



Department
for Transport

SYSTRA

THE
TAVISTOCK
INSTITUTE®

DfT Flexible Season Ticket evaluation – Final Report

November 2022

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Executive summary

Introduction

The Spring 2021 [Williams-Shapps Plan for Rail](#) set out the government's plan for a revolution on the railways in Great Britain. A key part of this plan is a major reform programme in relation to rail fares, ticketing and retailing which is being undertaken by the Department for Transport (DfT), in collaboration with industry partners. The Plan for Rail included the announcement of Flexible Season Tickets. The Flexible Season Ticket was introduced for the growing number of people who do not commute every day, reflecting both a change in working patterns evident before March 2020, and the acceleration of this trend since the beginning of the Covid-19 pandemic.

SYSTRA was commissioned by the DfT to undertake an ex-post evaluation on the Flexible Season Ticket product which was launched in June 2021. The key objectives of the evaluation were to provide evidence on the implementation, outcomes and impacts of the Flexible Season Ticket product, during and after the first year of launch.

This report provides a Theory of Change for the product, developed by SYSTRA and the Tavistock Institute, and the evaluation findings. The evaluation findings are based on:

- Two waves of a survey with rail users travelling 2-4 days per week developed for this evaluation (one after the product had been available for six months, and one after the product had been available for one year);
- In-depth interviews with Flexible Season Ticket users; and
- Analysis of rail ticket sales data.

Unless otherwise stated, findings provided throughout this report are drawn from the survey with rail users. The survey was conducted online with rail users who travel 2-4 days per week. The first wave of fieldwork took place between 14th and 23rd of December 2021, and the second wave between 1st and 15th of June 2022. Full details on the methodology are provided in Section 1 of this report.

To what extent does the Flexible Season Ticket support rail passenger needs?

- The Flexible Season Ticket was introduced during the Covid-19 pandemic when rail travel was subdued. Wave 1 of the research was undertaken when working from home guidance was in place, but Wave 2 of the research, undertaken in June 2022, was undertaken when rail travel had bounced back, although still not yet at pre-Covid levels. The future pattern of rail travel is still emerging, with sales of the traditional season ticket products - Weekly, Monthly and Annual - remaining suppressed.
- The number of Flexible Season Tickets sold has remained broadly steady since March 2022, with peaks of sales approximately every four weeks, suggesting repeat purchases as the product runs out. The volume of Flexible Season Ticket sales is approaching the number of Monthly Season Ticket sales in some weeks.
- The Flexible Season Ticket appears to support the rail needs of part-time commuters (those travelling between two and four days a week) as repeat purchase is high, with the majority of users purchasing more than one Flexible Season Ticket.
- Survey respondents' (which was based on passengers who travel 2-4 days per week by rail) perception of the product is very positive, with agreement that it meets the needs of part-time commuters and reflects emerging travel patterns by both Flexible Season Ticket users and non-users.
- Intended future purchase of Flexible Season Tickets is also high, again suggesting the product is meeting the needs of current users. Almost all survey respondents who had previously purchased a Flexible Season Ticket were intending to purchase another one, either immediately or within the next month (93% in Wave 2 and 80% in Wave 1); half of respondents who had not previously purchased a Flexible Season Ticket thought it was likely they would do so in the future.
- Those who were not previously aware of the Flexible Season Ticket at all or were unaware how it worked were more likely to predict purchasing the product in the future, compared to those with at least some awareness. Over half of survey respondents who had not used a Flexible Season Ticket cited lack of awareness as one of the reasons why they had not used one, so lack of awareness is affecting uptake.
- Future rail travel patterns are anticipated to change, and the Flexible Season Ticket may need to adapt to continue meeting the needs of current users. Respondents predict an average number of commutes of twelve days per month in a year's time, assuming no Covid restrictions are in place. This is four more days than one Flexible Season Ticket offers within a 28 day period, although it is possible to purchase more than one Flexible Season Ticket within the same period.

To what extent has the Flexible Season Ticket retained customers and/or increased demand?

- A minority of Flexible Season Ticket users reported that the product had encouraged them to continue to use the train, and most product users reported additional journeys made as a result of having a Flexible Season Ticket.
- Rail passengers who travel 2-4 times a week believed that the Flexible Season Ticket encourages people to use the train, rather than other ways of travelling, and this is particularly the case for Flexible Season Ticket users.
- For those who have used a Flexible Season Ticket, whilst the majority would continue travelling by rail if the product was not available (some of whom would change their frequency or time of travel), nearly one in five would switch away from rail to another mode.
- A large majority of Flexible Season Ticket users reported that the product had encouraged them to travel by train more often, with an average of around two more return rail journeys made during the product's time period, due to using a Flexible Season Ticket.

What are Flexible Season Ticket holders' experiences and perceptions of the product?

- Flexible Season Ticket sales vary geographically, with users predominantly located in the South East¹. The vast majority of tickets were sold in the South East and East of England regions, which reflects both the higher number of journeys in these regions, but also that Flexible Season Tickets have a higher market share in these regions out of all tickets sold.
- Flexible Season Tickets appear to typically be purchased the day before use of the first trip, through TOC websites and via smartcards, although the Trainline Web & App, which provides the ticket through a barcode is becoming more popular. Usage is highest mid-week (Tuesdays, Wednesdays and Thursdays).
- Smartcard and survey data suggest that a third of Flexible Season Tickets are not fully used, and smartcard data shows that very small proportions of refunds are sought. Ease of refunds for Flexible Season Tickets did not compare as favourably as ease of other aspects of the product, when compared to other ticket types. This suggests user experience would be improved if ease of accessing refunds was improved.
- Some Flexible Season Ticket holders were not aware that you can purchase more than one of these tickets within a 28 day period, and so reported that they use other

¹ This includes the South East and Eastern Government Office Regions

types of tickets if they need to make additional journeys once their Flexible Season Ticket has been fully used.

- The vast majority felt the Flexible Season Ticket had saved them money on their travel costs, although this decreased for those that did not use all the day passes on their most recently purchased ticket. Most felt it compared favourably to other ticket types on a number of attributes including value for money, being easy to use and suitable for travel needs.

What is preventing higher take-up of the Flexible Season Ticket?

- Levels of awareness of Flexible Season Tickets amongst those who had not previously purchased one were low. Over half had not heard of the product at all, whilst about a quarter had heard of it but did not know how it worked. Awareness was particularly low amongst female respondents and those on a household income of less than £28,000. Lack of awareness was the most frequently cited barrier to uptake of the Flexible Season Ticket. Levels of awareness have not changed in the six months between the two waves of surveys.
- There also appeared to be a significant difference in uptake with a higher number of Flexible Season Ticket sales in London and the South East compared to elsewhere in England, through analysis of the ticket sales data.
- A lack of certainty in rail travel patterns, reflected in a reduction of season ticket purchases overall, is likely contributing to the level of take-up of Flexible Season Tickets by non-users. An inability to predict travel patterns within the time period was cited as the second most important barrier to take-up of the Flexible Season Ticket, after lack of awareness.
- Once presented with limited information on Flexible Season Tickets² (and without providing the exact discount each respondent would achieve), perceived value for money amongst those who had not previously purchased one was considered high. Those who thought it offered good value for money indicated they were likely to purchase one in the future.

² The information provided to respondents in the questionnaire was as follows:

The Flexi Season Ticket provides 8 days of travel in 28 days - any time between two named stations. The 8 days of travel do not need to be specified in advance. The Flexi Season ticket offers savings for most commuters travelling during peak times, 2-3 days a week.

- The digital nature of the Flexible Season Ticket is only cited as a barrier by a very small minority of non-users (3%); however, the research was conducted online, meaning that this finding should be treated with caution.
- There were many cited ways in which the product could be improved to encourage use; many of these focussed on increased flexibility, such as the ability to roll-over unused tickets, or freeze the product; and others focussed on increasing the discount available or providing an option for a refund for unused days or an off-peak version of the ticket.
- An increase in the number of journeys, for example from eight to twelve, within the same 28 day time limit, would make Flexible Season Tickets more attractive to many, which is reflective of the commuting sample's prediction of twelve commuting days within a month, in a year's time. However, this may be related to a lack of understanding of multiple tickets being able to be purchased in a 28 day period.

Conclusions

The Flexible Season Ticket appears to be meeting the needs of many rail passengers travelling between two and four days a week, and is viewed positively amongst this cohort of rail passengers. Raising awareness of the product; raising awareness that there is no limit to the number of tickets that can be purchased; making refunds more easily accessible; and consideration of modifications to enable more flexible use, are all likely to encourage further uptake.

1. Introduction

1.1 Policy Context

The Spring 2021 [Williams-Shapps Plan for Rail](#) set out the government's plan for a revolution on the railways in Great Britain. A key part of this plan is a major reform programme in relation to rail fares, ticketing and retailing which is being undertaken by the Department for Transport (DfT), in collaboration with industry partners. The Plan for Rail included the announcement of Flexible Season Tickets. The Flexible Season Ticket was introduced for the growing number of people who do not commute every day, reflecting both a change in working patterns evident before March 2020, and the acceleration of this trend since the beginning of the Covid-19 pandemic.

Currently, the proposals to reform fares, ticketing and retailing are being developed in a context of uncertainty, where there are still many unknowns about what a post-Covid operating environment will look like. The programme will therefore build on existing plans for reform developed prior to March 2020, while updating and expanding these to make the railway as attractive as possible in a post-Covid context.

As part of the reform programme, Flexible Season Tickets (which were in development prior to the Covid-19 pandemic) were announced in Spring 2021 in the Williams-Shapps Plan for Rail. This product has been available to use since 28th June 2021 on all major commuter routes in England.

The policy aims of this product were to:

- Create a new season ticket that works for part-time workers;
- Provide a viable option for people who want to work from home some of the time;
- Encourage passengers back to rail post-Covid who want to commute flexibly;
- Encourage new passengers; and
- Maintain the value of season tickets and peak day returns.

1.2 Flexible Season Tickets

Flexible Season Tickets enable passengers to purchase bundles of return tickets for a particular journey, offering a discount over buying tickets individually. Tickets allow travel

on any eight days in a 28-day period. The discount available varies by route, but follows the following pricing rules:

- An individual Flexible Season Ticket day pass should cost halfway between the price of the Anytime Day Return and the daily price of the 7 Day Season Ticket (dividing the price of the 7 Day Season ticket by 5);
- The default discount offered should be 12.5% off the Anytime Day Return;
- Where the Monthly Season Ticket is cheaper than the Flexible Season Ticket bundle, the bundle should be amended to cost 20% less than the Monthly Season Ticket or where the Anytime Day Return is cheaper than the price of a single day pass, the day pass should be amended to cost 5% less than the daily ticket.

1.3 Study overview and objectives

SYSTRA was commissioned by the DfT to undertake an ex-post evaluation of the Flexible Season Ticket product, with the Tavistock Institute leading the initial work on the Theory of Change.

The key objectives of the evaluation were to provide evidence on the implementation, outcomes and impacts of the Flexible Season Ticket product, after the first year of launch, to understand:

- Whether the product supports new and emerging travel patterns as a result of Covid-19;
- Whether the product encourages additional demand as travel patterns settle as a result of Covid-19;
- Whether the product has retained customers that otherwise would have been lost due to Covid-19;
- The perception and take-up of the product by different demographics, with particular focus on accessibility and affordability;
- How to increase the relevance of the product to e.g. 2-day a week commuters; and
- Uptake trajectory and what encourages movement in and out of the product, including other products used with it.

The study provides a robust evidence base for future policy development, delivery and decision-making. Outputs and lessons from this project will feed into the development of future rail fares, ticketing and retailing policies, and will inform the Department's approach to evaluation of other fares, ticketing and retailing policy interventions.

1.4 Method statement

Four broad tasks were undertaken during the Flexible Season Ticket evaluation:

- The development of a Theory of Change;
- Primary Data Collection in December 2021 and June 2022;
- In-depth interviews with rail passengers who had purchased a Flexible Season Ticket; and
- Analysis of demand impacts using ticket sales data.

Theory of Change is a comprehensive description of how and why a desired change is expected to happen in a particular context. It is based on:

- Knowledge of the context and circumstances;
- Knowledge of what has worked elsewhere in delivering this type of project; and
- The type of outcomes expected from the programme.

An initial version of the Theory of Change based on relevant policy and planning documents was provided by the Department for Transport. This was further developed during and following two Theory of Change workshops with representatives from industry stakeholders. The Theory of Change was used to ensure that the research tools developed for the primary data collection addressed all potential benefits relevant to passengers.

Two **surveys** were undertaken during the evaluation using Yonder Data Solutions' panel. The rationale for this sampling approach was to generate a significant sample of part-time commuters in a cost-effective and efficient way, while targeting an audience which was likely to use Flexible Season Tickets or to consider using them in future rather than relying on (lower) natural fallout. In addition, due to the emergence of new Covid-19 variants in late 2021, the online survey approach provided a more resilient approach to conducting fieldwork, minimising any risk to survey participants as well as the risk of fieldwork needing to be discontinued. However, it should be noted that this approach provides limited evidence on people with no or low internet access as part of this specific study.

The first survey was undertaken with 2,000 people who used rail 2-4 days a week between mid-October and mid-December 2021, or who anticipated doing so in the following six months (assuming no further travel restrictions). The second survey was undertaken with 2,000 people who used rail 2-4 days a week between early May and early June 2022, or who anticipated doing so in the following 6 months³. Quotas for both surveys were set on age, gender, household income and region, broadly according to the profile of respondents set by a nationally representative omnibus survey who travel by rail with this frequency. No weighting factors were applied.

The first survey took place online between the 14th and 23rd of December 2021, when working from home if possible was advised due to the Covid pandemic, and the second survey between the 1st and 15th of June 2022, ahead of train strikes planned for later in June.

To supplement the survey, **in-depth interviews** were undertaken in July 2022 with 13 rail travellers who had purchased the Flexible Season Ticket. All rail travellers who had opted-in to take part in an interview as part of their survey response, and responded to an invitation from SYSTRA to participate in the interviews, were interviewed. These rail passengers were asked about their use of and motivations for purchasing a Flexible Season Ticket to provide a more contextual understanding of how passengers perceive the product, and what motivates them to purchase it.

A **quantitative assessment** was undertaken drawing on LENNON ticket sales data to understand how the new product impacts on passenger demand.

³ It is possible that some individuals responded to the survey in both waves.

LENNON data provides a record of every ticket sale that takes place on the rail network, and includes information on origin and destination, type of ticket and date. It is managed by the Rail Delivery Group on behalf of the DfT. The information it provides allows an understanding of overall demand for the Flexible Season Ticket, and how sales of other ticket types have changed as the Flexible Season Ticket demand has grown.

The full methodology can be found in Annex B.

1.5 Interpretation of findings

Reporting of the primary survey data represents a snapshot of attitudes and behaviours at the time of completing the surveys. The Flexible Season Ticket product had only been available for up to six months when the first wave of primary research for this evaluation was conducted, and a year when the second wave was conducted, and therefore these views have the potential to change over time. In addition, it is likely that working behaviours will have changed between the two waves as Covid restrictions eased in 2022, affecting rail use.

Each survey had a total sample of 2,000 respondents, which would give a margin of error of +/- 2.2% for a 50% finding, with a 95% confidence level. This assumes a simple random probability sampling approach, which was not used in the design of this research; as such, these figures should be treated with caution. The margin of error would vary across the different subgroups and questions; some questions were asked to all respondents, and some were asked to a subgroup. Percentages and sample sizes for each question are reported throughout the report. Unless otherwise stated, only variations which are likely to be statistically significant (based on the above assumptions) are reported.

The primary research was undertaken through an online survey panel, and therefore these respondents are likely to be more comfortable using online devices than the wider population as they are familiar with online processes and have access to the internet.

Commentary in this report is primarily based on the Wave 2 survey due to it being the most recent data. However, where there are marked differences between the two survey waves, the Wave 1 results are shown in graphics, or mentioned in the commentary.

The ticket sales data presented in this report is based on a mixture of four-week periods and daily data depending on data availability of the analysis being undertaken.

1.6 This report

This report provides the evaluation findings one year after the launch of the Flexible Season Ticket. It provides outputs from the development of a Theory of Change, two surveys with rail users who travel 2-4 days a week, in-depth interviews with Flexible Season Ticket purchasers and analysis of ticket sales data.

Chapters 2 to 5 use data obtained from the primary data research, and secondary data analysis, to address each of the following questions in turn:

- To what extent does the Flexible Season Ticket support rail passenger needs?
- To what extent has the Flexible Season Ticket retained customers and/or increased demand?
- What are Flexible Season Ticket holders' experiences of the product?
- What is preventing higher take-up of the Flexible Season Ticket?

Chapter 6 draws together the conclusions of the evaluation, lessons learned and next steps for the remainder of the research programme.

A full methodology can be found in Annex A; the Theory of Change is provided in Annex B; a copy of the questionnaires used in the rail users survey in Annex C; and the topic guide for the in-depth interviews in Annex D.

2. To what extent does the Flexible Season Ticket support rail passenger needs?

Key findings

The Flexible Season Ticket was introduced during the Covid-19 pandemic when rail travel was subdued. Wave 1 of the research was undertaken when working from home guidance was in place, but Wave 2 of the research, undertaken in June 2022, was undertaken when rail travel had bounced back, although still not yet at pre-Covid levels. The future pattern of rail travel is still emerging, with sales of the traditional season ticket products, Weekly, Monthly and Annual, remaining suppressed.

The number of Flexible Season Tickets sold has remained broadly steady since March 2022, with peaks of sales approximately every four weeks suggesting repeat purchases as the product runs out. The volume of Flexible Season Ticket sales is approaching the number of Monthly Season Ticket sales in some weeks. The Flexible Season Ticket appears to support the rail needs of part-time commuters (those travelling between two and four days a week) as repeat purchase is high, with the majority of users purchasing more than one Flexible Season Ticket.

Survey respondents' (which was based on passengers who travel 2-4 days per week by rail) perception of the product is very positive, with agreement that it meets the needs of part-time commuters and reflects emerging travel patterns by both Flexible Season Ticket users and non-users.

Intended future purchase of Flexible Season Tickets is also high, again suggesting the product is meeting the needs of current users. Almost all of survey respondents who had previously purchased a Flexible Season Ticket were intending to purchase another one, either immediately or within the next month (93% in Wave 2 and 80% in Wave 1); half of respondents who had not previously purchased a Flexible Season Ticket thought it was likely they would do so in the future.

Those who were not previously aware of the Flexible Season Ticket at all or were unaware how it worked were more likely to predict purchasing the product in the future, compared to those with at least some awareness. Over half of survey respondents who had not used a Flexible Season Ticket cited lack of awareness as one of the reasons, and so lack of awareness is affecting uptake.

Future rail travel patterns are anticipated to change, and the Flexible Season Ticket may need to adapt to continue meeting the needs of current users. Respondents predict an average number of commutes of twelve days per month in a year's time,

assuming no Covid restrictions are in place. This is four more days than one Flexible Season Ticket offers within a 28 day period, although it is possible to purchase more than one Flexible Season Ticket within the same period.

2.1 Fluctuations in rail travel

Patterns in rail travel since March 2020 have reflected the concerns over Covid-19 and response to government travel restrictions and guidance on working from home.

- Since the pandemic started in March 2020, rail travel has declined significantly, with many previous rail users working from home;
- During the summer and autumn of 2021, where there were limited restrictions and the majority of the adult population were vaccinated, rail travel started to increase, to around 60% of pre-pandemic levels;
- Between December 2021 and January 2022, rail volumes reduced again as government guidance was to work from home where possible; and
- Since January 2022, rail travel has increased as working patterns have stabilised with the removal of travel restrictions, and are now at around 80% of pre-pandemic levels.

Figure 1 illustrates the number of passenger journeys, based on four-week periods of ticket sales data.

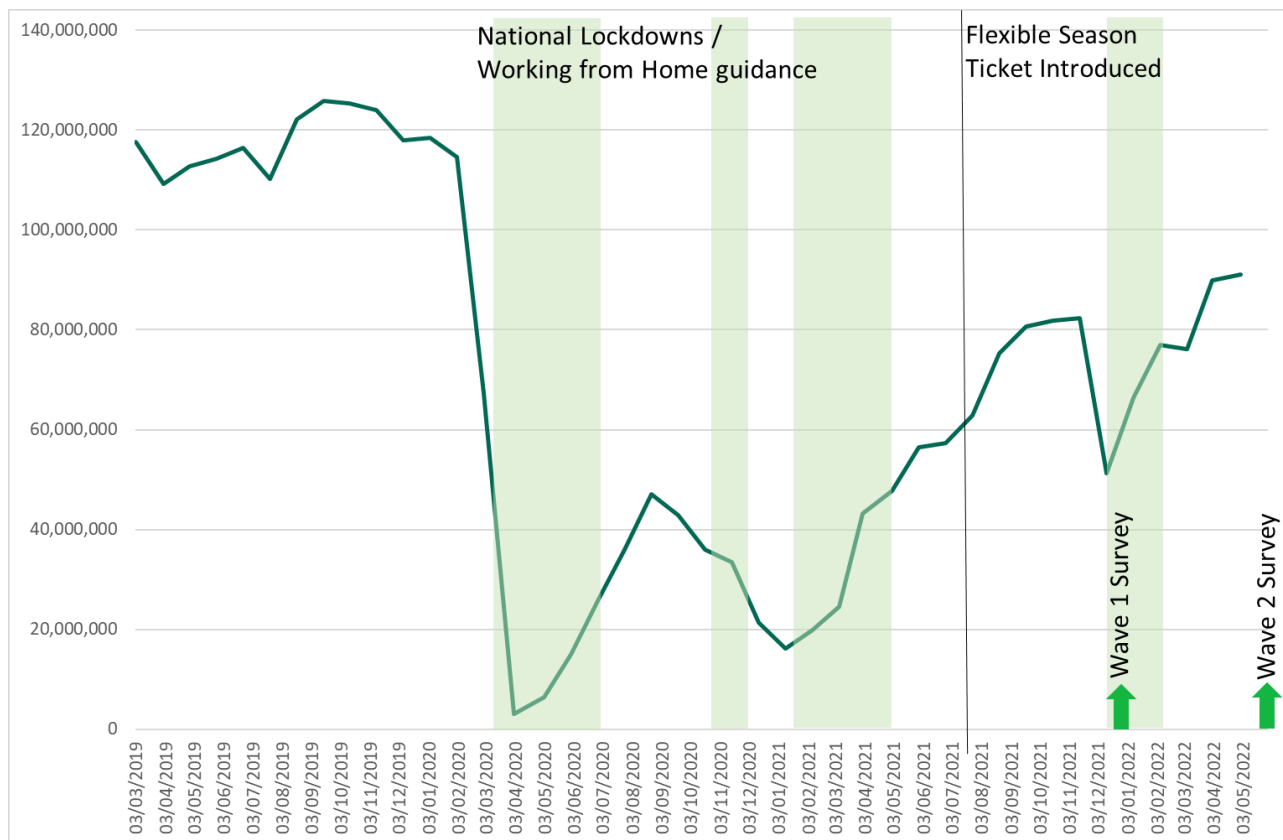


Figure 1: Number of Passenger Journeys Over Time (Source: LENNON data)

The following chart splits passenger journeys into season tickets, typically used for commuting, and other types of tickets, of which a large proportion will be used for leisure travel.

The number of journeys made by season tickets increased slightly during 2021, but has remained fairly stable throughout the first part of 2022, and is considerably lower than the number of journeys made by season tickets prior to the Covid-19 pandemic.

Conversely, the number of non-season tickets increased considerably during 2021, dropped during December 2021/January 2022, but has increased at a rapid rate since then and is similar to pre-pandemic levels in April/May 2022. Alongside people travelling for leisure, the post-Covid non-season ticket journeys are likely to consist of a higher number of rail passengers who are commuting irregularly, i.e. not regularly enough to warrant buying a season ticket.

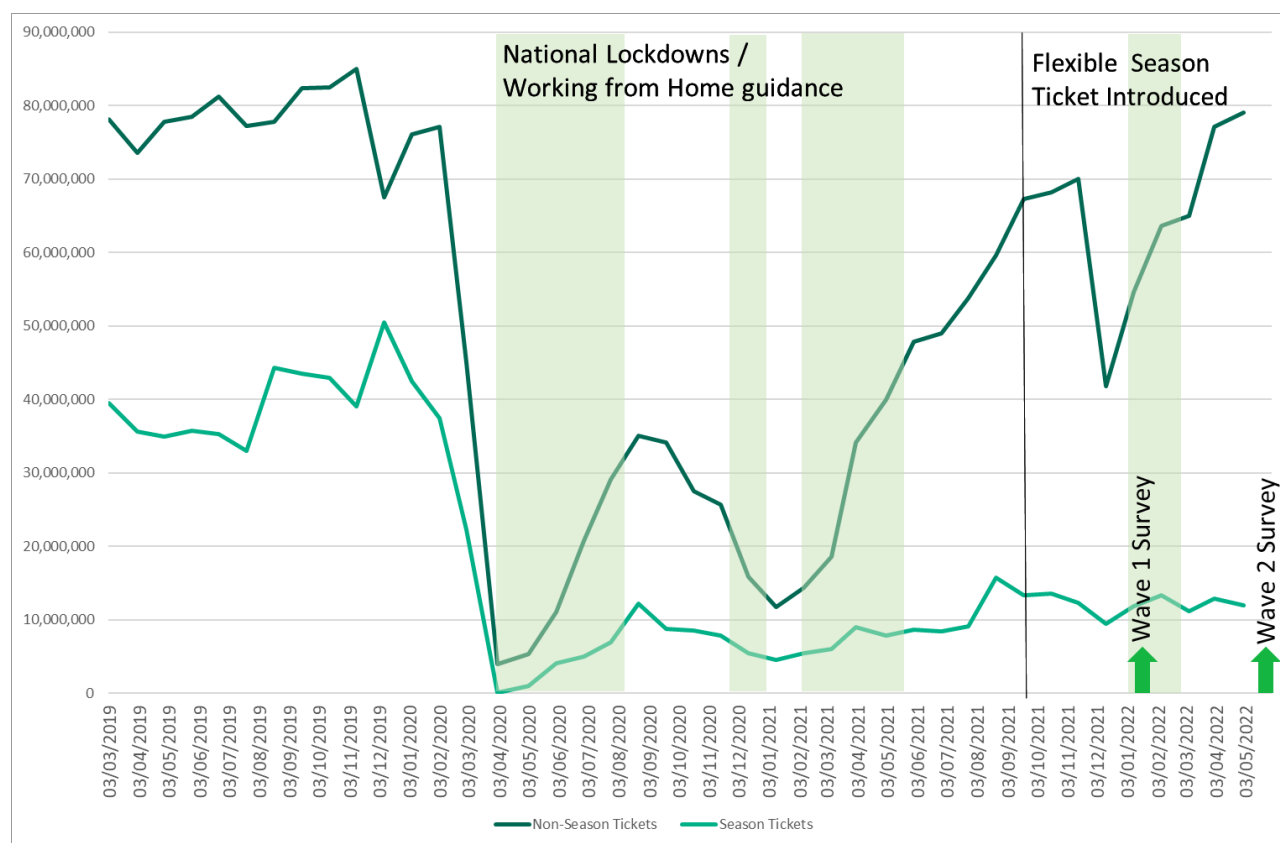


Figure 2: Number of Passenger Journeys Over Time Purchasing Season Tickets and Other Types of Tickets (Source: LENNON data)

2.2 Uptake of Flexible Season Tickets and repeat purchase

Ticket sales of the Flexible Season Ticket started on 21st June 2021 (although could only be used from the 28th June), and as of the 5th July 2022, 301,367 Flexible Season Tickets had been sold, with each product holding 8 day returns, at a value of £52m.

For the first two months, tickets sales remained low, averaging under 300 a day, until 30th August 2021. From then, ticket sales jumped to around an average of 930 sales a day

during September to November, but with a peak every four weeks as people re-purchased their tickets.

Ticket sales declined in December, with government guidelines advocating working from home from the 13th December 2021, before increasing again in January.

During spring 2022, again there was a peak in sales every four weeks, with the exception of a drop around Easter and around mid-June when there were three days of train strikes, with an average of around 1,100 being sold each day. The highest number of ticket sales was on Monday 6th June, with 3,610 Flexible Season Tickets sold.

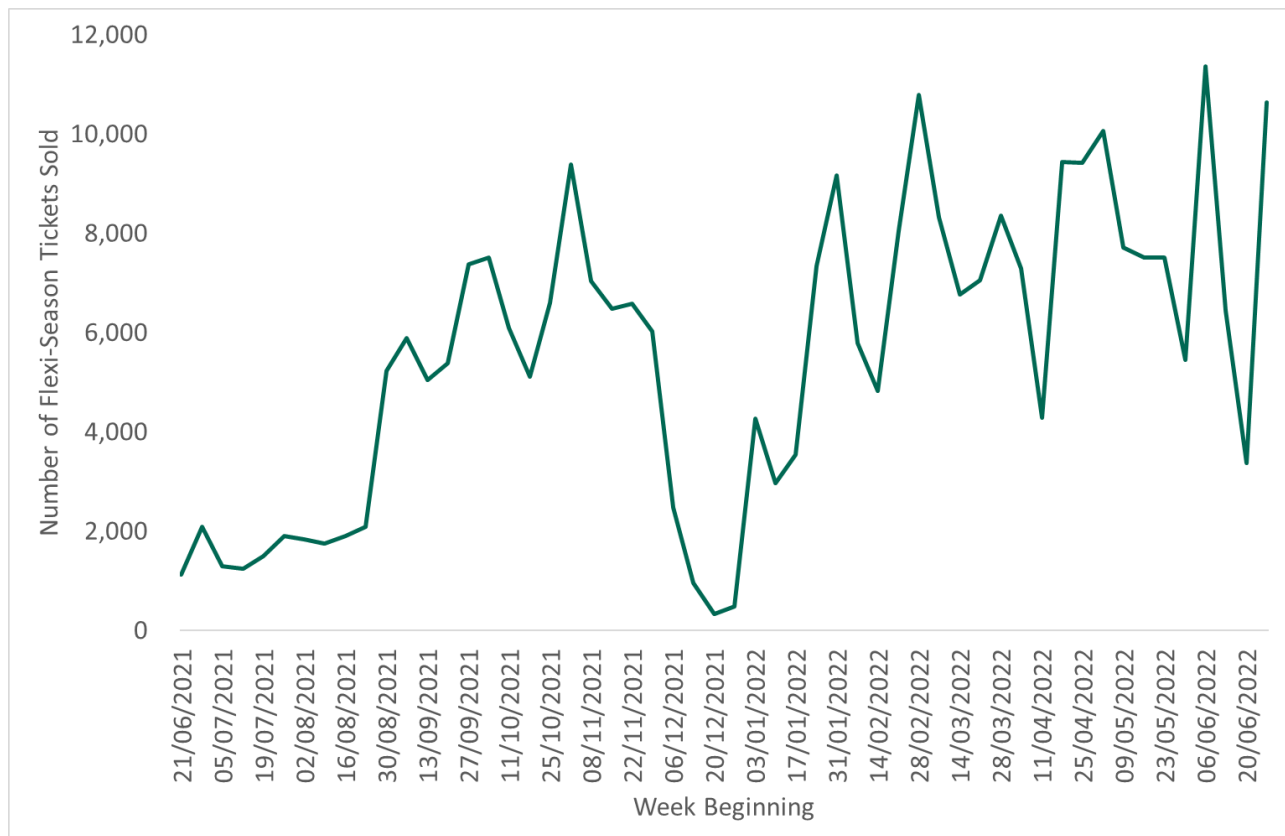


Figure 3: Number of Flexible Season Tickets Sold by Week

Whilst Flexible Season Ticket sales have increased throughout the first year of sales, the market is still dominated by Weekly Season Tickets. However Flexible Season Ticket Sales are approaching a similar sales volume as Monthly Season Ticket sales on some weeks, suggesting that awareness of the product is increasing and the new ticket is meeting the needs of a significant cohort of rail travellers.

Since March 2022, Flexible Season Ticket sales (i.e. bundles of 8 return tickets) have made up at least 8% of these three types of season ticket sales. Note that due to the different number of journeys that can be made by each of these ticket types, the comparison of journeys made by ticket type will show a different distribution.



Figure 4: Weekly Sales of Flexible Season Tickets, Weekly Season Tickets and Monthly Season Tickets

Smartcard data provided by the Rail Delivery Group (RDG) on the 5th July 2022, indicates that there are 55,036 unique smartcards where Flexible Season Tickets have been used⁴, with 204,168 products loaded onto them. This is an average of 3.7 Flexible Season Tickets per smartcard, suggesting that rail passengers are finding the product beneficial to them and are continuing to repurchase the product.

Respondents travelling, or anticipating travelling, on 2-4 days a week were in-scope for the primary research survey conducted for this evaluation, i.e. the assumed travel frequency for the Flexible Season Ticket. Around four in ten (39%) respondents purchased one or more Flexible Season Tickets since they were launched around 12 months ago and 74% of these respondents had a valid Flexible Season Ticket when they completed the survey. This was a similar proportion to the number of respondents in the Wave 1 survey who had used a Flexible Season ticket (39%).

The survey data shows that of those people that had purchased a Flexible Season Ticket, the average number purchased per person since they were launched around 12 months ago is 6.2 (i.e. 6.2 bundles of 8 return tickets). The difference between this average of 6.2 and the 3.7 uses logged per smartcard (from the RDG data described above) may be a result of the survey focussing specifically on rail users travelling 2-4 days per week, and therefore the survey is less likely to capture Flexible Season Ticket users who have only

⁴ The smartcard data was extracted on 5th July and excludes data from barcode products or from GTR-Thameslink (who have their own system), but still accounts for the majority (~90%) of Flexible Season Ticket products.

tried it once or occasionally, and do not use it on a regular basis. The majority of respondents (86%) reported that they had purchased more than one Flexible Season Ticket and a quarter (25%) had bought 10 or more.

In the first survey wave, 6 months after the product was introduced, the average number purchased was 3.6, with 81% of respondents having purchased more than one Flexible Season Ticket. The increase in the average number of tickets purchased between survey waves is likely to reflect passengers' continued interest in the product.

Current Flexible Season Ticket holders who took part in the in-depth interviews had purchased between 1 and 4 Flexible Season Tickets since the product launched. Many reported that they made use of their tickets not only at peak times for travelling to work, but also during off-peak periods (in evenings) and at weekends for leisure journeys.

Previous users of the Flexible Season Ticket who took part in the in-depth interviews varied in their quantities of purchase, with one respondent purchasing 4 tickets across 5 months, and one making their decision on a month-to-month basis depending on their work schedule. Previous users had purchased their tickets for different routes each time, depending on where their work required them to travel, for example for training courses and meeting clients.

From the survey, almost half of respondents (48%) purchased their Flexible Season Ticket on a smartcard only, 26% had used a barcode only, and 17% had used both. This compares to 80% of sales using a smartcard and 20% using a barcode across all Flexible Season Tickets sold.

Table 1 shows how self-reported uptake of Flexible Season Tickets, and the average number of tickets purchased amongst users, varies by demographic characteristics for survey respondents, i.e. rail users who travel 2-4 times a week by rail. Most notably, reported uptake was higher amongst men, those with a household income of at least £28,000, those in London and those with a health problem or disability. Note that passengers whose residence was in London includes only people whose rail journey does not take place wholly within London Zones 1-9.

Table 1: Proportion of respondents who have used Flexible Season Tickets and number of tickets purchased by demographic characteristics (Flexible Season Ticket users, n (Wave 1) = 795, n (Wave 2) = 785)

| Demographic | Category | Number of responses | | % who have used the ticket | | Average number of tickets purchased | |
|-------------------------------------|-----------------------|---------------------|--------|----------------------------|--------|-------------------------------------|--------|
| | | Wave 1 | Wave 2 | Wave 1 | Wave 2 | Wave 1 | Wave 2 |
| Gender | Male | 571 | 549 | 43% | 42% | 3.7 | 6.7 |
| | Female | 223 | 234 | 31% | 33% | 3.1 | 5.0 |
| Household income | Up to £28,000 | 215 | 249 | 32% | 34% | 3.2 | 5.6 |
| | £28,001-£55,000 | 416 | 346 | 45% | 41% | 4.0 | 7.0 |
| | £55,001 and above | 155 | 177 | 44% | 50% | 2.9 | 5.6 |
| Regions of residence | North | 157 | 153 | 36% | 35% | 4.0 | 6.0 |
| | Midlands | 175 | 164 | 36% | 34% | 3.1 | 5.5 |
| | East | 67 | 93 | 34% | 45% | 4.1 | 3.2 |
| | London | 228 | 216 | 66% | 60% | 3.3 | 8.4 |
| | South | 168 | 159 | 31% | 29% | 3.8 | 5.7 |
| Health problem or disability | Yes, limited a lot | 178 | 59 | 71% | 46% | 4.4 | 7.2 |
| | Yes, limited a little | 204 | 182 | 55% | 51% | 3.8 | 6.3 |
| | No | 402 | 525 | 29% | 35% | 2.9 | 5.9 |

2.3 Passenger perception of the extent to which the product supports users

Responses to the survey indicate that the majority (81%) perceive the introduction of the Flexible Season Ticket as a positive thing for passengers (see Figure 5).

Respondents most positive about the product included those who have used a Flexible Season Ticket (87%), identified as female (84%) and with a household income of £55,001 and above (87%). Flexible Season Ticket holders that had purchased the product using a smartcard only were more likely to be positive about the introduction of the product (90%) than those who had purchased the product using either both a smartcard or a barcode (86%) or barcode only (81%).

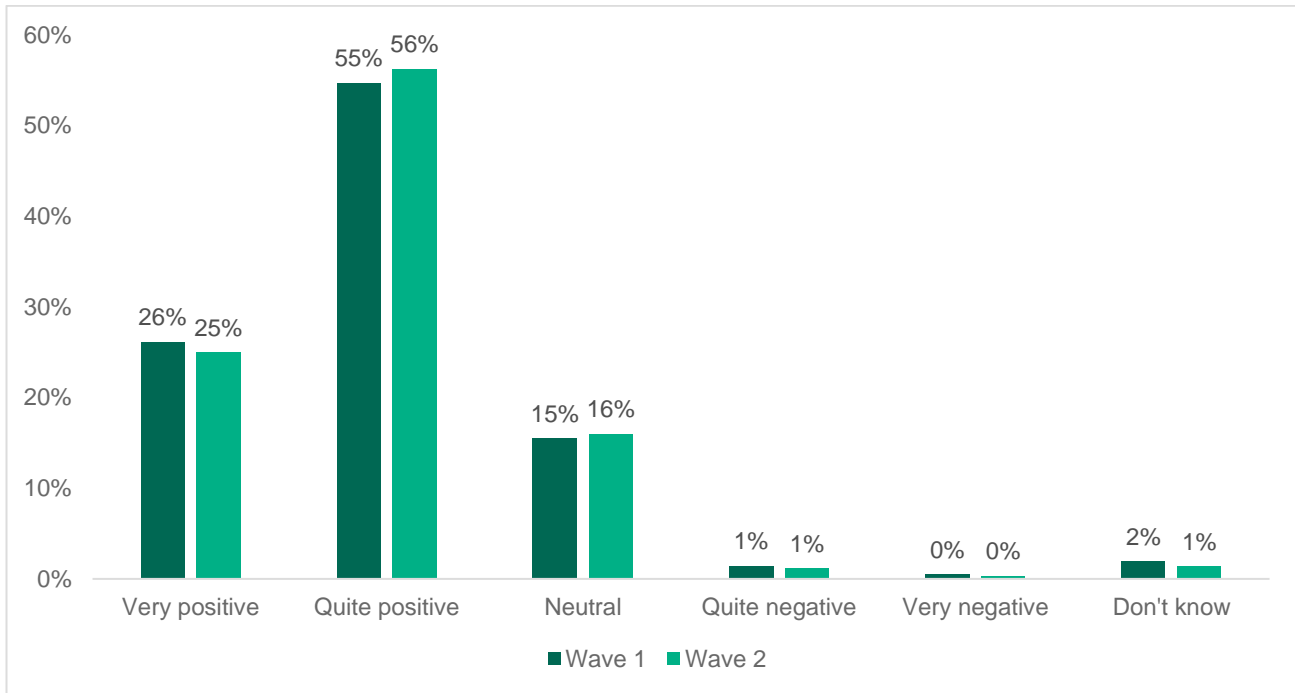


Figure 5: Overall, to what extent do you think the introduction of the Flexible Season Ticket is a positive, or negative, thing for passengers? (All respondents, n (Wave 1)=2,050, n (Wave 2)=2,031)

The majority of respondents agreed with the statements that Flexible Season Tickets offer a better option for part-time workers (76%) and meet the needs of people’s new commuting patterns (73%). To a lesser extent, the majority agreed with the statement that Flexible Season Tickets support people to have a better quality of life (60%).

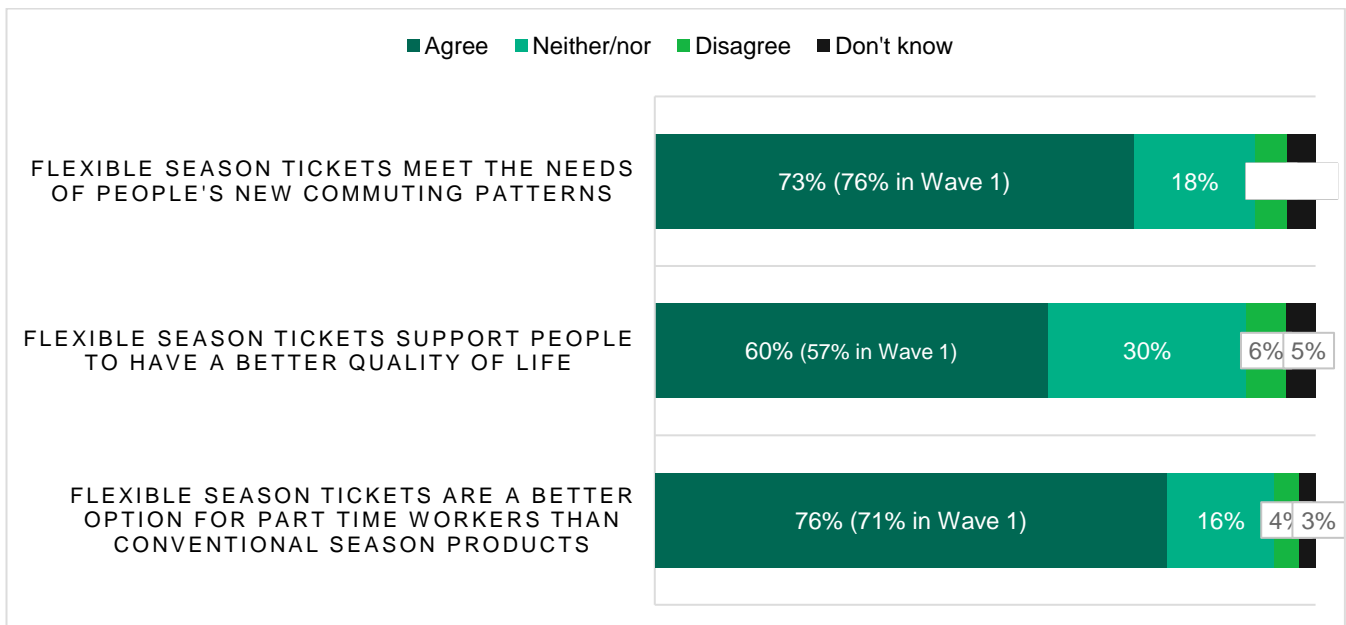


Figure 6: To what extent do you agree or disagree with the following statements on Flexible Season Tickets (All respondents, n (Wave 2)=2,031)

Table 2 summarises the demographic differences for each of the perceptions of Flexible Season Tickets. Statistics from both Waves are included for consistency although the values in italics are not statistically significant.

Table 2: Perception of Flexible Season Tickets by demographic characteristics (people who responded don't know have been excluded from the statistics in the table)

| Perception | Demographics | More likely to agree Wave 1 | More likely to agree Wave 2 |
|--|------------------------------|--|---|
| Flexible Season Tickets offer a better option for part-time workers | Gender | 79% female, 80% male | 83% female, 78% male |
| | Work Status | 81% of those who work part-time, 78% of those work full time | 78% of those who work part-time, 80% of those who work full-time |
| | Household Income | 80% with a household income between £28,001-£55,000 | 83% of those with a household income of over £50,000 |
| | Region of Residency | 83% based in North, 81% in East, 80% in London and 81% in South | <i>84% based in East, 80% in Midlands and 80% in North</i> |
| | Flexible Season Ticket Users | 82% | 81% |
| | Disability | 90% of those with a disability that limits their day-to-day activities a lot | <i>78% of those with a disability that limits their day-to-day activities a lot</i> |
| Flexible Season Tickets meet the needs of people's new commuting patterns | Gender | 76% female, 75% male | <i>78% female, 75% male</i> |
| | Age | 81% of those aged 18-24 | <i>78% of those aged 18-24</i> |
| | Household Income | 80% with a household income between £28,001-£55,000 | 80% of those with a household income of over £50,000 |
| | Flexible Season Ticket Users | 82% | 79% |
| | Disability | 89% of those with a disability that limits their day-to-day activities a lot | <i>74% of those with a disability that limits their day-to-day activities a lot</i> |
| Flexible Season Tickets support people to have a better quality of life | Gender | 59% female, 62% male | 58% female, 64% male |
| | Age | 67% of those aged 18-24 (67%) and 63% of those aged 55-64 (63%) | <i>65% of those aged 25-34 and 66% of those who aged 35-44</i> |
| | Household Income | 67% with a household income between £28,001-£55,000 | 68% of those with a household income of over £50,000 |

| Perception | Demographics | More likely to agree Wave 1 | More likely to agree Wave 2 |
|------------|------------------------------|--|--|
| | Region of Residency | 70% based in London | 74% based in East |
| | Flexible Season Ticket Users | 76% | 74% |
| | Disability | 82% of those with a disability that limits their day-to-day activities a lot | 67% of those with a disability that limits their day-to-day activities a lot |

2.4 Intended future purchase of Flexible Season Tickets

The survey results demonstrate high intended future purchase among current Flexible Season Ticket users, with 93% of respondents who had previously purchased a Flexible Season Ticket intending to purchase another one, over half of whom reporting they would buy one before or immediately when their current ticket expires. Intended timing of future purchase was:

- When all journeys have been used but before the expiry date (25%);
- When the ticket reaches the expiry date (29%);
- Beyond the expiry date: next day or two (2%), next week (6%), within a month (14%), next month (7%) or further into the future (10%).

Only 4% of respondents did not anticipate purchasing another Flexible Season Ticket, and 2% did not know. The most commonly cited reasons for this included being unable to predict travel patterns in advance or over the next 28 day period, or being unable to use up all the journeys on the ticket.

Flexible Season Ticket users who had used both a barcode and smartcard ticket were more likely to intend to purchase another one either immediately or within a month (91%), compared to those who had only used a smartcard (86%) or only a barcode ticket (83%).

Half of respondents (50%) who had not previously purchased a Flexible Season Ticket thought it was likely they would do so in the future; 36% thought it unlikely and 14% did not know. Those who were not previously aware of the Flexible Season Ticket at all, or were unaware how it worked, were more likely to predict purchasing the product in the future (55% and 51% respectively), compared to those partially aware and fully aware of the product (38% and 31% respectively). It is unclear what the reason for this difference is, but it may be that when a rail passenger investigates whether the product would be of value to them, they decide that it is not appropriate for the travel they make. Respondents who had not purchased a Flexible Season Ticket were asked for the reasons why, and over half of them stated lack of awareness. This suggests that lack of awareness is affecting uptake, and this is discussed further in Chapter 5.

2.5 Anticipated future commuting patterns

The Flexible Season Ticket was introduced during the Covid-19 pandemic when rail travel had subdued. Wave 1 of the research was undertaken when working from home guidance

was in place, but Wave 2 of the research, undertaken in June 2022, was undertaken when rail travel had bounced back, although still not yet at pre-Covid levels. The future pattern of rail travel is still emerging, with sales of the traditional season ticket products, Weekly, Monthly and Annual, remaining suppressed.

Respondents to the survey whose most frequently made rail journey was for commuting were asked about their intended commuting travel patterns in about a year's time, assuming no travel restrictions were in place.

These respondents predicted high levels of future commuting flexibility, with around 4 in 10 anticipating the ability to always or very often work from home when they choose (38%); a similar proportion expect to be able to commute off-peak in the morning (36%); and commute off-peak in the evening (36%). The Flexible Season Ticket is discounted against peak fares, not off-peak fares, meaning that those who are able to work more flexible patterns may also consider using off-peak ticket options. Respondents with higher household incomes were more likely to predict the ability to work from home when they choose, in comparison to those with lower household incomes.

Respondents predicted an average number of commutes (either to the office, or another location) of twelve days per month in a year's time, assuming no Covid restrictions are in place. This is four more days than one Flexible Season Ticket offers within a 28 day period, although it is possible to purchase more than one Flexible Season Ticket within the same period. This finding suggests that, for this group of rail users, they may need to purchase the Flexible Season Ticket more frequently (i.e. every three weeks), or the Flexible Season Ticket may need to offer more day passes in the future, to continue to meet their needs.

3. To what extent has the Flexible Season Ticket retained customers and/or increased demand?

Key findings

A minority of Flexible Season Ticket users reported that the product had encouraged them to continue to use the train, and most product users reported additional journeys made as a result of having a Flexible Season Ticket.

Rail passengers who travel 2-4 times a week believed that the Flexible Season Ticket encourages people to use the train, rather than other ways of travelling, and this is particularly the case for Flexible Season Ticket users.

For those who have used a Flexible Season Ticket, whilst the majority would continue travelling by rail if the product was not available (some of whom would change their frequency or time of travel), nearly one in five would switch away from rail to another mode.

A large majority of Flexible Season Ticket users reported that the product had encouraged them to travel by train more often, with an average of around two more return rail journeys made during the product's time period, due to using a Flexible Season Ticket.

3.1 Changes to behaviour if the Flexible Season Ticket was not available

This section focusses on evidence from the survey, as it was not possible to use the ticket sales data to investigate whether demand has increased due to the lack of a stable baseline (due to the Covid-19 pandemic) and the lack of a counter-factual set of flows.

Around three quarters of survey respondents (76%) agreed with the statement that Flexible Season Tickets generally encourage people to use the train rather than other ways of travelling. This was particularly the case for those who had purchased a Flexible Season Ticket (79%), and respondents aged 18-24 (81%).

For respondents who had purchased a Flexible Season Ticket, if the option was not available, four in five would still have travelled by rail (78%). About a quarter would have reduced the frequency of their most frequently made rail journey (24%); conversely, about a seventh would have made the journey by train but more frequently (16%); and the same proportion would have changed the time of travel to off-peak (17%). Significantly, just over one in five would have not made the journey by rail, either making it by another mode (18%) or not at all (4%), suggesting that the Flexible Season Ticket has generated additional demand for rail travel. This is reflected in Figure 7, which also includes the results from Wave 1 which were very similar.

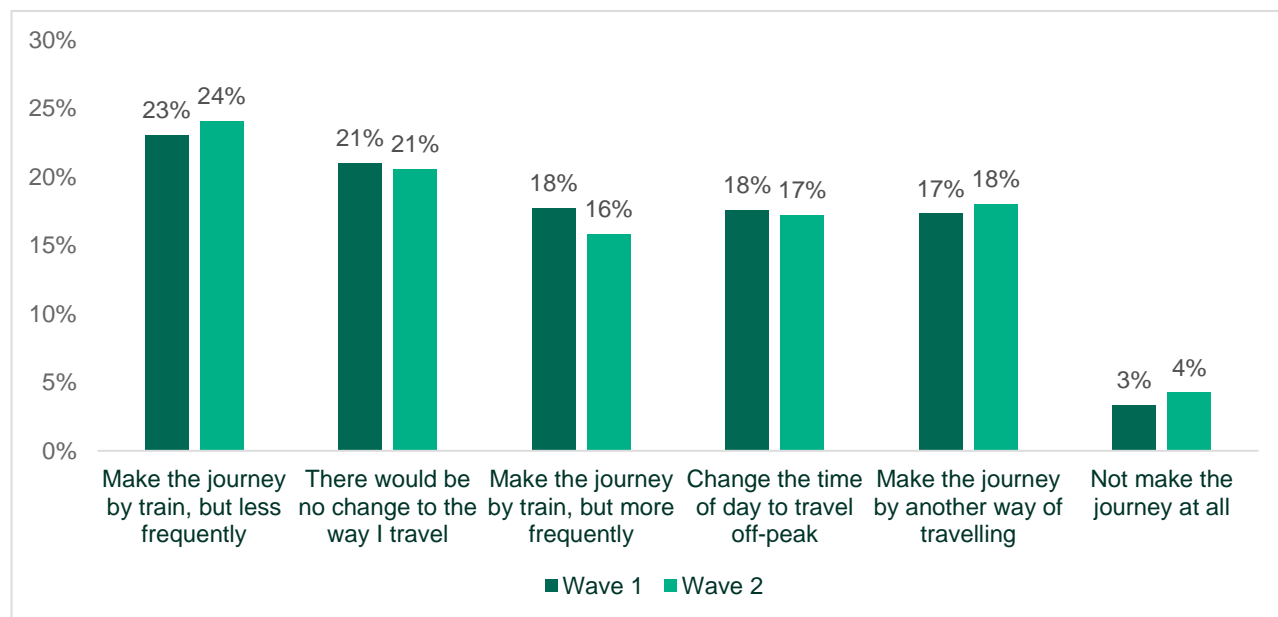


Figure 7: If the Flexible Season Ticket was not available what would you be most likely to do? (Flexible Season Ticket users, n (Wave 1)=786, n (Wave 2)=777)

Responses if the Flexible Season Ticket was not available varied by income in both waves, and additionally by gender and disability in Wave 1, as shown in Table 3. Findings that are not statistically significant are shown in italics.

Table 3: Respondents answering “There would be no change to the way I travel” to the question “If the Flexible Season Ticket was not available what would you be most likely to do?” by demographic group

| | Demographics | Wave 1 | Wave 2 |
|-------------------------------------|-----------------------|-------------|-------------|
| Household income | Up to £28,000 | 24% (n=50) | 18% (n=44) |
| | £28,001-£55,000 | 20% (n=83) | 23% (n=81) |
| | £55,001 and above | 19% (n=29) | 17% (n=31) |
| Gender | Male | 20% (n=111) | 20% (n=110) |
| | Female | 24% (n=53) | 21% (n=50) |
| Health problem or disability | Yes, limited a lot | 14% (n=24) | 15% (n=9) |
| | Yes, limited a little | 16% (n=32) | 20% (n=37) |
| | No | 27% (n=107) | 21% (n=110) |

Respondents were asked about Railcard ownership, including Disabled Persons Railcards, which offer a larger discount on Anytime tickets than the discount offered by using a Flexible Season Ticket⁵. Overall, 4% of respondents owned a Disabled Persons Railcard, and a further 5% indicated they were eligible for one but did not own one. However half of respondents who own a Disabled Persons Railcard said that they had bought at least one Flexible Season Ticket, and similarly, two-thirds of respondents who said they are eligible for a Disabled Persons Railcard but do not own one, have purchased at least one Flexible Season Ticket. It therefore appears that either some people who own a Disabled Persons Railcard are not aware of the relative discount offered by the two types of tickets, or there is some other advantage to some Disabled Persons Railcard holders offered by purchasing a bundle of tickets in one Flexible Season Ticket transaction.

For respondents who would have continued making the journey by rail if Flexible Season Tickets were not available, the tickets that they would have used are shown in Table 4.

⁵ The difference in discount offered varies by route of travel.

Table 4: Proportion who would have used Alternative Ticket Types if the Flexible Season Ticket were not Available (Flexible Season Ticket users, n (Wave 1)=633, n (Wave 2)=612)

| TICKET TYPE | WAVE 1 | WAVE 2 |
|---------------------------------------|--------|--------|
| Anytime Singles/Return | 19% | 27% |
| Off-Peak/Super Off-Peak Single/Return | 18% | 18% |
| Advance | 11% | 16% |
| Day Travelcards | 17% | 11% |
| Weekly Season Ticket | 14% | 14% |
| Monthly Season Ticket | 13% | 10% |
| Annual Season Ticket | 4% | 3% |
| Other | 2% | 2% |
| Don't know | 2% | 1% |

Respondents who had purchased multiple Flexible Season Tickets were more likely to use a season ticket instead than respondents who had only purchased a small number of Flexible Season Tickets. Conversely, respondents who had only purchased one or two Flexible Season Tickets, were more likely to purchase an Anytime ticket if the Flexible Season Ticket were not available than respondents who had purchased multiple Flexible Season Tickets.

3.2 Numbers of additional journeys made due to owning a Flexible Season Ticket

Around four in five respondents (85% in Wave 1 and 79% in Wave 2) thought that having a Flexible Season Ticket encouraged them to travel by train more, whilst just under one in five (14% in Wave 1 and 19% in Wave 2) did not consider it had encouraged more train travel. Respondents estimated a mean of an additional 2 return rail journeys made, or anticipated on their most recent ticket, due to purchasing a Flexible Season Ticket.

The number of additional journeys made due to the Flexible Season Ticket varied by gender (Wave 1 only), income, disability and region:

- Wave 1 respondents identifying as male were more likely to make at least one additional journey compared to those identifying as female (88% compared to 79%);
- Respondents with a household income of £28,001-£55,000 were more likely to make 3 or more additional journeys, compared with those on lower incomes (£28,000 or less) and higher incomes (more than £55,000), (40%, 32% and 24% respectively in Wave 2, and 53%, 29% and 22% respectively in Wave 1); and
- Wave 2 respondents with a disability or health problem impacting their day-to-day lives a little were more likely to make at least one additional journey (90%) compared to those with a disability that limits a lot or with no disability (86% and 74% respectively).

4. What are Flexible Season Ticket holders' experiences and perceptions of the product?

Key findings

Flexible Season Ticket sales vary geographically, with users predominantly located in the South East⁶. The vast majority of tickets were sold in the South East and East of England regions, which reflects both the higher number of journeys in these regions, but also that Flexible Season Tickets have a higher market share in these regions out of all tickets sold.

Flexible Season Tickets appear to typically be purchased the day before use of the first trip, through TOC websites and via smartcards, although the Trainline Web & App, which provides the ticket through a barcode is becoming more popular. Usage is highest mid-week (Tuesdays, Wednesdays and Thursdays).

Smartcard and survey data suggest that a third of Flexible Season Tickets are not fully used, and smartcard data shows that very small proportions of refunds are sought. Ease of refunds for Flexible Season Tickets did not compare as favourably as ease of other aspects of the product, when compared to other ticket types. This suggests user experience would be improved if ease of accessing refunds was improved.

Some Flexible Season Ticket holders were not aware that you can purchase more than one of these tickets within a 28 day period, and so reported that they use other types of tickets if they need to make additional journeys once their Flexible Season Ticket has been fully used.

The vast majority felt the Flexible Season Ticket had saved them money on their travel costs, although this decreased for those that did not use all the day passes on their most recently purchased ticket. Most felt it compared favourably to other ticket types on a number of attributes including value for money, being easy to use and suitable for travel needs.

⁶ This includes the South East and Eastern Government Office Regions

4.1 Where, how and when Flexible Season Tickets are being purchased

Figure 8 shows the Flexible Season Ticket sales by government office regions of the UK (up to May 2022). The vast majority of tickets were sold in the South East and East of England regions, which reflects both the higher number of journeys in these regions, but also that Flexible Season Tickets have a higher market share in these regions out of all tickets sold. Note that it is not possible to purchase a Flexible Season Ticket for trips that take place entirely within Greater London, or entirely within Wales or Scotland, hence the lower number of sales in these regions.

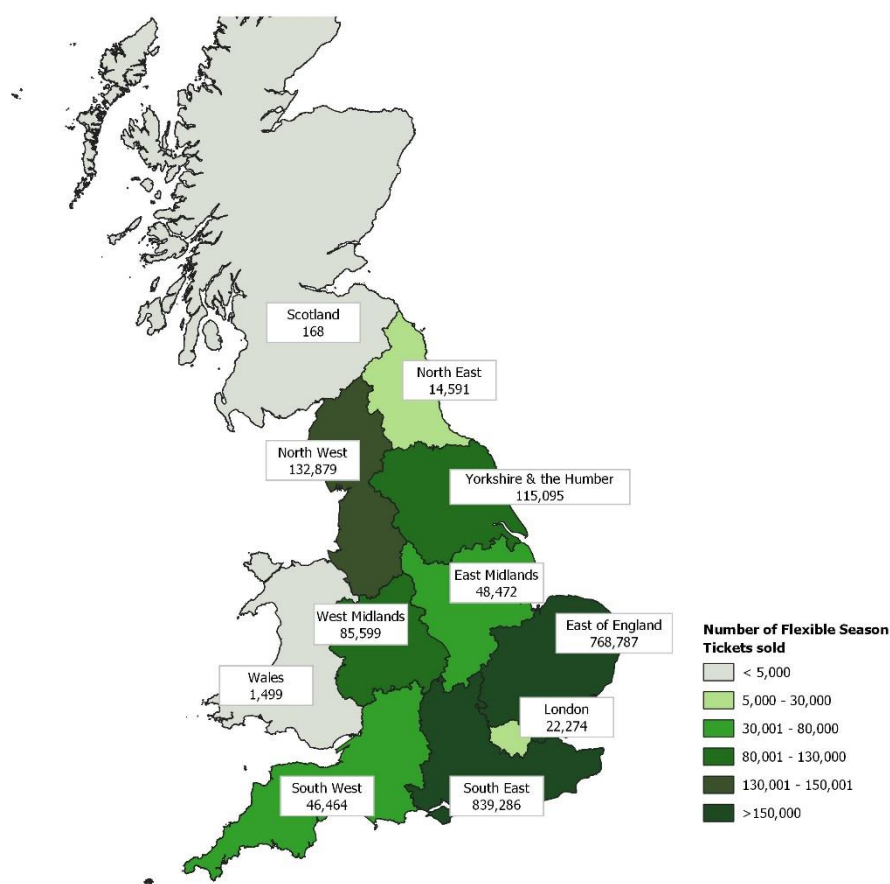


Figure 8: Total Number of Flexible Season Tickets sold by Government Office Regions⁷

The 50 routes where the most Flexible Season Tickets have been sold are shown in Figure 9. These routes are all commuter flows into London.

⁷ Map of Government Office Regions is from [Open Geography Portal \(statistics.gov.uk\)](https://statistics.gov.uk)

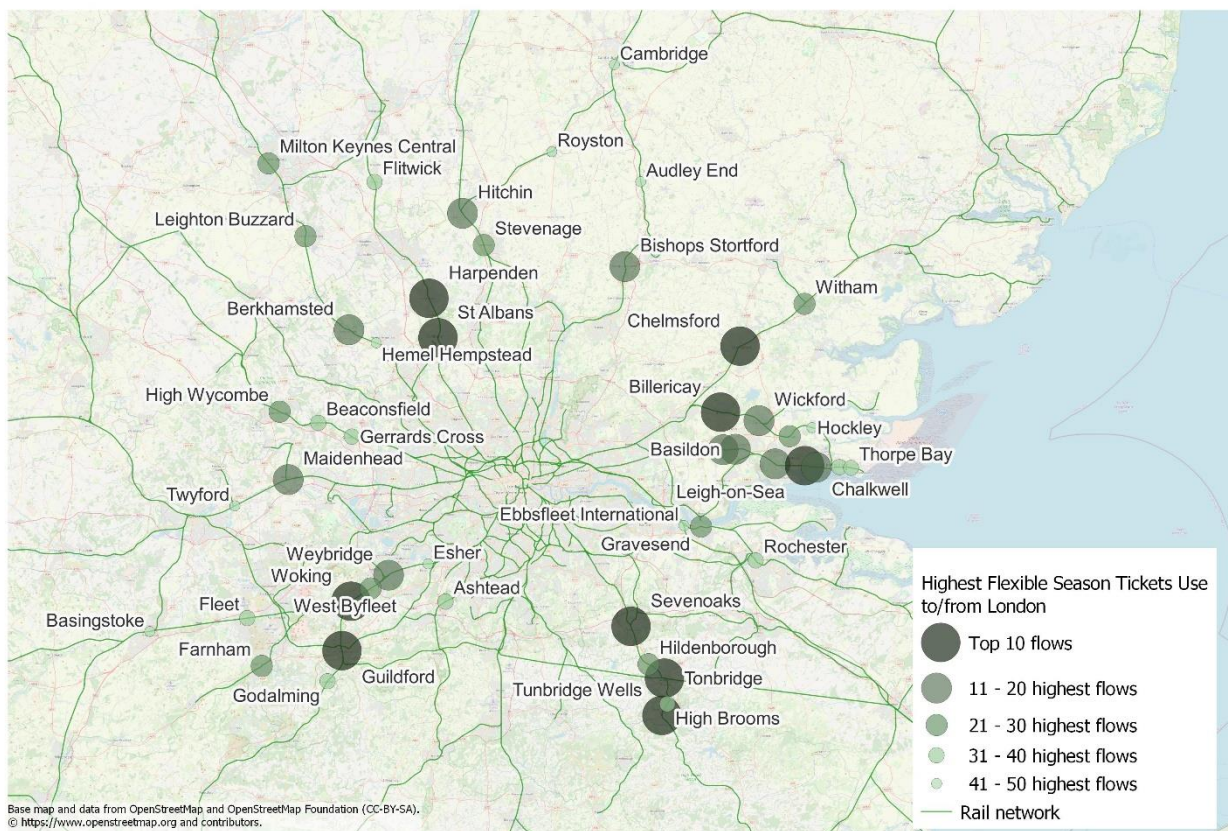


Figure 9: Routes which have sold the most Flexible Season Tickets

Throughout the week, there is a clear pattern of low sales on a Friday and Saturday, and a peak of sales on a Monday, reducing gradually throughout the week. This compares to usage information from smartcard data showing higher usage on a Tuesday, Wednesday and Thursday than other days of the week, with virtually no usage at the weekend.

Respondents in the in-depth interviews indicated a wide range of responses with regard to how far in advance they purchased their Flexible Season Tickets:

- Some purchased around one week in advance of travel, so they have their ticket ready well in advance of travel, or because this is when their shift rotas are posted;
- One respondent always purchased on the first day of each month as this is part of their normal purchasing routine; and
- One respondent sometimes purchased their ticket on their first day of travel to make sure they are maximising their 28-day period of usage.

“My [train] service can be quite unreliable. So I like to make sure it's actually running and not cancelled before I buy it on that first day.”

The tickets are available to purchase on either a smartcard or as a Barcode. When purchased via TOCs, the tickets are generally provided on a smartcard, whereas barcodes are used for non-TOC websites and Apps, such as Trainline. Over the first year of sales,

the vast majority of tickets were purchased through TOC websites, but the Trainline website and app became the single biggest retailer of Flexible Season Tickets in summer 2022. Most Flexible Season Tickets (~80%) are sold for smartcards, although this percentage has reduced over the past six months, suggesting that Barcodes are gradually becoming more popular.

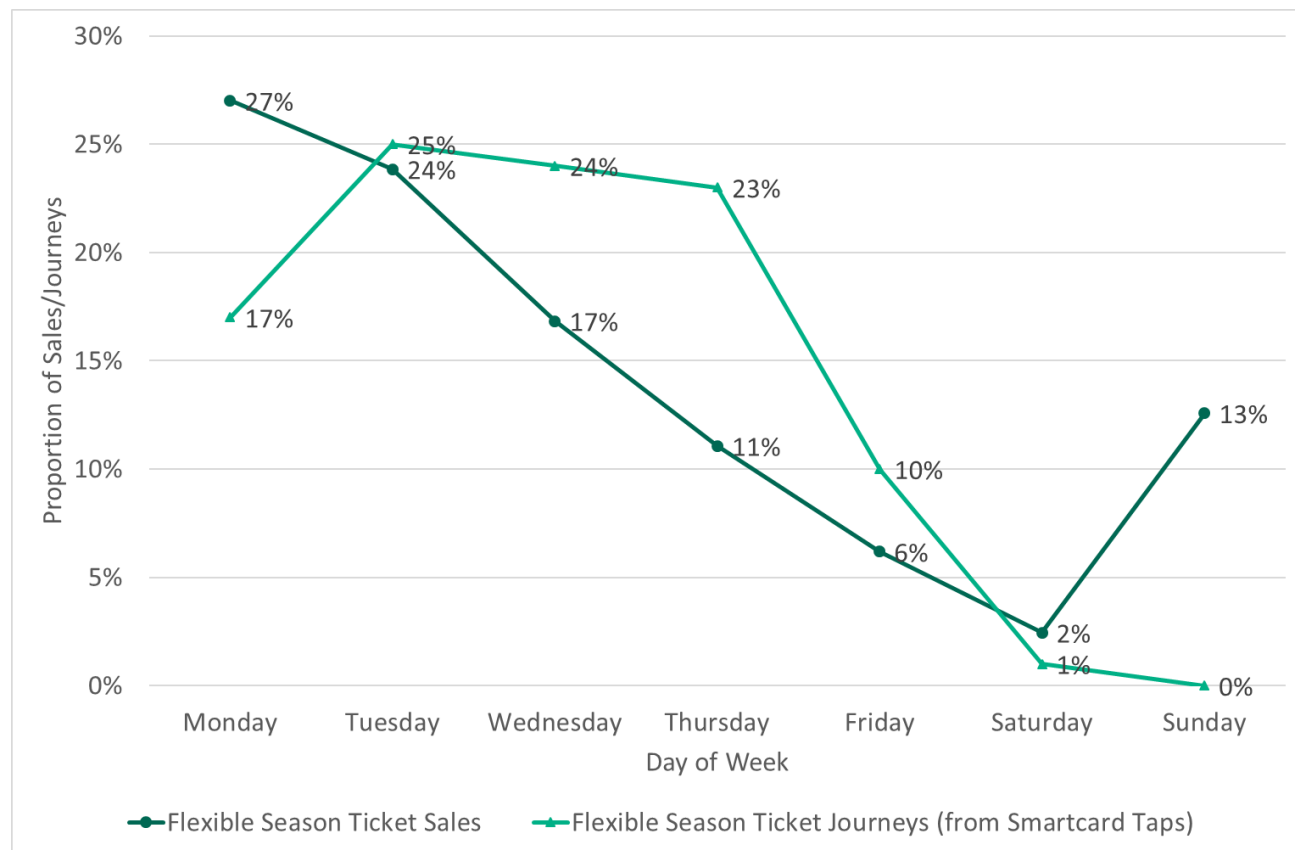


Figure 10: Weekly Profile of Flexible Ticket Sales and Journeys (Taps)

4.2 Number of journeys made on Flexible Season Tickets

Figure 11 provides the proportion of activations on expired Flexible Season Tickets using smartcard data extracted on the 5th July 2022. It shows that around two-thirds of expired products have been fully used (65%), with a further 20% used 6 or 7 times. Two percent of expired products had not been used for a journey (although there is a possibility that some of these products have been used between two ungated stations, and the owner did not activate the product).

Most respondents in the in-depth interviews suggested the station gates were closed at the times they were using their Flexible Season Tickets. One respondent suggested that their station gates opened during some rushes, weekends or in the evenings, but they would still expect to show their ticket in some manner to pass through the gates. In contrast, one respondent noted that the gates at their departure station are often open (but did not specify if this was the case at their arrival station), and felt that people could take advantage of this and avoid using one of their journeys by not scanning their ticket.

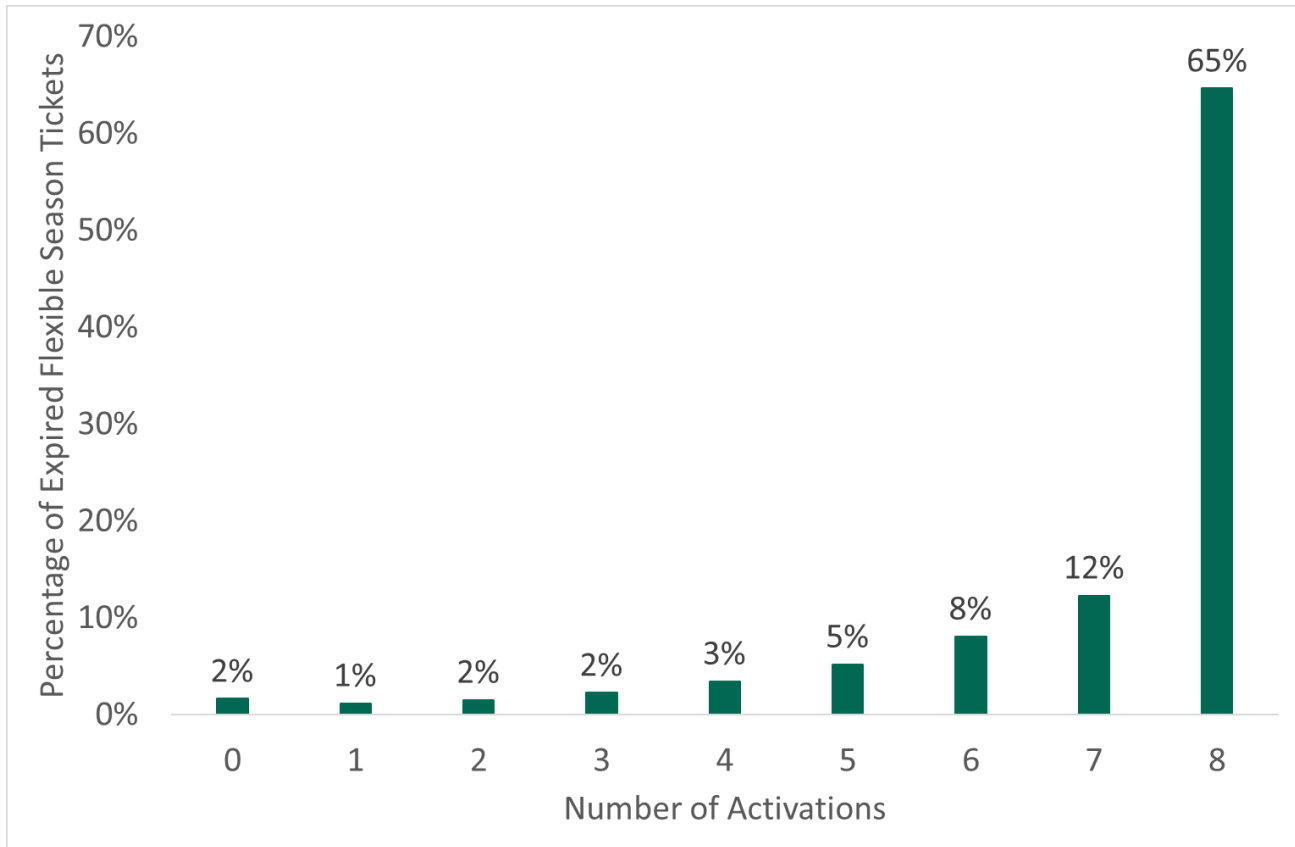


Figure 11: Number of Activations on Expired Flexible Season Ticket smartcards

The survey data provided a similar picture to that of the smartcard data in terms of total proportion of tickets where not all day passes were used. Forty one percent of respondents in Wave 2 and just under a third (32%) in Wave 1 reported they did not use, or were not expecting to use all the day passes on their Flexible Season Ticket.

However the distribution of number of days used amongst those who did not use all the day passes is different in the survey data. **Error! Reference source not found.**2 shows, for those not using all 8 days, the number of days which the Flexible Season Ticket was not used/expected to be used in Wave 2. On average, 2.2 day passes were not used/expected to be used.

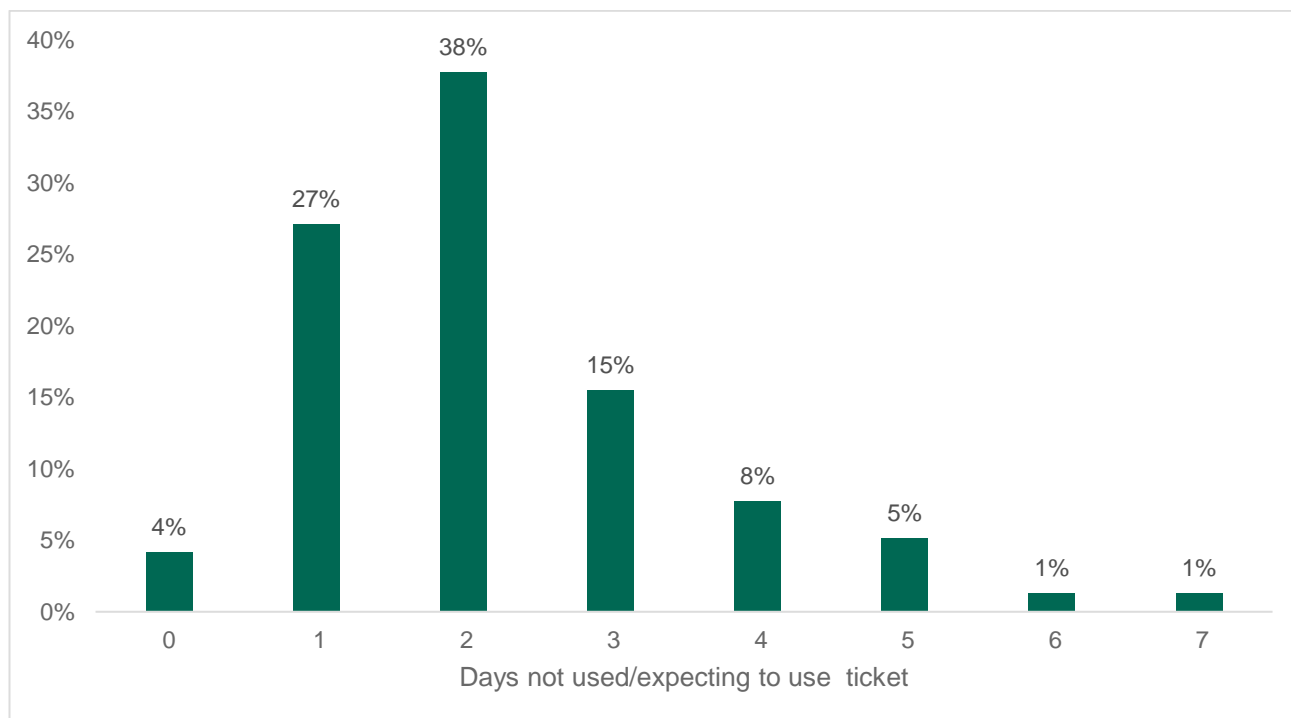


Figure 12: Including those you have already used, on your most recently purchased Flexible Season Ticket, how many of the 8 day passes do you NOT expect to use/were NOT used, (Flexible Season Ticket users who had not used all of their day passes, n (Wave 2)=310)

Several respondents in the in-depth interviews had not always used all eight days on their Flexible Season Ticket before the 28 day period finished, and in one case, a respondent noted not using the ticket at all due to lecture cancellations, meaning they no longer needed to travel by train that month. However, for most respondents, this did not discourage them from purchasing subsequent Flexible Season Tickets. In Section 4.3, we discuss in more detail how interviewees responded with regards to obtaining refunds for passes which they had not used within the 28 day period.

For some, this was not considered to be an issue, suggesting that they still felt as though the product provides good value for money if they use the majority of their tickets (e.g. six or seven journeys). However, one respondent suggested they have been discouraged from making future purchases because they had not used all their journeys.

“Day-to-day things can change. So kind of after this, this pass that I've got at the minute, I'm going to lose at least half of it. So I've kind of said to myself, well, actually when this one expires, I'm not going to buy them anymore, and I'm just going to do the daily ones, even though it costs a bit more, I think long term because there's still a lot of things happening outside of my control.”

By contrast some respondents suggested that when they know they are likely to have leftover passes, this incentivises them to travel for other purposes (e.g. for a leisure journey at the end of the month).

“If I buy it then I will use it even if I don't need it for work. I'll find a way to use it.”

Whilst some respondents tracked their usage of the product in the app, others kept track of their remaining journeys more manually:

- One respondent kept a mental note of how many journeys they had made;
- One kept a physical record, on paper or in Excel, of how many journeys had been used;
- One stated that they felt it was their own personal responsibility to track how many journeys they were making; and
- One kept track of their usage using their phone calendar.

“I have a calendar in my phone where I keep track of how many days I've used this particular month.”

Many respondents in the in-depth interviews had experienced a situation in which they had used all their eight passes before the 28 day period finished, and therefore required further tickets. This situation was handled in a range of different ways:

- Some purchased off-peak, super-off-peak or advance tickets when they were making limited additional journeys;
- Some had no hesitation in buying a further Flexible Season Ticket, as they travel very frequently by rail;
- One did not make any additional purchases, as they did not need to make any further journeys by rail during the timeframe; and
- One consciously limited their travel to ensure they did not surpass the eight day passes on the product.

Some in-depth interview respondents were not aware that more than one pass could be purchased within the 28-day period. Once informed of this, these interviewees found it useful to know that they had the option to purchase an additional pass within the 28-day period, should they require this in the future.

4.3 Use of refunds

The Flexible Season Ticket can be refunded, based on the difference between the price paid for the Flexible Season Ticket and the cost of an Anytime return ticket for each day used, minus an administration fee of no more than £10. This means that in the majority of cases, there would be no refund available if the Flexible Season Ticket only has one or two journeys unused.

Data from RDG shows that less than 1% of Flexible Season Tickets have been refunded, suggesting that a reasonable proportion of passengers (up to 15%) have purchased the Flexible Season Tickets, have used it less than six times, and so are entitled to a refund, but have not sought a refund.

Of the survey respondents who provided an opinion, 48% reported that ease of getting refunds for Flexible Season Tickets compares positively to other types of train tickets, 40% reported no difference and 12% said it compared negatively. The following section shows that other aspects of purchasing Flexible Season Tickets were more likely to be viewed positively when compared to other ticket types than getting a refund.

“Perhaps you could refund customers for any tickets not used or credit them the cost towards a subsequent Flexible Season Ticket. At present, I find I often have unused tickets that simply go to waste.”

“I bought it once and made a loss due to the high administration fee to refund the unneeded days (when I wasn’t needed in office), and haven’t bought since - you never know when you might not have to come in.”

There were mixed views from interview respondents as to whether there should be a refunds process for travellers who had not made use of all 8 of their passes in a 28-day period. Although some respondents stated they were happy for there not to be a refunds process at all, several felt this was a necessary service to be offered as part of providing the product. In addition, some respondents suggested the refunds process should be automatic, as they stated they did not have time to apply for a refund manually.

Of those interviewees who had previously applied for a refund, one suggested that this process was tedious, with several stages needing to be negotiated in order to receive their refund.

Some interviewees were not aware at all that there was currently a refunds process in place, and suggested they would have made use of it, had they been aware.

“It’s not an easy process and I almost felt a bit like for that reason you just don’t bother them. To be honest, I just got a bit fed up and thought I’ll leave it and I might have lost one ticket or two.”

“I didn’t know you could get a refund if you didn’t use all eight journeys. That’s interesting... It’s possible I missed it, but I don’t remember seeing that.”

4.4 Perception of product in comparison to other ticket types

In the survey, the vast majority (86%) of those who have used a Flexible Season Ticket agreed with the statement 'The Flexible Season Ticket has saved me money on my travel costs'. However, the proportion agreeing with this statement decreases for those that did not use all the day passes on their most recently purchased Flexible Season Ticket (71%).

Overall, respondents reported that their experience of purchasing Flexible Season Tickets compares positively to purchasing other types of ticket. A range of indicators was

provided and for each, more than half compared their experience positively in comparison to other ticket types, and less than 12% compared them negatively. In particular, ‘value for money’ was considered most positively, followed by ‘suiting travel needs’, ‘ease of use’ and ‘simplicity of calculating ticket cost’.

Those on higher incomes (66% for £28,001+) and without a disability (73%) were more likely to state that Flexible Season Tickets compare positively with other ticket options on value for money, than those on lower incomes (59% for up to £28,000) or with a disability that limited their day-to-day activities a lot (36%) or a little (48%).

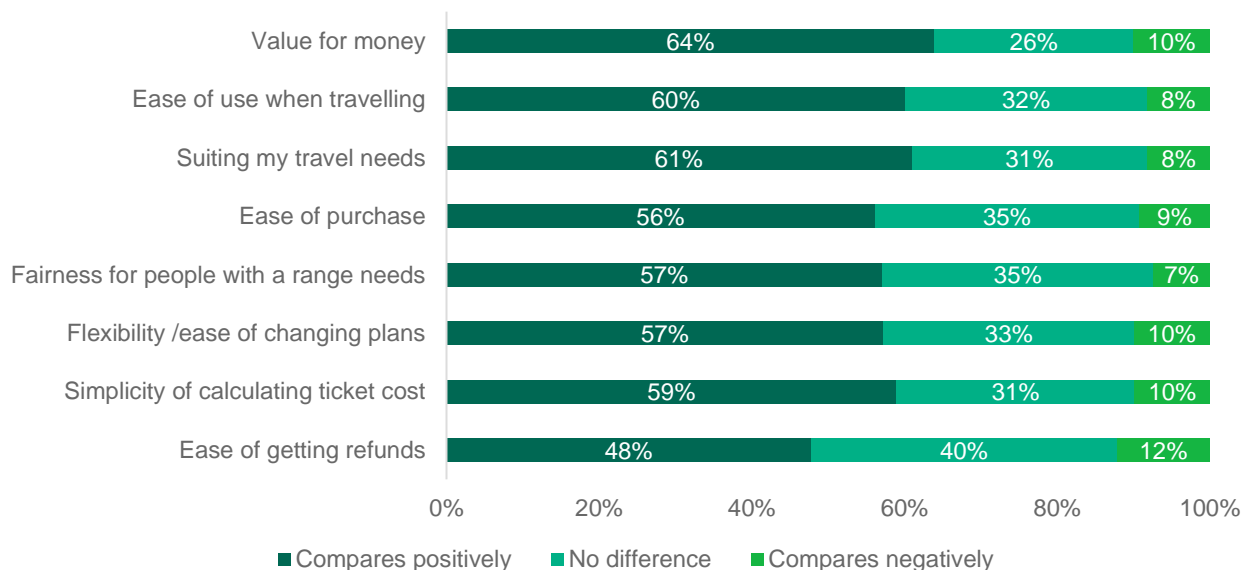


Figure 13: Compared with your experience purchasing other types of train tickets, do Flexible Season Tickets compare positively or negatively on the following features (people who responded don't know have been excluded) (Flexible Season Ticket users, n (Wave 2)=7685)

Feedback regarding the Flexible Season Ticket product was very positive amongst all those who took part in the in-depth interviews. The main aspects of the product which were viewed positively were:

- The price: many viewed the Flexible Season Ticket as being cheaper compared with other forms of ticket, such as purchasing the equivalent number of day returns for their journeys.
- Flexibility in date/time of travel: the ticket allows users to adapt their travel plans based on work demands, social plans and in the event of potential disruptions. In addition, the ticket can be used for ad-hoc journeys, not just journeys which have been planned in advance.
- Only needing one ticket: many liked the fact they did not have to purchase (or carry) multiple tickets for multiple journeys, and enjoyed having all their journeys linked to a single product. This saved them journeys to the ticket office, or from having to make multiple purchases.

“I like the system, and like what it offers. I’ve used it quite often and I don’t think for me there’s anything else better out there.”

“And you can customize it as well which helps quite a lot. Sometimes I don't need that ticket. I have the option within that month that four weeks window to use it when I need to do so.”

5. What is preventing higher take-up of the Flexible Season Ticket?

Key findings

Levels of awareness of Flexible Season Tickets amongst those who had not previously purchased one were low. Over half had not heard of the product at all, whilst about a quarter had heard of it but did not know how it works. Levels of awareness have not increased in the six months between the two waves of surveys, and awareness amongst female respondents and those on a household income of less than £28,000 remained low for both waves. Lack of awareness was the most frequently cited barrier to uptake of the Flexible Season Ticket. Levels of awareness have not changed in the six months between the two waves of surveys.

There also appeared to be a significant difference in uptake with a higher number of Flexible Season Ticket sales in London and the South East compared to elsewhere in England, through analysis of the ticket sales data.

A lack of certainty in rail travel patterns, reflected in a reduction of season ticket purchases overall, is likely contributing to the level of take-up of Flexible Season Tickets by non-users. An inability to predict travel patterns within the time period was cited as the second most important barrier to take-up of the Flexible Season Ticket, after lack of awareness.

Once presented with limited information on Flexible Season Tickets⁸ (and without providing the exact discount each respondent would achieve), perceived value for money amongst those who had not previously purchased one was considered high. Those who thought it offered good value for money indicated they were likely to purchase one in the future.

⁸ The information provided to respondents in the questionnaire was as follows:

The Flexible Season Ticket provides 8 days of travel in 28 days - any time between two named stations. The 8 days of travel do not need to be specified in advance. The Flexible Season Ticket offers savings for most commuters travelling during peak times, 2-3 days a week

The digital nature of the Flexible Season Ticket is only cited as a barrier by a very small minority of non-users (3%); however, the research was conducted online, meaning that this finding should be treated with caution.

There were many cited ways in which the product could be improved to encourage use; many of these focussed on increased flexibility, such as the ability to roll-over unused tickets, or freeze the product; and others focussed on increasing the discount available or providing an option for a refund for unused days or an off-peak version of the ticket.

An increase in the number of journeys, for example from eight to twelve, within the same 28 day time limit, would make Flexible Season Tickets more attractive to many, which is reflective of the commuting sample's prediction of twelve commuting days within a month, in a year's time. However, this may be related to a lack of understanding of multiple tickets being able to be purchased in a 28 day period.

5.1 A move away from season tickets

A lack of certainty in rail travel patterns, reflected in a reduction of season ticket purchases overall, is likely to be contributing to the level of take-up of Flexible Season Tickets.

Figure 14 shows rail journeys made between March 2019 and May 2022, split into those using season tickets and those using other tickets.

Journeys made by non-season tickets, in spring 2022, were almost at pre-pandemic levels, and the drop in total passenger numbers is almost entirely due to a reduction in season ticket journeys. This is likely to be in part due to people who previously purchased a season ticket now purchasing day tickets.

The data therefore shows that there was reduced demand for season tickets (typically purchased by commuters who travel 4-5 times a week) post-Covid and other types of tickets may now be of value to rail passengers.

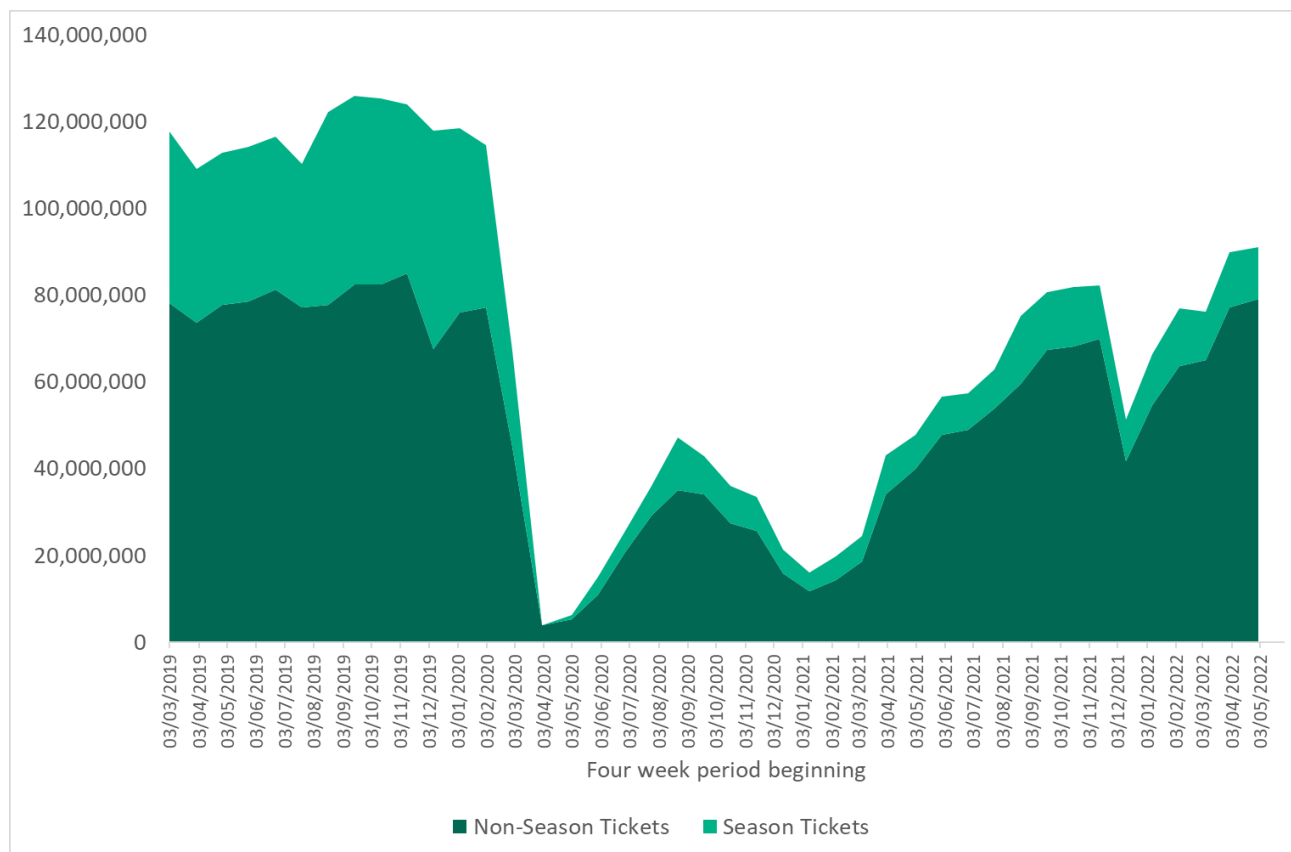


Figure 14: Rail Journeys using Season and Non-Season Tickets (LENNON data)

5.2 Awareness of Flexible Season Tickets

Levels of awareness of Flexible Season Tickets amongst survey respondents who had not previously purchased one (non-users) were low. Nearly three in five of non-users (58%) had not heard of the product at all, whilst about a quarter (23%) had heard of it but did not know how it works, 11% knew partially how it works and only 6% were fully aware of how it works. Awareness of the Flexible Season Ticket twelve months after it became available remained relatively unchanged from six months after it was launched. Knowledge of the product is therefore not significantly increasing over time.

The following groups of non-users were more likely to report they had not heard of the product at all:

- Almost two-thirds (64%) of those identifying as female, compared to half (53%) of those identifying as male;
- Around three-fifths (61%) of those on a household income up to £28,000, compared to 58% of those with household incomes of £28,001-£55,000, and 48% of those with household incomes over £55,000; and
- Two-thirds (66%) of those without the option to work from home at all, compared to lower proportions of those with a choice to work from home some of the time (46%) or all of the time (54%).

“I wish I had known about this ticket before. I will definitely investigate using it for my commute.”

“More information available at stations would help, I was mostly unaware of this option”

“If there were greater advertising on what the Flexible Season Tickets are, how to order one and how to use it, it would encourage greater usage of the tickets.”

“There needs to be far more advertising on radio and TV to raise public awareness of these tickets. I don’t recall hearing any such ads on the radio yet.”

All in-depth interviews were conducted with previous and current users of Flexible Season Tickets. Amongst both these groups, awareness of the product resulting from direct marketing or promotional activity was low. Instead, they reported that they first heard about the product through people they knew, or had found it by chance when they were looking at other train tickets or Railcard products on the internet. One respondent noted that they had discovered it by chance when searching for the cheapest way to travel on an online student forum.

5.3 Perceptions of value for money

Respondents in the in-depth interviews were asked about any cost considerations they had thought about prior to purchasing the Flexible Season Ticket. Most had calculated the cost savings they would make when purchasing the product. Methods used included (in order of prevalence amongst interviewees):

- Structured comparisons between the product and buying the equivalent number of individual day returns, looking at the percentage differences between the two options;
- ‘Mental calculations’ or rough mental arithmetic to estimate how much the product would save them; and
- Comparison of the product with a Monthly Season Ticket or discounted tickets used by the likes of students (e.g. 16-25 Railcard), and consideration of number of days likely to travel.

No interviewees made reference to the season ticket calculator on the National Rail Enquiries website as a method used to calculate the value for money of the product.

“I worked at how much it would cost me individually and how much it would cost me to do it as a season ticket. And it worked out cheaper to do it as a season ticket.”

“It is cheaper than if you are buying individual tickets for the days you are going to office. Now that we know how many days we have to go. So that was one of the driving factors for me to go ahead with this flexible ticket after doing that kind of calculation.”

By contrast, a small minority of interviewed respondents had not checked the price of the Flexible Season Ticket against other products, as they had assumed it would automatically be cheaper than other products.

A small minority of respondents also suggested that even though cost calculation was a key factor, the flexibility and the convenience of the product are key selling points which add to its intrinsic value.

“Even if the cost was fairly close, I thought that with the Flexi ticket you’ve got that flexibility of being able to use it for another day or other journeys... I’d rather pay a bit more, and have the flexibility of not having to worry about getting certain trains or if I have to go on a different day – it takes a bit of worry away.”

The importance of knowing that all eight journeys would be used varied greatly between respondents. Most felt that they needed to use at least six of their passes to feel like they would obtain good value for money, although some went a step further and stated that they would not purchase the product unless they were confident that they would use all eight passes.

Those who suggested they would need to be confident that they would use all eight passes before purchasing were highly motivated by obtaining a product that offers good value for money. This confidence that all eight journeys would be used provided these respondents with reassurance that they would be using the pass to its fullest extent.

By contrast, those who did not feel that they needed to be confident or certain that they would use all eight passes within 28 days suggested this was because:

- Their previous or typical travel patterns indicated that they are likely to use at least most of their passes;
- They were generally satisfied with the product as a whole; and
- For one in full-time employment working a mix of at-home and in-the office, their employer was covering the cost of their travel to training sessions, meaning the user was less closely scrutinising their value for money relative to their level of travel.

“[Not using all eight passes in a 28-day period] As long as it was something that didn't happen too frequently. It wouldn't upset me too much because I find using the system quite useful.”

“I don't really look that much because I know I'm generally going to use them anyway. So you know roughly going two days a week over the month.”

Perception of value for money was also explored in the survey amongst non-users of the Flexible Season Ticket. They were provided with the following information about the product in order that they could provide their views:

“The Flexible Season Ticket provides 8 days of travel in 28 days - any time between two named stations. The 8 days of travel do not need to be specified in advance. The Flexible Season Ticket offers savings for most commuters travelling during peak times, 2-3 days a week”.

The perception of the Flexible Season Ticket as good value for money amongst those who have not bought one, or compared the price of different tickets, was high. Figure 15 shows the survey results for Wave 2 and 1. From Wave 2, two thirds (66%) thought the ticket offered good value for money with only 7% having compared the price of different tickets and thinking it provided good value for money. A small proportion (8%) did not think the Flexible Season Tickets offered good value for money (with 3% having compared the price of different tickets) and about a quarter (26%) did not know. This finding reflects the fact that only a small proportion of respondents have looked into the cost of the Flexible Season Ticket.

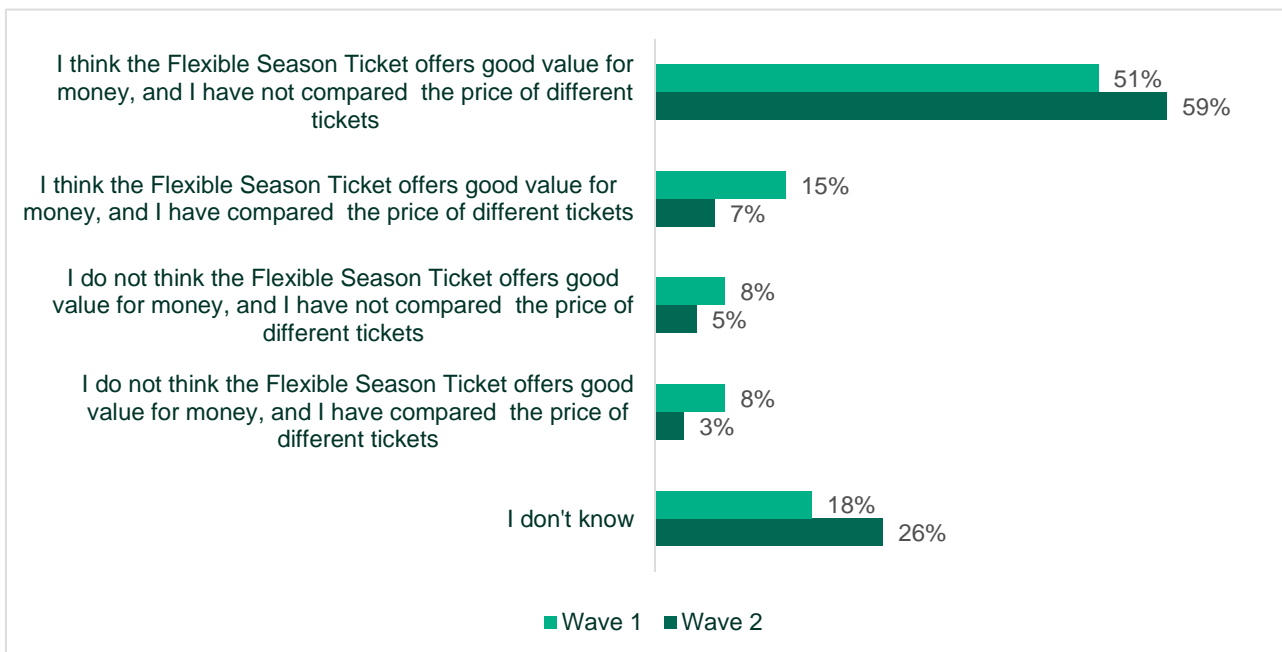


Figure 15: Based on what you have seen or heard, which of the following best reflects your views on whether the Flexible Season Ticket offers good value for money, or not? (Flexible Season Ticket non-users, n (Wave 2)=1,180, n (Wave 1)=1,204)

Those who consider Flexible Season Tickets to be good value for money were much more likely to predict purchasing one in the future (71%), compared to those who did not believe it to be good value for money (15%).

5.4 Reasons for not using a Flexible Season Ticket

The most common reasons for not using a Flexible Season Ticket other than lack of awareness were related to not wanting to commit to use of all the journeys, namely being unable to predict travel patterns (16%) or uncertainty about whether enough journeys would be made (18%).

Around one in ten respondents (10%) thought the cost of the ticket was too high. Of this group, around two in five mostly use Anytime tickets for that journey, two in five use off-peak tickets and a tenth use Advance tickets, with the remainder using a variety of different ticket types.

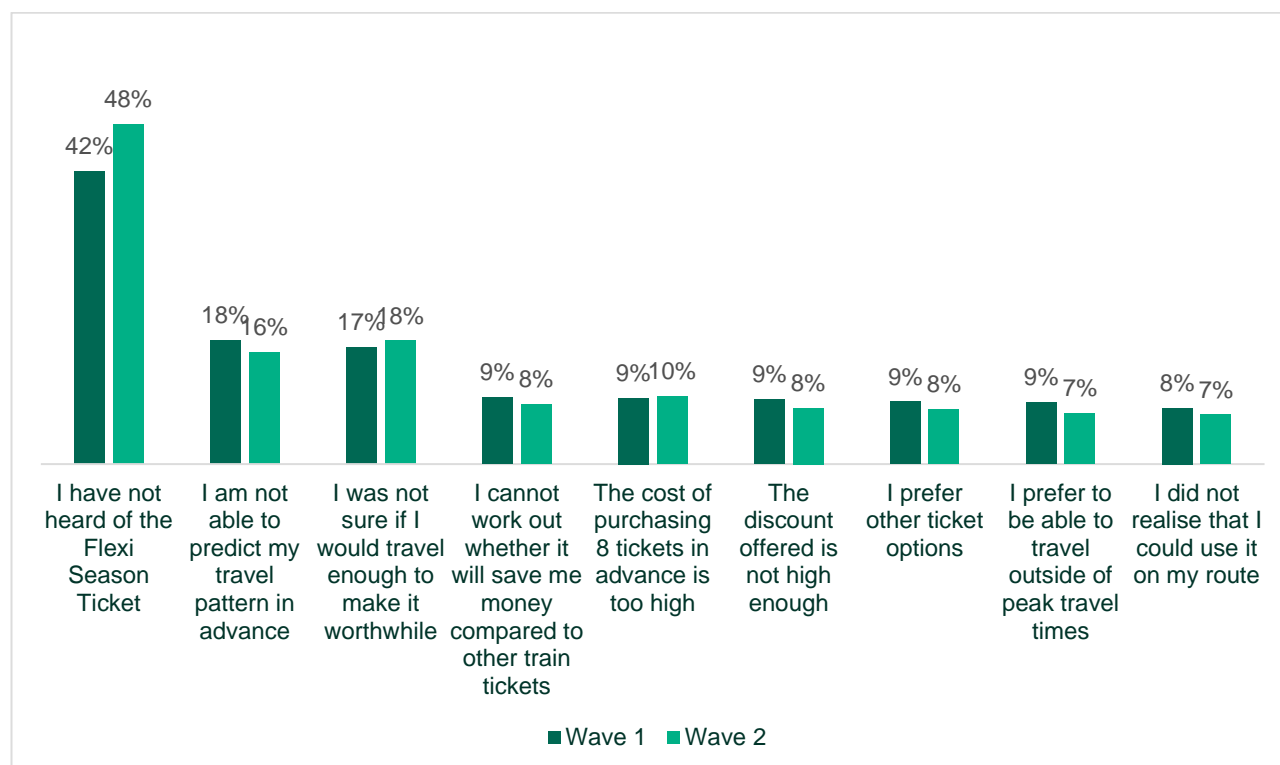


Figure 16: What are the reasons you did not use a Flexible Season Ticket for the journeys you have been making over the past month? (Flexible Season Ticket non-users, n (Wave 1)=1,204 and n (Wave 2)=1180)

Other barriers, each indicated by 5% or fewer were:

- I am nervous about using a digital ticket (4%);
- I was concerned about getting ill and not being able to make the journeys (3%);
- I do not have the correct smartcard/do not know how to get one (3%);
- It is too complicated to use (3%);
- I do not want/am unable to purchase a digital-only product (3%);
- My journeys involves multiple operators and I do not understand how that would work (4%);
- I have holiday booked (1%);
- There is not a single platform to purchase tickets from (1%);
- I sometimes prefer to travel First Class (2%); and
- I do not believe the smartcard/barcode ticket will work at the ticket gates (1%).

Table 8 summarises the demographic differences for each of the barriers to using a Flexible Season Ticket.

Table 8: Barriers to uptake by demographic characteristics

| BARRIER | DEMOGRAPHICS MORE LIKELY TO REPORT AS A BARRIER |
|--|--|
| I have not heard of the Flexible Season Ticket (48%) | Younger respondents (18-34) (53%) Female respondents (52%) Those with a household income between £28,001-£55,000 (52%) Students in full (53%) or part-time (60%) education Those without the option to work from home at all (56%) |
| I am not able to predict my travel pattern in advance (16%) | Older respondents (65+) (30%) Those with the option to work from home some of the time (19%) |
| I was not sure if I would travel enough to make it worthwhile (18%) | Older respondents (65+) (38%) Retired respondents (65+) (41%) Those with the option to work from home some of the time (18%) |
| The discount offered is not high enough (10%) | Those with the option to work from home some of the time (13%) |
| I cannot work out whether it will save me money compared to other train tickets (8%) | Older respondents (65+) (19%) Those living in the East (14%) and South (10%) |
| I prefer to be able to travel outside of peak travel times (8%) | Older respondents (65+) (24%) Retired respondents (23%) |
| I prefer other ticket options (7%) | Older respondents (65+) (14%) Those with the option to work from home some of the time (10%) |

5.5 Digital as a barrier

The majority of respondents who had not previously purchased a Flexible Season Ticket were unaware that it is a digital-only product (73%). Only a small minority (3%) cited not wanting or being able to purchase a digital-only product as a barrier to purchase. It should be noted that the research was conducted online and so there is a digital bias in respondents as they all have some digital awareness and access.

Of the 3% in each wave who did not want to, or were unable to purchase a digital product, preferring to use a paper ticket, reasons cited included:

- Not owning a smartcard;
- Not trusting / being nervous about using digital products;
- Not able to have the barcode ticket on an app; and
- Not wanting to get their phone out at ticket barriers.

“A physical paper ticket would be a nice addition as not everyone is particularly tech savvy”

“People like me without a smart phone are at a disadvantage as we are not able to make use of the discount”

“I use a pay as you go phone contract, so accessing data for even a few minutes (to purchase a ticket) automatically costs me £2, plus more cost for each time I need to turn my data back on to scan the ticket (on the train and at stations).”

Most respondents in the in-depth interviews used the Flexible Season Ticket on a mobile app for their journeys. However, a small minority suggested they still preferred using a physical smartcard or barcode ticket:

- Those who used a mobile app/smartphone preferred this option because they felt they were less likely to lose their ticket compared to a physical product;
- Those who used a physical ticket (non-digital), did so because they preferred to purchase their tickets at the counter, because a member of staff can advise them if they are getting the best deal.

With regards to purchasing the product, most respondents perceived the process as straightforward, with the online purchase channels seen as easy to navigate and self-explanatory. However, one respondent suggested they initially had to call their rail provider for assistance when making their first purchase, although they have not had any issues since using the app.

“Purchasing was pretty straightforward. You select the stations you’re going from and to, the date range of when you want the 28 days to last. It’s a fairly simple process.”

Likewise, using the product was overall seen as simple, although one respondent made reference to slight difficulties in using the product when they lose Wi-Fi signal.

5.6 Changes that would improve the offer/encourage use

At present, just over a third of those who had not previously purchased a Flexible Season Ticket (36%) thought it unlikely they would do so in the future and around one in seven (14%) did not know. The remainder of this section examines the factors that could encourage more take-up of the Flexible Season Ticket.

When prompted, the majority of all respondents (both users and non-users) (85%) suggested there were changes that could be made to the Flexible Season Ticket that would make them more likely to use them.

From the list of options provided in Wave 2⁹, the changes most frequently selected as ones that would make respondents more likely to use the Flexible Season Ticket were the

⁹ Three additional options were added to the survey in Wave 2

options for refund for unused days (32%), and ability to roll-over unused tickets to another time period (29%). Other changes are shown in Figure 17.

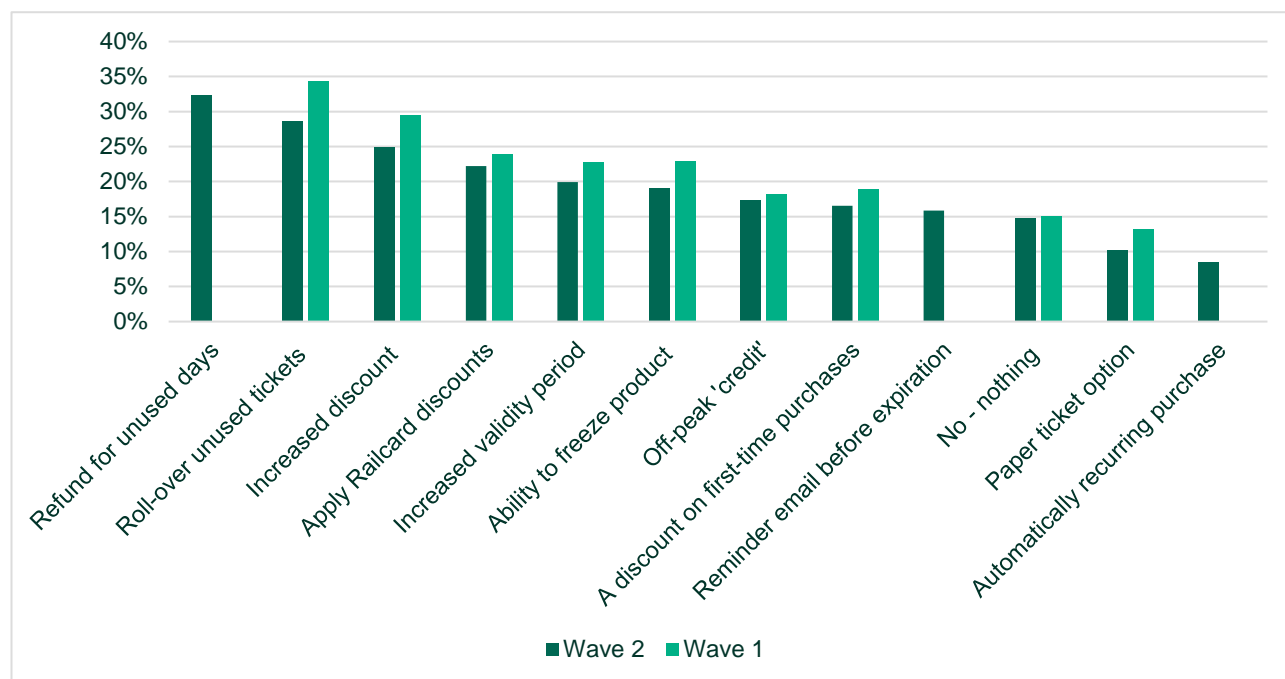


Figure 17: Are there any changes that could be made to the Flexible Season Ticket that would make you more likely to use them? (All respondents, n (Wave 1)=2,050 and n (Wave 2)=2,031)

The **single biggest influencing factor** chosen varied by age, income, disability and whether the respondent had previously purchased a Flexible Season Ticket or not. In summary¹⁰:

- Those aged 65+ (14%) were more likely to cite the ability to add Railcard discounts, than those in younger age brackets (10% for 18-24, 9% for 25-34, 4% for 35-44, 5% for 45-54, and 11% for 55-64 respectively);
- Flexible Season Ticket users were more likely to cite increasing the validity period of the tickets (10%), compared with non-users (4%);
- Respondents who had never purchased a Flexible Season Ticket were more likely to cite an increased discount compared to other products (14%), than Flexible Season Ticket users (8%).

All respondents were asked to indicate whether various changes to the Flexible Season Ticket product offer would make them more or less likely to use the product, with the question making clear that the cost of the Flexible Season Ticket would change to reflect

¹⁰ Note that the values presented in Figure 17 relate to a question where respondents were able to select multiple values, but the values presented in the bullet points relate to a question where respondents were asked to pick the biggest influences factor, and so the percentages in the bullet points are subsequently lower than those in the figure.

the change in any number of day passes. The findings are provided in Figure 18. The findings are consistent with those from Wave 1.

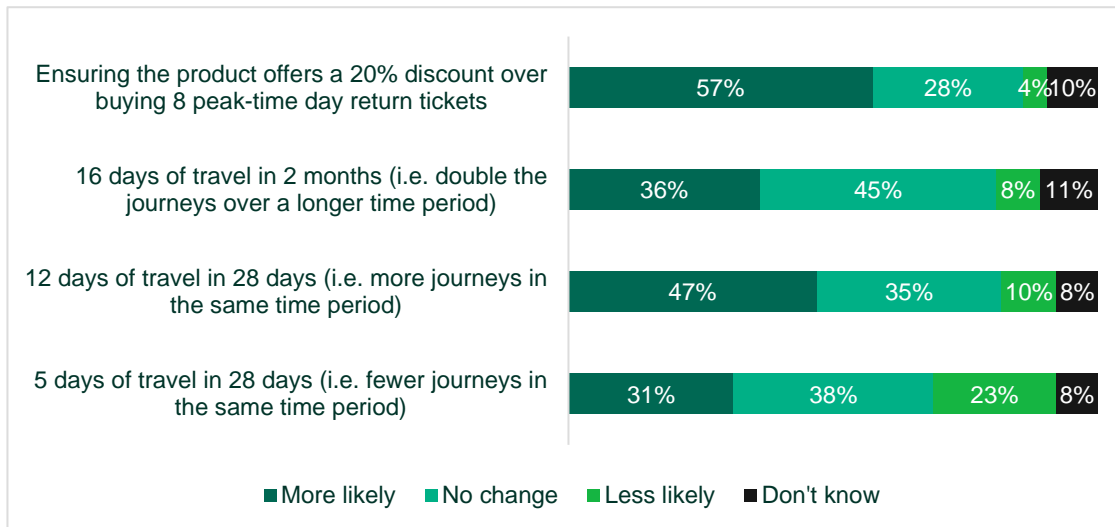


Figure 18: Would the following changes to the Flexible Season Ticket product offer make you more, or less likely to use them? (All respondents, n (Wave 2)=2,031)

The majority of all respondents (57%) indicated that ensuring a 20% discount over purchasing individual tickets (compared to the current discount level of around 12.5%) would make them more likely to use Flexible Season Tickets. Those living in the East and South were also more likely to suggest this (64% and 61%) than those living in the Midlands, North or London (53%, 56% and 56%).

Around half of respondents (47%) indicated that an increase in the number of journeys from eight to 12, within the same 28 day time limit, would make them more likely to use Flexible Season Tickets. This is reflective of the commuting sample’s prediction of twelve commuting days within a month, in a year’s time. The distribution of expected commuting patterns to the office in a year’s time is shown in Figure 19. Respondents who had previously purchased a Flexible Season Ticket were more likely to say they would be encouraged by this change (56% vs 41%); as were younger respondents aged 18-24 (54%) and those identifying as Black/ African/ Caribbean/ Black British (58%). This finding ties in with the in-depth interviews, where several respondents were unaware that you could purchase more than one Flexible Season Ticket in a month.

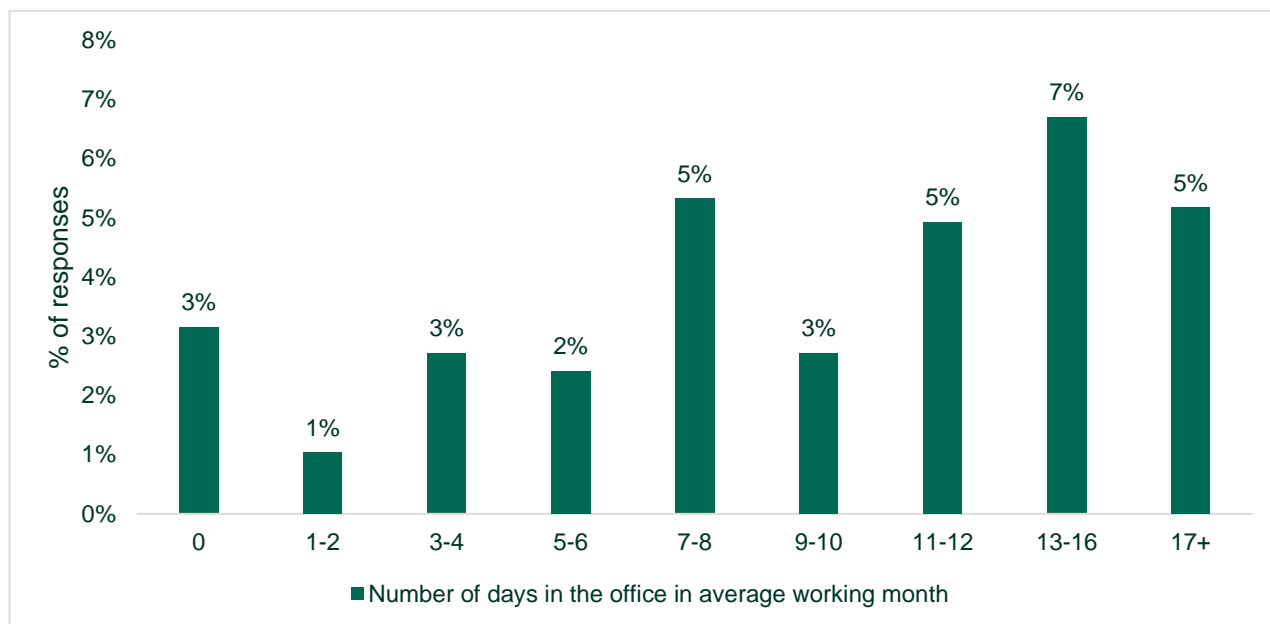


Figure 19: Where do you think you will spend your time working, in an average working month (in a year's time)? Responses to the Office option (People whose main purpose for undertaking most frequent journey is commuting, n (Wave 2)=693)

Conversely, reducing the number of day passes from 8 to 5, within the same time limit of 28 days, appeared to be the least attractive of the options presented, with 23% saying this would make them less likely to purchase Flexible Season Tickets, compared to only 31% considering that this would make them more likely to use a Flexible Season Ticket. This option was more attractive for those who had previously purchased a Flexible Season Ticket (38%), compared to those who had not (27%), and to East based respondents (51%), compared to other regions (between 28% and 31%).

Other suggestions raised by respondents were mostly related to additional flexibility as well, and included an off-peak version, having multiple versions with different number of tickets available within a 28 day period, and allowing Railcard discounts to be applied.

“Due to uncertainty about future working patterns the flexibility to roll over unused journeys would be the best improvement. The discount should also be greater as the price of my commute has increased significantly in recent years”

“An ability to roll over unused travel into a second 28-day period would be very helpful”

“I think it would be nice if they allowed buyers to use unused tickets any time they want without it expiring”

“It would be good if you were able to pick the number of days per month you would need, i.e. one person could choose 8 days where another could choose 12, etc.”

The in-depth interviews also explored factors perceived to improve the offering of the Flexible Season Ticket or encourage use.

Some respondents would like to see the number of passes increased, to enable a greater number of journeys to be made. None suggested these additional journeys should be free; rather that the product should be scaled up in terms of the total travel available, with the cost being raised proportionally. Specific suggestions made by single respondents were:

- That 12 passes in a 28 day period would be preferable;
- That 10 passes in a 28 day period would be preferable; and
- That a core product with 8 passes should be maintained, but with the option for the user to add one or two days to the ticket if the number of journeys looks like it may be exceeded.

“8 [passes] is ok. But if you’re going somewhere for a working week and going away for 5 days, could it be extended to 10?”

There were mixed views in the in-depth interviews as to whether the Flexible Season Ticket period should be over 28 days, or adjusted to a calendar month. Those who preferred for the timeframe to remain at 28 days felt this would ensure consistency between purchases, and avoid a layer of complexity to the product.

Many respondents, however, requested an option to ‘rollover’ unused passes onto their next Flexible Season Ticket, or to the next month. This option would prevent a situation for customers where journeys have been paid for, but are not used, for example if there are circumstances which limited their ability or need to travel over the period.

“I’ve been in close contact with [someone who] was positive for Covid, so I’ve not been able to travel to work. And then [there have been] the train strikes and kind of a lot of cancellations for the heat wave this week.”

A small minority of in-depth interview respondents suggested that enabling the Flexible Season Ticket to be used across multiple named stations (as opposed to two named stations only) would further enhance the flexible element of the product. At present, for people who may have to travel to different locations for work or leisure, the product does not currently cater to these needs.

Other suggestions of improving the product, each cited by one respondent, were:

- Offering a referral bonus for recommending the product to friends or colleagues;
- The ability to add multiple users to the same Flexible Season Ticket (i.e. allowing someone else to travel with them on the same journey, using one of their passes); and
- When purchasing the product, having a comparison tool or feature which shows the savings made by purchasing the Flexible Season Ticket relative to other options;
- Offering a discount to first-time users, or those who had not purchased a Flexible Season ticket recently; and
- Some kind of loyalty scheme for frequent purchasers.

“Maybe adding a couple more people on so, like if one time you want to go with a friend, maybe make it cheaper for your friend.”

“If it shows you how much you’re paying for the Flexible Season Ticket, and then gives you a comparison for how much you’d pay if you bought other variations of ticket... That may persuade people to buy them more then.”

6. Conclusions

6.1 In summary

This report provides the findings of an ex-post evaluation of the Flexible Season Ticket product, one year after it was launched.

The key objectives of the evaluation were to provide evidence on the implementation, outcomes and impacts of the Flexible Season Ticket product, during and after the first year of launch.

This report provides a Theory of Change for the product and the evaluation findings. The evaluation findings are based on two waves of a survey with rail users travelling 2-4 days per week developed for this evaluation (one after the product had been available for six months, and one after the product had been available for one year), in-depth interviews with Flexible Season Ticket users, and analysis of rail ticket sales data.

The Flexible Season Ticket appears to be meeting the current needs of many rail passengers travelling between two and four times a week, and is viewed positively amongst this cohort of rail passengers. Raising awareness of the product; raising awareness that more than one ticket can be purchased within a 28 day period; making refunds more easily accessible, and consideration of modifications to enable more flexible use, are all likely to encourage further uptake.

6.2 Is the Flexible Season Ticket supporting rail passenger needs?

Whilst the Flexible Season Ticket was designed in advance of the Covid-19 pandemic, with part-time workers and commuters in mind, the product clearly suits the needs of many current rail passengers, as demonstrated through the product's take-up. Users appear satisfied with the Flexible Season Ticket, as repeat purchases are the norm, and intentions to continue using the product, or newly purchase the product, are high.

Uptake amongst those who travel 2-4 times a week is highest among men, those with a household income above £28,000, those with commutes into London, and those with a health problem or disability. Higher levels of repeat purchase also correlate with these demographic characteristics. This implies that the Flexible Season Ticket meets the

needs of people with these characteristics better than those on lower incomes, female passengers and those without a health problem or disability.

Survey respondents are generally very supportive of the product, whether they use it or not, noting, in particular, that it provides a better option for part-time workers and meeting the needs of new commuting patterns. As travel patterns stabilise following the Covid-19 pandemic, the product structure for the Flexible Season Ticket may need to be adapted, or greater marketing put in place to encourage more purchases in a 28 day period, in order for the product to remain an attractive proposition to part time rail commuters.

6.3 Does the Flexible Season Ticket encourage rail travel?

Survey respondents believe that the Flexible Season Ticket encourages people to travel by train, rather than by other forms of transport, and this is particularly the case for those who have purchased the product. Some Flexible Season Ticket users note that they would have used alternative ways of travel to rail if the Flexible Season Ticket was not available.

In particular, the Flexible Season Ticket retains demand from male passengers, those on higher incomes and passengers with a disability – these were the groups most likely to predict a change in way of travelling if the Flexible Season Ticket did not exist.

The Flexible Season Ticket also appears to have generated additional rail trips based on self-reported survey responses, with an average of two additional return trips reported to have been made, as a result of owning the product.

6.4 What do Flexible Season Ticket users think of it?

Flexible Season Ticket users report very positive attitudes towards the product, with most believing it offers good value for money and comparing it favourably to other ticket types. In addition to value for money, it is perceived particularly favourably against other ticket types in terms of ease of use, suiting travel needs and ease of purchase.

A clear area for potential improvement is around refunds. About a third of Flexible Season Tickets are not fully used, and only a small fraction of these are refunded. Ease of accessing refunds was not considered as favourably when compared to other ticket types, assessed against other features of the product.

6.5 How could uptake of Flexible Season Tickets be increased?

A number of changes to the current product and its promotion may encourage higher uptake of Flexible Season Tickets. Awareness of the product amongst the sample of regular rail passengers was low, particularly amongst female passengers and those on lower incomes, and this is a key barrier to uptake. Raising the profile of Flexible Season Tickets is therefore likely to contribute to higher uptake.

The difficulty in predicting future travel patterns is also a significant barrier to Flexible Season Ticket purchase, and this is also reflected in the wider trend away from any type of season ticket.

Passengers would like to see more flexibility in the product, such as by obtaining refunds for unused tickets, rolling over unused passes, having an off-peak product or being able to freeze the product for a short period of time. Ensuring the product offers a higher discount may also result in higher uptake, as could increasing the number of day passes available from eight to twelve; these changes would have revenue implications.

Annex A: Methodology

Introduction

This chapter outlines the four broad tasks which were undertaken during this first stage of the evaluation of the Flexible Season Ticket Evaluation:

- The development of a Theory of Change;
- Primary Data Collection in December 2021 and June 2022;
- In-depth interviews with rail passengers who had purchased a Flexible Season Ticket; and
- Analysis of demand impacts using ticket sales data.

Theory of Change

Theory of Change is a comprehensive description of how and why a desired change is expected to happen in a particular context. It is based on:

- Knowledge of the context and circumstances;
- Knowledge of what has worked elsewhere in delivering this type of project; and
- The type of outcomes expected from the programme.

The development of a Theory of Change was the first phase of the ex-post evaluation on the Flexible Season Ticket product.

SYSTRA and the Tavistock Institute developed an initial version of the Theory of Change based on relevant policy and planning documents provided by the Department for Transport.

The initial version was further developed during and following two Theory of Change workshops, which were led by SYSTRA and the Tavistock Institute on 17th November 2021 and 22nd November 2021. In total 19 people contributed to the workshops, either attending in person or via Teams.

The structure of the workshop was as follows:

- An introduction to the workshop by the DfT Rail Evaluation Team;
- An introduction to Theory of Change alongside workshop objectives;

- A presentation of the draft Theory of Change, including some known outputs/impacts to discuss and build upon; and
- Capture and formalisation of views on the Theory of Change categories. The online Miro whiteboard tool was used to assist recording attendees' views.

The following Theory of Change categories were discussed in detail:

- **Context** – What is driving the introduction of the Flexible Season Ticket? (e.g. political, social, environmental)
- **Assumptions** – Who are the intended beneficiaries? What contextual, causal and behavioral factors need to be in place?
- **Impact** – What effect will it have? What difference will it make?
- **Outcomes** – What will the project deliver to which beneficiaries?
- **Delivery** – What would success look like, what does not being successful look like, and what changes could improve its success?
- **Risks** – What are the risks and barriers? How can they be managed?

Specific emphasis was given to participants views on how intended use of the product has changed due to the Covid-19 pandemic.

Following the workshop, the Theory of Change was refined, and a paper was produced containing the Theory of Change and the Narrative Theory of Change. It covers assumptions identified as underpinning the Theory of Change, the expected outputs of the Flexible Season Ticket product and the risks associated with its delivery. The Theory of Change and Narrative are provided in Annex B.

The Theory of Change was used to ensure that the research tools developed for the primary data collection addressed all potential benefits relevant to passengers.

Primary Data Collection

At the outset of the evaluation, consideration was given to undertaking a survey with Flexible Season Ticket holders only. However it was concluded that the following situations made it unviable to achieve a robust sample size:

- Very low incidence of this type of ticket amongst rail users at that time making achieving the required sample size through an online panel surveys unachievable;
- Restrictions resulting from Covid-19 on face to face surveys at stations;
- Travel restrictions as a result of the Covid-19 pandemic were still ongoing; and
- Inability to reach the target audience through their registration with train operating companies because of data protection issues.

SYSTRA and DfT therefore concluded that a representative sample of people who use rail 2-4 times per week, or anticipate doing so in the next six months, would provide a sample of people for whom Flexible Season Tickets are a realistic ticket choice.

An omnibus survey was undertaken in November 2021 with a nationally representative sample of 2000 people in England in each survey, in order to determine the age, gender, household income and region of those who travel by rail 2-4 times per week, or who anticipate doing so in the next six months. The findings were used to set quotas for the panel survey to ensure respondents were representative of people who travel by rail 2-4

times per week, or who anticipate doing so in the next six months, in terms of these demographics.

The survey questions were designed using the Theory of Change to ensure the appropriate benefits were measured. The questionnaires sought to understand:

- Reasons for use/non-use of Flexible Season Tickets and what did/might encourage use;
- The extent to which the product would/could support changed working and travel patterns as a result of Covid-19 and whether it has/has the potential to encourage both retention of demand that would have been lost without its introduction and additional demand;
- Awareness, perceptions and attractiveness of Flexible Season Tickets, and the extent to which it fulfils/could fulfil the pre-Covid objective of making commuter travel more affordable;
- Whether the digital-only product offer is/would be a barrier for uptake among non-users of Flexible Season Tickets; and
- Differences between different demographic groups and different types of ticket holders.

The surveys took place between 14th and 23rd December 2021 and between 1st and 15th June 2022. The questionnaires for both waves are provided in Annex C.

In-Depth Interviews with Flexible Season Ticket Holders

To provide greater context on how the Flexible Season Ticket was used and perceived by rail passengers, in-depth interviews were undertaken with 13 rail passengers who either currently own, or had previously used, a Flexible Season Ticket. The sample for these respondents was the second survey, in which rail passengers who had used a Flexible Season Ticket were asked if they would be willing to be contacted to attend an in-depth interview.

The discussion asked questions related to working patterns, use and views of the Flexible Season Ticket, their motivations for purchasing a Flexible Season Ticket, whether they had calculated the cost savings made, and whether they had any feedback on the product. The interviews lasted around 40 minutes, and participants were sent a £25 shopping voucher as a thank you for their time.

The discussion guide used is provided in Annex D.

Analysis of demand impacts of Flexible Season Tickets

To understand how the new product impacts on passenger demand, a quantitative assessment was undertaken drawing on ticket sales data.

Ticket sales data provides a record of every ticket sale that takes place on the rail network, and includes information on origin and destination, type of ticket and date. The information it provides allows an understanding of overall demand for the Flexible Season Ticket, and how sales of other ticket types have changed as the Flexible Season Ticket demand has grown.

The quantitative analysis used data from two sources:

- Rail Delivery Group data which provides information on sales on a daily basis, as well as further information from smartcard products on usage of each Flexible Season Ticket. Note data up to the 5th July 2022 has been included in this analysis; and
- Analysis of LENNON data, which provides a record of every ticket sale that takes place on the rail network, and includes information on origin and destination, type of ticket and date. The information it provides allows an understanding of overall demand for the Flexible Season Ticket, and how sales of other ticket types have changed as the Flexible Season Ticket demand has grown

Interpretation of findings

Reporting of the primary data represents a snapshot of attitudes and behaviours at the time of completing the surveys. The Flexible Season Ticket product had only been available for either six months or one year when the primary research for this report was conducted, and therefore these views have the potential to change over time.

Each survey had a total sample of 2,000 respondents, which would give a margin of error of +/- 2.2% for a 50% finding, with a 95% confidence level. This assumes a simple random probability sampling approach, which was not used in the design of this research; as such, these figures should be treated with caution. The margin of error would vary across the different subgroups and questions; some questions were asked to all respondents, and some were asked to a subgroup. Percentages and sample sizes for each question are reported throughout the report. Unless otherwise stated, only variations which are likely to be statistically significant (based on the above assumptions) are reported.

The primary research was undertaken through an online panel, and therefore these respondents are likely to be more comfortable using online devices than the wider population.

The in-depth interviews were undertaken with just 13 respondents, so do not provide a representative sample, but do provide additional context and insight into how the Flexible Season Ticket is used and perceived.

Annex B: Theory of Change

Introduction

The Theory of Change development represents the first phase in an ex-post evaluation on the Flexible Season Ticket product. The findings of the evaluation will feed into future policy development, for flexible products and/or wider fares and ticketing.

This annex sets out the Narrative Theory of Change derived from the two workshops and policy papers provided by the Department for Transport. It covers assumptions identified as underpinning the Theory of Change, the expected outputs of the Flexible Season Ticket product and the risks associated with its delivery.

The Narrative Theory of Change consists of primary and secondary theories. It simply provides a basic explanation of what appears in more detail in the tabular version of the Theory of Change.

The approach used to develop the Theory of Change is provided in Annex A.

The Narrative Theory of Change

Primary theory

Underpinning the introduction of the Flexible Season Ticket are two core elements. Firstly, recognition of the demand for, and the benefits of, flexible peak time commuting for people who commute regularly to a place of work but do not need, or wish, to do so five days a week. Secondly, since the Flexible Season Ticket proposition was first developed, the social, economic, and occupational impact of Covid has stimulated immense variety and flexibility in where, when, and for how long people work during the working week.

The primary theory shaping the Flexible Season Ticket is that if part time commuters, across the UK, purchase a set of eight tickets to their place of work, for use over 28 days, at peak times, they will experience a similar discount to 5 day-a-week commuters purchasing Monthly Season Tickets. Consequently, they would gain the benefit of being able to manage flexibly where and when they work. This in turn could bring quality of life benefits.

Secondary theories

The Theory of Change workshops generated two secondary theories.

- That the Flexible Season Ticket would improve the rail travel options and opportunities for people with the protected characteristics of gender, disability, pregnancy, and maternity. Before the pandemic these groups already represented a high proportion of the part time work force. The Flexible Season Ticket has expanded their flexible commuting options.
- That the Flexible Season Ticket could have the effect of reducing car travel because it creates additional peak time affordable rail travel.

The workshops did not identify any specific aspects of delivery that could lead to the realisation of these secondary theories, but they could feature in the evaluation.

Assumptions in Flexible Season Tickets

Theoretical assumptions

Whilst not explicit, many workshop participants were concerned with the subjective motivations for adopting the Flexible Season Ticket and the knowledge and capability of people to access the new type of season ticket. This is comparable with the '**COM-B**' (capability, opportunity, motivation – behaviour) theory of behaviour. For Flexible Season Tickets, commuters need to have the digital capability to use the tickets, the motivation to switch their season ticket to a Flexible Season Ticket, knowledge of its benefits, and the opportunity to use it. Only when **c**apability, **o**pportunity and **m**otivation are combined will **b**ehaviour change.

These assumptions were reflected in many of the workshop assumptions:

Capability assumptions

- People in general have sufficient digital skills, tools, and motivation to use online tickets.
- App interface, if complex, could impact negatively on older people, people with disabilities and people using English as a second language. Older people could require retail assistance.
- The National Rail Season Ticket Calculator allows customers to identify the benefits they will get from the Flexible Season Ticket.

Opportunity assumptions

- People are sufficiently aware of available products to make informed choices.
- People will do the research/be aware of the product and opt to purchase/commit (contrast with PAYG which has less friction).

Motivation assumptions

- People will want/need to travel often enough to justify investing in the product (8 journeys in a 28-day period).
- Flexible Season Ticket customers will want to travel in order to spend their eight journeys within 28 days to avoid losing money.

Some participants also appeared to lean on the **behavioural economics approach** – a subtler version of classical micro-economics, which also considers the non-economically-

rational nature of many human actions and decisions. On the one hand, Flexible Season Tickets are marginally cheaper for part time commuters and the cost saving will motivate commuters to change their product. This financial benefit would only be sufficient motivation when also offering better quality of life from returning to the office more often and by making Flexible Season Tickets the 'default option' for some who are most likely to benefit financially. For example, one assumption in group one stated: 'People will travel more if travel is less costly'. Without the product passengers could use other modes of transport or stay at home.

Contextual assumptions

The Theory of Change process showed the project delivery had to assume many things about the context they were delivering into, particularly about the customers it would be aimed at, travel patterns and the digital nature of the offer.

About Flexible Season Ticket customers

- Product will primarily be used by commuters at peak times.
- Most flexible commuters will travel consistently 2-3 days a week. The provision of 8 days travel over 28 days assumes people will want/need to travel often enough to justify buying the product.
- Post-Covid, commuters may have more choice and autonomy about travel to offices vs. working from home.
- This project will support Covid recovery by providing flexible commuters with a new option that provides savings when compared with travelling on Anytime tickets.
- There is a gap in season tickets (discounted peak travel) that meant that commuters travelling less than c. 3-4 days per week were not served.

About travel patterns

- Most people who plan to commute flexibly will be doing so 2-3 days a week.

About digital offer

- Customers will adapt to a new way of ticketing e.g. move to smart ticketing and activate tickets before travel, as required.
- Technical limitations mean a paper version is not possible across the network.
- Tickets can be provided by smart phone or smartcard. Most rail users will be internet users with basic digital skills.

Risks

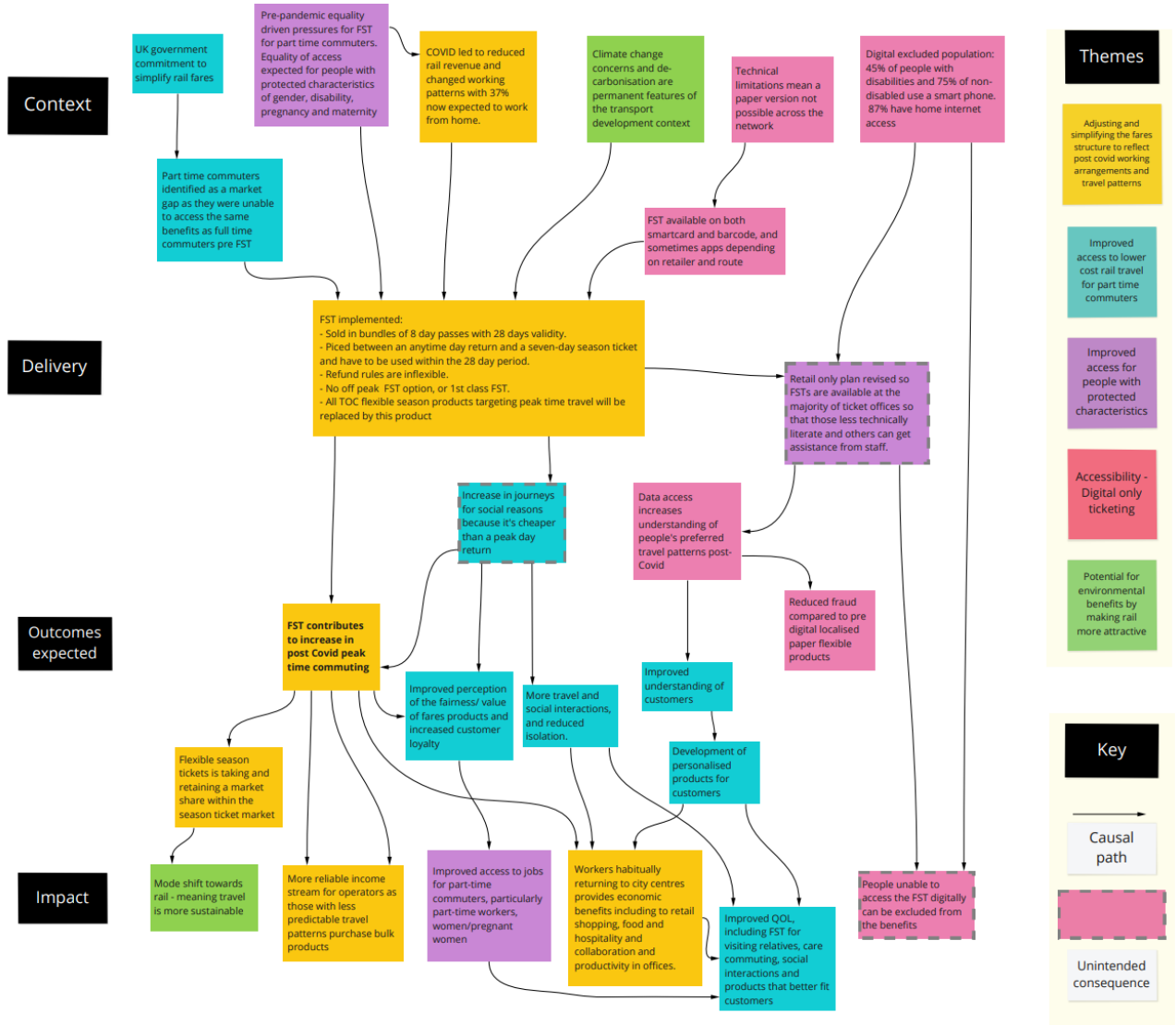
Risks likely to impact of the delivery of Flexible Season Ticket were identified in the Theory of Change workshops. In combination they offer a level of caution about the scope, flexibility, and simplicity of what is on offer:

- The 8 tickets over 28 days product might not fully reflect the emerging flexibility in working patterns. Lack of rollover option can leave new users feeling cheated and put off future

travel. The discount offered, when compared with monthly season tickets, is not large enough to be attractive.

- The product is not as attractive for longer-distance travellers (due to price cap). It is priced for peak travel so will be less attractive for non-commuters and is not relevant to commuters travelling off peak.
- The Flexible Season Ticket is still more expensive than working from home so might have insignificant impact on increasing demand.
- Railcard limitations mean that some passengers with protected characteristics do not use Flexible Season Tickets.
- Customers may be unable to identify the product as an attractive proposition within a complex fares system. Fare complexity has increased with the introduction of an additional product.
- People on lower incomes might not be able to pay upfront for a Flexible Season Ticket.
- The smart-only aspect of this product could impact on older people (protected characteristic of age) and people with a disability, and those who do not have English as their first language if the app interface is complex. Some people might consequently rely more heavily on station retail for assistance using digital-only products.
- The discount cap is there to protect revenue from season tickets, but season tickets may no longer be being sold/in demand.
- It is difficult to market nationally when the value proposition varies geographically.
- Trying to anticipate 'new normal' when still in state of flux. This current product might not be solving the right problem.

DfT Flexible Season Ticket evaluation – Final Report



Annex C: Survey Questionnaire

Please note the questionnaires included in this Annex are for information only and are no longer being used to collect data. Therefore text such as “By clicking “>>”, you agree to give your views” does not include a clickable button in this document.

WAVE 1 QUESTIONNAIRE

Privacy Notice

The Department for Transport (DfT) is carrying out this survey to gather evidence on flexible season tickets. This survey and the processing of personal data that it entails is necessary for the exercise of our functions as a government department. Where any special category data is being processed, condition (g) (reasons of substantial public interest) of article 9 will be relied upon.

For any information that allows you to be identified, DfT will, under data protection law, be the Controller for this information. SYSTRA have been contracted to analyse the responses to this survey. They are the Processor for this information. Yonder Data Solutions have been contracted by SYSTRA to collect responses to this survey. They are the sub-processor.

As part of this survey we'll ask about your age, gender, region, income band, work status, transport usage, origin and destination station, ethnicity, any caring responsibilities you may have, and about any disabilities you may have. At the end of the survey, you will be given the option to provide your consent to take part in further research on this subject. If you agree to be recontacted, researchers from SYSTRA may contact you within the next 12 months.

The data from this survey is being collected to help in the analysis of survey results. Recontacts will be used for follow-up research designed to improve policy development for rail to deliver a better service. You don't have to provide this information if you don't want to. Your participation in this study is entirely voluntary. The survey will be carried out according to the Market Research Society (MRS) Code of Conduct.

DfT's privacy policy has more information about your rights in relation to your personal data, how to complain and how to contact the Data Protection Officer. You can view it at <https://www.gov.uk/government/organisations/department-for-transport/about/personal-information-charter>.

To receive this information by telephone or post, contact us on 0300 330 3000 or write to Data Protection Officer, Department for Transport, 3rd Floor, One Priory Square, Hastings, TN34 1EA.

Your information will be kept securely by SYSTRA/Yonder Data Solutions and then transferred to DfT at the end of the fieldwork period. DfT will only receive pseudonymised data. Yonder Data Solutions/SYSTRA will only retain your data in a way that can identify you for as long as is necessary to support the research project and findings. In practice, this means that once SYSTRA have satisfactorily reported the pseudonymous research findings to DfT, both Yonder Data Solutions and SYSTRA will securely remove your personal, identifying data from their systems. For this project Yonder Data Solutions and SYSTRA will securely remove your personal data from their systems by December 2022.

Please contact SYSTRA's Data Protection Officer at UK_Compliance@systra.com should you wish to withdraw or amend any personal data submitted as part of this survey transferred to SYSTRA.

The survey will last no more than 10 minutes.

By clicking ">>", you agree to give your views. You can stop the survey at any time.

Scoping

| | |
|----|---|
| S1 | <p>Over the past 2 months or so, how frequently have you typically been travelling by train?</p> <p>Please exclude the time since the update on working from home guidance, effective from Monday 13th December 2021</p> |
| a | 5 or more days a week [screen out] |
| b | 2-4 days a week |
| c | Less than two days a week |
| d | Never |

| | |
|-----------|---|
| S2 | [If S1=c or d] Compared to the last 2 months or so, do you anticipate the amount you travel by train changing over the next 6 months? Please assume current restrictions on working from home will have lifted again |
| a | No – no change [screen out] |
| b | Yes – decreasing [screen out] |
| c | Yes – increasing to 2-4 days a week |
| d | Yes – increasing to 5 days or more a week [screen out] |

| | |
|-----------|---|
| S3 | Which of the following regions do you live in? |
| a | North East |
| b | North West |
| c | Yorkshire & Humberside |
| d | West Midlands |
| e | East Midlands |
| f | Eastern |
| g | London |
| h | South East |
| i | South West |

Ask if **S3=g**

| | |
|-----------|--|
| S4 | When travelling by train, does your usual train journey take place: [single select] |
| a | entirely within London Zones 1-9 [screen out] |
| b | entirely outside London Zones 1-9 |
| c | Both within and outside London Zones 1-9 |

Quotas

| | |
|-----------|--|
| S5 | With which gender do you most identify? [single select] |
| a | Female |
| b | Male |
| c | Prefer to self-describe as: [open end] |
| d | Prefer not to say |

| | |
|-----------|---|
| S6 | Please tell us your age. [open numeric text, screen out under 18s] |
| a | [open text] |

| | |
|-----------|---|
| S7 | What is your household income? If you are not sure, please provide your best estimate. [single select] |
| | Under £5,000 |
| a | £5,001-£14,000 |
| b | £14,001-£21,000 |
| c | £21,001-£28,000 |
| d | £28,001-£41,000 |
| e | £41,001-£55,000 |
| f | £55,001-£75,000 |
| g | £75,001-£100,000 |
| h | £100,001-£120,000 |
| i | £120,001 or more |
| j | Prefer not to say |

Typical Rail journey

| | |
|----|---|
| Q1 | <p>[If S1=b show] You've said that over the past 2 months or so, you have typically been travelling by train 2-4 days a week. Please think about the train journey you have made most frequently.</p> <p>[If S2=c show] You've said that you anticipate travelling by train 2-4 days a week within the next six months. Please think about the train journey you are going to be making most frequently.</p> <p>Which train stations does the outbound trip of your journey start and end at?</p> <p>For this, we mean only stations served by National Rail. Please exclude any travel on the underground, DLR or London overground services.</p> |
| a | Start station [open text] |
| b | End station [open text] |

| | |
|----|--|
| Q3 | <p>[If S1=b show] What is the main purpose of this journey?</p> <p>[If S2=c show] What will the main purpose of this journey be?</p> <p>[single-select]</p> |
| a | Commuting to/from work |
| b | Travel to school/college/university (including accompanying a child) |
| c | Travel for work-related business |
| d | Travel for personal business (e.g. appointments) |
| e | Visiting friends and/or relatives |
| f | Shopping trips |
| g | Leisure trips |
| h | Providing care or support for a vulnerable friend or relative |
| i | Other (please specify) |

| | |
|----|--|
| Q4 | <p>[If S1=b show] Which ticket type do you use most frequently for this journey?</p> <p>[If S2=c show] Which ticket type do you anticipate using most frequently for this journey?</p> <p>[single select]</p> |
| a | Anytime/Standard/Peak Single/Return |
| b | Off-Peak/Super Off-Peak Single/Return |
| c | Advance |
| d | Day Travelcard |
| e | Flexi Season Ticket |
| f | Weekly Season Ticket |
| g | Monthly Season Ticket |
| h | Annual Season Ticket |
| i | Special promotion ticket e.g. rover ticket |
| j | Other (please specify) |

| | |
|----|---|
| Q5 | <p>[If S1=b show] Do you use a Railcard discount for this journey?</p> <p>[If S2=c show] Will you use a Railcard discount for this journey?</p> |
| a | No |
| b | <p>Yes</p> <p>[dropdown</p> <p>Family & Friends Railcard</p> <p>Senior Railcard</p> <p>16-25 Railcard</p> <p>26-30 Railcard</p> <p>Two Together Railcard</p> <p>Network Railcard</p> <p>Disabled Person's Railcard</p> <p>Other Railcard]</p> |

Future of the commute

Ask section if Q3=a

| | |
|----|--|
| Q6 | <p>Thinking ahead to a year from now, and assuming there are no Covid-related restrictions that affect you and that you stay in the same/similar role, approximately how many days <u>each week</u> are you expecting to work?</p> <p>Please round to the nearest day.</p> |
| a | [open text, allow numbers between 1-7] |
| b | I will no longer be working [single-select, go to Flexi Season Ticket Holders] |

| | | |
|----|--|--------------------------|
| Q7 | <p>Where do you think you will spend your time working, in an average working month (approx. [Q6 x4] days, based on your answer to the earlier question)?</p> <p>Please enter '0' if you will not work in any of the following locations.</p> <p>If you are not sure, please provide your best estimate.</p> | |
| a | Office | _____ days |
| b | Home | _____ days |
| c | Other defined workplace (e.g. construction site, hospital, educational facility, health facility, retail, agricultural, workshop/manufacturing) | _____ days |
| d | No fixed location (e.g. driver) | _____ days |
| f | Total: | [data check = Q x4] days |

| Q8 | Still thinking ahead to a year from now, how frequently do you expect to be able to: [single select per row] | | | | | | |
|----|---|--------|------------|-----------|--------|-------|------------|
| | | Always | Very often | Sometimes | Rarely | Never | Don't know |
| a | Work from home when you choose to do so | | | | | | |
| b | Commute to or from your place of work during 'off-peak hours' in the morning (i.e. outside 7am to 10am) | | | | | | |
| c | Commute to or from your place of work during 'off-peak hours' in the afternoon/evening (i.e. outside 4pm to 7pm) | | | | | | |

Flexible Season Ticket holders

| Q9 | One Flexi Season Ticket provides 8 days of travel in 28 days, any time between two named stations. [If S1=b show] How many Flexi Season Tickets have you purchased? [If S2=c show] If you have previously purchased a Flexi Season Ticket, how many of these have you purchased? |
|----|---|
| a | [Do not show if Q4=e] 0 – I have not bought one [go to 'Barriers to Use'] |
| b | 1 |
| c | 2 |
| d | 3 |
| e | 4 |
| f | 5 |
| g | 6 |
| h | 7 |
| i | 8+ |
| j | Don't know [go to 'Barriers to Use'] |

| | |
|------------|--|
| Q10 | Have you purchased Flexi Season Ticket(s) using a Smartcard, or barcode ticket? [single-select] |
| a | Smartcard |
| b | Barcode |
| c | [If Q9=b do not show option] Both |
| d | Don't know |

| | |
|------------|--|
| Q11 | Thinking about your most recently purchased Flexi Season Ticket, is this still valid? |
| a | Yes – but I am not expecting to use up all the day passes on it |
| b | Yes – and I am expecting to use up all the day passes on it |
| c | No – it has expired and I did not use all the day passes on it |
| d | No – it has expired and I used up all the day passes on it |
| e | Don't know |

Ask if **Q11=a** or **c**

| | |
|------------|--|
| Q12 | [If Q11=a show] Including those you have already used, on how many days do you expect to use this ticket? [If Q11=c show] On how many days did you use this ticket? |
| a | [open text, allow numbers between 0 and 7] |

| | |
|-----|--|
| Q13 | <p>[If Q11=a or b show] Thinking about the train journeys you are making this month, do you think that having a Flexi Season Ticket has encouraged you to travel by train more?</p> <p>If so, how many extra train journeys are you expecting to make, compared to if Flexi Season Tickets were not available?</p> <p>[If Q11=c or d show] Thinking about the train journeys you have made on your most recent Flexible Season Ticket, do you think that having a Flexible Season Ticket encouraged you to travel by train more?</p> <p>If so, how many extra train journeys did you make, compared to if Flexi Season Tickets were not available?</p> <p>[show both] If you are not sure, please provide your best estimate.</p> |
| a | <p>[drop down:</p> <p>No – having a Flexible Season Ticket has not encouraged me to travel by train more</p> <p>Yes – 1 extra return journey</p> <p>Yes – 2 extra return journeys</p> <p>Yes – 3 extra return journeys</p> <p>Yes – 4 extra return journeys</p> <p>Yes – 5 extra return journeys</p> <p>Yes – 6 extra return journeys</p> <p>Yes – 7 extra return journeys</p> <p>Yes – 8 extra return journeys</p> <p>Don't know]</p> |

| | |
|------|---|
| Q13a | <p>To what extent do you agree or disagree with the following statement?</p> <p>The Flexi Season Ticket has saved me money on my travel costs</p> <p>[single select]</p> |
| a | Strongly agree |
| b | Agree |
| c | Neither agree nor disagree |
| d | Disagree |
| e | Strongly disagree |
| f | Don't know |

| | |
|-------------------|---|
| <p>Q14</p> | <p>[If S1=b show] Will you use any other train tickets for your most regular journey, in addition to your Flexi Season Ticket, during its validity period?</p> <p>[If S2=c show] Do you think you will use any other train tickets for your most regular journey, in addition to your Flexi Season Ticket, during its validity period?</p> <p>Please select all that apply.</p> <p>[multi-select]</p> |
| <p>a</p> | <p>No [single select]</p> |
| <p>b</p> | <p>Anytime/Standard/Peak Single/Return</p> |
| <p>c</p> | <p>Off-Peak/Super Off-Peak Single/Return</p> |
| <p>d</p> | <p>Advance</p> |
| <p>e</p> | <p>Day Travelcard</p> |
| <p>f</p> | <p>Oyster Pay As You Go</p> |
| <p>g</p> | <p>Weekly Season Ticket</p> |
| <p>h</p> | <p>Monthly Season Ticket</p> |
| <p>i</p> | <p>Annual Season Ticket</p> |
| <p>j</p> | <p>Special promotion ticket e.g. rover ticket</p> |
| <p>k</p> | <p>Other (please specify)</p> |

| | |
|-------------------|--|
| <p>Q15</p> | <p>If the Flexi Season Ticket was not available what would you be <u>most</u> likely to do?</p> <p>[If S1=b show] Please think about the journey you are most frequently making.</p> <p>[If S2=c show] Please think about the journey you are going to be making most frequently.</p> |
| <p>a</p> | <p>Change the time of day to travel off-peak</p> |
| <p>b</p> | <p>Not make the journey at all</p> |
| <p>c</p> | <p>Make the journey by another way of travelling</p> |
| <p>d</p> | <p>Make the journey by train, but less frequently</p> |
| <p>e</p> | <p>Make the journey by train, but more frequently</p> |
| <p>f</p> | <p>There would be no change to the way I travel</p> |
| <p>g</p> | <p>Other (please specify)</p> |
| <p>h</p> | <p>Don't know</p> |

Ask if Q15=b or c

| | |
|--------------------------|---|
| Q16 | If the Flexi Season Ticket was not available, what train ticket would you be <u>most likely</u> to purchase? |
| | [If S1=b show] Please think about the journey you are most frequently making. |
| | [If S2=c show] Please think about the journey you are going to be making most frequently. |
| | a Anytime/Standard/Peak Single/Return |
| | b Off-Peak/Super Off-Peak Single/Return |
| | c Advance |
| | d Day Travelcard |
| | e Weekly Season Ticket |
| | g Monthly Season Ticket |
| | f Annual Season Ticket |
| | g Special promotion ticket e.g. rover ticket |
| j Other (please specify) | |
| h Don't know | |

| | | | | | |
|-----|---|--|---------------|---------------------|------------|
| Q17 | Compared with your experience purchasing other types of train tickets, do Flexi Season Tickets compare positively or negatively on the following features: | | | | |
| | | Compares negatively | No difference | Compares positively | Don't know |
| | a | Ease of purchase | | | |
| | b | Ease of use when travelling | | | |
| | c | Flexibility /ease of changing plans | | | |
| | d | Ease of getting refunds | | | |
| | e | Simplicity of calculating ticket cost | | | |
| | f | Value for money | | | |
| | g | Suiting my travel needs | | | |
| | h | Fairness for people with a range of different travel needs | | | |

| | |
|--------------|---|
| Q18 | [If S1=b show] Are you intending to purchase another Flexi Season Ticket once your current ticket expires/all the journeys are used? |
| | [If S2=c show] Do you think you will purchase another Flexi Season Ticket when the Flexible Season Ticket you purchase in the future expires/you use all the journeys? |
| | a Yes – immediately |
| | b Yes – within a month |
| | c Yes – further into the future |
| | d No |
| e Don't know | |

Ask if Q=d or e

| | |
|---|--|
| Q20 | [If Q=d show] Why do you say that? [If Q=e show] Why are you not sure? Please select all that apply. [multi-select] |
| | a I will be travelling by train more, so will purchase a different ticket type |
| | b I will be travelling by train less, so will purchase a different ticket type |
| | c I will not be able to predict my train travel over the 28 day period |
| | d I will wait before purchasing another Flexi Season Ticket as I will be taking holiday |
| | e I am not sure it saves me money compared to other train tickets |
| | f The cost of purchasing 8 tickets in advance is too high |
| | g The discount offered is not high enough |
| | h The smartcard/barcode ticket did not (always) work at the ticket gates |
| | i It is too complicated to use |
| | j I am not able to predict my travel pattern in advance |
| | k It is too complicated to purchase |
| | l I did not use up all the journeys on my last Flexi Season Ticket |
| | m I am concerned about getting ill and not being able to make the journeys |
| n I sometime prefer to travel First Class | |
| o Other (please specify) | |

[Go to Q17]

Barriers to use

[Show if Q4≠e or if Q9=a] The Flexi Season Ticket provides 8 days of travel in 28 days - any time between two named stations.

The 8 days of travel do not need to be specified in advance. The Flexi Season ticket offers savings for most commuters travelling during peak times, 2-3 days a week.

| | |
|------------|---|
| Q21 | Had you heard of the Flexi Season Ticket before reading this information? [single-select] |
| a | I had not heard of the Flexi Season Ticket at all |
| b | I had heard of the Flexi Season Ticket but was not aware of how it works |
| c | I had heard of the Flexi Season Ticket and was partially aware of how it works |
| d | I had heard of the Flexi Season Ticket and was aware how it works |
| e | Don't know |

Flexi Season tickets are available as either a Smartcard or Barcode ticket, depending on the train operator/retailer. They are a digital only product i.e. it is not possible to purchase a paper Flexi Season Ticket.

If you have a Smartcard, you can buy your Flexi Season ticket online and add it to your Smartcard when you get to the station. Or you can buy a Smartcard to use for the Flexi Season Ticket.

You can buy a Flexi Season ticket as a Barcode ticket (where available) online or app. This will either be emailed, or it will be delivered to your app and stored there.

| | |
|------------|---|
| Q22 | [Ask if Q21=b, c, d] Were you aware or not aware that Flexi Season Tickets are digital-only products before reading that information? [single-select] |
| a | Yes – I was aware |
| b | No – I was not aware |
| c | Don't know |

| | |
|-------------------|--|
| <p>Q23</p> | <p>Based on what you have seen or heard, which of the following best reflects your views on whether the Flexi Season Ticket offers good value for money, or not?</p> <p>[single-select, randomise order]</p> |
| <p>a</p> | <p>I <u>do not</u> think the Flexi Season Ticket offers good value for money, and I <u>have compared</u> the price of different tickets</p> |
| <p>b</p> | <p>I <u>do not</u> think the Flexi Season Ticket offers good value for money, and I <u>have not compared</u> the price of different tickets</p> |
| <p>c</p> | <p>I <u>think</u> the Flexi Season Ticket offers good value for money, and I <u>have compared</u> the price of different tickets</p> |
| <p>d</p> | <p>I <u>think</u> the Flexi Season Ticket offers good value for money, and I <u>have not compared</u> the price of different tickets</p> |
| <p>e</p> | <p>I don't know</p> |

Ask if Q4≠e

| | |
|-----|---|
| Q25 | <p>[If S1=b show] What are the reasons you did not use a Flexi Season Ticket for the journeys you have been making over the past month or so, prior to the update on working from home guidance from Monday 13th December 2021? Please select all that apply.</p> <p>[If S2=c show] What are the reasons you are not planning on using a Flexi Season Ticket for journeys in the future?</p> <p>[multi-select, randomise except a]</p> |
| a | I have not heard of the Flexi Season Ticket [single select] |
| b | I cannot work out whether it will save me money compared to other train tickets |
| c | I did not realise that I could use it on my route |
| d | I was not sure if I would travel enough to make it worthwhile |
| e | The cost of purchasing 8 tickets in advance is too high |
| f | I do not have the correct smartcard/do not know how to get one |
| g | The discount offered is not high enough |
| h | I do not believe the smartcard/barcode ticket will work at the ticket gates |
| i | I do not want/am unable to purchase a digital-only product |
| j | I prefer other ticket options |
| k | It is too complicated to use |
| l | I am not able to predict my travel pattern in advance |
| m | My journeys involves multiple operators and I do not understand how that would work |
| n | There is not a single platform to purchase tickets from |
| o | I have holiday booked |
| p | I was concerned about getting ill and not being able to make the journeys |
| q | I sometimes prefer to travel First Class |
| r | I prefer to be able to travel outside of peak travel times |
| S | I am nervous about using a digital ticket |
| t | Other (please specify) |

Ask if Q25>1

| | |
|--------------------|--|
| <p>Q25b</p> | <p>[If S1=b show] Of the reasons you selected, which has the biggest influence on why you did not use a Flexi Season Ticket for the journeys you have been making over the past month?</p> <p>[If S2=c show] Of the reasons you selected, which has the biggest influence on why you are not planning on using a Flexi Season Ticket for journeys in the future?</p> <p>[single-select, only show options selected above]</p> |
| <p>a</p> | <p>I cannot work out whether it will save me money compared to other train tickets</p> |
| <p>b</p> | <p>I did not realise that I could use it on my route</p> |
| <p>c</p> | <p>I was not sure if I would travel enough to make it worthwhile</p> |
| <p>d</p> | <p>The cost of purchasing 8 tickets in advance is too high</p> |
| <p>e</p> | <p>I do not have the correct smartcard/do not know how to get one</p> |
| <p>f</p> | <p>The discount offered is not high enough</p> |
| <p>g</p> | <p>I do not believe the smartcard/barcode ticket will work at the ticket gates</p> |
| <p>h</p> | <p>I do not want/am unable to purchase a digital-only product</p> |
| <p>i</p> | <p>I prefer other ticket options</p> |
| <p>j</p> | <p>It is too complicated to use</p> |
| <p>k</p> | <p>I am not able to predict the flexibility I will be able to take in advance</p> |
| <p>l</p> | <p>My journeys involves multiple operators and I do not understand how that would work</p> |
| <p>m</p> | <p>There is not a single platform to purchase tickets from</p> |
| <p>n</p> | <p>I have holiday booked</p> |
| <p>o</p> | <p>I was concerned about getting ill and not being able to make the journeys</p> |
| <p>p</p> | <p>I sometime prefer to travel First Class</p> |
| <p>q</p> | <p>I prefer to be able to travel outside of peak travel times</p> |
| <p>r</p> | <p>Other (please specify)</p> |

Ask if Q25=h

| | |
|------------|---|
| Q26 | Why is the Flexi Season Ticket only being available as a digital product a reason why you would not use it? Please select all that apply. [multi-select] |
| a | I do not have a Smartcard |
| b | I do not want to get a Smartcard |
| d | I do not have a way of having the barcode ticket on an app |
| e | I prefer using paper tickets |
| f | I don't trust digital products |
| g | I don't think it will work at the ticket gate barriers |
| h | I don't want to make the purchase online |
| i | I don't want to get my phone out at the ticket gate barriers |
| j | I am unable to make a purchase online |
| k | I don't understand digital products |
| L | I am nervous about using a digital ticket |
| m | Other (please specify) |

| | |
|------------|--|
| Q27 | Overall, how likely, or unlikely is it that you would use a Flexi Season Ticket in the next year or so? [single-select] |
| a | Very likely |
| b | Quite likely |
| c | Quite unlikely |
| d | Very unlikely |
| e | Don't know |

| | |
|------------|---|
| Q17 | Are there any changes that could be made to the Flexi Season Ticket that would make you more likely to use them? [multi-select] |
| a | No – nothing would make me more likely to use them [single select, Go to Q28] |
| b | Being able to purchase a paper ticket |
| c | Ability to roll-over unused tickets to another time period |
| d | Increased discount compared to other tickets |
| e | Increased validity period (for example, allowing a full month rather than 28 days to use the 8 journeys) |
| f | A 'credit' provided if a journey is made off-peak |
| g | Ability to apply Railcard discounts |
| h | Ability to freeze the product for a short period |
| i | A discount on first-time purchases of Flexi Season Tickets |
| j | Other (please specify) |
| k | Don't know |

Ask if Q17>1

| | |
|-------------|---|
| Q17b | Of the changes you selected, which would have the single biggest influence in making you more likely to use them? [single-select, only show options selected above] |
| a | No – nothing would make me more likely to use them [single select] |
| b | Being able to purchase a paper ticket |
| c | Ability to roll-over unused tickets to another time period |
| d | Increased discount compared to other tickets |
| e | Increased validity period (for example, allowing a full month rather than 28 days to use the 8 journeys) |
| f | A 'credit' provided if a journey is made off-peak |
| g | Ability to apply Railcard discounts |
| h | Ability to freeze the product for a short period |
| i | A discount on first-time purchases of Flexi Season Tickets |
| j | Other (please specify) |
| k | Don't know |

| | | | | | |
|-----|--|-------------|-----------|-------------|------------|
| Q28 | <p>As a reminder, the Flexi Season Ticket currently provides 8 days of travel in 28 days. It is intended to provide a discount for those travelling 2-3 days per week at peak times. For the majority of passengers this discount is around the level of 12.5%.</p> <p>Would the following changes to the Flexi Season Ticket product offer make you more, or less likely to use them?</p> | | | | |
| | | Less likely | No change | More likely | Don't know |
| a | 5 days of travel in 28 days (i.e. fewer journeys in the same time period) | | | | |
| b | 12 days of travel in 28 days (i.e. more journeys in the same time period) | | | | |
| c | 16 days of travel in 2 months (i.e. double the journeys over a longer time period) | | | | |
| d | Ensuring the product offers a 20% discount over buying 8 peak-time day return tickets individually | | | | |

Overall Perceptions of Flexible Season Tickets

Ask all

| | |
|-----|---|
| Q29 | <p>Overall, to what extent do you think the introduction of the Flexi Season Ticket is a positive, or negative thing for passengers?</p> <p>[single-select]</p> |
| a | Very positive |
| b | Quite positive |
| c | Neutral |
| d | Quite negative |
| e | Very negative |
| f | Don't know |

| Q24 | To what extent do you agree or disagree with the following statements on Flexible Season Tickets: | | | | | | |
|-----|---|----------------|-------|----------------------------|----------|-------------------|------------|
| | | Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree | Don't know |
| a | Flexi Season Tickets meet the needs of people's new commuting patterns | | | | | | |
| b | Flexi Season Tickets support people to have a better quality of life | | | | | | |
| c | Flexi Season Tickets encourage people to use the train rather than other ways of travelling | | | | | | |
| d | Flexi Season Tickets are a better option for part time workers than conventional season products | | | | | | |

| | |
|-----|--|
| Q30 | <p>Do you have any other comments on Flexi Season Tickets?</p> <p>Are there any changes that could be made that would make you more likely to use Flexi Season Tickets?</p> <p>[open-ended]</p> |
| a | [open-ended] |

Demographics

Ask all [If select A do not allow b c d or e to be selected]

| | | |
|-----------|--|--|
| D1 | Which of the following apply to you? Please select all that apply. [multi-select] | |
| | a | I do not currently in work or education |
| | b | Work full time (30+ hours a week) (includes voluntary work) |
| | c | Work part time (less than 30 hours a week) (includes voluntary work) |
| | d | Student (in full time education) |
| | e | Student (in part time education) |
| | f | Retired |
| | g | Other |

Ask if D1= b or c

| | | |
|------------|--|---|
| D1b | Which of the following best describes your situation? [single select] | |
| | b | I have the option to work from home all the time if I choose |
| | c | I have the option to work from home some of the time |
| | d | I do not have the option to work from home at all |

| | | |
|-----------|---|-----------------------|
| D2 | Are your day-to-day activities limited because of a health problem or disability which is lasting or expected to last for 12 months or more? [single select] | |
| | a | Yes, limited a lot |
| | b | Yes, limited a little |
| | c | No |
| | d | Prefer not to say |

Ask if D2=a, b

| | |
|------------|--|
| D2b | Do any of these conditions or illnesses affect you in any of the following areas? Please select all that apply. [multi-select] |
| a | Vision (for example blindness or partial sight) |
| b | Hearing (for example deafness or partial hearing) |
| c | Mobility (for example walking short distances or climbing stairs) |
| d | Dexterity (for example lifting and carrying objects, using a keyboard) |
| e | Learning or understanding or concentrating |
| f | Memory |
| g | Mental health |
| h | Stamina or breathing or fatigue |
| i | Socially or behaviourally (for example associated with autism spectrum disorder (ASD) which includes Asperger's, or attention deficit hyperactivity disorder (ADHD)) |
| j | Other (please specify) |
| k | Prefer not to say |

| | |
|-----------|---|
| D3 | Do you have caring responsibilities for individuals (children or adults) living in your household? Please select all that apply [multi select] |
| a | Yes – child(ren) younger than primary school age |
| b | Yes – child(ren) of primary school age |
| c | Yes – child(ren) of secondary school / sixth form age |
| d | Yes – adult(s) |
| e | No [single select] |

| | | |
|-----------|---|---|
| D4 | With which ethnicity do you most identify? [single select] | |
| | a | White |
| | b | Black / African/ Caribbean/ Black British |
| | c | Asian / Asian British |
| | d | Mixed/ Multiple ethnic groups |
| | e | Other ethnic group |
| | f | Prefer not to say |

If Q4=e or Q9=b-i

As a Flexi Season Ticket holder (or previous holder) would you be interested in taking part in further research on this topic? In 2022 you may be invited to take part in an online/telephone discussion, either alone or as part of a small group to give your views on Flexi Season Tickets in more detail.

If you agree to this, contact details you provide will be transferred to SYSTRA Ltd and one of their researchers will get in touch for research purposes only. Your contact details will not be linked to any responses you have provided as part of this survey, beyond being/having been a Flexi Season Ticket holder.

Would you be willing to have your details passed to SYSTRA?

WAVE 2 QUESTIONNAIRE

Privacy Notice

The Department for Transport (DfT) is carrying out this survey to gather evidence on flexible season tickets. This survey and the processing of personal data that it entails is necessary for the exercise of our functions as a government department. Where any special category data is being processed, condition (g) (reasons of substantial public interest) of article 9 will be relied upon.

For any information that allows you to be identified, DfT will, under data protection law, be the Controller for this information. SYSTRA have been contracted to analyse the responses to this survey. They are the Processor for this information. Yonder Data Solutions have been contracted by SYSTRA to collect responses to this survey. They are the sub-processor.

As part of this survey we'll ask about your age, gender, region, income band, work status, transport usage, origin and destination station, ethnicity, any caring responsibilities you may have, and about any disabilities you may have. At the end of the survey, you will be given the option to provide your consent to take part in further research on this subject. If you agree to be recontacted, researchers from SYSTRA may contact you within the next 12 months.

The data from this survey is being collected to help in the analysis of survey results. Recontacts will be used for follow-up research designed to improve policy development for rail to deliver a better service. You don't have to provide this information if you don't want to. Your participation in this study is entirely voluntary. The survey will be carried out according to the Market Research Society (MRS) Code of Conduct.

DfT's privacy policy has more information about your rights in relation to your personal data, how to complain and how to contact the Data Protection Officer. You can view it at <https://www.gov.uk/government/organisations/department-for-transport/about/personal-information-charter>.

To receive this information by telephone or post, contact us on 0300 330 3000 or write to Data Protection Officer, Department for Transport, 3rd Floor, One Priory Square, Hastings, TN34 1EA.

Your information will be kept securely by SYSTRA/Yonder Data Solutions and then transferred to DfT at the end of the fieldwork period. DfT will only receive pseudonymised data. Yonder Data Solutions/SYSTRA will only retain your data in a way that can identify you for as long as is necessary to support the research project and findings. In practice, this means that once SYSTRA have satisfactorily reported the pseudonymous research findings to DfT, both Yonder Data Solutions and SYSTRA will securely remove your personal, identifying data from their systems. For this project Yonder Data Solutions and SYSTRA will securely remove your personal data from their systems by December 2022.

Please contact SYSTRA's Data Protection Officer at UK_Compliance@systra.com should you wish to withdraw or amend any personal data submitted as part of this survey transferred to SYSTRA.

The survey will last no more than 10 minutes.

By clicking ">>", you agree to give your views. You can stop the survey at any time.

Scoping

(Note that the order of the scoping questions appears in a different order online, and a quality question on number of adults and children in the household has been added online only)

| | |
|-----------|--|
| S1 | Over the past month, how frequently have you typically been travelling by train? Please include travel on National Rail and exclude travel on the underground, DLR, the Elizabeth Line or London overground services. |
| a | 5 or more days a week [screen out] |
| b | 2-4 days a week |
| c | Less than two days a week |
| d | Never |

Ask if **S1=c** or **S1=d**

| | |
|-----------|--|
| S2 | Compared to the last month or so, do you anticipate the amount you travel by train changing over the next 6 months? Please continue to consider travel on National Rail only (exclude travel on the underground, DLR, the Elizabeth Line or London overground services). Please assume no disruptions or travel restrictions will be in place over the next 6 months. |
| a | No – no change [screen out] |
| b | Yes – decreasing a little [screen out] |
| c | Yes – increasing to 2-4 days a week |
| d | Yes – increasing to 5 days or more a week [screen out] |

| | |
|-----------|---|
| S3 | Which of the following regions do you live in? |
| a | North East |
| b | North West |
| c | Yorkshire & Humberside |
| d | West Midlands |
| e | East Midlands |
| f | East of England |
| g | London |
| h | South East |
| i | South West |
| J | Scotland [screen out] |
| k | Wales [screen out] |
| l | Northern Ireland [screen out] |

Ask if **S3=g** or h

| | |
|-----------|---|
| S4 | When travelling by train, does your usual train journey take place: [single select] |
| a | entirely within London Zones 1-9 [screen out] |
| b | entirely outside London Zones 1-9 |
| c | Both within and outside London Zones 1-9 |

Quotas

| | |
|-----------|--|
| S5 | With which gender do you most identify? [single select] |
| a | Female |
| b | Male |
| c | Prefer to self-describe as: [open end] |
| d | Prefer not to say |

| | |
|-----------|---|
| S6 | Please tell us your age. [open numeric text, screen out under 18s] |
| a | [open text] |

| | |
|-----------|---|
| S7 | What is your household income? If you are not sure, please provide your best estimate. [single select] |
| | Under £5,000 |
| a | £5,001-£14,000 |
| b | £14,001-£21,000 |
| c | £21,001-£28,000 |
| d | £28,001-£41,000 |
| e | £41,001-£48,000 |
| f | £48,001-£55,000 |
| g | £55,001-£75,000 |
| h | £75,001-£100,000 |
| i | £100,001-£120,000 |
| j | £120,001 or more |
| j | Prefer not to say |

Typical Rail journey

| | |
|-----------|---|
| | <p>[If S1=b show] You've said that over the past month or so, you have typically been travelling by train 2-4 days a week. Please think about the train journey you have made most frequently.</p> <p>Which train stations do your outward journey start and end at?</p> <p>[If S2=c show] You've said that you anticipate travelling by train 2-4 days a week within the next six months. Please think about the train journey you are going to be making most frequently.</p> <p>Which train station will your outward journey start and end at?</p> <p>For this, we mean only stations served by National Rail. Please exclude any travel on the underground, DLR, the Elizabeth Line or London overground services.</p> |
| Q1 | |
| A | Start station [open text] |
| b | End station [open text] |

| | |
|-----------|--|
| Q3 | <p>[If S1=b show] What is the main purpose of this journey?</p> <p>[If S2=c show] What will be the main purpose of this journey?</p> <p>[single-select]</p> |
| a | Commuting to/from work |
| b | Travel to school/college/university (including accompanying a child) |
| c | Travel for work-related business |
| d | Travel for personal business (e.g. appointments) |
| e | Visiting friends and/or relatives |
| f | Shopping trips |
| g | Leisure trips |
| h | Providing care or support for a vulnerable friend or relative |
| i | Other (please specify) |

| | |
|-----------|---|
| Q4 | <p>[If S1=b show] Which ticket type do you use most frequently for this journey?</p> <p>[If S2=c show] Which ticket type will you use most frequently for this journey?</p> <p>[single select]</p> |
| a | Anytime/Standard/Peak Single/Return |
| b | Off-Peak/Super Off-Peak Single/Return |
| c | Advance |
| d | Day Travelcard |
| e | Flexible Season Ticket |
| f | Weekly Season Ticket |
| g | Monthly Season Ticket |
| h | Annual Season Ticket |
| i | Special promotion ticket e.g. rover ticket |
| j | Other (please specify) |

| | |
|----|--|
| Q5 | <p>[If S1=b show] Do you use a Railcard discount for this journey? [If S2=c show] Will you use a Railcard discount for this journey?</p> |
| b | <p>Yes - Family & Friends Railcard Yes - Senior Railcard Yes - 16-25 Railcard Yes - 26-30 Railcard Yes - Two Together Railcard Yes - Network Railcard Yes - Disabled Person's Railcard Yes - Other Railcard No</p> |

Future of the commute

Ask section if Q3=a

| | |
|----|--|
| Q6 | <p>Thinking ahead to a year from now, and assuming there are no disruptions or travel restrictions in place that affect you, and that you stay in the same/similar role, approximately how many days <u>each week</u> are you expecting to work? Please round to the nearest day.</p> |
| a | <p>[open text, allow numbers between 1-7]</p> |
| b | <p>I will no longer be working [single-select, go to Flexible Season Ticket Holders]</p> |

Q7 Where do you think you will spend your time working, in an average working month (approx. [Q6 x4] days, based on your answer to the earlier question)?

Please enter '0' if you will not work in any of the following locations.

If you are not sure, please provide your best estimate.

| | | |
|---|---|--------------------------|
| a | Office | _____ days |
| b | Home | _____ days |
| c | Other defined workplace (e.g. construction site, hospital, educational facility, health facility, retail, agricultural, workshop/manufacturing) | _____ days |
| d | No fixed location (e.g. driver) | _____ days |
| f | Total: | [data check = Q x4] days |

Q8 Still thinking ahead to a year from now, how frequently do you expect to be able to:

[single select per row]

| | | Always | Very often | Sometimes | Rarely | Never | Don't know |
|---|--|--------|------------|-----------|--------|-------|------------|
| a | Work from home when you choose to do so | | | | | | |
| b | Commute to or from your place of work during 'off-peak hours' in the morning (i.e. outside 7am to 10am) | | | | | | |
| c | Commute to or from your place of work during 'off-peak hours' in the afternoon/evening (i.e. outside 4pm to 7pm) | | | | | | |

Flexible Season Ticket holders

| | |
|------------------|---|
| <p>Q9</p> | <p>One Flexible Season Ticket provides 8 days of travel in 28 days, any time between two named stations.</p> <p>How many Flexible Season Tickets do you think you have purchased since they were launched around 12 months ago?</p> <p>(Please provide your best estimate)</p> |
| | <p>[open text]</p> <p>If Q4=e: Range 1-25</p> <p>If Q4≠e: Range is 0-25, and if answer is 0, skip to text before Q21 – Barriers to Use</p> <p>Provide alternative to entering number: ‘Don’t Know’ – if selected, skip to text before Q21 – Barriers to Use</p> |

| | |
|-------------------|---|
| <p>Q10</p> | <p>Have you purchased Flexible Season Ticket(s) using a Smartcard, or barcode ticket?</p> <p>[single-select]</p> |
| <p>a</p> | <p>Smartcard</p> |
| <p>b</p> | <p>Barcode</p> |
| <p>c</p> | <p>[If Q9=b do not show option] Both</p> |
| <p>d</p> | <p>Don’t know</p> |

| | |
|-------------------|--|
| <p>Q11</p> | <p>Thinking about your most recently purchased Flexible Season Ticket, is this still valid?</p> |
| <p>a</p> | <p>Yes – but I am not expecting to use up all the day passes on it</p> |
| <p>b</p> | <p>Yes – and I am expecting to use up all the day passes on it</p> |
| <p>c</p> | <p>No – it has expired and I did not use all the day passes on it</p> |
| <p>d</p> | <p>No – it has expired and I used up all the day passes on it</p> |
| <p>e</p> | <p>Don’t know</p> |

Ask if Q11=a or c

| | |
|-------------------|--|
| <p>Q12</p> | <p>[If Q11=a show] On your most recently purchased Flexible Season Ticket, how many of the 8 day passes do you <u>NOT</u> expect to use?</p> <p>[If Q11=c show] On your most recently purchased Flexible Season Ticket, how many of the 8 day passes were <u>NOT</u> used?</p> |
| <p>a</p> | <p>[open text, allow numbers between 0 and 7]</p> |

| | |
|-------------------|--|
| <p>Q13</p> | <p>[If Q11=a or b show] Will you make <u>more journeys</u> by train during the 28 days your Flexible Season Ticket is valid, than you would have made without a Flexible Season Ticket?</p> <p>If so, how many extra train journeys are you expecting to make over the 28 days your ticket is valid, compared to if Flexible Season Tickets were not available?</p> <p>[If Q11=c or d show] Thinking about your most recent Flexible Season Ticket, did you make <u>more journeys</u> by train during the 28 days it was valid, than you would have made without a Flexible Season Ticket?</p> <p>If so, how many extra train journeys did you make over the 28 days your ticket was valid, compared to if Flexible Season Tickets were not available?</p> <p>[show both] If you are not sure, please provide your best estimate.</p> |
| <p>a</p> | <p>[drop down:</p> <p>No – having a Flexible Season Ticket has not encouraged me to travel by train more</p> <p>Yes – 1 extra return journey</p> <p>Yes – 2 extra return journeys</p> <p>Yes – 3 extra return journeys</p> <p>Yes – 4 extra return journeys</p> <p>Yes – 5 extra return journeys</p> <p>Yes – 6 extra return journeys</p> <p>Yes – 7 extra return journeys</p> <p>Yes – 8 extra return journeys</p> <p>Don't know]</p> |

| | |
|--------------------|--|
| <p>Q13a</p> | <p>To what extent do you agree or disagree with the following statement?</p> <p>The Flexible Season Ticket has saved me money on my travel costs</p> <p>[single select]</p> |
| <p>a</p> | <p>Strongly agree</p> |
| <p>b</p> | <p>Agree</p> |
| <p>c</p> | <p>Neither agree nor disagree</p> |
| <p>d</p> | <p>Disagree</p> |
| <p>e</p> | <p>Strongly disagree</p> |
| <p>f</p> | <p>Don't know</p> |

| | |
|-------------------|--|
| <p>Q14</p> | <p>[If Q11=a or b show] Please think about your current Flexible Season Ticket, and the journey you usually use it for. During the 28 days your Flexible Season Ticket is valid, will you use any other train tickets for this journey,</p> <ul style="list-style-type: none"> - either to make part of this journey, or - to make this journey on a day you choose not to use one of your day passes? <p>Please select all that apply.</p> <p>[If Q11=c or d show] Please think about the most recent Flexible Season Ticket you have purchased, and the journey you usually used it for. During the 28 days your Flexible Season Ticket was valid, did you use any other train tickets for this journey,</p> <ul style="list-style-type: none"> - either to make part of this journey, or - to make this journey on a day you chose not to use one of your day passes? <p>Please select all that apply.</p> <p>[multi-select]</p> |
| a | No [single select] |
| b | Anytime/Standard/Peak Single/Return |
| c | Off-Peak/Super Off-Peak Single/Return |
| d | Advance |
| e | Day Travelcard |
| f | Oyster Pay As You Go |
| g | Weekly Season Ticket |
| h | Monthly Season Ticket |
| i | Annual Season Ticket |
| j | Special promotion ticket e.g. rover ticket |
| k | Don't know |
| l | Other (please specify) |

| | |
|-----|---|
| Q15 | <p>If the Flexible Season Ticket was not available what would you be <u>most</u> likely to do?</p> <p>[If S1=b show] Please think about the journey you are most frequently making.</p> <p>[If S2=c show] Please think about the journey you are going to be making most frequently.</p> |
| a | Change the time of day to travel off-peak |
| b | Not make the journey at all |
| c | Make the journey by another way of travelling |
| d | Make the journey by train, but less frequently |
| e | Make the journey by train, but more frequently |
| f | There would be no change to the way I travel |
| g | Other (please specify) |
| h | Don't know |

Ask if Q15≠b or c

| | |
|-----|---|
| Q16 | <p>If the Flexible Season Ticket was not available, what train ticket would you be <u>most</u> likely to purchase?</p> <p>[If S1=b show] Please think about the journey you are most frequently making.</p> <p>[If S2=c show] Please think about the journey you are going to be making most frequently.</p> |
| a | Anytime/Standard/Peak Single/Return |
| b | Off-Peak/Super Off-Peak Single/Return |
| c | Advance |
| d | Day Travelcard |
| e | Weekly Season Ticket |
| g | Monthly Season Ticket |
| f | Annual Season Ticket |
| g | Special promotion ticket e.g. rover ticket |
| j | Other (please specify) |
| h | Don't know |

| Q17 | Compared with your experience purchasing other types of train tickets, do Flexible Season Tickets compare positively or negatively on the following features: | | | | |
|-----|--|--------------------------------|----------------------|--------------------------------|---------------|
| | | Compar es negativel y | No differenc e | Compar es positivel y | Don't know |
| a | Ease of purchase | | | | |
| b | Ease of use when travelling | | | | |
| c | Flexibility /ease of changing plans | | | | |
| d | Ease of getting refunds | | | | |
| e | Simplicity of calculating ticket cost | | | | |
| f | Value for money | | | | |
| g | Suiting my travel needs | | | | |
| h | Fairness for people with a range of different travel needs | | | | |

| Q18a | Are you intending to purchase another Flexible Season Ticket (single select) |
|------|--|
| | [If Q11=a or b: show the following answers for a-c] |
| a | Yes – when I have used all the journeys, which will be before the expiry date |
| b | Yes – as soon as my current ticket reaches its expiry date |
| c | Yes – within a month |
| | [If Q11=c or d or e show the following answers for a-c] |
| a | Yes – in the next day or two |
| b | Yes – within the next week (but not within the next day or two) |
| c | Yes - within the next month (but not within a week) |
| | [All – show the following answers for d-f] |
| c | Yes – further into the future |
| d | No |
| e | Don't know |

Ask if Q18=d or e

| | |
|-------------------|--|
| <p>Q20</p> | <p>[If Q18=d show] Why do you say that? [If Q18=e show] Why are you not sure? Please select all that apply. [multi-select] [options randomised]</p> |
| a | I will be travelling by train more, so will purchase a different ticket type |
| b | I will be travelling by train less, so will purchase a different ticket type |
| c | I will not be able to predict my train travel over the 28 day period |
| d | I will wait before purchasing another Flexible Season Ticket as I will be taking holiday |
| e | I am not sure it saves me money compared to other train tickets |
| f | The cost of purchasing 8 tickets in advance is too high |
| g | The discount offered is not high enough |
| h | The smartcard/barcode ticket did not (always) work at the ticket gates |
| i | It is too complicated to use |
| j | I am not able to predict my travel pattern in advance |
| k | It is too complicated to purchase |
| l | I did not use up all the journeys on my last Flexible Season Ticket |
| m | I am concerned about getting ill and not being able to make the journeys |
| n | I sometime prefer to travel First Class |
| o | I am concerned about the potential impact of strike action on my ability to travel by train |
| p | Other (please specify) |

[\[Go to Q17\]](#)

Barriers to use

[Show if Q4≠e AND if Q9=a for all questions from here up to Q17] The Flexible Season Ticket provides 8 days of travel in 28 days - any time between two named stations.

The 8 days of travel do not need to be specified in advance. The Flexible Season Ticket offers savings for most commuters travelling during peak times, 2-3 days a week.

| | |
|------------|--|
| Q21 | Had you heard of the Flexible Season Ticket before reading this information? [single-select] |
| a | I had not heard of the Flexible Season Ticket at all |
| b | I had heard of the Flexible Season Ticket but was not aware of how it works |
| c | I had heard of the Flexible Season Ticket and was partially aware of how it works |
| d | I had heard of the Flexible Season Ticket and was aware how it works |
| e | Don't know |

Flexible Season Tickets are available as either a Smartcard or Barcode ticket, depending on the train operator/retailer. They are a digital only product i.e. it is not possible to purchase a paper Flexible Season Ticket.

If you have a Smartcard, you can buy your Flexible Season Ticket online and add it to your Smartcard when you get to the station. Or you can buy a Smartcard to use for the Flexible Season Ticket.

You can buy a Flexible Season Ticket as a Barcode ticket (where available) online or app. This will either be emailed, or it will be delivered to your app and stored there.

| | |
|------------|--|
| Q22 | [Ask if Q21=b, c, d] Were you aware or not aware that Flexible Season Tickets are digital-only products before reading that information? [single-select] |
| a | Yes – I was aware |
| b | No – I was not aware |
| c | Don't know |

| | |
|-------------------|--|
| <p>Q23</p> | <p>Based on what you have seen or heard, do you think the Flexible Season Ticket offers good value for money, or not?</p> <p>[single-select]</p> |
| <p>a</p> | <p>Offers good value for money</p> |
| <p>b</p> | <p>Does not offer good value for money</p> |
| <p>c</p> | <p>I don't know</p> |

| | |
|--------------------|--|
| <p>Q23b</p> | <p>Have you ever compared the prices of different kinds of ticket with the Flexible Season Tickets?</p> <p>[single-select]</p> |
| <p>a</p> | <p>Yes</p> |
| <p>b</p> | <p>No</p> |

Ask if Q4≠e

| | |
|-------------------|---|
| <p>Q25</p> | <p>[If S1=b show] What are the reasons you did not use a Flexible Season Ticket for the journeys you have been making over the past month or so? Please select all that apply.</p> <p>[If S2=c show] What are the reasons you are not planning on using a Flexible Season Ticket for journeys in the future?</p> <p>[multi-select, randomise except a]</p> |
| a | I have not heard of the Flexible Season Ticket [single select] |
| b | I cannot work out whether it will save me money compared to other train tickets |
| c | I did not realise that I could use it on my route |
| d | I was not sure if I would travel enough to make it worthwhile |
| e | The cost of purchasing 8 tickets in advance is too high |
| f | I do not have the correct smartcard/do not know how to get one |
| g | The discount offered is not high enough |
| h | I do not believe the smartcard/barcode ticket will work at the ticket gates |
| i | I do not want/am unable to purchase a digital-only product |
| j | I prefer other ticket options |
| k | It is too complicated to use |
| l | I am not able to predict my travel pattern in advance |
| m | My journeys involves multiple operators and I do not understand how that would work |
| n | There is not a single platform to purchase tickets from |
| o | I have holiday booked |
| p | I was concerned about getting ill and not being able to make the journeys |
| q | I sometimes prefer to travel First Class |
| r | I prefer to be able to travel outside of peak travel times |
| S | I am nervous about using a digital ticket |
| t | Other (please specify) |

Ask if Q25>1

| | |
|--------------------|--|
| <p>Q25b</p> | <p>[If S1=b show] Of the reasons you selected, which has the biggest influence on why you did not use a Flexible Season Ticket for the journeys you have been making over the past month or so?</p> <p>[If S2=c show] Of the reasons you selected, which has the biggest influence on why you are not planning on using a Flexible Season Ticket for journeys in the future?</p> <p>[single-select, only show options selected above]</p> |
| <p>a</p> | <p>I cannot work out whether it will save me money compared to other train tickets</p> |
| <p>b</p> | <p>I did not realise that I could use it on my route</p> |
| <p>c</p> | <p>I was not sure if I would travel enough to make it worthwhile</p> |
| <p>d</p> | <p>The cost of purchasing 8 tickets in advance is too high</p> |
| <p>e</p> | <p>I do not have the correct smartcard/do not know how to get one</p> |
| <p>f</p> | <p>The discount offered is not high enough</p> |
| <p>g</p> | <p>I do not believe the smartcard/barcode ticket will work at the ticket gates</p> |
| <p>h</p> | <p>I do not want/am unable to purchase a digital-only product</p> |
| <p>i</p> | <p>I prefer other ticket options</p> |
| <p>j</p> | <p>It is too complicated to use</p> |
| <p>k</p> | <p>I am not able to predict the flexibility I will be able to take in advance</p> |
| <p>l</p> | <p>My journeys involves multiple operators and I do not understand how that would work</p> |
| <p>m</p> | <p>There is not a single platform to purchase tickets from</p> |
| <p>n</p> | <p>I have holiday booked</p> |
| <p>o</p> | <p>I was concerned about getting ill and not being able to make the journeys</p> |
| <p>p</p> | <p>I sometime prefer to travel First Class</p> |
| <p>q</p> | <p>I prefer to be able to travel outside of peak travel times</p> |
| <p>R</p> | <p>I am nervous about using a digital ticket</p> |
| <p>s</p> | <p>Other (please specify)</p> |

Ask if Q25=h

| | |
|------------|---|
| Q26 | Why is the Flexible Season Ticket only being available as a digital product a reason why you would not use it? Please select all that apply. [multi-select] [options randomised] |
| a | I do not have a Smartcard |
| b | I do not want to get a Smartcard |
| d | I do not have a way of having the barcode ticket on an app |
| e | I prefer using paper tickets |
| f | I don't trust digital products |
| g | I don't think it will work at the ticket gate barriers |
| h | I don't want to make the purchase online |
| i | I don't want to get my phone out at the ticket gate barriers |
| j | I am unable to make a purchase online |
| k | I don't understand digital products |
| L | I am nervous about using a digital ticket |
| m | Other (please specify) |

| | |
|------------|---|
| Q27 | Overall, how likely, or unlikely is it that you would use a Flexible Season Ticket in the next year or so? [single-select] |
| a | Very likely |
| b | Quite likely |
| c | Quite unlikely |
| d | Very unlikely |
| e | Don't know |

| | |
|-------------------|---|
| <p>Q17</p> | <p>Are there any changes that could be made to the Flexible Season Ticket that would make you more likely to use them?</p> <p>[multi-select] [options randomised]</p> |
| <p>a</p> | <p>No – nothing would make me more likely to use them [single select, Go to Q28]</p> |
| <p>b</p> | <p>Being able to purchase a paper ticket</p> |
| <p>c</p> | <p>Ability to roll-over unused tickets to another time period</p> |
| <p>d</p> | <p>Increased discount compared to other tickets</p> |
| <p>e</p> | <p>Increased validity period (for example, allowing a full month rather than 28 days to use the 8 journeys)</p> |
| <p>f</p> | <p>A 'credit' provided if a journey is made off-peak</p> |
| <p>g</p> | <p>Ability to apply Railcard discounts</p> |
| <p>h</p> | <p>Ability to freeze the product for a short period</p> |
| <p>i</p> | <p>A discount on first-time purchases of Flexible Season Tickets</p> |
| <p>j</p> | <p>Allowing an automatically recurring purchase</p> |
| <p>k</p> | <p>Reminder email when ticket is about to expire</p> |
| <p>l</p> | <p>Option for refund for unused days</p> |
| <p>m</p> | <p>Other (please specify)</p> |
| <p>n</p> | <p>Don't know</p> |

Ask if Q17>1

| | |
|------|---|
| Q17b | <p>Of the changes you selected, which would have the single biggest influence in making you more likely to use them?</p> <p>[single-select, only show options selected above]</p> |
| a | No – nothing would make me more likely to use them [single select] |
| b | Being able to purchase a paper ticket |
| c | Ability to roll-over unused tickets to another time period |
| d | Increased discount compared to other tickets |
| e | Increased validity period (for example, allowing a full month rather than 28 days to use the 8 journeys) |
| f | A ‘credit’ provided if a journey is made off-peak |
| g | Ability to apply Railcard discounts |
| h | Ability to freeze the product for a short period |
| i | A discount on first-time purchases of Flexible Season Tickets |
| j | Allowing an automatically recurring purchase |
| k | Reminder email when ticket is about to expire |
| l | Option for refund for unused days |
| m | Other (please specify) |
| n | Don’t know |

| | | | | | |
|-----|---|-------------|-----------|-------------|------------|
| Q28 | <p>As a reminder, the Flexible Season Ticket currently provides <u>8 days of travel in 28 days</u>. It is intended to provide a discount for those travelling 2-3 days per week at peak times. For the majority of passengers this discount is around the level of 12.5%.</p> <p>Would the following changes to the Flexible Season Ticket product offer make you more, or less likely to use them? Please assume that the cost of the ticket would change to reflect the change in number of day passes.</p> | | | | |
| | | Less likely | No change | More likely | Don't know |
| a | <u>5 days of travel in 28 days</u> (i.e. fewer journeys in the same time period) | | | | |
| b | <u>12 days of travel in 28 days</u> (i.e. more journeys in the same time period) | | | | |
| c | 16 days of travel in 2 months (i.e. double the journeys over a longer time period) | | | | |
| d | Ensuring the product offers a 20% discount over buying 8 peak-time day return tickets individually | | | | |

Overall Perception of Flexible Season Ticket

Ask all

| | |
|-----|--|
| Q29 | <p>Overall, to what extent do you think the introduction of the Flexible Season Ticket is a positive, or negative thing for passengers?</p> <p>[single-select]</p> |
| a | Very positive |
| b | Quite positive |
| c | Neutral |
| d | Quite negative |
| e | Very negative |
| f | Don't know |

| Q24 | To what extent do you agree or disagree with the following statements on Flexible Season Tickets: | | | | | | |
|-----|---|----------------|-------|----------------------------|----------|-------------------|------------|
| | | Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree | Don't know |
| a | Flexible Season Tickets meet the needs of people's new commuting patterns | | | | | | |
| b | Flexible Season Tickets support people to have a better quality of life | | | | | | |
| c | Flexible Season Tickets encourage people to use the train rather than other ways of travelling | | | | | | |
| d | Flexible Season Tickets are a better option for part time workers than conventional season products | | | | | | |

| | |
|-----|---|
| Q30 | <p>Do you have any other comments on Flexible Season Tickets?</p> <p>Are there any changes that could be made that would make you more likely to use Flexible Season Tickets?</p> <p>[open-ended]</p> |
| a | [open-ended] |

Demographics

Ask all [If select A do not allow b c d or e to be selected]

| | |
|-----------|--|
| D1 | Which of the following apply to you? Please select all that apply. [multi-select] |
| a | I do not currently in work or education |
| b | Work full time (30+ hours a week) (includes voluntary work) |
| c | Work part time (less than 30 hours a week) (includes voluntary work) |
| d | Student (in full time education) |
| e | Student (in part time education) |
| f | Retired |
| g | Other |

Ask if D1= b or c

| | |
|------------|--|
| D1b | Which of the following best describes your situation? [single select] |
| b | I have the option to work from home all the time if I choose |
| c | I have the option to work from home some of the time |
| d | I do not have the option to work from home at all |

| | |
|-----------|---|
| D2 | Are your day-to-day activities limited because of a health problem or disability which is lasting or expected to last for 12 months or more? [single select] |
| a | Yes, limited a lot |
| b | Yes, limited a little |
| c | No |
| d | Prefer not to say |

Ask if D2=a, b

| | |
|------------|--|
| D2b | <p>Do any of these conditions or illnesses affect you in any of the following areas? Please select all that apply.</p> <p>[multi-select]</p> |
| a | Vision (for example blindness or partial sight) |
| b | Hearing (for example deafness or partial hearing) |
| c | Mobility (for example walking short distances or climbing stairs) |
| d | Dexterity (for example lifting and carrying objects, using a keyboard) |
| e | Learning or understanding or concentrating |
| f | Memory |
| g | Mental health |
| h | Stamina or breathing or fatigue |
| i | Socially or behaviourally (for example associated with autism spectrum disorder (ASD) which includes Asperger's, or attention deficit hyperactivity disorder (ADHD)) |
| j | Other (please specify) |
| k | Prefer not to say |

| D2c | Do you own any of the following railcards, and if not, are you eligible for one (i.e. do you fit the criteria required to purchase one) (select one option for each row) | | | | |
|-----|---|---------------------------------|--|---------------------------------|-------------------------|
| | | Do not own I am not eligible | Do not own Do not know if I am eligible | Do not own But I am eligible | Yes I own this railcard |
| a | Disabled Person's Railcard | | | | |
| b | 16-17 Saver Railcard | | | | |
| c | 16-25 Railcard | | | | |
| d | 26-30 Railcard | | | | |
| e | Senior Railcard | | | | |
| f | Veterans Railcard | | | | |
| g | HM Forces Railcard | | | | |
| h | Network Railcard | | | | |

| D3 | Do you have caring responsibilities for individuals (children or adults) living in your household? Please select all that apply [multi select] | |
|----|---|---|
| | a | Yes – child(ren) younger than primary school age |
| | b | Yes – child(ren) of primary school age |
| | c | Yes – child(ren) of secondary school / sixth form age |
| | d | Yes – adult(s) |
| | e | No [single select] |

| | | |
|-----------|---|---|
| D4 | With which ethnicity do you most identify? [single select] | |
| | a | White |
| | b | Black / African/ Caribbean/ Black British |
| | c | Asian / Asian British |
| | d | Mixed/ Multiple ethnic groups |
| | e | Other ethnic group |
| | f | Prefer not to say |

If Q4=e or Q9=b-i

As a Flexible Season Ticket holder (or previous holder) would you be interested in taking part in further research on this topic? In 2022 you may be invited to take part in an online/telephone discussion, either alone or as part of a small group to give your views on Flexible Season Tickets in more detail.

If you agree to this, contact details you provide will be transferred to SYSTRA Ltd and one of their researchers will get in touch for research purposes only. Your contact details will not be linked to any responses you have provided as part of this survey, beyond being/having been a Flexible Season Ticket holder.

Would you be willing to have your details passed to SYSTRA?

Annex D: In-depth Interviews Topic Guide

Welcome and Introductions [3 mins]

Explanation of research purpose

(Do not read this section if the interview is completed at the same time as the initial contact is made)

- Interviewer to introduce themselves/SYSTRA – an independent consultancy specialising in research within the transport sector.
- You recently responded to a survey undertaken by Yonder for the Department for Transport. The survey was on Flexible Season Tickets. You were then contacted and asked to take part in a telephone interview, which was arranged for today. Thank you for agreeing to take part.
- The purpose of today's interview is to go beyond the findings of the survey you completed, and explore more about your use of and views on Flexible Season Tickets, and your motivations for purchasing it.
- The feedback you provide us today will be combined with other peoples' responses, and with the online survey findings, and be shared with the Department for Transport as part of a wider evaluation of Flexible Season Tickets.
- The privacy information for this interview remains the same as we supplied with the online survey. [Would you like me to provide you with information as to where you can read about your rights in relation to your personal data, how to contact the Data Protection Officer, how your data will be stored, or who you should contact should you wish to complain or withdraw or amend any data submitted as part of this survey?
[If yes, send the privacy information provided for the online survey by email or as preferred]
[Amend wording slightly if already sent with Teams invite or email]

Explanation of session

- The interview will last around 30-40 minutes.
- Just to emphasise:
 - There are no right or wrong answers;
 - You may leave at any point if you no longer wish to take part; and
 - You are not obliged to answer any questions you don't want to.

- The session today will be audio recorded. The recording will only be listened to by the SYSTRA project team to assist interview write ups, and will be deleted at the end of the project. Everything you say will be reported anonymously.
- To ensure compliance with data protection legislation, can you please confirm that have been informed as to the purposes of this project, and that you consent to the use of audio recording. *Once consent confirmed, SYSTRA moderator to start audio recording, and clearly state 'The participant(s) have been informed as to the purposes of this work and have consented to the use of audio recording.'*

Detailed Discussions [35 mins]

About you [5 MINS]

Before we talk about flexible season tickets I'd like to start with a few questions about your working and travel patterns to give me a bit of context about your ticket requirements.

- Can I confirm that you currently use or have used a Flexible Season Ticket? [Close if no]
- Are you currently working?

If working:

- How many days a week do you work?
- Are any of these days working at home?
 - On average how many?
 - Is this your or your employers choice?
 - How much flexibility do you have in deciding where you work day-to-day?
 - Which are your preferred days for travelling in, and why?
- Are any of your working days working away from home?
 - On average how many?
 - Is it always to/from the same destination?
 - How do you get to and from work?
 - **If not train:** is train a possibility, and if yes, why isn't it used?

All:

- Do you regularly travel by train for other purposes?
 - How often?
 - How often is this to the same destination?
 - For what purpose?
- Do you own any kind of railcard? What kind?

Use and views of Flexible Season Ticket [10 MINS]

I'd now like to talk about your use and views of Flexible Season Tickets.

As you know, Flexible Season Tickets enable passengers to purchase:

- *A bundle of 8 day passes*
- *Allowing unlimited travel on any 8 days in a 28-day period between 2 named stations*
- *You can travel at any time of day, in standard class only.*

- Do you currently own, or use, a Flexible Season Ticket for your rail journeys?

If yes:

- How did you first find out about Flexible Season Tickets?
- Can you tell me a bit about the journey you use your ticket for...
 - Where does it start and end (and do these stations have gates)
 - What is the main purpose of the journey you use it for?
- For how long have you been using a Flexible Season Ticket?
- How many tickets do you think you have purchased?
- **KEY QUESTION** What was it that initially encouraged you to purchase the product?
Prompt if necessary – extend conversation to fully understand all factors:
 - Convenience? Flexibility? Ease of purchase? Cost? Opportunity for more travel? etc
- (If relevant) And why do you continue to use a Flexible Season Ticket?
- What do you like about Flexible Season Tickets and what don't you like about them?
- Is your ticket a smartcard or barcode ticket? What do you like and dislike about this? Have you used both? (if so) Which do you prefer? Why?
- Overall, how satisfied or dissatisfied are you with your experience of using a Flexible Season Ticket? Why?

If no:

- How did you first find out about Flexible Season Tickets?
- For how long were you using a Flexible Season Ticket?
- Can you tell me a bit about the journey you use your ticket for...
 - Where does it start and end (and do these stations have gates)
 - What is the main purpose of the journey you use it for?
- How many tickets do you think you have purchased?
- **KEY QUESTION** What was it that initially encouraged you to purchase the product?
(Prompt if necessary – extend conversation to fully understand all factors:
 - Convenience? Flexibility? Ease of purchase? Cost? Opportunity for more travel? etc
- Why do you no longer use a Flexible Season Ticket?
- What do you like about Flexible Season Tickets and what don't you like about them?
- Was your ticket(s) a smartcard or barcode ticket(s)? What do you like and dislike about this? Have you used both? (if so) Which do you prefer? Why?
- Overall, how satisfied or dissatisfied were you with your experience of using a Flexible Season Ticket? Why?

Motivations for Purchasing a Flexible Season Ticket [10 MINS]

I'd now like you to think a little more about what [motivates/motivated] you to buy a Flexible Season Ticket.

- When you [decide/decided] to purchase a Flexible Season Ticket, how certain [are/were] you in knowing that you'd be making a sufficient number of train journeys to make the purchase worthwhile?
 - [Do/did] you purchase Flexible Season Tickets based on how much you think you might use it, or based on knowing for certain how much you'd use it?
 - How important, or not, is it for you to have certainty about how much you'd use your Flexible Season Ticket, to inform your decision on whether or not to purchase the product? Why?
- How do you keep track of how many days of travel are remaining on your Flexible season ticket? (prompts if necessary: Do you check an app? Calculate it in your head? Find out at the station when you start your journey?)
- Have you ever not used all 8 days on your Flexible Season Ticket before the 28 days has finished?

[If yes]

- Did this matter to you? Would it put you off purchasing again?
 - Did you consider seeking a refund? Did you get a refund?
 - [If no] Why not? [If yes] How did you find the refund process?
 - Did you understand/research the refund T&Cs for the unused days? Were they easy to understand? Were they fair?
- Have you ever used all 8 days on your Flexible Season Ticket before the 28 days has finished, and found yourself needing to purchase additional tickets as a result?

[If yes]

- What did you do? (prompts if necessary: Purchase individual tickets? Which ones? Purchase an additional Flexible Season Ticket? Avoid travelling altogether? Use a different way of travelling?)
- Why did you make this decision?

[If no]

- What do you think you would do if you found yourself in this situation? (prompts if necessary: Purchase individual tickets? Which ones? Purchase an additional Flexible Season Ticket? Avoid travelling altogether? Use a different way of travelling?)
 - Why do you think you'd make this decision?
 - Did you consciously limit your travel to ensure you didn't exceed the 8 day limit, or is this just a result of circumstance?
- How often, if ever, have you used your Flexible season ticket to travel in the off-peak or at weekends?
 - Do you ever purchase other tickets for the same journey you use a Flexible Season Ticket for, when your Flexible Season Ticket is still valid?

- [If yes] Why? Which ones? How are these used? (prompt if necessary: same day for part of the journey, different days for the same journey?)
- Were you aware, or not, that you could purchase more than one Flexible Season Ticket in a 28-day period?
 - [If no] Does this change how you'd purchase Flexible Season Tickets? How?
 - Is this something you have done / would do? Why / why not? (prompts if necessary: Is having to find the money to purchase a second ticket within 28 days something that prevents you from purchasing more than one ticket within 28 days?)
- Does having a Flexible Season Ticket encourage you to change your travel i.e. make more/less trips by train, or at a different time of day, than you would without one?
 - [If yes] How's your travel different because you have a Flexible Season Ticket
- How far in advance of travelling [do/did] you decide to purchase a Flexible Season Ticket?
 - Why is this your preferred timeframe?

Calculating cost savings [5 MINS]

Finally I would like to think about the costs of Flexible Season Tickets, which provide a discount compared to buying eight tickets individually.

- Have you ever thought about how much you might be saving by using Flexible Season Tickets compared to other types of ticket?

[If yes]

- Did you make a comparison?
- (if so) How?

Prompts to get a full understanding which of these applies:

- Made an assumption you would save money
 - Compared the costs with other ticket prices you could remember
 - Looked up the costs of other ticket prices (where)
 - Used the Network Rail Enquiries season ticket calculator
- What ticket types did you compare the Flexible Season Ticket cost with?
 - Overall do you think the Flexible Season Ticket saved you money? How much?
 - Do they know exactly?
 - If unable to say, prompt for: a lot; a little; not very much money; no savings at all

[If no]

- If you were to think now, how might you calculate your cost saving?
 - Prompts if not mentioned:
 - Where would you look?
 - Have you heard of the Network Rail Enquiries season ticket calculator?
 - What other types of ticket would you be comparing to?

- How important is whether you are making a saving to you?
- Overall do you think the Flexible Season Ticket saved you money? how much?
 - Do they know exactly? If so how (ask questions for those that said yes)
 - If unable to say, prompt for: a lot; a little; not very much money; no savings at all

Product Feedback [5 MINS]

- [Only ask this question if there is time] I'd now like to ask you about your experience of purchasing a Flexible Season Ticket. Where did you purchase your Flexible Season Ticket?
 - How easy or difficult was this?
 - [If difficult] What was difficult (prompt if necessary: finding how to purchase / where to purchase from / understanding the cost / the transaction / getting the ticket loaded / working out how to use it etc)
- I have 2 more questions about Flexible Season Tickets. Firstly, if you could make changes to the Flexible Season Ticket to make it more relevant to your needs, what would you change?

Prompt fully e.g.

- if more days passes per 28 days, how many more;
 - if more days to use your passes, how many more etc
- And finally, would you recommend using Flexible Season Tickets to others with similar travel patterns?
 - Why/why not?

Demographics and Close [2 MINS]

- Thank you for taking the time to talk to me about Flexible Season Tickets. We said we wouldn't link your data from the on-line survey to your telephone interview. Therefore please can you just tell us again about your age, gender and working status?
 - Please can you tell me your age?
 - Which gender do you most identify with?
 - In which county or city do you live?
 - Are you working, in education, not working, or retired?
 - (if working/education) is this full or part time?
 - Do you have a disability or health problem that limits your day to day activities and is expected to last more than 12 months (If yes) does it limit you a lot or a little?
- Are there any final comments you would like to make on anything we have discussed?
- Thank you very much for your contributions today. To confirm, SYSTRA will be taking away the feedback you have provided, and reporting the findings anonymously to Department for Transport. The feedback you provided will be combined with other peoples' responses, and with the online survey findings, and be shared with the Department for Transport as part of a wider evaluation of Flexible Season Tickets.