	Turn up & go return 7 days' time	175	159
3	First Class	142	151
4	Advance Purchase	180	193
5	Remote Sale	174	184
6a	Frequent traveller (5 days a week)	104	66
6b	Frequent traveller (4 days a week)	66	67
6c	Frequent traveller (3 days a week)	73	67
7	Monthly or longer season ticket	119	110
8	Travelling with other adults	165	110
9a	Railcard-Senior	67	63
9b	Railcard-Family & Friends	14	9
9c	Railcard-Network	20	20
9d	Railcard-16-25 year old	80	86
10	Disabled traveller (using Disabled Persons Railcard)	130	120
<b>Total</b>		<b>2,000</b>	<b>1,855</b>

### 3.2 Scenario Definitions

The ten basic scenarios and their characteristics are shown in Table 2 below and described in further detail following the table.

**Table 2: Definition of the Ten Scenarios**

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	1 <sup>st</sup>	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

Note that 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 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.

### **3.3 Methodology Summary**

#### **3.3.1 LENNON Data Collection**

Information on annual ticket sales for year ending 31 March 2014 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:

- Sportis machines
- Ticket Vending Machines (TVMs) – note that these were shopped separately as part of another exercise
- Telesales offices
- Business Travel Offices and travel centers
- Any other non-station sales points, especially Internet.

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).

#### **3.3.2 Scenario methodology**

This year's methodology was in line with last year's methodology. Accordingly we selected a disproportionate stratified sample, selecting a minimum of 100 flows (where a flow is defined as a unique origin-destination-scenario combination) from each of the scenarios. However, some scenarios were given a higher sample size. These fell into two categories:

- Those with a lower than average pass rate, such as Frequent Traveller. All other things being equal, a scenario with a lower pass rate will have a higher confidence interval; and
- Those which contained several sub-scenarios (such as Scenario 1 or Railcards) where a higher sample size would allow some analysis of these sub-scenarios.

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 (see section 4.4).

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

### 3.3.3 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 (as shown in Table 4 below) with three exceptions:

- Scenarios 1c and 1d were based on choosing which of the 491 Scenario 1 journeys could involve a cheaper dedicated or routed ticket based on checks using Avantix fares software.
- Frequent Traveller flows were taken from a sample of weekly season records;
- Travelling with other adults flows were taken from a sample of Scenario 1 journeys. 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.

As last year, a minimum sample size requirement for each TOC was also stipulated by ATOC. To accommodate this in the sampling plan the sampling was split into two sections. An initial sample was selected that achieved the minimum requirements for each scenario in direct proportion to ticket sales within that scenario. As the second stage a number of extra flows were selected for those TOCs which did not achieve the minimum sample size in stage 1. This involved a small number of flow samples so has a very minimal impact on the representative breakdown of the sample

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 Table 3 below, there is a representative range of station sizes being sampled in 2014. 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.

**Table 3: Selected station ticket offices by group**

Group Number	Ticket Issues Per Year	Number of Ticket Offices	Number of ticket offices sampled 2014
1	> 750,000	13	13
2	> 195,000	189	176
3	> 47,000	536	336
4	< 47,000	634	173
<b>Total</b>		<b>1,372</b>	<b>698</b>

### 3.4 Creation of 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.

**Table 4: Definition of scenario weights**

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, not from remote 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.

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

### 3.4.1 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.

### 3.5 Fieldwork and Marking

Line by Line (LBL) provided the fieldwork company, 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 ATOC for further adjudication.

Spreadsheets which contained data on each completed transaction were sent from the fieldwork company to ATOC and LBL. LBL then sent those that were marked fails to 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, ATOC made a further adjudication when TOCs had disputed a particular record. The data was then sent onto LBL for analysis of failure rates and reasons for failure.

### 3.6 Analysis of Results

#### 3.6.1 Response Rates

46 of the 2,000 (2.3%) of the mystery shopper were not completed successfully, leaving 1,954 completed transactions (97.7% response rate) for analysis. This is higher than last year (97%) but lower than 2012 (99%). The main reasons for the reduction from 2,000 to 1,954 were as follows:

- Seven records (0.35% of the proposed sample) were removed 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. More on these records is shown in section 7.1. This proportion of closures is slightly less than that recorded last year (0.4%).
- There were five cases where the transaction did not take place because station staff insisted that the ticket be bought on Oyster so a transaction could not take place there and then;
- There were two cases where the ticket could not be purchased because Advance tickets were not sold at the ticket office
- There were six cases where a ticket was not sold owing to various system errors or constraints such as inability to buy Docklands Light Railway (DLR) or Metro tickets at a station;

- The remaining 26 (1.3%) records were cases of transactions being 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 2.2%.

A breakdown of the completed shops by scenario is shown in Table 5 below. The lowest response rates were in three scenarios, Frequent Traveller, Monthly Season Ticket, and Advance Purchase. Typically, scenarios 4 and 6 have had the lowest response rates as these are often the most complex scenarios where a lot of information from both the shopper and clerk is required. However, scenario 7 (Monthly Season ticket) is not normally in this group and partly reflects the Oyster issues described earlier.

**Table 5: Completed transactions by scenario**

Scenario Number	Scenario Description	Sample size	Completed	Response rate
1	Turn up and go, return same day	491	489	99.6%
2	Turn up and go, return 7 days	175	174	99.4%
3	First Class	142	138	97.2%
4	Advance Purchase	180	172	95.6%
5	Remote Sale	174	173	99.4%
6	Frequent Traveller	243	230	94.7%
7	Monthly Season ticket	119	114	95.8%
8	Travelling with other adults	165	162	98.2%
9	Railcard	181	175	96.7%
10	Disabled Railcard	130	127	97.7%
<b>Overall</b>		<b>2,000</b>	<b>1,954</b>	<b>97.7%</b>

### 3.6.2 Success Rates

The 1,954 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 2014.

Table 6 contains these results and the associated 95% confidence intervals. Confidence intervals are shown in Table 6 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 behavior 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% this year is below this target and with a confidence interval of 1%, this result is statistically significant.

The overall score of 95% is below last year’s score of 96% - this result is borderline statistically significant.

Table 6 shows that on an individual scenario level, the Turn Up & Go Return Same Day, Frequent Traveller and Disabled Railcard scenarios were all significantly worse than last year – significance defined as the difference between the 2014 pass rate and the 2013 pass rate being higher than or the same as the confidence interval. There are several scenarios, e.g., Scenario 2, which are better than last year but none where the difference is statistically significant.

**Table 6: Mystery Shopper Success Rates by scenario**

Scenario Number	Scenario Description	Pass rate 2014	95% Confidence Interval 2014	Sample Size 2014	Pass rate 2013
1	Turn up and go, return same day	<b>96.1%</b>	1.7%	489	97.8%
2	Turn up and go, return 7 days	94.3%	3.5%	174	93.7%
3	First Class	95.7%	3.4%	138	<i>94.6%</i>
4	Advance Purchase	94.8%	3.3%	172	94.6%
5	Remote Sale	91.9%	4.1%	173	92.3%
6	Frequent Traveller	<b>87.4%</b>	4.3%	230	93.4%
7	Monthly Season ticket	97.4%	2.9%	114	98.0%
8	Travelling with other adults	93.2%	3.9%	162	93.6%
9	Railcard	94.3%	3.4%	175	94.2%
10	Disabled Railcard	<b>95.3%</b>	3.7%	127	99.1%
<b>Overall</b>		<b>95.0%</b>	<b>1.0%</b>	<b>1,954</b>	<b>96.0%</b>

Note: 2014 pass rates which are statistically different from last year are shown in bold and italic.

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.

Table 7 below shows the pass rates by sector with Long Distance TOCs scoring highest. While the difference between Long Distance and Regional is statistically significant, there are other no statistically significant differences between the sectors. Some of the differences between sectors reflect the different scenarios for each sector – for example, Long Distance TOCs have fewer Frequent Traveller shops (the lowest scoring scenario). Similarly, while sector performance looks worse than last year, these differences are not statistically significant.

**Table 7: Unweighted pass rates by industry sector**

Sector	Pass rate 2014	Pass rate 2013	Pass rate 2012
Long Distance	95.8%	97.6%	98.0%
London & South East	93.6%	94.6%	95.5%
Regional	93.1%	94.9%	91.7%

### 3.6.3 Reasons for failure analysis

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

Table 8 below shows the analysis of reasons for failure by scenario.

**Table 8: Reasons for failure by type of failure and scenario**

Reason for failure	1	2	3	4	5	6	7	8	9	10	Total
Advance not sold	-	-	-	1	-	-	-	-	-	-	1
Advance rather than cheaper off-peak	-	-	-	1	-	-	-	-	-	-	1
Cheaper routed/dedicated ticket not sold	8	8	3	5	6	3	1	-	4	1	39
Day tickets rather than cheaper weekly	-	-	-	-	-	10	-	-	-	-	10
Incorrect date on ticket	-	-	-	1	1	-	-	-	-	1	3
Incorrect destination	4	-	-	-	2	-	-	1	-	-	7

Incorrect discount applied	-	-	-	-	-	-	-	-	8	3	-	11
Incorrect number of tickets	-	-	-	-	-	1	-	-	1	-	-	2
Incorrect origin	-	-	-	-	1	-	-	-	-	-	-	1
Multimodal rather than cheaper rail only	1	-	-	-	-	2	-	-	-	-	-	3
Off-peak rather than peak	-	2	-	-	-	-	-	-	-	-	-	2
Peak rather than cheaper off-peak	1	-	-	-	2	-	-	-	-	3	2	8
Rail only rather than multimodal	-	-	-	-	-	1	1	-	-	-	-	2
Refused to sell ticket	-	-	-	-	-	2	1	-	-	-	1	4
Return instead of single	3	-	-	-	-	-	-	-	-	-	-	3
Single instead of return	2	-	-	1	2	-	-	1	-	-	1	7
Standard rather than First	-	-	3	-	-	-	-	-	-	-	-	3
Weekly rather than cheaper day tickets	-	-	-	-	-	10	-	-	-	-	-	10
<b>Grand Total</b>	<b>19</b>	<b>10</b>	<b>6</b>	<b>9</b>	<b>14</b>	<b>29</b>	<b>3</b>	<b>11</b>	<b>10</b>	<b>6</b>	<b>117</b>	

The table also shows that the single largest type of failure was not selling a cheaper routed or dedicated ticket which occurred most often in Scenarios 1 and 2. 39 of the 117 failures overall (i.e. a third) arose from this type of failure. As a proportion of total records, this was nearly a doubling on last year's incidence of this type of failure.

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 no instances of this last year, there were four this 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 traveller without an appropriate group discount. There were 11 instances of pricing failure this year, compared with only five last year. Of the 11 failures, only three were associated with the Railcard scenario (scenario 9) while the majority came from 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 102 of the 117 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, especially selling a weekly season rather than cheaper day tickets or selling day tickets rather than a cheaper weekly season.

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 ten failures within scenario 1a, resulting in a pass rate of 97.1% for this sub-scenario – a similar score to last year's 97.2%. Four of the ten failures were for not selling a cheaper routed or dedicated ticket and three were for selling to an incorrect destination.

Scenario 1b scored five failures (and a score of 96%) this year compared with none last year. This is a disappointing result as this sub-scenario is the most straightforward of all and is one of the main reasons why Scenario 1 overall was significantly down on last year. Three of the five failures were for a clerk selling a return rather than the single requested.

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, meaning that although three fails were recorded in Scenario 1c and only one fail in 1d were recorded for these sub-scenarios, this led to scores of 78.6% and 85.7%, respectively. All of the failures in 1c and 1d were for not selling a cheaper routed or dedicated ticket.

Scenario 2 which is Turn Up and Go but Return a Week Later recorded 94.3% this year, up on the 93.7% last year, although not a statistically significant improvement. As noted above, most of the failures were associated with cheaper dedicated or cheaper routed tickets not being offered.

### **First Class**

Like Scenario 2, this scenario recorded an improvement on last year, although not a statistically significant one. There were two reasons for failure which occurred equally – selling a Standard rather a First Class ticket, and not selling a cheaper routed/dedicated ticket.

### **Advance Purchase**

This scenario score of 94.8% was almost identical to last year's score, although the reasons for failure changed significantly. There were nine failures this year, mainly cases of not selling a cheaper routed/dedicated ticket. However, in previous years not offering cheaper Advance tickets was the main reason.

### **Remote Sale**

This scenario was the second lowest scoring scenario this year, recording a reduction on last year, although this change was not statistically significant. There were 14 failures this year, dominated by not selling a cheaper routed/dedicated ticket.

This is one of the more complex scenarios and it is interesting to note that there was only one case 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 6, this was the worst scoring scenario this year, recording a statistically significant reduction on last year, although a very similar score to 2012. Of the 29 failures recorded, ten involved selling several day return tickets rather than a cheaper weekly season and a further ten cases involved the reverse situation – selling a weekly season rather than cheaper day tickets.

Note that, as in the previous year, the marking regime for this scenario has taken a deliberate hard line over price. There are some cases where there was very little difference between the cheapest option and the ticket(s) that the customer was issued. While in these cases, the price difference may only be a few pence, the marking regime is guided by what is in the customer's benefit.

Finally, this scenario was split into three sub-scenarios involving travel 3, 4 or 5 times a week. Travelling three or four times a week had higher pass rates (92.8% and 87.7%, respectively) than travelling five times a week (only 83.3%). This is a surprising result as travelling five days a week should make the weekly season ticket the cheapest ticket in every case (unless compared with five off-peak returns which may be cheaper in some cases but are not appropriate to the flexibility asked for in the scenario). However, in the five days a week sub-scenario, there were seven cases where day returns were sold rather than a cheaper weekly season ticket.

### **Monthly Season Ticket**

This scenario was the highest scoring this year, recording only three failures, the same as last year. The failures were not selling cheaper routed/dedicated ticket, selling a rail only ticket rather than the multimodal ticket requested and refusal to sell a ticket.

### **Travelling with other Adults**

This scenario scored similarly to last year. The failures were dominated by not selling the tickets with a group discount which was available for the journey in question.

## Railcards

This scenario scored almost identically to last year. Failures were dominated by not selling a cheaper routed/dedicated ticket and applying the wrong discount (not applying the 34% discount at all in the three cases this year).

This scenario is split between four sub-scenarios, the Senior, Family and Friends, Network and 16-25 Railcards. As last year, no failures were recorded in the Family and Friends sub-scenario, although this has a smaller sample. The 16-25 sub-scenario scored 97.4% compared with the Network scoring 95% and the Senior scoring only 89.2%.

## Disabled Railcard

The score for this scenario declined significantly compared with last year where it was the highest scoring scenario. There were six failures this year (compared to one last year) with failures ranging from not selling a cheaper routed/dedicated ticket, a peak ticket rather than a cheaper off-peak ticket, selling a single rather than a return and refusing to sell a ticket. There were no failures in applying the railcard discount in this scenario.

### 3.6.5 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. Table 9 below shows that there is a small significant difference in pass rates between ticket offices based on the 2014 data (i.e., the difference between the pass rates is lower than the confidence interval), suggesting that smaller stations have a slightly higher pass rate.

**Table 9: Pass rates by ticket office size**

Ticket Office Size	Pass rate	Sample size	Confidence Interval
Large	93.3%	1,037	1.5%
Small	94.8%	917	1.4%

**Note: these pass rates are unweighted**

### 3.6.6 Level of Partial Retailing

There was some evidence of potential partial retailing in 2014 based on the Retail Mystery Shopper survey. 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:

1. 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;
2. 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 eight instances of "1", but none of "2". Each of the instances of "1" were within the 39 "Cheaper routed / dedicated ticket not sold" transactions identified in table 8. These eight instances do not necessarily imply there is a deliberate strategy by a TOC to increase its earnings through partial retailing. As there are more instances of a retailing TOC effectively reducing its earnings by selling the incorrect tickets, and 8 is a relatively low number, it is likely that this arises due to clerical error rather than inappropriate management strategy.

## 3.7 Analysis of Service Issue 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.

### 3.7.1 Ticket office closures

As noted, under 6.1, there were only seven cases of ticket office closure in the survey this year (0.35%), similar to the rate of 0.4% last year.

All of the closures were at smaller ticket offices (less than 195,000 issues per annum). Given the lower level of staffing at the smaller ticket offices, it is more likely that these ticket offices will be closed on any given day and this pattern was also observed in past years.

Of the seven cases of ticket office closure, the mystery shopper readily received information on the reason for closure in four cases.

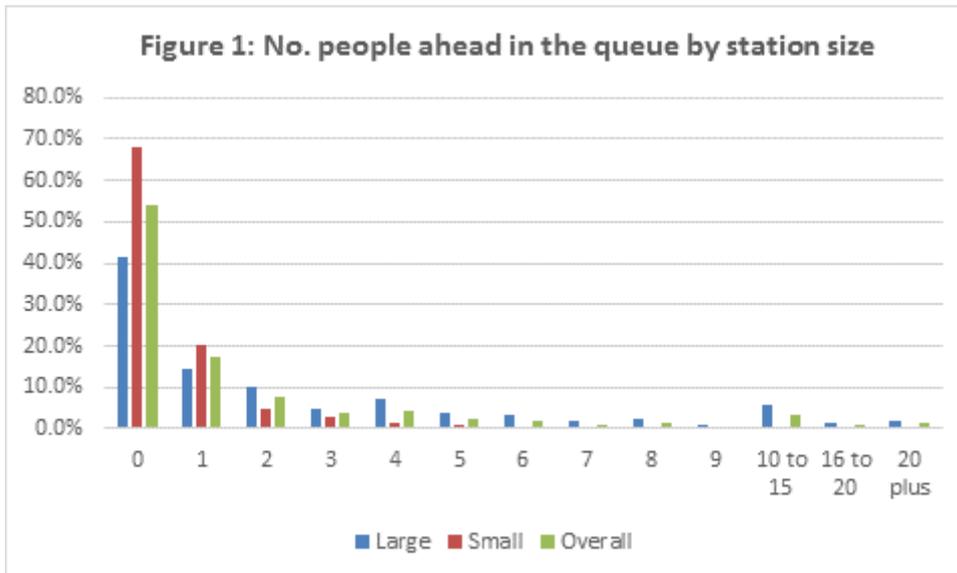
### 3.7.2 Queuing Data

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 2, the same figure as last year (see Table 10). The average of 2, though, hides a significant amount of variation as shown in Figure 1 below.

Around 70% of the shoppers in the 2014 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 2.



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 10).

**Table 10: Number of people in queue by ticket office size and year of survey**

Ticket Office size	2014	2013	2012
Large	3.2	3.2	4.0
Small	0.7	0.8	1.0
<b>Total</b>	<b>2.0</b>	<b>2.0</b>	<b>2.7</b>

A similar pattern is observed in the average number of minutes waiting to be served. The average is 1.8 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 11.

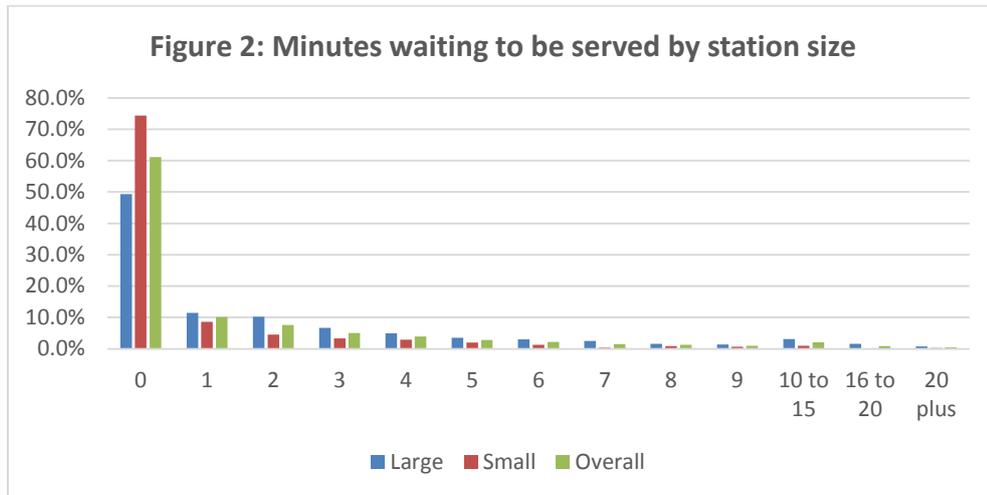


Table 11 also shows that as with queue length there has been no significant change in the average minutes waiting to be served between 2014 and 2013.

**Table 11: Average number minutes waiting by ticket office size and year of survey**

Ticket Office size	2014	2013	2012
Large	2.5	2.4	2.7
Small	1.0	1.0	1.3
<b>Total</b>	<b>1.8</b>	<b>1.7</b>	<b>2.2</b>

### 3.7.3 Clerk’s questions and actions – outward journey

The Mystery Shopper surveys for 2014 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 12 shows that in only around half of cases does the clerk attempt to confirm where the passenger wants to travel and in around 70% of cases when they want to travel. However, these proportions drop considerably for options which might involve the passenger getting a cheaper ticket using some alternative route, especially for slower trains and for journeys which 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 are some large differences here between Large and Small ticket offices and several of these are statistically significant.

**Table 12: Proportion asking by question for outward journey by ticket office size**

Clerk asked:	Large	Small	Total
Exactly where going	47.9%	53.5%	50.1%
When departing	69.7%	75.4%	72.0%
Can you travel earlier/later	24.2%	28.0%	25.7%
Can you take a slower service	5.4%	5.7%	5.5%
Would you mind changing trains	6.0%	9.4%	7.3%
Which route are you taking	11.1%	15.9%	13.0%

**Note: All questions are adjusted by relevant scenario but the results relate to all transactions within relevant scenarios**

Comparing these numbers with 2013 figures (Table 13) shows that clerks appear to be better in 2014 at asking when the passenger is travelling but only similar at confirming where they are going. Generally, there were statistically significant improvements over last year in some of the other questions, although the percentages are still small in absolute terms.

**Table 13: Proportion asking by question for outward journey**

Clerk asked:	2014	2013	Statistical significance
Exactly where going	50.1%	50.6%	No
When departing	72.0%	60.8%	Yes
Can you travel earlier/later	25.7%	22.0%	Yes
Can you take a slower service	5.5%	8.1%	Yes
Would you mind changing trains	7.3%	8.7%	No
Which route are you taking	13.0%	11.4%	No

**Note: All questions are adjusted by relevant scenario but the results relate to all transactions within relevant scenarios**

### 3.7.4 Clerk's questions and actions – return journey

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 14 below shows that in around 63% of cases, the clerk is trying to ascertain when the passenger is coming back. However, this proportion drops to 43% for time of day returning and for confirming the restrictions on the return journey. In terms of differences between large and small stations, both when coming back and the time of day returning are statistically significant with large ticket offices being superior in both cases.

**Table 14: Proportion asking on return journey questions**

Clerk asked:	Large	Small	Total
When coming back	64.8%	61.3%	63.2%
Time of day returning	44.9%	40.5%	43.0%
Restrictions on return journey made clear	42.4%	43.6%	42.9%

**Note: All questions are adjusted by relevant scenario but the results relate to all transactions within relevant scenarios**

When compared with 2013, Table 15 below shows that in asking about time of day returning that clerks in 2014 have deteriorated slightly. Otherwise, the scores are similar to last year.

**Table 15: Proportion asking on return journey questions vs. 2013**

Clerk asked:	2014	2013	Statistical significance
When coming back	63.2%	65.3%	No
Time of day returning	43.0%	45.8%	Yes
Restrictions on return journey made clear	42.9%	40.6%	No

**Note: All questions are adjusted by relevant scenario but the results relate to all transactions within relevant scenarios**

### 3.7.5 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 16 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. There is no statistically significant difference between large and small ticket offices for any of these questions.

**Table 16: Proportion asking on cheaper tickets questions**

Clerk asked:	Large	Small	Total
Cheaper ticket – departing later	14.8%	13.9%	14.5%
Cheaper ticket – slower route	4.0%	3.2%	3.7%
Cheaper ticket – changing trains	2.9%	3.6%	3.2%
Cheaper ticket – off-peak return	44.4%	46.0%	45.0%

Despite the individual proportions being relatively low, however, there is ample evidence to suggest that these scores are significantly worse than they were in 2013 (Table 17), apart from asking whether an off-peak ticket would be appropriate. The deterioration in clerks asking these questions will at least partly explain the rise in not selling a cheaper routed/dedicated ticket which was observed in Section 6.3.

**Table 17: Proportion asking on cheaper tickets questions vs. 2013**

Clerk asked:	2014	2013	Statistical significance
Cheaper ticket – departing later	14.5%	16.9%	Yes
Cheaper ticket – slower route	3.7%	6.8%	Yes
Cheaper ticket – changing trains	3.2%	6.1%	Yes
Cheaper ticket – off-peak return	45.0%	43.7%	No

### 3.7.6 Clerk’s question and actions – other

This sub-section deals with other various questions and actions over ticket purchase (see Tables 18 and 19). The 17.2% scored here is lower than 2013 and this difference is 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 2.6% and this is lower than last year’s score.

On the subject of arrangements for disabled travellers (Disabled Railcard scenario), only in 19.2% of occasions did the clerk ask whether the availability of a disabled toilet was essential (Table 19) and this was lower (but not significantly lower) than last year’s figure. Similarly, despite offering to make journey arrangements around 7% of the time, the clerk actually made the arrangements in just over 2% of transactions for this scenario. Despite a lower sample size for the three Disabled Railcard questions (as it’s only dealing with one scenario), the decline over last year in offering to make disabled journey arrangements is still statistically significant.

**Table 18: Proportion asking on other questions**

<b>Clerk asked:</b>	<b>Large</b>	<b>Small</b>	<b>Total</b>
Asked if had railcard	17.8%	16.5%	17.2%
Suggested buying railcard to reduce journey cost	2.6%	2.7%	2.6%
Availability of disabled toilet	17.7%	20.6%	19.2%
Offered to make disabled journey arrangements	4.8%	8.8%	6.9%
Actually made disabled journey arrangements	3.2%	1.5%	2.3%

**Table 19: Proportion asking on other questions vs. 2013**

<b>Clerk asked:</b>	<b>2014</b>	<b>2013</b>	<b>Statistical significance</b>
Asked if had railcard	17.2%	19.9%	Yes
Suggested buying railcard to reduce journey cost	2.6%	4.0%	Yes
Availability of disabled toilet	19.2%	22.5%	No
Offered to make disabled journey arrangements	6.9%	11.7%	Yes
Actually made disabled journey arrangements	2.3%	1.7%	No

### 3.7.7 Conditions of carriage

As in the previous two years, a designated 10% of the shops involved the shopper also requesting to see the national conditions of carriage. Table 20 below shows that over 95% of transactions where the conditions were requested, they were provided. The difference between large and small ticket offices here is statistically significant.

**Table 20: Proportion where clerk gave positive response on Conditions of Carriage**

	<b>Large</b>	<b>Small</b>	<b>Total</b>
Proportion	98.4%	91.7%	95.5%

Table 21 below shows that the advice given by clerks is now concentrated on advising the customer to consult the National Rail website ([www.nationalrail.co.uk](http://www.nationalrail.co.uk)). Compared with past years, there are now only a few cases where a hard copy was provided permanently or temporarily. The increase from last year to 95.5% is a significant improvement.

**Table 21: Range of positive response on Conditions of Carriage**

<b>Positive response to question</b>	<b>2014</b>	<b>2013</b>
Advised to visit website	84.5%	57.5%
Given hard copy	5.5%	19.9%
Other	1.8%	0.0%
Hard copy to look at but had to give back	3.6%	7.2%
<b>Total</b>	<b>95.5%</b>	<b>84.5%</b>

## 4. National TVM Mystery Shopping survey results

### 4.1 Introduction

An annual research programme designed to measure the accuracy of ticket retailing, has been carried out by ATOC since 1998. Initially the exercise focused solely on tickets sold at station ticket offices, but telesales and online research were introduced from 2002 and, reflecting changing patterns in purchase behavior, the telesales channel was replaced by ticket vending machine (TVM) purchases in 2012.

The 2014 survey, involving a mix of mystery shopping and customer satisfaction research, was conducted by ESA Market Research.

This report focuses on the outcomes of the TVM Mystery Shopping exercise.

### 4.2 Objectives

The key objective of the overall mystery shopping programme is to evaluate the accuracy of rail sector retailing; however, in the case of TVM (as well as online) sales, there is no personal involvement on the part of the retailer, hence the exercise sought to determine the ability of the mystery shopper, as a representative of the ticket buying public, to correctly navigate the TVM in order to purchase the correct and best value ticket for their particular travel scenario.

### 4.3 Methodology

As with the other forms of mystery shopping, the TVM ticket purchases were conducted by mystery shoppers who are representative of the general ticket buying population and who therefore have no more knowledge of the railway or its fares than the average member of the public.

In order to ensure that the mystery shoppers did not build up an atypical degree of familiarity with TVM navigation, each shopper was able to complete no more than two TVM ticket purchases.

Mystery shoppers were asked to record whether they felt confident that they had purchased the correct ticket for their given scenario. In addition to this self-evaluation however, the tickets were also 'marked' by ESA staff, fully trained in the use of the rail fares database, therefore providing a more accurate assessment as to whether the most appropriate ticket had been purchased for that specific journey and travel scenario.

The TVM mystery shopping fieldwork took place between 7<sup>th</sup> July and 16<sup>th</sup> October 2014. Transactions were spread evenly across the day, from 6am though to 11pm.

The full questionnaire used in the survey is included as an appendix.

Unless otherwise stated, charts included in the report are based on the total sample.

### 4.4 Sample

The sample, which included a total of 200 TVM transactions, was designed by Transport Strategies Limited (TSL) on the same principles as the other forms of mystery shopping, with the objective of providing a sample of TVM purchase scenarios that was representative of current actual TVM ticket purchase behavior.

#### 4.4.1 TVM Types

The stations at which the TVM transactions were conducted were selected so as to be representative of TVM sales nationally, thereby providing a representative sample of the two main TVM types (manufacturers): ATOS and Scheidt & Bachman (S&B).

<b>TVM Type</b>	<b>Sample Size</b>
ATOS	100
Scheidt & Bachman (S&B)	100
<b>Total Sample</b>	<b>200</b>

### 3.3.6 Scenarios

The scenarios were set to reflect current national TVM purchasing characteristics and as such, all journeys were for immediate travel. In the majority of cases, the scenario required the shopper to seek the cheapest option, although in some cases in which the journey had competing operators, the most flexible ticket was to be sought. The majority of returns were same day, except where the journey would reasonably be a period return, e.g. airports. Again reflecting TVM sales patterns, a number of Railcard scenarios and First Class journeys were included.

The result was a scenario breakdown as follows:

No.	Scenario Description	Sample Size
1	Fastest	5
2	Cheapest	189
3	Most Flexible	6
<b>Total</b>		<b>200</b>

The split by ticket type was as follows:

Ticket Type	Sample Size
First Class Single	3
First Class Return Same Day	2
Return Same Day	172
Return 1 Week Later	7
Single	16
<b>Total</b>	<b>200</b>

The following number of Railcard scenarios was carried out:

Railcard Scenario	Sample Size
Yes	21
No	179
<b>Total</b>	<b>200</b>

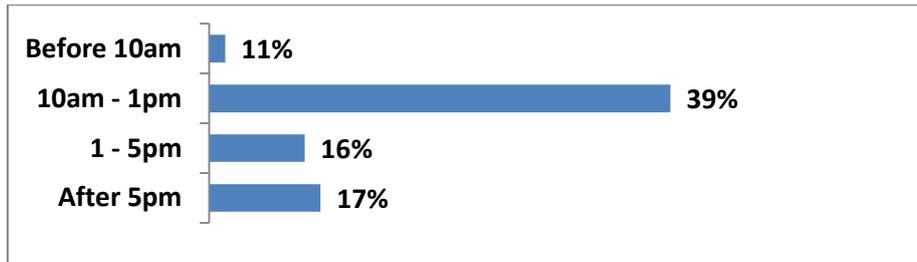
### 4.4.2 Weighting

Weighting was applied to the survey data to ensure the results were representative of actual 2013-14 TVM ticket sale transactions by TOC and TVM type. The following results are based on the weighted survey data.

## 4.5 TVM Transaction Times

### 4.5.1 Did you have to Queue to Use the TVM?

Across the total sample, 21% of mystery shoppers had to queue to use the TVM. Perhaps surprisingly, there was a greater chance of queues being experienced between 10am and 1pm than during peak travelling times (see figure 1)

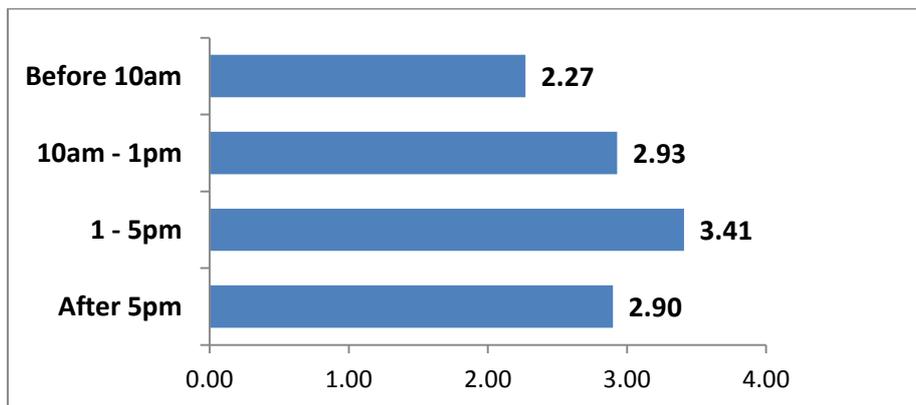


**Figure 1 – Queued to Use TVM by Time of Day**

In cases where mystery shoppers queued to use the TVM, the majority (56%) were required to wait for just one person to use the machine. For those that did have to queue, the average queuing time was approximately 2 minutes 11 seconds.

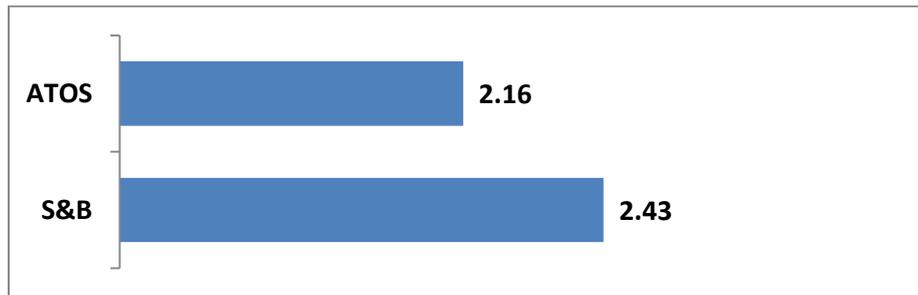
### 4.5.2 How Long in Total did your TVM Ticket Purchase Take?

The average time taken for a TVM ticket purchase (including any time spent queuing) was 2.94 minutes (2 minutes, 56 seconds). 16% of mystery shoppers completed their transaction in less than one minute and a further 34% in 1-2 minutes. 12% of TVM transactions took more than 5 minutes to complete. Those purchasing between the hours of 1pm and 5pm took longest to complete their transaction, followed by those completing transactions between 10am and 1pm, which also had the highest likelihood of queues being present.



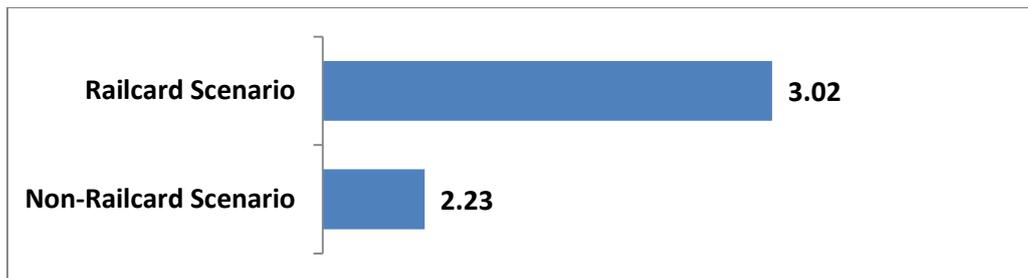
**Figure 2 – Total Ticket Purchase Time (Minutes) by Time of Day**

The average time taken for a TVM ticket purchase (excluding any time spent queuing) was 2.45 minutes (2 minutes, 20 seconds). The average transaction times were slightly shorter for users of the ATOS TVM machines (see figure 3).



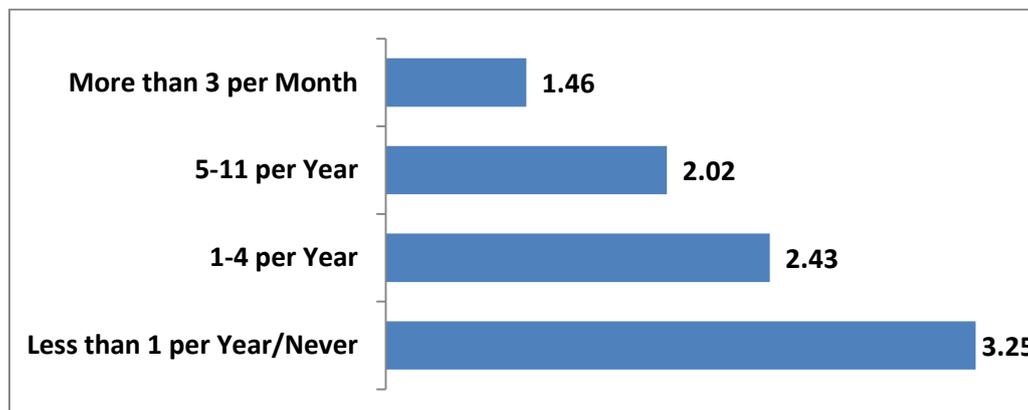
**Figure 3 – TVM Transaction Time (Minutes) by TVM Type**

Although relatively few Railcard scenarios were conducted and hence the finding is not statistically significant, Railcard ticket purchases took longer than non-Railcard transactions.



**Figure 4 – TVM Transaction Time (Minutes) by Railcard Scenario**

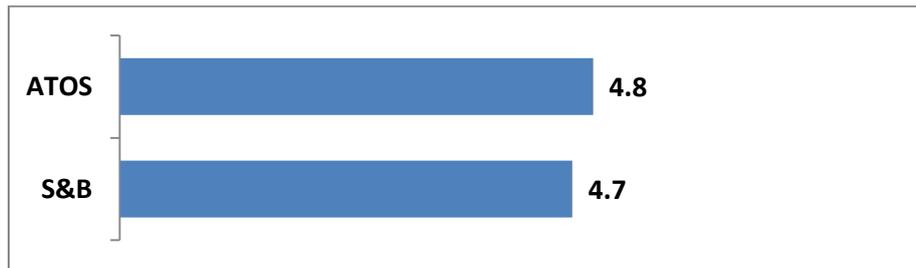
Not surprisingly, there was a correlation between mystery shoppers with most TVM experience and transaction time. Those who purchase tickets from TVM machines more than 3 times per month completed their purchases more quickly than less experienced users.



**Figure 5 – TVM Transaction Time (Minutes) by Frequency of Buying Tickets from TVMs**

#### 4.5.3 How Many Steps were required to Complete Your TVM Ticket Purchase?

The overall mean number of transaction steps required to complete the TVM ticket purchase was 4.8. Results for the two TVM types were not significantly different in this regard.



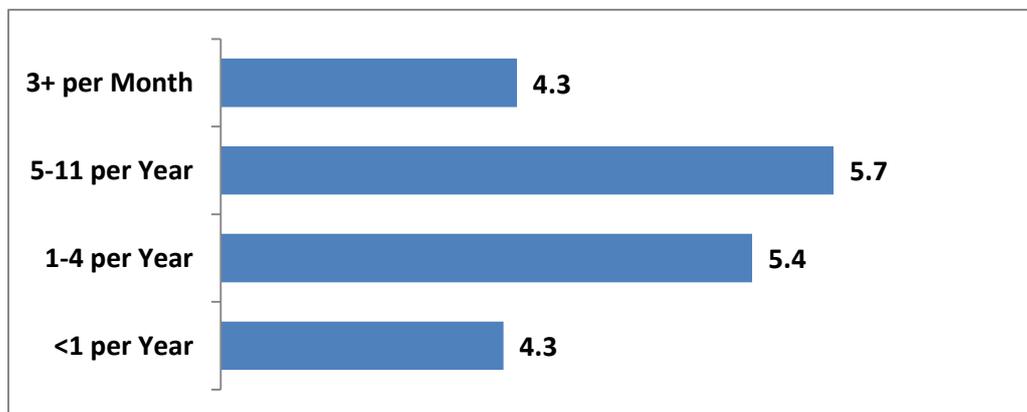
**Figure 6 – No. of Transaction Steps by TVM Type**

There was no significant difference in the number of steps taken for scenarios in which a Railcard purchase was or was not required (see figure 7), although the base size for Railcard visits is low and therefore this result is not statistically sound.



**Figure 7 – No. of Transaction Steps by Railcard Scenario**

There was no clear correlation between TVM experience and the number of steps taken; shoppers with the most TVM experience typically took the same number of steps as those with the least experience using TVM machines.



**Figure 8 – No. of Transaction Steps by Frequency of Buying Tickets from TVMs**

#### 4.5.4. How Many Times Did You Have to Go Back / Correct an Entry?

As expected, the number of times the mystery shoppers had to go back to a previous TVM screen or correct an entry correlated with the patterns seen in respect of the total number of steps required to complete the ticket purchase.

The results for ATOS and S&B machines were similar, although the S&B users typically required slightly less corrections than those using ATOS TVMs.

Railcard scenarios required more corrections than non-railcard journeys, reflecting the findings in respect of both the TVM transaction time and the number of transaction steps.

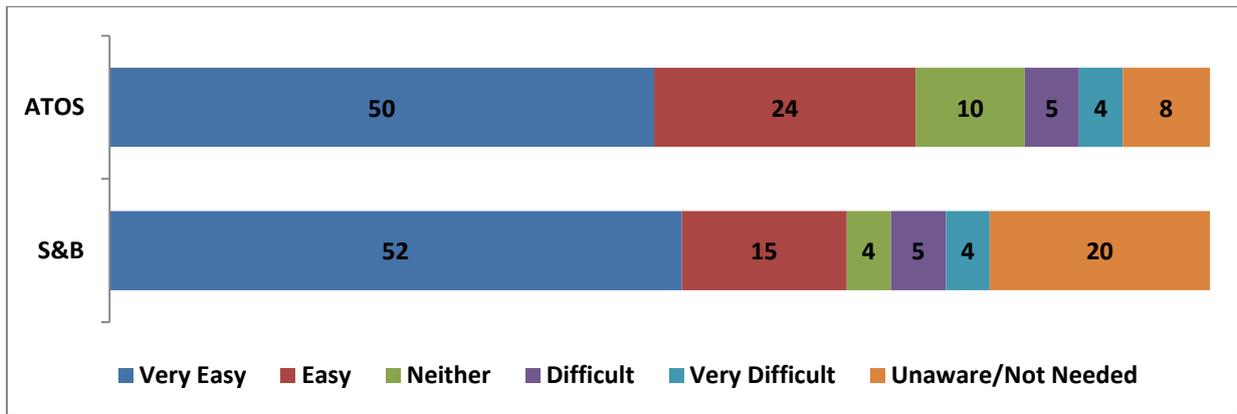
Overall, the average number of times a correction was required was 0.8 per transaction. On this measure, the experience of the user does not appear to have a significant impact on the outcome.

#### 4.6 Satisfaction with TVM Ticket Purchase

##### 4.6.1 How easy was it to find Information about Ticket Types & Conditions?

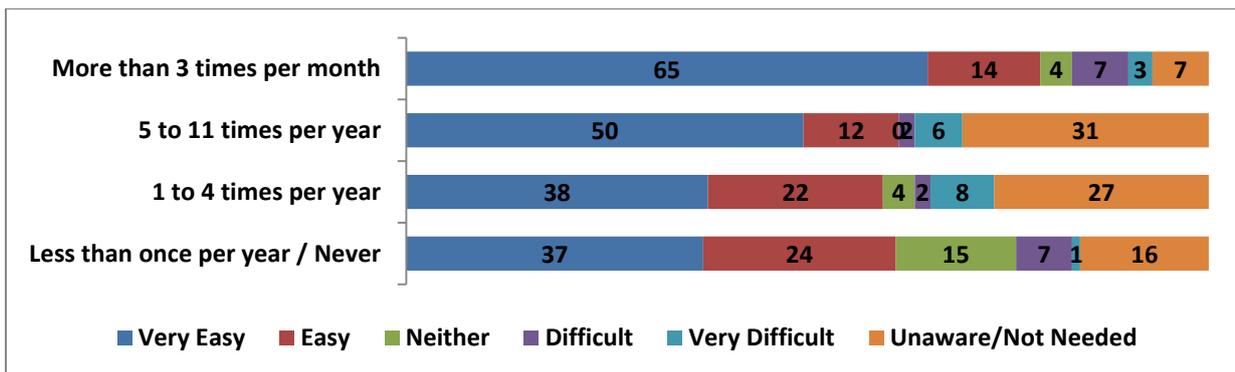
As in 2013, the large majority of mystery shoppers found it easy or very easy to find information about ticket types and conditions on the ticket machine. Only 9% considered it difficult or very difficult to locate the required information this year, compared to 7% in 2013.

There was no significant variation in this result according to TVM type, with both ATOS and S&B machine users reporting similar findings.



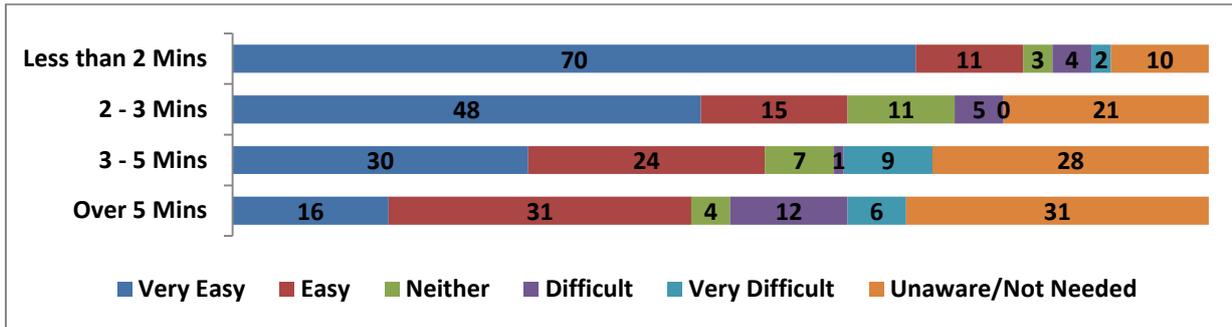
**Figure 9 – Ease of Finding Info. On Ticket Types/Conditions by TVM Type**

As expected, shoppers with the greatest experience in purchasing from TVMs found it easiest to find information on ticket types and conditions. 65% of those who used TVMs more than 3 times per month found it very easy to locate this information, whereas only 38% of those who use TVMs less than 4 times per year found reported that they found it 'Very Easy'.



**Figure 10 – Ease of Finding Info. on Ticket Types/Conditions by TVM Experience**

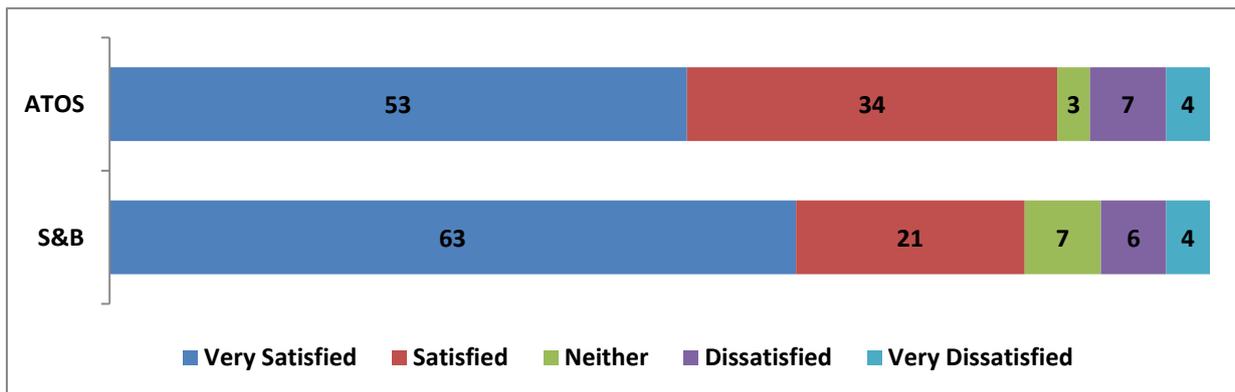
Furthermore, ease of finding ticket information on the TVM correlates with the time taken to complete the ticket purchase; with those completing their purchases more quickly finding it significantly easier to locate the information than those whose transactions took longer.



**Figure 11 – Ease of Finding Info. on Ticket Types/Conditions by Total Purchase Time**

#### 4.6.2 How Satisfied Were You with the Information about Ticket Types & Conditions?

As in 2013, the large majority of TVM mystery shoppers were satisfied with the information available on the machine about ticket types and conditions, with just 10% claiming to be dissatisfied this year (9% in 2013). In the previous year, dissatisfaction levels were slightly higher amongst those using S&B machines; however, in 2014, the two machine types achieved very similar levels of satisfaction.

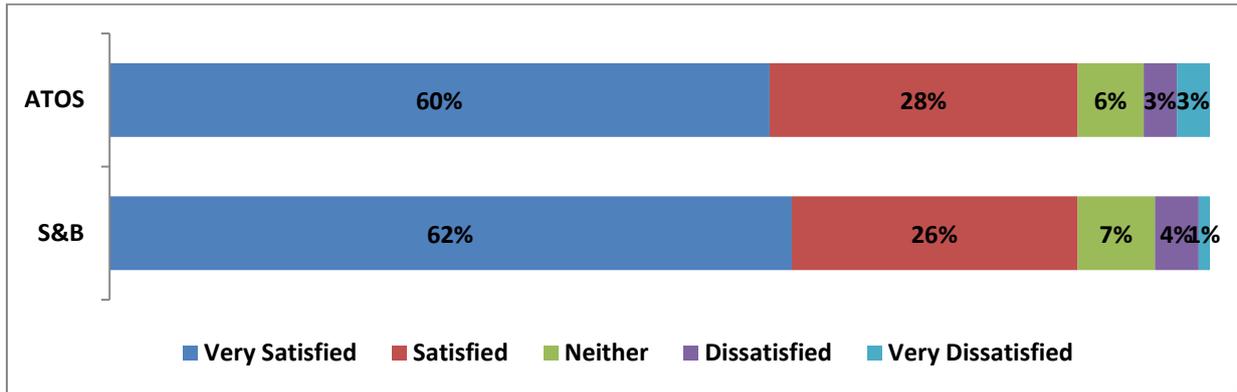


**Figure 12 – Satisfaction with Info. on Ticket Types & Conditions by TVM Type**

#### 4.6.3 How Satisfied were you with the Clarity of Instructions for using the TVM?

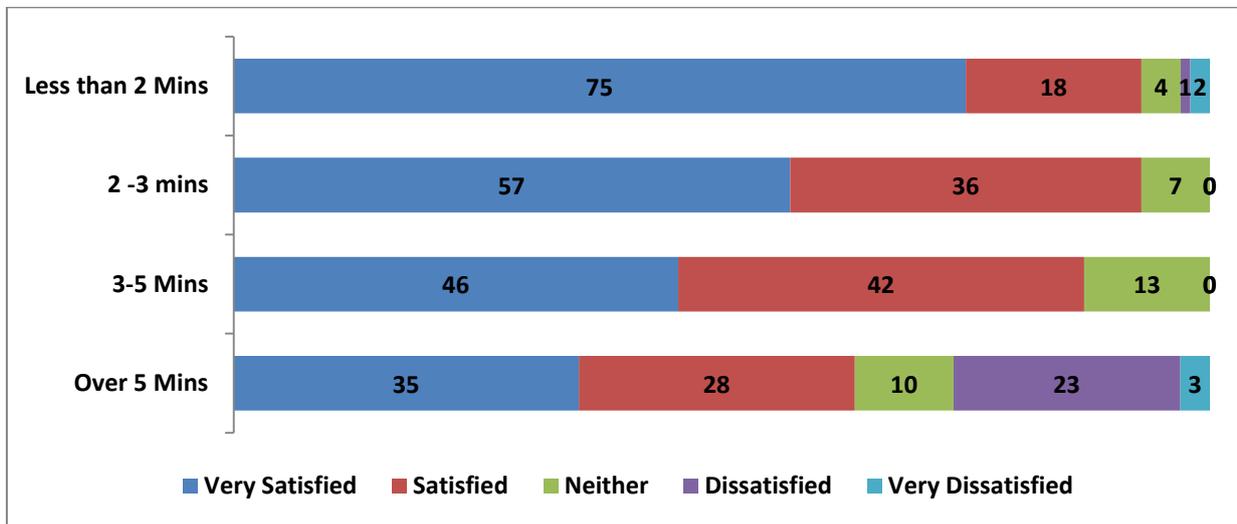
There was very little dissatisfaction with the clarity of instructions for using the ticket machines, with just 5% of mystery shoppers expressing dissatisfaction with this aspect of their TVM purchase experience (4% in 2013).

Satisfaction levels were high amongst users of both machine types.



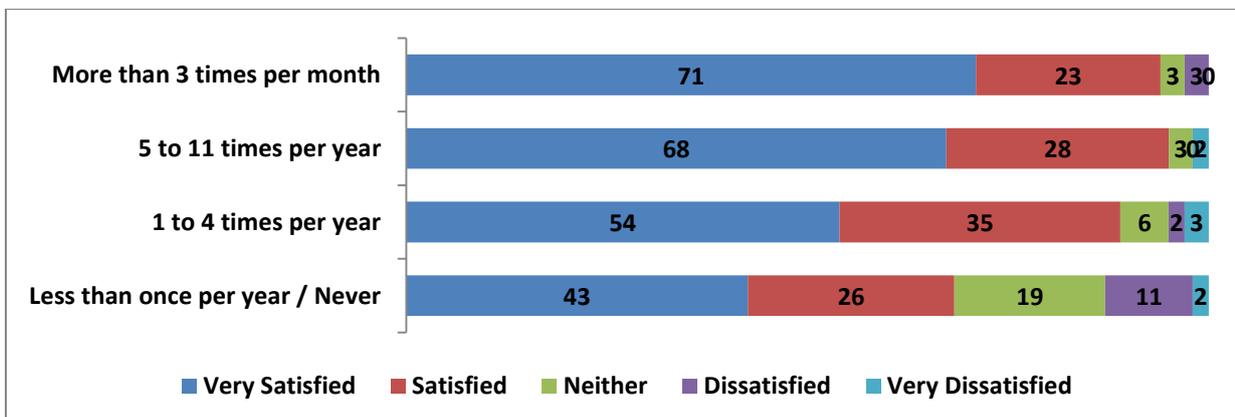
**Figure 13 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by TVM Type**

Unsurprisingly, those whose purchase times were shorter expressed the greater satisfaction with the clarity of instructions.



**Figure 14 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by Total Purchase Time**

Also as expected, shoppers with the most experience of using TVM machines expressed greater satisfaction with the Clarity of Instructions than those with less experience.



**Figure 15 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by TVM Experience**

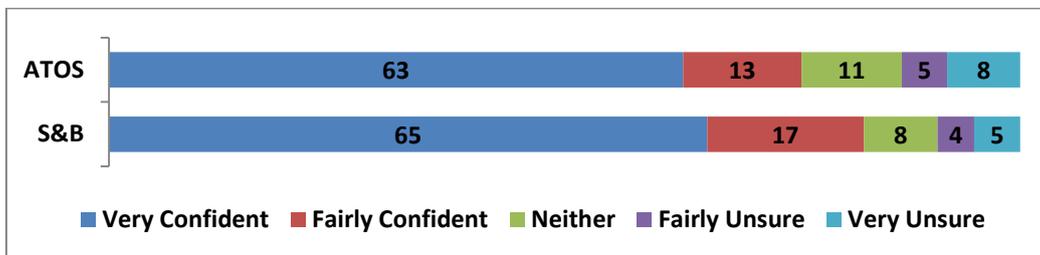
**4.7 The Ticket Purchased**

**4.7.1 Were You Able to Purchase a Ticket?**

Overall, 92% of shoppers were able to successfully complete a ticket purchase.

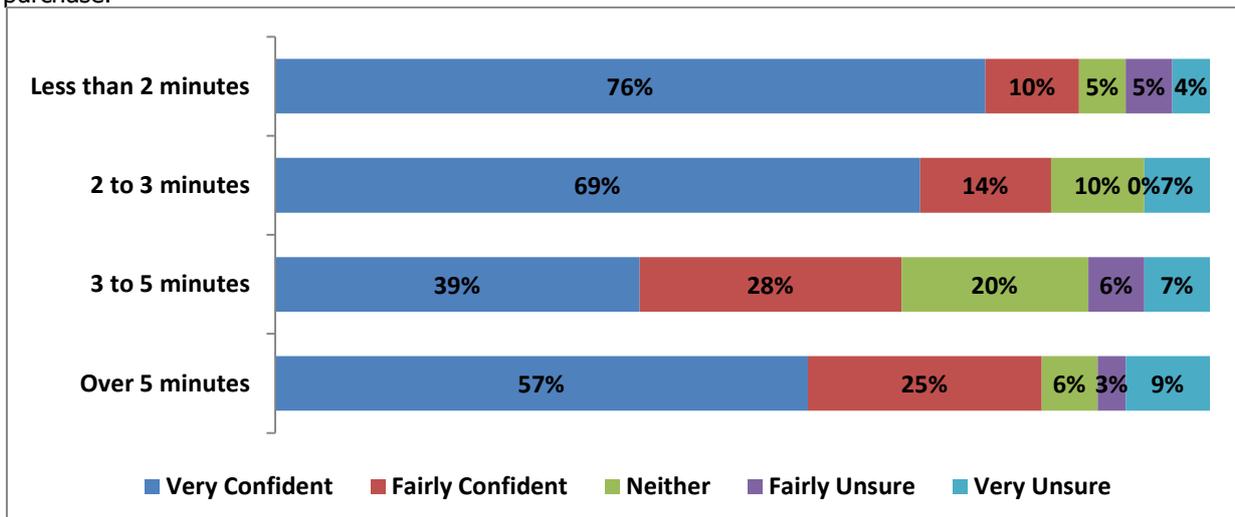
**4.7.2 How Confident Were You That You Got the Correct Ticket?**

As in 2013, only around one in ten mystery shoppers expressed a lack of confidence in having obtained the correct ticket for their journey. The large majority were confident in their purchase, including 65% who were very confident and a further 16% who claimed to be fairly confident that their ticket was correct. There was no significant difference in the confidence levels of the users of the two main types of TVM.



**Figure 16 – Confidence in Getting the Correct Ticket by TVM Type**

As figure 17 illustrates, those taking less time to complete their purchase expressed much greater confidence in the outcome, particularly when looking at shoppers who rated that they were 'very confident' in the purchase.



**Figure 17 – Confidence in Getting the Correct Ticket by Total Purchase Time**

### 4.7.3 Was the Correct Ticket Purchased?

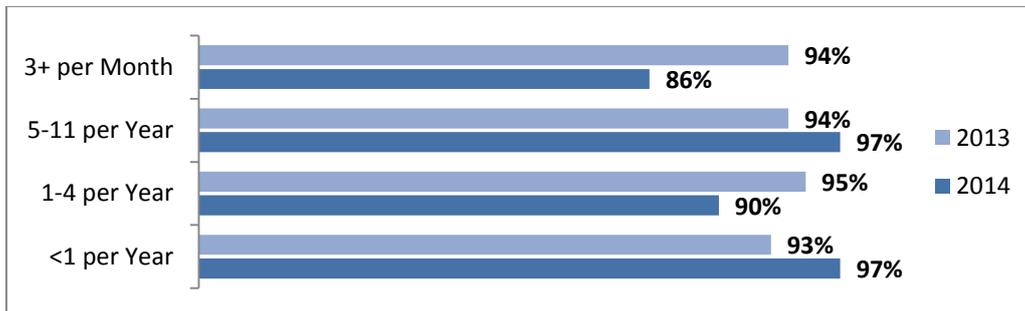
Overall, when marked as correct or not versus the scenario requirements and specific journey details, 91% of all tickets were deemed to be correct.

Those purchasing from S&B machines were somewhat more likely to purchase the correct ticket for their given requirements than those using ATOS machines.



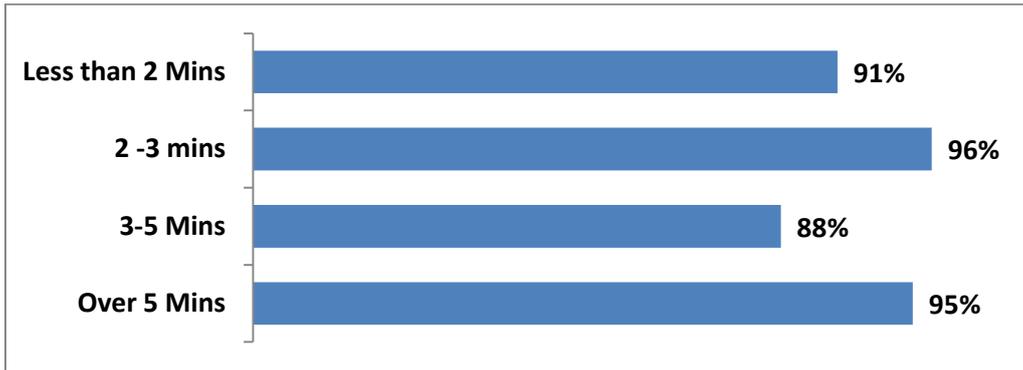
**Figure 18 – Correct Ticket Purchased by TVM Type**

As illustrated below, there is no indication that experience in using TVMs has a significant impact on the likelihood of obtaining the correct ticket.



**Figure 19 – Correct Ticket Purchased by Frequency of Buying Tickets from TVMs**

The 2013 data indicated that there was a correlation between the total time the shopper takes to complete their TVM purchase and their ability to obtain the correct ticket, with those completing their purchase in less than 2 minutes, more likely to achieve a successful outcome than those taking over 5 minutes. However, the 2014 data does not show any significant difference between the duration of the transaction and obtaining a correct ticket (see figure 20).



**Figure 20 – Correct Ticket Purchased by Total Purchase Time**

Although not statistically different there was some indication that those purchasing tickets before 1pm had a lowered chance of obtaining the correct ticket.

## **4.8 Terminology and Suggested Improvements**

### **4.8.1 Was there any Terminology you did not understand?**

Almost all customers found the terminology on-screen to be clear and easy to understand, with only 4% of customers citing terminology that they did not understand.

### **4.8.2 What is the one improvement that could make the TVM more user-friendly?**

The majority (70%) of customers were able to suggest an improvement that they felt would positively impact user-friendliness of the TVM machines.

Many of the subsequent comments customers provided details specific, isolated experiences with the TVM machine which could be improved upon. However, there were some re-occurring themes amongst the suggestions, although there was no significant difference in the types of suggests between ATOS and S&B machine types.

The most common themes included a need to improve the touch sensitivity of the TV screens and the need for more comprehensive information with regards to valid routes, alternative fares and ticket types to be presented in a manner that is easy to see and absorb quickly.

## **5. National Online Mystery Shopping survey results**

### **5.1 Introduction**

An annual research programme, designed to measure the accuracy of ticket retailing, has been carried out by ATOC since 1998. Initially the exercise focused solely on tickets sold at station ticket offices, but telesales and online research was introduced from 2002 and, reflecting changing patterns in purchase behaviour, the telesales channel was replaced by ticket vending machine (TVM) purchases in 2012.

Since 2013 the research, involving a mix of mystery shopping and customer satisfaction surveys, has been conducted by ESA Market Research.

This report focuses on the outcomes of the Online Mystery Shopping exercise.

### **5.2 Objectives**

The key objective of the overall mystery shopping programme is to evaluate the accuracy of rail sector retailing; however, in the case of online (as well as TVM) sales, there is no direct personal involvement on the part of the retailer. For this reason, the exercise sought to determine the ability of the mystery shopper, as a representative of the ticket buying public, to correctly navigate the website in order to purchase the correct and best value ticket for their particular travel scenario.

### **5.3 Methodology**

The mystery shopping elements of the programme were conducted by mystery shoppers who are representative of the general ticket buying population and have no more knowledge of the railway or its fares than the average member of the public.

In order to ensure that the mystery shoppers did not build up an atypical degree of familiarity with the rail ticket websites, each shopper was able to complete no more than two online purchases.

Mystery shoppers were asked to record whether they felt confident that they had been sold the correct ticket for their given scenario. In addition to this self-evaluation however, the tickets were also 'marked' by ESA staff, fully trained in the use of the rail fares database, therefore providing a more accurate assessment as to whether the most appropriate ticket had been sold for that specific journey and travel scenario.

In addition the mystery shoppers were asked to provide feedback on the look and feel of the website, any jargon that they accounted and any improvements that they would suggest.

The online mystery shopping fieldwork took place between 4<sup>th</sup> July and 6<sup>th</sup> November, 2014.

The full questionnaire used in the survey is included as an appendix.

Unless otherwise stated, charts included in the report are based on the total sample of 400.

## 5.4 Sample

The sample, which included a total of 236 online transactions on TOC retailer websites, was designed by Transport Strategies Limited (TSL) with the objective of providing a sample of purchase scenarios that reflects the mix of actual online ticket purchases by the general public.

The sample consisted of the following websites:

Website	Sample Size
crosscountrytrains.co.uk	14
eastcoast.co.uk	37
eastmidlandtrains.co.uk	12
tpexpress.co.uk	8
virgintrains.co.uk	45
<b>Total Long Distance Operators</b>	<b>116</b>
chilternrailways.co.uk	5
firstcapitalconnect.co.uk	10
firstgreatwestern.co.uk	30
greateranglia.co.uk	7
londonmidland.com	14
southeasternrailway.co.uk	6
southwesttrains.co.uk	9
southernrailway.com	19
<b>Total London &amp; South East Operators</b>	<b>100</b>
arrivatrainswales.org	6
northernrail.org	8
scotrail.co.uk	6
<b>Total Regional Operators</b>	<b>20</b>
<b>Total TOCs</b>	<b>236</b>

## 5.5 Sample

The scenarios used for this Online Mystery Shopping survey were as follows:

No.	Scenario Description	Sample Size
1	Cheapest ticket, 2 weeks ahead	27
2	Cheapest ticket, return same day	22
3	Cheapest ticket, single	30
4	Cheapest ticket, return 1 week later	34
5	First Class	31
6	Senior Railcard	35

7	Travelling with children	28
8	16-25 Railcard	29
<b>Total</b>		<b>236</b>

Mystery shoppers were further instructed regarding the means of ticket delivery/collection, as follows:

<b>Ticket Delivery/Collection Method</b>	<b>Sample Size</b>
Collection from TVM	174
Collection from ticket office	8
Delivered by post	88
Download to print at home	4
<b>Total</b>	<b>236</b>

## 5.6 Weighting

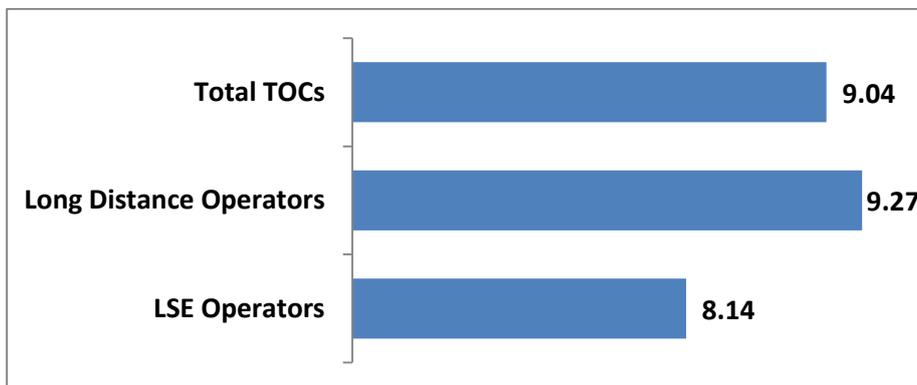
Weighting was applied to the survey data to ensure the results were representative of actual 2013-14 patterns in respect of online ticket sale transactions by website and ticket type (scenario). The following results are based on this weighted survey data.

## 5.5 Length of Transaction

### 5.5.1 How Long in Total Did Your Ticket Purchase Take?

Across the total sample, the average time taken for an online ticket purchase was just under 10 minutes. Just over a third (35%) of mystery shoppers took less than 5 minutes to complete their purchase, whereas 19% took over 15 minutes, the latter figure being comparable with the 2013 result.

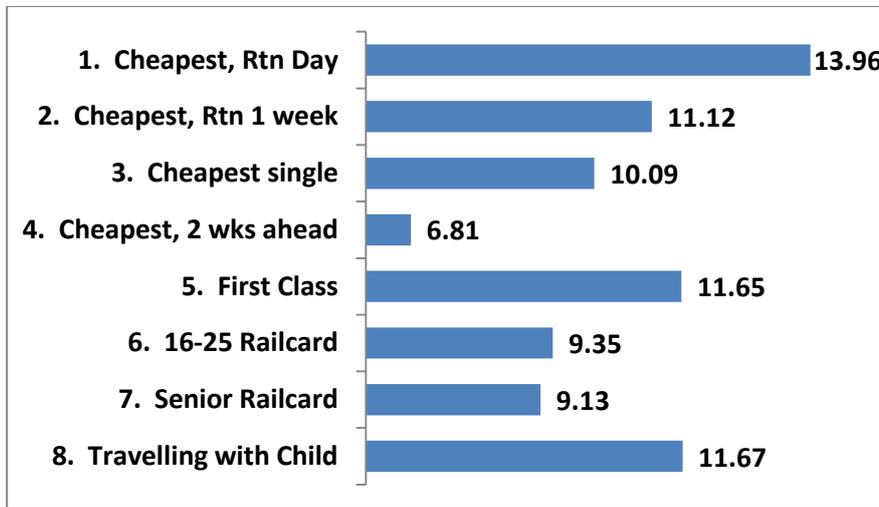
Those purchasing via the websites of London & South East operators had the shortest transactions times (see figure 1), whereas purchases via the sites of Regional operators took the longest.



**Figure 1 – Transaction Time by Retailer Category**

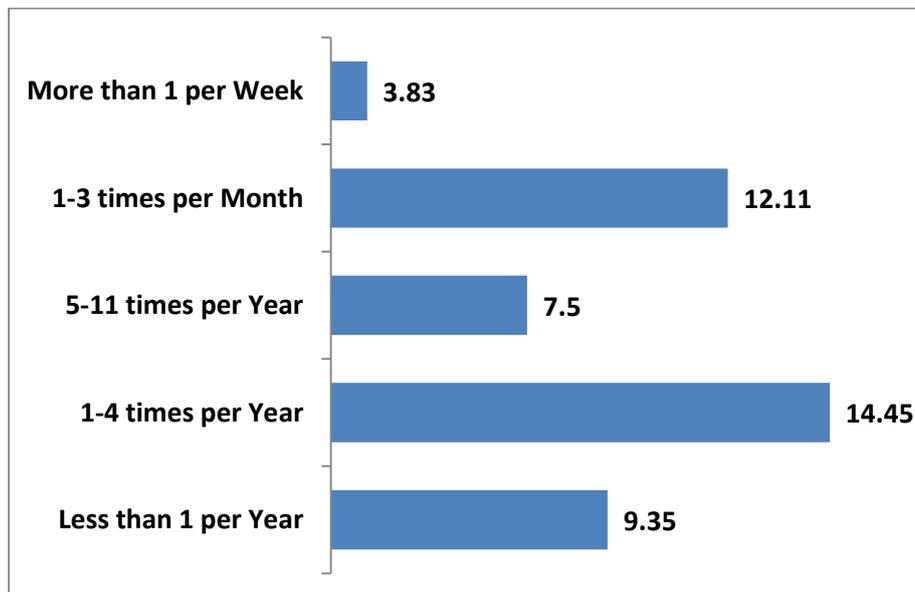
There were some variations by scenario; surprisingly transactions involving the purchase of tickets with a same day return took the longest to complete, with First Class and Senior Tickets having the next longest

transactions. The Cheapest ticket, two weeks in advance and cheapest single ticket purchases scenarios had the shortest transaction times.



**Figure 2 – Transaction Time by Scenario**

When looking at the frequencies of purchasing rail tickets online (see figure 4), although there is no clear correlation between frequency of buying Rail tickets online and transaction times, it is clear that those purchasing more than once a week have the shortest transaction times.



**Figure 4 – Transaction Time by Frequency of Buying Rail Tickets Online**

### 5.5.2 How Many Different Web Pages Did You Access to Complete Your Purchase?

The overall mean number of screen views required in order to complete the ticket purchase was 6.2. Consistent with the transaction time results, those purchasing from London & South East operator websites had to view the fewest web pages.

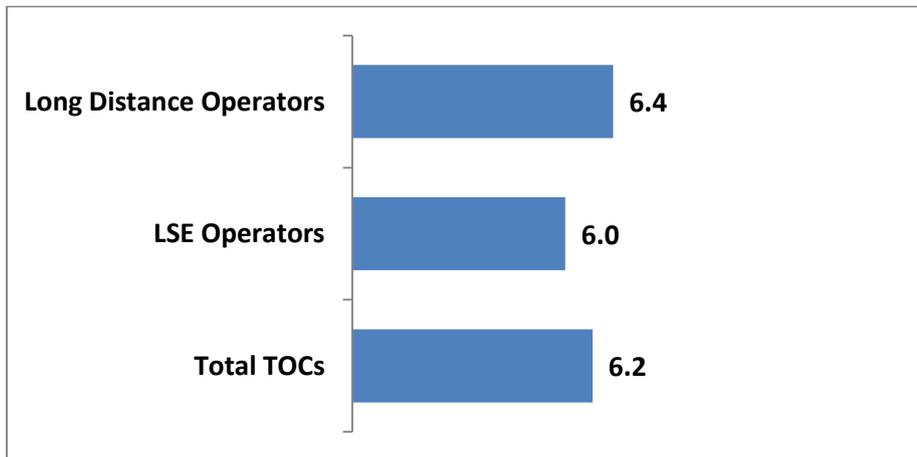


Figure 5 – No. of Page Views by Retailer Category

As illustrated in figure 6, Scenarios 8 (Travelling with Children) and 5 (First Class ticket) appear to be the most complex online transactions, requiring an average of 8 page views, compared with typically 6-7 for all other scenarios.

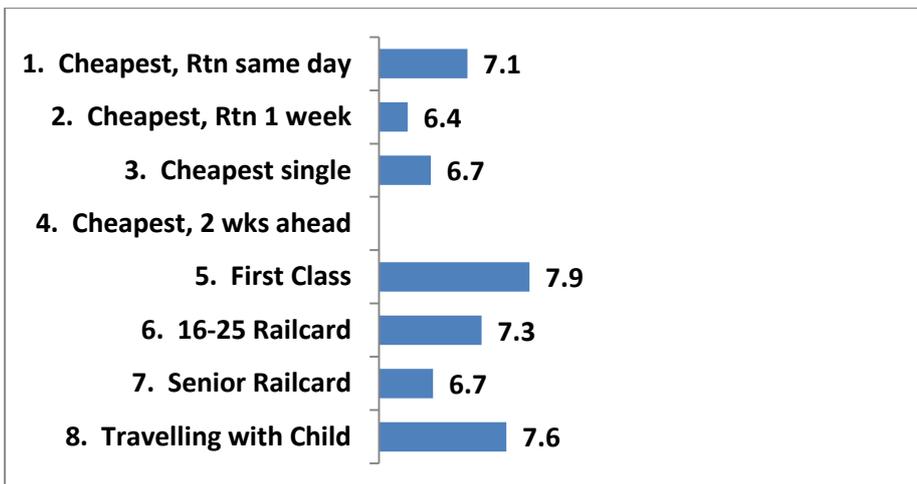
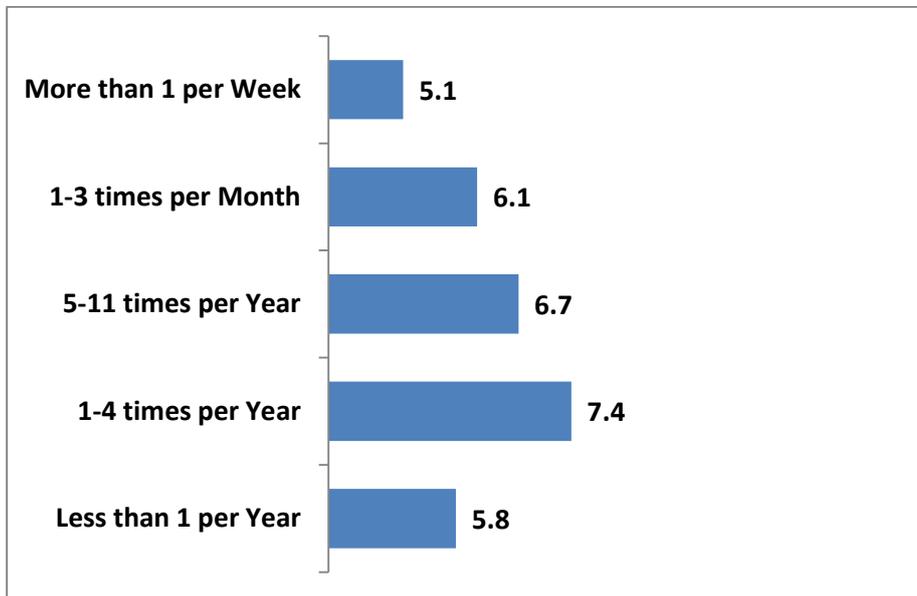


Figure 6 – No. of Page Views by Scenario

There is a correlation between the number of page viewed by shoppers and their experience of purchasing rail tickets online. Mirroring the transaction time data, those with most experience (purchasing rail tickets online more than once a week), were able to purchase in at least 1 less step than the rest of the sample.



**Figure 7 – No. of Page Views by Frequency of Buying Rail Tickets Online**

### 5.5.3 How Many Times Did You Have to Go Back / Correct an Entry?

As expected, shoppers who purchased rail tickets more often had to go back to a previous screen or correct an entry less often than those who purchased tickets less regularly. Shoppers who purchased rail tickets one to three times a month or more regularly had an average of 0.4 “go backs”/ corrections while those who purchased tickets less often had to go back a screen or make a correction once on average.

There was no significant variation between scenario types and the number of “go back” / correction needed this year; shoppers generally navigated the website with ease, with an average of only 0.5 “go backs” / corrections for the total sample, this is an improvement on last year’s average of 0.73.

## 5.6 Satisfaction with Online Ticket Purchase

### 5.6.1 How Easy was it to Find Information about Ticket Types & Conditions

The large majority of mystery shoppers found it easy or very easy to find information about ticket types and conditions. Only 6% of shoppers considered it difficult or very difficult to find information related to ticket types and conditions.

There was no great variation in this result according to retailer type (see figure 8)

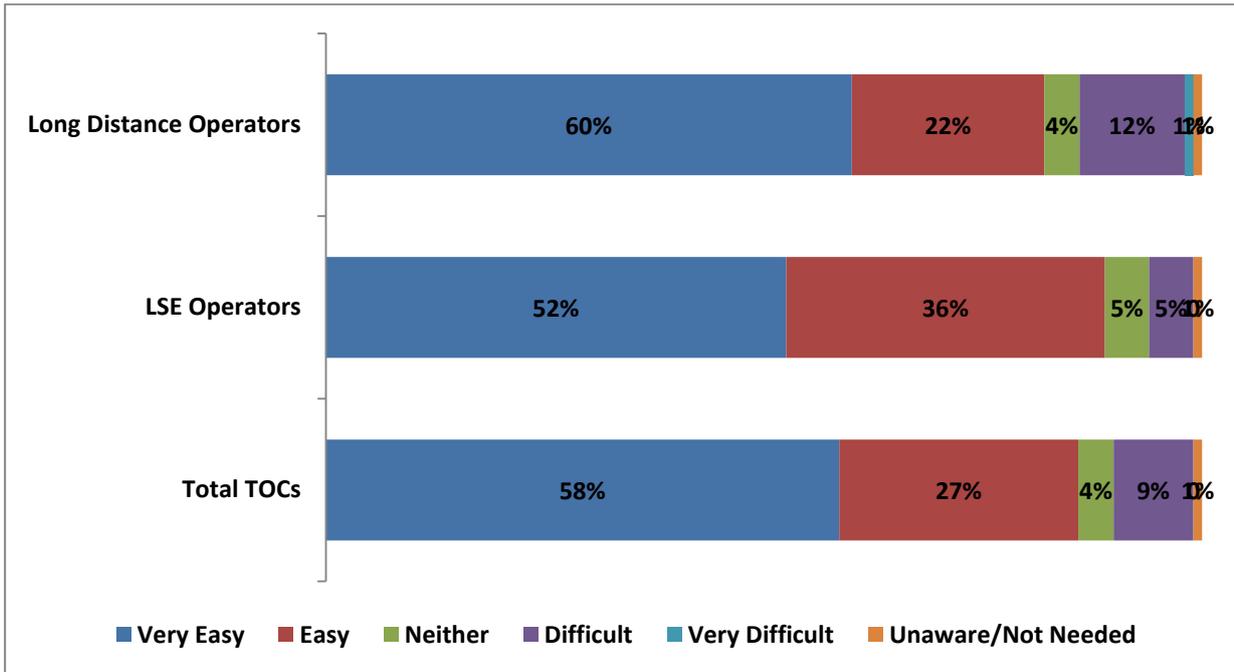


Figure 8 – Ease of Finding Info. On Ticket Types/Conditions by Retailer Category

There appears to be a correlation between ease of finding information on ticket types and conditions and the shoppers’ ability to purchase the correct ticket. 68% of shoppers who managed to purchase the correct ticket for their journey rated the ease of finding information on ticket types as ‘very easy’, whereas only 35%, of shoppers who failed to purchase the correct ticket provided the same rating.

**5.6.2 How Satisfied Were You with the Information about Ticket Types & Conditions?**

The large majority of online shoppers were satisfied with the information available on the website about ticket types and conditions. Only 3% of the sample claimed to be dissatisfied.

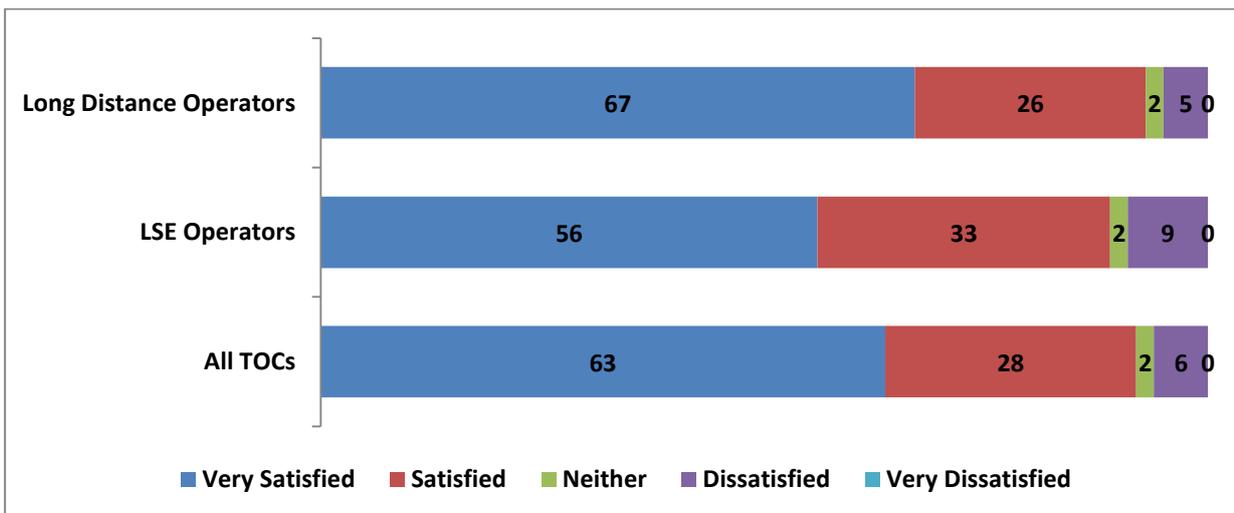


Figure 9 – Satisfaction with Info. on Ticket Types/Conditions by Retailer Category

There is no clear indication that online shopping experience, or specific experience in purchasing rail tickets online, has a bearing on satisfaction with the information available.

Shoppers conducting Scenarios 3, 7 and 8 had significantly higher levels of satisfaction than those conducting other scenarios.

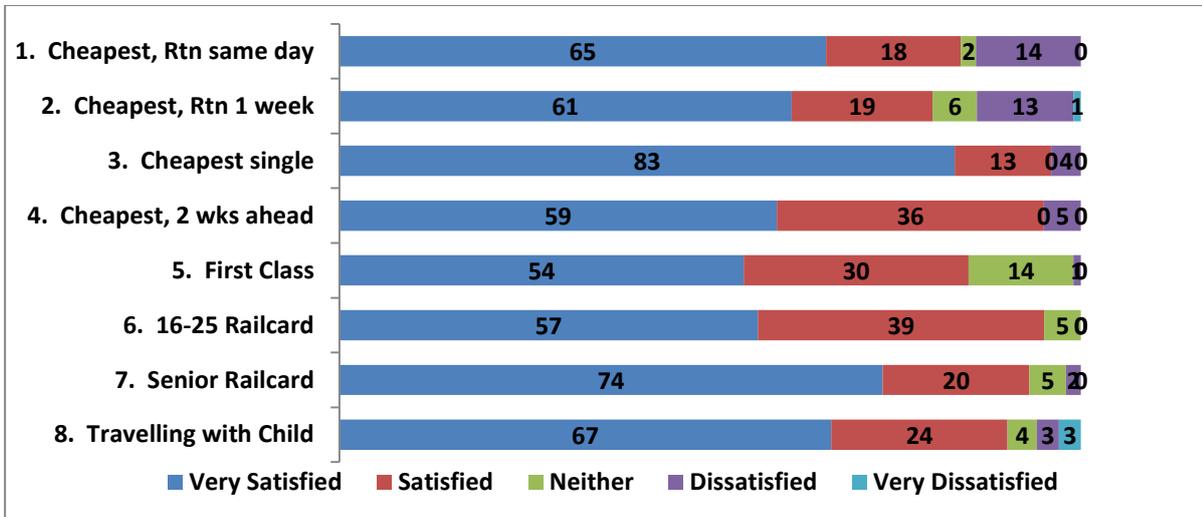


Figure 10 – Satisfaction with Info. On Ticket Types/Conditions by Scenario

### 5.6.3 How Satisfied were you with the Clarity of Instructions for using the Website?

There was very little dissatisfaction with the clarity of instructions for using the website. Overall, just 1% of online shoppers expressed dissatisfaction with this aspect of their online purchase experience.

Long Distance operators were regarded more favourably for providing clearer instructions than the other retailers.

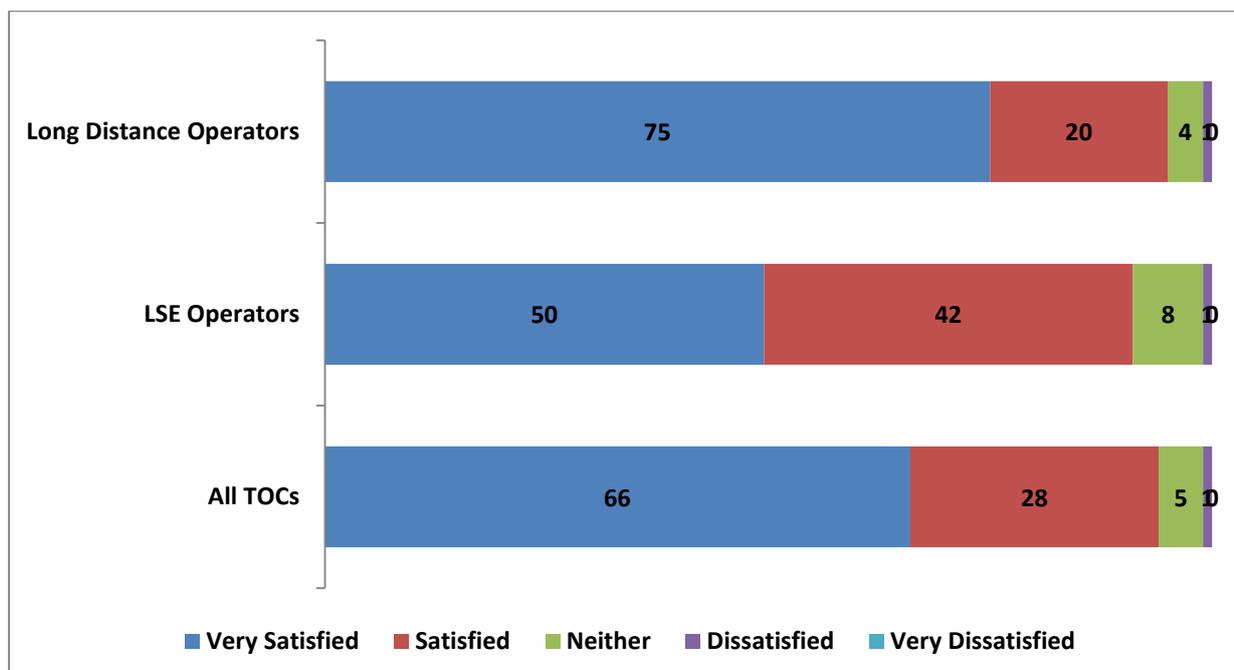


Figure 11 – Satisfaction with Clarity of Instructions by Retailer Category

### 5.7.1 Were You Able to Purchase a Ticket?

All shoppers were able to successfully complete a ticket purchase from TOC retailer websites.

### 5.7.2 How Confident Were You That You Got the Correct Ticket?

Almost 1 in 10 (9%) of mystery shoppers expressed a lack of confidence in having obtained the correct ticket for their journey with 60% being "very confident" and a further 29% feeling "fairly confident" that their ticket was correct.

As in the 2013 round, those buying from Long Distance operator websites were most confident that they had purchased the correct ticket, with 97% claiming to be either "Very Confident" or "Fairly Confident" compared to 74% of London and South East Operator websites.

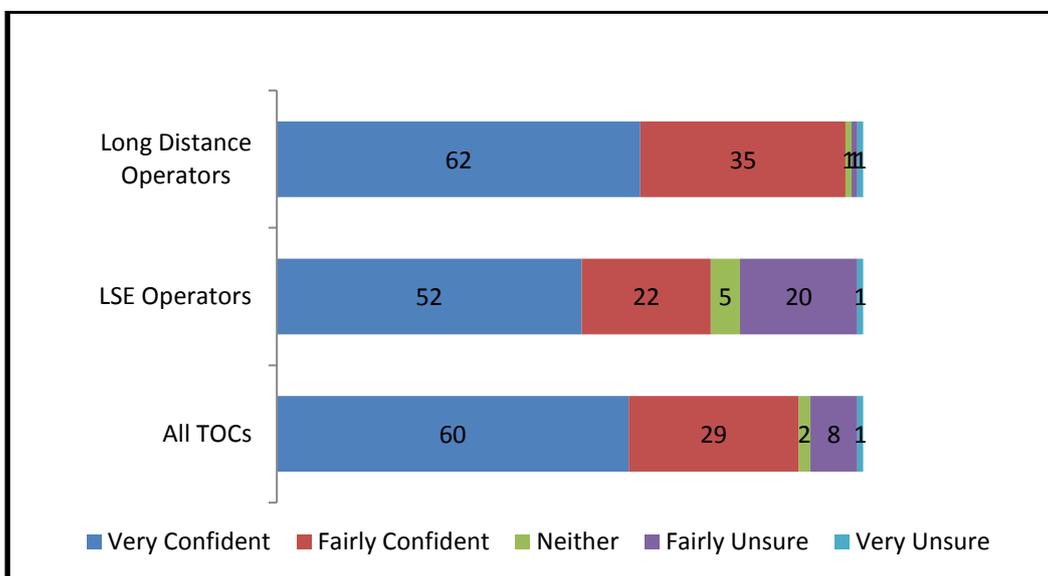
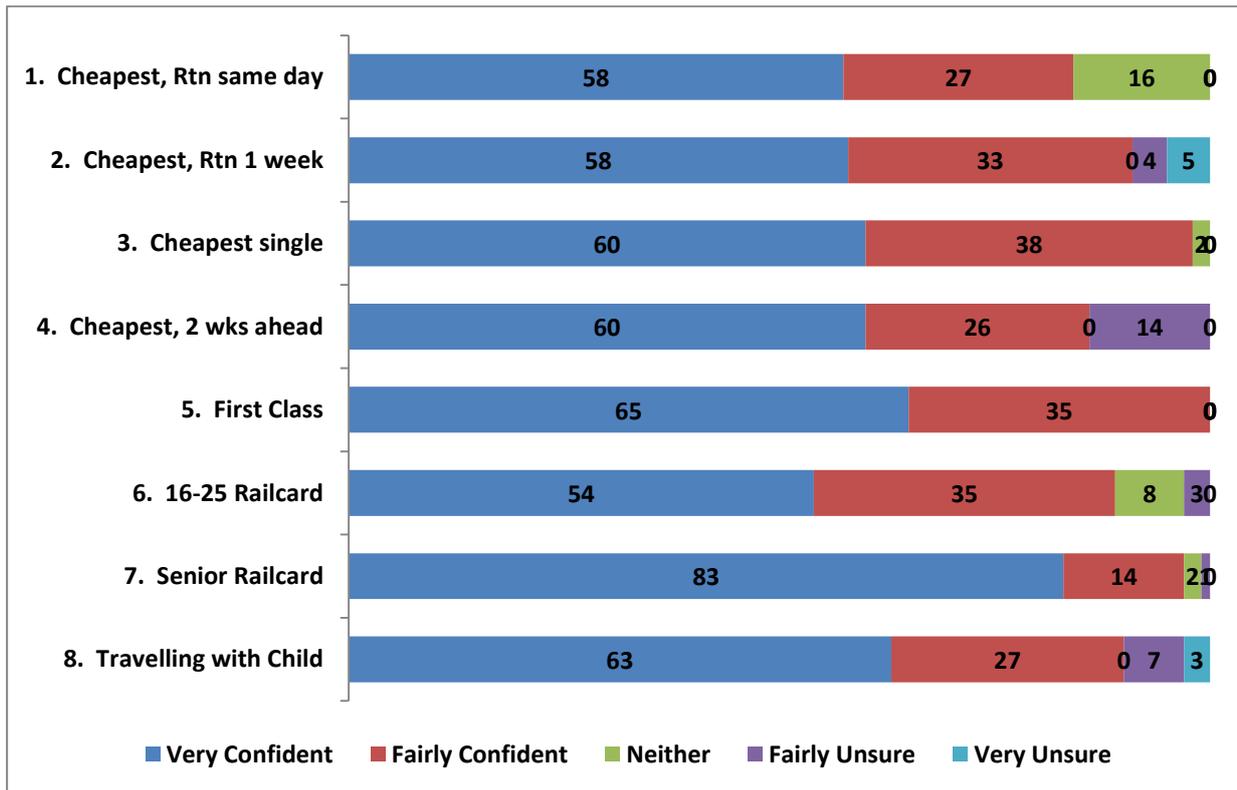


Figure 12 – Confidence in Getting the Correct Ticket by Retailer Category

In 2013, the Travelling with Child scenario caused the most confusion in the mind of the mystery shoppers, however in 2014 the ratings improved and 63% of those conducting the 'Travelling with a Child' scenario In 2014 felt either "Very confident" or "Fairly Confident" that they had obtained the correct ticket. Perhaps surprisingly, those purchasing senior railcards (Scenario 7) and single tickets (Scenario 3) were most to provide a rating of 'Very Confident' than those purchasing other ticket types (See Figure 13).



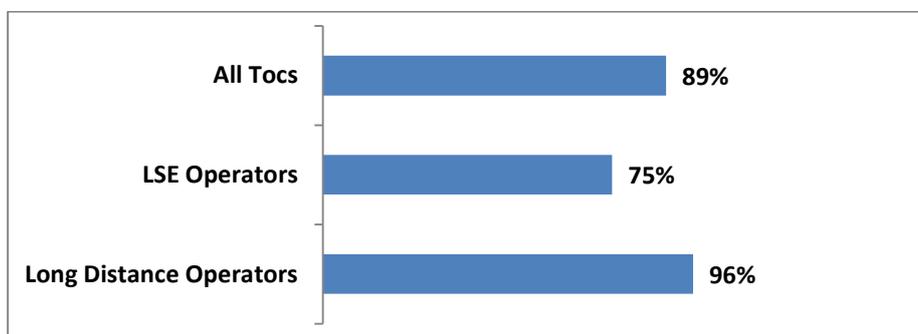
**Figure 13 – Confidence in Getting the Correct Ticket by Scenario**

As is to be expected, the group of shoppers with the least experience in purchasing rail tickets online had the lowest average confidence levels; only 25% of this group were “very confident”, versus 60% for the overall sample.

### 5.7.3 Was the Correct Ticket Purchased?

Overall, when marked as correct or not versus the scenario requirements and specific journey details, 88% of all tickets purchased from TOC retailers were deemed to be correct.

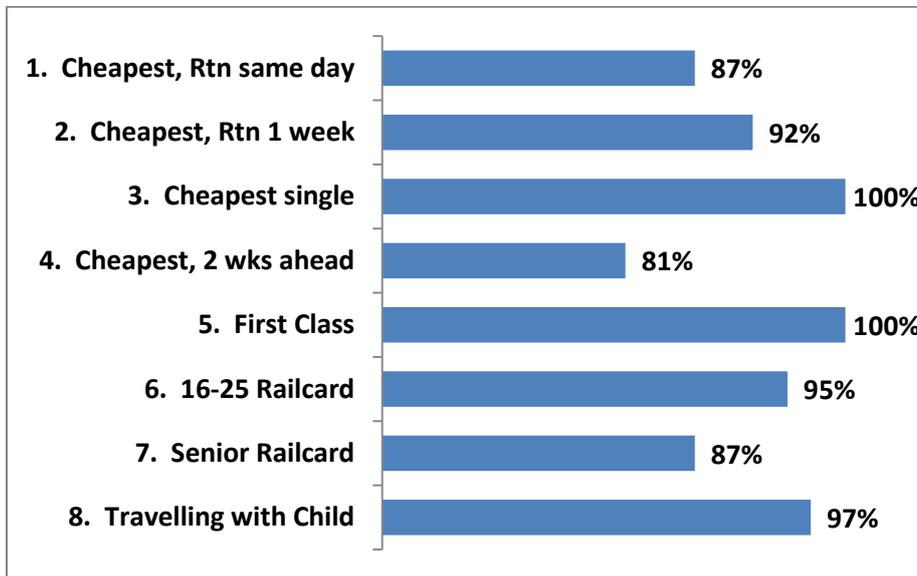
As in the 2013 study, shoppers purchasing from London & South East operator websites were less successful in obtaining the correct ticket, with a success rate of 75% for London & South East users versus 96% for users of Long Distance Operators in 2014.



**Figure 14 – Correct Ticket Purchased by Retailer Category**

Shoppers proved successful obtaining the correct ticket in the majority of scenarios. Perhaps surprisingly, Scenario 8 ‘Travelling with Child’ was not one of the lowest scoring scenarios on this metric.

The scenarios most likely to generate an incorrect ticket were Scenario 1 'Cheapest Ticket, Return Same Day' , Scenario 4 'Cheapest Ticket, 2 weeks ahead' and Scenario 7 'Senior Railcard', although Senior Railcard buyers reported higher confidence levels in assuming they had purchased the correct ticket (See Figure 13).



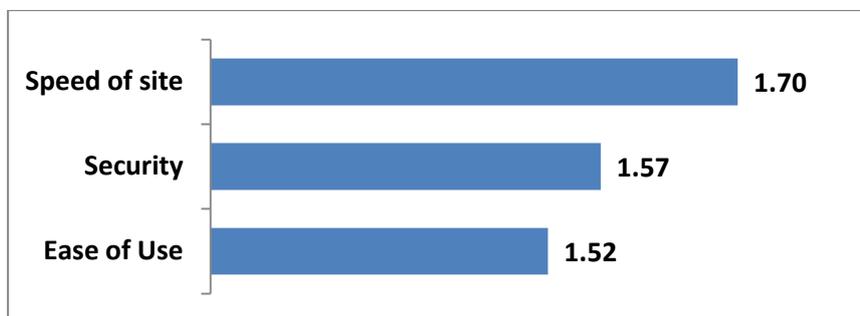
**Figure 15 – Correct Ticket Purchased by Scenario**

Online shopping experience in general was not seen to influence a successful outcome. However, customers who purchased rail tickets less often (less than once per year) were significantly less likely to obtain the correct ticket (60%) compared to the sample as a whole (88%).

## 5.8 Opinions of the Website

### 5.8.1 How Satisfied Were You with the Following Aspects of the Website?

The large majority of mystery shoppers were satisfied with all aspects of the websites used. As in 2013, the highest satisfaction levels were expressed with the Speed and Security of the ticketing websites, whereas users were less satisfied with Ease of Use.

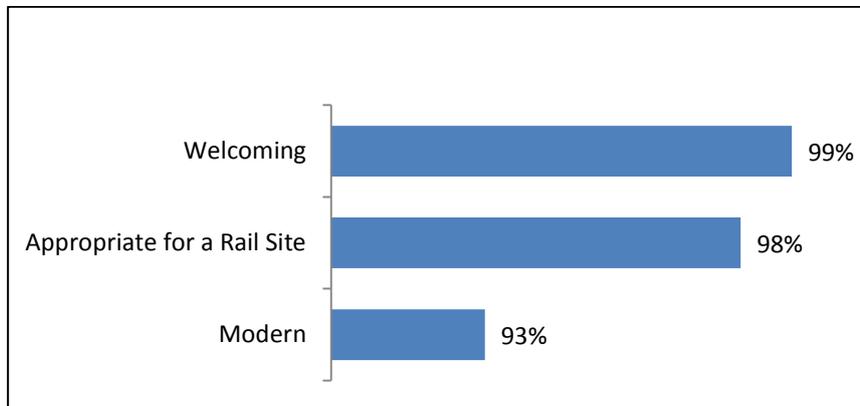


**Figure 16 – Satisfaction with Aspects of the Website (Mean Score) – Total Sample**

Mean score calculation: Very Satisfied +2, Satisfied +1, Neither 0, Dissatisfied -1, Very Dissatisfied -2

55% of London and South East Operator users rated 'Ease of use' highly ("Very Satisfied") compared to 72% of those using London Distance Operators.

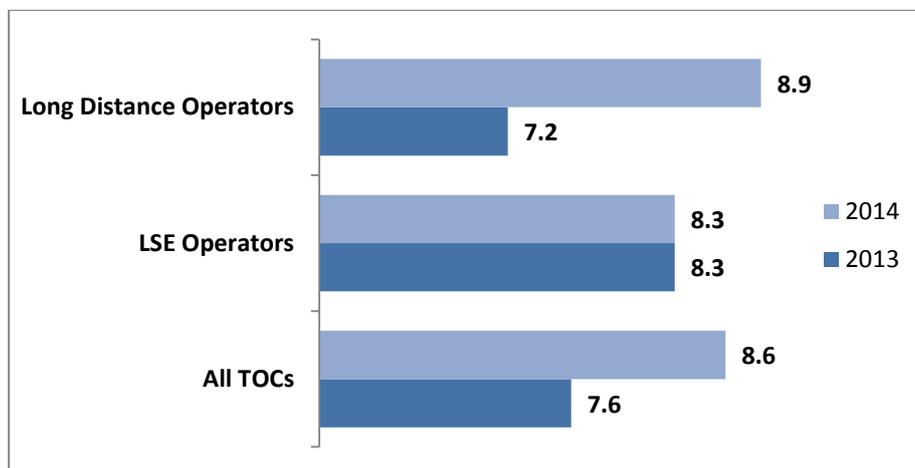
The majority of shoppers were also satisfied with the presentation and layout of the websites with almost all shoppers stating that the websites they used had a welcoming interface, had a modern layout and were also appropriately presented for a Rail site.



**Figure 17 – Satisfaction with Aspects of the Website Appearance – Total Sample**

### 5.8.2 How Likely Would You Be to Recommend this Website to a Friend?

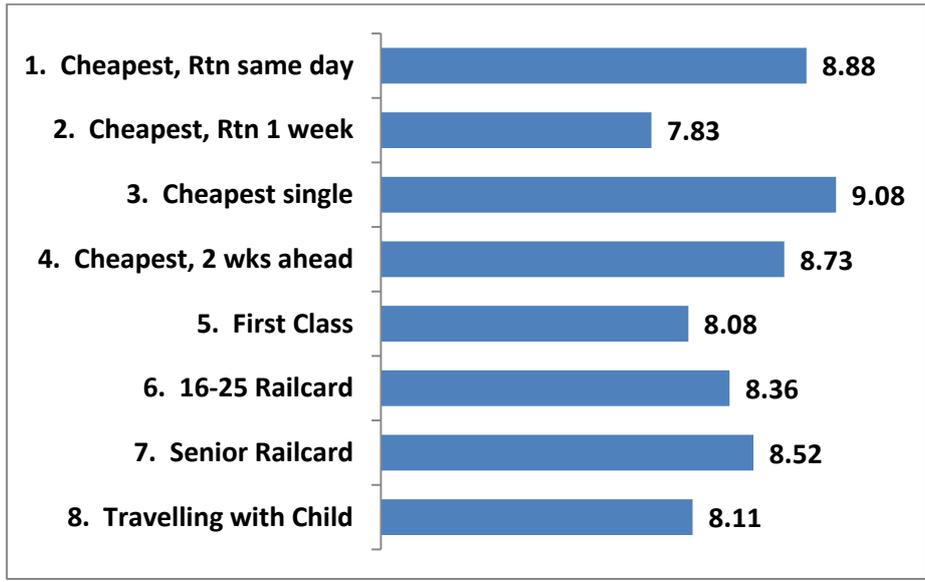
In terms of overall likelihood to recommend the website, Long Distance Operators have received significantly higher scores in the 2014 study, with 67% of shoppers providing a score of either 9 or 10 when asked how likely they would be to recommend the website(s) to a friend, while scores for London and South East Operators remain unchanged from 2013.



**Figure 18 – Likelihood of Recommending Website (Mean Score) – By Retailer Category**

Mean score calculation: 0-10 scale, from Extremely Unlikely (0) to Extremely Likely (10)

Unsurprisingly, those most likely to recommend the rail ticketing websites were those conducting the less complex scenarios, 'Standard Day Return' (Scenario 1) and 'Single tickets (Scenario 3). However, those conducting Scenario 2 'Return in a week's time' attributed the lowest recommendation levels.



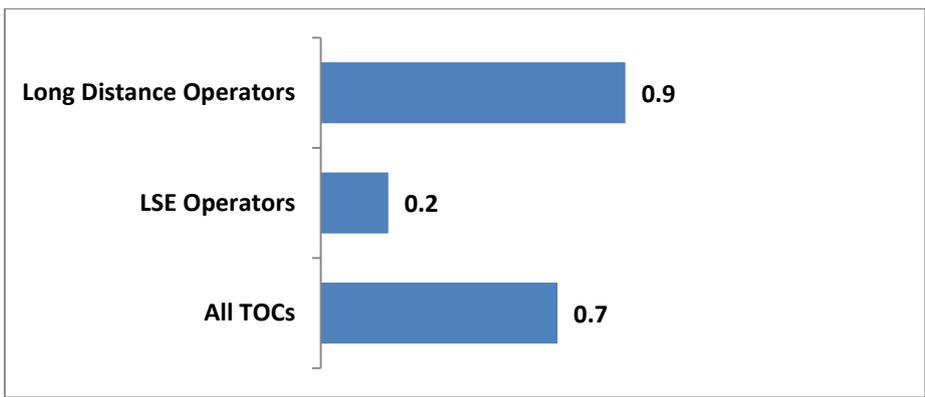
**Figure 19 – Likelihood of Recommending Website (Mean Score) – by Scenario**

Mean score calculation: 0-10 scale, from Extremely Unlikely (0) to Extremely Likely (10)

### 5.8.3 How Does this Website Compare with Others Used for Goods & Services?

When comparing the rail ticketing websites with others they had experience of, the mystery shoppers were generally positive. Almost 50% of shoppers responded positively (saying this site was “the best”, “better than most” or “better than some”), and a further 43% said the website was about the same as others. Only 8% gave a negative answer versus 14% in the previous year (commenting that the site was “worse than some”, “worse than most” or “the worst”).

As in 2013, those using Long Distance operator websites were the most enthusiastic, giving significantly more positive feedback than those using London & South East operators.



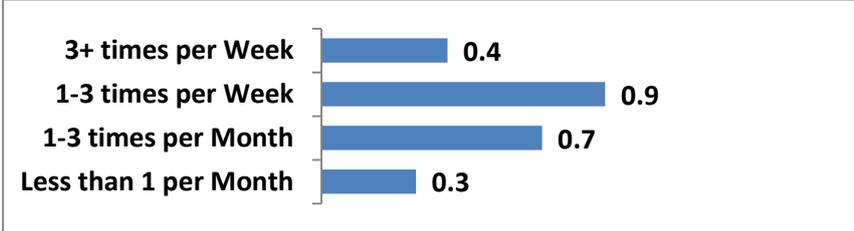
**Figure 20 – How Website Compares with Others (Mean Score) by Retailer Category**

Mean score calculation: This Website is... The Best +3, Better than Most +2, Better than Some +1, About the Same 0, Worse than Some -1, Worse than Most -2, The Worst -3

Those most likely to compare the site favourably to others were those conducting Scenario 1, ‘Standard Day Return ticket’ and Scenario 6 ‘16-25 Railcard ticket’. Surprisingly, those conducting Scenario 2

'Cheapest Single ticket' and Scenario 7 'Senior Railcard ticket' were least likely to compare the site favourably to others, with about a quarter of these shoppers making a positive comparison.

As the chart below illustrated, there was no correlation between the frequency of shopping online and the mystery shoppers enthusiasm of using rail websites.



**Figure 21 – How Website Compares with Others (Mean Score) by Frequency of Shopping Online**

Mean score calculation: This Website is... The Best +3, Better than Most +2, Better than Some +1, About the Same 0, Worse than Some -1, Worse than Most -2, The Worst -3

## **5.9 Receipt of Tickets**

### **5.9.1 Was Your Ticket Available to Collect?**

In all cases in which tickets were to be collected from a Ticket Vending Machine or Ticket Office, the tickets were available for the mystery shopper to collect.

### **5.9.2 How Many Days Did it Take for Your Ticket to Arrive by Post?**

In all instances where tickets were delivered to the mystery shopper at home, delivery took place in one or two days.

Almost all of those receiving their tickets via this method commented that, based on the information provided on the website, this delivery speed was in line with their expectations.

## **6. Terminology**

### **6.1 Was there any Terminology you did not understand?**

Almost all customers were happy that they understood all the terminology on the website they used; with just 2% of customers stating that they did not understand a term or phrase on the website.

### **5.9.2 What was the main improvement that would make ticket buying on the website more user friendly?**

56% of customers stated that they could think of at least one improvement that would help the purchase experience become more users friendly and provided relevant verbatims.

A large proportion of these verbatims were related to specific, isolated experiences but the reoccurring themes included the need for more clarity around postage / collection options, easier access to the cheapest ticket option and improving the overall layout of the website.