

#### **Summary (1/3)**

- In November 2021 Transport for the North (TfN) commissioned Ipsos to undertake qualitative research with residents in the North of England to explore a range of topics relating to rail travel. The research took place over two stages with five online focus groups taking place in late 2021 (November/December) and an additional five groups in early 2022 (February/March). Overall, 55 participants took part. Key areas of discussion included rail travel patterns, journey planning, ticketing and fares, journey experience, preventative COVID-19 measures when travelling, anti-social behaviour and general barriers to travelling on rail. Key findings from the research are presented below:
- Overall, there was a sense participants desired to get back to 'business as usual' in terms of their rail use.
   Although still conscious of COVID-19, participants appear to be travelling more frequently than during the pandemic. Those who used rail to commute to work before the pandemic had started again at the time of the focus groups, although for some, this was less frequent due to flexible working arrangements now in place.
- Infrequent rail users in the February/March groups mentioned that they travelled by rail roughly the same amount as they did prior to the pandemic suggesting that mobility continues to recover in spite of any perceived continued threat from the disease. This contrasts with infrequent rail users from the November/December groups who travelled less often compared to before the pandemic this was because they wanted to avoid crowded places at the time, such as city centres.

#### **Summary (2/3)**

- There were capacity concerns among more frequent rail travellers. Participants who took part in the November/December groups were more likely to mention this as an issue because of the inability to socially distance themselves from other passengers. While some participants from the February/March groups mentioned similar issues, there was a general perception that more trains and carriages should now be available given more people are back to travelling at peak times compared to during the pandemic.
- When considering ticketing and fares, participants often found the pricing and ticketing systems confusing.
   Smartcards, and to an extent the concept of using a contactless card to pay for tickets, proved popular among the participants (though some were apprehensive of linking their personal debit card with their ticket).
- Overall awareness of the flexi season ticket was low. While some participants said they could see its usefulness
  for other rail travellers, they were less likely to say it would be useful for their own purposes. This was largely due
  to the two station restriction and the eight day limit, which did not meet their needs. A range of six to ten days was
  generally preferred to eight days.



#### **Summary (3/3)**

- Fewer participants in February/March wore facemasks, or took other COVID-19 prevention measures, compared to participants in November/December. There was a sense that government mandates largely influenced people's behaviour to wear facemasks when travelling by rail. Focus groups in November/December (when the Plan B restrictions were announced) were more likely to say they wore a facemask when travelling compared with participants in February/March (after the restrictions had been lifted).
- Participants generally felt safe on trains. Although they were aware antisocial behaviour and harassment occasionally happens on trains, they were split when it came to having either witnessed or experienced it with some having had negative experiences. There was a consensus that this typically happens late at night, and if possible participants would try not to travel late. Antisocial behaviour and harassment, however, did not deter individuals from using rail or opting for another mode of transport instead.
- Participants would like to see increased staff presence on trains and at stations. Staff are seen to provide both a
  sense of safety (particularly late at night from anti-social behaviour) while also being a quick, easy and reliable
  source of information or assistance (particularly for those who are disabled). Staff presence was also seen as an
  important factor for making a good station.



#### Methodology (1/2)

- Ipsos conducted ten online focus groups with residents in Northern England. The first series of five groups was conducted between 29 November 8 December 2021 (wearing facemasks on public transport was made compulsory on 30 November while the Plan B work at home guidance started 13 December). The second series of five groups was conducted between 28 February 3 March 2022 (roughly one month after all restrictions ended on 26 January).
- In line with Market Research Society and government guidelines on social distancing at the time of fieldwork, participants were recruited through free-find on street recruitment via an external recruitment partner.
- For each 90 minute discussion, six participants were recruited, with between five and six in attendance across the groups.
   Conversations with participants were structured by a discussion guide covering several topics reflecting the project objectives. All groups were conducted online using Teams and audio-recorded for transcription with the advance consent of participants.
- The dates and profile of the groups can be found in the following two tables:

**Table 1: Series 1 Focus groups** 

Group	Date	Profile	Region
1	29 November 2021	Frequent users of rail (at least once a week)	North West
2	1 December 2021	Frequent users of rail (at least once a week)	North East
3	2 December 2021	Frequent users of rail (at least once a week)	Yorkshire
4	7 December 2021	Frequent users of rail (at least once a week)	Pan-North
5	8 December 2021	Infrequent users of rail (less than once a week)	Pan-North



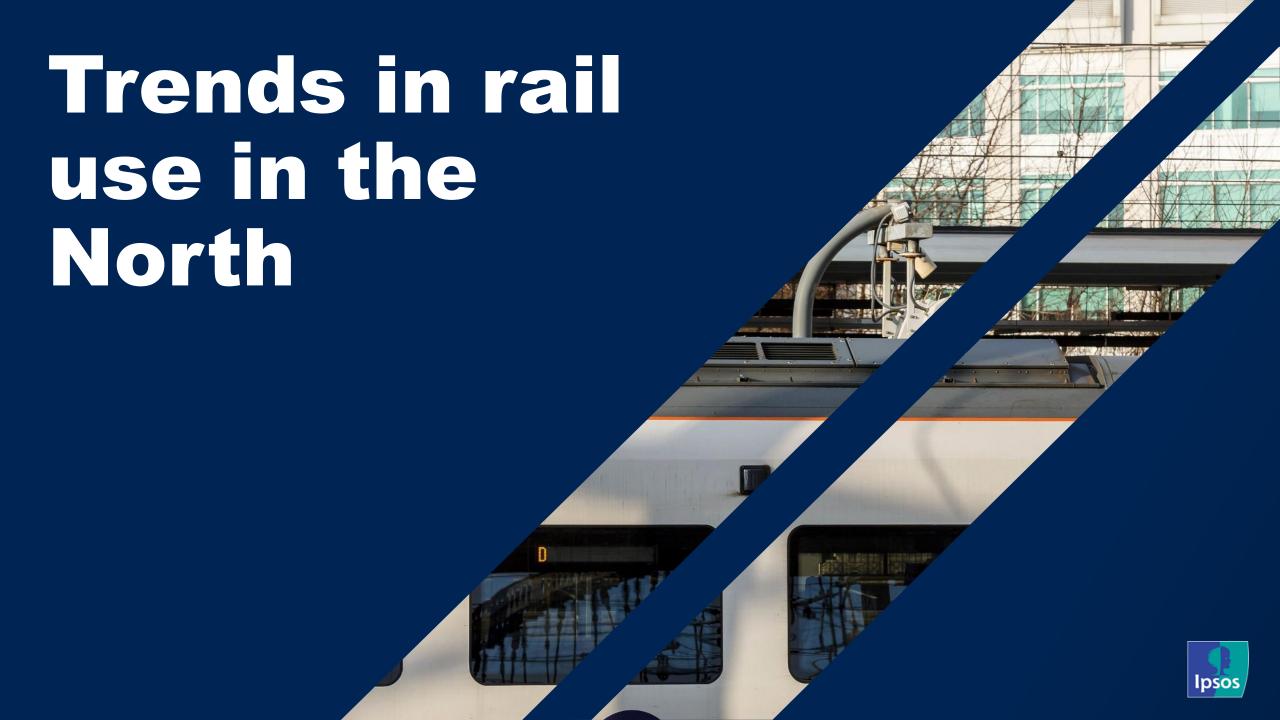
#### Methodology (2/2)

**Table 2: Series 2 Focus groups** 

Group	Date	Profile	Region
1	23 February 2022	Frequent users of rail (at least once a week)	North West
2	24 February 2022	Infrequent users of rail (less than once a week)	Pan-North
3	28 February 2022	Frequent users of rail (at least once a week)	Yorkshire
4	2 March 2022	Infrequent users of rail (less than once a week)	Pan-North
5	3 March 2022	Frequent users of rail (at least once a week)	North East

This report also shares data from the Transport Focus Weekly Rail User Survey from the Week 13 wave (conducted between 8-12 December 2021) and the Week 23 wave (conducted between 2-6 March 2022). Each omnibus wave consists of roughly 500 interviews with rail users across Great Britain. Both waves were conducted at similar times to the focus groups and help provide some context with overall rail user public opinion. More information can be found on the <u>Transport Focus website</u>.





# Familiar pre-pandemic issues with rail emerged during the groups, including capacity, reliability and ticketing costs

- Frequent rail users in both November/December and February/March expressed concerns about capacity, mainly with overcrowded trains during peak times. Participants in November/December, however, were more likely to highlight this within the context of COVID-19 as it prevented them from being able to socially distance themselves from other passengers, particularly those who did not wear a facemask while travelling. Although some participants commute less often than prior to the pandemic, most did not feel an adequate number of trains and carriages were being provided to meet with current demand thus leading to overcrowding.
- Those who travelled more frequently were more likely to have general dissatisfaction with the reliability of rail, citing recurrent delays and disruptions at peak times. Infrequent rail users were less likely to report this as an issue.
- Both frequent and infrequent rail users had issues with the cost of tickets being too high with some stating that the quality of rail travel is not increasing at the same rate as ticket costs.

"For me, it's after all of this COVID sort of stuff, they're still packing the trains like...It's always full. Like, at some points, I can't move in the train. And, I feel like, after the pandemic, it's a bit of a stupid decision to do" Male, 21, Frequent user

"Quite often I find they're late or they basically don't turn up...I do think it's probably a bit pricey as well, considering the levels of service that they provide, and I mean, it's nothing fantastic actually inside, except for a seat "Male, 54, Frequent user"

"I think the prices of trains in this country are very high for a very inconsistent service and I know it sounds like it's a bit of a trough of British moaning and stuff but when you compare it to some trains on the continent like Germany for example, superefficient and super clean", Male, 33, Frequent user



#### COVID is less of a barrier to rail travel than it was mid pandemic

- Overall, frequent rail users mentioned they are currently using rail less frequently than they did pre-pandemic – largely due to available flexible working as opposed to concerns about COVID-19.
- Infrequent rail users in the November/December groups said that
  they were travelling less often than they did before the pandemic,
  citing that they travelled less for leisure overall and wanted to avoid
  places with large crowds due to COVID-19. Infrequent rail users in
  February/March however were more likely to say that they are
  travelling at roughly the same rate they did before the pandemic.
- Few participants mentioned that they changed the time of day they travel compared to before the pandemic - those commuting to work travelled at peak times just as before, while infrequent/leisure rail users continued travelling at off-peak times and the weekends.
- Overall, participants were unlikely to use alternative modes of travel to rail due to the pandemic. This is consistent with findings from the Transport Focus Weekly Rail User Survey which found that 44% of rail users had options to use other modes to make their last journey but still chose the train.

"I personally think, like, in the middle of the pandemic I think it was one of them where you, kind of, would avoid it as much as you could because you felt uncomfortable but then obviously as it's rolled on I think for me personally I feel a lot more comfortable, I don't really worry at all" Female, 20, Frequent user

"My usage also has gone down quite considerably. Like I say, a lot of my travel was event-dependent, but because events haven't quite got back to there, you know, it's not been the reason for travel....with work for myself, I've gone from being in an office five days a week to being 100% working from home" Male, 31, Infrequent user

"For me, it's probably the bus, but simply because it's cheaper, you know what I mean? It's just, like, work, obviously, went a bit slower. So, I couldn't really just be throwing money around so much." Male, 30, Frequent user





# Rail users tend to use mobile apps on their phone to plan their journey

- Mobile apps were commonly used by participants to plan their journey. They typically used the app for buying tickets, checking times, journey length, and if their journey required any changes.
- Trainline was the most mentioned app of choice followed by those provided directly by train operators, such as Northern. Google was also used by participants to check train schedules generally when using a laptop or PC.
- Participants felt there wasn't a single app that could provide all the information they need, and opted to use different apps for different information, although Trainline was seen as the app which was the most 'complete' in this regard.

"For me, I check if there's, like, a direct train because obviously, I'd always prefer that, because it's just quicker." Female, 30, Frequent user

"Everything I do is smartphone-related and I just whip it up, I check the timings and that's the first thing I do, just checking the timings, making sure everything aligns with my calendar and my plans" Male, 24, frequent user

"It's got everything on there, even down to booking your tickets and the platform. Because everything is in one place - its convenient "Female, 33, infrequent user



# While there was a preference for finding information digitally, there was some concern for the less tech savvy

- Participants mentioned different types of information they would like to plan their journey but have difficulty finding. This includes things such as the number of carriages, crowd levels and seat allocations. Some mentioned that seat reservations have not been working properly during the pandemic.
- However, some individuals preferred not to get information before their journey and simply get it at the station if required.
- Although finding the necessary information was seen as easy to do via a digital format, there was some concern for those who have less experience with digital technology if this information was to completely move to a digital platform in the future.

"I know the times of the trains, my usual routes. I prefer asking someone if I don't know. I always assume the time will be okay, don't check for disruption. Check when I'm at station" Female, 48, Frequent user

"[My parents] don't use computers, they can barely use their phones and I found they're just, sort of, you know, getting left behind as different services get cut off and stuff and it's only catered to people who are savvy on the phones and the computer." Male, 24, frequent user



# While ticketing prices were important to planning a journey, few would check for disruptions ahead of travelling

- There was consensus that prices were important when planning a train journey. If rail users could be flexible as to what time they travel, they would often opt for off-peak fares as they are cheaper. When travelling for leisure, participants mentioned that they often book in advance to get better value for money.
- Participants did not usually check for disruptions ahead of their journey and usually relied on the platform notice board instead. However, users mentioned the Trainline app as providing delay alerts, which was good to have particularly when making connection changes.
- Some participants mentioned that they would like disruption information to be more real time on the Trainline app - for example, knowing where the train is stopped or whether it actually left the last station.

"Always try and book well in advance because it's cheaper. Usually book the same trip repeatedly. If it's a leisure trip I would change times to fit in with cheaper fares" Female, 52, Frequent user

"For me, on Trainline, sometimes if the first train's delayed, it will tell me the second train, I won't have enough transfer time to make it" Male, 21, Frequent user

"The only thing I look for really is the times and how long it will take" Female, 21, Frequent user

"I don't really check [for disruptions] until I get to the train station, I've never really had any problems" Female, 47, Infrequent user





# Overall, ticket purchasing behaviour is down to personal preference, although online is most popular

- Ticket purchasing is a matter of personal preference for the group participants. Participants felt comfortable using a mobile app for ease and convenience, but others preferred 'click and collect' as it better suited their personal circumstances. There was no obvious change in purchasing habits as a result of COVID-19, although a small number of participants in November/December felt it was safer not to use a ticket machine.
- Participants who preferred purchasing from a manned ticket office did so either out of necessity for example because they had particular travel requirements (e.g. disabled traveller) or due to preference for face-to-face interaction. Many recognised the benefit of actually speaking to someone when it comes to ticket options as well, particularly given the sometimes perceived complexity with different ticketing options. Contactless card payments, however, were most likely used over cash if using the ticket office.
- While participants felt they were confident when it comes to navigating the ticket options and selecting the best value ticket for their journey, there was nevertheless a general sentiment that how the tickets are presented could (and should) be simplified. In particular, participants did not understand why prices fluctuate so much over time and closer to the day of journey.

"You don't know who has touched the screens before you, this was the same pre pandemic so I carried on using my own device" Male, 44, Infrequent user

"I like cash but since the pandemic, card all the time or I prefer to pay online, mainly so you've got a record because if you lose your ticket you can at least say, 'Look, here's the receipt, I did pay'" Female, 43, Frequent user

"I use the ticket office whenever I was living away from home as I didn't know the area well so it was nice to talk to someone" Female, 27, Frequent user

"The price puts me off sometimes. You could be travelling 30 minutes later and be saving £5, it doesn't really make sense to me" Female, 38, Frequent user

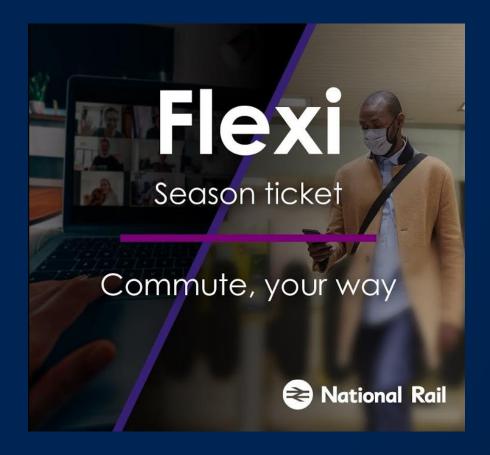


#### Flexible tickets

#### Overall, awareness of this option was low...

However, after digesting the information on it participants tended to be positive towards the ticketing concept and could understand its benefits. However, three issues remained:

- The 28 days period was an insufficient time to use up the eight tickets (albeit based on current travelling patterns).
- Eight days of travel was not the best number for some. However, when asked how many would be best, options ranged from six to ten days. Some asked if it would be possible to have different options or let passengers pick the number of days they want.
- Naming two stations would likely reduce uptake as several participants tend to travel from different stations on a frequent basis therefore a zonal structure may be seen as more beneficial.





#### **Smart cards**

#### Participants generally approved the concept of smartcards...

Overall, there was a good level of awareness about them with many referencing London's Oyster Card as a comparison and having a physical card (as opposed to paper) was an advantage for some. Some also mentioned a preference for Smart cards if able to use across other modes as well (e.g. bus).

Others mentioned that contactless cards had already superseded the Oyster Card in London, and there were questions as to whether these were necessary given the technological advancement with contactless ticketing.

Some participants also didn't like the idea of carrying another card with them, particularly those who travel on more than one train operating company.





#### **Contactless ticketing**

Participants were generally positive towards the contactless ticketing concept....

It is a recognised means of paying in shops and those who had travelled to London had experience of using such technology to travel.

Some participants had already made the jump to using contactless for travel and would favour this method over any smartcard scheme.

However, there was concern about the perceived direct link to their personal bank account from a security perspective. There was also some scepticism about the fare which they would be charged, with some commenting that they would not know how much they had been charged (particularly as they don't review bank statements regularly).





#### Mobile apps

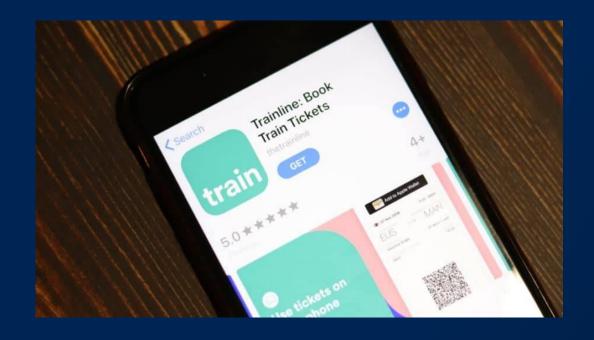
#### Familiarity with mobile apps is well established....

Participants felt comfortable using apps to travel with and identified that they could also collect tickets (via print) if necessary, so it provided more than a single solution – this was particularly important if a phone lacked charge and accessing a ticket became a problem.

Overall, apps were more 'trusted' than contactless ticket options (largely due to familiarity).

Some also mentioned that they sometimes have to use more than one app, which can be fiddly and time consuming for them.

While most participants said they never had any issues using an app for rail travel, they did note (as mentioned above) a potential issue could be if your phone battery runs out of power while travelling.







# Wearing a facemask is the most common COVID-19 preventative measure rail users take, although it is becoming less common

- Participants in the November/December focus groups were more likely to say that they wore a facemask when travelling by rail as a way to prevent either catching COVID-19 or spreading it, while participants from the February/March focus groups were less likely to do so.
- This decline in facemask use is consistent with data from the Transport Focus Weekly Rail User Survey which finds 46% saying they wore a facemask when traveling on rail between 2-6 March compared with 62% who said this between 26-30 January.\*
- Among those who wore a facemask in the November/December focus groups, it generally made them feel safe and they would get frustrated when they see passengers not wearing one. Some at this time, however, said they wore masks to simply be courteous to other passengers.

"When it was mandatory, I did wear them. I noticed the conductors still wear them. In terms of myself, if it's not mandatory, no, I won't." Male, 41, Frequent user

"I wear a mask and use my hand sanitiser. I have my own [hand sanitiser] anyway, because I'm worried about who touched it" Male, 31, Frequent user

"Everybody's an individual [and can do what] they want to do, if they want to keep doing their own sanitiser and they want to keep wearing the masks then just let them get on with it" Female, 61, Infrequent user



<sup>\*</sup> This question was not asked in the Week 13 survey when the first focus groups were conducted

# Participants were more likely to wear facemasks when they were required to do so by government

- Although few in the February/March focus groups said they continue to wear facemasks when travelling by rail, they occasionally would wear one when sitting or standing next to individuals (who were typically older) who were wearing a facemask this was to make that person feel comfortable. Some decided to wear a mask to simply not appear like they are not doing enough to stop the spread of COVID-19.
- New government guidelines announced just before the November/December focus groups set the requirement for passengers to wear facemasks on public transport. However, participants at the time did not notice an immediate change. Most of these participants felt that the new measures were a good idea and mask wearing should have continued.
- Participants in the February/March focus groups (after facemask requirements on public transport had been lifted), however, did not mention any demand for the government to maintain the public transport facemask requirement.

"It's also then just, like, the etiquette aspect of it and it was like, you know, we're all doing the same thing wearing masks, washing hands, keeping distance but there was always sometimes, how do I put it, paranoia of people thinking that you're not maybe doing enough" Male, 32, Frequent user

"when we were in the pandemic although we were using the trains, the masks were enforced, I really struggled with the masks with my anxiety stuff but, you know, for the greater good I put it on" Male, 36, Infrequent user

"I'll put one on but I know that it's become, kind of, like, a political point now with masks and it's, sort of, you know when you're just like, I just want to put my mask on and just sit down and I don't want someone to hassle me about it." Male, 32, Frequent user

# There was a difference in facemask behaviour when travelling in Wales or Scotland compared to travelling in England

- Some participants mentioned that they altered their behaviour if travelling in Wales or Scotland where facemask requirements were stricter. These individuals said that they were more likely to wear a facemask when travelling in these regions because other passengers were more likely to have been wearing facemasks. In England, however, they were less likely to where a facemask because other passengers were also less likely to do so.
- In addition to facemasks, some individuals carried hand sanitiser while some said they did not feel safe using publicly available sanitiser unless it was automated. There was less of a sense that hand sanitiser use differed when travelling in the other UK nations.
- The Transport Focus Weekly Rail User Survey found a majority (55%) of rail users across Britain is satisfied with COVID-19 measures on their train and at the station between 2-6 March, although this is down from 65% between 8-12 December.

"I find myself behaving a certain way in Wales and a different way in England, which is just bizarre really. Well, in Wales it just seems a lot more, you know, 'These are the rules, wear the mask, sanitise, distance.' And it's mad, but, you know, you can then be in England and no one really gives a damn about the masks and all of that sort of stuff." Male, 41, Frequent user

"I have hand sanitiser, especially if travelling with my mum, she's classed as highly vulnerable. I don't worry about opening the window cause cold and try to keep space" Female, 43, Frequent user



# Although participants had concerns regarding antisocial behaviour and harassment, it did not prevent them from using rail

- Although participants generally felt safe on trains (also demonstrated in the Transport Focus Weekly Rail User Survey where 83% in both December and March said they were satisfied with their personal security during their last journey) they were aware antisocial behaviour and harassment occasionally happens, though split when it came to having either witnessed or experienced it. Some have had rather negative experiences.
- There was a consensus that this typically happens late at night, and if possible they would try not to travel late. However, antisocial behaviour and harassment did not deter individuals from using rail and opting for another mode of transport. Just one individual mentioned they might get a taxi late at night instead (if possible).
- Participants felt strongly that there should be a greater staff presence in the evening on both the train and on station platforms to deter antisocial behaviour and harassment, or help individuals who have been victim to them. One mentioned that unlike a bus, you cannot just get off a train if feeling unsafe.

"I think it depends which train you get. I've had some late trains where we've come back from, like, concerts in Manchester, where it might be the last train, or coming back from York and I've found that's when you can get some lairy characters on those, kind of, last trains" Female, 31, Frequent user

"When people have been on a night out, they get carried away and I've seen people been violent. It makes you feel unsafe, and I've experienced racism" Male, 54, Frequent user

"[in reference to buses] you can, kind of, get on and off quicker, if you get what I mean." Female, 61, Frequent user



# People were generally satisfied with their station but would like more staff presence

- Most participants walked to get to their home station, while some mentioned they use a bike, drive or get a lift. Some participants in the February/March focus groups mentioned they occasionally use the bus. This was the case for both commuting and leisure travel.
- Most individuals were satisfied with their home station (the Transport Focus Weekly Rail User Survey found 80% of rail users across Britain satisfied with their train station between 2-6 March).
- Those in rural areas did not require much from their station, they expected more facilities at urban stations (such as shops or a coffee stand). However, accessibility was a concern, with some individuals mentioning it is difficult to either reach platforms or get to a train if using a wheelchair.
- Accessibility, toilets, seating, adequate lighting, but most importantly staff presence, were all things mentioned that make a 'good' station.
   Staff are seen to provide both a sense of safety (particularly late at night from anti-social behaviour) while also being a quick, easy and reliable source of information or assistance

"So, for me, when somebody's there, it's a great station, if nobody's there, no, it's a bad train station" Female, 30, Infrequent user

"Handforth train station either side there are just steps. So if in you're in a wheelchair or you're disabled or anything like that, there's no way you can get on our platform" Male, 31, Frequent user

"A good station is manned. Ticket machine's sometimes broken, sometimes you're getting the wrong ticket or wrong day. I like to talk to someone. I've been caught out buying the wrong ticket by accident, people not machines can help you in this situation. It gives me confidence in the way I travel. "Female, 43, Frequent user



# Active travel was often used to reach final destinations upon reaching the station, with participants in February/March more likely to mention other forms of public transport use

- Once reaching their destination station most participants would then walk on to their final destination. One individual mentioned that they took a Brompton bike with them on the train so that they could cycle to work once they reached the city station. Again, although public transport was not mentioned by participants in November/December (except one person said he occasionally would get a taxi) a few participants in February/March mentioned the bus and tram.
- Several people mentioned that they occasionally would be required to change trains at some point in their journey to reach their final station. For these people, this was a simple process and they typically knew how to do this as they've done it several times before. Some mentioned they would check the second train's time on an app before reaching the interchange station while others relied on the platform information board.

"If I'm using it for work, then I just walk from there, I don't need to use anything else. I do some journeys where I need to change, and that's always mainly been okay, but there have been times when, if your train is running late, then you're going to miss that link. The majority when I use it, I'm just walking, then, to work" Female, 31, Frequent user

"Depending on the station I'm going from, so if I'm going on regionally or if I'm going on, like, a longer journey from Piccadilly or Victoria then it's a tram or a regional train job. "Female, 43, Frequent user

"I change trains usually, some are direct but mostly I have to change at Salford. They're only 5 minutes after. I've never missed a connection or anything. I use the station board to check when I get there." Female, 38, Frequent user

#### **Ipsos Standards & Accreditations**

Ipsos's standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.



**ISO 20252** – is the international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos UK was the first company in the world to gain this accreditation.



The UK General Data Protection Regulation (UK GDPR) & the UK Data Protection Act 2018 (DPA) – Ipsos UK is required to comply with the UK General Data Protection Regulation and the UK Data Protection Act; it covers the processing of personal data and the protection of privacy.



MRS Company Partnership – By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self regulation of the MRS Code; more than 350 companies have followed our lead.



**HMG Cyber Essentials** – A government backed and key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessment validated for certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.



**ISO 9001** – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



**Fair Data** – Ipsos UK is signed up as a 'Fair Data' Company by agreeing to adhere to ten core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.



**ISO 27001** – International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252.



# For more information:

Name:

Glenn Gottfried

**Details:** 

glenn.gottfried@ipsos.com

Name:

Aaliyah Al Aqel

**Details:** 

aaliyah.alaqel@ipsos.com

Name:

**Matt Bristow** 

**Details:** 

Matt.bristow@ipsos.com

