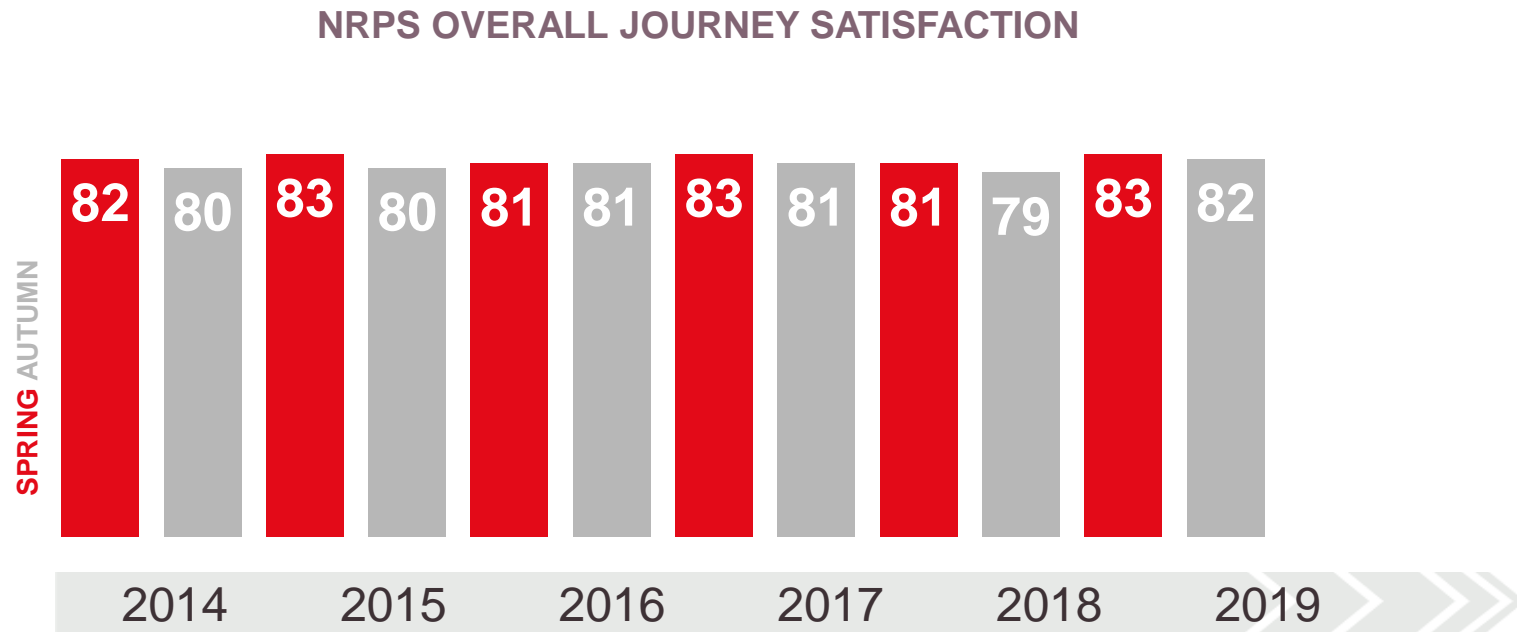




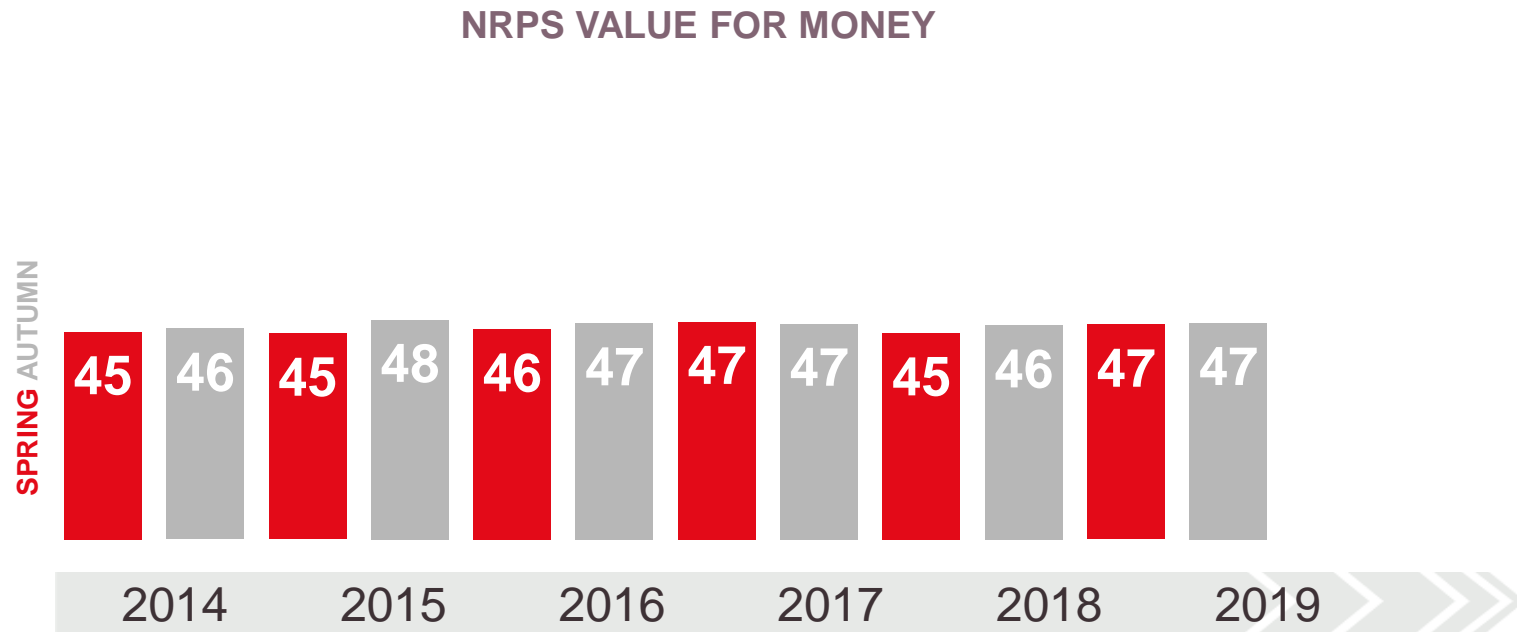
# The Passenger View

January 2020

# A first look - NRPS Autumn 2019 results released today

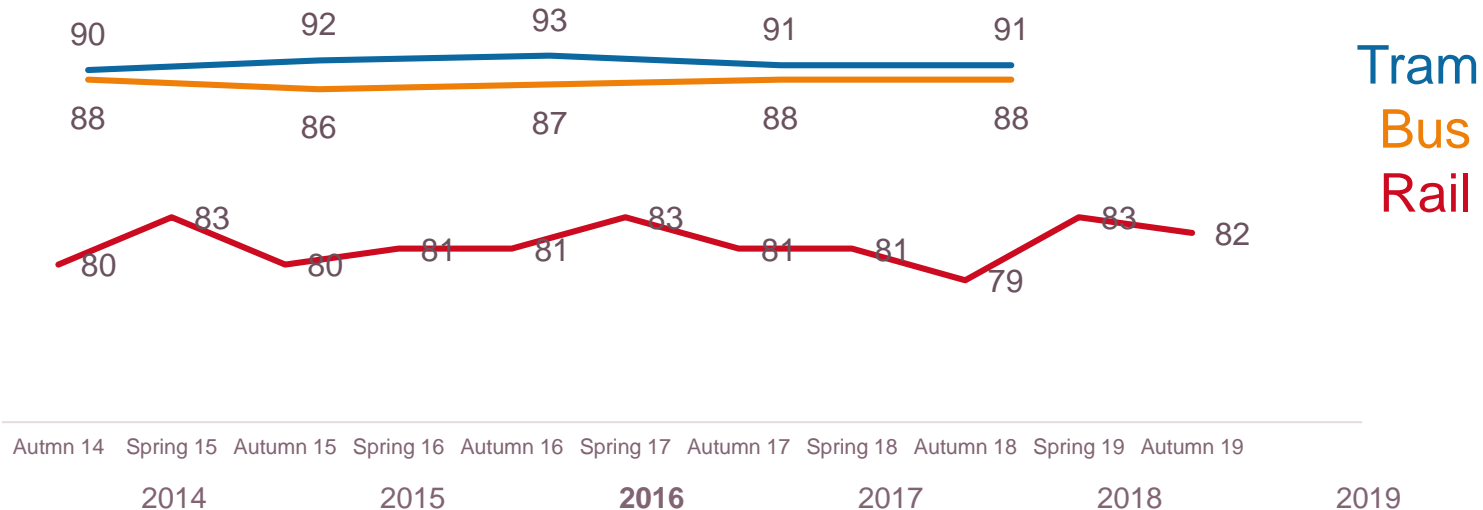


# A first look - NRPS Autumn 2019 results released today

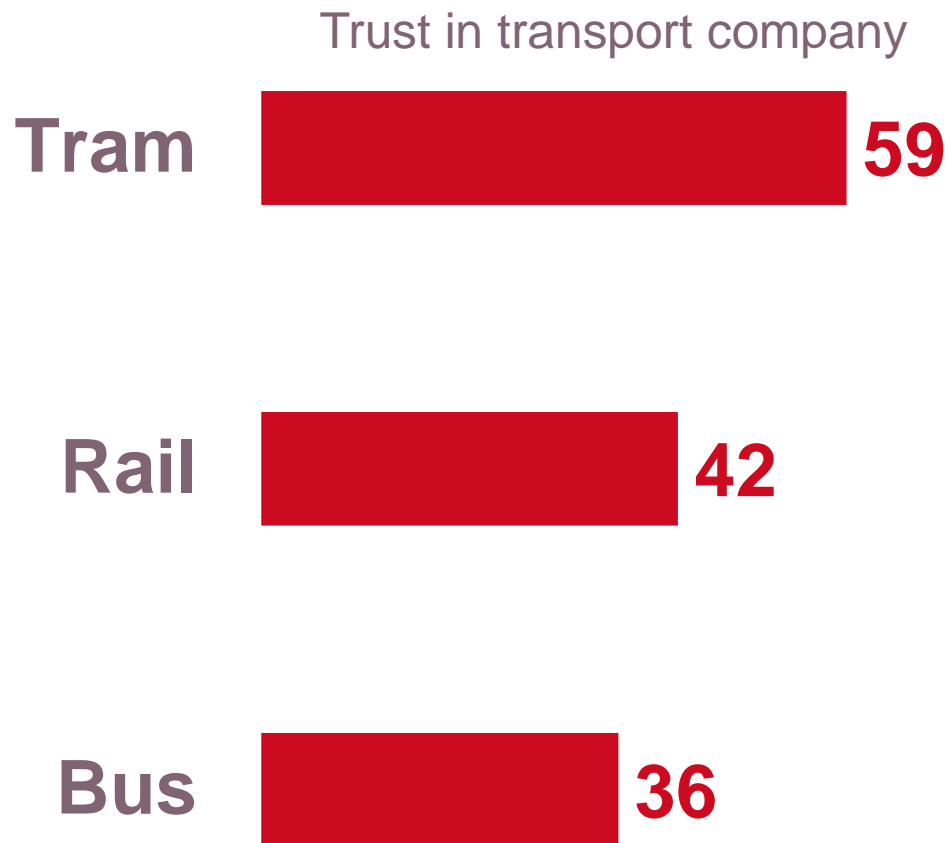


# Satisfaction among users appears high across modes but is it enough to encourage more use?

OVERALL JOURNEY SATISFACTION ACROSS MODES



# Trust is an issue – if I don't trust one mode...doesn't encourage multiple use



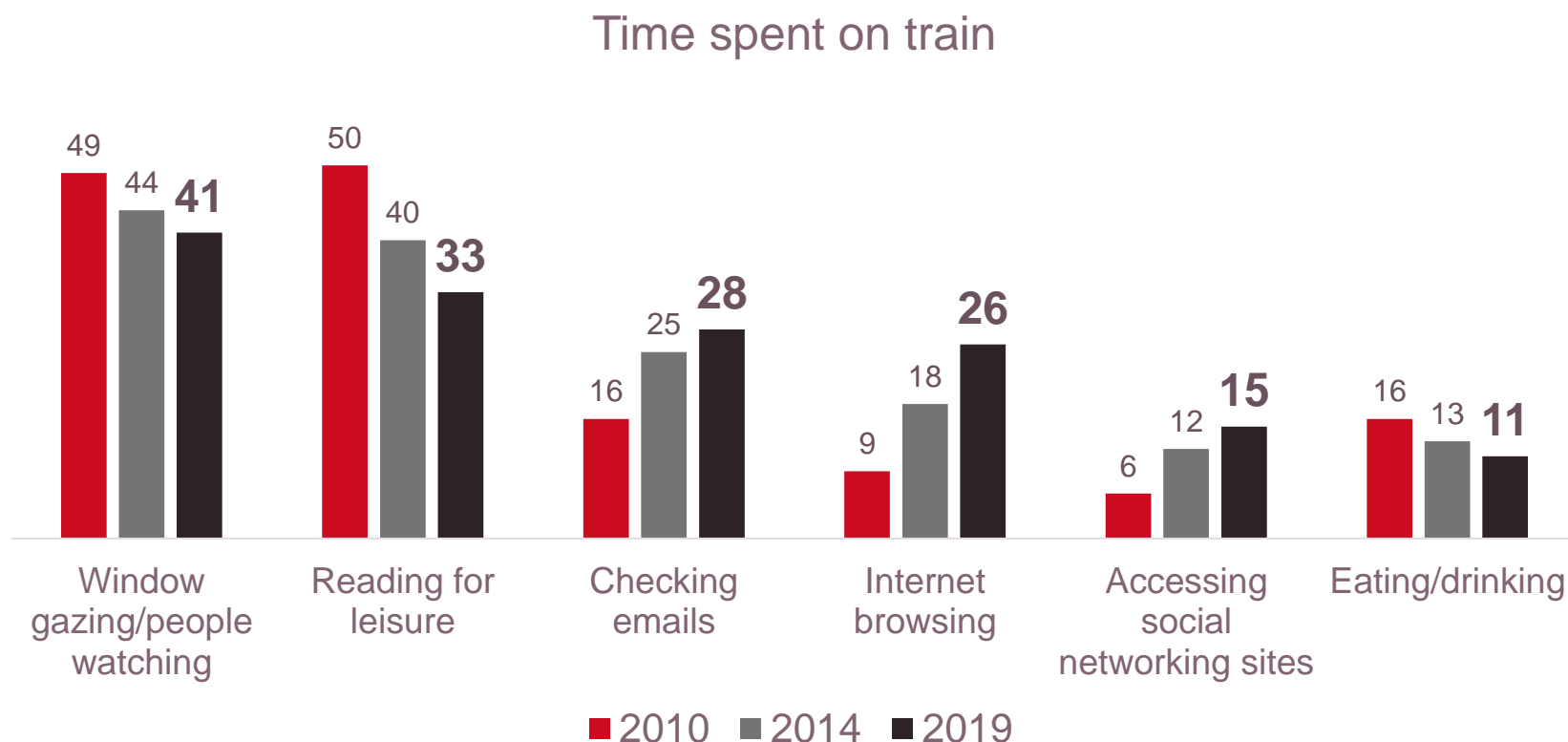
# Simpler ticketing is needed to improve passenger trust

“Make it **simpler** to buy the **best value ticket**. There are too many different options. Oyster, National Rail, Network Railcards, etc.”

“Have a **more transparent pricing system**.”

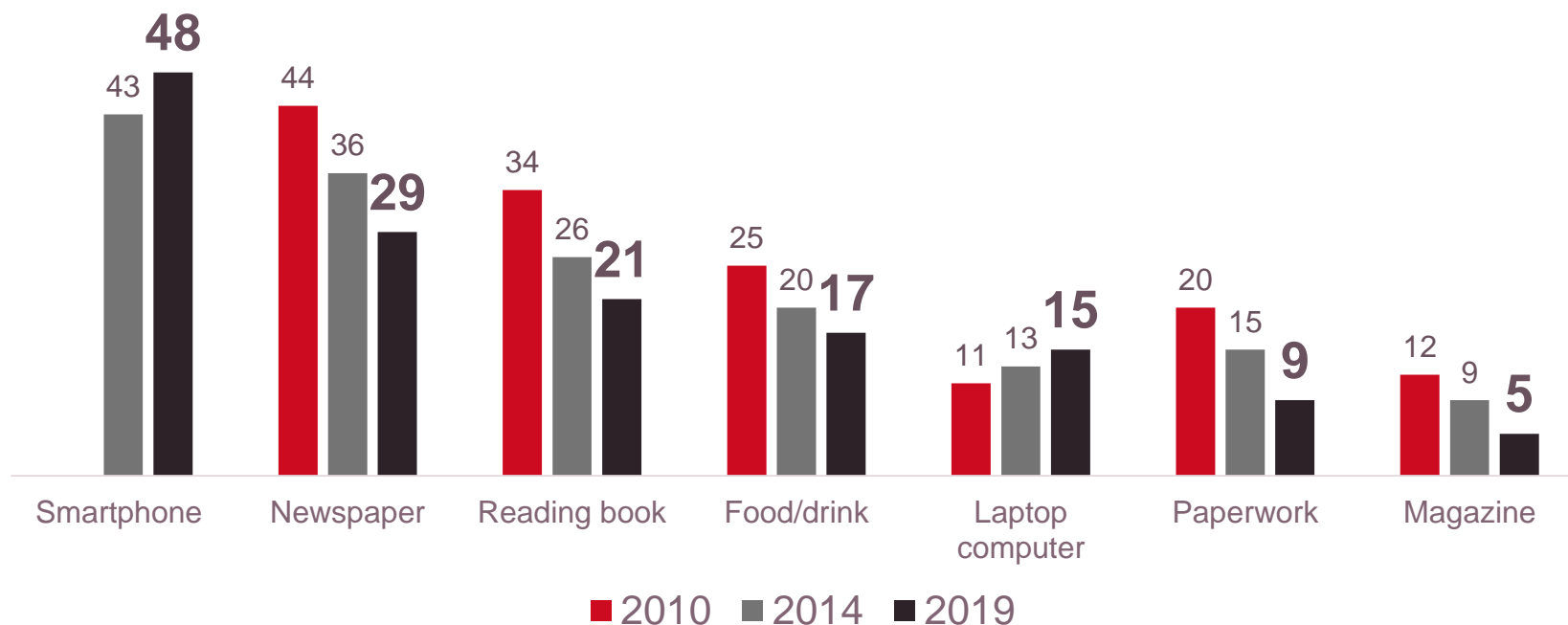
“Make ticket purchasing **easier and seamless**.”

# Passengers are increasingly more connected on train journeys



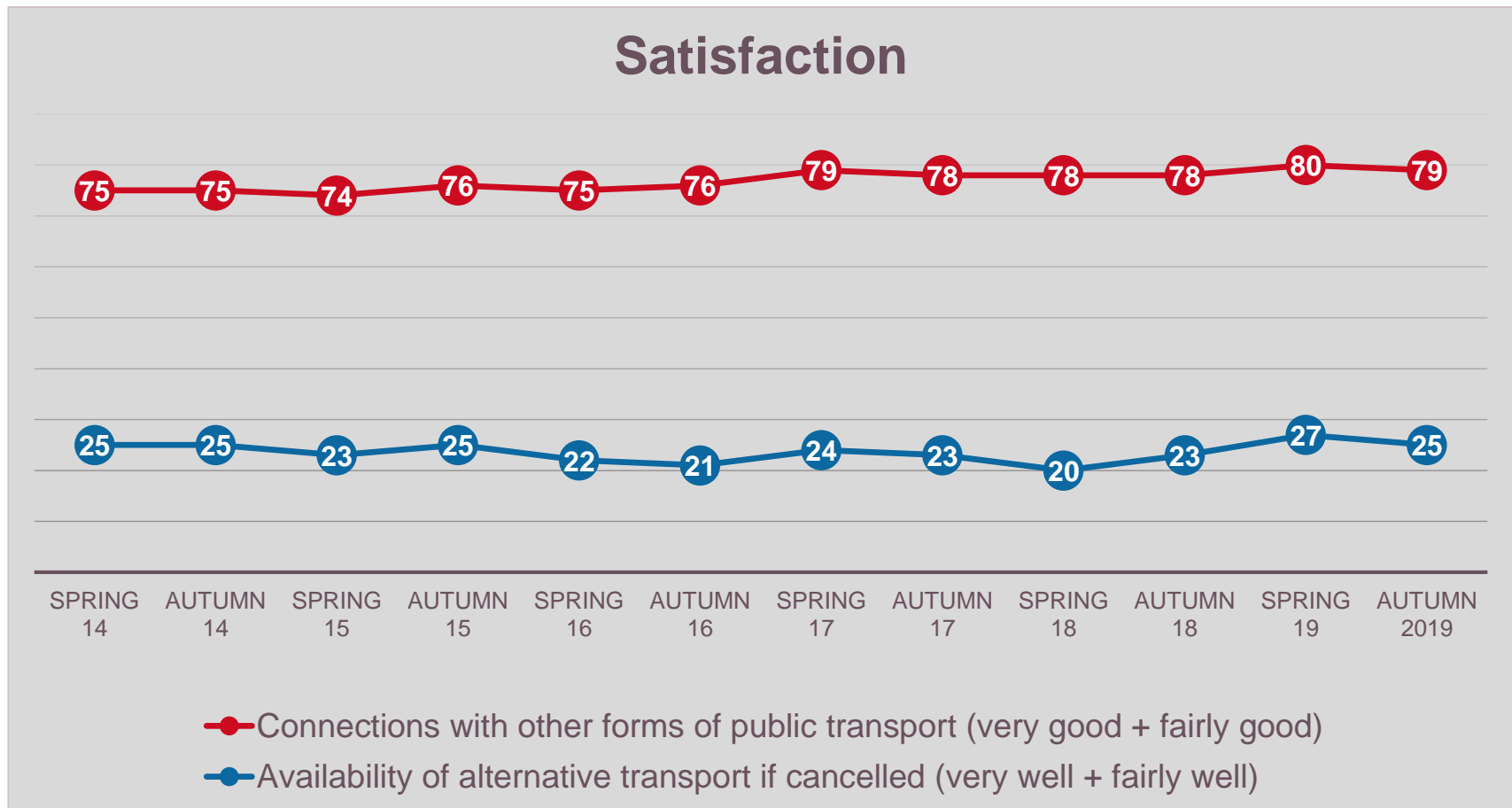
# Passengers are increasingly more connected on train journeys

Items brought on train



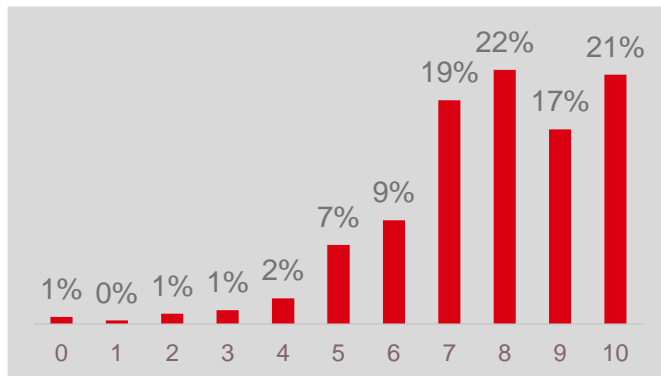


# Yet still room to improve satisfaction with connections to other transport, especially when service is disrupted



# While many think public transport is a good idea, they don't necessarily want to use it themselves

**79%** agree “Public transport...is **essential** for helping **everyone** get where they want or need to go”



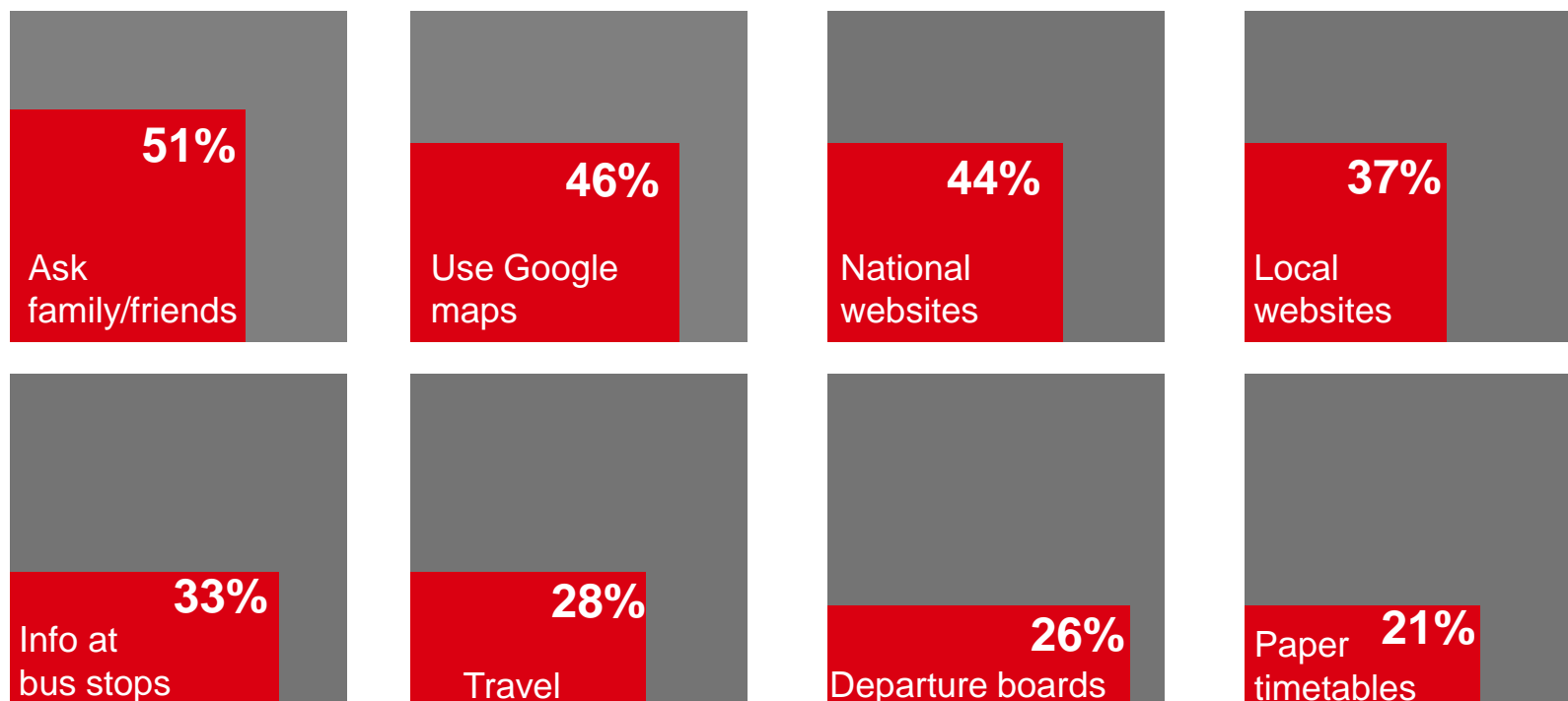
Q6) To what extent do you agree with the following statements about public transport?  
Base: all (1003)

...needs **more investment**” **75%**  
...meets **my needs** well” **61%**  
...is good for **environment**” **57%**  
...is for people **without a car**” **56%**

**While some passenger needs and behaviours point to MaaS, there are barriers to doing something different...**



# For young people information comes from Google Maps and family/ friends – then becomes habit?

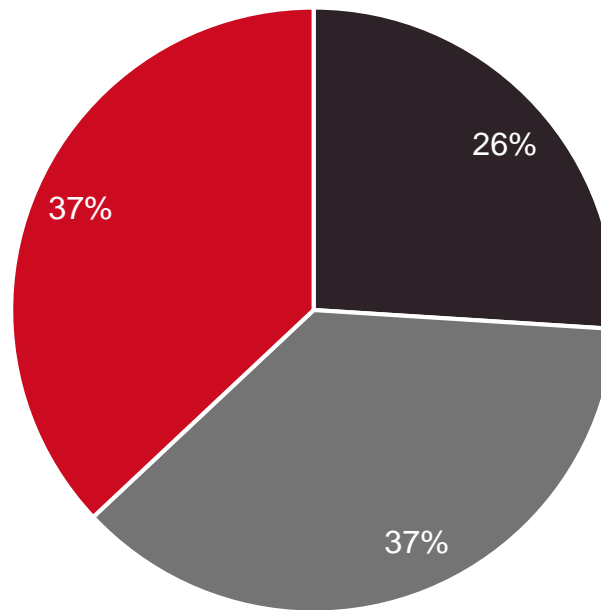


Q5) How do you find information about your journey/plan how you are going to get somewhere – Journey planning?  
Base: all (1003)

# Many passengers like to stick to what they know as it feels easier

**1** in 4

passengers research all options before heading to the airport –an infrequent and high-risk journey



- I thoroughly researched all possible ways of getting to the airport
- I checked out a couple of options I knew about
- I didn't really look at different ways of getting to the airport

# Just because something is better value for money, doesn't mean passengers will use it

Nearly **1 in 4**

passengers (24%) who travel by train 5 or more times a week are travelling on a single/return ticket or pay as you go

**1 in 5**

passengers (21%) who travel by bus 5 or more times a week travel on a single/return ticket or day pass

# Our 'Give Bus a Go' campaign (and other work) shows that often reality is better than perception



“There were many positives  
- contactless payment,  
helpfulness of staff, modern  
buses, CCTV, surprisingly  
good timekeeping. Journey  
time can be quicker than  
alternatives end to end.”  
- Busketeer



# Need to make sure individual journeys feel easy, intuitive, connected, flexible & good value





# Ways to achieve this...

1. Teach people about **how transport systems work**
  - Where to go and look & what to do. Effective communication channels
  - Make it simple to understand
2. Build **confidence** around what to do
  - Relieve anxieties
  - Don't assume they know what to do
3. **Design** systems **better**
  - Provide easy to find, centralised and streamlined information, visual map, detail on fares – with the ability to personalise
  - Minimal interaction needed, but make it more like other experiences, e.g. cinema, working easily on mobile with ticket purchase and activation
4. Improve **journey experience** – tackle perceptions & be consistent
  - Resolve issues with crowding/timekeeping – real time information
  - Environment at stations and stops/on board
  - Approachable staff, information on-board, productive time
5. **Review fares**
  - Consistent and logical fares
  - How to find the 'best ticket' can I use my pass? – properly targeted promotions
  - Easy to find the cost, buy ticket and pay