



Southern Railway mystery shopping study
September 2007

Foreword

Passenger Focus commissioned independent market research agency FDS International Ltd to undertake a pilot mystery shopping exercise across the Southern Railway network in March 2007. The aims of the research were to utilise the findings to identify areas of improvement for Southern's passengers, along with identifying lessons to be learnt for any future mystery shops.

The National Passenger Survey (NPS) carried out by Passenger Focus asks passengers to rate in excess of 30 different service attributes, ranging from the punctuality and reliability of trains, to the cleanliness of stations. Data from NPS is very useful in monitoring changes in passenger satisfaction over time.

However, the NPS does have its limitations; whilst indicating where aspects of service are rated low or are declining it does not provide detailed reasons or explanations as to why passengers gave the rating that they did.

We hope that this research will help inform the refranchising process of the Southern network in 2009, along with acting as a useful guidance tool for any future mystery shop research on the UK rail network.

This work was funded by Passenger Focus and undertaken in partnership with Southern Railway.

Executive summary

Passenger Focus commissioned independent market research agency FDS International Ltd to undertake a mystery shopping exercise across the Southern Railway network in March 2007. The project was undertaken in partnership with Southern, with the aim of utilising the findings to identify areas of improvement for Southern's passengers, along with identifying lessons to be learnt for any future mystery shops.

A further aim of the research entailed evaluating the extent to which a mystery shopping exercise could provide insights into the customer satisfaction scores currently available via the National Passenger Survey (NPS).

Our mystery shops found that Southern, as reflected by their relatively strong performance in the NPS, are generally performing well:

- Punctuality is generally strong. Only four percent of trains departed from the station being assessed more than five minutes after the time specified in the timetable.
- Queuing times for purchasing a ticket were generally short. The average queue time at ticket windows was just less than one and a half minutes.
- At stations and on trains, staff were very polite and willing to help.
- Information for passengers whilst using stations and trains was generally of a high standard. Almost all assessments found electronic indicator boards, PA announcements, network maps, and timetables present. These were all in good condition.
- Eight in ten of Southern's stations were rated as looking like new or being in good condition. Furthermore, incidents of graffiti and litter were rare, especially on Southern's trains.

Although the results are, for the most part, a positive reflection on the services and facilities provided by Southern, there are some areas where improvements may be possible:

Car parking and bicycle storage facilities

- Only half of the stations shopped had a car park, whilst those stations with car parks were either full or almost full on almost two thirds of occasions between Monday and Friday.
- A third of stations do not provide storage facilities for bicycles.

Ticket buying facilities at smaller stations

- Nearly four in ten of the smallest D/E/F category stations¹ had no ticket machines. Furthermore, at the smaller D/E/F stations, 10% of our shops found no ticket-office windows open at all.

Southern have indicated that they do not aim to open all station ticket-offices/windows at all times and therefore the findings of this part of the research is not surprising. It is therefore all the more important that ticket machines are available and working at the smaller stations so passengers can buy their tickets if ticket offices are not open.

Queuing times during off peak periods

- Although the average queuing times were generally short, during off-peak periods, around one in ten queue lengths was above the three-minute guideline of the 'Ticketing and Settlement Agreement' (TSA).

Overcrowding during the evening peak

- Our shops found that passengers' ability to find a seat was dependent on the time of day. On one in 20 shops, all seats were occupied making passengers stand on the trains. This increased significantly to over one in five shops in the evening peak.

Cleanliness of train windows and toilets

- Nearly half of train windows received a mediocre score for cleanliness whilst a further one in ten had extensive amounts of dirt on them.
- A fifth of the train toilets assessed were very dirty.

Accuracy of information provided by station staff

- Nearly a quarter (23%) of ticket-office staff didn't know that there would be engineering works on a specific day between Victoria and Chichester. Furthermore, just fewer than one in ten ticket-office staff didn't know which platform the next train to a given station departed from.

Provisioning at station toilets

- In a quarter of the station toilets there was no soap available and in a fifth of cases, no toilet paper was present.

Chewing gum

- A build up of chewing gum was found at a fifth of stations. In the majority of cases, this was specifically on the platforms.

¹ Network Rail rates stations into six categories, A-F. Category A stations are the largest, with most facilities (e.g. London Victoria), whilst category F are the smallest, with fewest facilities (e.g. Belmont).

Introduction

Passenger Focus carries out the National Passenger Survey (NPS) in the spring and autumn of each year. The NPS provides passenger satisfaction ratings of each individual journey experience for many aspects of service such as 'the cleanliness of the inside of the train' and 'facilities for car parking'. Data from NPS is very useful in monitoring changes in passenger satisfaction over time. Please see Appendix A for Southern's spring 2007 NPS results.

However, the NPS does have its limitations; whilst indicating where aspects of service are rated low or are declining it does not provide detailed reasons or explanations as to why passengers gave the rating that they did. Mystery shopping provides a method of collecting very detailed observations of service aspects to help understand why passengers provide the ratings that they do. For example, the mystery shopper can objectively rate the presence of litter, surface dirt, ground-in dirt, chewing gum, graffiti and the condition of the interior fixtures and fittings of the train which could all impact on the passenger perception of cleanliness.

Passenger Focus commissioned FDS to carry out a pilot mystery shopping exercise of Southern Railway. The pilot was a partnership between Passenger Focus and Southern Railway who were both keen to see if the mystery shopping exercise could provide insights above those currently available to help understand and address passenger issues identified in the NPS.

How was the mystery shopping carried out?

Throughout March 2007 a group of specially trained mystery shoppers employed by FDS International Ltd, an independent market research agency carried out 604 shops at stations and aboard trains to rate the facilities and services provided to rail passengers across the Southern Railway network. This ranged from car parking, cycle storage and queuing times at stations to toilet facilities and levels of graffiti and crowding on trains.

The mystery shoppers behaved like real passengers but recorded their shops in secret and in great detail. For example, the mystery shoppers would ask a member of staff at a ticket office a pre-determined question and rate that member of staff's response for politeness and helpfulness on a 0-10 scale: the range of options available to the mystery shopper included a score of ten for 'extremely polite and extremely helpful', a four for 'neutral/indifferent/took time replying' and a zero for 'rude and unhelpful'.

To help ensure standardised assessments between different mystery shoppers, two days of training at stations and on trains across the Southern Railway network were provided by FDS in liaison with Passenger Focus and Southern Railway staff. The

training enabled the mystery shoppers to familiarise themselves with the questionnaire along with how they would rate the different facilities and services.

Stations were generally sampled with probability in proportion to passenger volumes² but no single station accounted for more than 16 visits in total. This enabled a good spread of stations to be shopped without an over-emphasis on the largest stations to the detriment of the smallest stations on the Southern Railway network.

Aboard trains, the mystery shoppers covered seven of the nine routes operated by Southern Railway³. These included the Brighton Mainline, Metro, East and West Coastway services which enabled our shops to reflect the range of different trains that passengers' experience across the Southern Railway network.

Key findings

Stations

The mystery shoppers made 304 visits to stations. The following observations were made:

Car parking and bicycle storage facilities

The NPS for spring 2007 shows that passengers are not highly satisfied with car parking and bicycle storage facilities at Southern Railway stations. For example, only 43% of passengers are satisfied with car parking facilities, whilst only 45% are satisfied with bicycle parking facilities.

Our mystery shoppers found that only half of the stations shopped had a car park. Car parks at stations were either full or almost full in nearly two thirds (63%) of occasions between Monday and Friday.

Bicycle-storage facilities were more common than car parks: two thirds of shops found a bicycle shed present and there was almost always a place to store another bike. That does, however, leave a third of stations without bicycle-storage facilities a place to store a bicycle. Where storage facilities were present, in almost half of cases the shoppers noted that the area was not clearly signposted and/or not well lit. This perhaps reflects the 31% of southern passengers who give a poor rating to bicycle storage facilities at Southern stations.

² Office of Rail Regulation (2007): *Station footfall numbers*

³ <http://www.southernrailway.com/routes.php>

Ticket buying facilities

Two thirds (65%) of passengers are satisfied with ticket buying facilities across the Southern network, according to the NPS. Our mystery shoppers observed the presence and working order of ticket machines and the availability and queuing times at ticket-office windows.

Only one in ten ticket machines were found to be out of order. However, passengers are far more likely to be unable to use a ticket machine at Southern's smaller stations: nearly four in ten (38%) of the smallest D/E/F category stations had no ticket machines.

All stations had a ticket office. The larger stations had more ticket windows compared to the smaller stations. The availability of the windows to purchase a ticket was generally good. In a third of shops, all windows were open while a further 41% found between half to three quarters of the windows open. In 10% of shops, no windows were open; these were concentrated almost entirely at the smaller D/E/F stations.

Coupled with the fact that many D/E/F stations didn't have ticket machines, this helps to explain why some passengers do not give a positive satisfaction rating for ticket buying facilities. Southern have indicated that they do not aim to open all station ticket-offices/windows at all times and therefore the findings of this part of the research is not surprising.

The 'Ticketing Settlement Agreement' states that queues for buying a ticket should not exceed:

- five minutes in peak periods
- three minutes in all off-peak periods (including weekends).

The mystery shoppers found that the average queue time at ticket windows was just less than one and a half minutes. However, queue times are longer at the larger stations. Waits at category A type stations are almost three minutes on average, while at category D/E/F stations, they are only 50 seconds.

The queuing times indicate that Southern is better at meeting its queuing-time targets during peak periods than those during the off-peak. In the peak periods, no more than six percent of queue lengths were above the five-minute guideline as set out in the 'Ticketing Settlement Agreement'. However, around one in ten queue lengths exceeds the three-minute guideline for off-peak periods.

Station staff

Passenger satisfaction in the NPS towards staff at Southern stations varies: only 51% are satisfied with the availability of staff whilst 66% are satisfied with the attitudes and helpfulness of staff.

The availability of staff was dependent on the size of the station: our mystery shoppers found that there were more staff at the larger stations than the smaller ones.

Southern staff, both on the platform and in the ticket offices were rated for their helpfulness and politeness by being asked a pre-determined question by the mystery shoppers. The majority of questions to station staff were answered correctly. However, there are some areas needing improvement. Nearly a quarter (23%) of ticket-office staff didn't know that there would be engineering works on a specific day between Victoria and Chichester. Furthermore, just fewer than one in ten ticket-office staff didn't know which platform the next train to a given station departed from.

Over eight out of ten of staff was at least very polite/willing to help our mystery shopper with their query. Only six percent of our mystery shoppers found staff to be impolite/unhelpful.

Provision of Information

80% of passengers are satisfied with the provision of information about train times and platforms, according to the NPS. Almost all station shops found electronic indicator boards/TV screens (97%) and timetables (94%). Maps, timetables and other paper notices are generally in good condition: over 80% of maps, timetables and general notices were found to be in good condition on both platforms and the entrance halls of stations.

Electronic indicator boards and TV screens showing train departures were generally working perfectly: 92% and 98% were working perfectly in the entrance hall and platforms respectively.

Announcements over the PA systems at stations are also rated positively. In the vast majority of cases (93%), platform announcements could be heard easily. In every case, announcements were made in plain English and were free from jargon.

The only significant cause for concern for Southern about provision of information at stations relates to announcements when there is unplanned disruption. Southern are very good at informing passengers where and why a disruption is occurring. However, our mystery shoppers found that in over half (55%) of the instances of unplanned disruption, Southern's announcements did not inform passengers how long the train would be delayed.

Condition of stations

The mystery shoppers found the condition of the stations to be good. This fits with the above average (for London/South East train companies) NPS passenger satisfaction scores of 61% for the upkeep/repair of the station buildings and platforms and 67% for cleanliness of Southern stations. Almost eight in ten (79%) shops of Southern stations gave station buildings and platforms a rating for looking like new,

or being in good condition. However, four percent of shops found many badly damaged areas throughout.

Our mystery shoppers found no graffiti at all in over half (53%) their shops whilst only finding many incidents of graffiti in four percent of shops.

Only a minority of station platforms had litter bins (16%). Nevertheless, Southern generally controls the amount of litter throughout stations well; on average, the stations are generally clean throughout. However, just under one in ten (9%) shops found stations to be heavily littered throughout. This was largely found to be in the London area.

The level of embedded chewing gum appears to be the most significant problem affecting the cleanliness of Southern's stations. Whilst just under two thirds (63%) of shops found none or very little evidence of chewing gum around the station, just under a fifth (19%) found chewing gum heavily evident at stations. In the majority of cases, this was on the platform surface.

Trains

A total of 300 shops were made on trains. Mystery shoppers assessed the outside of the train as it pulled into the station, and then boarded a carriage at either the front, middle or back of the train (this was pre-determined). Our mystery shoppers then solely assessed the inside of the carriage that they had boarded.

The following observations were made:

Punctuality

The NPS rates 78% of passengers being satisfied with the punctuality of Southern's trains. Official punctuality figures indicate that nearly nine out of ten (89.2%)⁴ Southern trains arrive at their destination on time. Our mystery shoppers found that only four percent departed the station they alighted more than five minutes after the time specified in the timetable.

Condition of trains

81% of passengers in the NPS are satisfied with the upkeep and repair of the train (compared to the average of 69% for all London and South East train companies). Furthermore, passengers are generally satisfied with the cleanliness of trains: 77% are satisfied with the cleanliness of the inside of their train (compared to the average of 70% for all London and South East train companies) whilst 73% are satisfied with the cleanliness of the outside of their train (compared to the average of 64% for all London and South East train companies).

⁴ Network Rail (2007): *PPM statistics*.

Average punctuality (MAA PPM) up to April 2007 (rail period 0713). Punctuality defined as arriving at destination no later than five minutes of stated time.

Our mystery shoppers found Southern trains to be generally in good repair, clean and with low levels of graffiti and litter. For example, on average train exteriors were free from graffiti and very clean. Only one percent of trains were found to have excessive amounts of graffiti and only one percent had extensive dirt on the exterior of the trains.

Furthermore, inside the trains, seats were found to be in good condition: 63% were in excellent condition, whilst there were no reports of seats that were unrepaired, ripped or having cigarette burns on them. This corresponds with strong satisfaction from passengers in the NPS about the comfort of the seating area: just less than three quarters (74%) are satisfied (well above the average for train companies in London and the South East of 64%).

Graffiti and litter were also limited on the trains, with three quarters of trains having no interior graffiti at all, whilst only five percent had many incidents of graffiti. However, one in five trains had small amounts of litter in one area of a carriage whilst eight percent were heavily littered. The level of litter increased where one in ten mystery shoppers found no litter bins or litter bins that were overflowing. This was most prevalent on Southern's Metro services.

The provision of toilets on the trains is generally good. Just over half (54%) of our mystery shoppers found a toilet in their carriage or an adjacent carriage.

The cleanliness of the windows and toilets were poorly rated. Nearly half (45%) of windows received a mediocre score whilst a further one in ten (11%) had extensive amounts of dirt on them. Nearly a fifth (19%) of the toilets assessed was extensively dirty, which corresponds with only 42% of passengers being satisfied with toilet facilities according to the NPS.

Level of crowding in carriage

Passenger satisfaction for the level of crowding on Southern's trains is relatively good compared to other train companies. For example, nearly two thirds (63%) of passengers are satisfied that there is sufficient room for all passengers to sit/stand on Southern trains. This compares favourably to the average for trains in London and the South East of 56%. However, just under a quarter (23%) of Southern passengers are dissatisfied with the space to sit sit/stand.

Our mystery shopper's assessments found that generally the situation is good, although some passengers are losing out. For example, on the whole our shops found that passengers' ability to find a seat was dependent on the time of day. For example, in only five percent of shops were all seats occupied and with passengers standing. However, this rose significantly to over one in five (21%) during the evening peak.

Provision of information

Nearly three quarters (73%) of passengers are satisfied with the provision of information during the journey, according to the NPS. The majority of carriages assessed had a Southern network map (91%) and electronic indicator boards giving details of the train's route and calling points (85%). 94% of maps in carriages were also either in good or perfect condition.

Information provided over the train's PA system was also rated very well by our mystery shoppers. In the vast majority of cases (96%), our mystery shoppers could easily hear all, or most, of announcements.

However, in only just over a half (56%) of the carriages assessed were details of how to make a complaint found.

Train Staff

Only 32% of passengers are satisfied with the availability of staff on Southern's trains, according to the NPS. In only just over a quarter (27%) of shops did the mystery shoppers observe a member of staff pass through their carriage on their journey. In nine out of ten cases the member of staff passing through was a ticket inspector. This is perhaps not surprising given that many of Southern's trains are driver operated only and do not have a train crew.

Ticket inspectors were asked when the train was due to arrive at the mystery shopper's destination. In all but one case the correct answer was provided.

As well as being helpful in providing information, Southern staff were rated well for their politeness and helpfulness. In 95% of assessments, our mystery shoppers rated ticket inspectors as being generally polite and helpful. This corresponds with the generally good level of passenger satisfaction towards Southern's on-train staff: 69% of passengers are satisfied with the helpfulness and attitude of staff on the train, compared to the average of 54% for all trains in London and the South East.

Conclusions

In general, Southern performed well in the mystery shopping exercise. Much of the information collected is useful in helping to understand why passengers rate Southern as they do in the NPS.

A number of issues were raised during the research, such as the value of mystery shopping fixed assets. For example, there appears to be little value in mystery shopping bicycle-storage facilities at stations if such a database exists.

Another issue is that Southern may not be able to action some of the findings e.g. ticket-offices were closed at stations during some of the shops. Southern have made it clear that they do not plan or resource these offices to be open at all times. Therefore, the finding that ticket-offices were not open on some occasions is not particularly insightful. In any future projects, knowing what times a ticket office at a station should be open would prove more helpful.

The training of the mystery shoppers and piloting of the fieldwork was crucial to the success of the research. We recommend that these are necessary steps for any future mystery shopping exercise. Furthermore, it was particularly helpful to have staff from Southern involved in the training.

Passenger Focus will be using the insights gained from the mystery shopping study in discussions with Southern and the Department for Transport about delivering further improvements to facilities and services for the benefit of passengers. We hope that the research proves a useful tool in the forthcoming refranchising of the Southern Railway network in 2009.

Appendix A

Southern Railway National Passenger Survey Results, Spring 2007.

Sample size	1712
Overall Satisfaction	81%
Station - Ticket Buying Facilities	65%
Station - Provision Of Information About Train Times/ Platforms	80%
Station - The Upkeep/ Repair Of The Station Buildings/ Platforms	61%
Station - Cleanliness	67%
Station - Facilities And Services	48%
Station - The Attitudes And Helpfulness Of The Staff	66%
Station - Connections With Other Forms Of Public Transport	75%
Station - Facilities For Car Parking	43%
Station - The Overall Environment	60%
Station - Your Personal Security Whilst Using	57%
Station - The Availability Of Staff At The Station	51%
Station - How Request To Station Staff Was Handled	82%
Train - The Frequency Of The Trains On That Route	72%
Train - Punctuality/ Reliability (the Train Arriving/ Departing On Time)	78%
Train - The Length Of Time The Journey Was Scheduled To Take (Speed)	81%
Train - Connections With Other Train Services	68%
Train - The Value For Money For The Price Of Your Ticket	37%
Train - Cleanliness Of The Train	80%
Train - Up Keep And Repair Of The Train	81%
Train - The Provision Of Information During The Journey	73%
Train - The Helpfulness And Attitude Of Staff On Train	57%
Train - The Space For Luggage	45%
Train - The Toilet Facilities	42%
Train - Sufficient Room For All The Passengers To Sit/Stand	61%
Train - The Comfort Of The Seating Area	74%
Train - The Ease Of Being Able To Get On And Off	77%
Train - Your Personal Security Whilst On Board	70%
Train - The Cleanliness Of The Inside	79%
Train - The Cleanliness Of The Outside	73%
Train - The Availability Of Staff	32%
Train - How Well Train Company Dealt With Delays	31%

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