

Foreword

Passengers are increasingly coming to expect services to be delivered to them in smarter ways as technology becomes a bigger part of everyday life.

We believe that the introduction of smarter ticketing in public transport could make life easier – and cheaper – for passengers. For this to happen though, it is essential that any smarter ticketing schemes are well-designed, properly implemented and clearly communicated.

In order to make sure that the passenger is at the heart of the development – that products are designed for ease of use rather than what is convenient to administer – we are undertaking a wide-ranging research programme on smart ticketing, on behalf of the Department for Transport (DfT).

Over the next 18 months we will further explore needs and attitudes before smart ticketing is introduced more widely, and evaluate existing and pilot smart ticketing schemes. The reports we produce will provide guidance for transport operators setting up smartcard schemes.

This report, the second in the programme, considers the Oxford SmartZone. This initiative across bus operators in the city, introduced in 2011, includes a smartcard system alongside improved routing and timetabling. SmartZone is generally acknowledged as being a successful smartcard scheme, so we have carried out a case study in order to understand the reasons for this.

Our study of bus users in Oxford found that overall satisfaction with bus services was high both among smartcard users and those using paper tickets; almost nine out of 10 were satisfied.

However, smartcard users give better ratings for value for money on buses than those using paper tickets, which may partly be due to the fact smartcard users claim to be making more journeys by bus since getting one. They also report high levels of satisfaction with using the smartcard.

Overall, it seems that operators in Oxford have done a good job with SmartZone and with smart ticketing more specifically. Awareness of the scheme is high, improvements to bus services have been seen by all passengers, and the multi-operator ticketing arrangements were welcomed. The mechanics of smartcard purchase, top-up and usage are all working well and there is high satisfaction.

For non-users of smartcards, the main reason for not having one was that they did not feel that they would use it enough, implying that current smart products are not seen as being suitable for less-frequent bus users.

There is an opportunity for Oxford operators to review their products and communicate to passengers that smartcards are not just for commuters or other frequent travellers.

Indeed, this work reinforces our view that the range of products made available on smartcards is absolutely essential to encourage uptake. Passengers will not simply switch from a paper ticket to a plastic version, if the ticket type and cost is the same. We know that one of the key reasons that passengers get a smartcard is that they are able to choose from more flexible types of tickets, which will be better suited to their own travel patterns, so saving money and time.

All operators must bear this in mind when introducing or improving smartcard schemes, as well as ensuring that the smartcard purchase, product loading and ease of use are all working well.

Smart ticketing – Oxford SmartZone

Research report

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1. Background

Passenger Focus was asked by the Department for Transport (DfT) to conduct research to explore passenger views and needs concerning the increasing trend for smart tickets and other ticketing solutions across the transport industry. This is the second piece of research in this programme.

Passenger Focus wanted to investigate the experiences and attitudes of bus passengers in an area where a smartcard system is currently in place. In Oxford a new initiative incorporating smart ticketing was implemented across the local bus network in summer 2011 – the Oxford SmartZone. Passenger Focus carried out research in this area to understand passenger needs and concerns relating to smartcards, as well as any benefits and barriers which may influence passenger engagement with the scheme. This research will act as a case study to help inform the introduction of smart ticketing elsewhere.

The Oxford SmartZone includes an integrated cross-operator arrangement whereby a range of traditional and flexible ticketing products can be purchased via smartcards. Smartcards are issued by several bus operating companies in the area, the largest being Go Ahead's 'The Key' which has over 70,000 users. Products added to any card can be used on buses provided by any bus operator working within the scheme (Oxford Bus Company, Stagecoach and Thames Travel), regardless of which operator the smartcard was bought from. Data from the spring 2012 *Bus Passenger Survey* indicates that both awareness and uptake of the scheme are high.

2. Research objectives

The main objective of this research was to provide a case study for smartcard ticketing, identifying features of its success, as well as pinpointing potential areas for improvements and enhancements. The findings will inform best-practice guidelines on the implementation of further such schemes in the future, particularly taking into account the associated impact, needs and concerns from the passenger viewpoint.

More specifically, the research explored several aspects of the Oxford SmartZone scheme including:

- awareness of the introduction of SmartZone and the changes that have been made to buses in Oxford
- awareness and use of smart ticketing products
- the profile of users and non-users of smart ticketing products
- changes in travelling behaviour brought about by SmartZone
- satisfaction with different aspects of bus services in Oxford including the after-sales service
- attitudes to SmartZone and smart ticketing, specifically looking at the benefits of and concerns about the service
- barriers to using smart ticketing products.

3. Summary of main findings

- Buses in Oxford provide a good service and SmartZone had a positive impact. Overall satisfaction with bus services in Oxford was 89 per cent for smartcard owners and 88 per cent for other ticket users.
- Passengers were also positive about being able to use the ticket with different operators (76 per cent agreed), saving money (75 per cent) and having a better choice of tickets (58 per cent).
- Smartcards have brought considerable benefits to bus users in Oxford. In particular 28 per cent claim to be using buses more since getting a smartcard which may have contributed to why smartcard users rated value for money of bus services in Oxford higher than non-card users.
- The functionality of the card was also appreciated with many users giving high satisfaction scores for:
 - its ease of use
 - the ease of applying for one
 - the ease of renewing products or topping up the card.
- The areas where improvements could be made were:
 - the period of time/number of journeys different ticket options cover
 - the additional zones that can be included on the smartcard
 - improving the efficiency of card problem-solving (although few passengers experienced ongoing problems with their card).
- Among users of smartcards there was a high level of satisfaction with the card. Over seven in 10 users (71 per cent) gave it the top rating of 'very satisfied' and a further 27 per cent were 'quite satisfied'.
- Of the additional trips resulting from higher bus usage, most were for leisure purposes. Increased bus usage was especially high for those who had additional zones included on their smartcard (that is zones outside the central Oxford city area). Over four in 10 of these people (45 per cent) claimed to use bus services in Oxford more as a result of having a smartcard.
- Lack of awareness, distrust in technology or previous difficulties with smart technology did not appear to be the barrier for why passengers do not have a smartcard. Instead the frequency of using the bus services in Oxford was the main reason.
- In particular those who used the bus less than twice a week were unlikely to use or want to get a smartcard as it currently exists, implying that current

smart products are not seen as being suitable for less-frequent bus users. Potential enhancements could include:

- to increase the smartcard customer numbers in Oxford a smartcard ticket product aimed at light users might encourage new uptake. The number of trips this covered, the period of time they were valid for, and the benefits of the ticket over traditional paper tickets would need to be considered in any communications to reach these more infrequent bus users.
- bus passengers who also used a bike were less likely to have a smartcard. This suggests that a card which enabled more spontaneous or last-minute decisions to use the bus might appeal to cyclists - for instance, when there is bad weather.
- passengers were less positive about the different zones currently available on their Oxford smartcard. Revising or including additional areas might be a way to further increase uptake and/or use of the smartcard.

4. Approach

In total 1052 interviews were carried out. The majority of interviews, 1012, took place with bus passengers in the street, by BDRC Continental interviewers. For those too busy to do a street interview, the interview was carried out at a more suitable time by phone from BDRC Continental's telephone centre. In total 40 interviews were carried out by telephone.

Interviewing took place in and around Oxford city centre. The central city area was divided into four zones (see Appendix A) and interviewers were assigned to a specific zone for an individual shift. This ensured that a good cross section of bus routes and passengers were covered. Quotas by gender and smartcard usage, as defined by Passenger Focus's *Bus Passenger Survey* (BPS), were used to further ensure that a good spread of men and women, and different ticket users, were included in the sample.

The questionnaire was piloted in early February 2013 and the main fieldwork was carried out in February and early March 2013.

5. Main findings

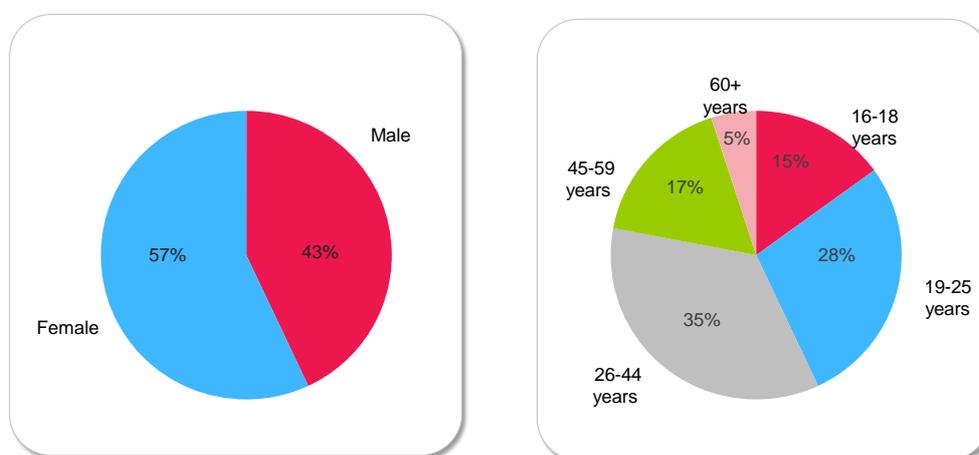
5.1 Profile of fare-paying users of bus services in Oxford

All interviewees had to meet the following sample selection criteria to be eligible for inclusion in the survey:

- travel at least once a month on buses in the Oxford region
- pay for at least some of their fares (i.e. those who only used a concessionary ticket or free bus pass were excluded from the survey).

As found with the BPS survey, bus passengers in Oxford had a slight female bias (57 per cent). Their age profile was also young - 43 per cent aged 16 to 25 – however, the survey excluded those who only used a concessionary ticket to travel free on the buses, and as result few were aged 60 or over.

Table 1: gender and age of bus passengers in Oxford



Base: All 1,052

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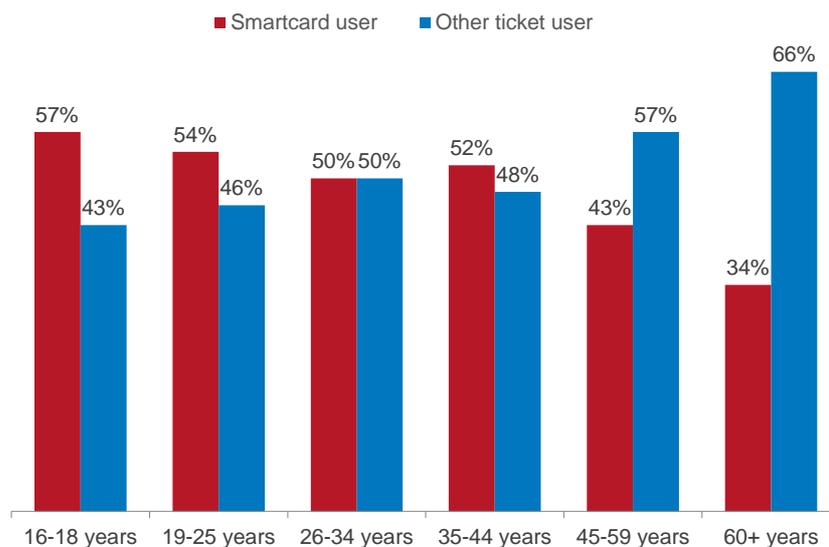
Over a quarter of bus passengers (27 per cent) were students. The remainder worked full time (48 per cent) or part time (10 per cent). One in 10 (11 per cent) were not working and, as few were aged over 60, only two per cent were retired.

5.2 Smartcard ownership

A quota was applied to the sample to ensure 50 per cent of those interviewed usually used a smartcard to travel on buses in Oxford – this matched the BPS fare-paying ticket-user profile for the Oxford region.

Smartcard users were slightly younger than non-users. As Table 2 (overleaf) shows, 57 per cent of 16 to 18 year olds used a smartcard and 43 per cent did not. At the older end of the age spectrum, only 34 per cent of those aged 60 or over usually used a smartcard, although it is important to note that this is not representative of all over-60 bus users since the sample included only those who pay for bus travel (concessionary ticket holders were excluded).

Table 2: smartcard ownership by age

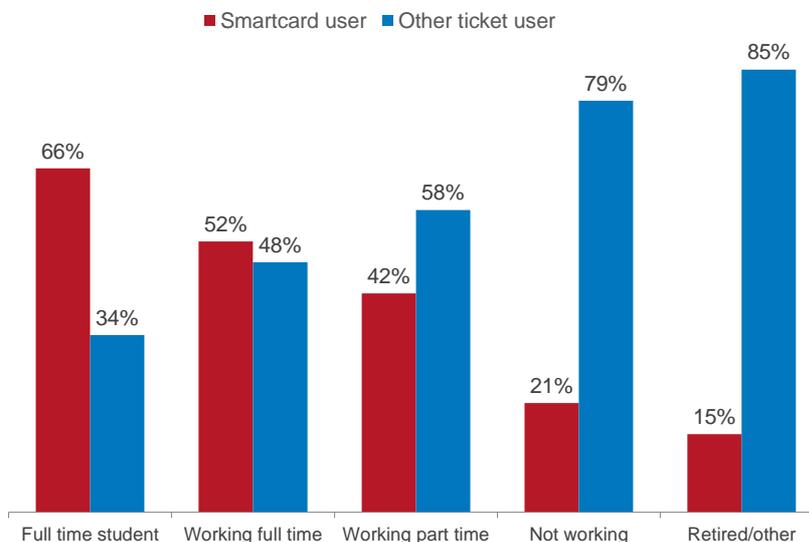


Base: Smartcard users and & non users 526/526



Table 3 shows that smartcard usage was very high amongst students who used bus services in Oxford (66 per cent). For those not working or retired ownership drops considerably with most using a traditional paper-type ticket usually bought on the day of travel.

Table 3: smartcard ownership by working status



Base: Smartcard users and & non users 526/526



Over three quarters (78 per cent) of Oxford smartcard holders had the Oxford Bus Company's 'The Key' card. Other cards in use were:

- Stagecoachsmart: 11 per cent
- Brookesbus The Key/BROOKESkey: 10 per cent
- Other: three per cent.

Two thirds (67 per cent) knew they could use their card with different operators, 26 per cent thought they could only use it with one operator and seven per cent were unsure. Most (83 per cent) had a smartcard that covered the central zone of Oxford only. For the 16 per cent which had other zones included, South Oxfordshire and Park and Ride were the most popular additions.

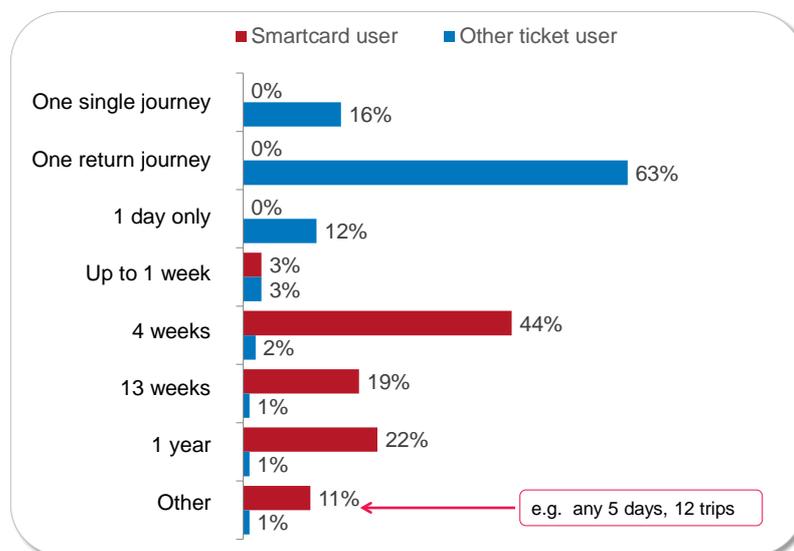
5.2.1 Period of time covered by ticket

Tickets that can be loaded onto The Key, BROOKESkey and Stagecoachsmart are:

- one-week pass
- four-week pass
- 13-week pass
- semester pass (BROOKESkey only)
- one-year pass
- multi-trip tickets, available in batches of 12
- five-day Carnet (The Key and Stagecoachsmart only).

Therefore most non-smartcard users bought either a single, return or day ticket. For smartcard users, their ticket covered a longer period of time with four weeks the most popular.

Table 4: period of time bus ticket covers

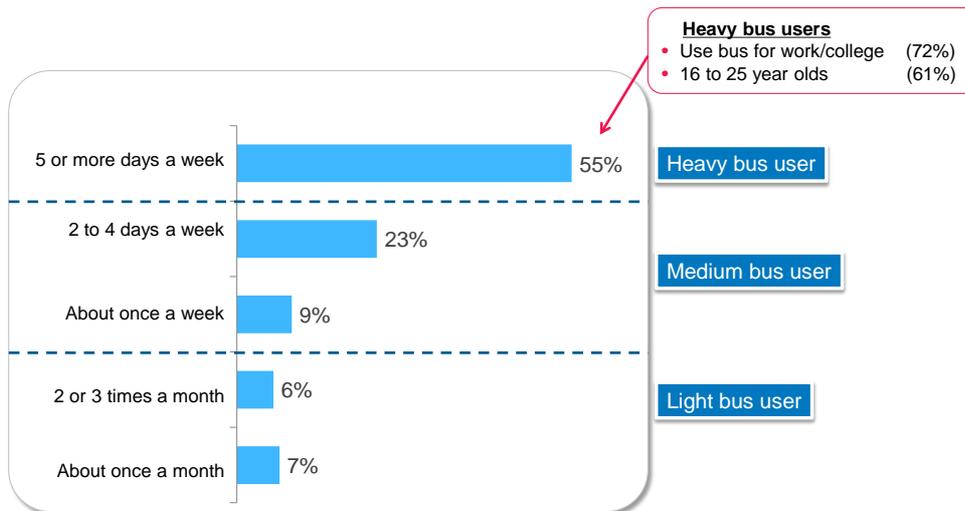


Base: Smartcard users and & non users 526/526

5.3 Bus usage

Just over half of the total sample (55 per cent) used buses in the Oxford area frequently (five or more days a week). These were mainly people using the bus to travel to and from work or college.

Table 5: frequency of using buses in Oxford

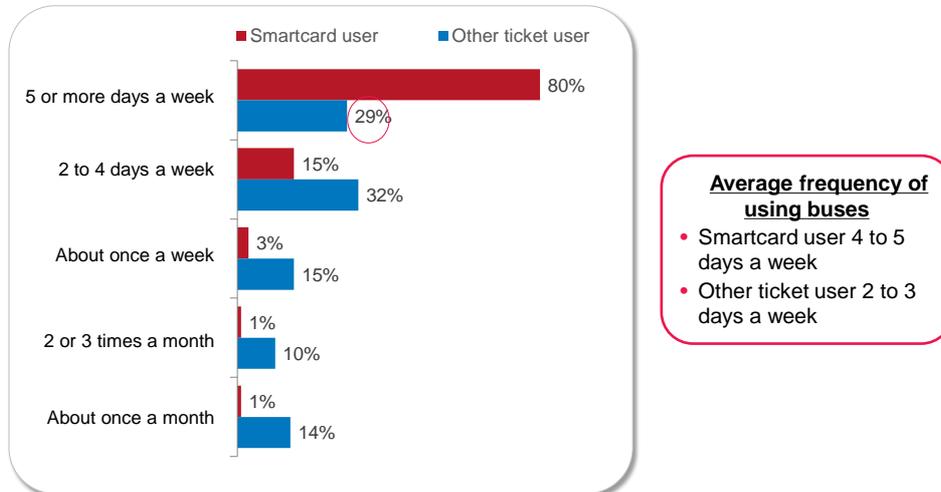


Base: All 1,052



Smartcard holders were much more frequent bus users than those who use other ticket types (see Table 6). Part of the reason for this was that many of the products available on smart are those intended for frequent travel (such as period and multi-trip passes).

Table 6: frequency of using buses in Oxford by ticket type



Base: Smartcard users and & non users 526/526



However, three in 10 (29 per cent) of non-smartcard-holders were 'heavy' bus users. We examined the profile of this group in more detail and found that:

- they were more likely to disagree (29 per cent) that buses in Oxford provided value for money. This compared to 19 per cent of smartcard holders
- nearly a quarter (23 per cent) had previously owned a smartcard
- reasons that these heavy bus users did not want a smartcard included:
 - they were happy to buy paper tickets as required

- they found topping up a smartcard a hassle
- they believed smartcards did not provide value for money.

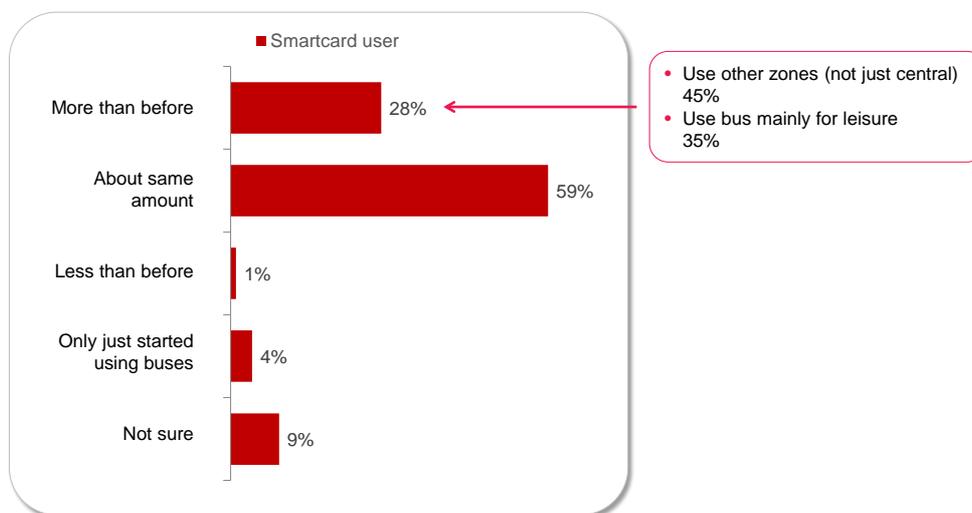
Apathy, as well as some perceptions of value for money, appeared to contribute to the reasoning for not currently owning a smartcard.

Of this group of non-smartcard-holders who are heavy bus users, around one in six used season products (valid for one week or more). Among these, the majority used Stagecoach as their most regular bus operator. This is significant (despite the small base of 25) because some of Stagecoach’s season products are only available as a paper ticket, suggesting that passengers choose the product that suits their needs best and receive their ticket in whatever format is available.

5.3.1 Increased use of buses

A significant number of smartcard holders (28 per cent) claimed to use the bus more than they did before they had a smartcard. The types of journey that have contributed to this increase were mainly leisure trips such as shopping and going out in the evenings. For those who had a smartcard that covered additional zones besides the central city the proportion reporting increased additional trips was even higher (45 per cent).

Table 7: has smartcard ownership increased bus usage



Base: Smartcard users 526

5.3.2 Other transport used

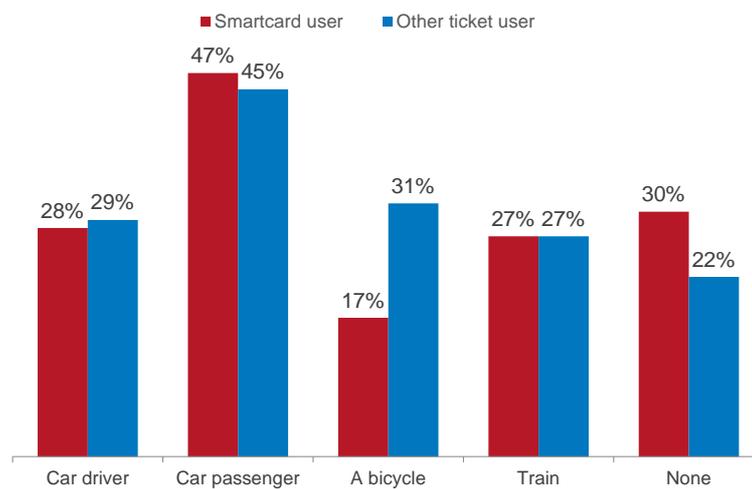
For both smartcard holders and non-holders the other types of transport used once a month or more in the Oxford area were quite consistent, except for bikes (see Table 8 overleaf).

Non-card holders were nearly twice as likely to use a bike suggesting that in Oxford, this method of transport could be a contributing factor for not having a smartcard. For example, some passengers may decide on the day whether to

cycle or use the bus, but they do not believe the current smart offering has products to support this.

Bus passengers who were also car drivers were more likely to be older: 46 per cent were aged 45 to 59. Only 13 per cent of car drivers were aged 16 to 25.

Table 8: other transport used at least once a month, in the Oxford area, by bus users



Base: Smartcard users and & non users 526/526



5.4 SmartZone

At the start of the interview, bus passengers' awareness and knowledge of changes to the bus service (known as Oxford SmartZone) were explored. When asked: "Are you aware of the Oxford SmartZone on the bus network in Oxford?" 60 per cent of all bus users said yes. This rose to 68 per cent when those not aware were prompted with the following brief description:

"The Oxford SmartZone means you can make your outward journey using one bus company and your return journey using a different bus company using the same ticket loaded on a smartcard."

For those aware of Oxford SmartZone, 43 per cent thought it had had a positive effect on bus services. Very few (three per cent) thought it had made the service worse. A quarter (22 per cent) were unsure and a further third (32 per cent) thought it had made no difference, indicating that the changes made were small.

As a result nearly a half (47 per cent) of all bus passengers could not mention spontaneously any changes to the bus service in the last one to two years. Table 9 (overleaf) shows the changes mentioned by passengers over this time.

Table 9: changes to the service mentioned (unprompted)

Sample base size 1052.

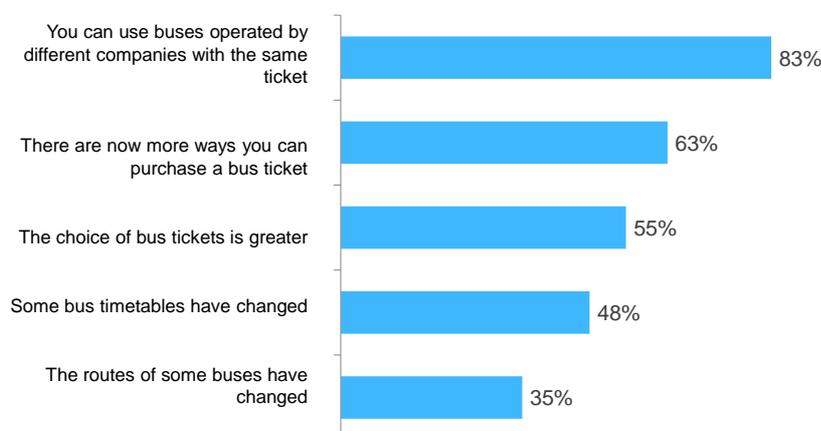
Fares have increased	14%
Buses are more frequent	13%
Use more than one operator	10%
More buses	5%
Greener/Eco-friendly	3%
Unreliable service	3%
Less frequent service	2%
New buses	2%
Some bus numbers have changed	2%
Other reasons	16%
Don't know - nothing	47%

Some unprompted passenger responses included:

- *“Smartcard has been introduced and eco-friendly buses.”*
- *“There has been a price increase and new buses.”*
- *“Prices have gone up. New stops, new routes.”*
- *“Multiple companies on one ticket.”*
- *“Introduction of electric buses. A bit more expensive nowadays.”*

However, when prompted, awareness of some of the changes introduced by the Oxford SmartZone initiative was high. In particular, being able to use different bus operator services with the same ticket was especially noticed.

Table 10: awareness of bus service initiatives in the Oxford area (prompted)

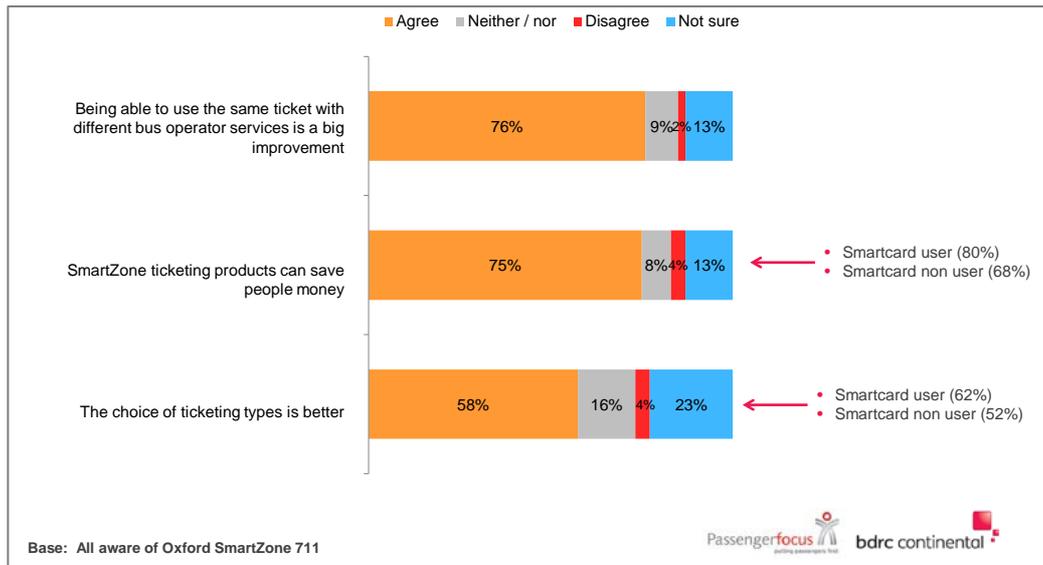


Base: All aware of Oxford SmartZone 711

5.4.1 Views on changes to the bus service in Oxford

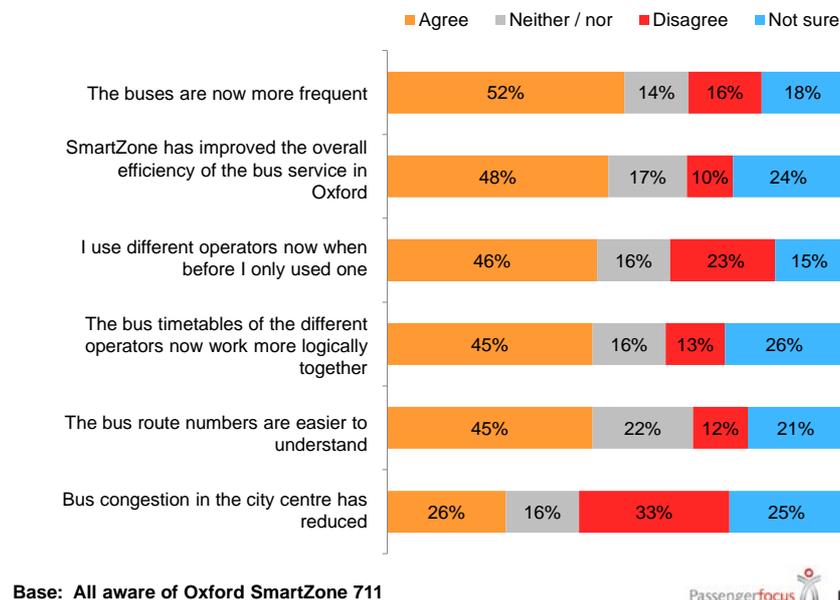
For all those aware of Oxford SmartZone, three quarters agreed that being able to use different operators' services with the same ticket was a big improvement (see Table 11 below). A similar proportion also agreed that SmartZone ticketing products can save people money. There was a little more uncertainty as to whether the choice of ticketing types was better; suggesting either more products need to be available on smartcards or communication of those available should be improved.

Table 11: attitudes to changes to the bus service in Oxford (1 – ticketing)



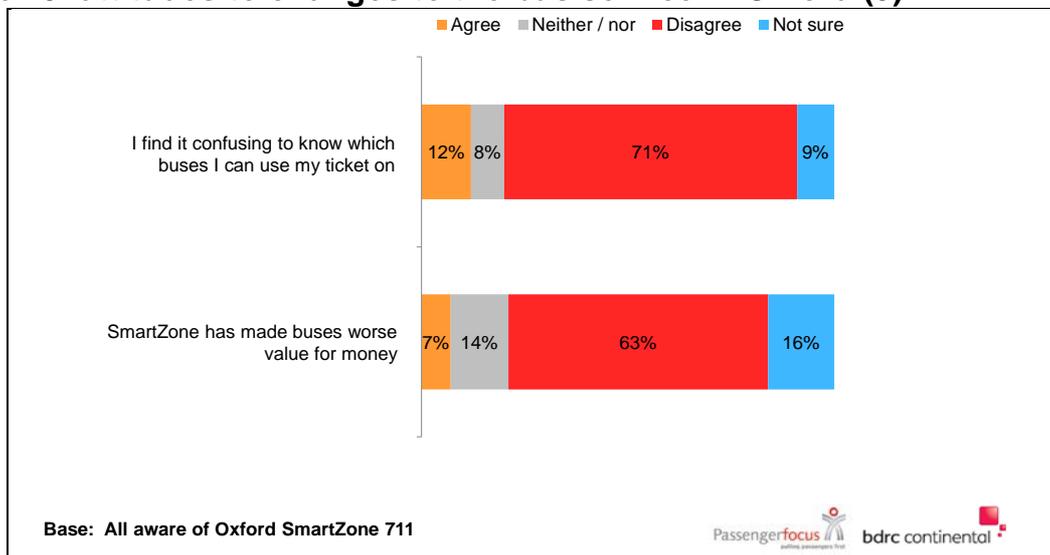
For the other attributes measured (as shown in Table 12) there was mild rather than strong agreement to each. These views were quite consistent for smartcard users and non-users. Bus congestion in the city does still appear to be a problem, which the SmartZone initiative has not addressed as successfully, according to passenger perceptions.

Table 12: attitudes to changes to the bus service in Oxford (2 – service)



Overall, passengers were positive to the changes brought about by SmartZone. As Table 13 shows, few (seven per cent) agreed that SmartZone had made buses worse value for money. Also there was little confusion as to what buses passengers could use their ticket on.

Table 13: attitudes to changes to the bus service in Oxford (3)

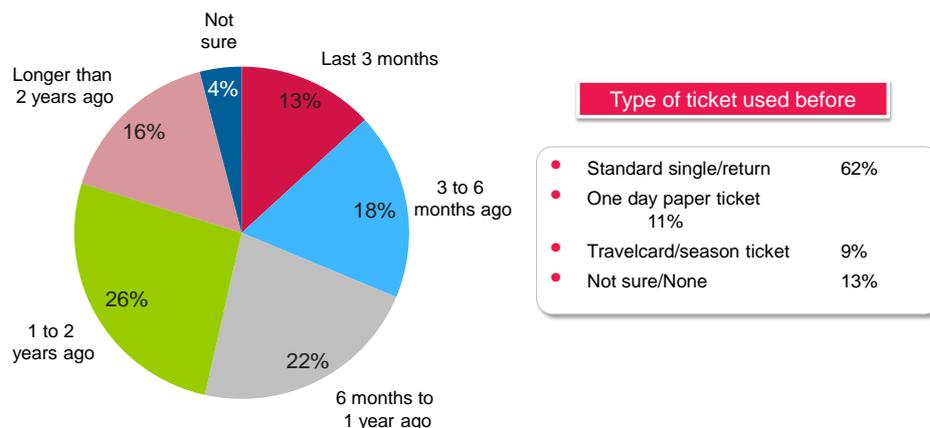


5.5 Smartcard usage and satisfaction

To understand more about the impact smartcards have had on bus passengers in Oxford, we explored their usage and satisfaction with smart ticketing.

A considerable number (31 per cent) had only acquired their smartcard in the last six months. Previously most smartcard users who used buses bought a standard single/return ticket (62 per cent) or day paper ticket (11 per cent).

Table 14: when smartcard was first obtained/type of ticket held before



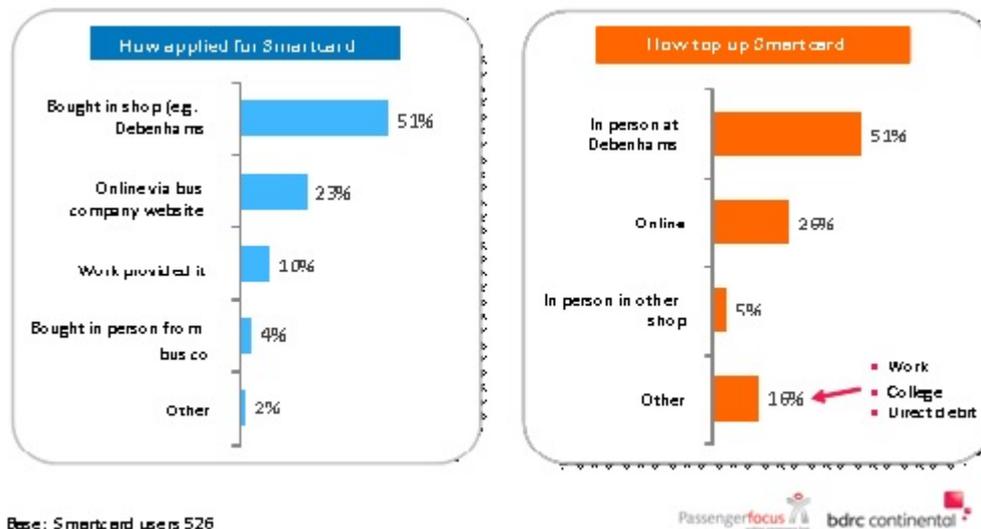
Base: Smartcard users 526

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As shown in Table 15, Debenhams has a large number of 'The Key' concession sales and is an important outlet for smartcards, especially for blue collar (C2DE)

passengers. Just over half (51 per cent) applied for their smartcard in person at Debenhams and the same proportion top up their cards there.

Table 15: how applied for/top up smartcard



An important reason for having a smartcard is to get better value for money. The convenience of using a smartcard was also mentioned. Bus passengers using bus services in Oxford spontaneously mentioned the following main reasons for getting a smartcard:

Better value for money	76%
Easy to use / convenient	29%
Better than using cash	15%
Can use with different operators	7%
Card provided by work / university	3%
Use the bus a lot	2%

5.5.1 Problems experienced with smartcards

Just over one in 10 (12 per cent) had experienced some type of problem with their smartcard. For most (84 per cent) these were isolated incidents rather than recurring problems and may well have been due to users becoming familiar with how the smartcard system works.

Table 16: problems experienced with smartcard

Amongst the 12% experiencing a problem the issues were:

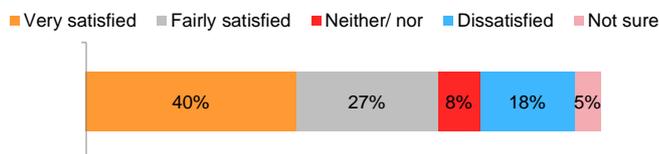
Would not work on touch point	37%
Problem topping up	34%
Lost card	10%
Incorrect ticket loaded	10%
Incorrect fare charged	2%
Other	18%

Base: Smartcard users with a problem 62

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Of the small number who had experienced a problem, 18 per cent expressed some dissatisfaction with the way their problem was sorted out, so some improvements to solving smartcard problems may still need to be considered. Passengers used the phone, internet or contacted the bus operator directly in order to sort out problems with smartcards..

Table 17: sorting out problems with the smartcard



Who contacted about problem:

- Telephone customer services 21%
- Called in at bus company 21%
- Sent email via website 18%
- Spoke to bus driver 15%
- Telephone number on Smartcard 5%
- Other 32%

Base: Smartcard users with a problem 62



5.5.2 Satisfaction with smartcards

Bus passengers who used a smartcard on Oxford bus services were asked to rate their satisfaction with various attributes of their smartcard on this scale:

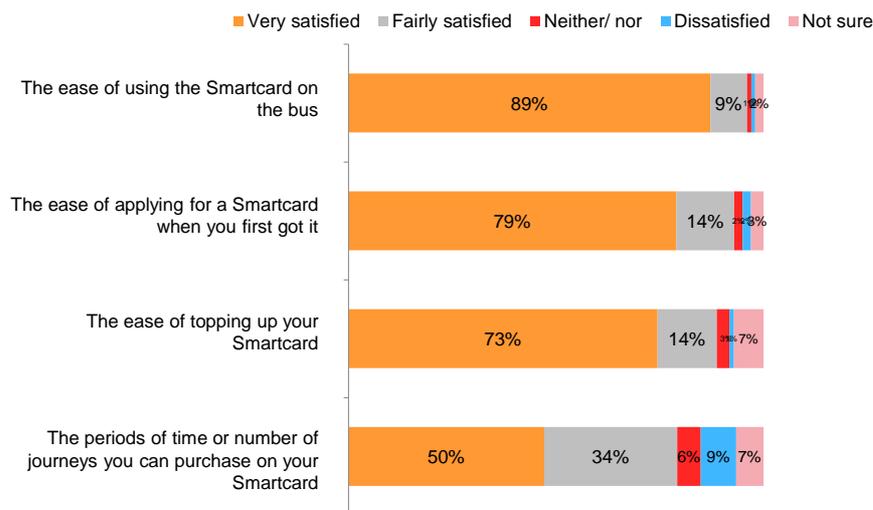
- very satisfied
- fairly satisfied
- neither satisfied nor dissatisfied
- fairly dissatisfied
- very dissatisfied
- not sure.

As few were either ‘fairly’ or ‘very’ dissatisfied these two scores have been combined in the following tables.

The functionality of smartcards was received well, with high numbers saying they were very satisfied with their ease of use, applying for a card, and topping them up.

Although they were satisfied with the ticket periods offered, a significant number were ‘quite’ rather than ‘very’ satisfied, and one in 10 were dissatisfied, suggesting other periods might appeal to passengers.

Table 18: satisfaction with different aspects of using a smartcard



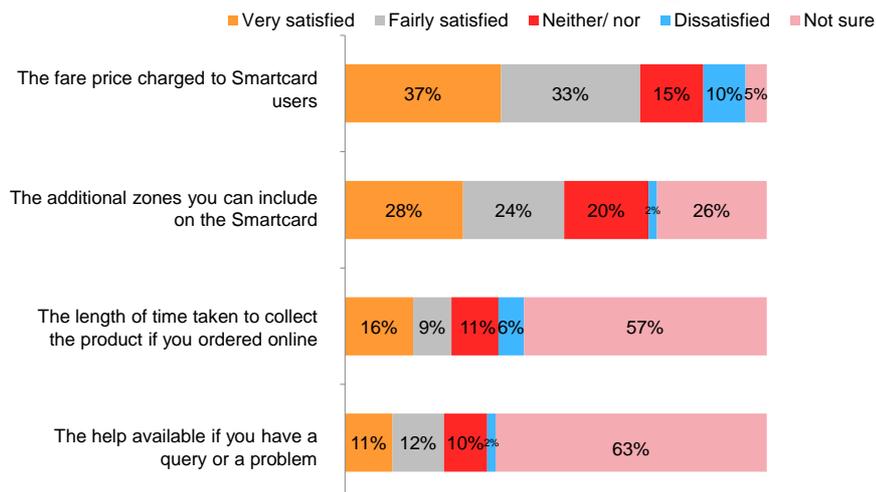
Base: Smartcard users 526



Seven out of 10 (70 per cent) smartcard users were satisfied with fares. This is higher than the average value for money score (55 per cent) in the BPS, though it should be noted that satisfaction with fares and value for money are not the same measure.

Fare prices are a sensitive issue for public transport users and any initiatives that reflect positively on this help improve perceptions of public transport. An area that could be improved is the zones included on smartcards covering the Oxford area. A fifth expressed some dissatisfaction with zone coverage, indicating that the ability to tailor areas may benefit users and potential users of bus services.

Table 19: satisfaction with different aspects of using a smartcard



Base: Smartcard users 526



5.5.3 Overall satisfaction

Most encouraging to note was the high satisfaction scores users gave the smartcard overall. 71 per cent were very satisfied, and 27 per cent were fairly satisfied. Therefore nearly all (98 per cent) were satisfied.

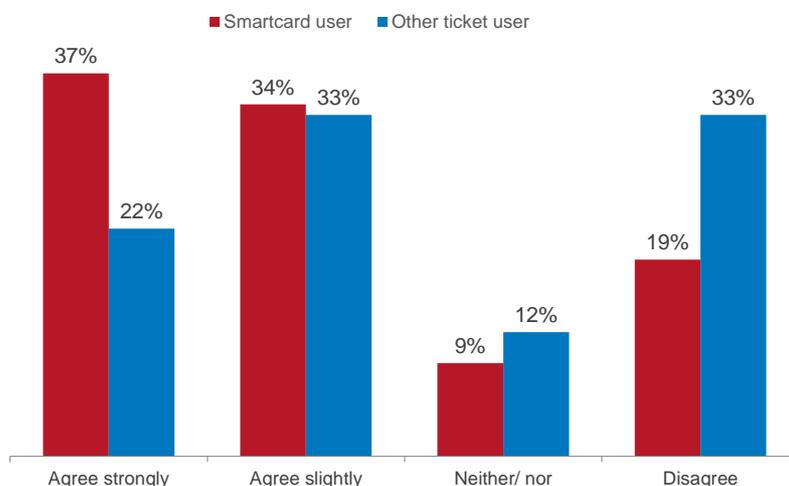
5.5.4 Satisfaction with the bus service

Overall satisfaction levels with bus services in Oxford were high (88 per cent were either very or quite satisfied). Very similar scores were given by smartcard users and other ticket users. This score was also very similar to the BPS score for Oxford (average 85 per cent).

Only six per cent said they were dissatisfied, and those who were not working (excludes retired) were a little more dissatisfied with the bus service than average – 12 per cent of those not working were dissatisfied.

Where smartcard users were different from other bus ticket users was on value for money. Many more (37 per cent) agreed strongly that bus services in Oxford provide value for money compared to 22 per cent of other ticket users. As the majority of smartcard holders had a weekly, monthly or annual pass, this will have influenced their rating. Also, as reported in Section 5.3.1, 28 per cent said they were using buses more as a result of having a smartcard - this too will have helped contribute to positive value for money perceptions.

Table 20: those who said the bus service in Oxford provides value for money



Base: Smartcard users and & non users 526/526

Passengerfocus  bdrcc continental 

Among all bus passengers just over a quarter (26 per cent) disagreed that the bus service in Oxford was value for money. Types of passengers who expressed higher dissatisfaction were:

- non-smartcard users: 33 per cent
- medium-frequency bus users: 34 per cent
- non-working passengers: 32 per cent.

5.6 Non-smartcard users

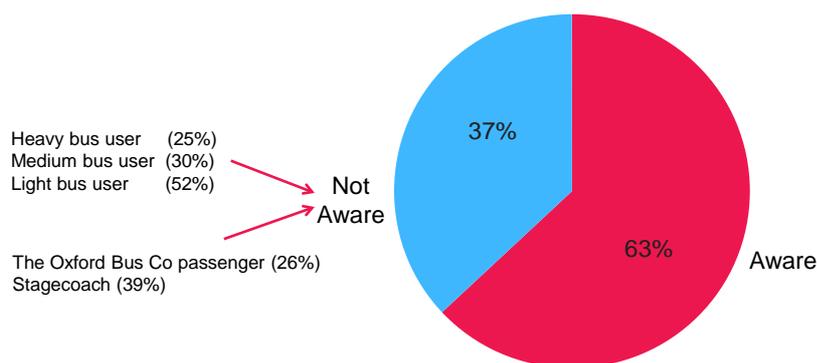
Although non-smartcard users had good awareness of smartcards (63 per cent were aware), likely future take-up was limited. Only one in 10 were 'almost certain' or 'very likely' to get a card.

The following brief description of the smartcard was used to ensure passengers were clear about the smartcard concept:

The SmartZone ticket can be loaded onto the smartcard such as The Key or Stagecoachsmart. You pay upfront for the ticket and it is loaded onto the smartcard and provides you with unlimited travel in the Oxford SmartZone area for a week, a month or a year.

Of those non-smartcard users who were not aware of smartcards, a small proportion (26 per cent) used Oxford Bus Company in comparison to Stagecoach passengers (39 per cent); suggesting local awareness of smartcards is relatively high.

Table 21: awareness of smartcard



Q: Are you aware of the Smartcard bus ticket? These are called the Key or the StagecoachSmart and are a plastic credit card sized ticket that you touch on a pad when entering a bus?

Base: All non Smartcard users: 526



In most instances the infrequency of using the bus service was the main reason for those without a smartcard to be likely to get one. The reasons given (unprompted) for unlikely take-up of a card are shown below.

Would not use it enough	55%
Don't use the bus enough	21%
Is too expensive/not value for money	8%
Prefer to pay as you go	8%
Happy with existing bus ticket	6%
Periods of time covered by ticket	2%
Have a concessionary ticket	2%

Not a resident in the area	2%
Other	5%

Non-users were asked if they had ever previously owned a smartcard for use on bus services in Oxford; 16 per cent were past users. The reason why they had stopped using their cards was mainly insufficient use of the card, and changes in lifestyle, for example changing jobs or stopping studying. The following is a full list of reasons.

Did not use it enough	28%
Expensive/not value for money	13%
Did not use bus enough	12%
Stopped working/studying	11%
Changed how travel on buses	10%
Too much hassle to top up	8%
Mainly use concessionary pass	4%
Prefer pay as I go	4%
Happy with existing bus ticket	2%
Did not cover specific area	2%
Not a resident in the area/moving	2%
Do not like paying money up front	2%
Kept losing it/stolen	1%
Length of time covered on ticket	1%
Other	12%

5.7 Smartcard enhancements

The survey also explored passengers' reactions to possible enhancements to the smartcard. The two ideas explored were:

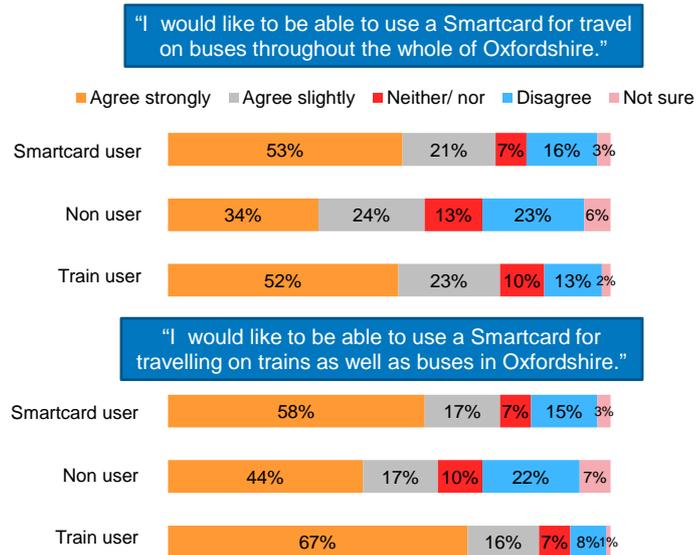
- A smartcard for travel on buses throughout the whole of Oxfordshire
- A smartcard for travel on trains as well as buses in Oxfordshire.

The table below shows how smartcard users, non-users and passengers who use the train once a month or more in the Oxford area felt about these ideas.

Overall passengers were receptive to both ideas, although the latter seems a little more likely to attract new users. Current smartcard users were keen on both propositions which may be explained by this group being heavier bus and public transport users generally. Similarly, once passengers start using smartcards they may be more open to increasing the transport option uses of their smartcard.

Train users were also keen on having smartcards on buses and, as expected, were the most in favour of multi-modal smartcards.

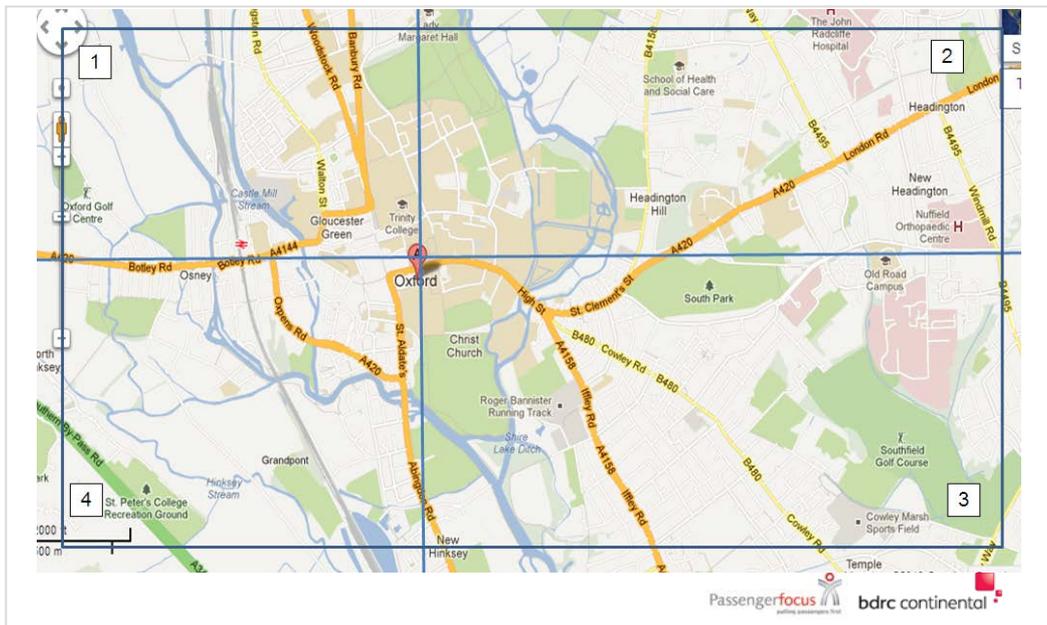
Table 22: interest in smartcard enhancements



Base: All 1,052

6. Appendices

A: Sampling Zones



B: Questionnaire

Serial No: _____ (1-5)
Card: 01 (6-7)

Job number: 20230 Smartcard Ticketing Research

Date: ____/____/____ **Time (use 24 hour clock)**

Interviewer name: _____ **No:** _____

Respondent Name: _____

Address: _____

Post code: _____

Tel No: _____

Accompanied by: (PLEASE PRINT)

Signature of supervisor _____

Signature of interviewer _____

INTRODUCTION:

Hello, my name is and I'm from the market research agency Perspective Research. We are carrying out a short survey about transport services in Oxford. May I ask you a few questions?

IF NECESSARY

The survey is being carried out for Passenger Focus, which is the official independent Watchdog representing the views of bus passengers.

IF RESPONDENT TOO BUSY TO DO SURVEY

That is fine if you don't have time now. We would still really like to speak to you and if you are agreeable carry out the survey with you over the phone at a time convenient to you?

IF YES

Can I just quickly check. Do you travel at least once a month by bus in the Oxford area covered on this map?

IF YES

HAND CONTACT SHEET TO RESPONDENT AND ASK THEM TO FILL IN THEIR NAME, TELEPHONE NUMBER, TIME OF DAY TO CALL, AND TYPE OF BUS TICKET USED.

Q1	Firstly how often do you use buses in Oxford or Oxfordshire? READ OUT	(8)
	5 or more days a week	1
	.....	Go to Q2
	2 to 4 days a week	2
	.....	Go to Q2
	About once a week.....	3
	.....	Go to Q2
	Two or three times a month	4
	.....	Go to Q2
	About once a month	5
	.....	Go to Q2
	Less often.....	6
	.....	close
	Never use buses in Oxford	7
	.....	close
	Not sure.....	8
	.....	close

Q2	And what type of ticket do you usually use when travelling on buses in the Oxford or Oxfordshire? SHOWCARD A	(9)
	Free concessionary pass and you never have to buy a bus ticket	1
	.....	close
	Free concessionary pass but you sometimes also have to buy a ticket.....	2
	.....	Go to Q3
	Paid for bus tickets.....	3
	.....	Go to Q3
	Other type of ticket	4
	.....	Go to Q3

Q3	What format is the bus ticket you usually buy? READ OUT	(10)
	Paper.....	1
	Smartcard (plastic credit card sized).....	2
	M-ticket (stored on mobile device)	3

**CHECK QUOTA:
ADD RESPONDENT TO EITHER THE SMARTCARD QUOTA OR OTHER TYPE OF TICKET
QUOTA**

Q4	RECORD GENDER (CHECK QUOTAS)	(11)
	Male.....	1
	Female	2

Q5 And what period do you usually buy a ticket to cover? **SHOWCARD B**

	(12)
1 single journey only	1
.....	Go to Q7
1 return journey only	2
.....	Go to Q7
1 day only	3
.....	Go to Q6
A few days	4
.....	Go to Q6
1 week	5
.....	Go to Q6
4 weeks	6
.....	Go to Q6
13 weeks/ term	7
.....	Go to Q6
1 year	8
.....	Go to Q6
Any 5 days	9
.....	Go to Q6
	(13)
12 trips	0
.....	Go to Q6
Other (specify)	1
.....	Go to Q6

Q6 Does the bus ticket you usually use cover only the zone around Oxford, or does it cover other areas or routes as shown on this card? **SHOWCARD C (CODE ALL THAT APPLY)**

	(14)
The central zone of Oxford only	1
The Airline (Heathrow/Gatwick airports)	2
Aylesbury area	3
Banbury area	4
Bicester area	5
London route (Oxford Tube/X90)	6
South Oxfordshire Zone	7
Park and Ride	8
Other	9
	(15)
Don't know	0

Q7 What do you use buses in the Oxford area for? **SHOWCARD D**

IF MORE THAN ONE REASON
Which one of these do you mainly use the bus for?

	All reasons	Main reason (one answer)
	(16)	(17)
Park and Ride	1	1
Travelling to/from work	2	2
Travelling to/from school/college	3	3
Shopping trips	4	4
Visit friends or relatives	5	5
Hospital/dentist/other personal business	6	6
Other leisure trips	7	7
Other (specify)	8	8

Q8 Which bus company or companies do you usually use nowadays in Oxford? **SHOWCARD E**
(CODE ALL THAT APPLY)

IF MORE THAN ONE MENTIONED
And which of these bus operators do you use the most? (CAN BE MULTICODED)

	Use nowadays	Use Most (one answer)
	(18)	(19)
The Oxford Bus Company	1	1
Stagecoach	2	2
Thames Travel	3	3
Brookesbus	4	4
Arriva	5	5
Heyfordian	6	6
Other (specify)	7	7
Not sure	8	8

Q9 And what is the number or numbers of the bus services you usually use? WRITE IN THE BUS ROUTE NUMBER OF THE SERVICE(S) USED

(20)

WRITE IN NUMBER 1
 WRITE IN NUMBER 2
 WRITE IN NUMBER 3
 WRITE IN NUMBER 4
 WRITE IN NUMBER 5
 WRITE IN NUMBER 6

Q10 For how long have you been using bus services in the Oxford area? **READ OUT IF NECESSARY** (21)

Last 6 months.....	1
6 months to 1 year	2
1 to 2 years	3
3 to 5 years	4
6 to 10 years	5
11 to 20 years	6
Over 20 years.....	7
Not sure.....	8

Q11 Overall how satisfied are you with the bus service in Oxford? **SHOWCARD F** (22)

Very satisfied.....	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied.....	4
Very dissatisfied.....	5
Not sure	6

Q12 Do you agree or disagree that the bus service in Oxford provides good value for money? **SHOWCARD G** (23)

Agree strongly	1
Agree slightly.....	2
Neither agree nor disagree	3
Disagree slightly.....	4
Disagree strongly	5
Not sure.....	6

Q13 In the last 1 to 2 years what changes have you noticed to the bus services operating in the Oxford area? **DO NOT PROMPT (CODE ALL THAT APPLY)** (24)

Buses are more frequent.....	1
You can use more than one bus company services with the same ticket	2
There are more buses.....	3
They have introduced more tickets	4
The routes are more logical	5
Some bus numbers have changed	6
There are too many buses	7
Buses have reduced traffic congestion	8
It's now easier to understand which bus to catch	9
(25)	
Buses are now better value for money	0
Other (specify).....	1
.....	2

Q14 Are you aware of the Oxford SmartZone on the bus network in Oxford? (26)

Yes - aware	1	
.....		Go to Q15
No not aware	2	
.....		Go to Q16
Not sure.....	3	
.....		Go to Q16

Q15 In which of these ways have you heard about the Oxford SmartZone on the bus network?
SHOWCARD H

		(27)
Friends colleagues told me about it	1	
Information on buses.....	2	
Information at bus stops.....	3	
Information at Debenhams.....	4	
Posters	5	
Leaflets.....	6	
Direct mail	7	
The radio	8	
Local newspapers/magazines.....	9	
		(28)
E-mail	0	
Internet.....	1	
Transport App	2	
Other (specify).....	3	
Not sure.....	4	

Q16 IF NOT AWARE OF SMARTZONE AT Q14 OTHERS GO TO Q17
The Oxford SmartZone means that you can make your outward journeys using one bus company and your return journey using a different bus company using the same ticket loaded on a smartcard.

Are you aware of SmartZone on the bus network in Oxford?

		(29)
Yes - aware	1	
.....		Go to Q17
No not aware	2	
.....		Go to Q20
Not sure.....	3	
.....		Go to Q20

Q17 ASK ALL AWARE OF SMARTZONE OTHERS GO TO Q20
Since the introduction of SmartZone in the Oxford area, do you think the bus service has become.... READ OUT

		(30)
A lot better	1	
A little better	2	
Made no difference	3	
A little worse.....	4	
A lot worse	5	
Not sure.....	6	

Q18 Looking at this card could you tell me which of these Oxford bus service initiatives you are aware of? **SHOWCARD i**

		Yes	No	Not sure
You can use buses operated by different companies with the same ticket	(31)	1	2	3
Some bus timetables have changed	(32)	1	2	3
The routes of some buses have changed	(33)	1	2	3
There are now more ways you can purchase a bus ticket	(34)	1	2	3
The choice of bus ticket types is greater	(35)	1	2	3

Q19 Here are comments some people have made about the Oxford bus service since changes have been introduced. For each could you tell me if you agree or disagree? **SHOWCARD J**
(ROTATE LIST)

		Agree strongly	Agree slightly	Neither/ Nor	Disagree slightly	Disagree strongly	Not sure
The buses are now more frequent	(36)	1	2	3	4	5	6
The bus timetables of the different operators now work more logically together	(37)	1	2	3	4	5	6
SmartZone ticketing products can save people money	(38)	1	2	3	4	5	6
The choice of ticket types is better	(39)	1	2	3	4	5	6
SmartZone has improved the overall efficiency of the bus service in Oxford	(40)	1	2	3	4	5	6
Bus congestion in the city centre has reduced	(41)	1	2	3	4	5	6
The bus route numbers are easier to understand	(42)	1	2	3	4	5	6
Being able to use the same ticket with different bus operator services is a big improvement	(43)	1	2	3	4	5	6
I use different operators now when before I only used to use one	(44)	1	2	3	4	5	6
I find it confusing to know which buses I can use my ticket on	(45)	1	2	3	4	5	6
SmartZone has made buses worse value for money	(46)	1	2	3	4	5	6

Q20 SMARTCARD USER SECTION - CHECK Q3 CODE 2 NON USERS GO TO Q37
You mentioned you use a smartcard bus ticket? Which one do you have.. **SHOWCARD K**
(CODE ALL THAT APPLY)

	(47)
Stagecoachsmart	1
Thames Travel - The Key.....	2
The Oxford Bus Company - The Key	3
Brookes Bus - The Key	4
Other specify	5

Q21	What were your main reasons for getting a smartcard bus ticket? DO NOT PROMPT (CODE ALL THAT APPLY)	(48)
	Better value for money	1
	Can use different bus operators.....	2
	Better than using cash	3
	Easy to use/convenient.....	4
	Covers a wide geographic area	5
	Offered a free trial / discounted smartcard.....	6
	Friends recommended it/had one	7
	Others can use the card too.....	8
	Don't like using the car	9
		(49)
	Parking is expensive in Oxford	0
	Other (specify).....	1

Q22	Does your smartcard allow you to use different bus operator's services or can you only use one bus company with your smartcard?	(50)
	Can use more than one company with same smartcard	1
	.....	Go to Q24
	Can use only one company with smartcard.....	2
	.....	Go to Q23
	Not sure.....	3
	.....	Go to Q24

Q23	ASK IF SMARTCARD CAN ONLY BE USED ON ONE OPERATOR OTHERS GO TO Q24 Why do you have a smartcard that can only be used with one bus operator rather than one that can be used with different bus companies in Oxford? DO NOT PROMPT (CODE ALL THAT APPLY)	(51)
	It's cheaper	1
	It's the only company that operates on the route I use	2
	I use this bus company the most	3
	Not aware you could get a multi-operator smartcard.....	4
	Other (specify)	5
	Not sure.....	6

Q24	When did you first obtain a smartcard to use on the Oxford bus network? READ OUT IF NECESSARY	(52)
	In the last 3 months.....	1
	3 to 6 months ago	2
	6 months to 1 year ago	3
	1 to 2 years ago	4
	Longer than 2 years ago	5
	Not sure	6

Q25 What type of ticket did you use before you changed to a smartcard? IF MORE THAN ONE MENTIONED ASK FOR THE ONE MAINLY USED (SINGLE CODE) SHOWCARD L (53)

Concessionary or free ticket e.g. free pass for elderly, disabled etc	1
Standard single or return paper ticket	2
One day paper ticket	3
Travelcard (not a smartcard) for use on different buses	4
One week travelcard	5
m-ticket displayed on mobile or printed at home	6
Other season ticket (not a smartcard)	7
Other ticket (specify)	8

Q26 How did you apply for your smartcard bus ticket? SHOWCARD M (54)

By post	1
Over the telephone.....	2
Online via bus company website	3
Bought in person at tourist office	4
Bought in person from bus company	5
Bought in shop (e.g. Debenhams)	6
Work provided it	7
Other	8

Q27 Since having a smartcard bus ticket as opposed to some other type of ticket would you say you use buses in the Oxford area... (55)

More than you did before	1
About the same amount.....	2
Less than you did before.....	3
Only started using buses since introduction of smartcard	4
Not sure.....	5

Q28 IF USE MORE AT Q27 ASK Q28 OTHERS GO TO Q29 What types of extra journeys are you now making as a result of having a smartcard for the Oxford bus network? SHOWCARD N (CODE ALL THAT APPLY) (56)

Going out in the evening	1
Park and ride	2
Travel to work.....	3
Travel to college.....	4
Shopping	5
Doctor/dentist/ personal business	6
Visit friends	7
Other (specify).....	8
Not sure.....	9

Q29 How do you usually top up your bus smartcard? READ OUT IF NECESSARY (57)

Online	1
In person in travel shop.....	2
In person at Debenhams.....	3
In person in other shop	4
In person on bus	5
Over the telephone.....	6
Other	7

Q30 Do you ever lend your smartcard to others to use? IF YES Who do you lend it to? READ OUT IF NECESSARY (CODE ALL THAT APPLY)

- (58)
- Spouse/partner..... 1
- Parent..... 2
- Son/daughter..... 3
- Brother/sister..... 4
- Other relative..... 5
- Friend/colleague..... 6
- Work colleague..... 7
- Other..... 8
- No do not lend to others..... 9

Q31 Overall how satisfied are you with the following aspects of using the smartcard? ROTATE LIST ORDER **SHOWCARD O**

		Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied	Not sure
The ease of applying for a bus smartcard when you got it	(59)	1	2	3	4	5	6
The ease of topping up your bus smartcard	(60)	1	2	3	4	5	6
The ease of using the smartcard on the bus	(61)	1	2	3	4	5	6
The fare prices charged to smartcard users	(62)	1	2	3	4	5	6
The help available if you have a query or problem	(63)	1	2	3	4	5	6
The periods of time or number of journeys you can purchase on your smartcard	(64)	1	2	3	4	5	6
The additional zones you can include on the smartcard	(65)	1	2	3	4	5	6
The length of time taken to collect the product if you ordered online	(66)	1	2	3	4	5	6

Q32	Have you ever had a problem or query with your smartcard that you have needed to contact the bus operator about?	(67)
	Yes - had one or two problems/queries	1
	.....	Go to Q33
	Yes - had several problems/queries	2
	.....	Go to Q33
	Yes - had many problems/queries	3
	.....	Go to Q33
	No problems/queries	4
	.....	Go to Q36

Q33	IF EXPERIENCED PROBLEM ASK Q33 OTHERS GO TO Q36 And what was the nature of your problems or queries? READ OUT IF NECESSARY (CODE ALL THAT APPLY)	(68)
	Incorrect ticket loaded onto smartcard.....	1
	Problem topping up smartcard	2
	Incorrect fare charge	3
	Lost smartcard	4
	Smartcard would not work on touch point.....	5
	Other (specify).....	6

Q34	Who did you contact? CODE ALL THAT APPLY SHOWCARD P	(69)
	Telephoned main switchboard	1
	Telephoned customer services	2
	Telephoned number provided on smartcard.....	3
	Telephoned another number (specify)	4
	Spoke to bus driver	5
	Called in at bus company offices	6
	Sent email via website	7
	Other (specify).....	8

Q35	How satisfied were you with the way your problem or query was sorted? If you have had several queries or problems please rate how these were handled overall. SHOWCARD Q	(70)
	Very satisfied.....	1
	Fairly satisfied	2
	Neither satisfied nor dissatisfied	3
	Fairly dissatisfied.....	4
	Very dissatisfied	5
	Not sure	6

Q36	Overall how satisfied are you with your smartcard bus ticket? SHOWCARD Q	(71)
	Very satisfied.....	1
	Fairly satisfied	2
	Neither satisfied nor dissatisfied	3
	Fairly dissatisfied.....	4
	Very dissatisfied	5
	Not sure	6

Q37 NON SMARTCARD USER SECTION - CHECK Q3 CODES 1 OR 3 USERS GO TO Q44
 Are you aware of the smartcard bus ticket? These are called The Key or the Stagecoachsmart and are a plastic credit card sized ticket that you touch on a pad when entering the bus.

(72)

Yes aware	1
No not aware	2
Not sure.....	3

Q38 The SmartZone ticket can be loaded onto the smartcard such as The Key or Stagecoach smart. You pay up-front for the ticket and it is loaded onto the smartcard and provides you with unlimited travel in the Oxford SmartZone area for either 1 week, a month or year. How likely are you to get a SmartZone ticket in the future? SHOWCARD R

(73)

Almost certain to	1
Very likely.....	2
Quite likely.....	3
Not very likely.....	4
Not at all likely	5
Already have one	6
Not sure.....	7

Q39 IF NOT LIKELY
 Why are you not likely to get a smartcard bus ticket in the future? DO NOT PROMPT (CODE ALL THAT APPLY)

(74)

Applying for one is too much hassle	1
Is too expensive/not represent value for money	2
Prefer to pay as I go.....	3
Do not like paying directly out of bank account	4
Too complex/ don't understand it.....	5
Does not cover a particular area/bus service.....	6
The periods of time covered by the ticket are not suitable	7
Would not use it enough	8
Would lose it/ get stolen.....	9

(75)

Don't use the bus enough/ never know when I will use the bus	0
Happy with regular bus ticket.....	1
Other reason (specify).....	2
Not sure.....	3

Q40 Have you ever had a smartcard for use on buses in the Oxford area?

(76)

Yes	1
.....	Go to Q41
No.....	2
.....	Go to Q42

Q41 IF YES OTHERS GO TO Q42
Why did you stop using your bus smartcard? (CODE ALL THAT APPLY) (77)

Too much hassle to top up.....	1
Expensive/not value for money.....	2
Don't like paying money up front.....	3
Prefer to pay as I go.....	4
Did not like paying directly out of bank account.....	5
Too complex/ did not understand it.....	6
Does not cover a particular area/bus service.....	7
The length of time covered by the ticket was not suitable.....	8
Have changed how I travel on buses.....	9
(78)	
Did not use it enough.....	0
Kept losing it/ got stolen.....	1
Don't use the bus enough/ never know when I will use the bus.....	2
Happy with regular bus ticket.....	3
Other reason (specify).....	4
Not sure.....	5

Q42 Does anyone else in your household have a smartcard that can be used on the Oxford bus network? IF YES Who? (CODE ALL THAT APPLY) (79)

Spouse/partner.....	1
Parent.....	2
Son/daughter.....	3
Brother/sister.....	4
Other.....	5
No ONE.....	6

Q43 Do you ever borrow anyone else's smartcard to travel on the Oxford bus network? (80)

Yes regularly.....	1
Yes sometimes.....	2
Yes but only rarely.....	3
No never.....	4

Q44 ALL TO ANSWER
How much do you agree with ... **SHOWCARD S**

card: 02 (6-7)

		Agree strongly	Agree slightly	Neither Agree nor disagree	Disagree slightly	Disagree strongly	Not sure
I would like to be able to use a smartcard for travel on buses throughout the whole of Oxfordshire	2(8)	1	2	3	4	5	6
I would like to be able to use a smartcard for travelling on trains as well as buses in Oxfordshire	(9)	1	2	3	4	5	6

These next few questions are just to ensure we interview a good cross section of people.

Q45 To ensure we interview a wide cross section of people which one of the following age groups do you fall into? **SHOWCARD T** (CHECK QUOTAS)

	(10)
16-18	1
19-25	2
26-34	3
35-44	4
45-54	5
55-59	6
60-70	7
70+	8
Refused.....	9

Q46 Are you

	(11)
Working full time (30+ hours a week)	1
Working part time (under 30 hours)	2
Not working/seeking work	3
Retired.....	4
Full time student.....	5
Other	6

Q47 Which of the following best describes the occupation of the Chief Wage Earner in your household? **SHOWCARD U** (12)

Professional/Senior Managerial	1
Middle Managerial.....	2
Junior Managerial/Clerical/Supervisory	3
Skilled Manual (professional qualifications/served an apprenticeship)	4
Unskilled Manual (no qualifications/not served an apprenticeship)	5
Full time student.....	6
Retired.....	7
Unemployed/between jobs.....	8
Housewife/househusband.....	9
Other (specify).....	0

Q48 What is your home postcode? This will be used for research purposes only. **WRITE IN** (14)

..... 1

Q49 Have you used any of these in the last 12 months..... (CODE ALL THAT APPLY) **SHOWCARD V** (15)

An Oyster Card in London	1
Another transport company's smartcard	2
A contactless credit or debit card used to purchase small items. Also known as 'wave and pay'.....	3
Other type of smartcard e.g. gym card (specify).....	4
No not used any	5
Not sure.....	6

Q50 Which of these types of transport do you use at least once a month or more to get around the Oxford area? **READ OUT AND CODE ALL THAT APPLY** (16)

A car that you drive	1
As a car passenger	2
A bicycle.....	3
The train	4
None of these	5

Q51 Do you have a disability or long term illness related to the following? **SHOWCARD W** (CODE ALL THAT APPLY) (17)

No - none	1
Mobility	2
Wheelchair user	3
Hearing.....	4
Eyesight	5
Speech impairment	6
Learning difficulties	7
Other	8

To help us further understand the transport needs of people we would like to interview bus passengers further on this subject. This further interview would either be carried out over the telephone or in person at a time suitable to you. The interview would be take around 1 hour and allow you to say in your own words what your views are on transport services. As a thank you you will be paid £30 for your help. Would you be able to help? IF YES ASK RESONDENT TO FILL IN NAME, TELEPHONE NUMBER AND EMAIL ADDRESS BELOW.

Name

Telephone number

Email address

time interview ended (use 24 hour clock) _____

I declare that this is a true record of a face-to-face interview with the named respondent which was carried out within the Market Research Society Code of Conduct in accordance with instructions in the Interviewers' Manual

Name of Interviewer _____

Signature: _____ DATE: __/__/__

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