



University of the
West of England

Traveline market research - scoping study

By Professor Glenn Lyons

With contributions from
Dr Erel Avineri, Dr Sendy Farag,
Dr Graham Parkhurst and Peter Wiltshire

FINAL REPORT

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1 Introduction

Overview

In spring 2008 the Centre for Transport & Society (CTS) at the University of the West of England, Bristol (UWE) was commissioned by the Traveline Marketing Group to undertake a scoping study. It has as its starting point three questions:

- how to attract people to use the Traveline service;
- what are the likely future scales of enquiries (notably to the telephone call centres); and
- what can be learnt from existing research (including that commissioned or undertaken by Traveline itself)?

The first stage of the scoping study was to draw together a synthesis of insights from the existing Traveline market research coupled with a synthesis of expert understanding of matters associated with travel choice making, the demand for information and (to a lesser extent) behavioural consequences of information use. A desk study report was produced. This formed the basis for a one-day workshop held on 11 July at UWE, Bristol. The workshop was structured as follows:

- a presentation of key issues from the desk study report by CTS followed by questions and answers;
- a broader discussion, building upon the report, concerning important factors, considerations and knowledge gaps that are deemed relevant to the Marketing Group's concerns; and
- an open discussion of the options for proceeding beyond the scoping study in addressing the three questions above.

This final report for the scoping study combines the desk study report with key points from the workshop including suggestions for possible future market research studies.

Report structure

A number of sources of market research of relevance to Traveline have been identified by Peter Stoner and subsequently examined by the project (these are listed below). The first part of the report goes through these in turn, providing a summary of key points concerning methodological approach and findings, alongside raising issues of relevance to this scoping study. It should be noted that some of the points and issues are in the context of and limited by the extent of information available to be reviewed.

The second part of the report will briefly summarise some broader insights concerning user needs and travel information demands.

The third part of the report then reflects upon these insights and draws out a number of questions and considerations that are believed to be relevant to the interests of the Traveline Marketing Group. These were then the focus of discussion at the workshop (the slides presented at the workshop are included as Appendix 1).

The final part of the report highlights key points from the workshop and goes on to set out a number of research recommendations.

Traveline research and related evidence

Evidence concerning Traveline which is examined in this report is as follows:

1. Scottish Household Survey results for Traveline Scotland, 2005 - a note by the Scottish Executive Transport Statistics branch.
2. Traveline Scotland Customer Research Project, Jan - March 2005.
3. Traveline Scotland contribution to modal shift, 2006 - Hope, S. and King, S. Contribution made by Traveline Scotland to modal shift. A report prepared by MORI Scotland for Scottish Executive Social Research -
4. PTICymru Annual Market Research Report, 2007 - Omnibus in Wales - 952 face-to-face CAPI interviews between 9 and 17 March 2007. Beaufort Research.
5. Traveline East Anglia call centre survey results for Suffolk, 2008 - Slide presentation for Suffolk County Council / Traveline East Anglia by EWA Bespoke Communications, February.
6. Traveline South East call centre customer satisfaction results, December 2007.
7. Traveline web questionnaires for Wales, East Midlands (and East Anglia), 2006/07 - <http://freeonlinesurveys.com/>
8. Traveline performance results for period 17th May to 13th June 2008 - Tripod Consulting Report, 24 June.
9. Kizoom monthly report, March 2008 - Excel datafile.
10. Google Analytics - 1st July 2007 to 30th June 2008.

Some other sources of evidence were provided but, following review, were not considered to offer insights of sufficient relevance to the desk study. These are identified, for completeness as follows:

- Traveline Cymru marketing campaign, 2007 - report by Cara Marshall, marketing officer.
- Socialdata presentation slides on usage of public transport, 2007 - Werner Brog. "Who uses public transport, why and where?" Presented at PT SEMINAR: Learning from 'SUCCESS' to promote Public Transport, 23 April, Preston.
- Socialdata presentation slides on potential to increase patronage, 2007 - Werner Brog. "What is the real potential for increasing use of public transport in Lancashire?" Presented at PT SEMINAR: Learning from 'SUCCESS' to promote Public Transport, 23 April, Preston.

The report also draws upon the research team's knowledge of and involvement with research concerning wider insights into travel information demand. This includes two main resources:

- Strategic review of travel information research, 2007, DfT
- Barriers to travel information use, 2006-08, Centre for Transport & Society

Attendance at the workshop on 11 July

The following individuals participated in the workshop:

Tony Ferguson - Traveline UK
Peter Stoner - Traveline UK

Jo Horton -	Traveline Cymru
Robert Hulbert -	Traveline East Anglia
Andrew Norman -	Traveline East Midlands
Michael Saleeb -	Traveline South East
Andrew Varley -	Traveline North West
Justin Ward -	Traveline Scotland
Robbie Watson -	Traveline South East
Julie Williams -	Traveline South West
Erel Avineri -	Centre for Transport & Society (UWE) - for part of meeting
Sendy Farag -	Centre for Transport & Society (UWE) - for part of meeting
Glenn Lyons -	Centre for Transport & Society (UWE)
Peter Wiltshire -	Centre for Transport & Society (UWE)

2 Traveline market research and evidence

This section of the report provides a synthesis and interpretation of selected evidence relating to Traveline market research to date. For each source of evidence a critical commentary is included where appropriate regarding the research design, the robustness of the findings and the conclusions that can be drawn. For each source of evidence, the key points that arise of relevance to this desk study are highlighted.

2.1 Scottish Household Survey results for Traveline Scotland, 2005

Overview

This note is based on Scottish Household Survey (SHS) data and “describes adults’ answers to some questions about Traveline Scotland, which have been included in the survey since the start of January 2005. The figures given here are based on 10,168 interviews conducted in the first nine months of 2005”. Further details about the SHS are not provided in the note.

Findings

Selected results are as follows:

- Interviewees were asked “Have you heard of Traveline Scotland?”. 16% had done so and, of these people, there was a spread of responses in terms of the sources of their awareness. The most commonly identified source was ‘word of mouth’ at 20%. It is also noted that “[t]hose who drive every day were much less likely than those who never drove to have heard of it from “advert at station, bus stop, airport *etc.*”. It would be instructive to compare such results with the spread of advertising budget across the sources considered.
- According to the note, 5% of all adults (it is assumed this does not refer therefore only to those adults who had heard of Traveline) had used Traveline (though the nature of ‘used’ is not known). “Traveline appeared to be used most by “infrequent” drivers; [of respondents who had heard of Traveline Scotland] 6% of those who drove less often than every day had used Traveline, compared with 4% of those who drove every day and of those who never drove”.
- “*Of those who had ever used Traveline* [original emphasis], 72% had not used it in the past two weeks (though it is not clear what levels of infrequent use this reflects - from less than fortnightly through less than monthly to only used once ever). 18% had used it once in the past two weeks, and 10% had used it twice or more.
- In terms of preferred channel of use amongst respondents who had used Traveline, the distribution of respondents was as follows: telephone - 54%; Internet (PC/laptop) - 49%; and mobile phone using SMS - 1%. Note that respondents were asked how they did prefer to access Traveline not how they would (in future) prefer to access it. It is assumed that respondents could choose more than one response given the figures. However, at the same time the note identifies that “2% said they had no preferred method of contacting Traveline”. Note that it is not known how many people are calling the telephone service while travelling (mobile phone) as opposed to pre-trip (mobile phone or land line). There is a gender difference: for females, 59% prefer telephone while 46% prefer internet (note possible error in reporting since total exceeds 100%); and for males, 45% prefer telephone while 53% prefer internet.
- Views were gathered from those who had heard of Traveline as to which other channels of access to Traveline might be used by people were they to be available (reference in the question was not made to SMS). A combined figure of 33% was found for electronic kiosks at different locations. 19% indicated internet using a mobile

phone and 18% indicated digital TV. It should be questioned how speculative such responses are and how reflective they are of serious intent on the part of respondents.

- “Of those who have used Traveline [original emphasis], 13% said that they had chosen to make a public transport journey as a result of information from Traveline”. However, the question was such that this level of response does not reflect necessarily the proportion of individual Traveline enquiries that lead to a choice to travel by public transport. Note also that the results make no reference to whether the survey asked whether people had chosen not to make a journey by public transport as a result of information from Traveline.

Key points arising

- No dominant source of awareness is apparent. However, there are differences in effectiveness of awareness raising approaches it seems between regular car drivers and non-drivers. Yet in 2.3 below it is found that many call centre enquiries (nearly half) are from regular car users.
- It appears that use of Traveline is not straightforwardly linked to levels of car use. However, there is some suggestion that three groups may be defined: (i) “car-less” - those who never drive and have a greater dependency upon and familiarity with public transport; (ii) “car addict” - those who drive everyday and have less need/inclination to use or be familiar with (local) public transport; and (iii) “car-chooser” - those who drive less regularly through necessity or choice and who are open to using (local) public transport sometimes but who have less familiarity with it.
- Most users (nearly three-quarters) of Traveline use it less than fortnightly and indeed may do so on average even less frequently. The act of using Traveline is not a regular behaviour - this poses challenges for market research which relies upon recall.
- There is some greater preference amongst females for telephone access to Traveline, while amongst males the greater preference is for website access.
- Interest is expressed across a range of prospective future channels of access to Traveline. However, it is not clear how reliable such stated intentions can be taken to be; nor is it clear what the underlying reasons for such intentions/preferences are.
- There is some evidence that use of Traveline is playing a part in people choosing to travel by public transport.

2.2 Traveline Scotland Customer Research Project, January - March 2005

Overview

This was a project with a fixed budget allocation of £2000 which had the aim to “learn more about existing Traveline customers in Scotland and to gauge levels of satisfaction with the Traveline phone service”.

Research design

Two different approaches were considered. The first would have involved seeking agreement from individual callers to call them back and ask the person a series of questions taking up to 3 or 4 minutes. The second option, and the one chosen, involved inviting customers “at the end of a call to participate in an automated survey” which consisted of a up to 90 seconds per survey involving yes/no questions and one likert scale question asking “how would you rate the Traveline service”. This approach was chosen on

the basis of not impacting on the call centre operations, not incurring outgoing call costs and achieving a high number of responses - all within the project budget. Questions addressed age, car access, sources of service awareness and satisfaction. Gender was identified by the call-centre agent when asking if the caller wished to participate.

Specific response rates are not reported but it is noted that “[s]ome agents got the agreement of up to one in three customers to transfer to the survey, others achieved a one in 5 or 6 transfer rate”. 11,455 completed surveys were obtained. It is assumed (but not known) that sampling is broadly representative of the time of day and day or week of enquiries to Traveline.

Findings

Selected findings from this piece of research are as follows:

- 75% of respondents were women. What has not been reported is what proportion of callers asked to participate were women - this would have provided a reflection of the gender balance of calls to Traveline from which the sample were being drawn and also enabling a response rate to be established.
- 57% and 56% of men and women respectively had access to a car. The report concludes from this that “we do know that over half of all callers to Traveline have access to a car but choose to seek public transport information to support them in making a journey by alternative means.” A caveat should really be added to this statement in that it is not clear from the survey what ‘access to a car’ means in practice: for example, an individual may be in a household in which a car is available which they are eligible to drive - and they may answer ‘yes’ - but this car may not be available to them at all times and in particular when they need it. In this example, unless the individual changes the time of their journey to when the car is available they may not be choosing between car and public transport when consulting Traveline.
- 43% of respondents were aware that Traveline had a website (and the report notes that “[w]ebsite use has doubled since the marketing project got underway” - details of the marketing project are not provided in the report).
- 80% and 79% of women and men respectively indicated that they considered the Traveline service to be either good or excellent (though it should be noted that there is no notion of benchmarking here). No remarks are made in the report regarding whether the response sample is biased towards those who are happier with the survey. The report does not indicate how satisfaction varies between first-time and returning users of the service. The survey has also not been able to establish whether respondents were more impressed, for example, by the short response/wait time than the usefulness of the information.
- 39% of women and 43% of men responding to the survey indicated that they were first-time users of the Traveline service. 97% of all respondents would use Traveline again (though the potential response bias towards more satisfied customers pointed to above should again be noted).

The results from this low-budget piece of work are only top level with very limited cross-tabulation of findings.

Key points arising

- Notwithstanding unknown sample biases (including whether women have a greater tendency than men to agree to participate in the survey having called Traveline), it appears that a much greater proportion of Traveline telephone enquiries are from women. What is not known is how distributions of frequency of enquiry vary between

women and men. The Scottish Household Survey results (see 2.1 above) found that 59% of women who had ever used Traveline preferred telephone access.

- Traveline's user base is not confined to those without access to a car. However, 'access to a car' does not necessarily equate to 'have access to a car whenever needed'. It remains unclear what the true *degree of* access is and how this may be changing over time.
- Notwithstanding unknown sample biases, over three-quarters of respondents consider the telephone service to be good or excellent (indeed nearly all would use the service again) while over half of respondents are unaware of a Traveline website existing.
- It would be useful to know how satisfaction with and expectations of the service change, if at all, with repeated use. Apparent high satisfaction from many first time users of the service suggests that the service is intuitive and helpful - however, first time users by definition have yet to put the results of their enquiry to the test in making the planned journey.

2.3 Traveline Scotland contribution to modal shift, 2006

This research for the Scottish Executive reported in 2006 but was based on earlier fieldwork. It set out to examine the contribution made by Traveline Scotland to modal shift.

Overview

The first stage of this research involved a telephone survey with 223 respondents (during 4-18 April 2005) who had been identified in the Scottish Household Survey as willing to be recontacted and who had telephoned Traveline or had used the Traveline internet service. Screening questions at the start of the survey confirmed that only "those people who had used or remembered using a Traveline Scotland Service" would be fully interviewed. The questionnaire interviews each lasted about 10 minutes. In the second stage of the research, a sub-sample (from the telephone survey) of frequent users of Traveline Scotland (where frequent was taken to mean 4+ times or more in the past 12 months) participated in one of two focus groups that took place in Edinburgh and Glasgow in May 2005.

Research design

The research design is commendable in seeking to home in on people with some experience of Traveline and attempting to gauge how the service has been used and with what effect. A key challenge for any research in this area is overcoming difficulties of recall, given that for many people travel information use is an infrequent activity. The two accompanying focus groups included a screen-shot reminder of using the Traveline website and a speakerphone enquiry actually made to Traveline Scotland to listen to a real example of system use. This proved helpful in gauging reactions to the different channels of service provision.

A number of specific observations can be made about the questionnaire survey design. In a screening question asking about whether Traveline Scotland had been used, those who responded 'no' or 'don't know' were not taken further. The 'don't know' category is interesting in relation to the issue of recall/awareness but the numbers giving this answer and not being carried forward were not reported. One question asks for the number of times the Traveline Scotland service has been used in the last 12 months. However, a question is not asked about how long ago the respondent *first* used Traveline Scotland. If

this was within the last 12 months then frequency of use over the last 12 months cannot be appropriately gauged by the question that was asked. Type of journey is addressed in terms of journey purpose. It is later found that use of Traveline and its impacts on mode choice are spread across such purposes. It would be instructive to consider alternative ways of categorising 'type of journey' such as reasons prompting information search. When asking about types of information being sought from Traveline Scotland, one response option was 'Find out if its possible to make a journey/trip'. This might be considered ambiguous. In terms of accessibility provided by public transport services, the interest would concern whether someone feels they can make a journey by public transport in reasonable time, at reasonable cost and with reasonable ease.

Findings

51% of respondents reported using bus at least once a week; 48% reported driving a car 'on most days'. 17% of respondents used both buses and cars at least once a week (compared with only 7% among adults in the Scottish Household Survey). Regular bus use is related to household car ownership - 61% of respondents with no cars in the household use the bus most days; 12% with two or more cars do so. 11% of respondents with no car in the household nevertheless report driving a car on most days. The results reveal that "[f]or visits to family and friends, use of the bus has significantly [not necessarily statistically] increased by 22 percentage points since contacting Traveline Scotland". The report does not explore the nature of the respondent characteristics that underlie this. This said, the report suggests elsewhere that switching modes is not related to respondent demographics (at least in terms of comparing mode-switchers to the respondent sample as a whole). The report goes on to suggest that "Traveline Scotland contributes to modal shift rather than modal shift being dependent on the types of journey respondents make or the types of people who contact TLS [Traveline Scotland]".

The report suggests the possibility that any changes in mode choice resulting from use of Traveline Scotland may go on to be longer-run changes over more than the most immediate journey.

The survey included five statements for which level of agreement was sought from respondents. These statements were taken to correspond to respondent 'groupings' labelled and defined as: peaked - '*I could not use public transport anymore than I currently do*'; constrained - '*I would like to reduce my car use but do not know of any practical alternatives*'; uninformed - '*I would travel more often by public transport if I had reliable information about the services on offer*'; lazy - '*It would be easy for me to reduce my car use*'; and complacent - '*I will always use my car regardless*'. It is not clear why this final grouping in particular is included since this survey only addresses individuals who have sought public transport information from Traveline. Importantly, 48% of respondents strongly agreed or tended to agree with 'uninformed' (37% tended to disagree or strongly disagreed). Within this, a much higher proportion of 16-24 year olds agreed (71%) compared to 45-64 year olds (36%). 54% overall (and reasonably even across age, gender and urban/rural) were 'peaked' - meanwhile 36% strongly disagreed or tended to disagree with this statement. The latter offers an indication of propensity for greater public transport use. The report does not enter into analysis of how individuals' responses to each of the five statements relate to one another (it would be logically possible for someone to agree with at least three of the statements, possibly four).

It is important to note that these 'groupings' are not mutually exclusive. It does however, point to a technique (though it must be stressed - not the technique that has been applied here) for market research that it now gaining prominence in transport, namely segmentation analysis, whereby respondents to a survey are 'clustered' into groups such

that similarities between individuals within a group (according to how they have responded to survey questions) are greater than similarities between groups.

The focus group findings suggested that “[w]here people made a variety of journeys, Traveline Scotland was not used for everyday journeys that were usually made by bus or underground. Rather, participants contacted Traveline Scotland for information about longer, irregular or one-off journeys.”

When asked about preference for contacting Traveline Scotland in the survey, 35% (of those who had used Traveline) preferred telephone and 56% Internet [with a greater tendency amongst males to prefer Internet (60%) than to prefer telephone (24%); and a more balanced preference amongst females for Internet (53%) and telephone (41%)]. (See equivalent results reported earlier in Section 2.1.) There is no strong indication that age substantially influences preferences (see Table 5.4 in the report). However, in the focus groups where participants had a demonstration of both forms of access, in terms of the web service “[m]any people found the journey difficult to follow” and “[o]n the whole, participants were very impressed by the telephone service, preferring it to the website”. This rather prompts the question of how individuals come to align themselves with one channel or the other in practice and whether people try both forms before adopting a preferred means?

The survey revealed only 4% of respondents had used the Traveline Scotland SMS service in the previous 12 months. According to the report, one focus group participant found the SMS service “problematic and illogical” - *“The text through Traveline thing I think would be brilliant, but I don’t know the number of my bus stop, it’s on the bus stop, unless I’m standing there, in which case there’s a timetable”* [Male participant].

There is one reminder in the report from the focus groups that searching for information services may begin through a search engine and thus the service appearing in the first page of search results becomes significant from a marketing perspective - *“I struggled to find it on the Google search, I couldn’t remember its full address and I did a Google search.... I couldn’t find it so I ended up using something else”* [Female participant]. Focus group participants also pointed out that marketing of Traveline Scotland appeared to be ‘preaching to the converted’ with its advertisements at bus shelters and in train stations.

The report summarises that “while information about public transport might be an important factor in facilitating change, the journey itself is key” and goes on to say “Traveline Scotland seems to reinforce public transport decisions rather than bring them about”. Indeed, the report rather aptly concludes with a verbatim comment to this effect, *“Nobody is going to go ‘if I call Traveline they’ll tell me all sorts of things, that’s very exciting! I’ll go and get on a bus, that’s a good idea’. You almost have to suspect the journey’s going to be easy enough to be worth doing before you’re going to phone Traveline to find out how to do it”* [Male participant].

Key points arising

- The focus group findings indicated that enquiries were not so much about everyday journeys but were about exploring possibilities for “longer, irregular, one off journeys”.
- A substantial proportion of callers to Traveline (if survey results are representative) - nearly half - are regular car drivers. Yet from Scottish Household Survey (SHS) findings, “Traveline appeared to be used most by “infrequent” drivers” (see Section 2.1). This raises questions about how to judge confidence levels in research findings with apparently contradictory messages.

- Market orientated segmentation would be a valuable means to better understand the (latent) desire for public transport information and the targeting of advertising campaigns.
- A substantial proportion of callers to Traveline - nearly half - tend to agree with the proposition that they would travel more often by public transport if they had reliable information about the services on offer. This suggests at least that many people recognise that information can be *one of* the barriers to using public transport.
- The study begs the question: What is known about variability in frequency of Traveline use - what distinguishes an individual who is a 'frequent' user from others; and what differences are there in the sorts of enquiries made by infrequent and new/infrequent users?
- Recall is a key issue and presents a challenge for developing a methodology for gaining feedback on awareness and experience (if any) of using Traveline. Whether respondents actually used the information in practice is also a major issue.
- To judge the revenue generation effect of Traveline services it is important to be able to distinguish between an individual enquiry affecting one journey or more than one journey and whether either would have occurred had Traveline not been available.
- Qualitative findings appear to run contrary to quantitative survey findings in terms of access channel preference: the telephone service is considered more usable than the web service. It is not clear how people arrive at their preferences.
- At the time of this work it was not yet clear that an SMS or similar services had a strong potential future demand. It is now clear that 3G mobile phone developments, together with RTI facilities on street and internet available will be very likely to satisfy existing bus users' desires for arrival information.
- Is marketing preaching to the converted? This is a question of relevance to attempts to influence service demand.
- "Traveline Scotland seems to reinforce public transport decisions rather than bring them about". This suggests that a need to find and use a travel information service, while encouraged by a belief that a suitable service may exist (if not an explicit awareness of Traveline), is principally derived from (perceived) level of service of the public transport system itself.

2.4 PTICymru Annual Market Research Report, March 2007

Research design

With quotas set to reflect the demographic profile of Welsh residents, a sample of face-to-face interviews were undertaken in people's homes (one person per household only) using Computer Aided Personal Interviewing (CAPI). 952 interviews were completed during the period 9-17 March 2007. Cross-tabulations are based on weighted data. It should be noted that questions of relevance to Traveline only formed part of the Omnibus survey (and were asked at a late stage) - there were six such questions (Q73-Q78 in the survey).

Findings

Please note - it is unclear in the tabulations of results what the columns 'Would use TL unprompted', 'Used TL prompted' and 'Would/have used TL' refer to.

Selected results are as follows:

- 45% and 26% of respondents indicate they use the bus and train respectively 'at all nowadays'. The figure for bus is highest for the 16-24 age group(64%) and this is true also for train (48%). Only 16% of those aged over 65 say they use the train 'at all nowadays'; the figure is 54% for bus.
- When asked unprompted "If you needed to find out routes and/or times for public transport in Wales, who would you contact to find out on the telephone? Where else?" key results were as follows:

Response	% of total	% of current public transport users (using any of bus, train or coach nowadays)	% of non-public transport users
Wouldn't / don't use public transport	20	2	40
Not sure / don't know / did not answer	26	25	27
National Rail Telephone Advice Line	14	16	12
Traveline / Traveline Cymru	12	14	10

17% of 25-34 year olds indicate Traveline / Traveline Cymru compared to 8% of those aged 55+

- When a similar question is asked, again unprompted, but about finding the information on the internet, key results are as follows:

Response	% of total	% of current public transport users (using any of bus, train or coach nowadays)	% of non-public transport users
Wouldn't / don't use public transport	22	2	44
Not sure / don't know / did not answer	41	50	31
National Rail Telephone Advice Line *	11	13	9
Traveline / Traveline Cymru	11	12	10

* Note - this seems to be an error in the survey design - or reporting - to have included this rather than the response option 'National Rail Enquiries website'

Search engines were only mentioned by 2% of respondents (yet note in the GoogleAnalytics data (see Section 2.10) that 35% of user sessions on the Traveline website come via search engines (mostly Google).

- When results for the two questions (telephone and internet) are combined the 'not sure, don't know or did not answer' category has 19% of respondents (*i.e.*, reflecting those who answer this for both telephone and internet - this is similar for those who use any of bus, train or coach and those who do not use any of these nowadays).
- 4% and 2% of respondents recalling using the Traveline telephone service and website respectively in the last 6 months or so. 52% of respondents do not recall using *any* of the different information services identified in the survey (48% of those who use any of bus, train or coach; 57% of those who do not use any of these). Very small proportions of those not using any of bus, train or coach nowadays claim to have used various of the listed public transport information services. This may suggest that such information services were consulted with a willingness to consider using public transport in mind but that this did not result in information use. Note that of those respondents who do not use any of bus, train or coach nowadays, 87% indicated either 'none of them', 'not sure/don't know' or 'wouldn't/don't use public transport' in response to the question of using sources of information on public transport routes and/or times in the last six months or so. This implies 13% of respondents had used

sources of public transport information in the last 6 months - in spite of claiming not to use public transport nowadays.

- A slightly higher proportion of males claim to have telephoned Traveline in the last six months (4%) compared to females (3%); the reverse is true for using Traveline via the internet (males - 2%; females 3%). It is not apparent, however, that any significant gender difference exists.
- 10% of respondents believed they were aware of Traveline being advertised or promoted in the last 6 months or so - the figure was on average 15% for those who had used one or more of bus, train or coach 'nowadays at all'; it was 7% for those respondents who claimed to use none of these modes. Recall of advertising or promotion was highest amongst 25-34 year olds (17%). Of those who claimed to have heard Traveline advertised/promoted (100 respondents in all), 29% indicated this being on TV, 32% on bus sides, 25% at bus stops, 12% in newspapers, 12% at railway stations (note that response numbers are very small).

Key points arising

- Regardless of whether or not people use public transport nowadays, around three quarters suggest they know/have a means of finding out routes and/or times for public transport in Wales on the telephone. What is not clear is whether or not their known means of finding out would be the most satisfactory/effective. 1 in 10 people who do not use public transport nowadays indicate they are aware of and would use Traveline/Traveline Cymru with the figure being about 1 in 7 for those who currently use public transport.
- Around half of those who currently use public transport seemed unclear whether or how they would be able to obtain public transport information on the internet. In many cases, however, there is an indication that such people would know a means of trying to find out using a telephone.
- Nearly half of those claiming to use public transport nowadays indicated not using any (of the listed) telephone or internet-based public transport information services in the last six months. This suggests either that other sources of information are used and/or that most users of public transport are undertaking familiar journeys for which they have no information need. Twice as many people in Wales had used the Traveline telephone service in the last six months (4%) compared to using Traveline via the internet (2%). However, it is not known whether this difference is statistically significant, as is also the case in terms of gender.
- If not an anomaly of survey design, then a substantial minority of those claiming not to use public transport nowadays have at least considered doing so in the last six months.
- A range of promotional media are responsible for awareness of Traveline although the results do not relate advertising media to whether or not the target market consists of current or non-public transport users.

2.5 Traveline East Anglia call centre survey results for Suffolk, 2008

Overview

The document provided is a set of slides dated February 2008. It is not known whether a full report with full analysis is available elsewhere.

Research design

It is not clear what the methodology was comprised of. It has been suggested however by Peter Stoner that the method was to contact people who had phoned Traveline and agreed to a call back. No information is provided about how long afterwards individuals were called back, about the duration of call back interviews or concerning response rates and any issues of response bias. The survey period was from 17th January to 11th February 2008.

Findings

Results are for Suffolk only (yet Suffolk, with 426 respondents, represents 19% of the total response sample (Norfolk - 55%; Cambridgeshire - 26%)). The results are comprised of individual question response data and some cross-tabulation data. There is no commentary provided with the set of slides. Selected findings (for Suffolk) are as follows:

- 68% of respondents were female. 30% of respondents were over 60.
- 56% of respondents would like to be able to get fare information from the Traveline service. Those aged 41-50 are most likely to want this (78%) and those aged 61-65 least likely (41% - not surprising given concessionary fares). Fare information is most sought by those who were enquiring about a work journey.
- 70% of journey enquiries were for 'pleasure'. Nearly 90% of those over 60 are enquiring about journeys for pleasure. 94% of respondents were enquiring about travel involving bus (84% involving only bus). Around 1 in 5 of those aged 21-50 were enquiring about a journey involving train.
- When asking 'how did you get the Traveline number today' (which suggests, in terms of methodology, that this was NOT a call back interview or that all call backs were made the same day as the Traveline enquiry concerned) there is not a response option for 'have number noted already' - this seems odd given the proportion of respondents reporting regular use of the service. 45% of respondents indicated 'Telephone/Directory'. Meanwhile, 15% indicated website - it is not clear whether this means the Traveline website but in cases where it does this *may* possible reflect a proportion of people who have not considered the Traveline website satisfactory. Across different age groups there is not one dominant source used to get the Traveline number.
- 33% of respondents are first-time users of the Traveline service (source of obtaining the Traveline number has not been analysed by frequency of using Traveline which would have been instructive). 29% of respondents indicate they use the service at least once a week (5% claiming to use it daily). A cross tabulation here to understand the purpose of such enquiries would have been valuable. There is no response option for those wishing to indicate a frequency of less than once a month. 55% of those under 21 claim to use the service at least once a week. This may reflect a high level of weekly leisure travel for this segment of the population. However the figure does appear high and might bring into question whether respondents are clear in their distinction between 'using the Traveline service' and 'using the public transport service for which an enquiry to Traveline is being made'. Indeed it could be suggested that some respondents may be indicating the frequency with which they make use of the information obtained from Traveline as opposed to the frequency of contacting Traveline. 40% of those enquiring for an education trip claim to use the service every week - this does not of course mean every time the service is used it is for education.
- 5% say they have used the Traveline Text service. Those aged under 21 are most likely to have done so (11%).
- 58% responded 'yes' to the question "Has using the Traveline service persuaded you to use public transport rather than other modes?". There are no stark differences across the different age groups. It is not clear from this question whether this implies that the specific call to Traveline that led them to being interviewed has influenced mode

choice or whether respondents (many of whom indicate a high frequency of using the Traveline service) are indicating that their use of Traveline overall has (on occasion) influenced their mode choice. It is also not clear whether alternative information sources in the absence of Traveline would also have led to the use (sometimes) of public transport rather than other modes. The survey does not appear to have tested for occurrence of the reverse situation, i.e. has using Traveline ever resulted in a decision not to use public transport?

Key points arising

- A substantial proportion of respondents are female. However, females may be over-represented in relation to callers to Traveline (see Sections 2.1 and 2.2 for a potential similar issue found in Scotland).
- Just over half of callers to Traveline would like to get fares information - it is not known, however, whether such information is seen by callers as nice to have, important or essential.
- Frequencies of use of the Traveline service appear, according to the survey, rather high with well over a quarter of survey respondents using the service at least once a week. It is not clear what would explain such high frequency - and what types of enquiries this would represent.
- One in ten (5 respondents) of those aged under 21 claim to have used the Traveline Text service.
- Use of Traveline is positively associated with self-reports about decisions to use public transport rather than other modes although the nature and extent of such influence is not clear. It is not known to what extent 'other modes' relates to walking and cycling as opposed to car use.

2.6 Traveline South East call centre customer satisfaction results, Dec 2007

Research design

During December 2007, callers were invited to participate in a call-back interview which took place within seven days of their initial enquiry, with each interview taking 10-15 minutes. 240 interviews were completed. The report indicates that this is approximately 20% of an average day's calls. However, there is no indication of what proportion of callers were invited to participate and thus in turn no indication of the response rate both in terms of those agreeing to be called back and those who then were successfully called back. Another limitation that is likely to apply to other sources of evidence examined in this report as well is that frequent users will tend to be over-represented, as what is being sampled are phone calls in a given period, not directly the user population. Hence users are being sampled in proportion to their use of the system, not strictly speaking randomly from amongst their total population.

Findings

The reported findings are very brief and at high level with no cross-tabulation and only percentage breakdowns for each question asked in the questionnaire interview. The key findings reported are as follows:

- “93% of callers are satisfied with the service” (extremely satisfied - 42%; very satisfied - 41%; fairly satisfied - 10%);
- “85% of callers are satisfied with the accuracy of information” (this is based on 62% considering the information very accurate and 23% considering it quite accurate) - it is not clear how callers can judge accuracy of information until they have attempted to undertake the journey for which the information is being sought;
- “95% of callers will use service again”;
- “96% of callers would recommend the service” to family/friends;
- “75% of enquiries result in a journey being made” (source results not included for this statement);
- “83% of callers plan to make the journey again” (‘yes on a regular basis’ - 40%; and ‘yes but not often’ - 43%; meanwhile ‘one off journey’ was indicated by 14% of respondents); and
- “33% of callers obtain Traveline number from bus/train timetable” - meanwhile 12% claim they obtained the number from the website which raises the question of whether this reflects those dissatisfied with, or uncomfortable using, the Traveline website or whether access to their computer were not available when the enquiry was made (e.g. on street).

The survey did not ask callers whether they would have made the journey if they had not got the information from Traveline. Simon Day from Durham County Council has examined these results and offered a ‘back of envelope’ estimation with assumptions of what this might mean in terms of patronage generation versus cost of Traveline service provision. This suggested that the service, after having accounted for its costs, was revenue generative. However, it is important to note that the report does not address at all the question of any response (optimism) bias in the results.

Key points arising

- Very high proportions of survey respondents are sufficiently satisfied with the service to claim they will use it again and recommend use to others. Notwithstanding an unknown level of sample (optimism) bias this is a strong endorsement of a usable and useful service.
- There is some indication of callers arriving at the telephone service via the web service. This may suggest that (i) some people will search via the internet for availability of information services; and/or (ii) some people even when presented with the web service prefer instead to use the telephone service; or (iii) access to information is needed when a computer is not available or convenient.

2.7 Traveline web questionnaires for Wales and East Midlands, 2006/07

This summary is based upon what information was readily available from the FreeOnlineSurveys.com website.

Overview

Three web questionnaires have been in operation in relation to the websites for the following Traveline regions: East Anglia, East Midlands and Wales. All three use the same questions with one or two variations in relation to coverage, in particular, of Traveline-txt. The East Anglia survey was ‘created’ on 22 June 2007 and has secured only 46 responses, which is too low to consider further. The Wales survey was created on 21 January 2006 and has generated 496 responses. This survey will be the focus of points

highlighted below together with the East Midlands Survey that was created on 15 May 2007 and which has obtained 101 responses.

Research design

It is not evident from the surveys' website what the precise methodology of the surveys was nor over what period the surveys remained open for respondents - 'Survey Active' is still indicated against all three at the time of writing. Indeed, the survey is still available on the Traveline Cymru and Traveline East Midlands websites. In both cases a link to the survey (inviting any website visitors to complete it) is on the homepage of the site (it can only be assumed this has been the case throughout the survey being available). In the case of Traveline Cymru, the user is (depending upon browser settings) required to scroll down the page to see the link. Given the placement of the survey link it is not clear at what point during a visit to the website a user elects to complete the survey. It is assumed that the homepage is not likely to be the natural point of departure from a visit to the website following an enquiry which raises the question of what motivates individuals to return to the homepage to locate the link. What, also, can be said about potential inherent biases in using online questionnaires of this sort? There is evidence to suggest that "web site surveys are biased towards those who are more satisfied with the web site."¹ and "[h]ighly satisfied customers are much more likely to respond to survey requests than merely neutral or even dissatisfied customers."²

Have any features of the websites in question changed during the period for which the survey was open and receiving responses (it is noted from elsewhere that a revised portal design went live on 22 November 2007)?

Some of the question wording used in the survey is a little peculiar - e.g. the question "What transport mode did you use for this journey (or for the main part of the journey)?" is ambiguous - does this refer to how the respondents had previously assumed they would make the journey or to how they propose to do so having just completed a user session on the website? There is also a potential concern over questionnaire operation: 83 respondents for Wales indicated they had used Traveline-txt; 111 then went on to answer the question 'If you have used it, how easy do you think it is to use Traveline-txt?' 15 answered 'don't know' which still leaves 13 respondents who said they had never used it but expressed an opinion about how easy it was to use. In another case respondents are asked "Can you always find the information you required from all your experiences with this Traveline website?" - this would be a peculiar question for first-time service users to answer (which make up over 40% of respondents).

There is another concern with the implementation of the website surveys. At the top of each survey it states "data collection from this questionnaire will only be used by Traveline partners to improve transport information and will not be released to third parties". Yet the survey also displays the University of Newcastle logo which suggests that this commitment to respondents will not be strictly adhered to. Indeed in assessing the response results in preparing this report (as a third party) the same could be said. It is recommended that for future surveys this wording be changed.

It would be helpful to see a greater depth of analysis and associated reporting based on the data collected - the surveys' website online provides only top level findings in terms of

¹ Comley, P. (n.d.). Pop-up Surveys. What works, what doesn't work and what will work in the future. Available at: http://www.europinion.com/news/papers/paper_4.doc

² See http://www.customersatisfactionstrategy.com/surveys_pro_con.html

responses to each question. These findings have been considered and are summarised below.

Findings

The following observations are drawn out from the findings:

- In most cases the profile of responses to a question are similar for the Wales and East Midlands samples - any exceptions are noted in the points below.
- Use of the website is related to a range of journey purposes and indeed over 1 in 4 journey purposes are not considered accounted for by respondents in terms of the categories offered.
- Around 70% of journeys being considered begin and end in the same region. Is this a symptom of each regional website's own limitations?
- Around half of survey respondents have used the website on this occasion to consider a journey they are making for the first time. However, conversely, just over 1 in 5 are considering a journey they make at least once or twice a week. This suggests the possibility that such people are also first-time users of the website (just over 40% of respondents were first-time users) and are thus 'testing' the website to judge how its information compares with what they know to be the case in practice.
- Two-fifths of respondents indicate that their mode choice has not been influenced by using the Traveline website. What proportion of those who have not had their choice influenced are first-time users of the website who may be 'testing' it as noted above? Response options to the question "Did the travel options suggested by the Journey Planner influence your choice of transport mode?" tend to suggest that between 10 and 20% had not come to the website with a prior expectation of which mode(s) of travel to use.
- 18% (5% for East Midlands) claimed to have used Traveline-txt. 56% indicated it was not at all or not very easy to use (the figure for the East Midlands is 18% but 46% for that sample indicated they did not know how easy it was to use). It is very difficult to interpret these results - especially in light of the methodological concern raised earlier.
- Half of the respondents in the Wales sample who had not used it considered they did not need to know about it. Nearly 1 in 4 would like to be sent details about how to use it. It appears that interest from prospective Traveline-txt users is offset by poor experience of usability for many (new) users.
- Substantial proportions of respondents (35-45%) indicated different specific features of the Traveline website were not at all or not very easy to use. It would be helpful for analysis to examine how many of these respondents are first time users, how many consider their mode choice influenced by the service, and how many would (nevertheless) use the website again. Substantial proportions (30-35%) indicated different specific functions were either not at all or not very useful. Around 40% of respondents did not know how useful they considered Traveline-txt to be. Such findings raise the question of whether Traveline website development has been subject to sufficient usability testing.
- Over 1 in 3 respondents considered that 'not at all enough' information had been provided by the service. 43% (49% for East Midlands) indicated that in their experience of using the website they never find or find less than half the time the information they require. This begs the question of whether any of these respondents have indicated they would visit the website again. Over 40% of respondents consider the website not at all easy or not very easy to use in general. A similar proportion (slightly lower) consider the site not at all or not very useful. Likewise over 40% are not at all or not very satisfied with the website. One assumes there may be a strong correlation between the three (ease of use, usefulness and satisfaction) but this would need to be checked. It should be noted that without the benchmark measurement of expectation

it is difficult to fully interpret what views on satisfaction mean (one person can have a low expectation and be very satisfied accordingly while another may have high expectations which cannot be met and is thus dissatisfied). 57% (40% for East Midlands) indicate they will use the website again. Is this consistent at the level of the individual respondent with view on ease of use, usefulness and satisfaction expressed above?

- About half of respondents would use either a telephone enquiry service or a different website to find out the information if they did not use the Traveline website. Only 6% indicated they saw no alternative way: this implies that the Traveline website service is not meeting a gap in the market in terms of information availability and points to the importance of it being able to offer a (much) higher level of ease of access/use than other means of information availability in the market.
- When asked about aspects that would facilitate more use being made of the website, none of the listed aspects attracted responses from more than 12% of the sample - with the exception of fares information which 18% responded to. An option 'none of the above' was not included in the response options. It would be helpful to know how many people would have selected this - which *can* be determined from the data obtained.
- Taking some of the points above together, it remains unclear whether or not adding new functions/features to the Traveline website offering is the most effective course of action to increase levels of use. From the survey data collected a check should be made to see whether people indicating they had not obtained the information they needed are also those indicating they would wish to see new aspects introduced to increase their likely use of the service. What is not clear is whether the list of new aspects indicated in the survey would address the existing concerns over ease of use, usefulness and satisfaction. It could be suggested that the primary source of being able to generate greater levels of use may be the provision of a more usable website that more effectively, in the view of users, delivers existing aspects of the service. This would once again raise the question of website usability and usability testing as a key concern to address.
- Over 40% of respondents had learnt about the website from an online search engine (this is consistent with separate findings from Google Analytics - see Section 2.10). It would be helpful to see what proportion of these respondents are first time users of the service.
- For the Wales survey, the final question provides a free-text response box for people to enter their email addresses if they are willing to participate in a focus group. An appreciable number of respondents have used this response box as an opportunity not to provide their email address but to express (strong) dissatisfaction with the service. The omission of a final question of the form "Is there anything else you would like to tell us about your experience of using Traveline?" may have been an oversight. Peculiarly, many of the (early) 'responses' to this request for email addresses are in fact web addresses and ones of the form which suggest 'inappropriate' use of the survey.

Key points arising

- Being able to interpret any survey results with confidence requires that there is confidence in the suitability of survey design and any implications therein for impacts on response data. There are some significant concerns with this particular survey.
- It is unclear how first-time users of the websites, which constitute a substantial proportion of survey respondents, are 'behaving' in using the site and thus survey responses may not reflect authentic use of the service on future occasions.

- It would appear that high proportions of survey respondents (whether or not reflective of the population of users of the website) are susceptible to their mode choice being influenced. Unfortunately, the survey did not ask about levels of mode use in general of participants hence it cannot be ascertained whether or not the website appears to be serving infrequent users of public transport to a greater extent than frequent or captive public transport users.
- It is difficult to interpret what insights the results provide for Traveline-txt; however it appears that interest from prospective Traveline-txt users is offset by poor experience of usability for many (new) users.
- Very substantial minorities of respondents are not happy with different aspects and functions of the Traveline web offering reflecting problems of ease of use and usefulness. More analysis of results would be helpful here but this implies a need for usability testing of the Traveline websites.
- Few people appear to have no alternative to using the Traveline website. Roughly half of survey respondents would use the website again - the remainder either won't or don't know.
- It remains unclear whether or not adding new functions/features to the Traveline website offering is the most effective course of action to increase levels of use.

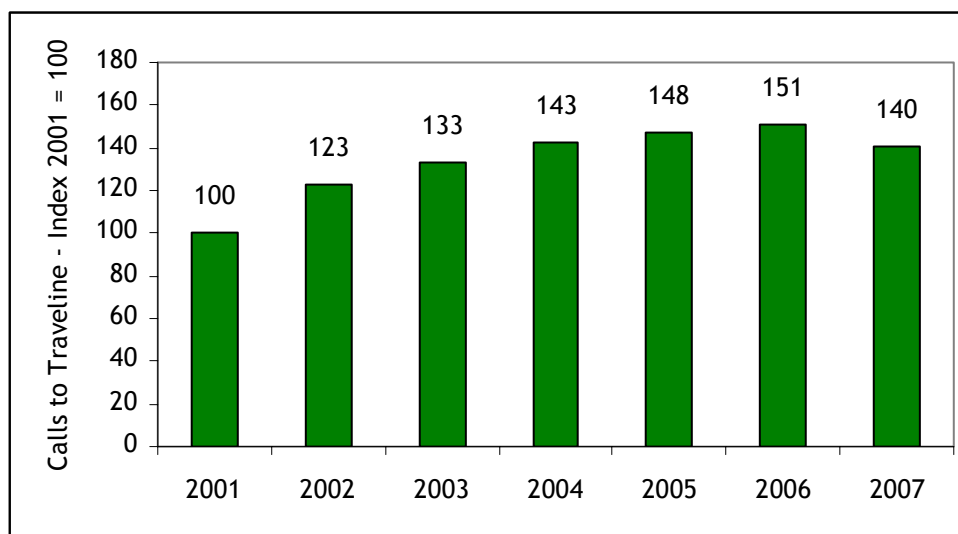
2.8 Traveline performance results for period 17th May to 13th June 2008

Monthly data are gathered on demand for (and performance of) the Traveline call centre operations.

Key points drawn from the latest report are as follows.

Monthly call volumes are all lower in 2008 than for the corresponding months in 2007. For example, overall call attempts for June 2008 are down by 4.8% on June 2007.

The trend in annual BT network calls to Traveline call centres is shown below. Calls received in 2001 were 3.2 million (4.5 million calls for 2007).

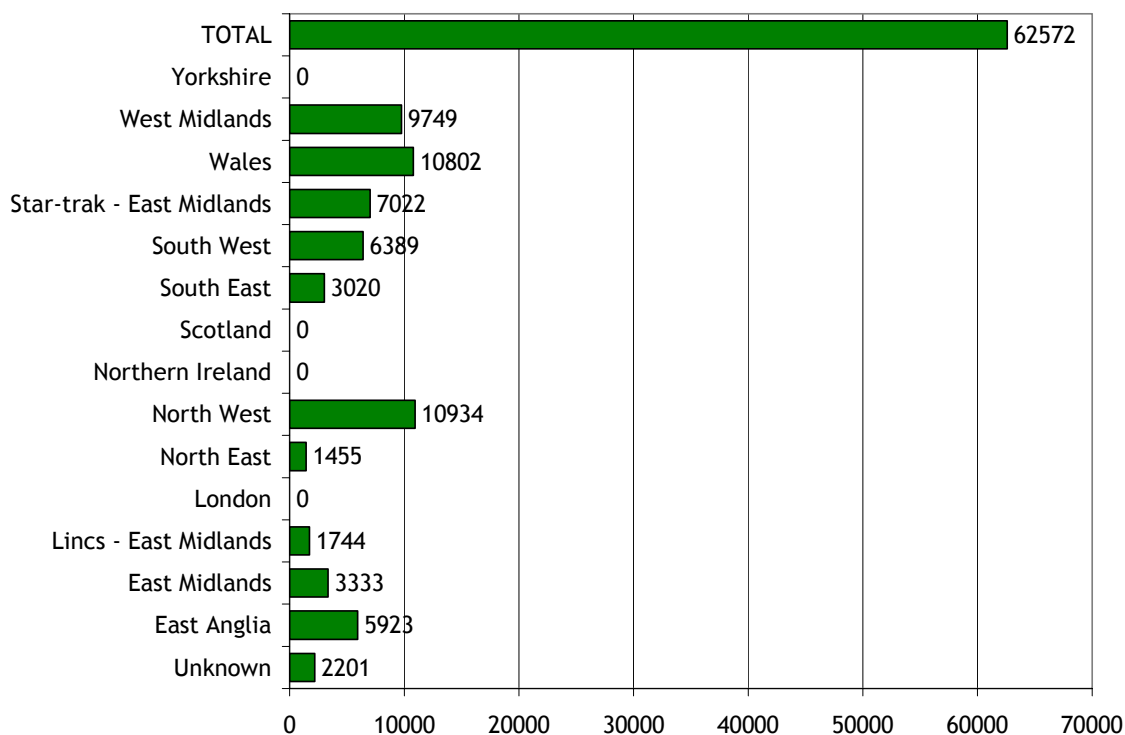


Key points arising

- Year on year growth from 2001 to 2006 has been followed by decline in call centre use for the subsequent two years. Usage nevertheless remains substantially higher than in 2001. In the last year or so 0870/1 numbers have received bad press due to perceived high charges and use of revenues - this may have had some effect upon Traveline.
- It would be helpful to superimpose data for total Traveline website user sessions upon the graph above. At this point it cannot be assumed that decline in use of Traveline call centres overall is a trend that will continue or that decline in use can be explained, fully, by use of other channels (notably the website) to access Traveline. It could be postulated that some of the decline in use is accounted for by previous take-up of latent demand for public transport information coupled with lasting effects of information service use for journeys concerned such that repeated use is not required. It is also not clear the extent to which growth in the use of Transport Direct is diverting prospective users of Traveline via phone and internet. (Use of the Transport Direct website increased from 40,000 to 170,000 'user sessions' /week between March 2005 and March 2007³.)

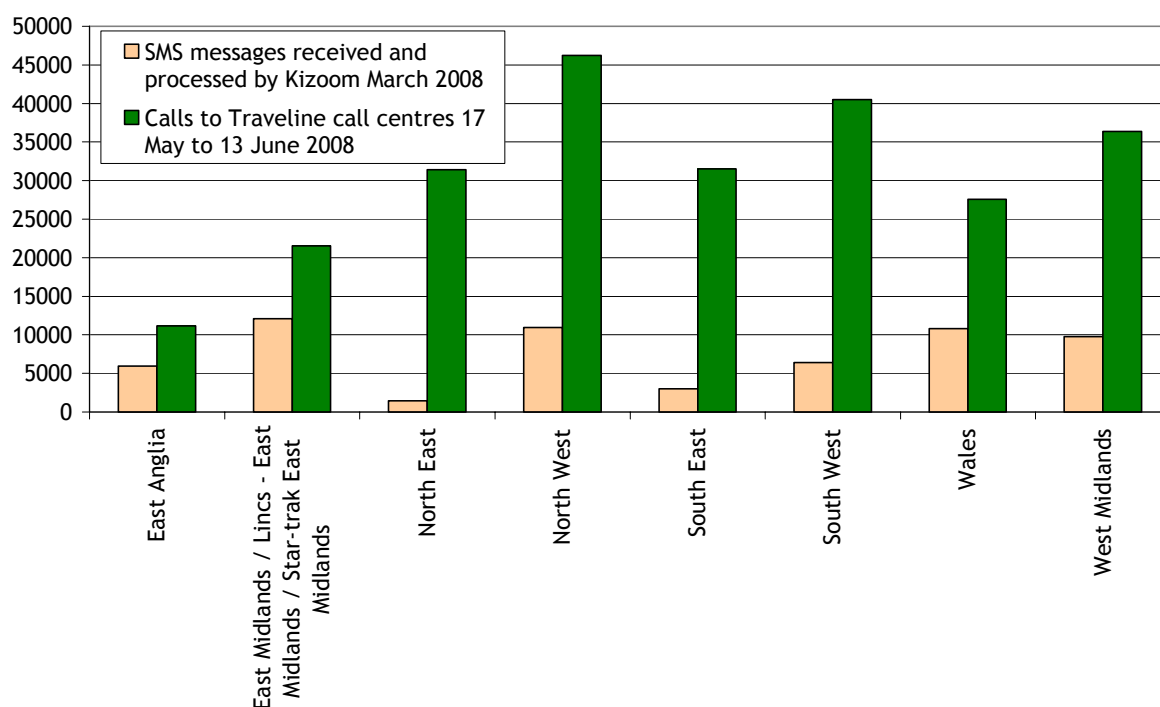
2.9 Kizoom monthly report, March 2008

Monthly reporting data are provided concerning demand for the Traveline SMS (assumed to be the same as Traveline-txt) service. The graph below provides an overview of demand (SMS messages processed) for March 2008. It is assumed regions with zero values are not covered by the SMS service provision.



³ <http://www.dft.gov.uk/transportdirect/about/usagestatistics>

The graph below compares demand for Traveline call centres with that for the SMS service (only for regions where data for both is available).



Key points arising

- Putting the data on SMS service use into context, the total combined calls in May/June 2008 to the call centre regions for which comparable SMS data exists, numbered 246,279. The corresponding number of SMS requests handled was 60,371. Thus in terms of volume, for nearly every four calls made to Traveline call centres, there is a Traveline-txt enquiry (this assumes East Midlands data have been correctly interpreted in terms of aggregation in the graph above).
- At a regional level there is not a consistent correspondence between the level of demand for telephone enquiries and SMS enquiries to Traveline.

2.10 Google Analytics, 2007-2008

Overview

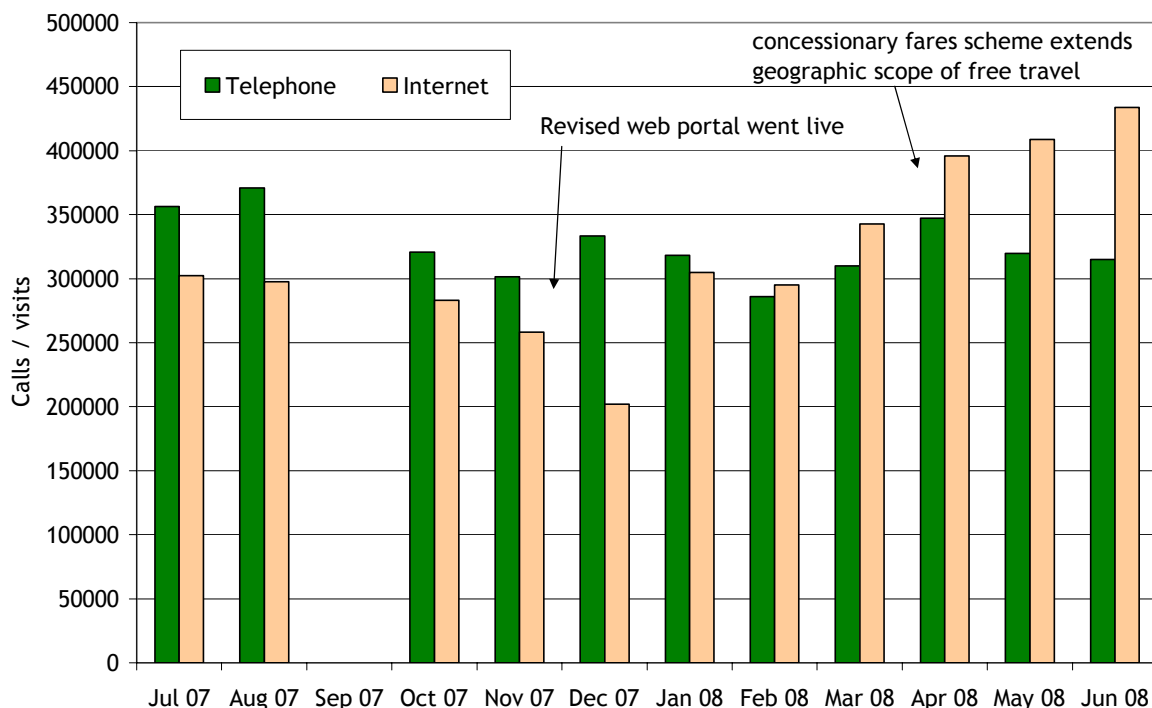
Google Analytics use by Traveline was started mid-May 2007. The following is a summary of key information from the period 1 July 2007 to 30 June 2008 for visits to traveline.org.uk. It should be noted that this is the portal page for Traveline which allows people to identify and go to regional Traveline websites; traveline.info also appears to be a 'mirror' website. Google Analytics is also monitoring Travelinesoutheast.org.uk. Key information from the period 1 July 2007 to 30 June 2008 for visits to this regional website is also included below.

Google Analytics rather casually uses terminology - thus, for example, 'customer loyalty' records the number of times people visited. However, this is not a reflection of the number of times visited in the period of analysis requested but, it appears, the number of visits in a given day.

Findings

Key findings from Google Analytics are as follows:

- Total visits to traveline.org.uk: 3,819,101 (10,434/day on average).
- Total visits to Travelinesoutheast.org.uk: 1,333,298 (3,643/day on average).
- 'Traffic sources' for visits to traveline.org.uk: direct traffic - 21%; search engines - 35% (84% from Google); referring sites - 43% (58% of which from top four referring sites: 39% from arrivabus.co.uk; 9% from nationalrail.co.uk; 7% from stagecoachbus.com; 3% from firstgroup.com).
- 'Traffic sources' for visits to Travelinesoutheast.org.uk: direct traffic - 16%; search engines - 12% (84% from Google); referring sites - 72%. Three quarters of referrals are from traveline.org.uk (62%) and Traveline.info (14%).
- According to the reported data, one third of 'people' (in so far as Google Analytics can distinguish between unique visitors) visit traveline.org.uk more than once in the same day. This raises questions over why this occurs. Two fifths of people visiting Travelinesoutheast.org.uk appears to do so more than once in the same day.
- A comparison of monthly visits to the Traveline portal (traveline.org.uk) and calls to Traveline call centres is provided below. September data is missing because call centre data mixes Aug/Sep and Sep/Oct - accordingly Aug and Oct data shown in the graph for call centres should be treated with caution. On April 1 2006 the Government introduced a concessionary fares scheme in English areas outside London, which allowed free off-peak travel to people over 60 and disabled people within local geographical boundaries approximately consistent with district-tier local authority areas. (Schemes for Wales and Scotland and London had been introduced some years prior.) On April 1 2008 this scheme was extended to allow free off-peak bus travel to English residents in these two groups anywhere in England.



Key points arising

- Notwithstanding that Traveline portal visits does not necessarily equate to actual enquiry sessions resulting at the level of the regional websites, it would appear that demand for internet access to the service is increasing while month on month demand for telephone access is stable or slightly declining. What is currently lacking is annual trend data for internet access to compare with that from 2001 onwards for telephone.
- It is not clear how many people by-pass the portal site and go directly to the regional website of relevance - as such the overall level of demand for internet access to Traveline may be higher. However, it is clear that in the case of the South East, 84% of visits come via a referral site or a search engine.
- Revisions to the portal website and subsequent introduction of the extended concessionary fares scheme *may* have impacted upon levels of monthly demand for internet access to Traveline. However, the importance of such 'externalities' on influencing demand levels is poorly understood.
- It is not clear that sufficiently complete or unambiguous insight is available concerning the nature and scale of use of Traveline online to draw any firm conclusions about future trends - especially given that trends for related (competing) services should also be considered.

3 Wider insights into travel information demand

Introduction and overview

This section of the report draws upon the research team's knowledge of and involvement with research concerning the wider field of travel information. Its aim is to add to the key points arising from the previous section so as to inform a discussion in the final section of the report.

In a recent strategic review of travel information for the Department for Transport, the following was said of the field of travel information⁴:

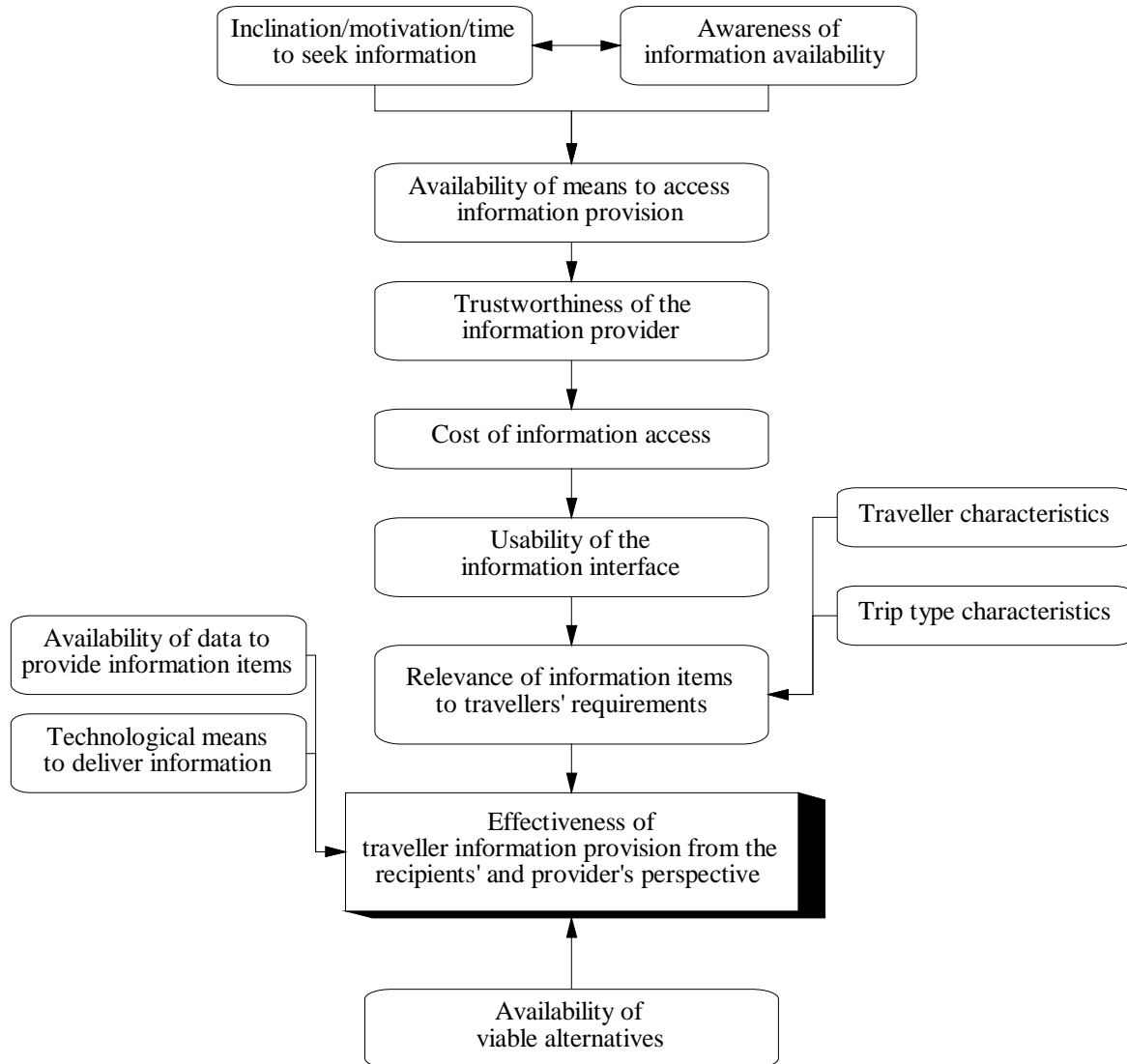
An understanding of the term 'travel information' may appear self-evident. However, upon closer examination it quickly becomes apparent that it reflects a very broad field and set of issues. Information relates to different modes of travel, and is associated with choices about departure time and route. A myriad of specific information can be relevant to these choices concerning time, cost, convenience, comfort, security, and so on. Information can assist both the planning and execution of a journey. It can apply before or during a journey. It can be historic, schedule-based or real-time. It can be text-, graphics- or audio-based. It can be obtained via a number of media - face-to-face, electronic and paper-based. It can be broadcast or personalised. Travellers may use information to assess known alternatives or for generating new travel alternatives they are not familiar with. Information can be provided in a prescriptive way, by making strong recommendations to individuals about travel choices, or in a descriptive way, leaving travellers to determine how best to interpret and use the travel information.

Such diversity underlines both the scope of the field of travel information but also compounds the problem of complexity when it comes to understanding. While there may be a wish to simplify and generalise in order to assist the ongoing development and use of information services, understanding must be derived from empirical examination of specific contexts.

This extract provides an important reminder that to gain a clear, robust understanding of user needs from and desires for travel information requires considerable care and attention in research design and in the interpretation of findings. Nevertheless, it is, of course, possible to identify some generic issues and principles that apply to the field. For instance, the diagram below has been used to frame thinking in the research programme over a number of years for Transport Direct⁵ - it sets out an interpretation of the factors that govern the effective provision of traveller information. This diagram highlights how a number of different barriers can exist, any one of which might be the weakest link in the chain that leads to an information service being used such that it supports the traveller and influences or assists in their choice making.

⁴ Lyons, G., Avineri, E., Farag, S. and Harman, R. (2007). *Strategic Review of Travel Information Research*. The Department for Transport, London.
<http://www.dft.gov.uk/transportdirect/research/overviewandbackground>

⁵ Lyons, G. (2001). From Advanced Towards Effective Traveller Information Systems. In: Hensher, D. Ed. *Travel Behaviour Research The Leading Edge*, Chapter 47, 813-826, International Association for Travel Behaviour Research, Pergamon.



The following two sub-sections address two sources of insight: the first concerns the recent strategic review of evidence referred to above; the second concerns ongoing work at the Centre for Transport & Society at UWE which has been examining barriers to travel information use.

Strategic review of travel information research, 2007, DfT

This review examined developments within the field of travel information research from 2001 onwards. It considered over 100 articles and was focused upon three main themes: understanding choice making; demand for informed choice making; and behavioural consequences of information use.

The diagram below (copied from the DfT report) aims to provide an overview of travel decision making that emerged from the review study. It highlights that the distribution of trips occurring in practice range from familiar and predictable (where information need may be low or nil) to unfamiliar (where information need is likely to be much greater). The (changing) shape of this distribution is likely to fundamentally influence the (changing) level of desire for information. Human beings have different decision mechanisms at work when travel choices are made. At one extreme individuals can be assumed to be 'unboundedly rational' - they wish to be in clear possession of the facts and make the best decision from a set of options that minimises the 'cost' (in terms of time,

money, effort, stress etc) of their travel choices. However, the effort to change behaviour and to identify/reappraise travel choice options can itself reflect a 'cost' in effort, time etc. As such some people, indeed arguably many people, are considered to be 'boundedly rational' - they exhibit what is known as satisficing behaviour - selecting choices that are good enough. Allied to these points, decision making itself can either be unconscious (habitual), may be confirmatory (in relation to a largely familiar journey) or may involve a need for detailed planning and preparation of itineraries. There are of course many sources of information available to most individuals and not all of these concern formally provided information sources. People rely upon their own past experience or instinct; they can be informed by friends, family, colleagues and fellow travellers. For some, these forms of information will be 'good enough'. Since individuals can be seeking confirmatory information then often the travel behaviour effect of consulting information may be nil. However, information may provide an important reassurance to the individual such that it gives confidence to make the intended choice of travel and may reduce the anxieties of making the journey itself.

trip	familiar & predictable	familiar & unpredictable	unfamiliar		
decision mechanism	irrationality	bounded rationality	unbounded rationality		
decision making	unconscious	confirmatory	options & planning		
information source	past experience/instinct	significant others	information services		
behavioural effect	none	destination	mode	route	timing
psychological/physiological/emotional effect	none/unchanged	negative	positive		

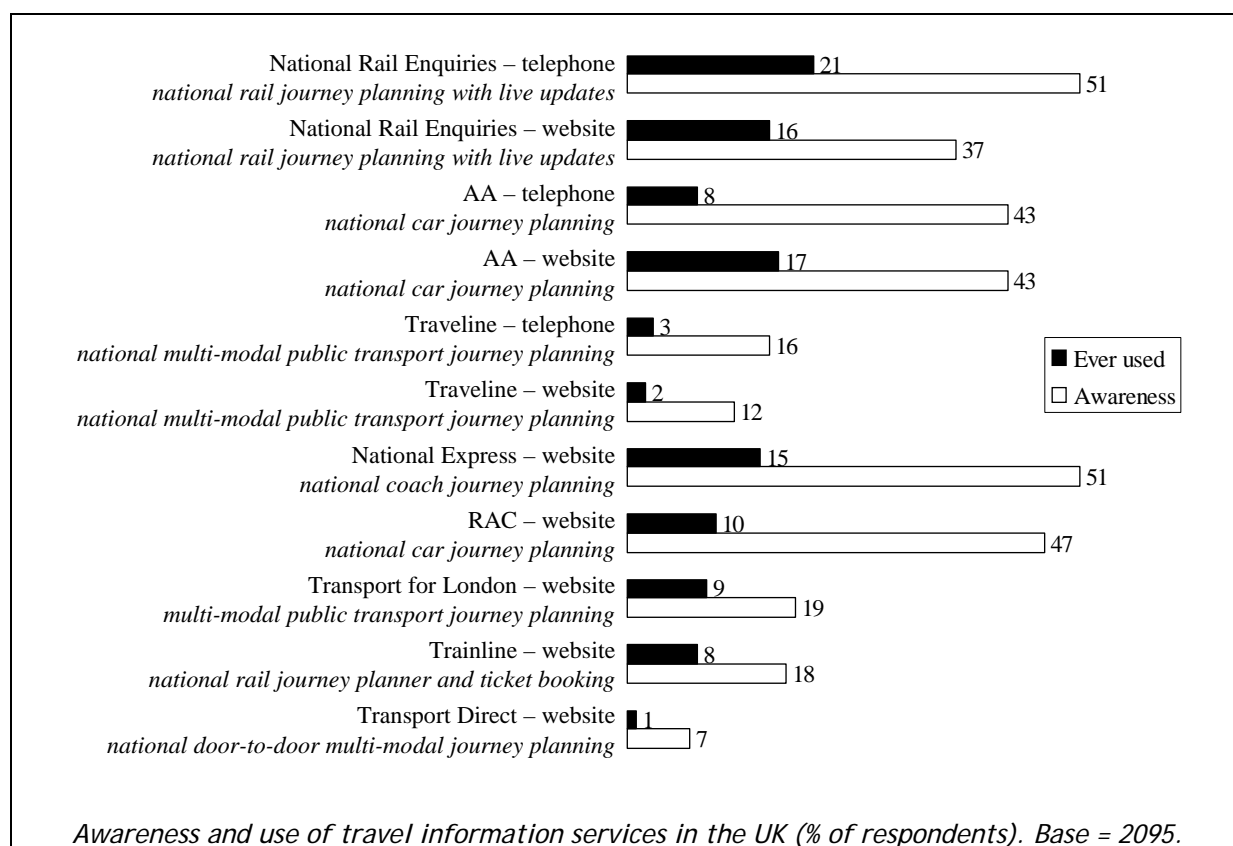
More specific findings of the review, of relevance to this desk study, are as follows:

- It is argued that travellers' limited cognitive resources (gathering travel knowledge, interpreting travel information, and processing it in real time) have a strong effect on travel choice behaviour.
- Levels of awareness and use of a number of key information services in the UK are seemingly rather low as the diagram below⁶ indicates (based on 2007 data from the DfT⁷) It should also be noted (as identified further in the section below) that the results in the diagram represent prompted awareness - *unprompted* awareness is much lower (e.g. 17% for National Rail Enquiries telephone service). It is not, however, altogether clear that lack of awareness is always preventing greater use of given services: there is now a busy information marketplace and people appear to habitually

⁶ Reproduced from Farag, S. and Lyons, G. (2008). What affects pre-trip public transport information use? Empirical results of a qualitative study. Forthcoming in Transportation Research Record.

⁷ GfK NOP (2007). Travel Information Services. Wave 10 - 8th-13th March 2007. Department for Transport.

use given information sources just as they habitually use travel modes in give contexts. Provided that an individual is aware of and using those information services that already meet (most of) their needs then there may be little receptiveness to becoming consciously aware of yet more information services.



- It can be a mistake to assume that people always want to be informed in the way intended. For example the review points towards a study by Chatterjee et al in which in an observed response survey of motorists in London passing a variable message sign displaying immediate warning information only 33% saw the sign.
- Empirical evidence supports the unsurprising finding that unpredictable/unfamiliar conditions give greater rise to information need. Evidence from both the UK and US (though admittedly tending to be more focused, though not exclusively⁸, upon car use) finds that most people do not use any information pre-trip or en-route and that when information is used in most cases it does not affect travel behaviour but serves the purpose of confirmation/reassurance.
- In a study for the Scottish Executive on barriers to modal shift, Halden has pointed towards the failure in information provision to distinguish between experienced and occasional public transport users. This would seem a pertinent observation for Traveline to consider.
- Pointing towards an earlier review for Transport Direct, the review highlights the need to distinguish between information that is considered 'nice to have' and 'essential'.

⁸ Grotenhuis, J., B. W. Wiegman, and P. Rietveld. The Desired Quality of Integrated Multimodal Travel Information in Public Transport: Customer Needs for Time and Effort Savings. *Transport Policy*, Vol. 14, 2007, pp. 27-38.

The former may not be a principal concern in information provision in relation to generating high levels of information use or indeed in relation to influencing travel mode choice. Traveline needs to undertake the necessary market research to make the distinction in considering its future offerings.

- Regrettably, the review observed that “[t]here is little reference to information media associated with public transport”. However, one study in Dublin (by Caulfield et al) is pointed to which investigated information sources used to find public transport information found that 35% of people drew upon existing knowledge, 30% used the Internet and 20% used a mobile phone.
- Transport Direct research undertaken by TTR in 2004 found that in terms of obtaining public transport information, blind and partially sighted and physically disabled people preferred to use the telephone to obtain information.

Barriers to travel information use, 2006-08, Centre for Transport & Society

A study in CTS has specifically set out to learn more about the barriers to travel information use and in particular public transport information use. Examination of background research for this study adds the following to the points made above:

- A longitudinal survey commissioned by Transport Direct has been assessing public transport awareness and use of some of the main travel information services available on a three-monthly basis since 2004⁹ - with each wave involving a representative sample of about 2000 adults. For wave 10, reporting includes awareness and use information for Traveline phone and web services between March 2006 and March 2007. Unprompted awareness of the website was 1% in 2006 and 2% in 2007 - prompted awareness increases to 11% for both years. Unprompted awareness of the telephone service was 3% in 2006 and 4% in 2007 - prompted awareness increases to 14% and 16% for 2006 and 2007 respectively. 2% of respondents recalled using the web service in 2006 and the same for 2007; 3% recalled using the phone service in 2006 and the same for 2007. Of those claiming to have used traveline.org.uk, 18% claimed to do so at least once a month; 47% indicate using it less than every 6 months.
- It is noted that according to the National Travel Survey¹⁰, just less than half of the British population travels less than once a year by train or travels less than once a year by local bus. This suggests it is unlikely that awareness levels of any public transport information services will be able to exceed a certain level.
- Some years ago a substantial marketing campaign was undertaken and its effects studied¹¹ in association with the SmarTraveler telephone information services in the US. The study found that the majority of non-users did not recall being exposed to any marketing mention or advertisement and concluded that most travellers are simply not information seekers. The study is dated but its findings may well remain valid, at least to some extent.

⁹ GfK. Travel Information Services Wave 10 – 8th to 13th March 2007 Department for Transport. UK Department for Transport, 2007

¹⁰ ONS. Transport Statistics Bulletin. National Travel Survey: 2006. Department for Transport. <http://www.dft.gov.uk/162259/162469/221412/221531/223955/322743/NTS2006V3.pdf>

¹¹ Englisher, L.S., Bregman, S. and Pepin, S. (1996). Promoting ATIS Use: The SmarTraveler Experience. Proc. ITS America, 2, 952-968.

- In a state of science review for the Foresight Programme, Lyons proposed that demand for and importance of information into the future will be dictated significantly by:
 - the share of overall travel between familiar and unfamiliar journeys;
 - the extent of stability and predictability of transport system performance; and
 - the extent of change in the relative 'costs' of alternative travel options.

The first phase of this study involved qualitative research consisting of twelve face to face interviews and six focus groups with members of the general public¹². Findings included the following:

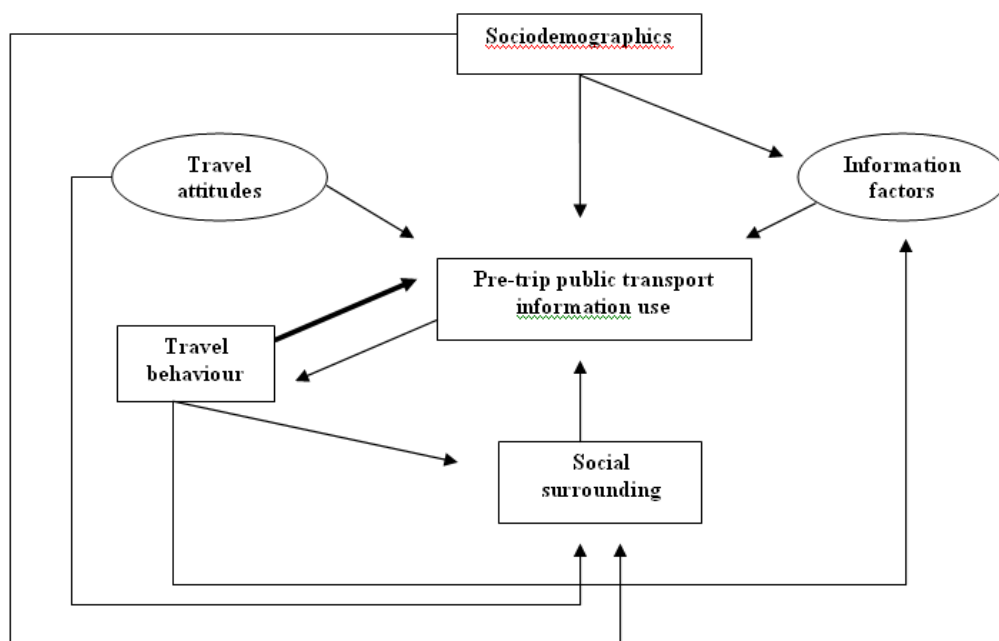
- Most participants indicated that were they to use public transport they would consult public transport information, either for journey planning or for confirmatory information - 'turn up and go' exceptions are if there are no time constraints, if the services concerned run frequently or if the trip is local. Asked about what would take them to use public transport information services more often, many participants replied that they would have to use public transport more often.
- Where information services are used this can include use of specific transport service providers' individual websites - something which may diminish familiarity with and use of larger multi-modal / national or regional information services.
- When examining two 'journey scenarios' in the focus groups, most participants demonstrated either a strong or a slight preference for a certain mode of transport prior to any information search. Thus in turn habit was found to be important for mode choice and subsequently for travel information (non) use.
- Attitudes towards, and false perceptions of, public transport could affect its information use. Thus the perceived availability and suitability of travel alternatives and the level of knowledge about those alternatives could influence attitudes towards travel information use.
- Individuals appear to have a fairly fixed set of travel information sources that they tend to use across different types of journeys. They have a 'default' information source and a second option in case their first choice is not sufficient. Only a few participants had bookmarked travel websites in a 'favourites' folder. Often a search engine is used as a starting point to finding travel information.
- In terms of this study sample, it clearly emerged that the internet was the most often used information source to obtain travel information in general and pre-trip public transport information in particular. Reasons commonly given were: easily accessible from work or home; free; quick; up to date; reliable; possible to book tickets; and easy to print the information.
- Older participants tended to indicate a preference to speak to someone rather than seek information online. However, many participants expressed negative views about (their perception of) using a telephone enquiry line. The difficulty in writing information down and the need to go to the Internet in any case to find the telephone number were two notably reasons given.

¹² Farag, S. and Lyons, G. (2008). What affects pre-trip public transport information use? Empirical results of a qualitative study. Forthcoming in Transportation Research Record.

Subsequent ongoing work within the study has examined the use of pre-trip public transport information for different trip types (leisure, unfamiliar and business) the use of pre-trip public transport information¹³. This has involved a questionnaire survey with 1327 responses from Bristol and Manchester. Five factors have been considered:

1. Travel behaviour (frequency of car use and public transport use);
2. Travel attitudes (towards car and public transport);
3. Information factors (e.g., ease of obtaining, understanding, and trusting public transport information);
4. Social surrounding (e.g., knowing people who use public transport, recommendation of public transport information services by others); and
5. Sociodemographics (e.g., gender, age, education, income, Internet access).

The figure below summarises what structural equation modelling has revealed about the factors and their influence on pre-trip public transport information use.



The main results are:

- Travel behaviour and sociodemographics are found to have the strongest relationship with information use - suggesting that information use may be governed more by the person (and their experience) than the trip itself.
- Importantly, the effect of public transport use on public transport information use is stronger than the other way around.
- In turn it can be suggested that targeting public transport use itself may be more effective in relation to marketing budgets than directly targeting the promotion of public transport information services. Further, it seems that greater demand for public transport information is more likely to be a result of people being motivated to

¹³ Farag, S. and Lyons, G. (2009). Public transport information (non-) use empirically investigated for different trip types. Paper in preparation to be submitted to the 2009 Transportation Research Board Meeting in Washington, January.

consider public transport and *then* finding that information provision exists which facilitates rather than obstructs this, rather than a result of 'improving' information provision. It should be borne in mind that it is contrary to good marketing practice to advertise a poor product making promises that cannot be kept (and this includes timetable information). The product would not then be what it says on the tin.

4 Implications for Traveline from the examination of evidence

This section of the report seeks to take account of the preceding key points drawn out in Section 2, coupled with the wider context set by Section 3. It offers a number of overall observations with implications for how Traveline might need to react in progressing its market research and development of service offerings.

1. Greater awareness of Traveline may not be a precursor to greater user of Traveline - especially in relation to the websites. Referrals from other sites and access via search engines suggest that rather than adopting a marketing approach which has as its goal for more people to be explicitly aware of the Traveline brand, the aim instead should be to ensure that when people are pursuing a need for information (either via other websites - perhaps relating to their journey purposes - or via a search engine) they are readily connected with Traveline. In turn it is then important that the quality of the Traveline web offering has sufficient 'stickiness' from people finding it useful and usable for visitors to become satisfied users, repeat users and advocates of the service by word of mouth to others.
2. From the evidence examined, there seems very little sense at the moment of what sorts of different scenarios characterise the motivations for and use of Traveline. Many respondents to surveys conducted to date have been first time users of Traveline and yet (due in part to the survey constraints) people have not been asked why they have chosen to try Traveline and in what context they are doing so (e.g. (re)planning long term behaviours following a life event versus checking for timetable changes on a familiar service route). This information would better orientate the services to meet customer desires, would facilitate the design of the website and provide the essential information for marketing and advertising strategies. It might also help in the understanding of the trend for an apparently decline in telephone enquiries referred to in bullet point 7 below, (it may, for example, be the case that increasing popularity of flat fares, the greater display of timetable information at bus stops, better operator websites and RTI availability has reduced the need for information previously sought by telephone).
3. There are likely to be different needs from and reactions to Traveline service provision from first time users and returning users. Some first time users will, nevertheless, be experienced public transport users while others will be inexperienced. Again this relates to a need for some sense of the different scenarios of use referred to above to be established. It certainly appears to be the case that substantial proportions of respondents to surveys conducted to date are not captive to public transport in the sense that they have (some degree of) access to a car.
4. The evidence to date specific to Traveline does not provide insight into the timing of Traveline use in relation to the associated journey - to what extent is Traveline used as a pre-trip planning service, versus an on-the-fly pre-departure service versus an in-trip confirmations/re-planning service?
5. Even amongst identified users of Traveline, sessions of use tend to be very infrequent. This suggests that learnability of the service and its offerings will be slower than would be the case for a more regularly undertaken behaviour (such as using word processing software in the office every day). Certainly in the case of the website existing evidence suggests substantial levels of dissatisfaction and it is recommended that strong consideration be given to undertaking (further) usability testing. Indeed account

should be taken of what role the website is performing in an online travel information marketplace that also includes the likes of Transport Direct.

6. It is not clear that it is helpful and indeed may be counterproductive for each Traveline region to have its own website design rather than a common look and feel. If usability testing is to be considered, given the current range of different forms of presentation, then economies of scale would dictate that a common user interface be considered for all regional websites. It might be assumed logical that an optimal design established in one region would readily be identified as optimal for all regions (notwithstanding some region-specific characteristics such as Welsh language for Traveline-Cymru).
7. Apparent high satisfaction from many first time users of the Traveline telephone service suggests that the service is appreciated and valued as being customer orientated with a personalised human contact. Meanwhile the limited research to date (and with some noted caveats about research design) concerning the web service suggest a less complimentary impression from users. However, this appears to sit in contrast to an apparent growth in use of Traveline (alongside growth in use of Transport Direct) on the web. At the same time complimentary views concerning the telephone services are not reflected in what appears to be a declining level of demand (although this could be due to other factors as described in bullet point 2 above). There is, at present, limited trend data concerning use of Traveline websites. Meanwhile, it is not clear what explanation exists for the observed decline in call centre use. It has certainly been found with National Rail Enquiries that the share of demand for telephone access has been declining while the share of demand for internet has been increasing. However, at this point it is not clear whether the declining telephone use is due to use of alternative public transport information channels, alternative information services or due to a decline (or dip) in demand for, most notably, bus service information.
8. In the information marketplace, with the likes of NRES and Transport Direct, it becomes increasingly important to see which elements of market demand for information are being met by each service. Little is also known about how individuals use the different services in combination to address their different journey needs in different contexts. For instance, it may be the case that, in spite of some demand expressed for fares information, this is principally directed at rail travel rather than bus travel and as such is already being met when needed by visiting NRES or alternative existing providers of fares information. As such Traveline may be competing in the market rather than uniquely addressing a market need.
9. There is not clear and compelling evidence to date concerning public need or desire for different channels of delivery of Traveline or different service offerings in terms of aspects and functions (of the sort listed in the Traveline Cymru web survey). Some contradictory evidence even exists in terms of gender-based preferences for web or telephone (though the weight of evidence points towards some greater preference by women for telephone and men for internet). It appears that in relation to Traveline-txt, for many people the lack of familiarity with this offering makes it difficult to express an informed opinion. This service already exists whereas seeking views on future possibilities is even more challenging and it is suggested would require some more in-depth qualitative research.
10. In relation to Traveline-txt, levels of use appear (in relation to overall use of Traveline) to be appreciable. At the point of writing trend data has not been considered but it is assumed that a growth trend to date has been observed. It would

be helpful to learn more about the drivers behind such demand if any grasp on future projections is to be established. This topic becomes a major factor in the future planning of Traveline services when considered against the backdrop of the likely expansion in mobile internet access with 3G phones, whereby RTI data can be easily downloaded onto handsets, even with map based bus-tracker facilities.

11. Care should be taken in judging the value for money of provision of the Traveline service. It should certainly not be assumed that one enquiry to the service concerns the making of only one trip. Given people's natural tendency to habituate their behaviour, coupled with the notion of satisficing behaviour, it should be borne in mind that occasions of information seeking may be paving the way for establishment of new and sustained travel behaviours (though on occasion such new behaviours subsequent to information use may not involve public transport). As people change schools, jobs and residential locations there are natural junctures for making travel decisions for routine daily journeys that may be changed but will then endure for periods of perhaps years. In this context it once again becomes important to stress that more needs to be known about the scenarios in which people are making enquiries to Traveline and indeed choosing between the telephone service and the website.

In summary the points above suggest a need for Traveline to consider: (i) ways of ensuring that what it already does it better (especially in relation to the websites); (ii) further ways of 'making the connections' with people's natural processes of decisions to travel and planning on how to travel (e.g. search engines, travel destination sites, other information services); and (iii) selective pieces of research that are cost-effective in building a clearer understanding of the nature of existing (and in turn prospective) demand for use of Traveline - noting the distinctions between the three existing channels of telephone, internet and SMS whilst remaining aware of the forthcoming expansion in mobile internet access.

It is worthy of note that changes in communications media and public familiarity with those media have been rapidly taking place in at least the last five years and are likely to continue to do so. Public attitudes towards climate change, congestion and fuel/tax charges are also in a state of flux. Under these circumstances, market research results need circumspect interpretation and great care is needed in the design and conduct of surveys.

The points above offer insights and suggestions in relation to the two central research questions:

- how to attract people to use the Traveline service; and
- what are the likely future scales of enquiries (notably to the telephone call centres)?

It is recognised that the two questions are not (yet) answered directly. It is not felt that this is possible given the limitations and uncertainties of understanding that remain to be addressed. The points above formed the basis for the discussions at the workshop on 11 July 2008. The following final section of the report moves from summarising key points from that discussion to highlighting a number of research recommendations that have emerged.

5 Key workshop points and research recommendations

At the workshop that took place on 11 July, the preceding content of this report, notably the eleven points from the previous section, was discussed at some length. In broad terms the workshop attendees concurred with the nature of the points being raised. Accordingly, discussion moved in turn to the research needs for Traveline. In this section, some particular points of discussion at the workshop are summarised. The section then concludes with outline recommendations on potential pieces of further market research that could be of value to Traveline to pursue.

Points of discussion

Trend in call-centre enquiries - Workshop participants agreed that more information was needed to determine the reasons for the recent decline in the number of call centre enquiries overall. It is possible, for example, that this is a consequence of the improved availability of on-street timetables, printed information and the availability of improved operator websites and the growing competencies that people have to search for information online. It is also possible that there is a direct relationship between trends in bus patronage and the number of calls but this was contradicted by East Midlands data where increased bus patronage had not been matched with increasing calls. It was evident that care should be taken in reacting to the headline aggregate trend without due understanding of developments and influencing factors at a regional Traveline level.

Finding Traveline on the web - Google Analytics data for the Traveline website(s) use is unable to distinguish between successful and unsuccessful user sessions and this was understood. Accordingly trend data for telephone and web access to Traveline should be treated with care. Note was taken of the high proportion of visitors to the Traveline web portal that arrive via a referral from another website or by linking from search engine results. People who are seeking public transport information that Traveline can provide will be using particular keywords on search engines. It was recognised that it is crucial for Traveline to align with these keywords and appear on the first page of search results. It was suggested that Traveline is principally focused upon the keyword 'public transport' and yet the public may use the terms 'bus' or 'train' to find information services via search engines. Meanwhile, it is important to check that other websites that represent natural referral sites for Traveline are suitably highlighting the Traveline link such that it is intuitive for prospective users to follow. Workshop participants agreed that there were many questions unanswered about the efficacy and design of the website and its positioning and accessibility within the travel information marketplace.

Establishing Traveline's USP - A discussion revolved around the need to establish a common format for the regional websites but this was subsumed by considerations of exactly what the website should provide in the context of competing/overlapping services now available in the travel information marketplace. It was clear that strategic proposals for marketing policy were dependent upon the results of market research and that the call centre and website services needed to be considered holistically. Discussion took place concerning the unique selling point(s) of Traveline. While the provision of an SMS mobile text service and bus-only journey planning (a potentially pertinent consideration in the wake of concessionary fares) are notable offerings, the principal Traveline USP appeared to be the telephone enquiry service. Not only does this uniquely provide a national multi-modal public transport journey planning telephone service; it offers call centre operatives based in the UK (as distinct from negative perceptions held by the public in general about call centre operations outsourced to cheaper labour in other countries).

Demand for Traveline arises from information need - The proposition posed by CTS that increased awareness of Traveline would not, in itself, necessarily result in greater attractiveness of the services, was accepted. Customers are attracted firstly by a predetermined desire to travel or consider travelling by public transport. Traveline can only operate in reaction to this source of demand. Nevertheless, the visibility of Traveline and what it does must be sufficiently salient that when people are seeking information that Traveline can provide they are easily able to locate and then use the Traveline service(s). In this context there may be value in ongoing promotional activity that ensures people are primed to recognise Traveline such that they can 'connect' with it as and when their need for public transport information (later) arises.

Understanding the customer - A general consensus emerged that investment in advertising and service development to achieve sufficient salience and usability could not be effectively applied without better research into the needs and desires of customers. The current satisfaction questionnaire surveys were considered by one region to be a 'nice to have' option, with a greater reliability being placed on customers' use of feedback forms. In Scotland the Scottish Household Survey has provided an opportunity to obtain good quality data but this has been constrained by the limited number of Traveline questions, as has also been the case for the Omnibus survey data collected in Wales. Questionnaire surveys have a tendency to contain the vocabulary of the industry rather than that of the customer. Such examples pointed towards the more general observation that certain (quantitative) methods have inherent limitations and cannot be expected to address fully the needs of market research. The argument was put forward that well designed and conducted qualitative research would provide valuable depth insights into customer needs, views and behaviours. It was stressed that it should not be necessarily assumed that any research was better than none in the sense that research findings are often heavily governed by research design.

The case for mobile internet access to Traveline - Some specific discussion took place concerning the merits of Traveline pursuing opportunities to become available via mobile internet. While it was recognised that an immediate opportunity presented itself in relation to Orange, there was general agreement that at present it remains unclear whether or not this would be meeting a (currently unmet) customer need. Care should be taken in drawing comparisons with developments of mobile internet with other services or in other sectors. To ensure that the 'solution' of mobile internet access would indeed be addressing a 'problem' faced by (prospective) users, there is a need for (qualitative) market research to better understand customer needs.

Insights from TfL and NRES - It was suggested at the workshop that some relevant insights may be available concerning TfL and NRES in terms of travel information use. Tony Ferguson agreed to secure some information on this. This is summarised as follows:

- TfL - assumed to reflect TfL overall (which would include Oyster enquiries alongside London Underground and Surface Transport), from fiscal 2007 to 2008 there has been a 5.3% increase in travel information enquiries (3.02 to 3.19M).
- Set against the above, a comparison of Traveline telephone enquiries to London shows a decrease of 5% between the first six periods of 2007 and the corresponding periods in 2008.
- Regarding NRES:
 - Total contacts for 07/08 were 131 million - up by 11% on 06/07. Self serve was up by 21%; telephone enquiries down 20%.
 - The Online journey planer remains the biggest channel representing 64% of all contacts.

- Train Tracker volumes increased by 3.4%, finishing the year (07/08) on 4.5 million calls, of which 53% were routed through the 0845 number. Train Tracker now does fares and ticket availability.
- The latest channel enhancements are: real time journey planning on website; alerting on website; and Train Tracker fare.

Recommendations for further research

Based upon and arising from the workshop discussions surrounding the eleven key points in the preceding section of the report, a number of suggestions for future research are now put forward. It was recognised at the workshop that there may be a case for shared responsibility for funding a future market research programme. In pursuing the broad question of ‘What are the barriers to public transport information use in the UK?’, or ‘How is the current information marketplace meeting the needs of the travelling public?’, there is a national policy interest. Accordingly it may be the case that the Department for Transport, the Welsh Assembly and the Scottish Government have a part to play in (jointly) pursuing research questions in which Traveline also has an interest.

The pieces of research suggested below are based upon the insights gained from the desk study and workshop. They are not arranged in any particular order of priority, nor have costings been estimated. It is assumed that the Traveline Board in conjunction with the Marketing Group would need to discuss the implications and next steps. It may be appropriate for a specification for a market research programme to be drawn up and approximately costed.

1. **Squeezing the juice - learning from call log data** - Traveline call centre activity has, over a period of years, been generating call log data. However, such data have not been analysed - certainly in any in-depth manner. The desk study review has highlighted the difficulties in understanding response biases in terms of follow-up questionnaire / interview work undertaken to date. In contrast such sample problems do not exist for call log data. A combined approach of data analysis and, possibly, data visualisation (in a geographic sense) could yield new insights into the nature of call enquiries and indeed into how such enquiries are addressed. Following on from this, it could then be appropriate for a national reporting template to be prepared such that on a periodic basis in future call log data can be processed into reports.
2. **What do (prospective) customers want? - identifying user needs and desires** - It is evident that little is known in market research terms about what individuals, *who have a wish to consider using public transport and who have a travel information need*, really need from a travel information service such as Traveline. Some people (as appears to be the case) are wishing to obtain a relevant timetable PDF/printout; others may want to know if a public transport journey is viable within their time constraints; others may want sufficient guidance to make a journey without getting lost along the way. Research could be undertaken to establish a list of such ‘user needs scenarios’ (UNS). This would involve exploratory research and be likely to be qualitative in nature. A mixed method approach may be advisable such as a series of focus groups coupled with observation and intercept work with people travelling on public transport. By intercepting individuals at suitably selected locations it is likely to be possible to examine the information needs and forms of information used for the journey being undertaken. This could focus only upon their pre-trip information needs or could address the full ‘journey lifecycle’ from contemplating the journey through to its completion. The focus groups could be used to explore public views on how best different UNS are being or could be addressed by the travel information marketplace. Such research would provide a deeper understanding of the different sorts of UNS. This research would address both an understanding of how Traveline services and functions currently align with user needs as well as providing insights into

appropriate future service development opportunities in light of a wider view of travel information need. A separate, or follow-on, piece of quantitative research would be required to establish some means of prioritisation or sizing of the identified UNS.

3. **Prioritising and sizing the user needs scenarios** - A piece of quantitative research would be appropriate for establishing a better sense of the relative prevalence of different user needs scenarios (UNS). This could be addressed in part in conjunction with research suggestion 1 above - i.e. in terms of secondary analysis. It seems likely however that use will also need to be made of Traveline telephone enquiries: this might be in two ways - (i) through listening to a sample of recorded enquiries; and (ii) to sample individuals who have called Traveline and are thus pursuing a travel information need. To exercise some control of sample bias it is suggested that individuals are incentivised to participate in what would be a longer than previously undertaken Traveline telephone interview. To better understand response bias, call log data should be kept for all callers who are asked to participate in the survey, including those who decline. While it is recognised that using the call centres as a means of accessing participants would not adequately represent the wider population of prospective Traveline users (covering call centres, website and Traveline-txt) it would nevertheless build a much clearer picture of information need. The envisaged interviews would not solely focus upon the specific enquiry during which the participant was recruited for the interview. To assess the relative prevalence of different UNS a third methodological approach could employ intercept surveys of the sort referred to in (2) above. However, this would present challenges in terms of securing a representative sample of travellers with public transport information need.
4. **Useful, usable and used - usability testing of the Traveline website(s)** - Faced with the scenario of needing to obtain certain public transport information in order to consider undertaking a journey, there is a need to understand in detail how individuals pursue such a need - from deciding where they might look for information, through how they would attempt to locate a given information service, what language and terminology they would use, to, specifically, how they would use the Traveline website(s). This research would address two concerns: (i) how easily can people who would benefit from using it, locate Traveline; and (ii) once located, how useful and usable do people find Traveline to be? It would involve a usability testing exercise in which a sample of individuals would be asked to undertake a small number of specific tasks involving Traveline and to 'think aloud' as they do so - highlighting what they are trying to do, what they find appealing, frustrating or confusing about locating and using the website(s) and their attitudes towards this. For each individual a debrief interview would follow the usability testing to probe more widely their experience, views and suggestions in relation to pinpointing design improvement ideas. Subject to the level of resourcing available, it would be instructive to revisit some or all of these individuals in further work in which they are presented with (paper-based) mock-ups of alternative, improved versions of the web service to assess whether such mock-ups reflect their earlier feedback and to help identify a preferred option. It should be noted that such research would need to consider how to address the current variety of Traveline interfaces and whether or not a single interface for all regions was the end goal. Sensibly, an approach would look across different regions to identify instances of effective and not so effective design with a view to pooling understanding, sharing good practice insights and identifying common ways forward.

There may be merit in additional pieces of research associated, for example, with understanding first time users and investigating future demand for mobile internet facilities. However, to an extent it is felt that the recommendations above could

encompass this. It is suggested that the research above is considered in terms of being a potential next phase of market research with an assumption that a subsequent phase may then emerge as appropriate (with or without shared funding from other sources).

Appendix 1 - Presentation slides for workshop

Traveline Market Research Scoping Study
Workshop – 11 July 2008, UWE, Bristol



Findings from the desk study review

Professor Glenn Lyons
Centre for Transport & Society, UWE, Bristol



University of the
West of England
BRISTOL



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Overview

- The brief
- The research team
- The evidence
- The findings
- The implications



traveline
public transport info



The Brief

- To prepare a short report which draws together a synthesis of insights from the existing traveline market research coupled with a synthesis of expert understanding of the associated wider research field
- To convene a workshop to discuss the desk study findings and to identify:
 - important factors, considerations and knowledge gaps ; and
 - options for proceeding beyond the scoping study.



The Research Team



Professor Glenn Lyons – expert advisor to Transport Direct (2002-07): Senior User on Portal Project Board; Chairman of Research Steering Group



Dr Erel Avineri – Reader in travel behaviour: expert in travel choice making drawing upon theories and understandings from the behavioural sciences



Dr Sendy Farag – Research Fellow and principal researcher, applying social psychology, on the project 'Traveller information services – assessing barriers to their use'



Dr Graham Parkhurst – Reader in sustainable mobility: expert in the areas of park and ride, demand responsive transport and, latterly, concessionary fares



Peter Wiltshire – Visiting Research Fellow and Secretary of the Ten Percent Club: extensive career in transport planning and traffic engineering and latterly a key focus upon creative marketing and advertising

The Evidence



1. Scottish Household Survey results for Traveline Scotland, 2005
2. Traveline Scotland Customer Research Project, Jan – March 2005
3. Traveline Scotland contribution to modal shift, 2006
4. PTICymru Annual Market Research Report, 2007
5. Traveline East Anglia call centre survey results for Suffolk, 2008
6. Traveline South East call centre customer satisfaction results, December 2007
7. Traveline web questionnaires for Wales, East Midlands (and East Anglia), 2006/07
8. Traveline performance results for period 17th May to 13th June 2008
9. Kizoom monthly report, March 2008
10. Google Analytics, 1st July 2007 to 30th June 2008.



Lyons, G., Avineri, E., Farag, S. and Harman, R. (2007). *Strategic Review of Travel Information Research*. The Department for Transport, London.
<http://www.dft.gov.uk/transportdirect/research/overviewandbackground>

Lyons, G. and Farag, S. *Barriers to travel information use*. 2006-08, Centre for Transport & Society, UWE, Bristol.
<http://www.transport.uwe.ac.uk/research/projects/futures-barriers.asp>

The Findings (1 of 12)

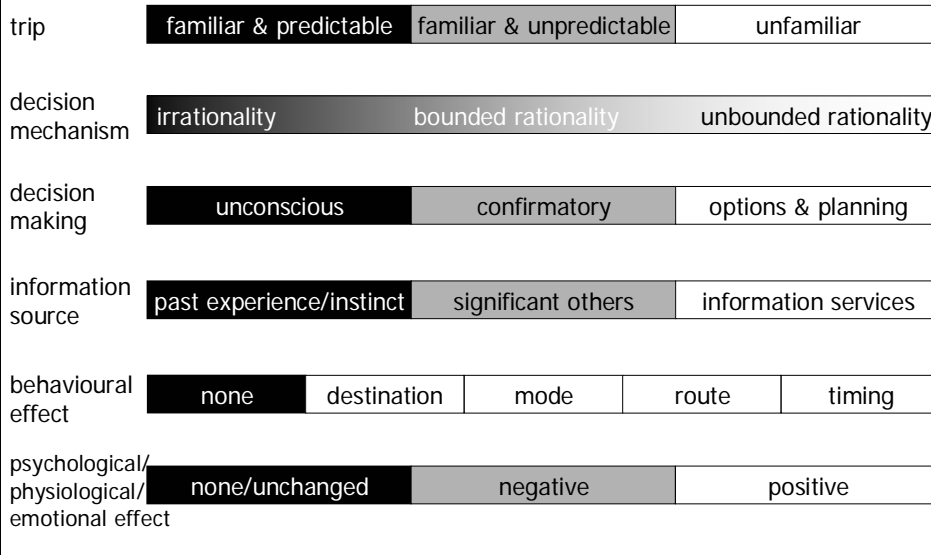
Overview comments

- We recognise that understanding demand for and consequences of travel information use is difficult to research – context is very important; difficult to generalise
- There are a number of important issues and caveats associated with methodologies applied and their findings – these should be accounted for



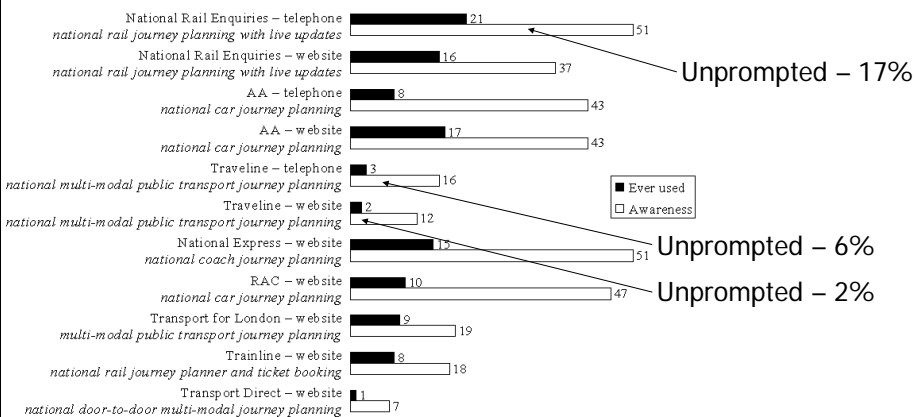
The Findings (2 of 12)

The wider field – making travel decisions



The Findings (3 of 12)

The wider field – awareness of information services



Awareness and use of travel information services in the UK (% of respondents). Base = 2095.



The Findings (4 of 12)

The wider field

- Just less than half of the British population travels less than once a year by train or travels less than once a year by local bus
- Demand for and importance of information into the future will be dictated significantly by:
 - the share of overall travel between familiar and unfamiliar journeys;
 - the extent of stability and predictability of transport system performance; and
 - the extent of change in the relative 'costs' of alternative travel options.



The Findings (5 of 12)

The wider field

- Demand for public transport use generates demand for public transport *information* use moreso than the other way around
 - motivating people to consider public transport is key to increasing demand for information
 - Information must not then be an obstacle to public transport use
- People's information use appears to be habitual – they have default and backup information sources
- Older participants in our qualitative research have indicated a preference for accessing public transport information through speaking to someone



The Findings (6 of 12)

The Traveline evidence

Scottish Household Survey results for Traveline Scotland, 2005

- The act of using Traveline is not a regular behaviour
- No dominant public focus emerges for either sources of advertising or future channels of delivery
- Some evidence of influencing travel behaviour

Traveline Scotland Customer Research Project, January – March 2005

- Some greater preference for access to Traveline exists for women compared to men who meanwhile have some greater preference for internet access
- High levels of respondents (but what about all users?) appear pleased with the telephone service (but beware first time users)



The Findings (7 of 12)

The Traveline evidence

Traveline Scotland contribution to modal shift, 2006

- Enquiries may tend more towards the journeys that are not 'everyday'
- It is not clear how access to car relates with likelihood of using Traveline
- The telephone service is considered more usable than the website service
- What do we know about the variability in frequency of Traveline use by given individuals? (see later)
- Can someone who wants to find information for a bus journey in their area easily locate Traveline?



The Findings (8 of 12)

The Traveline evidence

PTICymru Annual Market Research Report, March 2007

- More people believe they would know a means of obtaining public transport information on the telephone than on the web
- Nearly half of people claiming to make some use of public transport had not used any of the listed information services in the last 6 months

Traveline East Anglia call centre survey results for Suffolk, 2008

- Just over half of callers to Traveline would like to get fares information – it is not known, however, whether such information is seen by callers as nice to have, important or essential
- Frequencies of use seem very high - 1 in 4 survey respondents use Traveline at least once a week



The Findings (9 of 12)

The Traveline evidence

Traveline South East call centre customer satisfaction results, Dec 2007

- Notwithstanding possible optimism bias, very high proportions of survey respondents are sufficiently satisfied with the service to claim they will use it again and recommend use to others
- The website is serving some purpose in routeing people to the telephone service

Traveline web questionnaires for Wales and East Midlands, 2006/07

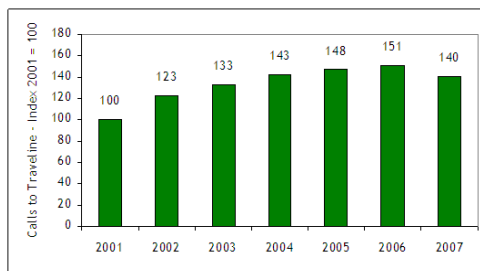
- It is not clear how first time website users are 'behaving' and thus what influences are exerted on questionnaire responses
- Interest in Traveline-txt may be offset by poor experience of use
- Half of survey respondents have not indicated they would use the site again and substantial minorities are unhappy with features of the website



The Findings (10 of 12)

The Traveline evidence

Traveline performance results for period 17th May to 13th June 2008



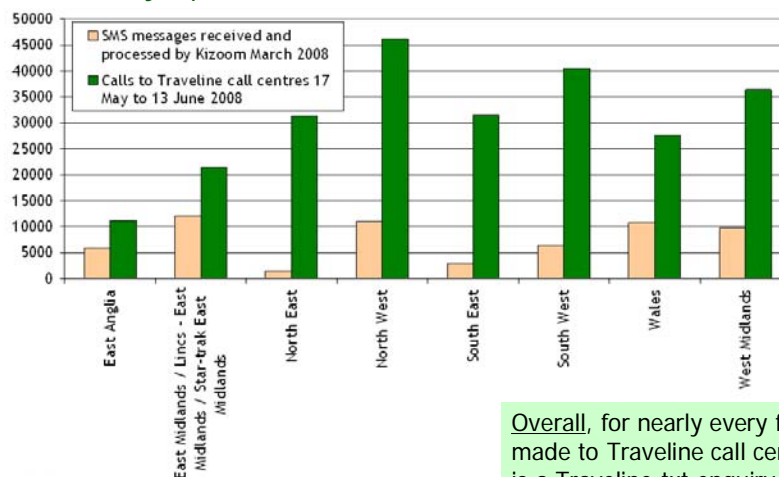
- Unknown externalities may be at work in explaining the downturn in demand
- Collating such trend data across channels and for other services would be helpful



The Findings (11 of 12)

The Traveline evidence

Kizoom monthly report, March 2008



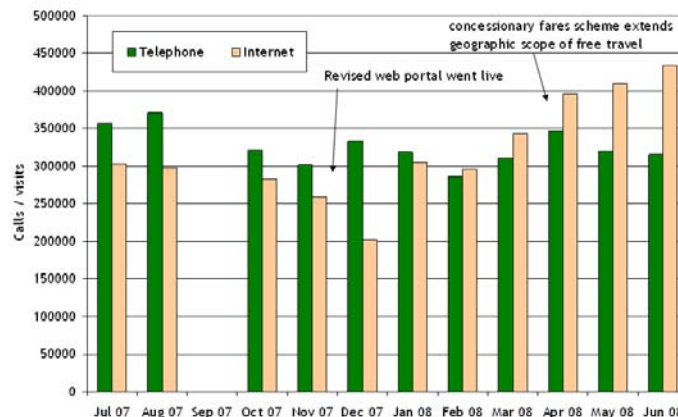
Overall, for nearly every four calls made to Traveline call centres, there is a Traveline-txt enquiry

The Findings (12 of 12)

The Traveline evidence

Google Analytics, 2007-2008

Extent of 'successful' web sessions unknown



78% of visits to traveline.org.uk come via a referral site or a search engine

The Implications (1 of 3)

1. Ensure that when people need ~~public transport~~ bus information they can easily find traveline (not the same as advertising the Traveline brand). The website must be useful, usable and used – this is what creates repeat users and word of mouth referrals.
2. Why are people using Traveline and in what contexts? This is a fundamental question to address in order to understand customers and their needs. 'Segmenting' the market would then allow a more informed and targeted approach to service development and offerings.
3. How do first time users differ from returning users? What makes the website 'sticky'?
4. When is Traveline used in relation to the associated journey?

The Implications (2 of 3)

5. Is there an understanding of why Traveline online is used in preference to other websites? What is Traveline's USP in a growing travel information marketplace?
6. Why does Traveline on the web not have a common interface design – does this reflect a customer-focused approach to service development?
7. The telephone service appears to be well received – recent declining usage *may* not reflect a longer-term trend or reflect a declining value of service provision.
8. Is Traveline used in combination with or in isolation to other information services?
9. Evidence to date is far from conclusive on public desire/need for future service offerings – in-depth qualitative research is needed.



The Implications (3 of 3)

10. *Why* are people using Traveline-txt and in what contexts? This may provide important clues to the appropriateness of future service offerings
11. It should not be assumed that one enquiry to Traveline only affects one journey when judging the business case



Concluding remarks

- Consider doing what you already do even better
- Consider improving how to 'make the connections' with people when they need what Traveline can (already) offer
- Undertake selective new research in a rigorous and cost-effective manner