Transport for the North
Integrated and Smart Ticketing Research 1
Prepared for: Transport Focus
11 January 2016

PREPARED BY ILLUMINAS
a global team based in London, New York and Austin

Prepared in compliance with the International quality standard covering market research, ISO 20252 (2012), The MRS Code of Conduct, and the Data Protection Act 1998 by Illuminas, 183-203 Eversholt Street, London NW1 1BU, UK

T +44 (0)20 7909 0929 F +44 (0)20 7909 0921 E info@illuminas-global.com

www.illuminas-global.com

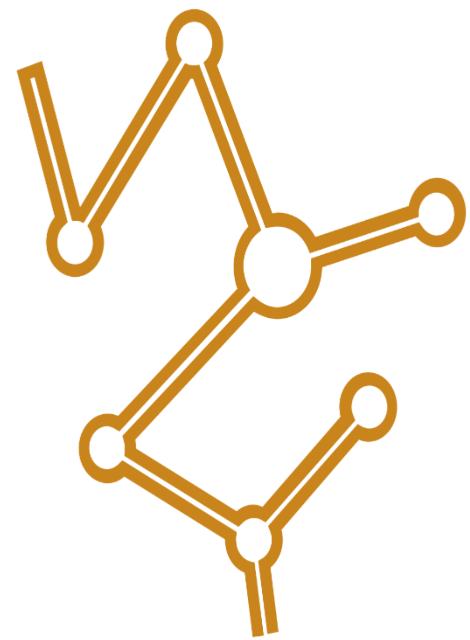
Illuminas

Background & Objectives

Background and the need for research

One of the aspirations of the 'Northern Powerhouse' is to improve transport links between the city regions of the North; in particular better connectivity between the east and west regions. This will in turn encourage public transport use, ease of travel (seamless travel across northern cities) and cheaper travel. It is believed this can, in part, be achieved through the introduction of seamless smart ticketing scheme, that is accessible across the region; for use on all modes of transport, with a standardised/simple fare structure. A handful of schemes are underway in Northern locations. However, each has been developed independently and each has its own identity, brands, scope and business goals, rendering smart travel within the North inconsistent.

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



Research was required to develop a baseline understanding of current perceptions of travel within the region as well as understanding needs and wants from a smart ticketing system.

Objectives

The overall aim of the research was to understand current experiences of public transport in the North and the attitudes of those using it (and those choosing not to). In particular the research needed to establish preferences and requirements with regards the future of public transport, specifically in terms of smart ticketing

Research objectives

- To understand the current transport landscape; the frequency of travel between cities or regions, for what reasons, and by what mode and method (public or private)
- To explore the decision- making process involved in choosing the modes of transport used for particular journeys, to help determine the importance and preference placed on public transport
- To understand passengers' overall experiences (positive, negative, frustrations ticketing, journey planning etc.) with public transport and determine where are the gaps, particularly in relation to ticketing
- To gain a broad understanding of smart technology and a more specific understanding of attitudes towards smart ticketing schemes
    - current awareness and usage / attitudes towards different smart technology and existing smartcard schemes in the north and further afield
    - perceptions of smartcard use for travel on public transport services, and in particular key motivations / barriers for take up, the implications of doing so, and most particularly the effects on use of current / potential ticketing products.

Illuminas

Methodology

Method: qualitative and quantitative research

QUALITATIVE RESEARCH

The qualitative research consisted of:

11 x 2 hour focus groups

12 journey audits
(completed prior to the groups)

QUANTITATIVE RESEARCH

The quantitative research consisted of:

407 x 20 minute online interviews

Sample profile

Group criteria and quota split

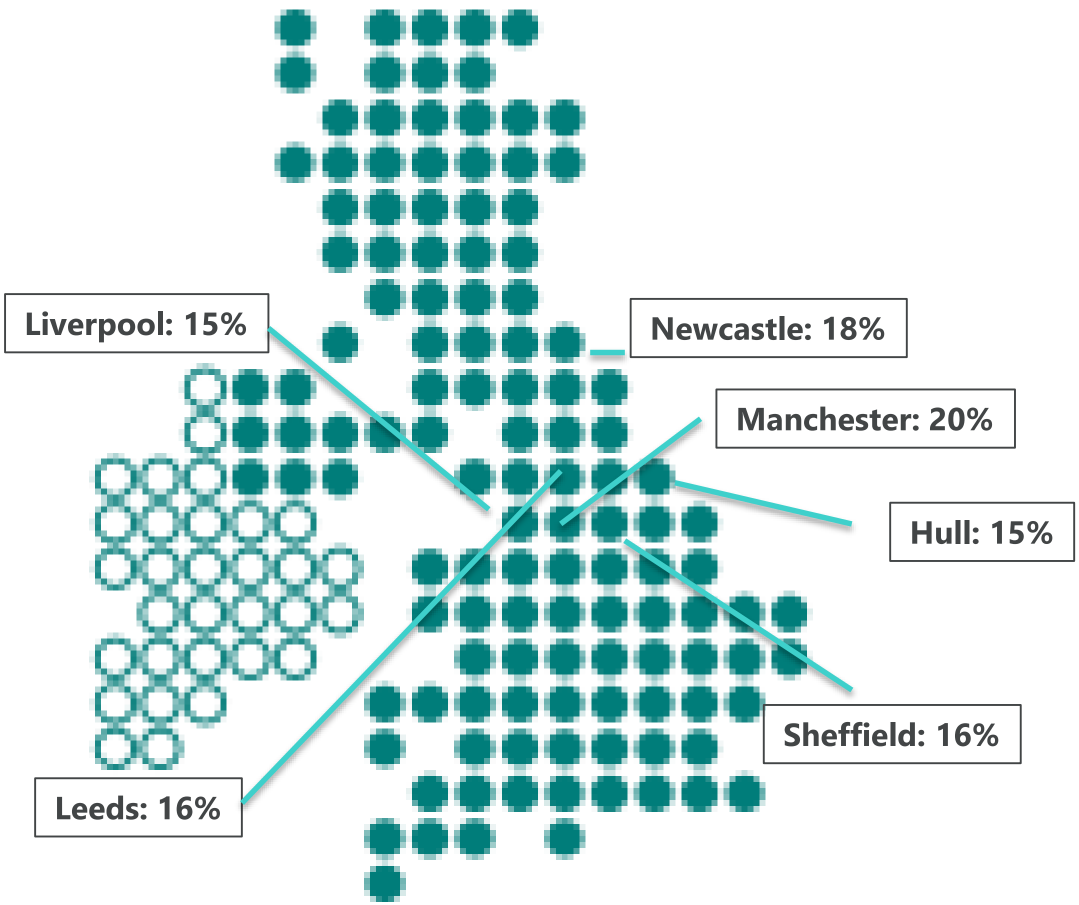
Fieldwork dates: 30th November to 9th December 2015

	Location	Public transport Customer type	Specific criteria
Group 1	Manchester	Commuter	Mix of season tickets (annual, monthly, weekly) and some local travellers
Group 2	Manchester	Leisure	Some journeys outside of the North and some tram users Mix of carnets / day tickets & some weekly season tickets and some smartcard users
Group 3	Leeds	Business	Some journeys between city regions Some carnets and some who purchase tickets themselves
Group 4	Leeds	Leisure	Mix of carnets / day tickets & some weekly season tickets and smartcard users
Group 5	Sheffield	Leisure	Mix of carnets / day tickets & some weekly season tickets and some smartcard users
Group 6	Sheffield	Business	Some journeys between city regions Some carnets and some who purchase tickets themselves
Group 7	Liverpool	Commuter	Mix of season tickets (annual, monthly, weekly)
Group 8	Liverpool	Leisure / Visitors	Some ferry users Mix of day tickets (single, return) and some smartcard users
Group 9	Newcastle	Business	Some journeys between city regions Some carnets and some who purchase tickets themselves
Group 10	Newcastle	Leisure / Visitors	Some ferry and metro users and some local journeys Some POP smartcard users
Group 11	Hull	Commuter	Mix of season tickets (annual, monthly, weekly) and some local travellers

Respondent background

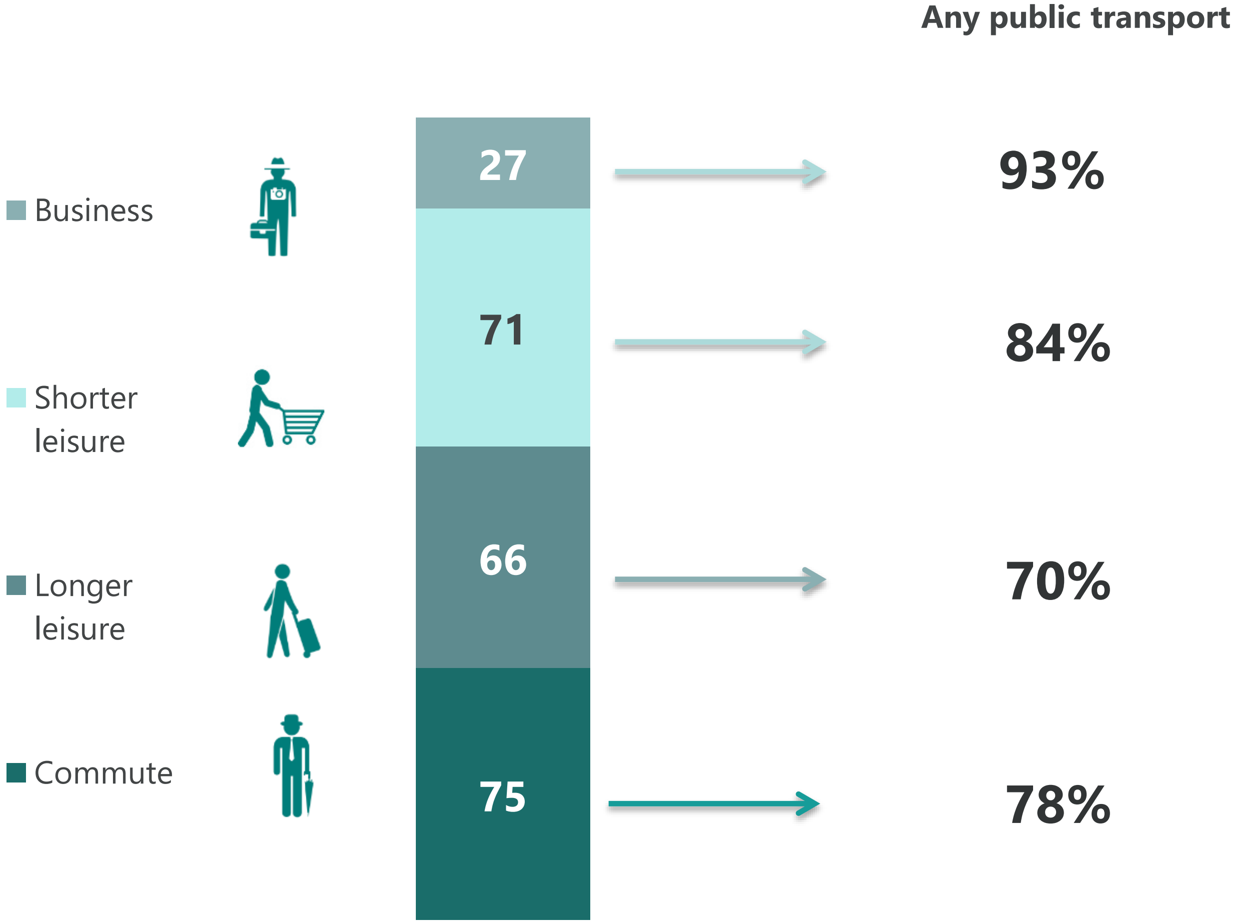
REGION

QS1. Which city do you live closest to? (%)



Base: all respondents (n=407);

Public transport usage is high across all journey types, most markedly in terms of business travel. Longer leisure is most likely to be undertaken under private means



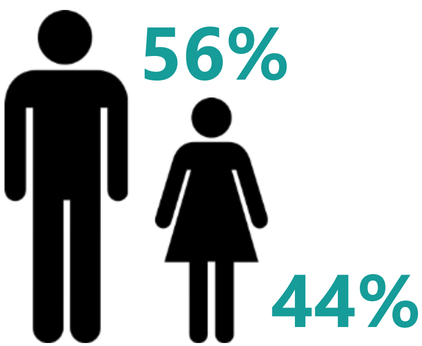
Two thirds of our sample make journeys for more than one purpose, with shorter leisure and commuting the most common combination

Base: all respondents (n=407)

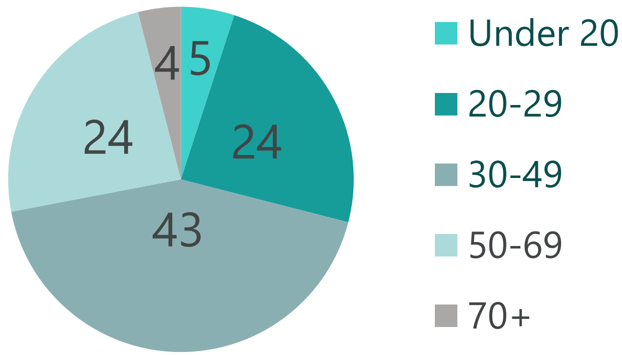
Respondent profile

TOTAL n = 407

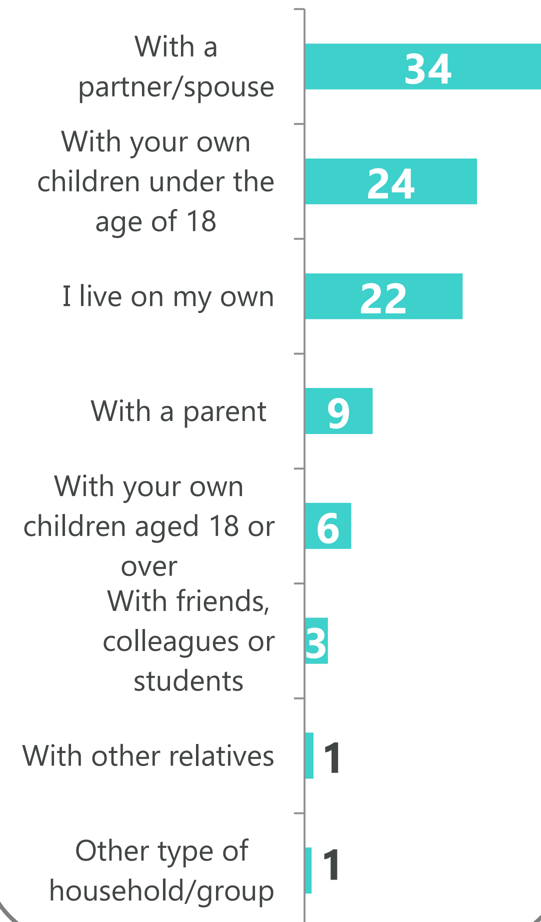
QP1. Gender (%)



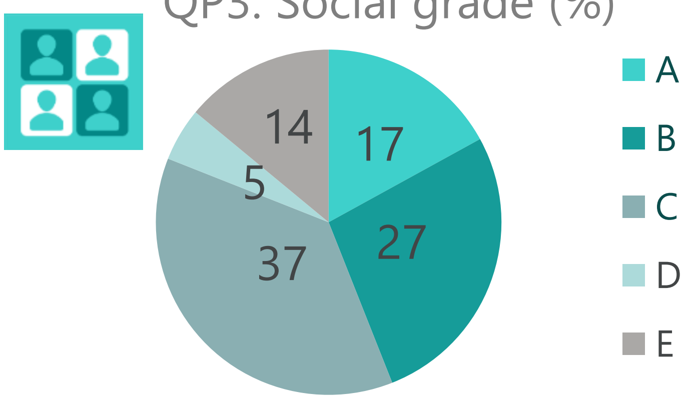
QP2. Age range (%)



QP7. Household (%)

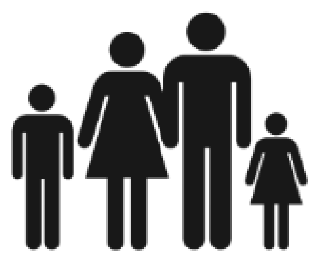


QP3. Social grade (%)



QP8. Number of children have living at home under the age of 18 (Average)

2.0



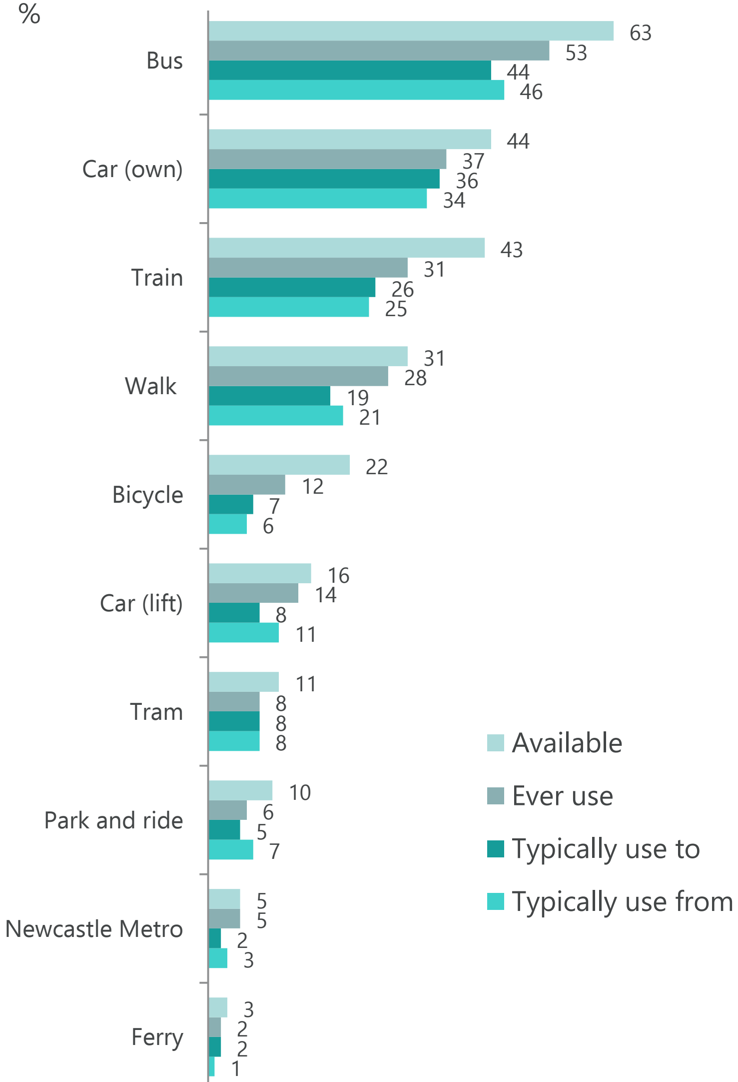
Base: n=96

Commuter profile I

Modes of transport used

Base: Commuters (306)

Q2a/b/c/d. When travelling to and from work/college/university, what types of transport are available, which do you ever use, which do you typically use?



Average no of modes of transport ever use: **2**

78% use public transport
22% don't use public transport

Overall satisfaction (top 2 box) with public transport for commuting

Q41a. How satisfied are you overall with the public transport you use to travel to work/college/university?

(Base: commuters using public transport 239)

79%

Reasons why different modes sometimes used to commute (TOP 3)

Q4a. Why is it that you sometimes travel to and from work/college/university using different types of transport? (PROMPTED LIST)

Base: Commuters who use different modes (236)

- **47%** weather conditions
- **34%** Sometimes convenient based on other plans that day
- **25%** Awareness of disruption

Barriers to using public transport (TOP 5 barriers) (NB LOW BASE)

Q3a. Why don't you use public transport to travel to/from work/college/university? (PROMPTED LIST)

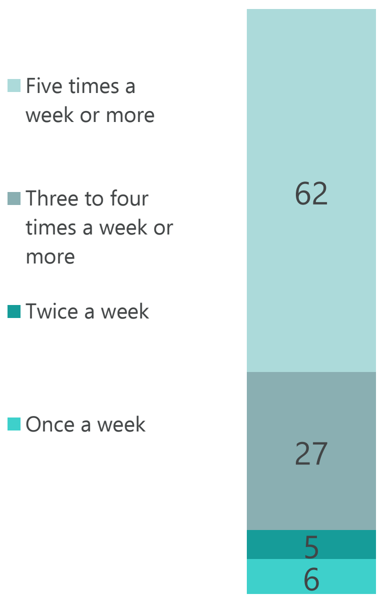
- **38%** Takes too long
- **32%** Fares too expensive/ cheaper to drive or walk
- **28%** Unreliable
- **24%** Services too infrequent
- **19%** Would have to use multiple forms of transport

Base: Commuters not using public transport (47)

Commuter profile II

Frequency of travel
Base: Commuters (306)

Q5a. On average, how often do you travel to work/college/university?



Base: Commuters (306)

Journey length

Q5b. How long, door to door, does a journey typically take?

	Public transport	Private transport
	6%	13%
	25%	23%
	27%	28%
1 hour	34%	26%
> 1 hour	18%	9%

Base: Commuters (306)

Commuter profile III

Single versus multi mode journeys (typical journey to/from work)

Q2c/d. What types of transport do you use on your typical journey to/from work/college/university?

	TO WORK		FROM WORK	
Single mode	67%	Car 40% Bus 28% Train 10%	63%	Car 39% Bus 26% Train 12%
2 modes	20%	Bus & train 33% Walk & train 22%	21%	Bus & train 32% Walk & train 25%
3 modes	8%		10%	
> 3 modes	5%		6%	

(Base: commuters (306)

Overlap between modes used to commute and for short leisure purposes

28% same mode

59% some of the same modes

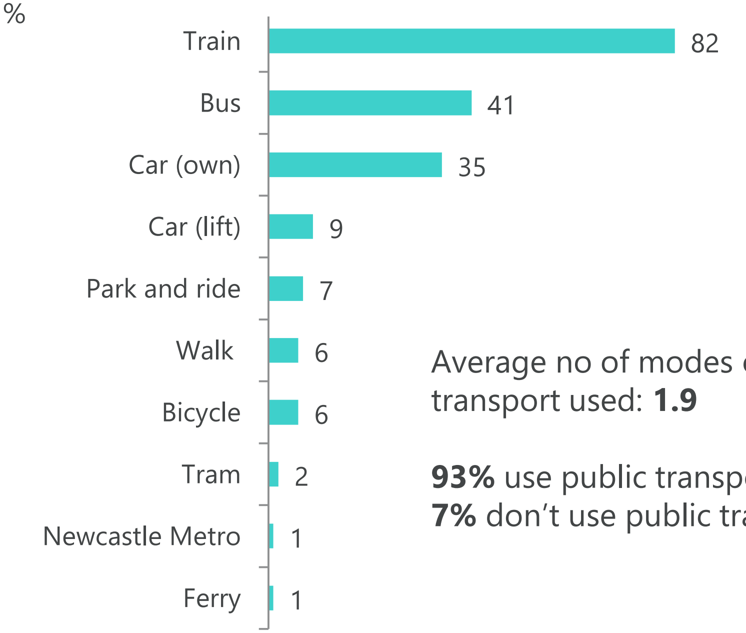
13% different modes

Base: those who commute and make short leisure journeys (186)

Business profile

Modes of transport used

Q24. Which types of transport do you use when travelling longer distances for business? Base: Long distance business travellers (127)

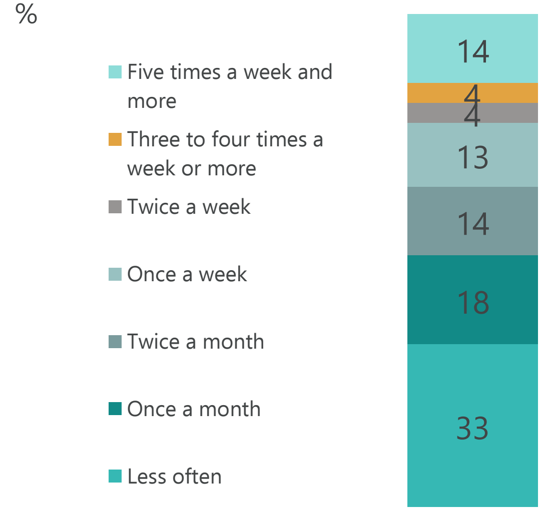


Average no of modes of transport used: **1.9**

93% use public transport
7% don't use public transport

Frequency of travel

Q27. On average, how often do you travel longer distances for business? Base: Long distance business travellers (127)



Overall satisfaction (top 2 box) with public transport for business travel:

Q41c. How satisfied are you overall with the public transport you use to travel longer distances for business?

91%

Base: Business travellers using public transport (118)

Reasons why use modes of public transport

Q26a. Why do you use these types of transport when travelling longer distances for business?

52% Cost

40% It is organised for me

38% Ease

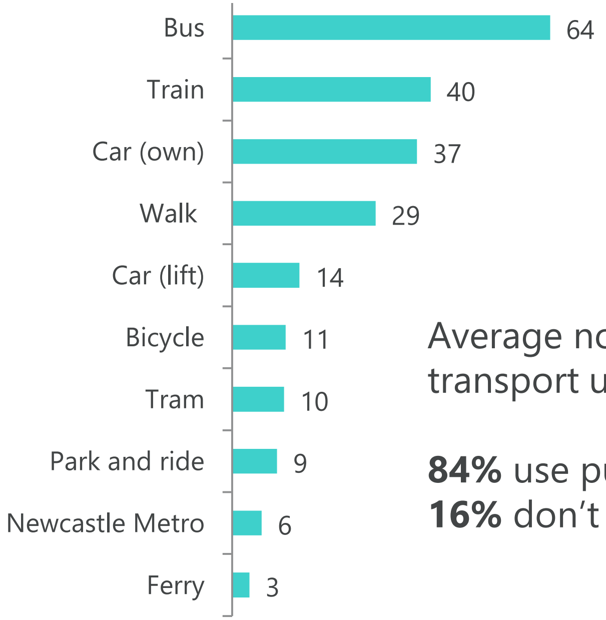
17% Company policy

Base: Business travellers using public transport (118)

Short leisure profile

Modes of transport used

Q13. Which types of transport do you use when travelling for everyday personal/leisure reasons? Base: Short distance leisure (287)

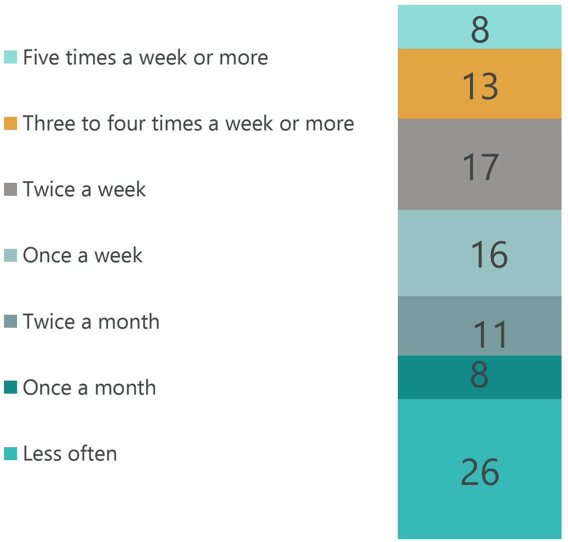


Average no. of modes of transport used: **2.2**

84% use public transport
16% don't use public transport

Frequency of travel

Q14a. On average, how often do you travel for everyday personal/leisure reasons? Base: Short distance leisure (287)



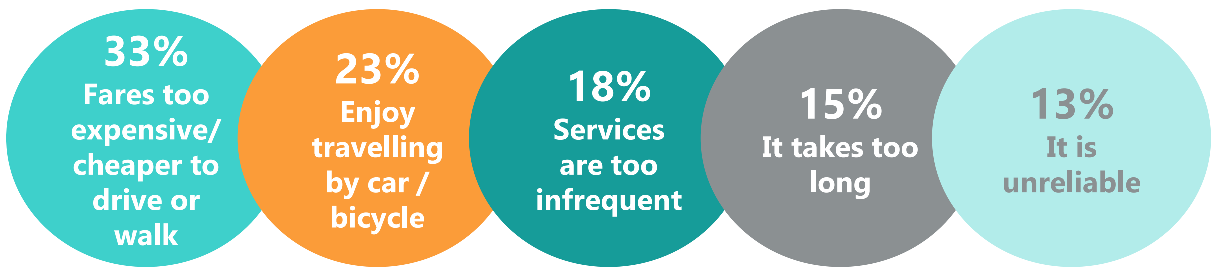
Overall satisfaction (top 2 box) with public transport for short leisure:

Q19. How satisfied are you overall with the public transport you use to for everyday leisure/personal reasons?

Base: Short leisure public transport users (241)

Barriers to using public transport (TOP 5 barriers) (NB LOW BASE)

Q12a. Why don't you use public transport for everyday personal/leisure reasons? (PROMPTED LIST)



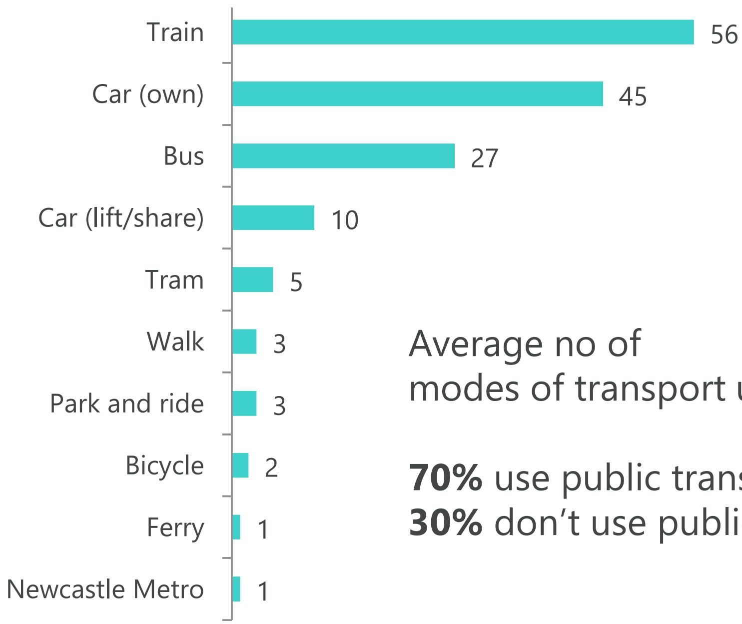
Base: Short leisure not using public transport (46)

Long leisure profile

Modes of transport used

Q35. Which types of transport do you use when travelling longer distances for personal/leisure reasons? % Base: Long distance leisure (268):

%



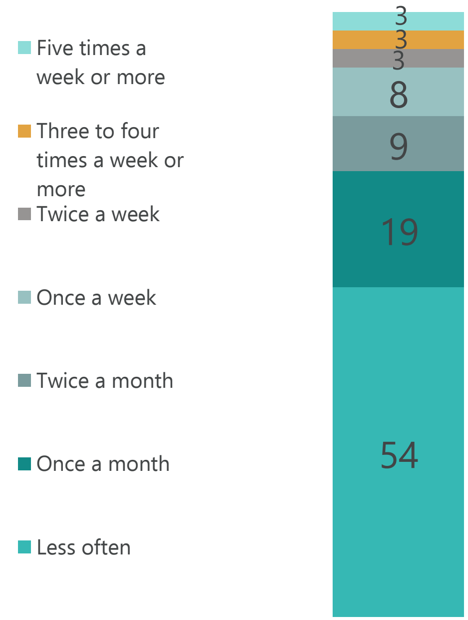
Average no of modes of transport used: **1.5**

70% use public transport
30% don't use public transport

Frequency of travel

Q37. On average, how often do you travel longer distances for personal/leisure reasons?

Base: Long distance leisure: 268



Overall satisfaction (top 2 box) with public transport for longer leisure:

Q41d. How satisfied are you overall with the public transport you use to travel longer distances for leisure reasons?

86%

Base: Long distance leisure public transport users (188)

Barriers to using public transport (TOP 5 barriers)

Q36a. Why don't you use public transport when travelling longer distances for leisure reasons? (PROMPTED LIST)

40% Fares too expensive/ cheaper to drive or walk

35% It takes too long

24% Services are too infrequent

15% It is too crowded

14% There are no stations / stops near where I travel to

Base: Long leisure not using public transport (80)

Where is the North?

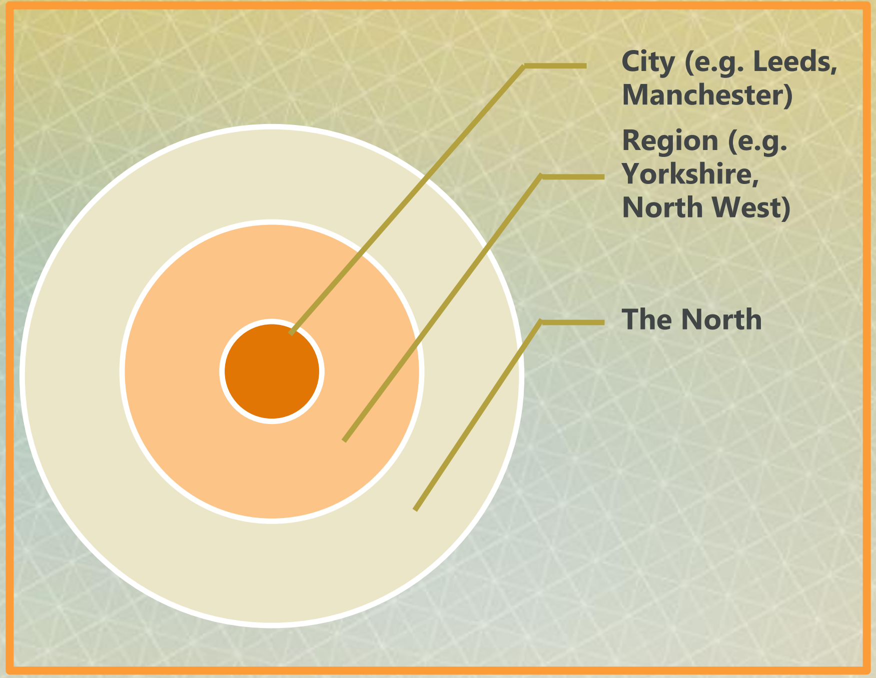
There is a 'North' but more local identities are often more important and more concrete

- There is an idea of **The North** that most people can identify with
- There is also a broad consensus about **the region's boundaries**
- That said, **The North** is only one (and often not the most important) geographic identity that people living in the North ascribe to

"You've got the Lake District and the borderlands, that is really quite a different area…They're separate parts of the North but you've got a lot of hubs around Leeds, Manchester, Liverpool and Sheffield, that are very different from as you go further North and in that way we have a different sort of identity in many ways to others…I think you could probably say Yorkshire has a very separate identity to some of the other parts of the North, and I would feel an affinity with a Yorkshire brand, but not with Newcastle or with the Lake District."
(Leeds, Business)

City, County and sub-region typically rank ahead of the North per se in terms of identity

- Respondents' typically have a clear hierarchy in terms of their frame of reference and concerns about the region
- Thus, **'the North'** tends to sit below home City, a wider region (such as the North West or Yorkshire) then to include neighbouring regions (e.g. Lancs if in Yorks and vice versa) and only then, the North
- Even then, there are parts of the North that appear to be 'terra incognita' for those not living there (typically the furthest-flung parts of the region such as Humberside and Northumbria)
- In part, of course, this distance (as much temporal as physical) and perceived lack of connectedness highlight some of the challenges Transport for the North is intended to address



"There's like Leeds, loads of hills and stuff and then Newcastle and then Scotland." (Leeds, Business)

Transport in the North?

Everywhere is different, but also the same: local transport

- There is, unsurprisingly, much more comment about local transport rather than larger regional concerns
- While each city has unique issues, there is a large degree of commonality in terms of transport problems and priorities

- **Lack of direction:** Little sense of there being a clear organising force around public transport on a city basis
    - Some awareness/ understanding of role of local authorities and local transport agencies, but often difficult for passengers to see how this is manifest in terms of a 'network'

- **Fragmented:** While some parts of the system within individual cities appear 'joined up' (e.g. Manchester's Trams), services often feel uncoordinated, even within single modes and even more so between modes

- **Opaque:** There is no single 'go-to' resource in any city for planning and information. Passengers have found different sources of information but usually as a result of 'trial and error'. These include Transport Authority sites, individual company sites or simply Google
- There are more recognizable sources for wider travel (esp. rail) transport: National Rail, Trainline.com etc.

- **Inconsistent:** There are many examples of improvements to transport in the North, but service standards and journey experiences vary widely (e.g. in terms of coverage, service frequency, quality of vehicles/ rolling stock etc.)

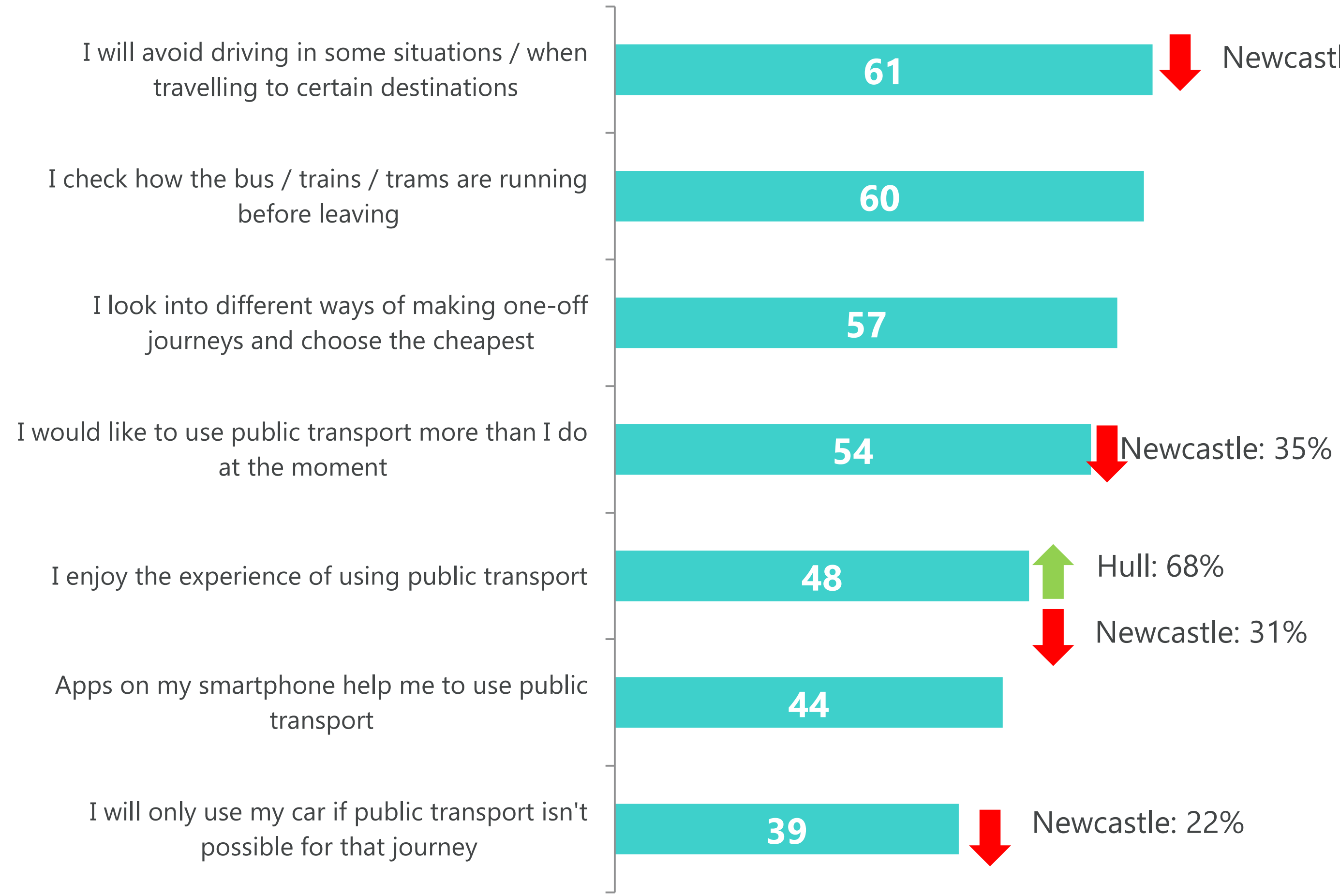
- **Ticketing:** is problematic, but is seen as a symptom, rather than a cause of wider local transport issues

"There's not a payment card is there that you could use on all the buses which would be fantastic." (Leeds, Business)

"More connectivity between the buses and trains, you know? I'd love it if I could get a train ticket on my bus, if my journey to the train station to get the train to then come back to then get the same bus. It makes sense to be able to get a sort of dual ticket for the full journey." (Manchester, Leisure)

There is a reasonable desire to use public transport more than currently (54% overall). Financial considerations seem likely to impact

Q53. How much do you agree with the following statements about using public transport?...(top 2 box %)



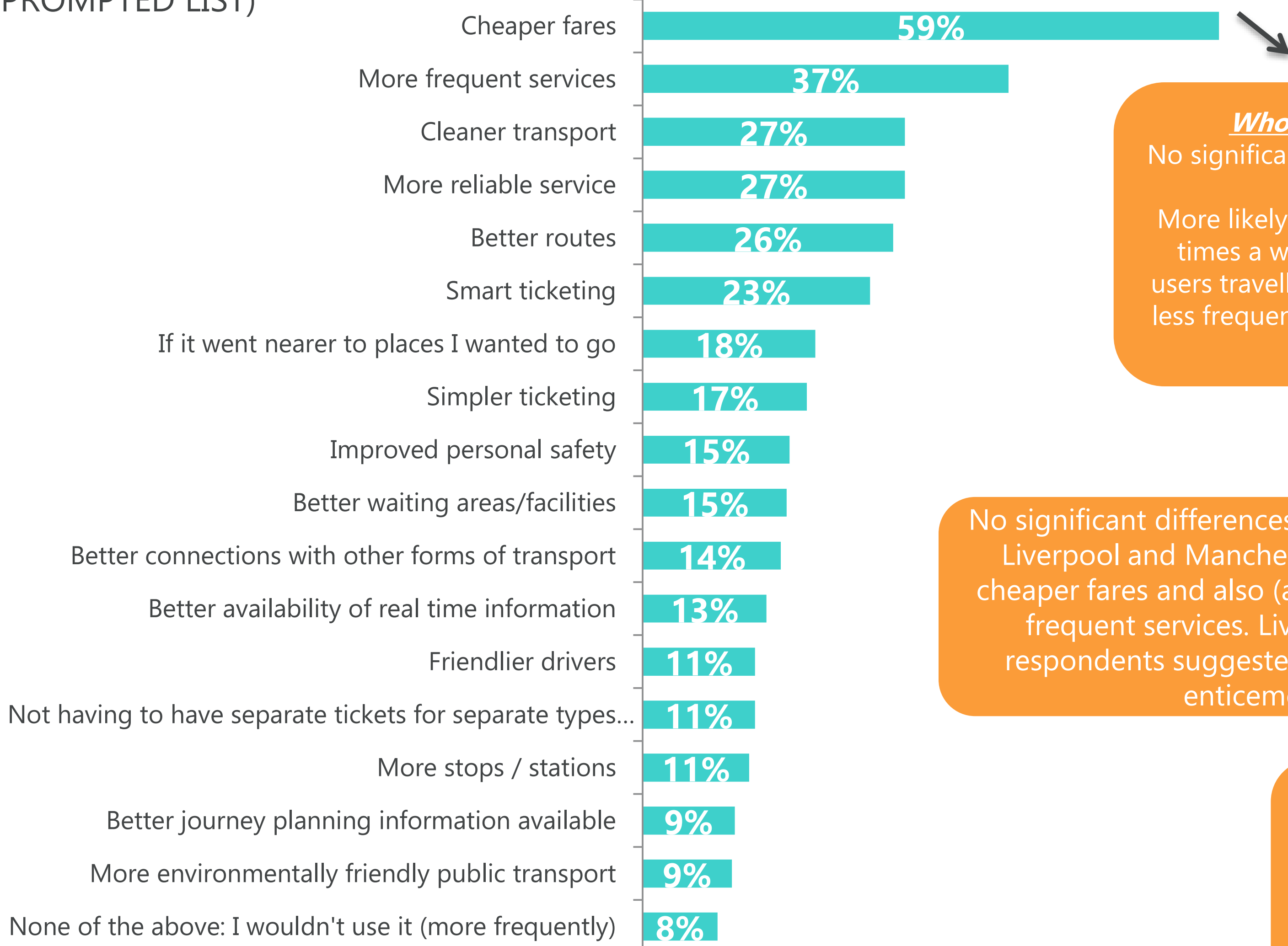
Who wants to use PT more?
More likely to be those that use public transport for all journey types (commuters, leisure and business)

Who enjoys using PT more?
More likely those that make leisure journeys as part of their public transport usage

Base: all respondents (n=407)

Cheaper fares, and to a lesser extent more frequent services were the key changes that would motivate more frequent use of public transport. Smart ticketing was the 6th most mentioned factor to encourage use

Q54a. What would encourage you to use public transport more frequently than you are now…? %
(PROMPTED LIST)



Who wants cheaper fares?
No significant differences by journey type

More likely to be commuters traveling 5 times a week and more, short leisure users travelling once or twice a week and less frequent (once a month or less) long leisure users

No significant differences by region but directionally, Liverpool and Manchester are more likely to say cheaper fares and also (along with Newcastle) more frequent services. Liverpool and Manchester respondents suggested the greatest number of enticements overall

MEAN GIVEN:
Hull: 2.9
Leeds: 3.1
Liverpool: 4.3
Manchester: 4.2
Newcastle: 3.2
Sheffield: 2.5

Base: all respondents who could use public transport more (n=341)

Local issues: Manchester

- **Manchester: Overall Mancunians feel that their city is well served, with the Metro providing the ‘backbone’ of the system combined with a ubiquitous bus service. Some limited awareness of ‘Get Me There’ - but the need for an integrated smartcard-type approach is raised spontaneously**

- The metro is now embedded into Manchester life and as it has grown has given the feel of a genuine (and approaching city-wide) network
- Quick and efficient for both cross-city and local journeys
- But also suffers from too-frequent disruption and can be heavily congested at peak times

- Buses are seen as plentiful and cheap and covering the entire city region
- Coordination is a problem – passengers identify the city’s ‘North-South’ divide on bus services and lack of interoperable tickets is an issue

- Local trains the ‘poor relation’ in terms of transport in Manchester
- Old and uncomfortable rolling stock and frequently unpleasantly congested

Local issues: Newcastle

- **Newcastle: Low take up of POP smartcard due to low awareness and understanding of the scheme. Buses prove to be the most accessible and therefore popular choice for travel within central Newcastle, yet many would like to see a group discount ticket offered, as cost of day/return ticket is high, often making taxi a more cost-effective alternative for group travel**

- Very convenient way of travel across Newcastle (ring route around the city)
- Low accessibility due to limited stations. Felt to be run down and unsafe (lack of lighting /staff /shelter) which for some discourages use during evenings
- Ticket types felt to be expensive, and often complicated & difficult to work out 'correct' type needed in relation to zone(s) travelling in

- Very accessible way of travelling directly into the city centre of Newcastle. Ticket prices felt to be bad value for money; cannot use across bus providers or buy group tickets e.g. for family, meaning taxi often proves to be a more cost effective option for city centre journeys

- Good option to get from one side of the city to the other very quickly. However, cost of a ticket is felt to be expensive, especially when compared to other modes available (bus ticket is felt to cost half the price, to cover a similar distance)

- Mainly used for enjoyment (pleasant river journey / bikes & dogs allowed on board). Many would like to use it more but having to buy a separate ticket for travel which is incompatible with other PT in the area is a deterrent for some

Local issues: Hull

- **Hull: Modes of public transport available limited to buses and trains. Bus services are operated by two different companies (East Yorkshire, Stage Coach), which is a key frustration for passengers when it comes to purchasing tickets. Bus stops felt to be lacking in information on timetables and next buses, making planning of journeys at bus stops/en-route difficult for some**

- Good coverage across Hull – various routes that go both central and to housing estates
- MegaRider (weekly) / Day Rider bus tickets available which are popular and felt to be good value for money (when only needing to use a single bus service provider)
- Incompatibility of different bus company tickets on buses leads to arguments between passengers and drivers and a feeling of bad customer service/bad value for money
- Incompatibility of different bus company tickets also forces some passengers to take longer journeys due to having to wait for correct bus / not being able change route for quicker/more direct journey

- Hull Trains felt to provide good level of customer service (free WiFi, polite members of staff) and a quick / convenient way to visit nearby towns and cities e.g. Scarborough / York
- Hull train station felt to be easily accessible and well laid out, ensuring ease of finding correct platform for journey upon entering the station

Local issues: Leeds

- **Leeds: Bus is the dominant mode in Leeds. Overall transport in Leeds is seen as inconsistent and disjointed; parts of the city seem better served than others and there is considerable variability in terms of service experience. Metro card is seen as a good product, but too expensive if not a 5-day a week commuter.**

- Bus service provision is seen as area dependent and as such, very good in parts of the city, with plentiful services and segregated lanes, but much worse elsewhere and with different operators offering quite different services. Some improvements in recent years including free WiFi
- Services also not particularly cheap, compared with taxis and parking when travelling in a group

- Trains also variable, with some improved services (new rolling stock) but others still quite poor. Congestion also an issue. Train ticketing is problematic, with insufficient ticket machines and problems with fare collection on trains (and with revenue protection policies)

Local issues: Sheffield

- **Sheffield: Tram is the preferred mode of transport for local travel, rather than bus. This is driven by perceptions of greater reliability and a more pleasant journey experience. Many often walking/driving to tram stations when a bus stop is nearer. Limited awareness and usage of the Travelmaster smartcard. Some using All Day Rider tickets, but the fact this is restricted to Stagecoach can deter broader uptake.**

- Fast, reliable, direct and convenient way to travel
- Considered accessible and pleasant in terms of station and on board, particularly driven by presence of ticket inspector
- Many default to returns or singles as lack knowledge on other types available.

- Often a second choice, or avoided, due to issues with reliability, unfriendly bus drivers and safety concerns late at night
- Ticketing felt to be stressful due to worry about needing change / drivers not wanting to take notes.
- Users often revert to return/single tickets as infrequent usage means other tickets are not considered to offer value for money
- Inconsistent pricing between Stagecoach and First an issue

- Makes other areas of the North and London easily accessible.
- If planned, tickets can offer good value for money. However, ticketing is generally considered complicated and the difference in ticket prices, depending when purchased, is a big issue

Local issues: Liverpool

- **Liverpool: Transport methods used were mainly buses for more local journeys and trains for medium and long distance journeys. Merseytravel Walrus card heard of only by a few but there was a general lack of interest in take-up (perhaps due to low understanding and awareness). Frustrations include high prices for single bus fares (taxis often better value for money) and bus services being operated by two different companies**

- Used to travel within the city and for shorter journeys to and from the suburbs and some neighboring towns
- Generally frequent services and good coverage in most areas, though a few respondents mentioned some areas which were more difficult to get to (e.g. retail park)
- Single journey tickets seen as expensive (£2.20); weekly tickets, however, seen as good value for money (£14)
- Incompatibility of two different bus company tickets on buses (Arriva and Stage Coach) also seen as a major issue for ticket purchases and use

- Trains seen as the most convenient way of travelling medium to long distances; often better than driving in order to avoid 'horrendous' traffic on the M62
- Overall, perceived as better value than buses for distances travelled (if booked in advance) and easy to plan journeys and buy tickets online

- Ferries only used occasionally and more as a 'day out' activity for families. Seen as expensive and not a practical way of getting to the other side of the River Mersey

Transport in the wider North

- The wider region is typically a second order priority
- Furthermore, views on transport beyond immediate city also reflect habit/ conditioning
- Thus attention often turns first to links with London
- Beyond this, discussion tends to focus on the near region (e.g. for Manchester, Liverpool & Leeds; for Leeds, Manchester and York)

- Again, issues tend to focus on service quality:
  - Poor rolling stock
  - Lengthy journey times
  - High costs

- Discussion of ticketing centres on **fares**
- While passengers generally accept the idea of variable pricing in principle, many feel that in practice it is opaque and arbitrary
  - Large price differences between seemingly very similar journeys
  - Difficult to know how to achieved the optimum price
  - Suspicion that the process is manipulated by operators to the customer's detriment

"If I go to London that's like two hours 20 minutes - great but then I can go to Nottingham, anywhere like as far as that and it takes me two hours." (Leeds, Business)

"It takes too long to get to Manchester, you can drive to Manchester much quicker, it stops at every stop. It takes a long time and it's over-priced." (Leeds, Business)

"Also, which really annoys me, is the pricing structure itself about the advanced and the not advanced and the off-peak and the peak and they've just changed the rules on that and which route you can go and until you want to die and I spend a lot of time on trains and I never know whether I've got the right ticket." (Leeds, Leisure)

Illuminas

Ticketing

Ticketing tends to be a second order issue, but when prompted passengers do identify limitations to current approaches

- The approach to ticketing has usually been established by process of ‘trial & error’ and habituation
- There is no sense of there being any overarching ticketing or fare architecture
  - Indeed, many point to examples of anomalous or seemingly perverse fare structures

- Key issues include:
- Lack of inter-operability (within or between modes)
- Limited awareness of multi-modal or city-wide schemes
  - Such schemes are often seen as expensive and restrictive for anything other than 5-day a week commuters
- Inconvenience and hassle of administration e.g.
  - Cash payments on buses
  - Ticket machines (queues etc.)
  - Revenue collection problems
  - Needing to visit travel centers to buy certain products
- Awareness of new city-wide ticketing scheme variable

“I think it’s shocking now when you get on a bus with a £10 pound note, bearing in mind your fare is probably £3.80 and the bus driver won’t take a tenner.” (Leeds, Business)

- Passengers are to a greater or lesser extent conditioned to existing approaches to ticketing
  - It is seen as problematic, but is not typically the first issue raised
- That said, *once prompted*, passengers readily make unfavorable comparison between their own city and London / Oyster
- Other examples of potential improvement are drawn from foreign cities and airline ticketing

“It doesn’t feel coordinated - not compared to London where you just get an Oyster card and you can use it on everything.” (Manchester, Commuter)

Ticketing: unsurprisingly, advance purchase correlates with longer term season ticket use for commuters; business journeys are mostly planned journeys and as such, tickets are bought in advance

Q6a/Q6b What ticket(s) do you use when you travel...?(%)
Q28/Q29a What ticket(s) do you use when you travel...?(%)

Commuter

Ticket type	%	How purchased / %	
		In advance	On the day
Single	16	25	75
Return	35	25	65
Day ticket travel card	19	21	88
Annual season ticket	12	79	21
Monthly season ticket	17	70	31
Weekly season ticket	12	37	63

Business

Ticket type	%	How purchased / %	
		In advance	On the day
Single	11	82	18
Return	63	75	25
Day ticket travel card	26	38	62
Single	11	82	18
Monthly season ticket	6	67	33
Weekly season ticket	6	67	33
Annual season ticket	2	50	50

77% purchase their tickets themselves
23% typically have someone purchase their tickets

Base: For work / college / university (n=239); For longer trips for business / work / study (n=118)

Ticketing: unsurprisingly, short leisure users purchase on the day, whilst long distance leisure journeys are mostly planned and as such, tickets are bought in advance

Q15a/Q16 What ticket(s) do you use when you travel...?(%)
Q38/Q39 What ticket (s) do you use when you travel...? (%)

Short leisure only

Ticket type	%	How purchased / %	
		In advance	On the day
Single	36	0	100
Return	48	0	100
Day ticket travel card	28	6	94
Concessionary card	10	21	79

81% of **commuters also make short leisure journeys**, use the same ticket for both journey types.

Of this 81%:
13% use a annual season ticket
17% use a monthly season ticket
11% use a weekly season ticket

Amongst the 19% that use different ticket types for short leisure , the main reasons are infrequency of such trips and different modes used for short leisure journeys

Base: those who use public transport to commute and make short leisure journeys (168)

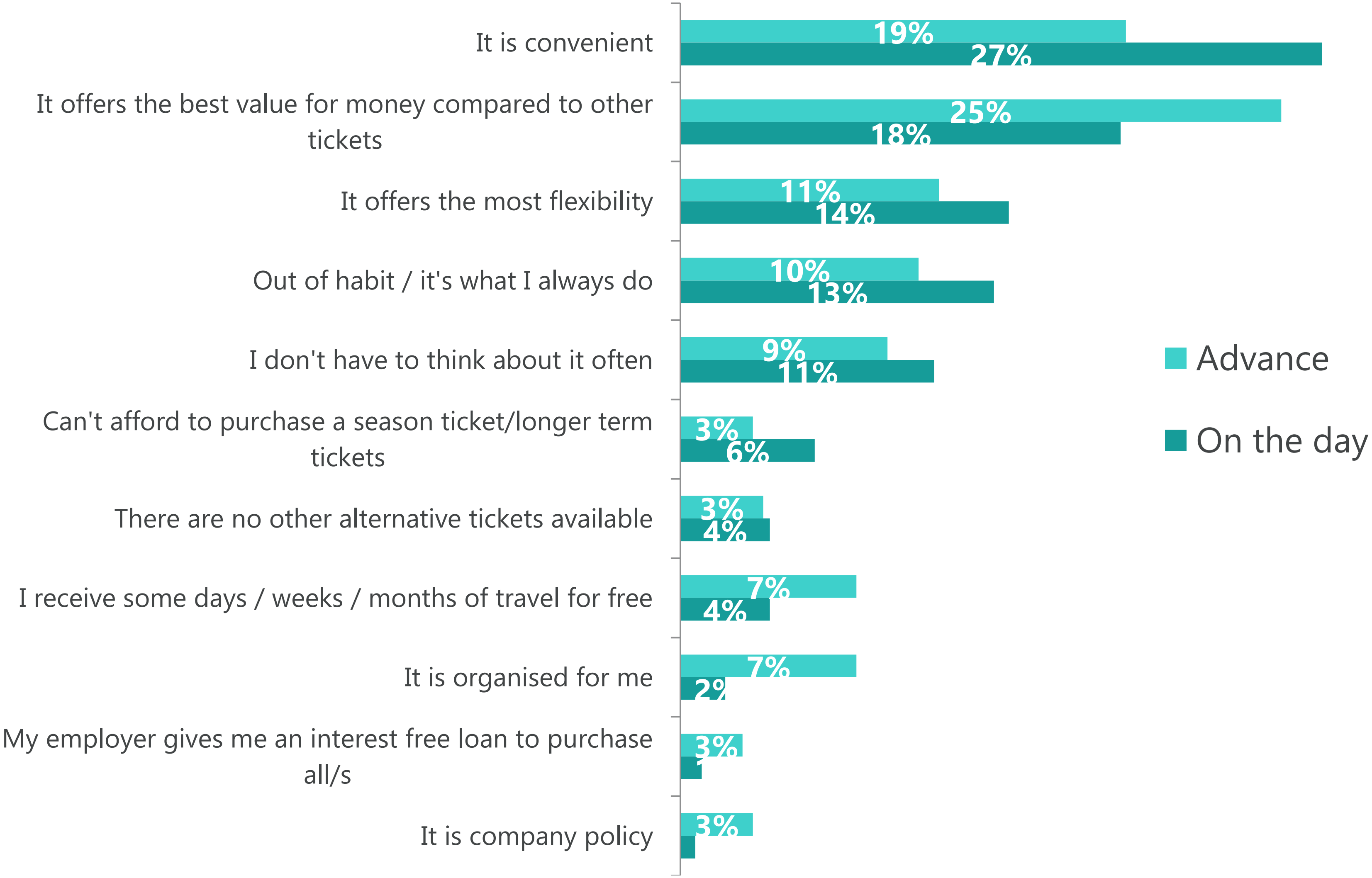
Longer leisure

Ticket type	%	How purchased / %		
		In advance	On the day	Other
Return	68	74	24	2
Day ticket travel card	15	32	68	-
Single	10	89	11	-
Monthly season ticket	3	60	40	-
Weekly season ticket	3	40	60	-
Annual season ticket	4	38	72	-
Concessionary card	6	58	8	33

Base: For short leisure (n=241); For long distance leisure (n=188)

On the day purchasing is mostly about convenience, but also flexibility and habit, whereas advance is about value

Q7b / Q17b / Q30b / Q40b. What is the main reason you purchase this ticket?



Base: all public transport users (n=297)

Satisfaction with ticketing currently is high

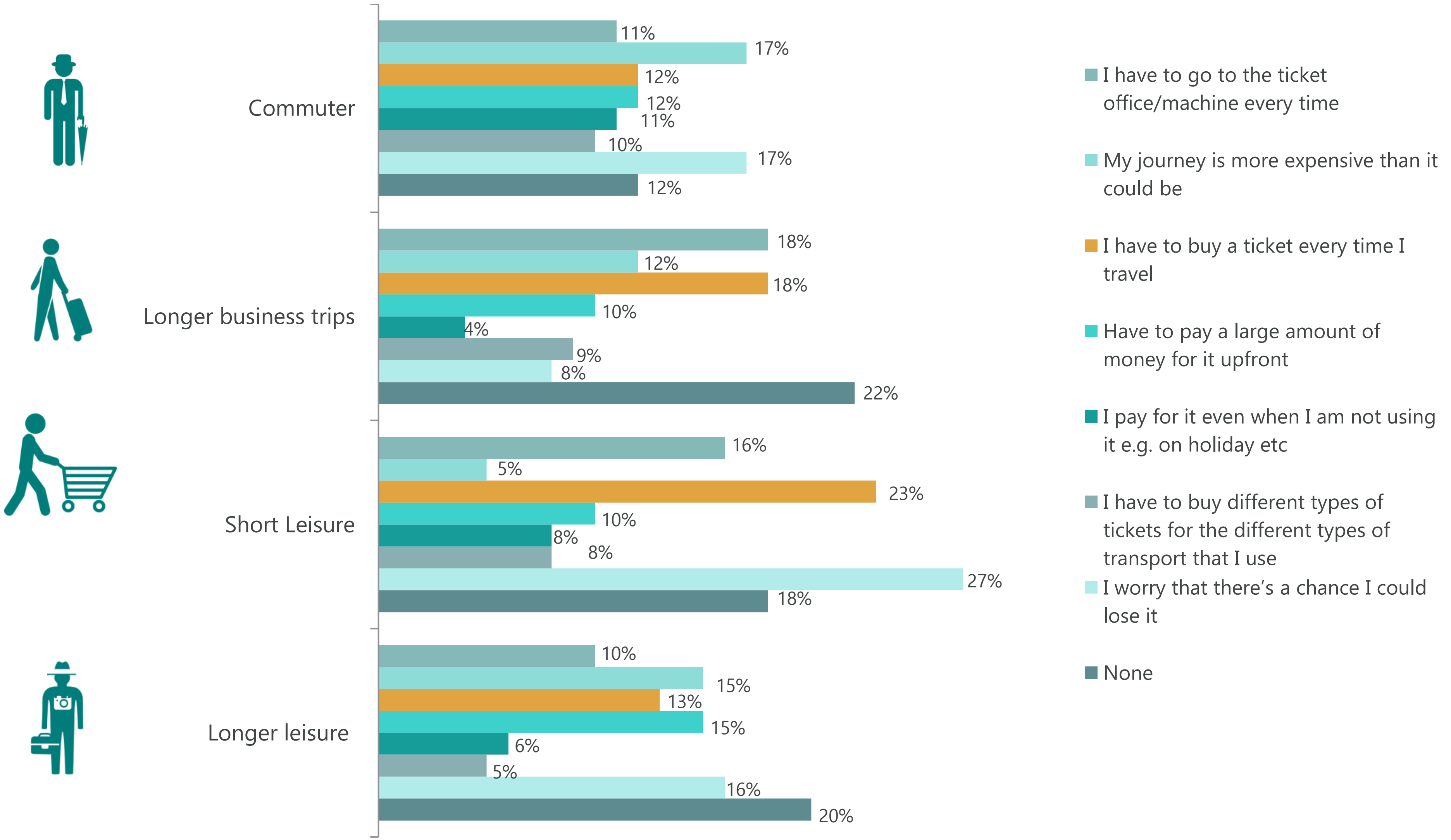
Q8b/Q19/Q31b/Q41b. How satisfied are you overall, with the ticket(s) you purchase to travel?...(%)
Q8a/Q18/Q31a/Q41a. How satisfied are you with the following elements of the ticket(s) you purchase, to travel for the following reasons?...**(Top 2 Box %)**

	Overall satisfaction	The flexibility it offers in terms of routes, times and days	The value for money compared to other tickets available	How you purchase the ticket e.g. at the station online	How the ticket is administered to you and how you use it e.g. the format the ticket takes
	**81%**	81%	71%	81%	84%
	**95%**	86%	83%	100%	89%
	**81%**	74%	71%	75%	83%
	**86%**	81%	80%	88%	87%

Base: For work/college /university (239); Business (118), Short leisure (241); Longer trips for business/work/study (n=118); Longer trips for leisure (188)

When prompted, some limitations are identified

Q8c/Q20a/Q31c/Q41c. What, if any, are the drawbacks of purchasing the ticket(s) you need to travel?...(%)

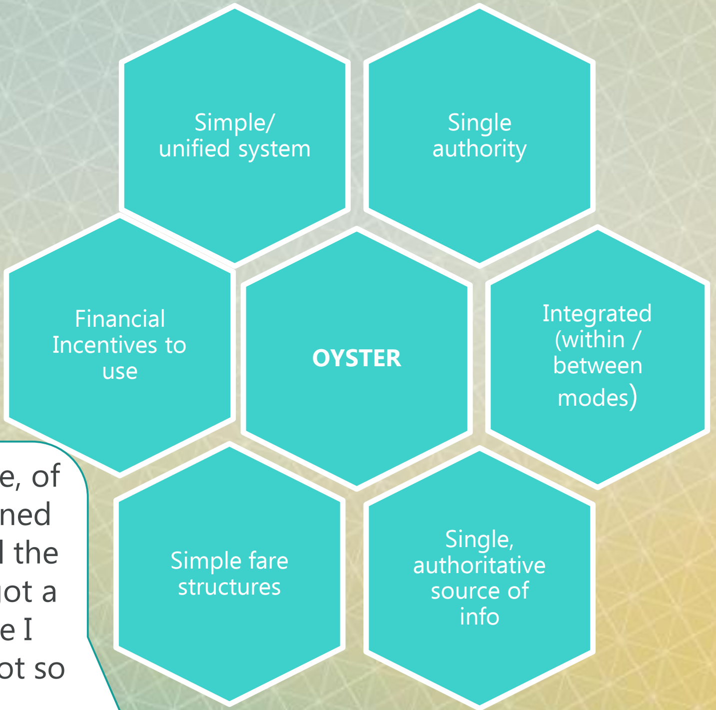


Base: For work/college /university (239); Business (118), Short leisure (159); Longer trips for leisure (188)

Notwithstanding apparent high levels of satisfaction with ticketing currently, passengers are very open to alternatives

- Oyster viewed as the 'Holy Grail' of travel products, by passengers outside of London
- Almost everyone is is familiar with Oyster (and many people seem to have used one)
    - Oyster addresses key issues of:
        - Interoperable / multi-modal
        - Flexibility (multiple products, 'best value' proposition)
        - Convenient administration (although some would like the option of options other than Smart such as contactless, NFC etc.)
        - Again, thinking tends to be local and city based rather than wider region

- However, it is recognised that Oyster's success is premised on much more than the mechanics of ticketing
    - Unitary political structure and a perceived single provider enables an integrated transport system
    - This in turn facilitates a more rational and streamlined approach to fares
    - And in this context the real advantages of Smart ticketing can be realised



"I definitely think the north could learn from Transport for London and how the Oyster works and how it all links up to make it easier and I think what's sort of come from today is people have two or three buses or train and a bus to get to work and none of the systems link up, they're not the same companies, you've got to pay for the tickets, it's not particularly easy." (Leeds, Leisure)

"Because in London, you see, of course, it's generally governed by the Mayor of London, all the transport stuff, so they've got a unifying common purpose I think overriding it but I'm not so sure we've got that." (Manchester, Leisure)

Only 18% currently use Smart tickets for public transport, but over half are aware of them and 44% overall have used them at some point

Q45. Are you aware of smart ticketing as a concept to pay for travel on public transport or to store tickets on? %

Awareness

36%

56%
Rising to 71% amongst Leeds sample

Unaware / Aware

Base: all respondents (n=407)

Q46. Have you used any form of smart ticketing before either in the UK or abroad when travelling on public transport? %

Usage

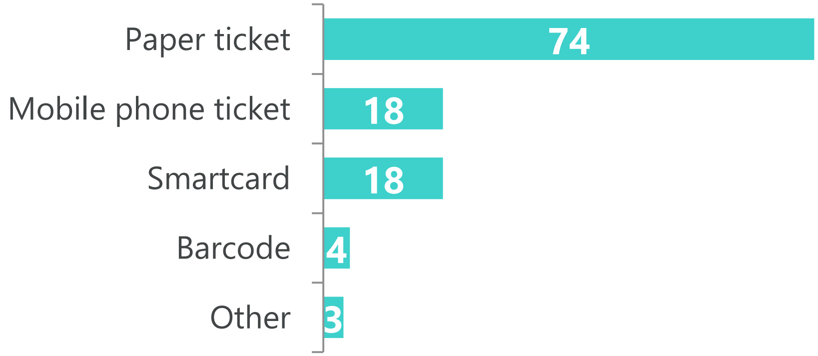
54%

44%
Rising to 73% amongst Leeds sample

No / Yes

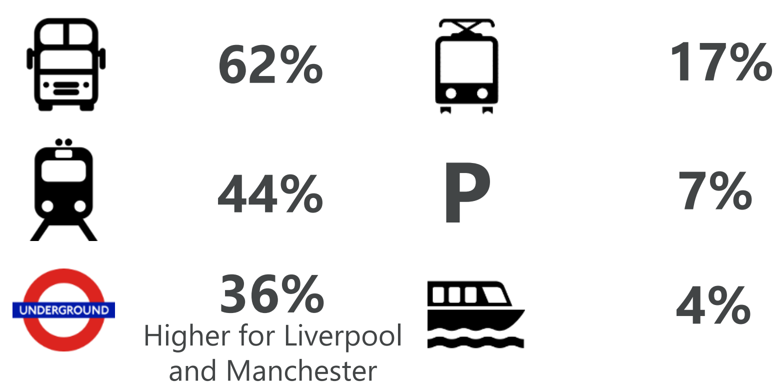
Base: all respondents aware (n=229)

Q48. Thinking about the different types of tickets that you said you normally use when travelling on public transport, which format do these tickets take? %



Base: all respondents who use public transport (n=341)

Q47. On which types of transport have you used smart ticketing before? %



Base: all respondents who have used (n=101)

Smart ticketing is considered appealing by almost two thirds, with just 8% deeming it 'unappealing' as a concept

Q49b/c. What do you find appealing / unappealing about the idea of using smart ticketing on public transport?

If a paper ticket is lost it's impossible to prove and replace but if a smart card is lost it can be reported and any remaining credit can be transferred to another card.

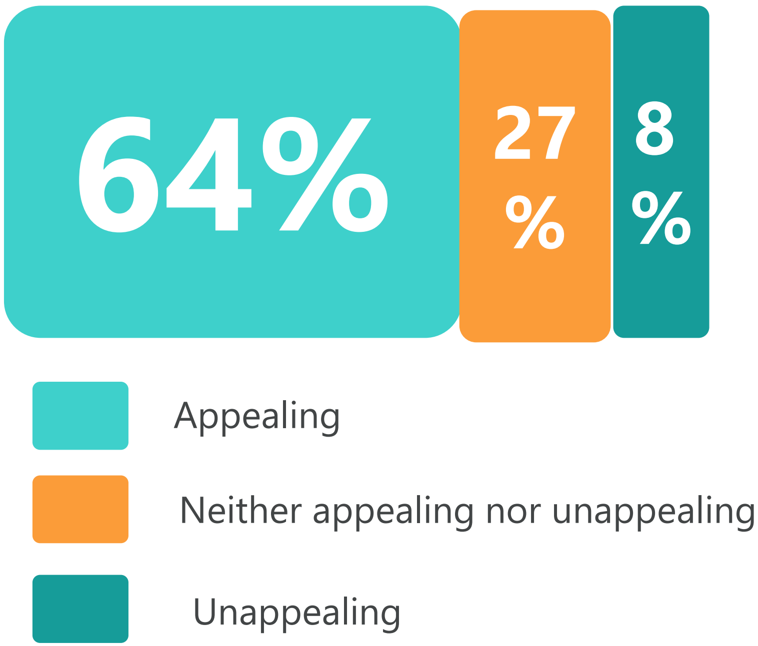
It's easy, just load your cash on and your ticket is there for the whole day, week or month

It's convenient. But I find it kind of antisocial. I like to have eye contact/ talk with a driver

I guess I would have to go to a shop to load it up, which is nowhere near the bus stops or train stations I use

Q49a. How appealing do you find the idea of using smart ticketing for travel on public transport?...(%)

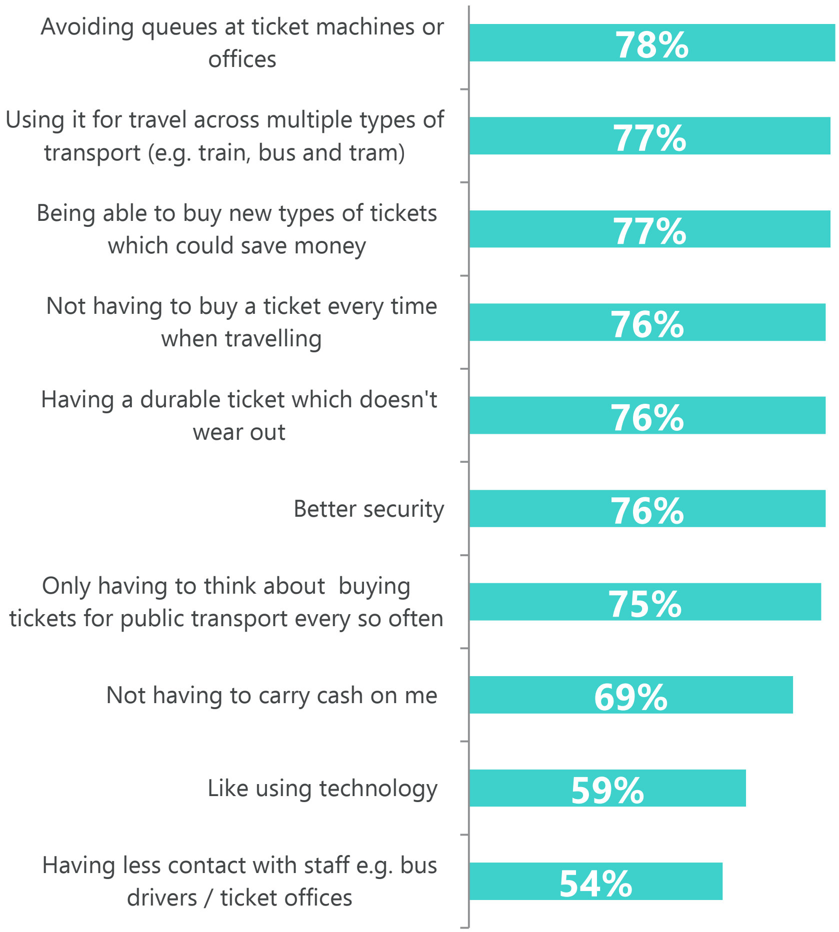
Appeal



Base: all respondents (n=407)

Potential advantages hugely outweigh drawbacks, with an average of 7 given per respondent!

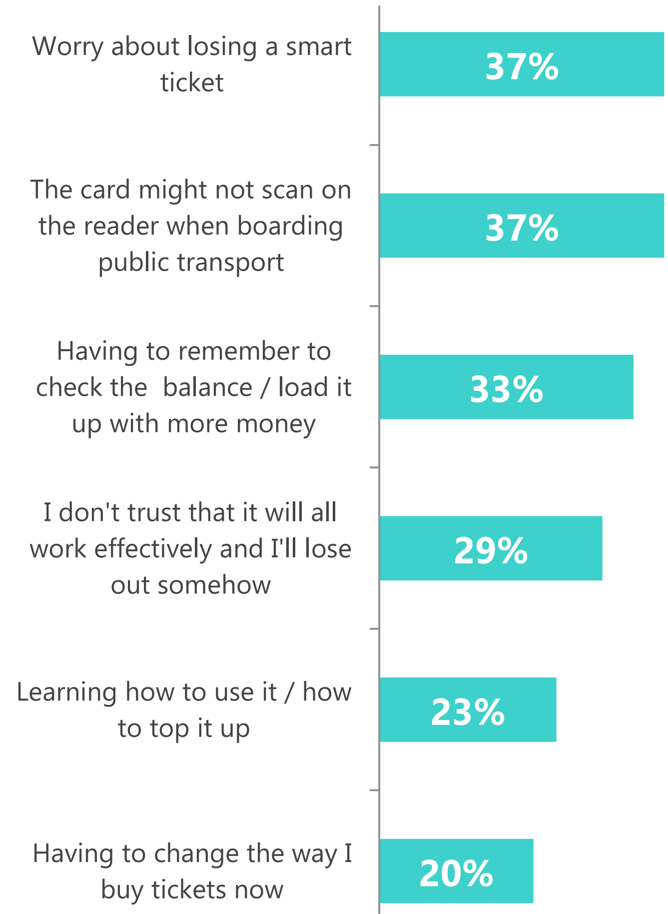
Q50. Here are some potential advantages of using smart ticketing for travel on public transport, for each of them please indicate how attractive this feature is to you personally?...(top 2 box %) (PROMPTED LIST)



Mean advantages given:

7.2

Q51. To what extent do you consider each of the following as potential drawbacks when considering using smart ticketing?...(top 2 box %) (PROMPTED LIST)



Mean concerns given:

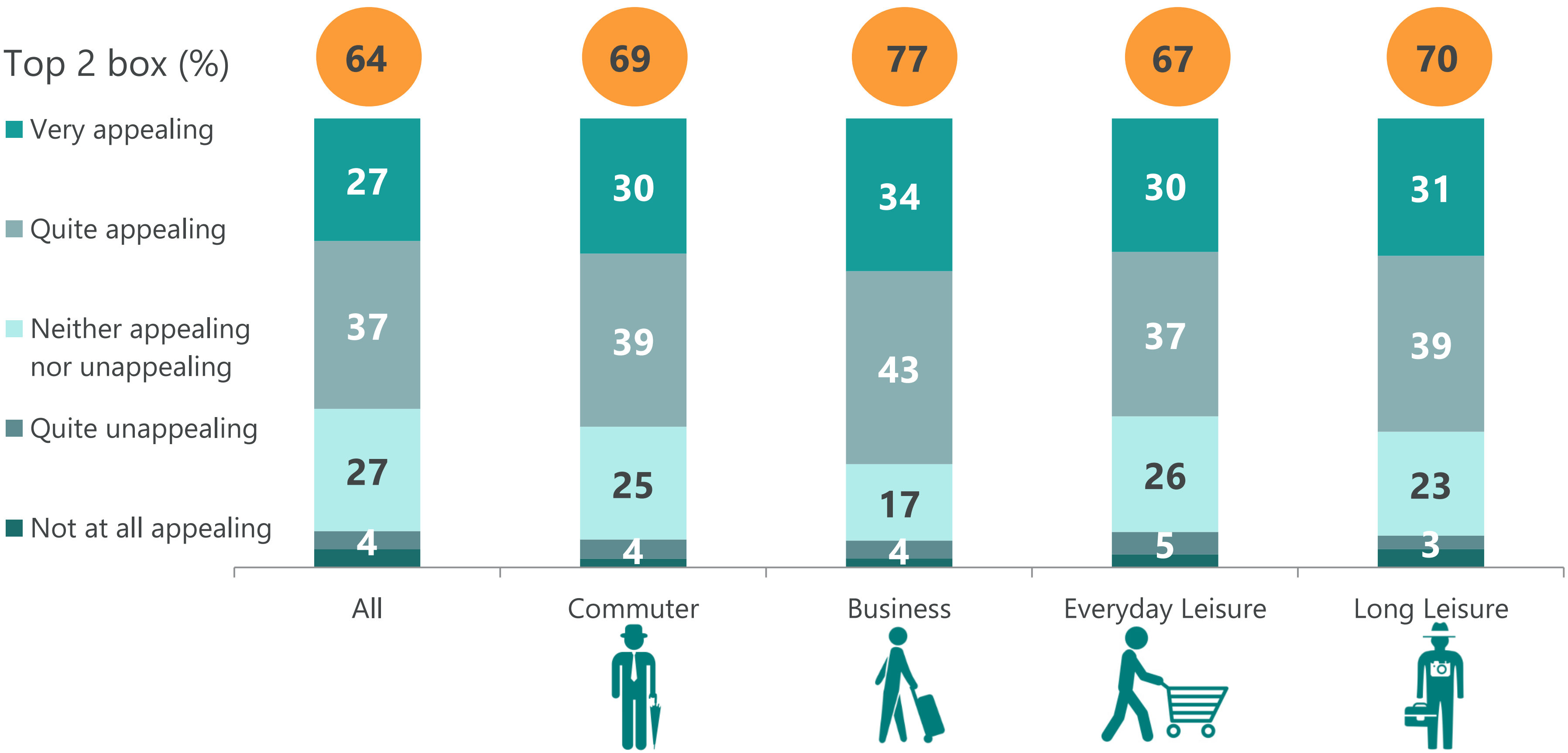
1.8

Base: all respondents (n=407)

INTERNAL

Smart ticketing is highly appealing across all groups

Q49a. How appealing do you find the idea of using smart ticketing for travel on public transport?...(%)

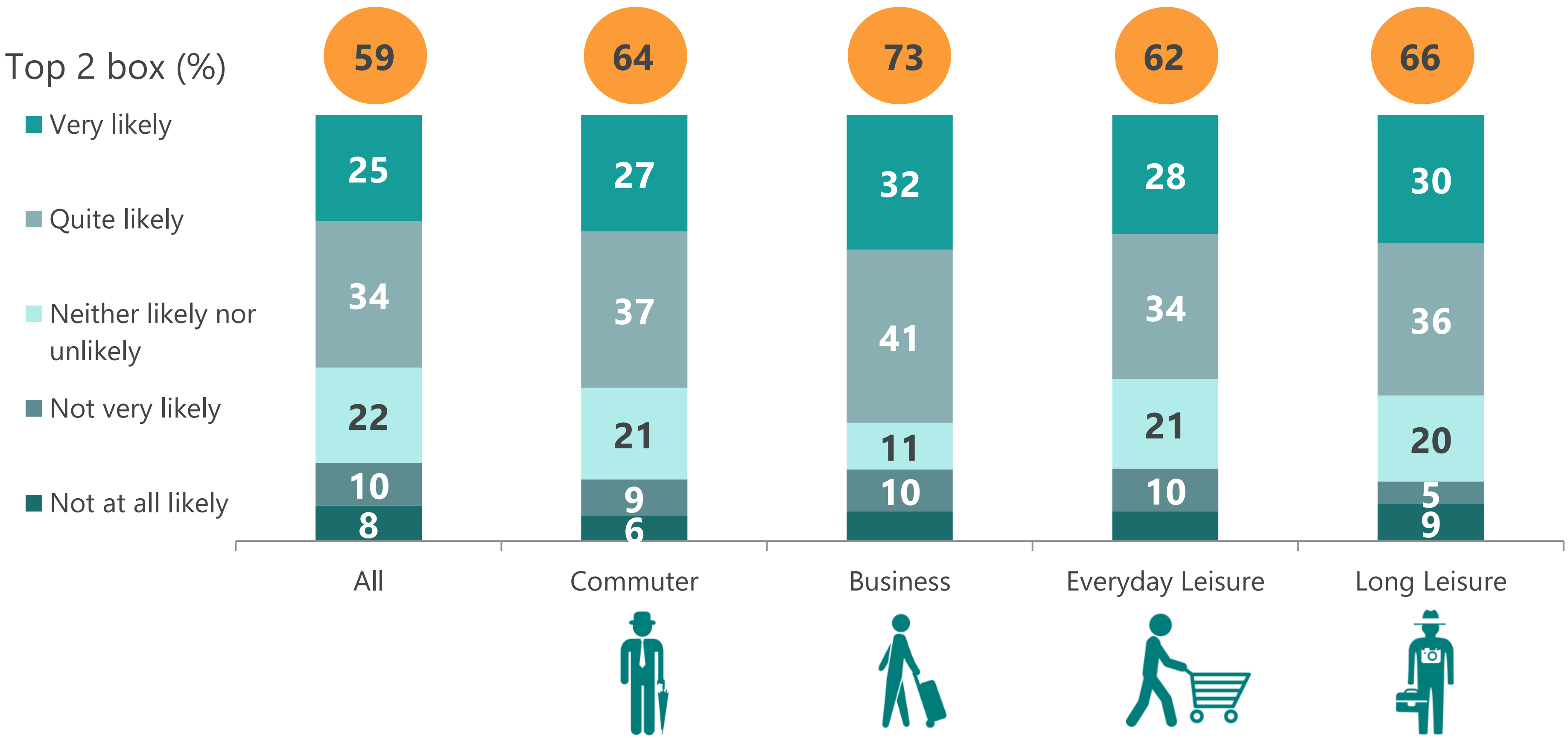


Railcard and concessionary ticket holders particularly keen on the idea of smart ticketing, along with Leeds and Manchester residents, and Newcastle less so (just 50% top 2 box). Those with existing keenness to use public transport more likely to consider the idea highly appealing

Base: all respondents (n=407)

Likelihood to use smart ticketing is high across all groups

Q52a. How likely do you think you would be to use smart ticketing on public transport?...(%)



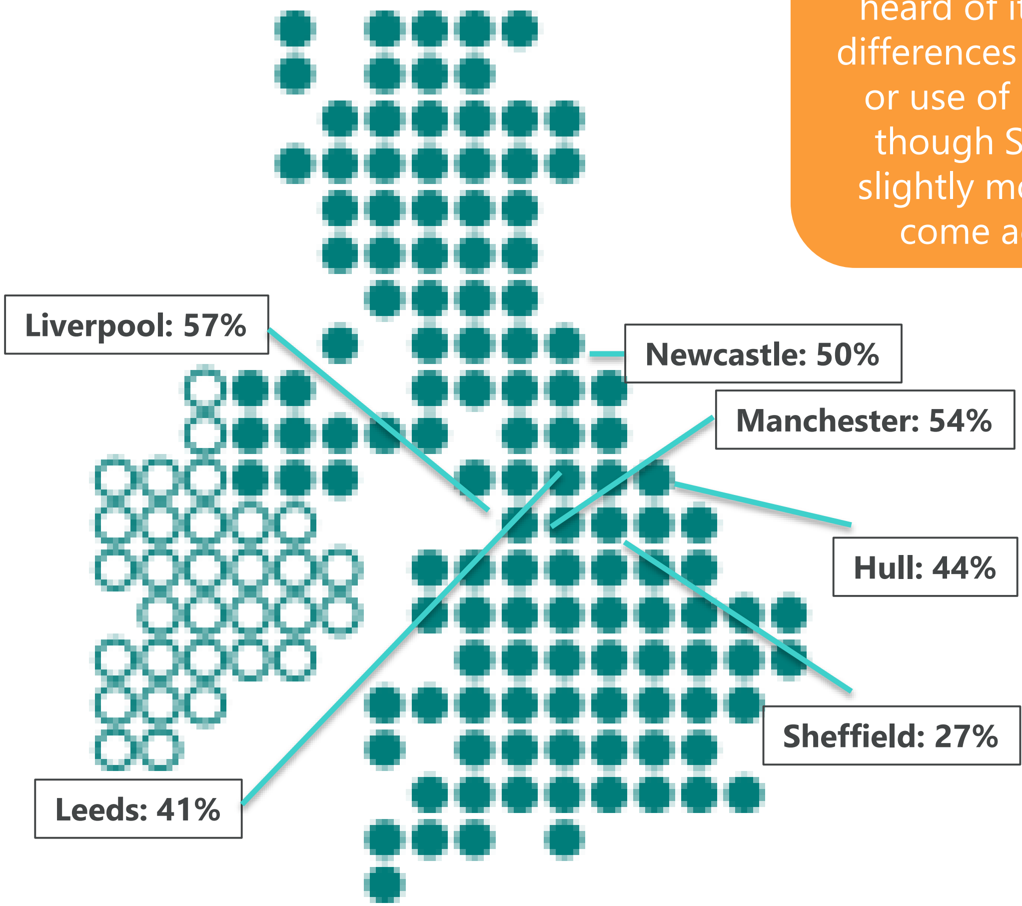
Leeds and Manchester residents again seem more likely to adopt, and Newcastle and Hull less so. Under 50's, Railcard users and those generally keen to use Public Transport more also show greater enthusiasm for adoption

Base: all who have not used smart ticketing before and those not currently using public transport (n=349)

The Northern Powerhouse

Overall, 46% had heard of the Northern Powerhouse, though this varied by region

Q55. Have you heard of the term 'Northern Powerhouse'? %



Those aged over 40 and males more likely to have heard of it than others. No differences by working status or use of public transport, though Social Grade A/B slightly more likely to have come across the term

Base: all respondents (n=407)

Understanding of the Northern Powerhouse is patchy and confused

- Very few respondents able to give a coherent explanation of the Northern Powerhouse concept
  - A sizeable minority are entirely oblivious
- Than said, many have picked up 'bits & pieces,' although transport is often only a marginal feature of these ideas
- Where transport does feature, there is considerable confusion with HS2
  - NB fieldwork took place just after announcement re. timing of HS2 Crewe extension

"Well it's the proposed transfer of power to sort of local places running services for the community, within the town halls in all the social services and stuff like that, in a nutshell. I mean we sort of run it. We have a mayor and we run it." (Sheffield, Leisure)

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

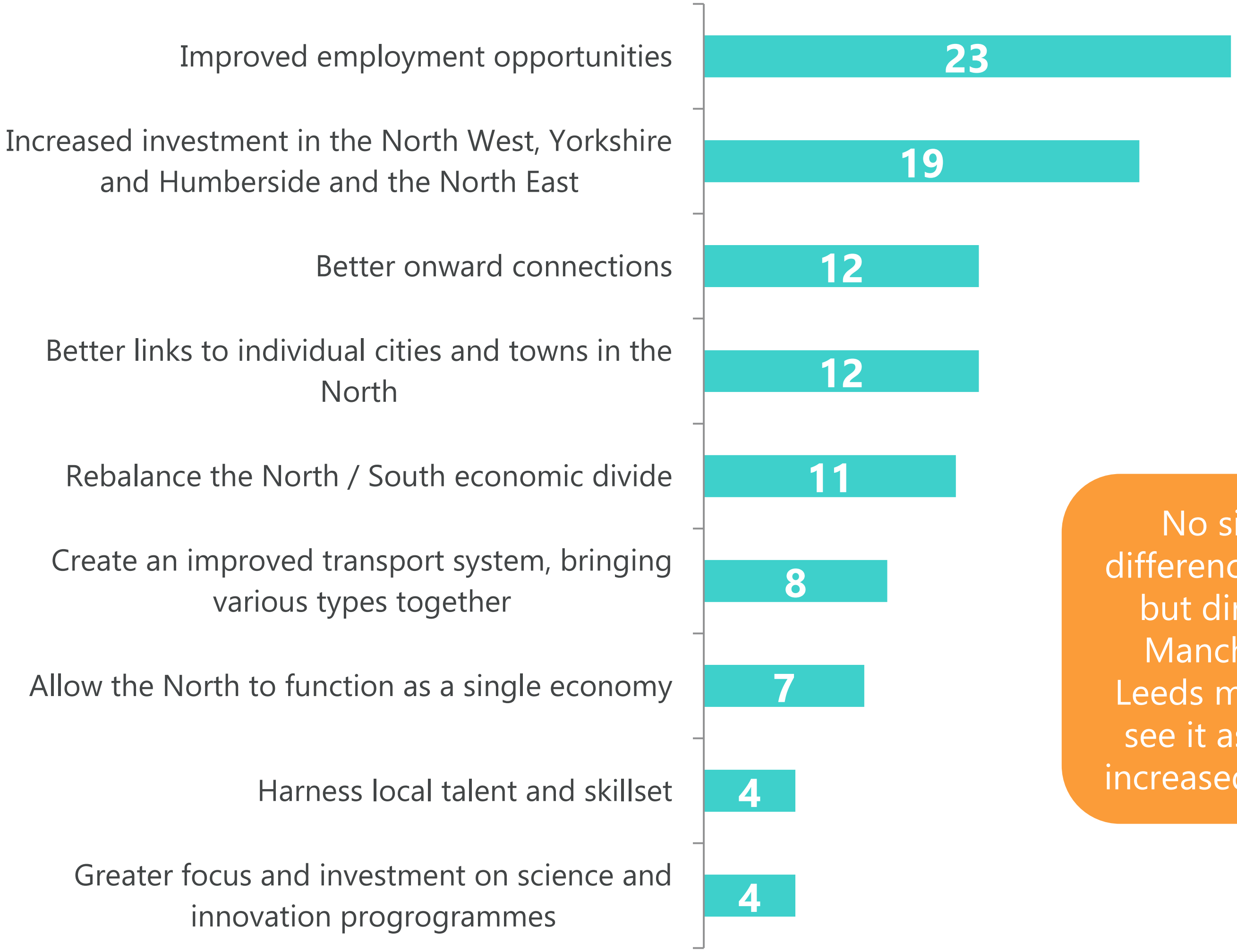
"It's like what I said about George Osborne before. It's the major cities of the north, together, so Leeds, Manchester, Liverpool, you know, creating them as like major super cities, something like that, where we're able to control ourselves, and I think they want to electrify the train lines between each one, as well...just linking them all together, and making sure that we're all working together, so transport links, everything else." (Manchester, Leisure)

"In terms of travel, HS2 I suppose." (Manchester, Leisure)

"I've seen political stuff on TV...It's a bit of a con...it's sort of massaging you a bit to accept that new train line." (Manchester, Leisure)

Economic gains are the key expectations, especially in terms of employment opportunities and investment in the region

Q57. What do you think might change as a result of the Northern Powerhouse?...(%) (PROMPTED LIST)



No significant differences by region but directionally, Manchester and Leeds most likely to see it as triggering increased investment

Base: all respondents (n=407)

Northern Powerhouse: with explanation, the concept is well-received, but questions remain about execution

- At a conceptual level, the Northern Powerhouse concept is hard to argue with
  - An over due rebalancing of the national economy
  - Recognition of the size and importance of the population of the North
  - Needed investment in what is seen as a creaking infrastructure
- There is inevitably some cynicism
  - 'Political gimmick'
  - Where will the money come from?
- Perceptions of the concept as being by and for the North, rather than simply a top-down central government initiative help to overcome some suspicion

"It's coming out of the Dark Ages and actually really taking the London example and building on that to link up a large area and I think really I can't believe it's taking this long but either for political reasons or whatever, it just seems finally something's being done but it's taking a long time."
(Sheffield, Business)

"It would take you an hour to get from Shadwell into Leeds yet suddenly you could be getting the train to Manchester in 25 minutes. You'd be thinking, 'What's going on? It's ridiculous! Why is the local system still bad?'"
(Leeds, Leisure)

- However, major questions remain:
  - Will it provide affordable (not just technically better) transport?
  - What is the balance in terms of building up local, city infrastructure as well as connecting cities to one another?
  - What are the political and commercial incentives / penalties to make it work?

Northern Powerhouse: what will be the impact on behaviour?

- Respondents often find it difficult to anticipate their future behaviours, finding it easier to focus on the here (*my city*) and now (*fixing things that are wrong*)
- That said, many agree that current approaches to transport, fares, ticketing and information inhibit journeys – making them more complex, less certain and more expensive than they otherwise might be
- However, relatively few make the connection from this to envisaging new paradigms of work, leisure, business etc.

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

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

Conclusions

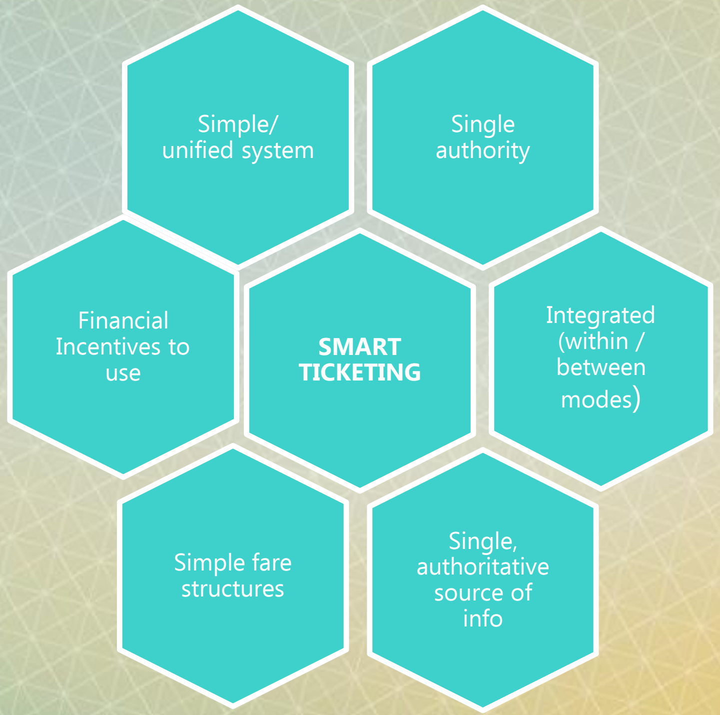
Transport in the North works, but could work much better

- Transport in the cities of North is seen as improving, but as still lagging behind best in class seen elsewhere (London and abroad)
- Local transport is frequently seen as inconsistent, uncoordinated and difficult to navigate, perceptually as much as physically
    - That said, desired improvements are often more latent than explicit
- Local issues (i.e. city-specific) as regards transport are top of mind and tend to focus on fixing what is wrong in the 'here and now'
- Although the issues identified at the city level and are seen as magnified at the regional level, people find it harder to envisage new region-wide transport solutions
- And most struggle to imagine how improvements at the regional level would/ could change their behaviours

Smart ticketing is part of the solution (but only part)

- Smart ticketing is seen as a key (indeed, overdue) enhancement to local transport
- But demand for Smart is *implicit rather than explicit*
    - Passengers are largely conditioned to current ticketing processes
- Oyster is the obvious paradigm for smart ticketing – almost universally known and experienced and perceived to be 'tried & tested'

- In part because of the experience of Oyster, there is a tendency to default to the idea of a smart card in terms of delivery. However, other approaches could be equally acceptable (and may be preferred by some) provided they can deliver key desired outcomes in terms of:
    - Interoperability (by mode and operator)
    - Best value 'price promise'
    - Secure (against loss/ theft)
    - Convenience (in terms of purchase and operation)
- However, of itself, smart ticketing is seen as a necessary but not sufficient condition for successfully addressing public transport challenges
- Successfully exploiting smart ticketing implies significant changes in a much wider transport eco-system



The North exists as a concept; better transport can help make the concept more tangible

- The idea of 'the North' (and what constitutes the North geographically) exists for most people, but is centred primarily on culture and identity rather than any perception of an economic or political unit

- The Northern Powerhouse concept, while only partially known and imperfectly understood, is broadly welcomed (notwithstanding some cynicism) as an overdue rebalancing of the national economy

- However, respondents identify a range of obstacles to developing a more concrete notion of the region and delivering the Northern Powerhouse idea. These issues include, but are not limited to, the proximate issue of transport
  - Thus, while it is clear that physical distance in the North is magnified by temporal and perceptual distance (because of poor transport links) tackling this issue will also require addressing wider challenges:
    - The North is dispersed, lacking a central core (physically)
    - Local government is also fragmented
    - This overall lack of connectedness is underlined (until now?) by an absence of any pan-Northern vision

- In developing the Northern Powerhouse narrative a clear rationale for how these barriers will be addressed will need to be developed

Next steps

- The research provides strong support for TfN's raison d'etre and the potential (and need) for Smart ticketing as part of this
- However, while there are clearly high levels of conceptual buy-in, we have more limited feedback to support scheme execution. As such further work will be needed to understand:
  - City level variation
  - Greater detail by sub group (journey type, how modes combine, impact of journey length and variability within this)
  - Deeper understanding in the choice mechanics (ticket, mode)
  - Branding (and sub-branding?)
  - Delivery mechanism(s)
  - Scheme economics and pricing