Norfolk bus passenger research phase two report

March 2015

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putting passengers first

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Introduction

1.   Executive Summary

Background

Passenger Focus commissioned research to evaluate a smart ticketing pilot underway on Park and Ride buses in Norfolk. The objective was to understand passenger, local authority and bus operator experiences, both to help inform the pilot's expansion and the introduction of smart ticketing in other locations.

The research used a mix of methodologies: an online survey, quick qualitative 'intercept' interviews, observation and in-depth interviews. A broad range of audiences were consulted including current and potential users of the holdall smartcard®, local authority staff and associated stakeholders involved in the pilot, and Park and Ride bus drivers.

Key Findings

Overview

This research suggests that most Park and Ride passengers welcome the introduction of smart ticketing in principle. However they have mixed views about how the card was introduced and some aspects of the customer journey.

Passengers are generally satisfied with the ease of using the holdall smartcard® on the bus but have some difficulties with their online accounts. Some felt more information and explanation was needed, in particular about the fare structure and different products. Passengers' feedback also showed that perception of the smartcard was entangled with views of the new fare structure and pricing, making some less positive about the card than they may otherwise have been.

Staff perspectives on implementing the pilot

Norfolk County Council (NCC) staff highlighted their influence in the following areas of the pilot:

Developing the customer proposition

The holdall smartcard® was designed to create a flexible platform for customers, both to store different products and to be used in different contexts. It was also intended to improve the speed customers' tickets are uploaded. NCC introduced a financial incentive for customers to 'go smart', making the smartcard fares cheaper than cash fares. The prices of all fares, however, rose with the launch of the holdall® as the card was introduced at the same time as the new Park and Ride fare structure and pricing.

Working with bus operators
NCC organised smart ticketing awareness days and training sessions for bus operators, and resource for continuing support. Most importantly, in NCC staff's view, they provided bus operators with the technical managed service support[1] which they thought was the necessary precondition for small and medium sized bus operators to be interested in taking part in the pilot.

Other factors (see following paragraph) prevented NCC from providing optimal information and training to bus drivers. The interviews with Park and Ride bus drivers found that detailed information and training were provided too close to the launch of the card. Bus drivers also thought the council did not provide enough publicity around the fare changes, which meant that they were left with the burden of explaining this to passengers.

Co-ordinating the suppliers and developing the technology
Technology supplier delays pushed back the launch of the smartcard, making it harder for NCC to provide timely information and training to operators. For this reason, some NCC staff felt that developing the technology was a major challenge in the pilot. Others felt this has been the area of their work where they hope to break new ground of national importance.

NCC staff stressed that some of the technological challenges arose out of the ITSO[2] specification. The ITSO allows suppliers to create proprietary products which deliver different solutions to the same problems, causing interoperability issues. Based on their experience of these issues, the staff highlighted specific strategies that may help avoid or reduce the impact of these problems in the future.

Providing publicity and customer support to passengers
This research suggests that the council's customer service provision worked well in supporting passengers through the transition to smart ticketing, but that their publicity strategy had gaps concerning the information on new fares, which they later addressed.

Passenger experience of, and views, about the holdall smartcard®
Many passengers welcomed the introduction of the holdall smartcard® and saw its launch as a sign that Norfolk is innovative and modern in its approach to public transport. Passengers also associated the following benefits with the holdall®:
- cheaper fares available with the smartcard
- the convenience of not having to carry cash
- the sturdiness of the card when compared to a paper (season) ticket

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[1] Background technical support
[2] Integrated Transport Smartcard Organisation

- reassurance, as there is a record of the purchase in the database if the card is lost
- speedier boarding in the morning when fewer people pay by cash.

Frequency of use had some impact on passengers' behaviour and views, particularly their perception of changes to the fare structure and pricing, and the relevance of the smartcard to them.

Frequent passengers, travelling almost daily or a few times a week, generally had a higher awareness of the holdall smartcard® and the changes to the fare structure and pricing. They were more likely to have applied for the card early on in the pilot, to lessen the impact of the price rise and keep access to the season tickets many used. Consequently, there are lots of frequent passengers/working commuters among holdall® users.

Less frequent passengers appeared less concerned about being affected by the price rise. They were also generally less aware of the holdall smartcard® and some thought they did not use the service often enough for the card to be relevant to them. They thus tended to apply for the holdall smartcard® at a slower rate.

Passengers generally found the application process straightforward and were largely satisfied with how easy it was to use the card on the bus. However, some identified issues where they felt the processes or technology could work better, including being able set up multiple accounts with the same email address, and simplifying the steps needed to use the card with products such as the sQuid travel purse.

Other aspects of using the card were identified as being as less straightforward. Some passengers found it difficult to use their online holdall® accounts and felt that the topping-up process wasn't as convenient as it could be - they wanted an auto top-up function or top-up at Park and Ride sites. And some had difficulties in understanding the new fare structure and pricing, struggling to find the information, feeling the fare structure was complicated and so making them unsure whether they had made the right choice.

Some passengers also wanted the holdall® to be more flexible. They wanted to be able to use their holdall® accounts to change the ticket type they were buying should their circumstances change – something they can't do at present. Passengers also wanted to be flexible about their time of travel, suggesting they should be charged for single tickets for peak or off-peak times as appropriate rather than having to monitor and plan their travel depending on whether they had anytime or off-peak products.

However, passengers' main concern was not the card itself but the products and price rise that were introduced at the same time. Many felt that the prices

rose dramatically and some thought this was done to fund the holdall smartcard®. These passengers found it hard to separate their response to the new fare structure and pricing from how they felt about the holdall® smartcard, making them potentially less positive about the card than they would otherwise have been.

Learnings from the Norfolk pilot
NCC staff were aware of some of the issues highlighted by passengers and were considering changing aspects of the holdall® to improve the customer experience. For example, they explained they would like to improve the application process to allow customers to set up multiple accounts with the same email address and to apply for the card without having to buy a season ticket. They also stressed they would like to change the web portal to make it easier for customers to understand fares and products, as well as to top-up and buy tickets.

The staff highlighted the following as important factors to consider when introducing smart ticketing:
- All stressed the need to co-ordinate technology suppliers closely to ensure they work together to avoid interoperability issues.
- They also stressed the importance of engaging bus operators early in the process to ensure they are committed to the pilot, as well as re-assuring them by offering them a managed service of background technical support.
- Some warned against underestimating the time it takes to train bus drivers as they cannot be easily taken off work. They pointed out the importance of explaining the rationale behind any changes to the drivers as well as explaining how to use the new equipment.
- Some highlighted the need to be cautious about the complexity of the products when developing the customer proposition. They felt simple products may help minimise both the risk of technological difficulties and customer confusion.
- Some felt that changing fares and pricing at the same time as introducing a smartcard is best avoided if possible, as there is otherwise a risk that the price rise may influence passengers' response to the card.

The passenger research highlighted further issues to consider in future stages of the Norfolk pilot and in the introduction of smart ticketing elsewhere:
- Passengers generally, and less frequent passengers in particular, are not particularly engaged with information about public transport so publicity strategies inviting passengers to look online may have limited impact. The Norfolk experience suggests that a mix of offline and online communication is needed to reach a wider range of passengers. In addition, communications may need to address barriers for specific

groups of passengers, for example, the assumptions that less frequent passengers may have about the smartcard not being relevant to them.

- Financial incentive to switch to the smartcard from paying by cash needs to be managed carefully. While cheaper fares are likely to be the obvious appeal of a smartcard, passengers are unlikely to associate the card with affordable transport if they end up paying more than they did before the introduction of the card.

- Previous research on smart ticketing[3] highlighted the need for smartcards to be simple and easy to use, as well as flexible. This is supported by the Norfolk experience, which suggests many passengers seek to minimise the effort involved in paying for travel and so tend to like the simplicity of pay as you go (PAYG). They prefer this because PAYG requires less research and decision-making when choosing the appropriate ticket type, and it also allows flexible travel, which may be limited with other tickets.

- Norfolk's experience also highlights passengers' needs of their online accounts. Ideally, they would have all information and activities relevant to the card hosted on the one website rather than being split between different websites. Passengers also expect to be able to use their online accounts to change the type of ticket they buy and to set up an auto top-up option.

- The research also suggests most passengers feel the need for additional channels to buy and top-up tickets, and would like to be able use ticket machines to do this in addition to the online facility.

- Finally, the research indicates that the holdall® is likely to be more useful, and therefore more appealing, to customers if they can use the same smartcard across different bus services/modes of transport in Norfolk, and possibly for other payments where cash replacement would be beneficial.

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[3] See Passenger Focus, *Smart ticketing – what rail passengers want*, July 2013, http://www.passengerfocus.org.uk/research/publications/smart-ticketing-what-rail-passengers-want-july-2013

2. Background and objectives

2.1. Norfolk Smart ticketing pilot

The Norfolk area was selected for this smart ticketing pilot as it offers a good rural/urban mix, similar to other areas of the country that are yet to 'go smart'. The smart pilot was designed to **test** whether there was an appetite amongst small and medium bus operators to 'go smart' and to **evaluate** the delivery and implementation of smart ticketing.

The overall objectives of the Norfolk pilot were to:
- establish the business case for smart
- inform the design of a national model for managed services[4]
- establish a set of repeatable processes for completing smart enablement across the rest of England.

Within this, the pilot needed to assist the Department for Transport (DfT) in:
- developing channels to engage with small and medium sized bus operators
- establishing the range of technical solutions and support proportional to operators' needs
- establishing a central equipment procurement framework
- understanding the appetite for going smart and any barriers to doing so amongst SME bus operators and passengers
- overcoming the competition issues currently cited as being barriers to developing multi-operator smart tickets
- developing a multi-operator e-purse allowing passengers to pay for tickets on multiple operators using one smart ticket
- developing guidance to support other authorities and bus operators as they introduce smart ticketing
- understanding how the smart data on journeys made can be used to improve bus services.

The smart card (named the holdall®) was launched on Park and Ride buses in Norfolk on 14th April 2014. Presently, the card runs across two different operators and this will increase as the scheme is extended.

2.2 Norfolk pilot evaluation

In light of the above objectives, a full evaluation of the pilot was needed to help develop a roll-out process. The research was planned to include three phases:
- Stage 1 - Pre-stage with operators, passengers and stakeholders
- Stage 2 - During and in the early days of implementation
- Stage 3 - Final post stage

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[4] Background technical support

The pre-activity phase of research was completed in October 2013 (Phase 1). Phase 2 of research was completed between July and September 2014 and is the subject of this report.

2.3   Research objectives

The overall aims of Phase 2 of the Norfolk Pilot Evaluation research were:

- To understand passengers' awareness, experiences and views of the holdall smartcard®
- To understand bus operators' and Norfolk County Council's (NCC) staff experiences of, and views about, the implementation of the smart ticketing scheme in Norfolk.

To achieve this, the research explored the following:

a) Passengers' experience of getting the smartcard

- How have they heard of the smartcard?
- Why did they apply to get the smartcard?
- What were their expectations of the smartcard? (How it will work, benefits, any concerns)
- What were their information needs at the point of applying? To what extent were these needs met?
- What was their experience of the application process? (Ease of applying, ease of understanding fares, speed of card arriving)
- What did they think of the card and accompanying materials once they arrived?
- What would they improve, if anything, about the process of applying?

b) Passengers' experience of using the smartcard

- When and where did they first use their card? Why then and there?
- What was that experience like? Was it clear what they needed to do? What were their initial thoughts? How did it make them feel?
- Did they need any assistance or support? If so, what for and how was this sought? How satisfied were they with customer support? Was their problem resolved? Was their overall experience of seeking assistance positive or negative? How could this be improved?
- What is their experience of using the online account?
- How does paying by smartcard compare to the way they used to pay for their bus journeys?

c) Local authority staff, associated stakeholder and bus driver experiences of introducing the smartcard

- What information and training did they receive prior to the introduction of the smartcard? How satisfied were they with the information and training they were given? What could have worked better, if anything?

- What's their experience of the introduction of the smartcard been like? How confident did they feel that they knew what to do? Did they need any help? If so, what help was provided?
- What have they observed about how passengers responded to the introduction of the smartcard?
- What kinds of issues have passengers had with the smartcard? (Before the introduction, immediately after the introduction, and once the scheme bedded-in)
- What were the most common questions passengers asked them about the smartcard?

d) Passengers' and staff views on how the scheme can be improved and rolled-out to further operators
- What could have been done better when introducing the holdall® on the Park and Ride services
  – from passengers' point of view
  – from staff point of view?
- What can we learn from this experience about:
  – what has worked well and so could/should be repeated when the smartcard is rolled out to other services
  – what has worked less well so needs to be improved when the smartcard is rolled out to other services
  – what are passengers' and staff views on how to improve the process of introducing the smartcard ticketing scheme elsewhere?

The discussion guides and the online questionnaire are in Appendix 1 and 2.

3.   Research methodology

The research used a mixed methodology comprising:
- an **online survey** with holdall® users (completed by 392 respondents)
- 102 brief **qualitative intercepts** interviews with users and non-users of the card, carried out on Park and Ride sites and buses
- **observation** on Park and Ride sites and buses
- 12 **in-depth interviews** with passengers who are users and non-users of the smartcard
- eight **in-depth interviews** with staff involved in the implementation of the pilot:
  – six interviews with NCC staff from Transport and Highways, Smart Ticketing and Park and Ride teams and
  – two interviews with South West Smart Applications Ltd (SWSAL) staff[5]

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[5] Through partnership with SWSAL, NCC provides a managed service to the bus operators involved in the pilot. This includes managing all the technical aspects of the pilot for the bus operators and providing them with an ongoing technical support.

- **informal interviews** with Park and Ride bus drivers (approximately 25 bus drivers interviewed)
- **brief qualitative, self-completion questionnaires** completed by eight members of staff of the NCC customer support call centre.

Passengers questioned for the in-depth interviews also completed **pre-tasks**. Users of the holdall® smartcard were asked to fill in a short questionnaire about their experience of getting and using the card. Non-users were asked to apply for the card, note down their experiences and have a researcher accompany them when they used their card for the first time.

The following range of bus passengers was represented within the qualitative strand of this research:
- users and potential users of the holdall smartcard®
- users of different Park and Ride bus services and different operators[6]
- different journey profiles
  - a good spread of different reasons for travel (work, education or leisure)
  - a good spread in terms of different ticket types typically bought by respondents.
- a wide range of demographics – men and women, aged from 18 to over 70, from the full spectrum of socio-economic groupings and from across Norfolk
- amongst potential users:
  - a mix of those who had heard about the holdall® and those unaware of the card
  - a spread in terms of their interest in using the holdall®, but none completely disinterested.

For the quantitative research with holdall® users, all cardholders were sent an email inviting them to take part in the survey. 392 holdall® users completed the survey, of whom 28% were male and 70% were female[7]. Over two thirds of holdall® users in our sample were aged 40 and over[8]:
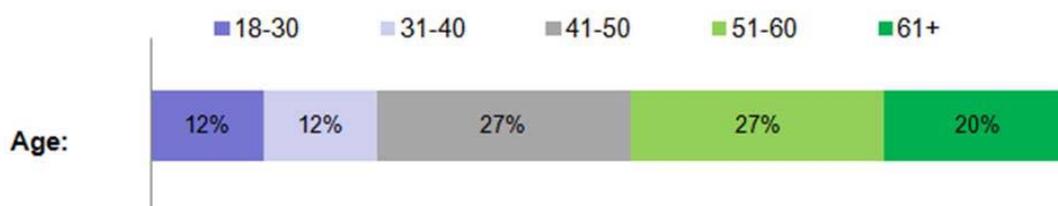
Age spread in the quantitative sample of holdall® users

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[6] Norse and Konect bus operators run Park & Ride (PR) bus services. Respondents were recruited to ensure an even split of users of these two operators.

[7] This largely reflects the gender split in the overall holdall population. Based on the data provided by NCC, 64% of holdall® users are female and 34% of holdall® users are male.

[8] Age: Base – All respondents (392).

Qualitative fieldwork with passengers was completed between 4th and 15th August and fieldwork with staff was completed between 7th July and 15th August. The online survey with holdall® users was carried out between 30th July and 13th August.

The research team included Joceline Jones, Danica Minic, Joanna Crossfield, Ellie Hailwood and Dulcie Denby-Brewer.

Detailed findings

Detailed findings from this research are in two sections. Section 4 focuses on staff experiences of, and views about, the process of implementing the pilot. This is based on the interviews with NCC and SWSAL staff members involved in the pilot and the interviews with Park and Ride bus drivers. Section 5 explores passenger experiences with, and views about, the holdall smartcard®.

4. Implementing the pilot: NCC, SWSAL and bus drivers' perspectives

4.1 The case for 'going smart'

NCC and SWSAL staff explained that NCC had set out to introduce smart ticketing to Norfolk buses in the hope of delivering the following benefits:

Passenger benefits

Staff hoped that smart ticketing would make ticket purchasing more convenient for passengers by allowing them to buy a ticket at any time and removing the need for carrying cash. They also expected smart ticketing to improve passengers' travel experience, for example, by speeding up boarding, providing a more tailored and integrated service, and giving discounts. Some also stressed the value of bringing a technological innovation to Norfolk.

> *"It has the potential to make things so much easier. You take away the issues around having the right money for the bus."* [NCC staff]
>
> *"[Passengers] would get a service that is more tailored to where they lived and when they wanted to travel and they would get discounts out of it."* [NCC staff]
>
> *"We hope it will benefit passengers because if they find it easier to travel and to change buses and operators then that will increase the number of people that are travelling."* [NCC staff]
>
> *"We were hoping for passengers to really benefit from buying tickets when it suited them rather than having to go to the bus station to get their tickets or to have to take large sums of money on the bus to get their tickets from the bus driver. We were also really hoping that boarding times would be speeded up by popping their ticket down and getting on the bus."* [NCC staff]
>
> *"It's just nice to bring a technology that a lot of people who live in Norfolk know about. There is a lot of travel between Norfolk and*

London. To make people realise it's not just big city centres that get innovative ways of travelling." [NCC staff]

Bus operator benefits

NCC and SWSAL staff thought bus operators would benefit from smart ticketing as it would allow them to:

- collect real-time data and assist with tracking vehicles
- collect data about passengers and so help with capacity and route planning
- reduce the amount of cash handling and save money on insurance in the process.

"[Smart ticketing] can help bus operators with data collection and revenue protection. They get much more and better data about their passengers than they used to and that can help them in network planning...They can also make sure that the people are getting the right tickets to improve their revenue protection."
[NCC staff]

"We share that belief that smart ticketing is a good thing to do. A lot of time and effort is put into dealing with cash on the bus and in the back office." [NCC staff]

"One of the things that drivers have always said is that having to find change for customers is difficult, particularly first thing on a Monday morning when lots of passengers arrive with ten pound notes and want to buy a single ticket. So obviously we are hoping that a move towards a cashless system, by promoting smartcards, is to have a lot fewer customers pay with cash, particularly our regular commuters and so there would be fewer conflicts there between passengers wanting change and drivers not having the time." [NCC staff]

Council benefits

Collecting real-time and passenger data was thought to be important to NCC too, potentially helping them with planning bus capacity, route planning, tracking vehicles and bus priority at traffic signals.

"It's an opportunity to get real time information for operational purposes, real time information for passengers and provide bus priority at traffic signals." [NCC staff]

"[Smart ticketing] would help with route planning...and capacity issues." [NCC staff]

Some NCC staff also stressed that smart ticketing offered the council possible savings on customer service. This was seen as part of the council's broader shift towards an online self-service strategy, aiming to cut down the spending on customer-facing staff.

4.2 Developing the customer proposition

NCC staff pointed to three key components of the customer proposition they developed for the holdall smartcard®:

- the concept of the holdall smartcard® as a flexible platform
- the product and pricing structure for the holdall smartcard® as an incentive to 'go smart'
- technical advances improving the speed of uploading products.

The holdall smartcard® is meant to be a flexible platform that can store diverse products and be used in different contexts.

NCC and SWSAL staff explained the key concept is to allow passengers to store different tickets on the one card, and to be able use it for different purposes.

They hoped that when smart ticketing is rolled-out more widely on Norfolk buses the card could be used to pay for other bus travel in the county (not just for the Park and Ride services). In their view, this could help bus transport appear more integrated and easier to use, and so encourage greater use.

> *"Smart cards should be a flexible, adaptable platform for encouraging better use of buses."* [SWSAL staff]

In addition, NCC staff stressed they were keen to explore wider uses for the card, other than transport. For example, they would like students to be able to use their holdall smartcards® for purchases in their school canteen.

> *"We want to go beyond the transport use of the card and put other things on there."* [NCC staff]
>
> "*We also tried to think about the card in longer term so it doesn't just become a bus smart card, but how people could use for other different purchases, whether it's a school meal or a library card, those kinds of things. Thinking of how we can add value to the card so you just end up having one smart card in your personal wallet rather than a series of them."* [NCC staff]

Products for the holdall® were designed to offer a wider choice of tickets, and at a discount to those paying by cash as an incentive to 'go smart'.

NCC staff explained that the process of designing the products for the holdall smartcard® coincided with a wider review of Park and Ride fare structures and pricing. This was independent to the pilot[9] and fares were due to change and rise irrespective of the introduction of the smartcard. However, the need to offer a financial incentive to use the holdall® did influence the re-design of the Park and Ride fare and pricing structure.

When the holdall® was introduced some ticketing products which had previously been available to passengers paying by cash were restricted to the card users only. Users of the holdall® could still choose from a variety of season, saver or day tickets to suit different travel needs and make savings but those paying by cash could now only buy day tickets. New ways of paying were also introduced for holdall® users, with pay-as-you-go payment through sQuid, an electronic payment network.

As an additional enticement to passengers to switch to the holdall®, the pricing structure was changed to make it cheaper to buy tickets with the holdall® than with cash. While fares would have risen anyway, making the holdall® fares cheaper meant that cash fares became more expensive than they might have been without the introduction of the smartcard.

> *"We wanted to give customers an incentive to go smart if it's cheaper."* [NCC staff]

The holdall smartcard® was also intended to bring technological advances and improve customer experience by making it faster to upload products.

Staff explained that it currently takes a minimum of 48 hours to upload products onto smartcards used on buses elsewhere in the country. They said NCC and SWSAL wanted to improve passenger experience by making it possible to upload products overnight.

NCC took on the challenge of developing the technology needed for speedier uploading, and in so doing hoped to break new ground in smart technology and benefit future smart ticketing schemes.

> *"We were pushing some of the boundaries on time it takes to get products on your card. Ability to go online, buy a ticket and travel the next morning is a major aspect of what smart should deliver."* [SWSAL staff]

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[9] The following key changes to the Park and Ride fare structure and pricing coincided with the introduction of the smartcard: 1) prices of all tickets were increased; 2) peak and off-peak times were introduced to deal with capacity issues (peak times: before 9.30am and 4-6pm); 3) group tickets were changed so that 2 people could no longer buy a group ticket and group tickets could be bought at off-peak times only; 4) children over 5 now need to pay for tickets whereas they didn't before.

4.3   Working with bus operators

NCC staff stressed the importance of getting bus operators and drivers 'on board' with the pilot and providing them with necessary support. NCC put resources and activities in place to raise awareness of the benefits of smart ticketing and provide information, training and support for bus operators. Crucially, they provided bus operators with background technical support: the 'managed' service. However, delays in getting the technology ready combined with NCC's publicity strategy resulted in the council being unable to provide optimal support to bus drivers ahead of the launch.

NCC and SWSAL staff stressed the importance of engaging bus operators early in the process to ensure they were on board and willing to take part in the smart ticketing pilot.

To achieve this, NCC staff ran 'smart ticketing awareness days' for bus operators at the start of the pilot to:
- highlight the benefits of smart ticketing for bus operators and passengers
- reassure bus operators about the technical and other support provided by the council
- and ultimately get them to understand and welcome smart ticketing.

NCC staff outlined the support the council provided to bus operators once they had decided to take part in the pilot:
- In partnership with SWSAL, NCC provided bus operators with the 'managed service' where all technical aspects of smart ticketing were taken away from operators and handled by SWSAL. This service included the electronic ticketing kit, the 'back office' and on-going technical support with running the equipment.
- NCC provided training for bus drivers to show them how to use the smart ticketing machines ahead of the launch.
- NCC staff were present at Park and Ride sites on the day of the launch to help answer any queries and help in case of issues with the technology.
- NCC and SWSAL each had one member of staff whose role included on-going support to bus operators. Their work primarily involved dealing with technical issues but they also helped out with drivers' queries or problems relating to the holdall smartcard® on Park and Ride buses.

"The major reassurance was the managed service. We effectively had to say to them you needn't worry about the technical side, we'll take away all that from you." [NCC staff]

> *"We arranged for extra staff at the sites [at the time of the launch], all there to help people with their Smartcards and to give the drivers backup."* [NCC staff]

> *"We dedicated 2 people for [providing support to bus operators] full time: going out, meeting with operators, meeting all their queries, understanding their routes, uploading information on the system, double checking it and being on hand literally 24/7 when they first started because buses don't conveniently operate between 9 and 5. So we had to make sure they had people to call, to deal with."* [NCC staff]

In addition, the council changed the terms and conditions for future contracts with bus operators requiring them to become smart enabled. This provided a further incentive to bus operators to be involved in the pilot.

Norfolk's and SWSAL's experience suggests provision of 'managed service' is key to making small and medium size bus operators interested in smart ticketing.

NCC staff said that when the scheme was first introduced to bus operator management teams their response was generally positive. There were some variations in response, depending on the size of business and how comfortable they were with new technologies, but on the whole bus operators appreciated how they could benefit from smart ticketing. They were particularly interested in:
- getting real-time and passenger data
- making cost savings through reduction in cash handling (for example, saving on back office costs and on insurance)
- potentially achieving speedier boarding times.

> *"A lot of people see the advantages of being connected and being able to see where the vehicle is. The bus operators like that."* [NCC staff]

The most common questions bus operators had for the council concerned:
- the timescales for transition to smart ticketing
- the cost of equipping the buses with smart ticketing machines
- the possible negative impact of any technical issues on running their service.

> *"We didn't have a lot of resistance. If we had any, that was mainly from small operators which was over uncertainty and how much work it would be for them."* [NCC staff]

> *"It was reasonably consistent actually. Some of them thought it was a really good offer; others wanted a bit more detail (...) and more information about how the technical side of it would have worked. But overall, people were very receptive to it. (...) Even the very small operators were keen because I think they've realised that they couldn't do it with someone helping them initially."* [NCC staff]

Importantly, small and medium sized bus operators generally did not feel they had the capacity to deal with the technical management of smart ticketing. The managed service was key to getting them interested in the pilot, as well as highlighting the benefits of smart ticketing and providing reassuring on timescales and cost.

> *"For any bus operator, they all struggle with ITSO. There is a huge amount of work that has to go in the background. SWSAL provides this for all of the buses that we are equipping. And if they weren't doing it all our little bus operators would tell us to go."* [NCC staff]

Following the introduction of the holdall smartcard®, bus drivers' feedback suggests they can see the potential of smart ticketing but don't think they have yet benefited as much as they hoped.

The bus drivers interviewed varied in terms of their general comfort with, and interest in, new technologies. Many were prepared to consider whether and how smart ticketing could benefit the drivers. In particular, they stressed they would appreciate it if it meant they wouldn't have to handle and carry cash and if it helped to speed up the boarding times.

> *"We'd be happy if we didn't have to carry cash around and it was quicker."* [Norse bus driver]

Looking back at their experience of the pilot so far, there was some acknowledgement that they have benefited from carrying less cash since the holdall smartcard® was introduced. However, there was also a sense that too many passengers still paid by cash for them to feel any significant difference.

With regard to boarding times, some drivers agreed that certain products, such as season tickets, do speed up boarding. This was particularly true in the morning when there are more commuters, who are often holdall® users and season ticket holders. However, drivers also stressed that other products, such as the sQuid travel purse and 10 day saver tickets, did not make any

difference to boarding times or sometimes took even longer than paying by cash.[10]

> *"You have to press too many buttons with sQuid also have to activate 10 day tickets."* [Norse bus driver]

Drivers felt the main reason for not benefitting from speedier boarding times was because they were regularly slowed down by explaining the new fare and pricing structure, introduced at the same time as the card.

Interviews with passengers corroborated this view. Some spoke of frustrations during the afternoon peak time in particular. Specifically, they reported that bus drivers had to explain the new peak and off-peak prices over and over again and handle frustrated passengers while the rest of the bus was waiting.

> *"There's no one else to complain to but the drivers, so the drivers get it in the neck."* [Female, 33, User, Konect]

Some of these difficulties are likely to reduce as passengers and drivers get used to the new fare structure. And as holdall® ownership grows, the benefits of speedier boarding times and handling less cash may become more significant.

Bus drivers' views were mainly negative on information, training and support provided by NCC for the introduction of the holdall® smartcard.

Most of the bus drivers' negativity concerned the council's perceived failure to adequately publicise the changes to the fare structure and prices. In their view, information about these changes was lost amidst the holdall® publicity, leaving it to the bus drivers to explain the new fares to passengers and so affecting them negatively. Some drivers were also frustrated they had not been asked for their views as part of the process for introducing the card and changing the fare structure.

Many drivers complained that they didn't get timely information and training about the holdall smartcard®. They explained they learnt the detail and received their training two weeks before the launch, the same time as the public. This did not leave them enough time to prepare for the launch thoroughly and some drivers weren't sure what they needed to do on the day itself.

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[10] They explained this was because using both the sQuid travel purse and 10 day saver tickets involved more steps than simply placing the smartcard on the reader. With the sQuid travel purse, the passenger first needs to tell the driver they want to pay in this way and the driver then needs to press a few buttons to issue their ticket. With 10 day saver tickets, the drivers explained they often had to activate them as well as issue receipts to passengers showing how many journeys they had left. In their view, all these steps meant the process wasn't quicker than paying by cash and sometimes they felt it was longer.

> *"We're like mushrooms. Kept in the dark."* [Konect bus driver]

On a more positive note, some said it had been useful to use the ticket machine kit during the training although they would have preferred to have had it for longer. Some also singled out certain individuals from NCC who they felt worked hard to help the drivers. However, this was perceived as an individual effort rather than resource deliberately put in place by the council.

Park and Ride bus drivers' experience of the introduction of the holdall smartcard® indicates more time is needed to:
- provide the sufficient training to bus drivers
- allow them to use the ticket machine kit on more than one occasion.

It also highlights the drivers' need to be consulted and informed about the changes to their service.

When NCC staff reflected on what caused these issues for bus drivers, they pointed to supplier delays with getting the technology ready and aspects of their publicity strategy.

NCC staff said their ability to provide timely training to the drivers had been affected by supplier delays, and that the holdall smartcard® had not been available for training purposes until two weeks before the launch.

Some NCC staff also recognised how the delays in the technology had combined with their publicity strategy to leave gaps in passenger information. Fare changes had been publicised during the Traffic Regulation consultation, but because of the subsequent delays, this information was no longer front of mind by the time the new fare structure and holdall smartcard® were finally introduced.

Staff also acknowledged that NCC's main focus was on promoting the holdall®, underestimating the need for publicity about the fare changes. However, NCC adjusted their approach once operator feedback from the first two weeks had identified the information gaps (see Section 4.5 for more detail about this).

> *"The price change sort of got submerged in the general holdall® publicity."* [NCC staff]
>
> *"I think in our worry to ensure that the holdall® worked the impact of the fare changes got a bit lost in the holdall® related publicity."* [NCC staff]

Overall, challenges with getting the technology ready affected NCC's capacity to provide optimal information and training to bus drivers. Having drivers'

4.4 Co-ordinating suppliers and developing the technology

NCC and SWSAL respondents outlined how they had worked with suppliers to develop, run and refine the technology needed to implement their customer proposition. They highlighted the key challenges encountered and the lessons learnt that might be of use to other counties introducing smart ticketing.

NCC defined the customer proposition for the holdall smartcard® in ITSO terms, consulted suppliers over the proposed specification and timescales, and was reassured that both were feasible.

NCC followed the following process with suppliers:
- At the start of the pilot, NCC consulted suppliers on what they could do to deliver their customer proposition and were reassured that it was technologically feasible within the proposed timeframe.
- NCC then devised a Technical Scoping Document which defined holdall® products in ITSO terms.
- This was shared with suppliers for them to comment on and highlight any issues.
- Suppliers confirmed that the holdall® products specified, and overnight uploading, were technologically feasible.
- NCC then consulted suppliers about the time needed to develop the specified technology, and built their project programme around this.

> "The technical scoping document defined the six products that the County Council has agreed with DfT to do in detailed ITSO terms. This work was shared with all of our suppliers to let them see it and see if there are any issues with it." [NCC staff]
>
> "We built our project programme around what the suppliers were able to deliver." [NCC staff]

NCC staff said that given the timelines that suppliers had committed to, NCC had no reason to believe that it would take any longer to develop the technology.

NCC then encountered various supplier related challenges, some of which they viewed as linked to the ITSO specification.

NCC and SWSAL respondents highlighted the following key technology related challenges encountered during the pilot:
- proprietary products
- interoperability issues
- technology still being developed

- supplier delays.

Proprietary products

Respondents reported that the ITSO specification leaves room for suppliers to make certain elements of the smart ticketing equipment proprietary. For example, the latest, 2.1.4 ITSO standard provides the specification for Host Operator or Processing System (HOPS) and ticketing machines but not for the Card Management System (CMS). As a SWSAL respondent explained, this means that: "Any ticket machine is able to talk to any HOPS but not CMS. They are linked to their HOPS, as CMS are proprietary."

According to some NCC staff, this meant that NCC couldn't use the CMS they already used for their ENCTS cards. Instead, they had to buy a new CMS from the same supplier, who now provided the HOPS machine for their smart ticketing pilot.

> *"The ITSO specification is designed to be open but it isn't and that's the big frustration. Although the suppliers work with an open specification, they try to make things proprietary."* [NCC staff]

Interoperability issues

Respondents also highlighted how the flexibility of the ITSO specification can lead to interoperability issues. ITSO allows certain flexibility to suppliers, so they can use different solutions for the same problems. But this means interoperability issues can arise, with equipment from different suppliers unable to 'communicate' with others.

For example, ticketing machines for Konect buses were supplied by Vix but the help point machines at Park and Ride sites (where passengers could collect their products and check what they had on the card) were supplied by Ticketer. Due to interoperability problems, Vix ticketing machines were not able to communicate to Ticketer help points for a while during the pilot. Until this problem was solved, it meant that Konect bus passengers weren't able to use help points.

> *"You have a whole system and if one bit of it decides that it can't speak or it's not going speak, then it makes the system inoperable. So that's the main issue."* [NCC staff]

Technology still being developed

Many NCC and SWSAL staff stressed that the issues encountered with smart ticketing technology development are on a national level, and are not specific to the Norfolk pilot. A SWSAL respondent gave an example of a particular specification within ITSO for loading fares onto cards securely, called Action

List 15. And according to this respondent, none of the suppliers of HOPS machines is currently able to deliver this specification effectively.

> "*We've managed to crack through a number of very difficult issues. Anyone else starting a project of similar scale would encounter those issues now because it's breaking new ground.*" [NCC staff]

Some NCC and SWSAL staff explained they see their work as contributing to smart ticketing technology development, and so nationally relevant. In particular, they were proud of pushing the boundaries by working with suppliers to enable the overnight uploading of products onto the cards.

Norfolk's experience of developing the technology reflects broader, nationally relevant issues about what still needs to be done to close the gap between customer proposition(s), ITSO specification and available technology.

Supplier delays

In addition to these broader challenges with technology development, NCC encountered problems with supplier delays which pushed the launch of the holdall smartcard® back to April 2014 - nine months later than originally proposed.

> "*We set what we wanted to do with our fares and our structure (...) and it seemed like those things would be possible with the card and with technology surrounding the card. But what has actually happened is those things are technically possible but it's not been able to be implemented so we have the structure that we really wanted but it's not quite there on the cards yet.*" [NCC staff]

This delayed launch was the main technological impact on the pilot. Thereafter problems were more sporadic and limited. For example, NCC and SWSAL respondents recalled occasional faults where certain products weren't uploaded overnight meaning customers could not use them in the morning.

> "*There are issues sometimes with top ups not arriving so the customers then go the next day to collect it and something's gone wrong with the systems and those products have not been sent through. So the person then doesn't have the ticket available which is difficult.*" [NCC staff]

NCC's experience with suppliers provides some useful pointers to reducing interoperability problems and processes, and these may help ensure faults are identified and resolved in a systematic manner.

Some NCC and SWSAL respondents thought problems with interoperability could be minimised through better coordination of suppliers. They stressed the importance of ensuring that the Technical scoping document defines everything closely, leaving no room for suppliers to solve the same issues differently. They also said it was important to keep suppliers talking to each other to ensure they deliver compatible products.

> *"There has to be a co-ordination between suppliers so they're all working together and agree how the spec is going to be delivered."* [SWSAL staff]
>
> *"You need to make the technical specification tight so there's no wriggle room for suppliers."* [NCC staff]

Other respondents highlighted the need for a systematic problem reporting system for suppliers. They recommended that fault-reporting processes should be agreed and put in place to ensure that each week each supplier reports any issues, and then systematically works through them to fix the problems.

> *"You need a structured fault reporting system with suppliers, a system to keep track and review issues end of every week to ensure faults are fixed."* [NCC staff]

NCC staff had mixed feelings about how technologically ambitious the pilot should have been. Some wondered whether they should have developed their customer proposition around what suppliers were able to deliver, rather than developing the technology to support the customer proposition. Others were proud of having taken on the challenge of developing technology to improve customer experience, potentially making things easier for other smart ticketing schemes in the future.

> *"What we should have said to the technology providers was 'What can you put on a card? Right, we'll give you a price for that'. Because although they said we can have weekly, we can have any time products, we can have off-peak products, when it actually came to it they have never done it before, and therefore they were having to code new products."* [NCC staff]
>
> *"I think we have been able to develop a lot of technical competence and part of our objective is, if you like, to create a bit of a manual of how you do this. So we've created a bit of a toolkit that other local authorities could choose to use... and it would be much easier for them."* [NCC staff]

4.5   Publicity and customer support

NCC staff outlined the rationale behind the strategies for publicity and customer support and explained what went into delivering them. They discussed what worked well and what could be done better both before, and after, the holdall smartcard® launch.

In line with NCC's broader aims to switch some parts of customer facing services to an online self-service model, NCC's publicity strategy sought to direct passengers to go online for detailed information about the holdall®.

> *"The county council promotes using or getting people online, because there are so many benefits of being online."* [NCC staff]
>
> *"There are savings to be made from online self-service."* [NCC staff]

NCC's initial communications strategy, ahead of the holdall smartcard® launch comprised:
- offline holdall® adverts and basic information about the card
- online more detailed information about the card and the new fares.

Before the launch, adverts were placed on Park and Ride buses and posters and leaflets handed out at Park and Ride sites. The offline publicity materials were generally visual and they focused on the holdall® brand and the key messages about the benefits of smart ticketing: 'easier, quicker, cheaper'. The posters and leaflets gave some basic information about the card and fares but generally directed customers to go online to find out more and apply for a holdall®.

> "*When you just saw a poster for the holdall® on its own, like on the back of a bus for example, it was quite visual and it just said 'Find out more: norfolk.gov.uk/holdall'. Just sort of encouraging people to go onto our website and find out more. At which point they would have seen the information about the new fares and bus times. Everything they would have wanted to know, right online."* [NCC staff]

The NCC website had general information about the holdall® and more detailed FAQs about the card. It also had detailed information about the new fare options, prices and peak and off-peak times. It directed customers to go to the holdall® website to apply for the card.

After the launch it became clear that this largely online-oriented strategy had failed to reach a significant proportion of passengers, who were unaware of the holdall® card or the new fare and pricing structure. This is amply corroborated

by our interviews with passengers and drivers, who often felt that drivers had been left with the task of explaining the fares that passengers could buy with the holdall®, and the new rules around the peak and off-peak times. This caused problems for the drivers.

> *"We did a big promotion about what these fares were going to be [but by the time of the launch] that just got further and further and further away. Customers obviously forgot about that new fare structure. (...) So that was the thing in the end, causing the big issue, not the smartcard. They all worked fine but we just had a lot of people turning up with the wrong money and not having the right money and that was causing problems for the drivers."*
> [NCC staff]

NCC staff explained how such feedback from bus drivers had prompted the council to adapt their publicity strategy to include **more detailed offline information** and **more information about the fares**. NCC introduced billboards with detailed fare and holdall® information on Park and Ride sites and then started handing out leaflets on Park and Ride buses as well.

> *"Giving a passenger on the bus a leaflet that they'd read on the way back would have been a lot more effective."* [NCC staff]
>
> *"I think that the leaflet we subsequently produced would have been better if we had that leaflet at the beginning. It sort of summarised the holdall® and fares all together and it was something that customers could take home and peruse at their leisure. But having this paper information leaflet doesn't exactly fit with our big aim to get holdall® online only. All the time we had to tell customers 'Stuff was on the website, stuff was on the website'. I think it's this leaflet that was finally beginning to get all the messages through to customers. Is still seems that customers do still value paper information and leaflets no matter how modern we want them to be."* [NCC staff]

Norfolk's experience highlights difficulties in engaging passengers with information about changes to the bus services they use. As shown by this research, many passengers' engagement with this type of information is relatively low, meaning they often miss information displayed on bus stations/sites. Many are also unlikely to make an effort to go online to find out more. This suggests that information about the introduction of a smartcard, or new fares and prices, needs to be 'pushed' to customers, for example, through leaflets that are handed out on buses, rather than expecting them to look for it.

Norfolk's experience further suggests that fare changes and smart ticketing are best introduced separately from each other *if possible,* in order not to affect the response to the smartcard and overwhelm passengers.

NCC initially decided to introduce the holdall® and the new fare and pricing structure at the same time because they thought it would be easier for passengers to go through one transition than two. NCC also wanted to avoid two Traffic Consultation processes that would have been needed to change the fare prices twice.

> *"At the time it looked as if it would make it simpler for the drivers and the public as one transition rather than two."* [NCC staff]

However, the nine-month delay in launching the card meant that the media coverage of the new fares and prices was somewhat forgotten by the time the card was introduced. As a result, some passengers were shocked at the new fares and claimed that they were not informed about them.

As interviews with passengers and drivers further suggest, frustrations around the price increase and the perceived lack of information about the fares and peak and off-peak times affected some passengers' and drivers' response to the smartcard. Holdall® reception was entangled in passengers' response to the new fare structure and prices, muddling some passengers' perception of the smartcard and making them less positive about it than they might otherwise have been. In light of this, some NCC respondents did wonder whether it would have been better to have introduced the smartcard and the new fares and prices separately.

> *"The experience of the smartcard has been marred by having to put prices up. I don't think that anyone dislikes the card, but they dislike the price rises."* [NCC staff]
>
> *"In hindsight, they should not have been [introduced at the same time]. (...) If we had known how long it was going to be, we would have had the fare rise the year before. But because the actual introduction date went back about 9 months in the end from the original plan, it was too late. We missed that chance."* [NCC staff]
>
> *"In hindsight, it would have just been better to promote the Traffic Order in a way that allowed us to implement the holdall® fares straight away with cash. And then when the holdall® was launched to flip it around so that the cash fare became more expensive and then the standard price was the holdall® price. Because then obviously customers would be like 'Oh, hang on, I want to keep my three pounds fare so I'll get a holdall® card.'"* [NCC staff]

To complement the online self-service facility, NCC put in place direct customer support for the holdall smartcard® so passengers could raise queries via phone and email.

According to NCC and SWSAL staff, while NCC was keen to adopt an online self-service strategy there was also an understanding that some form of direct customer support would be needed for the holdall smartcard®. NCC therefore set up different tiers of direct customer support.

> *"An overall NCC approach is a concept of online self service and direct customer support through a call centre."* [SWSAL staff]

NCC staff involved in designing the customer support processes outlined what has been put in place:

- The first port of call for customers contacting NCC via phone or email is either the customer support call centre or the business support team. These staff answer customers' queries from information in the public domain (for example, the FAQs on the NCC website) and from customer information template answers provided by the smart ticketing team. Most do not have access to CMS so cannot see customers' accounts.
- More complex queries that they cannot answer, or that need the customer's account to be checked, are transferred to the smart ticketing team. One person in this team deals with most queries and is responsible for providing customer support and creating the customer information templates used by the call centre and business support staff.
- Most complex queries and issues are transferred to SWSAL.

NCC staff felt confident that these processes and tiers of customer support worked well, enabling NCC to develop the capacity to handle customer queries and issues directly, with only the most complex technical issues being handed over to SWSAL.

There was also some praise for NCC from SWSAL for providing direct customer support, as other local authorities they work with don't necessarily, meaning that all the customer queries come to SWSAL.

> *"Norfolk is fantastic at supporting the customers directly. In some other places everything comes to SWSAL."* [SWSAL staff]

The customer support staff consulted generally felt well prepared and supported to provide customer support for the holdall smartcard®, but had some frustrations too.

As most of them noted in answering the questionnaire, they found the training organised by NCC useful. Some also pointed out that they would not have understood the publicly available information about the holdall® without the training, as they thought that the holdall® information available on the NCC website wasn't always clear. Following the training, however, most felt they were well placed to explain this information to passengers. Not everyone interviewed said they had been trained and one respondent complained about having to answer holdall® queries with no previous training.

> *"We have had the advantage of the training but for the public the whole system is confusing."* [NCC CSC staff]

Customer support call centre staff said they were satisfied with the level of support provided by the smart ticketing team in handling more complex queries. Some, however, reported feeling frustrated at times as they couldn't access customers' accounts so they felt the help they could provide was limited. Others complained about the lack of 'back-up' resource in the smart ticketing team when the officer responsible for customer support was unavailable.

> *"There has been support from the smart ticketing team, who have been very helpful."* [NCC CSC staff]
>
> *"It's not always easy as I have no access to look at their records."* [NCC CSC staff]

Further training sessions, and 'back-up' resource in the smart ticketing team for more complex queries, may help to further improve their capacity to provide quality customer service.

NCC respondents from the smart ticketing team thought that the customer support processes and resources put in place generally worked well but had frustrations over how much they were able to improve the customer experience.

Interviews with NCC respondents suggest that handling holdall®-related queries helped them to understand which elements of the customer journey weren't fully meeting customer needs and could be improved. Some of them said that they used this customer insight to ask suppliers to make changes, for example, to make the wording on the web portal clearer. However, it was sometimes a challenge to get these changes made as the process was often longer than NCC expected it to be. For example, changing the web portal appeared to be a slow process.

> *"Trying to change the web portal and how you top up through it has been a challenge."* [NCC staff]

Some NCC respondents stressed they were considering making further changes to improve the customer experience, which may be implemented in the next stages of the pilot. However, they also thought that what they will be able to do is likely to depend on what suppliers can do and when.

> *"It would be good to be able to put a lot more focus on the web portal making customer understand what they're doing as they're doing that."* [NCC staff]

> *"We would like to produce some simple infographics to explain what goes in your holdall® and how the tickets are uploaded overnight."* [NCC staff]

5. Passengers' experience of the pilot

5.1 Passengers' mindset and profile

As noted earlier, the holdall® card was introduced at the same time as fares were increased on Park and Ride buses. For many of the respondents in our qualitative sample, the fare increase set the tone for the discussion of the holdall® card. This also prompted some to recall other changes to the service in recent years and re-consider their reasons for, and benefits of, using the service.
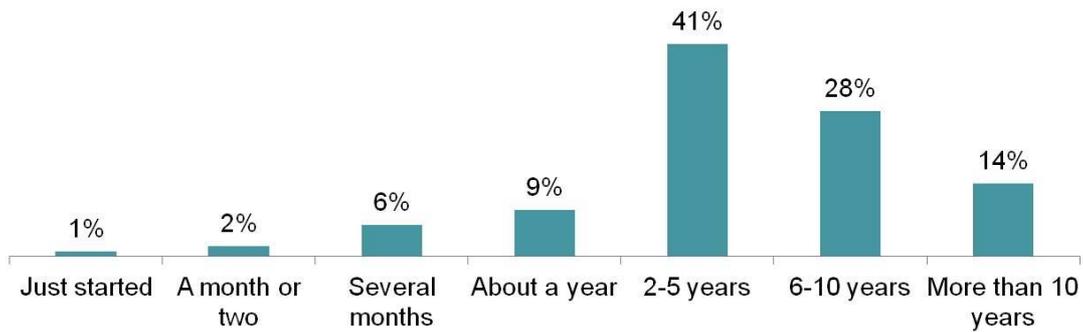
These comments were helpful in understanding their mindset at the time of the holdall smartcard® launch. They also revealed some differences between more and less frequent passengers about the extent to which they felt they would be affected by the price increase. This was corroborated by the quantitative data, which shows a greater and faster take-up of the holdall® card among frequent users than infrequent users - reflecting the difference in how affected they are by the price rise.

Park and Ride passengers' mindset before the holdall® launch

As both the qualitative and quantitative data show, long-term customers predominate among Park and Ride passengers consulted in this research. Based on our survey of holdall® users and as shown on the chart below[11], 83% of passengers have used Park and Ride for more than two years and 42% for more than six years.

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[11] Q9. How long have you been using Park and Ride bus services? (Base: All respondents: 392)

Bar chart values:
- Just started: 1%
- A month or two: 2%
- Several months: 6%
- About a year: 9%
- 2-5 years: 41%
- 6-10 years: 28%
- More than 10 years: 14%

Many respondents in the qualitative research remembered how the service has changed, citing previous changes to the fare structure, pricing, staffing and facilities. With those changes in mind, some felt that over the years that the service had shrunk but become more expensive.

> *"Two years ago the P&R sites had little offices and restrooms. You could renew your ticket at the sites. Now to renew your ticket you have to go to the Bus station."* [Male, 51, User, Norse]
>
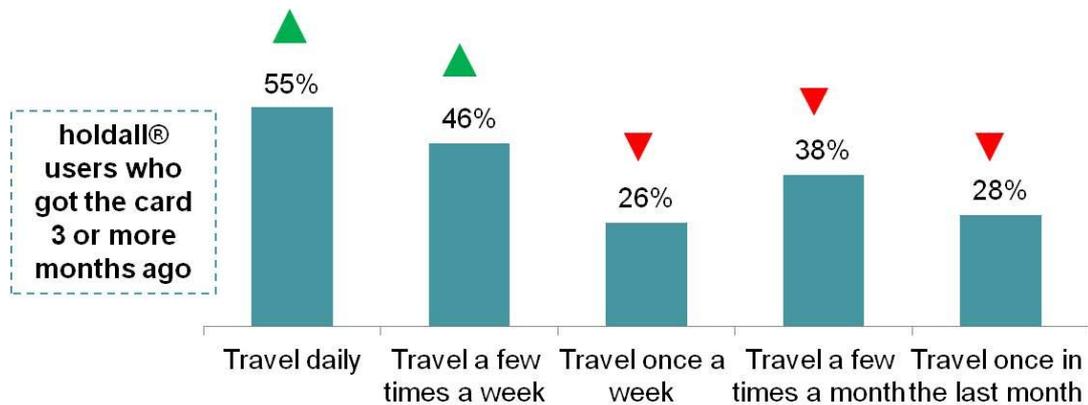> *"It's no longer any cheaper than the ordinary bus or just driving."* [Female, 54, Non user, Norse]

The holdall® was launched in the context of fare rises, making some passengers question whether Park and Ride was still the most cost effective and convenient way for them to get to town.

While this feeling was found among both frequent and less frequent passengers, there were some differences depending on the frequency of travel.

Qualitative data suggest that some less frequent users felt less frustrated by the changes to the fare structure and prices, as they did not think they would affect them very much. In contrast, frequent passengers often thought they would be affected by the price rise significantly, so many felt they had to obtain a holdall® as soon as possible to minimise the impact.

Quantitative data confirms this, showing that infrequent passengers were significantly less likely to get a holdall® early, unlike the daily passengers and those who travel a few times a week, many of whom hurried to get holdall® before or as soon as it was launched[12]:

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[12] Q4. About when did you receive your holdall smartcard®? (Base: All respondents: 392)

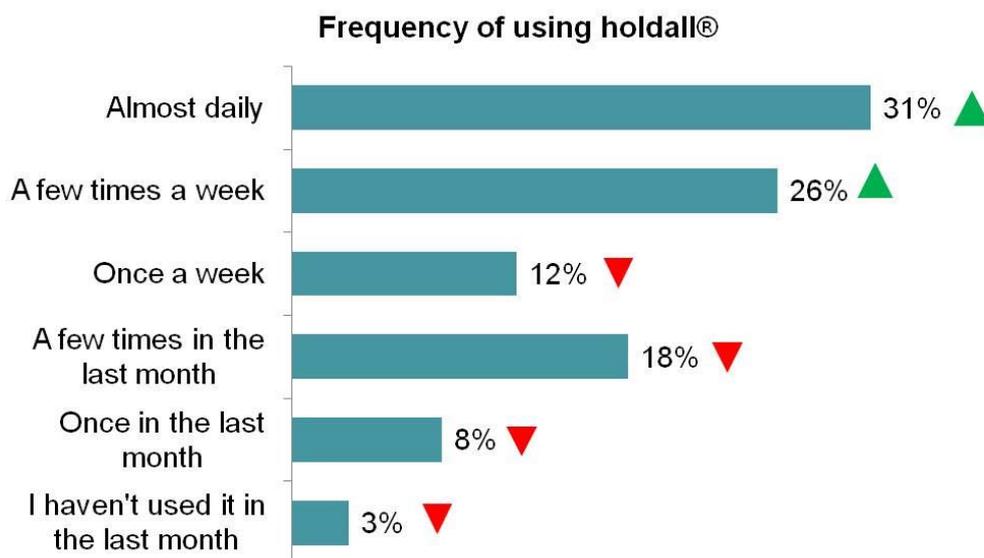|	Travel daily	Travel a few times a week	Travel once a week	Travel a few times a month	Travel once in the last month
	55% ▲	46% ▲	26% ▼	38% ▼	28% ▼

"I had my card a couple of weeks before they were accepted on the buses...I understood from the new pricing structure that that would be the cheapest way for me to travel so I just thought I'd get it straight away." [Male, 31, User, Norse]

Holdall® users' profile and travel behaviour

These differences between frequent and infrequent passengers are further reflected in the profile of holdall® users. Based on our survey of card users, they are significantly more likely to be:

- travelling daily or several times a week
- working rather than not working.

Over half of holdall® users who took part in the survey travel a few times a week or more, and over two thirds travel once a week or more, as shown in the chart below[13]:

Frequency of using holdall®

Almost daily	31% ▲
A few times a week	26% ▲
Once a week	12% ▼
A few times in the last month	18% ▼
Once in the last month	8% ▼
I haven't used it in the last month	3% ▼

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[13] Q7. How often have you used your holdall® in the last 4 weeks? (Base: All respondents: 392)

Furthermore, in our sample of holdall® users:
- 50% were working full time
- 29% were working part time
- 17% were retired.

This suggests that frequent and working passengers see the holdall® as relevant to them and passengers who travel once a week or less see it as less relevant. For holdall® ownership to grow further this perceived lower relevance to infrequent users may need to be addressed.

5.2 Customer journey with the holdall®

Overall, passengers found the application process and using the card on the bus easy, although there were certain aspects they thought should work differently. More problems were experienced using the web portal to buy tickets or top up their card. This research also established that less frequent passengers' main barrier to getting the card is their perception that they don't use the bus service often enough for it to be relevant to them.

The section below details passengers' experiences at different points in their journey with the holdall® card: from their initial awareness and assumptions about what it should be like, through applying for the card and using it on the bus, to using the online account and experiences of customer support.

Awareness of the holdall®

Most passengers in our qualitative sample reported seeing some holdall® information or advertising, but most non-users said they had thought that this was irrelevant to them.

Users' accounts of how they got the holdall® card showed they followed the customer journey set out by NCC: they said they heard about the holdall® from Park and Ride notices, adverts on buses or leaflets and then went online to find out more and apply.

> *"When we were at Park and Ride waiting for the bus we saw a big poster on the bus shelter. We thought it was a good idea and decided to get one."* [Male, 73, User, Konect]
>
> *"I heard about it when it was first launched. There were people handing out flyers at the park and ride centres."* [Male, 31, User, Norse]
>
> *"When holdall® was introduced the bus driver said you do know you can get literally a pound off a day if you get one, so I went for one then."* [Male, 51, User, Norse]

Most non-users could also remember seeing some information or adverts about the holdall®. However, some did not realise the holdall® had any relevance to buses. Those who did understand that the holdall® was a smartcard they could use on Park and Ride buses thought they did not use the buses often enough for the card to be relevant to them.

> *"I'd seen bits on the board but I don't use the buses that much so I didn't think it would be worthwhile!"* [Male, 59, Non user, Konect]
>
> *"I'd vaguely seen advertising with holdall® on it but it must have passed me by because I had no idea it was to do with Park and Ride! Perhaps I didn't look closely enough but holdall® to me doesn't say travel tickets it says luggage!"* [Male, 56, Non user, Norse]

Users and non-users in our qualitative sample both underlined how the holdall® was not a big topic of conversation and they rarely heard about it from friends or family. This observation made some of them think that the card was not promoted enough and that future similar initiatives will require more promotion.

The quantitative data support these findings, showing that most holdall® users heard about the smartcard on Park and Ride sites, either from adverts and information notices or by talking to members of staff[14]:
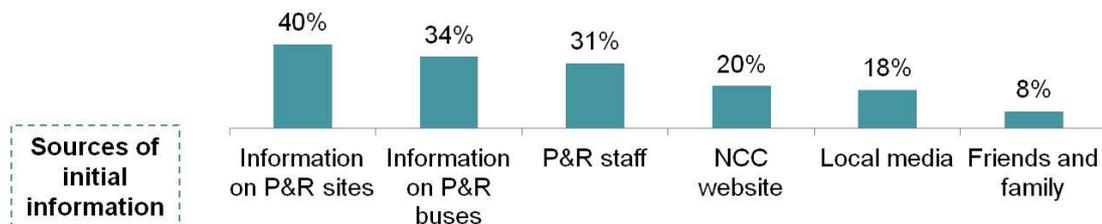
Reasons for getting a holdall®
In our qualitative sample, users of the holdall smartcard® explained they applied to get the card in order to:
- get cheaper fares
- avoid having to carry cash
- buy tickets they couldn't buy with cash anymore.

The key perceived benefits are thus financial incentives, convenience and wider choice of products.

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[14] Q1. Where did you hear about the holdall® smartcard® before you applied for it? (Base: All respondents: 392)

"I was handed out a leaflet and it looked like it would save me money so I applied for it." [Female, 33, User, Konect]

"I don't have to carry cash any more to get on the bus, I don't have to worry about taking £20 or whatever it was to get my 10 trip pass." [Male, 24, User, Konect]

"I thought it was a good idea when I heard about it – for convenience and getting the bus fare a bit cheaper." [Male, 73, User, Konect]

"I don't have to worry about change which is great! Very easy and uncomplicated all round." [Male, 56, Non user, Norse]

Quantitative data support this finding, also showing that time saving is a driver for getting a holdall®.
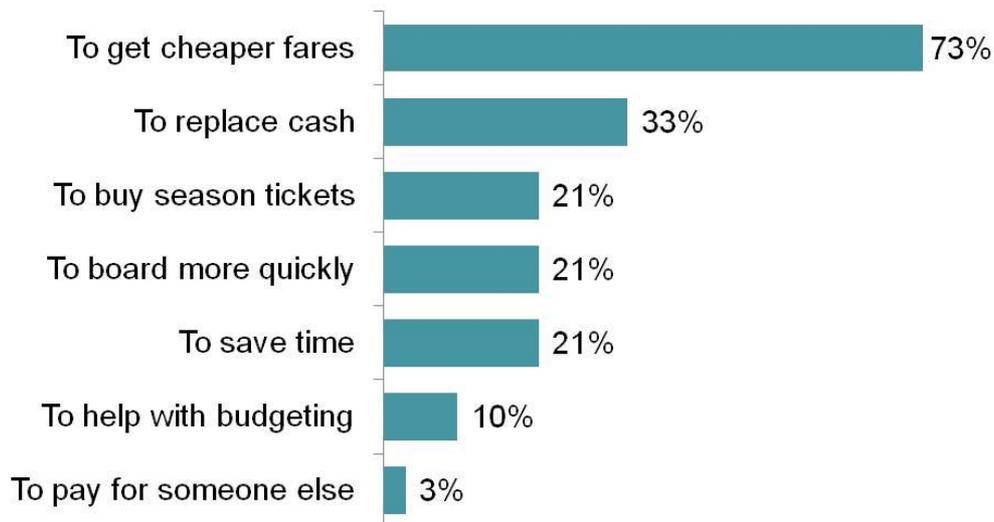
Quantitative data also suggests that age may play a role in determining the importance of some of these benefits to passengers. While all age groups gave cheaper fares as the main reason for getting the card, the 18-40 year olds were also significantly more likely to highlight access to season tickets as another important reason. 83% of respondents in this age group were also working and were therefore commuters, which explains why being able to buy season tickets is particularly important to them.

This suggests that many passengers felt they did not have any choice but to get the holdall® in order to keep the cost down after the price increase, and be able to buy certain tickets. However, some passengers did concede that now they had their holdall smartcards®, they also appreciated other benefits.

> *"I got it because I had no other option due to price increases. I can't afford the full price to get to work!"* [User comment from the online survey]

> *"I had no choice (like a lot of others) but to apply for one of these. (...) All of a sudden, I was told I could not purchase a ticket on the bus and would have to apply for the smartcard."* [User comment from the online survey]

Reasons for NOT getting a holdall®

Most non-users in our qualitative in-depth interviews explained they did not consider getting the holdall® because they assumed the card was not relevant to them.

The non-users who had seen the holdall® communications thought they did not use the Park and Ride service enough for the card to be useful to them. They stressed they had thought the smartcard was intended for passengers who travelled daily or a few times a week. For example, some thought the card had to be used on consecutive days for it to be cost-effective, or that tickets would expire before they were able to use them fully.

> *"I wasn't interested before because I'm an occasional user so there wasn't much urgency."* [Male, 56, Non-user, Norse]

> *"I'd vaguely seen advertising with holdall® on it but it must have passed me by because I had no idea it was to do with Park and Ride!"* [Male, 59, Non-user, Konect]

> *"I had seen the signs but I hadn't taken any time to actually read them!"* [Female, 54, Non user, Norse]

Some respondents from both the in-depth and intercept interviews also gave other reasons. Some reported simply being unaware of the card or not understanding that the holdall® had any relevance to buses and Park and Ride. Others appeared to lack motivation as they felt there was no urgency for getting the card, rather than having any specific objection to it. A few others explained they might be inclined to apply if they did not have to do everything online, suggesting the online application and account were a barrier for some.

However, our qualitative data also suggest that once non-users are better informed about the card and the different tickets it can be used for, most change their mind and see that they could benefit from having the holdall®. This was evident in the response of non-users in the in-depth interviews who were tasked to apply for the smartcard, receive and use it before the interview. When they realised there were tickets that suited their less frequent and

irregular patterns of travel – for example, 10 day saver tickets – they became much more interested in using the card. Helping non-users understand how saver tickets and sQuid travel purse work may therefore raise interest in getting a holdall®.

Expectations and assumptions about the holdall®
Qualitative data suggest that passengers' expectations of the holdall smartcard® were often based on their experience of an Oyster card, or what they heard about from others. Respondents used an Oyster card as a reference point expecting the holdall® to be the same.

> *"A lot of my friends live in London and I have an Oyster card so I think that's why I felt more confident using it."* [Female, 33, User, Norse]
>
> *"I go to London a lot so I'm very familiar with the Oyster system."* [Male, 31, User, Norse]
>
> *"[Passengers] still think that everywhere you go in London, you just slap your card on and it takes money and the money appears on there magically. It all works well in London and they were just expecting it to be the same."* [NCC staff]

With the exception of a few non-users, who wondered whether they may need to 'swipe' the card, most respondents expected to use the holdall® in the same way as Oyster, that is, by tapping it against the reader. They also expected the holdall® to have the simplicity and flexibility they associated with an Oyster card. For example, they expected the readers to take the 'right amount of money' from their card irrespective of what they had on it or when they travelled. Some therefore found the limitations of peak and off-peak tickets, or having to tell the driver if they wanted to use the sQuid travel purse, frustrating.

> *"The simplicity of the Oyster card isn't replicated in the holdall®... I'd prefer it to be more flexible so that it takes off the right amount when you travel but that you also get the discount."* [Female, 30, User, Norse]

Familiarity with an Oyster card made some question how they should use their holdall®. For example, some reported being unsure initially about whether they also needed to tap out when leaving the bus. Others wondered why they needed to tap in on the way back from town as they thought the day ticket would have been charged in the morning.

"I'm not sure why you need to tap back on again in the evening because you must have used it to get on in the morning."
[Female, 33, User, Konect]

"I wanted to know how it would work, like, if you needed to tap it when you get off too." [Female, 33, User, Norse]

Most importantly, passengers wanted the holdall® to be flexible so they didn't have to worry about when they could and could not travel with it.

"It would just make so much more sense to have it like Oyster! Then I wouldn't have to worry what service I was getting on!"
[Female, 54, Non user, Norse]

Application process

The application process meets customers' needs for a familiar and short process and has a positive impact on their impression of the brand. However, some aspects of the application process presented issues for some passengers.

Respondents in our qualitative interviews generally felt the application process was familiar, and similar to what they were used to elsewhere online. Some stressed they were pleasantly surprised that it was a short application, that they were only asked relevant questions and they liked being kept informed by email. Furthermore, all reported being very satisfied by how quickly they received their card and some were impressed and felt reassured about the service.

"Yeah that was really good! I must admit when I saw application I thought "Oh no!" because some of these things just go on forever! But in actual fact it was really, really easy and really, really quick." [Female, 54, Non user, Norse]

"It was really easy. It didn't ask me to do anything weird. I think it's just what you'd expect...It's a bit like registering for your Oyster card." [Female, 33, User, Norse]

"It came so quickly! I was really surprised! So quick, it was really nice!" [Female, 50, Non user, Konect]

The survey of holdall® users supported this:
- 68% of users thought it was easy to understand how to apply for a holdall®
- 70% of users thought it was easy to apply for a holdall®
- 31% of users received the card in 1-3 days and 54% in 4-7 days
- 75% of users thought they received their card quickly.

However, there were some aspects of the application process that did not work as well for all passengers.

NCC customer support staff and some smart ticketing team staff reported being contacted by passengers about the following issues in the application process:

- Some users complained about needing to have unique email addresses to open multiple holdall® accounts. This was particularly a problem for parents applying for holdall® cards for their children
- Some passengers objected to having to buy a season ticket in order to apply for a holdall®
- When the card was launched, some older passengers complained about having to apply online, suggesting this was discrimination against older people because they were made to pay more because they didn't have the internet.

> *"We have had complaints from customers of concessionary pass age who said they don't like the system because it's online."* [NCC staff]
>
> *"The separate email address. That has annoyed people. Particularly those with families who need to have cards for multiple family members."* [NCC staff]

NCC respondents from the smart ticketing team said they were considering changing the application process to address some of these issues. They hoped to allow passengers to use the same email address for multiple accounts. They would also like to give passengers an option to pay a small fee rather than have to buy a season ticket to get the card.

> *"Some customers didn't want to buy a season ticket in order to get the card."* [NCC staff]
>
> *"We would like to change the application so that a parent can sign up and open children's accounts with one email address."* [NCC staff]

However, they were not considering allowing customers to apply and manage their account through a customer facing service rather than online. They stressed that complaints about the online-only service dropped significantly after the first few weeks following the launch. They did not therefore feel that this remained an issue for a significant number of people. They also said that the council has ensured public libraries can help anyone use the internet and set up their holdall® account.

> "*Although we have had a few people that the online stuff is difficult, they are very small in number of our overall customer base. We are aware that people with concessionary pass age are quite happy to purchase holdall® cards and the concessionary tickets. So I think there was initially resistance to change but it certainly hasn't proved to be as bad as I thought [initially].*" [NCC staff]
>
> "*Our libraries provide free internet access and staff can help people get online and there are also courses that people can do to get them more confident with using the internet.*" [NCC staff]

In addition to the issues discussed above, finding and understanding information about fares proved to be the main difficulty for some passengers in the application process. Many respondents in our qualitative sample said it was difficult to understand all the fare options and to be sure they were choosing the best one for them. Some also said they could not find the information about the fares and thought it was not provided.

> "*It was almost like it was asking me to make decisions and go down a path before knowing what that path was leading to or what the decision would lead to. You need all the options laid out in advance. There wasn't that front end info!* [Male, 56, Non user, Norse]
>
> "*I would have quite liked to have bought a monthly pass but I'm not sure the option was there.*" [Male, 51, User, Norse]
>
> "*It should have been clearer that you can only buy one type of ticket for your card. It's quite confusing and it didn't make it clear that that was the system. If there'd have been a line explaining you only pick one I wouldn't have spent time trying to find that out.*" [Female, 54, Non user, Norse]
>
> "*I do think that all the things that they've changed with the fares have made the Park and Ride a lot more confusing for one off users.*" [Female, 33, User, Norse]

Beyond 10 day saver tickets and the annual season ticket, awareness of fare options and products was limited. Some passengers were unaware of other season tickets or sometimes had misconceptions about them - for example, that weekly tickets were valid for seven consecutive days. Discussion also revealed very low awareness and understanding of the sQuid travel purse.[15]

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[15] For more detail about passengers' response to the sQuid travel purse see pages 45-46.

"I got the £10.20 off peak [weekly season ticket]. It's valid for a year but as soon as I started using it you get 7 days. So that's not like the 10 day one. So looking back that would have been much better to get the 10 day one because I'll probably only use it once more this week." [Male, 59, Non user, Konect]

"What's this sQuid thing? Must confess I didn't know about that before." [Male, 51, User, Norse]

Quantitative data confirmed that finding and understanding fare options can be a difficult part of the application process for some passengers. Significantly fewer passengers agreed that it was easy to understand peak and off-peak times and which tickets can be bought with a holdall®, than thought it was easy to understand how to apply and to actually apply[16]:

This suggests that the perceived complexity of fares, and the lack of information about them, make it cumbersome for some passengers to apply for the card and buy the tickets.

"I do find when you go to the online account it's quite confusing with the peak and non-peak, now they're sub-dividing it, it's a very complex ticketing structure." [Male, 51, User, Norse]

"There are so many different fares. It seems too fragmented to make sense to people." [Female, 33, User, Norse]

As with the other complaints discussed, there was some awareness among NCC smart ticketing staff that the fare structure appeared complicated to

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[16] Q3. On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult was it to... (Base – All respondents – 392)

some passengers and that they struggled to understand all the options. Some staff explained they would like to be able to simplify the products in future.

> *"It seems that products are too complicated for some passengers."* [NCC staff]
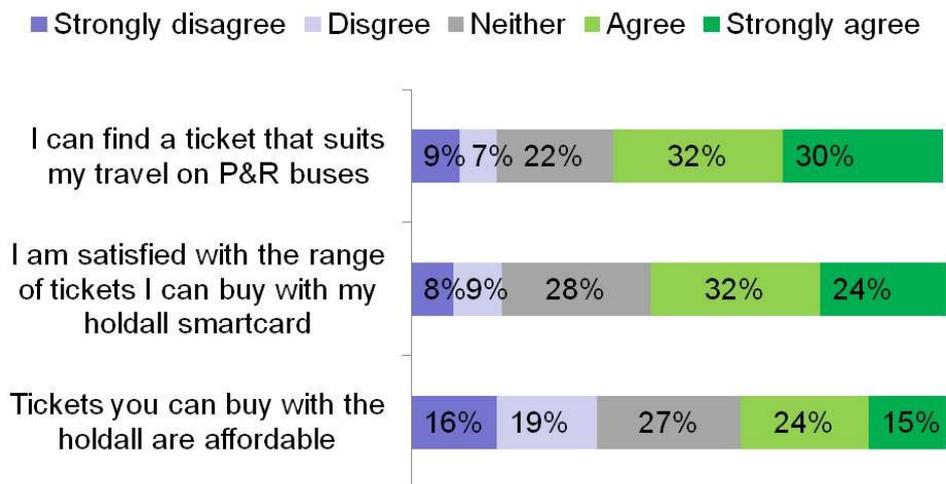>
> *"Some customers misunderstood about the weekly season ticket and thought it's not for consecutive days".* [NCC staff]
>
> *"I would want the products to be simpler – that you're either charged for single tickets for appropriate times and season tickets are not peak and off-peak."* [NCC staff]
>
> *"Well, I personally want to see it come down to: you have to tap your smartcard in on every journey and you'll get charged the price appropriate to that time you travel."* [NCC staff]

Choosing the right product
Despite difficulties in understanding the fare options, most holdall® users completing the online survey felt they could find a ticket which suited their travel. However, significantly fewer users agreed that these tickets were affordable[17]:

Legend: ■ Strongly disagree ■ Disgree ■ Neither ■ Agree ■ Strongly agree

Statement	Strongly disagree	Disgree	Neither	Agree	Strongly agree
I can find a ticket that suits my travel on P&R buses	9%	7%	22%	32%	30%
I am satisfied with the range of tickets I can buy with my holdall smartcard	8%	9%	28%	32%	24%
Tickets you can buy with the holdall are affordable	16%	19%	27%	24%	15%

There were no significant differences between frequent and infrequent users in terms of satisfaction with the range of fares, suggesting the fare structure allows the majority of frequent and infrequent users to find the ticket that fits their pattern or travel.

Frequent users were, however, significantly more likely to have an issue with the price rise as they felt more affected by it than infrequent users. Of the

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[17] Q17. On a scale from 1 to 5, where 1 is strongly agree and 5 is strongly disagree, to what extent do you agree or disagree with the following statements? (Base: All respondents: 392)

holdall® users travelling almost daily, 45% disagreed that tickets bought with a holdall® are affordable, compared with 22% of those who travel a few times a month and 13% of those who travel less often.

The quantitative research found by far the most popular type of ticket with holdall® users is a 10 day saver ticket followed by an annual season ticket, as shown below[18]:

Daily users	A few times a week	Once a week	Less than once a week
63% have 10 day saver tickets **31%** have annual season tickets **1%** have sQuid e-purse	**94%** have 10 day saver tickets **2%** have annual season tickets **10%** have sQuid e-purse	**70%** have 10 day saver tickets **2%** have annual season tickets **20%** have sQuid e-purse	**72%** have 10 day saver tickets **2%** have annual season tickets **12%** have sQuid e-purse
Base: 121	Base: 103	Base: 46	Base: 113

A significant proportion of frequent holdall® users aren't making the most of the cost savings they could get with the annual season ticket, suggesting they may prefer the flexibility of saver tickets. The Park and Ride pricing structure provides some clues why. Although they would save money with the annual season ticket, other season tickets might end up costing them about the same or possibly more than 10 day saver ticket if they do not travel on Saturdays too.[19]

> *I don't agree that when purchasing 4 weekly tickets for almost £60 it only last 28 days from when you first use it, I only use park and ride 5 days a week therefore I am losing 8 days worth in a month. Seems unfair considering how much they cost!* [User comment from the online survey]

The qualitative research revealed more about passengers' rationale for choosing different types of tickets and their perceptions of them.

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[18] Q10. Which of the following do you have on your holdall® at the moment? (Base: All respondents: 392). Distribution of different tickets across the whole sample of 392 holdall user respondents was as follows: 9% have sQuid travel purse; 74% have 10 day saver tickets; less than 1% have weekly season tickets (only 1 person); 1% have 4 week season tickets; 1% have 12 week season tickets; 11% have annual season tickets.

[19] See Norfolk County Website for more information on Park and Ride fares

Some frequent users reported making a cost effective choice in buying an annual season ticket, but others thought they could not afford it. Some frequent users with 10 day saver tickets also explained they did not want to commit for a year as they were not sure if their circumstances would change. Less frequent users, who travel a few times a week and less, also highlighted wanting the flexibility that the 10 day sever ticket allows. They felt this type of ticket fitted well their irregular pattern of travel on Park and Ride buses.

> *"The annual fare fits with how I'm commuting. And you don't have to worry about it, you can just travel whenever."* [Male, 24, User, Konect]
>
> *"I bought a peak 10 trip saver. When I got the card, initially I wasn't sure if I was going to do a combination of using the bus and using Park and Ride, so I went for the 10 trip which seemed about right to try it out. (...) Obviously an annual ticket would be good value but I might not have a job in six months!"* [Male, 51, User, Norse]
>
> *"For commuters such as me an annual ticket is very expensive. Maybe a direct debit scheme could be offered where this payment could be split into 12 instalments as it is cheaper and easier than remembering to buy monthly tickets."* [Online survey user comment]
>
> *"I got a 10 trip ticket over a 12 month period. Given I'm an infrequent user I liked the fact I had a longer time period to use it in."* [Male, 56, Non user, Norse]
>
> *"It makes sense for me to get the 10 trip ticket because I work part time. So if I was working more hours, like around Christmas I usually work full time, then I would look into getting a season ticket."* [Female, 33, User, Konect]

The majority of holdall® users - 69% - tend to buy anytime tickets, compared with 21% who had off-peak tickets. This prevalence of anytime tickets is directly linked to the predominance of working and commuting passengers in our holdall® sample, who tend to travel in peak times.

However the qualitative data suggests that many holdall® users are frustrated by having to commit to peak or off-peak tickets. Off-peak ticket holders reported feeling frustrated that they had to monitor and plan their time of travel if they wanted to avoid incurring more cost. Anytime ticket holders, on the other hand, reported feeling frustrated when travelling in off-peak times as they felt they were wasting money if they used their anytime tickets. Some were aware they could get other products for travelling in off-peak times but

said needing to have more than one thing on the card meant it was not as easy as they wanted the holdall® to be.

> *"The drawback is committing to the peak, off peak thing. I don't know what I'm going to do in advance!"* [Female, 54, Non user, Norse]
>
> *"I'm losing out if I use my holdall® on a Saturday. I'd just pay cash or drive."* [Male, 31, User, Norse]

While many passengers expressed such frustrations at the limitations of peak and off-peak tickets, they often did not understand they could use sQuid Travel Purse to get around these difficulties.

With the exception of a sQuid travel purse user interviewed in this research, other respondents had either heard about the sQuid travel purse for the first time during their interviews or had a vague memory of hearing about it without understanding what it was.

> *"To be honest I glazed over sQuid because I'm an occasional user, I figured it wouldn't be relevant!"* [Male, 56, Non user, Norse]
>
> *"I got a letter explaining 'here's the card, what to do if you want to top up, and about the sQuid travel purse'. I didn't really get that. I thought it meant another card!"* [Female, 54, Non user, Norse]
>
> *"It seems bizarre to do another step, seems to be making it more laborious, and more difficult."* [Male, 51, User, Norse]

However, once the product was explained to them many liked the Pay As You Go (PAYG) concept and could see it being useful to them. In particular, they saw the sQuid travel purse as a good way of overcoming limitations of anytime and off-peak tickets. Passengers with anytime 10 day saver tickers thought this could save them money when travelling in off-peak times, as they would not have to use their anytime tickets to pay for off-peak travel. At the same time, off-peak ticket holders saw the sQuid travel purse as a good 'back-up' option for paying for travel during peak time. Other respondents became interested in using it to buy group (family) tickets at the weekend.

> *"I use the sQuid travel purse when travelling in peak times. I'm happy to have it as a back-up and also when my 10 day saver ticket runs out."* [Female, 30, sQuid travel purse user, Norse]

> *"It's just good that it offers me more flexibility. It would save me time not having to wait for specific off peak services."* [Female, 50, Non user, Konect]
>
> *"Oh I see, that sounds like a really good idea! I can see the benefits in that! The added flexibility is good and also there's an opportunity for tickets to be purchased at a reduced price which is always good!"* [Male, 56, Non user, Norse]
>
> *"I think it's a really good idea. I'm definitely going to be putting the money on mine because if I need to come back at peak then I can use that to cover the extra. It's just a way of covering your own back."* [Male, 59, Non user, Konect]

While these benefits raised passengers' interest in the sQuid travel purse in principle, many reported being put off by how it worked in practice. They said they did not understand why they needed a separate account and found this confusing and laborious. Many also thought that the minimum £15 for the sQuid travel purse was too high for a 'back-up' option they may only rarely use. They thought that a £5 minimum felt more appropriate. And passengers interested in using the sQuid travel purse for family trips were put off by the prices of group and children's tickets. They thought it would be cheaper for them to drive to, and park in, the city centre, so felt they were unlikely to continue using Park and Ride for weekend family trips.

> *"If you're going to get the bus into town on a Saturday you're better off paying with sQuid but I find that all a bit confusing! On the weekends we tend to drive in anyway because then I come in with my husband and we might as well park."* [Female, 33, User, Konect]
>
> *"I know I can use sQuid but the minimum top up was £15! That's a bit much for just those one off, just in case situations! So I didn't bother."* [Female, 54, Non user, Norse]

This suggests passengers would like to use their holdalls® to pay on a PAYG basis but the current set up is a barrier. Passengers would be more likely to use PAYG if:
- it was an option within the holdall® website
- the minimum amount was lower
- there was a financial incentive for using this method of paying.

> *"I would say you should be able to top up £5 just because if you're not going to use it that often it's quite a lot."* [Female, 33, User, Norse]

In addition to difficulties in understanding the different fare options and products, fare rises were found to be another factor making some passengers critical of the new Park and Ride fare structure.

The qualitative research suggests many passengers accepted fare rises as inevitable, as they could see that the cost of living was going up across the board. However, they felt fares had increased drastically. In particular, some stressed that the newly introduced children's fares and higher group fares meant that Park and Ride became more expensive than parking in the city centre.

> *"I think everything goes up so you expect the prices to go up but I did think it was a lot!"* [Male, 31, User, Norse]

Some passengers were also critical of what they saw as ulterior motives of NCC behind the fare rise. Some were convinced the fare rises were introduced to fund the holdall smartcard®. Others felt they were forced to get a holdall® by the council, as paying by cash became too expensive, and they were irritated by a tactic that did not leave them a choice.

> *"Doing the trick of rising [cash] prices isn't right. People aren't stupid. I'd rather they just be honest. They're treating us like idiots and I don't like that."* [Female, 54, Non user, Norse]
>
> "*It was a poor decision to put the prices up and introduce holdall® at the same time. They should have introduced holdall® first and waited to introduce the price rise. The problem that you have is that people think holdall® led to the price increases.*" [Male, 51, User, Norse]
>
> *"I put the fare rises down to the fact that they were trying to raise money back for all the money they spent on putting the new [holdall®] system in."* [Male, 24, User, Konect]

Most passengers thought the changes to the fares should not have been introduced at the same time as the holdall®. Some felt this meant that passengers had to deal with too many changes at the same time.

Comments about the fare increases also showed that some passengers found it hard to separate their response to the new fare structure and pricing from how they felt about the holdall smartcard®. Effectively, the link between the fare increase and the launch of the card made some potentially less positive about the holdall® than they would otherwise have been.

> *"It was a bad idea because people were too busy arguing about fare rises to embrace the card."* [Female, 33, User, Konect]

> *"I don't see any downsides to the card itself. It's just the cost."*
> [Female, 33, User, Norse]
>
> *"What I've been hearing about the cards has been positive, but not about the price rises. The cards are easier to use and harder to lose and won't break when they get wet. But the price went up which was the only problem really."* [Male, 24, User, Konect]

Using the card on the bus

Most passengers were positive about the ease of using the holdall®. They said they were used to paying by cards in general and so using a smartcard to pay for travel was not a barrier.

Passengers generally did not remember having any particular concerns about the card before they used it for the first time. However a few noted they had felt slightly apprehensive, wondering whether it would work. These passengers were generally reassured by knowing they could ask the driver for help if they had any problems.

> *"I assumed it couldn't be anything too complicated! A lot of elderly people use [concessionary] cards on the buses."* [Female, 50, Non user, Konect]
>
> "*Before we used holdall® I expected it to be the exactly the same as using [my over 60] travel card on the normal bus – you just put it on and it buzzes then takes it off.*" [Male, 73, User, Konect]
>
> *"I expected holdall® to be easy to use - I've got a door fob with the same sort of technology and I've been using it for years."* [Male, 24, User, Konect]
>
> *"I did think it would be easy because I thought it's being aimed at such a wide audience, older people like me who get confused easily!"* [Female, 54, Non user, Norse]
>
> *"I was a bit worried that it wouldn't work, the machine might be broken or something but I haven't had any problems."* [Female, 33, User, Konect]

Thinking about the first time they used the card, respondents reported being pleased that using the card was straightforward and easy. A few who were less familiar with smart ticketing and had expected they would need to swipe the card were pleasantly surprised that it was easier than they thought it would be.

"I understood what I needed to do when I first used my holdall®. I'd watched what other people do and just put the card on the reader. Then it bleeps and the ticket comes out. It's quite straightforward." [Male, 51, User, Norse]

"It was pretty much what I expected. (...) Hold it over and some barcode reader picks it up and away you go!" [Male, 56, Non user, Norse]

"We haven't had any problems using the card. The bus drivers on the Park and Ride are very good." [Male, 73, User, Konect]

Some passengers observed that it takes a bit longer for the ticket machines to read the smartcard than they would expect. Bus drivers also remarked on this, noting that the first time passengers use the holdall® they often have to tell them to hold the card on the reader for longer. However, this was not perceived as a major issue, so much as something they were surprised does not work better.

"It takes a good 2-3 seconds before it decides if it's been successful and sometimes you have to do it again." [Male, 31, User, Norse]

"The card is very slow to register on the readers on the bus. Technology seems much slower than 'Oyster cards'." [Online survey user comment]

The research found some differences in customer satisfaction in using the card are dependent on the products passengers had. Passengers with season tickets generally did not have any issues to report about how their card worked on the bus. However, passengers with 10 day saver tickets had a varied experience. Some said that they wanted bus drivers to give them receipts showing how many journeys they had left and were frustrated when they did not get those receipts. Others were getting receipts but did not want them as they thought getting pieces of paper defeated the purpose of smart ticketing.

sQuid travel purse users thought that paying by sQuid was too complicated. Some said they did not know they needed to tell the driver that they wanted to pay with the sQuid travel purse the first time they used it. They expected the reader to take the right amount of money and were surprised this was not how it worked. Some bus drivers complained that issuing tickets bought through the sQuid travel purse involved too many steps.

This feedback indicates that having to do anything more than simply place the card on the reader goes against some passengers' expectations of a smartcard, making them feel the process isn't as simple as it should be.

Both the quantitative and qualitative research found some passengers had difficulties in collecting the products they bought. As the chart below shows[20], while the overwhelming majority of passengers agreed that using the card on the bus was easy, a significantly fewer number of passengers agreed that collecting the tickets on their cards was easy:
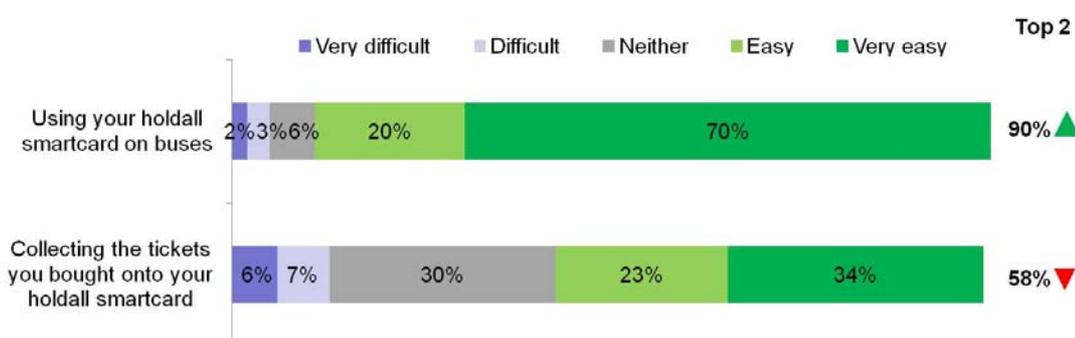
The qualitative data sheds light on these difficulties. Some respondents reported not being able to use tickets bought the previous day in the morning, because they were not uploaded on their card. Bus drivers consulted in this research also claimed this was a common problem for passengers.

> *"There still seem to be some little quirks when buying 10 trip tickets online - I experienced a delay of 2 days before my holdall® ticket was up-dated recently."* [Online survey user comment]

Other respondents complained about automated help points not working at times, meaning they could not check the number of journeys they had on their card or collect the product they had bought before boarding the bus. This was particularly an issue for Konect bus users, as help point machines at their Park and Ride sites did not work whilst the fieldwork was carried out for this research.[21] This difference in customer experience is further reflected in the quantitative data, as 17% of Konect bus users thought collecting tickets was difficult, compared with a significantly fewer number of Norse bus users, 9% of whom felt the same way.

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[20] Q12. On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult do you find... (Base – All respondents – 392)

[21] Konect bus drivers reported this problem and it was also observed by researchers. Based on interviews with NCC staff, this problem was due to the interoperability issues between help point machines and ticketing machines on Konect buses which were supplied by different companies.

> *"Help point was out of order at the crucial time. It is not always convenient or possible to look up online how many journeys you have left on your ticket."* [Online survey user comment]

Some NCC smart ticketing team staff said they were aware of this problem. They explained they have already taken steps to solve these technological problems and reduce the likelihood of passengers experiencing these issues.

Using the online account

Passengers in our qualitative research viewed the online holdall® account as purely functional. As a result, they wanted to be able to complete tasks as easily and quickly as possible and had little interest in the account beyond this.

> *"I didn't think anything really. I see it as a means to an end. I want to hurry, do what I've got to do and get on with my evening."* [Female, 54, Non user, Norse]

With the exception of annual season ticket holders, who felt they had no reason to log into their account, the main reason for passengers logging in was to top up their cards. A few passengers with 10 day saver tickets recalled also occasionally logging in to see how many journeys they had left.

> *"I would only use the online account when I want to renew my ticket. I used it then to do that. I haven't logged in since."* [Male, 73, User, Konect]
>
> *"I wouldn't really want to do anything else with the online account. It's just literally a way of getting on the bus, as long as I could get something if I wanted to – maybe to change my address or phone number if I needed to."* [Male, 24, User, Konect]
>
> *"I really like that where it tells you how many tickets you have remaining! That's handy! You wouldn't be caught out on the bus not having any credit!"* [Female, 50, Non user, Konect]
>
> *"I haven't checked it since I got it. It would be until the end of the year. I can't really remember what it was like but it seemed pretty straightforward."* [Female, 33, User, Annual season ticket holder, Konect]

Passengers gave a mixed response to seeing their journey information. While some thought it was helpful to have access to this record in case something

went wrong, others felt the information was too detailed and not easy to understand.

> *"See, I don't know why it tells you all of this? You just need to know what time you got on and the date. It's a bit complicated."*
> [Female, 33, User, Norse]

The chart below[22] shows how frequently holdall® users log into their account:
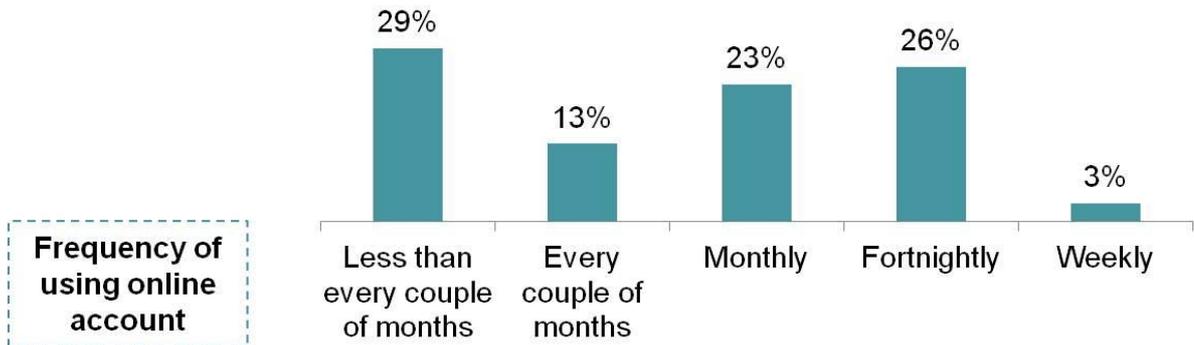
As could be expected, more regular users of Park and Ride services log into their accounts more often to top up their cards than the less regular users. Passengers who travel almost daily or a few times a week are significantly more likely to log into their account on a fortnightly basis, 51% and 33% respectively, than passengers who travel less often than this who tend to log in every couple of months or less. The exception to this are the annual season ticket holders, 88% of whom travel almost daily but 70% of whom log in less than every couple of months.

The quantitative data indicates that over a half of holdall® users think it is easy to use their holdall® account to find information and buy tickets[23]:
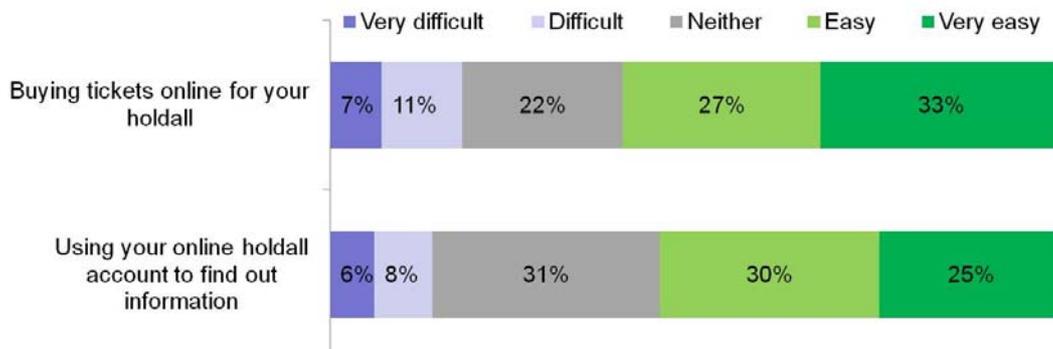
Passenger Focus – Norfolk bus passenger research - phase two report 54

However almost a fifth of passengers do find buying tickets difficult and 14% feel it is difficult to find information. The qualitative research sheds light on some of the difficulties experienced by holdall® users.

Some holdall® users missed important information about fare options because it wasn't where they expected it to be - they expected and wanted all relevant holdall® information, including information about fares, to be on the holdall® website. They therefore missed information when it was hosted elsewhere, for example, on the Norfolk county council website. Specifically, they missed the link on the holdall® website pointing them towards the pages with fare information on the council website. This made them think there was no information about fares, frustrating them that they could not make a fully informed choice.

This suggests that hosting all relevant information, including the different fare options, on the holdall® website would make it easier for users to find it and help them make an informed choice. It would also potentially make the holdall® account seem more comprehensive and streamlined, as even those who found the information on the NCC website felt that it was disjointed to be hosting this information on different websites.

> *"What was less straightforward was the information about the different fares and things."* [Male, 31, User, Norse]
>
> *"The website wasn't clear, I didn't understand the different season tickets you could have, it didn't explain sQuid well."* [Female, 54, Non user, Norse]
>
> *"I feel that they got the sequence or order of information not quite right, it should outline what the options are and then once you know that you should be able to proceed with the option that suits you."* [Male, 56, Non user, Norse]
>
> *"I found all the information I needed. Although that information was on the NCC website rather than the holdall® website, it seemed a bit disjointed. From a user experience point of view it would be better if it was all on the same thing."* [Male, 31, User, Norse]

The qualitative findings also show that some holdall® users buying tickets through their online account are concerned that they cannot buy a different type of ticket to the one they bought initially. This led some to see the holdall smartcard® as inflexible, because users had to commit to one type of ticket and could not change. This suggests passengers' experience would be significantly improved if they were able to buy different tickets to suit their changing circumstances.

> *"It should have been clearer that you can only buy one type of ticket for your card, if there'd have been a line explaining you only pick one I wouldn't have spent time trying to find that out."*
> [Female, 54, Non user, Norse]

A few respondents also complained about not being able to buy 10 day saver tickets in bulk anymore, which they had been able to do with paper tickets. This further added to some users' perception that the holdall® card was inflexible.

> *"I find it a bit of a retrograde step from the ticket I used to buy as now I have to go online every 10 days and top up, and the pricing structure feels quite inflexible."* [Male, 51, User, Norse]

It also meant that frequent passengers with the 10 day ticket had to remember to top-up their card more frequently than had been the case with paper tickets. Some felt that having to log into their account every couple of weeks to top-up was too time consuming. They stressed there should be other ways, including auto top-up and being able to use help points at Park and Ride sites to top up. Overall, the research suggests that enabling auto top-up is likely to significantly improve the ease of topping up for some users. NCC smart ticketing team respondents reported being aware of this and explained they would like to introduce it in the future.

> *"Now I have to go online every 10 days and top up and the pricing structure feels quite inflexible."* [Male, 51, User, Norse]
>
> *"With the 10-day ticket you can't do an auto-top up because it's classed as a season ticket....a colleague of mine had assumed that it would automatically top up and then found he couldn't use it when he got on the bus."* [Male, 31, User, Norse]
>
> *"Time consuming, having to log on and all these things when you just could pay on the bus. People are too busy and can't be bothered. It's another thing to add to your list of a million things you haven't achieved already!"* [Female, 54, Non user, Norse]
>
> *"They've got an information point at the Park and Ride station but all it will do is check how much you've got on your card. You should really be able to top up there. That would make more sense."* [Male, 31, User, Norse]

Experience of customer support

The quantitative research suggests the majority of holdall® users did not need customer support beyond that provided by bus drivers.[24] Bus drivers tend to be the main port of call for queries that don't require technical help, which further underlines how essential their role is in informing passengers and ensuring a good customer experience:
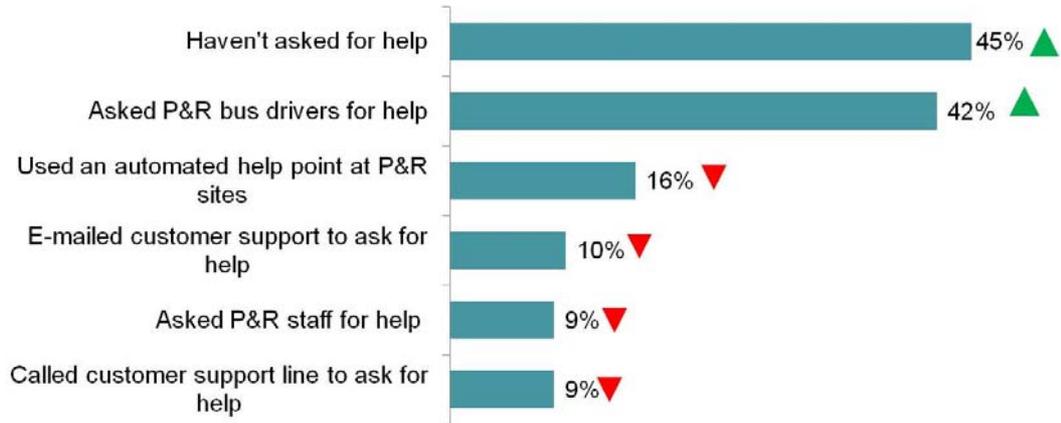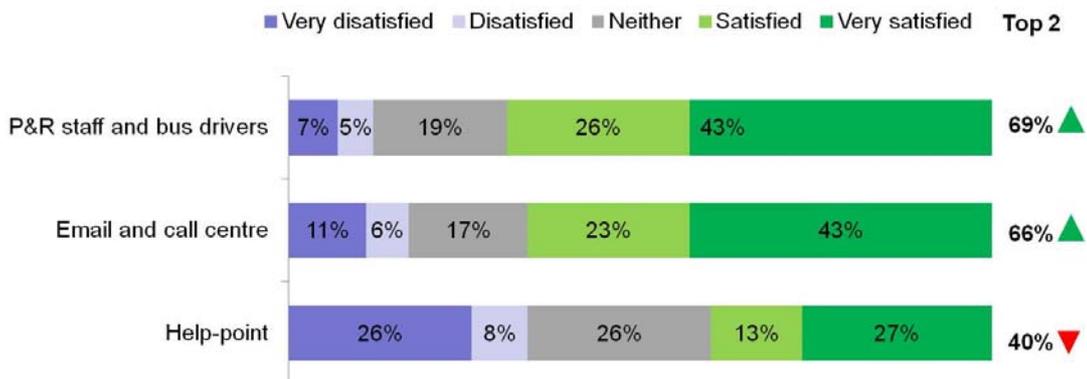

> *"I haven't had it go wrong so I haven't needed to ask for help".*
> [Male, 24, User, Konect]

Those who did contact NCC customer support service were satisfied with the service provided. Customers were, however, significantly less likely to be satisfied with the service provided through automated help points at Park and Ride sites[25]:

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[24] Q14. Have you done any of the following? (Base – All respondents – 392)

[25] Q14a. On a scale of 1 to 5, where 1 is very satisfied and 5 is very dissatisfied, how satisfied or dissatisfied were you with customer support you received from staff? (Base: 175)

Q14b. On a scale of 1 to 5, where 1 is very satisfied and 5 is very dissatisfied, how satisfied or dissatisfied were you with customer support you received by phone or email ? (Base: 65)

Q14c. On a scale of 1 to 5, where 1 is very satisfied and 5 is very dissatisfied, how satisfied or dissatisfied were you with customer support you received by using an automated help-point at a Park and Ride site? (Base: 62)

As mentioned above, NCC smart ticketing team respondents explained the steps already taken to solve technical problems with help points. The research suggests that some of the dissatisfaction may be linked to passengers' expectations that they should also be able to use help points for topping up.

5.3 Passengers' views about the holdall®

Both the quantitative and the qualitative data suggest passengers generally approve of Norfolk County Council introducing smart ticketing on buses, but that they have some issues about how the holdall® was introduced and how it works.

These mixed feelings were evident in holdall® users' response in the online survey. Over half of the users who completed the survey linked positive values to the holdall®, agreeing that the introduction of the card shows that Norfolk is being modern and innovative in their approach to transport. However, they were significantly less in agreement with the statements suggesting that the card has improved passengers' travel experience or that it shows Norfolk is providing affordable public travel[26]:
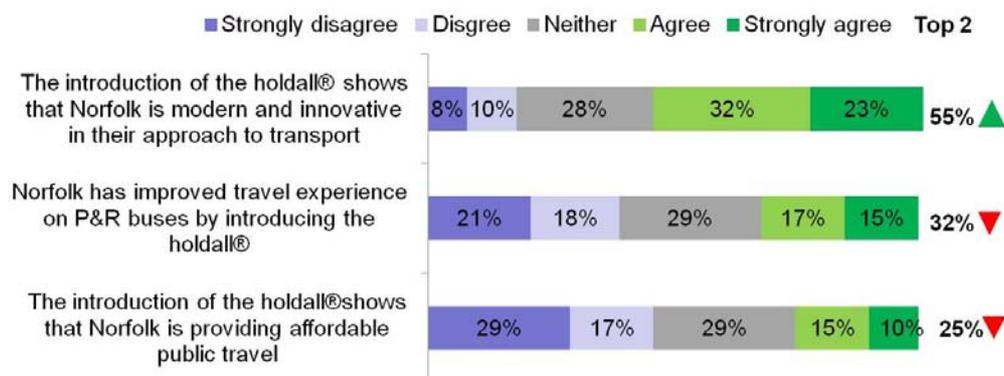
> "For us to have this on the park and ride is quite a big thing. You don't think of Norfolk as being ahead of the times... [It makes me feel] quite proud really. You'd expect it in big cities like Manchester." [Female, 33, User, Norse]

Benefits and drawbacks of the holdall smartcard®

The qualitative research confirmed this mixed response to the holdall smartcard®, also clarifying which its aspects passengers appreciated, and what they wanted to work differently or better.

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[26] Q16. On a scale from 1 to 5, where 1 is strongly agree and 5 is strongly disagree, to what extent do you agree or disagree with the following statements? (Base: All respondents 392)

In addition to being positive about Norfolk keeping up with modern technology by introducing the smartcard, passengers said they valued the following benefits of the holdall®:

- cheaper fares available with the smartcard
- convenience of not having to carry cash
- sturdiness of the card when compared to a paper (season) ticket
- reassurance that if the card is lost there is a record of the purchase in the database
- speedier boarding in the morning when fewer people pay by cash.

> *"A card's much sturdier than a paper ticket. You also get cheaper fares and you don't have to carry around change."* [Female, 33, User, Konect]
>
> *"In the morning it's speed, everyone just swipes and they're not having to find their change."* [Female, 33, User, Norse]
>
> *"It is convenient, there's no doubt about that."* [Male, 73, User, Konect]
>
> *"If you were to lose it, this would be easier to replace than paper ticket, as you have a record that you've paid for it."* [Male, 24, User, Konect]

There were other aspects where the holdall® did not fully meet some passengers' expectations but these did not make passengers overtly negative about the holdall®. They were phrased more in terms of potential areas for improvement.

For example, some passengers said they expected the readers on buses to be able to read the smartcards more quickly. Other passengers thought the card would be more useful to them if they could also use it on other buses, suggesting the perceived usefulness of the card may increase with the further roll-out of the holdall®.[27]

Some frequent passengers with 10 day saver tickets found the topping-up process time consuming and wanted to be able to top-up less frequently. They suggested the following ways of making the process more convenient:

- an auto top-up function on the portal
- topping-up using help point machines at the park and ride sites
- being able to buy saver tickets in bulk, which they had been able to do previously with paper tickets.

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[27] Quantitative data suggest that 37% of holdall® users use other buses but that this grows to 43% for 51-60 year olds and to 53% for 61+ year olds, indicating there is a good proportion of Park and Ride passengers who may appreciate being able to use the holdall on other buses too.

Many passengers highlighted other aspects of their experience with the holdall® that had a more negative impact on their views about the card. The two main issues concerned:
- changes to the fare structure and the pricing
- the perceived inflexibility of the smartcard.

As discussed previously, some passengers felt the fare structure became too complicated and that the prices rose dramatically. Some stressed that the changes were not communicated sufficiently well to passengers, resulting in longer boarding times during afternoon peak time as drivers had to explain the changes to passengers and handle peak upgrades.

> *"I think it's made me realise the limitations of the whole system. It's too complicated and I love Park and Ride but it's getting to the point where it's no longer value for money."* [Female, 54, Non user, Norse]
>
> *"I like the theory that it will speed things up although in reality that's not really been the case as the technology is a bit rubbish so it sometimes doesn't register straight away and on the way back there's always a fuss over the peak fares."* [Male, 31, User, Norse]
>
> *"It doesn't make any sense for me to get the bus if I'm with the kids so we would just drive."* [Female, 33, User, Norse]
>
> *"For me, the roll out of the card was fine. It was the fare rises that were the problem."* [Female, 33, User, Norse]

The perception that the holdall® was inflexible arose partly from the limitations of peak and off-peak tickets, and partly from the limitations of the web portal. Passengers expected the readers to be able to take the correct money from their card depending whether they travelled during peak or off-peak hours, rather than them having to monitor and plan their travel behaviour to fit around those times. They were also surprised the web portal did not allow them to buy a different ticket to that they had bought initially, and they found this strange and limiting.

Research suggests that certain changes to the fare structure, the web portal and the topping-up process may help solve some of the issues discussed above:

- Enabling auto top-up should go a long way to making the holdall® more convenient, even if passengers can't use help points to top-up.

- Allowing passengers to buy single tickets could reduce frustrations about the limitations of peak and off-peak tickets.
- Allowing passengers to change the type of ticket bought is likely to improve their experience of the holdall® and lessen the perception that the card is inflexible.

Key values of smart ticketing

Passengers taking part in the qualitative in-depth interviews were asked to assess the holdall® against the following key values associated with smart ticketing:[28]

- flexible
- tailored
- value for money
- convenient
- leading edge
- simple
- secure.

The holdall® was often seen to posses some values, but not others.

For the reasons outlined above, most passengers did not agree the holdall® was **flexible**. And they did not feel it was **tailored,** because it offered the same choice of tickets to everyone.

There was a more mixed response to other values. Many said they agreed the holdall® was **value for money** because the tickets were cheaper with the smartcard than with cash. However, they couldn't fully agree to qualify the holdall® in these terms because of the price rise, which many thought was dramatic. Most said they agreed that the introduction of the smartcard meant Norfolk was keeping up with times and being modern and innovative, but not everyone could fully agree that this was **leading edge**. A few respondents stressed Norfolk was not unique in this sense as other areas had smartcards, and they thought that contactless payment was a more leading edge way to pay for travel.

> *"Well, in London they're moving past the Oyster. Now they're starting to do contactless payment. It does make you wonder if they're investing in a technology which is going to have to be replaced in a couple of year's time."* [Male, 31, User, Norse]

Most passengers agreed that the holdall smartcard® was convenient, simple and secure. They thought it was **convenient** because it removed the need to

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[28] These values were based on the key customer requirements from smart cards established in previous research. (See Passenger Focus, *Smart ticketing – what rail passengers want*, July 2013, http://www.passengerfocus.org.uk/research/publications/smart-ticketing-what-rail-passengers-want-july-2013)

carry the right change to pay for bus travel. However, some also stressed that the topping-up process needed to be more convenient. They felt the smartcard was **simple** because they found using it on the bus straightforward. The only aspects of the card that did not appear to be simple concerned the fare structure and storing multiple products on the card - as already mentioned, this felt complicated to some. Passengers trusted the system that the card was **secure** and felt reassured their holdalls® would be cancelled if they lost them.

> *"It's simple in that parts of the process are simple, but the concept is overcomplicated with sQuid. Why couldn't they just have topping up holdall® with money and leave it at that! Then it would be ready for all eventualities."* [Female, 54, Non user, Norse]

Views about using the holdall® in other contexts

The quantitative data suggests there is an appetite to use holdall® to pay for bus and train travel, other than for Park and Ride services. And as shown in the chart below[29] just under half of passengers are interested using the smartcard to pay for parking, reflecting the appeal of the smartcard as a replacement for cash.
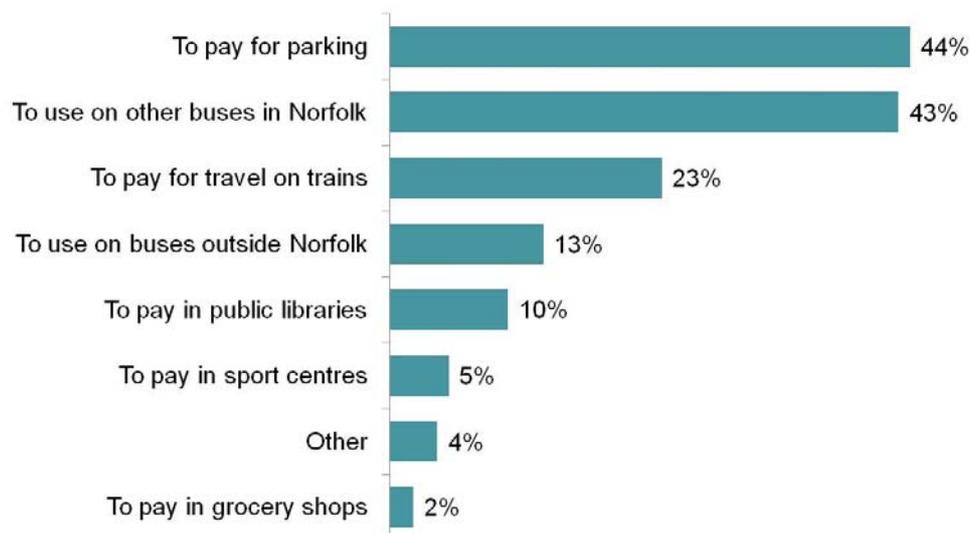
> *"It would certainly be good if the other buses had smartcards too."* [User comment from the online survey]

The qualitative research captured passengers' spontaneous suggestions for other areas where the holdall® could potentially be used. For example,

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[29] Q18. What else, if anything, would you like to be able to use your holdall smartcard® for? (Base: All respondents 392)

some thought the smartcard could be used to pay for other public and council services or for students to pay for their school lunches.

Data therefore suggests passengers may find the holdall smartcard® more appealing and beneficial as the card is rolled out to other bus services, and if its use is extended to allow it to replace cash in other places.

* * * * * *

APPENDIX 1 – Discussion guides

2028 – Passenger Focus – Norfolk Bus Passenger Pilot Phase 2

DISCUSSION GUIDE – Depth interviews with Non-users (1.5hrs)

Notes:

- *This Guide indicates the areas to be explored in the discussion, the likely order in which topics will be covered and the kinds of questions and techniques which may be used. There will be some flexibility of discussion, however, to account for each the individuals being interviewed.*
- *Not all respondents will respond to the same level of language or explanation. While the questions below detail how we intend to cover topics in our own 'language', efforts will be made to meet the communication needs of the individuals interviewed.*
- *Timings on the guide are approximate and give an indication of where the emphasis in the conversation will be.*

The overall aim of this research is to understand

- **To understand passengers' awareness, experiences and views regarding the 'Norfolk holdall smartcard®'**
- To understand bus operators' and NCC staff experiences of, and views about, the implementation of the smart ticketing scheme in Norfolk

To achieve this, we also need:

e) To understand passengers' experience of getting the smartcard
- How have they heard of the smartcard?
- Why did they apply to get the smartcard?
- What were their expectations from the smartcard? (How it will work, benefits, any concerns)
- What were their information needs at the point of applying? To what extent were these needs met?
- What was their experience of the application process? (Ease of applying, ease of understanding fares, speed of card arriving)
- What did they think of the card and accompanying materials once they arrived?
- What would they improve, if anything, about the process of applying?

f) To understand passengers' experience of using the smartcard
- When and where did they first use their card? Why then and there?
- What was that experience like? Was it clear what they needed to do? What were their initial thoughts? How did it make them feel?
- Did they need any assistance or support? If so, what for and how was this sought? How satisfied were they with customer support? Was their problem resolved? Was their overall experience of seeking assistance positive or negative? How could this be improved?
- What is their experience of using the online account like?
- How does paying by smartcard compare to the way they used to pay for their bus journeys before?

g) To gather passengers' views on how the scheme can be improved and rolled-out to further operators

- What could have been done better when introducing the holdall® on the Park and Ride services?
- What can we learn from this experience about:
    - What has worked well so could/should be repeated when the smartcard is rolled out to other services
    - What has worked less well so needs to be improved when the smartcard is rolled out to other services
    - What are both passengers' and staff views on how the process of introducing the smartcard ticketing scheme elsewhere can be improved?

Stimulus:

- A: Communication materials accompanying the card
- B: Screen grabs of online account (or access online account live if feasible)
- C: Characteristics cards (see appendix)

Intro and warm up (c.5 minutes)

- **Moderator**
    - *Introduce self, explain the process of market research to respondents (confidentiality and independence) and the format of the discussion*
    - *Explain topic of discussion is understanding experiences with regards to using the new smart cards on Park and Ride busses*
    - *Purpose is to gather their thoughts, opinions and ideas*
    - *Explain need for honesty/that there are no expectations around answers, etc*
    - *Permission to audio record*

- **Brief 'warm up'**
- Name(s), age, occupation
- Travel behaviour:
    - Frequency of travel on Park and Ride (P&R) buses
    - Which tickets they buy on P&R buses
    - Reasons for travel/where they go when they use P&R buses
    - Why they use P&R buses *(Moderator to listen out for spontaneous responses then probe: cheaper than paying for parking, more convenient)*
    - Whether they travel on other buses in Norfolk too *(Moderator to probe: which ones, how much they use them)*
- Comfort with new technologies/the internet
    - How they feel about using new technologies
    - How comfortable they feel using the Internet *(Moderator to listen out for anything respondents aren't comfortable doing online, e.g. shopping)*

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1. Re-visiting the accompanied journey

EXPLAIN TO RESPONDENTS that we would now like to hear briefly from them about their experience of using the smart card for the first time.

- **Initial experience of using Holdall**
  - o What did you expect using Holdall would be like before you used it now for the first time?
  - o How easy was it to use your Holdall? Did anything surprise you?
  - o Was there anything you weren't sure about in terms of what you should do? Or what should happen next? *N.B. If respondent encountered any difficulties, moderator to ask about these here. What were they thinking? How did this make them feel?*
  - o What did you like/dislike about using the card?
  - o What were you thinking as you used the card? How did you feel?
  - o What concerns did you have, if any? How could these be overcome?
  - o How likely do you think you'll be to continue using Holdall?

2. Prior awareness and expectations of Holdall

EXPLAIN TO RESPONDENTS that we would like to know about their experience of applying for and receiving the smartcard.

- **Awareness of Holdall**
  - o Have you heard about the Holdall smartcard before we asked you to apply for it?
  - o (As appropriate) Where did you hear about the Holdall smartcard?
    Probe as appropriate: friends and family, information notices / posters at Park and Ride sites / on Park and Ride buses, Norfolk City Council website, local radio / newspapers, saw other passengers using it
  - o (As appropriate) What did you hear? Positive/negative comments? *Moderator to establish where both positive and negative comments, if any, came from. Moderator to also listen out for any comments on P&R fare rises which were introduced independently from Holdall however at the same time, but do not probe at this point.*
  - o (As appropriate) What did you think/feel about what you heard about the Holdall card?
  - o Have you looked for any information about the Holdall card before this research? If so, where did you look? What did you want to know?
  - o Have you considered getting a Holdall card before this research? If yes, how come you haven't applied for it? *Moderator to listen out for whether respondents had specific reasons for not applying or whether they just haven't got round to doing it*
  - o If not, why not?

- **Expectations of Holdall**
  - o Before applying for the card, how did you expect it to work?
  - o What did you think the benefits would be as opposed to your usual method of paying? Anything else?
    Moderator to understand all perceived benefits. Do not probe but listen for: saving money, saving time, not having to carry around change, being able to buy tickets for others (e.g. children), liking to use new technologies
  - o What reservations/concerns did you have, if any?
    Moderator to understand all perceived drawbacks. Do not probe but listen for: fear of losing the card/it being stolen, uncertainty about method/how to use, uncertainty around fares, distrust of technology, not comfortable online
  - o What did you want to know about the card before you applied? What information did you look for, if any?
    Probe: How to use the card? Fares? Where it could be used/limitations around use? Using it in conjunction with discounts e.g. family tickets/children? Anything else?

- o Where did you look for information? How easy was it to access the information you wanted? Was there any information you couldn't find?
- o How could it have been made easier to access the information you wanted?
- o What did you think about what you found about Holdall? How easy was it to understand?
- o Could this information have been clearer? If so, how?

3. Getting the card
EXPLAIN TO RESPONDENTS that we would now like to talk to them about their experience applying for Holdall.

- **Applying for the card**
  - o How did you find the application procedure? What worked well/less well about it?
  - o How easy or difficult did you find the application process? *Moderator to probe: in terms of understanding what to do to apply; how simple or complicated applying was; how much effort was needed*
  - o Was there anything confusing? Was there anything surprising? If so, what?
  - o Did you get anyone to help you with applying? *Moderator to listen out for what specifically they needed help with*
  - o Did you already have an email address before applying for the card?
  - o Where did you apply? *Moderator to listen for spontaneous responses then probe if necessary: at home, at work, at public library*
  - o How did you feel about creating an account? *Moderator to listen out if respondents had any reservations about that, e.g. privacy, effort needed*
  - o Which type of ticket did you buy in order to apply? Why that ticket? How did you feel about having to buy a season ticket in order to get the card?
  - o Could the application procedure be improved at all? If so, how?

- **Receiving the card**
  - o How long did it take for your card to arrive? How did you feel about the speed the card took to arrive?
  - o What came with the card when you received it? Did you look at any materials that came with the card?
    - – If yes, what did you want to find out about? How easy was it to find that information? How clear was it? Was there anything missing in there? If so, what? What improvements would you make to it, if any?
    - – If not, why?
  - o Was there anything you were expecting in the pack that was not there? Anything additional to what you expected?

*Moderator to introduce **Stimulus A – Communication materials** and ask respondent to briefly look at them. Moderator then to explore the following questions:*

- o (As appropriate, if not covered before) What did you think about this information? How did reading this make you feel?
- o How easy was it to understand? Was there anything confusing/surprising?
- o How relevant was this information to you? Why yes/no? What were the most important pieces of information here for you? Was anything missing?
- o What could be improved about this information, if anything?

- o On the whole, how did you feel about the process of applying for and receiving your Holdall smartcard?
- o What, if anything, would you change about the process?

EXPLAIN TO RESPONDENTS that we would now like to find out how they feel about using the card in the future.

- **Interest in using Holdall in future**
  - o How likely would you be to use Holdall to pay for your bus journeys in future?
    - – (As appropriate) If so, why? *Moderator to fully explore different reasons respondent may have for wanting to use Holdall*
    - – In what situations would you use it? Are there any circumstances in which you would still prefer to use cash? Why yes/no?
    - – (As appropriate) If not, why not? *Moderator to fully explore different reasons respondent may have for not wanting to use Holdall*
    - – What could be done to make you more likely to use Holdall for your bus journeys?
  - o What impact, if any, do you think Holdall would have on your travel experience on Park and Ride buses?
    Moderator to listen to spontaneous responses then probe: saving time, a more relaxed travel experience
  - o What impact, if any, do you think Holdall would have on how you use Park and Ride bus services?
    Moderator to listen to spontaneous responses then probe: on frequency of travel, times of travel, bus services used

- **Fares**
  - o What fares are you aware you can get with your Holdall card? *Moderator to listen out for whether respondents are aware of the range of season fares and also that they can register for sQuid travel purse, add money to it and use it to pay for day and group tickets*
  - o What sort of fares would you be interested in getting with your Holdall card? Why those?
  - o What are their benefits/drawbacks to you? How do they fit with the typical journeys you make?
  - o Do you think you would ever buy any different fares? Why/when?
  - o Is there anything, in terms of the types of fares offered, which could be improved?
    Moderator to focus respondent on <u>types of fares rather than actual prices</u>

  - o What do you remember hearing about fare rises on P&R buses when they were introduced? What did you think about that at the time? How did you feel about it?
    Moderator to listen out for whether price rises are linked to the introduction of Holdall but do not probe now
  - o What difference have the changes to the fares on P&R buses made to you, if any?
    Moderator to listen out for spontaneous responses then probe:
    - – *Have they changed when you travel on P&R buses/how often you travel/your travel experience?*
    - – *Which particular changes have had those effects, e.g. introduction of peak and off peak times/introduction of fares for children/no group tickets available in peak times anymore?*
  - o What did you think about price rises and the Holdall being introduced at the same time? *Moderator to listen out for spontaneous responses then explain that the recent price increase on the Park and Ride was not related to, and did not fund the holdall smartcard® project*
  - o What should NCC say to passengers to explain that price rises are not related to the introduction of the holdall smartcard?

- **sQuid travel purse**
  - (As appropriate) What have you heard about being able to pay for individual or group day tickets with your Holdall card? *Moderator to listen out for spontaneous responses then probe:*
    - What have you heard about sQuid travel purse, if anything? What did you think about that?

As appropriate, if respondents haven't heard of it and don't understand what it is moderator to explain what sQUID is using the following definition:

If you have a Holdall card, you can also register for a sQuid travel purse. It's a separate part of your Holdall card where you can add money to pay for one-off day ticket (including group tickets) on the Norwich Park and Ride buses.

  - What do you think about being able to use the sQuid travel purse with your Holdall card?
  - How appealing is that? Why yes/no?
  - What would you expect the benefits to be?
  - What would you expect its drawbacks to be, if any? How important is that? Why yes/no? How could that be overcome?
  - What stopped you from registering for it so far? How important are those reasons?
  - What could make you interested in using the sQuid travel purse?

As appropriate, if respondent has sQuid travel purse moderator to explore the following questions:

  - *What did you hear about sQuid travel purse before you registered? What did you think about that?*
  - *What prompted you to register for it?*
  - *How did you find the registration process? What worked well/less well about it?*
  - *What did you want to know? How easy was it to find this information? Was anything unclear/missing? If so, what?*
  - *How often do you think you would use this part of your Holdall card to pay for travel on Park and Ride buses?*
  - *What are the typical situations when you would use this? Why those situations?*
  - *What are the benefits of the sQuid travel purse?*
  - *What are its drawbacks, if any?*
  - *What would you improve about it, if anything?*

- **Online account**
  - *What have you noticed about things you can do through your online account when you applied? What did you think about being able to use the account in those ways?*
  - *How do you feel about the idea of using an online account to buy fares/add money to your card? How easy/difficult do you think this will be?*
  - *How do you imagine it will work?*

- o What other things do you think you will use your online account for, if any?
- o What are the benefits/drawbacks of being able to do these things through an online account:
  - – Buying fares
  - – Checking your online transactions
  - – Topping up your sQuid travel purse
- o How interested would you be in checking your transactions? When would you do it? What would prompt you to do that?

*Moderator to introduce **Stimulus B – screen grabs** of online account and ask respondent to refer to this when answering the questions below. If respondent has details available and is comfortable to log in to account then offer option to look at live instead (internet access pending):*

- o *What were you thinking as you looked at your account? How easy/difficult is your online account to use? Is anything unclear? What works well/less well about it?*
- o *How easy does buying the fares through your online account seem to you?*
- o *How easy does checking your transactions online seem? Anything that could be improved about that?*
- o *(As appropriate) How easy is it to top up your sQuid travel purse?*
- o *Is there anything else you would like to be able to do through your online account? How important is that? What would it add/how would that help you?*
- o *What if anything would you improve about the online account? What, if anything, would you improve about the process of buying the fares?*

- **Summary view of Holdall**
  - o Following our discussion, what words would you use to describe Holdall?
  - o *After spontaneous descriptions, Moderator to introduce **Stimulus C – Characteristics card** and let them read it, then explore:*
  - o How does holdall fit with the characteristics on the card? Which feel true for you? And which less so? Why?
  - o How have your views about Holdall changed as a result of taking part in this research, if at all? If they were improved, what should NCC say to passengers to tell them about this?

5. Suggestions for future roll out of smartcard ticketing scheme

EXPLAIN TO RESPONDENTS that the smartcard ticketing system is eventually going to be rolled across the UK. We would like to hear their suggestions for how this can be done as effectively as possible.

- **Learning from the pilot**
  - o Based on your experience so far, what could have been done better when introducing Holdall on the Park and Ride services?
    Moderator to probe: Promotion? Level of information? Application process? Customer support? Usability of the online account?
  - o Based on your experience, what has <u>worked well </u>about the way Holdall was introduced?
  - o What has worked <u>less well</u> about the way Holdall has been introduced?
  - o What is necessary to bear in mind in order for the introduction of smartcards to be successful when they are rolled out in other areas?

o   What is important to avoid?

<table>
<tr><td style="background:#1f6fc4;color:#fff;text-align:center;font-weight:bold">6.   SUMMING UP (5mins)</td></tr>
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Wrap up discussion:

o   On the whole, **if smartcards were to be rolled out in busses across the UK, what impact do you think this would have on travel?**
o   What would be the benefits? Drawbacks?
o   What are the key things that need to be done to make smartcards beneficial to passengers? To introduce smartcards successfully?
o   Anything else which needs to be considered?

Thank respondents.
Close interview.

Appendix

- **Characteristics Card** – one page showing following characteristics:
    o   Value for Money
    o   Convenient
    o   Simple
    o   Secure
    o   Flexible
    o   Tailored *i.e. ability to manage account online/via app*
    o   Leading Edge *i.e. modern/forward thinking way of ticketing*

2028 – Passenger Focus – Norfolk Bus Passenger Pilot Phase 2

DISCUSSION GUIDE – Depth interviews with Users (1.5hrs)

Notes:

- *This Guide indicates the areas to be explored in the discussion, the likely order in which topics will be covered and the kinds of questions and techniques which may be used. There will be some flexibility of discussion, however, to account for each of the individuals being interviewed.*
- *Not all respondents will respond to the same level of language or explanation. While the questions below detail how we intend to cover topics in our own 'language', efforts will be made to meet the communication needs of the individuals interviewed.*
- *Timings on the guide are approximate and give an indication of where the emphasis in the conversation will be.*

The overall aim of this research is to understand

- **To understand passengers' awareness, experiences and views regarding the 'Norfolk Holdall' smartcard**

- To understand bus operators' and NCC staff experiences of, and views about, the implementation of the smart ticketing scheme in Norfolk

To achieve this, we also need:

h) To understand passengers' experience of getting the smartcard
- How have they heard of the smartcard?
- Why did they apply to get the smartcard?
- What were their expectations from the smartcard? (How it will work, benefits, any concerns)
- What were their information needs at the point of applying? To what extent were these needs met?
- What was their experience of the application process? (Ease of applying, ease of understanding fares, speed of card arriving)
- What did they think of the card and accompanying materials once they arrived?
- What would they improve, if anything, about the process of applying?

i) To understand passengers' experience of using the smartcard
- When and where did they first use their card? Why then and there?
- What was that experience like? Was it clear what they needed to do? What were their initial thoughts? How did it make them feel?
- Did they need any assistance or support? If so, what for and how was this sought? How satisfied were they with customer support? Was their problem resolved? Was their overall experience of seeking assistance positive or negative? How could this be improved?
- What is their experience of using the online account like?
- How does paying by smartcard compare to the way they used to pay for their bus journeys

before?

j) To gather passengers' views on how the scheme can be improved and rolled-out to further operators

- What could have been done better when introducing the Holdall on the Park and Ride services?
- What can we learn from this experience about:
    - What has worked well so could/should be repeated when the smartcard is rolled out to other services
    - What has worked less well so needs to be improved when the smartcard is rolled out to other services
    - What are both passengers' and staff views on how the process of introducing the smartcard ticketing scheme elsewhere can be improved?

Stimulus:

- A: Communication materials accompanying the card
- B: Screen grabs of online account (or access online account live if feasible)
- C: Characteristics cards

1. Intro and warm up (c.5 minutes)

- **Moderator**
- *Introduce self, explain the process of market research to respondents (confidentiality and independence) and the format of the discussion*
- *Explain topic of discussion is understanding experiences with regards to using the new smart cards on Park and Ride buses*
- *Purpose is to gather their thoughts, opinions and ideas*
- *Explain need for honesty/that there are no expectations around answers, etc*
- *Permission to audio record*
-

- **Brief 'warm up'**
- Name(s), age, occupation
- Travel behaviour:
    - Frequency of travel on Park and Ride (P&R) buses
    - Which tickets they buy on P&R buses
    - Reasons for travel/where they go when they use P&R buses
    - Why they use P&R buses *(Moderator to listen out for spontaneous responses then probe: cheaper than paying for parking, more convenient)*
    - Whether they travel on other buses in Norfolk too *(Moderator to probe: which ones, how much they use them)*
- Comfort with new technologies/the internet
    - How they feel about using new technologies
    - How comfortable they feel using the Internet *(Moderator to listen out for anything respondents aren't comfortable doing online, e.g. shopping)*
    -

2. Initial Awareness and Expectations of Holdall

- *EXPLAIN TO RESPONDENTS that we would like to know about how they first heard about Holdall and what their expectations were. Respondents to use their pre-task as a prompt and moderator to probe further as required.*

- **Initial awareness of Holdall**
  - Where did you first hear about the Holdall smartcard?
  - *Probe as appropriate: friends and family, information notices / posters at Park and Ride sites / on Park and Ride buses, Norfolk City Council website, local radio / newspapers, saw other passengers using it*
  - (As appropriate) What did you hear? Positive/negative comments? *Moderator to establish where both positive and negative comments, if any, came from. Moderator to also listen out for any comments on P&R fare rises which were introduced independently from Holdall but at the same time, however do not probe at this point.*
  - (As appropriate) What did you think/feel about what you heard about the Holdall card?
  - What prompted you to apply for the smart card? Why did you apply for it? *Moderator to understand all the reasons respondent had for applying for the card*
  - When did you apply? *Moderator to probe: before you could start using on 14th April or afterwards?*
  -

- **Expectations of Holdall**
  - Before applying for the card, how did you expect it to work?
  - What did you think the benefits would be as opposed to your usual method of paying? Anything else?
  - *Moderator to understand all perceived benefits. Do not probe but listen for: saving money, saving time, not having to carry around change, being able to buy tickets for others (e.g. children), liking to use new technologies*
  - What reservations/concerns did you have, if any?
  - *Moderator to understand all perceived drawbacks. Do not probe but listen for: fear of losing the card/it being stolen, uncertainty about method/how to use, uncertainty around fares, distrust of technology, not comfortable online*
  - What did you want to know about the card before you applied? What information did you look for, if any?
  - *Probe: How to use the card? Fares? Where it could be used/limitations around use? Using it in conjunction with discounts, e.g. family tickets/children? Anything else?*
  - Where did you look for information? How easy was it to access the information you wanted? Was there any information you couldn't find?
  - How could it have been made easier to access the information you wanted?
  - What did you think about what you found about Holdall? How easy was it to understand?
  - Could this information have been clearer? If so, how?
-

3. Experience of Application Procedure

- *EXPLAIN TO RESPONDENTS that we would like to know about their experience of applying for and receiving the smartcard. Refer to their pre-task as needed.*

- **Applying for the card**
  - How did you find the application procedure? What worked well/less well about it?

- How easy or difficult did you find the application process? *Moderator to probe: in terms of understanding what to do to apply; how simple or complicated applying was; how much effort was needed*
- Was there anything confusing? Was there anything surprising? If so, what?
- Did you get anyone to help you with applying? *Moderator to listen out for what specifically they needed help with*
- Did you already have an email address before applying for the card?
- Where did you apply? *Moderator to listen for spontaneous responses then probe if necessary: at home, at work, at public library*
- How did you feel about creating an account? *Moderator to listen out if respondents had any reservations about that, e.g. privacy, effort needed*
- Which type of ticket did you buy in order to apply? Why that ticket? How did you feel about having to buy a season ticket in order to get the card?
- Could the application procedure be improved at all? If so, how?

- **Receiving the card**
  - How long did it take for your card to arrive? How did you feel about the speed the card took to arrive?
  - What came with the card when you received it? Did you look at any materials that came with the card?
    – If yes, what did you want to find out about? How easy was it to find that information? How clear was it? Was there anything missing in there? If so, what? What improvements would you make to it, if any?
    – If not, why?
  - Was there anything you were expecting in the pack that was not there? Anything additional to what you expected?

*Moderator to introduce **Stimulus A – Communication materials** and ask respondent to briefly look at them. Moderator then to explore the following questions:*

- (As appropriate, if not covered before) What did you think about this information? How did reading this make you feel?
- How easy was it to understand? Was there anything confusing/surprising?
- How relevant was this information to you? Why yes/no? What were the most important pieces of information here for you? Was anything missing?
- What could be improved about this information, if anything?

- On the whole, how did you feel about the process of applying for and receiving your Holdall smartcard?
- What, if anything, would you change about the process?
  –

4. Experience of Using Holdall

- *EXPLAIN TO RESPONDENTS that we would now like to know more about their experience of using the smartcard*
  –

- **Initial experience of using Holdall**
  - What do you remember about the first time when you used the card?
  - What were you thinking before the first time you used it? How did you feel?
  - What did you expect using Holdall would be like before you used it for the first time?
  - Did you understand how to use it? How did you know?
  - How easy was it to use your Holdall? Did anything surprise you? Did you have any difficulties using it?

- o Did you ask anyone for help? Who did you ask? *Moderator to listen out for spontaneous response then probe: bus drivers, staff at Park and Ride sites, customer support staff via phone/email*
- o (As appropriate) How helpful were bus drivers / staff at Park and Ride sites / customer support staff? What did they do/say? How satisfied were you with their help? Was the problem solved?
- o And what did you think after you first used the card? How did you feel?
  - –

- **Subsequent experiences of using Holdall**
  - o And how have you found using your Holdall since then?
  - o What do you think are its main benefits?
  - – *Moderator to understand all perceived benefits of Holdall*
  - o What do you think are its drawbacks, if any?
  - – *Moderator to understand any perceived drawbacks of Holdall?*
  - o Have you experienced any problems using it since? If so, what happened? How was this resolved? How satisfied were you with how this was resolved?
  - o How does using Holdall compare to the way you used to pay for the bus?
  - o What impact, if any, has Holdall had on your travel experience on Park and Ride buses?
  - o What impact, if any, did Holdall have on how you use Park and Ride bus services?
  - – *Moderator to listen to spontaneous responses then probe: on frequency of travel, times of travel, bus services used.*

- **Fares**
  - o What fares are you aware you can get with your Holdall card? *Moderator to listen out for whether respondents are aware of the range of season fares and also that they can register for sQuid travel purse, add money to it and use it to pay for day and group tickets*
  - o What fares do you typically buy with your card? Why those?
  - o What are their benefits/drawbacks to you? How do they fit with the typical journeys you make?
  - o Do you ever buy any different fares? Why/when?
  - o Is there anything, in terms of the types of fares offered, which could be improved? *Moderator to focus respondent on types of fares rather than actual prices*

  - o What do you remember hearing about fare rises on P&R buses when they were introduced? What did you think about that at the time? How did you feel about it? *Moderator to listen out for whether price rises are linked to the introduction of Holdall but do not probe now*
  - o What difference have the changes to the fares on P&R buses made to you, if any? *Moderator to listen out for spontaneous responses then probe:*
    - – *Have they changed when you travel on P&R buses/how often you travel/your travel experience?*
    - – *Which particular changes have had those effects, e.g. introduction of peak and off peak times/introduction of fares for children/no group tickets available in peak times anymore?*
  - o What did you think about price rises and the Holdall being introduced at the same time? *Moderator to listen out for spontaneous responses then explain that the recent price increase on the Park and Ride was not related to, and did not fund the holdall smartcard® project*
  - o What should NCC say to passengers to explain that price rises are not related to the introduction of the holdall smartcard?

- **sQuid Travel Purse**
  - o (As appropriate) What have you heard about being able to pay for individual or group day tickets with your Holdall card? *Moderator to listen out for spontaneous responses then probe:*
  - o What have you heard about sQuid travel purse, if anything? What did you think about that?

As appropriate, if respondents haven't heard of it and don't understand what it is moderator to explain what sQuid is using the following definition:

If you have a Holdall card, you can also register for a sQuid travel purse. It's a separate part of your Holdall card where you can add money to pay for one-off day ticket (including group tickets) on the Norwich Park and Ride buses.

  - o What do you think about being able to use the sQuid travel purse with your Holdall card?
  - o How appealing is that? Why yes/no?
  - o What would you expect the benefits to be?
  - o What would you expect its drawbacks to be, if any? How important is that? Why yes/no? How could that be overcome?
  - o *(For those who knew about it)* What stopped you from registering for it so far? How important are those reasons?
  - o What could make you interested in using the sQuid travel purse?

As appropriate, if respondent has sQuid travel purse moderator to explore the following questions:

  - *o* What did you hear about sQuid travel purse before you registered? What did you think about that?
  - *o* What prompted you to register for it?
  - *o* How did you find the registration process? What worked well/less well about it?
  - *o* What did you want to know? How easy was it to find this information? Was anything unclear/missing? If so, what?
  - *o* How often have you used this part of your Holdall card to pay for travel on Park and Ride buses?
  - *o* What are the typical situations when you use this? Why those situations?
  - *o* What are the benefits of the sQuid travel purse?
  - *o* What are its drawbacks, if any?
  - *o* What would you improve about it, if anything?

- **Online account**
  - o How often do you use the online account? What do you use it for? *Moderator to listen out for spontaneous responses then probe: checking transactions made, buying tickets, topping up sQuid travel purse*

- o What are the benefits/drawbacks of being able to do these things through an online account:
  - – Buying fares
  - – Topping up your sQuid travel purse
  - – Checking your online transactions
- o How often do you do check your transactions? When do you do it? What prompts you to do that? Has anything changed in how often/when you check your transactions since the initial period of using your Holdall?

*Moderator to introduce **Stimulus B – screen grabs** of online account and ask respondent to refer to this when answering the questions below. If respondent has details available and is comfortable to log in to account then offer option to look at live instead (internet access pending):*

- o How easy/difficult is your online account to use? Is anything unclear? What works well/less well about it?
- o How easy is it to buy the fares through your online account?
- o How easy is it to check your transactions online? Anything that could be improved about that?
- o How easy is it to top up your sQuid travel purse?
- o Is there anything else you would like to be able to do through your online account? How important is that? What would it add/how would that help you?
- o What if anything would you improve about the online account? What, if anything, would you improve about the process of buying the fares?

- • **Summary view of Holdall**
  - o Following our discussion, what words would you use to describe Holdall?
  - o *After spontaneous descriptions, Moderator to introduce **Stimulus C – Characteristics card** and let them read it, then explore:*
  - o How does holdall fit with the characteristics on the card? Which feel true for you? And which less so? Why?

| **4. Suggestions for future roll out of smartcard ticketing scheme** |

- • *EXPLAIN TO RESPONDENTS that the smartcard ticketing system is eventually going to be rolled across the UK. We would like to hear their suggestions for how this can be done as effectively as possible.*

- • **Learning from the pilot**
  - o Based on your experience so far, what could have been done better when introducing Holdall on the Park and Ride services?
  - • *Moderator to probe: Promotion? Level of information? Application process? Customer support? Usability of the online account?*
  - o Based on your experience, what has worked well about the way Holdall was introduced?
  - o What has worked less well about the way Holdall has been introduced?
  - o What is necessary to bear in mind in order for the introduction of smartcards to be successful when they are rolled out in other areas?
  - o What is important to avoid?
  - •

5. SUMMING UP (5mins)

- *Wrap up discussion:*
-
  - o On the whole, **if smartcards were to be rolled out in busses across the UK, what impact do you think this would have on travel?**
  - o What would be the benefits? Drawbacks?
  - o What are the key things that need to be done to make smartcards beneficial to passengers? To introduce smartcards successfully?
  - o Anything else which needs to be considered?

Thank respondents.
Close interview.

Appendix

- **Characteristics Card** – one page showing following characteristics:
  - o Value for Money
  - o Convenient
  - o Simple
  - o Secure
  - o Flexible
  - o Tailored *i.e. ability to manage account online/via app*
  - o Leading Edge *i.e. modern/forward thinking way of ticketing*

Passenger Focus Smart Card Ticketing Discussion Guide – Staff Interviews

(1.15mins)

> *Notes:*
>
> − *This Guide indicates the areas to be explored in the discussion, the likely order in which topics will be covered and the kinds of questions and techniques which may be used. There will be some flexibility of discussion, however, to account for each of the individuals being interviewed.*
> − *Not all respondents will respond to the same level of language or explanation. While the questions below detail how we intend to cover topics in our own 'language', efforts will be made to meet the communication needs of the individuals interviewed.*
> − *Timings on the guide are approximate and give an indication of where the emphasis in the conversation will be.*

Overall objectives:

- To understand passengers' awareness, experiences and views regarding the 'Norfolk Holdall' smartcard

- **To understand bus operators' and NCC staff experiences of, and views about, the implementation of the smart ticketing scheme in Norfolk**

Specific objectives:

k) To understand bus operators' and NCC staff experiences of implementing the Holdall smartcard
- What information and training did they receive prior to the introduction of the smartcard? How satisfied were they with the information and training they were given? What could have worked better there, if anything?
- What has their experience of the introduction of the smartcard been like? How confident did they feel that they knew what to do? Did they need any help? If so, what help was provided?
- What have they observed about the ways in which passengers responded to the introduction of the smartcard?
- What kinds of issues have passengers had with the smartcard? (Before the introduction, immediately after the introduction, and once the scheme bedded in)
- What were the most common questions passengers asked them about the smartcard?

l) To gather passengers' and staff views on how the scheme can be improved and rolled-out to further operators
- What could have been done better when introducing the Holdall on the Park and Ride services?
  - From passengers' point of view
  - From staff point of view
- What can we learn from this experience about:
  - What has worked well so could/should be repeated when the smartcard is rolled out

to other services
  - What has worked less well so needs to be improved when the smartcard is rolled out to other services
  - What are both passengers' and staff views on how the process of introducing the smartcard ticketing scheme elsewhere can be improved?

Intro and warm up

- **Moderator**
  - *Introduce self, explain the process of market research to respondents (confidentiality and independence) and the format of the discussion*
  - *Explain topic of discussion is about views towards payment on public transport*
  - *Purpose is to gather their thoughts, opinions and ideas*
  - *Explain need for honesty/that there are no expectations around answers, etc*
  - *Explanation of use of audio recording (internal only, anonymity of comments retained) and permission to audio record*

- **Brief 'warm up'**
  - Job role
  - How long have they worked in this role

1. Their role in the pilot and overall views

Moderator to explain that we want to hear about their role in the smart ticketing pilot in Norfolk and understand their overall views about it briefly before we explore this in more detail.

- What has your role been in the smart ticketing pilot in Norfolk?
- How has your work for the pilot changed over the course of the pilot? *Moderator to probe: what were the specific things they needed to do to prepare for the pilot, to launch the pilot, immediately after the pilot started, during the pilot*
- What did you think about running the smart ticketing pilot on Norfolk buses when you first heard about that possibility?
- Having had the experience of implementing this smart ticketing pilot now, have your views in this regard changed at all? If yes, in what way?
- Overall, how has the pilot gone so far in your view? What worked well/less well?

2. Initial awareness and views about the pilot

Moderator to explain that we want to discuss how they first heard about the pilot and what they thought about it then.

- How did you first hear about (the possibility of implementing) a smart ticketing pilot in Norfolk?
  - (As appropriate) Who informed you? How did they inform you, e.g. by email, letter, face-to-face meeting? What did they say? What did you think about that?
- What difference did you think smart ticketing would make to Norfolk, if any?
- What did you think would be the positive/negative sides, if any?
- What did you think about starting the pilot on Park and Ride buses?
- What difference did you think the introduction of the smartcard would specifically make to:
  - Park and Ride bus passengers
  - Park and Ride bus operators

– Norfolk City Council
- What did you think the process of introducing the smartcard would involve? *Moderator to probe: in general, from the perspective of what you needed to do*
- How did you imagine the implementation would go? What did you anticipate could work well/less well?
- What did you think would be the challenges in terms of implementing the pilot, if any? *Moderator to understand why they thought that would be challenging*

3. Getting bus operators on board

Moderator to explain that we want to discuss their experience of getting bus operators interested in taking part in the smart ticketing pilot in Norfolk.

- *(As appropriate)* From what you know/what you were involved in, how do you feel the process of getting bus operators interested in taking part in the pilot went?
    – What were/are their initial reactions? What positive/negative comments have you heard, if any? *Moderator to probe: what questions did they have, how did they hope to benefit from the pilot, what concerns did they have*
    – How easy or difficult has it been for you to answer their questions/overcome any concerns they've had? What reassurance was needed for those less interested to get them on board?
    – What support do they expect once they accept to take part in the pilot? *Moderator to probe: in terms of information, training, technical support, other support during the pilot*
    – How would you change the support offered to other operators on expansion given what you know about the P&R introduction?

4. Informing, training and supporting NCC / bus operator staff

Moderator to explain that we want to discuss how NCC and bus operator staff were prepared for the pilot in terms of information, training and support before, during the launch and later on.

- What happened in terms of how NCC / bus operator / Park and Ride staff were prepared for the introduction of the holdall smartcard?

- (As appropriate) FOR THOSE PROVIDING INFORMATION AND TRAINING
    – What **information** did you circulate concerning the pilot to everyone who was involved? *Moderator to probe: how were other NCC staff / bus operators kept informed throughout the process*
    – What worked well/less well in terms of how information was shared? What could have been improved about that?
    – What **training** and for whom did you organise, if any?
    – (If appropriate) What did the training involve? Who delivered it? *Note all components*
    – What feedback have you received about the training, if any?
    – What worked well/less well about the training you provided?
    – What could have been improved about it?

- (As appropriate) FOR THOSE RECEIVING INFORMATION AND TRAINING
    - What **information** about the pilot was shared with you at different stages of the pilot:
        - When the pilot was first announced
        - Before the launch
        - During the launch
        - Later on
    - How clear was this information? Was anything missing? If so, what was missing?
    - Did it raise any questions? If so, which questions?
    - What worked well/less well in terms of how you were informed about the pilot? What could have been better in terms of the information you received?
    - What **training** did you receive, if any?
    - (If appropriate) What did the training involve? Who delivered it? *Note all components*
    - How prepared/informed did you feel following this training?
    - What worked well/less well about it? How satisfied were you with it?
    - What could have worked better there, if anything? If those improvements were made, what difference would this have made?

- (As appropriate) What other **support** was there in place for bus operator companies / bus drivers / NCC customer support staff involved in the pilot prior to the launch / during the launch / later on?
    - In terms of helping them resolve any technical issues
    - In terms of publicizing information about holdall and changes to the fares
    - In terms of helping with passenger queries and feedback

- (As appropriate) FOR THOSE PROVIDING STAFF SUPPORT
    - Did any NCC / bus operator / Park and Ride staff ask for your help once the smartcard was introduced?
    - If so, what did they need help with? Were you able to provide that help?
    - If yes, what help was provided? How was the situation resolved? What feedback did you receive with regard to the support provided, if any?
    - If not, what stopped you from providing help? What would have enabled you to provide more help?

- (As appropriate) FOR THOSE WHO MAY HAVE ASKED FOR SUPPORT
    - Did you need help at any point once the smartcard was introduced? If so, what did you need help with? Did you ask for help?
    - What help was provided? How was the situation resolved? How satisfied were you with the help provided?
    - If not, what stopped you from asking for help?

- Overall, how confident did you feel that you knew what to do in the run up to the pilot?
    - If so, how did you see your role in helping with the introduction of the card? If not, what were you less sure about? (As appropriate) What could have helped with that?

5. Technical preparation, support and issues

Moderator to explain that we want to discuss their views and observations on the technical side of the pilot and how well that worked.

- (As appropriate) What has your experience of the pilot been in terms of the technology and software involved?
  - What worked well/less well about the process of getting the technology and software ready for the launch of the smartcard? *Moderator to probe on: the speed of the process, any issues encountered, how were they resolved*
- (As appropriate) What have you observed about how the technology and software involved worked since the smartcard was launched?
  - What has worked well/less well about it?
  - Have you received questions/requests for help in relation to:
    - The technology and software used on buses
    - Uploading bought tickets into the cards
    - Automated help-points
    - Anything else?
  - If so, who asked for help? What did they need help with?
  - Were you able to provide help? If yes, what help was provided? How was the situation resolved?
  - If not, what stopped you from providing help? What could have enabled you to provide help?
- What could have been done better in terms of the technical side of the pilot, if anything?

6. Customer information and support activities

Moderator to explain that we want to discuss what they are aware of in terms of any customer information and support activities with regard to the pilot.

- What difference did you think the introduction of the smartcard would make to passengers?
- What impact did you think the introduction of the smartcard would have on passengers' needs for:
  - Information
  - Help and support
- What kind of help did you think passengers would need?
- What challenges in terms of informing passengers did you anticipate, if any?
- *(If not covered before)* From what you're aware, what plans were in place in terms of informing passengers about the Holdall smartcard ahead of the launch?
  - What was done to inform/support the passengers prior to the launch/during the launch/later on? *Moderator to probe: to inform them about how they can apply, how to use the card, about fares they can get with holdall, about the changes to the fares*
  - Was there anything missing in terms of publicity around the holdall smartcard, in your view? Could anything have been done differently to inform passengers better?
- (As appropriate) What were you told about your role in informing and supporting passengers prior/during the introduction of the holdall smartcard?
  - How has your role in providing support to passengers differed at different points of the pilot, if at all – prior to the launch of the card, during the launch, later on when passengers became more familiar with the card?
- (As appropriate) What has your experience of supporting passengers been like following the introduction of the Holdall card?

- How easy/difficult has it been to provide support for questions/issues related to the Holdall card?
- Have you encountered any difficulties? If yes, what difficulties? How was that resolved?

7.   Staff observations about passengers' experiences

Moderator to explain that we would also like to know about what they have observed or experienced from passengers in relation to the Holdall smartcard

- Have there been any issues for passengers using the smartcard?
    - What kinds of issues?
    - When did these issues occur? Shortly after the card was introduced? At a later point during the pilot?
    - How have these issues differed at these different stages of the pilot?
- What were the most commonly asked questions by passengers about the smartcard?
- What can you recall in terms of passengers' comments/feelings about the smart card?
    - Any positive reactions?
    - Any negative reactions?
- Overall how have passengers responded to the introduction of the smartcard in your view? What did you see/hear to think that?
- What difference, if any, has the card made to passenger's experience of travelling on Park and Ride bus services, in your view?
- Is there anything that could be/have been done differently to improve passengers' experience? Prior to introduction? Upon introduction? Going forward?
- Specifically how has the issue of the fare increase been confused with the introduction of the smartcard by passengers? How did you explain this? And how was it received?

8.   Views about improving and rolling out the scheme

Moderator to explain we would like to understand any thoughts they have about ways to improve the smartcard scheme and rolling the scheme out to other operators/areas.

- Overall how well do you think the introduction of the smartcard has gone?
    - What worked well in your view? Why?
    - What worked less well? Why?
    - How could this process have been improved?
- How have your opinions of the smartcard changed now that is has got going, if at all?
- What could have been done better when **introducing the Holdall** on the Park and Ride services? *Note all suggestions*
- What could have been done better to **make you better prepared/to prepare NCC / bus operator staff better** for the introduction of the card, if anything? How could those things have been improved?
- What difference would these changes have made to **your experience** of the Holdall Smart Card introduction?
- What difference do you think these changes would have made to **passengers' experience** of the Holdall Smart Card introduction?
- What advice would you give in terms of rolling out the smartcard ticketing scheme to other services/areas? Expanding in Norfolk to other buses? Starting afresh in another county? *Moderator to listen out for any locally-specific aspects of the process of introducing smart ticketing as opposed to more widely relevant and applicable*
- What could these people learn from your experience about:
    - Things that worked well
    - Things that worked less well

9. SUMMING UP

Wrap up discussion:

- What are your final thoughts on the introduction of the Holdall smartcard?
- What advice would you give to people living in an area where smartcards are to be introduced?
- Do you have any further comments?

Thank respondents and close.

APPENDIX 2 – Online questionnaire

QUESTIONNAIRE – Passenger Focus: Norfolk Bus Passengers Research Phase 2

INTRO

Hello and welcome to this survey about your holdall smartcard®. We would like to hear about your experience of using your holdall smartcard® and your views about it.

The survey should take between 5 and 7 minutes. Everyone who completes the survey will be offered a chance at the end of the survey to be entered in to our prize draw to win one of three £50 cash prizes.

All the information you share is completely confidential and will be used only anonymously in the form of statistics. Your personal data won't be shared with anyone and your answers will be used to help Norfolk County Council and bus companies which operate Park and Ride buses ensure they are offering the best service possible for bus passengers.

Please click next to take part in this survey.

SECTION 1: GETTING THE holdall smartcard®

ASK ALL
Q1. **Where did you hear about the** holdall smartcard® **before you applied for it?**

MULTICODE. ROTATE 1 - 8

1. Friends and family
2. Park and Ride staff
3. Posters / Information notices at Park and Ride site(s)
4. Posters / Information notices on Park and Ride buses
5. Norfolk County Council website
6. Local newspapers
7. Local newspaper sites
8. Local Radio
9. Other (please type in your answer)

    ....

10. Don't know

ASK ALL
Q2. Why did you apply for a holdall®?

ROTATE 1 - 7. MULTICODE.

1. So I don't have to carry cash around for bus fares
2. To buy the season tickets you can get with a holdall®
3. So I can board the bus more quickly
4. To get cheaper fares and save money
5. To save time
6. To be able to pay for travel for someone else, e.g. children
7. To help with budgeting
8. Other (please type in your answer)

   ....

9. Don't know

ASK ALL
Q3. On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult was it to:

SINGLE CODE.

	Very easy				Very difficult
Understand how to apply for a holdall®	1	2	3	4	5
Apply for your holdall®	1	2	3	4	5
Understand which tickets you can buy with a holdall®	1	2	3	4	5
Understand at what times you need peak or off-peak tickets	1	2	3	4	5

ASK ALL
Q4. About when did you receive your holdall smartcard®**?**

SINGLE CODE.

1. About a week ago
2. About two weeks ago
3. About three weeks ago
4. About a month ago
5. About a month and a half ago
6. About two months ago
7. About three or more months ago
8. Other (please type in your answer)

   ....

9. I can't remember

ASK ALL
Q5. About how long did it take for the card to arrive from when you applied?

SINGLE CODE.

1. 1-3 days
2. 4-7 days
3. 8-10 days
4. 11-14 days
5. More than 14 days (please specify) ....
6. I can't remember

ASK ALL
Q6. On a scale of 1 to 5, where 1 is very quickly and 5 is very slowly, how would you rate the <u>speed</u> of your holdall smartcard® arriving after you applied for it?

SINGLE CODE.

1 – Very quickly
2
3
4
5 – Very slowly

SECTION 2: USING THE HOLDALL CARD

ASK ALL
Q7. We'd now like to ask you a few questions about your experience of using your holdall® **How often have you used your holdall® in the last 4 weeks?**
SINGLE CODE.

1. Almost daily
2. A few times a week but not every day
3. About once a week
4. A few times in the last month, but not every week
5. Only once in the last month
6. I haven't used it in the last month.
7. Don't know
8. Other (please type in your answer)

   ....
9. Don't know

ASK ALL
Q8. Which of the following Park and Ride bus services do you ever use your holdall® **on?**

MULTICODE.

1. Airport service (bus 603)
2. Costessey service (bus 604)
3. Harford service (bus 602)
4. Postwick services (buses 605 and 606)
5. Sprowston services (buses 606 and 605)
6. Thickthorn service (bus 601)
7. Konectbus 10 service
8. Don't know

ASK ALL
Q9. How long have you been using Park and Ride bus services?

SINGLE CODE.

1. I have just started using it
2. For a month or two
3. For several months
4. For about a year
5. For 2-5 years
6. For 6-10 years
7. More than ten years
8. Don't know

ASK ALL
Q10. Which of the following do you have on your holdall® **at the moment?**

MULTICODE.

1. Money in my sQuid Travel Purse
2. Peak 10 day saver ticket
3. Off-peak 10 day saver ticket
4. Peak weekly season ticket
5. Off-peak weekly season ticket
6. Peak 4 weekly season ticket
7. Off-peak 4 weekly season ticket
8. Peak 12 weeks season ticket
9. Off-peak 12 weeks season ticket
10. Peak annual season ticket
11. Off-peak annual season ticket

12. None of these
13. Don't know

ASK ALL
Q11. About how often do you log in to your holdall® **online account?**

SINGLE CODE.

1. Daily
2. Weekly
3. Fortnightly
4. Monthly
5. Every couple of months
6. Less than every couple of months
7. Don't know

ASK ALL
Q12. On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult do you find:

SINGLE CODE.

	Very easy				Very difficult
Using your holdall smartcard® on buses	1	2	3	4	5
Using your online holdall® account to find out information	1	2	3	4	5
Buying tickets online for your holdall®	1	2	3	4	5
Collecting the tickets you bought onto your holdall smartcard®	1	2	3	4	5

FOR THOSE WHO HAVE SQUID TRAVEL PURSE ON THEIR HOLDALL SMARTCARD® IF CODE 1 AT Q10
Q13. On a scale of 1 to 5, where 1 is very easy and 5 is very difficult, how easy or difficult do you find topping up your sQuid travel purse online?

SINGLE CODE.

1 – Very easy
2
3

4

5 – Very difficult

ASK ALL
Q14. Have you done any of the following?

MULTICODE. ROTATE ANSWERS 1 - 5

1. Asked staff at Park and Ride sites for help with using your holdall®
2. Asked bus drivers on Park and Ride buses for help with using your holdall®
3. Called customer support phone line to ask for help with using your holdall®
4. E-mailed customer support to ask for help with using your holdall®
5. Used an automated help-point at a Park and Ride site
6. No, I haven't asked for help with using my holdall® **[EXCLUSIVE]**
7. Don't know **[EXCLUSIVE]**

FOR THOSE WHO HAVE ASKED BUS DRIVERS OR STAFF AT PARK AND RIDE SITES FOR HELP IF CODE 1 OR 2 AT Q14

Q14a. On a scale of 1 to 5, where 1 is very satisfied and 5 is very dissatisfied, how satisfied or dissatisfied were you with customer support you received from staff?

SINGLE CODE.

1 – Very satisfied

2

3

4

5 – Very dissatisfied

FOR THOSE WHO HAVE ASKED FOR HELP OVER THE PHONE OR EMAIL IF CODE 3 OR 4 AT Q14

Q14b. On a scale of 1 to 5, where 1 is very satisfied and 5 is very dissatisfied, how satisfied or dissatisfied were you with customer support you received by phone or email ?

SINGLE CODE.

1 – Very satisfied

2

3

4

5 – Very dissatisfied

FOR THOSE WHO HAVE USED AN AUTOMATED HELP-POINT AT A PARK AND RIDE SITE IF CODE 5 AT Q14

Q14c. On a scale of 1 to 5, where 1 is very satisfied and 5 is very dissatisfied, how satisfied or dissatisfied were you with customer support you received by using an automated help-point at a Park and Ride site?

SINGLE CODE.

        1 – Very satisfied
        2
        3
        4
        5 – Very dissatisfied

SECTION 3: CUSTOMER VIEWS ABOUT HOLDALL

ASK ALL
Q15. Now we'd like to ask you a few questions to understand how you feel about the introduction of the holdall smartcard® on Park and Ride services more broadly, and what impact, if any, that had on your travel experience. *Please note that the recent price increase on the Park and Ride was not related to, and did not fund the holdall smartcard® project*

On a scale from 1 to 5, where 1 is strongly agree and 5 is strongly disagree, to what extent do you agree or disagree with the following statement?

SINGLE CODE.

	Strongly agree				Strongly disagree
Using the holdall® has improved my travel experience on Park and Ride buses	1	2	3	4	5

ASK ALL
Q16. On a scale from 1 to 5, where 1 is strongly agree and 5 is strongly disagree, to what extent do you agree or disagree with the following statements?

SINGLE CODE. ROTATE STATEMENTS

	Strongly agree				Strongly disagree
The introduction of the holdall® shows that Norfolk is modern and innovative in their approach to transport	1	2	3	4	5
The introduction of the holdall® shows that Norfolk is providing affordable public travel	1	2	3	4	5

| Norfolk has improved travel experience on Park and Ride buses by introducing the holdall® | 1 | 2 | 3 | 4 | 5 |

Q17. On a scale from 1 to 5, where 1 is strongly agree and 5 is strongly disagree, to what extent do you agree or disagree with the following statements?

SINGLE CODE. ROTATE STATEMENTS

	Strongly agree				Strongly disagree
I am satisfied with the range of tickets I can buy with my holdall smartcard®	1	2	3	4	5
I can find a ticket that suits my travel on Park and Ride buses	1	2	3	4	5
Tickets you can buy with the holdall® are affordable	1	2	3	4	5

Q18. What else, if anything, would you like to be able to use your holdall smartcard® **for?**

MULTICODE. ROTATE 1 - 5.

1. To pay in public libraries
2. To pay in sport centres
3. To pay in grocery shops
4. To pay for parking
5. To pay for travel on trains
6. To use on other buses in Norfolk
7. To use on buses outside Norfolk
8. Other (please type in your answer)

    ....
9. Nothing else **[EXCLUSIVE]**

Q19. If you have any further comments about the holdall smartcard® **we would really appreciate it if you shared them with us in the space below:**

DEMOGRAPHICS

Q20. Do you use any other bus services in Norfolk apart from the Park and Ride bus services?

1. Yes
2. No

FOR THOSE WHO USE OTHER BUS SERVICES IN NORFOLK IF CODE 1 AT Q20

Q20a. Which bus operators run the bus services you use?

MULTICODE. ROTATE 1-10.

1. Anglian Bus
2. Coach services
3. First
4. Konectbus
5. Norfolk Green
6. National Express
7. Sanders Coaches LTD
8. Simmonds Country Link
9. Coasthopper
10. Other (please type in your answer)

   ....
11. Don't know **[EXCLUSIVE]**

ASK ALL
Q21. How old are you?

SINGLE CODE.

1. Under 18
2. 18-25
3. 26-30
4. 31-35
5. 36-40
6. 41-45
7. 46-50
8. 51-55
9. 56-60

10. 61-65
11. Over 65
12. Prefer not to say

ASK ALL
Q22. Are you...?

SINGLE CODE.

1. Female
2. Male
3. Prefer not to say

ASK ALL
Q23. Which of the following applies to you?
If you have more than one occupation, please choose your main occupation.

SINGLE CODE.

1. I work full time (35 hours per week+)
2. I work part-time (up to 34 hours per week)
3. I am unemployed
4. I am a student
5. I am a homemaker
6. I am retired
7. I am a carer
8. Other (please type in your answer)
   ....

ASK ALL
Q24. Do you have a registered disability?

SINGLE CODE.

1. Yes
2. No

FOR THOSE WHO HAVE A REGISTERED DISABILITY IF CODE 1 AT Q24

Q24a. What type of disability do you have?

MULTICODE.

1. Visual impairment
2. Hearing impairment
3. Mobility impairment
4. Learning difficulties
5. Disability due to a chronic condition

6. Other (please type in your answer)

....

ASK ALL

Q25. Would you be happy for us to contact you for a further interview so we can find out more about your views about holdall®**? Note: You would be reimbursed for your time.**

SINGLE CODE.

1. Yes
2. No

Thank you for your answers. Your opinions are really valuable to us.

Please enter your email address here if you wish to be entered in to our prize draw to win one of three £50 cash prizes. Your email address will only be used so you can take part in our prize draw and won't be used for any other purpose.

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