Zonalisation Study

Draft Report

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Executive Summary

- In January 2007, point to point non-season tickets in London were moved to a zonal structure
- Whilst it is envisaged that this will mean a "no net loss no net gain" for the TOCs, on some flows groups of customers will experience large increases or decreases in fares
- It is believed that this may lead to some or all of the following:
  - switching between point to point and Travelcard products
  - time shifting into and out of the shoulder peak times
  - shifting between day and non-zonalised season products
  - for discretionary journeys, decisions about travelling at all.
- ATOC wishes to understand how the zonalisation of non-season point to point tickets in London will change travel decisions and ticket purchasing patterns and in particular they wish to measure the extent to which simplification of the fares structure is generative
- With this in mind ATOC is undertaking a three phase piece of research work:
  - Stage 1: immediately prior to the new structure being implemented (ie fieldwork completed prior to Christmas 2006)
  - Stage 2: reasonably soon after the changes are in place (fieldwork to be undertaken in mid February 2007)
  - Stage 3: when the changes have become established (fieldwork to be undertaken in May/June 2007).
- This market research will be supported and enhanced by the undertaking of econometric analysis of actual ticket sales
- This report sets out the results of the first phase of market research which focused mainly on attitudinal and revealed preference data. The fieldwork was conducted in mid-December 2006, with the final day of interviewing being Friday 22nd December
- Fifteen flows were selected by ATOC for testing. However, given the timescales involved, and the costs to achieve robust sample sizes, these flows were not examined in detail. The research fieldwork was conducted evenly across these areas to provide a representative data source
- Quotas were imposed as follows (with interviews achieved in brackets):
  - Non users – 150 (achieved 150)
  - Season ticket point to point – 100 (achieved 101)
  - Non-season ticket – 120 (achieved 119)
  - Day Travelcard (ie: non season) – 100 (achieved 105)
  - Total interviews – 470 (achieved 475)
- Users:
  - There is confusion about the current (pre zonal) fares structure in operation in the region – with between a quarter and a third of respondents (depending on quota group) unable to describe the current system
  - Despite this confusion the majority of respondents consider the current (pre zonal) fare structure to be easy or very easy to understand
  - A similar pattern was seen in relation to the flexibility and consistency of the current system
  - There is a widespread lack of awareness of the new zonal fare structure amongst non-season point to point ticket holders
  - For those areas where the introduction of zonal fares will mean modest or big increases in fares, almost a third of respondents envisaged that the fare increase

would have resulted in their journey being made by a different mode, with a different ticket or would not have been made at all. 21 respondents (32%) out of the 64 located in areas which will experience increases in fares stated the increase in fares would result in them making fewer journeys by train into Central London
    - For those areas where the introduction of zonal fares will mean modest or big decreases in fares, just 12% of respondents envisaged that the fare decrease would have resulted in them making any changes to their journey (ie: travelled on a different class ticket or with a more flexible ticket or from a station further away from Central London). 16 respondents (37%) out of the 43 located in areas which will experience decrease in fares stated the decrease in fares would result in them making more journeys by train into Central London
- Non-Users:
    - Amongst non-users there is a general lack of awareness regarding the current (pre zonal) fare structure for train journeys in the region. Despite this, a third of non-users consider the existing structure to be easy or very easy to understand
    - There was also a lack of awareness regarding the perceived flexibility and consistency of the current fare structure
    - A willingness to consider trains for trips into Central London was expressed by half of the non-users interviewed – provided their main barriers to use were addressed
    - Non-users would predominantly look to station ticket offices and the National Rail website for information relating to train times and ticket costs if they were considering making a journey into Central London by train
    - Unsurprisingly very few non-users were aware of the introduction of zonal fares. Although when described to them over half of the non-user respondents considered the new structure to be good or very good

1. INTRODUCTION

1.1 Background

In January 2007, point to point non-season tickets in London were moved to a zonal structure. Whilst it is envisaged that this will mean a “no net loss no net gain” for the TOCs, on some flows groups of customers will experience large increases or decreases in fares. It is believed that this may lead to some or all of the following:

- switching between point to point and Travelcard products
- time shifting into and out of the shoulder peak times
- shifting between day and non-zonalised season products
- for discretionary journeys, decisions about travelling at all.

1.2 Objectives

ATOC wished to understand how the Zonalisation of non-season point to point tickets in London will change travel decisions and ticket purchasing patterns. In particular they wished to measure the extent to which simplification of the fares structure is generative.

With this in mind ATOC is undertaking a three phase piece of research work.

2. METHODOLOGY

2.1 Introduction

ATOC believes that it will be necessary to undertake both attitudinal market research and econometric analysis of actual ticket sales. For phase 1 only attitudinal market research has been undertaken to date although this might be incorporated with econometric analysis at a later date.

Three phases of attitudinal research were/will be required, namely:

- Stage 1: immediately prior to the new structure being implemented (ie fieldwork completed prior to Christmas 2006)
- Stage 2: reasonably soon after the changes are in place (fieldwork to be undertaken in mid February 2007)
- Stage 3: when the changes have become established (fieldwork to be undertaken in May/June 2007).

Accent undertook the attitudinal research for phase 1 and this report focuses on the findings of this initial phase. The fieldwork was undertaken during mid December 2006, the final day of interviewing being Friday 22 December.

2.2 Sample Size and Segmentation

The main focus of this study were those travellers making trips into Zones 1 and 2 from Zones 4-6 using non-season tickets. In addition, non-users were also covered. This research will enable an assessment to be made as to whether the simplification has led to an increase in rail users. However, season ticket users, although not the primary focus, were also included to explore whether zonalisation of non-season tickets might be a trigger for them to reconsider their travel and ticket choices.

The sample was segmented as follows:

- 20% with non-users of rail/tube/bus but who make journeys along the rail corridors in question and are non-rejecters of rail
- 20% with season ticket holders who make journeys along the rail corridors by train
- 60% with users travelling on non-season tickets who make journeys along the rail corridors by train.

Fifteen flows were selected by ATOC for testing. However, given the timescales involved, and the costs to achieve robust sample sizes, these flows were not examined in detail. The research fieldwork was conducted evenly across these areas to provide a representative data source. These areas were:

Area	Zones
Enfield Lock	123456
Surbiton	123456
Orpington	123456
Hadley Wood	123456

Area	Zones
Romford	123456
Chadwell Heath	12345
Norbiton	12345
Wallington	12345
New Southgate	1234
Richmond	1234
Worcester Park	1234
Shortlands	1234
Goodmayes	1234
Ilford	1234
Motspur Park	1234

Prior to the research Accent conducted 100 telephone interviews to provide some data as to the levels of penetration of the different ticket types currently used by those making journeys from of Zones 4-6 into Zones 1-2. At that time those travelling by rail with non-season tickets represented no more than 1% of the total population. However, the levels of incidence of the other groups of interest were less onerous.

For the main stage of the research the quotas imposed are shown in Figure 1.

Figure 1: Research quotas

	Non Users	Season ticket point to point	Non-season ticket	Non-season travelcard	Overall
Quotas	150	100	120	100	470

For this first phase of the attitudinal research Accent undertook 475 interviews broken down as follows in Figure 2.

Figure 2: Achieved quotas

	Non Users	Season ticket point to point	Non-season ticket	Non-season travelcard	Overall
Quotas	150	101	119	105	475

Segmentation was also required by journey purpose. Whilst we anticipated being able to achieve sufficient sample of commuters (through the interviews with season ticket users) we were more cautious in our ability to capture sufficient numbers of non-season ticket users travelling for business purposes and suggested that the majority of those travelling on these ticket types would be travelling for leisure purposes. During this initial phase of work the 325 user interviews were travelling for the following (main) purposes:

- Work/education commute: 127 interviews
- Business: 16 interviews
- Personal business/leisure: 171 interviews.

Questionnaire

The questionnaire took an average of 15 minutes to complete. There was only one questionnaire, which was designed with routing to accommodate users and non-users. For season ticket holders the routing means that the questionnaire was slightly shorter than for other respondents. A copy of the questionnaire is included as Appendix A.

Pilot

In order to test, among other things, the questionnaire and recruitment procedures Accent undertook a pilot of 30 interviews on the 11 December 2006. These interviews were spread to reflect the breakdown at the main stage in terms of users and ticket types as illustrated in Figure 1. The pilot indicated that in general the questionnaire worked well but that some people initially found the idea of zonal fares confusing although it is clearly explained later in the questionnaire. This was fed back to the client.

Telephone Interview

Research was undertaken using a telephone approach with sample selected by using RDD (random digit dialling) selected by postcode to reflect the flows selected by ATOC.

A screening questionnaire was designed to ensure that respondents were in-scope for the survey. This screening questionnaire is included as Appendix B. The screening questions included:

- Confirmation that respondent lived in one of the 15 selected areas and recording this location
- That respondents had made at least one trip into Central London (Zones 1 or 2) in the past month using either the bus, train, tube, car, motorbike or bicycle
- Number of trips into Central London made by national rail train (if none, these were classified as non-users)
- Whether respondents had caught the train from one of the 15 rail stations for any of these journeys.

Information was collected electronically relating to all respondents, including those out of scope, in order to provide ATOC with additional market sizing information.

3. FINDINGS

3.1 Introduction

The report breaks down respondents into the following four groups:

- Non-users of rail
- Point to point season ticket holders
- Non-season point to point ticket holders
- Daily Travelcard holders.

3.2 Screening Questions

For each of the four quota groups respondent interviews were fairly evenly spread across the 15 areas. All respondents had made at least one journey into Central London. Two thirds of journeys were made using a national rail train.

3.3 Findings – Users

Journey Characteristics

Interviews were spread across each of the quota groups and the national rail stations. The main national railway stations travelled to were: Waterloo (26%), Liverpool Street (14%), Kings Cross (7%) and Charing Cross (6%). All ticket type holders were most likely to travel to Waterloo, in particular respondents with a Day Travelcard (31%) Respondents were least likely to travel to Kings Cross using a Day Travelcard (2%) and were more likely to travel there with a non season point to point ticket (11%).

Table 1: Station respondents travelled to using a national rail train

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Waterloo	26	21	25	31
Liverpool Street	14	15	8	20
Kings Cross	7	8	11	2
Charing Cross	6	5	8	4
Base	**325**	**101**	**119**	**105**

Almost half of the point to point season ticket holders used a weekly season ticket (45%) for the national rail journey, whilst almost six in ten non season point to point ticket holders used a Standard Day return (58%) and just over eight in ten Day Travelcard respondents used an Off Peak Day Travelcard (82%).

Almost all respondents (98%) travelled standard class for this national rail journey, which was consistent across all of the ticket types.

Cost was the dominant reason for choice of ticket type with almost six in ten respondents (57%) stating this. However, this was less of an issue for the point to point season ticket holders with just under half (48%) citing the reason for purchase was it was the cheapest ticket and almost four in ten (39%) stating ‘It’s always the ticket I buy’.

Table 2: Reason for choice of ticket

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
It was the cheapest	57	48	60	63
It's the ticket I always buy	28	39	23	24
It was the one recommended by the ticket office staff	2	2	3	2
It was the only ticket that allowed me to travel at the time(s) I need to travel	6	4	10	3
Other	7	8	5	9
Base	**325**	**101**	**119**	**105**

Only respondents who had purchased Standard Day Returns (single or return), Cheap Day Returns (single or return) and train/tube (single or return) were asked whether they had considered purchasing a Day Travelcard for their journey. Just over half (54%) stated they had considered purchasing a Day Travelcard for their journey.

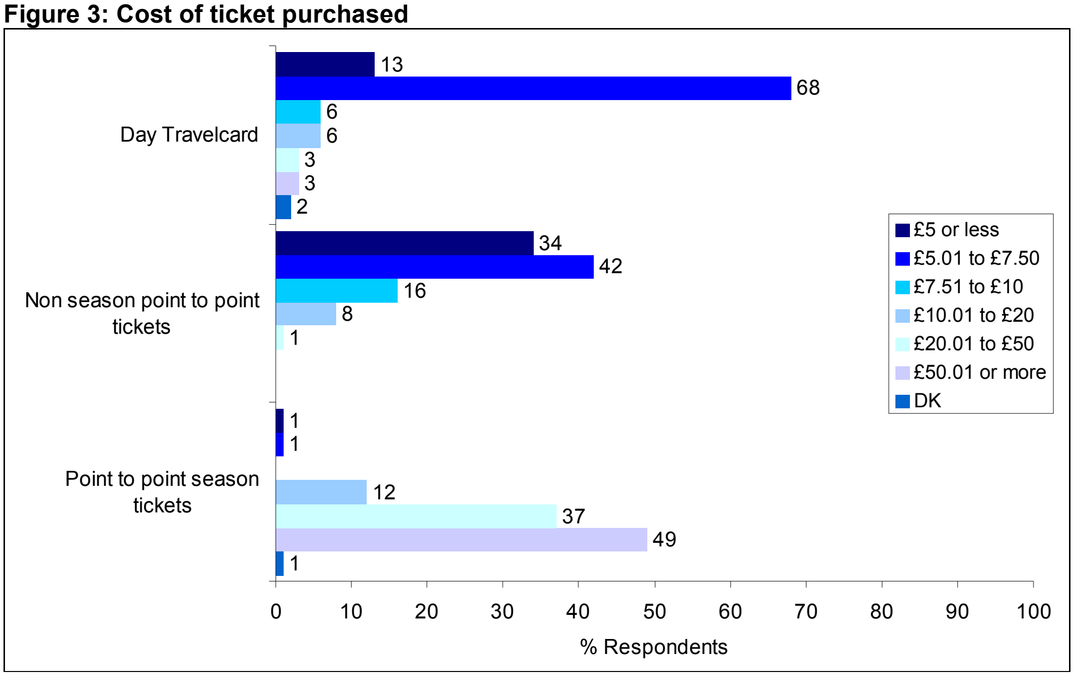
Clearly the cost of the ticket purchased varied by ticket type.

For the Day Travelcard holder just over eight in ten (81%) respondents had spent up to £7.50 on their ticket, with about two thirds (68%) spending between £5.01 and £7.50 and one in eight (13%) spending £5 or less.

For the non season point to point tickets holders three quarters had spent up to £7.50 on their ticket, with just over four in ten (42%) spending between £5.01 and £7.50 and a third spending £5 or less.

Almost nine in ten of the point to point season ticket holders (86%) had spent over £20 for their ticket, with 49% spending £50 or more and 37% spending £20 or more.

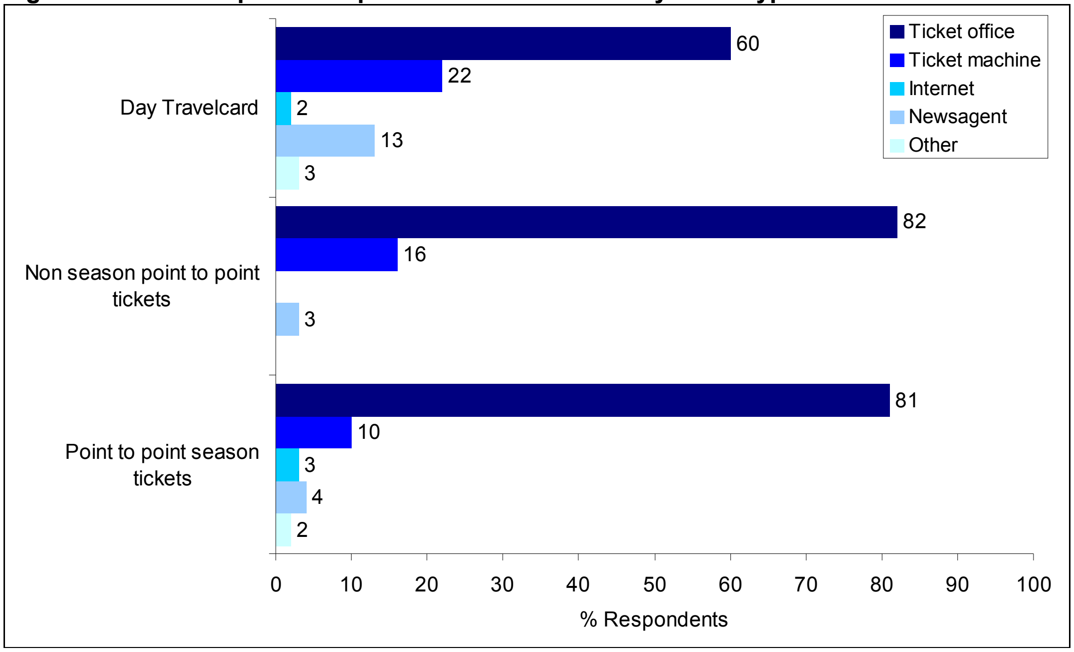
Figure 3: Cost of ticket purchased



In terms of where tickets had been purchased, approximately three quarters (74%) had been purchased in ticket offices, with a further sixth (16%) purchased from ticket machines.

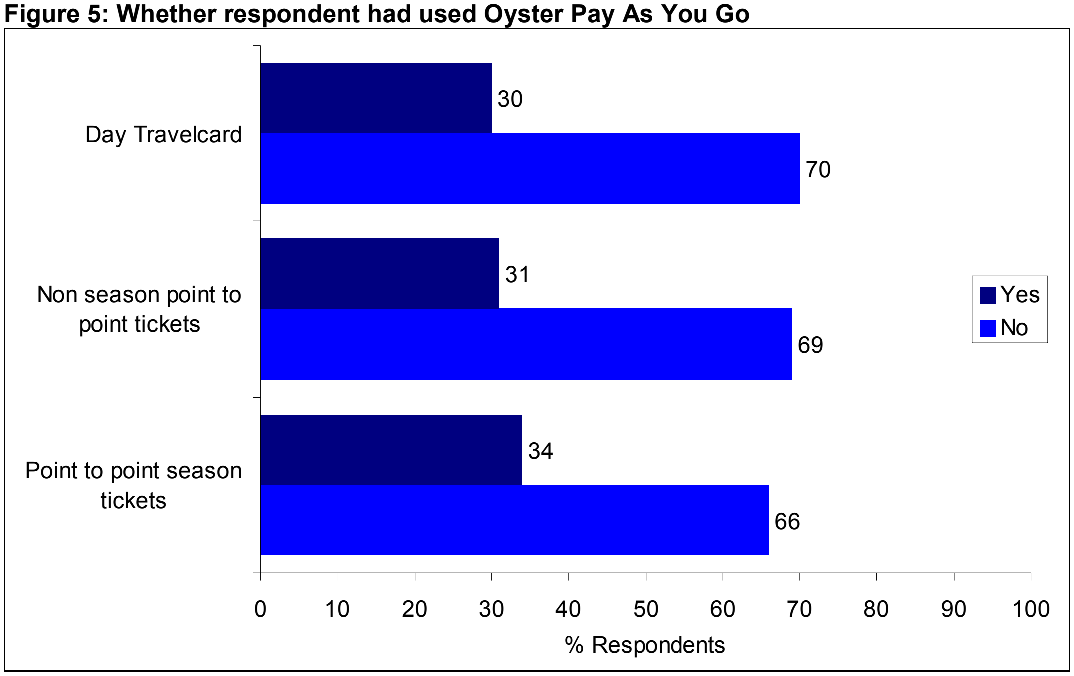
Point to point season tickets (81%) and non season point to point tickets (82%) were most likely to be purchased from ticket offices, whilst Day Travelcards were more likely to be purchased from a variety of locations including a ticket office (60%), ticket machine (22%) and newsagent (13%). Figure 4

Figure 4: Where respondents purchased their tickets by ticket type



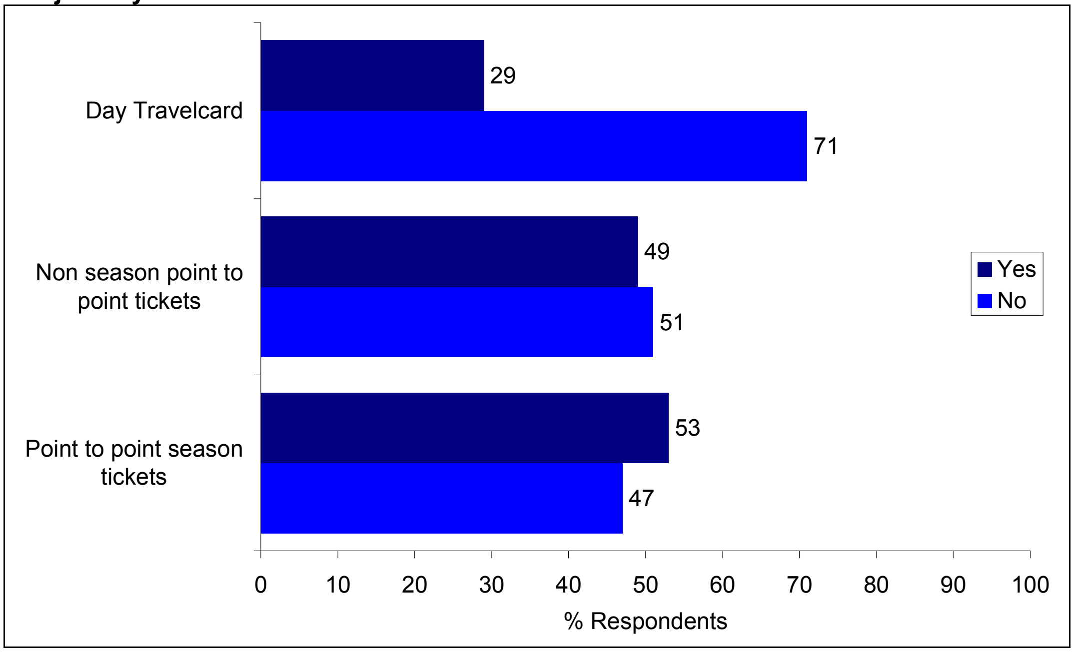
Just over two thirds of respondents have used Oyster Pay As You Go in the past, with the likelihood of using an Oyster card equally prevalent across all ticket types.

Figure 5: Whether respondent had used Oyster Pay As You Go



When asked if they had used their Oyster Pre Pay As You Go card for their most recent journey, just over four in ten (44%) had. Of this proportion, the use of their Oyster Pre Pay As You Go card to purchase their ticket for this journey was more prevalent among point to point season ticket holders (53%) and non season point to point ticket holders (49%) than Day Travelcard holders (29%). Figure 6

Figure 6: Whether respondent had used Oyster Pay As You Go to purchase tickets for this journey



Point to point season ticket holders were most likely to depart their origin station between 6:01 and 9:00 am (54%), whilst non season point to point ticket holders tend to depart later in the morning 36% between9:01 and 10:00 and 26% between 10:01 and 16:30 Day Travelcard holders were more likely to travel across a range of times from 6 am or earlier (10%), 6.01 to 9:00 (22%), 9:01 to 10:00 (27%) and 10:01 to 4:30 (22%).

Table 3: Time respondent left origin station

	Total %	**Point to point season tickets %**	**Non season point to point tickets %**	**Day Travelcard %**
0600 or earlier	5	5	2	10
0601 to 0900	33	54	24	22
0901 to 1000	28	20	36	27
1001 to 1630	19	7	26	22
1631 to 1830	5	1	6	7
1831 or later	3	3	3	3
NS	8	10	3	10
Mean	**10:04:03**	**08:57:19**	**10:42:29**	**10:21:37**
Std. Deviation	03:28:18	02:50:12	03:11:17	04:05:11
Base	300	91	115	94

The mean journey departure time for respondents of point to point season tickets is 08:57 and for non season point to point ticket holders the mean departure time is 10:42

Having departed between 06:01 and 09:00, 39% of point to point season ticket holders were also most likely to arrive at the destination station between 6.01 and 9am, whilst non season point to point ticket holders and Day Travelcard holders were more likely to arrive between 10:01 and 16:30 (61% and 38% respectively).

Table 4: Time respondent arrived at destination station

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
0600 or earlier	3	4	2	4
0601 to 0900	21	39	8	18
0901 to 1000	16	17	17	13
1001 to 1630	42	26	61	38
1631 to 1830	4		5	7
1831 or later	4	4	4	5
NS	10	11	4	15
Mean	**10:51:45**	**09:32:24**	**11:32:34**	**11:19:43**
Std. Deviation	03:32:01	03:04:01	03:06:42	04:06:30
Base	293	90	114	89

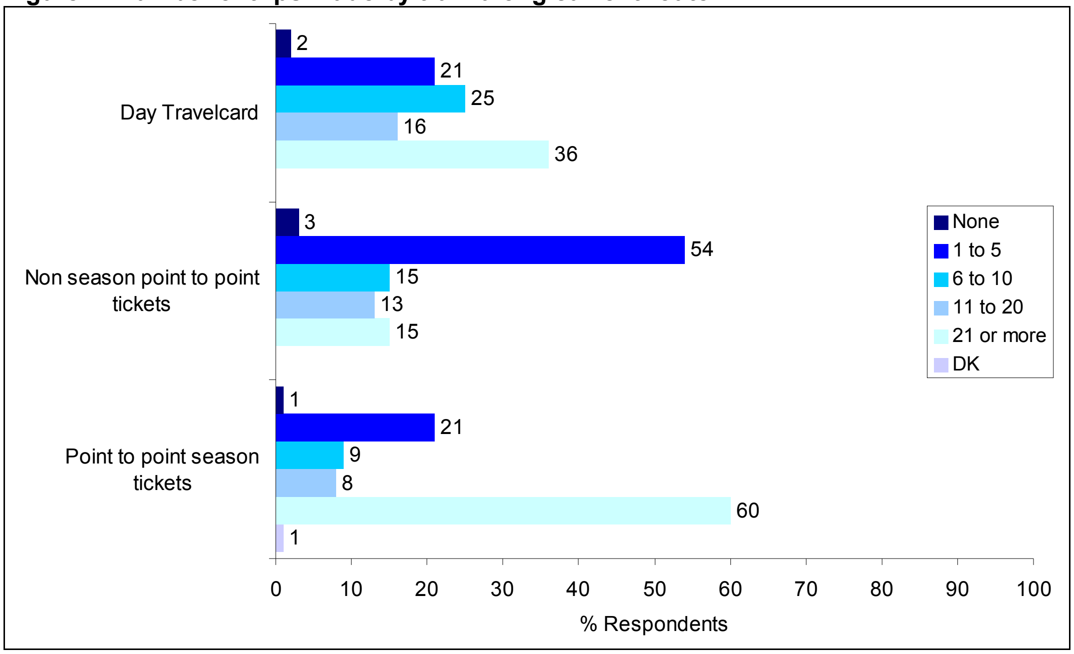
Overall the main purpose of the rail journey was daily work commuting (26%), with two thirds of point to point season ticket holders likely to state this. Non season point to point ticket holders were more likely to offer a range of journey purposes with approximately a fifth stating visiting friends/relatives (22%), shopping (20%) or having a day out (19%) as their main journey purpose. Day Travelcard holders also offered a variety of journey purposes including visiting friends/relatives (22%), having a day out (14%) and sport/entertainment (10%) and shopping (10%).

Table 5: Main purpose of the rail journey

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Daily work commuting	26	66	5	11
Visiting friends/relatives	16	3	22	22
Day out	13	5	19	14
Shopping	12	5	20	10
Less frequent work commuting	6	9	8	3
Sport/entertainment	6	2	6	10
Employers' business (or own business if self employed)	5	3	3	9
Personal business (eg going to doctor, lawyer)	5	1	7	6
Daily education commuting	4	5	3	5
Less frequent education commuting	2		3	3
Holiday	1		2	
Other	3	1	2	8
Base	**325**	**101**	**119**	**105**

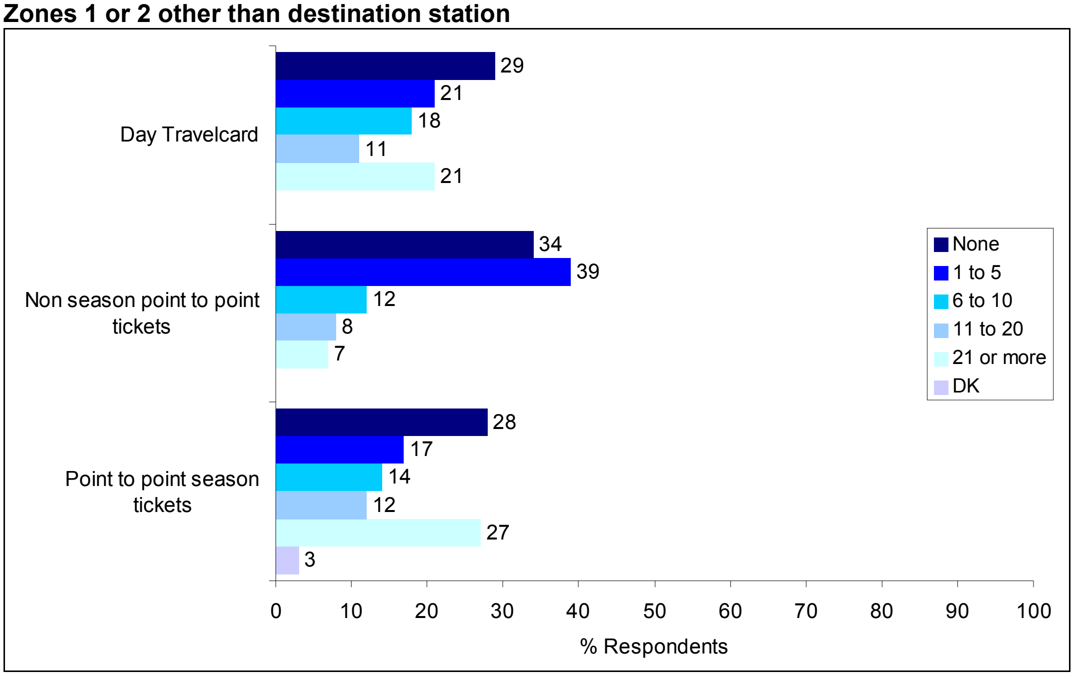
In the last six months six in ten point to point season ticket holders had made 21 or more journeys along the current route, in comparison to almost 4 in 10 (36%) Day Travelcard holders. Just over half (54%) of the non season point to point ticket holders had made between 1 and 5 journeys on this current route.

Figure 7: Number of trips made by train along current route



Across all ticket types three in ten respondents had made no journeys from the origin station into another station in Zone 1 or 2, whilst just over a quarter (26%) had made between one and five. Non season point to point ticket holders were the least likely (7%) to have made 21 or more of these journeys. Figure 8

Figure 8: Number of trips made by train from origin station into any other station in Zones 1 or 2 other than destination station



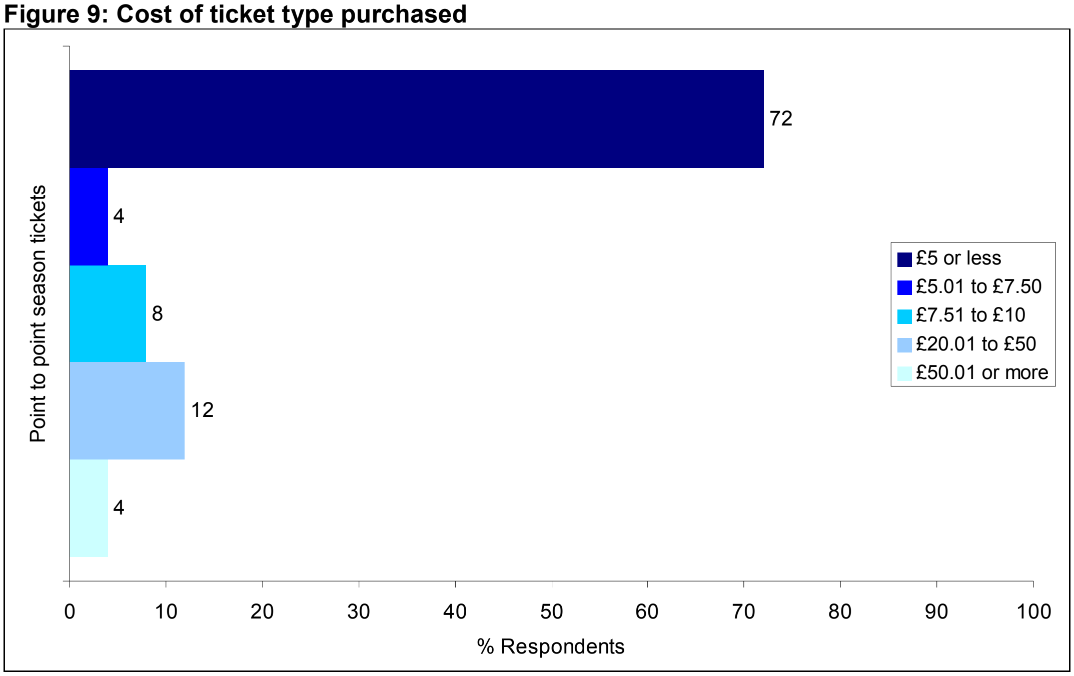
Two thirds of point to point season ticket holders had used no other ticket type in addition to or in conjunction with their season ticket.

For those 25 point to point season ticket holders who had used another ticket type in addition to or in conjunction with their season ticket, this ticket tended to be a Standard Day Return (six respondents), Off-Peak Day Travelcard (four respondents) or a Cheap Day Return (three respondents).

For those seventeen respondents who had purchased more than one ticket the last ticket type purchased was mainly a Standard Day Return (four respondents), a Cheap Day Return (three respondents), a Traintube Return (two respondents) and an Off-Peak Day Travelcard (two respondents).

For point to point season ticket holders the ticket cost for almost three quarter of respondents (72%) was £5 or less.

Figure 9: Cost of ticket type purchased



Respondents were asked how often they use modes other than national rail for travel into Zones 1 and 2. Day Travelcard holders were marginally more likely to use other modes to travel; more than five days a week or to never travel by other modes.

Just over a quarter, 27% of non season point to point ticket holders were most likely to only use alternative modes of transport up to twice a week.

Table 6: Frequency of travel by any other modes

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
5+ days a week	15	16	10	20
3-4 days a week	16	17	22	8

1-2 days a week	18	17	27	9
Between once a fortnight and once a month	6	4	5	9
Less often	17	22	10	20
Never	29	25	26	35
Base	**325**	**101**	**119**	**105**

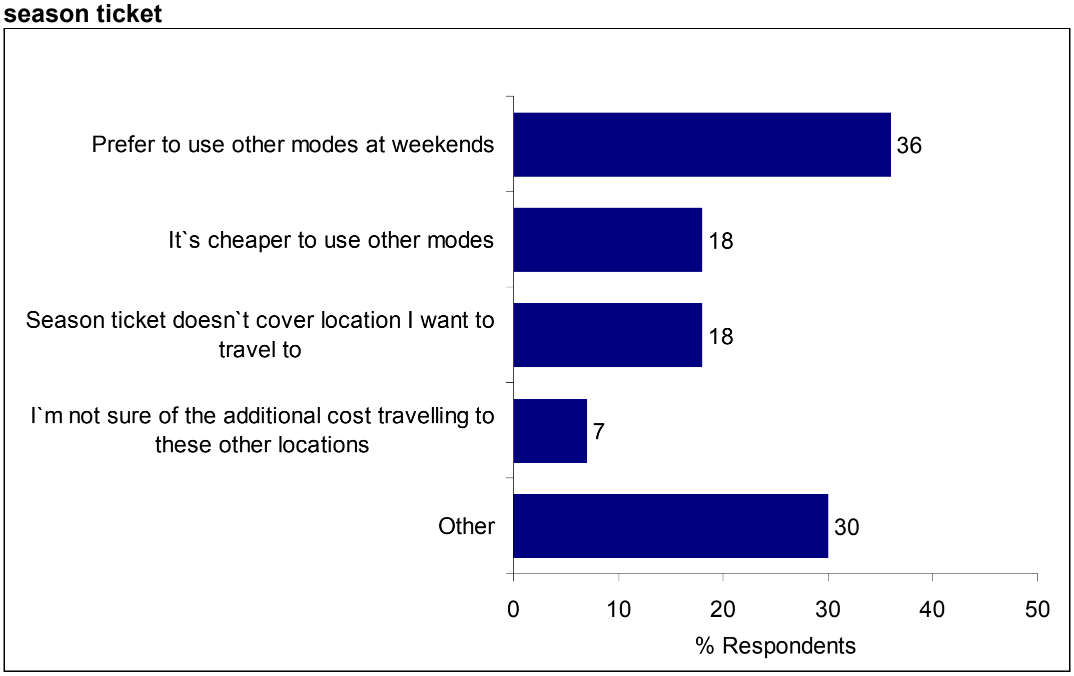
Respondents were then asked how many trips they had made by any mode other than train into Zones 1 or 2 in the last six months. Almost four in ten respondents (38%) stated that they had not made any trips. However, almost a quarter (23%) of point to point season ticket holders had made 21 or more trips in comparison to almost one in ten (9%) for non season point to point ticket holders and almost one in five (18%) of Day Travelcard holders.

Table 7: Number of trips made in the last six months by any mode from origin station into Zones 1 or 2 in Central London

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
0	38	35	37	41
1 to 5	22	18	28	21
6 to 10	14	14	18	10
11 to 20	8	11	7	8
21 or more	16	23	9	18
DK	1		1	2
Base	**325**	**101**	**119**	**105**

To explain their rationale for choosing not to travel by train for these journeys into Zones 1 or 2 in Central London using their point to point season ticket, over a third of these respondents (36%) stated they simply preferred to travel by another mode at the weekend. Almost a fifth stated that they consider other modes to be cheaper with the same proportion stating that their season ticket doesn't cover the location they wanted to travel to.

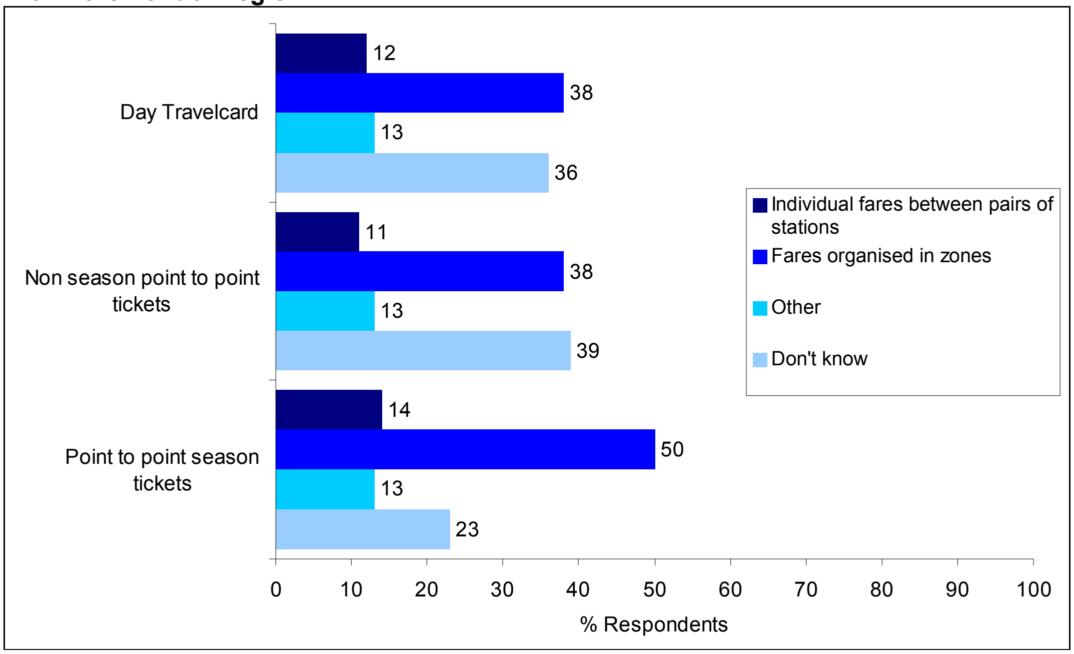
Figure 10: Why respondents chose not to travel by train for these journeys using their season ticket



Fare Structure

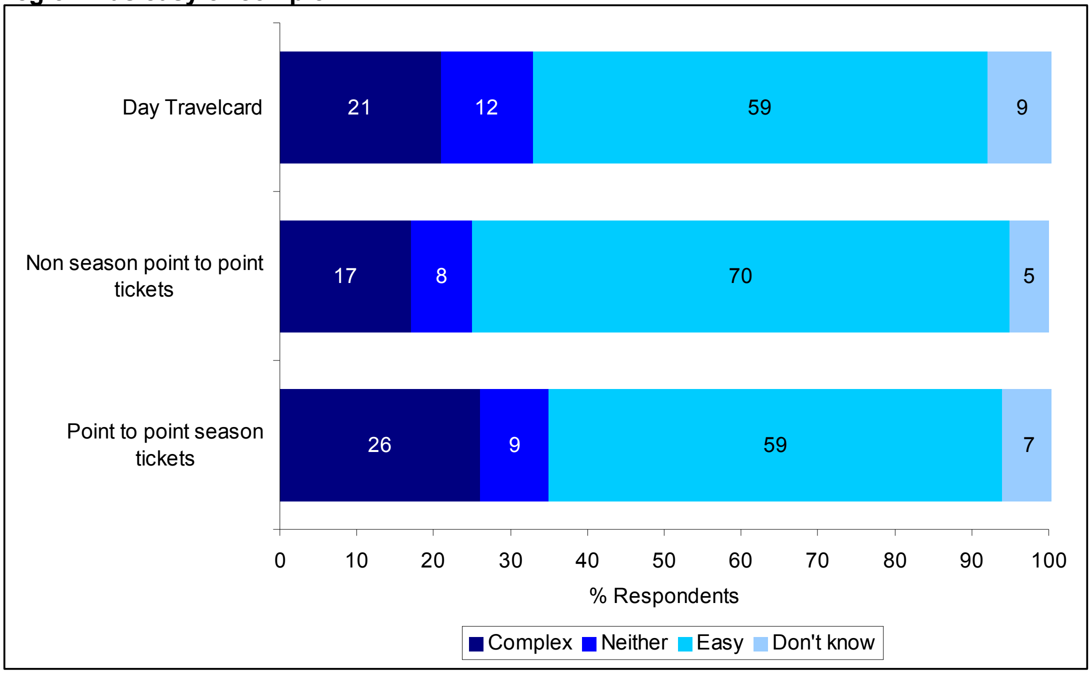
Respondents were asked to describe the current fare structure for overland trains for journeys within the London region. Half of the point to point season ticket holders described the fare structure as being organised in zones, in comparison to just under four in ten (38%) non season point to point ticket holders and Day Travelcard holders. A significant proportion of each sample group could not provide an answer.

Figure 11: Description of the fare structure for overland trains (not tube) for journeys within the London region



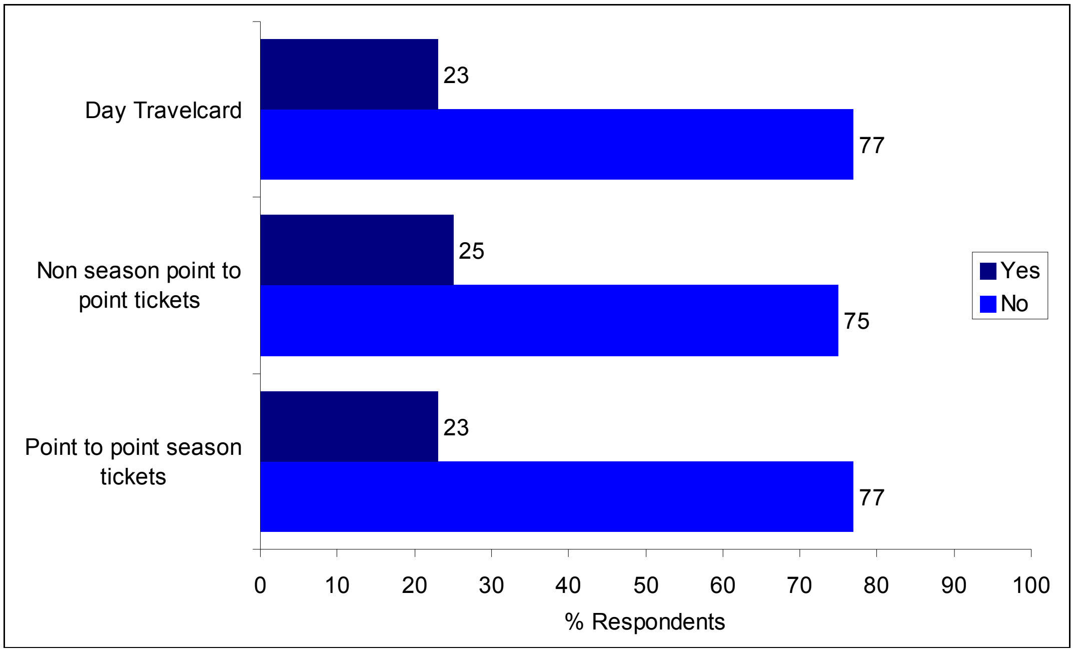
Despite the differing descriptions offered on the current fares structure, two thirds of respondents felt the fare structure within the London region was easy or very easy to understand. Point to point season ticket holders were slightly more likely to feel that the fare structure for overland trains within the London region was complex or very complex (26%), whilst non season point to point ticket holders were more likely to feel it was easy or very easy (70%).

Figure 12: Assessment of whether fare structure for overland trains within the London region was easy or complex



Those who stated that they consider the fare structure to be complex or very complex were asked if this perceived complexity affects the number of train journeys they make into Central London. For just over three quarters of respondents across each of the three ticket types, the complexity of the fare structure did not affect the number of train journeys made into Central London. However, this does mean that almost a quarter consider that the number of journeys is affected by the perceived complexity of the fare structure.

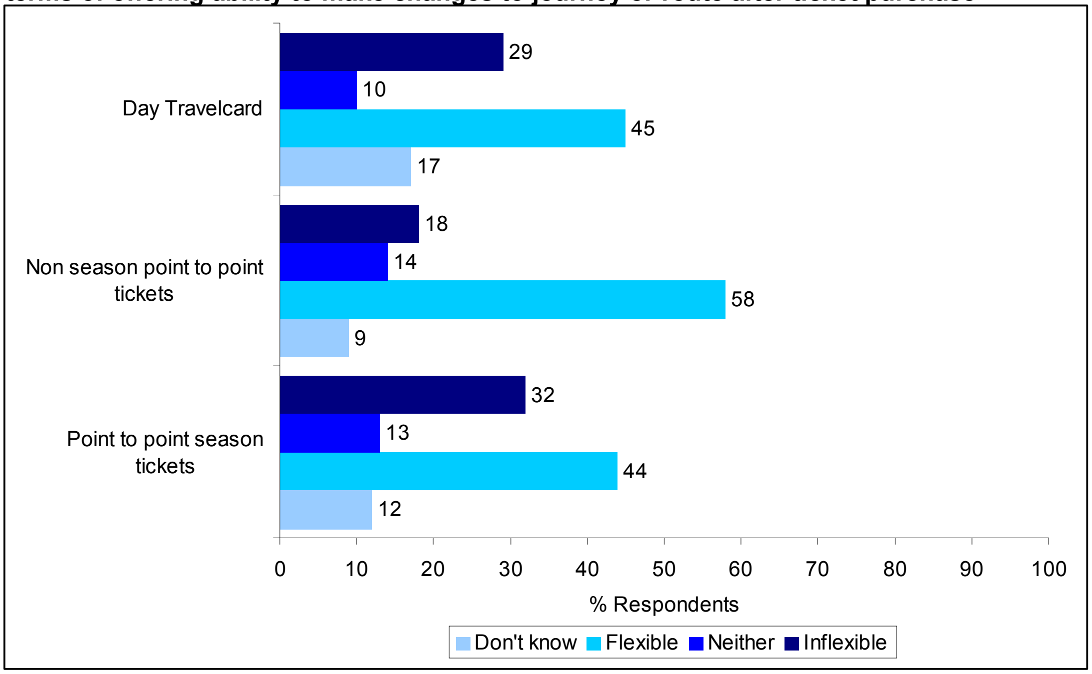
Figure 13: Whether complexity of the fare structure affects the number of train journeys made into Central London



Respondents were asked if they consider the fare structure for trains across London to be flexible or inflexible in terms of offering the ability to make changes to their journey or route after they had purchased their ticket.

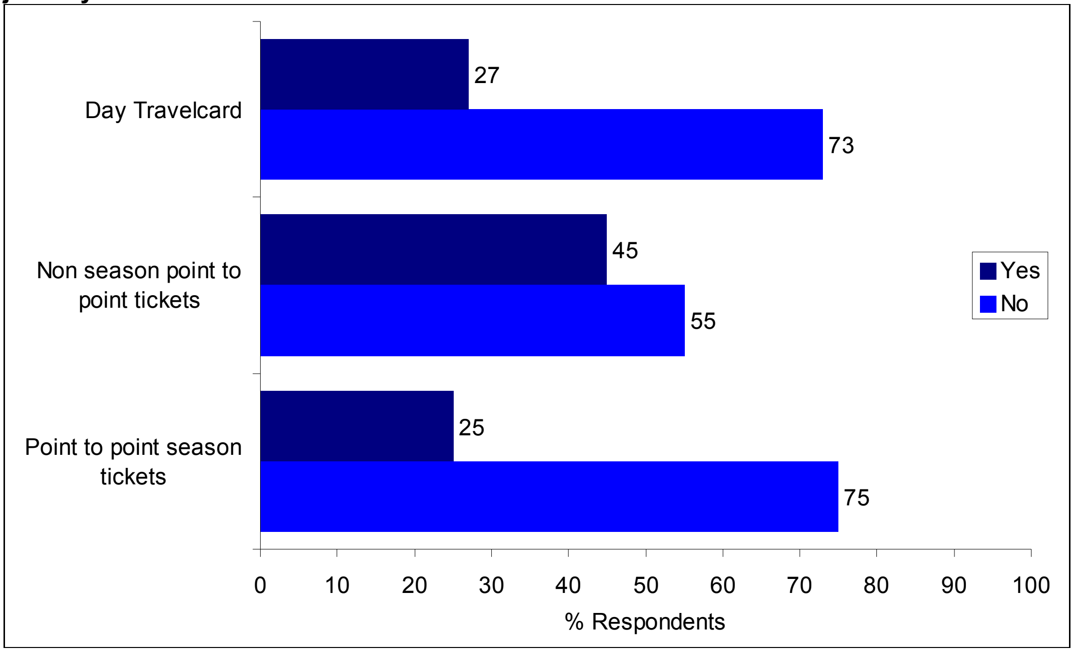
Almost twice as many respondents felt the fare structure was flexible rather than inflexible . Non season point to point ticket holders were most likely to feel that the tickets were flexible (58%) in comparison to 44% of point to point season ticket holders and 45% of Day Travelcard holders. Again, however, over a quarter of Day Travelcard holders and point to point season ticket holders felt the structure was inflexible, 29% and 32% respectively.

Figure 14: Whether fare structure for trains across London is flexible or inflexible in terms of offering ability to make changes to journey or route after ticket purchase



Those who stated that they consider the fare structure to be inflexible or very inflexible were asked if this perceived inflexibility affects the number of train journeys they make into Central London. Just under a third of respondents (31%) felt the inflexible fare structure affected the number of train journeys made into Central London, with non season point to point ticket holders the most likely to feel this way (45%).

Figure 15: Whether the inflexibility of the fare structure affects the number of train journeys made into Central London



Respondents were asked if they felt that the fare structure across London was consistent in terms of offering the same price for similar journeys. Just over a fifth of respondents felt unable to say whether this was the case, (22%). For the remainder almost a half (47%) felt the fare structure across London was consistent. Point to point season ticket holders were the least likely to feel fare structures across London were consistent, with just under four in ten feeling they were consistent (38%), in comparison to just over half, 53% and 54% of the other two ticket type holders.

Table 8: Whether the fare structure across London was consistent in terms of offering the same price for similar length journeys within the region

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Inconsistent	19	19	25	14
Neither	11	16	8	10
Consistent	47	38	53	54
Don't know	22	28	13	26
Base	**325**	**101**	**119**	**105**

Respondents were divided on whether the lack of consistency of the fare structure across London affected the number of train journeys made, with point to point season ticket holders the least likely to be affected by fare consistency issues, (26%).

Table 9: Whether the lack of consistency of the fare structure across London affected the number of train journeys made

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Yes	43	26	50	50
No	57	74	50	50
Base	**325**	**101**	**119**	**105**

The reasons for the impact of the lack of consistency of the fare structure affecting the number of train journeys made into Central London were varied and included thirteen respondents mentioning tickets and travel being 'expensive'.

Asked if they were going to make a train journey to a station they had not travelled to in the past almost six in ten respondents (57%), rising to two thirds of non season point to point ticket holders, stated they would go the ticket office to find out the fare for a train journey. A further 38% of the total sample stated that they would visit a TOC web site. Multiple responses were invited to this question.

Table 10: How respondents making a train journey to a station not previously travelled to would go about finding out the fare

	Total %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Go to ticket office	57	58	66	45
Train company web site	38	48	27	43
Other website	6	8	7	4
Call National Rail enquiries	9	4	8	13
Call some other place	1	2	1	1
Ticket machine	4	1	5	7
Other	4	1	3	7
Base	**325**	**101**	**119**	**105**

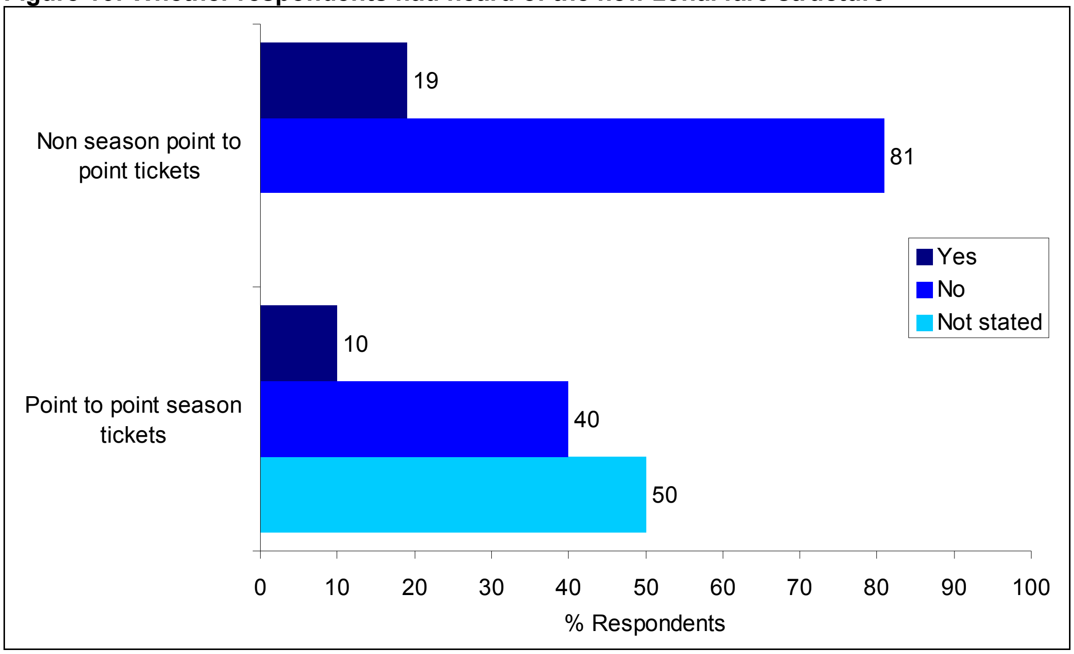
Just over two thirds of respondents felt it was a short time ie 3-4 minutes or less to find out about a new train fare.

Attitudes Towards Zonal Fares

The next section of the questionnaire dealt with zonal fares. Only those travelling on non season point to point tickets were invited to answer these questions. This includes those who ordinarily travel using a point to point season ticket but who had made an additional journey in the past six months using a non season point to point ticket. The results for the following section are shown by those who normally travel with season point to point against those who use non season point to point tickets.

Respondents were firstly asked if they had heard of the new zonal fares structure that was due to come into effect from 2nd January 2007. Few than two in ten respondents had heard of the zonal fares, with non season point to point ticket holders the more likely to have heard of these.

Figure 16: Whether respondents had heard of the new zonal fare structure



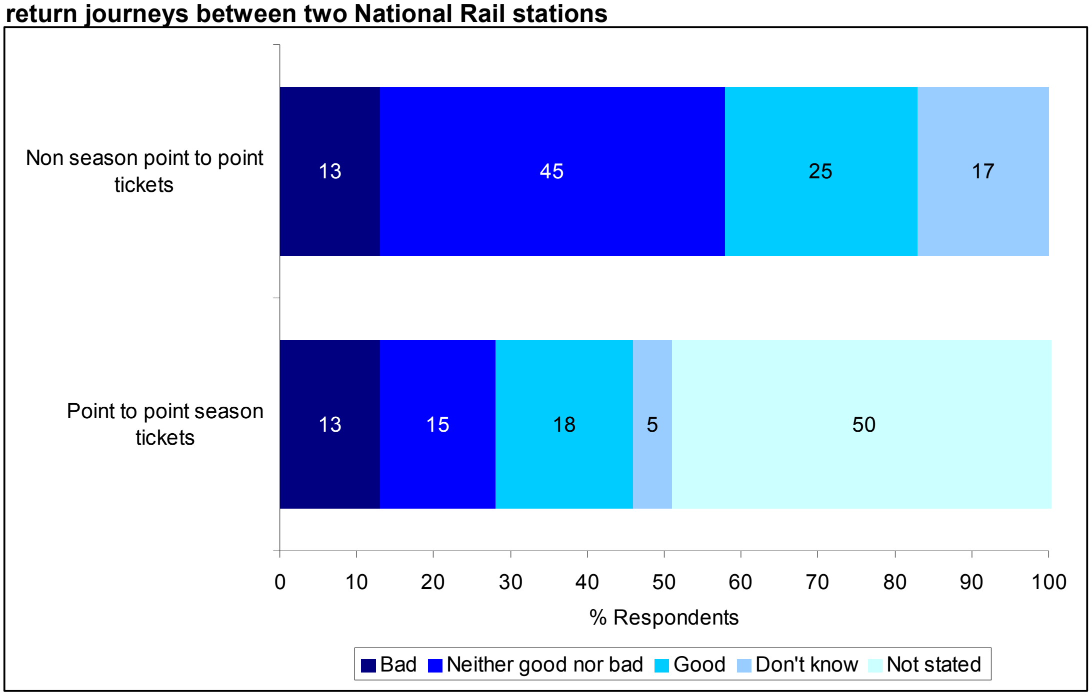
Respondents were provided with a brief description of the intention of zonal fares in terms of a simplified fares structure. The description given was as follows:

"Zonal fares will be a simplified fare for single or return journeys between two National Rail stations. The cost will be the same irrespective of which station you travel from (or to) as long as they are in the same zone. Prior to the introduction of zonal fares the ticket cost would vary depending on the station's distance from the destination station – so a ticket cost would be higher for a station that was further from the destination station than other stations in the same zone."

Respondents were then asked for their opinion on this new structure and what they believed would be the advantages and disadvantages of changing to zonal fares.

Opinion was divided in response to the information that zonal fares would be a simplified fare for single or return journeys between two National Rail stations. Point to point season ticket holders were less likely to consider that this was good (18%) in comparison to a quarter of non season point to point ticket holders.

Figure 17: Reaction to information that zonal fares will be a simplified fare for single or return journeys between two National Rail stations



Almost four in ten respondents (39%) felt there were no advantages to the zonal fare structure, in particular stated by the non season point to point ticket holders (49%). The acknowledged advantages included a simpler fare structure (14%) and ease of understanding (11%).

Table 11: Advantages of zonal fares

	Total %	Point to point season tickets %	Non season point to point tickets %
No advantages	39	10	49
Simpler fare structure	14	15	13
Ease of understanding	11	13	10
Clarity of information	8	8	8
Being able to see cost of travel in advance	8	3	9
Lower fares	8	13	7
Convenience	7	5	8
Reassurance of knowing fares in advance	4		5
Know which ticket type to get	4	3	5
More consistent fares across the region	3	5	2
More flexible fares across the region	3	3	3
Other	6	3	8
Not stated	13	50	
Base	**159**	**40**	**119**

Four in ten respondents (40%) felt there were no disadvantages to the zonal fare structure, in particular stated by the non season point to point ticket holders (49%). The main disadvantage was perceived to be higher fares (21%).

Table 12: Disadvantages of zonal fares

	Total %	Point to point season tickets %	Non season point to point tickets %
No disadvantages	40	13	49
Higher fares	21	18	23
Unfair for short trips across a boundary	13	15	13
Too confusing	7	3	8
Zones are confusing	4	3	5
Less flexible fares across the region	3	3	3
More complex fares across the region	1		1
Less consistent fares across the region	1	3	1
Other	6	3	8
Not stated	13	50	
Base	**159**	**40**	**119**

Trips With/Without Zonal Fares

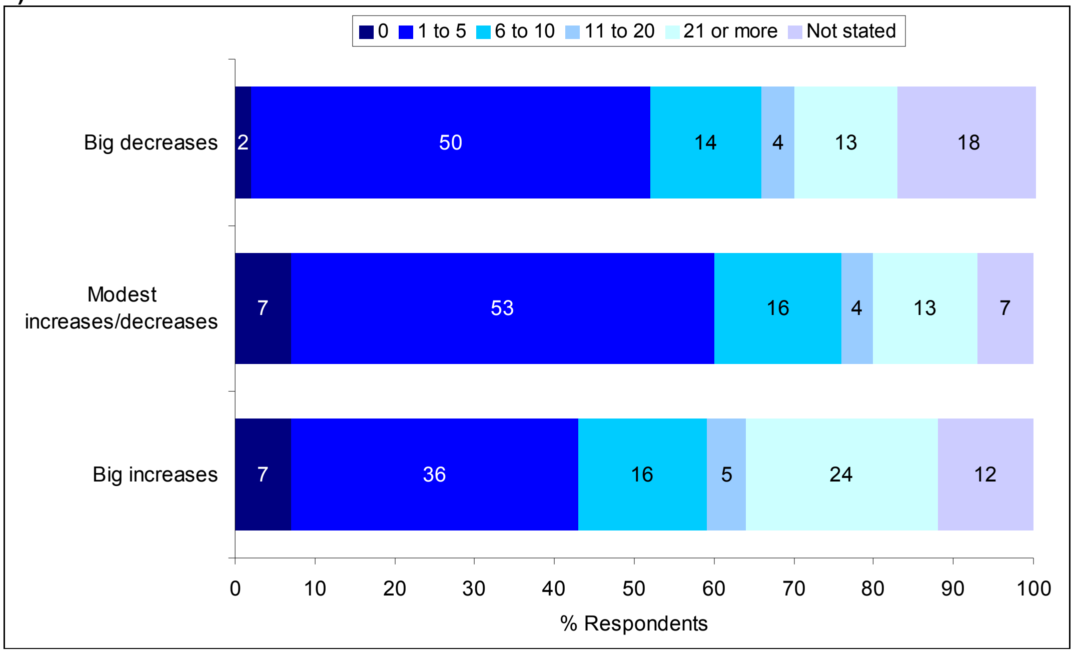
A short series of questions was asked to assess respondent perceptions as to the potential impact zonal fares might have on their travel behaviour.

Firstly they were asked how many trips they would estimate taking into Central London in the next three months if the current fare structure remains in place. The remaining results in this section of user interviews is shown by flows where a big increase in cost is anticipated as a result of the introduction of zonal fares, a modest increase/decrease is anticipated and where a big decrease is anticipated. These flows are as follows:

- Big increases
  - Enfield Lock to London
  - Surbiton to London
  - Orpington to London
  - Hadley Wood to London
  - Romford To London
- Modest change
  - Chadwell Heath to London
  - Norbiton to London
  - Wallington to London
  - New Southgate to London
  - Richmond to London
- Big decreases
  - Worcester Park to London
  - Shortlands to London
  - Goodmayes to London
  - Ilford to London
  - Motspur Park to London

Overall almost half of the sample (46%) predicted making between one and five trips into Central London over the next three months. Almost a quarter of respondents have indicated that they would make up to 21 or more trips in the next three months on route flows that would experience the biggest fare increases, 24%. Just over half, 53%, would make between 1 and 5 journeys on flow routes with modest fare increases/decreases.

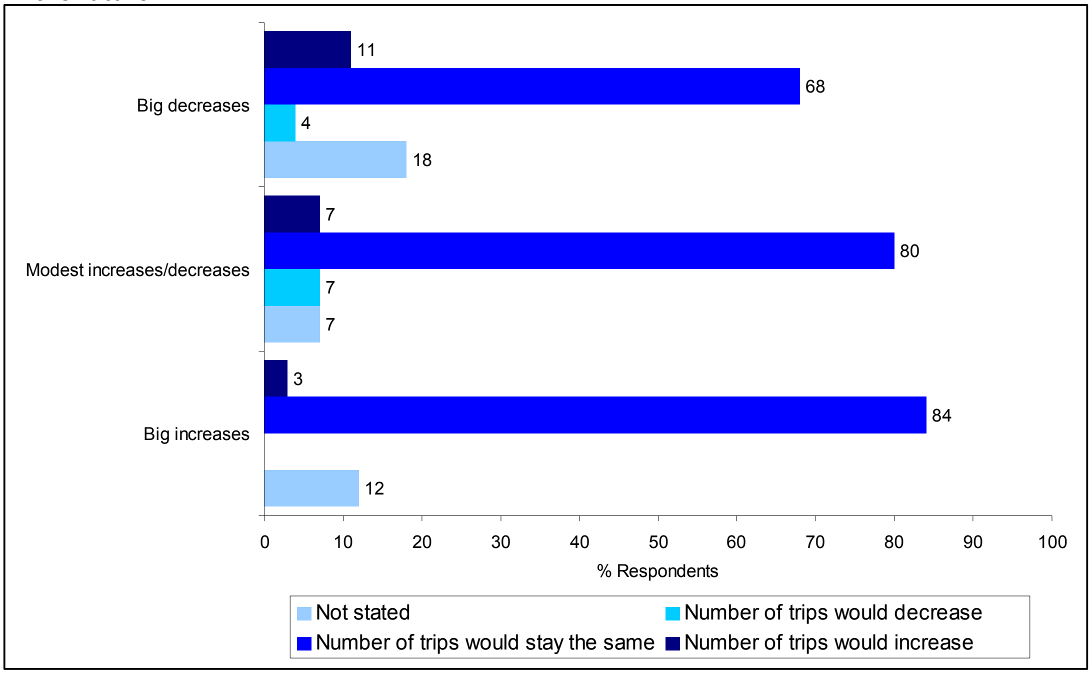
Figure 18: Number of rail trips respondents would make into central London (Zones 1 or 2) in the next 3 months



Respondents were asked what impact zonal fares might have on the number of trips taken into Central London, irrespective of any possible change in the actual price of a ticket.

In terms of the possible impact that zonal fares might have on taking trips into Central London, just over two thirds, 68% of respondents felt that the number of trips would remain the same, rising to 80% and 8%4 for those with big and modest increases/ decreases respectively. One in ten respondents living in areas that would experience big fare decreases were slightly more likely to say that the number of trips would increase (11%).

Figure 19: Impact zonal fares might have on the number of trips to Central London made in the future



Sixteen respondents were asked to estimate the number of trips they would make, with five respondents saying one to five, four respondents stating six to ten and three saying 11 to 20 trips.

Table 13[1]: Number of trips respondents would make

	Total %	Big increases %	Modest increases/decreases %	Big decreases %
0	6			13
1 to 5	31		50	25
6 to 10	25	50	17	25
11 to 20	19			38
21 or more	13		33	
DK	6	50		
Base	**16**	**2**	**6**	**8**

Forecast of Impact of Zonal Fares

Respondents were asked a series of questions regarding the impact that zonal pricing may have on their ticket cost from their current origin into Central London.

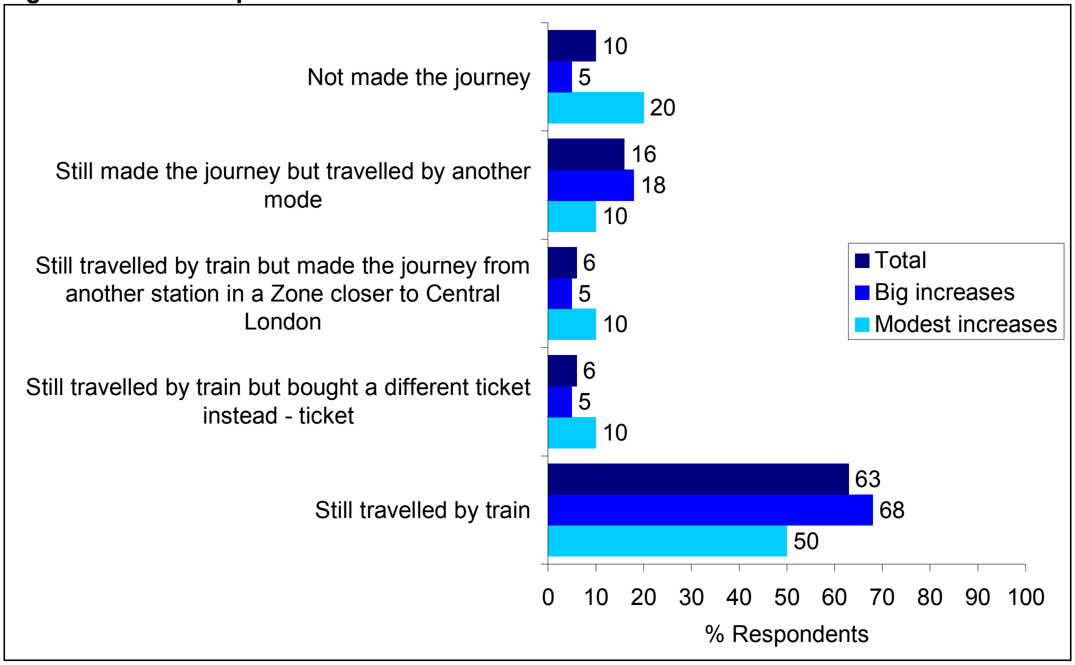
Those travelling from locations where a big or modest increase in fare is anticipated with the introduction of zonal fares were presented with examples of the new fares and asked what they would have done for their current journey if the fare had been as presented.

Two thirds of respondents would have still travelled by train, whilst a sixth stated that they would still have made the journey but travelled by another mode. Some 6% of respondents would have still travelled by train but made the journey from another station in a zone closer to Central London.

Over two thirds of those with big fare increases would still have travelled by train in comparison to half of those with modest increases.

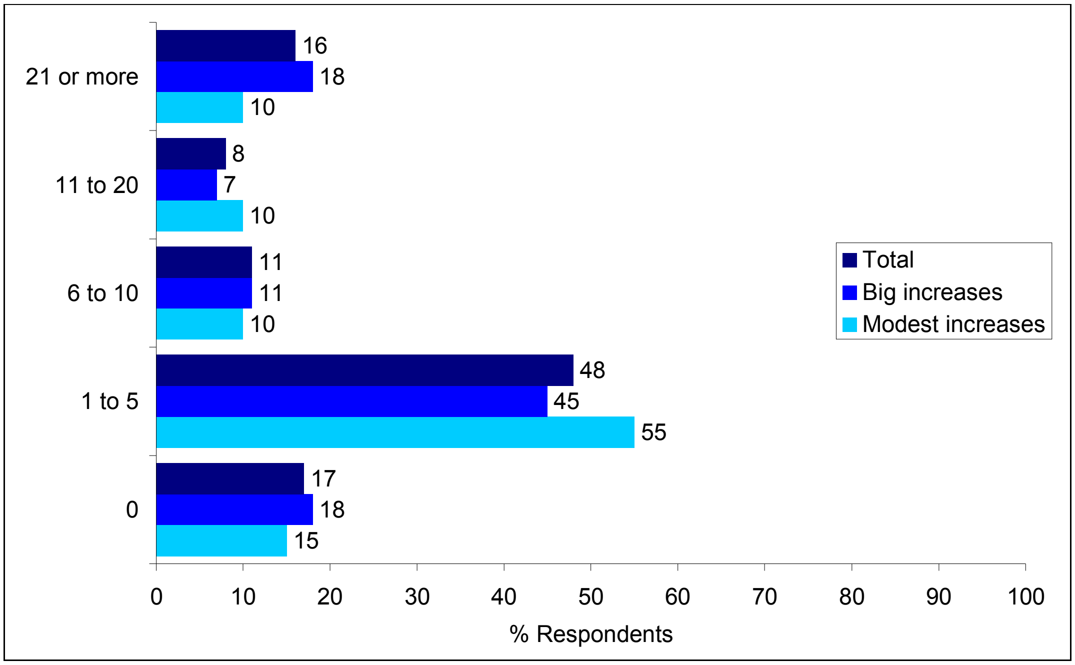
[1] The base here is 16 respondents.

Figure 20: What respondents would do if ticket costs increased



When the ticket cost increases almost half of the respondents (48%) said they would make between one and five trips in to Central London, whilst a sixth said either none or 21 or more. Those with big ticket increases were more likely to say 21 or more trips into Central London (18%) than those with modest increases/decreases (10%).

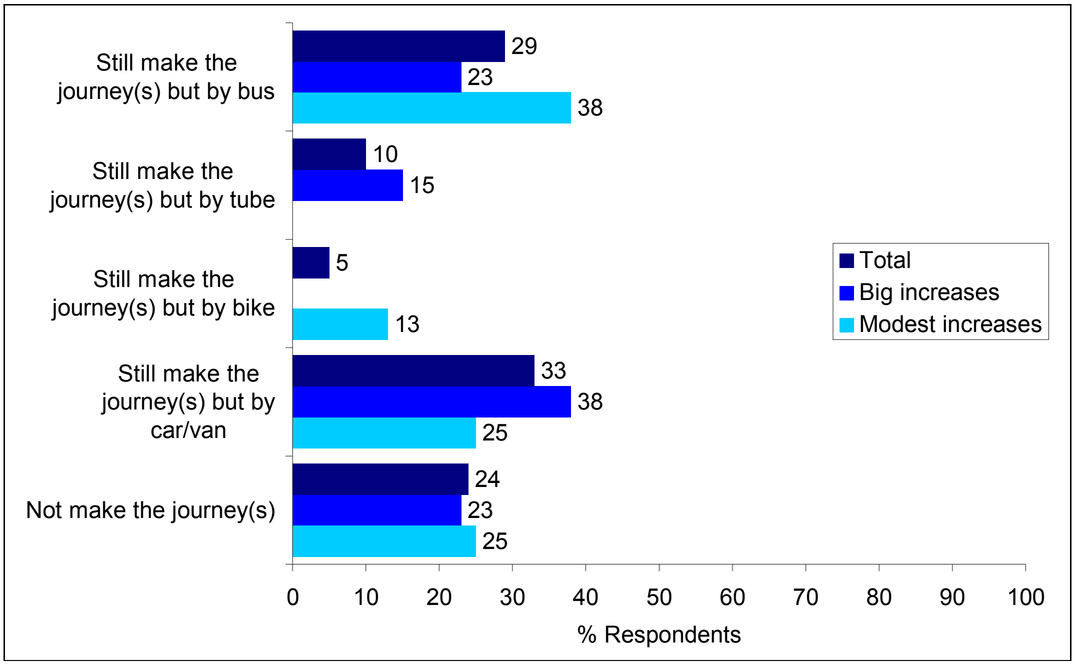
Figure 21: Number of trips that would be made into Central London if ticket cost increased



For those 21 respondents who stated that they would make fewer journeys as a result of the cost impact of the introduction of zonal fares, seven respondents would still make the journey but by car/van, six would still make the journey but by bus and five would not make the journey. Two respondents would now make the journey by tube and one by bus.

Of these 21 respondents, 13 had big fare increases and 8 had modest increases. Those with big increases were more likely to still make the journey but by car/van, whilst for those with modest increases would make the journey by bus.

Figure 22[2]: What respondents would do with the journeys they would no longer take by train

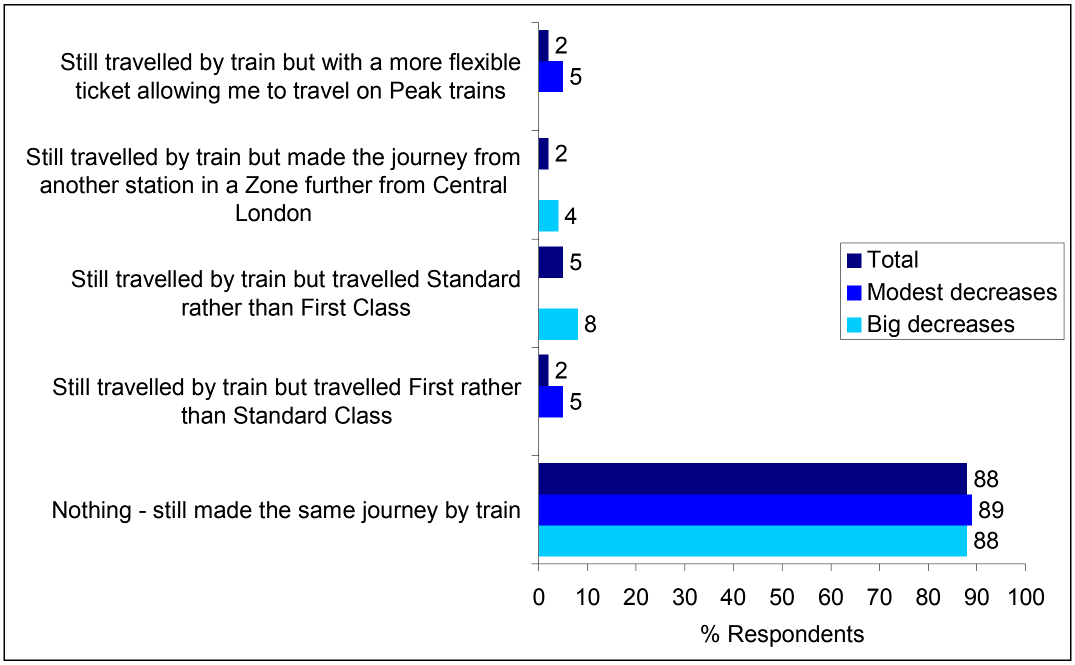


[2] Base here is 21 respondents

Those travelling from locations where a big or modest decrease in fare is anticipated with the introduction of zonal fares were presented with examples of the new fares and asked what they would have done for their current journey if the fare had been as presented.

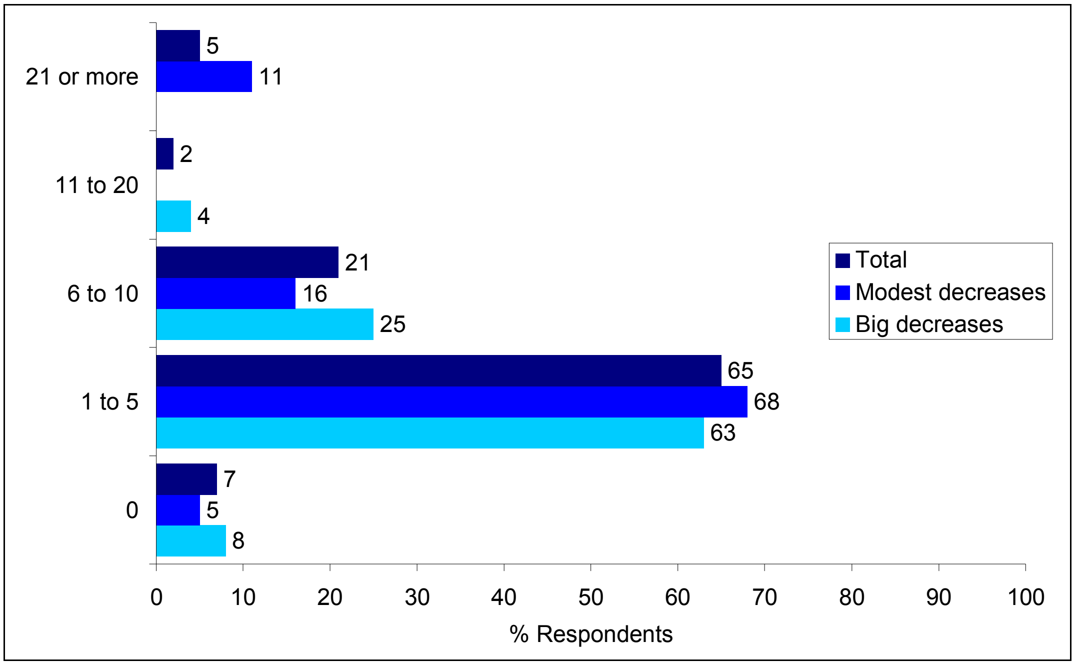
Overwhelmingly, and unsurprisingly, respondents with big decreases and modest decreases stated they would still make the journey by train if the ticket cost decreased.

Figure 23: What respondents would do if ticket cost decreased between this origin and destination



Around two thirds of respondents overall would make between one and five trips into Central London if ticket costs were decreased.

Figure 24:[3] Numbers of trip into Central London respondents would make if ticket cost was decreased

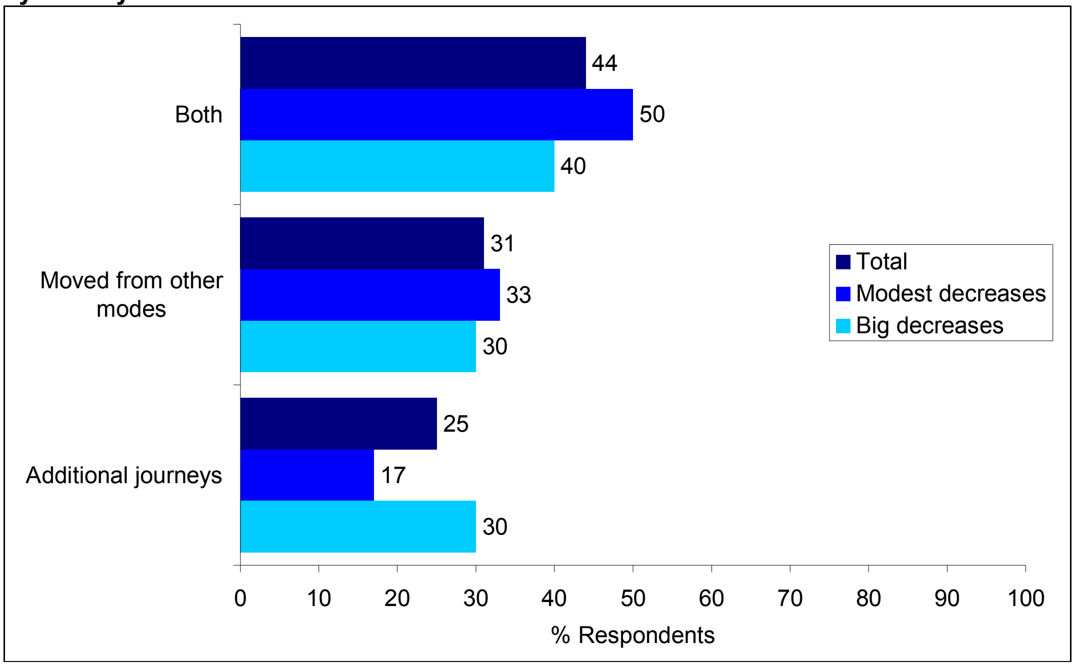


[3] The base here is 43 respondents.

Sixteen respondents estimated that they would undertake an increased number of trips by train in Central London with the introduction of the zonal fares price structure.

These respondents were asked whether these were additional journeys or ones that they would now take by train in preference to other modes. For seven of these respondents they would do both, and for four and five respondents respectively they would make additional journeys or these would be journeys that would have been made using another mode.

Figure 25[4]: Whether respondents would make additional journeys or ones already made by train by far increases/decreases



Only twelve respondents were asked for the modes they would no longer use for these journeys in favour of using the train. Of these 12 respondents,

- 8 said motorbike
- 7 said a bike
- 7 said the bus
- 4 said a car or van
- 3 said the tube.

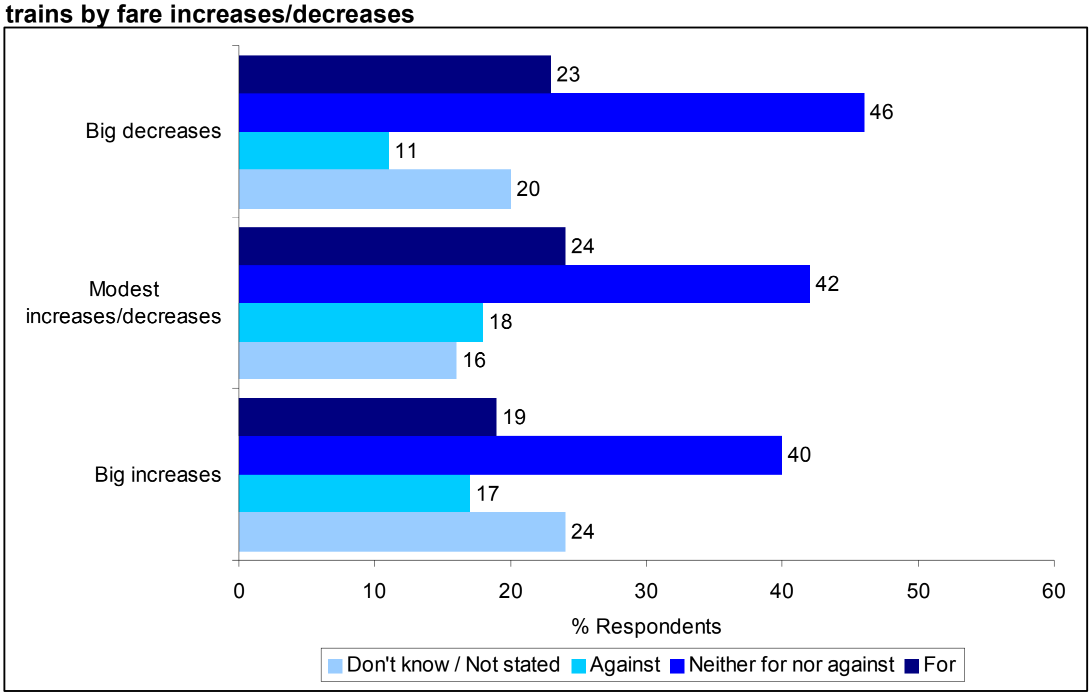
[4] The base here is 16 respondents.

All respondents were asked to comment on whether, having looked at the impact of the simplified fares structure through zonal fares, they were in favour or against the zonal fare levels systems on trains.

Just over a fifth (22%) of respondents were supportive of the zonal fare structure, whereas 15% were against it. Just over four in ten respondents (43%) were neither in favour of nor against it.

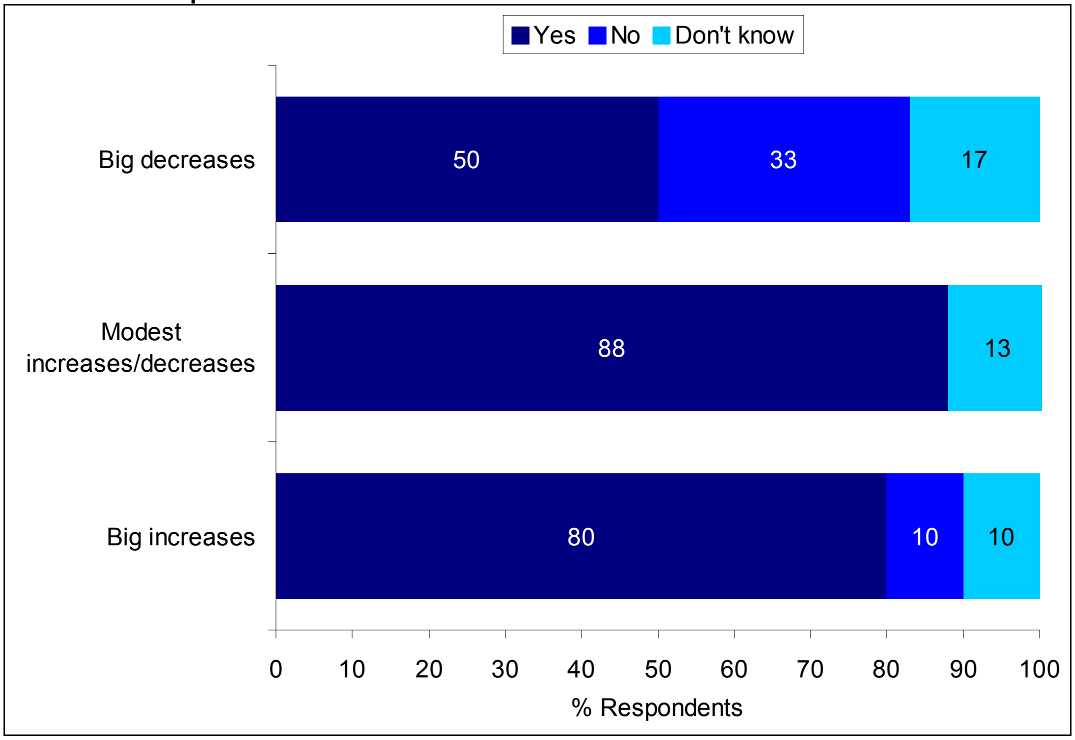
Slightly more of the respondents in areas of big fare decreases (23%) or modest increases/decreases (24%) were in favour of the zonal fare structure, than those with big fare increases (19%).

Figure 26: Whether respondents are in favour or against the zonal fare level systems on trains by fare increases/decreases



Those respondents who said they were against the proposed zonal fares structure were asked if they would prefer to stay with the current point to point fares structure. Three quarters of these respondents expressed a preference for remaining with the fare system in which fares were specific to each start and finish point. This enthusiasm for the current system was more so for those with big increases (eight out of ten respondents) and modest increases/decreases (seven out of eight respondents) than for those with big decreases (three out of six respondents).

Figure 27[5]: Preference for remaining with the system in which fares are specific to each start and finish point



Comments were made by six respondents as to why they preferred to stay with a point to point fare system and included:

- I am against the price increases of 35%
- I know what my expenditure will be each time I travel
- I think it is a fair and equitable way for charging for travel
- It's a fair system for determining the cost of how many miles you travel
- Way too expensive
- Yes as long as it works. It is hard to understand at the moment.

[5] Please note the base is 24 respondents.

Those respondents who said they were against the proposed zonal fares structure were asked if they considered this new structure to be complex or easy. Half of the respondents felt that the zonal fare structure for trains within the London region was complex or very complex.

Table 14[6]: Whether proposed fare structure for trains within the London region was easy or complex

	Total %	Big increases %	Modest increases/ decreases %	Big decreases %
Complex	50	40	63	50
Neither	21	20	25	17
Easy	21	20	13	33
Don't know	8	20		
Base	**24**	**10**	**8**	**6**

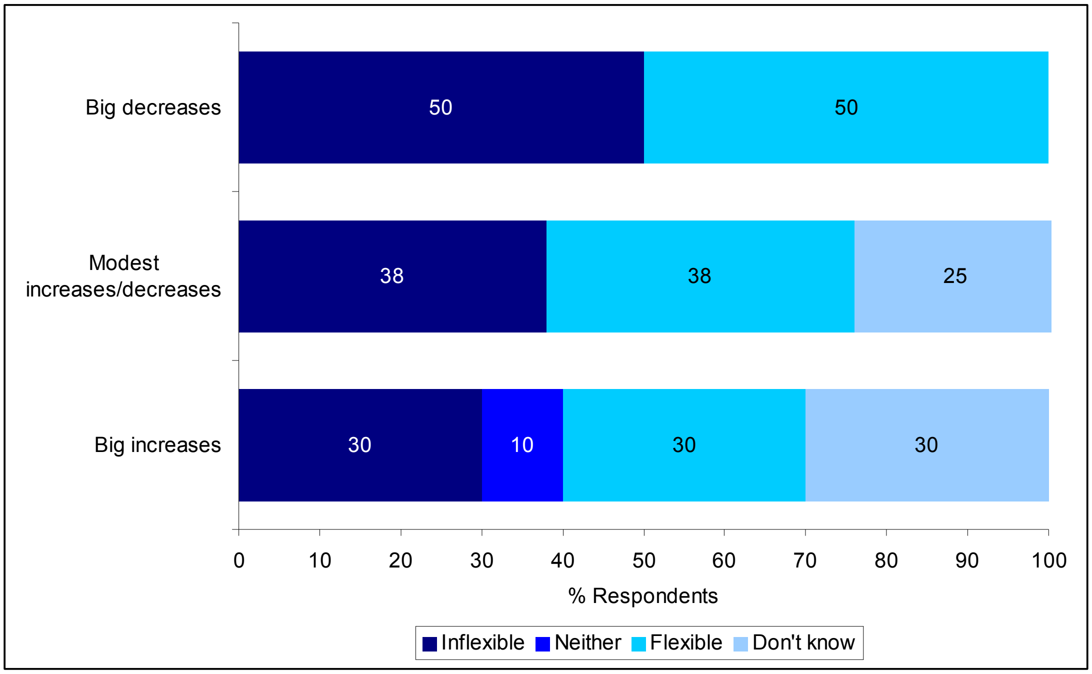
Twelve respondents were asked whether the proposed zonal fare structure affected the number of train journeys respondents would make into Central London. Of these ten respondents felt it would not affect the number of train journeys they would make into Central London. One respondent said it would mean they would not go into Central London as often.

[6] Please note the base is 24 respondents.

The 24 respondents were also asked whether the proposed zonal fare structure for trains across London was flexible or inflexible in terms of offering the ability to make changes to the journey or route after ticket purchase.

There was an even split here with nine respondents stating the zonal fare structure was flexible and nine stating it was inflexible/very inflexible, and this was true irrespective of the fare increase or decrease level.

Figure 28[7]: Whether the proposed zonal fare structure for trains across London was flexible or inflexible in terms of offering the ability to make changes to the journey after ticket purchase

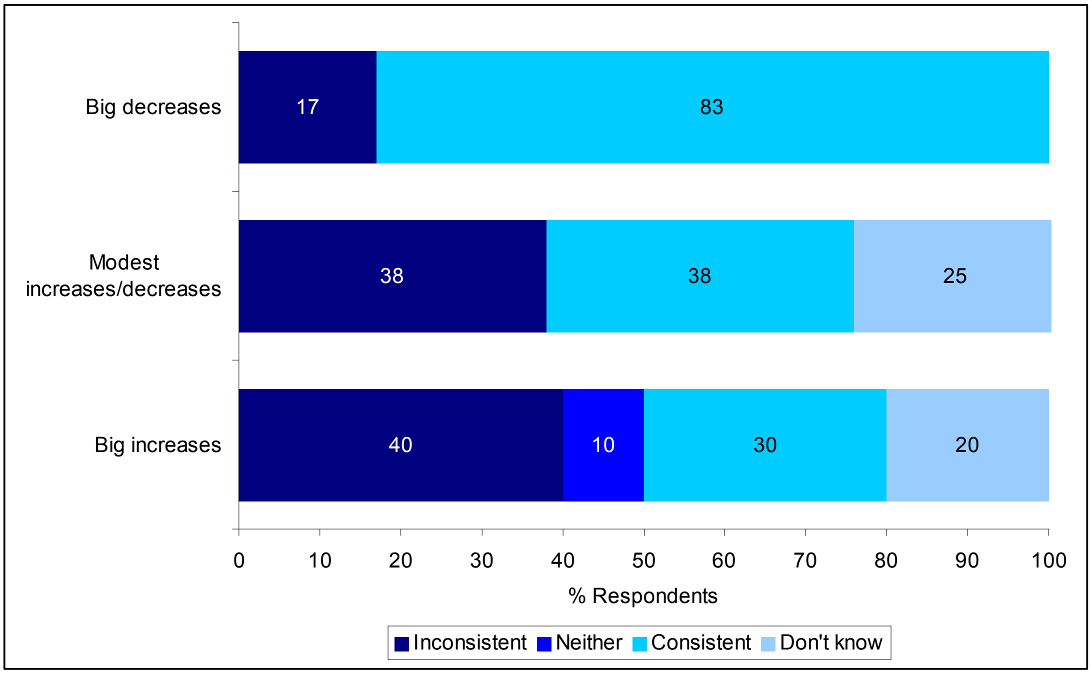


Nine respondents were therefore asked whether the inflexibility of the zonal fare structure across London will affect the number of train journeys made into Central London and of these respondents seven stated that it would not. For two respondents this would mean cutting down on social engagements, as they have to get to work, and decreasing the number of journeys made.

The 24 respondents were asked whether the proposed zonal fare structure across London was consistent in terms of offering the same price for similar length journeys within the region. Almost half (11 respondents) felt the fare structure was consistent, with eight finding it inconsistent.

Figure 29: Whether the proposed zonal fare structure across London was consistent in terms of offering the same price for similar length journeys within the region

[7] Base here is 24 respondents.

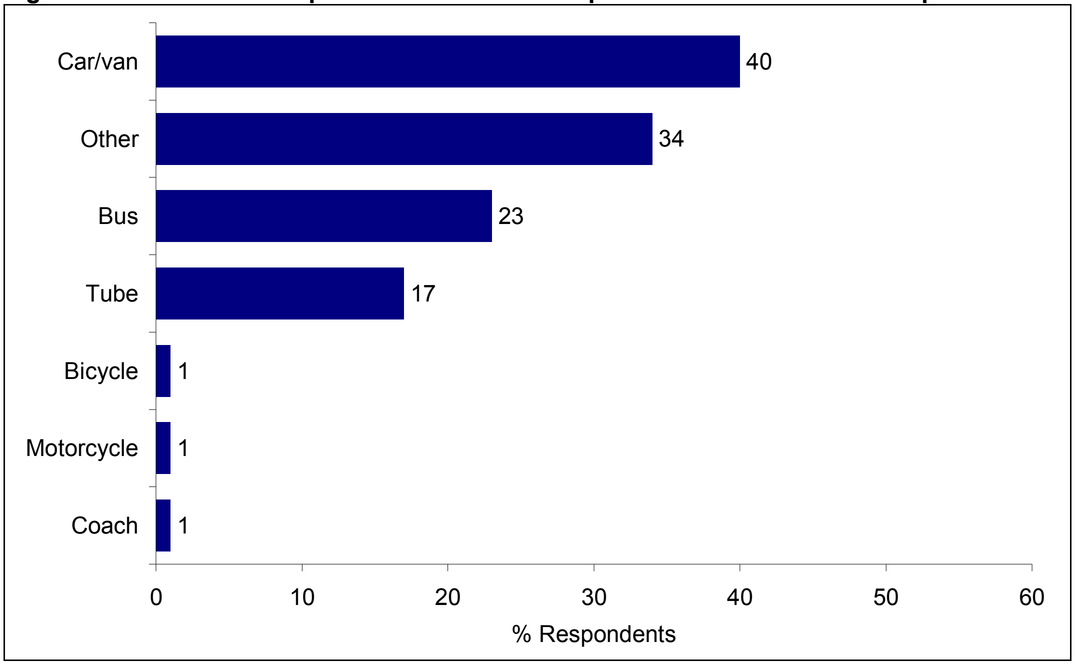


3.4 Of the eight respondents who found the zonal fare structure inconsistent, five felt this would not affect the number of train journeys made into Central London. Two respondents said they would cut down on their travel. Findings – Non Users

Awareness of Rail to London

Respondents were asked which modes of transport they use for their trips into Central London. The main mode of transport for four in ten non-users was a car/van, followed by bus (23%). "Other" modes were mentioned by 34% of respondents although it is believed that a proportion of these would be by tube.

Figure 30: Modes of transport used for current trips to Central London in the past month



For those respondents who mentioned more than one mode, a subsequent question was asked to ascertain the main mode used. The mode used most frequently was the car/van. There were only 22 respondents who were asked this question.

Respondents were asked why they do not use the train for their trips into Central London. Those who provided more than one response where asked for their main reason.

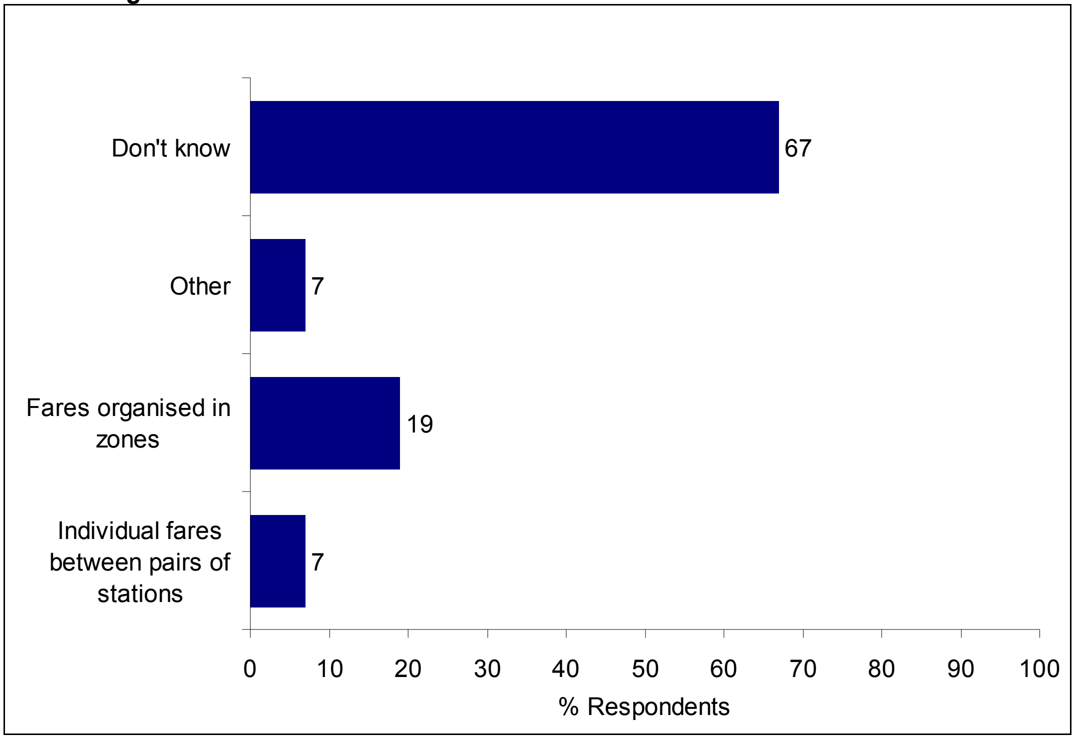
15% of respondents stated that the train is not a viable option for their journey, with 12% stating that this is the main reason. Ticket cost and distance to/from the station was mentioned by a further 13% of all respondents with 11% stating that these were the main reasons. Fares structure was mentioned by just 1% of the total sample with no-one claiming that this was the main reason for not taking the train.

Table 15: Reasons for and main reason for not using the train

Reason	All reasons for not using train %	Main reason for not using train %
Not a viable option for the journey	15	12
Cost of the ticket	13	11
Distance to/from station	13	11
Total time taken for the door-to-door journey	5	3
Destination not served by a train line	5	5
Too much hassle/takes too much organising	4	3
Too many delays	4	3
Trains are too crowded	3	1
Lack of comfort on-board	3	
Concerned about personal safety on-board trains or at stations	2	1
Fares structure	1	
Disabled/too old	1	1
Poor provision of information about the train service (such as train times)	1	1
Other	30	26
Not stated	19	21

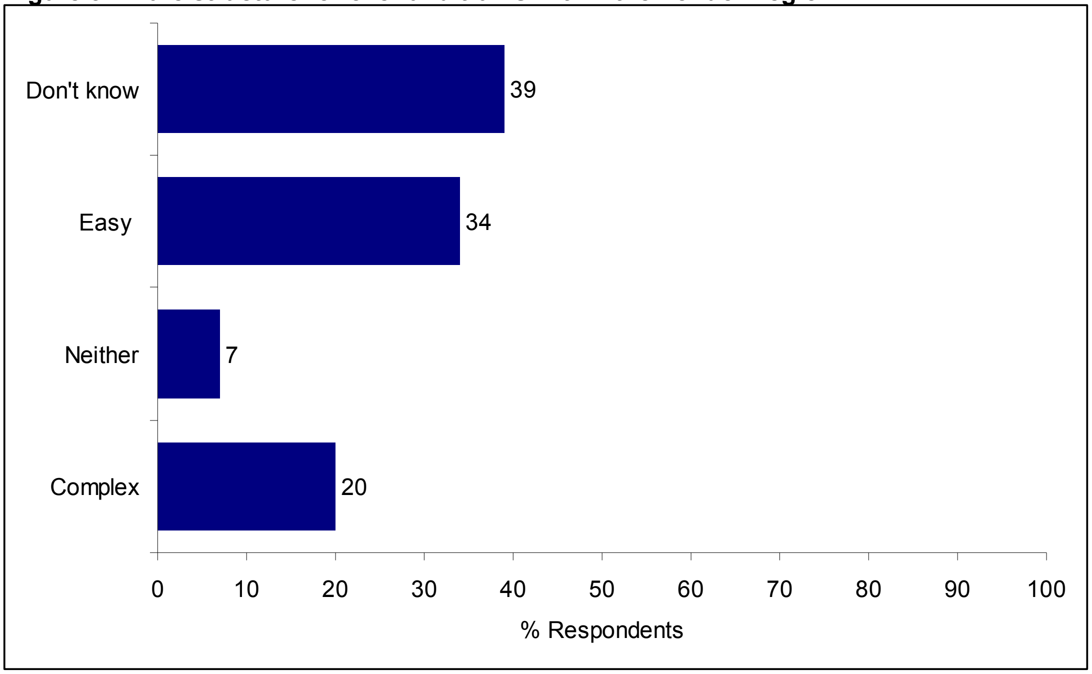
When asked to do so, two thirds of non users were unable to describe the fare structure for overland trains for journeys within the London region. Of the remainder, almost one in five said 'they were fares organised in zones', 19%

Figure 31: Description of the fare structure for overland trains for journeys within the London region



A third of non users considered the fare structure for overland trains to be easy or very easy, with a fifth considering them to be complex or very complex.

Figure 32: Fare structure for overland trains within the London region



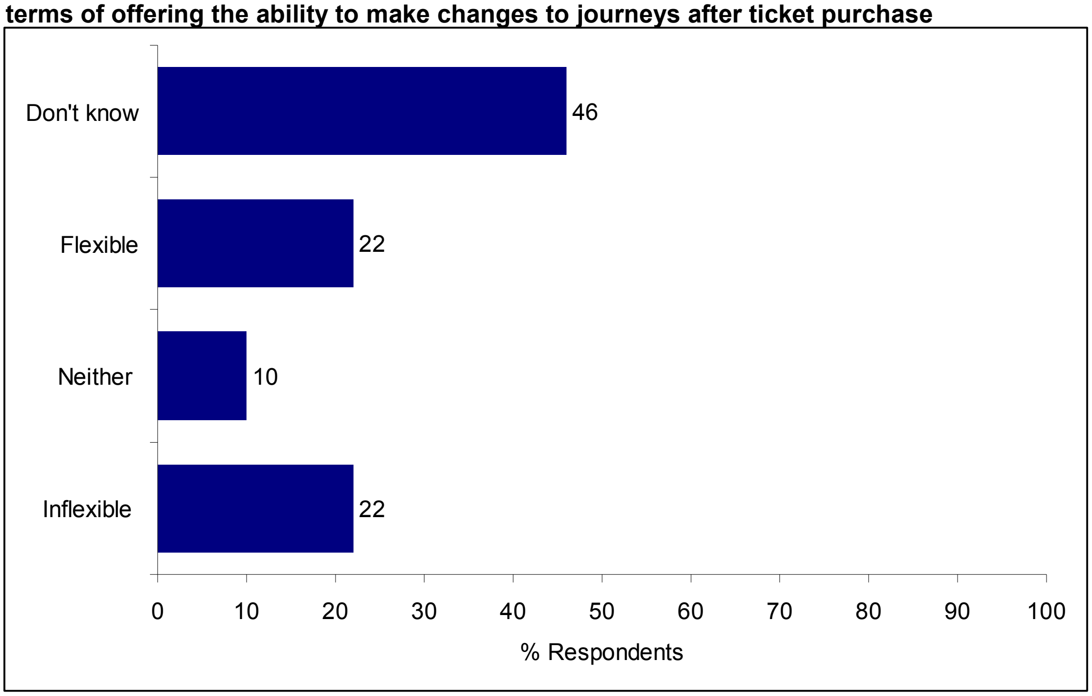
Those 30 respondents who felt that the fare structure for trains is complex or very complex were asked what impact this has on their decision upon modal choice for journeys into Central London. Just over half of these non users felt that the complexity of the fare structure affected their decision on modes to be used for journeys into Central London.

In terms of the way that the complexity of the fare structure affected their decision on travel mode for journeys in to Central London six respondents said:

- because it is time consuming. It takes a long time considering which is the cheapest way to get from A to B
- depends on the zone. It is a different fare passing through a zone
- difficult to find information
- don't understand the fares and so just drive
- just want to get the quickest route
- takes too much time (to understand).

Non users were then asked whether they consider the current train fares structure to be flexible or inflexible. Almost half felt unable to answer this question. Those who did offer an opinion were equally likely to consider the fare structure to be flexible as inflexible in terms of offering the ability to make changes to journeys after ticket purchase.

Figure 33: Whether fare structure for trains across London was flexible or inflexible in terms of offering the ability to make changes to journeys after ticket purchase



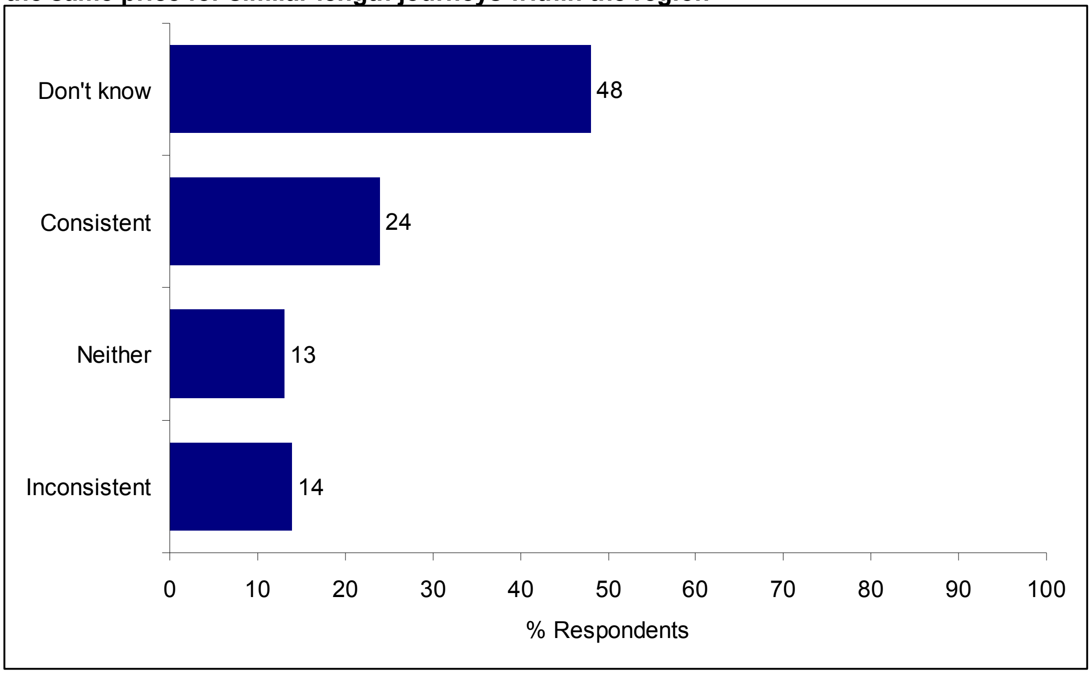
Of the 33 respondents who considered the fares structure to be inflexible or very inflexible, just over half (55%) stated that the inflexibility in the fare structure did affect the decision on modal choice for the journeys made into Central London

This impact on travel mode was noted by five respondents who said:

- it affects me because I use an Oyster card to travel but sometimes I have to spend more money and it affects my connectivity around the city
- it is difficult to use the rail anyway
- it is an equal distance to underground which is more flexible and the trains are every 25 minutes
- I can get tubes every 5 minutes, whilst mainline trains come one every hour
- that more planning was now required.

Non users where then asked whether they consider the current train fares structure was consistent in terms of offering the same price for similar length journeys within the region. Again, almost half felt unable to answer this question. Almost a quarter of non users (24%) felt the fare structure was consistent in terms of offering the same price for similar length journeys within the region, whilst 14% felt it was inconsistent.

Figure 34: Whether the fare structure across London was consistent in terms of offering the same price for similar length journeys within the region



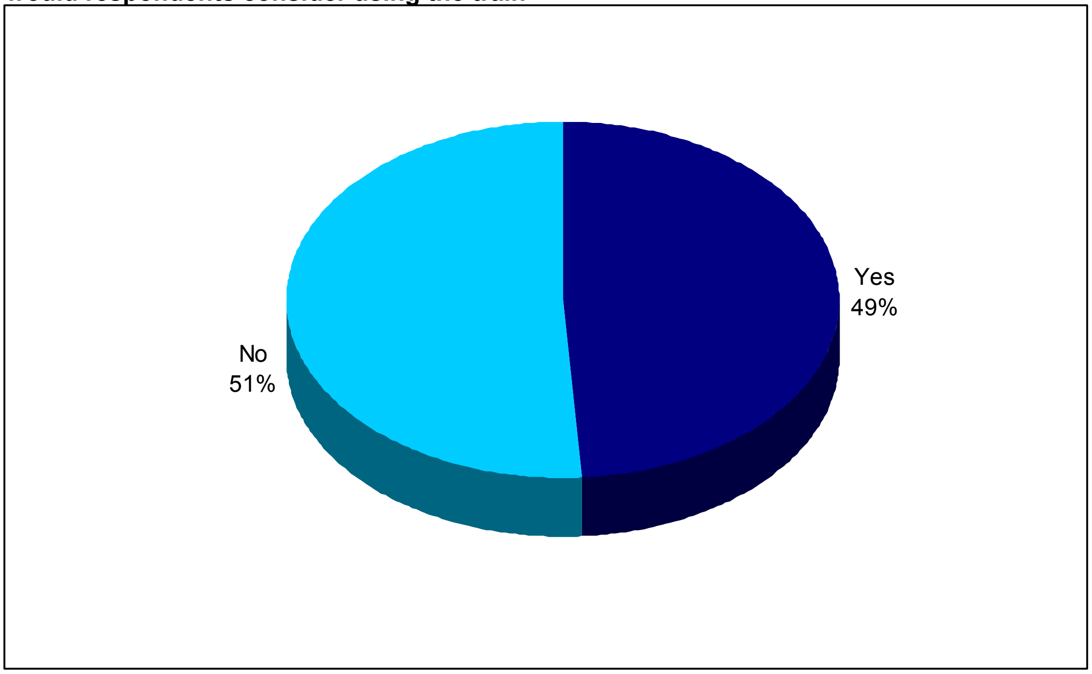
The twenty-one respondents who felt it was inconsistent were split in terms of whether it affected their decision on the mode used for journeys into London, with 10 responding that it did and eleven stating it did not.

For those whose decision were affected for six respondents this included:

- respondent can travel around London on a base price
- different prices for same lengths
- it is expensive
- will find an alternative mode
- the price
- puts off using transport altogether as there are so many prices.

Respondents were asked that if their main barriers to using the train were addressed whether they would ever consider using the train for any of their trip into Central London. In response, 49% of respondents said 'Yes' and 51% said 'No'.

Figure 35: If reasons for not using the train for trips into Central London were addressed, would respondents consider using the train

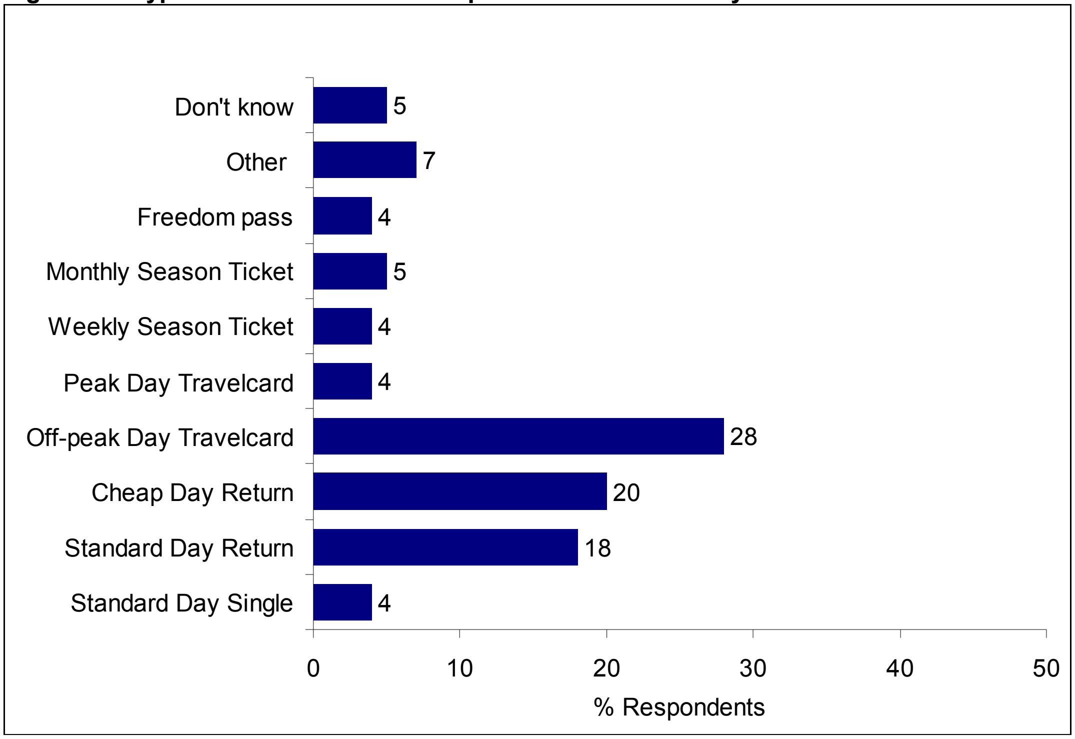


Those who responded in the positive were asked the remaining sections of the questionnaire. The remainder were routed to the characteristics and closing sections of the questionnaire.

Therefore caution should be applied as the sample size for the remainder of this section is 74 respondents.

Those respondents who would consider using train were asked what type of ticket they thought they would purchase for their journey. Almost three in ten respondents (28%) would use an Off Peak Day Travelcard to travel by train into Central London, whilst one in five would use a Cheap Day Return.

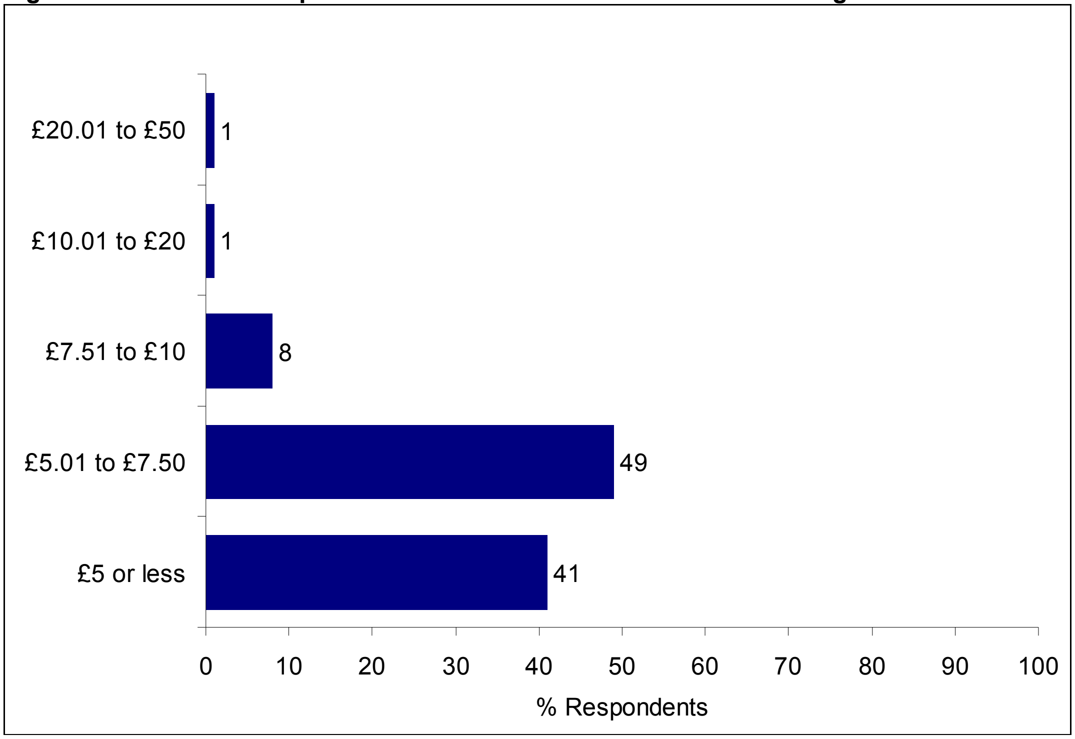
Figure 36: Type of ticket that would be purchased for travel by train to London



Off Peak Fares

Asked to estimate the cost of an off peak return ticket the majority of non users felt that the cost into Central London would be either £5.01 to £7.50 (49%) or £5 or less (41%).

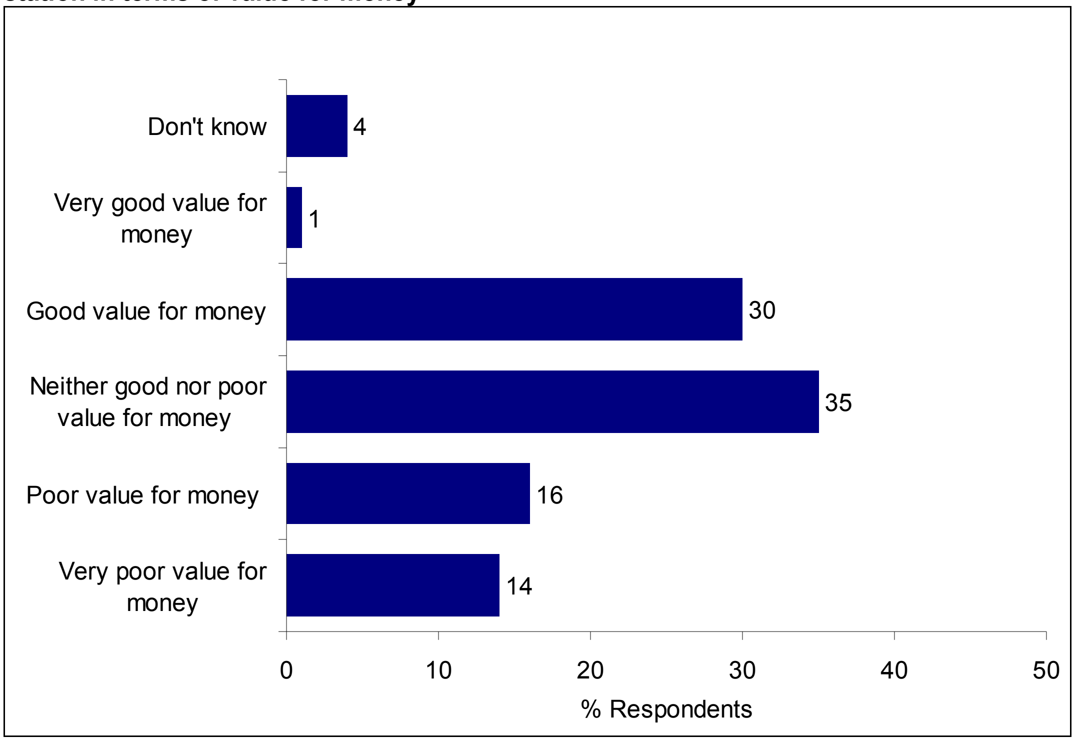
Figure 37: Cost of an off peak return ticket to Central London from origin station



Asked how sure they were that their estimate was correct, just over half (51%) were quite or very sure of their estimate of the cost of an off peak return ticket to Central London from origin station, with nearly a third (30%) quite or very unsure of it.

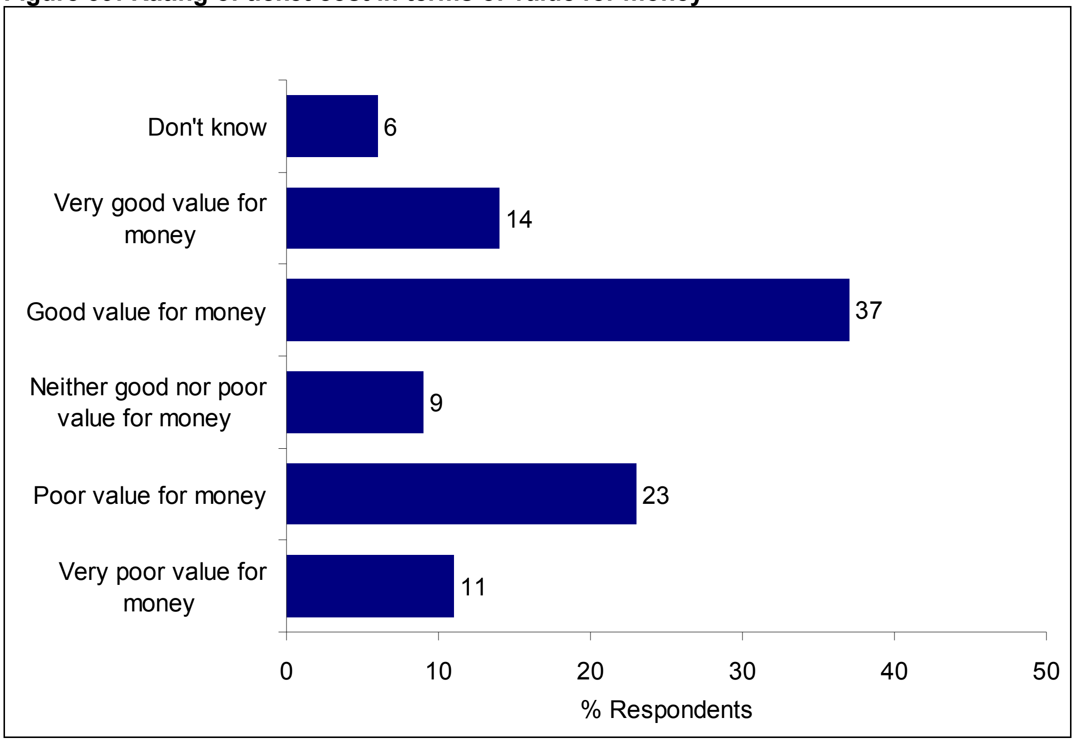
Respondents were asked how they would rate this ticket cost in terms of value for money. Respondents were equally divided between those who considered it to be poor/very poor and those who considered it to be good/very good value for money, with both receiving just under a third of responses.

Figure 38: Rating of cost of an off peak return ticket to Central London from origin station in terms of value for money



Respondents who provided an off peak fare estimate that was higher than the actual off peak fare were then presented with the actual cost (as of 1st January 2007) of an off peak return train ticket to Central London from their origin location. In response to being told this actual fare, approximately half of the respondents now considered it to be good or very good value for money.

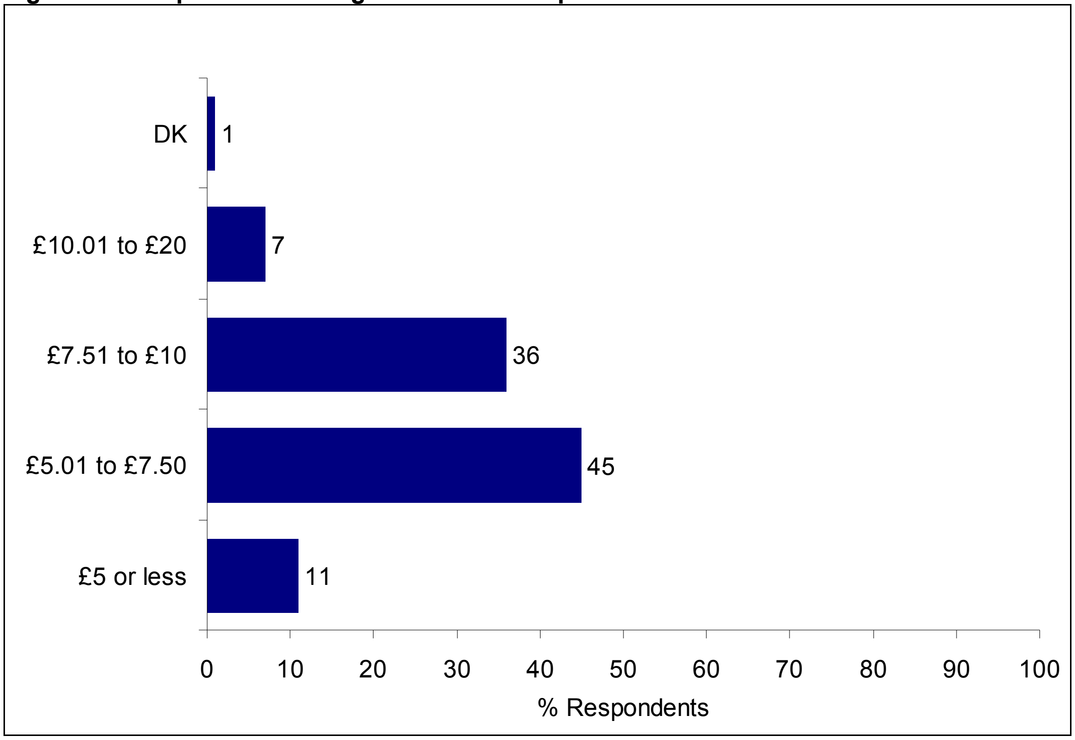
Figure 39: Rating of ticket cost in terms of value for money



Peak Fares

Non user respondents were then asked to provide an estimate for a peak return train ticket into Central London from their original location. Almost half of the respondents (45%) thought it would be between £5.01 and £7.50.

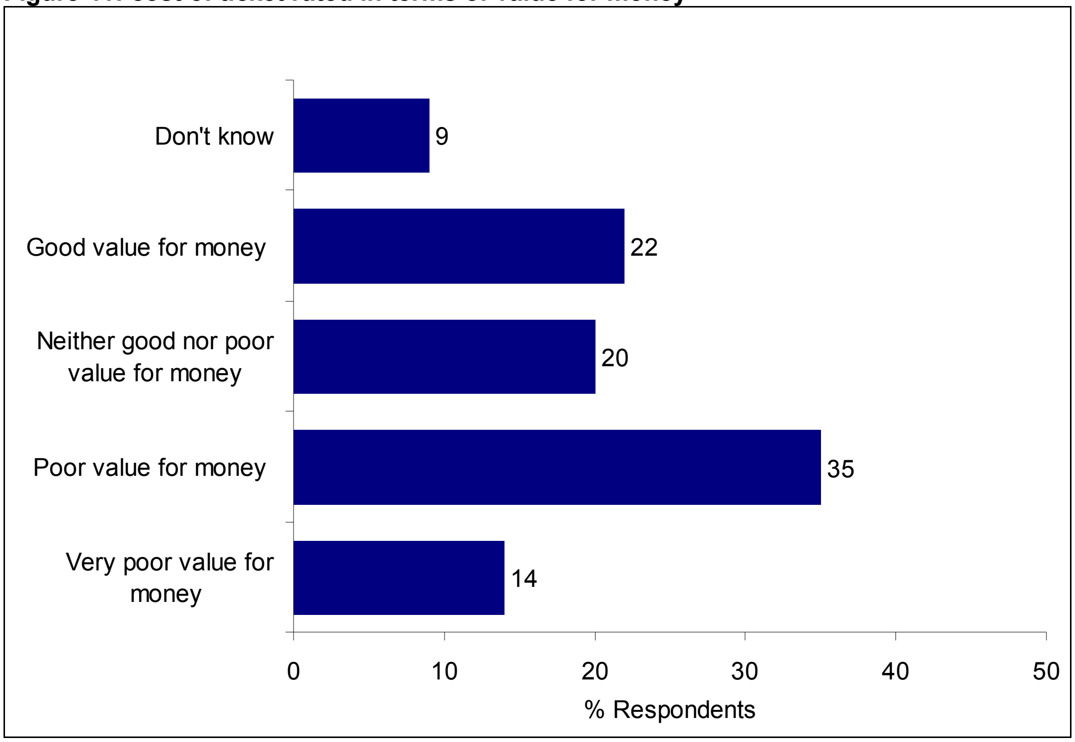
Figure 40: Respondents thoughts on cost of a peak return train ticket to Central London



Around four in ten respondents (41%) were quite unsure/very unsure their estimates were correct, with just under a third quite sure/very sure their estimates were correct.

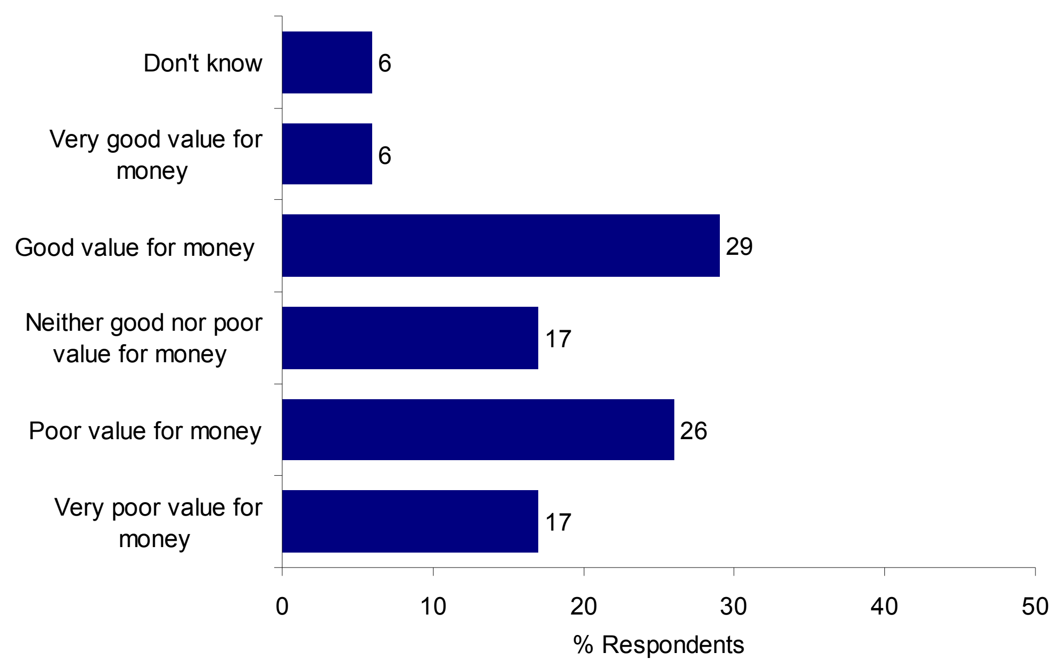
Around half of the respondents considered the ticket to be of poor/very poor value for money, 94% at the estimate cost level, with just over a fifth considering it to be good value for money (22%).

Figure 41: cost of ticket rated in terms of value for money



Respondents who provided a peak fare estimate that was higher than the actual peak fare were then presented with the actual cost (as of 1st January 2007) of a peak return train ticket to Central London from their origin location. After learning of the new fare more respondents considered it to be good/very good value for money (22% increasing to 35%).

Figure 42[8]: Rating of new fare in terms of value for money

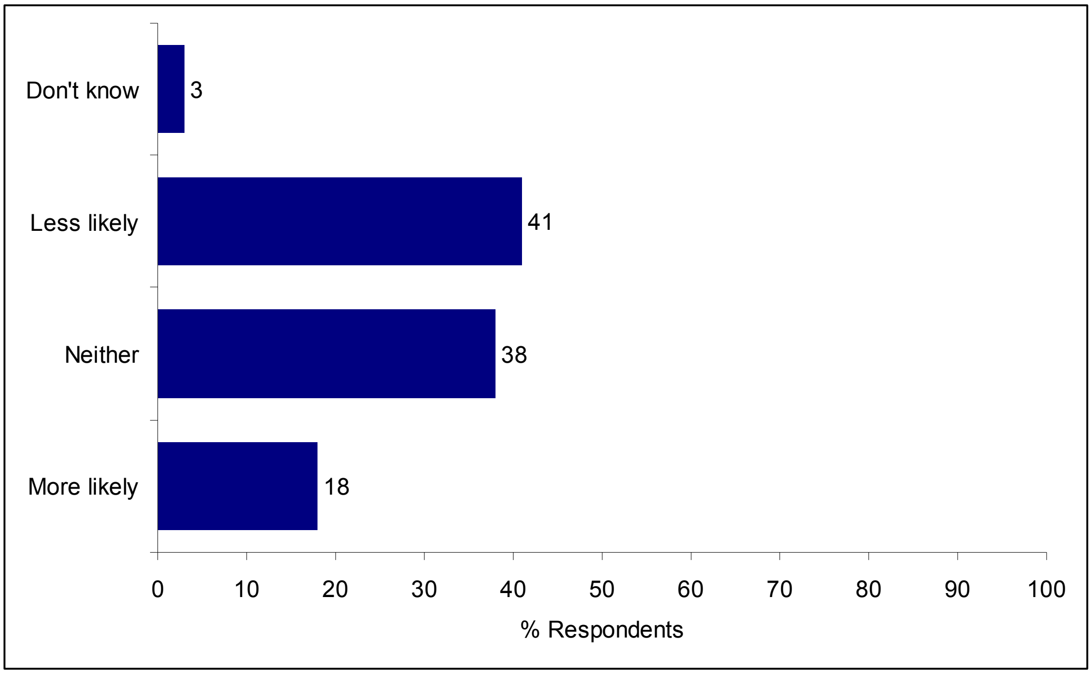


[8]The base is 35 respondents.

Respondents who provided fare estimates that were greater than both the actual peak and off peak ticket costs were asked if they were more or less likely to use rail in future for trips to London. There were 34 of these respondents.

Just over four in ten said they were less likely to use rail for future trips into London.

Figure 43[9]: Likelihood of using rail for future trips into London in the next two months after new fare confirmed



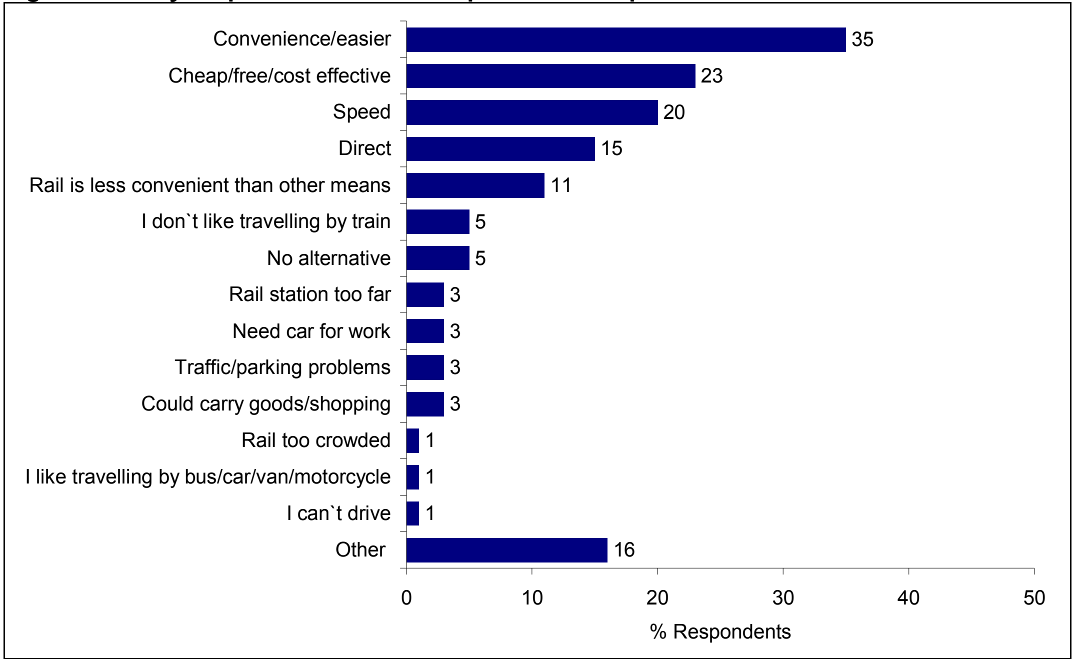
Six respondents were more likely to make trips into London and in the next two months the level of these varied from one respondent saying no trips, two respondents saying 2 trips, 1 respondent saying 4 trips, one respondent saying 6 trips and one respondent saying 40 trips.

[9] Base is 34 respondents.

Journey Planning

Respondents were asked why they used the specific mode of transport for trips from their origin location into Central London. The main reasons for non users using another mode of transport to travel into Central London was convenience/easier (35%), more cost effective (23%) and speed (20%).

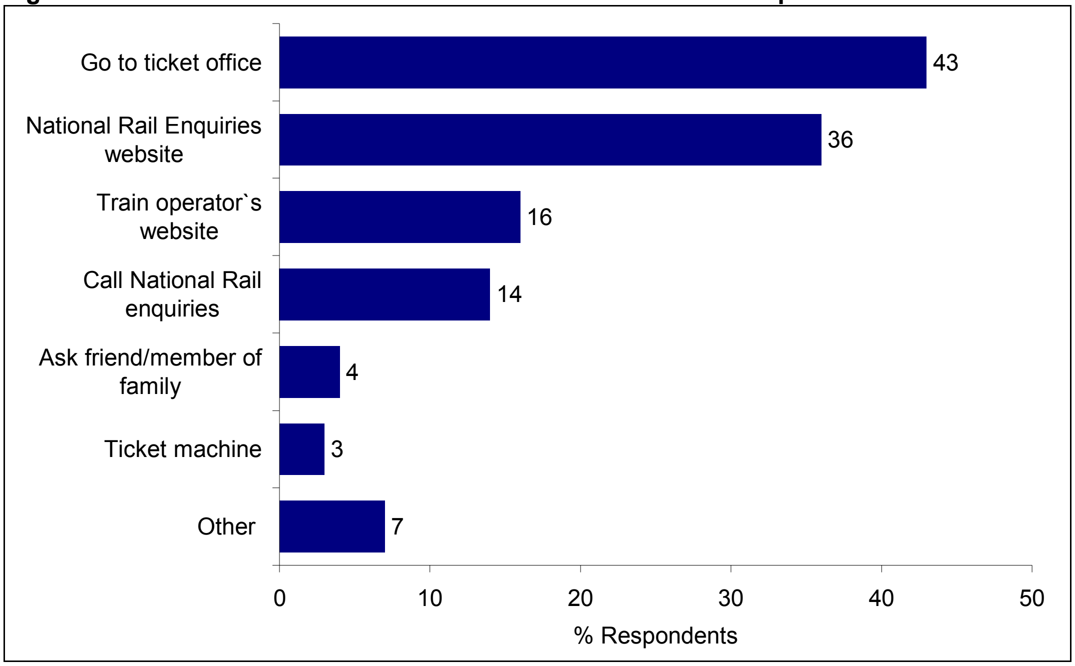
Figure 44: Why respondents use the trip mode for trips in to Central London



In terms of being more convenient/easier than other modes, 4 said it was direct, 3 respondents said it was more reliable, 2 respondents stated that it was close to home, and 2 said it offered more frequent services.

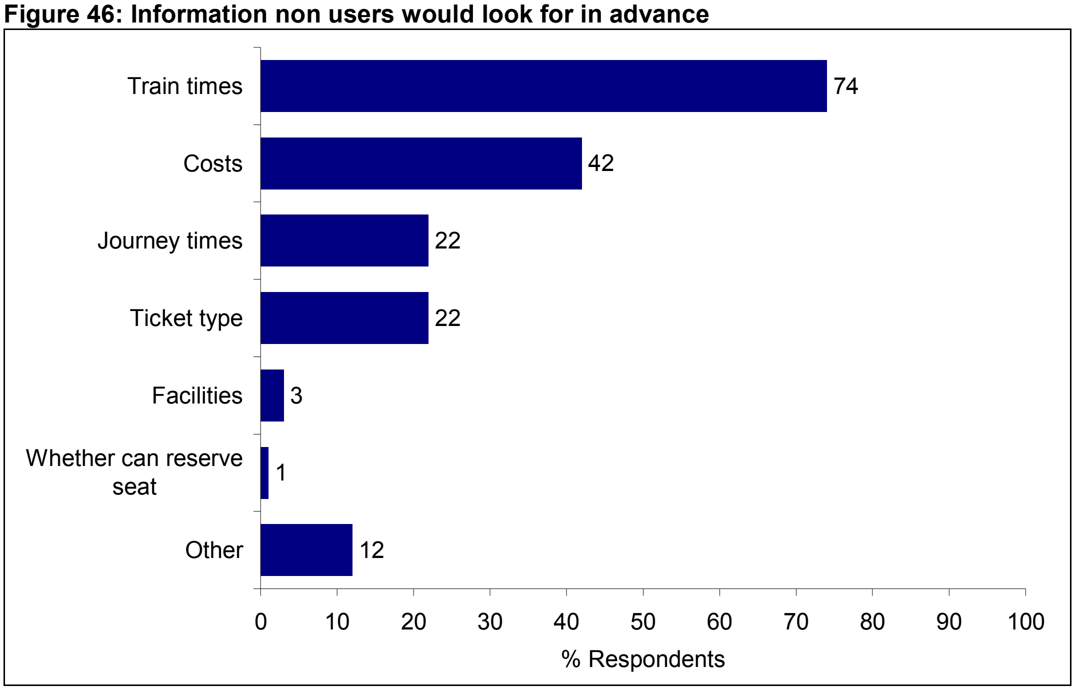
Respondents were asked to consider if they were to use rail for any of the trips how and where they would get the information for the rail trip. Over four in ten non users (43%) would go to the ticket office to obtain information on the rail journey, whilst just over a third (36%) would go to the National Rail Enquiries website.

Figure 45: Where non users would obtain information for a rail trip from



The main items of information that non users would look for in advance, would be train times (74%) and costs (42%). Just over a fifth (22%) would look for journey times and ticket types.

Figure 46: Information non users would look for in advance

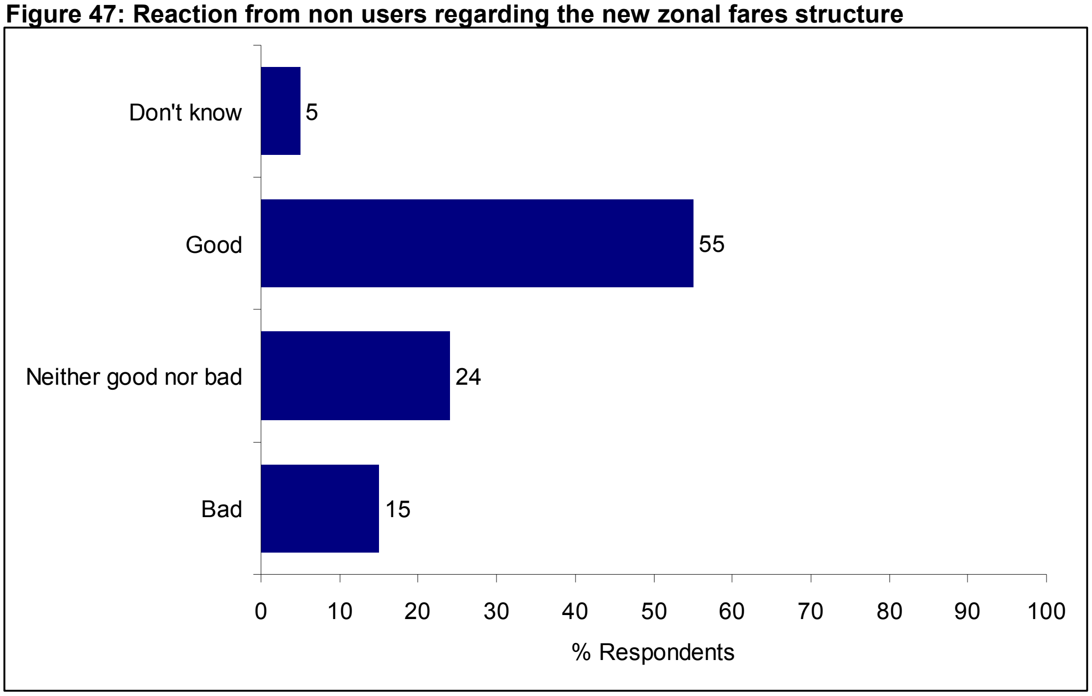


Zonal Fares

Non user respondents were asked whether they were aware of the new zonal fares structure that was due to come into place on 2nd January 2007. The vast majority of non users (86%) were not aware of this new zonal fares structure.

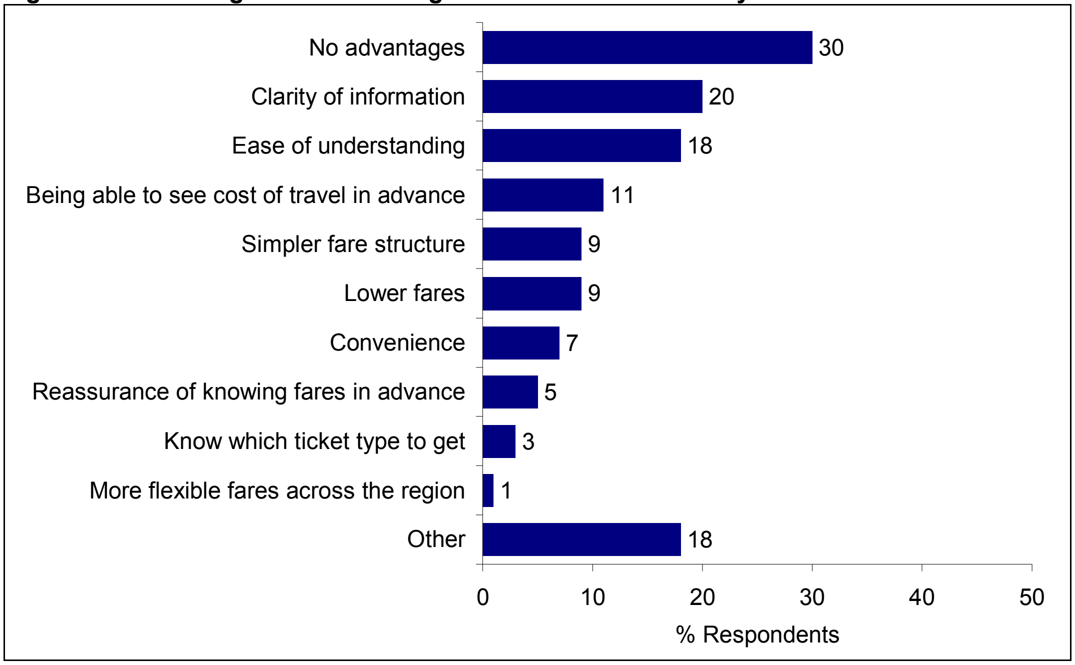
Having been given a description of the new structure (the same one provided to the users), just over half of the non users (55%) felt that the introduction of the new zonal fares structure was good, with about one in seven (15%) considering it to be bad .

Figure 47: Reaction from non users regarding the new zonal fares structure



Although one in three non users could not think of any specific advantages to having the fares structured in this zonal way, the main advantages were considered to be clarity of information (20%) and ease of understanding (18%).

Figure 48: Advantages of fares being structured in a zonal way

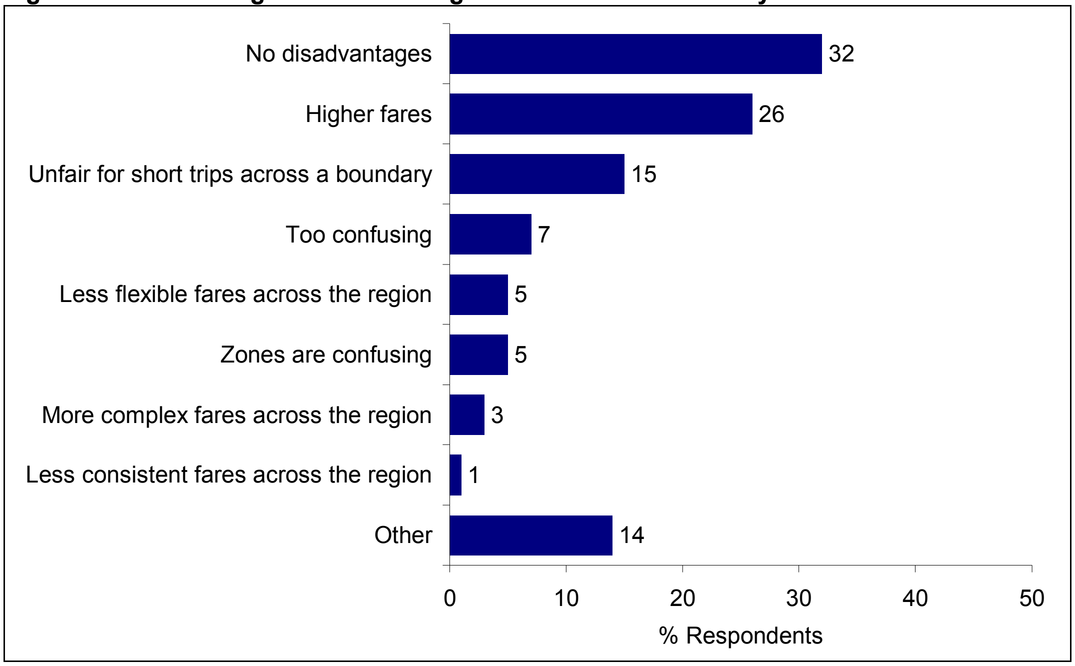


The advantages in terms of convenience envisaged were expressed by three respondents and included that:

- it will be simple to control your cost
- because you have a fair price for your journey
- it is easier to move around.

Whilst just over one in three non users (32%) could not think of any specific disadvantages to fares being structured in a zonal way, the main disadvantages noted were higher fares (26%) and that it was considered unfair for short trips across a boundary (15%).

Figure 49: Disdvantages of fares being structured in a zonal way



3.5 Respondent Classification

Respondents were asked a series of questions about themselves in order to help with classification. These questions asked about employment status, age, gender and annual income.

With regards to employment status almost half of all respondents (48%) were employed full time, rising to three quarters of point to point season tickets holders.Table 16: Respondent employment status

	Total	Non User %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Work full time (30+ hours)	48	47	75	31	44
Work part time (9-29 hours)	16	13	15	23	14
Unemployed	6	4	2	10	9
Looking after home	7	9		11	7
Retired	8	11	1	11	7
Student	8	8	4	11	10
Other	2	3	1		5
Refused	4	6	2	3	5
Base	**475**	**150**	**101**	**119**	**105**

There was a good spread of ages over the sample with just over a quarter of respondents aged 35-44 and around a fifth were aged 25-34 and 45-54. Almost a third of the point to point season ticket holders were aged 25-34, whilst the same proportion of non season point to point ticket holders were aged 45-54. Younger respondents (17-24) and those aged 55-59 were more likely to be holders of a Day Travelcard, 20% and 17% respectively.

Table 17: Respondent age

	Total	Non User %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
17-24	13	11	8	14	20
25-34	18	17	30	11	17
35-44	27	31	25	24	25
45-54	21	16	29	30	12
55-59	9	5	6	9	17
60-64	3	7	1	3	1
65+	4	5		6	3
Refused	5	9	2	3	5
Base	**475**	**150**	**101**	**119**	**105**

Slightly more females than males (55% and 45% respectively) participated in the survey, with this rising to just over six in ten of non users and reducing to just under half for point to point season ticket holders.

Table 18: Respondent gender

	Total	Non User %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Male	45	39	54	45	43
Female	55	61	46	55	57
Base	**475**	**150**	**101**	**119**	**105**

Annual income was answered by approximately half of the sample with income levels spread fairly evenly across the ticket types.

Table 19: Respondent annual income

	Total	Non User %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Under £5,000	2	1	1	3	1
£5,000 to £9,999	2	3		2	2
£10,000 to £14,999	3	3	1	4	2
£15,000 to £19,999	3	3	3	3	3
£20,000 to £24,999	3	3	4	4	2
£25,000 to £34,999	6	11	5	3	5
£35,000 to £49,999	9	10	11	7	10
£50,000 to £74,999	7	3	12	6	8
£75,000 to £99,999	3	1	5	4	5
£100,000 to £124,999	2	1	3	1	4
£150,000 or over	1		1	1	2
Don't know	8	10	5	5	10
Refused	51	51	50	56	47
Base	**475**	**150**	**101**	**119**	**105**

Almost six in ten respondents were willing to be contacted again by ATOC for a follow up survey for this research.

Table 20: Willingness of respondents to be contacted again for a follow-up survey

	Total	Non User %	Point to point season tickets %	Non season point to point tickets %	Day Travelcard %
Yes	56	58	57	54	56
No	44	42	43	46	44
Base	**475**	**150**	**101**	**119**	**105**

4. SUMMARY OF MAIN FINDINGS

The results of this study will provide a contextual grounding for the future waves in order to assess the impact of the introduction of zonal fares. As such no recommendations are required as part of this study. However, we have provided below a summary of the main findings from this phase of the research which can be used to compare the results of the future phases.

4.1 Users

Current Fare Structure (Pre Zonal)

- 30% of existing national rail users state that they only use the train for journeys from their origin locations into Central London. Those least likely to use other modes were those who travel on Day Travelcards, suggesting that their overall incidence of travel (irrespective of mode) into Central London is lower than those using other ticket types. For instance, 75% of those travelling on season point to point tickets stated that they use other modes for journeys into Central London
- The most commonly cited reason for using other modes over trains for these journeys was given as a preference to use other modes at the weekend
- There is confusion about the current (pre zonal) fares structure in operation in the region – with between a quarter and a third of respondents (depending on quota group) unable to describe the current system. In addition, between 38% and 50% believe the current structure is one based on fares organised in zones
- Despite this confusion the majority of respondents consider the current (pre zonal) fare structure to be easy to understand. For those who perceived the structure to be complex, three quarters claim that the complexity doesn't affect the number of journeys they make by train into Central London
- A similar pattern was seen in relation to the flexibility and consistency of the current system and the impact this has on the number of train journeys made into Central London

Zonal Fares

- There was a widespread lack of awareness of the new zonal fare structure amongst non-season point to point ticket holders
- Attitudes towards the zonal fare structure was fairly muted with almost half of respondents believing it to be neither good nor bad. However, those who expressed a positive opinion of the new structure were more prevalent than those who expressed a negative opinion
- For those areas where the introduction of zonal fares will mean modest or big increases in fares, almost a third of respondents envisaged that the fare increase would have resulted in their journey being made by a different mode, with a different ticket or would not have been made at all
- 21 respondents (32%) out of the 64 located in areas which will experience increases in fares stated the increase in fares would result in them making fewer journeys by train into Central London
- For those areas where the introduction of zonal fares will mean modest or big decreases in fares, just 12% of respondents envisaged that the fare decrease would

have resulted in them making any changes to their journey. A small proportion of respondents (between 5% and 2%) claimed that they would have either travelled on a different class ticket or with a more flexible ticket or from a station further away from Central London

- 16 respondents (37%) out of the 43 located in areas which will experience decrease in fares stated the decrease in fares would result in them making more journeys by train into Central London
- Only those who were against the new zonal fares structure were asked questions regarding the perceived complexity, flexibility and consistency of the new structure. Unsurprisingly a greater number of these perceived the zonal structure to be more complex, less flexible and less consistent than the current system. However, the base for this information is very low and should be used as a rough guide only.

4.2 Non-Users

- Amongst non-users there is a general lack of awareness regarding the current (pre zonal) fare structure for train journeys in the region
- Despite this, a third of non-users consider the existing structure to be easy or very ease to understand
- There was also a lack of awareness regarding the perceived flexibility and consistency of the current fare structure
- A willingness to consider trains for trips into Central London was expressed by half of the non-users interviewed – provided their main barriers to use were addressed
- When presented with current fares for both off peak and peak return ticket costs for their origin locations into Central London, non-users generally thought this represented better value for money than they had previously thought
- Non-users would predominantly look to station ticket offices and the National Rail website for information relating to train times and ticket costs if they were considering making a journey into Central London by train
- Unsurprisingly very few non-users were aware of the introduction of zonal fares. Although when described to them over half of the non-user respondents considered the new structure to be good or very good
- From the non-user perspective, advantages to the new structure included a clarity of information, ease of understanding and the ability to see the cost of travel in advance of making a journey
- The perceived disadvantages included the perception that fares would be higher and an unfairness for short trips across the zonal boundaries.

APPENDIX A

Questionnaire

APPENDIX B

Recruitment Questionnaire