

National Rail 2015 Mystery Shopping Survey results

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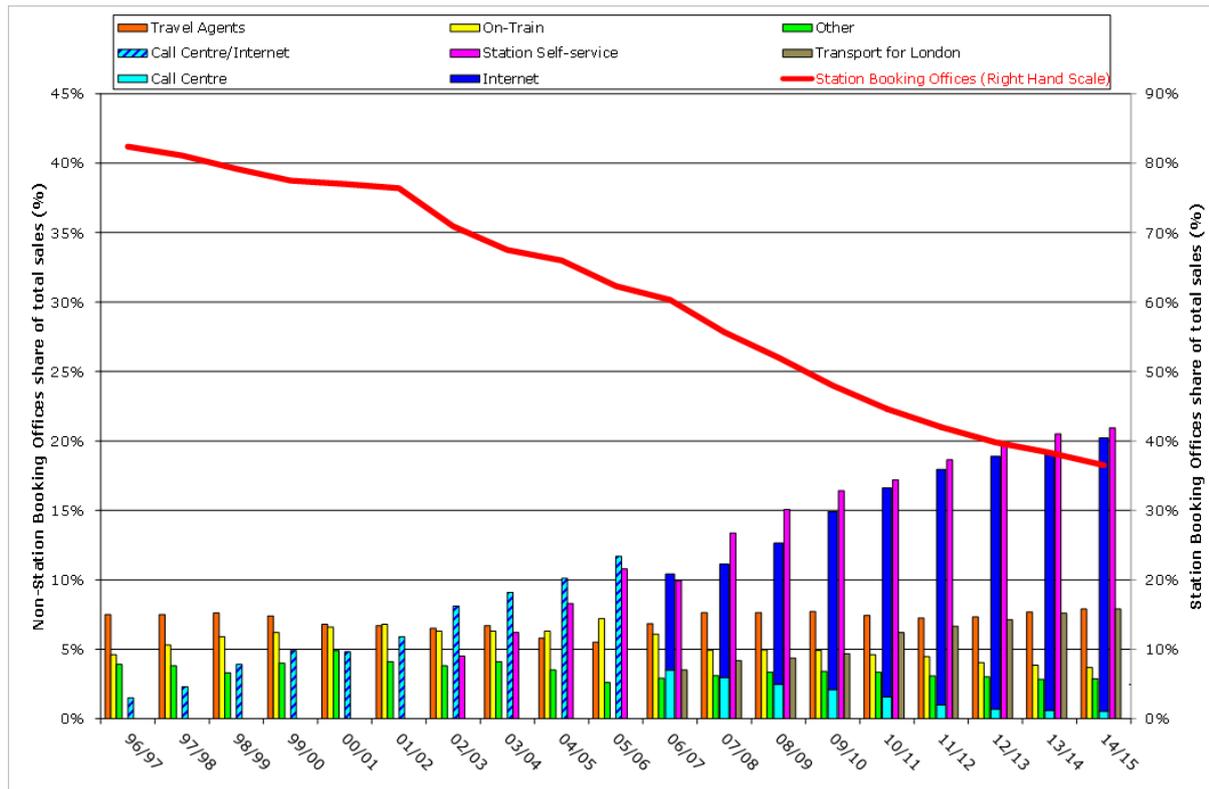
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1. Introduction

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 Line by Line who also produce the results report for the Ticket Office surveys. The fieldwork for all surveys is carried out by ESA Retail, 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 As in 2014, 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 83% (87% last year), followed by the First Class Scenario which had a score of 91%.
- 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. The number of fails attributed to these reasons grew from a third of all 'fails' in the last year to almost half in 2015.

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 **97%** was achieved for the correct product being sold, which represents a 6% increase from last year.
- 2.2.3 The total time the shopper takes to complete their TVM purchase did correlate with their ability to obtain the correct ticket; shoppers completing their transaction in less than 2 minutes had a 100% pass rate reported as compared to 87% for those taking longer than 5 minutes. There was no clear correlation between experience of buying tickets from TVM machines and a shopper's ability to purchase the correct ticket, although it is noted that those buying tickets least frequently (defined as less than once a year) had an 89% pass rate compared to almost 100% for more frequent buyers.
- 2.2.4 On average, the total TVM transaction time (excluding queuing) was 2 minutes 9 seconds and shoppers were able to complete their transactions in an average of 5 steps (5 web pages).
- 2.2.5 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 found it difficult to find the information they needed this year as compared to 9% last year and 7% in 2013. In addition to this, only 5% of shoppers cited terminology they didn't understand.
- 2.2.6 The three most common suggested improvements to the user experience of TVMs was better touch screen sensitivity, more information on ticket types and the facility for quick contactless payment.

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 **95%** was achieved for the correct product being sold on TOC ticketing websites.
- 2.3.3 Similarly, 95% of the sample felt confident that they had been able to purchase the correct ticket. The ability to see all cost and time details on one screen was the most common reason given for respondents choosing to use a particular website.
- 2.3.4 Over 90% of shoppers stated that their chosen website was either satisfactory or very satisfactory in terms of displaying train times, efficiency and ease of use. The majority of shoppers were further satisfied with the design features of their chosen website, with over 95% rating websites as having a welcoming, contemporary layout and being a suitable representation for an online rail service.
- 2.3.5 Over 50% of shoppers were purchasing either standard class Advance fares or a standard class Off-Peak return ticket.

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 2014. The ticket purchases are split into scenarios using assumptions laid out in section 3.3 (Methodology Summary).

Overall sample sizes were the same as last year with 2,000 shops. However, there were two significant changes to the methodology this year:

- There were no minimum sample sizes for scenarios so that scenarios could be selected at random based on ticket type. For this reason, there were much lower sample sizes for First Class and Disabled Railcard;
- There was one restriction placed on scenario sample size. A maximum of 236 Scenario 1 records were set to ensure that this scenario would not be too dominant in the sample. However, the impact of this scenario is then restored with the weighting process;
- For the purposes of scenario analysis, some records which were picked at random were permitted to count towards more than one Scenario. For example, purchasing a Brighton-London ticket at Worthing ticket office with a 16-25 Railcard would previously have been allocated to the Remote Scenario and the Railcard element removed. However, this year, the record was permitted within each Scenario. This meant that the records available for scenario analysis were a little higher than the 2,000 improving statistical significance. Also the survey was more representative as it took into account more transactions with multiple facets.

Although some records were allocated to more than one Scenario, each record was given a primary Scenario. Note also that the lack of minimum sample sizes meant a reduction in some scenarios (1, 3, 4, 6, 7, and 10) and a corresponding increase in others (especially 2, 8 and 9). (*Please see table below*).

Table 1: Comparison of sample sizes for 2015 and 2014

Scenario No.	Scenario Description	2015 target shops	2014 target shops
1a	Turn up & Go, return same day. Priority = flexibility/speed	307	343
1b	Turn up & Go, Single. Priority = flexibility/speed	102	127
1c	Turn up & Go, Return same day. Priority = cost	13	14
1d	Turn up & Go, Single. Priority = cost	7	7
2	Turn up & Go return 7 days' time	247	175
3	First Class	10	142
4	Advance Purchase	116	180
5	Remote Sale	248	174
6a	Frequent traveller (5 days a week)	129	104
6b	Frequent traveller (4 days a week)	43	66
6c	Frequent traveller (3 days a week)	43	73
7	Monthly or longer season ticket	82	119
8	Travelling with other adults	226	165
9a	Railcard-Senior	153	67
9b	Railcard-Family & Friends	29	14
9c	Railcard-Network	32	20
9d	Railcard-16-25 year old	173	80
10	Disabled traveller (using Disabled Persons Railcard)	40	130
Total		2,000	2,000

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	First Class	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 on the day of purchase (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 on the day of purchase) 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 2015 was obtained from the LENNON sales database for each ticket sales location for each retailing TOC. This was broken down by Ticket Type, Ticket Status (i.e. with or without Railcard, and adult or child), and associated journey origin and destination. Records with differences between ticket selling location and journey origin were used in conjunction with Scenario 5. During this stage, the outputs were checked and the following sales points were removed:

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

As noted earlier, this year's methodology was different from last year in terms of primary and secondary scenarios and no minimum sample sizes for scenarios.

Accordingly Line by Line selected a disproportionate stratified sample, selecting a maximum of 236 flows (where a flow is defined as a unique origin-destination-scenario combination) from Scenario 1, while the other scenarios were sampled in direct proportion to the ticket types and travel cards representing the Scenario.

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 3.3.4). However the new methodology has reduced the size of weights slightly from previous surveys. This in turn reduces the sample error.

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 within each scenario for each TOC was 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) with three exceptions:

- Scenarios 1c and 1d were based on choosing which of the 429 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 tickets purchased with group travel cards and group ticket types.

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

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. At 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 was a representative range of station sizes being sampled in 2015. 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 2015
1	> 750,000	12	12
2	> 195,000	190	183
3	> 47,000	551	361
4	< 47,000	617	162
Total		1,371	718

3.3.4 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. Note that these have changed slightly from last year given that we have allowed secondary scenarios for some records.

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 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

3.3.5 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.

4 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.

5 Analysis of Results

5.1 Response Rates

42 of the 2,000 (2.1%) of the mystery shops were not completed successfully, leaving 1,958 completed transactions (97.9% response rate) for analysis. This is marginally higher than last year (97.7%) and higher still than 2013 (97%). The main reasons for the reduction from 2,000 to 1,958 were as follows:

- 15 records (0.8% 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 and were removed from the analysis sample. More on these records is shown in section 6.1. This proportion of closures is higher than that recorded last year (0.3%).

- There were seven cases where the transaction did not take place because paper tickets were not available at the ticket office
- There were two cases where the ticket could not be purchased because the clerk insisted on selling Oyster
- There were 15 records (0.8%) where transactions were considered “void” because it was unclear from the shopper records whether they were passes or fails. This is a better position than last year where this figure was 1.3%.

A breakdown of the completed shops by scenario is shown in Table 5 below.

Table 5: Completed transactions by Scenario (based on primary Scenario)

Scenario Number	Scenario Description	Sample size	Completed	Response rate
1	Turn Up and Go, return same day	429	425	99.1%
2	Turn Up and Go, return 7 days	247	244	98.8%
3	First Class	10	10	100.0%
4	Advance Purchase	116	112	96.6%
5	Remote Sale	248	240	96.8%
6	Frequent Traveller	215	207	96.3%
7	Monthly Season ticket	82	80	97.6%
8	Travelling with other adults	226	225	99.6%
9	Railcard	377	375	96.9%
10	Disabled Railcard	40	40	100.0%
Overall		2,000	1,958	97.9%

5.2 Success Rates

The 1,958 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 2015.

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 behaviour changes as opposed to random fluctuations or “scatter” in the pass rate data such as might result from choosing a different sample of stations or survey dates (e.g., staff may differ).

As per previous years, the target pass rate was 96.5%. The overall (all-Scenario) score of 94.8% this year is below this target and with a confidence interval of 0.9%, this result is statistically significant.

The overall score of 94.8% is slightly below last year’s score of 95% but this difference is not statistically significant.

Table 6 shows that on an individual scenario level, there are no scenarios that are significantly different from last year – significance defined as the difference between the 2015 pass rate and the 2014 pass rate being higher. However, the decline in the Frequent Traveller Scenario over last year is almost statistically significant.

Table 6: Mystery Shopper Success Rates by Scenario

Scenario Number	Scenario Description	Pass rate 2015	95% Confidence Interval 2015	Sample Size 2015	Pass rate 2014
1	Turn Up and Go, return same day	96.9%	1.6%	425	96.1%
2	Turn Up and Go, return 7 days	92.2%	3.4%	244	94.3%
3	First Class	90.9%	17.0%	11	95.7%
4	Advance Purchase	95.1%	3.5%	144	94.8%
5	Remote Sale	93.0%	3.0%	271	91.9%
6	Frequent Traveller	82.6%	5.0%	219	87.4%
7	Monthly Season ticket	98.8%	2.4%	80	97.4%
8	Travelling with other adults	95.2%	2.8%	229	93.2%
9	Railcard	93.6%	2.2%	469	94.3%
10	Disabled Railcard	95.2%	6.4%	42	95.3%
Overall		94.8%	0.9%	2,134	95.0%

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 Regional TOCs scoring highest. While the difference between Regional and the other sectors is statistically significant, the difference between Long Distance and L&SE is not. The Long Distance TOCs went from being the highest performing sector last year to the lowest this year, largely because of a sharp rise in the number of journeys where the cheapest route was not sold (see Section 5.3). Similarly, the L&SE segment score was lower primarily because of a reduction in the performance of the Frequent Traveller Scenario.

Table 7: Unweighted pass rates by industry sector

Sector	Pass rate 2015	Pass rate 2014	Pass rate 2013
Long Distance	91.3%	95.8%	97.6%
London and South East	91.7%	93.6%	94.6%
Regional	95.0%	93.1%	94.9%

5.3 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 Type.

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
Cheaper routed/dedicated ticket not sold	5	14	1	4	10	5	1	4	23	1	68
Day tickets rather than cheaper weekly						25					25
Off-Peak rather than Peak	3	2			4						9
Incorrect date on ticket		2		3	1	1		1			8
Incorrect discount applied	1			1	1			4		1	8
Single instead of return	1	1							2		4
Weekly rather than cheaper day tickets						4					4
Incorrect destination					1	1			1		3
Peak rather than cheaper Off-Peak									3		3
Incorrect origin				1					1		2
Multimodal rather than cheaper rail only	2										2
Refused to sell ticket					1	1					2
Return instead of single	1				1						2
Incorrect number of tickets						1					1
Grand Total	13	19	1	9	19	38	1	9	30	2	141

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 2, 5 and 9. 68 of the 141 failures overall (i.e. nearly a half) arose from this type of failure. As a proportion of total records, this has risen from around a third of all failures in last year’s survey.

Some of the rise in this type of failure results from an increase in sample sizes for these three scenarios relative to last year; however, this does not explain all the increase in this type of failure and there is therefore evidence that failing to sell cheaper routed/dedicated tickets is rising over time.

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 four instances of this last year, there were only two 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 eight instances of pricing failure this year, compared with 11 last year. Of the eight failures, none were associated with the Railcard Scenario (Scenario 9) while half 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 131 of the 141 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 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 eight failures within Scenario 1a, resulting in a pass rate of 97.4% for this sub-scenario – a similar score to last year’s 97.1%. Four of the eight failures were for selling an Off-Peak Ticket rather than the more flexible Anytime Ticket that the scenario demanded.

Scenario 1b scored only one failure (and a score of 99%) this year compared with five failures last year. This result is to be expected as this sub-scenario is the most straightforward of all. The failure was for selling a return rather than a single.

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 two fails were recorded in each of these scenarios, this led to scores of 84.6% and 71.4%, 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 92.2% this year, down on the 94.3% last year, although not a statistically significant decline. As noted above, most of the failures (around three quarters) were associated with cheaper dedicated or cheaper routed tickets not being offered.

First Class

Like Scenario 2, this scenario recorded a decline on last year, although owing to reductions in sample size not a statistically significant one. There was only one failure - not selling a cheaper routed/dedicated ticket.

Advance Purchase

This scenario score of 95.1% was almost identical to last year's score of 94.8%. As last year, the main reasons for failure were not associated with the advance nature of the product, such as not offering Advance products to the shopper which had dominated the failures in this scenario before 2014. There were nine failures this year, mainly cases of not selling a cheaper routed/dedicated ticket or incorrect dates on the ticket.

Remote Sale

This scenario improved on last year although this change was not statistically significant. There were 19 failures this year, just over half of which involved not selling a cheaper routed/dedicated ticket.

This is one of the more complex scenarios and it is interesting to note that there were no cases 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 reduction on last year, which was very nearly statistically significant. Of the 38 failures recorded, 25 involved selling several day return tickets rather than a cheaper weekly season (significantly worse than last year) and a further four cases involved the reverse situation – selling a weekly season rather than cheaper day tickets. There were also five cases of not selling a cheaper routed/dedicated ticket.

Note that, as in the previous two years, 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 (90.7% and 83.3%, respectively) than travelling five times a week (only 80.3%). 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 16 cases where day returns were sold rather than a cheaper weekly season ticket.

Monthly Season Ticket

This scenario was the highest scoring this year, as last year. Only one failure was recorded - not selling a cheaper routed/dedicated ticket.

Travelling with other Adults

This scenario scored higher than last year, although the increase was not statistically significant. The failures were dominated by not selling the tickets with a group discount which was available for the journey in question and not selling a cheaper routed/dedicated ticket.

Railcard

This scenario scored less than last year, although this was not statistically significant. Failures were dominated by not selling a cheaper routed/dedicated ticket. There were no cases this year of applying the wrong discount (i.e., not applying the 34% discount).

This scenario is split between four sub-scenarios, Senior, Family and Friends, Network and 16-25 Railcards. There were similar scores between the different Railcards this year (92.3%, 92.9%, 90.6% and 91.9%, respectively).

Disabled Railcard

The score for this scenario was very similar to that last year, although there is a relatively high confidence interval given a low sample size. There were two failures this year - failing to sell a cheaper routed/dedicated ticket and an incorrect discount.

5.4 Station Size Analysis

Analysis by station ticket office size was undertaken this year comparing station ticket offices with over 200,000 issues per year versus outlets with less than 200,000. Table 9 below shows that there is a small significant difference in pass rates between ticket offices based on the 2015 data (i.e., the difference between the pass rates is lower than the confidence interval), suggesting that as per last year, 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	91.3%	1,031	1.7%
Small	94.5%	927	1.5%

Note: these pass rates are unweighted

5.5 Level of Partial Retailing

There was some evidence of potential partial retailing in 2015 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 22 instances of "1", but none of "2". Each of the instances of "1" were within the 68 "Cheaper routed / dedicated ticket not sold" transactions identified in Table 8. There is no evidence of any deliberate strategy by a TOC to increase its earnings through partial retailing; indeed a number of the failures occurred due to staff failing to offer their own company's product in preference to an interavailable or rival one. However, there is a significant rise in this over last year (where there were only 8 cf. 22) and its increase needs to be highlighted as an area of concern.

6 Analysis of Quality factors

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

6.1 Ticket office closures

As noted, under section 5.1, there were 15 cases of ticket office closure in the survey this year.

Apart from one case, 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.

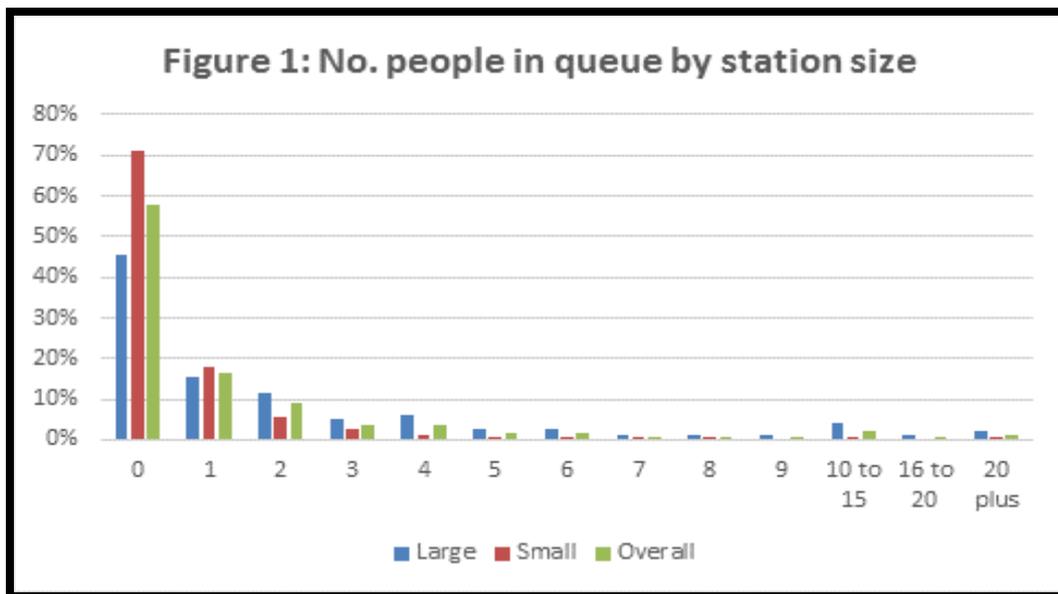
Of the 15 cases of ticket office closure, the mystery shopper readily received information on the reason for closure in nine cases.

6.2 Queuing Data

Two measures of queuing were recorded in the survey:

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

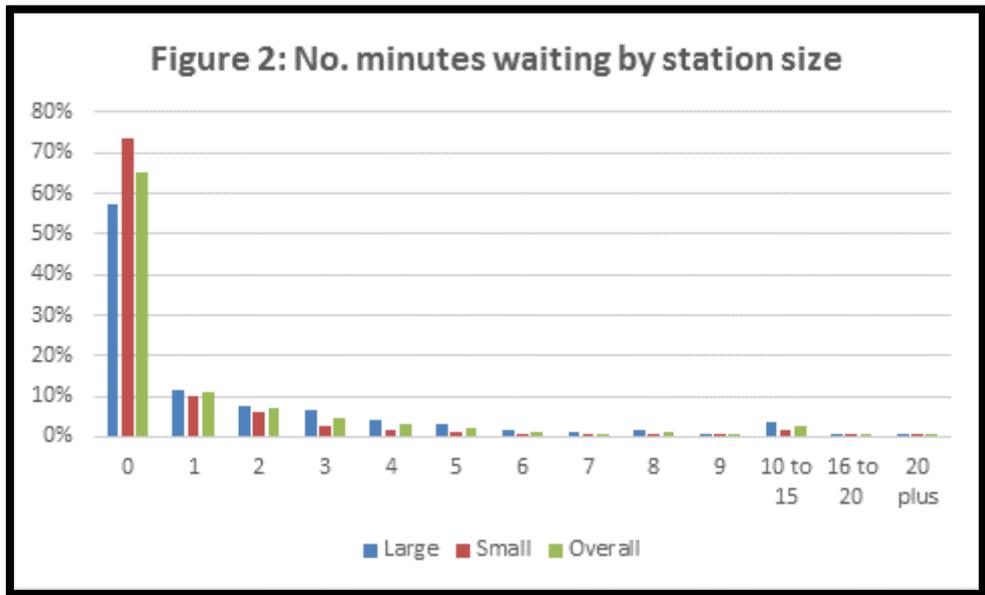
The average number of people in the queue ahead of the shopper on arrival was only 1.6, below the figure of 2 for last year (see Table 10). Despite the differences only appearing small in absolute terms, the differences over last year for Large, Small and Total are all statistically significant. The average of 1.6, though, hides a significant amount of variation as shown in Figure 1 below. Nearly three-quarters (70%) of the shoppers in the 2015 survey had no-one or only one person ahead of them in the queue. However, the long tail on this distribution (seen almost totally at the larger stations) pushes the average up to 1.6.



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	2015	2014	2013
Large	2.6	3.2	3.2
Small	0.5	0.7	0.8
Total	1.6	2.0	2.0



A similar pattern is observed in the average number of minutes waiting to be served. The average is 1.4 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 a significant change in the average minutes waiting to be served between 2015 and the previous two years.

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

Ticket Office size	2015	2014	2013
Large	1.9	2.5	2.4
Small	1.0	1.0	1.0
Total	1.4	1.8	1.7

6.3 Clerk’s questions and actions – outward journey

The Mystery Shopper surveys for 2015 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 below shows that in only around half of cases does the clerk attempt to confirm where the passenger wants to travel and in 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 while there are some differences here between Large and Small ticket offices, none 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	52.4%	50.5%	51.6%
When departing	69.7%	70.5%	70.0%
Can you travel earlier/later	21.0%	18.5%	19.9%
Can you take a slower service	5.7%	4.3%	5.1%
Would you mind changing trains	6.0%	4.3%	5.3%
Which route are you taking	8.3%	9.1%	8.6%

Note: All questions are adjusted by relevant Scenario but the results relate to all transactions within relevant Scenarios

Comparing these numbers with 2014 figures (Table 13) shows that clerks appear to be slightly worse than in 2014 at asking questions about the outward journey – although most of these are not statistically significant. There was one question which was significantly worse than last year – “can you travel earlier or later”? The question on which route are you taking saw a fall and this was close to being statistically significant. Lower performance in this area would be consistent with the growing number of failures in the main survey for not selling a cheaper dedicated/routed ticket (see Table 8).

Table 13: Proportion asking by question for outward journey

Clerk asked:	2015	2014	Statistical significance
Exactly where going	51.6%	50.1%	No
When departing	70.0%	72.0%	No
Can you travel earlier/later	19.9%	25.7%	Yes
Can you take a slower service	5.1%	5.5%	No
Would you mind changing trains	5.3%	7.3%	No
Which route are you taking	8.6%	13.0%	No

Note: All questions are adjusted by relevant Scenario but the results relate to all transactions within relevant Scenarios

6.4 Clerk’s questions and actions – return journey leg

This sub-section deals with questions that the clerk might be expected to ask about the passenger’s return journey. Note that as in 6.3 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 returning at specific times are relevant.

Table 14 below shows that in around 68% of cases, the clerk is trying to ascertain when the passenger is coming back. However, this proportion drops to 45% for time of day returning and just under a third 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	70.2%	65.6%	68.2%
Time of day returning	48.3%	41.7%	45.5%
Restrictions on return journey made clear	33.9%	31.7%	32.9%

Note: All questions are adjusted by relevant Scenario but the results relate to all transactions within relevant Scenarios

When compared with 2014, Table 15 below shows that in asking about when coming back has improved over last year. In contrast, performance in making the restrictions clear for the return journey has actually declined on last year.

Table 15: Proportion asking on return journey questions vs. 2014

Clerk asked:	2015	2014	Statistical significance
When coming back	68.2%	63.2%	Yes
Time of day returning	45.5%	43.0%	No
Restrictions on return journey made clear	32.9%	42.9%	Yes

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

6.5 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. Table 16 also shows that the large stations are superior to the small stations on all of these questions. Note that the difference is statistically significant in every case – a situation that did not apply last year for any of these questions.

Table 16: Proportion asking on cheaper tickets questions

Clerk asked:	Large	Small	Total
Cheaper ticket – departing later	13.0%	9.4%	11.4%
Cheaper ticket – slower route	4.3%	2.2%	3.4%
Cheaper ticket – changing trains	3.1%	1.3%	2.3%
Cheaper ticket – Off-Peak Return	49.9%	43.3%	47.1%

Despite the individual proportions being relatively low, however, there is ample evidence to suggest that these scores are significantly worse than they were in 2014 (Table 17) for two of these questions. The deterioration in clerks asking these questions will also help to partly explain the rise in not selling a cheaper routed/dedicated ticket.

Table 17: Proportion asking on cheaper tickets questions vs. 2014

Clerk asked:	2015	2014	Statistical significance
Cheaper ticket – departing later	11.4%	14.5%	Yes
Cheaper ticket – slower route	3.4%	3.7%	No
Cheaper ticket – changing trains	2.3%	3.2%	Yes
Cheaper ticket – Off-Peak Return	47.1%	45.0%	No

6.6 Clerk's question and actions – Railcard

This sub-section deals with two specific questions over Railcards (see Tables 18 and 19):

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

As per other questions in Sections 6.3 to 6.5, this analysis was confined to relevant scenarios.

In terms of asking whether the customer had a Railcard, the 25.7% scored here is higher than 2014 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 4.2%, although this is higher than last year's score and the difference is statistically significant.

Table 18: Proportion asking on Railcard questions

Clerk asked:	Large	Small	Total
If I had a Railcard	25.8%	25.7%	25.7%
Suggested buying Railcard to reduce journey cost	4.7%	3.6%	4.2%

Table 19: Proportion asking on other questions vs. 2014

Clerk asked:	2015	2014	Statistical significance
If I had a Railcard	25.7%	17.2%	Yes
Suggested buying Railcard to reduce journey cost	4.2%	2.6%	Yes

6.7 Conditions of carriage

As in the previous three years, a designated 10% of the shops involved the shopper also requesting to see the national conditions of carriage. Table 20 below shows that in just over 98% of transactions where the conditions were requested, a positive response was given. The difference between large and small ticket offices here is not statistically significant.

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

	Large	Small	Total
Proportion	98.4%	97.8%	98.1%

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). Compared with last year, though, there were more cases where a hard copy was provided permanently or temporarily. The increase in the positive response from last year to 98.1% is, however, not a statistically significant improvement.

Table 21: Range of positive response on Conditions of Carriage

Positive response to question	2015	2014
Advised to visit website	78.7%	84.5%
Given hard copy	6.5%	5.5%
Other	8.3%	1.8%
Hard copy to look at but had to give back	4.6%	3.6%
Total	98.1%	95.5%

7 Summary and Conclusions

The main points from the 2015 survey are as follows:

- The 2015 Retail Mystery Shopper Ticket Office survey showed a similar score to that recorded last year.
- The all-scenario pass rate of 94.8% was lower than the target of 96.5% and this difference is statistically significant.
- The best performing scenario was the Monthly Season Ticket Scenario, scoring 98.8%. This scenario and the Turn Up and Go Return Same Day (96.9%) Scenario were the only ones that exceeded the 96.5% overall target.
- There were no scenario scores that were statistically different from last year.
- The worst performing scenario was the Frequent Traveller Scenario with a score of only 82.6%. This scenario scored lower than last year (87.4%) and the difference was close to being statistically significant. The next worst scenario was First Class with a score of 90.9%
- The main reasons for failure this year were associated with issuing the wrong type of ticket, in particular not selling a cheaper routed/dedicated ticket and errors associated with the Frequent Traveller Scenario (especially selling day returns rather than a cheaper weekly). There were some areas of significant improvement however in reducing the number of times Peak tickets were sold rather than a cheaper Off-Peak and reducing the number of times a weekly was sold rather than a cheaper day tickets.
- The significant rise over last year in instances of possible partial retailing is a cause for concern.
- Analysis of qualitative factors shows generally that performance deteriorated over last year in many respects. While both queueing times and queue lengths improved slightly and there were some improvements in asking about when the customer was returning and whether they had a Railcard, there was a significant deterioration in asking about travelling earlier/later, communicating ticket restrictions and whether the customer was prepared to depart later or change trains to get a cheaper ticket. These declines had a significant effect on the overall pass rates as failure to sell a cheaper dedicated or routed ticket showed a major increase this year. A general picture emerges of clerks being less likely to ask important confirmatory questions about the transaction.
- A larger sample size this year by scenario has improved the likelihood that some changes in scenario performance will be statistically significant, even though there were no cases of that this year.

8 Actions to improve TOC retailing

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

- Improving awareness amongst staff of the cheaper dedicated or routed tickets that may be available for journeys sold from each ticket office. Staff should not make assumptions on a customers' behalf as to whether time of travel, length of journey or number of changes outweigh potential cost savings. Similarly, the clerk should not sell customers a more expensive flexible return ticket because they feel they do not have the time to exactly identify the customer's requirements for the return journey leg;
- Improving awareness amongst staff that it may not be clear cut as to the cheapest way of travelling for a number of days in a week and that they should check whether the weekly season or a number of day returns is appropriate;
- Improving concentration or checking by staff so that an Off-Peak return is not sold when a customer has requested a flexible ticket and/or immediate travel in the Peak period.
- Improving concentration or checking by staff so that the Railcard discount is applied;
- Encourage a culture among clerks of asking confirmatory questions, for example, the clerk repeating the customer's request, in order to confirm:
 - where the customer wants to travel to; and
 - when the customer wants to return.

9: National TVM Mystery Shopping Survey results

9.1 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.

9.2 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.

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 28th June and 22nd October 2015. 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.

9.3 Sample

The sample, which included a total of 200 TVM transactions, was designed by Line by Line 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 behaviour.

9.3.1 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).

Table 22: Sample by Machine Type

TVM Type	Sample Size
ATOS	72
Scheidt & Bachman (S&B)	128
Total Sample	200

9.4 Scenarios

2015 Scenario's reflected the following ticket types:

Table 23: Sample by Ticket Type

No.	Scenario Description	Sample Size
2	Cheapest	13
3	Most Flexible	187
Total		200

The split by scenario is shown on the following table:

Table 24: Sample by Scenario

Ticket Type	Sample Size
Return Same Day	121
Return 1 Week Later	10
Single	57
Weekly Season	12
Total	200

The following number of Railcard Scenarios was performed:

Table 25: Sample according to Railcard usage

Railcard Scenario	Sample Size
Yes	27
No	173
Total	200

9.5 Weighting

Stratified random sampling was used to ensure the results were representative of actual 2014-15 TVM ticket sale transactions by TOC and TVM type and there were no significant differences between the sample and actuals in terms of proportions. The following results are therefore based on the unweighted data.

10 TVM Transaction Times

10.1 Did you have to Queue to Use the TVM?

Across the total sample, 15% of mystery shoppers had to queue to use the TVM.

As expected, there was a greater chance of queues being experienced during morning Peak hours, although the proportion having to queue between 10am – 5pm was only slightly lower than during the AM Peak period. Mystery shoppers travelling in the evening queued less often than at any other time.

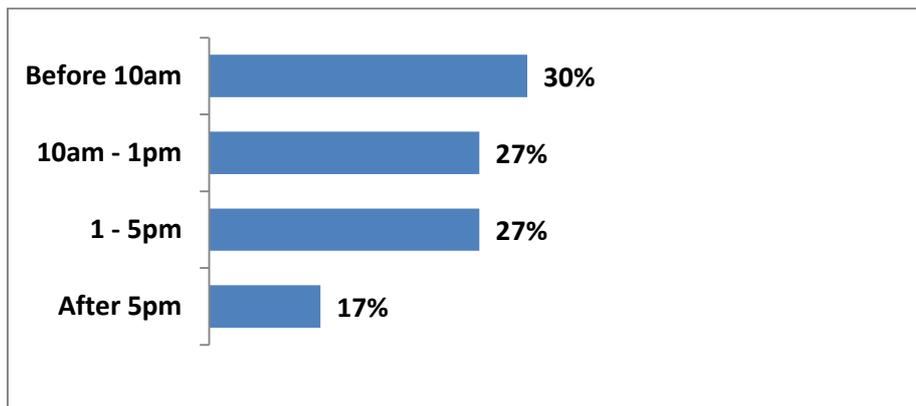


Figure 1 – Queued to Use TVM by Time of Day

In cases where mystery shoppers queued to use the TVM, the majority (57%) 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 7 seconds.

10.2 How Long in Total did your TVM Ticket Purchase Take (Including Queuing)?

The average time taken for a TVM ticket purchase (including any time spent queuing) was 2 minutes and 29 seconds. 15% of mystery shoppers completed their transaction in less than one minute and a further 38% in 1-2 minutes. 9% 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 after 5pm.

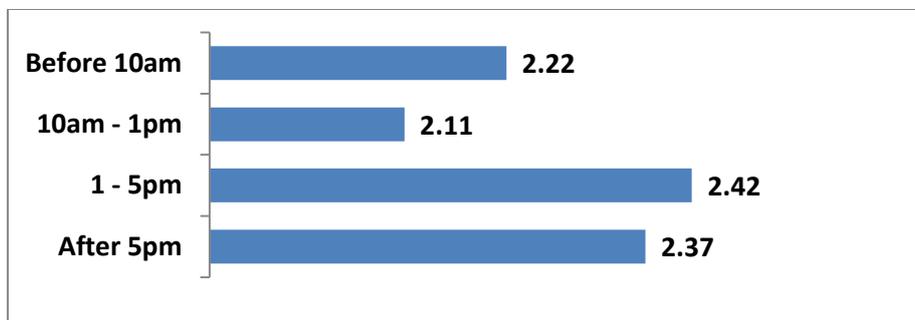


Figure 2 – Total Ticket Purchase Time (Minutes) by Time of Day

10.3 How Long did your TVM Ticket Purchase Take (Excluding Queuing)?

The average time taken for a TVM ticket purchase (excluding any time spent queuing) was 2 minutes and 9 seconds. The average transaction times were shorter for users of the S&B TVM machines.

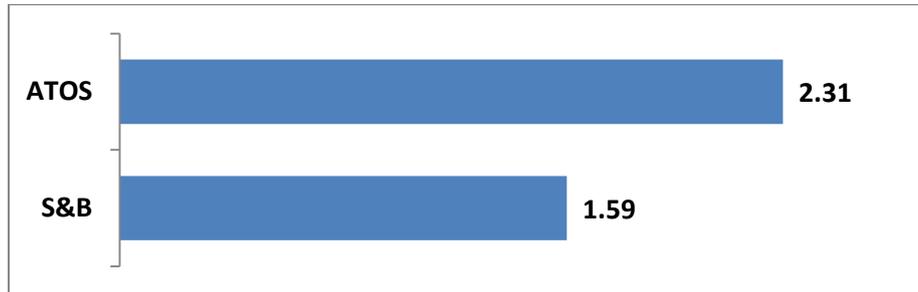


Figure 3 – TVM Transaction Time (Minutes) by TVM Type

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

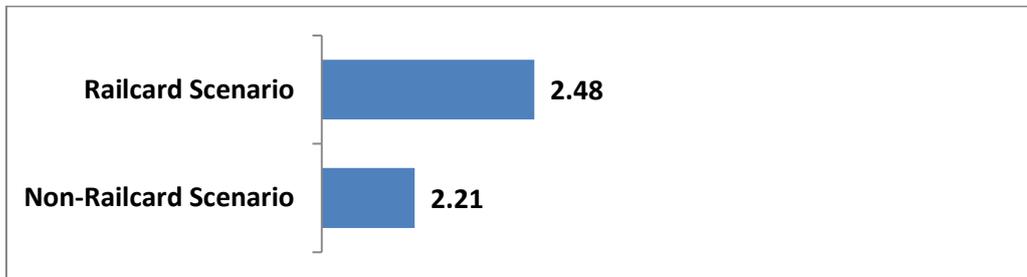


Figure 4 – TVM Transaction Time (Minutes) by Railcard Scenario

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.

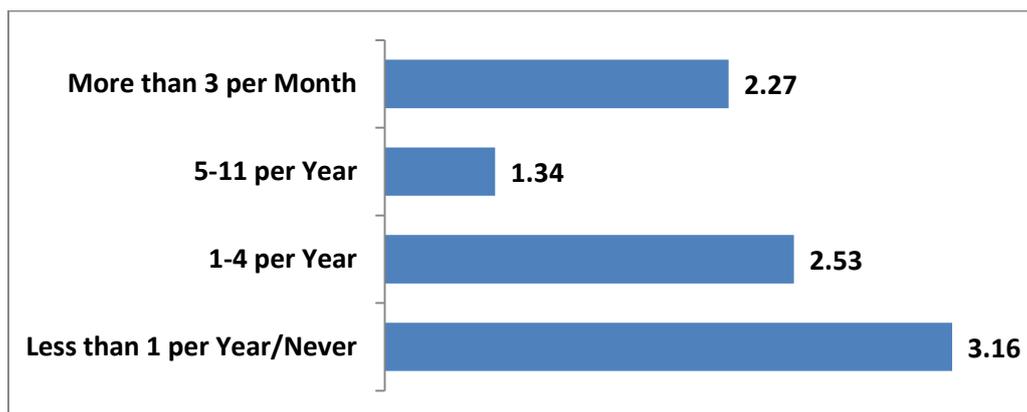


Figure 5 – TVM Transaction Time (Minutes) by Frequency of Buying Tickets from TVMs

10.4 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 5.0. Results for the two TVM types were not significantly different in this regard.



Figure 6 – No. of Transaction Steps by TVM Type

On average, scenarios which included a Railcard component took an extra half step to complete, 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

Although there was no clear correlation between TVM experience and the number of steps taken, shoppers who purchased tickets from TVMs more than three times a month completed their transaction whilst undertaking the fewest number of steps.

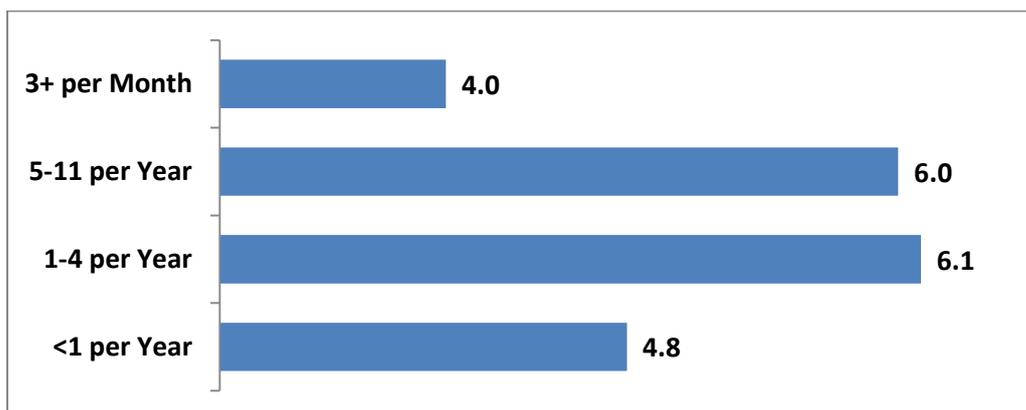


Figure 8 – No. of Transaction Steps by Frequency of Buying Tickets from TVMs

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

There was no significant difference by machine type or experience of user on this measure.

Overall, the average number of times a correction was required was 0.4 per transaction.

On this measure, in 2014 this figure was equally insignificant, albeit marginally higher, at 0.8 per transaction.

11 Satisfaction with TVM Ticket Purchase

11.1 How Easy was it to Find Information about Ticket Types & Conditions?

As in 2014, 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 4% considered it difficult or very difficult to locate the required information in 2015, compared to 9% in 2014 and 7% in 2013.

Shoppers using S&B machines reported higher instances of 'Very Easy' ratings than those using ATOS machines, with 61% of S&B machines rated 'Very Easy' compared to 49% of ATOS machines.

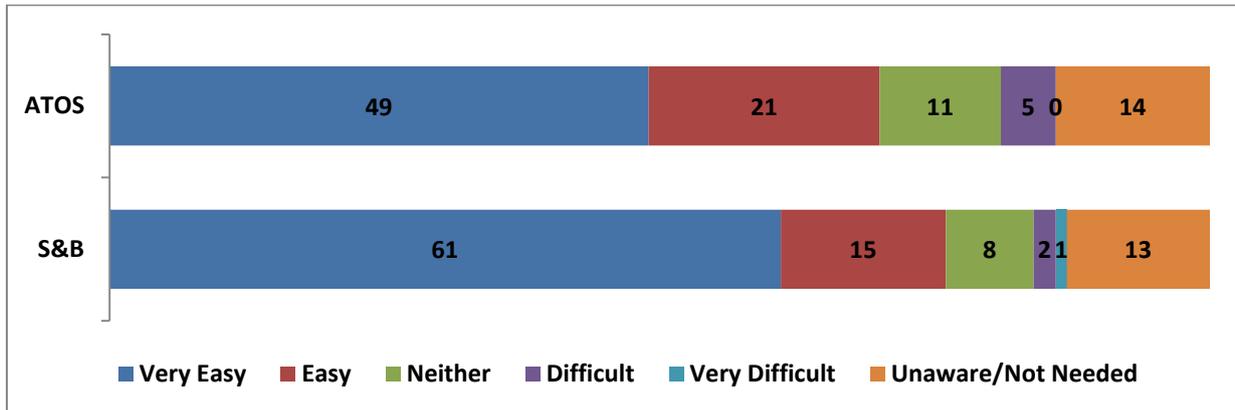


Figure 9 – Ease of Finding Info. on Ticket Types/Conditions by TVM Type

As expected, shoppers purchasing tickets most often, i.e. more than three times a month, found it easiest to locate information on ticket types and conditions.

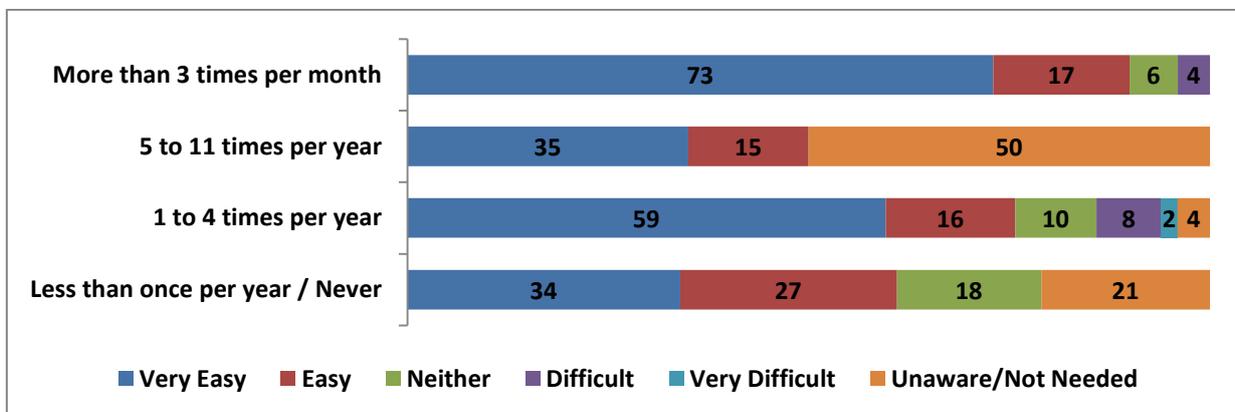


Figure 10 – Ease of Finding Info. on Ticket Types/Conditions by TVM Experience

Shoppers who were able to complete their transaction quickest, also reported higher ease of use ratings. Just over 60% of shoppers who completed their purchase in less than three minutes rated the ease of finding information on ticket types and conditions as 'Very Easy' compared to 47% of those taking between 3 to 5 minutes, and 44% of those taking over 5 minutes.

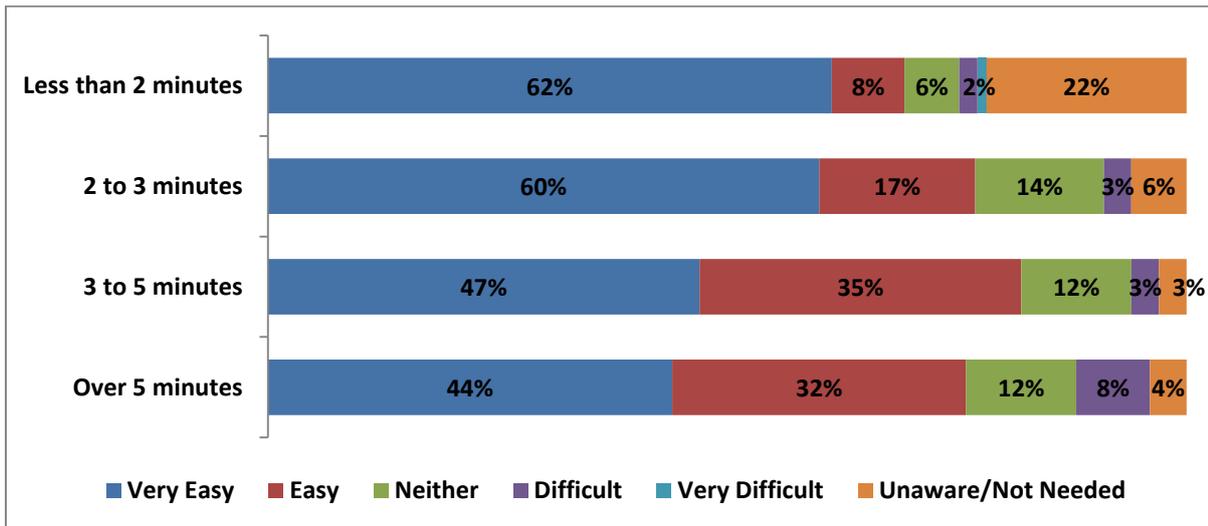


Figure 11 – Ease of Finding Info. on Ticket Types/Conditions by Total Purchase Time

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

As in 2014, the majority of TVM mystery shoppers were satisfied with the information available on the machine about ticket types and conditions, with just 4% claiming to be either 'Very Dissatisfied' or 'Dissatisfied' this year (10% in 2014).

S&B users reported higher ratings of 'Very Easy' but both S&B and ATOS had similar proportions of shoppers claiming to be dissatisfied.

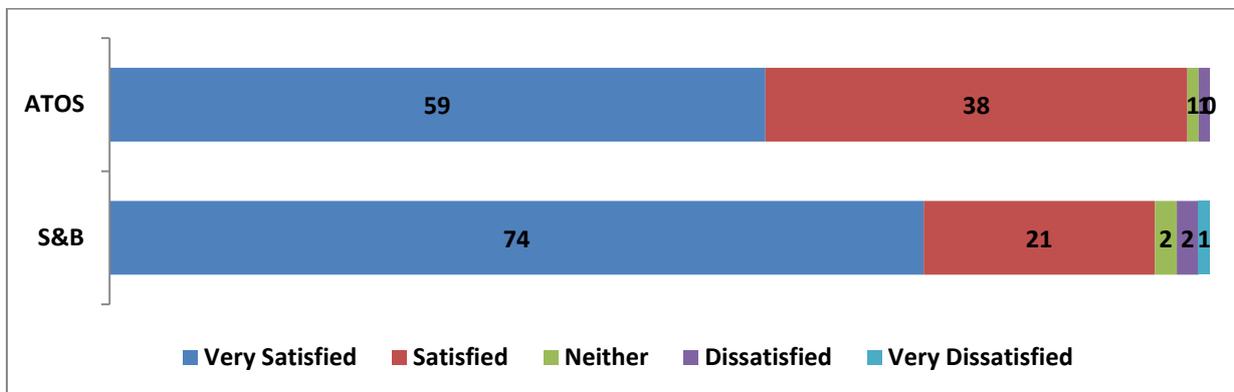


Figure 12 – Satisfaction with Info. on Ticket Types & Conditions by TVM Type

Those not satisfied with the information provided tended to comment that there was a lack of detail, particularly on aspects such as the difference between Peak and Off-Peak Tickets and valid / applicable routes of travel.

11.3 How Satisfied Were You with the Clarity of Instructions for using the TVM?

Just 2% of mystery shoppers expressed dissatisfaction with this aspect of their TVM purchase experience (4% in 2014).

Satisfaction levels were high amongst users of both machine types.

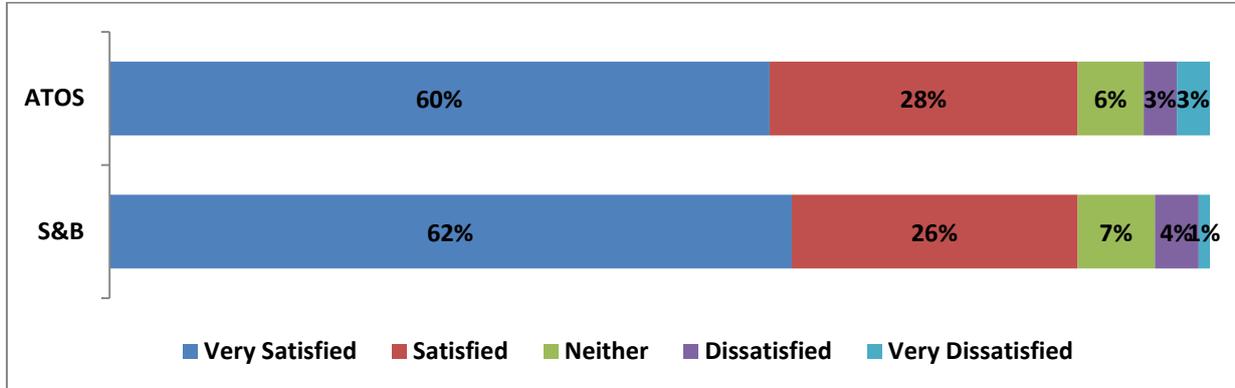


Figure 13 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by TVM Type

Unsurprisingly, those whose purchase times were shorter expressed the greater satisfaction with the clarity of instructions, with 95% of those completing their transaction in less than 2 minutes rating clarity of instructions as either 'Very Easy' or 'Easy'.

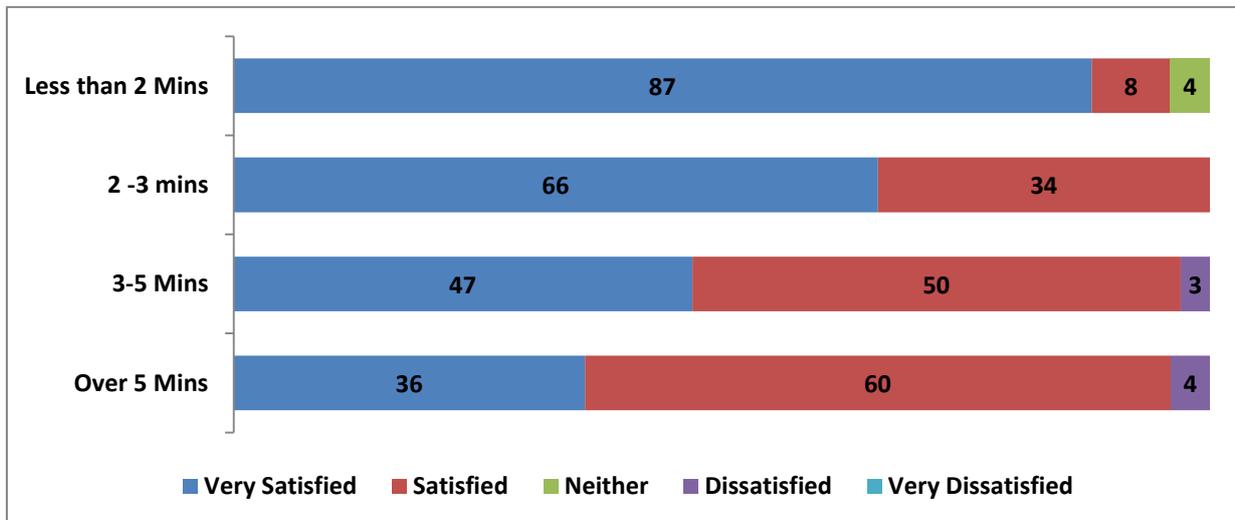


Figure 14 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by Total Purchase Time

Shoppers uniformly found clarity of instructions to be either 'Very Easy' or 'Easy', regardless of experience in purchasing tickets from TVM machines. However, those purchasing more than 11 times a year were more likely to provide the highest rating of 'Very Easy'.

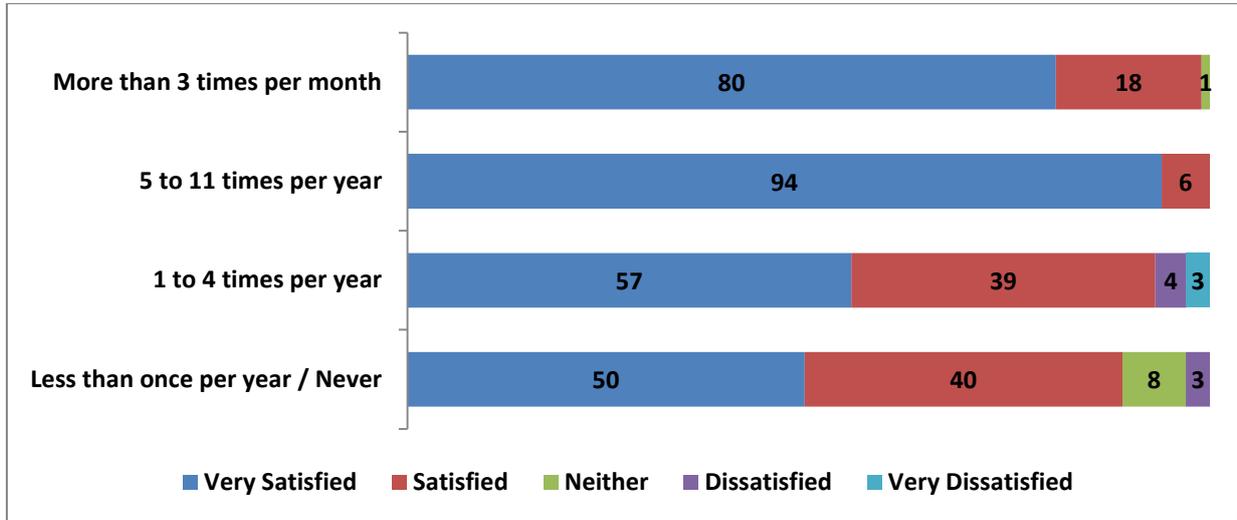


Figure 15 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by TVM Experience

11.4 The Ticket Purchased

11.4.1 Were You Able to Purchase a Ticket?

Overall, 97% of shoppers were able to successfully complete a ticket purchase.

11.4.2 How Confident Were You That You Got the Correct Ticket?

Only 3% of mystery shoppers who were able to purchase a ticket expressed a lack of confidence in having obtained the correct ticket for their journey. Overall confidence has increased significantly in the current year, with 76% of shoppers being 'Very Confident' and a further 17% who claimed to be 'Fairly Confident' that their ticket was correct, as compared to 65% and 16% respectively in 2014.

ATOS users generally reported a higher degree of confidence.

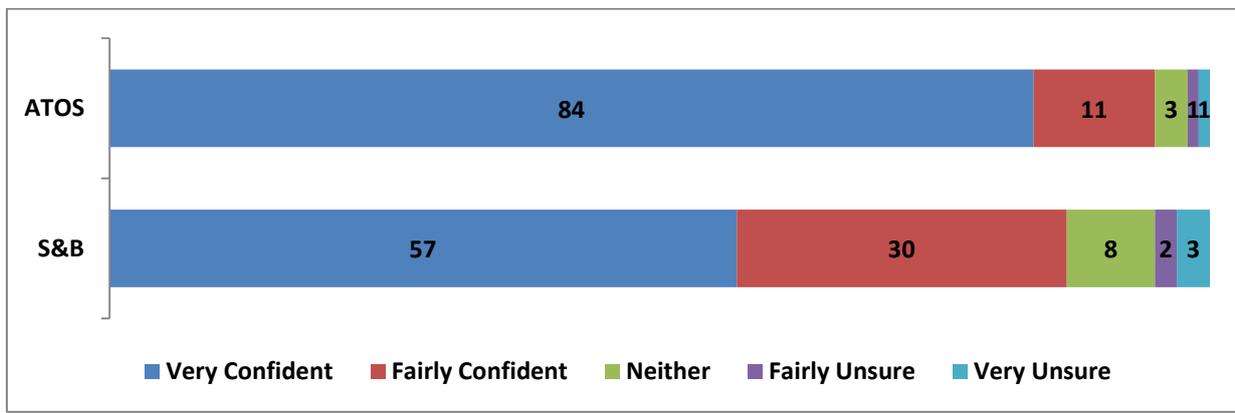


Figure 16 – Confidence in Getting the Correct Ticket by TVM Type

As the chart below 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.

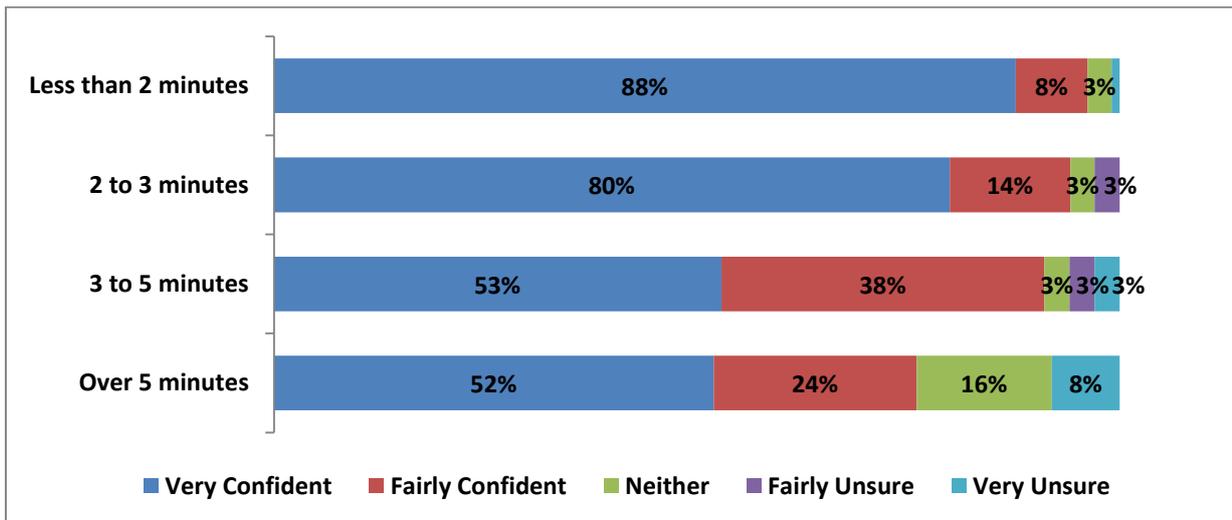


Figure 17 – Confidence in Getting the Correct Ticket by Total Purchase Time

11.4.3 Was the Correct Ticket Purchased?

Overall, when marked as correct or not versus the scenario requirements and specific journey details, 97% of all tickets were deemed to be correct, which aligns with the aforementioned confidence rating.

There was very little difference in the rate of correct purchases by machine type, with users of S&B machines being marginally more likely to purchase the correct ticket.



Figure 18 – Correct Ticket Purchased by TVM Type

Unsurprisingly, those who purchased tickets less frequently had a lower rate of correct purchases versus those who purchased from TVM machines more frequently. 11% of shoppers who purchased tickets from TVM machines less than once a year ended up purchasing the incorrect ticket, compared to just 1% for frequent buyers.

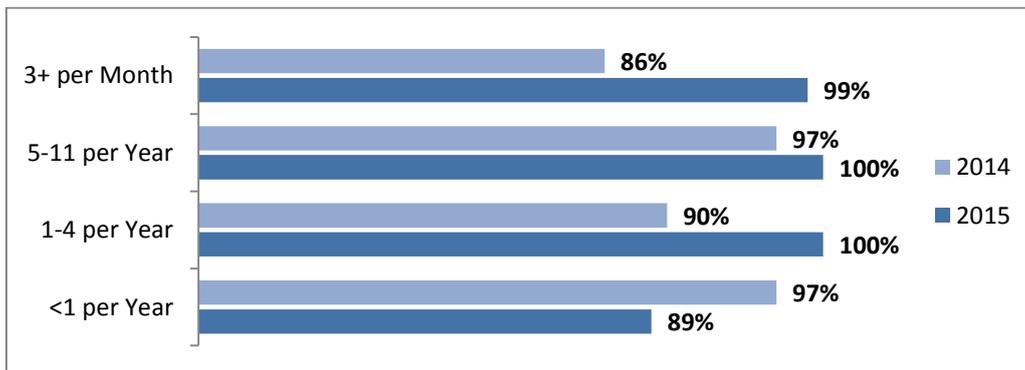


Figure 19 – Correct Ticket Purchased by Frequency of Buying Tickets from TVMs

Shoppers who took the longest amount of time to complete their transaction also reported more incorrect purchases. Shoppers taking longer than five minutes to buy their ticket had a pass rate of 87% (rate of correct tickets purchased), versus 100% for those that completed their transaction in less than two minutes.



Figure 20 – Correct Ticket Purchased by Total Purchase Time

Shoppers' (self-ratings of) confidence in having purchased the correct ticket was not found to be a reliable indicator of ticket-purchase accuracy. The 3% of shoppers that obtained an incorrect ticket had actually rated themselves as being either 'Fairly' or 'Very Confident' in having purchased the correct ticket. As per Figures 18, and 19, accuracy seems to be linked more to experience in having purchased from TVM machines and the length of transaction time.

12 Terminology and Suggested Improvements

12.1 Was there any Terminology you did not understand?

As in 2014, almost all shoppers found the terminology on-screen to be clear and easy to understand. Of the 5% of shoppers that cited terminology that they did not understand (4% in 2014), the common areas where shoppers encountered terminology issues were:

- Off-Peak times
- Flexibility information
- Day Return Tickets
- London Terminals

12.2 What was the one main improvement that would make the TVM machine more user friendly?

Two thirds of shoppers were able to suggest an improvement that they felt would positively impact user-friendliness of the TVM machines.

The majority of comments referred to specific, isolated experiences with the TVM machine that the shopper felt could be improved upon. However, there were some re-occurring themes, with no significant difference in suggestions between ATOS and S&B machine types.

The following key themes emerged:

- More information on Ticket Types
- Speed and Sensitivity could be bettered
- Contactless Payments should be applicable

13 National Online Mystery Shopping Survey results

13.1 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.

13.2 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.

As in the TVM survey, 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 11th June and 23rd October, 2015.

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 236.

13.3 Sample

The sample, which included a total of 236 online transactions, was designed by Line by Line with the objective of providing a sample of Purchase Scenarios that reflects the mix of actual online ticket purchases by the general public.

13.4 Websites

The sample of TOC retailers is shown overleaf.

Table 26: Sample by retailer website

Website	Sample Size
www.chilternrailways.co.uk	35
www.firstgreatwestern.co.uk	22
www.greateranglia.co.uk	4
www.londonmidland.com	15
www.southeasternrailway.co.uk	4
www.southernrailway.com	14
www.southwesttrains.co.uk	7
www.thameslinkrailway.com	4
London and South East Operators	105
www.crosscountrytrains.co.uk	17
www.eastmidlandstrains.co.uk	7
www.tpexpress.co.uk	45
www.virgintrains.co.uk	5
www.virgintrainseastcoast.com	18
Long Distance Operators	92
www.arrivatrainswales.co.uk	9
www.grandcentralrail.com	4
www.hulltrains.co.uk	15
www.northernrail.org	8
www.scotrail.co.uk	3
Regional operators*	39
Total TOCs / Sample	236

*Regional operators form a small base in the sample. Subsequently, charts that depict differences by retailer categories do not show a separate bar for this group of operators. However, Regional Operator results are included within the aggregated 'Total TOCs' bar.

13.5 Scenarios

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

Table 27: Sample by scenario

No.	Scenario Description	Sample Size
1	Cheapest ticket, 2 weeks ahead	22
2	Cheapest ticket, return same day	34
3	Cheapest ticket, single	30
4	Cheapest ticket, return 1 week later	27
5	First Class	31
6	Senior Railcard	29
7	Travelling with children	35
8	16-25 Railcard	28
Total		236

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

Table 28: Sample by collection method

Ticket Delivery/Collection Method	Sample Size
Collection from TVM/Ticket Office	178
Delivered by post	56
Download to print at home	2
Total	236

13.6 Weighting

Weighting was applied to the survey data to ensure the results were representative of actual 2015-16 patterns in respect of online ticket sale transactions by website and ticket type (Scenario). The following results are based on this weighted survey data.

14 Length of Transaction

14.1 How Long in Total Did Your Ticket Purchase Take?

As in 2014, the average time taken for an online ticket purchase was just under 10 minutes. Just under a quarter (24%) of mystery shoppers took less than 5 minutes to complete their purchase, whereas 21% took over 15 minutes.

In 2014, shoppers purchasing from websites of Long Distance Operators reported the longest transaction times. In 2015, those purchasing via websites of Long Distance Operators actually had the shortest transactions times, with an average transaction time of 9.1 minutes versus 9.7 minutes for London and South East Operators.

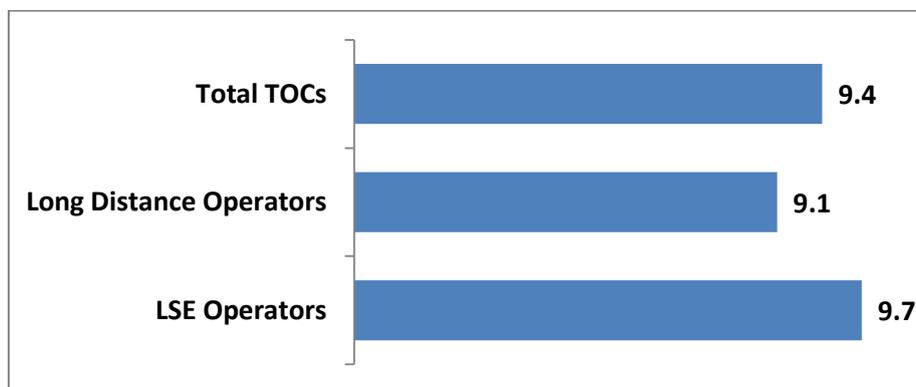


Figure 21 – Transaction Time by Retailer Category (Minutes)

Perhaps surprisingly, transactions involving the purchase of tickets with a 'Same Day Return' took the longest to complete, with 'Senior Railcard' and 'Return in One Week' tickets having the next longest transactions. As expected, 'Single' Ticket purchases had the shortest transaction times.

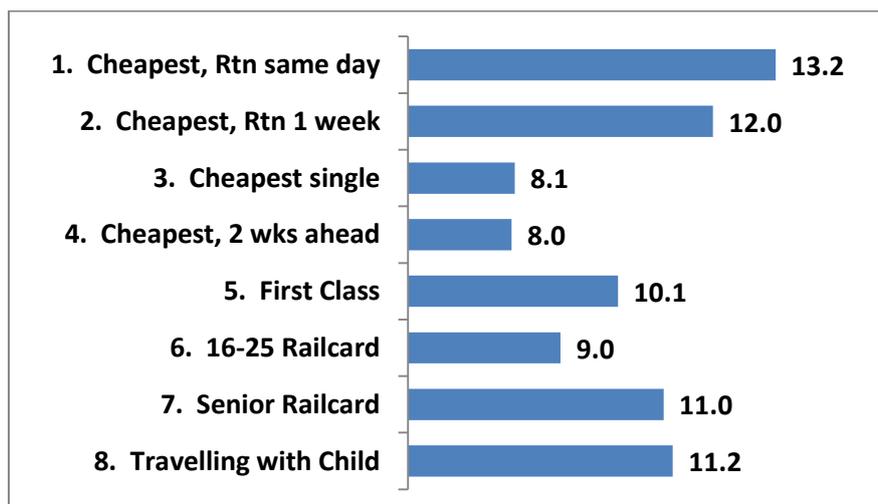


Figure 22 – Transaction Time by Scenario (Minutes)

The most inexperienced rail website users take more than twice as long to complete their transaction as those who are most experienced, i.e. shoppers who buy rail tickets online weekly.

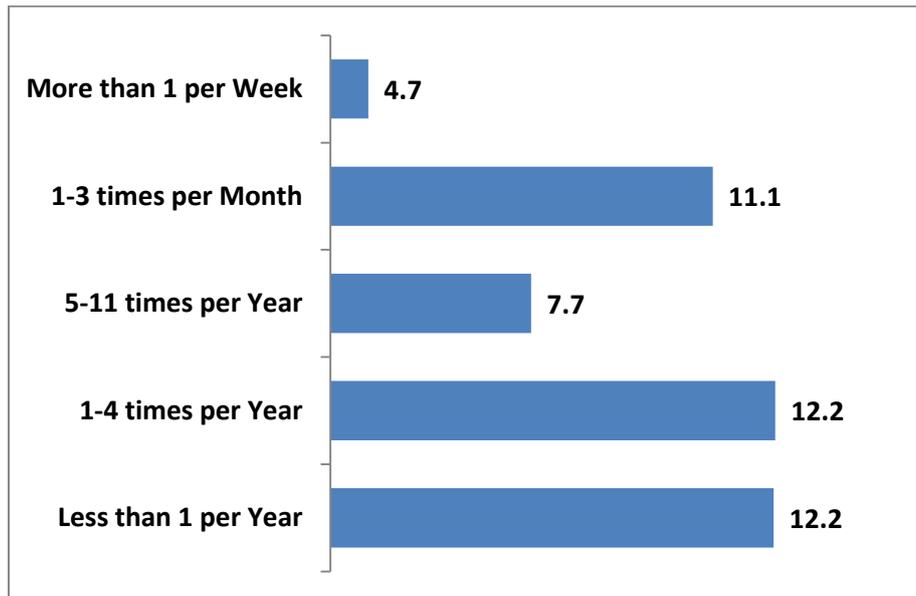


Figure 23 – Transaction Time by Frequency of Buying Rail Tickets Online (Minutes)

14.2 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 6.8 (mirroring the result in 2014). There were no significant differences by retailer category.

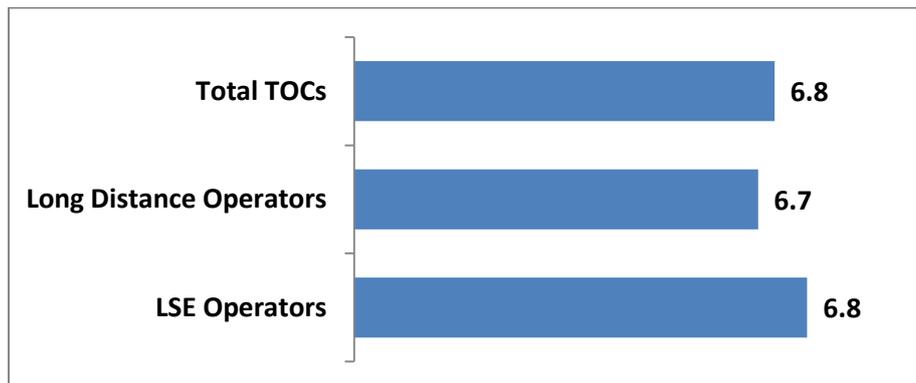


Figure 24 – No. of Page Views by Retailer Category

The table overleaf shows, as in 2014, that Scenarios 8 ('Travelling with Children') and 5 ('First Class ticket') appear to be the most complex online transactions, requiring around 7.5 page views on average verses 6.5 - 7 for other ticket types.

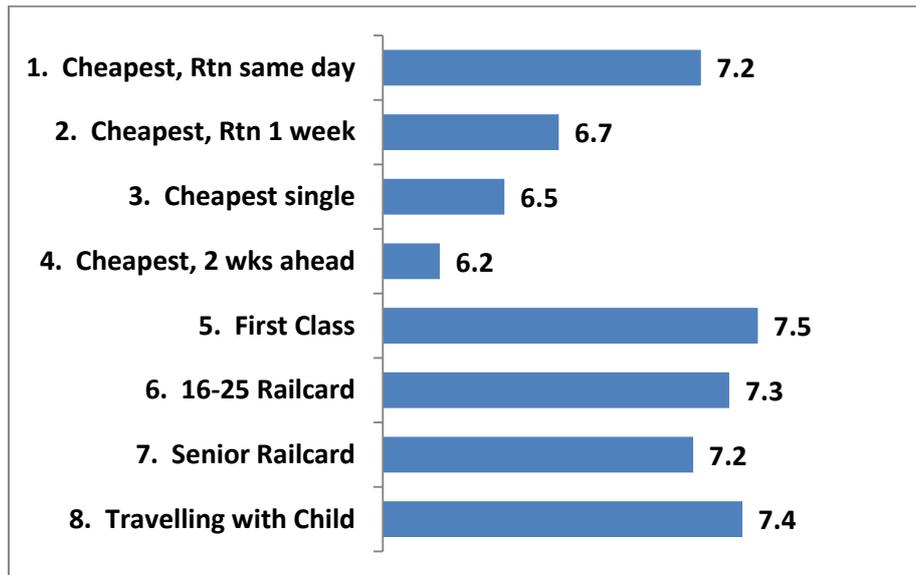


Figure 25 – No. of Page Views by Scenario

There is a correlation between the number of page viewed by shoppers and their experience of purchasing rail tickets online. Those with most experience, i.e. those purchasing rail tickets online more than once a week, were able to purchase in fewer steps, an average of 5 steps verses 7 steps for the sample as a whole.

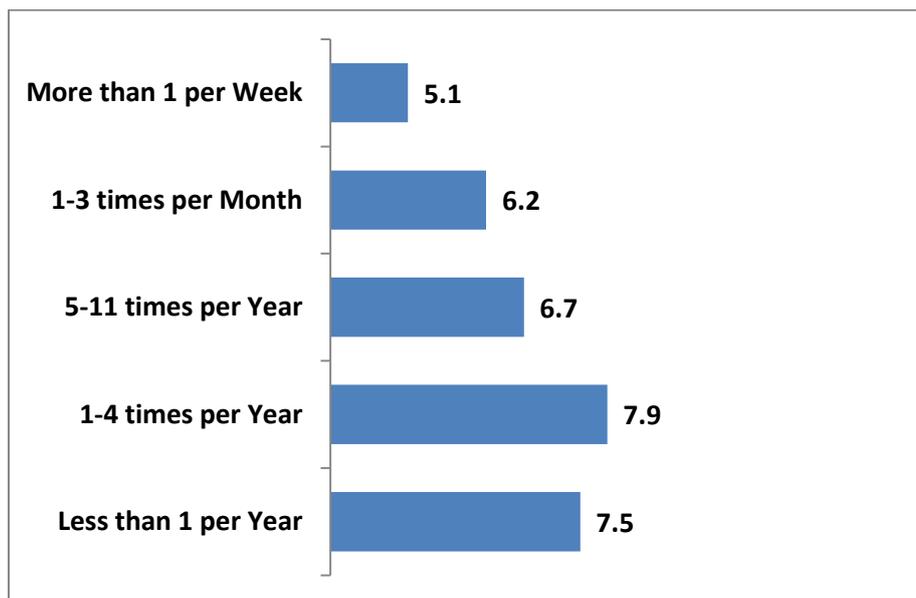


Figure 26 – No. of Page Views by Frequency of Buying Rail Tickets Online

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

Instances of shoppers having to go back a web page or correct an entry were very rare, with the average number of reverting steps being less than 1 (0.5). This mirrored the overall 2014 result.

However, there was correlation between shoppers' experience of buying tickets online and the number of pages being returned to, with shoppers purchasing tickets more than 3 times a month having an average of 0.2 "Go Backs"/ corrections compared to 0.6 for less frequent buyers.

In terms of Scenario, shoppers buying 'Return Same Day' tickets had a higher average number of "go backs" / corrections (0.8) vs the sample total.

15 Satisfaction with Online Ticket Purchase

15.1 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. Consistent with the results from 2014, only 5% of shoppers considered it either 'Difficult' or 'Very Difficult' to find information related to ticket types and conditions. There were no significant differences by retailer category, with 80% of shoppers finding it either 'Easy' or 'Very Easy' to locate information about ticket types and conditions in both cases.

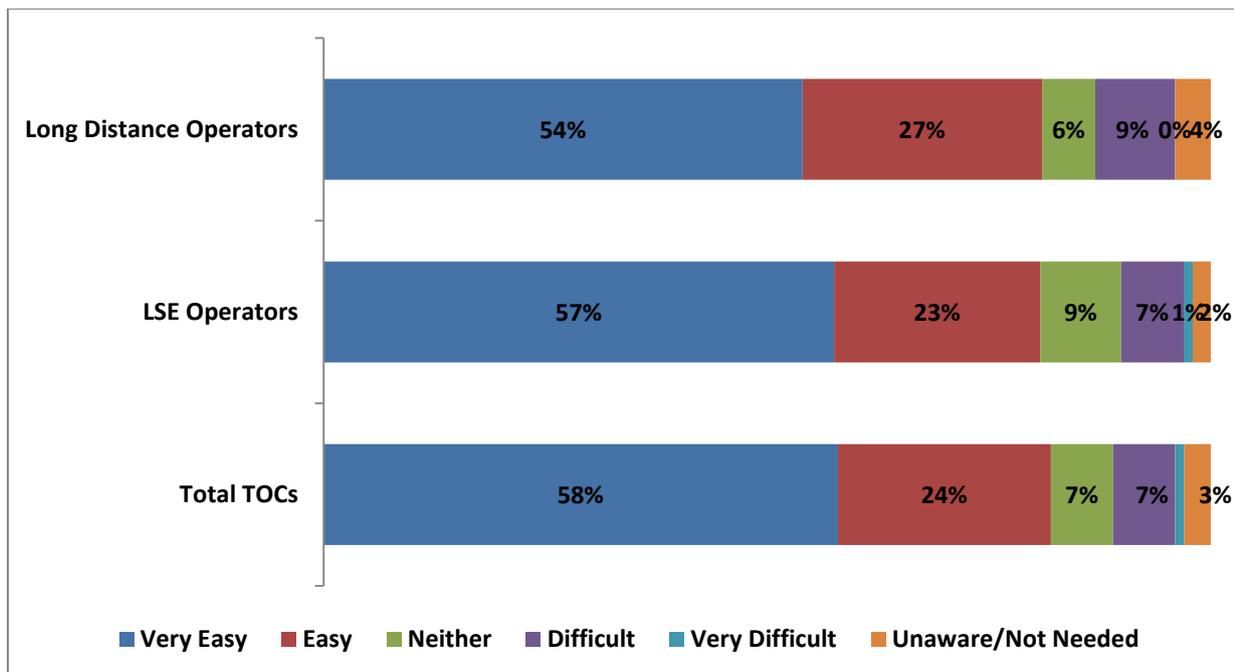


Figure 27 – Ease of Finding Info. On Ticket Types/Conditions by Retailer Category

Those least experienced at purchasing rail tickets online were less likely to rate 'Easy' or 'Very Easy' on this measure, 77% rating the ability to find information about ticket types and conditions as either 'Easy' or 'Very Easy' versus 90% for those purchasing weekly tickets.

15.2 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 7% of the sample claimed to be dissatisfied (3% in 2014).

London and South East operators (88%) had marginally fewer shoppers rating their websites as either 'Easy' or 'Very Easy' compared to London Distance Operators (94%).

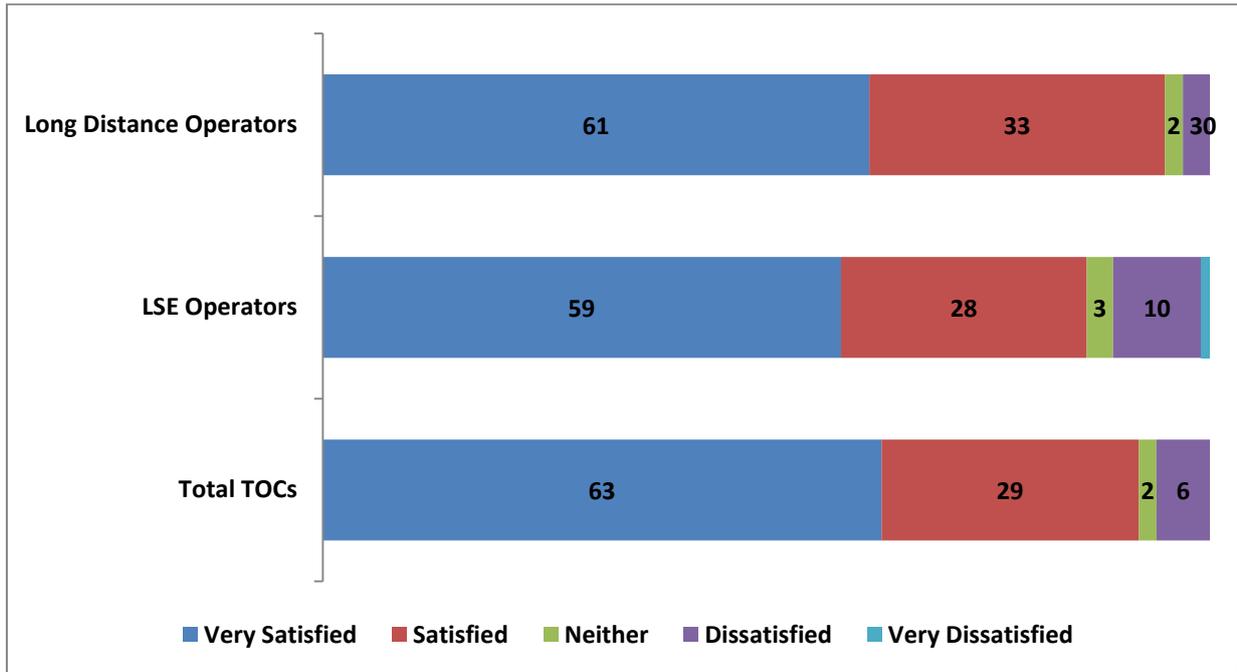


Figure 28 – Satisfaction with Info. on Ticket Types/Conditions by Retailer Category

Shoppers conducting Scenarios 1 and 2 had fewer ratings of either 'Satisfied' or 'Very Satisfied', with an average of 85% of these shoppers being satisfied compared to 90% or above for all other scenarios.

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:

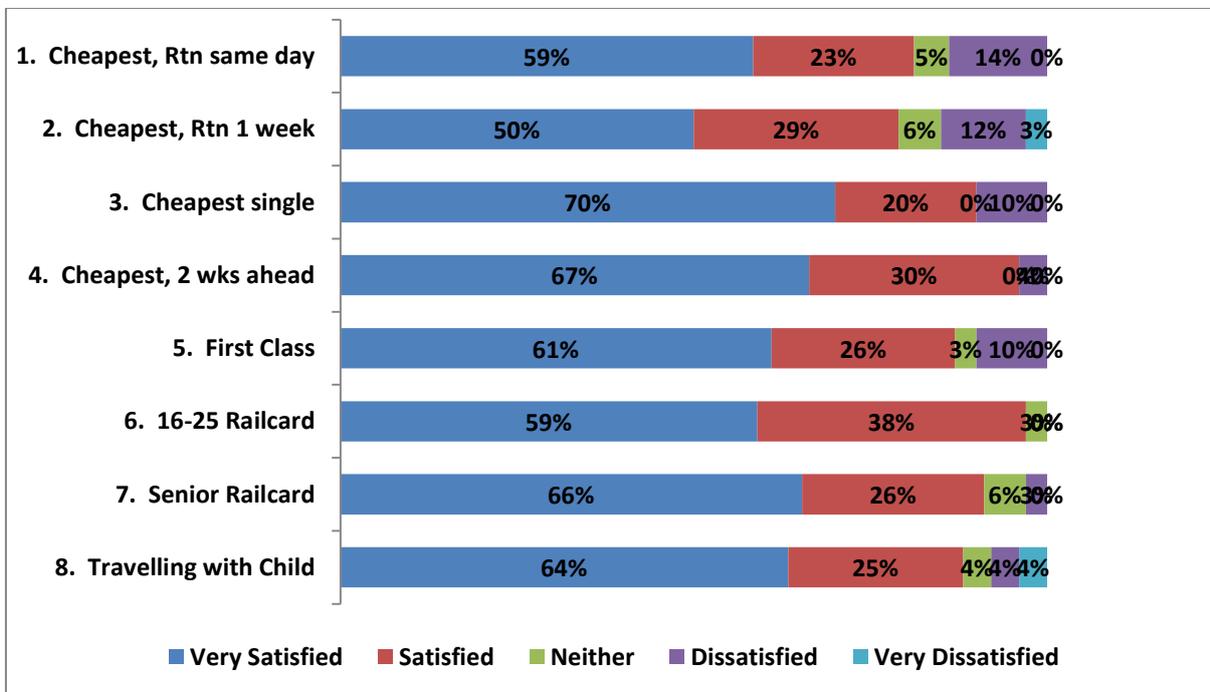


Figure 29 – Satisfaction with Info. on Ticket Types/Conditions by Scenario

Those who were not satisfied with the information provided largely commented on the following:-

- Lack of information to help a shopper distinguish different ticket types
- Having to open a pop up box for ticket condition information rather than seeing all the information on one screen.

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

As in 2014, just 1% of online shoppers expressed dissatisfaction with this aspect of their online purchase experience.

There were no significant differences between retailer categories.

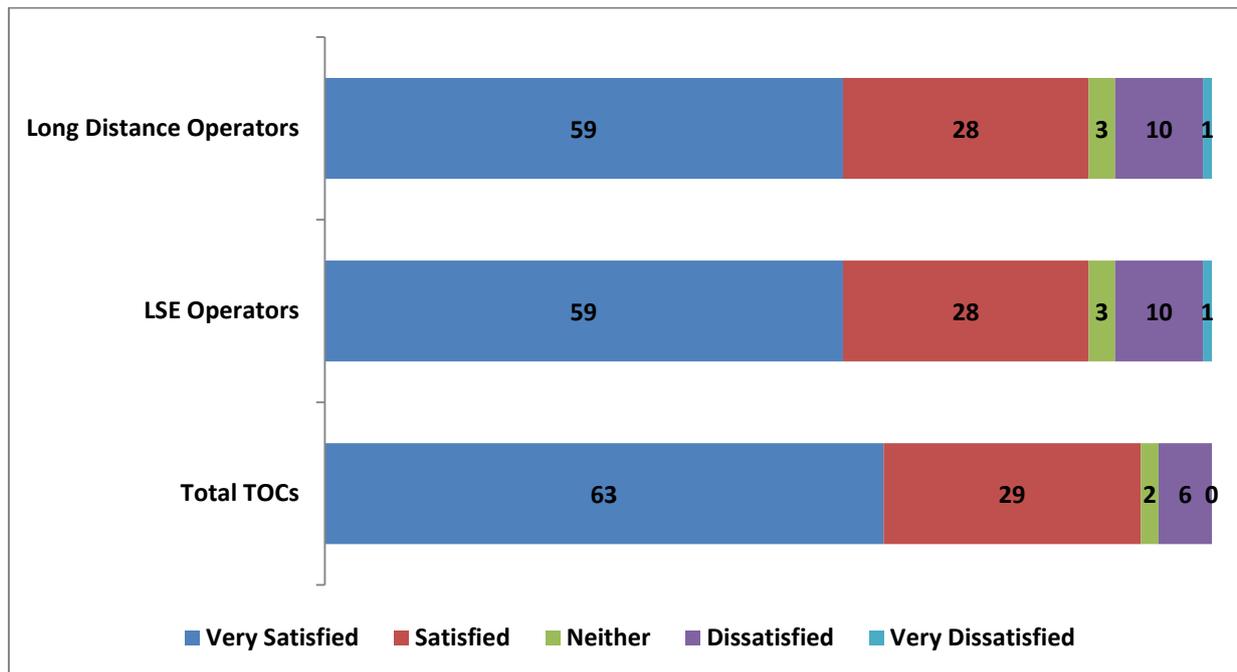


Figure 30 – Satisfaction with Clarity of Instructions by Retailer Category

Comments from those not satisfied with the clarity of instructions predominantly fell under the following two themes:-

- Layout not clear
- E-ticket accessibility

16 The Ticket Purchased

16.1 Were You Able to Purchase a Ticket?

Out of the total sample (236 online mystery shops), there were only two cases where the shopper was unable to successfully complete a ticket purchase. This was due to two shoppers encountering a technical issue on the payment screen when purchasing from Virgintrains.com.

16.2 How Confident Were You That You Got the Correct Ticket?

Just 3% (4% in 2014) of mystery shoppers explicitly expressed a lack of confidence by stating they felt 'Fairly Unsure' or 'Very Unsure' in having obtained the correct ticket for their journey with 64% being 'Very Confident' and a further 31% feeling "Fairly Confident" that their ticket was correct.

There were no significant differences in shopper confidence ratings by ticket retailer category.

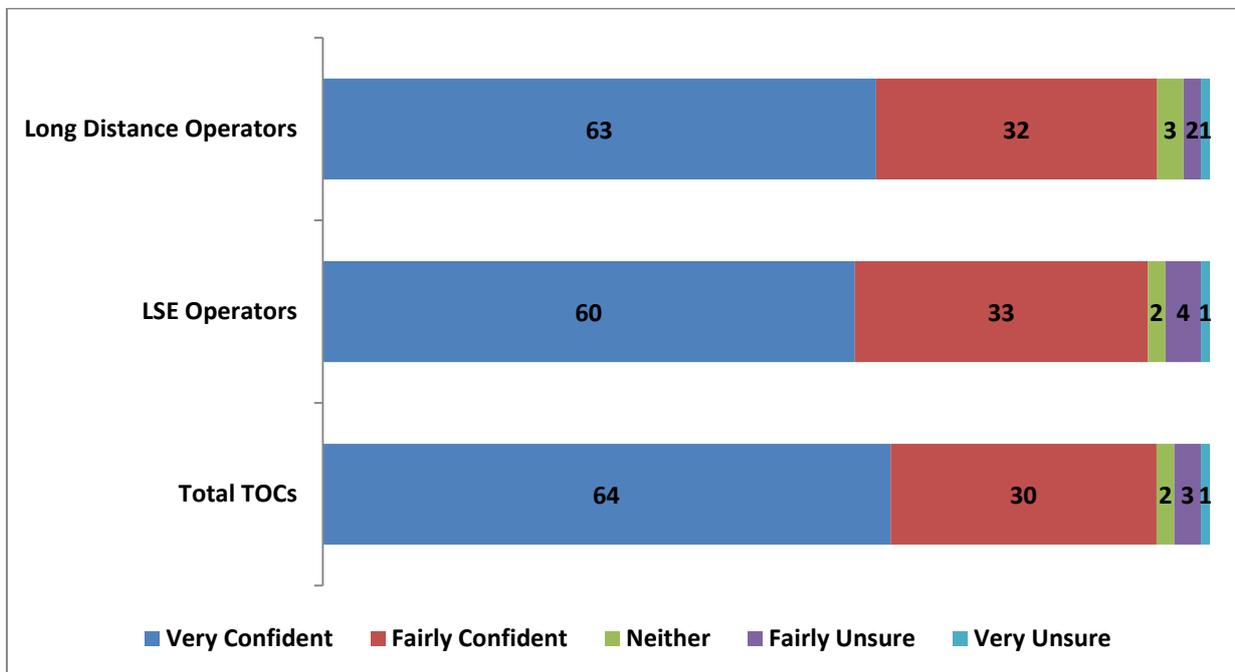


Figure 31 – Confidence in Getting the Correct Ticket by Retailer Category

Confidence ratings were high regardless of scenario, with 90% or more of shoppers, in each case, having rated themselves as being either 'Confident' or 'Very Confident' they had obtained the correct ticket. Almost all shoppers purchasing 'Single' or 'Advance' tickets were confident in their purchase.

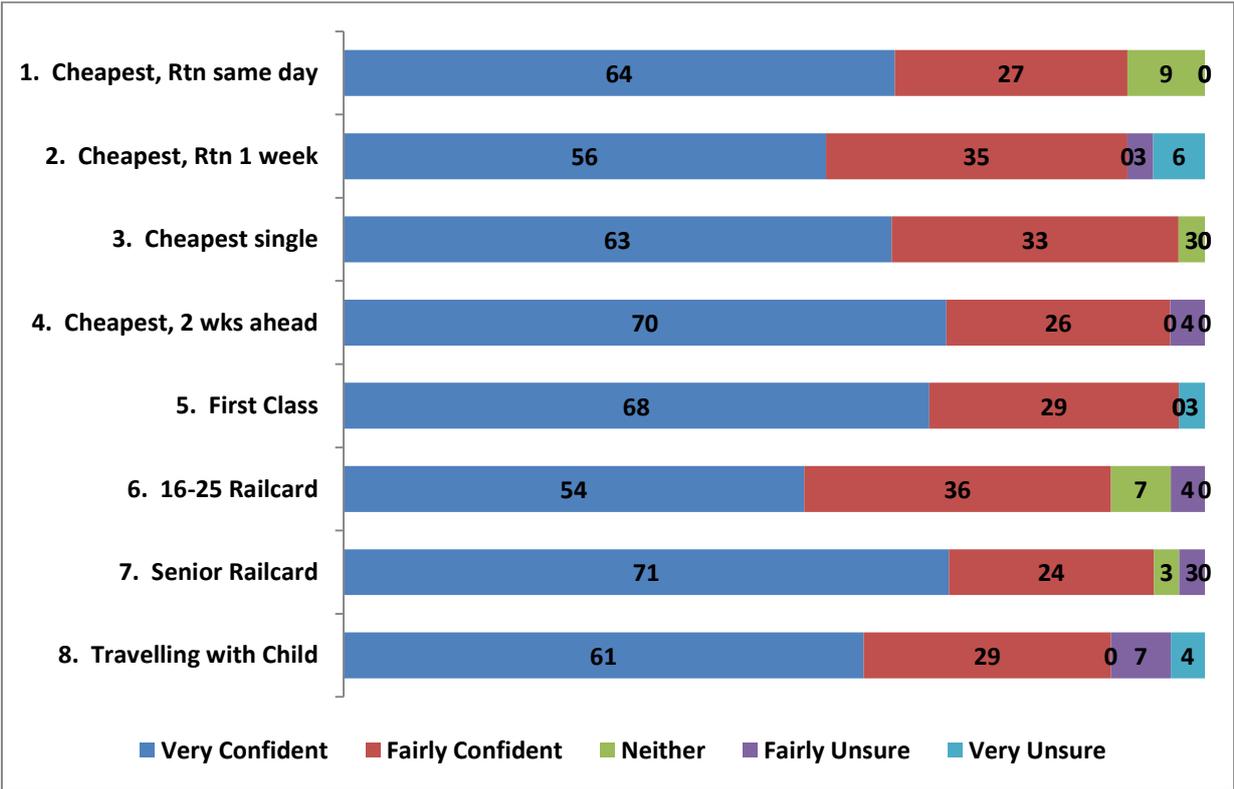


Figure 32 – Confidence in Getting the Correct Ticket by Scenario

As is to be expected, the group of shoppers with the least experience in purchasing rail tickets online had the lowest average confidence levels; 45% (an improvement on 28% in 2014) of this group were 'Very Confident', versus 64% for the overall sample.

17 Was the Correct Ticket Purchased?

Overall, when marked as correct or not verses the scenarios requirements and specific journey details, 95% of all tickets were deemed to be correct (94% in 2014).

In the 2014 study, shoppers purchasing from London & South East operator websites were less successful in obtaining the correct ticket, having a pass rate of 75% versus 94% for the sample as a whole. In 2015 however, pass rates are uniformly high and London & South East achieved 94% accuracy.

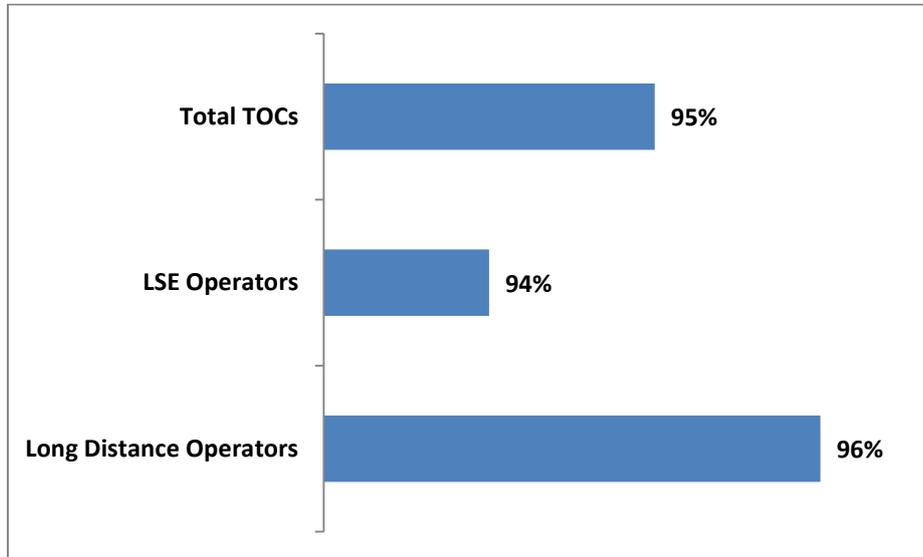


Figure 33 – Correct Ticket Purchased by Retailer Category

'Single', 'First Class' and, surprisingly, 'Travelling with Children' / 'Family Railcard' tickets purchase scenarios all obtained 100% accuracy. The pass rate was uniformly high, with the minimum being 91% (for 'Cheapest Return in One Week').

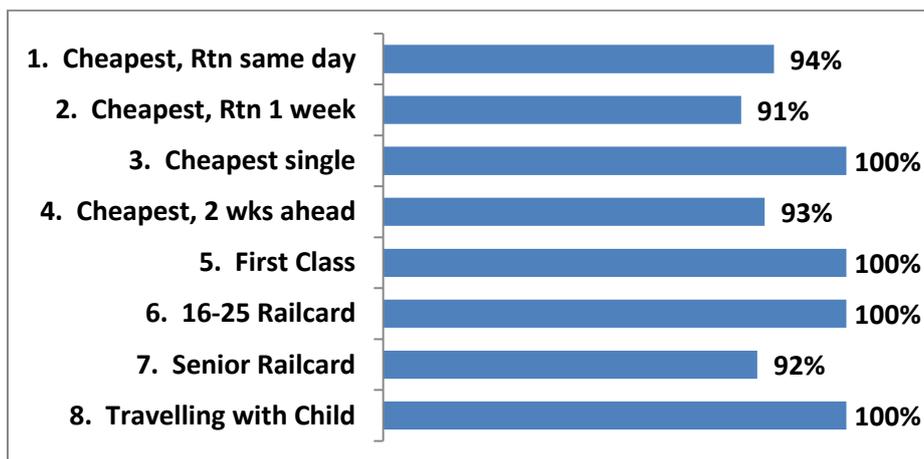


Figure 34 – Correct Ticket Purchased by Scenario

Online shopping experience in general was not seen to influence a successful outcome.

18 Opinions of the Websites

18.1 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 and 2014, the highest satisfaction levels were expressed with the Speed and Security of the ticketing websites.

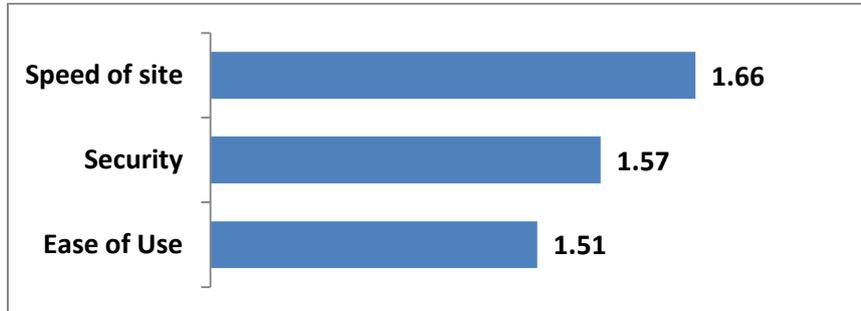


Figure 35 – Satisfaction with Aspects of the Website (Mean Score) – Total Sample

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

London & South East Operators had slightly fewer shoppers being satisfied with 'Ease of Use' compared to Long Distance Operators, with 85% being 'Satisfied' or 'Very Satisfied' with ease of use, compared to 91% for the sample as a whole. However, ratings for Security and Speed were uniformly high across retailer categories.

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.

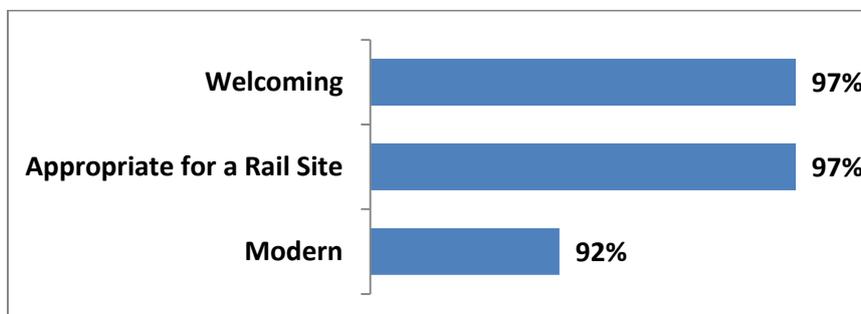


Figure 36 – Satisfaction with Aspects of the Website Appearance – Total Sample

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

In terms of the overall likelihood to recommend the website, average scores by retailer categories have dipped in 2015, with the retailer categories achieving a score between 7 and 8 (reflecting similar findings to the 2013 study), as opposed to 8 and 9 in 2014.

As in 2014, Long Distance Operators have achieved significantly higher scores, with an average recommendation score of 8.9 versus 8.3 for London and South East Operators.

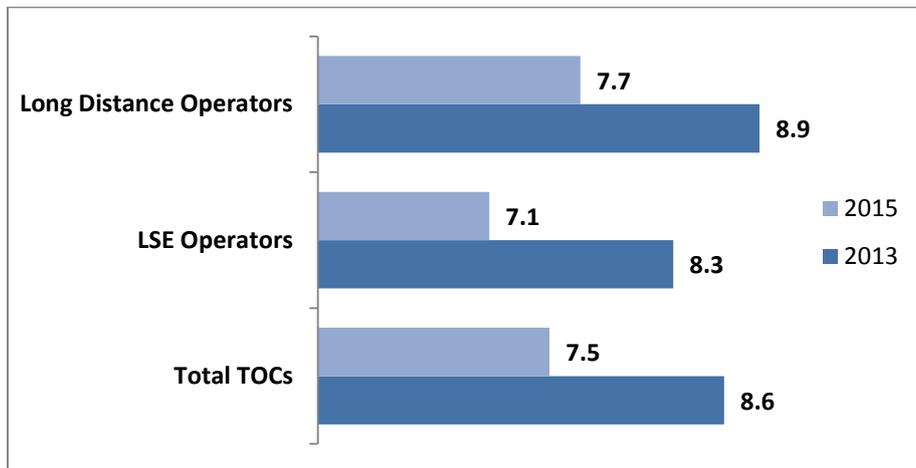


Figure 37 – Likelihood of Recommending Website (Mean Score) – By Retailer Category

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

Those most likely to recommend the rail ticketing websites were those conducting 'Standard Day Return' (Scenario 1). 'Return in one Week' ticket purchases had the lowest recommendation mean score.

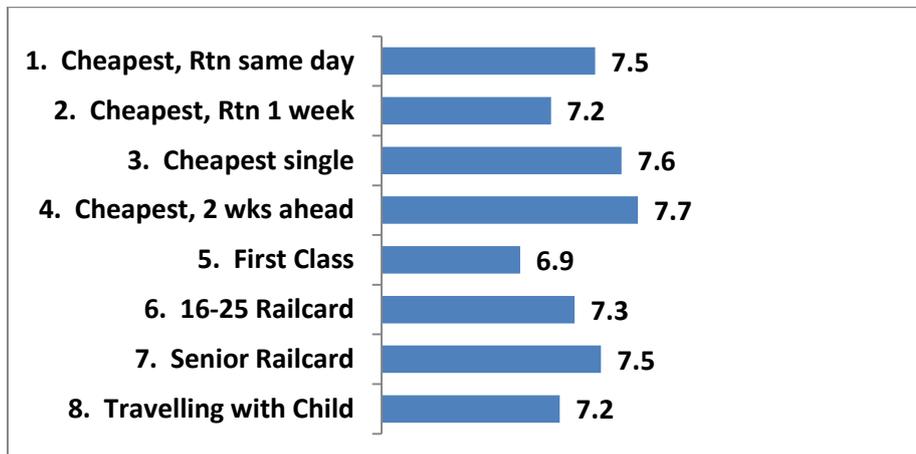


Figure 38 – Likelihood of Recommending Website (Mean Score) – by Scenario

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

20 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 42% said the website was about the same as others. Only 10% gave a negative answer versus 8% in 2014 and 14% in 2013 (commenting that the site was “worse than some”, “worse than most” or “the worst”).

Long Distance Operators achieved a significantly higher rating in this regard:

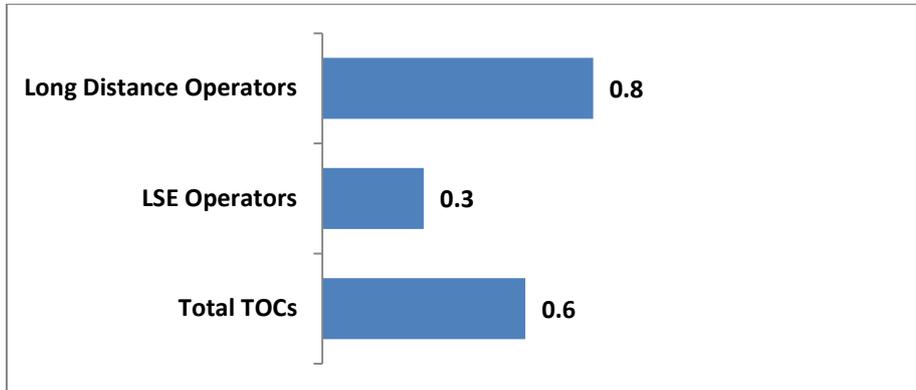


Figure 39 – How Website Compares with Others (Mean Score) by Retailer Category

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 favorably to others were those conducting Scenario 1, ‘Standard Day Return ticket’ and Scenario 6 ‘16-25 Railcard ticket’.

As the chart below illustrates, the group of mystery shoppers who shop online most often were less enthusiastic about the rail websites. A similar trend was seen for those who specifically shopped for rail tickets online most often.

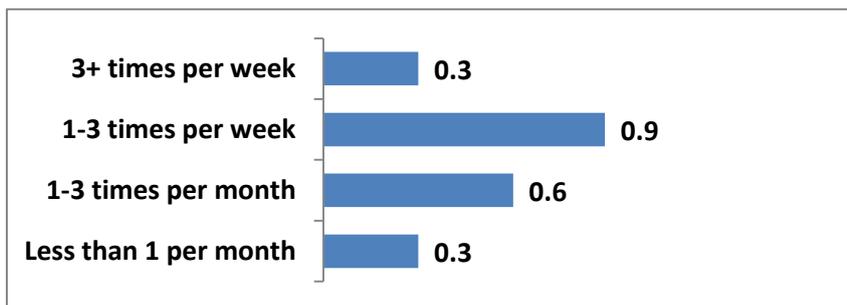


Figure 40 – How Website Compares with Others (Mean Score) by Frequency of Shopping Online

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

21 Receipt of Tickets

21.1 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.

22 How Many Days Did it Take for Your Ticket to Arrive by Post?

In all instances in which tickets were delivered to the mystery shopper at home, delivery took place in one or two days; which was found to be in line with shopper's expectations.

23 Terminology and Suggested Improvements

23.1 Was there any terminology you did not understand?

Almost all shoppers were happy that they understood all the terminology on the website they used; with just 4% of shoppers citing terminology they did not understand.

23.2 What was the main improvement that would make ticket buying on the website more user friendly

Almost two thirds (63%) of shoppers stated that they could think of at least one improvement that would help the purchase experience become more users friendly and provided relevant verbatims.

While the majority of comments focused on uniquely encountered issues, there were some re-occurring themes:

- More information on Ticket Types / Conditions (viewing more at a glance)
- Highlight Peak and Off-Peak timings
- Clarifying where tickets could be collected