Department for Transport

Ticket purchasing behaviour and preferences among rail passengers

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Executive summary

Background, Objectives and Methodology

The Department for Transport (DfT) commissioned independent research agency, Savanta to undertake quantitative research to explore current ticket purchasing behaviour in England and identify barriers or potential barriers to ticket purchasing that may exist or be exacerbated by a shift towards digital ticketing, with particular focus on how vulnerable passenger groups might be affected. The research also tested likely uptake of possible new initiatives that may mitigate the impact of potential reforms brought in under the Plan for Rail.

The core objectives of this research were to:

- Explore how rail passengers make ticket buying choices, including the factors that impact their decisions and the weight they attach to these factors. This will build understanding of how rail passengers currently purchase tickets and how this may impact their future behaviour.
- Explore how vulnerable groups make ticket buying decisions and identify any barriers or potential barriers to rail travel that may exist or be exacerbated by a shift towards digital ticketing. These vulnerable groups include but are not limited to: people that need to pay by cash, people that do not have a bank account (unbanked), people that have no access to or lack the confidence to use the internet or a smartphone, and disabled people.
- Understand the proportion of rail passengers most likely to be impacted by a shift towards digital ticketing.
- Identify the common characteristics of those rail passengers that may face barriers to digital ticketing in the future.

To ensure the research was inclusive and representative of all rail passengers in England (covering DfT contracted Train Operating Companies), an on-train paper and pen self-completion methodology was used. This is a well-established approach used within rail research to provide robust and representative samples of rail passengers. Using an on-train paper and pen self-completion approach, as opposed to an online approach, ensured that all rail passengers had an equal chance of participating, regardless of whether or not they used or had access to the internet.

The on-train self-completion approach was supplemented with reply-paid envelopes for postal returns of the paper-based survey and QR codes enabling those rail passengers with shorter journeys or insufficient time onboard the train to complete the survey post journey. Rail passengers were also offered the opportunity to complete the survey over the telephone, an option that helped ensure visually impaired passengers were not excluded from taking part in the research.

Fieldwork took place over a period of 5 weeks, from 20th February – 26th March 2023 inclusive. During this period 160 fieldwork shifts were undertaken across all DfT contracted TOCs in England, with each lasting approximately 6 hours. To ensure a broad range of journey types (e.g., commuter and leisure), fieldwork was conducted across different days of the week and times of day, with a mix of morning, evening, and weekend shifts. However, it should be noted that less frequent travellers may be under-represented in the data.

A total of 8,132 questionnaires were completed during the fieldwork period.

Key Findings

Core themes

Findings presented in this report represent a snapshot of rail user behaviour and preferences at the time of fieldwork (February-March 2023).

Digital ticket purchasing methods are widely used and preferred: Over three quarters (77%) of respondents said they currently use a website or app to purchase train tickets, and most of this group (72%) reported that they prefer online payment methods. Overall, just over half of respondents (54%) said that they prefer to purchase tickets online, with 56% selecting ‘getting the best price ticket’ the most important reason for their preference.

Ticket office use extends beyond ticket purchasing: Around a quarter of respondents said they quite often or regularly use a ticket office to purchase tickets (27%), obtain information about train journeys (27%) or obtain information about fares and tickets (24%). One quarter of respondents (24%) said that they prefer to purchase their train tickets from a station ticket office, with getting the best price ticket (36%) and using the quickest option (34%) most often selected as important in this choice. Trust and in-person purchasing were more important than average to those who prefer ticket office purchase 11% of this group selected 'using the option I trust' as most important in deciding how to purchase their ticket (vs. 6% overall) and 14% selected 'preference for purchasing tickets in-person' as most important (vs. 4% overall).

Staff presence at the station is most often considered important for ensuring personal safety and providing general customer support: Most respondents rated staff presence as important for ensuring personal safety (81%) and providing general customer support (80%). The proportion of respondents who rated staff presence important for providing support with purchasing tickets was lower, at 58%.

Regional differences appear to influence purchasing behaviour and preferences: For example, those living in the South East and East of England were most likely to say they use and prefer orange cardboard tickets (with 50% and 47% respectively saying they use

these most often, and 38% in both areas saying they were their preferred option) - possibly because this ticket format can be used to travel across London (via Transport for London), something that would likely be of more value to those living in and/or travelling from the areas around London.

Age is a key determinant of purchasing behaviour and preferences: Respondents aged 66+ were more likely than other age groups to face barriers to digital ticketing. Compared to younger respondents, those age 66+ more often reported having no access to the internet on a smartphone, making payments in cash only, and/or having a health condition affecting their mobility, hearing, or dexterity. As might be expected, preference for purchasing tickets from a ticket office was higher for those aged 66+ (48%, vs. 12% for under 26, 19% for 26-45, and 30% for 46-65).

Bank account access is lowest among those aged under 26: One in five (20%) of those aged 16-17 reported they do not have a bank, building society, post office, or credit union account (compared to 6% among those aged 18-25, 3% among those aged 26-45, and 1% among those aged 46+). Overall, preference for ticket office purchase was higher for unbanked respondents, compared to those with a bank account (29% vs. 23% respectively), but the difference is not as striking as seen for other vulnerable groups, including cash users (66% vs. 23% of card users), those with no smartphone internet access (72% vs. 22% with smartphone internet access), and those who don't make online payments (71% vs. 21% who make online payments).

Ticket purchasing behaviour and preferences

Just over half of respondents (54%) said that they prefer to purchase tickets online, via a website or mobile app. One quarter (24%) said they prefer to purchase tickets at the station ticket office. Preference for TVMs was on a lower level (at 11%). Stated preference for tap in/tap out was also at 11%, however this is likely influenced by differing levels availability and familiarity across regions.

Respondents aged 66+ were more likely than others to say they prefer to purchase their tickets from a station ticket office (48%, compared with 12% for under 26, 19% for 26-45, and 30% for 46-65). Those aged under 26 are more likely than others to prefer to purchase their tickets online (69% vs. 56% for 26-45, 48% for 46-65, and 38% for 66+).

Regardless of their preferred purchase method, achieving the best price (46%), using the quickest option (34%), and ease/convenience (22%) were the most important factors respondents considered when deciding how to purchase their tickets.

Over three quarters (77%) of respondents said they currently use a website or app to purchase train tickets, with speed, ease of use and expecting to get a cheaper ticket being the main reasons for doing so. There is a clear correlation between age and website/app purchasing, with reported use of websites/apps for ticket purchase decreasing with age (86% for under 26s, 80% for 26-45, 73% for 46-65, and 59% for 66+).

Most respondents (95%) said they had used at least one form of bank card transaction to pay for their train tickets in the last six months. One in six respondents (16%) said they had used cash to buy a rail ticket in the last six months. Cash use tended to be higher

among those aged 16-17 or 66+ (29% and 22% respectively) and those with a household income of £30K and under (20% vs. 12% among those with over £30K).

Orange cardboard tickets were the most often used ticket fulfilment option, closely followed by digital barcode/QR code tickets (34% and 31% respectively). Preference for these options is also on a similar level (28% and 32% respectively). In both questions, digital barcode/QR code and orange cardboard tickets were the most selected options.

Frequency of travel has an impact on preference for the different ticket fulfilment options, with less frequent travellers tending to prefer orange cardboard tickets (34% among those who had travelled less than once a month in the last six months, vs. 24% among those who had travelled at least once a week).

Current use and importance of station retailing facilities

Ticket Offices and staff presence at stations

Two fifths (42%) of respondents said they had quite often or regularly used a ticket office for any purpose in the last six months.

Ticket offices were most often used to purchase tickets, to obtain information about train journeys and to obtain information about fares and tickets (used quite often or regularly for these purposes by 27%, 27% and 24% respectively). Reported use for these transactions, was significantly higher among those aged 66+ (45%, 37% and 38% respectively).

Among the 56% of respondents who said that having a ticket office is important, 60% had used one quite often or regularly for any purpose in the last six months. Ticket purchasing is the primary function for this group, with just over two fifths (43%) having used a ticket office quite often or regularly for this purpose.

However, many don’t use ticket offices and it is clear that the perceived importance of a station ticket office is connected with staff presence, and not only the services that a ticket office provides. Among those who said the presence of a ticket office is important to them personally, nearly one fifth (18%) had not used one to purchase train tickets in the last six months.

Staff presence in general was considered important, particularly in relation to the perception of personal safety it provided (81% rated staff presence important for this purpose). The importance of a staff presence in providing this reassurance was highest among female respondents (88%), those with a disability of any type (85%) and those aged 66+ (85%).

Ticket Vending Machines (TVMs)

Overall, two fifths of respondents (42%) reported that they have used a TVM quite often/regularly for any purpose in the last six months. Nearly one fifth (18%) said that they have used TVMs quite often/regularly for multiple purposes, compared with almost three in ten (28%) who said they have used a station ticket office quite often/regularly for multiple purposes.

The most common use of TVMs was for the purchase and the printing of train tickets. Three in ten respondents (29%) said that they quite often/regularly used a TVM for ticket purchase, and one quarter (26%) used TVMs quite often/regularly to print out pre-purchased tickets.

The groups most likely to have used a TVM to purchase tickets are those aged 26-65 years old (32%, compared to 24% among those aged under 26 and 21% among those aged 66+), and those travelling for business or commuting for work (33% and 32% respectively, compared to 25% of those travelling for education and 28% of those travelling for leisure).

TVMs were most often rated fairly or very important for ticket purchase (62%) and printing pre-paid tickets (59%) - reflecting the purposes for which they are most often used.

The stated importance of TVMs varied by region. The ability to purchase and print pre-paid tickets from a TVM was most important to respondents in the South East (75% important to purchase and 66% to print), East of England (65% important to purchase and 60% to print) and London (65% important to purchase and 64% to print). This mirrored stated use in these regions, with respondents in the South East, East of England and London being more likely than those in other regions to say they had used a TVM to purchase train tickets (43%, 30% and 30% respectively).

Groups that may face barriers to digital ticketing

The research showed that those with certain disabilities, those with no internet access on a smartphone or with low digital confidence, and cash reliant respondents would all face barriers to digital ticket purchase.

Disability

Sixteen percent of respondents reported having some form of health condition or illness.

Prevalence of reported disability was highest in the under 26 and 66+ age groups, with 24% of respondents in each group saying they had a health condition or illness.

Those aged under 26 were more likely to report having a condition affecting their mental health, or learning, understanding, or concentrating. Respondents aged 66+ more often reported a condition affecting their mobility, hearing, or dexterity. These differences in age profile had an impact on the ticket purchase methods that were used and preferred.

Those with a condition affecting their hearing or mobility more often stated a preference for ticket office purchase (39% and 35% respectively, compared to 23% among those with no disability). Conversely, those with a condition affecting their mental health were more likely than others to prefer digital purchase methods (64% vs. 55% with no disability).

Internet access and digital confidence

One per cent of the respondents surveyed said that they had no access to the internet either at home or on a smartphone.

The proportion of respondents with no internet access on a smartphone was slightly higher, at 3%.

Among those with internet access, 1% said they do not search for information using websites, 4% said they do not make payments online and 5% said they do not use their phone to download and use apps. For this report, not having internet access on a smartphone, or having access but not making payments online and/or not downloading and using apps are considered to be indicators of low digital confidence. Analysis shows that those with no internet access on a smartphone have similar preferences and behaviour to those that have internet access but do not make online payments or use their phone to download and use apps. This suggests that the group who may experience barriers to digital ticketing goes beyond those who simply don't have internet access.

There is a clear correlation between age and digital confidence. One in eight (13%) of those aged 66+ said they have no access to the internet on a smartphone, compared to an average of 3% among all respondents. Equally, 11% of those aged 66+ that have internet access (at home or on a smartphone) said they did not make payments online (compared to 4% of all with internet access).

Those with no internet access on a smartphone reported much higher levels of preference for using ticket offices than those with internet access on a smartphone (72%, compared to 22% respectively). Trust, availability of staff and accessibility of the station were the important factors here. This group placed less importance on the speed of purchase, price and convenience, with a greater preference for in-person transactions and staff assistance.

Those with no internet access on a smartphone are much more likely than those with internet access to say that staff presence at the station is importance, particularly when it comes to providing support for purchasing tickets (83% compared to 58% respectively) and providing information about fares and ticketing (81% compared to 62% respectively).

Bank account access and cash reliance

Just 3% of respondents reported that they do not have access to a bank account.

Younger respondents are significantly more likely than others to be unbanked. One in five respondents aged 16-17 years old said they do not have an account (20%), compared to just 1% among those aged 46 and over.

A small proportion of respondents (2%) reported that they only make payments using cash, and unbanked respondents were much more likely than those with an account to say they only use cash to make purchases (16% versus 1%).

It is not necessarily the case that these unbanked and cash only groups have no other payment methods available to them - 71% of the cash-only group have a bank account (compared with 97% overall) - however, these characteristics are strong indicators of preference/cash reliance.

Cash only respondents were significantly more likely than others to express a preference for purchasing tickets from a ticket office (66% versus 24% overall). Unbanked

respondents also showed a higher preference for ticket office purchase, but the difference is not as stark (29% vs. 24% overall). It is noted that unbanked respondents may have options other than cash available to them (e.g., pre-paid debit cards).

As seen for those with low digital confidence, cash only respondents were significantly more likely than card users to say that their preference for purchasing tickets in person was the most important factor influencing their ticket purchasing decision (17% versus 4% respectively). Conversely, in-person ticket purchase was not a significant factor for unbanked respondents (3% of this group selected this as the most important factor). This is likely linked to the younger age profile of the unbanked group.

It therefore makes sense that the presence of a ticket office at the station it is of much greater personal importance for those who make cash payments compared to bank card users (75% vs. 56% respectively).

Conversely, cash users were less likely than card users to say that having a TVM at the station they travel is important for ticket purchase (46% vs. 63% respectively).

Children

One fifth of respondents (20%) said that they have children aged between 5 and 18 years old. This increases to 55% for those aged between 41-45 years and 54% for those aged 46-50 years.

Almost 3 in 10 respondents (27%) with children aged between 5 and 18 years indicated that their children do not currently travel by train, while 72% do some form of rail travel. Just over half of respondents with children (56%) said that they purchase their child's train ticket for them.

In cases where children do buy their own tickets, bank cards (8%) and smartphones (7%) are the most used payment methods. Children rarely use cash to pay for their own train tickets (2%).

Response to possible ticket retailing initiatives

Upgrades to Ticket Vending Machines (TVMs)

Respondents were asked to rate their likely use of TVMs if they were:

- Upgraded to offer the full range of tickets currently available at ticket offices
- Upgraded to offer the full range of tickets AND station staff are available to assist in purchasing
- Upgraded to offer audio-visual customer support with ticket purchase or other information/journey planning requirements

Just under half of all respondents (47%) said they would be fairly or very likely to use at least one of the upgraded TVM initiatives. This is slightly higher than the percentage who said they currently use a TVM quite often or regularly for any function (42%). Two fifths

(41%) indicated that they were unlikely to do so, and 5% said that they would not be able to use any of the options.

Two fifths (39%) of all respondents indicated that they would be fairly or very likely to use a TVM to purchase train tickets if it was upgraded to offer the full range of tickets.

Among those aged 66+, likely use of upgraded TVMs was higher with the added benefit of station staff being available to assist (40% vs. 32% without staff assistance). In addition, those who currently prefer to purchase their ticket at a station ticket office were also more likely to use an upgraded TVM with staff assistance (48% vs. 43% without staff assistance).

Respondents aged 66+ were significantly more likely than average to say that they would not be able to use any of the proposed upgrades.

The presence of staff to assist with purchasing has a significant impact on the ability of those with a vision impairment to use TVMs. Without staff assistance, 11% of this group said they would not be able to use an upgraded TVM, this drops to 7% for the option that includes staff assistance (in line with the 6% of respondents overall who said they would not be able to use this option).

Possibility to purchase tickets at an off-station retailer

Overall, likely uptake of an off-station retailer to purchase train tickets was fairly low. Less than one fifth of respondents (17%) said they were likely to buy tickets from an off-station retailer. Six in 10 (59%) said they would be unlikely to do so.

When presented with other locations to buy tickets if the ticket office was not available, other currently available options were most appealing to respondents. Three fifths said they were likely to use a TVM (62%) or purchase from staff at the station (61%). One fifth (21%) said they were likely to purchase tickets from a shop, newsagent, or equivalent retailer at the station.

Off-station options were less appealing, with 17% saying they were likely to purchase from the supermarket where they did their grocery shopping, 14% saying they were likely to use their nearest post office and just 11% of respondents saying they would use a shop, newsagent, or equivalent retailer in the nearest town centre.

Respondents who said they prefer to purchase their tickets from a ticket office were more likely to consider other retailers for their ticket purchase, however they still much preferred at station options - particularly the option to purchase from staff at the station (78%).

Respondents aged 66+ were more likely than others to say they would purchase tickets from the nearest post office (19% said they were fairly or very likely to do so, compared with 14% overall) but least likely to use a shop/newsagent/equivalent in the nearest town centre (9% vs. 11% overall).

Related to age, respondents with a condition affecting their mobility were more likely than those with no disability to say that they would not be able purchase rail tickets at an off-station retailer (8% vs. 4% respectively). Reasons given for not being likely to use off-

station retailers included: inconvenience, loss of customer service/staff expertise and access to journey information.

Availability of Pay As You Go (PAYG)

Half of respondents (52%) indicated they would be likely to use a Pay As You Go option if it was available. Likely uptake is lower when looking at those who have not used PAYG (46%), suggesting that lack of familiarity plays a role.

Respondents that were less likely to use PAYG included: those aged 66+ (30%), cash only respondents (24%), and those with no smartphone internet access (10%) or low digital confidence (for example, among those who do not make online payments, 21% were likely to use PAYG).

Reported likelihood of using PAYG was highest in regions where this option is already available, namely London and the South East. Likely uptake was also higher for more frequent travellers (56% among those who travel weekly) and commuters for either education (57%) or work (55%). Again, familiarity may play a role in whether a rail user feels comfortable using this option.

Unsurprisingly, likely use of PAYG was higher among those who prefer digital or contactless payment methods (55% among those who prefer digital and 73% among those who prefer tap in/tap out).

Frequency of travel also has an impact on likely uptake of PAYG. Over half (56%) of those who travel at least once a week said they are likely to use PAYG, compared to 47% for those who travel less than once a month.

Five per cent of respondents stated that they would not be able to use PAYG if it was available on their journey. This percentage was higher among those aged 66+ (12%), those with no access to the internet on a smartphone (34%), and those who only make cash payments (22%).

Likely uptake of online and digital purchasing options

Respondents were asked to indicate the likelihood that they would use the following options:

- Tickets purchased online/via an app, and available in a digital format
- Tickets purchased online/via an app, and available to collect in a physical format from Ticket Vending Machines
- Tickets purchased online/via an app, and available to collect in a physical format from a Third Party Retailer

Three quarters of respondents (77%) said that they currently use websites and/or apps to purchase tickets. When asked about their likely use of digital purchase methods, a similar proportion (70%) said they are fairly or very likely to purchase online/via an app if the tickets were available in a digital format.

The option to buy tickets digitally and collect a physical ticket from a TVM or third-party retailer was less popular than the option to have tickets available in digital format. Half of all respondents (50%) said they were fairly or very likely to collect a physical format ticket from a TVM, while just over one quarter (27%) said they were fairly or very likely to collect their ticket from a third-party retailer. Half of all respondents (49%) said they were very unlikely to use this third-party option.

Respondents aged 66+ showed the lowest propensity to adopt digital purchasing options. Just four in ten respondents aged 66+ (40%) said they were fairly or very likely to purchase tickets online/via an app for tickets available in digital format. This drops to 15%, if the ticket was available to collect from a third-party retailer.

Conclusions

At an overall level important factors when deciding how to purchase tickets were driven by getting the best price, speed, and convenience. However, for some respondents, a preference for purchasing in person influenced their ticket purchasing behaviour. Trust and familiarity were key reasons for using ticket offices and purchasing from staff on the train.

Older rail passengers (aged 66+) were more likely to prefer to purchase in person, and placed higher importance on using the option they trust, along with the availability of staff assistance.

Those without internet access on a smart phone and cash only users had immediate barriers to using digital and online ticketing options. Therefore, station staff and third-party retailers will factor more highly in their ticket purchase decision.

Those with a condition affecting their vision more often struggled with the use of TVMs so preferred the support of station staff. Conversely, respondents with mental health issues perceived staff interaction as a barrier and tended to prefer online and digital methods. Those under 26 were also more likely to buy their tickets digitally via an app.

Background, objectives, and methodology

Background

The Plan for Rail, published in Spring 2021, outlined a number of initiatives aimed at improving rail fares, ticketing, and retailing of tickets, including:

- Easy, frictionless payment options for every journey
- Digital tickets across the network
- Pay As You Go expanded outside London
- Modernised customer service at stations
- Simplified fares

The Department for Transport (DfT) commissioned independent research agency Savanta to undertake exploratory quantitative research to ascertain how passengers in England are likely to respond to proposed changes to ticket retailing.

The aim of this quantitative research was to build a robust evidence base on rail passenger experiences of ticketing to support policy decisions.

The findings were expected to help increase understanding of current attitudes and behaviours around rail ticket purchasing and the impact any changes are likely to have on respondents' preferences (including use of staff support and ticket offices). The findings were also expected to help segment respondents based on their willingness and ability to adopt new ticketing products such as digital ticketing.

Objectives

The objectives for this quantitative research were to:

1. Explore how rail passengers make ticket buying choices, including the factors that impact their decisions and the weight they attach to these factors. This will build understanding of how rail passengers currently purchase tickets and how this may impact their future behaviour.

2. Explore how vulnerable groups make ticket buying decisions and identify any barriers or potential barriers to rail travel that may exist or be exacerbated by a shift towards digital ticketing. These vulnerable groups include but are not limited to: people that

need to pay by cash, people that do not have a bank account (unbanked), people that have no access to or lack the confidence to use the internet or smartphone, and disabled people.

3. Understand the proportion of rail passengers most likely to be impacted by a shift towards digital ticketing.

4. Identify the common characteristics of those rail passengers that may face barriers to digital ticketing in future.

Methodology

The methodology for this research was designed to achieve as representative a sample of rail users in England as possible, while also ensuring robust coverage of all regions and DfT-contracted Train Operating Companies (TOCs).

An on-train self-completion approach was adopted to ensure robust and representative coverage of all passenger types within the population in England. To further optimise coverage of this audience, additional completion options were made available, including reply-paid envelopes, online (via QR code), telephone, and (exceptionally) fieldworker-assisted completion. The use of reply-paid envelopes for postal returns of the paper-based survey and QR codes for online completion enabled respondents with shorter journeys or insufficient time onboard the train to complete the survey post journey.

Overall approach

It was important that the research methodology was designed to be as inclusive as possible. An on-train self-completion methodology was chosen because:

- It is a well-established approach used within rail research to provide robust and representative samples of rail users.
- By offering paper and pen, digital and the potential for CATI/fieldworker assisted responses, the methodology was inclusive and not biased towards/against certain types of respondents (e.g., those without access to the internet, or those with a visual impairment).
- It allowed for a representative sampling plan to be created that had broad geographic and Train Operating Company coverage. It also allowed for a degree of random stratified sampling to ensure coverage of a random sample of train services covering different times of day, stopping patterns and user types.
- It ensured that passengers invited to complete the survey were boarding at a wide range of stations, to ensure all possible purchasing options were covered (in terms of availability if not actual usage).
- Given the lack of robust, up-to-date passenger profiling data, the on-train approach allowed for an element of on-board counts to be used to identify (and through weighting rectify) any non-response bias within the data (see Weighting section for more details).

Sampling plan: Explanation of the approach taken

The goals of the sampling approach were to:

- obtain a representative sample of respondents in England and ensure broad coverage of DfT-contracted stations
- collect a large enough sample to allow for robust reporting at a TOC and regional level
- collect a sample across different days of the week and times of day, with a mix of morning, evening, and weekend shifts
- collect a sample of sufficient size for robust analysis of key sub-groups including age, disability, payment methods used, bank account access, and internet/smartphone use

Based on the assumption that a six-hour on-train fieldworker shift would yield 50-70 completed questionnaires, it was agreed that a total of 160 shifts would be needed to achieve a minimum of 8,000 completes.

Several steps were then taken to ensure representative England-wide coverage, including the use of journey volume data from the LENNON[1] ticketing and revenue system and consideration of timetables by station and region. After an initial selection of 120 shifts, any TOCs that were under-represented were identified and chosen to make up the remaining 40 shifts. The TOC boost shifts were selected based on defined criteria including, journey volume data from LENNON, number of services operated, complexity of routes covered, and service timings.

Further detail is available in the technical report.

Fieldwork

Fieldwork took place over a period of 5 weeks from 20th February – 26th March 2023 inclusive. During this period, 160 fieldwork shifts were undertaken, each lasting approximately 6 hours, resulting in 8,132 completed questionnaires.

During each shift, fieldworkers were responsible for the distribution of questionnaires to respondents on specific train services determined during the sampling process.

All respondents on sampled train services were asked if they were willing to participate in the research. Respondents were given the option to participate using either a paper self-completion questionnaire that could be completed and handed back to the fieldworker (or returned in a pre-paid envelope), or online using a link provided as a QR code.

[1] The LENNON (Latest Earnings Networked Nationally Over Night) ticketing and revenue system holds information on the vast majority of train tickets purchased in Great Britain and allocates journeys from those ticket sales to TOCs using the mathematical model ORCATS (Operational Research Computerised Allocation of Tickets to Services). A summary of passenger journeys allocated to routes operated by each DfT-contracted TOC averaged over a series of baseline periods between June and October 2022 was used to estimate passenger flows from each station in a typical week.

An option for telephone completion was also provided, though there were no requests for a follow up telephone interview during the fieldwork period.

Ensuring coverage of vulnerable groups

The on-train, non-digital methodology helped ensure a robust sample of all respondents, including those with limited online access, those who typically buy tickets with cash (either through personal choice or because they don't have the ability to pay by card), disabled passengers, and older passengers (aged 66+) who are typically less likely to be online (ONS data on internet use in 2020 shows that 11% of those aged 65-74 and 39% of those aged 75+ had never used the internet, compared to less than 1% in the under-45 age categories). The chosen methodology allowed for the most robust measurement of the size of each of these vulnerable groups, and helped ensure the research was inclusive.

As it is not possible to interview children without parental consent, to incorporate this audience into the sample the questionnaire was structured to ask all parents/guardians of children aged 6-18 a specific question (where applicable) about how their children purchase their train tickets.

Weighting

Scaling weights were calculated by comparing overall proportions of the samples achieved per region with the proportions of operating journeys allocated to each region using LENNON data covering June to October 2022. This adjustment was used to ensure that response rates, routes covering multiple regions and the TOC-led boost shifts did not skew data such that it wasn't representative by region.

A non-response adjustment was also applied to account for differences in the overall profile of respondents observed during fieldwork and the profile achieved in the sample. Fieldworkers used count sheets to record data for respondents who took questionnaires, QR codes and those who refused to participate. Categories recorded were journey purpose (commuter, business, leisure), observed age bracket (under 35, 35-44, 45-64, 65+), and observed gender (male, female). On review, commuter, and business journey purpose counts, and counts for the middle two age categories were each combined into a single category, giving the following categories used in the final adjustment:

- Age: under 35, 35-64, 65+[2]
- Gender: male, female
- Journey purpose: commuter/business, leisure

It is recognised that there is the potential for statistical bias to be introduced through human error when applying this count method, and these counts do not give us a perfect indication of the population profile of respondents. However, there is no other currently available data that would give as accurate a profile of passengers for each TOC, split by age, gender, and journey purpose.

[2] Age categories on the count sheets were slightly different to those in the questionnaire (36-45, 46-65, 66+), which aligned to railcard groupings. This has been noted but as the count sheets were observed, it is unlikely that this discrepancy would have a significant impact on the weighting outcomes.

The final dataset was weighted to reflect these passenger profiles within region, and a combination of the two adjustments (scaling for region journey proportion, and non-response bias adjustment) was achieved using a Random Iterative Method (RIM) weighting algorithm.

Unless stated otherwise, Base Counts shown in this document are based in unweighted figures (and are, therefore, indicative of the actual number of individuals answering a specific question).

Strengths and limitations of the approach

The chosen methodology aimed to minimise non-response bias by providing a range of methods for completing the survey. In this way, most rail passengers on the train services within the sample plan would have had the opportunity to participate in the research and could do so in a way that was most suitable for them. However, the counting exercise highlighted that some groups were underrepresented in the final ‘complete’ dataset.

In line with other research conducted on behalf of DfT (i.e., 'Rail strikes: Understanding the impact on passengers'), lower response rates for those making business journeys and those aged 36-65 were observed. Whilst this is accounted for by weighting the achieved profiles to match those noted during the counting exercise (see technical report for further details), it is possible that there would have been some differences in the responses of those who completed the survey and those who chose not to participate in the research.

The methodology was devised to be representative of passenger journeys. Whilst this is a strength of the research (in that it matches most other data sources available within the rail industry) it does mean that the findings need to be looked at with some level of caution.

An illustration of this is that frequent and infrequent travellers will be included in the research in line with their usage of rail services. For example, where the report refers to 10% of respondents this equates to 10% of passengers travelling at any particular time. As frequent users make more journeys and infrequent users make fewer journeys it will not be representative of users at a population level because frequent users will inevitably be over-represented. This is not a limitation of the research but does need to be borne in mind when interpreting the results. For this reason, the report refers to survey respondents, rather than rail passengers.

The paper-and-pen survey was unable to guide respondents through the questions in the same way that an online survey can. For examples, respondents could skip questions or enter more than one response for a single response question. For this reason, the base sizes differ throughout the report and totals may sometimes sum to more than 100%.

Confidence intervals

The sampling approach means that the result is not a simple random sample, which could only be achieved with a sample frame of every individual who intended to travel by rail during the fieldwork period. To provide a rough indication of how the confidence limits for results vary according to sample sizes and proportions, the table below shows what intervals would apply for a random sample. Due to the sample design, the intervals for this

sample would be consistently a little larger than those shown here (although the exact intervals for this sample method cannot be calculated). Confidence intervals are provided at a 95% confidence level and based on 10%/90%, 30%/70% and 50% of respondents giving a specific response (as indicated in the table below).

Table 1. Confidence intervals

Indicative data cell	Sample size	Confidence interval (to one decimal place)		
		10%/90%	30%/70%	50%
All respondents	8132	+/- 0.7	+/- 1.0	+/- 1.1
50% of sample	4000	+/- 0.9	+/- 1.4	+/- 1.6
25% of sample	2000	+/- 1.3	+/- 2.0	+/- 2.2
Larger region	1500	+/- 1.5	+/- 2.3	+/- 2.5
Smallest region	150	+/- 4.8	+/- 7.3	+/- 8.0

Where differences between proportions are reported to be statistically significant in the report, this is also an indication based on an assumption of randomness in the sample. For this reason, care should be taken in interpreting statistically significant differences since the assumption of randomness is not met.

Demographics of Survey Respondents

The on-train recruitment method adopted for this survey was expected to provide results that are representative of rail journeys in England. The tables below show the demographic profile of respondents.

A large proportion of respondents were in the younger and working-age categories, with a slightly higher proportion of male than female respondents (see weighted base count).

Table 2. Age vs. gender

Age/Gender	Total	Male	Female
16-17	2%	2%	2%
18-25	18%	16%	19%
26-30	10%	10%	10%
31-35	8%	8%	8%
36-40	9%	10%	9%
41-45	10%	10%	10%
46-50	8%	9%	8%
51-55	9%	10%	9%
56-59	6%	6%	7%
60-65	9%	9%	8%
66-70	5%	5%	5%
71-79	4%	4%	4%
80+	1%	1%	1%
Base Count	8,099	3,730	4,172
Base Count (weighted) All respondents, excl. no response	8,099	4,130	3,772
Base % (weighted) All respondents, excl. no response	100%	51%	47%

One in seven respondents (16%) who answered the question described themselves as having some form of health condition or illness. This is slightly lower than the 17.7% observed in the general population of England, which include non-users of rail, as recorded in the 2021 Census[3]. Conditions affecting learning, understanding and concentration, mental health, and social or behavioural aspects were more often reported by those aged under 26. Conversely, those aged 66+ were more likely than others to report having a condition affecting their hearing, mobility or dexterity.

Table 3. Disability vs. age

Disability/Age	Total	Under 26	26-45	46-65	66+
Mental Health	6%	12%	6%	2%	1%
Social or behavioural	3%	8%	3%	1%	1%
Stamina, breathing or fatigue	4%	5%	3%	3%	6%

[3] Disability, England and Wales - Office for National Statistics (ons.gov.uk)

Disability/Age	Total	Under 26	26-45	46-65	66+
Learning, understanding, or concentrating	2%	4%	2%	0%	0%
Vision	1%	2%	1%	1%	3%
Memory	1%	2%	1%	1%	1%
Mobility	3%	1%	2%	3%	10%
Hearing	2%	1%	1%	2%	9%
Dexterity	1%	1%	0%	1%	3%
Other	1%	1%	1%	1%	1%
Prefer not to answer	2%	2%	2%	2%	2%
None	82%	74%	85%	86%	74%
Any	16%	24%	13%	12%	24%
Base Count	7,686	1,863	2,962	2,174	666

It should be noted that sub-group analysis in this report focuses on groups consisting of 100 respondents or more. This means that, due to their low base sizes, results for dexterity and memory are not reported separately.

Among those with any disability, reported use of Passenger Assist was fairly low (4%). However, among those with a condition affecting their mobility, reported use was much higher (at 13%). Compared to other disabled respondents, those with a mental health condition were least likely to have used the Passenger Assist Service (at 1%).

Table 4. Disability vs. Use of Passenger Assist

Disability/Use of Passenger Assist	Yes	No	Don't know	Base Count
Mental Health	1%	97%	2%	440
Social or behavioural	4%	92%	4%	236
Stamina, breathing or fatigue	3%	96%	1%	280
Learning, understanding, or concentrating	3%	93%	4%	133
Vision	8%	86%	6%	104
Memory*	5%	90%	5%	68
Mobility	13%	85%	2%	211
Hearing	7%	89%	4%	137
Dexterity*	18%	81%	2%	63
None	1%	99%	1%	6,032
Any	4%	94%	2%	1,194

* Note low base size

Table 5. Ethnicity

Ethnicity (net values)	Total
White (incl. White minorities)	82%
Asian	8%
Mixed	4%
Black	3%
Other	1%
Prefer not to answer	2%
Base Count	8,041

It is expected that the distribution of rail passengers differs to that of the general population. Indeed, the employment rate among survey respondents is much higher than observed in the general population of adults in England. Seven in ten (71%) stated that they were employed, and more than half (52%) were in full time employment. In the Census 2021, 57% of adults were employed and 35% were in full time employment.

Table 6. Employment status

Employment status (net values)	Total
Employed (incl. self-employed)	71%
Employed (excl. self-employed)	63%
Unemployed/not working	4%
Retired	11%
Studying	11%
Maternity/Looking after home	1%
Full-time carer	0.4%
None of these/prefer not to answer	5%
Base Count	7,811

Table 7. Gross annual household income

Income	Total
Under £5,000	3%
£5,001-£10,000	2%
£10,001-£20,000	5%
£20,001-£30,000	9%
£30,001-£40,000	7%
£40,001-£50,000	8%
£50,001-£75,000	12%
£75,001-£100,000	9%
Over £100,000	15%
Prefer not to answer	28%
Base Count	7,671

Table 8. Region where respondent lives

Region	Total
Northern Ireland	0.2%
Scotland	1%
North West	6%
North East	2%
Yorkshire and Humberside	5%
Wales	1%
West Midlands	6%
East Midlands	6%
South West	10%
South East	27%
East of England	9%

Region	Total
London	20%
Other	3%
Prefer not to answer	3%
Base Count	7,791

The survey captured passengers on DfT-contracted train services. The region where a respondent lives may not necessarily reflect the region in which the fieldwork took place.

Details of today's journey

Participants were asked to provide details of the train journey they were undertaking when approached to take part in the survey.

Commuting to/from work was the single most common purpose (32%) but, when combined, leisure trips accounted for 44% of journeys.

Table 9. Purpose of today's journey

Journey purpose	Total
Leisure	**44%**
- Visiting friends or relatives	19%
- Travelling to/from holiday	5%
- Shopping trip	3%
- Travelling to watch sport	2%
- Travelling to play sport	1%
- Travelling whilst on holiday	1%
- Other leisure trip	14%
Commuting to/from work	**32%**
Commuting for education	**8%**
- Commuting for education	8%
- Escorting a dependent for education or other purpose	1%
Company business	**9%**
Travelling to a health appointment (GP, hospital, dentist etc.)	**2%**
Other personal business (job interview, banking etc.)	**4%**
Other	1%
Base Count	8,072

Just under half of respondents (48%) used a digital method of ticket purchase for today's journey, whilst a third (33%) purchased their ticket at the station or on a train.

Table 10. Ticket purchase method for today's journey

Place of purchase	Total
At a station ticket office	20%
At a TVM (Ticket Vending Machine)	12%
At a TVM (Ticket Vending Machine), with assistance	0.3%
Online (from the train company's website)	13%
Online (from another website)	10%
Mobile app from the train company	12%
Another mobile app	13%

Place of purchase	Total
Over the phone, from the Train Company	1%
Over the phone, from a third-party vendor	1%
Via a Travel Agent/Travel Management company	2%
Tap in/tap out using contactless smartcard (e.g., Oyster)	4%
Tap in/tap out using contactless bank card	6%
From a conductor /on the train	1%
From mobile staff at the station	0.1%
I used Passenger Assist	0.2%
N/A Someone else bought the ticket for me	2%
Other	2%
Base Count	8,061

The majority of respondents (85%) used a bank card to pay for today's journey, by far the most common means of payment. Just 5% had used cash.

Table 11. Payment method for today's journey

Payment method	Total
Cash	5%
Credit/debit card	63%
Bank card on mobile phone (e.g., Apple pay, Google pay)	20%
Tap in/tap out using a bank card	2%
Tap in/tap out using a smartcard (e.g., Oyster, 'the key smart card')	2%
The ticket was free	1%
Someone else paid	3%
National Rail Travel Vouchers	0.1%
Other	2%
Don't know	0.3%
Base Count	7,870

The orange cardboard ticket format was widely used. Two fifths (40%) of the respondents surveyed said that this was the format of the ticket they were using for their current journey. A similar proportion (37%) were using a barcode/QR code on their smartphone.

Table 12. Ticket format for today's journey

Ticket format	Total
Orange cardboard ticket/ticket by post	40%
Ticket printed at home	2%
Ticket as barcode/QR code on smartphone	37%
Ticket on a smartcard	5%
Contactless bank card	4%
Contactless mobile payment	4%
Contactless pre-paid card	3%
Other	3%
Don't know	1%
Base Count	8,019

One third of respondents (32%) were travelling on an anytime/standard/peak ticket. A similar proportion (36%) were travelling on an off-peak/super off-peak ticket. Around one in twelve (8%) had an advance ticket.

Table 13. Ticket type for today's journey

Ticket type	Total
Anytime/ Standard/ Peak Single/ Return	32%
Off-Peak/ Super Off-Peak Single/ Return	36%
Advance	8%
Day Travelcard	4%
Pay As You Go Smartcard	3%
Contactless bank card	6%
Weekly Season Ticket	1%
Monthly Season Ticket	2%
Annual Season Ticket	2%
Flexible Season Ticket	1%
Special promotion ticket (e.g., rover ticket)	0.2%
Other	2%
Don't know	2%
Base Count	8,034

Glossary of terms

Term	Defined as
Disabled / Any disability	Those self-reporting any health condition or illness - this includes vision, hearing, mobility, dexterity, learning/understanding/concentration, memory, mental health, stamina/breathing, social/behavioural conditions or illnesses
Any internet access	Includes those who have internet access at home and on a smartphone, at home only or on a smartphone only
No internet access	Those who have no internet access either at home or on a smartphone
Smartphone internet access	Those who have internet access on a smartphone
No smartphone internet access	Those who do not have internet access on a smartphone
Digitally confident/ digital confidence	Respondents with access to the internet, and who make payments online and/or download and use apps
Less digitally confident/ lower digital confidence	Respondents with access to the internet, but do NOT make payments online and/or do NOT download and use apps
Cash only	Defined as those who only use cash and no other method (e.g., debit/credit card) to make payments
Unbanked	Those who do not have access to a bank, building society, post office or credit union account
Ticket purchase - digital	Those who purchase tickets online from the train company's website, another website, a mobile app from the train company or another mobile app
Ticket purchase – Tap in/tap out	Those who tap in/tap out to purchase tickets using a contactless smartcard (e.g., Oyster) or a bank card
Ticket purchase – TVM	Those who purchase tickets at a TVM (Ticket Vending Machine) or at a TVM with assistance
Third party retailer	Any retailer, including retailers located at a train station (e.g., a shop or café)
Off station retailer	A retailer located in a location other than the train station (e.g., in the town centre)

1. Ticket purchasing behaviour and preferences among rail passengers

Chapter overview

This chapter explores the current ticket purchasing behaviour and preferences of respondents in terms of their preferred ticket purchase methods, payment methods used in the 6 months prior to completing the survey, current use of websites/apps, and use of and preference for the different ticket fulfilment options. Where relevant, significant differences by age, gender, region, and household income are included. The ticket purchasing behaviour and preferences of disabled, non-digital, unbanked, and cash-reliant respondents are covered in more detail in Chapter 3.

Preferred ticket purchasing methods

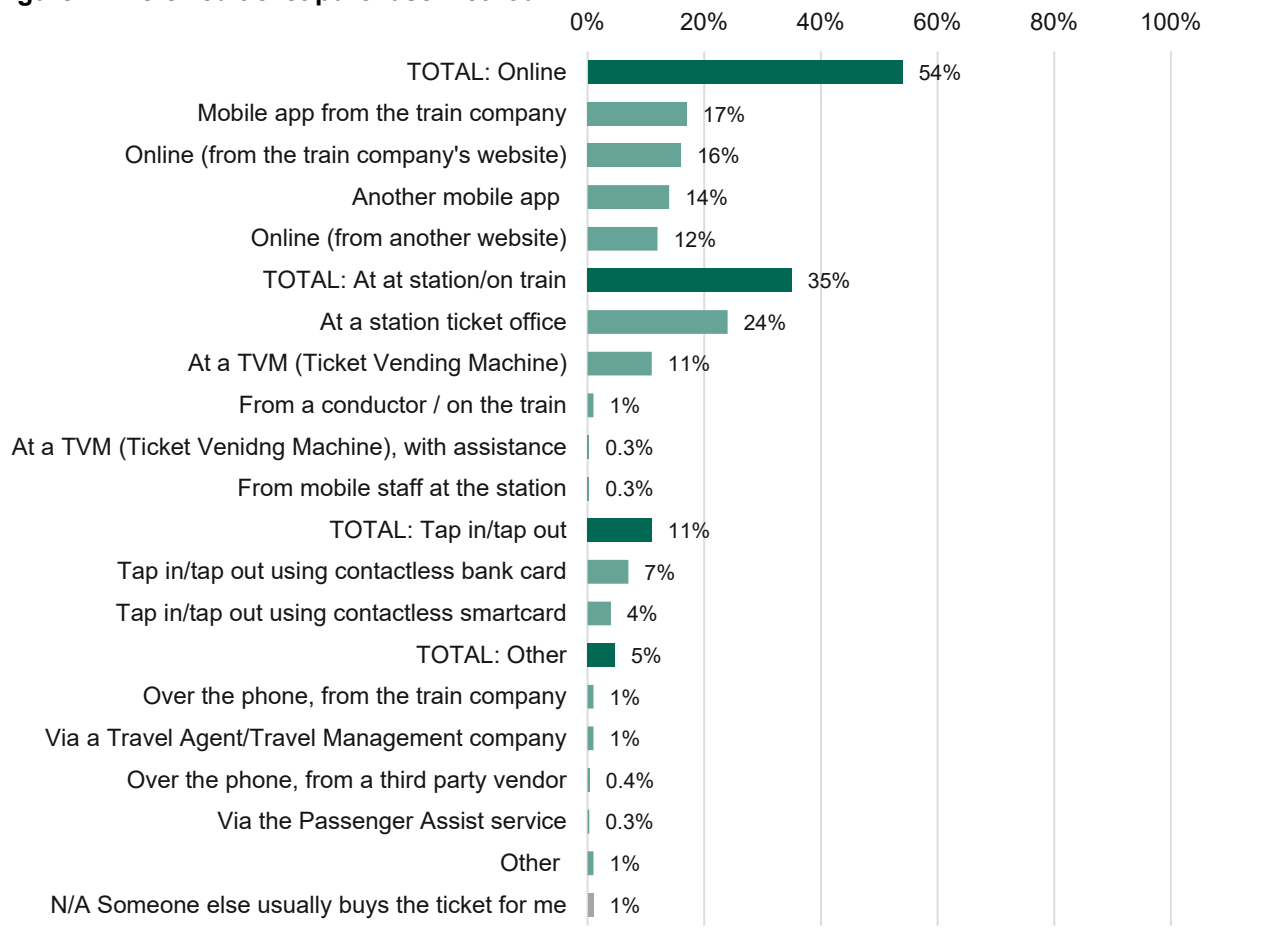
How do rail passengers prefer to purchase their tickets?

One quarter of respondents (24%) said that they prefer to purchase tickets from a ticket office, and one in ten (11%) stated a preference for using Ticket Vending Machines (TVMs).

One in ten (11%) said that they prefer to use tap in/tap out (using a bank card or smartcard). However, it should be noted that this option was not available across the whole rail network at the time of the research, so not all respondents would have been familiar with it. Regional differences are discussed in more detail later in this section.

Over half of respondents (54%) reported a preference for purchasing tickets online, via a website or mobile app. There was no clear favourite among the online methods, with websites preferred by 26% of respondents and apps preferred by 30%.

Figure 1. Preferred ticket purchase method[4]



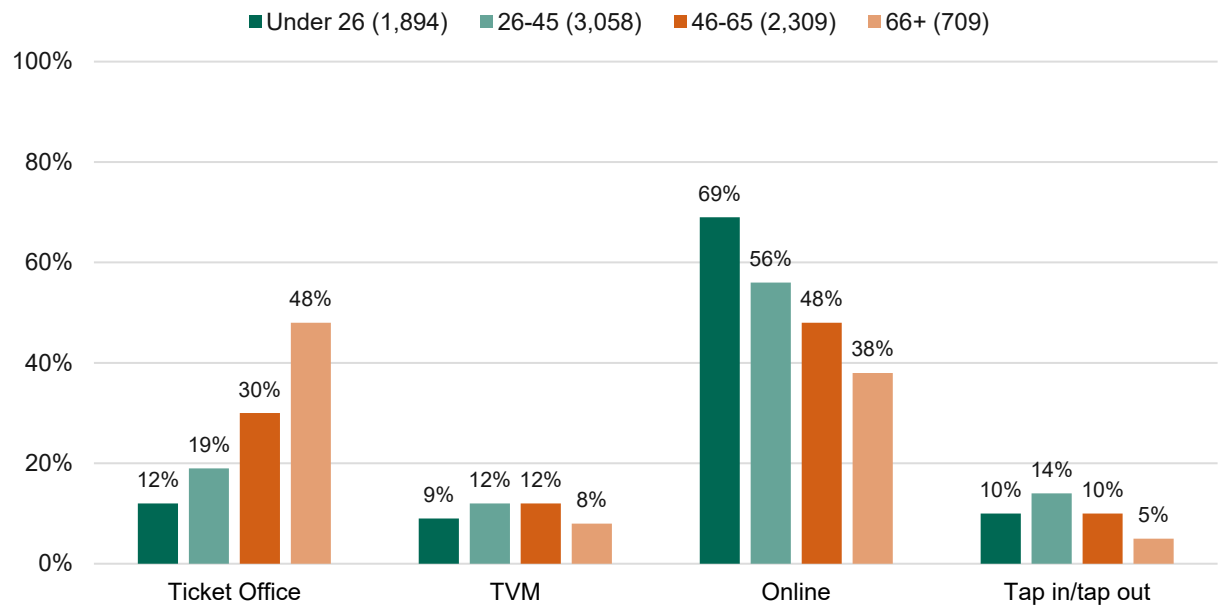
D2. Which is your preferred ticket purchase method? Base: All respondents, excl. no response (8,001)

A direct correlation can be seen between age and preferred ticket purchase method. As shown in Figure 2, preference for purchasing tickets at a ticket office was highest among

[4] In the paper questionnaire, some respondents selected more than one preference. For this reason, the sum of the individual variables is sometimes greater than the 'TOTAL' of these variables.

those aged 66+, with nearly half (48%) selecting this as their preferred purchase method, compared to 12% of those aged under 26. Seven in ten of those aged under 26 (69%) said that they prefer to buy their train tickets online, compared to around four in ten (38%) of those aged 66+.

Figure 2. Most preferred ticket purchase method, by age



D2. Which is your preferred ticket purchase method? Base: All respondents, excl. no response (8,001)

Preference for tap in/tap out was highest among those aged 26-45 (14%). It is likely that this is related to journey purpose as this group was most likely to say that their journey purpose at the time of being surveyed was commuting to/from work (43%, compared 19% of under 26s, 34% of 46-65s and 7% of those aged 66+).

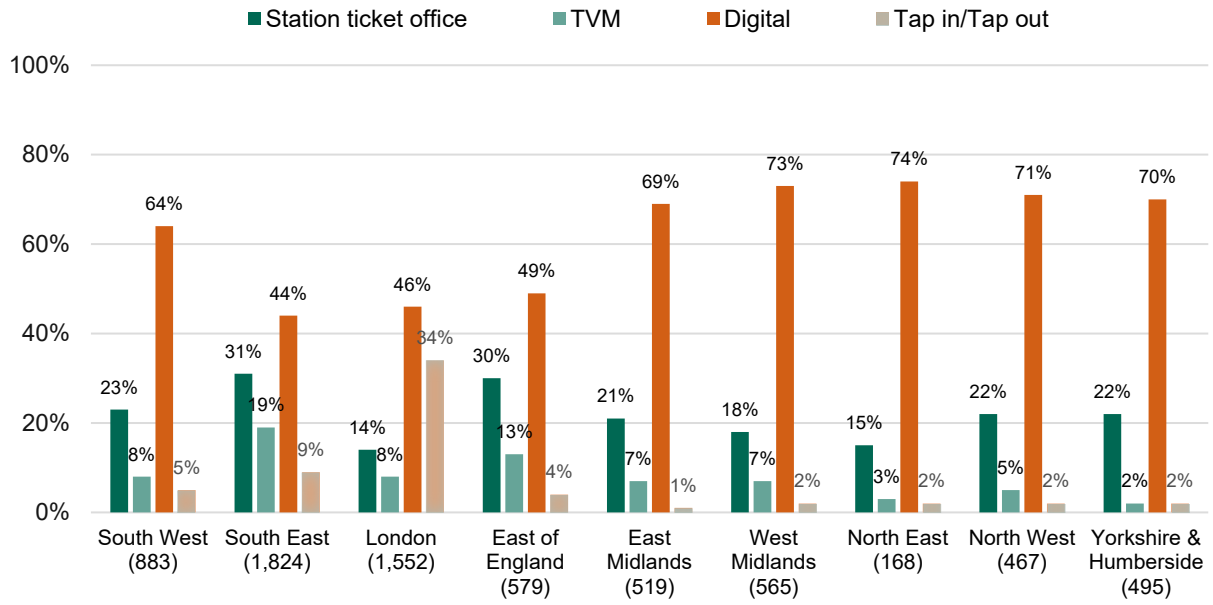
Male and female respondents are equally likely to state a preference for purchasing train tickets from a station ticket office (25% and 23% respectively). However, male respondents are more likely than female respondents to say that they prefer to purchase their tickets at a TVM (13% vs. 9% respectively), while females are more likely than males to prefer to purchase their tickets online (57% vs. 51% respectively).

As shown in Figure 3, some regional differences were also present. Respondents in the South East and East of England were more likely than other regions to express a preference for purchasing tickets at the station ticket office (31% and 30% respectively, compared with 14-23% in other regions) and for using TVMs (19% and 13% respectively, compared with 2-8% in other regions).

In contrast, those in the North, Yorkshire and Humberside and the Midlands showed a comparatively high level of preference for digital payment methods, with the highest level seen in the North East (74%, compared to 44-49% in the South East, London and East of England). This difference may be related to the availability of TfL's Pay As You Go systems (contactless bank card/Oyster), with those in the Greater London area tending to use this, rather than engaging with websites/apps.

Stated preference for tap in/tap out payment methods tended to reflect where this option is currently available, with respondents in London significantly more likely to prefer tap in/tap out than any other region (34% compared to 1-9% in other regions). This suggests that first-hand experience of a particular payment method tends to increase its popularity.

Figure 3. Most preferred ticket purchase methods, by region where respondent lives



D2. Which is your preferred ticket purchase method? Base: All respondents, excl. no response (8,001)

What are the reasons for ticket purchase preferences?

Getting the best priced ticket (46%), using the quickest option (34%) and ease/convenience (22%) were the most important factors respondents considered when deciding how to purchase their tickets. These are the top three most important factors, regardless of preferred ticket purchase method, as shown in Table 13.

A preference for purchasing tickets using cash or card is rarely most important when deciding how to purchase train tickets (each cited as most important by 1% of respondents).

As shown in Table 14, those who said they prefer to purchase tickets at a station ticket office are more likely than those who express a preference for other purchase methods to place importance on trust (11%), purchasing tickets in-person (14%), staff assistance (6%) and cash use (2%).

Table 14. Most important factor when deciding how to purchase tickets, by preferred ticket purchase method*

	Total	Preference for Ticket Office	Preference for TVM	Preference for Digital	Preference for Tap in/tap out
Getting the best price ticket	46%	36%	39%	56%	38%
Using the quickest option	34%	34%	42%	31%	45%
Using the easiest /most convenient option	22%	17%	27%	25%	26%
Using the option I trust	6%	11%	6%	6%	5%

Preference for purchasing tickets digitally	5%	1%	1%	8%	2%
Preference for purchasing tickets in person	4%	14%	3%	1%	1%
Habit - I always like to purchase my ticket in the same way	3%	3%	4%	3%	4%
Availability of assistance from staff	2%	6%	0.4%	0.4%	0.4%
Preference for using a bank card	1%	1%	1%	1%	5%
Accessibility of the station	1%	2%	1%	1%	1%
Preference for using cash where possible	1%	2%	1%	0.2%	0.3%
I do not know any other ways of purchasing tickets	0.2%	0.2%	0.1%	0.0%	0.5%
Other	1%	1%	0.4%	0.3%	1%
Don't know	1%	0.3%	0.3%	0.3%	0.4%
Base	7,906	1,774	791	4,567	876

D3. Overall, what is most important to you when deciding how to purchase your ticket (regardless of journey type)? Base: Respondents who purchase their own ticket, excl. no response (7,906) * Responses sum to more than 100% because some respondents selected more than one option as 'most important'.

Respondents who travel regularly were more likely than infrequent travellers to say speed of purchase is most important when purchasing tickets. One in three respondents travelling at least once a week selected 'using the quickest option' as most important (36%, compared to 29% of respondents who said they travel less than once a month). It is likely that those who travel regularly are making repeat journeys (e.g., commuters) and have more experience of and confidence in purchasing tickets. For this group, efficiency is more important than staff support.

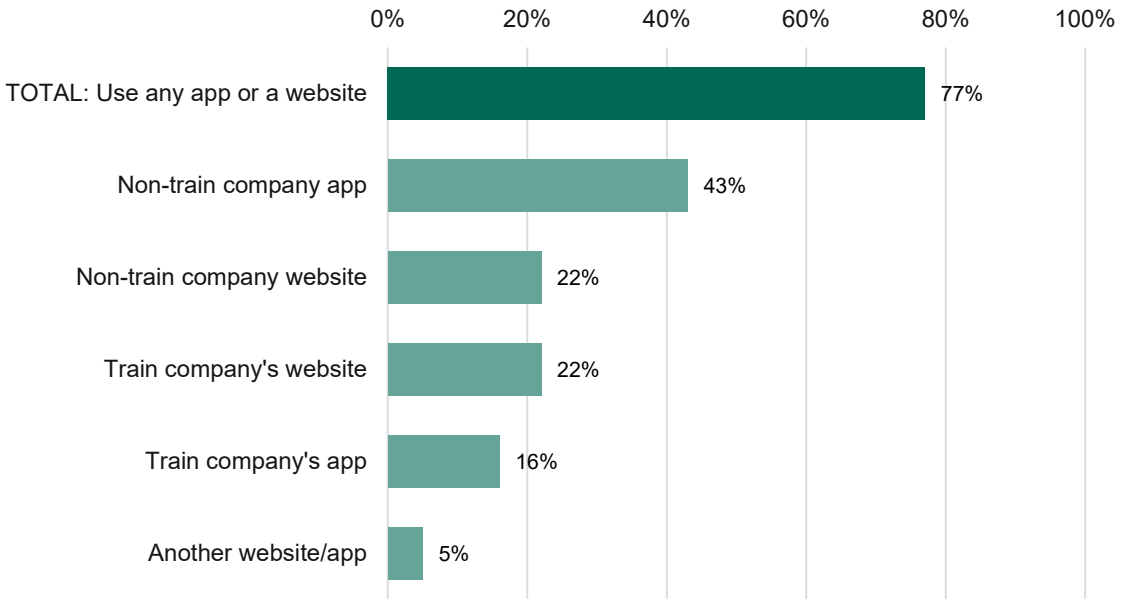
For those who travel less than once a month, 'getting the best price ticket' was more important (51% versus 44% who travel at least once a week). Lack of familiarity and experience are likely to play a role in this group's purchasing preferences.

Age also influences what is important to respondents when purchasing train tickets. For those aged 66+, using the quickest option had less importance than for the other age groups (18% selected this as most important, compared to 39% for under 26s, 39% for 26-45 and 29% for 46-65). These older respondents were more likely to prefer to purchase tickets in person (12% vs. 2% for under 26s, 2% for 26-45 and 5% for 46-65), more likely to consider the availability of assistance from staff (5% vs. <1% for under 26s, 1% for 26-45, and 2% for 46-65) and more likely to consider the accessibility of the station (3% vs. 1% for the each of the other age groups).

Who currently uses website/apps to purchase train tickets?

Respondents were asked 'Which of these websites/apps do you currently use when purchasing rail tickets?' and presented with the options listed in Figure 4. Regardless of their preferred ticket purchasing method, over three quarters (77%) of respondents said that they currently use a website or app to purchase their train tickets.

Figure 4. Use of websites/apps for ticket purchase



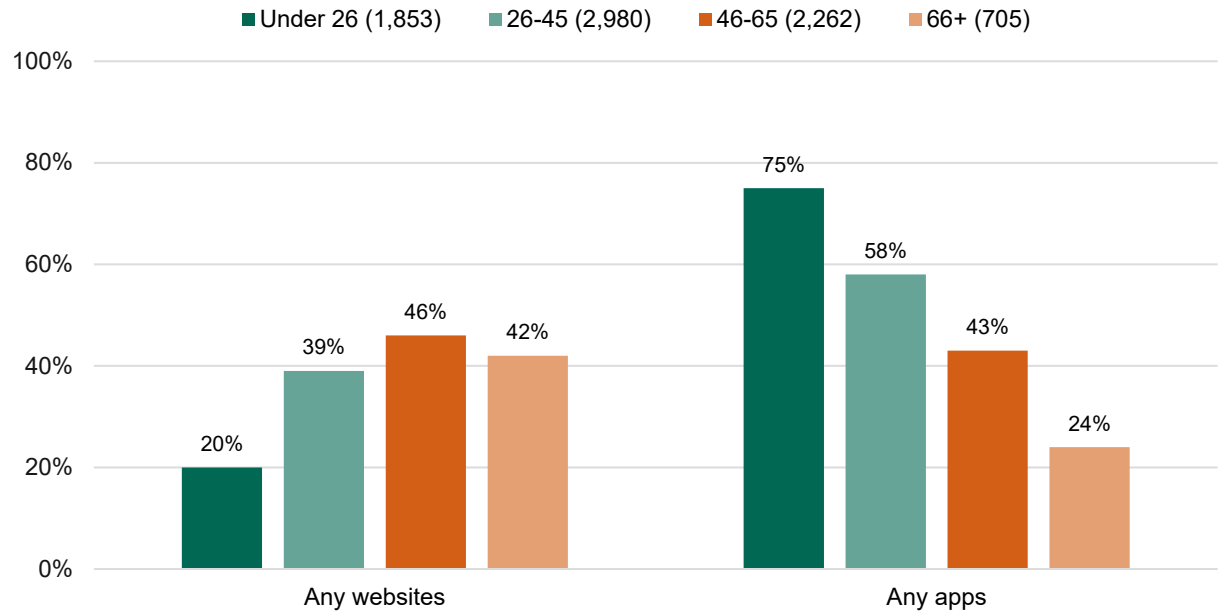
D8. Which of these websites/apps do you currently use when purchasing train tickets? Base: Respondents who purchase their own tickets, excl. no response (7,828)

Among those who said they currently use a website or app to purchase their train tickets, 72% cited this as their preferred ticket purchase method. Around one in seven (14%) of those who currently use websites/apps said they prefer to purchase their ticket at the station ticket office and 8% cited a preference for TVM purchase.

There is a correlation between age and the use of websites and apps to purchase train tickets. Eighty six percent (86%) of those under 26 said that they currently use a website or app to purchase their tickets, compared to 80% for the 26-45 age group, 73% for the 46-65 years and 59% for those aged 66+.

However, as shown in Figure 5, the differences by age are different for app use, compared to website use. Use of an app to purchase train tickets significantly declines as age increases - from 75% for those aged under 26 years old to 24% for the 66+ age group. Conversely, use of a website to purchase train tickets was lower among those aged under 26 than any other age group.

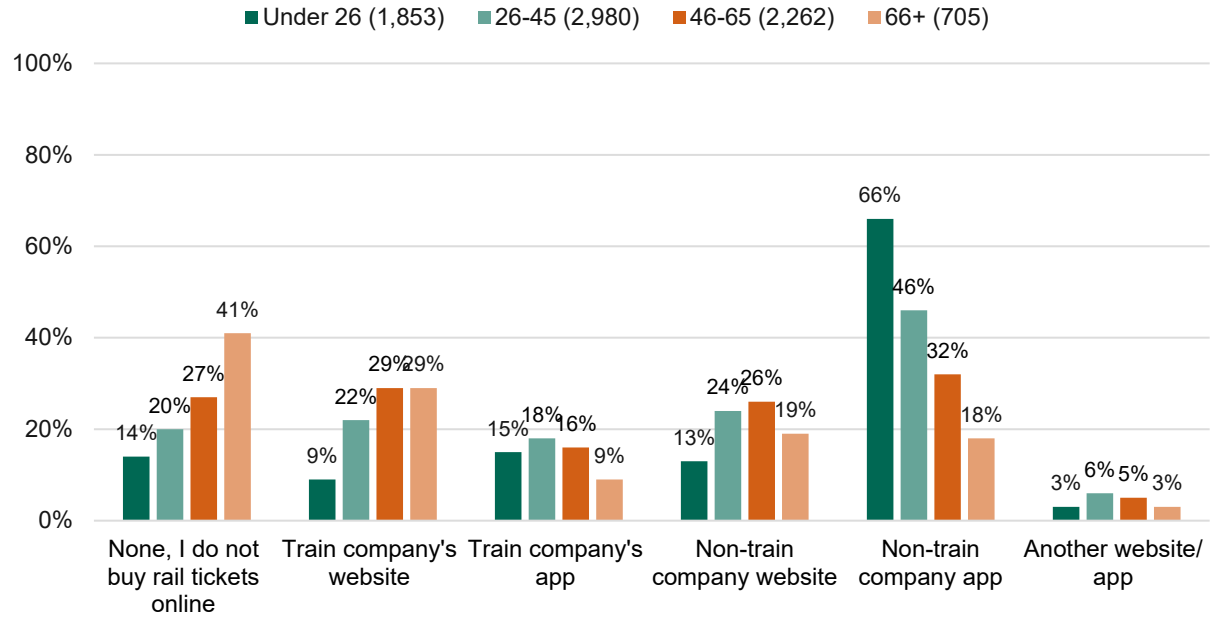
Figure 5. Use of websites vs. apps for ticket purchase, by age



D8. Which of these websites/apps do you currently use when purchasing train tickets? Base: Respondents who purchase their own tickets, excl. no response (7,828)

A non-train company app was particularly popular amongst those aged under 26 years old (used by 66% of this age group, compared to 46% for 26-45, 32% for 46-65 and 18% for 66+).

Figure 6. Use of websites/apps for ticket purchase, by age

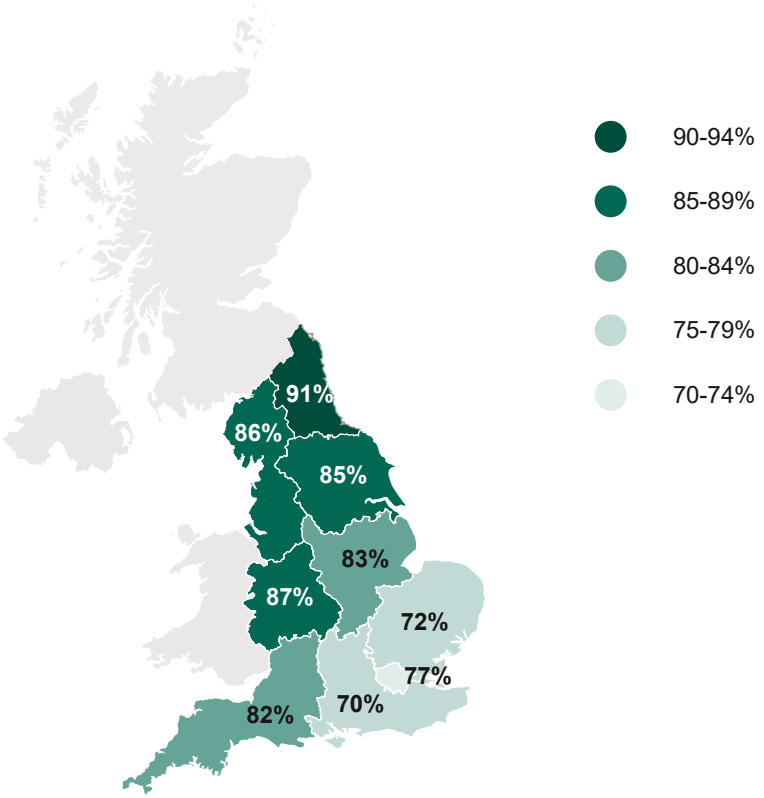


D8. Which of these websites/apps do you currently use when purchasing train tickets? Base: Respondents who purchase their own tickets, excl. no response (7,828)

Female passengers were more likely than male passengers to say that they use a non-train company app for ticket purchase (46% vs. 40% respectively). Males are more likely than females to use the train company's website (23% vs. 21% respectively) or another website (5% vs. 4% respectively).

There are also regional differences, with use of websites/apps being highest in the North East (91%), and lowest in the South East (70%). This pattern reflects the levels of ticket office preference in these regions, which is significantly higher in the South East than the North East. Again, the availability of PAYG systems and non-app related smartcards in the Greater London area may be contributing to these differences.

Figure 7. Use of websites/apps for ticket purchase, by region where respondent lives

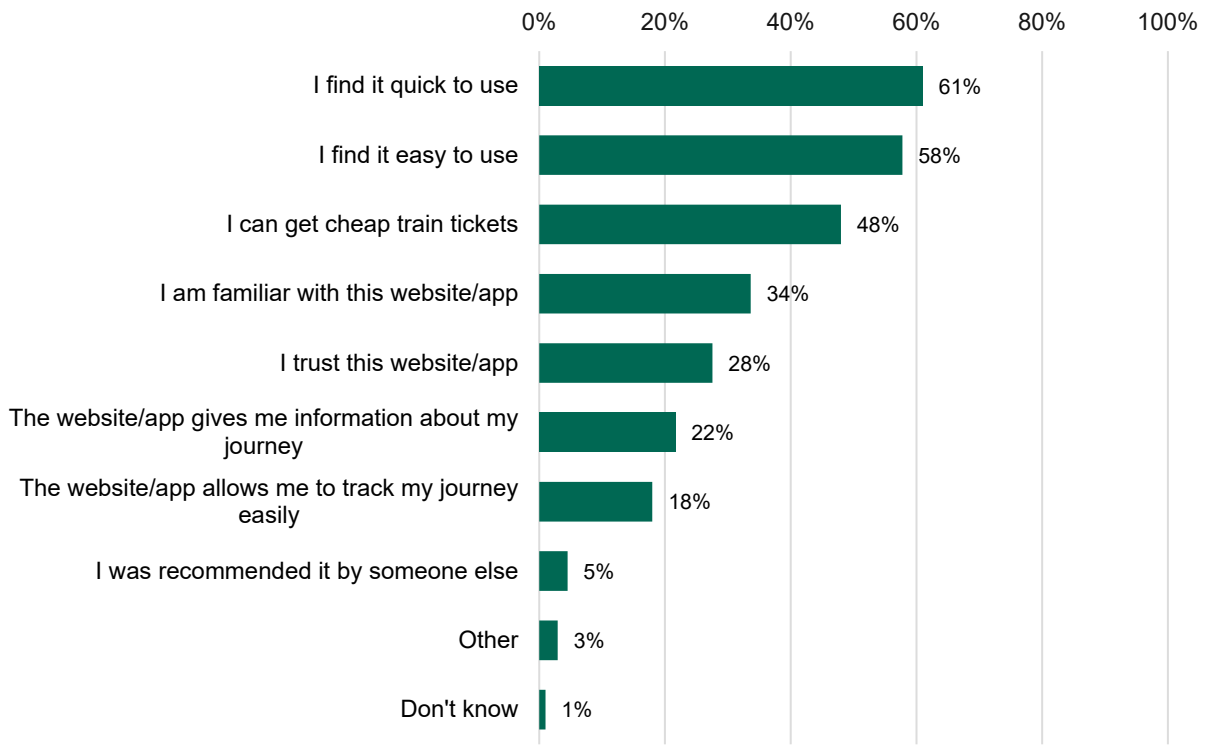


D8. Which of these websites/apps do you currently use when purchasing train tickets? Base: Respondents who purchase their own tickets, excl. no response (7,828)

Why are websites/apps used to purchase train tickets?

Speed of use (61%), ease of use (58%) and getting cheap train tickets (48%) are the most commonly selected reasons for using a website and/or app for ticket purchase.

Figure 8. Reasons for using websites/apps to purchase train tickets



D9. And why do you use the websites/apps chosen in D8? Please select all that apply. Base: Those who use websites/apps when purchasing train tickets, excl. no response (6,114)

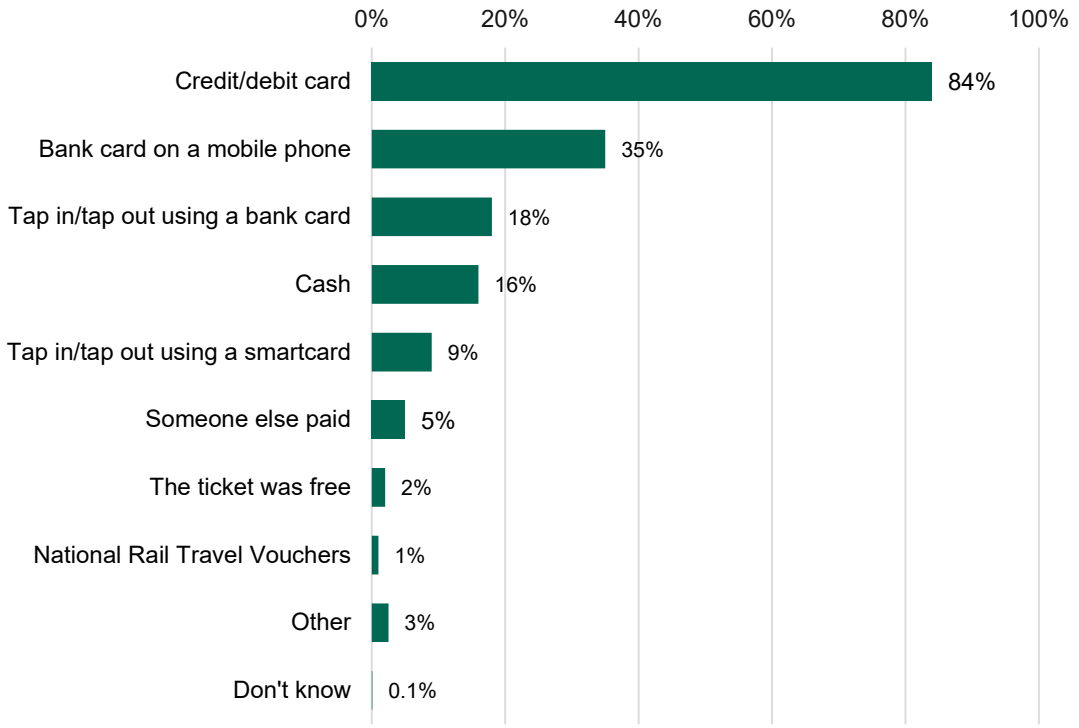
Younger respondents (aged 45 and under) were more likely than older respondents (aged 46+) to cite 'quick to use' and 'easy to use' as reasons for purchasing tickets via a website or app. Seven in ten (70%) of those aged under 26 and 63% of those aged 26-45 said they used websites/apps because they found them 'quick to use', compared to 56% of those aged 46-65 and 42% of those aged 66+. Similarly, 67% of those aged under 26 and 59% of those aged 26-45 said they use websites/apps because they are 'easy to use', compared with 52% of those aged 46-65 and 50% of those aged 66+.

Ticket payment methods

How do rail passengers currently pay for their tickets?

The majority (95%) of respondents said they have used at least one form of bank card transaction (credit/debit card or bank card on a mobile phone) to purchase train tickets in the last six months. More than four in five respondents (84%) said they have used a credit or debit card to pay for their train tickets in the last six months, and around one third (35%) have used a bank card on a mobile phone. Around one in six (16%) have used cash to purchase train tickets in the last 6 months.

Figure 9. Payment methods used to purchase train tickets in last 6 months



D5. Which of the following payment methods have you used to purchase train tickets in the last 6 months? Base: Respondents who purchase their own ticket, excl. no response (8,010)

Respondents aged 16-17 years old and those aged 66+ were more likely than other age groups to have used cash to purchase train tickets in the last six months (29% and 22% respectively, compared to 13% of those aged 18-25, 14% of those aged 26-45 and 16% of those aged 46-65).

Reported cash purchase was higher among male respondents than female respondents (18% vs. 13% respectively). Female respondents more often reported using any bank card transaction (96% vs.94% of males).

Household income also plays a role in the use of cash to purchase train tickets. Respondents with an income of £30,000 or under were more likely than those with an income of over £30,000 to have used cash for this purpose in the last six months (20% vs. 12% respectively).

Those who had not used a bank card to purchase train tickets in the last six months were asked why this was. A preference for cash, ease, security and the ability to manage their spending were amongst the most cited reasons.

What are the reasons for not using a bank card?

- **Prefer cash (47 mentions):** “I prefer to use cash, I put my leisure money to one side each week.”, “I always prefer to pay by cash at a ticket machine or on the train. I like to know people still will have a job.”, "Prefer to use cash, don't trust machines to get it right every time.", "Prefer cash, so that the bank doesn't know my personal business.", "I prefer buying with cash at the ticket office, where I can speak to staff."
- **Employer/Company pays (26 mentions):** “Season ticket through employer.”, "Mandatory company travel agent books tickets and assigns to job code.", "Work travel card, taken from salary monthly.", "I usually travel via train on business - this is paid for on company account.", "Company purchase my seasonal travel card for me".
- **Easier/Quicker (23 mentions):** "It is easier to purchase a train ticket on my mobile, less hassle for me.", "Easier to use cash", "Had cash to use.", "Card linked in the mobile app so easiest way.", "Pay as you go takes from card automatically."
- **Use an Oyster card (16 mentions):** “Oyster is easier for me to control spending.”, "I have an Oyster 60+ card for London travel and it's free.", "I have an annual ticket on my Oyster card, so I don’t need to purchase any other tickets", "Easier to use Oyster to keep track of spending."
- **Prefer PayPal (14 mentions):** “I use PayPal as it's quicker and easier.” "Prefer to use PayPal on mobile app.", "Use PayPal as it's safer.", "I use PayPal, which is attached to my bank card, but it gives an extra layer of security"

D6. If you have not used a bank card to purchase a train ticket (either on its own or via a mobile phone/contactless) - please tell us why in the box below. Base: Respondents who have not used a bank card to purchase a train ticket, excl. no response (260)

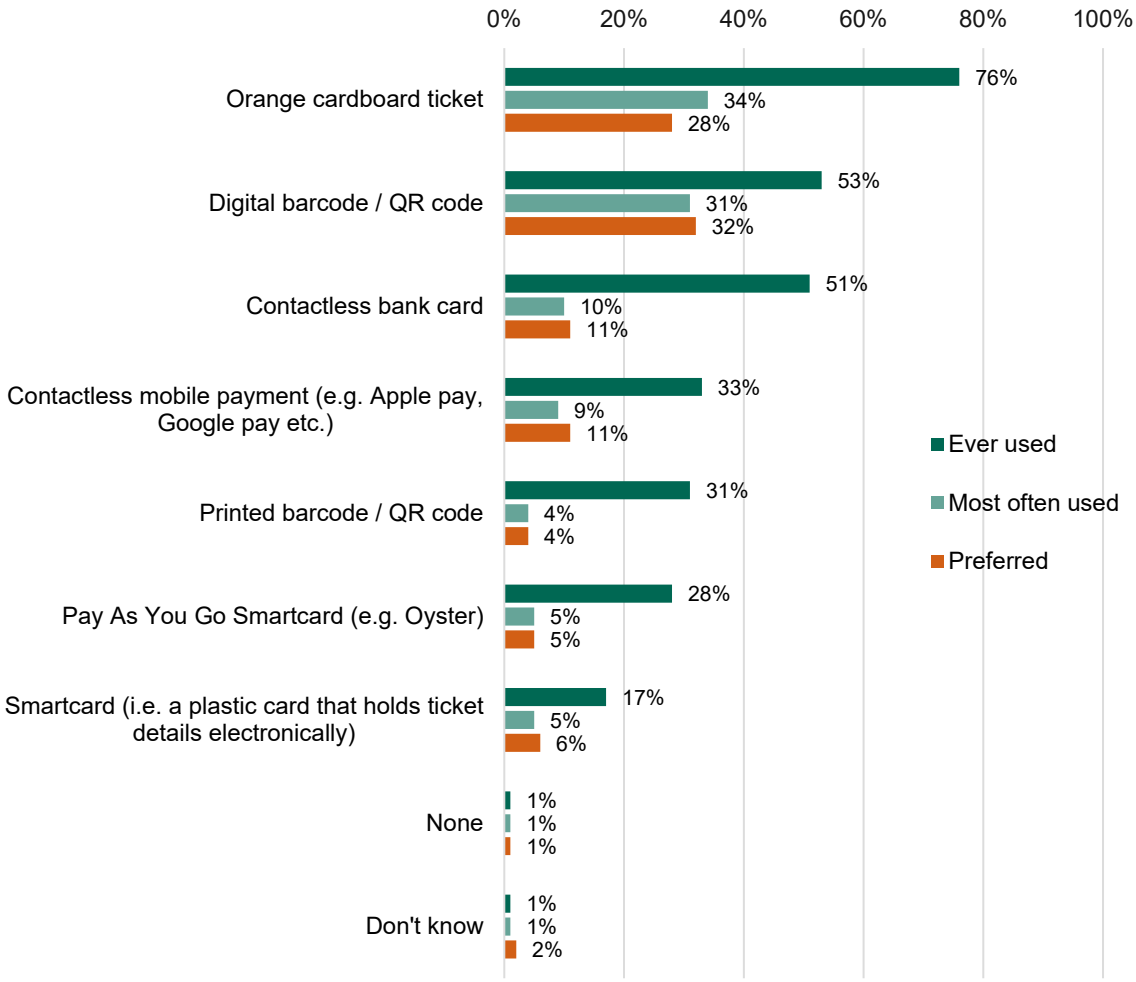
Ticket fulfilment options

Which ticket fulfilment options do rail passengers use and prefer?

As shown in Figure 10, three quarters of respondents (76%) said they have used an orange cardboard ticket at some point, while just over half (53%) said they have used a digital barcode/QR code or contactless barcode. Looking at the option used most often, this gap closes, with the orange cardboard ticket only slightly ahead of digital barcode/QR code, at 34% and 31% respectively.

Preferred ticket fulfilment options closely reflect those that are most used. However, digital barcode/QR code is slightly ahead of the orange cardboard ticket, at 32% and 28% respectively.

Figure 10. Ticket fulfilment options used: ever used, most used, preferred



D10. Which have you ever used? - Please select all that apply. Base: All respondents, excl. no response (8,044) D11. Which one do you use most often? - Please only select one option. Base: All respondents, excl. no response (7,463) D12. Which one is your preferred option? - Please select one option. Base: All respondents, excl. no response (7,467)

Frequency of travel has an impact on preference. Respondents who reported they have travelled at least once a week in the last 6 months have a lower preference for orange cardboard tickets (24%) than those who reported they travel once a month (31%) or less frequently than this (34%).

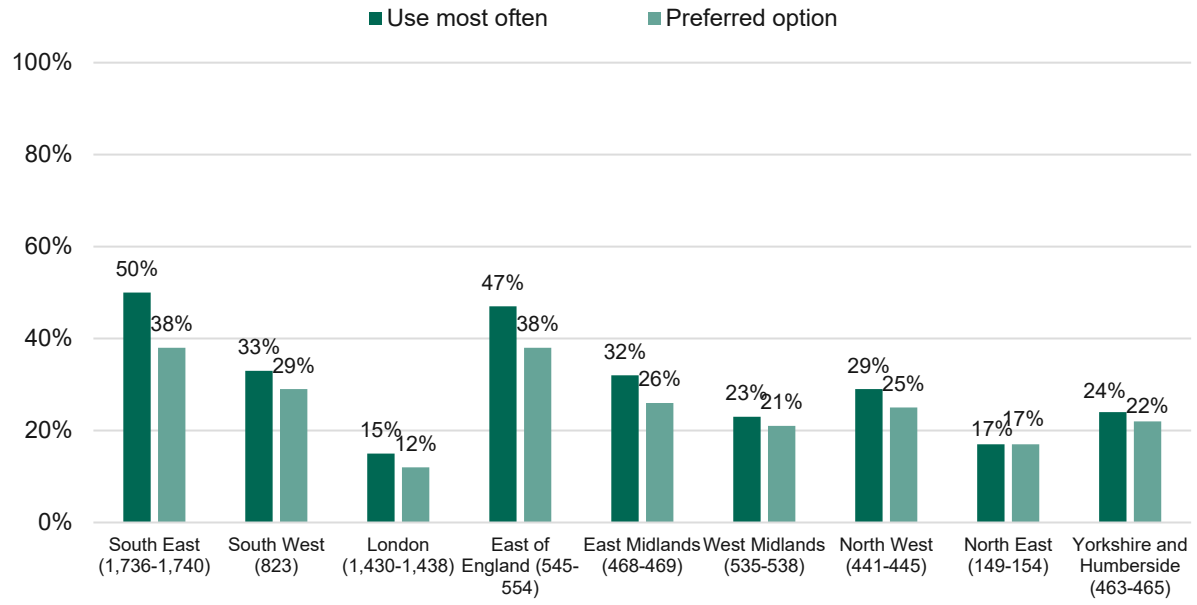
Linked to frequency of travel, orange cardboard tickets are preferred by older respondents, with just over half (52%) of those aged 66+ favouring this format, compared to just 15% of the under 26 age group, 22% of those aged 26-45 and 36% of those aged 46-65.

Preference for orange cardboard tickets is higher among male respondents than female respondents (30% vs. 26% respectively). Females are more likely to prefer digital barcode/QR code (35% vs. 30% of males).

Looking specifically at the use of and preference for orange cardboard tickets, some clear regional differences can be seen. Respondents in the South East and East of England were most likely to say they use and prefer orange cardboard tickets (with 50% and 47% respectively saying they use these most often, and 38% in both areas saying they were their preferred option). London and the North East have the lowest levels of use and preference (15% and 17% respectively said they use this most often, and 12% and 17% respectively said this is their preferred option). One possible explanation for this is that

orange cardboard tickets can be used to travel across London (via Transport for London), something that would likely be of more value to those living in and/or travelling from the areas around London.

Figure 11. Orange cardboard ticket use and preference, by region where respondent lives

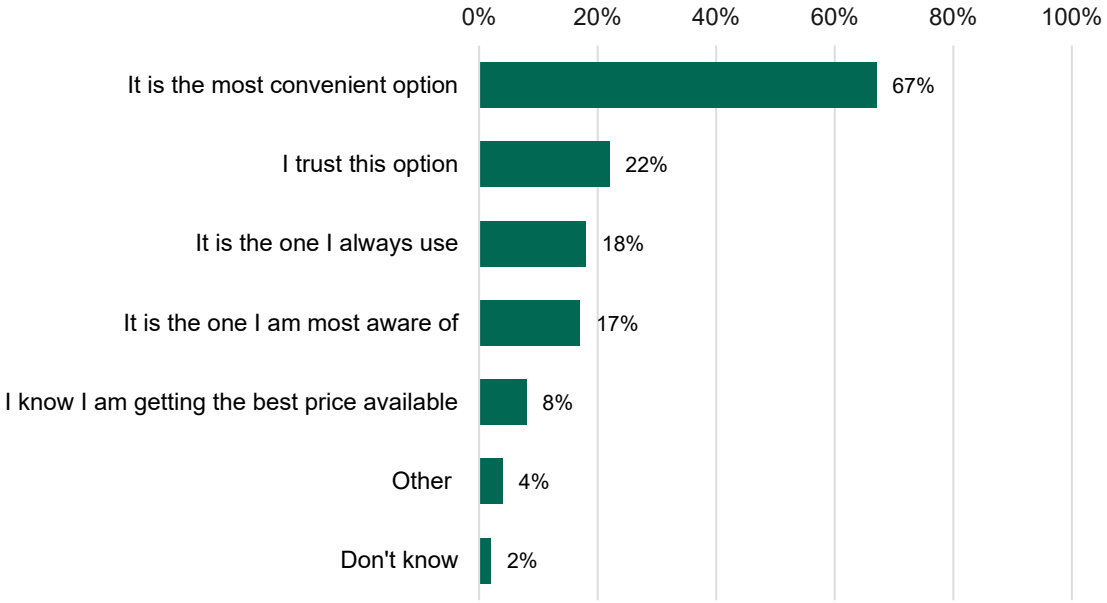


D11. Which one do you use most often? - Please only select one option. Base: All respondents, excl. no response (7,463) D12. Which one is your preferred option? - Please only select one option. Base: All respondents, excl. no response (7,467)

Why do rail passengers prefer certain ticket fulfilment options?

For two thirds of respondents (67%), convenience was the main reason they preferred a particular ticket fulfilment option over another. Trust is the next most popular reason, with 22% selecting 'I trust this option' as the reason for their preference.

Figure 12. Reasons for preferred ticket fulfilment option



D14. And why is your answer at D12 your preferred option? Please select all that apply. Base: All respondents, excl. no response (7,739)

As illustrated in Table 15, those who said they prefer orange cardboard tickets were more likely than others to cite familiarity and trust as reasons, while those who preferred digital and contactless options were more likely to cite convenience as the reason for this preference.

Table 15. Reason for preference, by preferred ticket fulfilment option

	Orange cardboard ticket	Printed barcode/QR code	Digital barcode/QR code	Smartcard	Contact-less bank card	Contact-less mobile payment	PAYG Smartcard
It is the most convenient option	42%	64%	86%	70%	80%	87%	61%
I trust this option	38%	22%	16%	14%	14%	13%	23%
It is the one I am most aware of	28%	19%	12%	8%	15%	9%	15%
It is the one I always use	21%	15%	19%	18%	14%	16%	21%
I know I am getting the best price available	7%	3%	10%	12%	5%	4%	21%
Other	7%	2%	2%	8%	1%	1%	5%
Don’t know	1%	2%	1%	1%	1%	1%	2%
Base	1,871	291	2,580	386	789	826	392

D14. And why is your answer at D12 your preferred option? Please select all that apply. Base: All respondents excl. no response (7,739)

In line with their stated preferences, convenience was more important to those aged 65 and under (73% of those aged under 26, 71% of 26-45s and 63% of 46-65s cited this as important, compared to 55% of those aged 66+). Conversely, those aged 66+ were more likely than those in other age groups to say trust was an important factor (34% vs. 20% for under 26s, 17% for 26-45s and 25% for 46-65s).

One quarter (25%) of those aged under 26 said their preferred option - which is most often digital - is the one they always use, compared to 16% for 26-45, 15% for 46-65 and 19% for 66+.

2. Current use and importance of station retailing facilities

Chapter overview

This chapter explores how respondents perceive the importance of ticket offices and Ticket Vending Machines (TVMs) and for what purpose they routinely use these options, if at all. Where relevant, significant differences by age, gender, region, frequency of rail travel and household income are included. Ticket office and TVM use among disabled, non-digital, unbanked and cash-reliant respondents is covered separately in Chapter 3.

Ticket offices and staff presence at stations

Why do rail passengers use ticket offices?

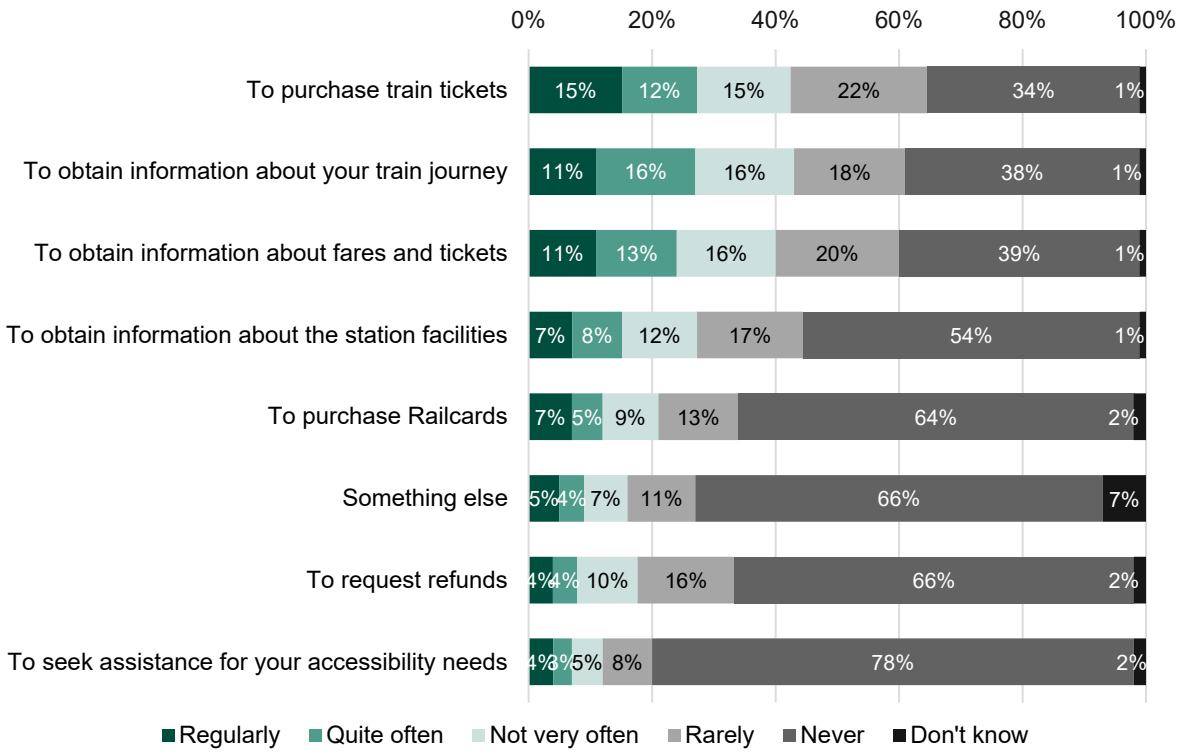
Respondents were asked how often in the last six months they had used a ticket office for a list of different purposes (shown in Figure 13).

Two fifths (42%) of respondents said they had quite often or regularly used a ticket office in the last six months for one or more of the purposes listed in Figure 13. This increases to 44% for weekly or monthly travellers and drops to 35% for those who travel less than monthly.

Around one fifth (21%) said they had not used a ticket office for any purpose in the past six months.

As illustrated in Figure 13, ticket offices were most frequently used to purchase tickets and obtain information about train journeys, with 27% of respondents saying that they used them quite often or regularly for each of these purposes.

Figure 13. Use of a station ticket office for the following purposes in last 6 months



E3. How frequently in the past 6 months have you used a station ticket office to do the following? Base: All respondents, excl. no response (6,778-7,829)

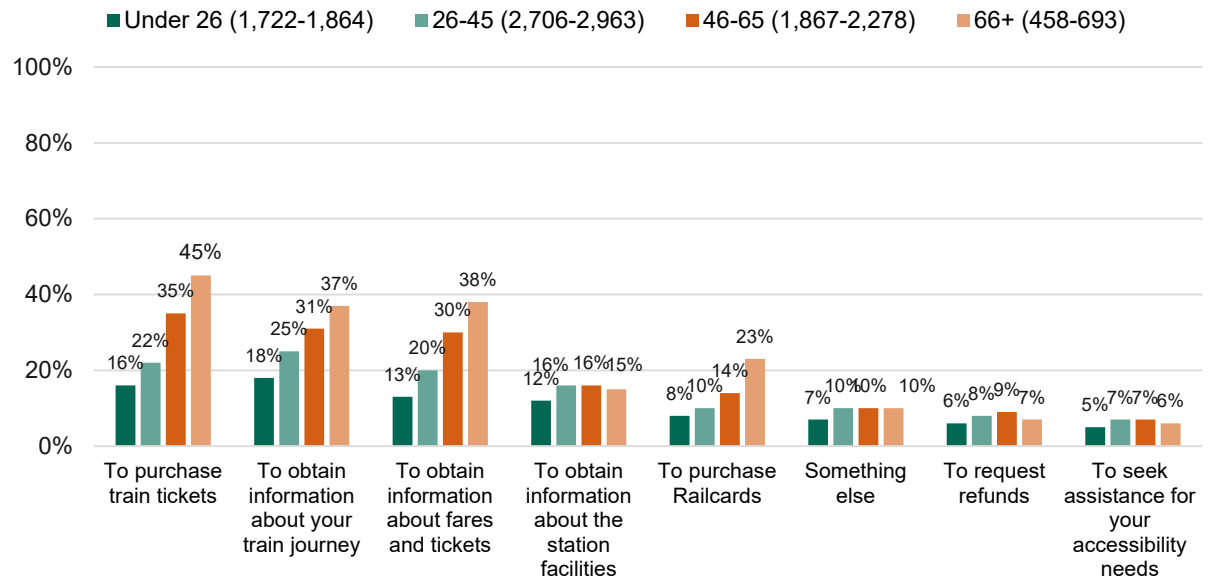
As shown in Figure 14, the proportion of respondents who had used a ticket office quite often or regularly to purchase train tickets, obtain information about train journeys, obtain information about fares and tickets, and to purchase railcards was higher among the older age groups. For example, just 16% of those aged under 26 said that, in the past 6 months,

they had quite often or regularly used a station ticket office to purchase train tickets. This figure rises to 35% among those aged 46-65 and to 45% among those aged 66+.

Conversely, the proportion saying that they had never used a ticket office to purchase tickets in the last six months is highest among those aged under 26 (at 46%, compared to 36% for 26-45, 29% for 46-65, and 22% for 66+).

Use of ticket offices to obtain information about station facilities, request refunds or seek assistance for accessibility needs sits on a similar level for all age groups. This may be because these activities are not required for every train journey and so it follows that, for these less frequent needs, respondents will use a ticket office regardless of their age.

Figure 14. Quite often/regularly use a station ticket office for the following purposes, by age



E3. How frequently in the past 6 months have you used a station ticket office to do the following? Base: All respondents, excl. no response (6,778-7,829)

Overall, just 7% percent of all respondents said that they had quite often or regularly used a ticket office to seek assistance for their accessibility needs in the last six months. However, this was higher among those with a disability (10% vs. 6% of those with no disability), particularly those with mobility issues (19%). Respondents who said they had used Passenger Assist in the past were also much more likely to say they had used ticket offices quite often or regularly to seek assistance for their accessibility needs (34% vs. 6% among those who do not use Passenger Assist). Use of ticket offices among those with a disability is covered in more detail in Chapter 4.

Table 16 shows that, in general, ticket office use tends to be highest in the North of England (including Yorkshire and Humberside), South East and East of England and lowest in London and the Midlands. Lower levels of use in London could potentially be due to the alternative payment options available in this area (e.g., PAYG, Oyster etc.).

Table 16. Percentage quite often or regularly using a station ticket office, by region where respondent lives

	South West	South East	London	East of England	East Mid-lands	West Mid-lands	North East	North West	York-shire & Humber-side
Total: One or more of the purposes listed	38%	47%	38%	49%	34%	36%	40%	43%	43%
To purchase train tickets	25%	35%	19%	36%	20%	22%	23%	27%	26%
To obtain information about your train journey	25%	28%	26%	31%	23%	24%	29%	27%	31%
To obtain information about fares and tickets	21%	26%	18%	31%	21%	17%	24%	25%	28%
To obtain information about the station facilities	15%	14%	16%	14%	15%	11%	17%	18%	20%
To purchase Railcards	11%	15%	9%	14%	9%	7%	15%	11%	11%
Something else	9%	9%	8%	8%	11%	6%	11%	11%	12%
To request refunds	7%	9%	7%	6%	9%	4%	10%	8%	8%
To seek assistance for your accessibility needs	6%	6%	6%	6%	8%	4%	15%	9%	8%
Base	730-867	1,556-1,791	1,286-1,525	495-567	455-495	480-556	139-162	410-465	441-486

E3. How frequently in the past 6 months have you used a station ticket office to do the following? Base: All respondents, excl. no response (6,778-7,829)

How important are ticket offices to rail passengers?

Respondents were asked to rate how important it was to them personally that the station they travelled from had a ticket office.

Just over half of respondents (56%) said that having a ticket office at the station they travel from is fairly or very important to them personally. Around one quarter (26%) said that the presence of a ticket office is fairly unimportant or not at all important.

Among those who said that having a ticket office is important, 60% had used one for any purpose quite often or regularly in the last six months. Just over two fifths (43%) of this group had used a ticket office quite often or regularly to purchase train tickets.

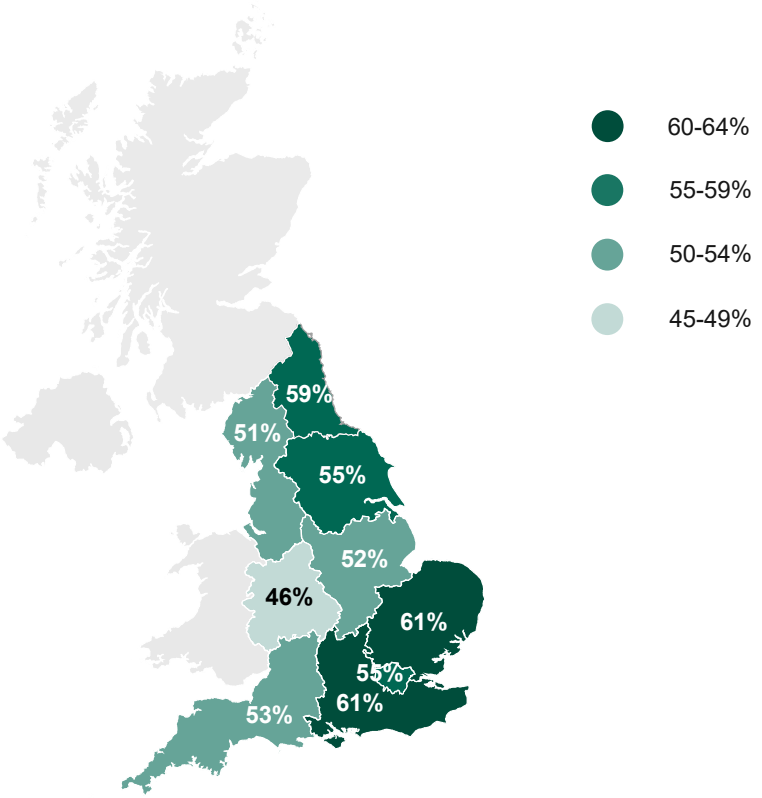
There is a correlation between age and the perceived importance of having a ticket office at the station. Seven in ten (71%) respondents aged 66+ said that having a ticket office at the station they are travelling from is important to them personally, compared to just 43% of those aged under 26, 53% of those aged 26-45, and 63% of those aged 46-65.

Infrequent travellers (those who have used the train less often than once a month over the past six months) are more likely than those who travel at least once a month to rate ticket offices as fairly or very important (59% vs 55% respectively).

At a regional level, respondents in the East of England and the South East of England were most likely to say it is important that there is a ticket office at the station they travel from (both at 61%). Stated importance is also relatively high in the North East, where website/app use is more prevalent and preference for purchasing train tickets at a station

ticket office is lower. This suggests that respondents value ticket offices for reasons that go beyond ticket purchasing behaviour and preferences.

Figure 15. Percentage rating the presence of station ticket offices as fairly/very important, by region where respondent lives



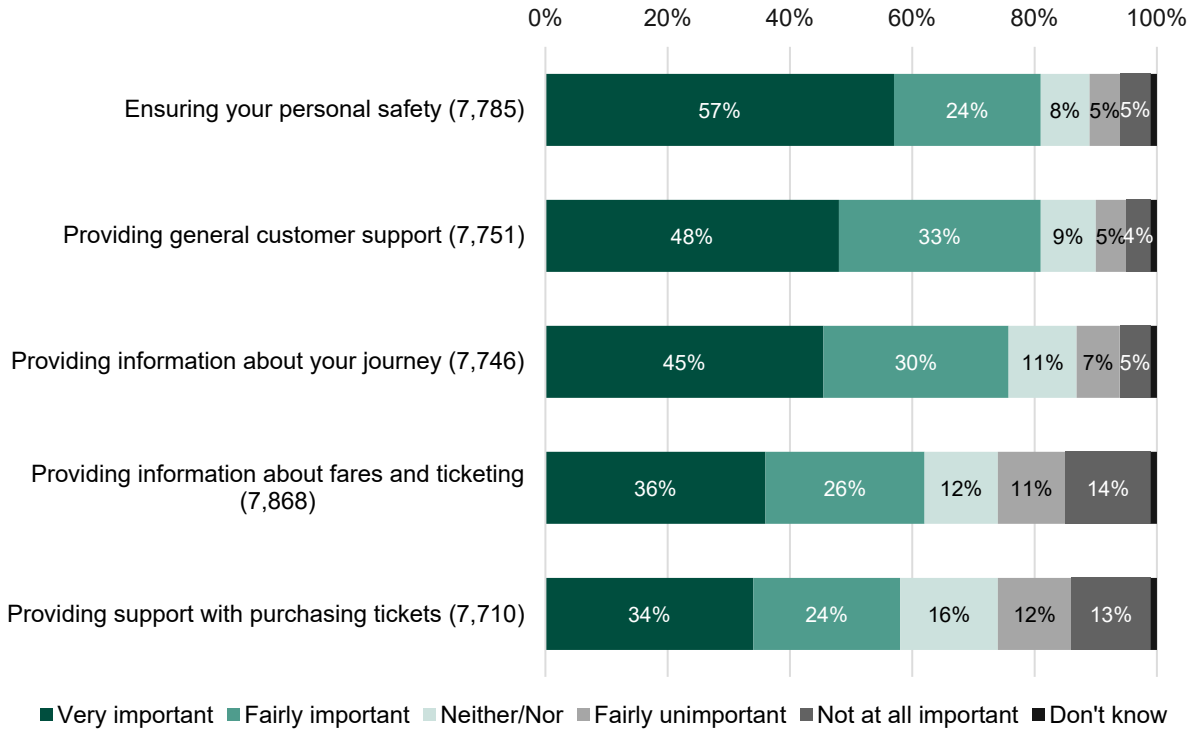
E4. For you personally, how important/unimportant is it that the station you travel from has a ticket office? Base: All respondents, excl. no response (8,077)

How important is staff presence at stations?

Respondents were also asked to rate the importance of staff presence for different purposes.

The majority of respondents (81%) rated staff presence fairly or very important for ensuring personal safety. Of similar importance is the presence of staff to provide general customer support, with an overall importance of 80% but with a smaller proportion of respondents rating this as “very important”.

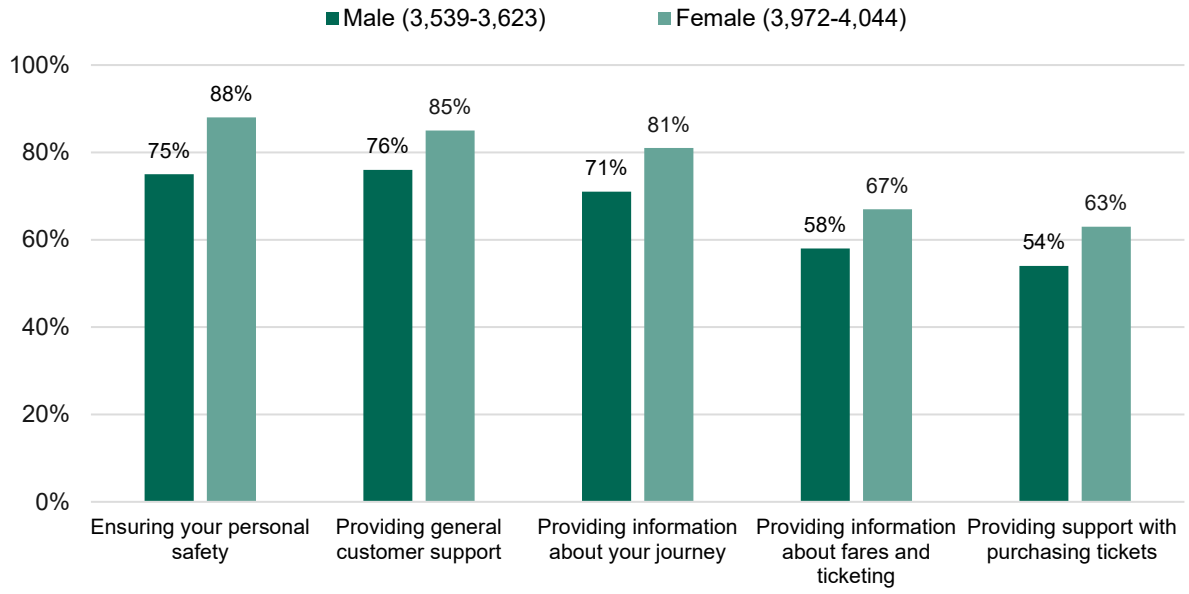
Figure 16. Importance of staff presence for the following purposes



E1. For you personally, how important or unimportant is the presence of staff for each of the following purposes? Base: All respondents, excl. no response (8,132)

As shown in Figure 17, for all the purposes listed, women were more likely than men to rate staff presence as fairly or very important.

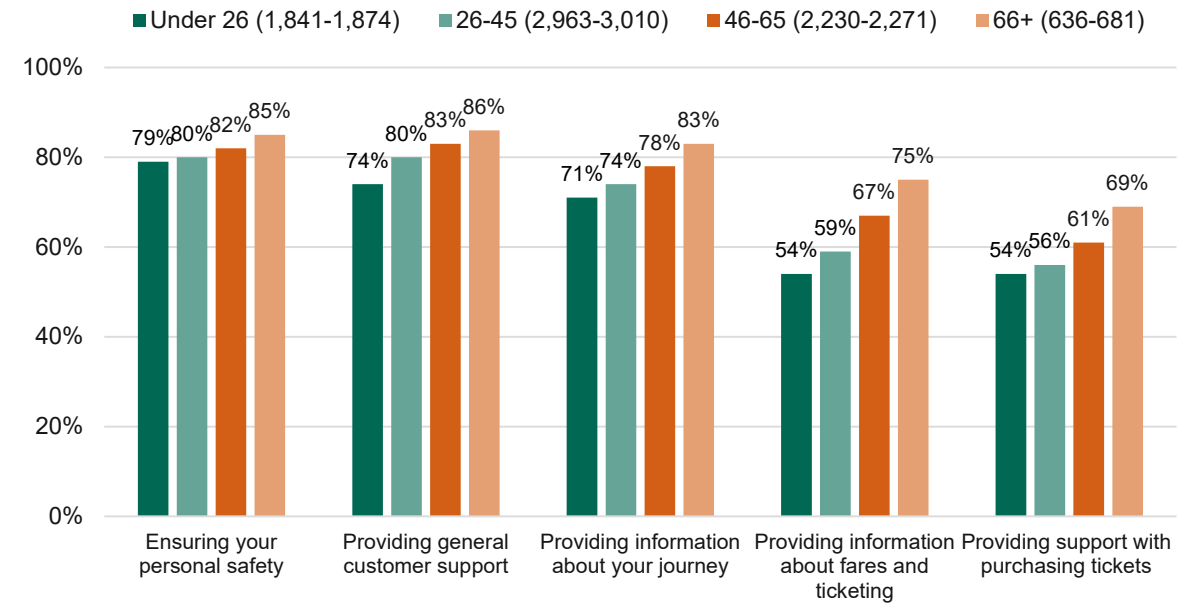
Figure 17. Percentage rating staff presence as fairly/very important for the following purposes, by gender



E1. For you personally, how important or unimportant is the presence of staff for each of the following purposes? Base: All respondents, excl. no response (8,132)

There is a correlation between age and the perceived importance of staff presence: the older the rail passenger, the more likely they are to place importance on having staff presence at stations. However, while the importance of staff presence for ensuring personal safety is on a high level across all age groups, the difference between the youngest (under 26) and oldest (66+) groups is greater for other purposes. This is particularly true in relation to the perceived importance of staff presence to provide information about fares and ticketing. Those aged under 26 were much less likely than those aged 66+ to consider this important (54% vs. 75% respectively).

Figure 18. Percentage rating staff presence as important for the following purposes, by age



E1. For you personally, how important or unimportant is the presence of staff for each of the following purposes? Base: All respondents, excl. no response (7,710-7,868)

Respondents who reported that they have travelled by rail less than once a month over the last six months were more likely than those travelling more often to rate the presence of staff as important for providing information about fares and ticketing (69% vs. 63% of monthly and 59% of weekly travellers), providing general customer support (85% vs. 81% of monthly and 78% of weekly travellers), providing information about their journey (81% vs. 77% of monthly and 73% of weekly travellers), and for support with purchasing tickets (64% vs. 58% of monthly and 56% of weekly travellers).

Likely use of staff support on the concourse

Respondents were asked - 'if staff were available to provide support on the concourse, rather than at the ticket office, how likely or unlikely is it that you will use this option?' The type of 'support' was not defined in this question, allowing the respondent to interpret it according to their own needs.

Nearly half of all respondents (46%) said they would be fairly or very likely to seek staff support on the concourse, rather than at the ticket office, while 23% said this was fairly or very unlikely. Just 2% of respondents said that they would not be able to use this option.

Those with a condition affecting their vision were more likely than those with no disability to state that they would not be able to use this option (5% vs. 2% respectively), which may be related to concerns about finding staff on the concourse, if they are not well sign posted.

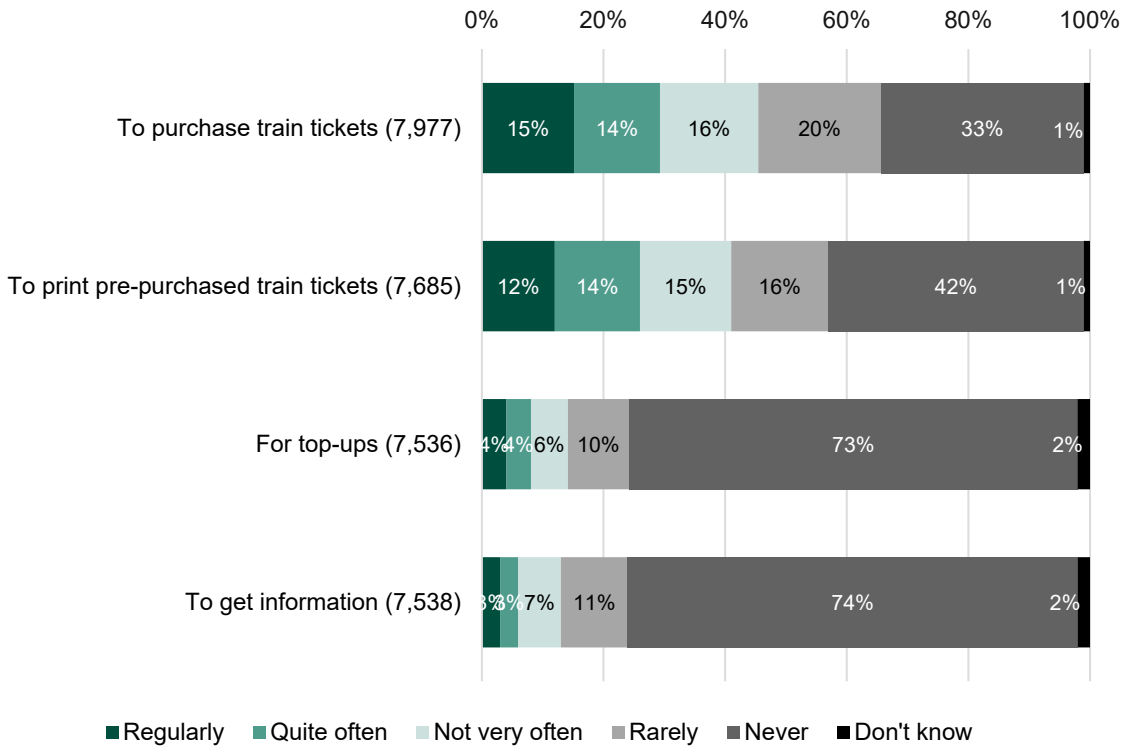
Ticket Vending Machines (TVMs)

Why do rail passengers use Ticket Vending Machines (TVMs)?

Overall, two fifths of respondents (42%) reported that they have used a Ticket Vending Machine (TVM) quite often or regularly for any of the purposes listed below in the past six months. Nearly one fifth (18%) said that they have used a TVM quite often or regularly for multiple purposes.

Three in ten respondents (29%) said they had quite often or regularly used a TVM to purchase tickets, and one quarter (26%) had used a TVM to print pre-purchased tickets in the last six months. Less than one in ten respondents had used a TVM for getting information (6%) or for top ups (9%).

Figure 19. Use of a TVM for the following purposes in past 6 months



F1. How frequently in the past 6 months have you used a Ticket Vending Machine to do the following? Base: All respondents, excl. no response (8,132)

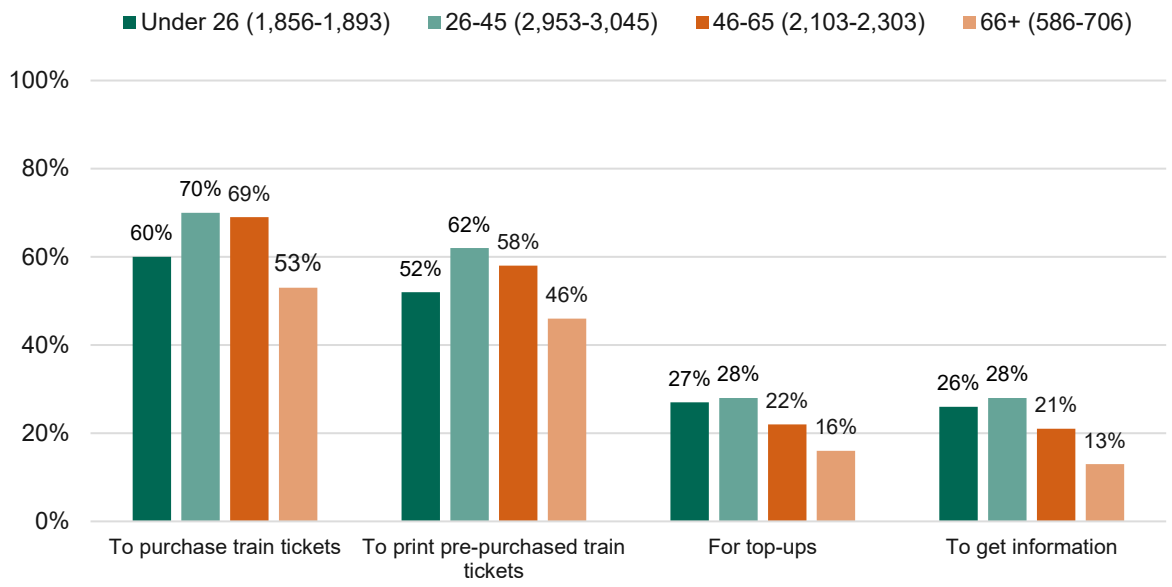
A higher proportion of male than female respondents reported that they had quite often or regularly used a TVM for any purpose in the last six months (43% vs. 41% respectively). Similarly, those with an income of over £30,000 were more likely than those with an income of £30,000 or less to have used a TVM in the last six months (46% vs. 40% respectively). This is in contrast to ticket office use, where those with an income of £30,000 and under were more likely than those with an income of over £30,000 to have used a Ticket Office quite often or regularly for any purpose in the last six months (49% vs. 39% respectively).

Linked to income, regular use of TVMs was also highest among those aged 26-65 years old (45% of this group said they had used a TVM quite often or regularly for at least one

purpose in the last six months, compared to 38% for under 26 and 32% for 66+). It is worth remembering that the 26-65 age group were also most likely to be commuting regularly.

Figure 20 shows the percentage of respondents in each age group who have used a TVM at least once in the last six months. In line with the pattern seen for regular use (used quite often or regularly), those aged 26-65 years old were more likely than others to have used a TVM to purchase or print tickets in the last six months. In contrast, the use of TVMs for top-ups, and to get information is higher among younger respondents (aged 45 and under).

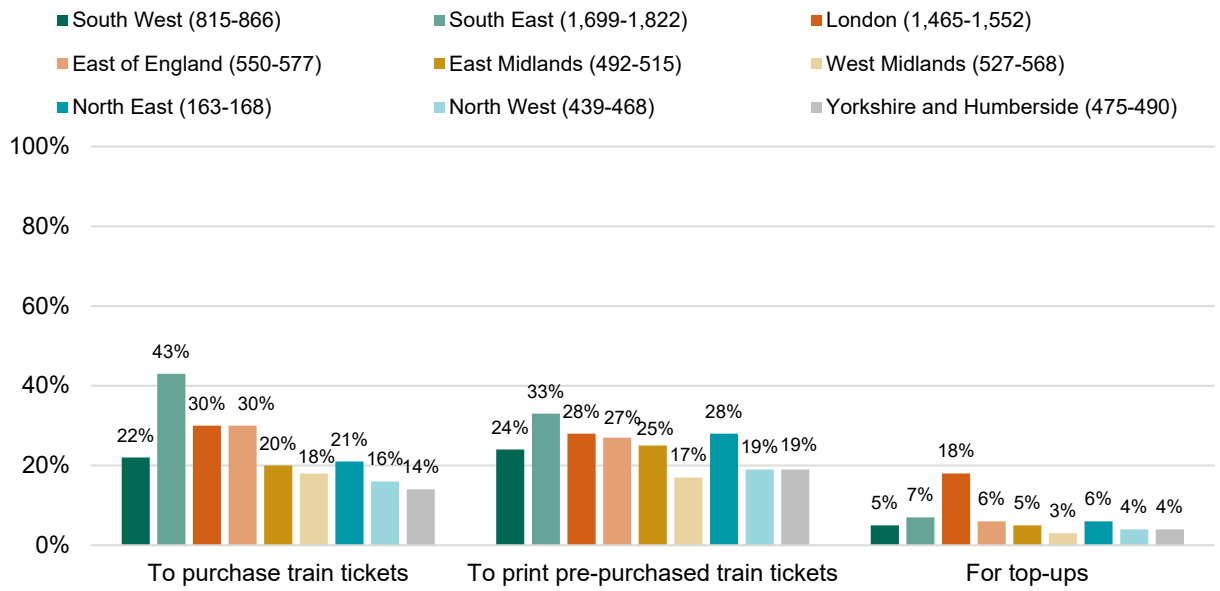
Figure 20. Use of a TVM for the following purposes at least once in past 6 months, by age



F1. How frequently in the past 6 months have you used a Ticket Vending Machine to do the following? Base: All respondents, excl. no response (8,132)

There were also some clear regional differences in relation to TVM use, as illustrated for the top three TVM uses in Figure 21 below. For instance, respondents in the South East, East of England and London were more likely than those in other regions to say they had used a TVM to purchase train tickets (43%, 30% and 30% respectively), while the use of TVMs for top-ups was much more common in London (18%).

Figure 21. Percentage who quite often/regularly use a TVM for the following purposes, by region*

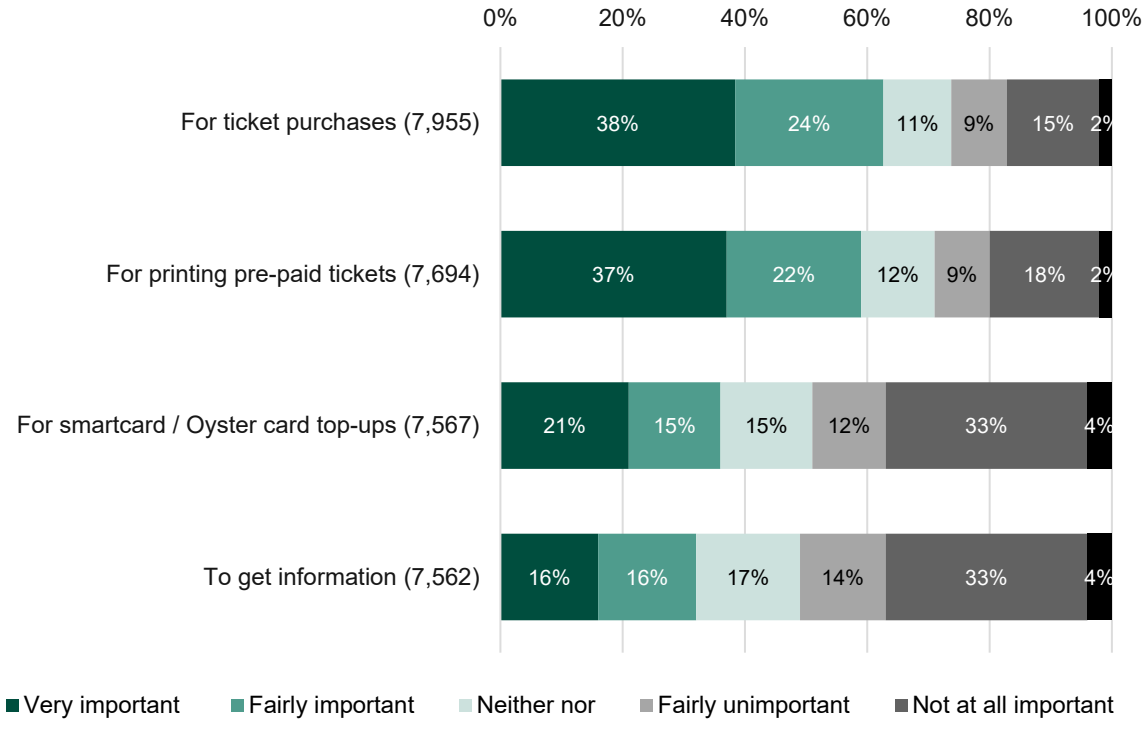


F1. How frequently in the past 6 months have you used a Ticket Vending Machine to do the following? Base: All respondents, excl. no response (8,132) * For readability, the chart shows top three uses, and excluded the purpose of 'to get information'.

How important are TVMs to rail passengers?

In line with stated use, TVMs were perceived to be most important for the purpose of purchasing tickets. Around six in ten respondents (62%) felt that the presence of TVMs is fairly/very important for this purpose. A similar proportion (59%) said that TVMs are important for printing pre-paid tickets. Only one third (32%) believed TVMs are important for getting information.

Figure 22: Perceived importance of having a TVM at the station for the following purposes



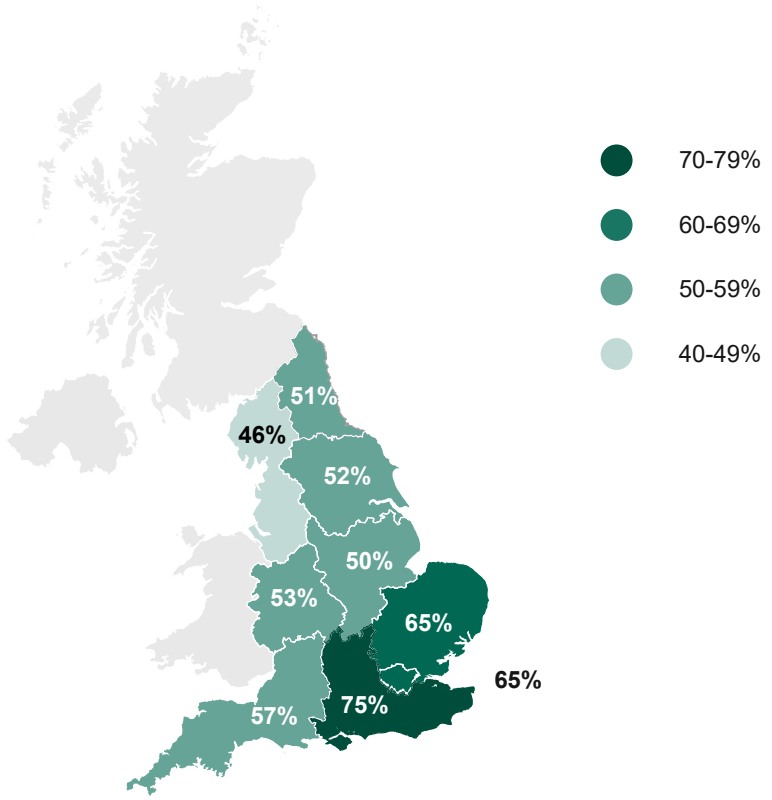
F2. For you personally, how important/unimportant is it that the station you travel from has a Ticket Vending Machine for the following purposes? Base: All respondents, excl. no response (8,132)

Frequency of use correlates with the perceived importance of TVMs; those who reported using TVMs quite often or regularly were also more likely to see their presence as fairly or very important.

Female respondents were more likely than male respondents to say that TVMs were important for printing pre-paid tickets, for smartcard/oyster card top-ups and for getting information (rated fairly or very important by 60%, 38% and 34% of females, vs. 57%, 34% and 30% of males, respectively).

As shown in Figure 23, the perceived importance of TVMs for ticket purchase was highest in the South East (75%), East (65%) and London (65%).

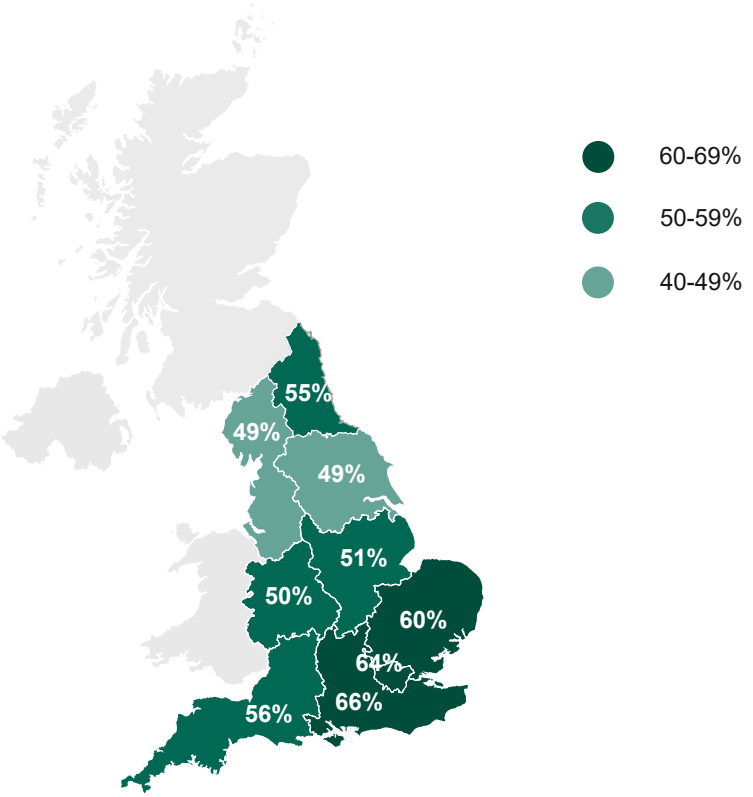
Figure 23: Percentage rating having a TVM at the station for ticket purchases as fairly/very important, by region where respondent lives



F2. For you personally, how important/unimportant is it that the station you travel from has a Ticket Vending Machine for the following purposes? Base: All respondents, excl. no response (7,955)

A similar pattern can be seen in relation to printing pre-paid tickets. Two thirds of respondents in the South East (66%), 64% in London, and 60% in the East of England rated TVMs important for this purpose. This tends to reflect the higher levels of use in these regions, as seen earlier in this chapter.

Figure 24: Percentage rating having a TVM at the station for printing pre-paid tickets as fairly/very important, by region where respondent lives



F2. For you personally, how important/unimportant is it that the station you travel from has a Ticket Vending Machine for the following purposes? Base: All respondents, excl. no response (7,694)

As might be expected, given that Oyster cards are particular to London, the ability to top up Smartcards/Oyster cards at a TVM was most important to Londoners (55% versus 24-35% in other regions). Likewise, the importance of TVMs as a source of information was also rated more highly compared to most other regions (38% vs. 26-34% in other regions).

Those who were travelling on company business (69%) and those commuting for work (65%) when approached to take part in the survey were more likely than those commuting for education (58%) to rate TVMs as important for the purpose of purchasing train tickets. This mirrors the higher reported use for these passenger groups outlined earlier in the chapter.

Likely use of cashless TVMs

Respondents were asked to consider the likelihood that they would use a Ticket Vending Machine (TVM) to purchase their ticket if it was cashless (i.e., it was not possible to pay using cash).

Over one third of respondents (35%) said they were fairly or very likely to use a cashless TVM. A similar proportion (32%) said they were fairly or very unlikely to use a cashless TVM. Six percent (6%) said they would not be able to use this option.

Likely use of cashless TVMs was significantly higher among the 11% of respondents who cited a preference for this ticket purchase method (62%, compared with 37% among those

who prefer Ticket Offices, 30% among those who prefer digital and 36% among those who prefer tap in/tap out).

Those residing in the South East and East of England were most likely to use a cashless TVM (43% and 38% respectively), while those in Yorkshire and Humberside were least likely to do so (24%). This is mostly in line with reported use of TVMs for ticket purchase, which is highest in the South East.

As might be expected, cash only respondents were significantly more likely than others to say they would not be able to use a cashless TVM (22% vs. 6% for card users).

Unbanked respondents were also more likely than those with access to a bank account to say that they would not be able to use a cashless TVM (10% vs. 6% respectively).

A small proportion (4%) of those who said they had used a TVM in the last six months reported that they would not be able to use a cashless TVM. Among those who report that TVM is their preferred ticket purchase method, 2% said they would not be able to use a Cashless TVM. This highlights that a small number of current TVM users would be impacted should their TVM become cashless.

3. Groups that may face barriers to digital ticketing

Chapter overview

This section introduces and defines vulnerable groups that may find it difficult or impossible to purchase tickets digitally and explores their current ticket purchasing behaviour and preferences. These groups include:

- Disabled rail passengers
- Rail passengers with no internet access on a smartphone
- Rail passengers with internet access but low digital confidence
- Unbanked rail passengers
- Cash reliant rail passengers

These groups will be considered in Chapter 4, when reviewing responses and likely uptake of possible ticket retailing initiatives.

Disabled rail passengers

Disabled rail passengers

As shown in the Background, objectives and methodology chapter (page 21 onwards), 16% of respondents reported having some form of health condition or illness. Prevalence of reported disability was higher in the under 26 and 66+ age groups, with 24% of respondents in each group saying they had a health condition or illness. In line with this age profile, those with any type of health condition or illness were significantly more likely to be unemployed/not working (11% vs. 3% with no disability), retired (13% vs. 10% with no disability) or studying (16% vs. 10% with no disability).

As shown in Table 3, those aged under 26 were more likely than other age groups to report having a condition affecting their mental health, social/behavioural, or learning/understanding/concentration, while those aged 66+ more often reported a condition affecting their mobility, hearing, or dexterity. These links between age and type of disability had an impact on reported ticket purchasing preferences and behaviour.

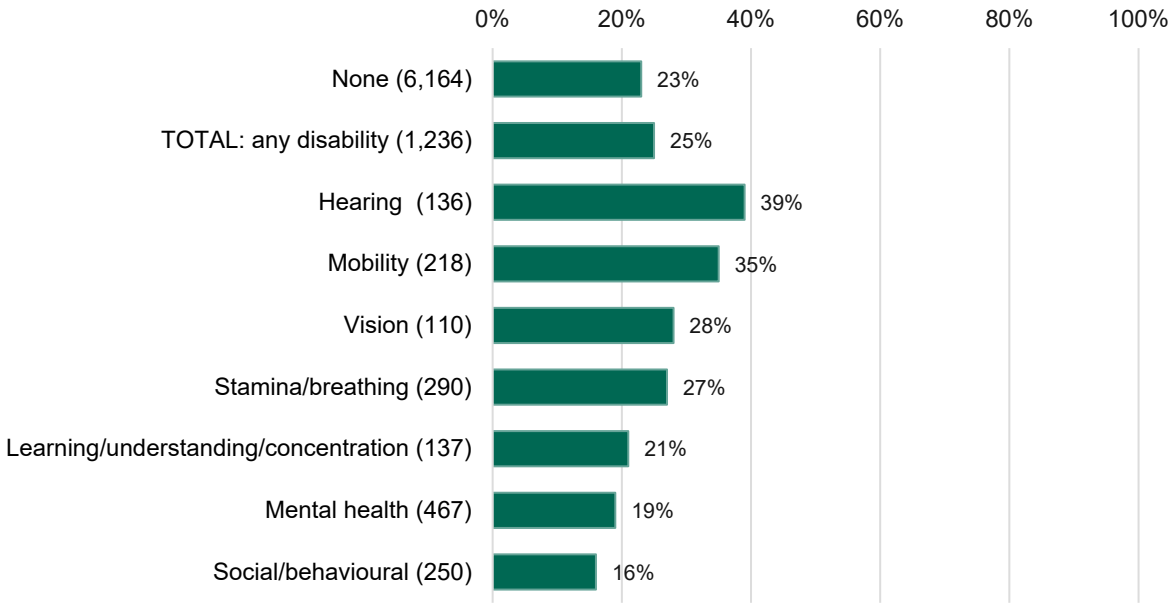
There are few regional differences in relation to disability, however those based in London were significantly less likely than those in most other regions (except East Midlands and North West) to have any health condition/illness (13%, compared to 16-24% in other regions).

Ticket purchasing behaviour and preferences among disabled rail passengers

Preferred ticket purchase method

At an overall level, preference for purchasing tickets from a station ticket office was not affected by disability (25% preference among disabled respondents vs. 23% among those with no disability). However, as shown in Figure 25, respondents with certain types of disability, particularly hearing and mobility were more likely than others to express a preference for ticket office purchase (39% and 35% respectively).

Figure 25. Preference for purchasing tickets at a station ticket office, by disability*



D2. Which is your preferred ticket purchase method? Base: All respondents, excl. no response (8,001) * Conditions with a base size of <100 not shown separately

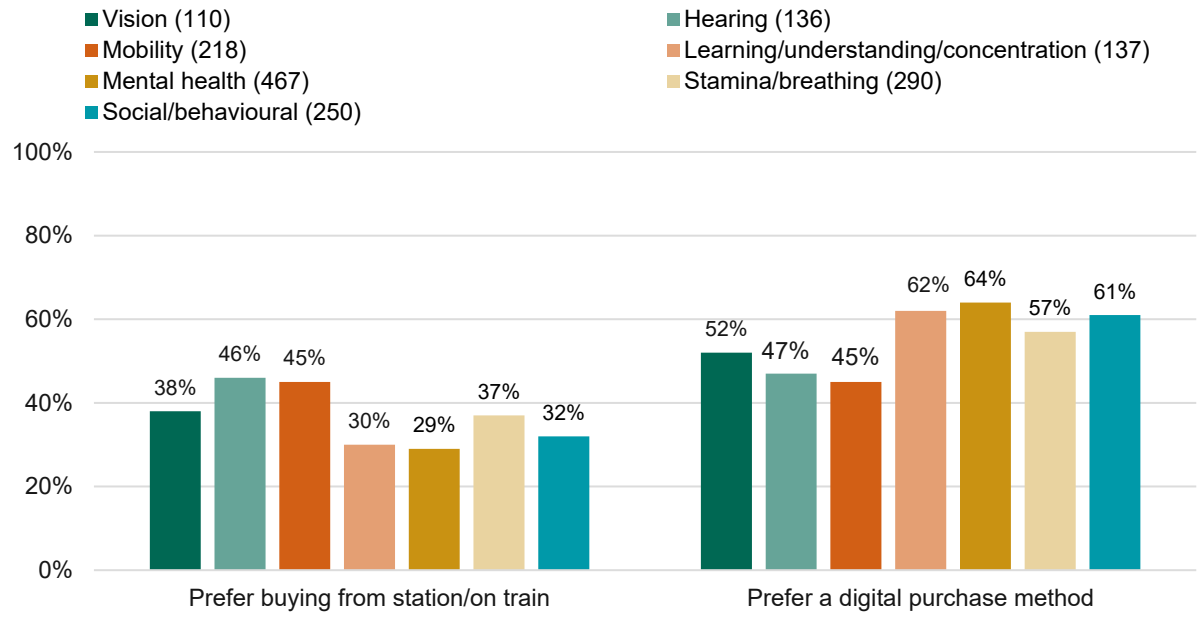
These differences in ticket office preference may be related to certain health conditions creating a greater need for staff support but are also likely to be affected by age. Mobility and hearing were the most reported health conditions among those aged 66+ (experienced by 10% and 9% respectively), suggesting that health conditions are more likely to influence the purchasing behaviour and preferences of older respondents.

Preference for ticket office purchase was lowest among those reporting a mental health (19%) or social/behavioural condition (16%), conditions which are more often reported by those aged under 26.

Preference for purchasing tickets from a TVM was also influenced by type of health condition. Those with a social/behavioural condition were more likely than those with no disability to prefer TVMs (17% vs. 11% respectively). This may be due to a preference for less interaction with staff among those with a social/behavioural condition but is also likely to be influenced by age. A social/behavioural condition was most often reported by those aged under 26.

As shown in Figure 26, respondents with a disability affecting their mental health were more likely than others to express a preference for digital methods (64% vs. 55% with no disability and 56% with any disability). Conversely, those with a condition affecting their hearing or mobility were more likely than others to state a preference for at station/on train purchase methods (46% and 45% respectively vs. 34% with no disability and 36% with any disability).

Figure 26. Preferred ticket purchase method, by disability



D2. Which is your preferred purchase method, excl. no response (8,001). 'From station/on train' includes 'At a station ticket office', 'At a TVM', 'At a TVM (with assistance), 'From a conductor/on the train' and 'From mobile staff at the station'. 'Digital purchase' includes 'Online (from the train company's website', 'Online (from another website', 'Mobile app from the train company' and 'Another mobile app'.

The most important factors influencing ticket purchasing preferences are the same regardless of whether a respondent has a disability and regardless of the type of health condition or illness reported. Getting the best priced ticket, using the quickest option and using the easiest option were ranked most important by all. However, those with a condition affecting their mental health or vision more often cited trust as important (8% and 11% vs. 6% with no disability). Similarly, the preference for purchasing tickets in-person was also more often cited by respondents with a condition affecting their hearing (9%), vision (8%) or mobility (7%), compared with 3% among those with no disability.

Use of websites/apps to purchase train tickets

The use of websites and apps to purchase tickets was highest among those with mental health (84%) or social/behavioural conditions (83%), compared to 77% among those with no disability. Notably, these health conditions were more often reported by younger respondents.

Reported use of websites and apps among respondents with other conditions was in line with the those with no disability (82% for learning/understanding/concentration, 79% for stamina/breathing, 73% for mobility, 72% for vision, and 70% for hearing, compared with 77% with no disability).

Regardless of disability, the top reasons for using websites and apps are the same - being quick to use (60% of disabled respondents selected this, vs. 61% with no disability), easy to use (61% vs. 58% respectively) and getting cheap train tickets (52% vs. 47% respectively). However, it is interesting to note that the above-mentioned groups (i.e., those with mental health or social/behavioural conditions) were more likely than others to select 'I trust this website/app' as a reason for use (37% and 36% vs. 27% with no disability).

Ticket payment methods

Disabled respondents were more likely than others to have used cash to pay for their train tickets in the last six months (21%, compared to 14% with no disability). Use of a bank card on a mobile phone was higher among those with a condition affecting their learning/understanding/concentration (47%), mental health (47%), or social/behavioural (49%) were more likely than others to have used a bank card on a mobile phone (36% among those with no disability). Again, age is likely to play a role here.

Ticket fulfilment options

In line with all respondents, the orange cardboard ticket was the most used ticket format among those with any disability (35% said this is the option they use most often). However, as discussed throughout this section, there are key differences by disability type. Those with a condition affecting their mental health were significantly more likely than others to use a digital barcode/QR code most often (44% vs. 31% with no disability). Again, it is likely that age is influencing the results.

Seven in ten respondents (69%) with any disability stated that they do not currently use a digital or contactless product but would be able to if necessary. This is on a similar level to those with no reported disability (65%). Here, there are no significant differences by type of disability.

Use and perceived importance of station ticket offices

Disabled respondents were more likely than non-disabled respondents to have quite often or regularly used a ticket office to purchase train tickets (30% vs. 27%), obtain information about station facilities (19% vs. 14%), obtain information about their journey (30% vs. 26%), and to seek assistance for accessibility needs (10% vs. 6%). It is interesting to note that reported use of ticket offices for ticket purchase is higher than stated preference (25% of disabled respondents said they prefer to purchase tickets at a station ticket office). This suggests that some respondents may use a ticket office through necessity, rather than preference.

Those with a condition affecting their mobility were much more likely to have sought assistance for their accessibility needs (19% vs. 6% with no disability). As might be expected, respondents who said they use Passenger Assist were also much more likely to say they had used ticket offices quite often or regularly to seek assistance for their accessibility needs (35% vs. 6% who do not use Passenger Assist).

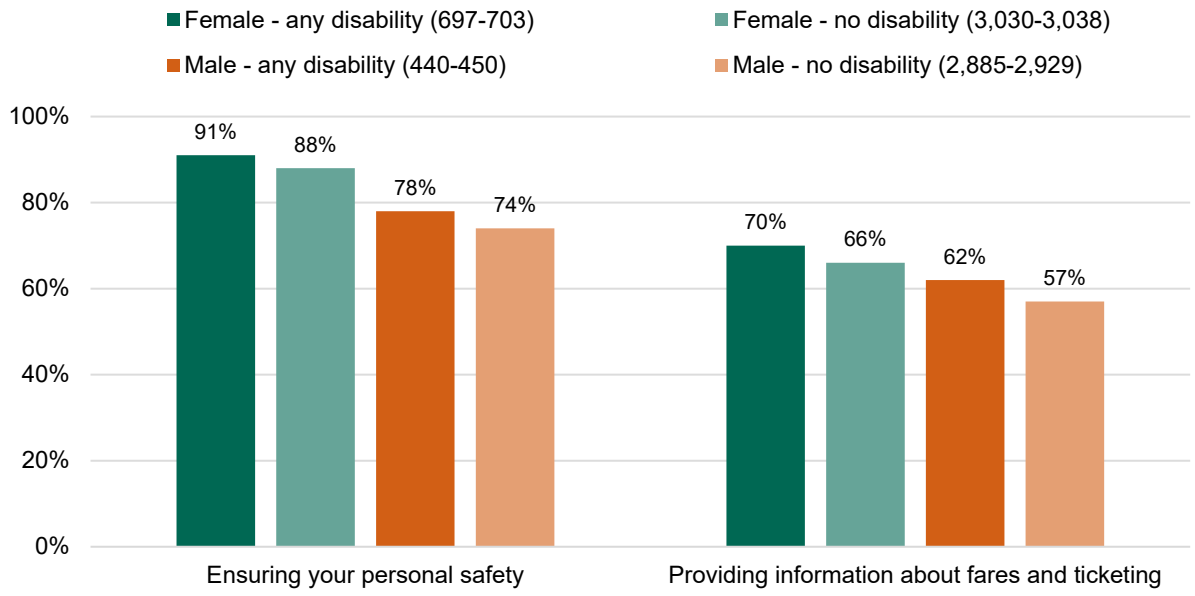
Staff presence generally was more often considered to be important among disabled respondents than non-disabled respondents. Nearly two thirds (63%) of those with any disability said staff presence was fairly or very important for providing support with purchasing tickets, compared to 57% of those with no disability.

Notably, when asked how likely they were to seek staff support on their concourse, rather than at a ticket office, those with a condition affecting their vision were more likely than

those with no disability to state that they would not be able to use this option (5% vs. 2% respectively). This may be related to concerns about finding staff on the concourse, if they are not well sign posted.

As seen earlier in the report, females were more likely than males to consider staff presence as important for all of the purposes listed. For disabled females, staff presence is even more important. Disabled females are significantly more likely than disabled and non-disabled males and non-disabled females to perceive staff presence as important. As shown in Figure 27, this is especially true for ensuring personal safety and in providing information about fares and ticketing.

Figure 27. Importance of staff presence for the following purposes, by gender and disability



E1. For you personally, how important or unimportant is the presence of staff for each of the following purposes? Base: All respondents, excl. no response (7,785-7,868)

Use and perceived importance of TVMs

At an overall level, reported use of TVMs for any purpose did not differ between those with any disability and those with no disability (42% of each group had used a TVM quite often/regularly for any purpose in the last 6 months). However, looking specifically at the use of TVMs to purchase train tickets, those with a social/behavioural condition were more likely than others to say they had used a TVM for this purpose (37% vs. 29% with no disability, 25% with a vision impairment, and 28% with a mental health condition).

Overall, disabled respondents placed lower importance on TVMs for ticket purchases (60% vs. 63% respectively) and for printing pre-paid tickets (56% vs. 59%). However, in line with their stated use, those with a social/behavioural condition were more likely than some others to state that the presence of TVMs for ticket purchase was fairly or very important to them personally (66%, compared with 55% among those with a condition affecting their mobility and 56% among those with a stamina/breathing condition). This group also placed higher importance on TVM presence for smartcard/Oyster card top-ups (42% vs. 30% for those with a vision impairment, 29% for those with a hearing impairment,

27% for those with a condition affecting their mobility and 28% for those with a condition affecting their stamina or breathing).

Internet access and digital confidence

Internet access and digital confidence among rail passengers

Internet access

Most respondents (96%) reported that they have internet access both at home and on a smartphone. Two percent (2%) said they only have internet access at home, and the same proportion (2%) said they have internet access on a smartphone only. One per cent reported that they do not have internet access on a smartphone or at home, equating to 92 respondents out of the 8,079 who answered this question.

As the group with no internet access is too small for robust statistical analysis, analysis in this section focuses on the three percent of respondents who reported they either have no access to the internet at all or have no access to the internet on a smartphone (3% of respondents).

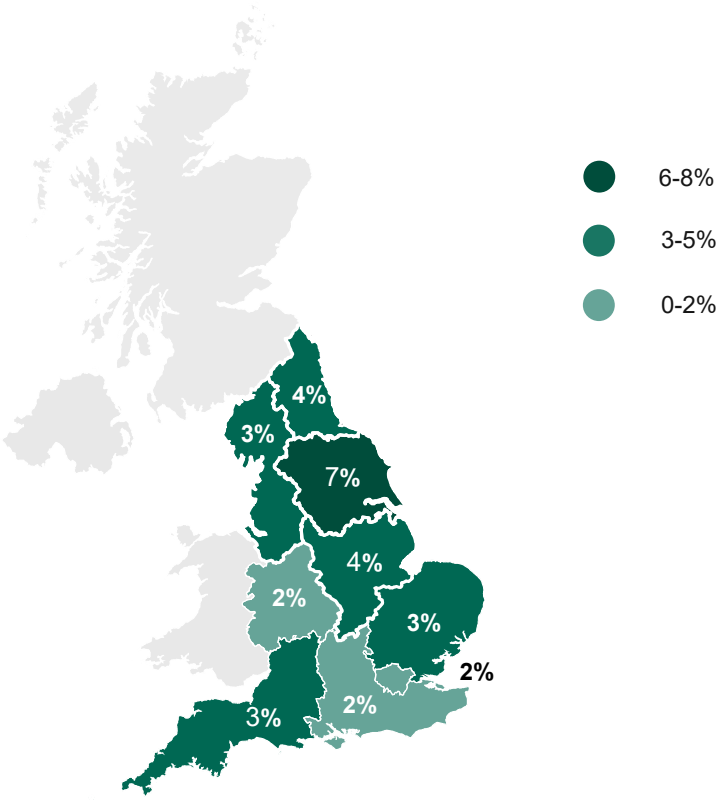
There is a clear correlation between age and internet access. Those aged 66+ were significantly more likely than other age groups to report having no internet access on a smartphone (13% vs. 0% of under 26s, 1% of 26-45s and 3% of 46-65s).

In line with the age profile, lack of internet access on a smartphone was higher among retired respondents and those who are unemployed/not working (12% and 7% respectively, compared to 1% among employed respondents).

Similarly, the proportion with no internet access on a smartphone was higher among those with a gross annual household income of £30,000 and under (5% vs. 1% among those with an income of over £30,000).

As shown in the map below, the proportion of respondents with no smartphone internet access was highest in Yorkshire and Humberside (at 7%), compared to 2-4% in other regions. Notably, the age profile and work status of respondents in Yorkshire and Humberside is not significantly different from other regions, suggesting that other factors are playing a role here. For example, mobile network coverage may play a role in more rural areas.

Figure 28. Percentage without internet access on a smartphone, by region



J6. Do you have access to the internet at home or on a smartphone? Base: All respondents, excl. no response (8,079)

Disabled passengers were more likely than non-disabled passengers to say they had no smartphone internet access (5% vs. 2% respectively). Linked to the age profile of this group (which tends to be 66+), those with a condition affecting their mobility were most likely to be affected (10% said they do not have smartphone internet access).

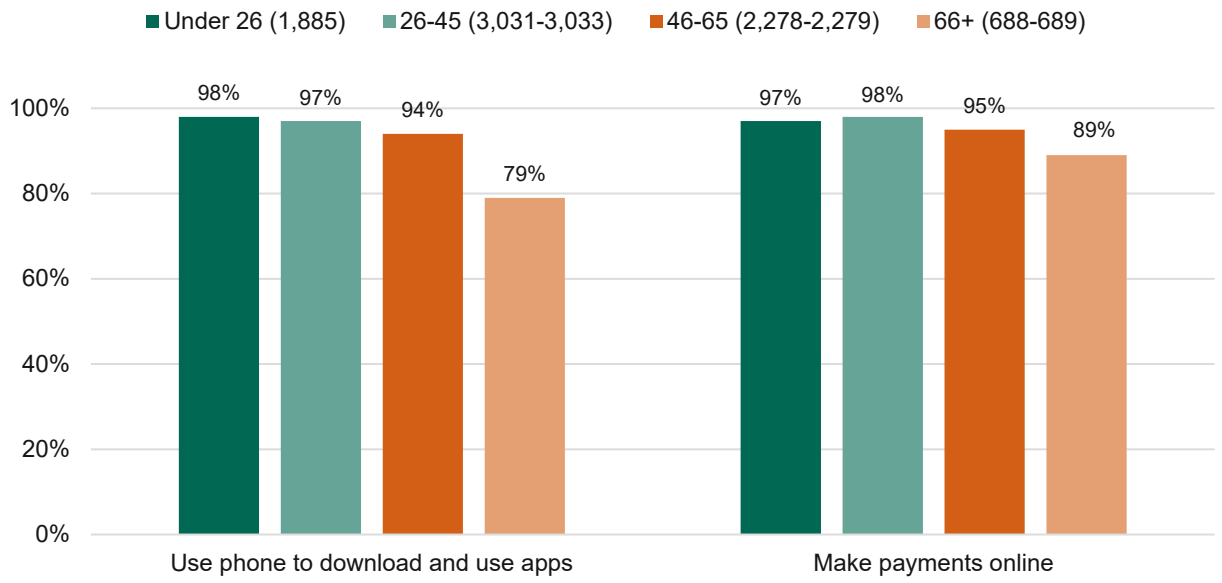
Digital confidence

To better understand the level of digital confidence among those with internet access, survey respondents were asked about their online activity. Namely, whether they search for information using websites, whether they make payments online and whether they download and use apps.

Almost all (99%) of those who said they have access to the internet, either at home or on a smartphone, said that they search for information online. Just 1% said that they do not. The proportion of those with internet access who said they do not make payments online is slightly higher - at 4%. Similarly, 5% of those with access to the internet said they do not download and use apps. For the purposes of this report, those who do not make payments online and those who do not download/use apps are considered to have lower digital confidence. The group of respondents who said they do not search for information online was too small to allow for further analysis and are therefore not included in this definition.

Use of the internet to search for information on websites was high across all subgroups but as shown in Figure 29, age was a key factor in whether respondents downloaded and used apps and whether they made payments online.

Figure 29. Percentage downloading/using apps and making online payments, by age



J8. Do you use your phone to download and use apps? Base: All respondents with internet access at home and/or on a smartphone, excl. no response (7,913) J9. Do you make payments online? Base: All respondents with internet access at home and/or on a smartphone, excl. no response (7,913)

At a more granular level, those aged 16-17 were more likely than those aged 18-25 years old to say they do not make payments online (8% vs. 2% respectively). However, it should also be noted that one in five 16-17 year olds (20%) reported they do not have a bank account, compared to just 6% of 18-25 year olds. (See following section for more details on bank account access). It can therefore be assumed that they may not make payments online for this reason, rather than a lack of digital confidence.

The assumption that the online payment activity of 16-17 year olds is more often influenced by bank account access than digital confidence is supported by the reported download and use of apps among those aged 16-17 (at 99%). Conversely, although 89% of the 66+ age group said they make online payments (and 11% said they do not), one fifth of this age group do not download and use apps (21%, compared to 1% among those aged under 26, 2% among the 26-45 age group and 6% among those aged 46-65). This indicates that the digital confidence of those aged 66+ is on a lower level than other age groups. While the majority are comfortable making online payments, they are less likely to do so via an app on their phone.

The previously discussed correlation between age and disability also plays out in relation to internet access and digital confidence. One in ten (10%) of those with mobility issues reported having no internet access on a smart phone, compared to only 2% of those with no disability. This type of disability is more prevalent among those aged 66+. Conversely, those with a mental health condition were more likely than those with other disabilities to download and use apps (97% versus 92% with any disability). Younger respondents (aged under 26) more often reported having a condition affecting their mental health.

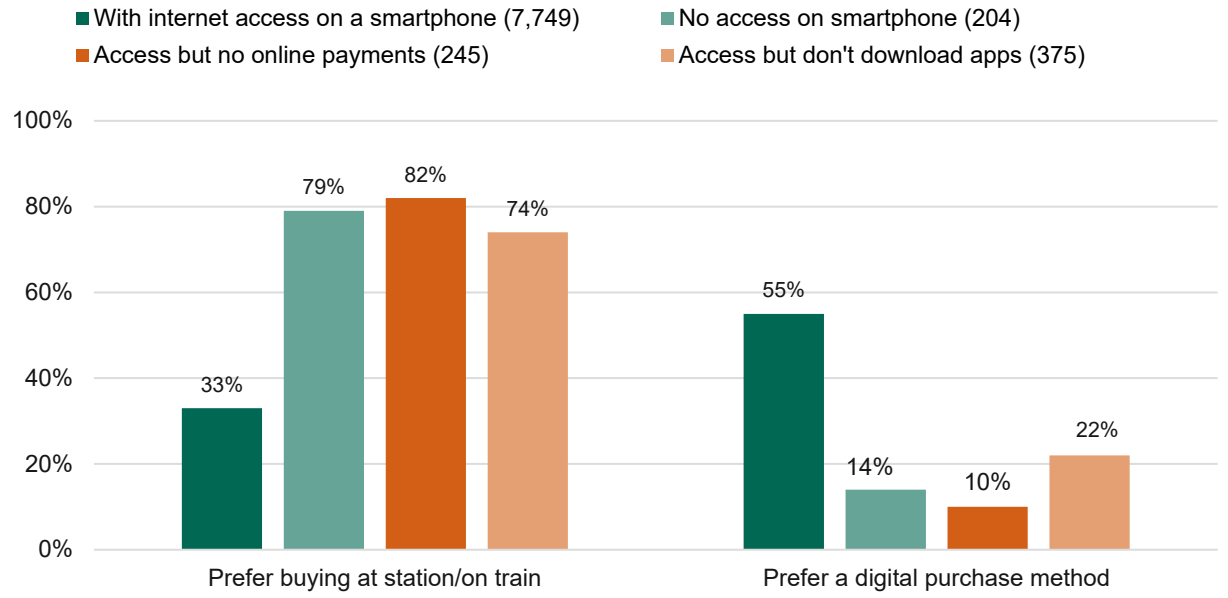
Respondents who reported that they only use cash were also significantly more likely to have no internet on a smartphone at 28% versus 2% for card users.

Ticket purchasing behaviour by internet access and digital confidence

Preferred ticket purchase method

In general, those with no internet access on a smartphone, those with smartphone internet access but not making online payments and those with smartphone internet access but not downloading and using apps reported similar ticket purchasing behaviours and preferences. This suggests that the group of rail passengers who may experience barriers to digital ticketing goes beyond those who simply don't have access to the internet on a smartphone but includes attitudinal and confidence related factors as well. As shown in Figure 30, respondents with no internet access on a smartphone and those with lower digital confidence have a notable preference for purchasing their tickets in person, either at the station or on a train.

Figure 30. Preferred ticket purchase method, by internet access and digital confidence



D2. Which is your preferred ticket purchase method? Base: All respondents, excl. no response (8,001). 'From station/on train' includes 'At a station ticket office', 'At a TVM', 'At a TVM (with assistance), 'From a conductor/on the train' and 'From mobile staff at the station'. 'Digital purchase' includes 'Online (from the train company's website', 'Online (from another website', 'Mobile app from the train company' and 'Another mobile app'.

Preference for purchasing train tickets at a station ticket office was significantly higher among respondents who reported not having internet access on a smartphone (72% vs. 22% among those with access to the internet on a smartphone). This group, which represents 3% of respondents, may not have the option to purchase online (or at least online purchase is likely to be more difficult/less frequent for them).

A similar pattern can be seen for those with lower digital confidence (i.e., those with internet access but who do not make online payments and/or do not download and use apps). Those who have internet access but do not make online payments were more likely than those who make online payments to express a preference for purchasing their tickets at a station ticket office (71% vs. 21% respectively). Those who have internet access but do not download and use apps were more likely than those who do to prefer ticket offices (61% vs. 21% respectively).

As shown in Table 17, respondents with no internet access on a smartphone and those with lower digital confidence more often considered the following factors as important when deciding how to purchase their ticket: using an option that they trust, availability of assistance from staff, accessibility of the station and preference for using cash.

Table 17. Most important factor when deciding how to purchase tickets, by internet access and use

	With internet access on a smartphone	No internet access on a smartphone	With internet access but not making payments online	With internet access but not using their phone to download and use apps
Getting the best priced ticket	47%	31%	29%	35%
Using the quickest option	34%	23%	28%	27%
Using the easiest/most convenient option	23%	11%	17%	18%
Using the option I trust	6%	15%	15%	15%
Preference for purchasing tickets digitally (e.g., via a smartphone)	5%	2%	2%	1%
Preference for purchasing tickets in-person	4%	26%	16%	16%
Habit - I always like to purchase my ticket in the same way	3%	6%	4%	2%
Availability of assistance from staff	2%	11%	7%	8%
Accessibility of the station	1%	7%	5%	4%
Preference for using cash where possible	1%	5%	2%	3%
Preference for using a bank card	1%	1%	2%	2%
I do not know any other ways of purchasing tickets	0.1%	2%	0.0%	0.0%
Other	1%	3%	2%	2%
Don't know	1%	2%	1%	1%
Base	7,664	198	276	371

D3. Overall, what is most important to you when deciding how to purchase your ticket (regardless of journey type)? Base: All respondents, excl. no response (7,906)

Use of websites/apps to purchase train tickets

As might be expected, use of websites and apps when purchasing train tickets is lower among those with no smartphone internet access and those with lower digital confidence. Just over a quarter (27%) of those with no internet access on a smartphone said that they use websites and apps for ticket purchase, compared to 78% of respondents who have smartphone internet access. Similarly, those with internet access but not making online payments were also less likely to say that they use websites and apps to purchase their train tickets (22% vs. 80% among those who make online payments). It is worth noting however that, whilst most of these respondents do not buy train tickets online, it is not necessarily the case that they would not be able to do so if, for example, they were to receive support or reassurance to boost their digital confidence. This topic is further explored in Chapter 4.

Ticket payment methods

Respondents with no smartphone internet access or with low digital confidence were significantly more likely than others to have used cash to pay for their train tickets in the last six months.

- 51% among those with no smartphone internet access, compared with 15% among those with smartphone internet access
- 49% among those with internet access but not making online payments vs. 14% who make online payments
- 39% among those with internet access but not downloading and using apps, compared to 14% who do download/use apps

In line with their higher levels of cash use, use of a credit/debit card to purchase train tickets was significantly lower among those who said they do not make online payments (71% vs. 85% overall).

Ticket fulfilment options

Use of and preference for orange cardboard tickets was higher among those with no smartphone internet access and those with low digital confidence. Seven in ten respondents (71%) with no smartphone internet access said that the orange cardboard ticket is the option they use most often (compared with 33% of those with smartphone internet access). The same proportion (70%) cited this as their preferred option (compared with 27% of those with smartphone internet access).

Use and perceived importance of station ticket offices and staff presence

Of the three percent of respondents who reported they do not have internet access on a smartphone, 74% said they had quite often or regularly used a station ticket office in the last six months, compared to 41% of respondents who have smartphone internet access. Those without smartphone internet access were more likely than those with smartphone internet access to have quite often/regularly used a station ticket office in the last six months to purchase train tickets (67% vs. 26%), to obtain information about fares and tickets (58% vs. 23%), to request refunds (13% vs. 7%), to purchase railcards (27% vs. 12%), obtain information about station facilities (31% vs. 15%) and obtain information about their train journey (56% vs. 26% respectively).

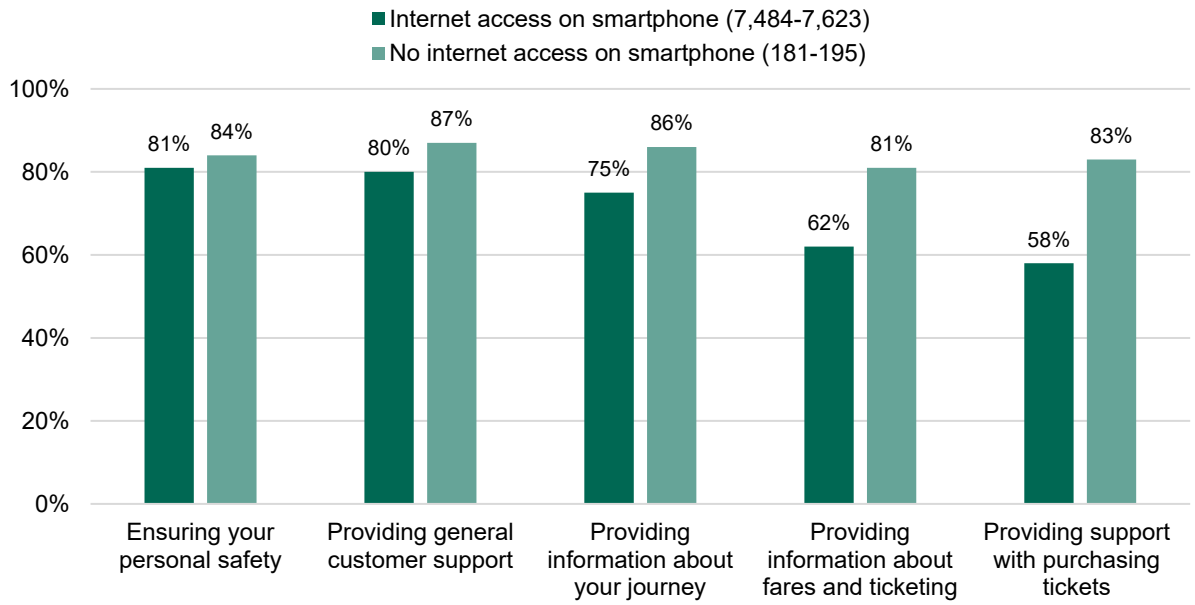
The pattern is similar for those who do not make online payments and those who do not download and use apps.

- Among those who do not make online payments, 71% said they quite often or regularly use a station ticket office for one or more of the purposes listed, compared to 40% who do make online payments.
- Among those who do not download and use apps, 68% said they quite often or regularly use a station ticket office for one or more of the purposes listed, compared to 40% who do download/use apps.

In line with ticket office use, perceived importance of ticket offices is also higher among those with no smartphone internet access and those with lower digital confidence. For example, four fifths (82%) of those with no smartphone internet access said ticket offices were fairly or very important, compared to 55% of those with smartphone internet access.

As shown in Figure 31 below, staff presence for ensuring personal safety is important, regardless of whether a respondent has internet access on a smartphone. However, for all other purposes outlined, the proportion of those saying that staff presence is important is higher among those with no internet access on a smartphone than those with internet access on a smartphone.

Figure 31. Percentage rating staff presence as fairly/very important for the following purposes, by internet access



E1. For you personally, how important or unimportant is the presence of staff for each of the following purposes? Base: All respondents, excl. no response (7,710-7,868)

Again, a similar pattern can be observed for those with internet access but not making payments online and/or not downloading and using apps.

Use and perceived importance of TVMs

Those with no internet access on a smartphone were less likely than those with smartphone internet access to say they had quite often or regularly used a TVM for any purpose in the last six months (23% vs. 43% respectively). This group reported lower TVM use for purchasing train tickets (19% vs. 30% respectively) and for printing pre-purchased train tickets (11% versus 26% respectively). This contrasts with the ticket office use seen amongst these groups, where use was higher among the group with no smartphone internet access.

For all the purposes listed (ticket purchase, printing pre-paid tickets, smartcard/oyster card top-ups, and getting information), those with no internet access on a smartphone placed lower importance on TVM availability than those with smartphone internet access. Two

fifths (42%) reported that having a TVM at the station they travelled from was fairly/very important for the purpose of ticket purchases, compared with 63% among those with internet access on a smartphone. Similarly, 35% said TVMs were important for printing pre-paid tickets, compared with 59% among those with internet access on a smartphone.

Bank account access and cash reliance

Bank account access and cash reliance among rail passengers

Bank account access

Most respondents (97%) said they have at least one type of account for managing their money: 96% said they have a bank or building society account, 3% said they have a credit union current account and 2% said they have a Post Office current account. Just 3% of respondents reported that they do not have access to any of these. In this report, this group is defined as unbanked.

One in five (20%) respondents aged 16-17 years old said they do not have an account. This falls to 6% among those aged 18-25 years old, 3% among those aged 26-45 years old, and drops to 1% among those aged 46 and over.

At an overall level, respondents with any disability were no more or less likely than those with no disability to have access to a bank account (96% vs. 97% respectively). However, differences can be observed when looking at the different health conditions individually. Compared to those with no disability, lower levels of bank account access were reported by respondents with a condition affecting their vision (93%), their learning, understanding or concentration (91%), or a social/behavioural condition (94%). With the exception of the visually impaired, this tends to reflect the age profile of these groups, which tend to be younger.

As might be expected, account access and cash use are linked. However, it is not the case that everyone in the unbanked group only uses cash. In fact, 75% of this group said that they make payments with a debit or credit card. While this is significantly lower than seen for the banked group (99%), it is still on a high level - suggesting that not having an account might not necessarily exclude someone from making digital payments. For example, a rail user aged 16-17 may have a debit card linked to a parent or guardian's account. Alternatively, these respondents may have a credit card that for which a partner or family member's is the main account holder.

Those with no internet access on a smartphone are less likely than those with internet access on a smartphone to have some form of account for managing their money (92% versus 97% respectively).

Furthermore, reported account access is lower among unemployed respondents than those in employment to have an account (92% vs. 98% respectively).

Cash reliance

A small proportion of respondents (2%) reported that they only make payments using cash, equating to 182 people out of the 8,014 respondents who answered this question. As discussed for the unbanked group, it may not be the case that this cash only group have no other payment methods available to them - 71% of this cash only group have a

bank account (compared with 98% of card users) - but it is a strong indicator of preference/cash reliance.

Unbanked respondents (i.e., those who do not have a bank account) were much more likely to say they only use cash to make purchases (16% versus 1% for those who have a bank, building society, post office or credit union account).

The proportion using cash only to make payments was highest among the youngest and oldest respondents: at 4% among those aged 16-17 years old and those aged 66+, although the numbers who only use cash remain small regardless of age. As mentioned previously, those aged 16-17 years old are more likely than others to be unbanked (20% vs. 3% overall), suggesting that cash use is more a necessity than a preference for this group. Conversely, just 1% of those aged 66+ said they do not have a bank account. For this group, there are likely to be other reasons for using only cash (e.g., lack of confidence with or trust in card purchases or digital payments).

Once again, there is a clear overlap between age and disability. Those with any disability were more likely to only use cash to make payments (3% vs. 2% for those with no disability). However, the difference is most pronounced for those with a condition affecting their mobility (at 5%), which was more prevalent in the 66+ age group.

Regional differences can be observed in relation to the use of cash only to make payments, although the proportions were relatively low across the country. Respondents in the East Midlands (3%) and Yorkshire and Humberside regions (3%) were more likely than those in London (1%), South East (2%) and South West (1%) to pay in cash only.

Reported use of cash only was higher among unemployed/not working and retired respondents (5% and 3% respectively), compared to those who are in employment (1%). Furthermore, there is a link between income and use of cash only, with 3% of those with an annual income of £30,000 and under using cash only, compared to only 1% of those with an income over £30,000.

Respondents with low digital confidence were also more likely to say they use cash only to make payments:

- 21% among those with no smartphone internet access, vs. 1% among those with smartphone internet access
- 19% among those who have internet access but do not make online payments, vs. 1% who make online payments; and
- 7% among those who have internet access but do not download and use apps, compared with 1% who do

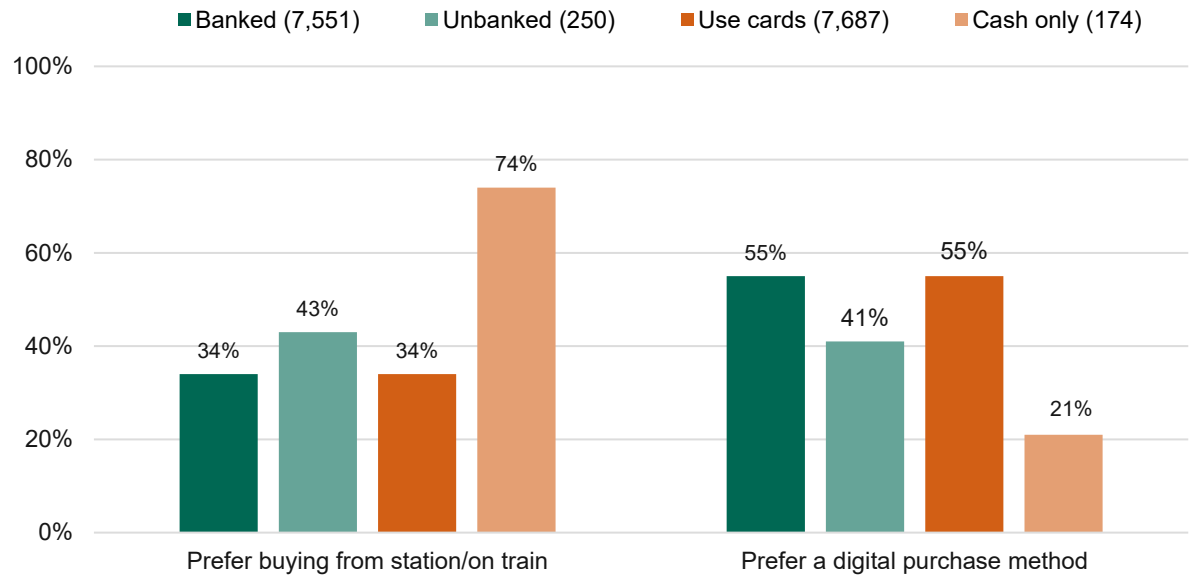
Ticket purchasing behaviour among unbanked and cash reliant rail passengers

Preferred ticket purchase method

As shown in Figure 32, respondents who said they only make cash payments have a notable preference for purchasing their tickets in person, either at the station or on train (74% vs. 21% preference for digital purchase methods). Among unbanked respondents,

preference for at station/on train ticket purchase was on a similar level to preference for digital purchase methods (43% and 41% respectively). However, when compared to those with a bank account, their preference for at station/on train purchase was higher (43% vs. 34% among banked respondents), while preference for a digital purchase method was lower (41% vs. 55% among banked respondents).

Figure 32. Preferred ticket purchase method, by bank account access and cash use



D2. Which is your preferred purchase method, excl. no response (8,001). 'From station/on train' includes 'At a station ticket office', 'At a TVM', 'At a TVM (with assistance), 'From a conductor/on the train' and 'From mobile staff at the station'. 'Digital purchase' includes 'Online (from the train company's website', 'Online (from another website', 'Mobile app from the train company' and 'Another mobile app'.

Cash only respondents showed a clear preference for purchasing their train tickets from a station ticket office. Two thirds (66%) selected this as their preferred ticket purchase method), while just 21% said they preferred a digital payment method. This contrasts with the preferences of card users, among whom 23% cited a preference for ticket office purchase and 55% said they preferred digital. Unbanked respondents also showed higher levels of preference for station ticket offices compared to respondents who have a bank account, but the difference was not as striking (29% vs. 23%).

Getting the best priced ticket and using the quickest option were the top two factors influencing how respondents purchased train tickets, regardless of their cash use or bank account access. However, as shown in Table 18, a higher proportion of cash only respondents vs. card users cited a preference for purchasing tickets in person as the most important factor influencing their ticket purchasing decision (17% versus 4% respectively). For this group, in-person ticket purchase was the third most selected factor affecting their ticket purchasing behaviour.

In contrast, in-person ticket purchase was not a significant factor for unbanked respondents (3% of this group selected this as the most important factor, compared with 4% of those with a bank account).

Table 18. Most important factor when deciding how to purchase tickets, by bank account access and cash use

	Banked	Unbanked	Card users	Cash only
Getting the best priced ticket	46%	39%	47%	24%
Using the quickest option	34%	38%	34%	36%
Using the easiest/most convenient option	23%	19%	23%	16%
Using the option I trust	6%	7%	6%	13%
Preference for purchasing tickets digitally (e.g., via a smartphone)	5%	3%	5%	3%
Preference for purchasing tickets in-person	4%	3%	4%	17%
Habit - I always like to purchase my ticket in the same way	3%	4%	3%	6%
Availability of assistance from staff	2%	3%	1%	8%
Accessibility of the station	1%	2%	1%	4%
Preference for using cash where possible	1%	0%	1%	8%
Preference for using a bank card	1%	1%	1%	0%
I do not know any other ways of purchasing tickets	0.2%	0.3%	0.2%	1%
Other	1%	0.3%	1%	1%
Don't know	0.5%	2%	1%	1%
Base	7,471	240	7,605	170

D3. Overall, what is most important to you when deciding how to purchase your ticket (regardless of journey type)? Base: All respondents excl. no response (7,906)

Cash only respondents were also more likely than card users to cite the following factors as important: preference for purchasing tickets in person (17% vs. 4%), using an option that they trust (13% vs. 6% respectively); preference for using cash (8% vs. 1% respectively), availability of staff (8% vs. 1% respectively), habit (6% vs. 3% respectively) and accessibility of the station (4% vs. 1% respectively) - suggesting that the use of cash is not the only option available to this group but it is the one they feel most comfortable and confident using.

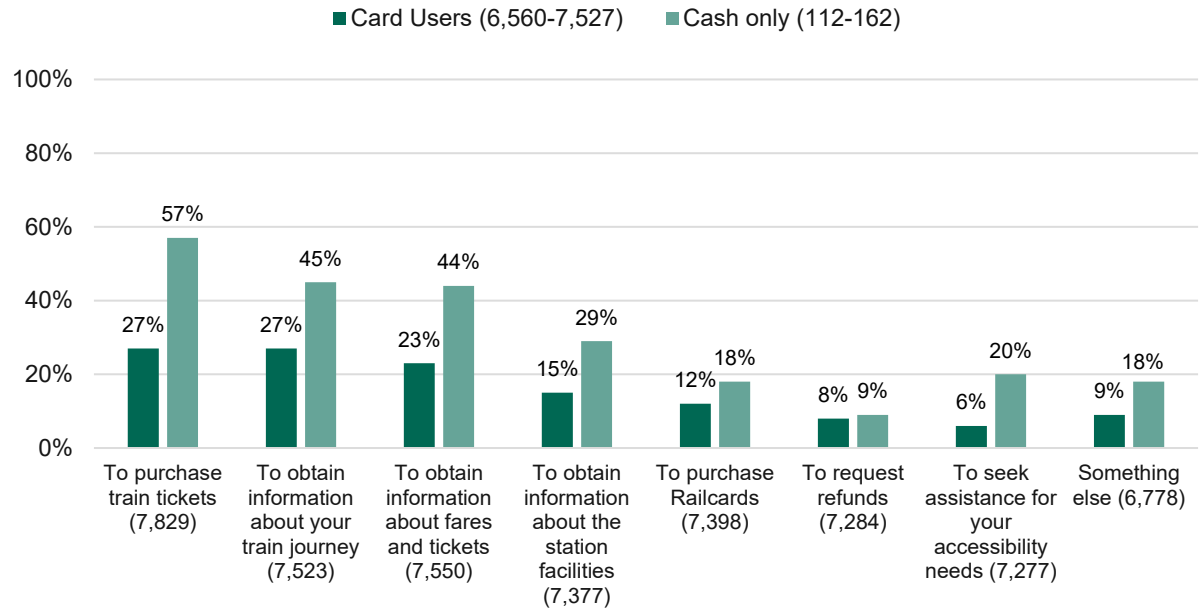
Ticket fulfilment options

Cash only respondents were significantly more likely than card users to say that an orange cardboard ticket is the ticket format they use most often (57% compared to 34% respectively). Similarly, nearly three fifths (57%) of this group expressed a preference for orange cardboard tickets over other options, compared to 27% of card users. As a reason for stated preference, trust is more often cited by cash only respondents than by card users (30% vs. 22% respectively).

Use and perceived importance of station ticket offices

Those who said they only make payments in cash were more likely than card users to use the ticket office quite often or regularly for all of the purposes listed below, except to request refunds.

Figure 33. Percentage quite often/regularly using a station ticket office for the following purposes, by payment method used



E3. How frequently in the past 6 months have you used a station ticket office to do the following? Base: All respondents, excl. no response (6,778-7,829)

It is worth noting here that frequency of ticket office use may be linked to frequency of travel - cash only users who did not report using a ticket office quite often or regularly may still be using the ticket office but on a less frequent basis (possibly because they do not travel regularly). In total, 61% of those who are cash only users bought the ticket they were traveling on when interviewed from the station ticket office (compared to 19% of those who use card to purchase items).

Those who only use cash to make payments placed more personal importance on having a ticket office at the station they travel from than card users (75% rated ticket office presence as fairly or very important vs. 56% respectively).

Use and perceived importance of TVMs

Those who reported that they only make cash payments were less likely than card users to say they quite often or regularly use a TVM to purchase tickets (18% vs. 30% respectively).

Having a TVM at the station they travel from was also of less personal importance to cash only users than to card users for ticket purchases (46% vs. 63% respectively), for printing pre-paid tickets (35% vs. 59% respectively), and for smartcard/Oyster card top-ups (25% vs. 36% respectively).

Children

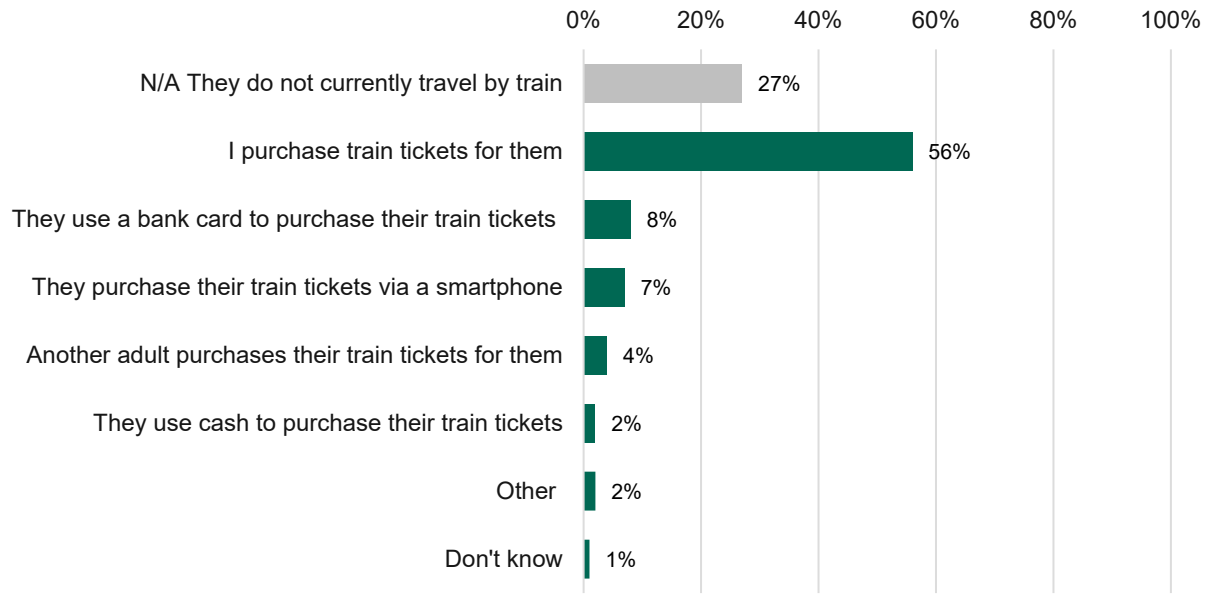
Reported ticket purchasing behaviour for children

One fifth of respondents (20%) said that they have children aged between 5 and 18 years old. This increases to 40% among those aged 36-40, 55% for those aged between 41-45 years and 54% for those aged 46-50 years.

Among respondents with children aged between 5 and 18 years, just over half (56%) said that they purchase their child's train tickets for them. Almost 3 in 10 (27%) reported that their children do not currently travel by train.

As shown in Figure 34, survey respondents reported that their children rarely purchase their own train tickets. In cases where this does happen, bank cards (8%) and smartphones (7%) are the most used payment methods. Cash purchase is rare (2%).

Figure 34. Reported ticket purchasing methods for children



D16. And how do your children purchase their train tickets? Base: Those who have at least one child between 5-18 years old, excl. no response (1,446)

4. Driving modernisation and simplification: response to potential changes

Chapter overview

The Plan for Rail has emphasised the need for modernisation and simplification in many aspects of retailing, including the expansion of digital and contactless ticketing. In this research, respondents were presented with potential ticket and retailing changes that could be considered in line with the intent set out in the Plan for Rail. This chapter explores high-level responses to possible changes, including TVM upgrades, the use of off-station retailers, availability of PAYG and Smartcards, and online/digital options.

Upgrades to Ticket Vending Machines (TVMs)

Likely use of possible TVM upgrades among rail passengers

Respondents were presented with a range of possible TVM upgrades and asked to consider the likelihood that they would use a Ticket Vending Machine (TVM) if these upgrades were implemented. These initiatives included TVMs being:

- upgraded to offer the full range of tickets currently available at ticket offices
- upgraded to offer the full range of tickets AND station staff available to assist in purchasing
- upgraded to offer audio-visual customer support with ticket purchase or other information / journey planning requirements

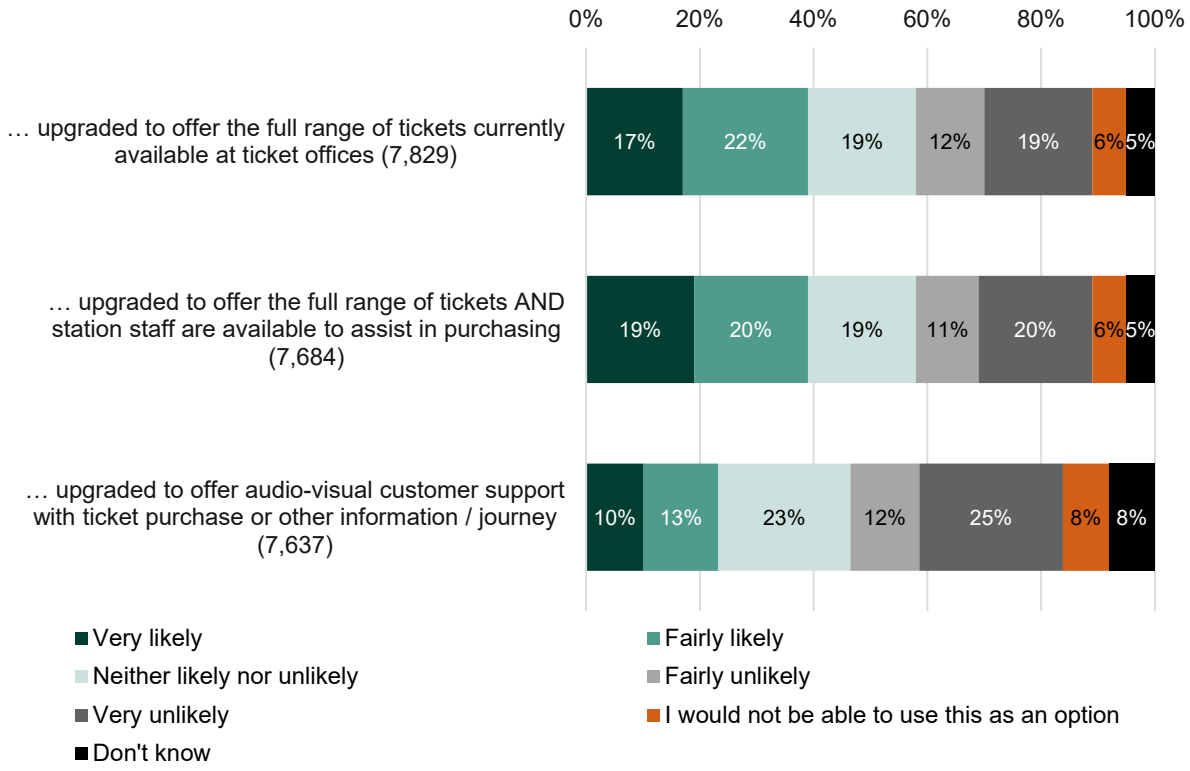
Likely uptake of the upgraded TVMs appears to be closely tied to current use and preferences and this is reflected in the subgroup analysis.

Overall, just under half of all respondents (47%) were fairly or very likely to use a TVM with one or more of the upgrades listed below. This is only a slight increase from the 42% who have used a TVM quite often or regularly for any purpose in the last 6 months, suggesting that the upgrades listed are unlikely to result in a significant increase in TVM use.

Two fifths (41%) of respondents were unlikely to use a TVM with any of the upgrades, and 5% would not be able to use any of the options.

Likely uptake of the individual initiatives at an overall level is shown in Figure 35.

Figure 35. Likely use of a TVM to purchase tickets if they were…



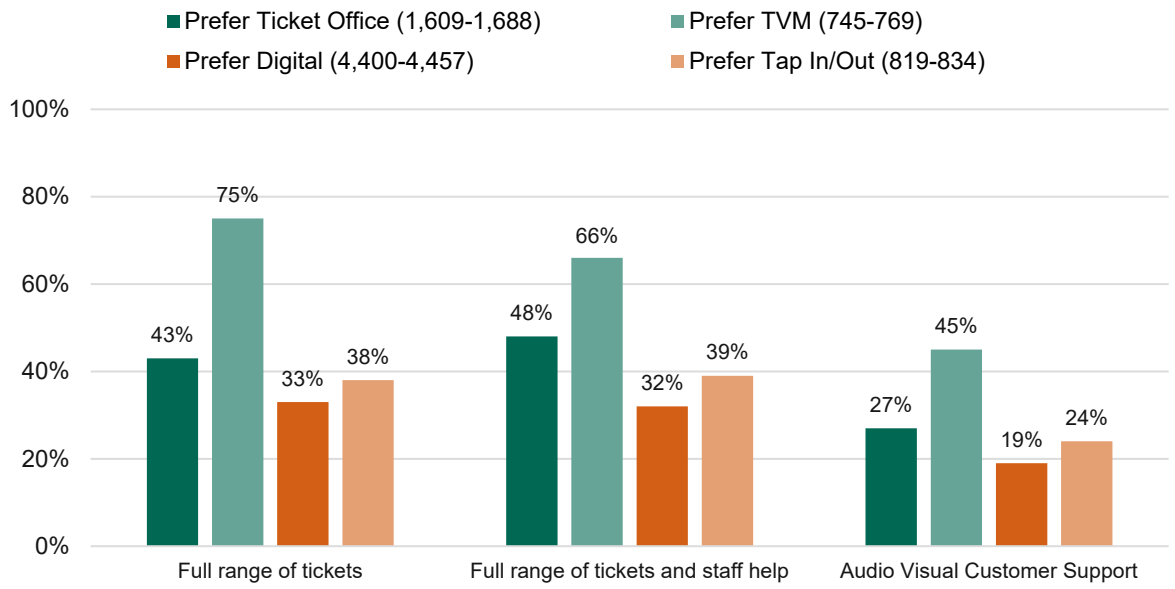
F3. How likely or unlikely would you be to use a Ticket Vending Machine to purchase your train ticket if it is…? Base: All respondents, excl. no response (7,637-7,829)

For certain groups, having staff available to assist them increased their likely use of the potential upgrades. The proportion of respondents aged 66+ who said they were likely to use an upgraded TVM was higher with the addition of 'station staff are available to assist in purchasing' (40% vs. 32% without staff assistance). Those who currently prefer to purchase their ticket at a station ticket office were also more likely to use an upgraded TVM with staff assistance (48% vs. 43% without staff assistance).

In line with the higher importance they placed on staff presence at stations (see Chapter 2), women were more likely than men to say they were fairly or very likely to use the upgraded TVM options that offered support: 42% said they were fairly or very likely to use upgraded TVMs if staff were available to assist in purchasing (compared with 36% of men), and 26% said they were likely to use TVMs that offered audio-visual customer support (versus 22% of men).

As shown in Figure 36, likely use of upgraded TVMs, regardless of upgrade, is much higher among those who cited TVMs as their preferred ticket purchase method. For example, 75% of those who cited a preference for TVMs said that they are likely to use TVMs that are upgraded to offer the full range of tickets, compared to 43% among those who stated a preference for ticket offices, 33% among those who prefer digital methods and 38% among those who prefer tap in/tap out.

Figure 36. Percentage fairly/very likely to use TVM upgrades, by preferred ticket purchase method



F3. How likely or unlikely would you be to use a Ticket Vending Machine to purchase your train ticket if it is…? Base: All respondents, excl. no response (7,652-7,826)

Likely uptake of TVMs that are upgraded to offer the full range of tickets was higher in the South East than any other region (49% vs. 26-41% in other regions), reflecting the higher levels of current use in this region.

Barriers to use of upgraded TVMs

Respondents aged 66+ were significantly more likely than others to say that they would not be able to use a TVM that was upgraded to offer audio-visual customer support (11% vs. 8% for under 26s, 7% for 26-45s, and 7% for 46-65s).

Those with a vision impairment were also more likely to say they would not be able to use this option (13% vs. 8% among those with no disability) - highlighting accessibility concerns that may be associated with this upgrade.

The presence of staff to assist with purchasing has a significant impact on the ability of those with a vision impairment to use TVMs. Without staff assistance, 11% of this group said they would not be able to use an upgraded TVM (significantly higher than the 6% with no disability). This drops to 7% for the option that includes staff assistance (in line with the 6% of respondents overall who said they would not be able to use this option).

Respondents with no access to the internet via a smartphone were significantly more likely than those with access to say that they would not be able to use: a TVM that was upgraded to offer the full range of tickets currently available at ticket offices (18% vs. 6% with smartphone internet access), even if staff were available to assist (17% vs. 6% respectively). Respondents who only make payments in cash were also more likely to say they would not be able to use the proposed TVM upgrades. Nearly one in five (18%) said they would not be able to use a TVM upgraded to offer the full range of tickets (compared to 6% of card users). In this instance the availability of staff to assist or audio-visual support made little difference (16% and 18% respectively said they would not be able to use these upgrades).

Possibility to purchase tickets at an off-station retailer

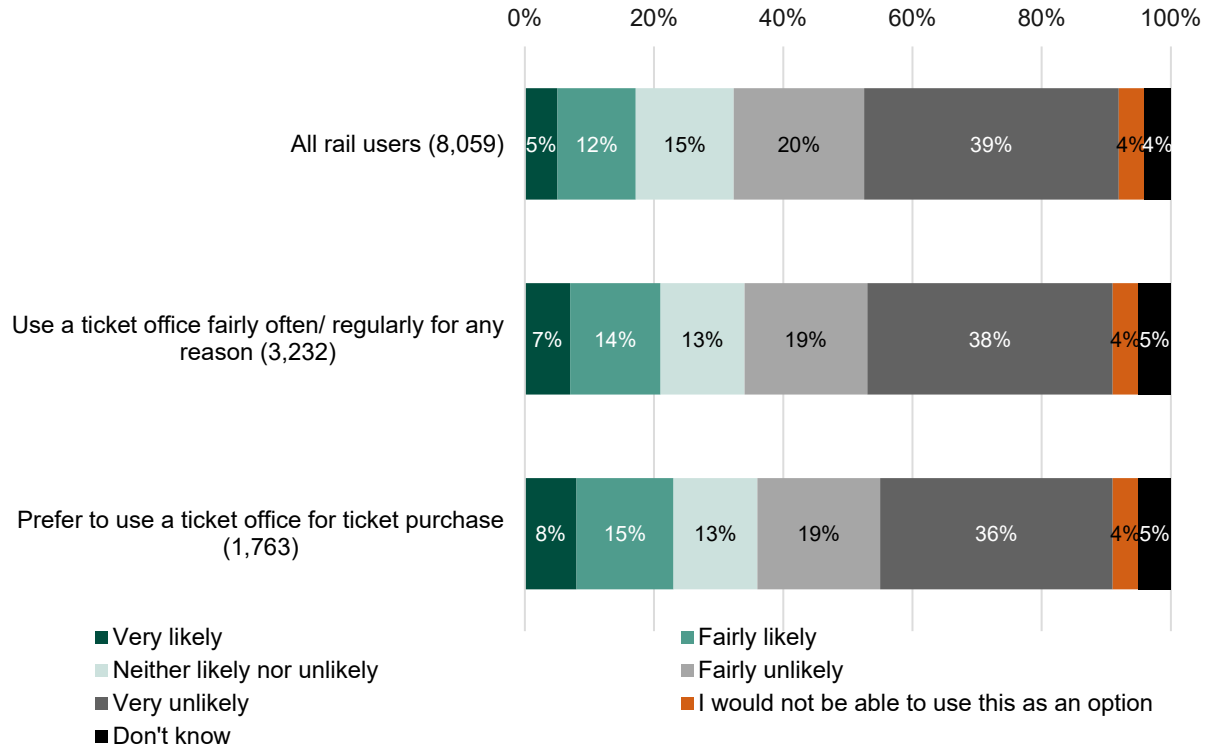
Likely use of off-station retailers for ticket purchase, regardless of ticket office availability

Respondents were asked: 'If it was possible to purchase your train tickets at an off-station retailer (e.g., supermarket, post-office etc.) how likely or unlikely is it that you would use this option?' The question posed did not suggest that any currently available options would not be available.

Overall, likely uptake of an off-station retailer to purchase train tickets was low. Less than one in five (18%) respondents indicated that they would be likely to purchase their tickets from an off-station retailer if this was an option. Three fifths (59%) of respondents said it is unlikely they would use this option. A further 4% indicated that they would not be able to do so.

As shown in Figure 38, likely uptake is slightly higher among who said they currently use a ticket office quite often or regularly (21% vs. 15% who have not), and those who expressed a preference for purchasing tickets at a ticket office (23% vs. 19% among those who prefer TVMs, 16% who prefer digital and 16% who prefer tap in/tap out) but remains on a low level.

Figure 38. Likely use of off-station retailers to purchase train tickets



E5: If it was possible to purchase your train tickets at an off-station retailer (e.g., supermarket, post-office etc.) how likely or unlikely is it that you would use this option? Base: All respondents, excl. no response (8,059)

As might be expected, the percentage saying they are unlikely to use an off-station retailer is higher among those who prefer digital or tap in/tap out purchase methods compared to

those who prefer in-person purchase methods (63% and 60% respectively, compared to 55% who prefer to purchase tickets from a ticket office).

Respondents aged 46-65 expressed the greatest likelihood of using an off-station retailer for ticket purchase (20% vs. 18% among the 26-45s, and 16% for both the under 26 and 66+ age groups).

Women also expressed a higher likelihood of using this option, compared to men (20% vs. 16% respectively). This could be because women are more likely than men to visit off-station retailers (such as supermarkets) on a regular basis. A Savanta panel of over 2000 consumers found that 68% of women said they are responsible for all or most of the food and grocery shopping in their household, compared to 51% of males. (Consumer Compass - Grocery Eye Q2 2023).

Respondents with a condition affecting their mobility were more likely than those with no disability to say that they would not be able to use the option to purchase rail tickets at an off-station retailer (8% vs. 4% respectively).

There were no notable differences in likely uptake across geographical regions. However, this does not mean that uptake would not be affected by where a rail user lives, and the train station(s) that they travel from.

Compared to card users, cash only respondents showed a greater level of indecision regarding possible use of an off-station retailer. Although likely uptake among the cash only group was on a similar level to card users (16% and 18% respectively), the percentage saying they were fairly or very unlikely to use this option was lower among cash only respondents (48% vs. 60% of card users). Nevertheless, the cash only group were more likely than card users to say they would not be able to use this option (8% vs. 4% respectively), reflecting the age profile of this group.

Respondents who indicated that they would be unlikely to use an off-station retailer most often stated inconvenience as the reason for this. Other reasons for not using off-station retailers included: loss of customer service, the need for station staff expertise and access to journey information.

Likely use of other locations if ticket office purchase was not possible

Respondents were asked which other locations they would be likely to use if ticket offices were unavailable for ticket purchase.

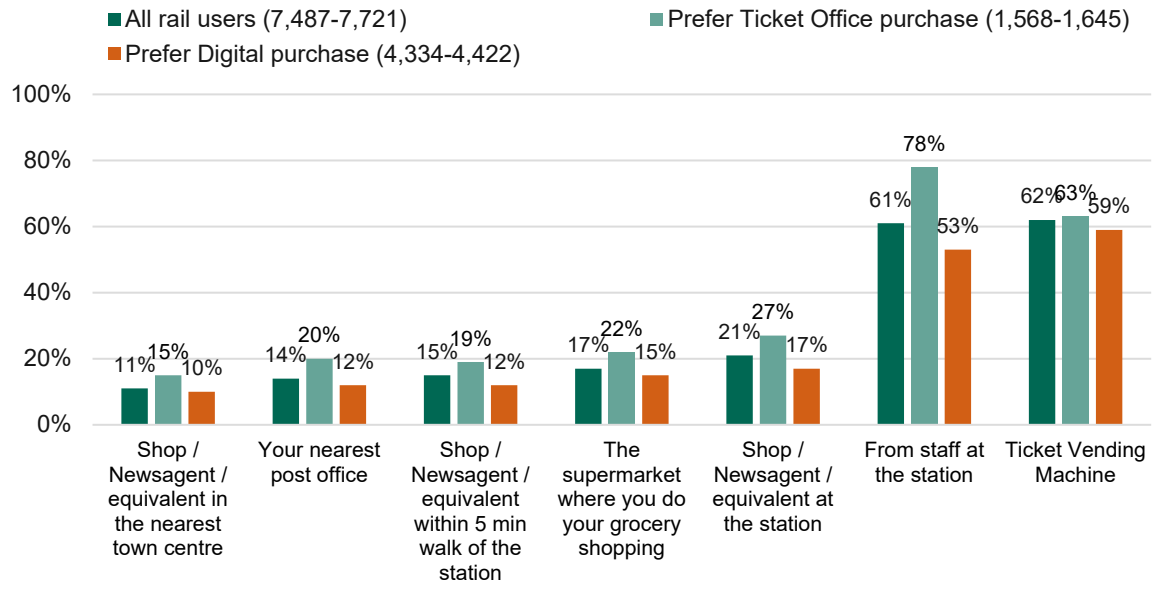
Likely uptake was highest for currently available options, and off-station options were less popular with respondents than options enabling ticket purchase at the station. This is likely due to the perceived inconvenience of buying train tickets away from the station, as outlined previously in the previous section.

TVM and staff at the station were the most popular if ticket offices were unavailable: around six in ten (62%) respondents said they would be likely to use Ticket Vending Machines and 61% said they were likely to purchase from staff at the station. Around one fifth of respondents (21%) said they were likely to purchase train tickets from a shop, newsagent, or equivalent retailer at the station. A shop, newsagent, or equivalent retailer

in the nearest town centre was the least popular option, with just 11% of respondents stating that they were likely to use this option.

Unsurprisingly, those who currently use or prefer digital ticket purchase methods were unlikely to use the off-station ticket office options. As shown in Figure 39, those who prefer to purchase their tickets from a ticket office were most likely to consider other physical options for ticket purchase. Comparable to the overall view, however, is that these groups still much prefer on station purchase options - particularly the option to purchase from staff at the station (78%).

Figure 39. Percentage fairly/very likely to use other options if ticket offices were unavailable



E7: If it was not possible to buy your ticket at a ticket office, how likely or unlikely is it that you would use the following? Base: All respondents, excl. no response (8,132)

As shown in Table 19, those aged 66+ were less likely than the other age groups to say that they would use a TVM, if the ticket office was not available (53% versus 59% for under 26s, 64% for 26-45s and 65% for 46-65s).

However, this older age group were more likely than others to say they would purchase tickets from the nearest post office (19% said they were fairly or very likely to do so, compared with 14% for under 26s, 13% for 26-45s and 15% for 46-65s).

Half (49%) of those aged under 26 said they would be likely to buy from staff at the station, which is significantly lower than other age groups (60% for 26-45s, 67% for 46-65s and 67% for 66+). However, it is likely that this is related to the preference expressed by this group for digital purchase methods.

Buying from a shop/newsagent/equivalent in the nearest town centre was the least appealing option for all respondents.

Table 19. Likely use of off-station retailers to purchase train tickets, by age

	Under 26	26-45	46-65	66+

Ticket Vending Machine	59%	64%	65%	53%
From staff at the station	49%	60%	67%	67%
Shop/Newsagent/equivalent at the station	20%	21%	22%	19%
The supermarket where you do your grocery shopping	17%	16%	19%	18%
Shop/Newsagent/equivalent within 5 min walk of the station	15%	15%	15%	12%
Your nearest post office	14%	13%	15%	19%
Shop/Newsagent/equivalent in town centre	13%	12%	11%	9%
Base	1,545-1,570	2,851-2,905	2,403-2,502	637-712

E7: If it was not possible to buy your ticket at a ticket office, how likely or unlikely is it that you would use the following? Base: All respondents, excl. no response (7,487-7,721)

At an overall level, there were no notable differences between those with any disability and those with no disability. There are, however, some differences according to type of disability. For example, the proportion saying they were fairly or very likely to purchase tickets from staff at the station was higher among those with a condition affecting their mobility or hearing than those with no disability (70% and 69%, vs. 60% among those with no disability).

As shown in Table 20, TVMs and staff at the station are most popular if ticket offices are unavailable, regardless of internet access and level of digital confidence. Although those with no internet access on a smartphone and those with low digital confidence were less likely than others to say they would purchase tickets from a TVM, this was still ranked second in terms of likely uptake for these groups.

Respondents with low digital confidence (i.e., those with internet access but who do not make online payments and/or do not download/use apps) expressed a higher likelihood of purchasing tickets from their local post office, compared with digitally confident respondents. For example, 23% of those who do not make online payments said they were likely to purchase tickets from their local post office if it was not possible to do so at a station ticket office, compared with 14% who do make online payments.

Table 20. Percentage fairly or very likely to use of off-station retailers to purchase tickets, by internet access and use

	With smart-phone internet access	No smart-phone internet access	With access and making online payments	With access but not making online payments	With access and download-ing / using apps	With access but not download-ing / using apps
Ticket Vending Machine	63%	37%	63%	43%	63%	52%
From staff at the station	60%	64%	60%	67%	60%	70%
The supermarket where you do your grocery shopping	17%	13%	17%	20%	17%	19%
Shop / Newsagent / equivalent at the station	21%	16%	21%	25%	21%	23%
Shop / Newsagent / equivalent within 5 min walk of the station	15%	11%	15%	19%	15%	16%

Your nearest post office	14%	18%	14%	23%	14%	22%
Shop / Newsagent / equivalent in the nearest town centre	12%	9%	11%	14%	11%	13%
Base	7,265-7,478	178-195	7,071-7,267	241-262	6,960-7,151	326-347

E7: If it was not possible to buy your ticket at a ticket office, how likely or unlikely is it that you would use the following? Base: All respondents, excl. no response (7,487-7,721)

Among those who only make payments using cash, likely use of TVMs if ticket offices were unavailable was lower than seen for card users (42% vs. 63% respectively). This is likely related to the age profile of this group and the preference they showed for purchasing tickets in person.

Barriers to use of off-station retailers

Four per cent (4%) of respondents stated that they would not be able to use an off-station retailer to purchase their train tickets. This proportion is higher among those aged under 26 (6% vs. 4% among those aged 26 and over), unemployed/not working respondents (6% vs. 4% of employed respondents), and those with a condition affecting their mobility (8% vs. 4% with no disability).

Those who prefer to purchase their tickets at a ticket office were no more likely than those who prefer other purchase methods to say they would not be able to use this option (at 4%).

However, frequency of travel plays a role, with those who travel weekly being more likely to state that they would not be able to use this option than those who travel less often (5%, compared with 3% for monthly travellers and 2% for those who travel less than monthly). This is mainly driven by regular commuters for work and education who are likely to see this as an added inconvenience to their regular journey.

Cash only respondents were significantly more likely than others to state that they would not be able to use an off-station retailer (8% vs. 4% of card users), although this is likely to be linked to the age profile of this group (tending to be 66+), rather than an inability to use cash at another location.

Similarly, the groups that don't have access to the internet on a smartphone (9% vs. 4% with smartphone internet access), those who have access but do not make payments online (7% vs. 4% who make online payments), and those who do not download/use apps (7% vs. 4% who download/use apps) were also more likely to state they would not be able to use an off-station option.

Availability of Pay As You Go (PAYG)

Likely use of Pay As You Go (PAYG)

Pay As You Go (PAYG) currently exists around London and, to a more limited extent, in some other areas (e.g., around Bristol).

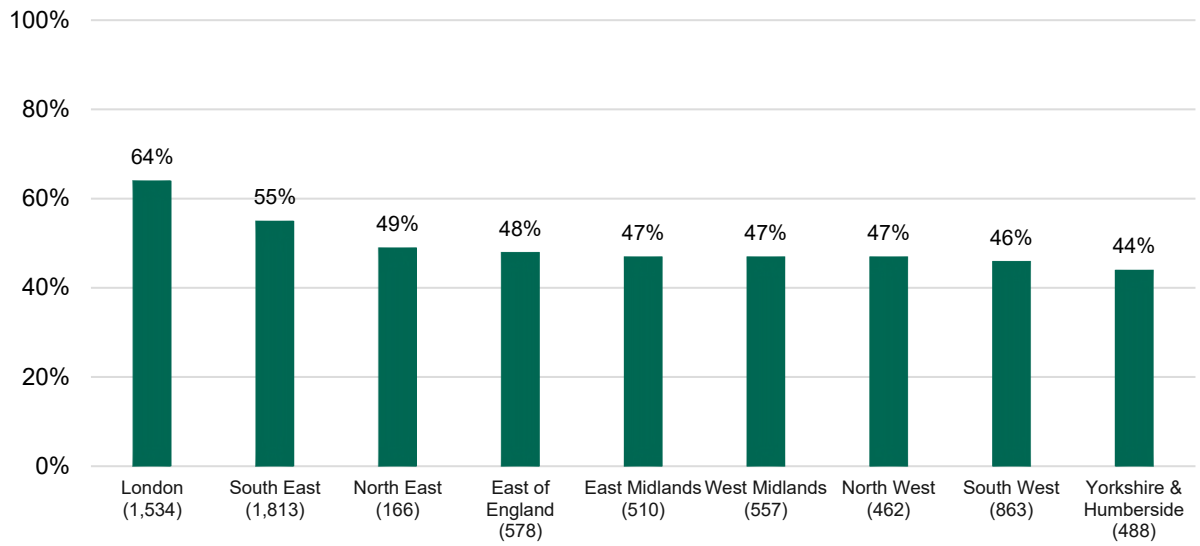
To help understand possible future uptake of PAYG, the research asked all respondents about their likely use of this option, if it was available to them on their journey. The PAYG description presented to respondents was:

Pay As You Go (contactless, Smartcard or compatible mobile device) used to 'tap in' prior to boarding the train and 'tap out' at the end of your journey

Overall, half of respondents (52%) indicated they would be fairly or very likely to use a Pay As You Go option if it was available. One quarter (26%) said this was fairly or very unlikely, 5% said they would not be able to use this option.

Reported likelihood of using PAYG is highest in the regions where this option is already available (64% in London, 55% in South East) and there is, therefore, already greater awareness and experience of use.

Figure 40. Percentage fairly/very likely to use PAYG, by region where respondent lives



G1: How likely or unlikely are you to use the following options, if they were available on your journey? Base: All respondents, excl. no response (7,812)

Frequency of travel has an impact on likely uptake of PAYG. Over half (56%) of those who travel at least once a week said they are likely to use PAYG, compared to 50% among those who travel monthly and 47% among those who travel less than once a month.

It is likely that this is related to journey purpose, in that those who commute for work tend to travel most frequently and cite speed and convenience of purchase as important factors influencing their ticket purchasing behaviour.

In fact, respondents who were commuting for work on the day they were surveyed were more likely than those travelling for leisure to indicate a likelihood that they would use PAYG. Over half (55%) of those commuting for work said they were likely to use PAYG if it was available, compared with 49% of those travelling for leisure.

Barriers to use of PAYG

Five per cent of respondents stated that they would not be able to use PAYG if it was available on their journey. This increases to 12% among those aged 66+.

Those with a condition affecting their vision, mobility, or stamina/breathing were more likely than those with no disability to say they would not be able to use PAYG. The percentage who said they would not be able to use PAYG was 11% among visually impaired respondents, 9% among those with mobility issues and 8% for those with a condition affecting their stamina/breathing, compared to 4% among those with no disability. It is likely that the above-mentioned differences are related to the age profile of these groups.

Cash only respondents were more likely than card users to report that they would not be able to use PAYG. One in five cash only respondents (22%) reported that they wouldn’t be able to use PAYG, compared with just 5% of those who make card payments.

Online and digital purchasing options

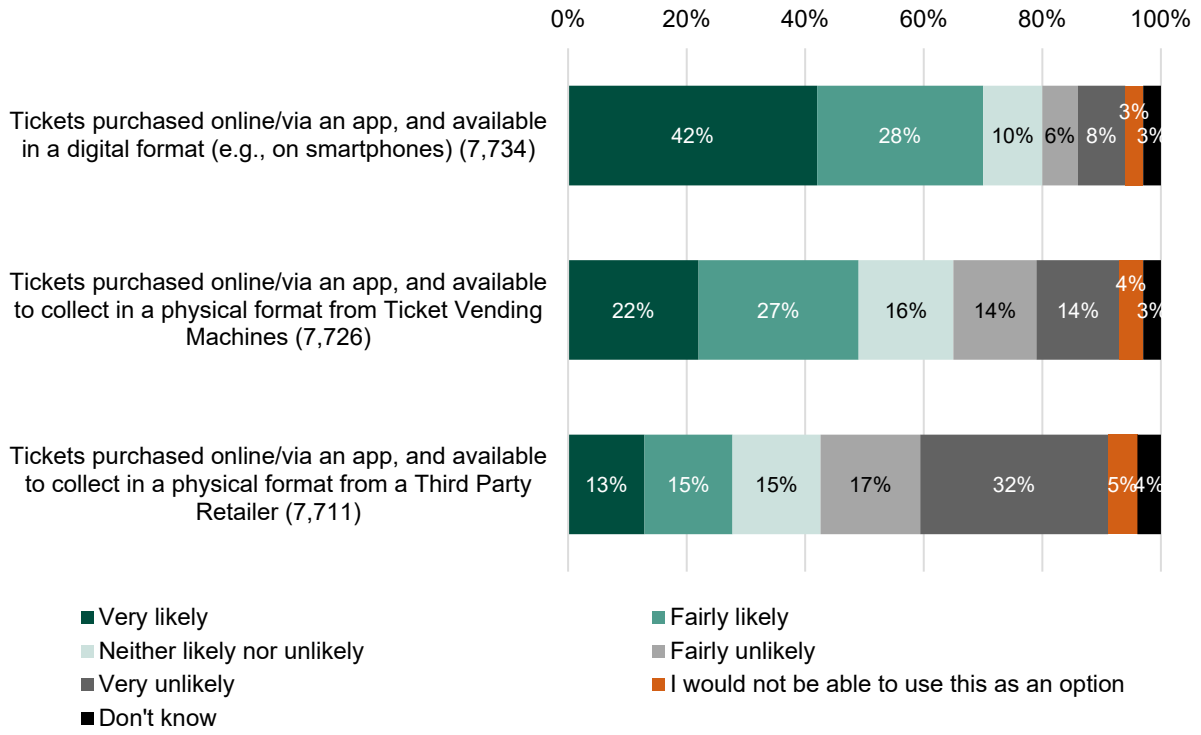
Likely use of online and digital purchasing options

To further understand which groups were most and least likely to use online and digital purchasing options, and which may need to or prefer to collect their ticket at a station or another physical location, respondents were asked to indicate the likelihood that they would use the following:

- Tickets purchased online/via an app, and available in a digital format (e.g., on smartphones)
- Tickets purchased online/via an app, and available to collect in a physical format from Ticket Vending Machines
- Tickets purchased online/via an app, and available to collect in a physical format from a Third Party Retailer (e.g., newsagent, post office, supermarket)

Seven in ten (70%) respondents said they were fairly or very likely to purchase online/via an app if the tickets were available in a digital format (see Figure 45). This is in line with the 77% who said they currently use websites and/or apps to purchase tickets (as reported in Chapter 1).

Figure 41. Likely use of online/digital purchasing options



H1: How likely or unlikely are you to use the following options? Base: All respondents, excl. no response (7,711-,7,734)

Overall, the options to buy tickets digitally and collect a physical ticket from a TVM or third-party retailer were less popular. Half of all respondents (50%) said they were fairly or very

likely to collect a physical format ticket from a TVM, and 27% said they were fairly or very likely to collect their ticket from a third-party retailer.

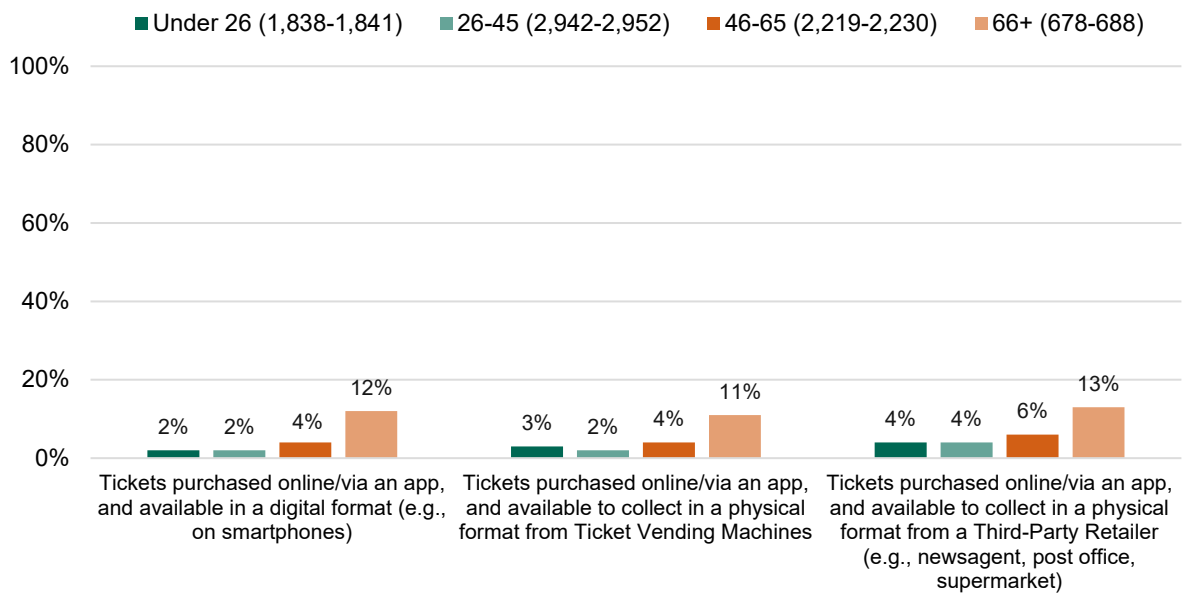
However, for those with no smartphone internet access or low digital confidence, the option to collect their ticket from a TVM increased the likelihood that they would purchase tickets digitally (e.g., 12% of those without smartphone internet access said they were likely to buy and collect from a TVM vs. 7% who would do the same if it was available in digital format). However, as the example shows, likely uptake remains on a low level.

Barriers to use of online and digital purchasing options

A small proportion of respondents reported that they would not be able to use the online purchase options listed (3% said they would not be able to use digital format, 4% said they would not be able to collect in physical format from a TVM and 5% said they would not be able to collect in physical format from a third-party retailer).

As shown in Figure 48, respondents aged 66+ were most likely to say they would not be able to use these options, at 12%, 11% and 13% respectively.

Figure 42. Percentage unable to purchase tickets online/via an app, by age



H1: How likely or unlikely are you to use the following options? Base: All respondents, excl. no response (8,132)

Linked with age, those with certain disabilities were more likely than others to state that they would be unable to use these digital payment options, as illustrated below:

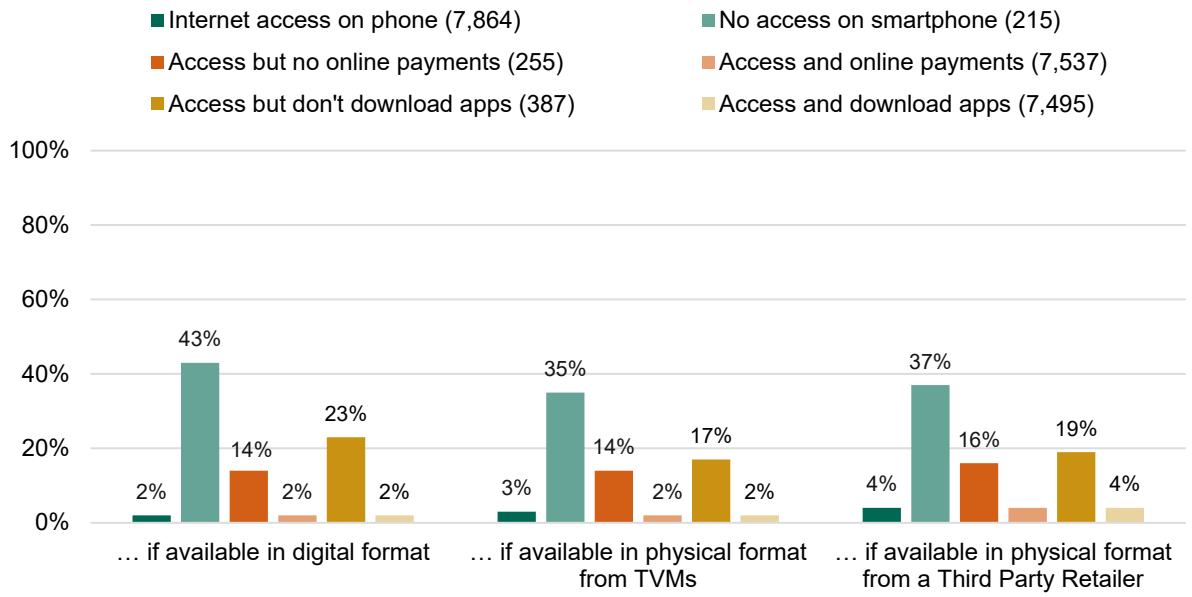
- Tickets purchased online/via an app, and available in a digital format: 3% of non-disabled respondents said they would not be able to use this option. This percentage is significantly higher among those with a condition affecting hearing (11%), mobility (10%), and stamina/breathing (6%).
- Tickets purchased online/via an app, and available to collect in a physical format from Ticket Vending Machines: 3% of non-disabled respondents said they would not

be able to use this option. This is significantly higher among those with a condition affecting their vision (8%), hearing (10%), and mobility (10%).

- Tickets purchased online/via an app, and available to collect in a physical format from a third party retailer: 5% of non-disabled respondents said they would be unable to use this option. This is significantly higher among those with a condition affecting their vision (11%), hearing (11%), and mobility (12%).

As shown in Figure 49, and in line with the differences in likely uptake reported previously, those with no internet access via a smartphone or with low digital confidence were more likely than others to say that they would not be able to use the digital payment options listed. However, the ability to collect a physical ticket from a TVM or third-party retailer does appear to make this option more accessible for some. Two fifths (43%) of those with no internet access on a smartphone indicated that they would not be able to purchase online if the ticket was available in a digital format. This decreases to 37% with the option to collect the ticket from a third-party retailer and 35% with the option to collection the ticket from a ticket vending machine.

Figure 43. Percentage unable to purchase tickets online/via an app, by internet access and digital confidence



H1: How likely or unlikely are you to use the following options? Base: All respondents, excl. no response (8,132)

The percentages of those without internet access on a smartphone who said they would not be able to use the digital purchase options are perhaps lower than might be expected, given their lack of technology required to utilise this method. However, it is possible that these respondents could undertake such transactions elsewhere or with somebody else's help. Additionally, these respondents may be basing their response on the assumption that their personal circumstances may change allowing them to make online payments/use digital tickets in the future.

As illustrated below, cash only respondents were equally likely to say they would not be able to purchase online/via an app, regardless of whether the ticket was available in digital or physical format.

- Tickets purchased online/via an app, and available in a digital format: One fifth of cash only respondents (21%) said they would not be able to use this option compared to only 3% of card users
- Tickets purchased online/via an app, and available to collect in a physical format from Ticket Vending Machines: in line with the above option, 21% of cash only respondents said they would not be able to use this option compared to only 3% of card users
- Tickets purchased online/via an app, and available to collect in a physical format from a Third Party Retailer: similarly, 22% of cash only respondents said they would not be able to use this option compared to 5% of card users

5. Conclusions

Summary

Findings presented in this report represent a snapshot of rail user behaviour and preferences at the time of fieldwork (February-March 2023).

Digital ticket purchasing methods are widely used and preferred: Over three quarters (77%) of respondents said they currently use a website or app to purchase train tickets, and most of this group (72%) reported that they prefer online payment methods. Overall, just over half of respondents (54%) said that they prefer to purchase tickets online, with 56% of this group selecting ‘getting the best price ticket’ as the most important reason for their preference.

Ticket office use extends beyond ticket purchasing: Around a quarter of respondents said they quite often or regularly use a ticket office to purchase tickets (27%), obtain information about train journeys (27%) or obtain information about fares and tickets (24%). One quarter of respondents (24%) said that they prefer to purchase their train tickets from a station ticket office, with getting the best price ticket (36%) and using the quickest option (34%) most often selected as important in this choice. However, trust and in-person purchasing were more important than average to those who prefer ticket office purchase 11% of this group selected 'using the option I trust' as most important in deciding how to purchase their ticket (vs. 6% overall) and 14% selected 'preference for purchasing tickets in-person' as most important (vs. 4% overall).

Staff presence at the station is most often considered important for ensuring personal safety and providing general customer support: The majority of respondents rated staff presence as important for ensuring personal safety (81%) and providing general customer support (80%). The proportion of respondents who rated staff presence important for providing support with purchasing tickets was lower, at 58%.

Regional differences appear to influence purchasing behaviour and preferences: For example, those living in the South East and East of England were most likely to say they use and prefer orange cardboard tickets (with 50% and 47% respectively saying they use these most often, and 38% in both areas saying they were their preferred option) - possibly because this ticket format can be used to travel across London (via Transport for London), something that would likely be of more value to those living in and/or travelling from the areas around London.

Age is a key determinant of purchasing behaviour and preferences: Respondents aged 66+ were more likely than other age groups to face barriers to digital ticketing. Compared to younger respondents, those age 66+ more often reported having no access to the internet on a smartphone, making payments in cash only, and/or having a health condition affecting their mobility, hearing, or dexterity. As might be expected, preference for purchasing tickets from a ticket office was higher for those aged 66+ (48%, vs. 12% for under 26, 19% for 26-45, and 30% for 46-65).

Bank account access is lowest among those aged under 26: One in five (20%) of those aged 16-17 reported they do not have a bank, building society, post office, or credit union account (compared to 6% among those aged 18-26, and 1% among those aged 46+). Overall, preference for ticket office purchase was higher for unbanked respondents, compared to those with a bank account (29% vs. 23% respectively), but the difference is not as striking as seen for other vulnerable groups, including cash users (66% vs. 23% of card users), those with no smartphone internet access (72% vs. 22% with smartphone internet access), and those who don't make online payments (71% vs. 21% who make online payments).