



# REMAINING CHALLENGES FOR EU-WIDE INTEGRATED TICKETING AND PAYMENT SYSTEMS

## *Annex II*

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# **REMAINING CHALLENGES FOR EU-WIDE INTEGRATED TICKETING AND PAYMENT SYSTEMS**

## ***Annex II***

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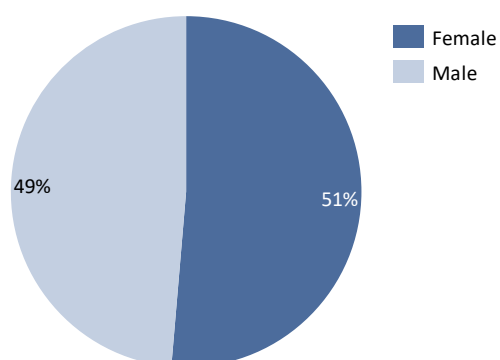
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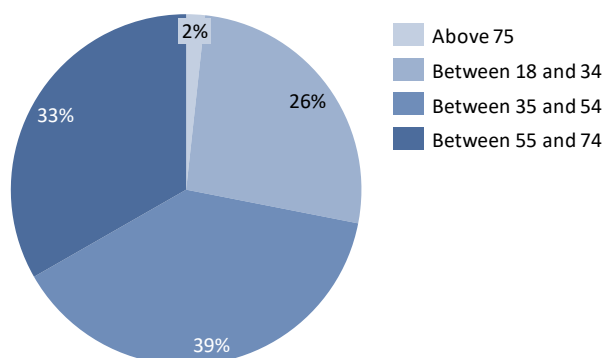
## Assessing passengers' experience

As displayed in Figure 1, the survey sample was quite balanced between the two genders. In terms of age, most respondents were aged between 35 and 54 (39% of all respondents). The distribution among the selected countries is homogeneous, with a mean of 90 respondents per country.

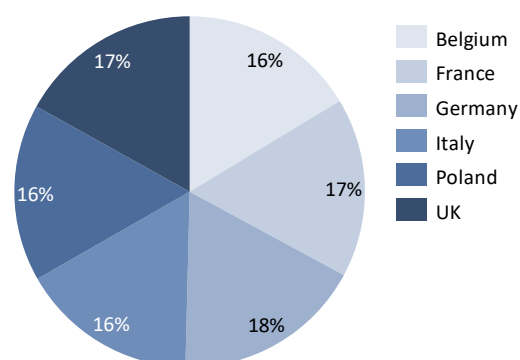
**Figure 1 Survey respondents' profile**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Gender.



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Age category.



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Please indicate your country of residence.

The following sections provide the key findings from the online consumer panel.

Figure 2 summarises the means of transport that were used by the respondents in the last 12 months across the different countries.

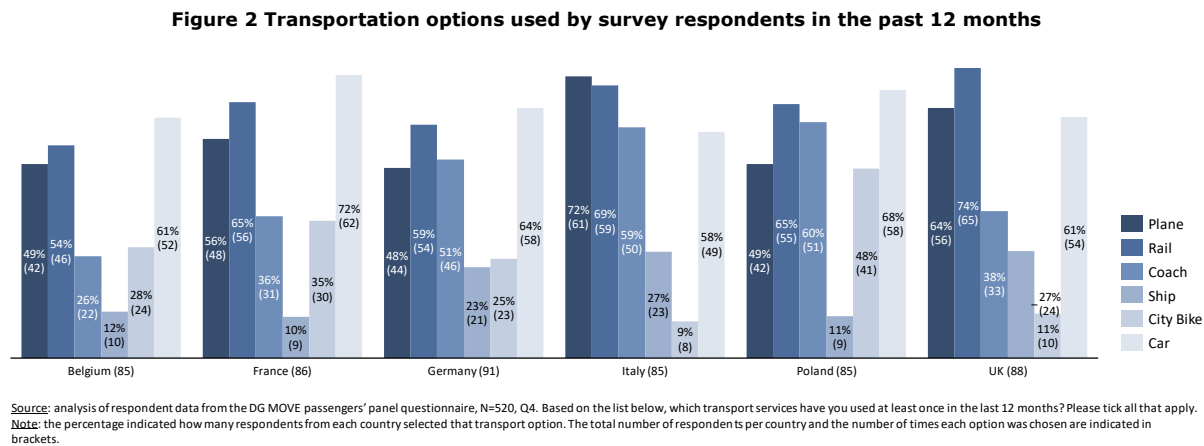


Figure 3 below shows the frequency with which respondents' journeys involved the combination of different transport services.

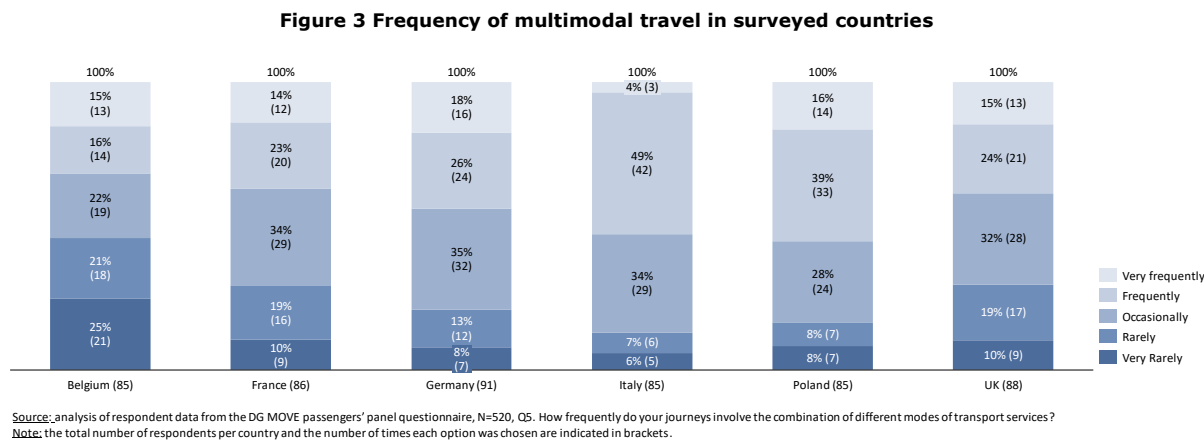
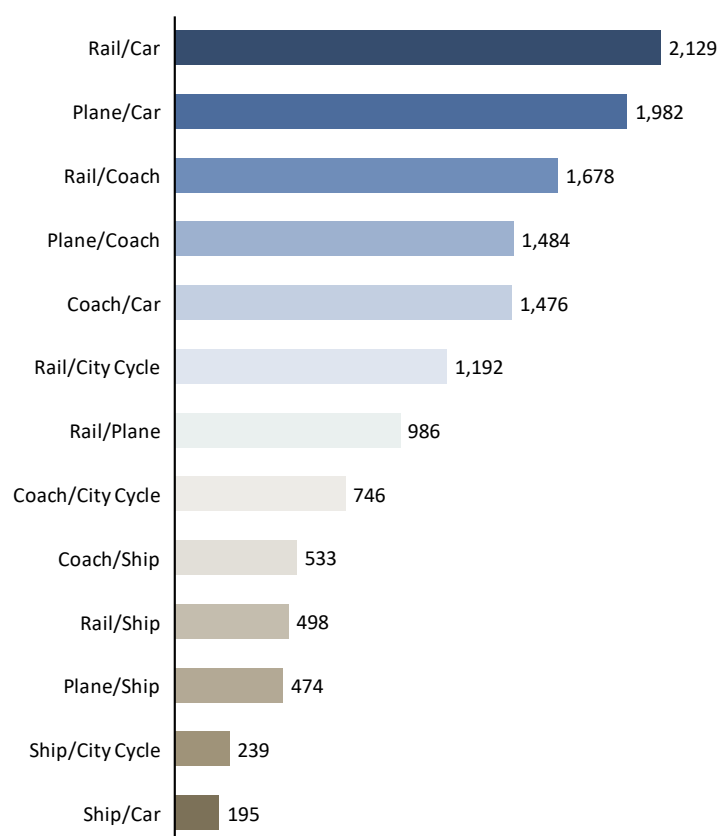


Figure 4 shows which combinations of modes of transport respondents have used the most during their journeys.

**Figure 4 Respondents' rankings of their most used combinations of modes of transport**

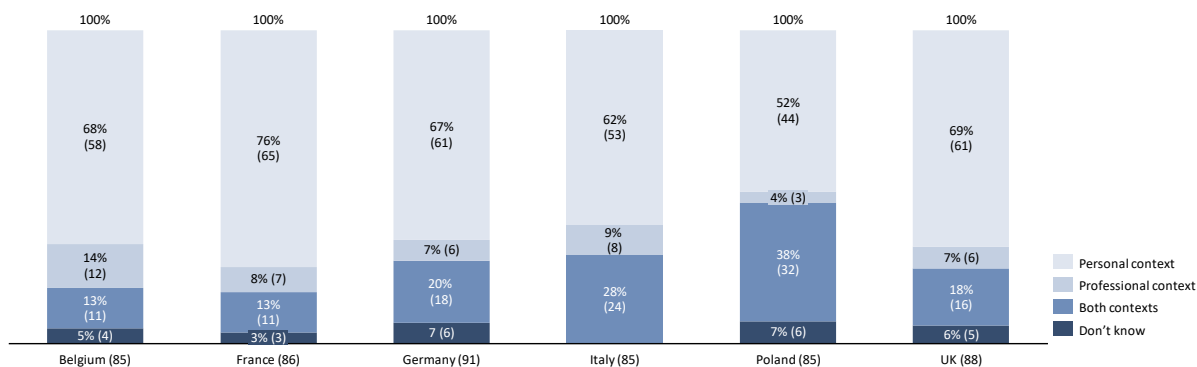


**Source:** analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Q6. Please rank which combinations of modes of transport you have used the most during your journeys in the past? Please rank up to 5 transport combinations with the first option being used the most and the last option being used the least.

**Note:** to calculate the rankings, weights were assigned to each ranking position (i.e. 1<sup>st</sup> rank was awarded 13 points for each time it was selected, 2<sup>nd</sup> rank 12, 3<sup>rd</sup> 11, etc.) and absolute score was calculated for each option, based on how many times the transport combination was ranked as 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, etc.

Figure 5 shows in which context the respondents have predominantly combined the use of different modes of transport.

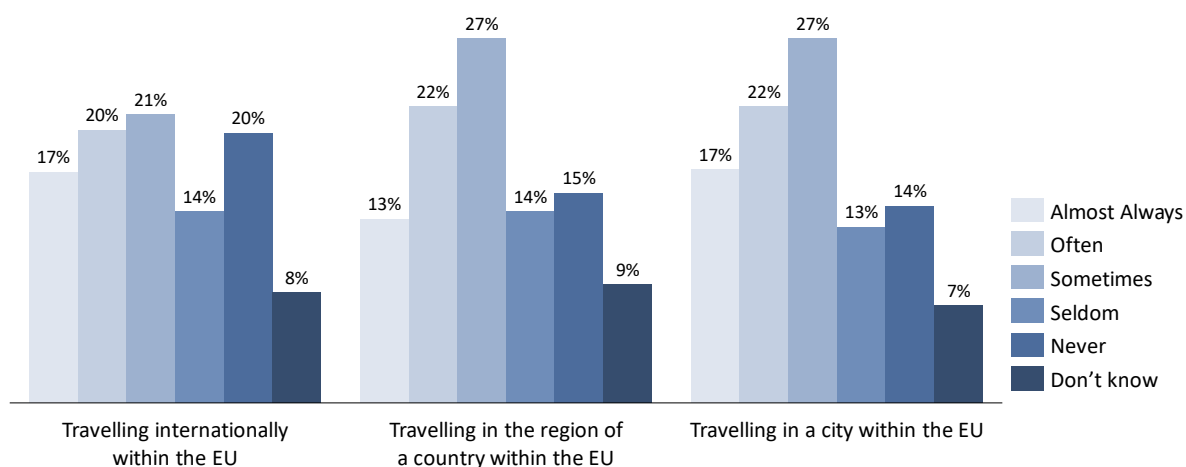
**Figure 5 Context in which survey respondents' travel**



**Source:** analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Q7. In which context have you predominantly used the combination of modes of transport services?  
**Note:** the total number of respondents per country and the number of times each option was chosen are indicated in brackets.

Figure 6 illustrates that, for each journey type, the respondents were only sometimes able to buy such a ticket.

**Figure 6 Possibility to purchase a single-integrated ticket**

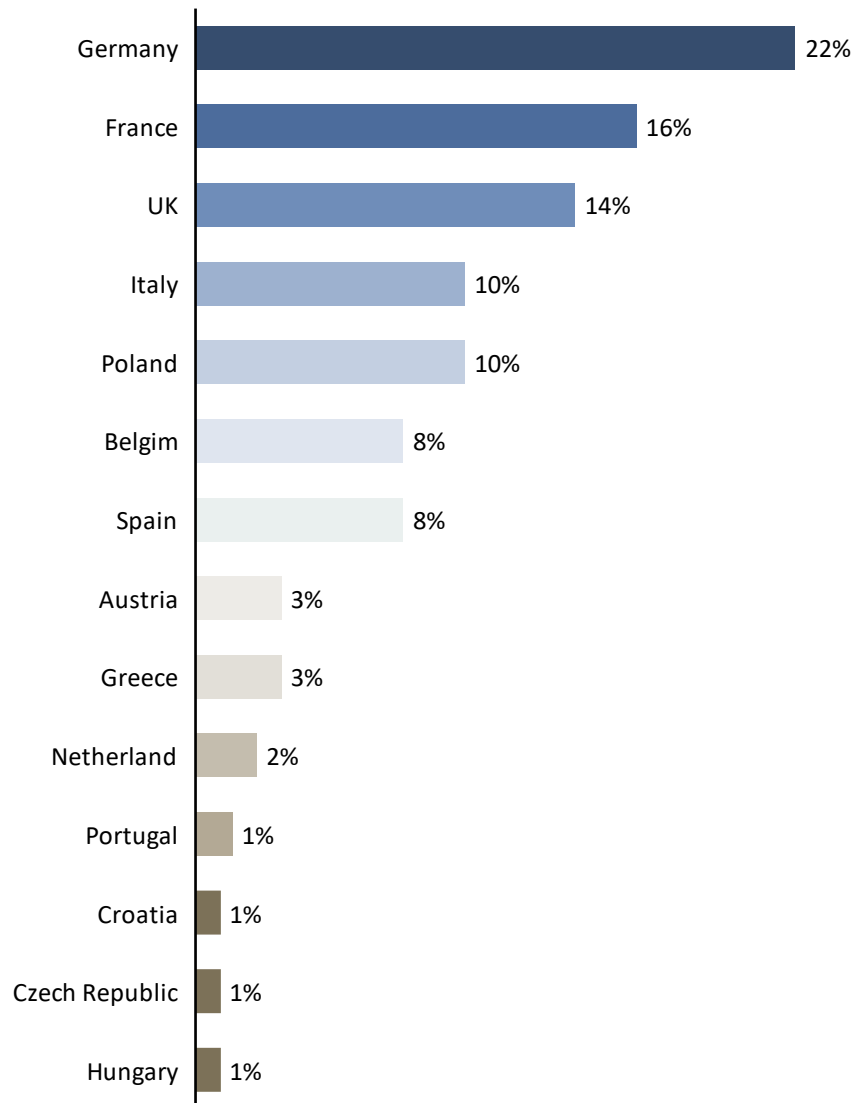


Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Q8. For each of the journey types, please specify whether you are normally able to purchase a single integrated ticket covering your entire journey. Integrated ticketing allows a person to make a journey that involves transfers within or between different transport modes with a single ticket that is valid for the complete journey, modes being buses, trains, subways, ferries, etc.

Secondly, respondents were also asked in which country they were able to purchase a single integrated ticket.



**Figure 7 Countries where respondents were able to purchase a single integrated ticket**

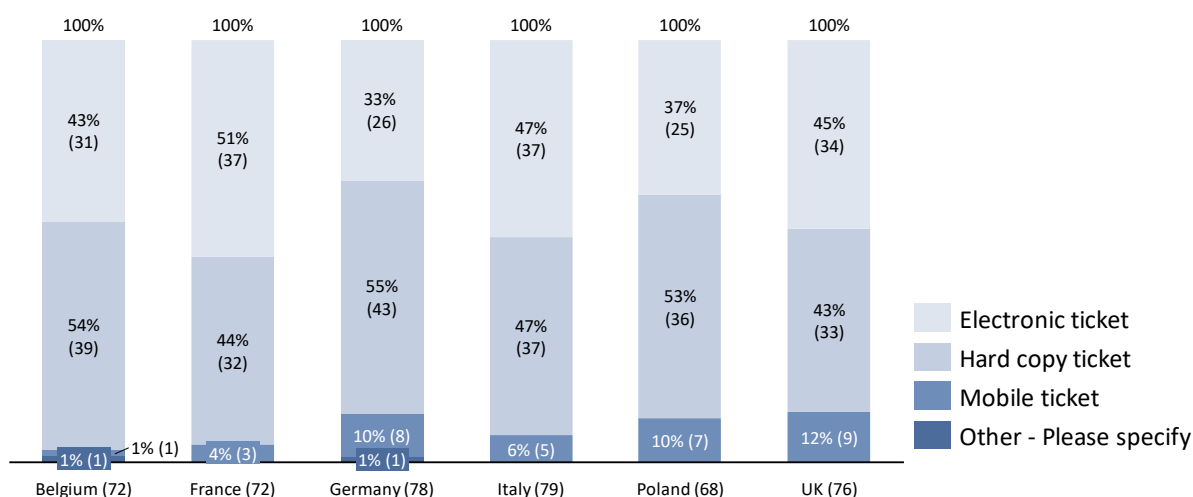


Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=226, Q9. In which country were you able to purchase a single integrated ticket?

Note: Only the respondents that selected 'Very Frequently' and 'Frequently' in Q8 were asked this question.

The respondents, which were able to purchase a single integrated ticket when travelling were also asked in which form the single integrated ticket was released.

**Figure 8 Format in which the single-integrated ticket was resealed**

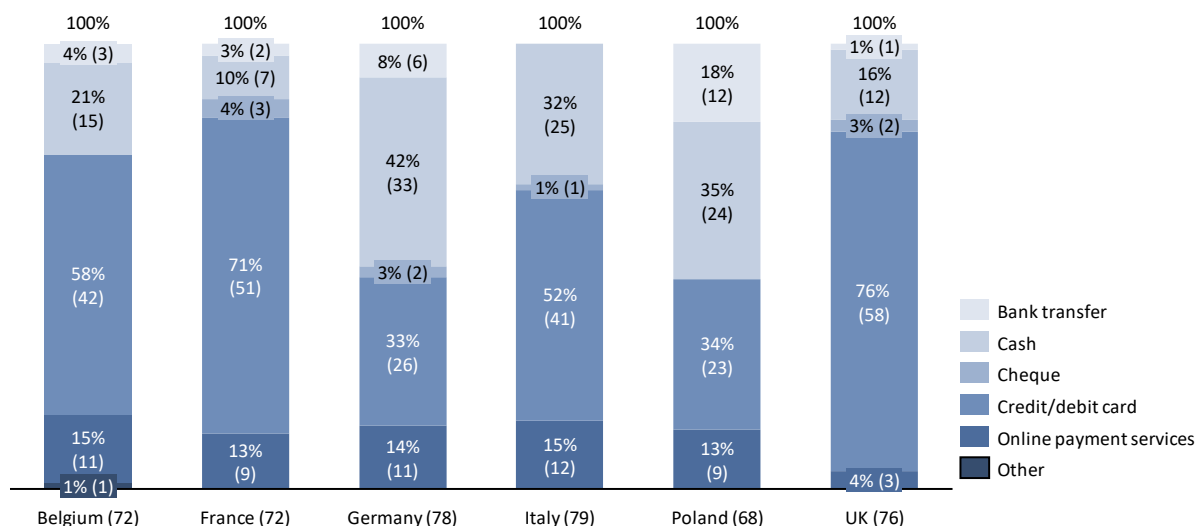


**Source:** analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=445, Q10. What was the format in which the single ticket was released?

**Notes:** only the respondents that selected answer option other than 'Never' in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

As shown in Figure 9, most of the respondents paid for their tickets using a credit or debit card (58% in Belgium, 71% in France, 52% in Italy and 76% in Poland) or cash (42% in Germany and 35% in Poland).

**Figure 9 Means of payment for single integrated ticket**

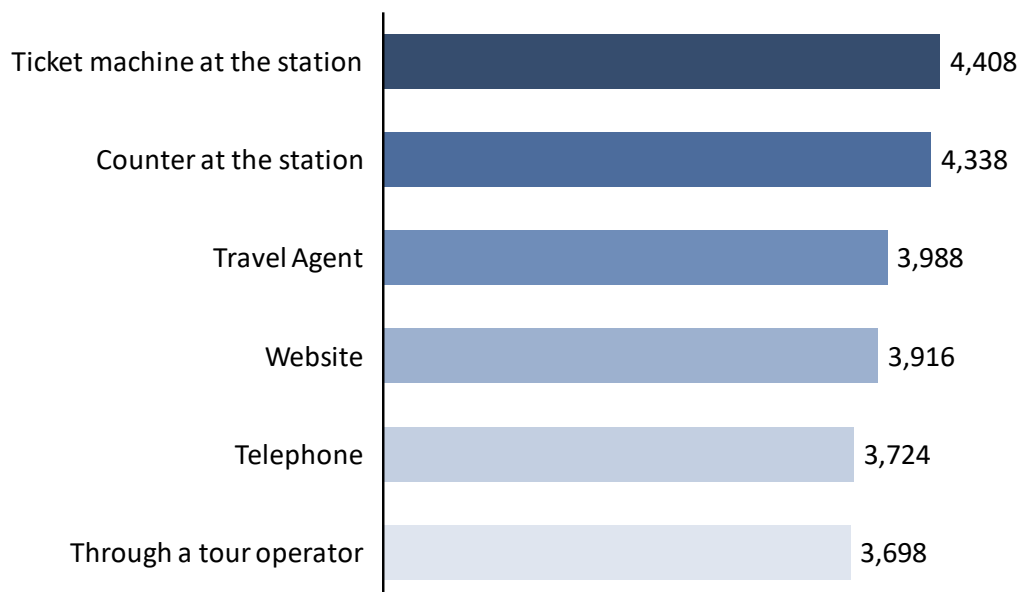


**Source:** analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=445, Q11. How did you pay for the single ticket?

**Notes:** only the respondents that selected answer option other than 'Never' in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

Respondents were also asked to rank how they normally book their tickets when travelling. Figure 10 summarises the ranking results. It is evident that survey responders most often purchase their tickets from a ticket machine or a counter at the station.

**Figure 10 The main ways of purchasing traveling tickets**

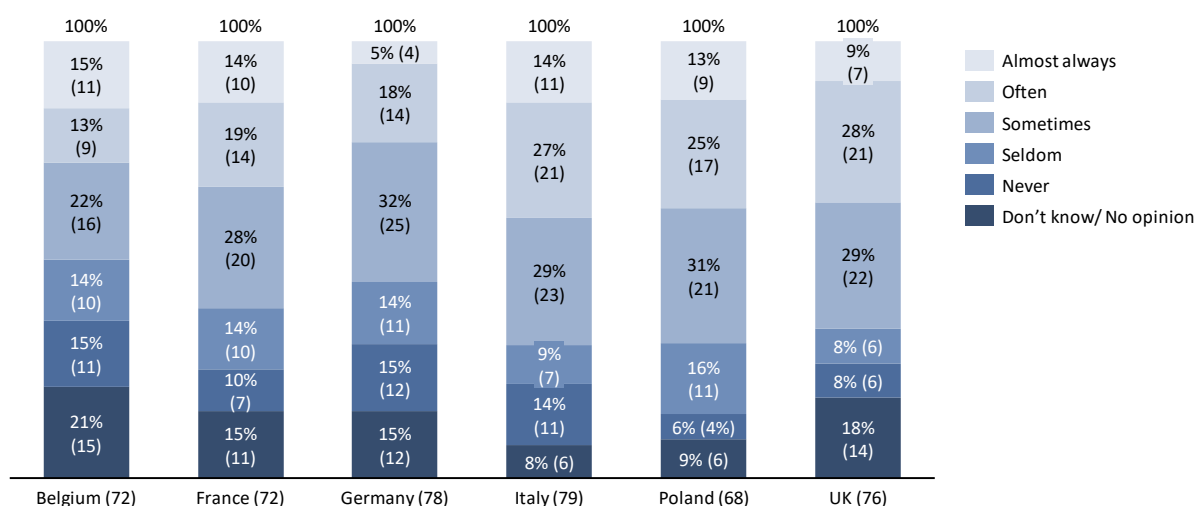


**Source:** analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Q15. When travelling, how do you normally book your travel tickets? Please rank the options.

**Note:** to calculate the rankings, weights were assigned to each ranking position (i.e. 1<sup>st</sup> rank was awarded 13 points for each time it was selected, 2<sup>nd</sup> rank 12, 3<sup>rd</sup> 11, etc.) and absolute score was calculated for each option, based on how many times the transport combination was ranked as 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, etc.

In order to understand if the single integrated ticket, when available, is proposed to the travellers during the moment of ticket purchase, respondents were asked if they were suggested this option when purchasing their tickets. As can be seen in Figure 11, although the situation changes from country to country, overall respondents were suggested this option either sometimes (28% of the cases) or often (22% of the cases).

**Figure 11 Frequency of passengers being suggested the purchase of a single integrated ticket**

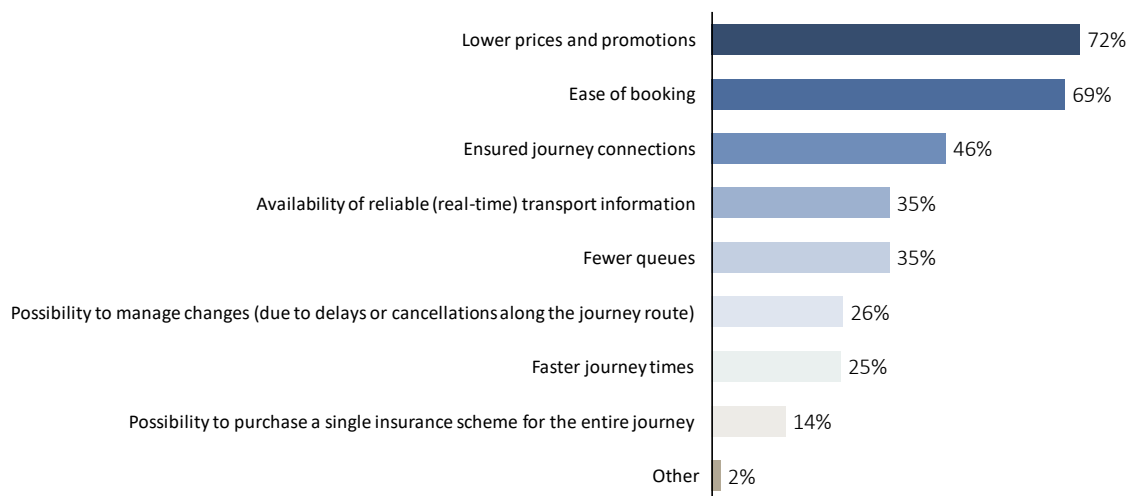


**Source:** analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=445, Q12. During the purchase of the ticket for your multi-modal journey, were you suggested the single integrated ticket option?

**Notes:** only the respondents that selected answer option other than 'Never' in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

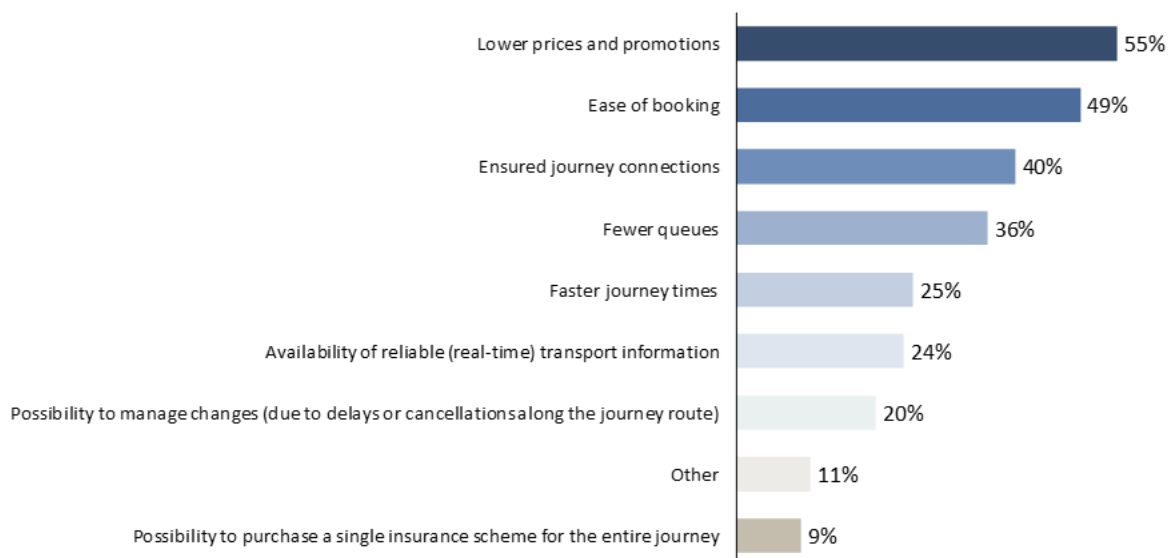
As appears from Figure 12, the top three factors that were perceived as the main benefits of the single integrated ticket are (i) lower prices and promotions, (ii) ease of booking and (iii) ensured journey connections.

**Figure 12 Benefits of purchasing a single integrated ticket as seen by those who purchased it before**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=445, Q13. Based on your experience, what were the benefits of using a single integrated ticket for your journey? Please select the top three.

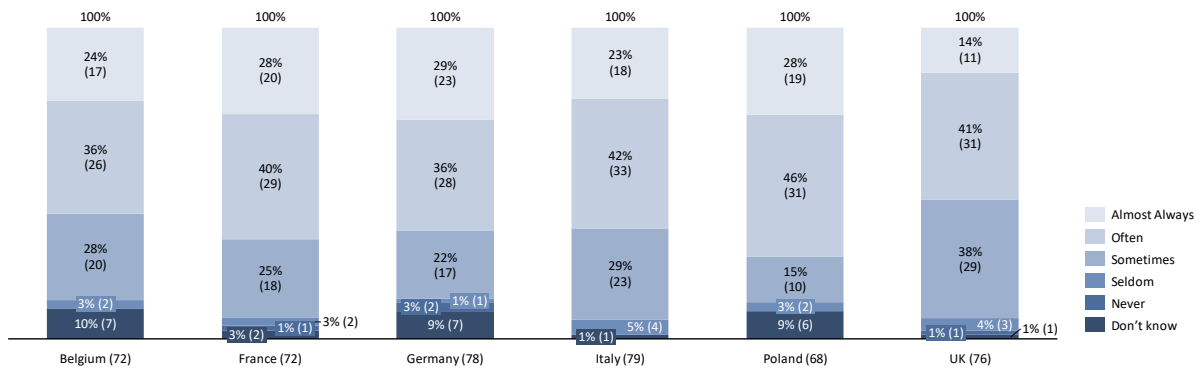
**Figure 13 Perceived benefits of purchasing a single integrated ticket by those who never managed to buy one**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=75, Q14. In your opinion, what would be the main benefits of using a single integrated ticket for your multi-modal journey? Please select all that apply.

As Figure 14 shows, most people in the different countries believe they are often provided with reliable and complete information about their journey.

**Figure 14 Integrated ticket purchasers' confidence in the reliability of information they are provided with**

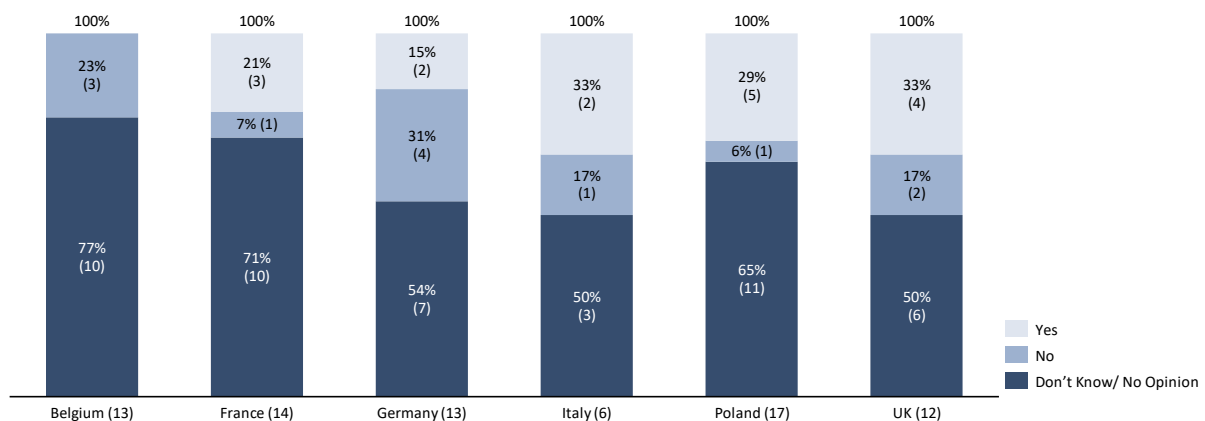


Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=445, Q16. When purchasing a single integrated ticket, to what extent are you confident that you are provided with reliable and complete information about the multi-modal travel journey?  
 Notes: only the respondents that selected answer option other than 'Never' in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

Also, people who have not yet used this kind of ticket think that they would be provided with reliable and clear information, should they obtain such a ticket. However, as seen in

Figure 15 it is important to note that majority of people (62%) had no opinion on this question.

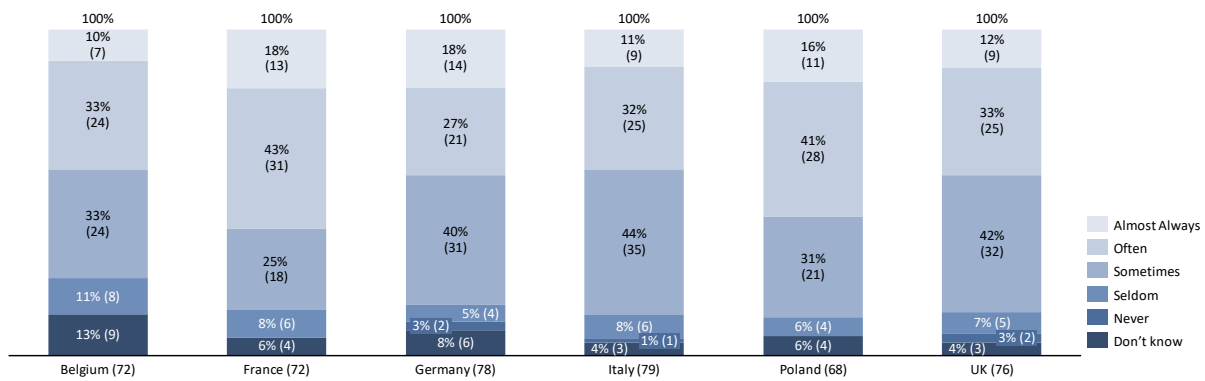
**Figure 15 Belief in receiving complete and reliable information when purchasing a single-integrated ticket as perceived by those who never purchase one**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=75, Q17. If you could always obtain a single integrated journey ticket, would you feel confident about being provided with reliable and complete information about the multi-modal travel journey?  
 Notes: only the respondents that selected answer option 'Never' in all three cases in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

In order to gather even more information about the level of confidence of the users of the single integrated ticket, respondents were also asked about the extent to which they think that they could be provided with a broader choice of transport services (e.g. alternative combinations) when planning their journeys. This depends on the country of residence, overall. Furthermore, in this case respondents believe the above is sometimes (36.1% of respondents) or often (34.6% respondents) true.

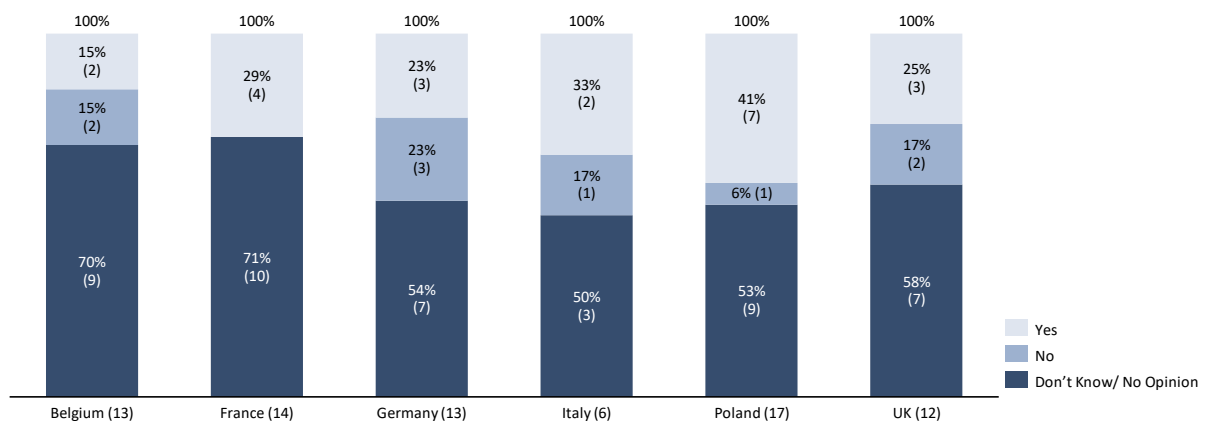
**Figure 16 Integrated ticket purchasers' belief they could be provided with more transportation options**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=445, Q18. When purchasing an integrated travel ticket, to what extent do you think that you could be provided with a broader choice of transport services (e.g. alternative combinations) when planning your trips?  
 Notes: only the respondents that selected answer option other than 'Never' in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

As before, this same question was asked to people who never used this ticket, and they do believe that they could be provided with a broader choice of transport means (28%), even though the majority of them did not express any opinion on that (60%). Results, broken down per country, are shown in Figure 17.

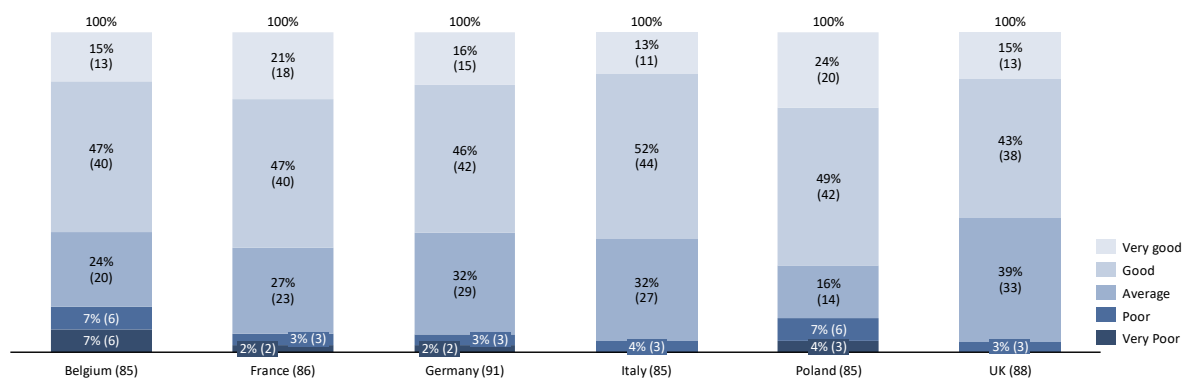
**Figure 17 Belief in possibly being provided with more transport options than currently perceived by those who never purchase a single integrated ticket**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=75, Q19. If you could always obtain a single integrated ticket, would you think that you could be provided with a broader choice of transport services (e.g. alternative combinations) when planning your trips?  
 Notes: only the respondents that selected answer option 'Never' in all three cases in Q8 were asked this question. The total number of respondents per country and the number of times each option was chosen are indicated in brackets.

Figure 18 shows that people in the surveyed countries rate their multi-modal travel experience so far as good, with Italy scoring the highest percentage (52% of Italian respondents perceive it as good and 13% as very good). British respondents were the least negative about their responses, with only 3% of respondents indicating a poor experience and none very poor.

**Figure 18 Respondents' rating of their overall multi-modal travelling experience**

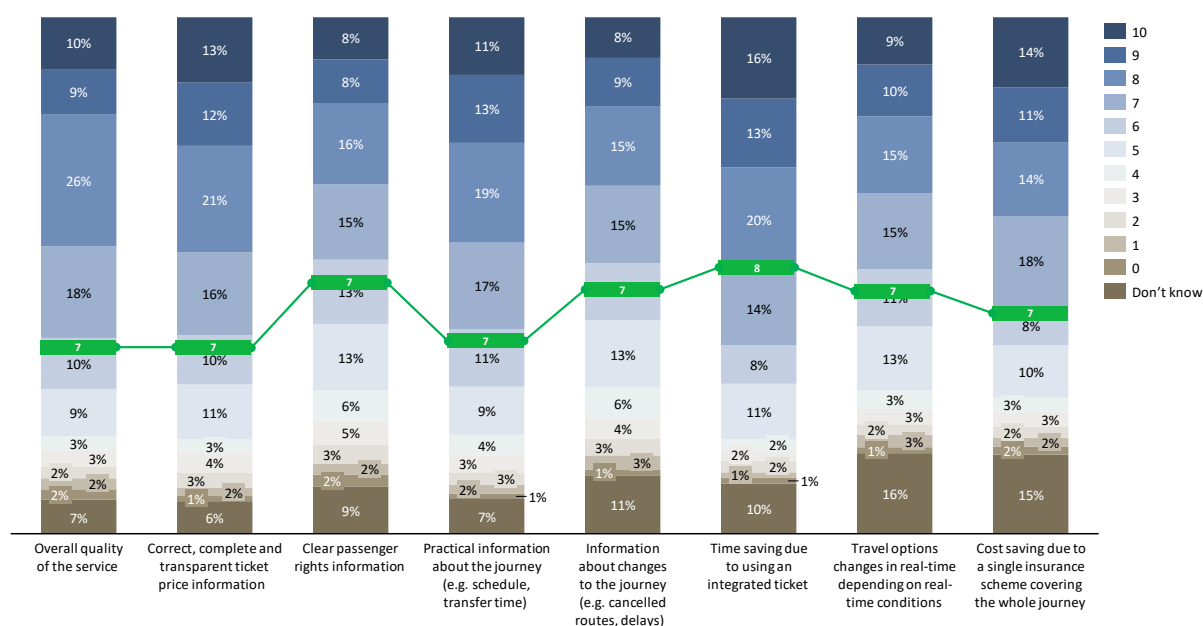


Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Q20. In general, how would you rate your multi-modal travelling experience so far?

People were also asked to evaluate their satisfaction with different aspects of the multi-modal travel services that they had used. These ranged from the overall quality of the service to the provision of information regarding the journey and the price. As can be seen from

Figure 19, the median value of people's satisfaction from the surveyed countries goes between 7 and 8 (where 0 was very dissatisfied and 10 very satisfied).

**Figure 19 Respondents' satisfaction with different aspects of multi-modal journeys**



Source: analysis of respondent data from the DG MOVE passengers' panel questionnaire, N=520, Q21. To what extent are you satisfied with the multi-modal service you have used? Please rate your satisfaction with the following items from 0 to 10 (0 being very dissatisfied and 10 being very satisfied)

Finally, respondents could express their views on what would make their whole multi-modal journey booking experience better. Figure 20 shows, in the form of a word cloud, which factors may positively impact their experience with such a service. As can be seen, a prominent issue is that of the cost of this kind of tickets, which is still perceived as too expensive. People are also demanding clearer and more reliable information regarding their journey, as well as the possibility of managing their booking through a mobile app and of always obtaining a paperless ticket, in order to make the whole process as simple and fast as possible.

Figure 20 Factors that could improve respondents' multi-modal journey booking experience



Source: analysis of respondents' data from the DG MOVE passengers' panel questionnaire, N=350, Q23. In case there is one action that would make your whole multi-modal journey booking experience better, what would it be?



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