Rail Delivery Group

**Ticket Retail
Mystery Shopping 2018**

**Executive Summary Report
(All Modes)**

December 2018

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Contents

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1.   Introduction

This report summarises the key findings of RDG's 2018 ticket retail mystery shopping survey, which included mystery shoppers making ticket purchase transactions via the three main purchase channels:

- Ticket Office
- Ticket Vending Machine (TVM)
- Online

The key objective of the exercise is to determine whether mystery shoppers, as representatives of the ticket buying public, can purchase the most appropriate ticket for their given journey requirement. To pass this test, tickets must be valid for the full journey, must meet the mystery shopper's requirements and must not carry any risks of penalty. More importantly, we are checking that the mystery shopper is sold the cheapest fare for their stated requirements.

In the case of Ticket Office transactions, the mystery shopper is interacting with a member of staff, hence the results show us whether the ticket has been sold correctly. In the case of TVM and Online purchases, where there is no personal involvement on the part of the retailer, the results demonstrate the ability of the mystery shopper, as a representative of the ticket buying public, to correctly navigate the TVM or website to purchase the correct and best value ticket for their travel scenario.

In 2017, the sample design was altered to more accurately reflect the relative importance of the different ticket sales channels and the mix of sample sizes was maintained in 2018. A total of 3,000 mystery shops took place in 2018, split by purchase channel as follows:

Purchase Method	No. of Completed Mystery Shops
Ticket Office	1,300
TVM	1,000
Online	700

Whilst sampling was carried out to reflect the pattern of rail ticket sales transactions, weighting was applied to the survey data to ensure the results reflected actual transaction data as closely as possible.

2. Methodology

2.1 Survey Methodology

The mystery shopping fieldwork was carried out by members of ESA's national panel of mystery shoppers. These mystery shoppers are representative of the general ticket buying population and have no more knowledge of the railway or its fares than an average member of the public.

In all cases, across all three purchase channels, the tickets purchased were returned to ESA and 'marked' by ESA staff, fully trained in the use of the rail fares database, to provide an accurate assessment as to whether the most appropriate ticket had been sold for that specific journey and travel scenario.

2.2 Scenarios

The key principle underlying the design of the survey methodology is that sampling is undertaken in a way that reflects current customer transactions. The scenarios used by mystery shoppers were therefore based on the most recent ticket purchase data.

For each mystery shop, the shopper specified the following details at the point of purchase:

- Journey path
- Time of travel - whether purchasing for travel on that day ('turn up and go') or an advance purchase
- Single or return journey
- Discounts (e.g. railcards) and concessions, where applicable

The scenarios used for the three purchase channels were as follows:

| Ticket Type	Ticket Office	TVM	Online
Single Journey	✓	✓	✓
Return Same Day	✓	✓	✓
Return in 7 Days	✓	✓	✓
Travel with Other Adults	✓	✗	✓
Remote Sale	✓	✗	✗
Frequent Traveller	✓	✗	✗
Advance Purchase	✓	✗	✓
Weekly Season	✗	✓	✗
Monthly Season	✓	✗	✗
First Class	✓	✓	✓
Railcard (Family, 16-25, Senior, Network, Disabled, Two Together)	✓	✓	✓

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The detailed scenario requirements were designed to reflect typical buying behaviours and shown below are the details of what the mystery shopper requested in each case:

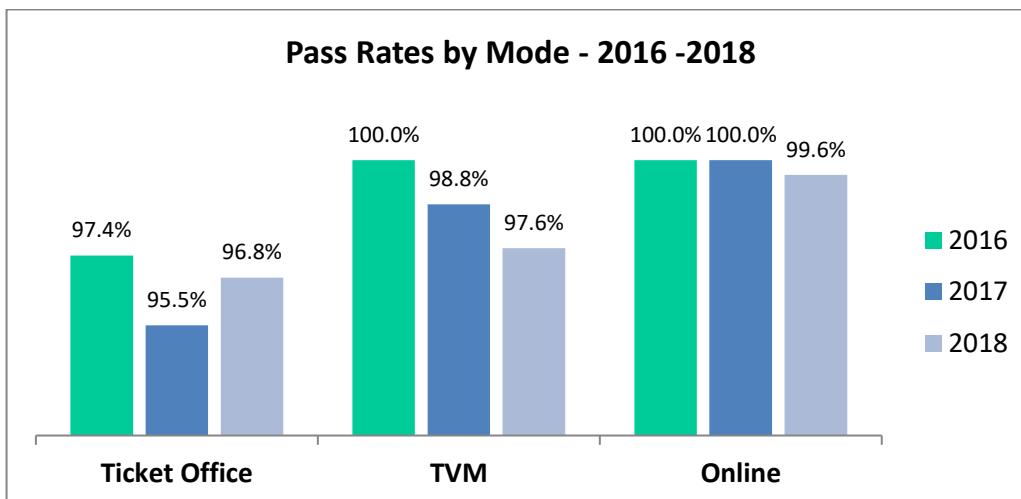| Ticket Type	Description
Single Journey	A 'turn up and go' test – with shoppers asking for the Cheapest or most Flexible tickets.
Return Same Day	A 'turn up and go' test – with shoppers asking for the Cheapest or most Flexible tickets.
Return in 7 Days	A 'turn up and go' test – with shoppers asking for the Cheapest or most Flexible tickets.
Travel with Other Adults	Shoppers stated they are travelling with one other adult under the 'Two Together' Railcard discount.
Remote Sale	One of the more complex scenarios: The shopper asks for an origin of travel that is different to the purchase point. All shoppers asked for the Cheapest tickets.
Frequent Traveller	3, 4 and 5 consecutive travelling day requests – the clerk (Ticket Office) must discern between selling day tickets vs a weekly season to offer the cheapest option possible.
Advance Purchase	Shoppers buy tickets 2 weeks in advance – this tests if advance fares were offered (where available) and if correct return dates were applied (Return 1 week after the outward journey is requested).
Weekly Season	The shopper taps 'weekly season' on screen (TVM) for their respective journey path.
Monthly Season	A standard monthly season ticket.
First Class	All First Class tickets excluding seasons and advance purchases. Returning on the same day.
Railcard (Family, 16-25, Senior, Network, Disabled, Two Together)	A railcard discount is requested. For Disabled Persons railcards (DPRCs), accessibility (and minimal interchanges) are the key priorities. For all other railcards, being offered the cheapest option is key. Return on the same day or in a weeks' time (note for DPRC – the outward journey was set to be 5 days in advance for the necessary concessions to be made/offered).

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3.   Key Findings

3.1   Ticket Accuracy (Pass Rates)

Following the changes made to the sample design, which now more accurately reflects the relative importance of the different ticket sales channels, this has enabled the calculation of an overall (all modes) pass rate. As illustrated in the following chart, the overall (weighted) pass rate for ticket retailing in 2018 is 97.9% - an identical result to 2017.

2018 Pass Rates by Mode

Mode	Pass Rate
Overall (All Modes)	97.9%
Ticket Office	96.8%
TVM	97.6%
Online	99.6%
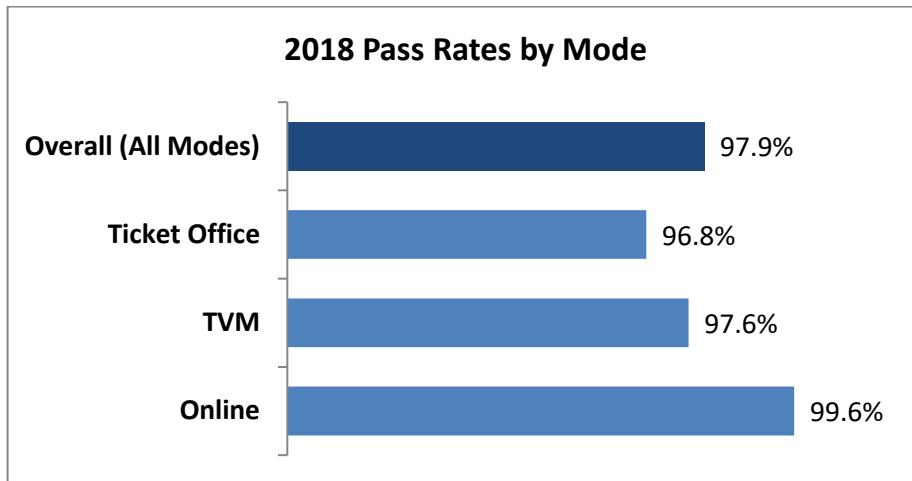
The overall 2018 pass rate is the same as in 2018 but as can be seen below there are variances in the different ticket purchasing methods: Ticket Office improving and the other 2 ticket purchasing methods falling back slightly.

Pass Rates by Mode - 2016 -2018

Mode	2016	2017	2018
Ticket Office	97.4%	95.5%	96.8%
TVM	100.0%	98.8%	97.6%
Online	100.0%	100.0%	99.6%

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3.2   Ticket Office - Reasons for Mis-sold Tickets

The main reasons for Ticket Office staff failing to sell the correct ticket this year are as follows:

Top Reasons for Incorrect Ticket (2018)	No. of Cases
Cheaper routed ticket not sold	9
Off-peak rather than peak	6
Refused to sell ticket	5
Incorrect date of travel	4

The most frequent failure this year was that of not selling a cheaper routed ticket, which accounted for more than a fifth of all failures. This was also the most common reason last year when it accounted for almost a quarter of failures. The next most common failing was where an off-peak ticket was sold rather than a more appropriate peak ticket.

Partial Retailing

There was a small amount of evidence for potential partial retailing in 2018. Partial retailing is defined to have taken place where the retailing TOC issued a ticket with a route that 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.

There were six such instances identified this year, all of which fell into the 'Cheaper routed ticket not sold' category.

There is no evidence, though, of any deliberate strategy by a TOC to increase its earnings through partial retailing.

Clerk's Questions and Actions

A key reason for tickets being incorrectly sold appears to be that clerks do not consistently ask customers enough questions about their travel requirements.

The following tables highlights the proportion of mystery shops (when applicable for the scenario) in which the clerk asked these questions or made these suggestions:

1. Questions Asked – Outward Journey	
Exactly where going?	37%
At what time are you departing?	50%
Can you travel earlier/later?	20%
Can you take a slower service?	6%
Would you mind changing trains?	5%
Which route are you taking?	9%

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2. Questions Asked – Return Journey	
When are you coming back?	66%
At what time of day are you returning	41%
Restrictions on return journey made clear	38%
3. Questions Asked – Cheaper Tickets	
Cheaper ticket – departing later	10%
Cheaper ticket – slower route	3%
Cheaper ticket – changing trains	3%
Cheaper ticket – off-peak return	50%
4. Questions Asked – Railcards	
Asked if had railcard	32%
Suggested buying railcard to reduce journey cost	3%

For the outward journey, the clerk attempts to confirm where the passenger wants to travel in only just over a third of the cases and in only half of cases asks when they want to travel.

As regards the return journey, in 66% of cases the clerk asks the date of return, however this proportion falls to 41% for the time of the return journey and is 38% for confirming any restrictions applicable to the return journey.

In respect of questions 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), the number of times the clerk suggests 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 proportion of cases where this is asked, apart from the off-peak return option which is asked half of the time.

The 32% who asked if the customer had a railcard is higher than 2017 (25%) and 2016 (21%) and the improvement over 2017 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 just 3%.

3.3 TVM & Online User Experience & Satisfaction

3.3.1 User Experience

TVM Transaction Times

Across the total sample, 12% of mystery shoppers had to queue to use the TVM, down from 14% in 2017. Including any time spent queuing to use the TVM, the average time taken for a ticket purchase was 2 minutes 47 seconds. Excluding queuing time, the average TVM transaction time was 2 minutes 32 seconds.

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As shown below, scenarios involving a railcard took somewhat longer to complete that those without.


Not surprisingly, the above pattern is also seen in the number of transaction steps (or TVM screens) required to complete the transaction. While the average for all TVM purchases was 6.4 steps (up from 5.8 in 2017), the figure is significantly higher (7.2 steps) for purchases involving a railcard.

In addition, shoppers who purchased 'Return in 1 Week' tickets required a greater number of transaction steps than those conducting more straightforward scenarios.
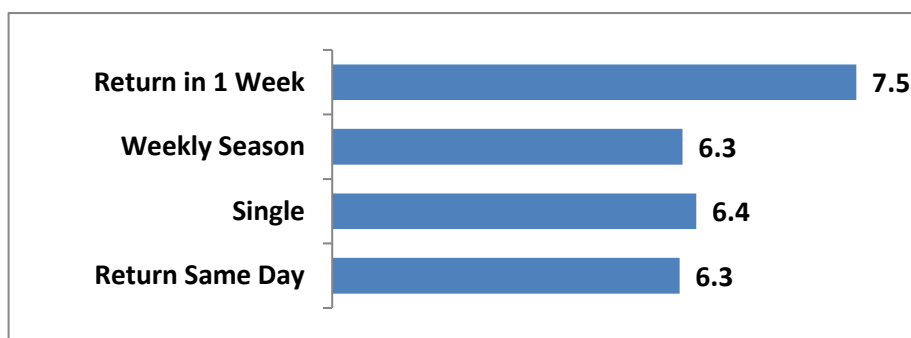

Online Transaction Times

The average time taken for an online ticket purchase fell further this year, to just under 5½ minutes, compared with 6 minutes 20 seconds in 2017. This reduction in transaction time is primarily due to a reduction in time spent on Long Distance Operator websites, while Third Party Retailers also showed a small reduction. The average transaction time for Third Party websites was significantly lower than for TOCs.

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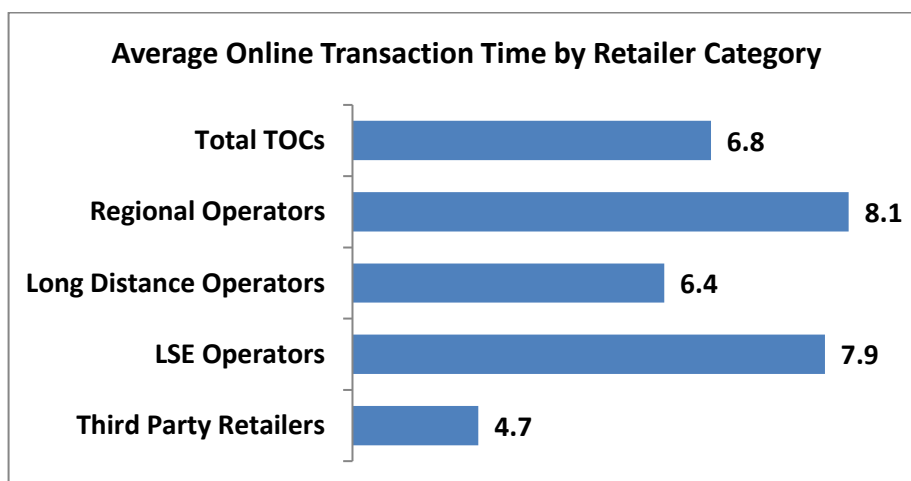
The number of web pages viewed by mystery shoppers in undertaking their online purchase was largely unchanged from previous years at an average of 6.9 (compared with 6.8 in 2017, 7.0 in 2016, 6.9 in 2015 and 6.8 in 2014).

Those purchasing from third party retailer websites viewed fewer pages on average than TOC website users.
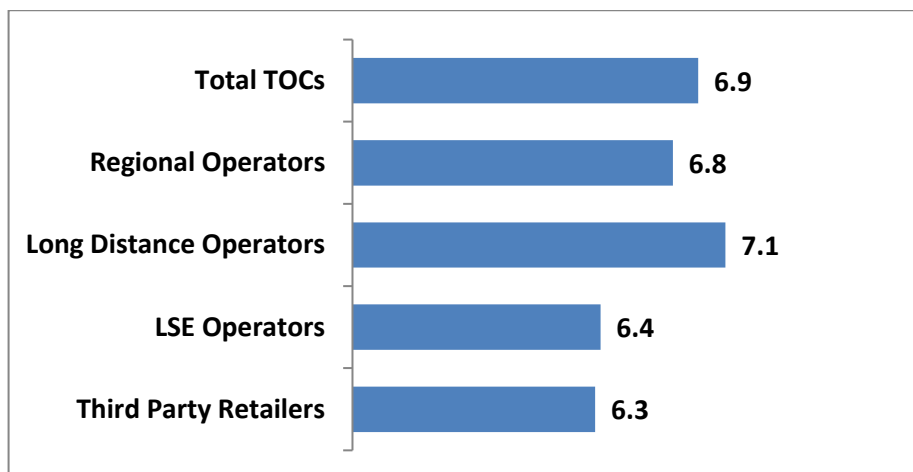
3.3.2 User Satisfaction

TVM and Online users were asked similar questions regarding ease of use and satisfaction with the purchase process, hence results for the two purchase modes are compared here.

Ease of Finding Information on Ticket Types & Conditions

While the large majority of both TVM and Online users found no difficulty in locating information on ticket types and conditions (when there was a need to do so), Online purchasers were somewhat happier with this aspect of the user experience, being more likely to rate this aspect as 'Very Easy' or 'Easy'.

Ease of Finding Info. on Ticket Types/Conditions

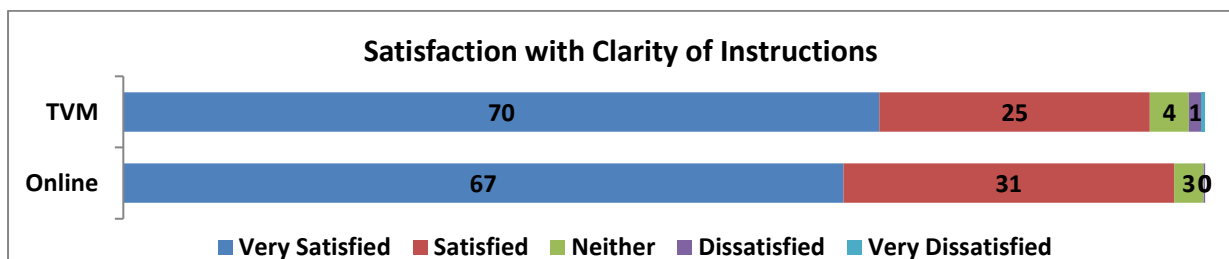|	Very Easy	Easy	Neither	Difficult	Very Difficult
TVM	56	28	12	2	
Online	63	29	7		1
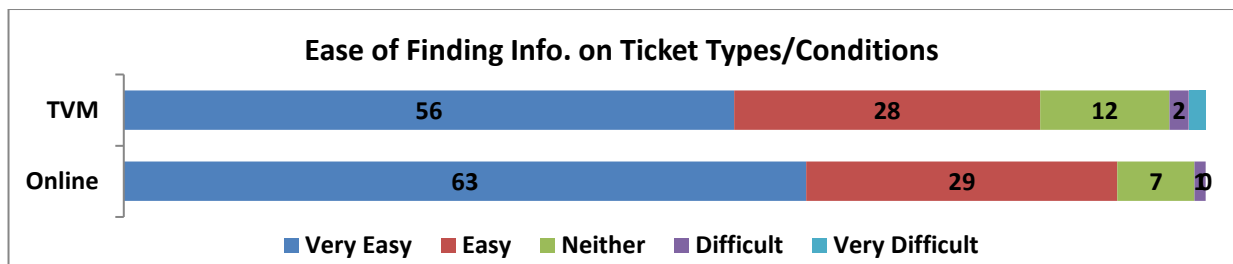
Satisfaction with Information on Ticket Types & Conditions

Having located the required information on ticket types and conditions, there was little evidence of dissatisfaction with the quality of this information. A higher proportion of Online users were 'Very Satisfied' with the information.

Satisfaction with Info. on Ticket Types/Conditions

	Very Satisfied	Satisfied	Neither	Dissatisfied	Very Dissatisfied
TVM	57	32	7	3	
Online	63	32	4		1
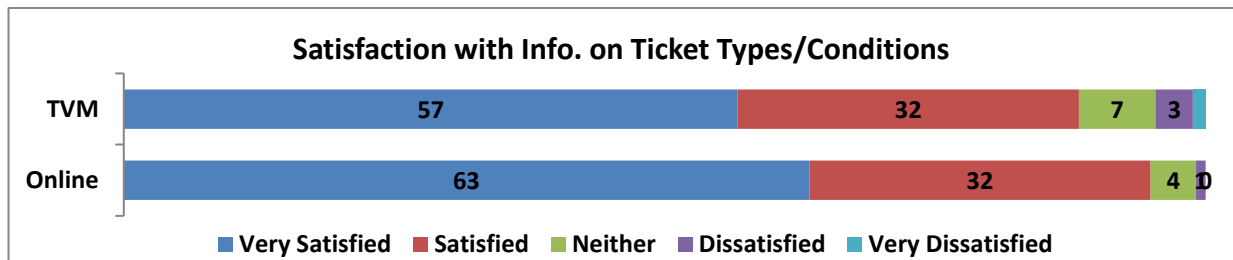
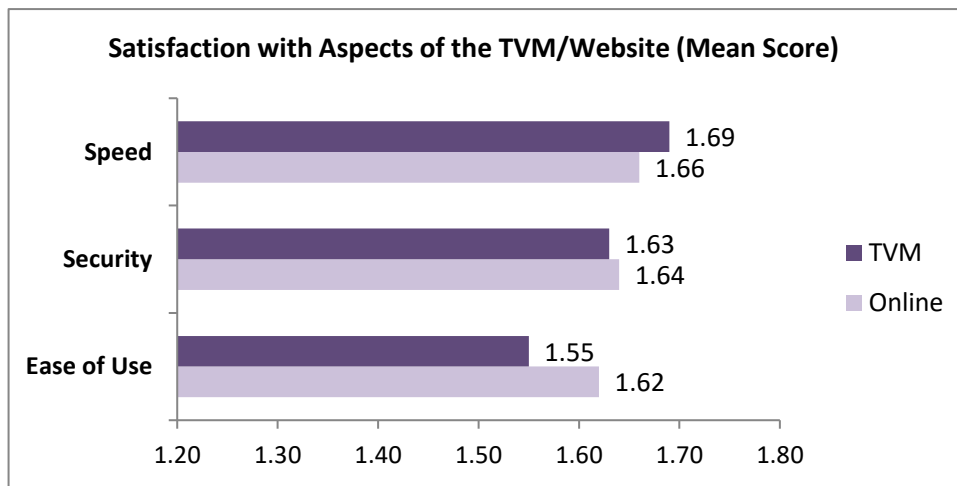Satisfaction with Clarity of Instructions for Using TVM/Website

TVM users were a little more likely to be 'Very Satisfied' with the clarity of the instructions, although both groups expressed very high satisfaction levels on this topic.

Satisfaction with Clarity of Instructions

	Very Satisfied	Satisfied	Neither	Dissatisfied	Very Dissatisfied
TVM	70	25	4	1	
Online	67	31	3	0	

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Unsurprisingly, for TVM users there is a clear correlation between the duration of the ticket purchase transaction and satisfaction with clarity of instructions.

Satisfaction with Usability of the TVM/Website

As illustrated below, mean satisfaction scores for all usability (speed, security and ease of use) of the TVM and website received high levels of endorsement. Where +2 is the highest satisfaction level and -2 the lowest, all these attributes scored in the 1.5-1.7 range, with no clear difference seen between TVM and Online users.

Satisfaction with Aspects of the TVM/Website (Mean Score)

Attribute	TVM	Online
Speed	1.69	1.66
Security	1.63	1.64
Ease of Use	1.55	1.62

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

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3.3.3 Suggested Improvements

Mystery shoppers were asked to comment on whether there were improvements that could be made to the TVM/Online process that would improve the user experience.

The main themes to emerge from these comments are summarised below:

TVM	Online
Accept American Express for payment	Booking fees/credit card charges too high or unclear
Easier/clearer use of Railcards	Highlight the cheapest fares
Easier/clearer descriptions of ticket types	Offer ticket printing at home
More responsive touch screen	Improve registration / log in process
Reduce screen glare	Simplify the ticket options
Provide additional information e.g. next departing service and platform or show a map of the route	Improve visibility of ticket options / journey information

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4.   Conclusions

The results of the 2018 mystery shopping survey indicate that across all three main purchase channels, customers can feel reasonably confident of obtaining a ticket that meets their needs in terms of being appropriate for their specified journey and being the cheapest ticket available. The overall weighted (all modes) pass rate was 97.9%.

In the case of the Online channel, for the second year running, 99.6% of tickets purchased by mystery shoppers were deemed to be correct.

The result of the TVM mystery shopping also produced a very high overall success rate, with 97.6% of shoppers purchasing the correct ticket.

Those using ticket offices were, as in 2017, those least likely to receive the correct ticket, this channel achieved a pass rate of 96.8% this year, an improvement on 2017 and beating the target of 96.5%

The high level of accuracy seen in the Online and TVM purchase modes is consistent across the various ticket types and purchase scenarios. Within the ticket office sales channel however, the patterns within incorrect ticket sales highlight some areas where actions can be taken to improve retail performance:

- The most significant failure this year was that of not selling a cheaper routed ticket, which accounted for over 20% of all failures.

- There were also two other significant categories - where an off-peak was sold rather than more appropriate peak or where the clerk refused to sell a ticket.

- Encourage a culture among clerks of asking confirmatory questions to ensure a full understanding of the customer's requirements.

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