Interchange matters:
Interchange evaluation form

Guidelines for mystery shopping

N.B. This is a printable version of the evaluation form. If you would prefer to complete the form using the online version, please visit: https://www.surveymonkey.com/r/interchangematters

An interchange is a station or stop at which passengers can change from one mode of transport to another or within the same mode (e.g. from one train or Underground line to another; from one bus to another, or from a bus to a train).

As far as possible, please try to focus your evaluation on issues particularly relevant to people interchanging rather than the way in which non-interchange stations or stops would be used.

Each of the following sections deals with one particular aspect of the interchange. Depending on the size of the interchange, it takes approximately 30-60 minutes to complete the evaluation. This form is deliberately wide-ranging to help encourage you to consider every aspect of an interchange from the passenger perspective. It is based on the findings of our *Interchange Matters* report. If you are unable to complete all sections, simply complete the ones you think are most important. Specific questions are provided to help with your evaluation and guide you in your observations. Please provide an overall rating at the end of each section using the following scale:

5☆   Performs extremely well in all or most evaluation criteria

4☆   Good overall performance

3☆   Acceptable performance overall or good/poor in some areas

2☆   Poor overall performance with many areas for improvement

1☆   Unacceptable performance in all or most areas

A space for comments is provided next to many questions, at the end of each section and for an overall rating on the last page. Please use this to write anything that you feel is necessary to help understand the reason for your answers.

Each section also has a box for you to suggest any improvements that you think are required, based on your observations and evaluation.

Please be aware that you may be approached by station staff and asked to explain the reason for your visit. You might also be asked to 'sign in' with the station manager.

Name of the interchange

Date and time of visit (If you completed this over multiple visits, please include what you did when)

Did you visit during peak or non-peak hours?

Did you visit during a weekday or a weekend?

Please provide a brief description of the interchange and the travel opportunities the interchange offers. Please consider any train, bus, tram, ferry, cycle services that serve the interchange station.

N.B. Please consider the size of the interchange in your evaluation. A smaller interchange may not have the same type and amount of facilities as a larger interchange, such as cycle hire in remote locations or shops at smaller stations.

1. Accessibility

This section concerns step-free access, stairs, lifts and escalators. It relates to passengers who may have difficulty accessing transport, such as elderly passengers, those travelling with children or luggage, as well as those with mobility and sensory impairments.

Q1a

	Yes	No
Is there a step-free route from the street to all platforms?	☐	☐
Is there level access from all platforms to the train?	☐	☐

If the interchange is only partially step-free, please describe the situation.

………………………………………………………………………………………………

Q1b

If access is not step-free, approximately how many steps are there? (e.g. more or fewer than 5 steps)

	Yes	No	Comments
Is this the same to all platforms?	☐	☐	

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Inside the station

Q1c

	Yes	No	Comments
So far as you can see, are portable boarding ramps available for staff to use at all platforms?	☐	☐	
Is there tactile paving at the top and bottom of staircases?	☐	☐	
Are walking distances indicated (particularly where passengers need to leave the station or building)?	☐	☐	

Q1d

	Yes	No	Comments
Are staff visible?	☐	☐	
Are there signs indicating that staff are available to help?	☐	☐	

……………………………………………………………………………………………

Q1e
Are the following facilities accessible?

	Yes	No	Comments
Toilets	☐	☐	
Ticket window	☐	☐	
Seating (e.g. is access to seating step-free)	☐	☐	
Other facility _____	☐	☐	

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Outside the station

Q1f
Are the following transport links accessible for **all** passengers from the station entrance?

	Yes	No	Comments
Bus	☐	☐	
Taxi	☐	☐	
Other mode _____	☐	☐	

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Q1g

	Yes	No	Comments
Is the footway on adjacent streets clear and level (i.e. are kerbs dropped or carriageways raised)?	☐	☐	
Is there tactile paving at the edge of kerbs for crossings and junctions?	☐	☐	

	Yes	No	Comments
Is there a pedestrian crossing near the station entrance?	☐	☐	
Is it appropriate to the size of road?	☐	☐	
Is it light / signal controlled?	☐	☐	
Is the local area clear of clutter (railings, litter, free-standing advertising boards, etc.)?	☐	☐	

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Q1h
How would you rate the ease of access to the interchange and its surrounding area for:

	Good	Mixed	Poor
Wheelchair users or passengers with disabilities?	☐	☐	☐
People with pushchairs or luggage?	☐	☐	☐
Other passengers?	☐	☐	☐

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Thinking about all of the above, what is your overall rating for accessibility? N.B. It is not possible to award five stars in this category unless the interchange is step-free and has level access.

☐   5 ☆   Performs extremely well in all or most evaluation criteria

☐   4 ☆   Good overall performance

☐   3 ☆   Acceptable performance overall or good/poor in some areas

☐   2 ☆   Poor overall performance with many areas for improvement

☐   1 ☆   Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

2.   Layout

This section concerns the layout of the interchange. Please consider whether there are any obstructions to movement or visibility through the station or stop, as well as the location of staircases, lifts, ticket barriers, ticket offices, ticket machines, and exit / entry points.

Q2a

	Easy/ Good	Mixed	Poor
How easy is it to get into and out of the station (entrances and exits)?	☐	☐	☐
How easy is it to navigate / move around the station?	☐	☐	☐
Is it easy to find the platforms/stops?	☐	☐	☐

Comments

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Q2c

	Yes	No	Comments
Is movement difficult due to:			
Overcrowding (at the time of your visit)?	☐	☐	
Free-standing information or advertising boards?	☐	☐	
Shops, kiosks or other fixtures?	☐	☐	
Bottlenecks at the ticket gate?	☐	☐	
Is what is on either side of barriers (e.g. travel information, facilities) clearly indicated?	☐	☐	

Thinking about all of the above, what is your overall rating for layout?

☐	5 ☆	Performs extremely well in all or most evaluation criteria
☐	4 ☆	Good overall performance
☐	3 ☆	Acceptable performance overall or good/poor in some areas
☐	2 ☆	Poor overall performance with many areas for improvement
☐	1 ☆	Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

3.   Information, signage and onward journeys

In this section, consider the quality, quantity and visibility of travel information, signs, maps, and information provided to passengers about their onward journey. Please consider both inside and outside the ticket gates.

Q3a
Please indicate whether the following are available, easy to find and easy to see. Consider whether information and signage is obscured by advertising or any other irrelevant materials.

	Available	Easy to find	Easy to see from afar
Timetables	☐	☐	☐
Departure / arrival boards	☐	☐	☐
Service update ('Rainbow') screens	☐	☐	☐
Directional signage to platforms and stops	☐	☐	☐
A station plan	☐	☐	☐
Lines on the floor indicating routes to key facilities	☐	☐	☐
Information about which exit to use for onward journeys shown at all exits	☐	☐	☐
Maps showing London's Rail and Tube services	☐	☐	☐
Route maps on all platforms showing the stations served by services at that platform	☐	☐	☐
Bus maps	☐	☐	☐
Local area maps	☐	☐	☐

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Q3b

	Yes	No	Comments
Is there a staffed information point?	☐	☐	
Are help points available?	☐	☐	
Is the public address system clear and audible?	☐	☐	
Is there any indication that WiFi is provided?	☐	☐	

Q3c

	Yes	No	Comments
Does signage make clear the direction of travel of buses, trains and trams?	☐	☐	
Do all nearby bus stops have live bus arrivals information screens?	☐	☐	
If applicable, is information about engineering works clearly displayed at an appropriate location?	☐	☐	

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Q3d

	Yes	No	Comments
Is it easy to see and find the station from all surrounding streets?	☐	☐	

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Thinking about all of the above, what is your overall rating for information, signage and onward journeys?

☐   5 ☆   Performs extremely well in all or most evaluation criteria

☐   4 ☆   Good overall performance

☐   3 ☆   Acceptable performance overall or good/poor in some areas

☐   2 ☆   Poor overall performance with many areas for improvement

☐   1 ☆   Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

4.   Facilities

This encompasses any facilities found within or around the interchange such as car parking, cycle parking, taxi ranks, retail units, toilet facilities etc.

Q4a

	Yes	No	Comments
Are there toilets?	☐	☐	
Are they inside or outside the ticket barriers?			
What does it cost to use the toilets?			
If there is a cost to use the toilets, is a change machine provided next to them?	☐	☐	
Is there a toilet attendant?	☐	☐	
Are the gates to the toilets wide enough to accommodate luggage?	☐	☐	
Are the toilets clean?	☐	☐	
Are the toilets fully stocked (e.g. soap, hand-drying facilities, toilet paper)?	☐	☐	
Are the cubicles a reasonable size?	☐	☐	
Do they have a shelf or a hook?	☐	☐	

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Q4b

	Yes	No	Comments
Is there a waiting room?	☐	☐	
Is there a waiting room on all platforms?	☐	☐	
Is there a sheltered area on all platforms?	☐	☐	
Are there enough seats?	☐	☐	
Are there vending machines?	☐	☐	
Is there a café or refreshment kiosk?	☐	☐	
Are there any other shops or kiosks?	☐	☐	
Are the shops / kiosks appropriate to the size of the interchange?	☐	☐	

	Yes	No	Comments
Are there cycle parking facilities?	☐	☐	
Is the cycle parking secure?	☐	☐	
Is cycle hire available?	☐	☐	
Is there a car park at the station?	☐	☐	
Is there a car park near by?	☐	☐	
Is it easy to pay for car parking?	☐	☐	
Is there a drop off point beside the station entrance?	☐	☐	
Is there a taxi rank nearby?	☐	☐	
Is there a mini cab office?	☐	☐	
Is there a cash machine?	☐	☐	
Are the available facilities above clearly visible, signed and easy to find?	☐	☐	

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Q4c
Please note any other facilities not listed above

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Thinking about all of the above, what is your overall rating for facilities?

☐   5 ☆   Performs extremely well in all or most evaluation criteria

☐   4 ☆   Good overall performance

☐   3 ☆   Acceptable performance overall or good/poor in some areas

☐   2 ☆   Poor overall performance with many areas for improvement

☐   1 ☆   Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

5.   Interchange environment

This section relates to the overall environment at the interchange. It considers whether the station has a pleasant environment (especially if passengers need to spend time there while waiting for a connection). This takes into consideration issues such as cleanliness, litter, etc.

Q5a

	Yes	No	Comments
Is there any graffiti?	☐	☐	
Is the graffiti offensive?	☐	☐	
Is the station clean and tidy?	☐	☐	
Is there any litter on the platforms?	☐	☐	
Has the station been swept (as opposed to having been simply litter-picked)?	☐	☐	
Is there any litter on the track-bed?	☐	☐	
Are enough bins provided?	☐	☐	
Does the station seem to be cared for?	☐	☐	

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Q5b
Do you have any other concerns about the overall environment of this interchange?

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Q5c
Does this feel like the sort of place you would feel comfortable spending time at, if necessary?

Thinking about all of the above, what is your overall rating for the travelling environment?

☐	5 ☆	Performs extremely well in all or most evaluation criteria
☐	4 ☆	Good overall performance
☐	3 ☆	Acceptable performance overall or good/poor in some areas
☐	2 ☆	Poor overall performance with many areas for improvement
☐	1 ☆	Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

6.   Staff

This section provides an assessment of staff presence at the interchange.

Q6a
Are you able to see staff:

	Yes	No	Comments
On the concourse?	☐	☐	
At the ticket office and / or machines?	☐	☐	
At the ticket gates?	☐	☐	
On the platforms?	☐	☐	

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Q6b

	Yes	No	Comments
In your opinion, are there enough staff members for the number of passengers in the station?	☐	☐	

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Q6c
Are there enough ticket office windows and ticket machines available? Please consider the queues and amount of waiting time to use these.

	Yes	No	Comments
Ticket office windows	☐	☐	
Ticket machines	☐	☐	

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Q6d
If the station has a ticket office, when is it open?

Q6e
How helpful / knowledgeable are members of staff?
Ask a member of staff a question relating to the interchange (e.g. how to get to the local high street or hospital) and record the answer given in the box below.

	Yes	No	Comments
Is the information provided correct, as far as you can tell?	☐	☐	

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Thinking about all of the above, what is your overall rating for staff?

☐ 5 ☆ Performs extremely well in all or most evaluation criteria

☐ 4 ☆ Good overall performance

☐ 3 ☆ Acceptable performance overall or good/poor in some areas

☐ 2 ☆ Poor overall performance with many areas for improvement

☐ 1 ☆ Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

7.   Personal security

This section is intended to assess how safe and secure a passenger is likely to feel when using the interchange.

Q7a

	Yes	No	Comments
Is the area around the station (e.g. passageways, car parks, etc.) well lit for connections and onward travel needs?	☐	☐	
Is the station isolated (as opposed to being adjacent to a busy thoroughfare)?	☐	☐	
Is the station well lit throughout, particularly subways and platforms?	☐	☐	
Is platform access controlled by ticket gates?	☐	☐	

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Q7b

	Yes	No	Comments
Are there CCTV cameras in and around the station?	☐	☐	
Did you notice any anti-social behaviour during your visit?	☐	☐	

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Q7c
Do you have any other comments about personal security at this station?

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Thinking about all of the above, what is your overall rating for personal safety?

- [ ]   5 ☆   Performs extremely well in all or most evaluation criteria
- [ ]   4 ☆   Good overall performance
- [ ]   3 ☆   Acceptable performance overall or good/poor in some areas
- [ ]   2 ☆   Poor overall performance with many areas for improvement
- [ ]   1 ☆   Unacceptable performance in all or most areas

Reasons for rating given and suggestions to improve rating

Overall rating for this interchange

☐   5 ☆   Performs extremely well in all or most evaluation criteria

☐   4 ☆   Good overall performance

☐   3 ☆   Acceptable performance overall or good/poor in some areas

☐   2 ☆   Poor overall performance with many areas for improvement

☐   1 ☆   Unacceptable performance in all or most areas

Thank you for taking the time to complete this form on behalf of your fellow transport user.

What to do now:

Talk to the operator who runs the station about any particular concerns you have identified.

Although London TravelWatch does not have the resources to follow up on every individual survey, we nevertheless would be very interested to know what you find. Please send us a copy of your completed form or, preferably, input your answers directly into the online survey form which can be found at: https://www.surveymonkey.com/r/interchangematters

We are compiling a database of this feedback, which we will use to help prioritise our ongoing work to help improve the experience of interchanging on public transport in London.

If you wish to leave your email address and/or telephone number with us, we will not share these details with anyone, however we might get back to you with any queries arising from your answers or in connection with any other aspects of our work we think you might be interested in.

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