



October 2020

Department for Transport

Flexible Fares

Report

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01 Background and methodology

Background and objectives

As part of wider work to reform the railway, the Department for Transport is currently exploring changes to the rail fares system. There will be a focus on ensuring that the rail pricing and ticketing system is keeping pace with changes to the way we work (e.g. more people working part-time or at home) and changes to technology (e.g. smart ticketing), both of which have been accentuated by the COVID-19 pandemic.

With this in mind, the DfT commissioned BritainThinks to explore how the rail industry can better cater for part-time and flexible commuters, by testing variations of a flexible season-type ticket.

Specifically, the objectives for the research, which was conducted in August 2020, were to:

- Explore passengers' current commuting patterns and future commuting intentions in comparison to pre-COVID-19, including number of days a week;
- Explore passengers' views and preferences of all aspects of the different products (pricing, 'bundle size', length tickets are valid, purchasing channel and ticket type);
- Understand if commuters would change their travel patterns/ intentions in response to flexible season tickets becoming available;
- Test how passengers would rate the products against the principles for a good pricing system from the previous BritainThinks research conducted for the DfT on fares and ticketing and against the objectives for the fares trials.

Methodology

BritainThinks undertook a two-phase programme of qualitative research:



A 2-week interactive online community

- 56 participants engaged with the community (from 4th Aug 2020), made up of:
 - 21 full-time rail commuters
 - 21 part-time rail commuters
 - 14 non-rail commuters
- Activities on the community explored:
 - Commuting attitudes and behaviours before COVID-19
 - Expected changes to work and travel patterns in the short, medium and long term
 - Spontaneous preferences for fare types given the current COVID-19 context



Online focus groups

- 8 x 90-minute focus groups, each with 6-7 participants from the online community
 - 3 x groups with frequent rail commuters
 - 3 x groups with flexible rail commuters
 - 2 x groups non-rail commuters
- These discussions explored:
 - Reactions to the flexi-season ticket
 - How if at all these options would change their travel patterns
 - Preferences for various aspects of the flexi-season ticket (bundle size, price etc.)

This research heard from three key groups:



Full-time rail commuters

- Commuted by rail 5 days a week before COVID-19

Part-time rail commuters

- Commuted 1-4 times a week by rail a week before COVID-19 (incl. part time workers and those with flexible homeworking arrangements)

Non-rail commuters

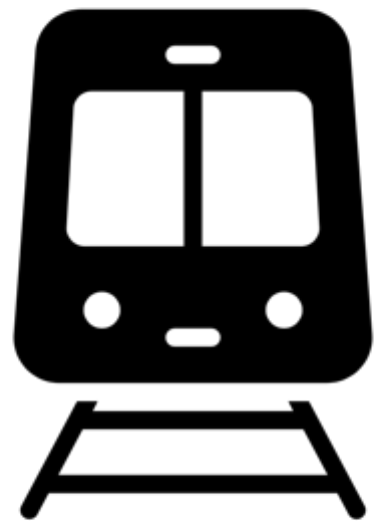
- Commuted by car, bus or bike before COVID-19

A note on qualitative research:

While the qualitative sampling of this project aimed to reflect a spread of demographics and regions among these three groups of commuters, the sample size involved means that it is not statistically representative of commuters in England. As such, the findings that follow should be interpreted as indicative rather than representative of commuters' views nationally.

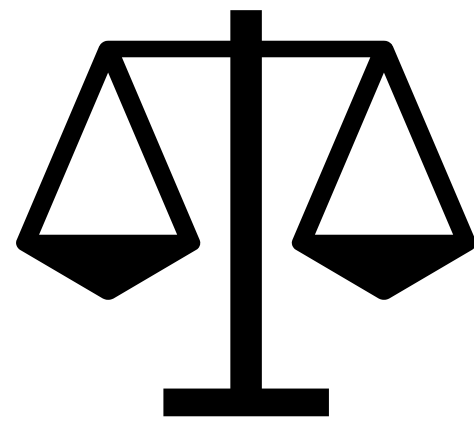
We tested participant responses to the new flexi-season ticket proposal

- And provided participants with the following information:



- *Rather than buying a weekly, monthly or yearly season ticket, rail passengers would be able to buy a **number of 'journey days'** e.g. 5, 10, 20 journey days*
- *For each 'journey day' ticket holders would be able to **travel as much as they want on that day** within the specified route covered by their flexi-season ticket*
- *Journey days would be available as a pre-loaded **smart card or an e-ticket** with a barcode on a smart phone*
- *Journey days have to be used within a certain period i.e. **the journeys expire**, but you can get a refund on journey days if you know that you are not going to be able to use them all*

Our past research identified fairness, simplicity and transparency as important factors of a rail pricing system



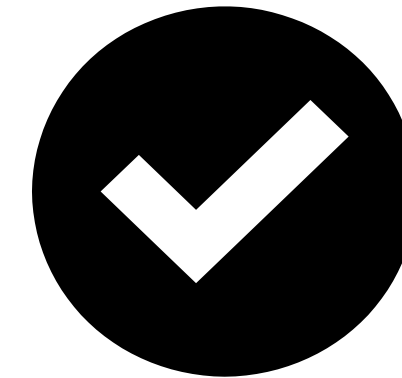
Fairness:

- Value for money
- Does not penalise customers
- All customers treated equally (with an exception for loyalty cards and concessions)



Transparency:

- No hidden costs or attempts to mislead customers
- Feel that the opportunities to save have been clearly communicated



Simplicity:

- Easy to get the most appropriate and/or cheapest price (whether avoiding 'choice overload' or making options easy to navigate)
- Pricing structure easy to understand (either immediately interpretable or has a clearly logical or intuitive structure)

We tested the extent to which the new flexi-season ticket met these principles

02 Key findings

Key findings

1

The idea of the flexi-season ticket was positively received and seen as an appropriate response to the current context.

- **Those who were full-time commuters** saw the ticket as highly relevant to their expected future travel needs and many would expect to purchase one instead of a standard season ticket.
- Views among those who were **part-time commuters** before COVID-19 were more mixed. For some, uncertainty about their future working patterns, and inexperience with season tickets, meant that they didn't feel comfortable committing to a bundle of journeys up front. However, those who anticipated more predictable travel patterns in the future said that they would be willing to try the flexi-season ticket (if the discount made the potential hassle worthwhile).
- While **non-rail commuters** anticipated that the flexi-season ticket would be a positive development for some, the increased flexibility of the ticket was often insufficient to overcome existing barriers to rail travel.

2

While the ticket was well received, there is little evidence from this research that it would generate significantly more rail travel, though it may prevent some commuters from abandoning rail.*

- The idea of using this type of ticket for leisure was far from mind, and when prompted it was not seen as likely to increase rail travel for leisure.
- There were some who used to commute by rail, and planned in the future to commute by car, who said that this ticket might tempt them back to being a rail commuter in the longer term.
- Participants said that it is unlikely to incentivise them to commute *more* than they would otherwise plan to.

Key findings

3

While full time commuters preferred the larger bundle sizes, these were often too large a commitment for part time rail commuters.

- Full-time commuters preferred the convenience of not having to top up so frequently, and therefore many said that they would opt for the 20-journey day bundle size.
- In comparison, part time rail commuters expressed a preference for the 5 or 10 journey bundles, as they were less willing to make a large commitment to journey days up front in case they don't use them all.
- Overall, the bundle validity periods were seen as fair – especially when combined with the refund policy.

4

For almost all participants, a 5% discount on the cost of fares compared to buying on the day was not sufficient.

- Some full-time commuters said that they would buy the flexi season if it represented a 10% discount compared to buying tickets on the day.
- However, many said that they would need a larger discount of 20% to consider committing to any number of travel days up front.

5

The name 'flexi-season' was not seen as appropriate for the ticket, with some saying that the idea of a season could put people off who might think they are committing for a very long period of time.

- Flexi-saver and flexi-pass, among others, were suggested as alternatives.

03 The context

- Commuting before and during COVID-19

Commuting by rail was considered quick and convenient, although sometimes unreliable and frustrating



Full-time rail commuters

- Rail commutes were preferred because:
 - **Quicker** than driving or other public transport (esp. direct routes) – also avoids rush hour in cities
 - **Cheaper** / similar cost to driving and parking
 - **Travel time can be used** for working / listening to music / reading etc

“I chose to get the train because it works out cheaper and also a lot quicker as sometimes the traffic can be bad if you don't leave at the right time.”
(Full-time rail commuter)



Part-time rail commuters

- Flexible commuters saw the benefits of rail travel, but travel less frequently due to:
 - **Not needing to travel everyday**
 - **Finding car commutes quicker or more convenient in certain situations** – e.g. working at a different site or having other responsibilities like school pick-up

“I decide to commute by train for convenience as I don't have to worry about parking or traffic. I would only take the car if I had meetings or had other plans after I finished work.”
(Part-time rail commuter)



Non-rail commuters

- Attitudes to rail travel varied widely:
 - Some viewed it as **inefficient and unreliable**, particularly if there are delays or few direct routes
 - Seen as **tiring**, more so when trains are crowded
 - **More expensive** than other modes of travel, particularly when needing to park at the station
- Travelling by car was preferred by some for offering time alone in a comfortable environment
- And cycling was associated with exercise and freedom

Pre-COVID-19, frequent rail commuters tended to buy season tickets, while less frequent commuters preferred on-the-day purchases

Season tickets

- Popular among frequent rail commuters, they were seen to be:
 - **Better value for money** – some commuters were aware of the exact saving they make over a 12 months period. This feeling of saving was even greater if other discounts are involved
 - **Easy to use** – avoiding queuing and time spent at ticket machines



“It’s easier to buy a continuous ticket rather one individual tickets each day.”
(Full-time rail commuter)

On-the-day tickets

- These were often preferred where:
 - Commuters were **not travelling frequently enough** to for a weekly season ticket to feel ‘worth it’
 - **Flexibility was a key priority**, e.g. for commuters without a set working pattern, or who travelled to different destinations, there was a resistance to being ‘tied down’ to a set number of travel days
 - The on-the-day ticket **cost was seen to be reasonable**



“I don’t want to take the risk of buying a season ticket.”
(Part-time rail commuter)

Rail fares were generally considered value for money if service disruption and overcrowding is kept to a minimum

✓ When running smoothly, rail travel was considered to be good value for money – even when more expensive than other options, due to being quicker and more convenient than other modes of transport

“I’d give it 8/10, it’s slightly more expensive than the bus but it’s quicker.”
(Part-time rail commuter)

- x However, commuters who regularly experienced delays, cancellations and/or overcrowding were more likely to see rail fares as bad value
 - x In this sample this was particularly true of those travelling into central stations in London and Birmingham
- x Services and ticket pricing was seen as inconsistent across the country, so that in some areas passengers were getting less value for money
 - x Fares were not seen to always reflect the length or quality of the commute

“It’s a bit expensive however it does the job, I don’t always get a seat however which frustrates me considering how much I pay.”
(Full-time rail commuter)

COVID-19 has brought about significant changes to commuters' work patterns and travel needs

- Most have seen significant changes to their work routine and as a result, have changed their commute
 - Many have been working from home full-time or are not working (if furloughed or unemployed) so the need to commute has been eliminated
 - Others were splitting the work week between working from home and going into the workplace, so were commuting much less than they were pre-COVID-19
 - Some were subject to staggered working hours so are travelling at different times of day than pre-COVID-19
- Many key workers, however, have not seen a change to their work routine and have been commuting as before
 - Among those who still needed to travel to work, there was widespread concern about using public transport at this time – fears about catching / spreading the virus were prevalent
 - As a result, many were taking precautions:
 - Switching to commuting by car or bicycle as they were seen as a safer options
 - Committing to abiding by safety measures (wearing a mask, social distancing, regular hand washing etc.) if commuting on public transport

“I’m now driving to work when I do have to go in, and I won’t be stepping foot on a train until they find a vaccine.”
(Part-time rail commuter)

Many found it hard to predict how their work and travel will change going forward, but flexible working was seen as here to stay

- There was significant uncertainty about how COVID-19 will continue to impact work and travel in the short and long term, which was not helped by a perceived lack of clarity from employers

Short term view (3 months time)

- Many expected to continue as they are, whether that was working from home full-time or splitting the week between home and the workplace
 - Many said they / their organization has adapted well to working remotely
- Some workers have been told they won't be returning to the workplace before the end of the year

Longer term view (12 months and beyond)

- In the longer term, flexible working was anticipated to be the 'new norm' with less need to be physically present in the workplace
- Some previously office-based workers imagined their employer will move to entirely home-based working
 - Particularly where there has been significant investment in technology to enable home working

Rail commuters who anticipated working from home for at least some of the week in the future said they would consider on-the-day or weekly season tickets over longer season tickets in order to have greater flexibility.

Participants' spontaneous ideas for a new rail ticket to reflect changing working patterns closely aligned with the flexi-season

- Spontaneous ideas for a new rail ticketing system focused on maximum flexibility and value for money through discounts, and considers:
 - Fewer people commuting 5 days a week
 - Work arrangements having to change at short notice (often due to factors outside of the passenger's control)
 - Many people being in a challenging financial situation
- Bulk buying tickets for a discounted price was spontaneously suggested by a number of commuters across the three groups
 - It was suggested these tickets be valid anytime and be eligible for a full refund if unused
- Other ideas included:
 - A loyalty scheme where rail travelers accumulate points for future travel as they travel
 - Oyster-style travel where there are fixed day and week rates for specific zones, charged automatically as you tap in and out

"[I'd like to see] a ticket where you can select how many days you would need to use it for that week or month. That way you don't need to pay the full price of a weekly or monthly ticket just the amount of days you would need it for."
(Full-time rail commuter)

"I think a ticket should be designed to be value for money and flexible. I would like to see a ticket where if you haven't used it then you are able to get a refund."
(Part-time rail commuter)

04 Initial responses to the flexi-season ticket proposal

- Initial reactions
- Possible extent of travel generation

We tested participant responses to the new flexi-season ticket proposal

- And provided participants with the following information:



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- *Journey days have to be used within a certain period i.e. **the journeys expire**, but you can get a refund on journey days if you know that you are not going to be able to use them all*

Across the board there was significant positivity toward the new ticket – particularly among frequent rail commuters

- The new ticketing system aligned with spontaneous ideas from participants
- It was seen as the ‘right time’ for this system to be introduced
 - People were commuting less and see this continuing for the foreseeable future
 - Seen as an opportunity for TOCs/DfT to improve their image by showing they care about passengers and the changes in their lives
- Having the option to seek a refund provided reassurance
 - Participants liked that there is a way to get money back if travel plans change e.g. no longer being required to go to the office

“I think I’d use the flexi ticket because I already know what days I go in so it would save time. I think it would probably be more affordable, but I’d need to check it against my usual day ticket.”

(Full-time rail commuter)

“I really like this idea, I like that it’s already loaded onto an e-card. I like that you can buy a number of journey days. My favourite thing is that you can get a refund as that is the pitfall of the standard season tickets.”

(Full-time rail commuter)

Full-time rail commuters were warm to the proposal but its relevance was less clear to non-rail commuters and some part-time commuters



Full-time rail commuters

- Seen as highly relevant, particularly to those who commuted less than they did pre-COVID-19
 - The season ticket no longer felt like good value, but looking for a saving on on-the-day tickets
- 20-journey bundle was preferred as this audience was often familiar and comfortable paying larger sums upfront to benefit from savings in the longer term



Part-time rail commuters

- Many were able to see the relevance to their travel needs and would consider purchasing
- The smaller journey bundles (5 & 10) were preferred due to travelling less and less familiarity with committing upfront for future travel
- However, some struggled to see the relevance and were happy to stick to on-the-day or advance tickets given their greater flexibility and the avoidance of additional 'hassle' involved in getting a season ticket



Non-rail commuters

- Need for the new ticket was recognised, but struggled to see the relevance to their travel needs
- Used to complete flexibility in regard to rail travel (via on-the-day tickets) so paying upfront for future rail travel felt like a big ask. Having an expiry date was also off-putting
- The new ticket would do little to encourage this group to change the way they commute as barriers to rail travel remain
- Only a very significant discount would encourage this audience to consider buying the ticket

Among part-time rail commuters, those less likely to consider the new ticket travel less have adjusted to travel by car and/or didn't often travel between the same locations

Travel by rail once a week or less

- Saw the FS ticket's expiry as restrictive and applying for a refund as unnecessary hassle
- On-the-day ticket seen to offer the flexibility needed

Have adjusted to travelling by car

- Were able to travel where needed by car, instead of the train, with minimal additional effort / cost
- Saw travelling by car as the safer option right now

Don't travel to/from the same station

- They needed to travel to different destinations for work
- Lifestyle factors meant they are not travelling from the same station each journey (e.g. staying with a partner for some of the week)

In comparison, part time rail commuters more likely to consider the flexi season said that they were likely to have a fairly predictable working pattern / commute.

Despite its popularity, participants said that the flexi-season ticket was unlikely to generate *additional* rail journeys to and from work – though it may stop some from abandoning rail altogether

- Former rail commuters who were considering moving to fully working from home or driving for their commute said that this ticket may lead them to consider rail again
- However, most felt that the number of days that they would commute would be determined by the requirements of the employer or by their own preferences for the mix of home and office working
 - The anticipated cost of rail travel was rarely considered to be a factor as even without the flexi-season it is likely to be less or the same as what commuters were paying before COVID-19

“Nothing would encourage me to travel more often unless I changed jobs or got more hours.”
(Part-time rail commuter)

“I think it might make me more likely because I know I have that flexibility so I’d want to be using it more.”
(Part-time rail commuter)

The ticket was also not spontaneously associated with rail travel for leisure purposes

- The idea of using this ticket for leisure was far from mind and rarely mentioned as a possibility spontaneously
- When prompted, many said that making a commitment to a number of journey days up front didn't align with how they think about their leisure plans
 - Many continued to keep non-essential travel to a minimum, so have shifted to keeping leisure activities local – walking, cycling, or taking a short car journey to get there
- For many, travelling by car represented the best way to travel for leisure
 - It allowed for spontaneity and potentially easier / cheaper group travel
 - Seen as the norm to drive to the city/town centre in locations other than London
- Those who did use trains for leisure can access off-peak tickets if travelling on evenings and/or weekends, and these tickets may represent better value for money than a flexi-season ticket does

“[I would use it for] work only as I do not get the train into Birmingham very often and now I would usually get an uber”
(Full-time rail commuter)

“When I am feeling more confident on travelling via rail, I would probably use this ticket for a mix of both work & leisure.”
(Full-time rail commuter)

Communication about the new ticket should emphasise the savings that can be made, the flexibility it offers and the option for a refund

- Participant responses when asked what is most important to communicate about the new ticket:

“You need to show the flexibility and ease of use, and the savings that can be had by buying a bulk amount.”
(Non-rail commuter)

Make the potential savings and information about the return policy clear using simple terms. Emphasise how it could be helpful with the new flexible way of working.”
(Part-time rail commuter)

“The fact it’s prepaid and flexible are most important. Talk about the refund if you don’t use the tickets.”
(Part-time rail commuter)

- Participants also suggested dropping ‘season’ from the name
 - It was seen to take away from the flexibility the ticket seems to offer and can feel like a bigger commitment that it is
- Alternative suggestions included:

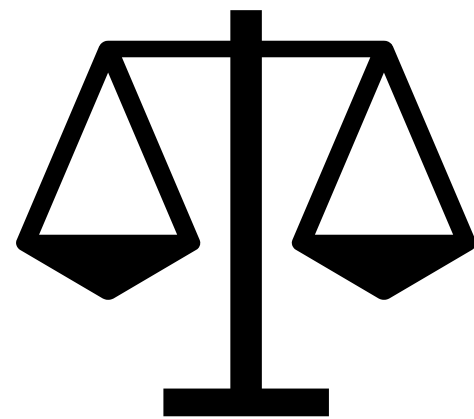
Flexi ticket plus

Flexi-saver

Flexi-pass

“Flexi-season is a bit of an oxymoron to me. You hear season you think about a commitment which doesn’t work with the flexible part.”
(Part-time rail commuter)

We tested the extent to which the new flexi-season ticket met the principles identified in the previous research



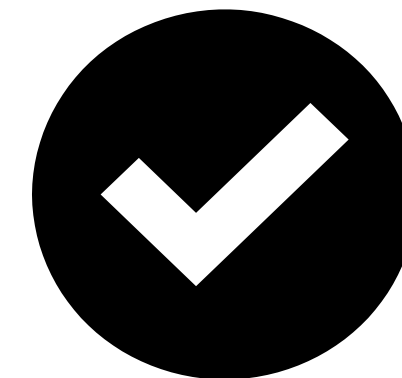
Fairness:

- Value for money
- Does not penalise customers
- All customers treated equally (with an exception for loyalty cards and concessions)



Transparency:

- No hidden costs of attempts to mislead customers
- Feel that the opportunities to save have been clearly communicated



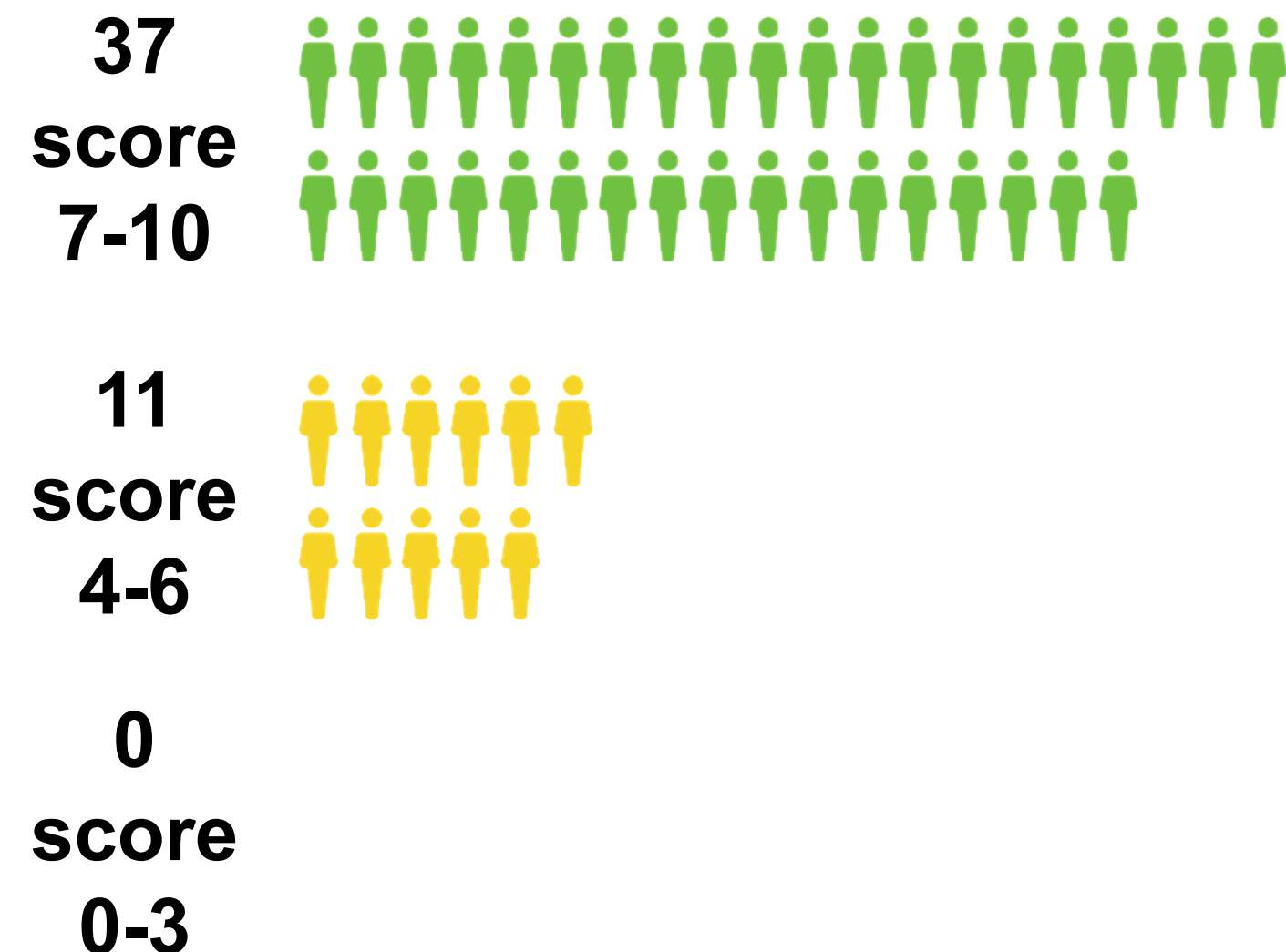
Simplicity:

- Easy to get the most appropriate and/or cheapest price (whether avoiding 'choice overload' or making options easy to navigate)
- Pricing structure easy to understand (either immediately interpretable or has a clearly logical or intuitive structure)

The new flexi-season ticket was widely seen as fair, as it both delivers value for money and does not penalise customers

- There was widespread agreement that the new ticket provides a fair option for the future of commuting
 - Given the anticipated changing commuting patterns, it was seen as providing greater value for money than other available options
 - The options to get the journeys refunded if they won't be used or for the validity to be rolled over when new tickets are bought were also key to this perception of fairness, as many said that they would worry about wasting tickets if this was not an option
- While not spontaneously mentioned, when prompted this ticket was also seen as being fair on the final metric of treating all customers equally

Thinking about this new ticket, to what extent, if at all, would you say that it is fair or unfair?
Please answer on a scale of 0-10 where 0 is very unfair and 10 is very fair.*



The new flexi-season ticket was widely seen as fair, as it both delivers value for money and does not penalise customers

“This seems a much more suitable and fairer way of travelling, adapting to the impact COVID has had on the ways of working and taking into account what people are going to want from train providers. I see this working more than existing methods.”
(Full-time rail commuter)

“I like the idea of the flexi ticket. I have rated it 6 only because of inconvenience of having to either remember to apply for refund for unused days or topping up in time to avoid losing unused days.”
(Part-time rail commuter)

“They're refundable which makes it fair and the validity is extended to the next expiry date which also means that commuters would lose out on less money.”
(Part-time rail commuter)

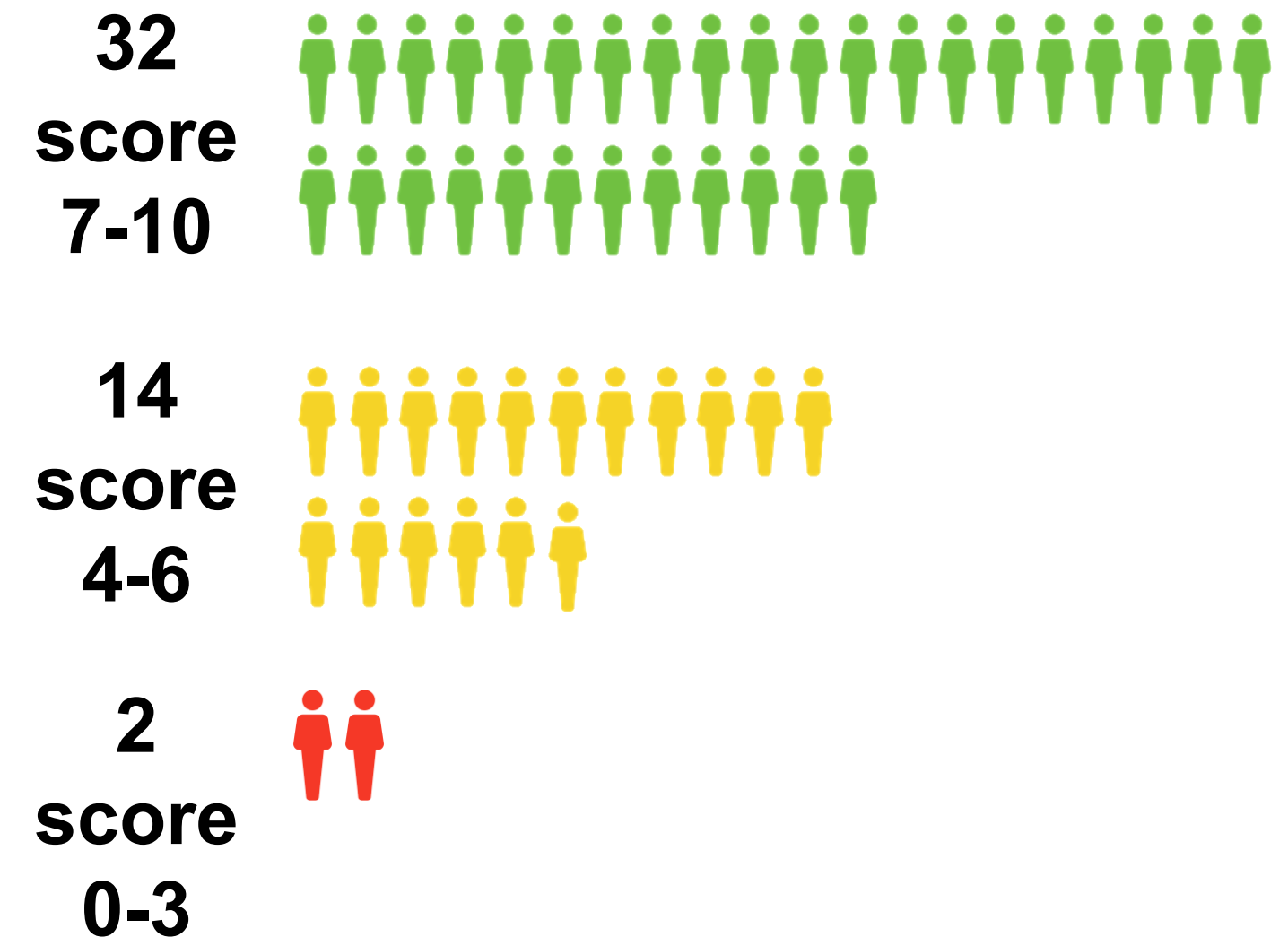
“I think adding the ability to get a refund is essential to making this fair, but I think the process would have to be straightforward and generous, otherwise it won't be worth the risk.”
(Part-time rail commuter)

“The idea of refund reimbursement seems to make it fair. Even carrying over the bundle to have it refreshed and validated.”
(Full-time rail commuter)

For most the flexi-season was seen as clear and transparent. However, some said that they would need some simple clear rules on refunds before they bought

- Most participants said that the ticket seems straightforward to use and would not expect any hidden costs or changes given the clear explanation
- However, some said that they would need to see more information about the refund policy before saying that this ticket lived up to the principle of being transparent
 - Indeed, some were suspicious that the refund policy would contain terms and conditions that could make it difficult to claim money back
 - For some, the expected admin fee associated with a refund was an example of a hidden cost
- Some also said that they would like the potential savings compared to the 'on the day' price to be clearly communicated
 - And that it would need to be clearly communicated if customers would be better off travelling off-peak with an on the day ticket rather than using one of their journey days

Thinking about this new ticket, to what extent, if at all, would you say that it is transparent?
Please answer on a scale of 0-10 where 0 is not at all and 10 is very transparent.*



For most the flexi-season was seen as clear and transparent. However, some said that they would need some simple clear rules on refunds before they bought

"I think it's incredibly transparent and clear and am so impressed that somebody is actually looking at ways to make things better for rail users. It's made me feel so good doing this research and hearing about this idea because it feels to me that they're trying to help commuters rather than just looking at profit margins."
(Part-time rail commuter)

"I can't think of any reason to say it's not transparent. The ticket is simple and the functionality of the ticket is clear."
(Full-time rail commuter)

"I think the ticket itself is transparent. The refund bit is a bit blurred."
(Full-time rail commuter)

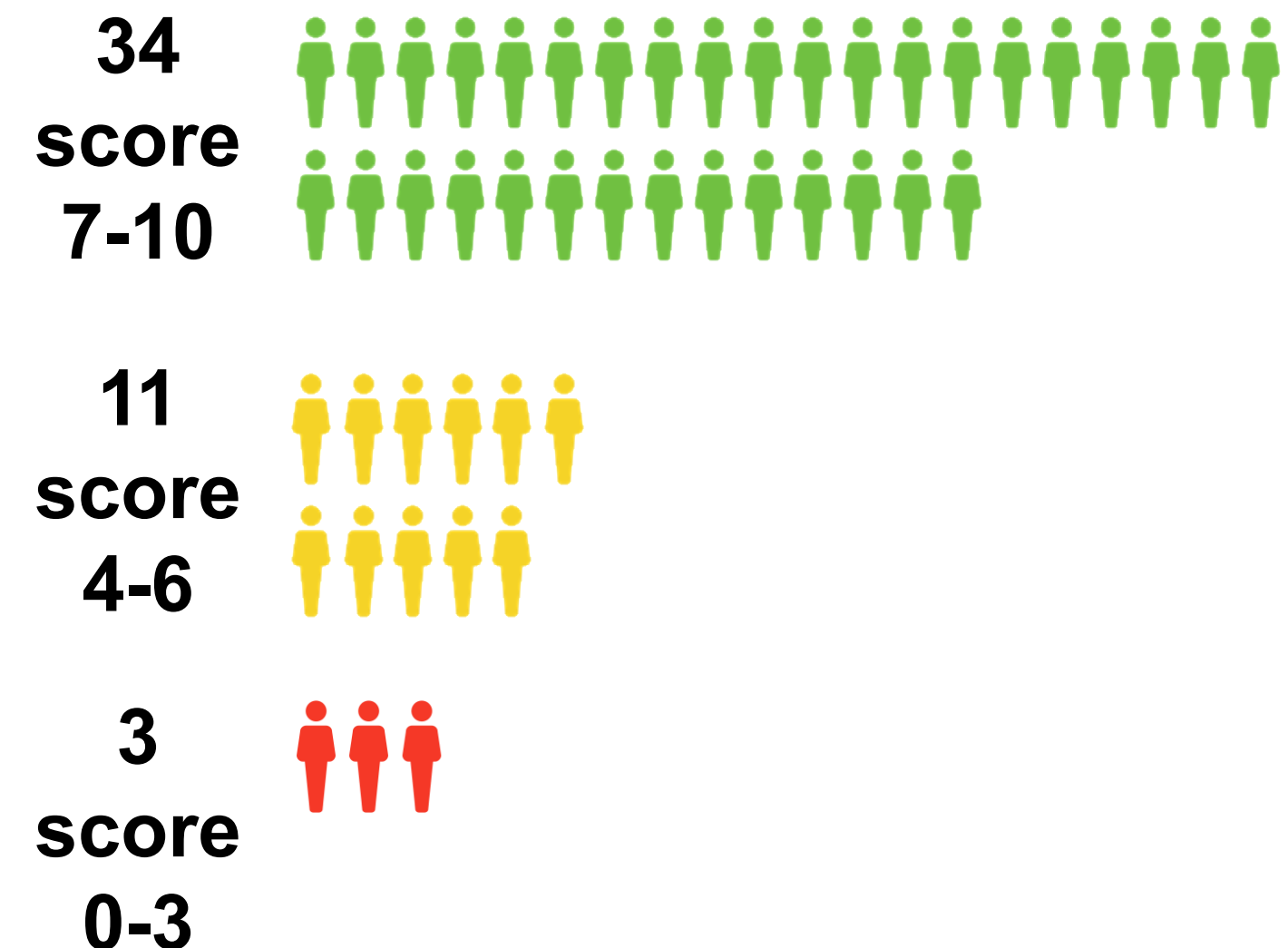
"There's no prices for comparison so you can't be sure."
(Non-rail commuter)

"From what I have understood, it is a pretty clear concept and there is not many complications surrounding when you can use the tickets.."
(Part-time rail commuter)

With the exception of the refund policy, which can be confusing, the flexi-season was widely seen as simple to understand and use

- There was widespread agreement that using the ticket itself would be simple and straightforward
- Many also anticipated that it would help them be able to find the cheapest price for their journeys
 - Though some were concerned that it might not be clear if you should use a journey day for off peak travel or whether you would be better off buying on the day
- While the existence of the refund policy was reassuring, many people assumed that this will be a complicated process or did not quite understand how much they will be refunded for their unused journeys

Thinking about this new ticket, to what extent, if at all, would you say that it is simple or complicated?
*Please answer on a scale of 0-10 where 0 is very complicated and 10 is very simple.**



With the exception of the refund policy, which can be confusing, the flexi-season was widely seen as simple to understand and use

“Very simple to understand. Hopefully the app or website to purchase ticket / apply for refunds be straightforward as well.”
(Part-time rail commuter)

“Fairly easy to understand, as long as the discount is made clear and all the terms and conditions. Seems a much clearer process for people to understand if they choose to buy. Not much about it that would cause confusion.”
(Non-rail commuter)

“It is easy to understand, it takes 30 seconds to explain, the whole concept is very simple and would be effective.”
(Full-time rail commuter)

“The ticket itself is simple, I can’t get my head round the refund bit!!”
(Full-time rail commuter)

“The idea is simply, but the whole 'refresh' system confuses me quite a lot.”
(Part-time rail commuter)

05 Responses to the flexi-season ticket in practice

- Bundle size and validity
- Pricing
- Retailing

Preferences for bundle size were mixed and depended on how willing commuters were to pay upfront for future travel

Options presented to participants

- *A bundle of 5 days of travel, valid for 1 month*
- *A bundle of 10 days of travel, valid for 2 months*
- *A bundle of 20 days of travel, valid for 3 months*



Full-time rail commuters

- Among this audience there was a preference for **the 20-journey bundle**
- They were generally more comfortable / used to making an upfront payment for train travel, and could see benefit in not having to buy a new bundle as frequently



Part-time rail commuters

- Views were mixed among this audience:
 - **The 5-journey bundle** was attractive to those reluctant to commit to a large upfront sum for future travel, and a good way to test if the ticket represents value for money
 - **The 10-journey bundle** was seen to offer greater flexibility than 5 journeys due to the longer validity period, particularly among those uncertain about how often they will be commuting each week

- The periods of validity felt right for most, particularly when paired with the option to apply for a refund and the ability to 'refresh' unused tickets if a new bundle is purchased
 - These features provided reassurance that even if tickets are nearing expiry there is a way to get something back on the initial investment
 - The only exception was some non-rail commuters would want to see longer expiry periods to make the ticket 'worth it' for them

Offering the flexi-season ticket at 20% cheaper than on-the-day tickets felt attractive and realistic

- Three options for pricing were presented to participants to understand what kind of discount would encourage commuters to consider buying the flexi-season ticket. The 5% saving was presented first

5%	<ul style="list-style-type: none"> • 5% saving was seen as far too little to make the commitment of buying up front and the potential 'hassle' of having to apply for a refund seem worth it
10%	<ul style="list-style-type: none"> • Some accepted this level of discount, particularly full-time commuters who were more used to committing to a number of journeys up front
20%	<ul style="list-style-type: none"> • Among those who were able to see relevance in the flexi-season ticket, most would consider buying it for this kind of discount. It was seen as an appropriate saving for the commitment required. It was spontaneously suggested by several participants. <ul style="list-style-type: none"> • Non-rail commuters said that they would need an even greater discount (40-50%) to convince them to try the flexi-season

There was widespread acceptance that the flexi-season wouldn't provide as good a discount as a traditional season pass (circa. 30%), as participants said that this ticket offers greater flexibility and requires less of a commitment.

There was widespread acceptance of the flexi-season being handled through an e-ticket or smart card

- A large proportion of participants were already using e-tickets on their smartphones or pre-paid cards such as Oyster, and would feel comfortable using this technology for the new ticket
- Even those who tended to buy at the station on the day are open to buying the new ticket online
- Participants suggested they would like to have:
 - A way to keep track of journeys used, through a linked app or website
 - Information in stations about where / how to get help as the system is launched



"I'd be fine to buy online. I can't remember the last time I bought a ticket in the station. I always buy online."
(Part-time rail commuter)

"What I would want to see is some info in the station about who I could talk to, where I could go, if I needed some help. Just when I begin using it."
(Part-time rail commuter)

Key findings

1

The idea of the flexi-season ticket was positively received and seen as an appropriate response to the current context.

- **Those who were full-time commuters** saw the ticket as highly relevant to their expected future travel needs and many would expect to purchase one instead of a standard season ticket.
- Views among those who were **part-time commuters** before COVID-19 were more mixed. For some, uncertainty about their future working patterns, and inexperience with season tickets, meant that they didn't feel comfortable committing to a bundle of journeys up front. However, those who anticipated more predictable travel patterns in the future said that they would be willing to try the flexi-season ticket (if the discount made the potential hassle worthwhile).
- While **non-rail commuters** anticipated that the flexi-season ticket would be a positive development for some, the increased flexibility of the ticket was often insufficient to overcome existing barriers to rail travel.

2

While the ticket was well received, there is little evidence from this research that it would generate significantly more rail travel, though it may prevent some commuters from abandoning rail.*

- The idea of using this type of ticket for leisure was far from mind, and when prompted it was not seen as likely to increase rail travel for leisure.
- There were some who used to commute by rail, and planned in the future to commute by car, who said that this ticket might tempt them back to being a rail commuter in the longer term.
- Participants said that it is unlikely to incentivise them to commute *more* than they would otherwise plan to.

Key findings

3

While full time commuters preferred the larger bundle sizes, these were often too large a commitment for part time rail commuters.

- Full-time commuters preferred the convenience of not having to top up so frequently, and therefore many said that they would opt for the 20-journey day bundle size.
- In comparison, part time rail commuters expressed a preference for the 5 or 10 journey bundles, as they were less willing to make a large commitment to journey days up front in case they don't use them all.
- Overall, the bundle validity periods were seen as fair – especially when combined with the refund policy.

4

For almost all participants, a 5% discount on the cost of fares compared to buying on the day was not sufficient.

- Some full-time commuters said that they would buy the flexi season if it represented a 10% discount compared to buying tickets on the day.
- However, many said that they would need a larger discount of 20% to consider committing to any number of travel days up front.

5

The name 'flexi-season' was not seen as appropriate for the ticket, with some saying that the idea of a season could put people off who might think they are committing for a very long period of time.

- Flexi-saver and flexi-pass, among others, were suggested as alternatives.

Thank you

For more information:

Viki Cooke: vcooke@britainthinks.com

Andy Barker: abarker@britainthinks.com

+44 (0)207 8455880

BritainThinks
Somerset House
Strand
London
WC2R 1LA

britainthinks.com