

National Rail 2013 Mystery Shopping Survey results

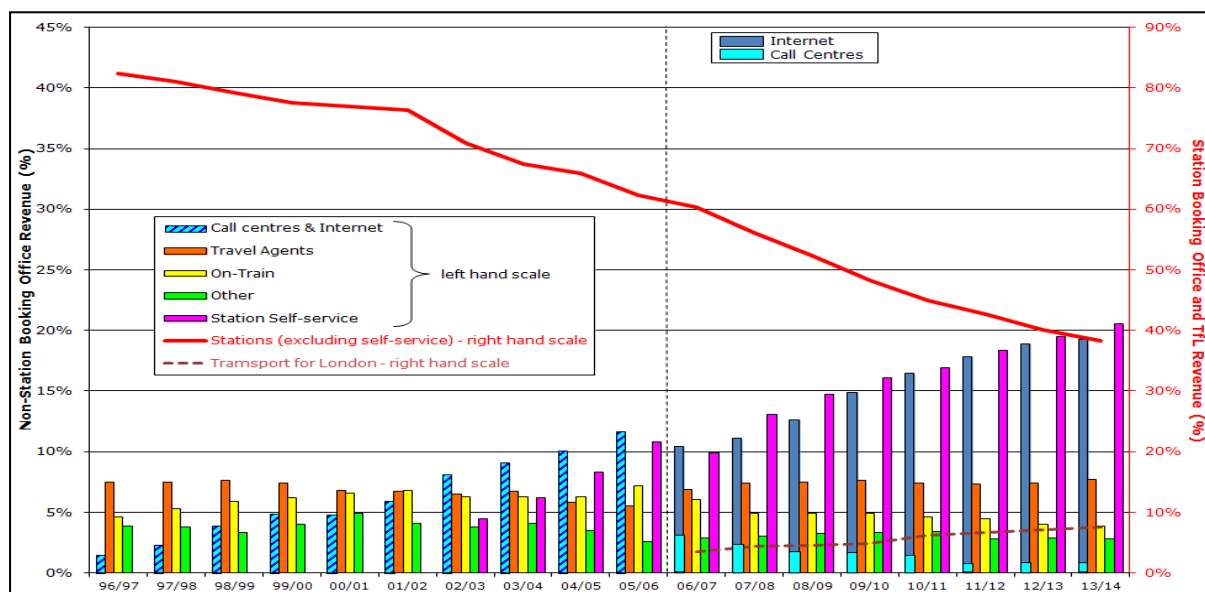
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1. Introduction

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

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



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

2. Mystery Shopping results summary

2.1 Ticket Offices

- 2.1.1 1,799 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 **96%** (i.e. the correct product being sold for the given scenario).
- 2.1.2 The best performing scenarios were the Disabled Railcard and the Monthly Season Ticket scenarios, with both scoring 98% or higher. The worst performing scenario was the Remote Sale scenario with a score of 92.3%. Three other scenarios scored less than 94% - Turn Up and Go return seven days, Frequent Traveller and Travelling with other Adults.
- 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. On the positive side, selling day returns instead of a cheaper weekly were significantly down on last year.

2.2 Ticket Vending Machines

- 2.2.1 197 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 **94%** was achieved for the correct product being sold.
- 2.2.3 The total time the shopper takes to complete their TVM purchase showed a clear correlation with the ability to obtain the correct ticket, with those completing their purchase in less than 2 minutes (98% accurate), more likely to achieve a successful outcome than those taking over 5 minutes (89%).
- 2.2.4 The survey results indicate that purchasing tickets from a TVM is a reliable solution for the large majority of customers and that even those with limited experience in using ticket machines should have few difficulties in obtaining a correct ticket.
- 2.2.5 On average, the total TVM transaction time (excluding queuing) was 2 minutes 27 seconds.
- 2.2.6 The majority of users found it easy to find information on ticket types and conditions, and were satisfied with the information when found.

2.3 Online sales

- 2.3.1 236 mystery shops were carried out across all the TOC internet sites, in proportion to their share of National Rail sales. The scenarios were broken down to ensure fulfilment 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 **96%** was achieved for the correct product being sold on TOC ticketing websites.
- 2.3.3 Almost 9 out of 10 customers, 88.6% 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 highest scoring attribute behind participants selecting a website.
- 2.3.4 Over 90% of customers stated that their chosen website was either satisfactory or very satisfactory in terms of displaying train times, efficiency and ease of use.
- 2.3.5 Satisfaction with ticket types, fares and conditions scored lower at 82.2%. Further analysis showed that employment status did affect how people ranked this measure; with students and unemployed users posting lower scores.
- 2.3.5 Over 50% of customers 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 objective of the survey is to measure the accuracy of station ticket retailing, with the key output being a measure of industry retail performance by scenario and an overall industry score.

The key principle underlying the methodology is to sample and evaluate sales 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 the LENNON 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 2012. The ticket purchases are split into scenarios using assumptions laid out in section 3.2.

In order to help provide more statistically robust scores at a scenario level, there was an increase in the overall proposed sample size over last year from 1,440 to 1,855. The 2013 sample sizes are summarised in Table 1 below.

Table 1: Sample sizes for 2013

Scenario No.	Scenario Description	2013 target shops
1a	Turn up & go, return same day. Priority = flexibility/speed	290
1b	Turn up & go, Single. Priority = flexibility/speed	134
1c	Turn up & go, Return same day. Priority = cost	17
1d	Turn up & go, Single. Priority = cost	9
2	Turn up & go return 7 days' time	159
3	First Class	151
4	Advance Purchase	193
5	Remote Sale	184
6a	Frequent traveller (5 days a week)	66
6b	Frequent traveller (4 days a week)	67

6c	Frequent traveller (3 days a week)	67
7	Monthly or longer season ticket	110
8	Travelling with other adults	110
9a	Railcard-Senior	63
9b	Railcard-Family	9
9c	Railcard-Network	20
9d	Railcard-16-25 yr old	86
10	Disabled travellers (using DPRC)	120
Total		1,855

3.2 Scenario Definitions

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

Table 2: Definition of the Ten Scenarios

Scenario Number	Time of Travel	Return Date	Class	Customer Priority	Additional Factors
Turn up and go					
1	Immediate	Same day (or not if single)	Std	Journey time or cost	None
2	Immediate	7 days' later	Std	Cost	Route & prices
First Class					
3	Immediate & Future	Same day	1 st	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 day's time	Same day & future	Std	Accessibility	Minimise interchanges

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

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

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

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

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

Scenario 3 – First Class

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

Scenario 4 – Advance Purchase

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

Scenario 5 – Remote Sale

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

Scenario 6 – Frequent Traveller

This scenario involves a shopper travelling 3, 4 or 5 days for this week only (starting from today) and asking the clerk for the cheapest way of doing this. This scenario is designed to test the clerk’s ability to check whether several day tickets is cheaper than a weekly season or whether Oyster PAYG in London may be the cheapest option. This 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 that of the shopper.

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 PTE areas, integrated travel options (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 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

LENNON queries by TOC were used in order to create the sample of ticket offices and journeys within each scenario. During this stage, the outputs were checked and the following issuing points were removed:

- Portable Ticket Issuing machine locations
- 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 issuing points, especially Internet.

The remaining stations were checked in conjunction with the National Rail website to ascertain whether they were indeed valid ticket offices. Several offices with RSP National Location Codes (NLCs) were removed, the main ones being either paying in points or non-ATOC ticket offices. Note that in some cases, a station will have more than one ticket office and if these ticket offices have a separate NLC and enough transactions then they can both appear in the sample. 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).

A ‘disproportionate stratified sample’ was selected, with a minimum of 110 flows from each of the scenarios. However, some scenarios were given a higher sample size. These fell into two categories:

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

Although the methodology was not designed to measure retail accuracy by TOC, the sample size for each TOC was roughly proportional to the ticket issues in that TOC, with a minimum sample size per TOC being stipulated so as to ensure a representative spread of mystery shops across all TOCs. In addition, the sample size within each scenario for each TOC was proportional to the corresponding ticket sales.

As these aspects of sample design to ensure robustness of the data are 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 3.4).

For each TOC, all Origin and Destination, Ticket Type and Status flows were downloaded from LENNON. 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 5 below) with three exceptions:

- Scenarios 1c and 1d were based on choosing which of the 450 Scenario 1 journeys could involve a cheaper dedicated or routed ticket based on checks using Avantix fares software.
- Frequent Traveller flows were taken from a sample of weekly season records;
- Travelling with other adults flows were taken from a sample of Scenario 1 journeys

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

As shown in Table 3 below, a representative range of station sizes was sampled in 2013. 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 stations by group

Group Number	Ticket Issues Per Year	Number of Stations	Number of stations sampled 2013
1	> 750,000	12	12
2	> 195,000	178	164
3	> 95,000	551	360
4	< 47,000	615	151
Total		1,356	687

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

because any unusual ticket requests may alert the ticket office to the presence of a mystery shopper.

3.4 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. The definition and assumptions used in calculating the weights by scenario are shown in the table below.

Table 4: Definition of scenario weights

Scenario description	Scenario Number	Description
Turn up and go	1a/c	All Standard Class returns, non-advance purchase tickets, not from remote stations, not using a Railcard and travelling back the same day.
	1b/d	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
Frequent Traveller	6	Based on proportions from National Passenger Survey and National Rail Travel Survey
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
Railcard User	9	All Standard Class tickets, non-advance purchase, not from remote stations, using one of the 4 major Railcards.
Disabled Railcard	10	All Standard Class tickets, non-advance purchase, not from remote stations, using a Disabled Railcard.

3.5 Fieldwork and Marking

TSL provided the fieldwork company, ESA, with a set of survey records. As well as carrying out the shops, a separate team from ESA (independent from those carrying out the actual fieldwork) marked the shops. Unlike the mystery shoppers (who are selected to represent 'average' rail users with no specialist knowledge of the industry), the marking team are trained to assess whether the correct ticket was sold, based on the scenario specification and details of the shop as recorded by the fieldworker. ATOC personnel are consulted in any marginal or debateable cases for further adjudication.

Where a transaction is deemed to have been sold inaccurately, details (including copies of the tickets actually purchased) are supplied by TSL to the relevant TOCs to allow for any further information or mitigating circumstances to be advocated. ATOC then made a final judgement on whether the shop was marked as a failure, following which the data was sent on to TSL for analysis of overall results.

3.6 Analysis of Results

3.6.1 Response Rates

56 of the 1,855 (3%) of the mystery shopper transactions for scenarios 1 to 10 were not completed successfully, leaving 1,799 completed transactions (97% response rate) for analysis. This was lower than 2012 (99%) but higher than 2011 (95.3%). The main reasons for the reduction from 1,855 to 1,799 were as follows:

- Eight records (0.4% of the proposed sample) were removed where no transaction took place because a ticket office was closed during its advertised opening hours. Because the transaction itself had not failed, these records were not classified as "retail" failures but were removed from the analysis sample. This proportion of closures is only slightly higher than that recorded the previous year (0.3%).
- There were four cases where the transaction did not take place because station staff insisted that the ticket be bought on Oyster so a transaction could not take place there and then;
- There were two cases where the ticket could not be purchased on the day;
- There was one case where the shopper did not have a passport photo to carry out the scenario (Frequent Traveller);
- There was one case where the journey specified for the scenario was inappropriate;
- The remaining 40 (2.2%) records were cases of transactions being considered "void" because it was unclear from the shopper records whether they were passes or fails. This was a worse position than last year where this figure was only 0.5% and may reflect the appointment of a new

fieldwork agency in 2013, although this variation is more than compensated for by the increased sample size.

3.6.2 Success Rates

The 1,799 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 13 periods ending March 2013.

Table 5 contains these results and the associated 95% confidence intervals. Confidence intervals are shown to demonstrate whether pass rates are “statistically significant” in how they differ from the target pass rate of 96.5% (or from the 2012 performance). If the difference between 96.5% and the 2013 scores is greater than the confidence interval, then we can be 95% certain that the national pattern of behaviour that can be extrapolated from this survey is definitely above or below the target set. If the difference between the 2012 and the 2013 scores is greater than the confidence interval, then we can be 95% certain that observed change reflects actual behaviour changes as opposed to random fluctuations.

The overall (all-scenario) score of 96% this year is below this target; however, with a confidence interval of 0.9% (meaning the true figure lies between 95.1%-96.9%), this result is not statistically significant, although it is on the border of significance.

The overall score of 96% is above last year’s score of 95.5% although again this result is not statistically significant.

Table 5 shows that on an individual scenario level, the Turn up & Go Return Same Day, Frequent Traveller and Disabled Railcard scenarios were all significantly better than last year; in contrast, the First Class scenario was significantly worse than last year.

Table 5: Mystery Shopper Success Rates by scenario

Scenario Number	Scenario Description	Pass rate 2013	95% Confidence Interval 2013	Sample Size 2013	Pass rate 2012
1	Turn up and go, return same day	97.8%	1.4%	449	94.7%
2	Turn up and go, return 7 days	93.7%	3.8%	158	97.1%
3	First Class	94.6%	3.6%	149	98.8%
4	Advance Purchase	94.6%	3.3%	184	93.8%
5	Remote Sale	92.3%	3.9%	182	95.1%
6	Frequent Traveller	93.4%	3.6%	181	88.1%
7	Monthly Season ticket	98.0%	2.7%	101	97.0%
8	Travelling with other adults	93.6%	4.6%	110	98.0%
9	Railcard	94.2%	3.5%	173	97.6%
10	Disabled Railcard	99.1%	1.7%	112	95.3%
Overall		96.0%	0.9%	1,799	95.5%

Disaggregate analysis of pass rates was undertaken on a sector basis with TOCs divided between Long Distance, London and South East and Regional.

Table 6 below shows the pass rates by sector with Long Distance TOCs scoring highest. While the difference between Long Distance and the other sectors is statistically significant, there is not a statistically significant difference between London & South East and Regional. Some of these differences between sectors reflect the different scenarios for each sector – for example, Long Distance TOCs have fewer Frequent Traveller shops (the lowest scoring scenario). Only Regional has a pass rate this year which is statistically significant (improved) compared with last year.

Table 6: Unweighted pass rates by industry sector

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

3.6.3 Reasons for failure analysis

Using data gained from the marking carried out by ESA, those records which were marked as failures were analysed by TSL. Table 7 below shows the analysis of reasons for failure by scenario.

Table 7: Reasons for failure by type of failure and scenario

Reason for failure	Sc 1	2	3	4	5	6	7	8	9	10	Total
Cheaper advance not offered	-	-	-	8	-	-	-	-	-	-	8
Cheaper routed/dedicated ticket not sold	2	8	2	-	1	1	1	1	4	-	20
Day return instead of period return	-	-	-	1	1	-	-	-	-	1	3
Day tickets rather than cheaper weekly	-	-	-	-	-	4	-	-	-	-	4
Incorrect date on ticket	-	-	-	1	-	-	-	-	-	-	1
Incorrect discount applied	-	-	-	-	-	-	-	1	4	-	5
Incorrect origin/destination	1	-	-	-	1	-	-	-	1	-	3
Off-peak rather than peak	4	1	1	-	5	4	-	-	-	-	15
Oyster format not required	-	-	-	-	-	-	1	-	-	-	1
Peak rather than cheaper off-peak	2	-	3	-	3	-	-	1	1	-	10
Period return instead of day return	-	-	-	-	1	-	-	-	-	-	1
Single instead of return	1	1	-	-	2	-	-	-	-	-	4
Sold fewer tickets than required	-	-	-	-	-	3	-	4	-	-	7
Standard instead of First	-	-	2	-	-	-	-	-	-	-	2
Grand Total	10	10	8	10	14	12	2	7	10	1	84

The table shows that the single largest type of failure was not selling a cheaper routed or dedicated ticket which occurred most often in Scenario 2 (Turn Up and Go, return 7 days): 20 of the 84 failures overall (i.e. around 24%) came from this scenario.

The 84 failures can be summarised as one of three types:

- **Transaction failures** – where a clerk refused to sell a ticket without sufficient reason. While there were six instances of this last year, there were none this year, which is a major improvement, especially when allowing for this year's higher overall sample. 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 five instances of this, this year compared with only one case last year. Of the five failures, four were associated with the Railcard scenario (scenario 9) and one with the Travelling with other Adults scenario (scenario 8).
- **Ticket failures** – where a ticket was sold but it was incorrect or inappropriate to the scenario for various reasons. This was by far the most common type of failure this year, accounting for 79 of the 84 failures. As noted earlier, not selling a cheaper routed/dedicated ticket was the single most common failure but there were also many instances of other failures such as not offering cheaper advance tickets and, in particular, selling for travel in a different time period than the scenario demanded (peak or off-peak).

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

Turn Up and Go Scenarios

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 97.2% for this sub-scenario – a similar score to last year's 97%. Four of the eight failures were for selling off-peak tickets rather than the peak tickets which were more appropriate to the specific requirements of the given mystery shop.

Scenario 1b scored no failures this year compared with one last year. This sub-scenario, which is the most straightforward, also recorded no fails in 2011.

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 only one fail was recorded in each of these two scenarios, this led to scores of 94% and 89%, respectively.

Scenario 2, which is turn up and go but return a week later, recorded 93.7% this year, down on the 96.4% last year, although not a statistically significant reduction. As noted above, most of the failures were associated with cheaper dedicated or cheaper routed tickets not being offered.

First Class

This scenario was the only scenario to record a statistically significant reduction on last year's score (94.6% vs. 98.8%). There were several significant reasons for failure – peak rather than a cheaper off-peak, selling a Standard rather a First Class ticket, and not selling a cheaper routed/dedicated ticket.

Advance Purchase

There were ten failures this year, mainly cases of not offering cheaper advance tickets. The score of 94.6% was marginally better than the 93.8% scored last year.

Remote Sale

This scenario was the lowest scoring scenario this year, recording a reduction on last year, although this change was not statistically significant. There were 14 failures this year, dominated by not selling a ticket for the right time period prescribed.

This is one of the more complex scenarios and it is interesting to note that there was only one case of getting an incorrect origin, the reason for failure that one might most expect. It is possible, however, that with the clerk concentrating on getting the origin correct, it makes it more likely that errors will occur elsewhere.

Frequent Traveller

As shown in Table 7, this was the second worst scoring scenario this year, although this recorded a statistical improvement on last year. Of the 12 failures recorded, four involved selling several day return tickets rather than a cheaper weekly season - this is much improved on last year where there were 16 examples of this. A further four involved selling off-peak tickets where a more appropriate option was more flexible tickets and there were three cases when an incorrect number of tickets were sold (e.g. the shopper wanted to travel for three days in a week but was only issued with two day return tickets).

The marking regime for this scenario takes 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 cost of the extra retail workload is likely to be more than the price difference, 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 (96.6% and 95.1%, respectively) than travelling five times a week (only 88.5%). Despite the relatively low sample sizes for each sub-scenario, these differences are on the borders of statistical significance. 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 four cases where off-peak day returns were sold rather than a cheaper weekly season ticket.

Monthly Season Ticket

This scenario was the second highest scoring this year, recording only two failures compared to three last year. The failures were not selling cheaper routed/dedicated ticket; and insisting on an Oyster format (resulting in an additional £5 deposit to the customer) when paper tickets were still sold from the station.

Travelling with other Adults

This scenario fell from being one of the highest scoring last year (98%) to one of the lowest this year (93.6%). The failures were dominated by selling fewer tickets than required; for example, mistakenly issuing only one ticket when three were travelling.

Railcards

This scenario fell from 97.6% last year to 94.2%, a decline which was on the borders of statistical significance. Failures were dominated by not selling a cheaper routed/dedicated ticket and applying the wrong discount (not applying the 34% discount at all in the four cases this year).

This scenario is split between four sub-scenarios, the Senior, Family, Network and 16-25 Railcards. As last year, no failures were recorded in the Family and Network sub-scenarios, although these have smaller samples. The Senior Railcard sub-scenario scored 96.7% compared with the 16-25 Railcard scoring only 90.6%.

Disabled Railcard

This scenario was the highest scoring scenario this year, scoring 99.1%, a statistically significant improvement on last year's core of 95.3%. Only one failure was reported this year - selling a day return rather than the period return requested.

3.6.4 Level of Partial Retailing

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

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

In the majority of instances where the best ticket was not sold, the nature of the fail does not benefit the selling TOC to the detriment of another. In the very few instances where it has, the rate of occurrence is so rare as to imply that the fault lies in human error, and not any deliberate strategy on the part of the retailing TOC to improve revenue from partial retailing.

3.7 Analysis of Service Issue factors

The Retail Mystery Shopper survey also collects information on several “service issue” factors. These are now analysed in total - and by sector and station size, where relevant and any significant conclusions are drawn. Targets are not set on these factors, but they are captured and analysed to see whether lessons can be offered in how to further improve customer service.

3.7.1 Ticket office closures

There were only eight cases of ticket office closure in the survey this year (0.4%), similar to the rate of 0.3% last year.

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

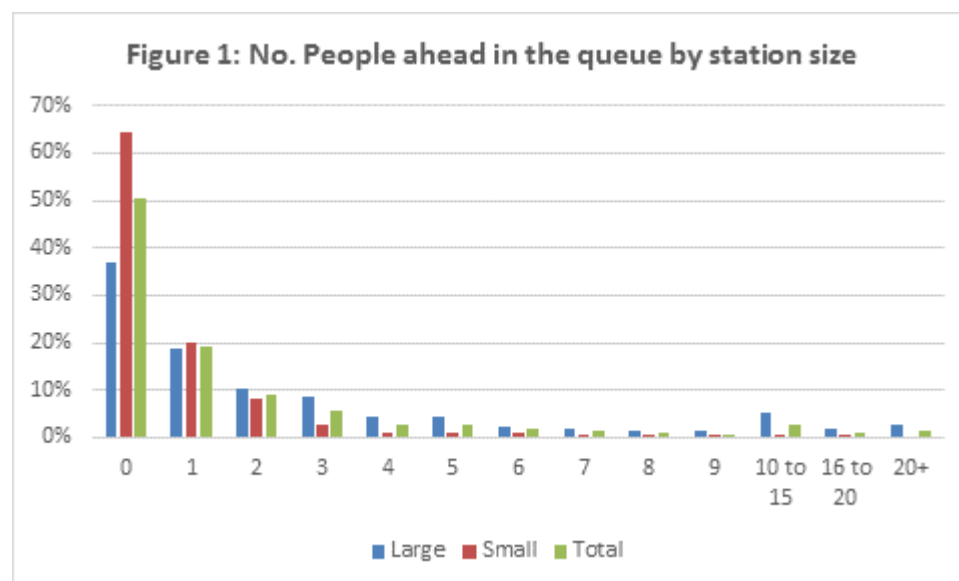
Of the eight closures, four provided information on why the ticket office was closed, but four did not.

3.7.2 Queuing Data

Two measures of queuing were recorded in the survey:

- Numbers of people ahead in the queue
- Number of minutes waiting to be served (after arrival at station)

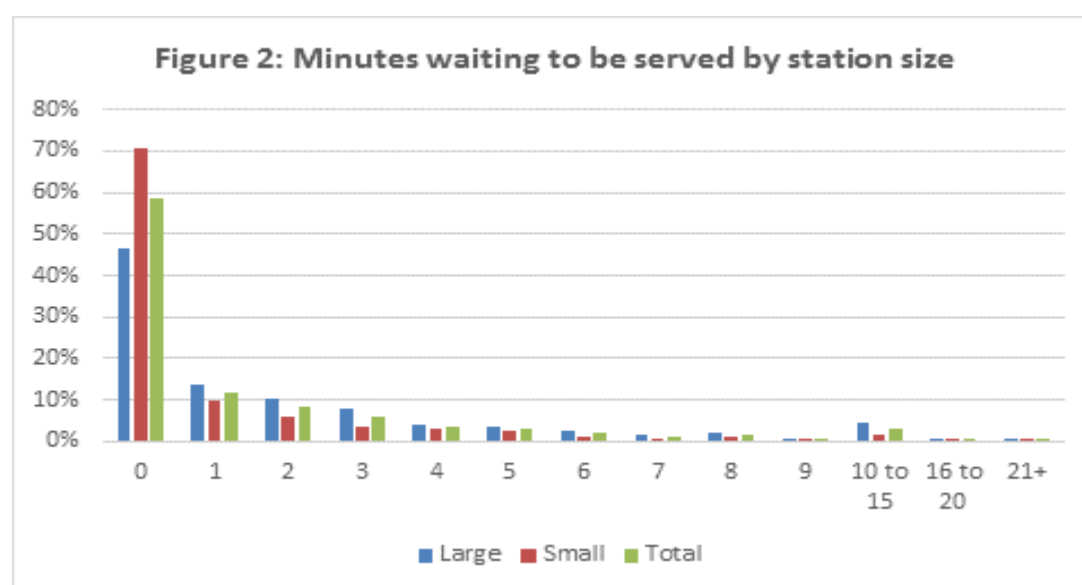
The average number of people in the queue ahead of the shopper on arrival was just over 2, a significant reduction on last year’s figure of 2.7 (see Table 9). The average of 2, though, hides a significant amount of variation as shown in Figure 1 below. Around 70% of the shoppers in the 2013 survey had no one or only one person ahead of them in the queue. However, the long tail on this distribution (seen almost totally at the larger stations) pushes the average up to 2.



The average number ahead in the queue is strongly correlated with station size with larger stations having longer queue lengths (see Table 9) – even though these have reduced significantly since 2012.

Table 9: Queue length by station size by year

	2013	2012	2011
Large	3.2	4.0	3.7
Small	0.8	1.0	1.0
Total	2.0	2.7	2.6



A similar pattern is observed in the average number of minutes waiting to be served. The average is 1.7 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 stations, so is queuing time, again showing improvement since 2012, as shown in Table 10.

Table 10: Average minutes waiting by station size by year

Station size	2013	2012	2011
Large	2.4	2.7	2.7
Small	1.0	1.3	1.5
Total	1.7	2.2	2.2

3.7.3 Clerk's questions and actions – outward journey

This section deals with questions that the clerk might be expected to ask about the passenger's outward journey. Note that some questions are not relevant to some scenarios – 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. The %s shown are only based on those scenarios where the question could be relevant.

Table 11 below shows that in only around half of such cases did the clerk attempt to confirm where the passenger wanted to travel to and in 60% of cases when they wanted to travel.

Comparing these numbers with 2012 figures (Table 11) shows that clerks appear to have improved at asking where the passenger is travelling but are at a similar level when confirming when they are departing. Generally, there were improvements over last year in most of the other questions, although the percentages are still small in absolute terms.

Table 11: Proportion asking by question for outward journey

Clerk asked:	2013	2012	Statistical significance
Exactly where going	50.6%	44.1%	Yes
When departing	60.8%	59.9%	No
Can you travel earlier/later	22.0%	20.5%	No
Can you take a slower service	8.1%	5.8%	Yes
Would you mind changing trains	8.7%	7.0%	Yes
Which route are you taking	11.4%	8.1%	Yes

Note: All questions are adjusted by relevant scenario

3.7.4 Clerk's questions and actions – return journey

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

Table 12 below shows that in around 65% of cases, the clerk tried to ascertain when the passenger was coming back. However, this proportion drops to just over 45% for time of day returning and only around 40% for confirming the restrictions on the return journey. However, clerks have improved since 2012 with more asking about date and time of the intended return journey, as well as more making clear any restrictions on the return.

Table 12: Proportion asking on return journey questions vs. 2012

Clerk asked:	2013	2012	Statistical significance
When coming back	65.3%	60.6%	Yes
Time of day returning	45.8%	41.7%	Yes
Restrictions on return journey made clear	40.6%	32.5%	Yes

3.7.5 Clerk's questions and actions – cheaper ticket

This 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 for an off-peak return. As above, these questions are only relevant to some scenarios. Generally, Table 13 below shows that the proportions of the time that clerks suggested these options were 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 13: Proportion asking on cheaper tickets questions – by size of station

Clerk asked:	Large	Small	Total
Cheaper ticket – departing later	17.8%	15.6%	16.9%
Cheaper ticket – slower route	8.2%	4.9%	6.8%
Cheaper ticket – changing trains	6.9%	4.9%	6.1%
Cheaper ticket – off-peak return	42.9%	44.8%	43.7%

Despite the individual proportions being relatively low, there is ample evidence to suggest that these scores are significantly better than they were in 2012, especially in terms of asking about whether an off-peak ticket would be appropriate.

3.7.6 Clerk's questions and actions – Railcards etc

This section deals with other various questions and actions over ticket purchase. Whether the mystery shopper was asked whether they had a Railcard is an area which could apply to all scenarios excluding the Monthly season scenario (i.e. not just the Railcard scenarios). The 19.9% scored here is lower than 2012 although this difference is only just 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%, although this is higher than last year's score.

On the subject of arrangements for disabled travellers (Disabled Railcard scenario), only in 22.5% of occasions did the clerk ask whether the availability of a disabled toilet was essential and this was lower than last year's figure. Similarly, despite offering to make journey arrangements 12% of the time, the clerk actually made the arrangements in less than 2% of the time.

Table 14: Proportion asking on other questions vs. 2012

Clerk asked:	2013	2012	Statistical significance
Asked if had Railcard	19.9%	24.8%	Yes
Suggested buying Railcard to reduce journey cost	4.0%	1.9%	Yes
Availability of disabled toilet	22.5%	27.1%	No
Offered to make disabled journey arrangements	11.7%	12.1%	No
Actually made disabled journey arrangements	1.7%	3.7%	No

3.7.7 Conditions of carriage

10% of all of the mystery shops undertaken involved the shopper also requesting to see the national conditions of carriage. For 84.5% of transactions where the conditions were requested, they were provided.

However, Table 15 below shows that the advice given by clerks varies considerably between advising to consult the National Rail website (www.nationalrail.co.uk) to a few cases where a hard copy was provided to look at but which the customer had to give back. Given that clerks need only advise the customer to visit the above website in order to "pass" this test, a score of only around 85% should still be improvable. There were, for example, a number of instances where the shopper was advised to ask at another station or were given copies of the Passenger's Charter leaflet instead.

Table 15: Range of positive response on Conditions of Carriage

Positive response to question	2013	2012
Advised to visit website	57.5%	51.0%
Given hard copy	19.9%	12.9%
Other	0.0%	3.4%
Hard copy to look at but had to give back	7.2%	5.4%
Total	84.5%	72.8%

Compared with 2012, there were increases in all the types of correct response by the clerk and the overall difference is statistically significant, suggesting very tangible improvements in this area.

4. National TVM Mystery Shopping survey results

4.1 Introduction

The TVM survey is, as with the ticket office survey, designed to measure the accuracy of station TVM retailing, with the key output being a measure of industry retail performance by scenario and an overall industry score.

Again, the key principle underlying the methodology is to sample and evaluate sales in a way that is reflective of current customer transactions.

4.2 Objectives

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

Therefore, unlike the ticket office mystery shopping which assesses whether or not clerks have correctly sold the most appropriate ticket for the customer's needs, the TVM and online mystery shopping is designed to evaluate whether typical customers are able to source the correct tickets themselves through self-service channels.

4.3 Methodology

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

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

Mystery shoppers were asked to record whether they felt confident that they had purchased the correct ticket for their given scenario. This self-evaluation could then be compared with the independent marking carried out by trained ESA staff. The TVM mystery shopping fieldwork took place between 18 July and 12 October, 2013. Transactions were spread evenly across the day, from 6am though to 11pm.

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

4.4 Sample

The sample, which included a total of 200 TVM transactions (of which 197 were successfully completed) was designed by Transport Strategies Limited (TSL) on the same principles as the other forms of mystery shopping, with the objective of providing a sample of TVM purchase scenarios that was representative of current actual TVM ticket purchase behaviour, rather than, for example, being designed in order to test out scenarios which are any more complex than the average TVM transaction.

The stations selected for the TVM transactions were those with higher levels of TVM usage, across all TOCs.

4.4.1 Scenarios

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

Table 16: Scenario breakdown

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

Table 17: Split by ticket type

Ticket Type	Sample Size
First Class	5
Return Same Day	172
Return 1 Week Later	7
Single	16
Total	200

Table 18: Number of Railcard Scenarios

Railcard Scenario	Sample Size
Yes	21
No	179
Total	200

4.4.2 Weighting

Weighting was applied to the survey data to ensure the results were representative of actual 2012-13 TVM ticket sale transactions by TOC and TVM type. The following results are based on the weighted survey data.

4.5 TVM Transaction Times

4.5.1 Did you have to Queue to Use the TVM?

Across the total sample, 20% of mystery shoppers had to queue to use the TVM.

As the chart below illustrates, there was little variation in the need to queue across the day, with those purchasing between 1pm – 5pm being marginally the most likely to do so.

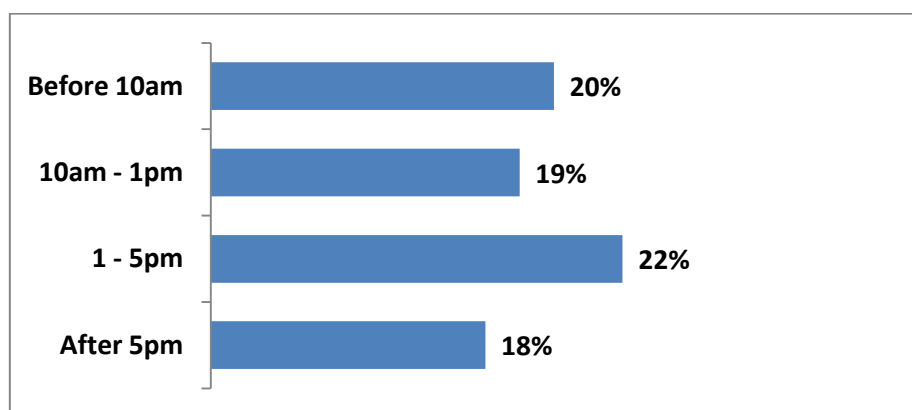


Figure 1 – Queued to Use TVM by Time of Day

In cases where mystery shoppers queued to use the TVM, the majority (70%) were required to wait for just one person to use the machine.

When queuing, the average queuing time was approximately one and a half minutes.

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

The average time taken for a TVM ticket purchase (including any time spent queuing) was 2 minutes, 45 seconds.

12% of mystery shoppers completed their transaction in less than one minute and a further 27% in 1-2 minutes. 11% of TVM transactions took more than 5 minutes to complete.



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

The average time taken for a TVM ticket purchase (excluding any time spent queuing) was 2 minutes, 27 seconds.

Although relatively few Railcard scenarios were conducted and hence the finding is not statistically significant, Railcard ticket purchases did take longer (2 minutes, 35 seconds) than non-Railcard transactions (2 minutes, 26 seconds).

Not surprisingly, mystery shoppers with most TVM experience (more than 3 times per month) were able to complete their purchases more quickly than less experienced users.

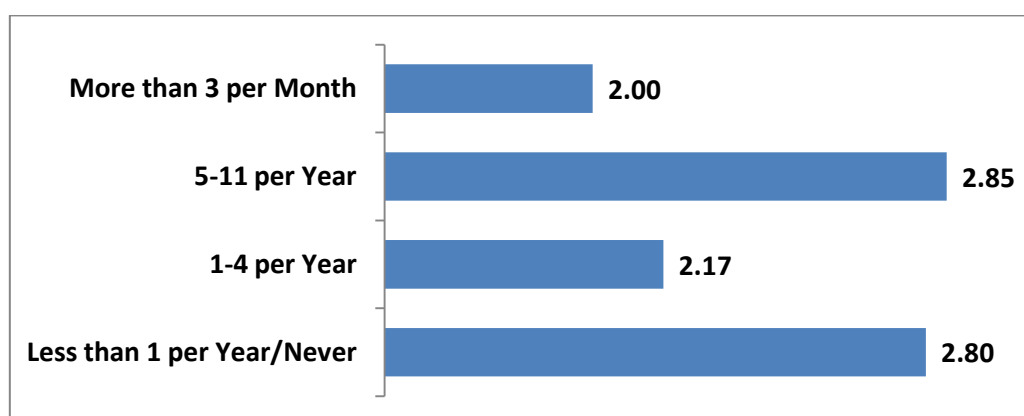


Figure 3 – TVM Transaction Time (Minutes) by Frequency of Buying Tickets from TVMs

4.5.4 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 4.9.

Although not statistically significant due to the low base size, consistent with the transaction time results, Railcard ticket purchases typically took more steps to complete (6.1) than non-Railcard transactions (4.8).

Despite taking less time to complete their purchases, shoppers with the most TVM experience typically used a greater number of steps to complete their transaction, suggesting that reducing the number of steps in the purchase process does not necessarily correlate with a shorter transaction time.

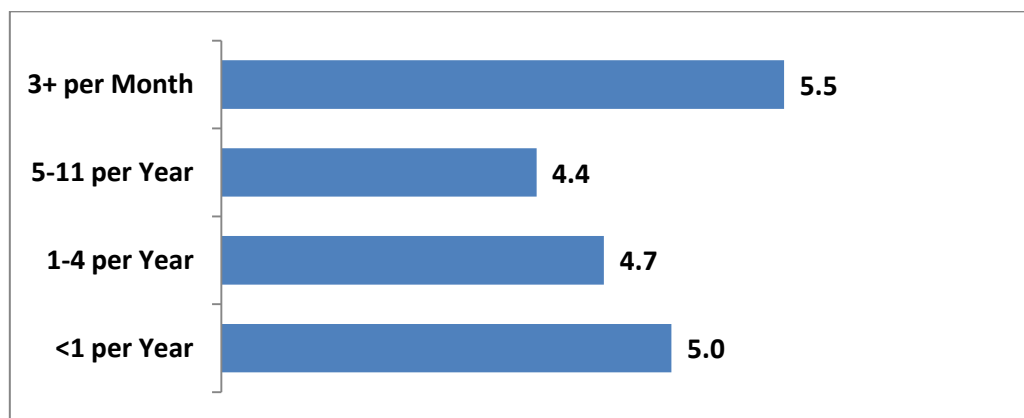


Figure 4 – No. of Transaction Steps by Frequency of Buying Tickets from TVMs

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

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

Overall, the average number of times a correction was required was 0.5 per transaction.

On this measure, the experience of the user does not appear to have a significant impact on the outcome.

4.6 Satisfaction with TVM Ticket Purchase

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

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 7% considered it difficult or very difficult to locate the required information.

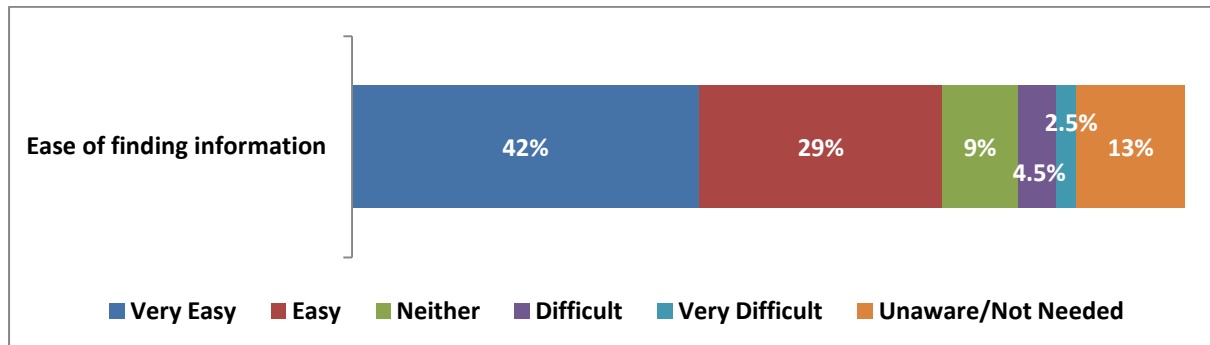


Figure 5 – Ease of Finding Info. on Ticket Types/Conditions

The shoppers with the greatest experience in purchasing from TVMs found most difficulty in finding information on ticket types and conditions. Only 25% of those who used TVMs more than 3 times per month found it very easy to locate this information, whereas the same was true for 48% of those who use TVMs less than 4 times per year.

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

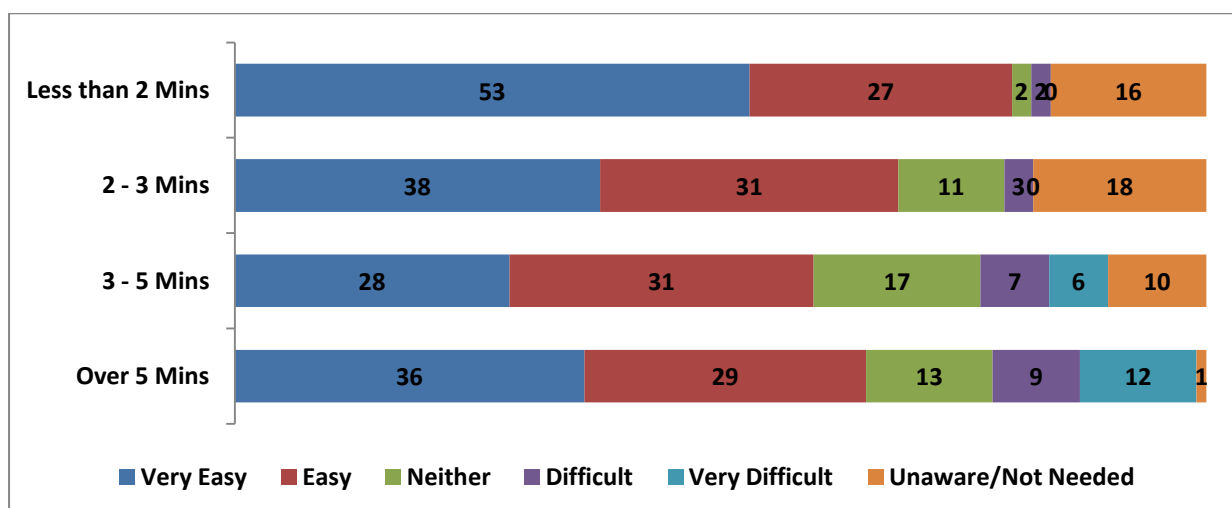


Figure 6 – Ease of Finding Info. on Ticket Types/Conditions by Total Purchase Time

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

The large majority of TVM mystery shoppers were satisfied with the information available on the machine about ticket types and conditions, with just 9% claiming to be dissatisfied.

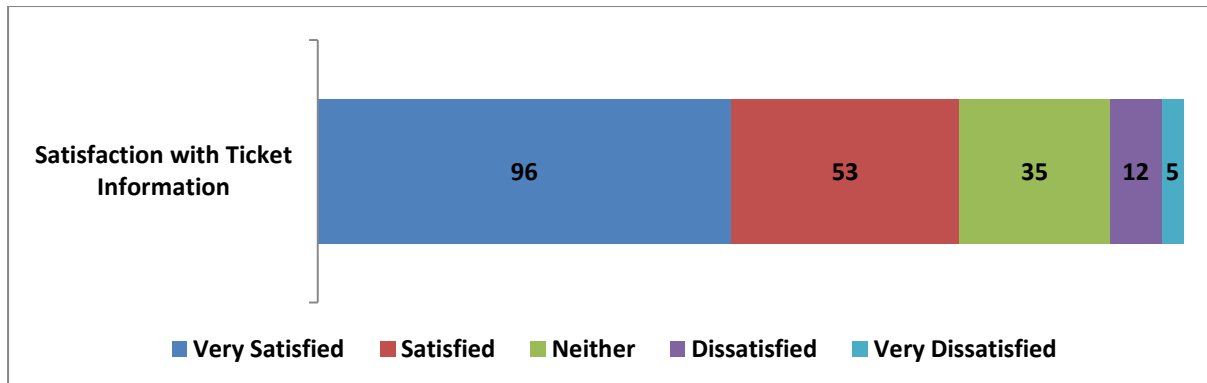


Figure 7 – Satisfaction with Info. on Ticket Types & Conditions

Although the base for Railcard scenarios is too small to make the variation significant statistically, as the following chart shows, there is a clear indication that those purchasing a Railcard ticket were much less satisfied with the information provided.

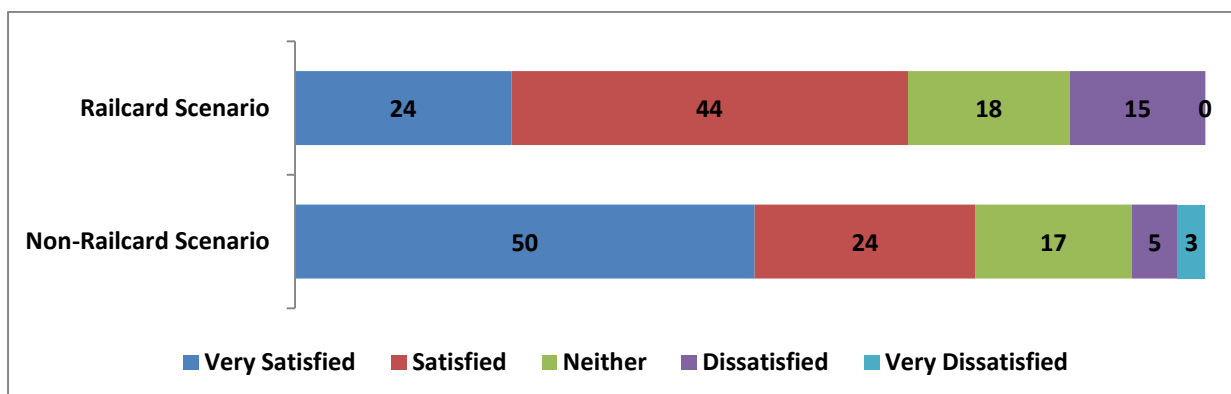


Figure 8 – Satisfaction with Info. on Ticket Types & Conditions by Railcard Scenario

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

There was very little dissatisfaction with the clarity of instructions for using the ticket machines. Overall, just 4% of mystery shoppers expressed dissatisfaction with this aspect of their TVM purchase experience.

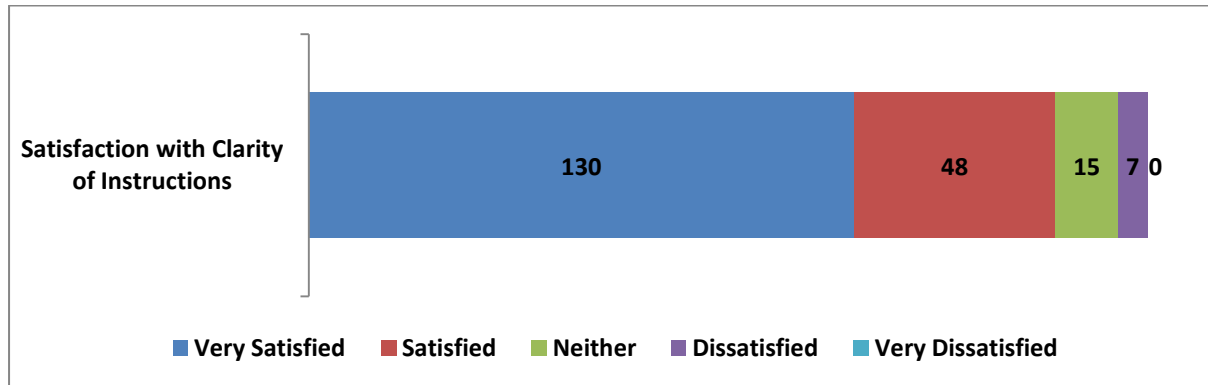


Figure 9 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by TVM Type

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

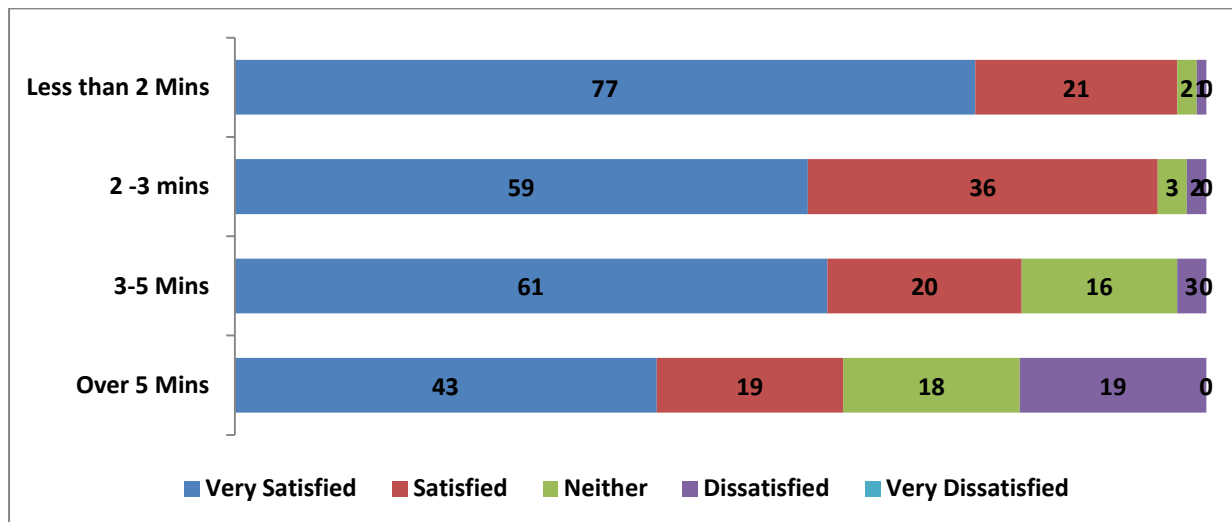


Figure 10 – Satisfaction with Clarity of Instructions for Using the Ticket Machine by Total Purchase Time

4.7 The Ticket Purchased

4.7.1 Were You Able to Purchase a Ticket?

Out of the total sample (200 TVM mystery shops), only in three cases was the shopper unable to successfully complete a ticket purchase.

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

Only around one in ten mystery shoppers expressed a lack of confidence in having obtained the correct ticket for their journey. The large majority were confident in their purchase, including 64% who were very confident and a further 23% who claimed to be fairly confident that their ticket was correct.

There was no significant difference in the confidence levels of the users of the two main types of TVM.

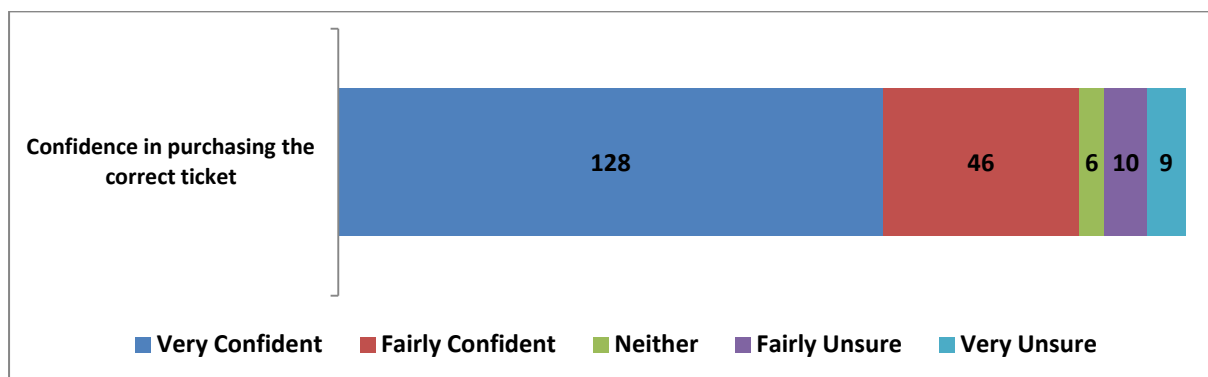


Figure 11 – Confidence in Getting the Correct Ticket by TVM Type

As the chart below illustrates, those taking less time to complete their purchase expressed much greater confidence in the outcome.

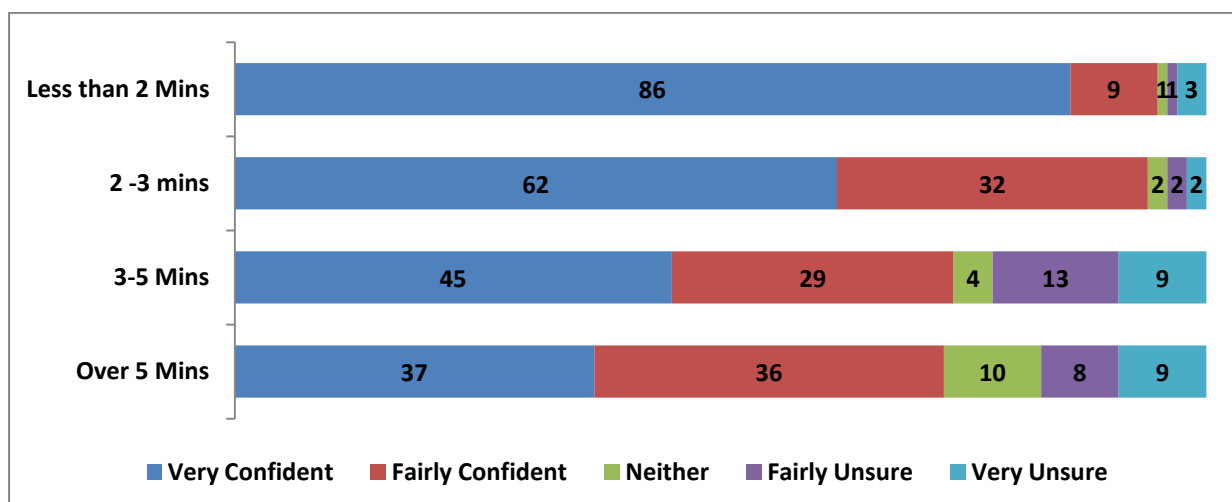


Figure 12 – Confidence in Getting the Correct Ticket by Total Purchase Time

4.7.3 Was the Correct Ticket Purchased?

Overall, when marked as correct or not versus the scenario requirements and specific journey details, 94% of all tickets were deemed to be correct.

Base sizes for the ticket scenario categories are too small to provide clear indications of success rates by ticket type, but the findings suggest that Railcard scenarios were as likely to be correct as others.

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



Figure 13 – Correct Ticket Purchased by Frequency of Buying Tickets from TVMs

The total time the shopper takes to complete their TVM purchase shows a clear correlation with the ability to obtain the correct ticket, with those completing their purchase in less than 2 minutes, more likely to achieve a successful outcome than those taking over 5 minutes.



Figure 14 – Correct Ticket Purchased by Total Purchase Time

5. National Online Mystery Shopping survey results

5.1 Introduction

The 2013 Online Mystery Shopping survey is designed to measure the accuracy of online retailing by TOCs, with the key output being a table of industry retail performance by scenario and an overall industry score.

As with the other surveys, the principle is to sample and evaluate sales in a way that is reflective of current customer transactions.

5.2 Objectives

The key objective of the overall mystery shopping programme is to evaluate the accuracy of rail sector retailing; however, in the case of online (as well as TVM) sales, there is no 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 website in order to purchase the correct and best value ticket for their particular travel scenario.

5.3 Methodology

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

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

Mystery shoppers were asked to record whether they felt confident that they had been sold the correct ticket for their given scenario. In addition to this self-evaluation, the tickets were also marked by trained ESA staff to provide an independent and accurate assessment as to whether the most appropriate ticket had been sold for that specific journey and travel scenario.

The online mystery shopping fieldwork took place between 23 June and 14 October, 2013. Unless otherwise stated, charts included in the report are based on the total sample.

5.4 Sample

The sample, which included a total of 236 online transactions with TOCs, was designed by Transport Strategies Limited (TSL) on the same principles as the other forms of mystery shopping, with the objective of providing a sample of online purchase scenarios that was representative of current actual online ticket purchase behaviour, rather than, for example, being designed in order to test out scenarios which are any more complex than the average online transaction.

Table 19: Online Mystery Shopping sample by website

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

In 2013 it was not possible to buy tickets online direct from Merseyrail or London Overground, hence they were excluded from the sample. Furthermore, C2C was excluded on the basis of its low market share, at less than 1%.

5.4.1 Scenarios

Table 20: Online Mystery Shopping Scenarios

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

Some scenarios were further sub-divided, for example Scenario 2 included both 2A (Peak) and 2B (Off-peak), but these sub-samples were too small for analysis purposes.

Mystery shoppers were further instructed regarding the means of ticket delivery/collection

Table 21: Sample by Specified Method of Ticket Delivery/Collection

Ticket Delivery/Collection Method	Samples from TOC sites
Collection from TVM	174
Collection from ticket office	8
Delivered by post	52
Download to print at home	2
Total	236

5.4.2 Weighting

Weighting was applied to the survey data to ensure the results were representative of actual 2012-13 patterns in respect of online ticket sale transactions by website and ticket type (scenario). The following results are based on this weighted survey data.

5.5 Length of Transaction

5.5.1 How Long in Total Did Your Ticket Purchase Take?

Across the total sample, the average time taken for an online ticket purchase was just under 10 minutes. 16% of mystery shoppers took less than 5 minutes to complete their purchase, whereas 19% took over 15 minutes.

Those purchasing via the websites of London & South East operators had the shortest transactions times, whereas purchases via the sites of Long Distance operators and third party retailers took the longest.

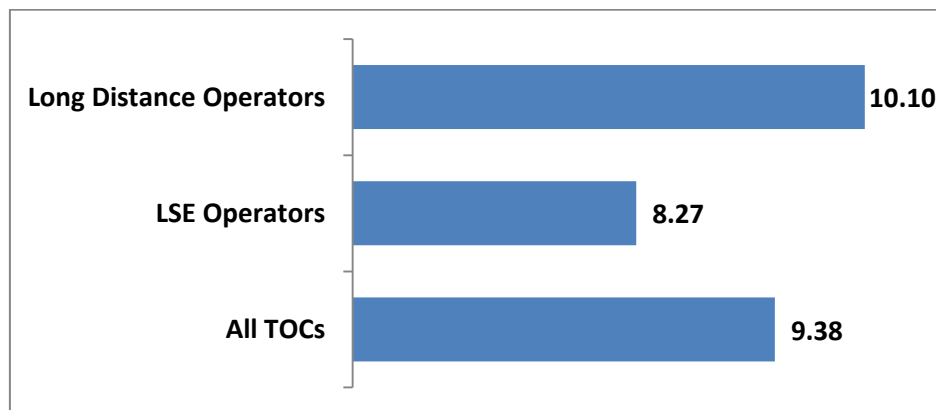


Figure 15 – Transaction Time by Retailer Category

There were some variations by scenario; transactions involving the purchase of tickets with a return in 1 week or involving travel with a child took the longest to complete, whereas day return and single tickets were, not surprisingly, the quickest.

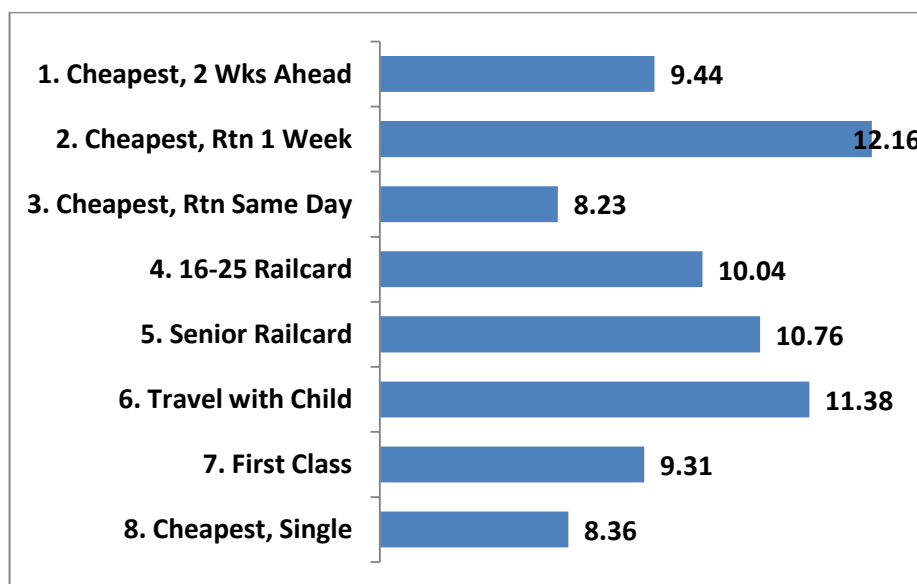


Figure 16 – Transaction Time by Scenario

Not surprisingly, those mystery shoppers who are less frequent online shoppers took the longest to complete their purchase transaction, almost 14 minutes, compared with less than 10 minutes for the sample as a whole.

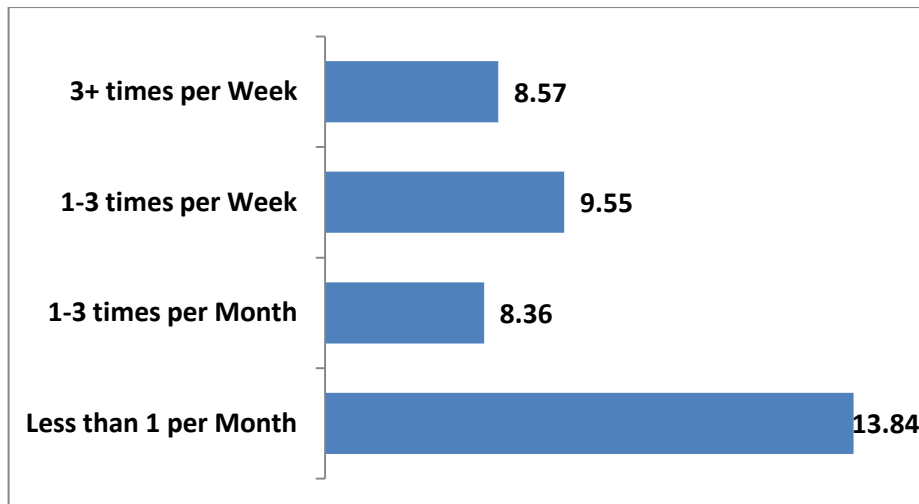


Figure 17 – Transaction Time by Frequency of Shopping Online

Also unsurprisingly, there is a clear correlation between the time to complete the purchase transaction and the shoppers' experience in buying rail tickets online, with the most inexperienced users taking almost twice as long to complete their transaction as those who buy rail tickets online weekly.

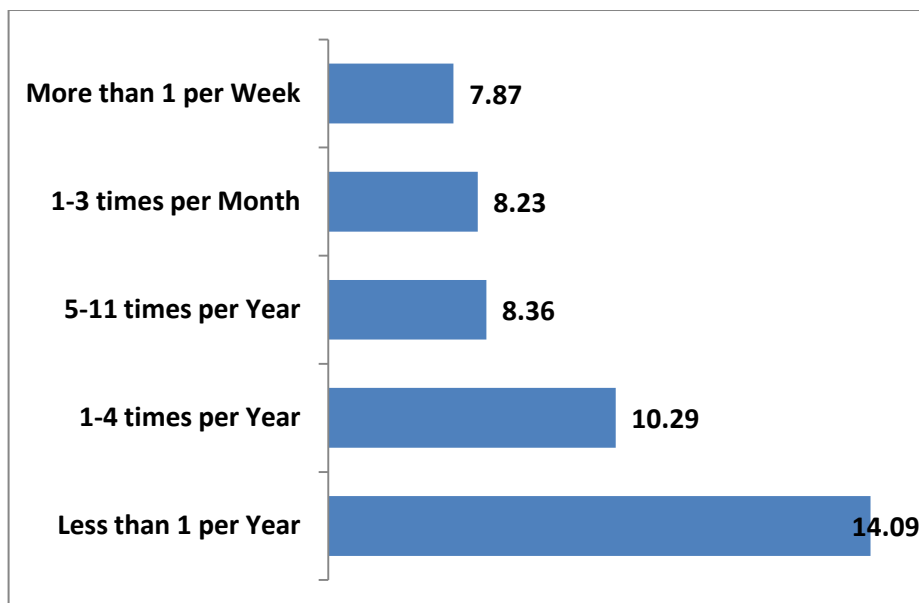


Figure 18 – Transaction Time by Frequency of Buying Rail Tickets Online

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

The overall mean number of screen views required in order to complete the ticket purchase was 7.5. Consistent with the transaction time results, those purchasing from London & South East operator websites had to view the fewest web pages, while those using Long Distance operator and third party retailer sites had to visit the most screens.

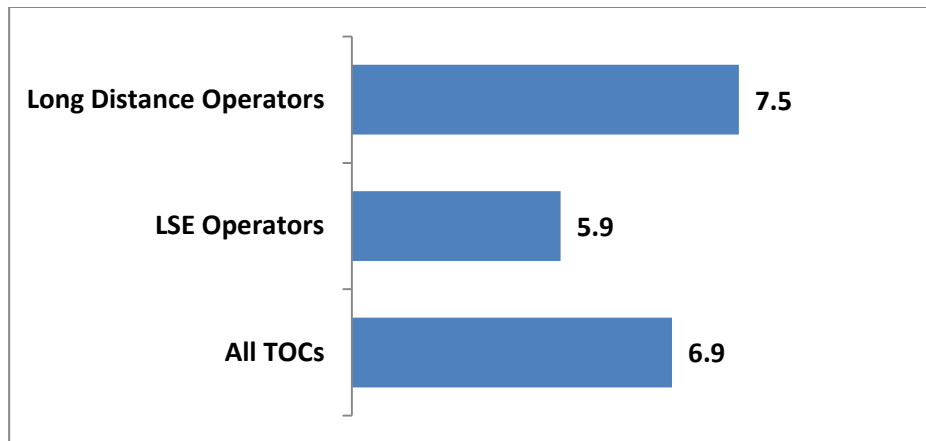


Figure 19 – No. of Page Views by Retailer Category

As illustrated below, Scenario 2 (Cheapest Ticket, Return 1 Week later) stands out as the most complex online transaction, requiring an average of 12 page views, compared with typically 7-8 for all other scenarios.

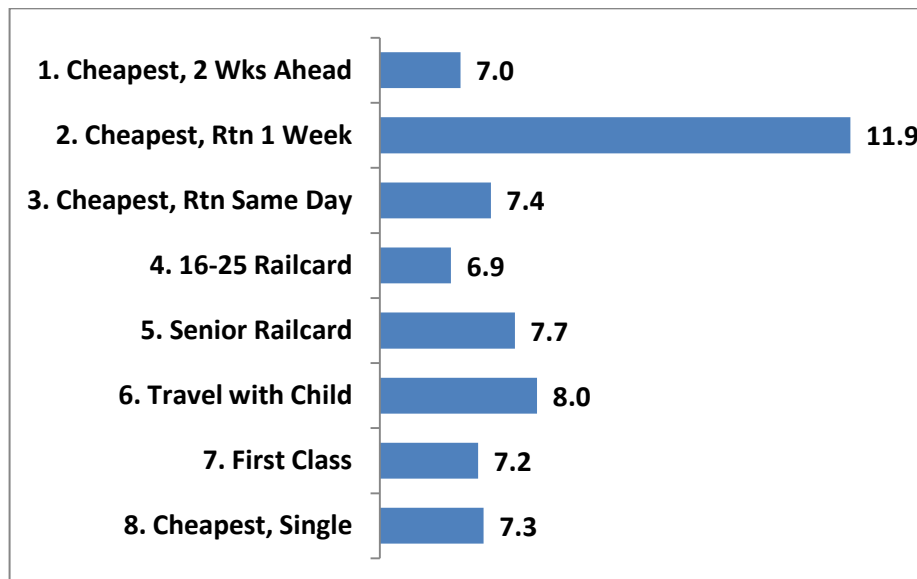


Figure 20 – No. of Page Views by Scenario

As with the transaction times, those more experienced in purchasing online generally were able to complete their purchase transactions taking fewer steps: an average of around 6 for those who shop online 3 or more times a week, compared with 7.5 for the sample as a whole.

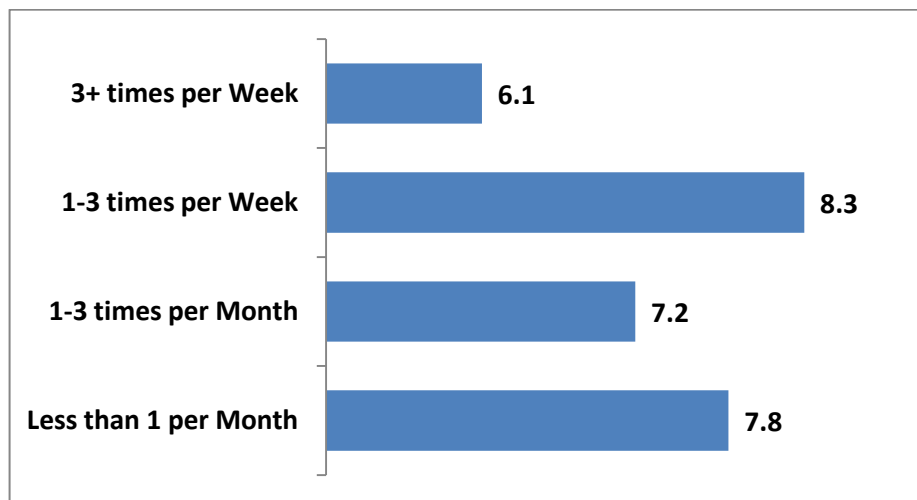


Figure 21 – No. of Page Views by Frequency of Shopping Online

Again mirroring the transaction time data, the number of page views required to complete the online ticket purchase correlates with experience in buying rail tickets online. Those with most experience (purchasing rail tickets online more than once a week), were able to purchase in an average of 6.6 steps, whereas the least experienced shoppers required over 10 page views.

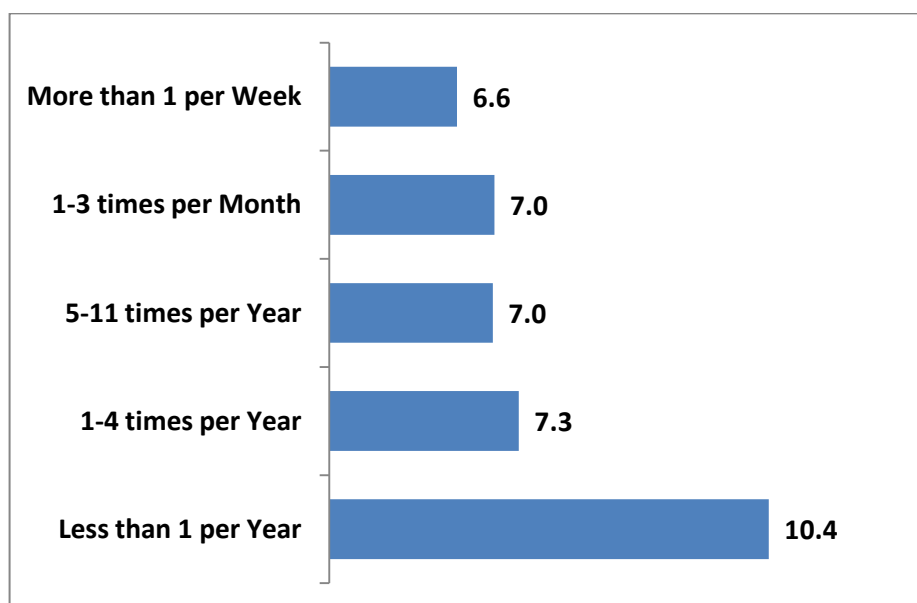


Figure 22 – No. of Page Views by Frequency of Buying Rail Tickets Online

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

As expected, the number of times the online mystery shoppers had to go back to a previous screen or correct an entry mirrored the patterns seen in respect of the total number of pages viewed.

Scenario 2 (Cheapest Ticket, Return 1 Week later) clearly causes some confusion, with these online purchases requiring an average of 3.2 “go backs” / corrections. Scenario 6 (Travelling with Children) also causes some difficulties, with an average of 1.1 “go backs” / corrections per transaction.

Overall, the average number of times a correction was required was 0.7 per transaction.

Again it is clear that the experience of the user is an important factor. Those most inexperienced in buying rail tickets online (purchasing less than once per year) had an average of 2.0 corrections, versus 0.7 for the overall sample.

5.6 Satisfaction with Online Ticket Purchase

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

The large majority of mystery shoppers found it easy or very easy to find information about ticket types and conditions. Only 5% considered it difficult or very difficult.

There was no great variation in this result according to retailer type, although there is some indication that the information was slightly easier to find on the TOC websites than on those operated by third party retailers.

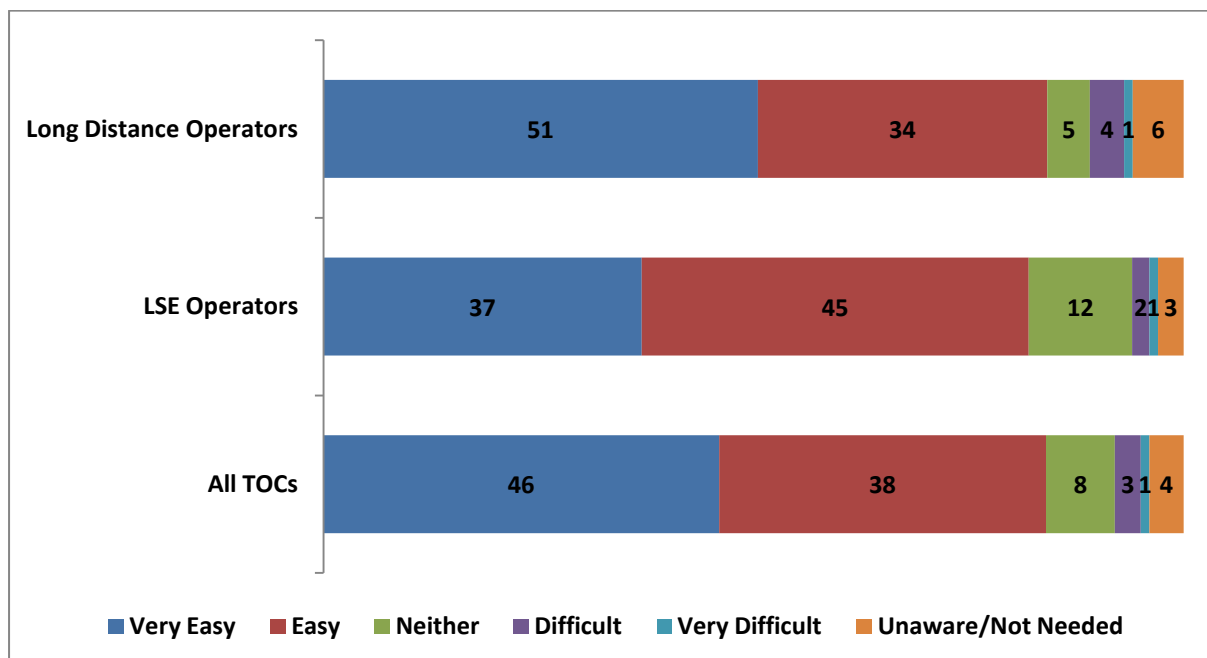


Figure 23 – Ease of Finding Info. on Ticket Types/Conditions by Retailer Category

The ease of finding information on ticket types appears to have no significant impact on a shopper's ability to obtain the correct ticket for their journey.

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

The large majority of online shoppers were satisfied with the information available on the website about ticket types and conditions, with less than one in ten claiming to be dissatisfied.

Although overall mean satisfaction levels for TOCs and third party retailers were broadly similar, this disguises some significant variations within the different categories of TOC. Only 4% of shoppers using the websites of Long Distance operators were dissatisfied with this aspect of the site, whereas the equivalent figure for London & South East users was 22%, although none of these claimed to be "very dissatisfied".

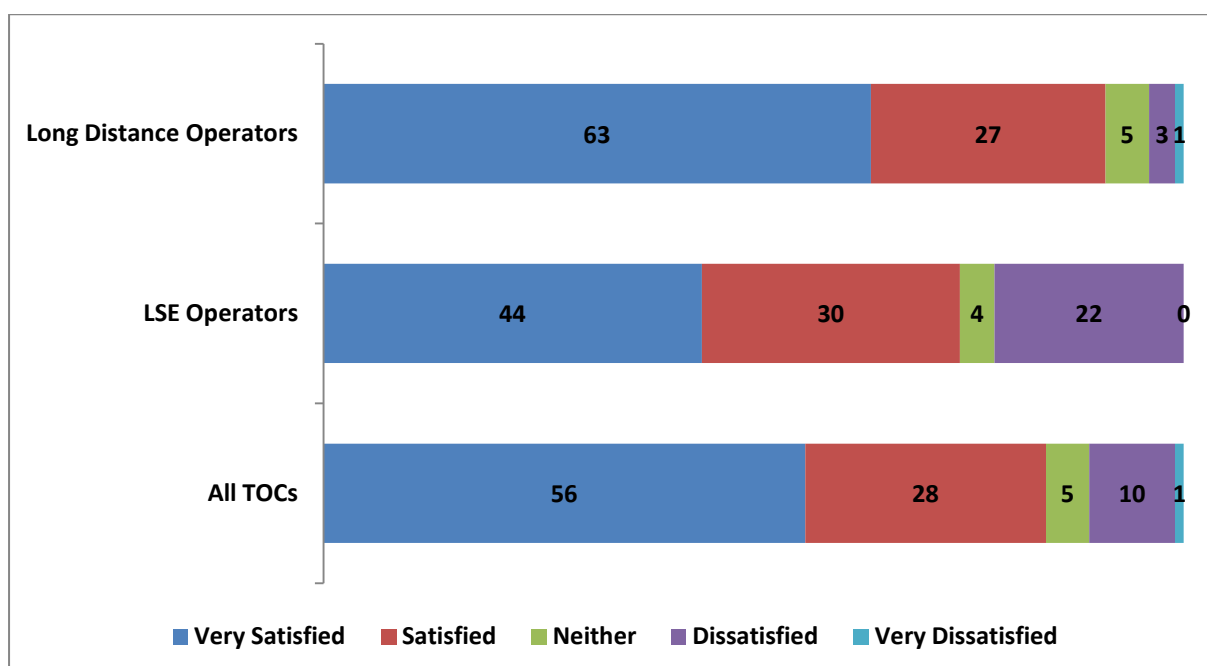


Figure 24 – Satisfaction with Info. on Ticket Types/Conditions by Retailer Category

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

However, the results suggest that those conducting Scenario 6 (Travelling with Children) were the least content with the information provided; one in four of this group of shoppers were less than satisfied, compared with 14% of the sample as a whole.

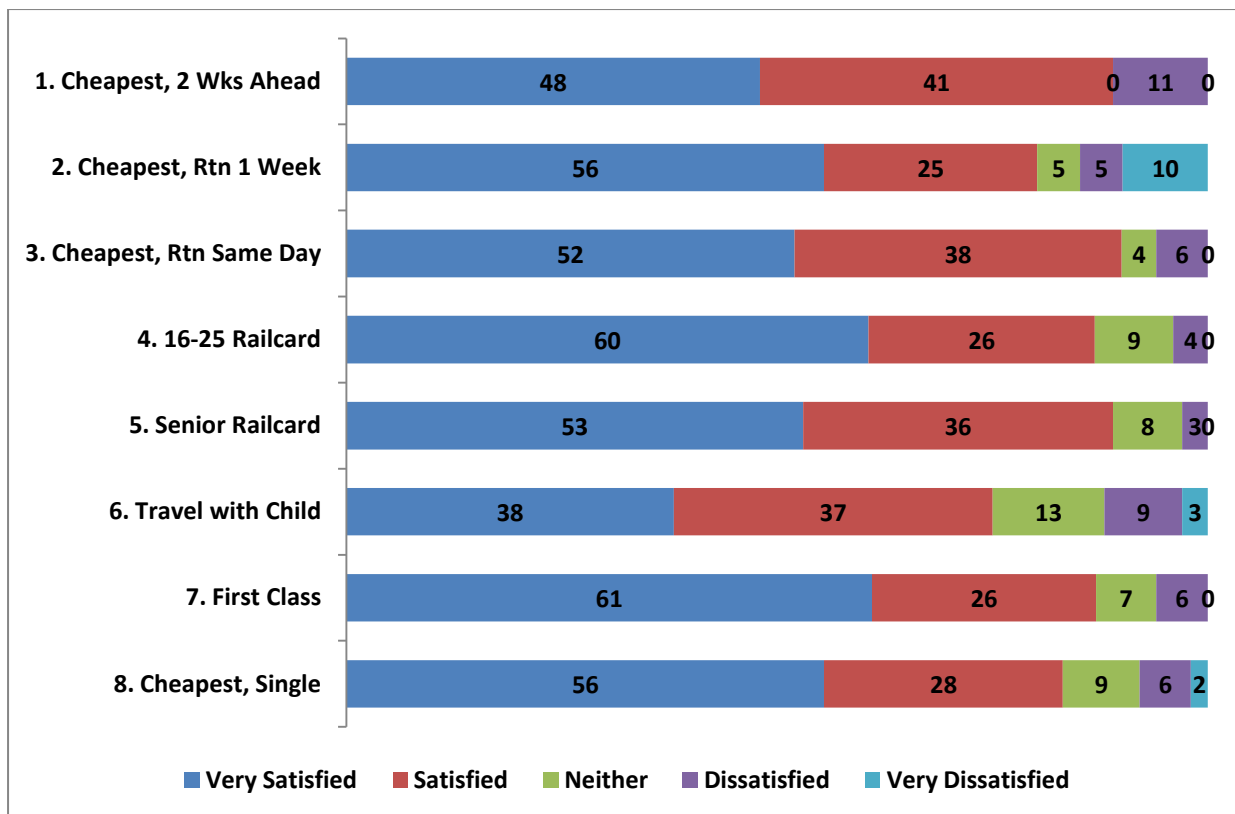


Figure 25 – Satisfaction with Info. on Ticket Types/Conditions by Scenario

5.6.3 How Satisfied Were You with the Clarity of Instructions for using the Website?

There was very little dissatisfaction with the clarity of instructions for using the website. Overall, just 3% of online shoppers expressed dissatisfaction with this aspect of their online purchase experience.

There is some indication that TOC websites were a little better at providing clear instructions than were the third party sites, but the differences are not significant statistically.

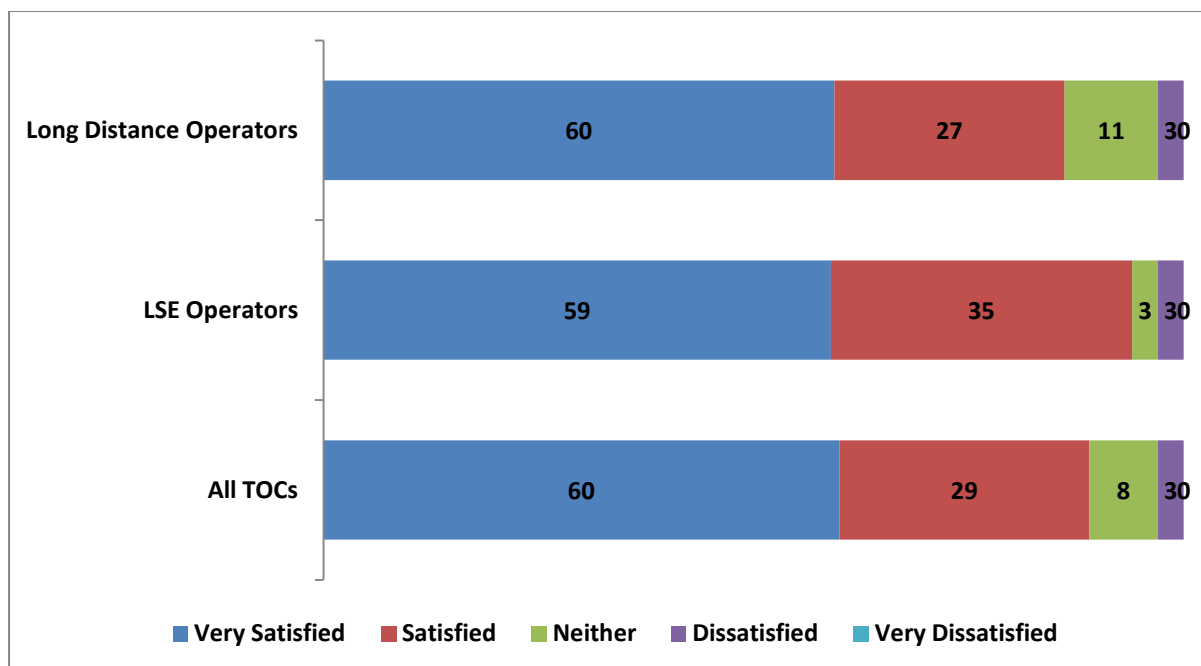


Figure 26 – Satisfaction with Clarity of Instructions by Retailer Category

5.7 The Ticket Purchased

5.7.1 Were You Able to Purchase a Ticket?

Out of the total sample (400 online mystery shops, including both TOC and Third Party Retailing websites), only in two cases was the shopper unable to successfully complete a ticket purchase.

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

Very few mystery shoppers expressed a lack of confidence in having obtained the correct ticket for their journey. 58% were “very confident” and a further 37% “fairly confident” that their ticket was correct.

Those buying from Long Distance operator websites were most confident in their purchase; 65% of this group were “very confident” in the outcome.

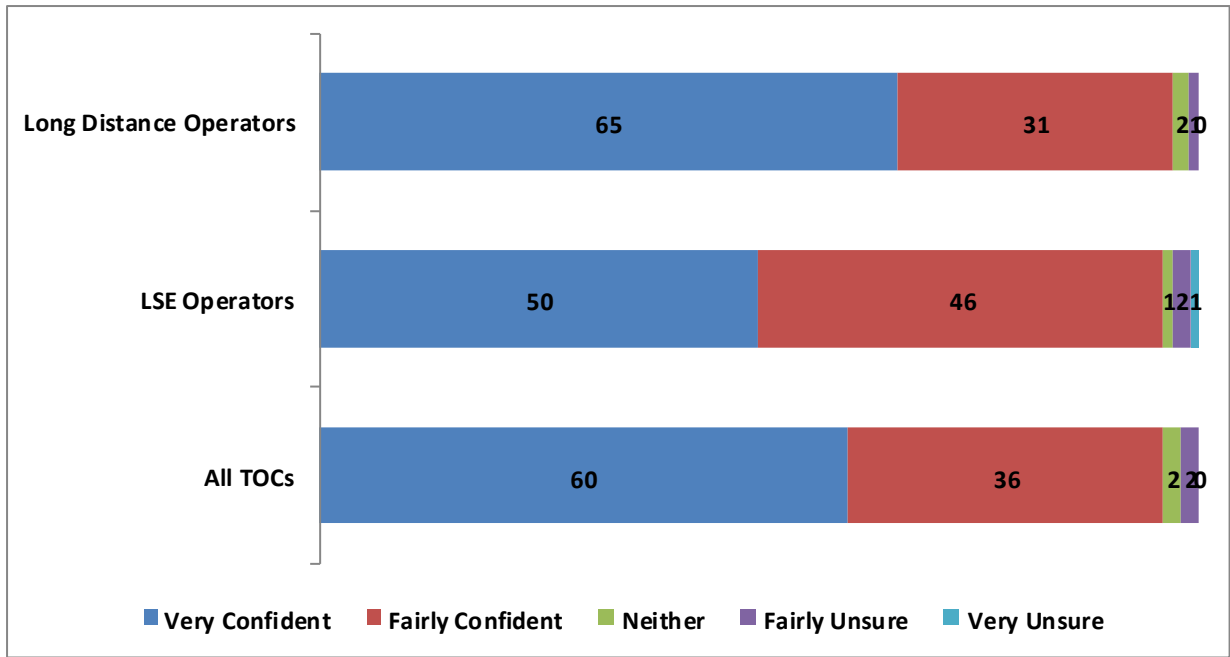


Figure 27 – Confidence in Getting the Correct Ticket by Retailer Category

As illustrated previously in respect of the information on ticket types, the Travelling with Child scenario is clearly the one which causes most confusion in the mind of the mystery shoppers. Only approximately one third of purchasers were “very confident” that they had purchased the correct ticket in this scenario, compared with comparable figures of 57% or higher for all other scenarios.

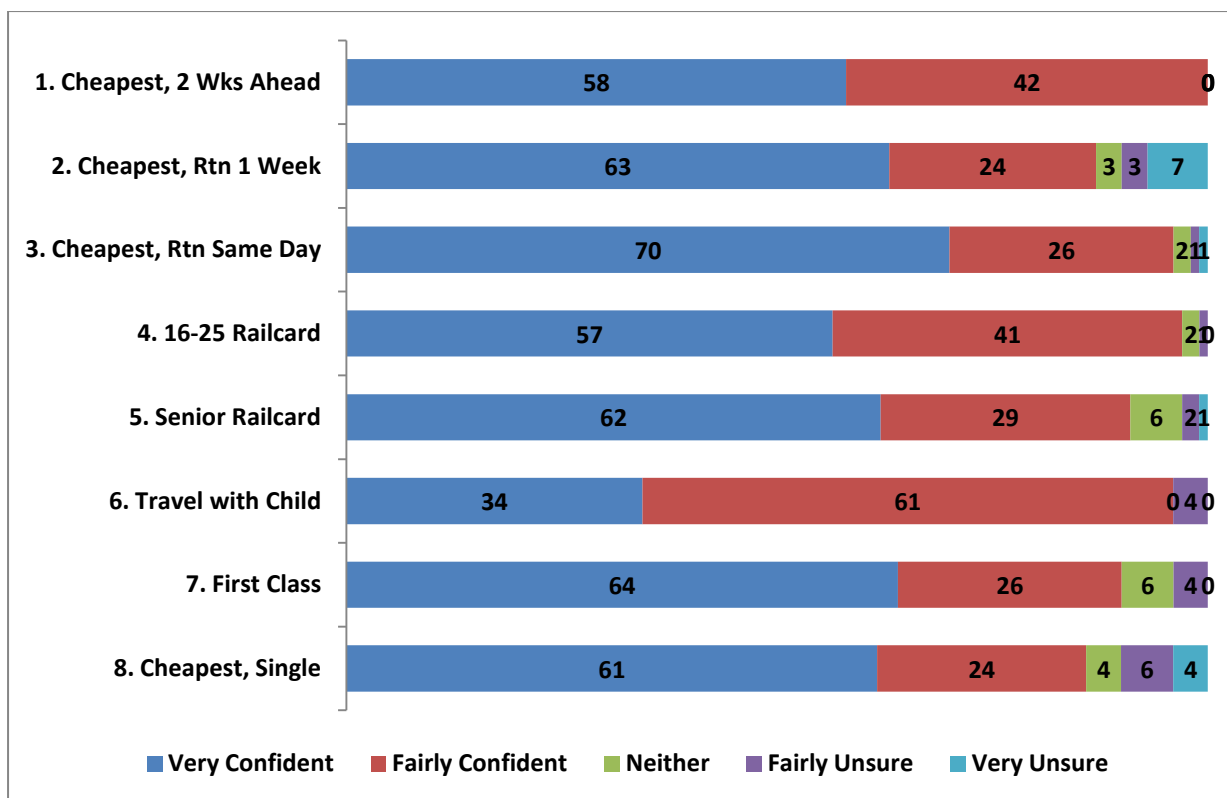


Figure 28 – Confidence in Getting the Correct Ticket by Scenario

As is to be expected, the group of shoppers with the least experience in purchasing rail tickets online had the lowest average confidence levels; only 45% of this group were “very confident”, versus 58% for the overall sample.

5.7.3 Was the Correct Ticket Purchased?

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

There was no significant variation by retailer category, although those purchasing from London & South East operator websites were slightly less successful than others.

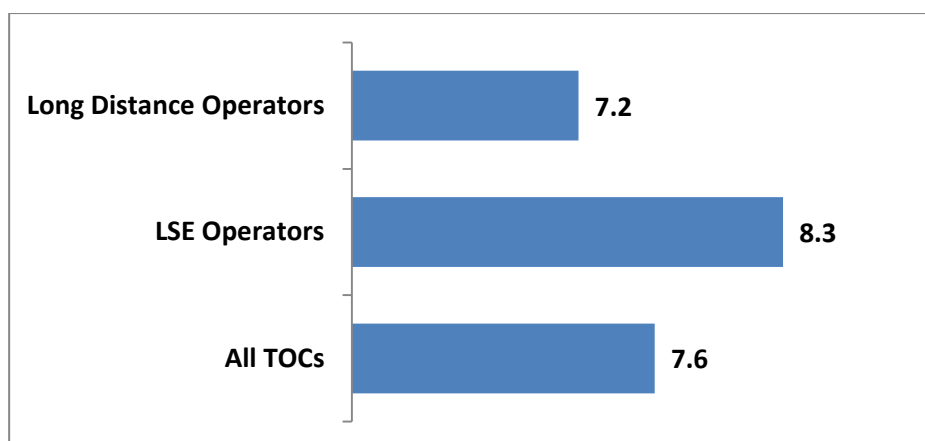


Figure 29 – Correct Ticket Purchased by Retailer Category

Shoppers proved successful obtaining the correct ticket in the majority of scenarios. Perhaps surprisingly given the lack of confidence on the part of the shoppers, Scenario 6 (Travelling with Child) was not one of the lowest scoring scenarios. The scenarios most likely to generate an incorrect ticket were Scenario 2 (Cheapest Ticket, Return 1 Week Later) and Scenario 3 (Cheapest Ticket, Return Same Day).

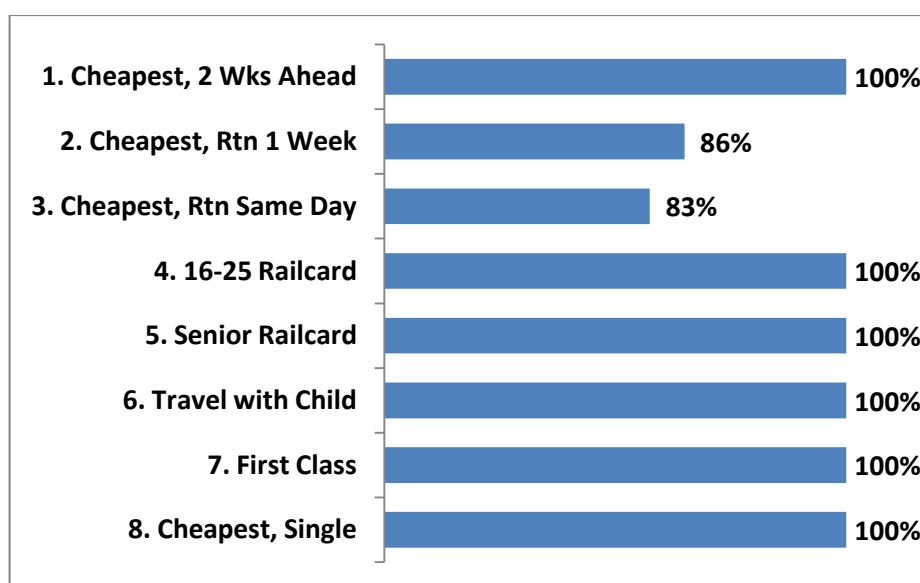


Figure 30 – Correct Ticket Purchased by Scenario

Both online shopping experience in general and experience in purchasing rail tickets online were not seen to influence a successful outcome.

5.8 Opinions of the Website

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

The large majority of mystery shoppers were satisfied with all aspects of the websites used. Amongst the sample as a whole, the highest satisfaction levels were expressed with the Speed and Security of

the ticketing websites, whereas users were less satisfied with Overall Design, Ease of Use and Efficiency.

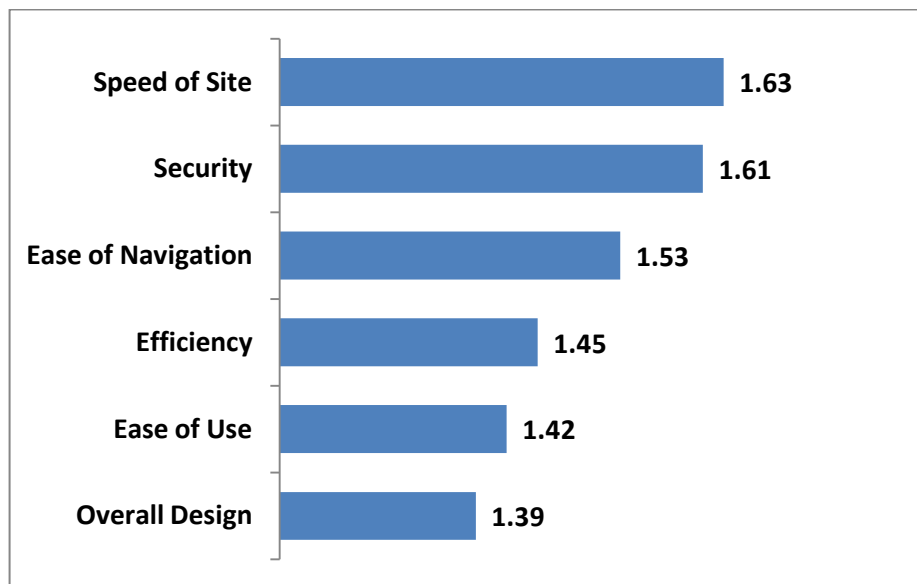


Figure 31 – Satisfaction with Aspects of the Website (Mean Score) – Total Sample

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

In respect of most aspects, there was little to choose between the retailer groups. However, TOC websites achieved a significantly higher satisfaction score than third party websites for Efficiency (64% of those using TOC sites were “very satisfied” with this aspect, versus 53% for third party retailers); while in terms of the Overall Design of the site, Long Distance Operators significantly outscored both London & South East operators and third party retailers (64% of those using Long Distance operator sites were “very satisfied” with the overall design, versus 47% for third party retailers and 40% for London & South East operator sites).

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

In terms of overall likelihood to recommend the website, London & South East operator sites and those of Third Party retailers scored significantly higher than Long Distance operator websites.

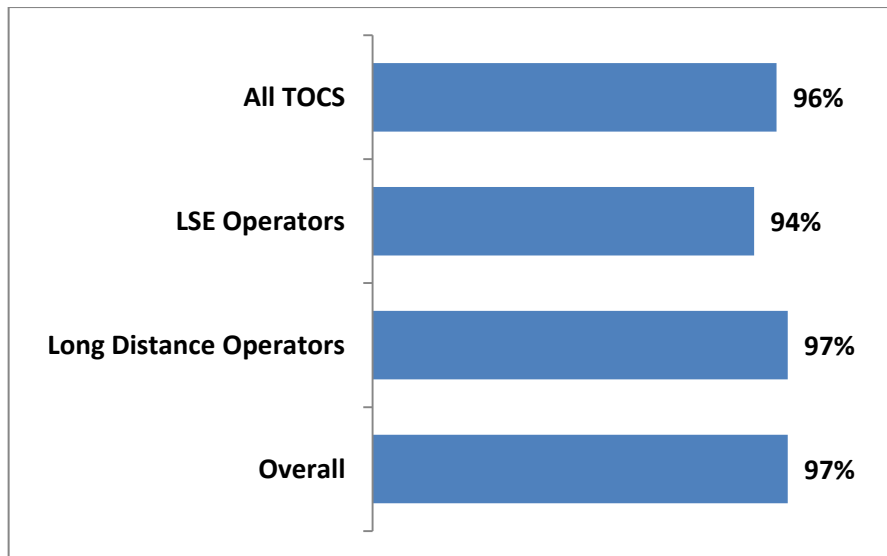


Figure 32 – Likelihood of Recommending Website (Mean Score) – By Retailer Category

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 Railcard scenarios, both Scenario 5 (Senior Railcard) and Scenario 4 (16-25 Railcard). The lack of confidence referred to previously amongst those conducting Scenario 6 (Travel with Child) is born out in the relatively low likelihood to recommend amongst this group.

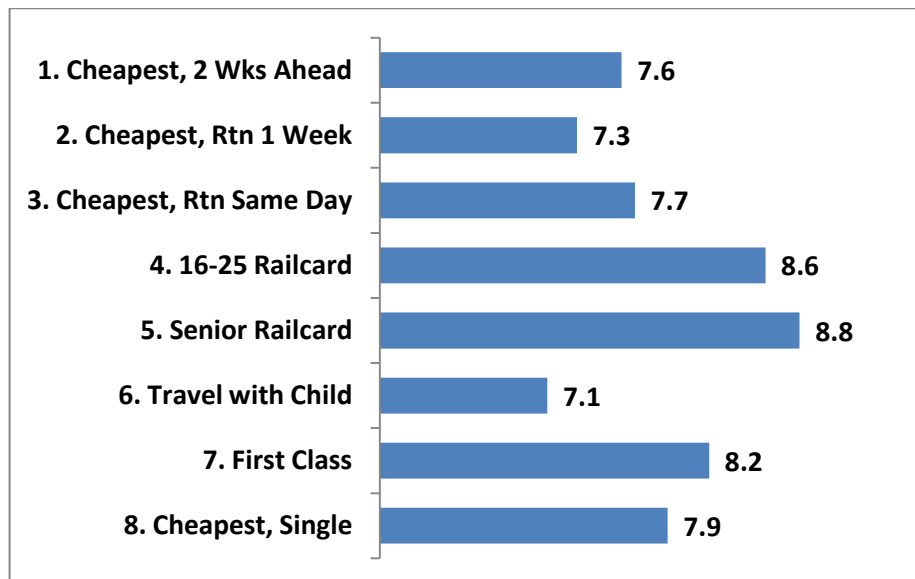


Figure 33 – Likelihood of Recommending Website (Mean Score) – by Scenario

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

Note: Net Promoter Score (NPS) calculations, in which Detractors (scoring 0 to 6) are subtracted from Promoters (scoring 9 or 10) to give a net NPS figure, were conducted, but the results mirror the patterns in the mean score results, so are not included in this report.

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

When comparing the rail ticketing websites with others they had experience of, the mystery shoppers were generally positive. 63% of shoppers responded positively (saying this site was “the best”, “better than most” or “better than some”), while only 14% gave a negative answer (commenting that the site was “worse than some”, “worse than most” or “the worst”).

Those using Long Distance operator websites were the most enthusiastic, giving significantly more positive feedback than those using both London & South East operator and third party sites.

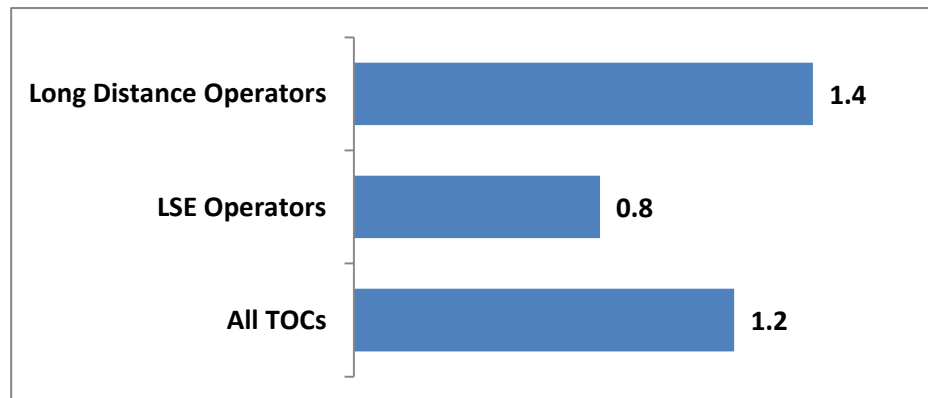


Figure 34 – How Website Compares with Others (Mean Score) by Retailer Category

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 compare the site favourably to others were those conducting the Railcard scenarios, both Scenario 5 (Senior Railcard) and Scenario 4 (16-25 Railcard), and also Scenario 1 (Cheapest Ticket, Travel 2 Weeks Ahead). Those conducting Scenario 6 (Travel with Child) and Scenario 2 (Cheapest Ticket, Return in 1 Week) were the least positive in their comparisons.

Encouragingly, the group of mystery shoppers who shop online most often were the significantly more enthusiastic about the rail websites. Only 7% of this group compared the rail website less favourably than other sites, versus 14% for the sample as a whole.

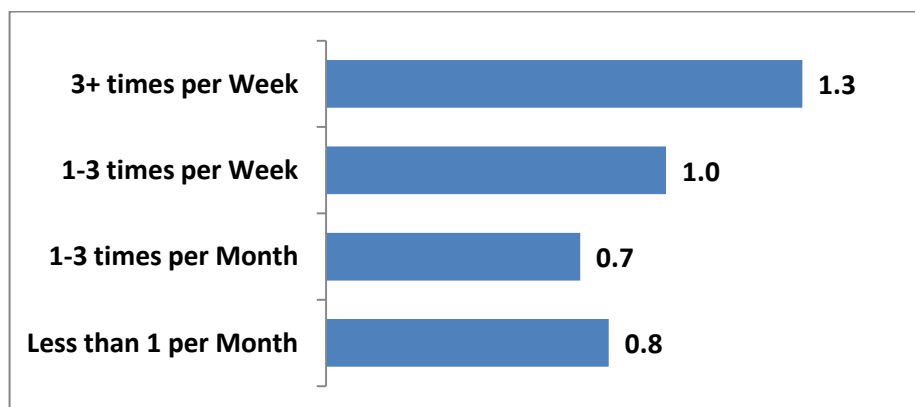


Figure 35 – How Website Compares with Others (Mean Score) by Frequency of Shopping Online

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

5.9 Receipt of Tickets

5.9.1 Was Your Ticket Available to Collect?

In only 1% of cases in which tickets were to be collected from a Ticket Vending Machine or Ticket Office, were the tickets not available for the mystery shopper to collect as planned.

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

In instances where tickets were delivered to the mystery shopper at home, delivery took place in one or two days. There were no cases in which delivery failed or took longer than two days.

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