

## Smart ticketing in the north: what do passengers think?

### Summary report



**Foreword** from  
Anthony Smith,  
chief executive

The Northern Powerhouse is intended to deliver improvements to make the whole of the north more prosperous.

One of the main ways in which this will be realised is through making improvements to transport, so that people will consider travelling further for employment and other reasons.

Addressing issues around fares and tickets is an important part of this, alongside making improvements to infrastructure and timetabling.

Transport Focus is delighted to be able to work with Transport for the North at the start of its ambitious programme to deliver improvements to passengers across the region. The end result should be to increase use of public transport for more journeys, and to make the experience of using public transport more efficient and enjoyable.

### Background

One of the aspirations of the Northern Powerhouse is to improve transport links between the city regions of the north.

It is believed this can, in part, be achieved through the introduction of a seamless smart ticketing scheme accessible across the region, for use on all modes of transport, with a standardised/simple fare structure.

In order to develop this aspiration for a northern-wide smart ticketing system, Transport for the North (TfN) must understand how such a system would look and how it could be integrated across the cities of the north.

We needed to carry out research to understand current perceptions of travel within the region, as well as understanding needs and wants from a smart ticketing system.

### What we wanted to find out

- To understand the current transport landscape in the north, the frequency of travel between cities or regions, for what reasons, and by what mode and method (public or private).
- To explore why people choose different types of transport for particular journeys.
- To understand passengers' overall experiences (positive, negative, frustrations with ticketing, journey planning and so on) of public transport and to spot the gaps, particularly in relation to ticketing.
- To gain a broad understanding of smart technology and a more specific understanding of attitudes towards smart ticketing schemes.

### How we did it

#### Two waves of research

##### Wave one in December 2015:

- 11 group discussions lasting two hours with passengers in urban locations around the north.
- online survey with 407 respondents living in the north.

##### Wave two in March 2016:

- 16 detailed interviews with passengers from the December focus groups.
- survey with 2000 northern respondents. 1720 interviews were online, and 280 were carried out face to face (for those without internet access at home).

All our smarter travel research can be found at:  
<http://www.transportfocus.org.uk/research/smarter-travel>

This is the latest report from our joint programme with the Department for Transport exploring passenger needs from smart ticketing.

# Key findings

## How people currently move around the north

**During our research we spoke to people from across the north east, north west, and Yorkshire and the Humber who use public transport at least once every three months.**

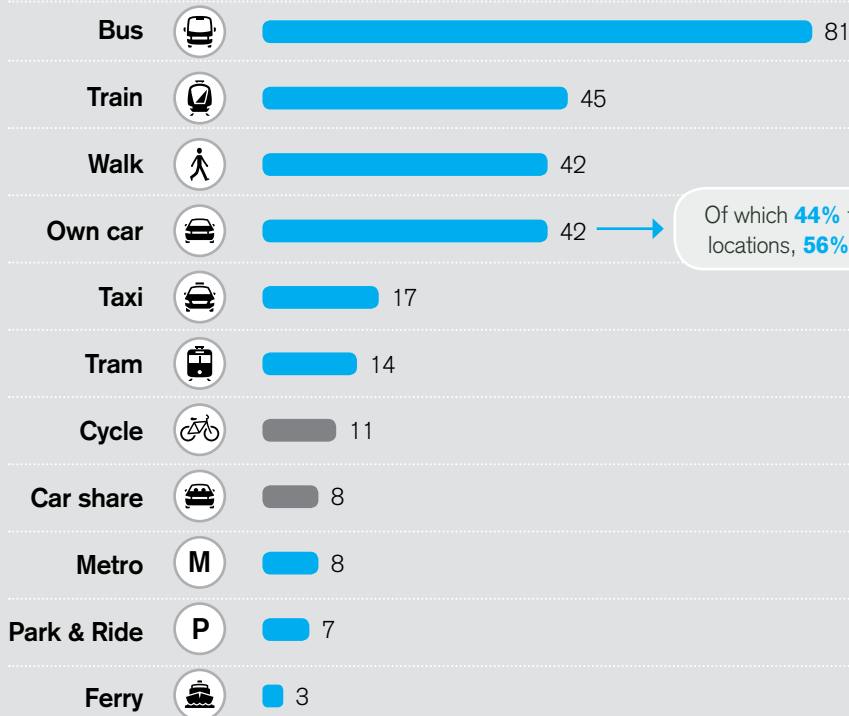
This represented 67 per cent of the population – with the remaining 33 per cent being screened out as they did not use public transport enough. Public transport users in the north make frequent journeys. 63 per cent of our main survey respondents use public transport on at least a weekly basis, with 31 per cent using it five or more days a week.

Single-mode ticketing (61 per cent) via a paper ticket (72 per cent) is the most common way for passengers to travel at present. Only a third of people we surveyed use multi-modal tickets; however this is higher among urban residents who are also more likely to use smart ticketing.

Bus is the most-used mode of transport with 81 per cent of respondents using it and 76 per cent of those taking the bus at least once a week. The next most commonly used mode was the train at 45 per cent.

### Modes of transport used and frequency

Q1 Which of the following modes of transport do you use? (%)



Of which **44%** from urban locations, **56%** from rural

#### AVERAGE FREQUENCY OF USE

Three days a week
Once a week
Five days a week
Four days a week
Twice a month
Once a week
Twice a week
Twice a week
Twice a week
Once a week
Twice a month

Average number of modes used: 2.8

Base: All respondents (n = 2000)

Satisfaction with modes of public transport ranges from 70 per cent of bus users to 86 percent of tram users. However, the level of satisfaction with using their own car or a car share is highest at 93 per cent satisfied, with the majority of those being 'very' as opposed to 'fairly' satisfied.

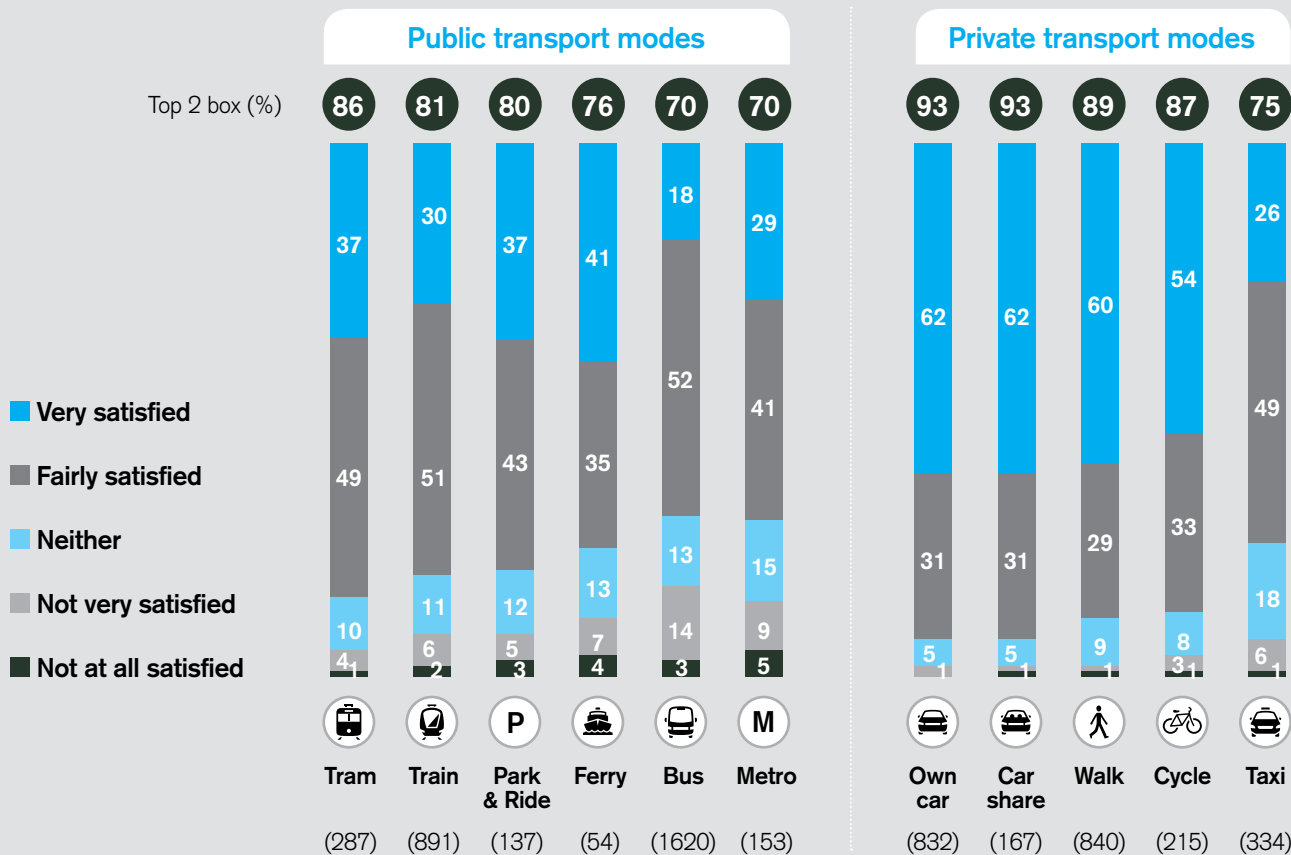
Of the commuters we spoke to, 67 per cent are making journeys of less than 30 minutes, to travel to work or education. The table shows the breakdown of all commuters in terms of the distance travelled and time taken. The two most common combinations are two to five mile journeys taking 10 to 20 minutes, and journeys of more than 10 miles taking more than 31 minutes.

Half the commuters use season tickets and the other half buy their tickets on the day.

Total %	< 10 minutes	10-20 minutes	21-30 minutes	> 31 minutes
< 2 miles	7	6	3	1
2-5 miles	3	14	10	6
5-10 miles	1	7	12	11
> 10 miles	0	1	5	15

## Satisfaction with modes used

**Q17** Thinking about the different modes of transport that you use, how satisfied are you with each mode for the different journeys that you make?



# What is known about the Northern Powerhouse?

Most respondents struggle to give an accurate description of the concept of the Northern Powerhouse. 61 per cent are aware of it in some way, but a sizeable minority are unable to describe what it is at all. When it came to transport there is a lot of confusion between developments on the HS2 project and the Northern Powerhouse.

Respondents were shown a list of potential changes which might occur as a result of the introduction of the Northern Powerhouse. The main benefits are seen to be economic, in terms of increased investment, along with better links to individual cities and towns in the north.

"In terms of travel, HS2 I suppose."

Manchester, leisure

Focus group participants felt the concept was difficult to argue with, but there was some cynicism as to whether it will deliver on its promises.

"It's like a local parliament, isn't it? It's like putting a bit of power locally, rather than it all being sort of central in London."

Sheffield, leisure

"The Northern Powerhouse could centralise the north I guess and make it stronger. I think it's good for the country and good for us up north."

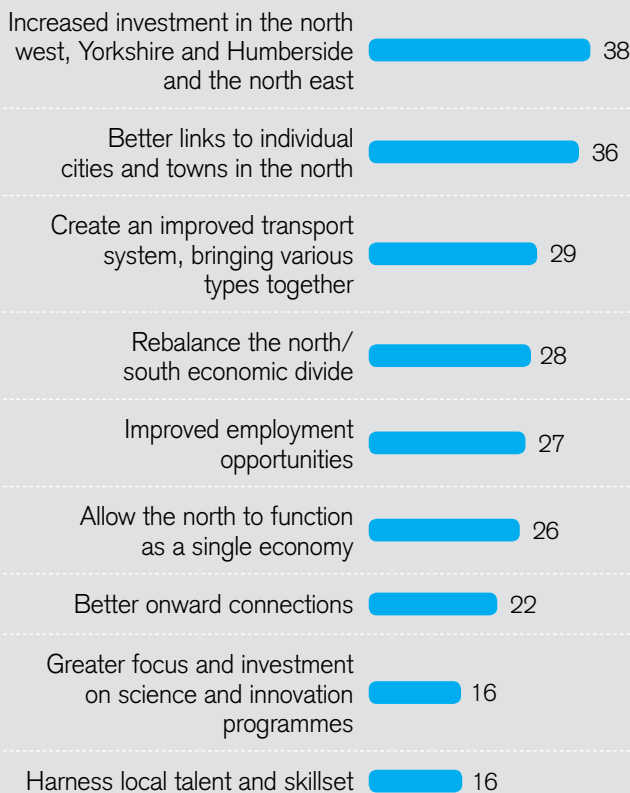
Leeds, leisure

"I'd be more inclined to socialise in other places rather than just Leeds. I'd go for a meal in Manchester or I'd go for a meal in Sheffield... you know, wherever, and just spread my wings a little bit more because it'd just be easier."

Leeds, leisure

## What do you think might change as a result of the Northern Powerhouse? (%)

Q49 (prompted list)



Base: All respondents (n = 2000)

# Increasing public transport use

## – current barriers and priorities

When we asked passengers what stops them from using public transport more, ticketing is not a key barrier. As we see in other research, cheaper fares, reduced journey time and more frequent and reliable services are all bigger priorities to passengers and would encourage further use of public transport.

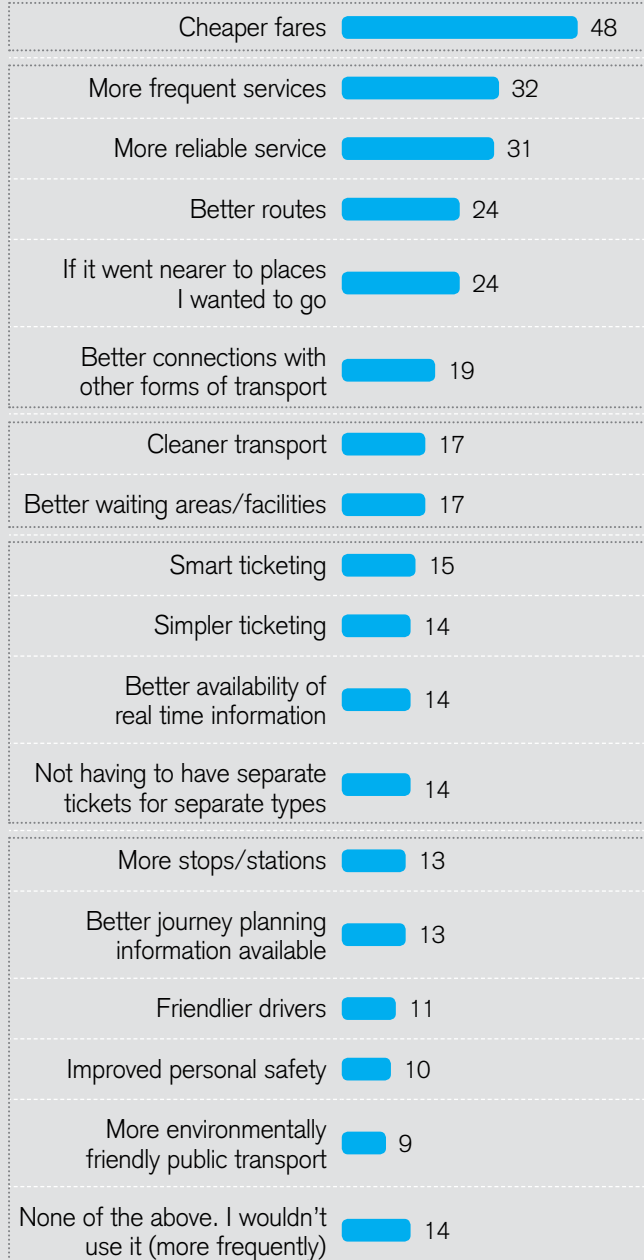
### What prevents people from using public transport more frequently than they currently do? (%)



Base: All respondents (n = 2000)

### Cheaper fares, service performance and environment rank ahead of ticketing as influences on use of public transport (%)

#### Q What would encourage you to use public transport more frequently than you are now? (prompted list)



Base: All respondents who could use public transport more (n = 2000)

# Smart ticketing – where does it fit?

Over half (57 per cent) are aware of smart ticketing and half of these have used it at some point.

"It might get round the need to find the right change and would also be useful at stations where there is no ticket office. I also envisage seamless transition between modes of transport."

Comment from online survey

"No need to worry about having the correct change for the bus. No problem with queuing for tickets, especially when you are tight for time. Also not having to worry about losing your return ticket."

Comment from online survey

"Not having to decide up front which modes or bus companies I want to use that day. Not having to queue to buy tickets at the station. Not having to argue with bus drivers about the validity of my ticket when it's something they don't recognise."

Comment from online survey

Half the respondents in the sample would be likely to use smart ticketing if it was introduced on the public transport that they currently use, with higher likelihood among:

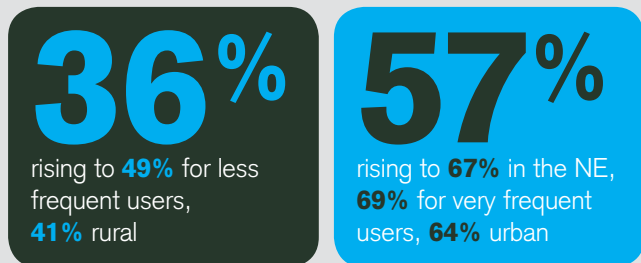
- full-time workers
- more frequent public transport users
- those aged under 50
- those who own a smartphone.

"Easier, more convenient, saves time, less paper, easier tracking of payments, no loss of ticket."

Comment from online survey

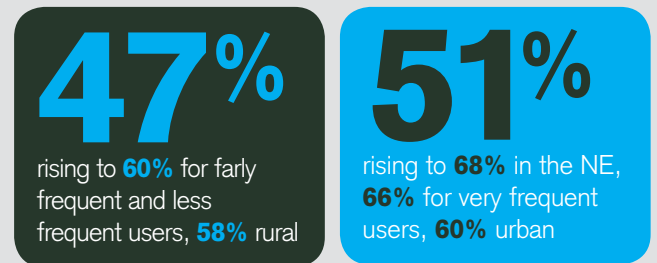
**Q19** Are you aware of smart ticketing as a concept to pay for travel on public transport or to store tickets on? (%)

Awareness



**Q20** Have you used any form of smart ticketing before either in the UK or abroad when travelling on public transport? (%)

Usage



■ No ■ Yes

Awareness and usage increase with frequency of public transport use as well as amongst full-time workers and those in urban locations.

Base: All respondents (n=2000)

Base: All respondents aware (n=1148)

## How smart ticketing would work

In terms of the mechanics of how smart ticketing would work, registration is expected and offers benefits around ease of use and peace of mind. The fact that personal data would be stored did not cause concerns, although some raised queries about whether some people would be excluded from being able to get smart ticketing because of this.

"You kind of expect to have to register for everything these days, and there are always positives to doing so."

Sheffield, leisure

"They should definitely provide some support to get the less savvy on board with registering - a helpline or something."

Liverpool, commuter

"I feel like companies that run public transport will be strongly firewalled and very good with people's data."

Leeds, commuter

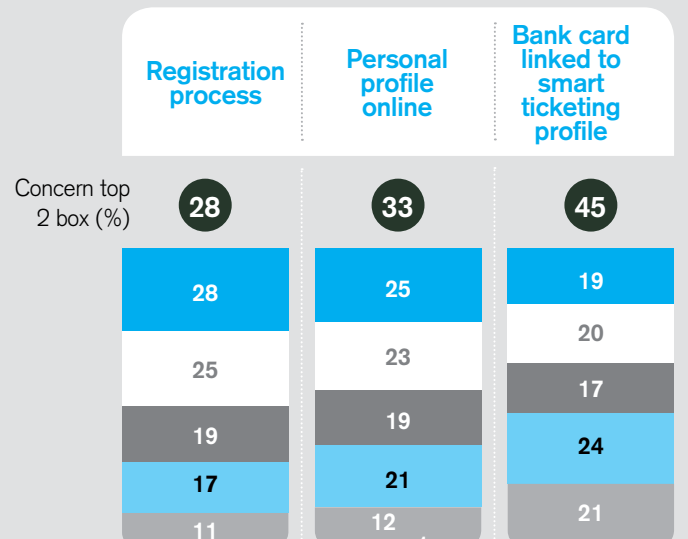
### The idea of having an online account is appealing and is felt to offer numerous benefits, mainly around convenience and simplification of ticket purchasing:

- provides opportunity for online ticket purchasing which is felt to be an overdue modernisation for those using trains or buses
- convenience: it is expected that ticket purchasing could be done anywhere/anytime, removing hassle of queuing at stations, finding a ticket office and issues with payment (such as needing correct change for buses)
- some are already purchasing across multiple channels including mobile
- other potential benefits:
  - possible 'loyalty' rewards
  - suggestions for faster/cheaper routes based on journey history recorded on account
  - easily view travel outgoing with tracked journeys and tickets (can be particularly useful for those claiming expenses for business/work).

Having a bank card linked to a smart ticketing profile raises more concern than registration or a personal profile, particularly amongst those in more rural locations. So clearer communication would be needed here around why it is needed and the benefits and reassurances in place – and ideally an alternative option would be available for those who are most reluctant.

### Having a bank card linked to your smart ticketing profile raises the greatest level of concern, particularly amongst those in more rural locations

Q28/Q29/Q30 How would you feel about this... (%)



A registration process that you would need to complete before you could use it

Setting up a personal profile so your details would be stored and travel securely recorded

Entering details of a debit or credit card to be linked to your smart ticketing profile

- Not at all concerned
- Slightly concerned
- Not really concerned
- Very concerned
- Neither/nor
- Don't have online access

Those who are concerned are more likely to be those without internet access at home, that don't own a smartphone and aged 60+

Base: All respondents (n=2000)



Being able to pay as you go (PAYG) is considered an important part of the smart ticketing scheme, with 60 per cent of respondents saying that this would be important to them. For some it is their assumption of how smart ticketing will work.

"This would give me reassurance and confidence in the smart ticketing system. It is easy to control and see what you are spending."

Comment from online survey

"I don't know how else it would work really, plus I already use this with the Oyster card when I go to London. It's intuitive."

Comment from online survey

"I like to keep track and know where my money is going. Pre-paying onto the card would be helpful so I don't have to think about paying each time I make a journey."

Comment from online survey

"So that I can keep track of how much I have spent and the money for the journey isn't coming directly from my bank account for each journey."

Comment from online survey

## The structure of fares

Passengers across the north hope for a standardised and ideally better-value fare structure. Most see a simplified fare structure, consistent across the region and modes, as a key benefit that will be delivered by a smart ticketing scheme.

- In the first phase of research it was expected that fares will be simpler and fairer as a result of unifying transport modes under one scheme.
- All would like to be reassured of best value for travel whilst using the system. Fare capping is considered a natural way to do this.
- A zonal payment structure appeals on the grounds of simplicity and ease of understanding. Many are familiar with this in London. It was felt that zones could be implemented in each city, stretching out across the entire north, with payment relating to the city zone that they were registered in (for example, where they live).
- There is support for the idea of rewarding loyalty through cheaper prices for frequent passengers. However some felt that, although a good idea, it could complicate pricing and cause confusion/misunderstanding, potentially undermining trust/confidence in the system.
- In the online survey 70 per cent said they find the principle of fare-capping attractive.

"If I'm able to easily understand how much my journeys will cost, it will give me peace of mind that there won't be any nasty surprises when I travel long journeys across different modes."

Sheffield, leisure

"I don't get why companies find it so difficult to just give you the best price. This scheme should just offer these from the start."

Sheffield, commuter

"Just set the pricing by zones, then everyone can look it up and see it and understand."










Hull, leisure





Ideally most would like a choice of payment type when they use smart ticketing. Smartcards are received positively, and are seen to provide an opportunity to promote the scheme, because of the branding and identity of the card. Smartphones are popular due to convenience and people's familiarity with such devices and their use in other sectors for managing purchases and accounts.

If they had to choose one of these as a first choice, 64 per cent would have a smartcard, 28 per cent a contactless payment card and eight per cent would choose a smartphone.

 <b>Smartphone</b>	 <b>Smartcard</b>	 <b>Contactless</b>
<p></p> <ul style="list-style-type: none"> <li>Smartphones are ubiquitous.</li> <li>Potential to create an app combining ticketing purchasing, discounts/offers and journey planning. Seen as a way of maintaining engagement with the scheme.</li> </ul> <p></p> <ul style="list-style-type: none"> <li>Technical problems: battery on the phone could die or not enough signal/data to access an app.</li> </ul>	<p></p> <ul style="list-style-type: none"> <li>Some of the tangibility of a separate card.</li> <li>Smartcards are becoming increasingly familiar and seen as easy to use.</li> <li>Distributing a separate and branded card could publicise the scheme.</li> </ul> <p></p> <ul style="list-style-type: none"> <li>Takes up wallet space.</li> <li>Potential of loss/theft.</li> <li>Some concerns over card not working/becoming damaged.</li> </ul>	<p></p> <ul style="list-style-type: none"> <li>Contactless is increasingly familiar.</li> <li>No need to worry about having correct money, or enough money, particularly if using credit card as payment.</li> </ul> <p></p> <ul style="list-style-type: none"> <li>Some concerns over security: unsafe to take bank card out at busy ticket barriers.</li> <li>Some concerns over transparency of ticket pricing.</li> </ul>
<p><i>"I rely on my phone. I'm quite comfortable using it to pay for things. I make sure it's sufficiently charged. (Of the three options) I prefer the phone."</i></p> <p>Leeds, commuter</p>	<p><i>"It's just a card isn't it? It's easy to slip into your purse, onto your pocket."</i></p> <p>Liverpool, commuter</p>	<p><i>"Contactless is a godsend because if you've forgotten to top up your Oyster you can use that and get in. The only thing that you don't really know, because you don't see it on the screen, how much it's costing you whether it's the same or not."</i></p> <p>Leeds, business</p>

## Card scheme branding

From the qualitative research, there was not a clear consensus on the extent to which the smartcard should be localised in terms of branding, and whether local or regional branding should dominate.

There were some reservations towards an overtly 'northern' branding, yet also a sense that there would need to be a single clear branding across the north to clearly communicate the purpose of the scheme.

Some felt that localised branding would encourage familiarisation of the scheme for users.

"They have to give it some sort of personality/identity so that people can relate to it and think 'Yes. This is a scheme that's going to work for me.'"

Leeds, leisure

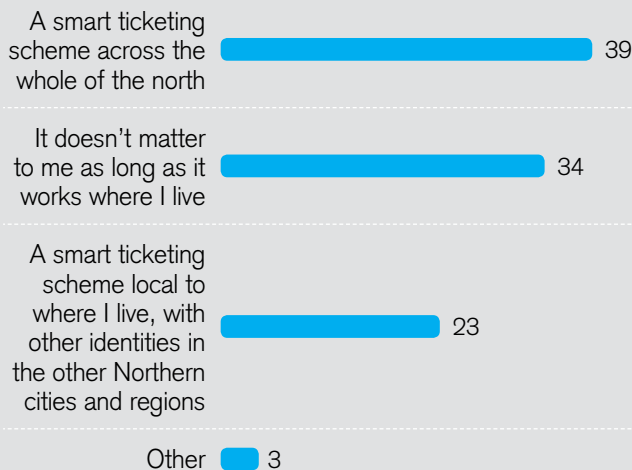
"I think to save confusion it should have the single logo. Because if I go to Bradford or somewhere and there's another picture in the window of a paypoint where I can top up this card then I'm not going to see it as easily as if it's got the original logo in the window."

Leeds, business

In the quantitative survey there is a preference for a northern-wide as opposed to local identity, but around a third aren't concerned with the identity at all as long as the scheme works.

Greater understanding of the mechanics of a north-wide smart ticketing scheme led to a significantly increased appeal and likelihood to use from the general (and positive) response to smart ticketing.

### When a smart ticketing scheme is introduced, which of these would you expect it to look like? (%)

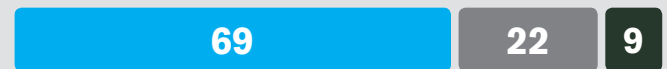


Base: All respondents (n = 2000)

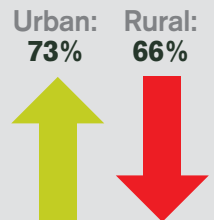
### Northern wide smart ticketing scheme

**Q39** Based on what you have read about smart ticketing and specifically a smart ticketing system, how appealing do you now find the idea? (%)

#### Appeal



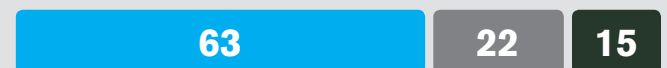
Appeal and likelihood to use higher amongst social grade A/B, full time workers, smartphone owners and 20-40 year olds. Appeal and likelihood to use increases with frequency of public transport use.



- Appealing
- Neither appealing nor unappealing
- Unappealing

**Q40** How likely would you be to use the Northern wide smart ticketing system? (%)

#### Likelihood to use



- Likely to use
- Neither appealing nor unappealing
- Not likely to use

Base: All respondents (n=2000)

We asked how public transport use may change in the future.

- Respondents often find it difficult to anticipate their future behaviours, finding it easier to focus on the here (my city) and now (fixing things that are wrong).
- That said, many agree that current approaches to transport, fares, ticketing and information inhibit journeys – making them more complex, less certain and more expensive than they otherwise might be.
- However, relatively few make the connection from this to envisaging new paradigms of work, leisure, business etc.
- While the above is true, as people learn more about a north-wide smart ticketing scheme in terms of its mechanics, both appeal and likelihood to use increase significantly.

"Instead of being Leeds or Manchester or Yorkshire, I suppose, if commuting was that easy, we'd be the 'North. You know, where, like, really, if it takes me 45 minutes to get the bus into town and half an hour on a train to Manchester, and I'm part of Leeds, we'd become just the north of the country."

Leeds, leisure

"I think a Northern smart card would encourage people to do more travelling – it would encourage me because I'd think 'oh, I could go and see Newcastle, see what that's like' – go and stay for the night, go out for the night, something like that."

Liverpool, commuter

# Notes

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This research is part of the joint Department for Transport/Transport Focus smarter-travel research programme. This research project was carried out by Illuminas.

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