EASIER FARES

SYSTRA

PUBLIC CONSULTATION

EASIER FARES

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EXECUTIVE SUMMARY

The Easier Fares Consultation

The Easier Fares Public Consultation was commissioned by the Rail Delivery Group (RDG). The purpose was to understand views of stakeholders and the general public on the type of rail fares system and structure they would like in the future. The findings from the consultation will be used by RDG to develop proposals to government. The proposals will aim to be revenue neutral, which means that any changes to fares would need to be balanced out.

The intention to run a consultation was announced to the media in May 2018. The consultation period began on 4th June 2018 and ended on 10th September 2018, giving stakeholders and the general public 14 weeks to respond. It was an open consultation, meaning anyone could choose to respond if they so wished. Individuals and organisations could respond either by completing the consultation questionnaire online, or by providing a completed consultation questionnaire or freeform response by post or email.

Between May and September 2018, the consultation was promoted via the Britain Runs on Rail website, through press releases and media broadcasts, through paid-for social media advertising and via rail companies, passenger groups, political representatives, social influencers and other third-party stakeholders who were supplied with promotional material to reach their customers and audiences.

The majority of consultation responses received were from individuals and were submitted online using the consultation questionnaire. However, a small proportion were submitted on behalf of organisations and in a freeform format sent by email or post.

There was a total of 19,159 responses to the consultation.

Changes to fare structure

There was overwhelming support for reform to rail fares amongst consultation respondents, the vast majority of whom considered reform quite (30%) or very (54%) necessary. Less than one in ten (8%) considered it unnecessary. The most frequent comments made in support of change related to there being too many fare options currently, and the need for consistency and transparency.

To what extent do you consider it necessary to reform the way rail fares are currently structured

- Very necessary
- Quite necessary
- Neither necessary nor unnecessary
- Not very necessary
- Not at all necessary

54%
30%
7%
6%
2%
1%

"It is a confusing mess with different companies, fare structures, restrictions and offers. A simpler, transparent rail fare structure should be in place." (Individual)

Whilst there is clear support for rail fare reform, only a slightly higher proportion of respondents indicated that they would prefer the balance of discounted fares and standard ticket fares to change than remain as they are now. Of those who wanted change, similar proportions favoured lower standard ticket prices and no discounted tickets, as favoured higher standard ticket prices with greater discounts than currently offered.

Which option best reflects your preference for the range of rail fares available?
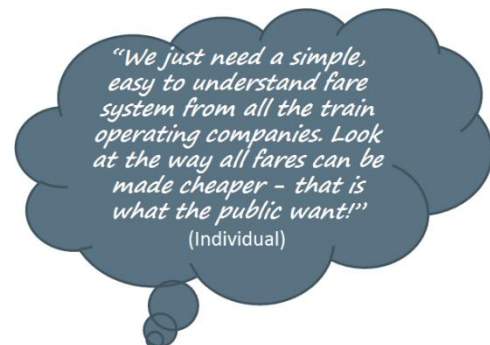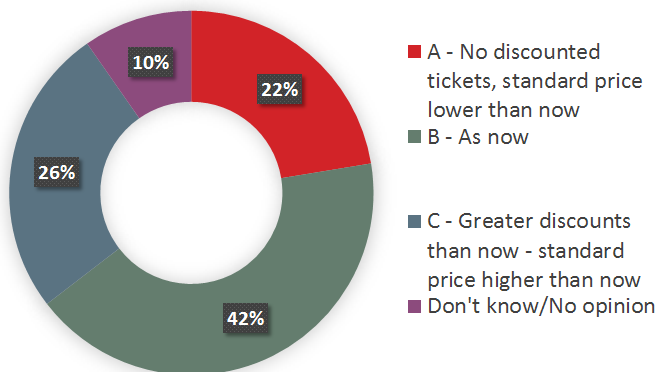
- A - No discounted tickets, standard price lower than now
- B - As now
- C - Greater discounts than now - standard price higher than now
- Don't know/No opinion

"We just need a simple, easy to understand fare system from all the train operating companies. Look at the way all fares can be made cheaper – that is what the public want!"
(Individual)

All but one of a series of 10 suggested future scenarios for changes to fare structures were viewed positively by respondents. For each of these, over two thirds of respondents indicated that they should 'maybe' or 'definitely' be considered. The graph below also takes into consideration the proportion of respondents who said the scenarios should not be considered i.e. for each scenario, it shows the proportion of respondents who thought it should be considered minus the proportion who thought it should not be considered.
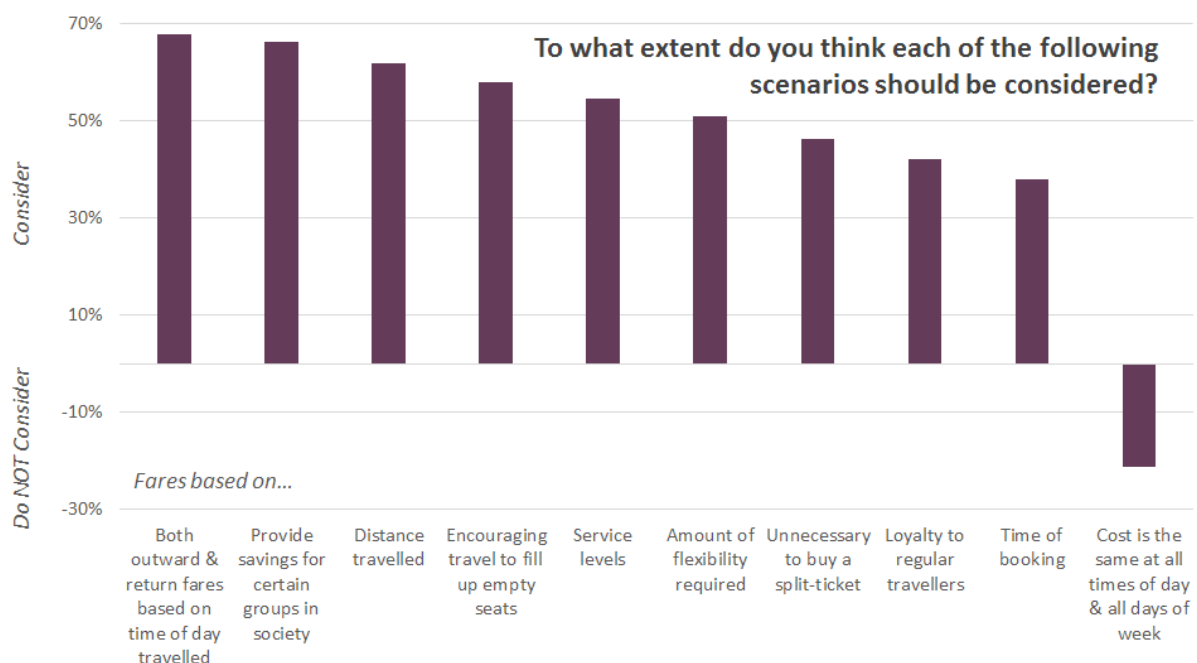
The scenario where cost is the same at all times of day and days of the week was considerably less popular than other suggestions. While nearly two in five considered this suggestion worthy of consideration, around three in five felt it should not be considered. There were a particularly large number of comments made relating to this scenario, in particular expressing support for maintaining peak and off-peak fares, with many suggestions relating to revised definitions of peak and off-peak hours, consistency across the network, the need for clearer information, and changes to the difference in cost between different types of fares.

"Discounts should remain for specific groups e.g. seniors, young people, disabled people." (Individual)

"I believe that the system needs to change to a distance travelled basis. It is wholly unfair that a West Kirby to Manchester ticket costs a fraction of London to Andover" (Individual)

"I believe there still needs to be a peak/off peak difference as otherwise peak services will be even more crowded (and off peak services will be even emptier)." (Individual)

There were a considerable number of comments made by respondents supporting other fare structures. The most common comments expressed support for **capped fares**, **paying for what you use**, and **part time season tickets**, and suggestions for **improvements to season tickets**. Other suggestions relating to fares, receiving the most comments, related to seat reservations, first class fares, penalty fares and enforcement.

There were also a considerable number of comments made relating to **fare levels**, in particular suggesting that they are **too high**, that they **should be reduced or frozen**, and that they **should be competitive with other modes**. This is seen as important for rail users, the environment and to encourage more rail use. Many consider current price levels are not reflective of service levels received.

Changes to ticketing

Whilst consultation respondents expressed strong support for reform to the ways in which tickets can be purchased, this was not as strong as the support for reform to rail fares. Around two thirds of respondents considered reform to the ways in which tickets can be purchased as quite (29%) or very (36%) necessary. Less than one in five (15%) considered it unnecessary.

To what extent do you consider it necessary to reform the ways in which tickets can be purchased?

- Very necessary
- Quite necessary
- Neither necessary nor unnecessary
- Not very necessary
- Not at all necessary
- Don't know/No opinion

"Streamline the process." (Individual)
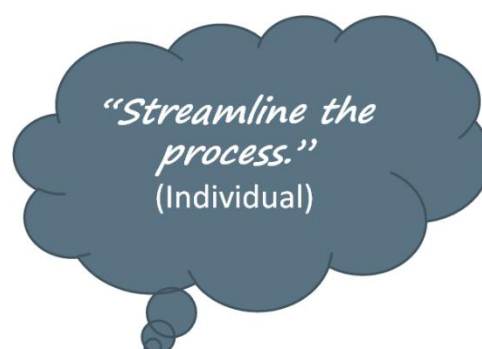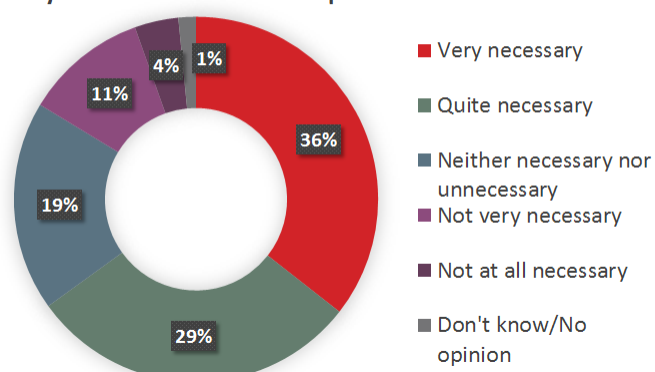
All three future scenarios for ticket purchase reform were perceived by consultation respondents as worth considering. For each, around two thirds of respondents indicated that they should 'definitely' be considered. The graph below shows the proportion of respondents who thought each scenario should be considered minus the proportion who thought each should not be considered.
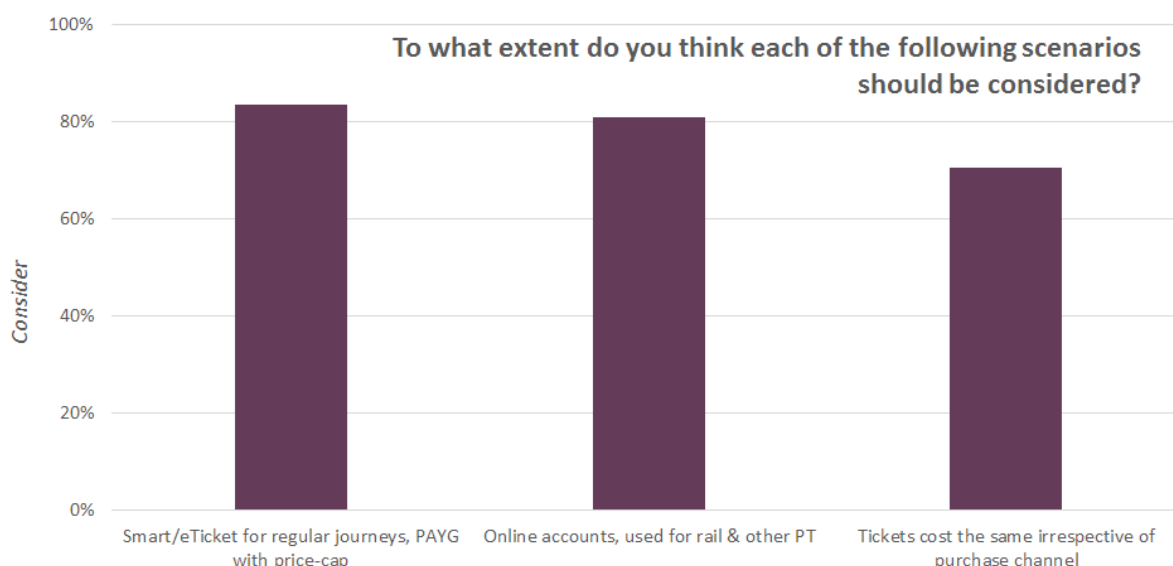
To what extent do you think each of the following scenarios should be considered?

"I think that some sort of digital, capped, carnet arrangement would be good for people like me who work part-time but do not work the same days each week and do not necessarily have to travel each week." (Individual)

"Smart ticketing, combined ticketing (bus/train/tram) online access to journeys. Proper integrated transport." (Individual)

"People should not be punished by paying more if they do not have smart phones, apps, laptops, printers etc." (Individual)

Data Trends

The consultation results tend to show a disparity in views between commuters and those travelling for leisure/business use. Similarly, but less often, is a difference in views between those residing in urban areas and those residing in more rural areas. For example:

○ Commuters were more likely than those travelling for other purposes to think that the following fare structures/ticketing options should be considered:

- fares where the cost is the same at all times of day and all days of the week;
- fares designed so that it is unnecessary to buy a 'split-ticket';
- fares based on loyalty to regular travellers; and
- smart or electronic tickets, with the potential for a 'price cap'.

○ Leisure and business travellers were more likely than commuters to think that the following fare structures should be considered:

- fares based on time of booking;
- fares based on the amount of flexibility required;
- fares based on encouraging travel to fill up empty seats;
- fares which provide savings for certain groups in society; and
- fares that reflect both the outward and return journey time of travel.

O   Respondents who lived in London were more likely to state that distance based fares should be considered than those who lived in Scotland, Wales or Northern Ireland.

1. INTRODUCTION

1.1 Background to the Easier Fares Consultation

1.1.1 It is considered that Britain's fares system has failed to keep pace with the rise of modern technology and how people work and travel today. With part time working and self-employment having increased by over a third in 22 years, the products offered are often perceived as inadequately flexible, and many perceive them to be complicated and confusing.

1.1.2 Fares and ticketing regulation was originally set out in 1995. The rail industry would like to see this regulation updated so that customers can be offered an easier to use range of fares, and to enable the industry to deliver improvements in ticket buying technology.

1.2 Consultation Objectives

1.2.1 The Easier Fares Public Consultation was commissioned by the Rail Delivery Group (RDG) and Transport Focus to understand the public's views on the type of fare system and the fare structure they would like to see in the future.

1.2.2 The findings from the consultation will be used by the RDG to develop proposals to government. The proposals will aim to be revenue neutral, thus any changes to fares would need to be balanced out.

1.3 Consultation Overview

1.3.1 The consultation period began on 4th June 2018 and ended on 10th September 2018, providing the public with 14 weeks to respond. The consultation was open to any individual or organisation to provide a response.

1.3.2 To respond to the consultation, organisations and members of the public could complete a structured questionnaire (containing both closed and open-ended questions), or provide a free form response by post or email. Further details on the consultation methodology and response channels are provided in Chapter 2.

1.3.3 A total of 19,159 responses to the consultation were received.

2. METHODOLOGY

2.1 Consultation Response Channels

2.1.1 The consultation was open to any organisation and any member of the public who wished to provide a response. Several response channels were made available, including:

- An online version of the consultation questionnaire, managed through Smart Survey. The survey link could be accessed by visiting the Britain Runs on Rail website: https://www.britainrunsonrail.co.uk/fares, and was available to complete in either English or Welsh;
- PDF versions of the online survey were available to download, and print if required. Once completed, these response forms could either be submitted by post to the 'FREEPOST Easier Fares' address or by email to the 'easierfares@britainrunsonrail.co.uk' mailbox; and
- Freeform responses were accepted via email and post.

2.1.2 In total, 19,159 responses were received: 19,105 used the consultation questionnaire; and 54 were freeform. The number of responses obtained through each channel is provided in Table 1.

Table 1. Number of responses received by channel

CHANNEL	NUMBER OF RESPONSES
Online Survey (English)	19,050
Online Survey (Welsh)	5
Post (questionnaire)	37
Post (freeform)	2
Email (questionnaire)	13
Email (freeform)	52
TOTAL	**19,159**

2.2 Consultation Questionnaire

2.2.1 Respondents were presented with an introductory page which explained why the consultation was taking place, explained that a small amount of personal data would be collected as part of the submission, and included a link to Britain Runs on Rail's Privacy Policy. The consultation end date was also displayed at the foot of this page.

2.2.2 The consultation was structured in three distinct sections:

- Part 1: Fare Structures;
- Part 2: Buying a ticket; and
- Part 3: Any other thoughts.

2.2.3   Parts 1 and 2 consisted of a series of closed questions, where respondents indicated the extent to which various proposals should be considered on a three-point scale, and the degree to which they felt reform was necessary on a five-point scale. Part 3 consisted of three open-ended questions, where respondents could provide their own comments on the topics covered in Parts 1 and 2, and offer any other comments they thought were relevant. The topics covered in the survey are provided in Table 2. The English PDF version of the consultation questionnaire is provided in Appendix A.

Table 2.   List of topics covered in Parts 1 and 2 of the survey

SURVEY SECTION	TOPICS COVERED
Part 1: Fare Structures	- Distance travelled based fares - Service level based fares - Peak and Off-Peak fares - Advance and At Time of Travel fares - Fares based on the amount of flexibility required - Split Ticketing - Fares based on encouraging travel to fill up empty seats - Fares based on loyalty to regular travellers - Discounts/savings for certain groups in society - Single and Return fares
Part 2: Buying a ticket	- Should a ticket cost the same however you buy it? - Price/fare capping - Online accounts could be available which could be used for rail and other of types of public transport
Part 3: Open-ended questions	- Factors which should influence rail fare structures - Factors which should influence ticket purchasing - Any other comments

2.3   Public Engagement

2.3.1   In order to raise maximum responses and awareness of the consultation, RDG managed a range of activities. Initially the intention to run a consultation was announced to media in May and received high levels of media pick-up, with broadcasts on both Sky and BBC News. This was supported by paid-for advertising on Facebook and Twitter targeting rail customers across the country (specifically targeting those within a close proximity of large

train stations), and content was hosted on the Britain Runs on Rail website (the industry campaign micro-site). During the announcement RDG offered people the opportunity to register for an email notification as to when the consultation went live, and over 1,400 people signed-up for this notification.

2.3.2   Between 4th June and 10th September 2018, a series of press releases and media engagements generated stories about the consultation. Again paid-for advertising on Facebook and Twitter was utilised to promote customers to respond. All those who registered to hear about the consultation were sent three reminder emails to take part in the consultation. Rail companies, passenger groups, political representatives, social influencers and other third-party stakeholders were supplied promotional material to promote on social media and on other channels available to generate responses. RDG saw significant traffic driven to the Britain Runs on Rail micro-site through support from National Rail, Network Rail, Train Operating Companies, Money Saving Expert and Camping for Better Transport.

2.4   Coding of Open Ended Questions

2.4.1   For the open-ended questions, all comments were read, and each sentiment or idea mentioned was allocated to a code, or 'heading'. These headings (and their relationships) are known as the 'coding framework'.

2.4.2   Our analysis of responses about fare structures, buying a ticket and other comments has been broadly grouped into:

  ○   Reasons for support/opposition/concerns; and
  ○   Suggestions for improvements.

2.4.3   New codes were added as new sentiments were found in the responses. This allowed the coding frame to be developed and refined over time, and ensured all views were captured

2.4.4   Our approach was to code based solely on what the responses stated, and not to interpret or assess whether their comments were valid. This was to ensure that the process of coding was as objective as possible, which in turn maximises inter-coder reliability.

2.5   Analysis

2.5.1   SYSTRA have read, coded, analysed and reported on all responses. As independent, impartial researchers, we believe that we have a duty to society to ensure that we report findings accurately, and with honesty. In adherence to our industry guidelines, we have not been selective in our reporting, and we provide insight into both commonly and uncommonly cited themes referenced by respondents.

2.5.2   We have developed a data-led, three-tier coding framework to standardise the analysis of these responses.

  ○   Level 1 – Survey Section (e.g. Fare Structure)
  ○   Level 2 – Topic (e.g. Peak and Off-Peak fares)
  ○   Level 3 – Specific comments (e.g. Support - To avoid overcrowding)

2.6 Reporting

2.6.1 Responses to the closed (quantitative) questions, and the open (qualitative) questions which relate to the closed questions, have been reported within the same chapters.

2.6.2 In reporting the closed questions, differences between different groups of people have only been provided where they are statistically significant. Given that only a small proportion of responses were from organisations, the report does not break organisation responses down any further.

2.6.3 The qualitative themes reported in each chapter are presented in decreasing frequency of occurrence, with topics typically falling into three areas:

- Supportive statements

  - With no additional information provided
  - With reason given for support
  - With caveat provided

- Opposing statement

  - With no additional information provided
  - With reason given for opposition

- Suggestions for improvements.

2.6.4 As such, there is some repetition between areas where, for instance, the caveat of a supportive statement is also repeated as a suggestion for improvement.

2.6.5 Verbatim quotes from consultation responses are used to illustrate the points made and demonstrate not just the content or the specific points raised by respondents, but also to convey the tone of responses received. Where a number of points are discussed consecutively quotes have been grouped together at the end of the paragraph.

2.6.6 As with all analysis of qualitative data, it should be noted that:

- The views and opinions reported are the views and perceptions of respondents and are not necessarily factually correct;
- Qualitative data, particularly in instances where the sample is self-selecting, does not provide a statistically representative sample. Instead, it ensures the views and opinions of different types of people are heard; and
- Whilst we have provided numbers to illustrate the prevalence of each sentiment, this engagement process cannot be seen as a 'vote' and we do not attempt to draw conclusions about what the 'best' suggestion might be, based on the number of people offering positive or negative comments about a particular suggestion.

3. RAIL FARE STRUCTURE REFORM OVERVIEW

3.1 Balancing the Needs of Different Customers

3.1.1 Respondents were presented with the following three options, each describing a theoretical range of rail fares that could be available in the future.

Option A
No discounted tickets, standard ticket price lower than now

- The cost of a single fare between any two stations will always cost the same amount.
- There will be no difference in price between travelling at busy times (peak) and less busy times (off-peak).

This may mean:
- There will be lower fares than now on busy services.
- There will be higher fares than now on less busy services.
- Trains are likely to be busier than now in the peak period.

Option B
Discounted fares same as now, standard ticket price same as now

- On some routes, the cost of a single fare between any two stations will vary, in the same way as now.
- There will be cheaper tickets available at less busy times (off-peak) on routes where this is currently offered.
- There will be discounts for booking a ticket for specific trains in advance on routes where this is currently offered.

This may mean:
- Fares will be similar to now on busy services.
- Fares will be similar to now on less busy services.
- Trains are likely to carry the same number of passengers as now.

Option C
Greater discounts than now, standard ticket price higher than now

- On some routes, the cost of a single fare between any two stations will vary, in the same way as now.
- The difference in the cost of a single fare between any two stations at busy times (peak) and less busy times (off-peak) will be greater than it is now.
- Discounts for booking specific trains in advance will be greater than now but fully flexible fares will cost more.

This may mean:
- There will be higher fares than now on busy services.
- There will be lower fares than now on less busy services.
- Trains are likely to be less busy than now in the peak period.

3.1.2   When asked which option best reflected their preference for the range of rail fares available, around half (48%) opted for change, selecting either Option A or Option C. A full breakdown of responses to this question can be seen in Figure 1.

Figure 1.   Please select the option that best reflects your preference for the range of rail fares available (n=18,997)
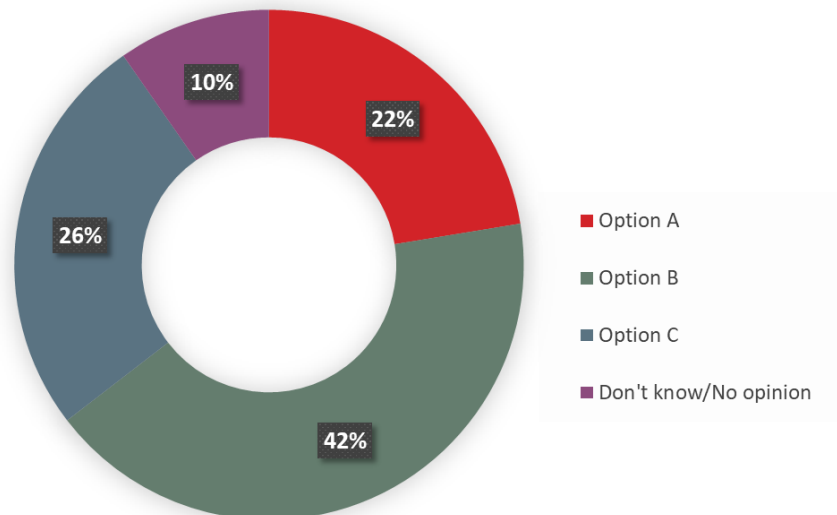
3.1.3   Respondents' views on which option best reflected their preference for the range of rail fares available varied significantly by the following respondent characteristics:

- Whether they were responding on behalf of an organisation, or as an individual;
- Frequency of travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

3.1.4   Key points of interest include:

- Individual respondents were more likely to opt for change, choosing Option A or C (54%), in comparison to organisations (38%), whilst organisations were more likely to choose No change, Option B (62%), in comparison to individuals (47%);
- Respondents under the age of 55 were more likely to choose Option A than respondents aged 55 and over (35% compared with 16%, respectively);
- Commuters were more likely to choose Option A (39%) in comparison to business passengers (27%) and leisure users (18%); and
- Similarly, those who buy season tickets (annual/monthly/weekly) were more likely to choose Option A (40%) than those who buy other types of ticket (24%).

3.2   The Need for Reform

Closed Question Results

3.2.1   Further to the results presented in section 3.1, more than four fifths (84%) of respondents said they considered it either very or quite necessary to reform the way rail fares are currently structured, with over half (54%) thinking it was very necessary. A full breakdown of responses to this question can be seen in Figure 2.

Figure 2.   **To what extent do you consider it necessary to reform the way rail fares are currently structured? (n=19,017)**

Legend:
- ■ Very necessary
- ■ Quite necessary
- ■ Neither necessary nor unnecessary
- ■ Not very necessary
- ■ Not at all necessary
- ■ Don't know/No opinion

3.2.2   Respondents' views on the necessity to reform the way rail fares are currently structured varied significantly by the following respondent characteristics:

- Whether they were responding on behalf of an organisation, or as an individual;
- Frequency of travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

3.2.3   Key points of interest include:

- Those travelling for commuting purposes were more likely than those travelling for business and leisure to consider reform necessary (88% compared with 86% and 83%, respectively);
- Similarly, those travelling with season tickets (annual/monthly/weekly) were more likely than those travelling with other types of ticket to consider reform to be necessary (88% compared to 84%).

Findings from the Open-Ended Questions

3.2.1   Of the 19,159 responses received to the consultation, 2,784 respondents made reference to the need for fare reform. The vast majority of comments suggested that reform was needed, with specific suggestions, each made in a substantial minority of comments, that reform should:

- ○   Improve the transparency of different fare types in order to:

  - ●   Improve the ease of selecting a correct fare, in general; and
  - ●   Improve the ease of selecting the cheapest correct fare.

- ○   Reduce the number of fares available; and
- ○   Improve consistency of the fares available across operators, as well as across different parts of the country.

3.2.2   Additionally, a minority of responses indicated that reform of fare structure was specifically needed for short journey fares and to increase rail usage.

> *"Rail fares need restructuring - it is currently far too complicated."* (Individual)
>
> *"The only factor that should influence rail fare structure is ease of use for the customer. At all times, this should be the prevalent deciding factor in how fares work."* (Individual)
>
> *"The most important thing when buying a ticket is for it to be easy to buy the cheapest ticket available for the journey you want to make."* (Individual)
>
> *"The rail fare structures are currently broken - how is it possible to have so many different options on the same route?"* (Individual)
>
> *"I think we should look at standardising the tickets available between different companies. So that we have one simple and unified ticketing system."* (Individual)
>
> *"If it was a single system with similar rules throughout the network, rather than every TOC having different ticketing systems, structures and prices and rules then that would in itself provide much of the necessary simplification."* (Individual)

Key Points

- ○   Around half of respondents opted for change in rail fare structure, selecting either Option A or Option C.

- ○   The majority of respondents suggested that reform was needed, in general, with suggestions that this would afford: greater transparency; a reduction in the number of fares; and improved consistency across operators.

4. FARES BASED ON DISTANCE TRAVELLED

4.1 Closed Question Results

4.1.1 Respondents to the consultation were asked whether '**fares based on distance travelled (e.g. there is a cost per mile travelled)**' should be considered. Eight out of ten respondents (80%) thought this suggestion should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 3.

- Definitely consider
- Maybe consider
- Do not consider
- Don't know/No opinion
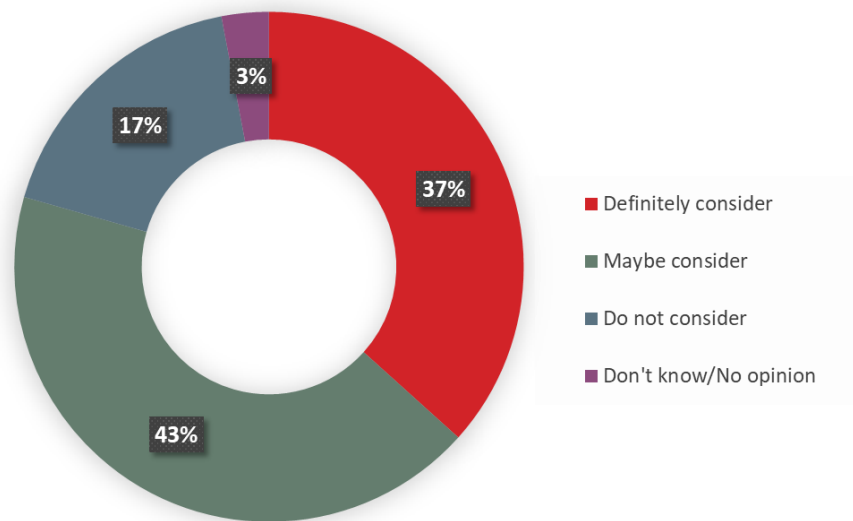
4.1.2 Respondents' views on whether fares should be based on distance travelled varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

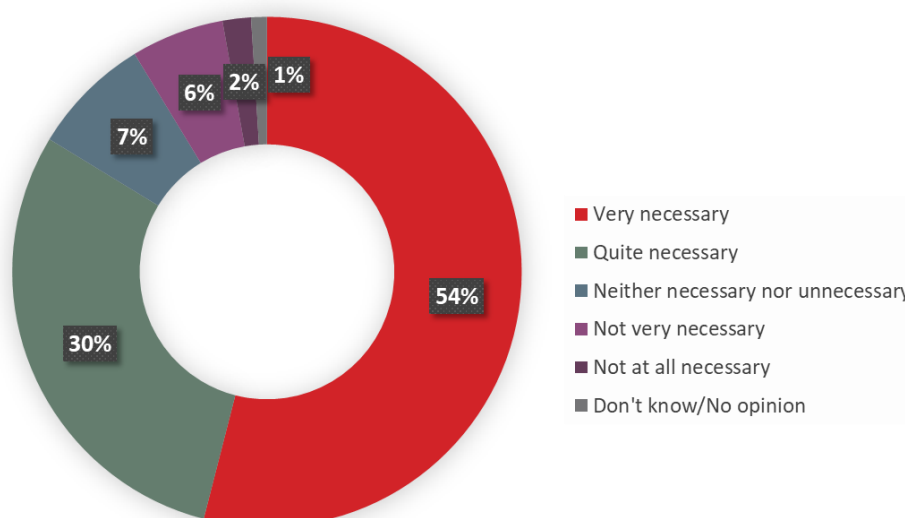4.1.3 Key points of interest include:

- 85% of respondents who lived in London thought distance based fares should (maybe or definitely) be considered compared to 78% of those who lived in Scotland, Wales and Northern Ireland.

4.2 Findings from the Open-Ended Questions

4.2.1 Of the 19,159 responses received to the consultation, 1,106 made reference to distance based fares. The vast majority of these provided supportive comments, for example saying distance should be taken into account.

> *"Distance travelled should be a factor in regular (non-discounted) fares. Please fix historic anomalies where some lines cost vastly more per mile than others e.g. Harlow/Bishops Stortford to London."* (Individual)
>
> *"I think the cost per distance travelled should be the same around the UK, or at least closer to being the same, because currently it seems train fares near London are much more expensive per mile/km compared to regions far from London."* (Individual)

4.2.2 Some of those providing supportive comments did so with caveats, i.e. they supported distance based fares, but with:

- Discounts for longer journeys;
- Minimum price limits for very short journeys;
- Different price tiers for:

    - Peak and off-peak travel times;
    - Advance and at time of travel tickets; and
    - Urban and rural locations.

> *"Flexible fares should follow a pence per mile rule, but not in linear form. Short distance travel should have a greater pence per mile, with long distance the lowest pence per mile."* (Individual)
>
> *"Fares should change to a nationally set pence per mile. E.g. 15p/mile travelled 08:00-10:00 and 16:00-18:00 and 10p/mile travelled at all other times."* (Individual)
>
> *"Advance fares should be cheaper although the price should be per distance covered, so in advance it might be 25p per mile & on day say 30p per mile."* (Individual)
>
> *"Price by distance is a good idea but some services may need supplementation or discount depending on the area, e.g. short distance London commutes could start losing money, while long distance routes in rural areas could negatively affect the communities there."* (Individual)

4.2.3 A small minority of responses referencing distance based fares were opposing this scenario.

> *"Very concerned if a distance based pricing system is put in. Many people on lower end of pay scale are today forced to live outside major cities and commute in due to house prices."* (Individual)

"The distance travelled should not be a main basis for ticket prices as this does not always reflect the distance between start and end points. Train journeys in Wales being a classic example whereby travel between two points which are geographically close can require an indirect journey e.g. Carmarthen to Aberystwyth is less than 40 miles but by train is approx. 240 miles." (Individual)

Key Points

O   There is considerable support for fares based on distance to be considered.

O   Some variations to a simple flat-rate may be desirable.

5.   FARES BASED ON THE LEVEL OF SERVICE RECEIVED

5.1   Closed Question Results

5.1.1   Respondents to the consultation were asked whether **'fares based on the level of service received (e.g. fares for routes with a lower quality service - such as slower, less regular and more basic trains - are lower than fares for routes with a higher quality service)'** should be considered. Just over three-quarters of respondents (76%) thought this suggestion should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 4.

Figure 4.   To what extent should 'fares based on the level of service received' be considered? (n=18,993)
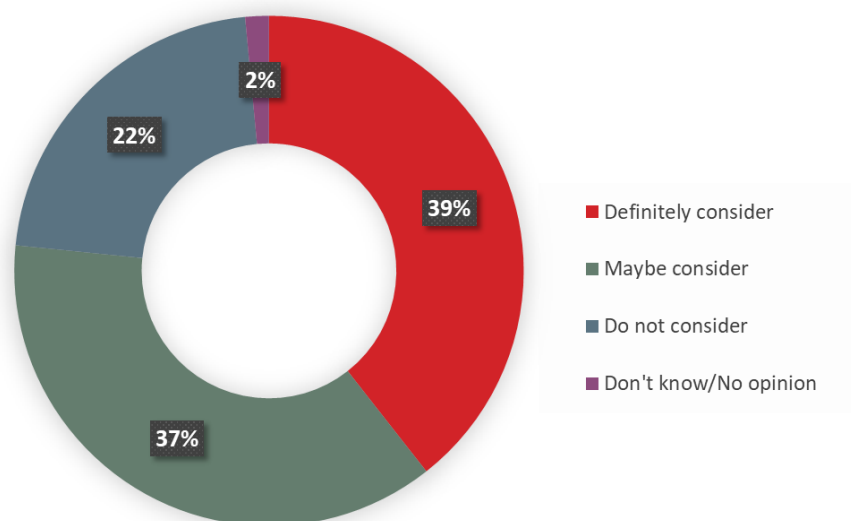
5.1.2   Respondents' views on whether fares should be based on the level of service received varied significantly by the following respondent characteristics:

- Whether they were responding on behalf of an organisation, or as an individual;
- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Gender; and
- Region lived in.

5.1.3   Key points of interest include:

- Respondents providing views on behalf of organisations were more likely to state that this suggestion should (maybe or definitely) be considered (84%) than those responding as individuals (78%); and

○ Respondents who use smartcard, contactless bank cards and mobile phones were more likely to state this suggestion should (maybe or definitely) be considered (79%) than those who do not use smart ticketing (76%).

5.2 Findings from the Open-Ended Questions

5.2.1 Of the 19,159 responses received to the consultation, 798 made reference to service level based fares. The vast majority of these provided supportive comments, of which most did not specify any particular reason.

> *"Fares should reflect the level of service."* (Individual)
>
> *"I like the idea that poorer services cost less."* (Individual)
>
> *"Passengers should pay for the level of service they receive on their network."* (Individual)

5.2.2 Other supportive comments requested for fares to be specifically based on:

○ Journey time, for example cheaper fares for longer services with changes and more expensive fares for faster, direct services; and
○ Reliability of the service, whereby services which run less frequently or commonly experience delays are cheaper whilst regular or punctual services are more expensive.

> *"Fares should be reduced for inconvenient routes i.e. for multiple changes, long detours, etc."* (Individual)
>
> *"With regard to premium routes and express trains it seems that market forces have to prevail and so the costs must reflect this."* (Individual)
>
> *"Where a line/route is repeatedly late running or has cancelled trains, the fares for that route should be reduced for a period, until the line is back to punctual and reliable."* (Individual)
>
> *"Fares should ideally reflect the quality of service provided - a frequent service 20hrs a day, 7 days a week should be priced more than a once a day one."* (Individual)

5.2.3 A small minority of comments were opposing fares based on level of service.

> *"I strongly believe that people should not receive a better or faster service based on their ability to pay."* (Individual)
>
> *"I like a lot of the ideas being put forward, but the idea that travellers should pay more to travel on "reliable and comfortable trains" is nonsense."* (Individual)
>
> *"Passengers should not be penalised for poor service by paying more for a reliable service."* (Individual)

Key Points

 O   There is support for fares based on service level to be considered.

 O   Service level was mainly interpreted as journey time and reliability.

6. FARES WHERE THE COST IS THE SAME AT ALL TIMES OF DAY AND FOR ALL DAYS OF THE WEEK

6.1 Closed Question Results

6.1.1 Respondents to the consultation were asked whether **'fares where the cost is the same at all times of day and for all days of the week (e.g. fares are the same at busy (peak) and less busy (off-peak) times)'** should be considered. Three-fifths of respondents (60%) thought this suggestion should not be considered. A full breakdown of responses to this question is provided in Figure 5.

Figure 5. **To what extent should 'fares where the cost is the same at all times of day and for all days of the week' be considered? (n=18,915)**
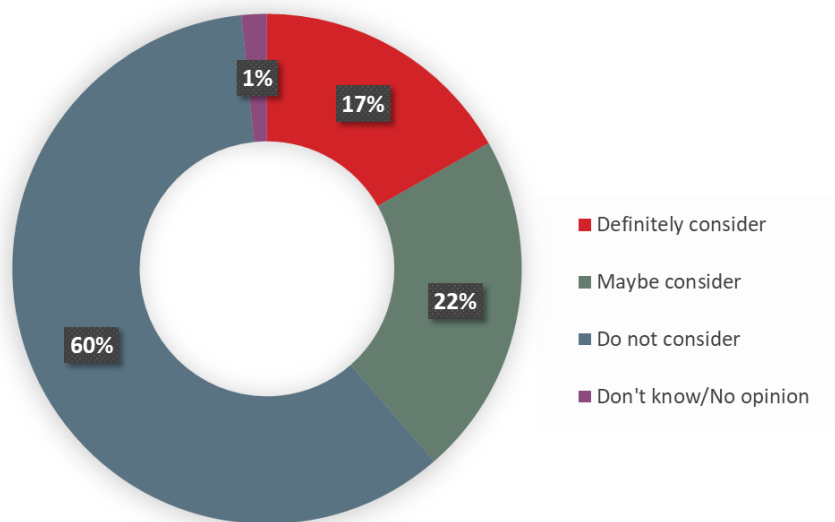
6.1.2 Respondents' views on whether fares should be based on time of day varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

6.1.3 Key points of interest include:

- Respondents who travel at least once a week were more likely to state that this suggestion should (definitely or maybe) be considered (44%) than those who travel less frequently (36%);

○ Commuters were more likely to state that this suggestion should (definitely or maybe) be considered (48%) than those who travel for business (40%) or leisure (35%); and

○ Respondents who purchased Season Tickets (annual/monthly/weekly) were more likely to state that this suggestion should (definitely or maybe) be considered (49%) than those who purchase other types of tickets (38%).

6.2 Findings from the Open-Ended Questions

6.2.1 Of the 19,159 responses received to the consultation, 3,372 made reference to peak and off-peak fares. The majority of comments were supportive of maintaining peak and off-peak fares, most of which did not provide any specific reason. The remaining provided caveats alongside the support.

○ The main reasons for support were to avoid overcrowding on peak services and to encourage greater use of services during off-peak periods.

"I think there should be some form of differential between peak and off-peak fares to encourage people who can travel at off-peak times to do so." (Individual)

"It is acceptable to encourage less travel in peak times and more travel in off peak times so a fare structure should reflect this." (Individual)

"I believe there still needs to be a peak/off peak difference as otherwise peak services will be even more crowded (and off-peak services will be even emptier)." (Individual)

○ Other frequently raised supportive comments were linked to suggested improvements regarding the differences in peak/off-peak periods across the network, these included:

● Making peak/off-peak timing consistent across the rail network;
● Clearly advertising the time and route restrictions attached to peak/off-peak periods, when buying and using tickets; and
● Reviewing peak/off-peak times and routing restrictions.

"Peak Time (and shoulder peak) restrictions, if used, should be universal i.e. The same times for all operators." (Individual)

"The problem is that it's currently extremely confusing to figure out which services class as peak/off peak/super off peak." (Individual)

"There needs to be clarity on when off peak is - at the moment it seems to vary and to be assumed that people know." (Individual)

"There is nothing wrong with having peak time fares, but you should reduce the time band for peak fares to e.g. 7 to 9 am and 4 to 6.30 pm." (Individual)

○ Some supportive comments suggested a reduction in the variety of peak and off-peak fares available for purchase, including the removal of super off-peak fares.

> *"There should be just one off-peak fare, rather than "super" and "day" tickets."* (Individual)
>
> *"There is off peak and super off peak. I think this distinction is unnecessary and there should just be two types of ticket, i.e. peak and off peak."* (Individual)

○ Some supportive comments suggested a change in the price difference between peak and off-peak, most of which wanted a reduction (peak to be decreased, off-peak to be increased, or both) and a few wanted an increase in price difference (peak to be increased, off-peak to be decreased, or both).

○ A few other supportive suggestions requested:

- Fares to reflect changes from peak to off-peak periods during a specified journey;
- The application of peak/off-peak fares on specific services e.g. Urban areas, short track routes, Commuter services; and
- A greater variety in peak and off-peak fares, including more availability of super off-peak fares.

> *"You should be able to go one direction in peak time and the other off-peak and not have to pay a full peak return fare"* (Individual)
>
> *"A peak is necessary but should only affect places where demand is strong, such as into cities in the morning and out in the evening."* (Individual)

6.2.2   A substantial minority of comments provided suggestions and improvements for current peak and off-peak fares without explicit support or opposition.

○ The main comments were linked to improvements regarding the differences in peak/off-peak restrictions across the network.

- Most comments expressed interest in making peak/off-peak timings consistent across the rail network, with reference to avoiding overcrowding;
- Many asked for peak and interpeak period time restrictions to be reviewed;
- Some wanted flexibility between peak/off-peak periods via ticket upgrades; and
- A few wanted greater variation in the peak and off-peak periods across the network.

> *"National parity about peak/off peak timings and policies is essential. Individual TOCs unilaterally deciding to implement peak pricing is a stitch up for customers."* (Individual)
>
> *"The current system … shows any fare before 0930 Monday to Friday as Peak. How can a train … at around 0500 in the morning be classed as peak. This is one of many examples that needs thinking through, discussing and reviewing."* (Individual)

> *"It should not apply to all routes at the same time as there are many trains unaffected by peak hours."* (Individual)

- Another key suggestion was for a reduction in the price of fares for both time periods, but primarily during the off-peak period to optimise capacity across the day and network. Some did request cheaper peak fares.

> *"Need to encourage more occupancy of off peak services through better discounts."* (Individual)
>
> *"Off-peak fares should be more noticeably cheaper than peak-time fares. On the journeys I use, the difference is only about 40p!"* (Individual)
>
> *"Peak fares are often ridiculously expensive, and must be reduced."* (Individual)

- Many suggestions made reference to improving the provision of information for peak/off-peak restrictions.

> "*The valid times for ticket use should be printed on the tickets*." (Individual)
>
> "*Better explanations at PoS [point of sale] as to what peak/off-peak/super off-peak etc. means.*" (Individual)

- Many suggestions asked for peak/off-peak fares to reflect capacity variations, for example:

  - A price split between peak and off-peak fares when a journey occurs within both time periods; and
  - A reduced fare level if travelling against peak flow.

> "*It's very galling to be charged a peak fare for the entire journey where only a small part takes place in peak hours*" (Individual)
>
> *"Travel away from London in the morning should be considered as "off-peak" and be a lot cheaper than travel in the opposite direction."* (Individual)

- A few comments asked for an increase in fare price during peak, off-peak and super off-peak.

6.2.3   A minority of comments expressed opposition to maintaining peak and off-peak fares, reasons included:

- The belief it would encourage more use on already busy services;
- Current restrictions cause overcrowding during shoulder periods;
- Peak periods do not reflect times of highest demand; and
- The impact of increased travel cost on commuters.

"Off-peak fares seem ineffective at reducing crowding on trains. People commuting have little choice about the time at which they catch a train to get to and from work." (Individual)

"As working hours have become increasingly variable due to shift work and flexible working hours … I think off-peak and peak tickets could be abolished." (Individual)

"There should be no peak/off peak times as this means that the first off peak trains are always ridiculously busy." (Individual)

Key Points

- There is support for maintaining peak and off-peak fares, particularly by less frequent and leisure travellers.

- Maintaining peak and off-peak fares was supported primarily to avoid overcrowding on peak services and to encourage greater use of services during the off-peak, particularly if off-peak fares are reduced.

- The main suggestions for improvements to peak and off-peak fares was for more consistency in timing/restrictions across the network and greater transparency about when these apply.

7. FARES BASED ON TIME OF BOOKING

7.1 Closed Question Results

7.1.1 Respondents to the consultation were asked whether **'fares based on time of booking (e.g. fares booked in advance of the day of travel are lower than fares available on the day of travel)'** should be considered. Just under three-quarters of respondents (68%) thought this suggestion should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 6.

<p style="text-align:center">Figure 6. To what extent should 'fares based on time of booking' be considered? (n=18,958)</p>
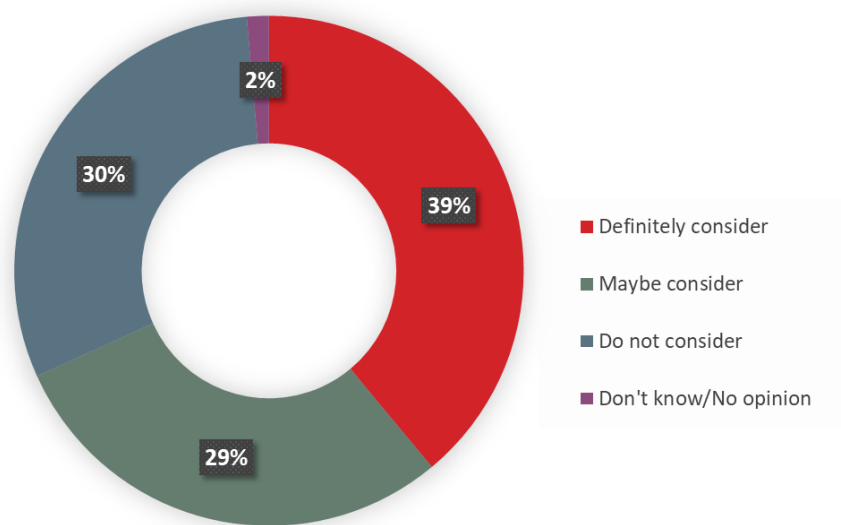
7.1.2 Respondents' views on whether fares should be based on time of booking varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

7.1.3 Key points of interest include:

- Respondents who travel less than once a week were more likely to state this this suggestion should (maybe or definitely) be considered (71%) than those who travel at least once a week (66%);
- Similarly, leisure travellers and business passengers were more likely to state that this suggestion should (maybe or definitely) be considered than commuters (71% and 70% compared with 65%, respectively); and

○ 65% of those purchasing season tickets (annual/monthly/weekly) thought this suggestion should (maybe or definitely) be considered, compared to 70% of those purchasing other ticket types.

7.2 Findings from the Open-Ended Questions

7.2.1 Of the 19,159 responses received to the consultation, 2,989 made reference to fares booked in advance and/or bought at time of travel. While the quantitative results indicated a reasonably strong preference for fares based on time of booking, the open-ended responses were not as clear and no majority view was presented.

7.2.2 A substantial minority of comments in the qualitative answers were supportive of maintaining advance and at time of travel fares, and most did not give any specific reason. Some provided caveats for improvements:

○ Most wanted a fixed discount tier for advance tickets;
○ Many wanted advance tickets for long journeys or off-peak services only;
○ Some preferred advance tickets with the belief it would guarantee a seat reservation or suggested it should;
○ Some requested a greater number of advance tickets to be made available;
○ A few suggested more flexibility of advance tickets before the day of use, for example to allow for refunds or changes to the ticket;
○ A few asked for advance tickets to be available for all routes on the network;
○ A few suggested more flexibility of advance tickets on the day of use, for example to allow for use on multiple services during a specified time period or reducing penalties for mistakes;
○ A small number wanted an extended sale period to allow purchase of advance tickets up until the day of travel; and
○ A very few opposed automatic seat reservations when purchasing advance tickets.

"Advance fares should give a max discount … e.g. 80% off the standard single/return fare at 12 weeks, and reduce by 5% for the next 6 weeks … which means at 7 weeks it is reduced by 50%." (Individual)

"Longer journeys (2+ hours) should have advanced fares, not necessary for shorter journeys." (Individual)

"Advance ticket sales should be discounted and seats should be guaranteed." (Individual)

"There should not be a limit on the number of cheap advance tickets available for a journey, and all tickets should be refundable." (Individual)

"Advance fares should always offer some kind of discount or incentive … Advance fares on all services should be available up-to 15-minutes before travel." (Individual)

7.2.3 A small number of supportive comments suggested that this fare structure would provide certainty in passenger numbers on services and encourage off-peak or leisure travel.

> *"Advance purchase reductions are an incentive for people to plan ahead where they can and adjustments to availability of these on certain trains can help to spread the passenger volume onto emptier trains."* (Individual)
>
> *"Advance sales should be rewarded as this should allow the planning allocation of coaches to a journey."* (Individual)
>
> *"Fare structures … should also encourage people to plan their journeys in advance again encouraging people to use off peak services and consider using alternative routes if these have space capacity."* (Individual)

7.2.4   Another substantial minority of comments provided suggestions and improvements for current advance and at time of travel fares without explicit support or opposition for the concept.

○   Most suggestions referred to the price difference between advance and at time of travel fares, most of which asked for a reduction in the difference and a few requesting an increase.

○   Many comments asked for changes in the flexibility of advance tickets on the day of use, for example:

  ● Allowing use of an advance ticket on multiple services, such as during a specified time period or across multiple TOCs;
  ● Allowing use of an advance ticket on the next available service when delays/cancellations during other journey legs cause a passenger to miss the service booked;
  ● Reducing or removing the penalty fare for misuse of an advance ticket resulting from a mistake; and
  ● Allowing break in journey on an advance ticket.

> *"I would like to see semi-flexible advance tickets, allowing travel on trains during a 1-2 hour departure window"* (Individual)
>
> *"Advance purchase fares should be available using multiple operators and not confined to single companies."* (Individual)
>
> *"For many markets customers reasonably expect to get a discount by committing to travel in advance. Customers currently only get such a discount by committing to inflexible 'Advance' fares – there is no discount for simply buying a flexible ticket in advance … it could be helpful to make a discount available for booking in advance, without specifying specific trains a customer must travel upon."* (Organisation)

○   Many other suggestions requested changes to the sale period of advance tickets, for example:

  ● A need for consistency in the timing of advance fares becoming available across operators;

- An extended sale period, allowing the purchase of tickets further in advance and up until/on the day of travel; and
- Making advance tickets available at all times of day.

> *"Advance fares should be available the same time in advance across all providers."* (Individual)
>
> *"I think advance fares need to be available for a period longer than 13 weeks."* (Individual)
>
> *"Advance fares should be available up to a few hours before departure on the day."* (Individual)

- Some comments made reference to the amount of advance tickets made available for purchase, of which a greater number of comments asked for an increase in quantity.

- Some other suggestions asked for more clarity and information on advance and at time of travel booking procedures and limitations, including ticket restrictions.

> *"The system of advanced fares is confusing and inconvenient."* (Individual)
>
> *"Clear notice when advance fares will be applicable."* (Individual)
>
> *"Advance fares should be better named to distinguish the fact that they are restricted to particular services, rather than just bought in advance."* (Individual)
>
> *"For walk-up tickets, there are far too many different restrictions, often with minor differences from one another."* (Individual)

- Some suggestions asked for changes in the flexibility of advance tickets before the day of use, for example allowing for refunds and change in ticket. A very small number requested less flexibility and opposed refunds or changes to advance tickets.

> *"Advance tickets should have the option to cancel it with a full refund, rather than losing the money."* (Individual)
>
> *"Get rid of charges for altering/cancelling pre-booked tickets, it costs TOCs very little to process this and restricts/penalises customers. Be flexible."* (Individual)

- A few comments referred to the following:

  - A need for advance fares to be available on all routes across the network;
  - A need for advance fares discounts to be consistent across all routes; and
  - General improvements without providing any specific detail.

> *"I get frustrated that my regular route never has a discount no matter how far in advance I buy it, I feel like these advance discounts should be streamlined across the train companies."* (Individual)

> *"Improved conditions on advance fares."* (Individual)

7.2.5   A minority of comments opposed advance and at time of travel fares, most of which did not give any specific reason and many stated that at time of travel fares are too high.

> *"Tickets bought on the day should be the same price as tickets bought in advance*." (Individual)

> *"It's bordering on criminal that two people using exactly the same train service should pay such wildly disparate amounts based upon when and where they purchased the ticket for the service."* (Individual)

Key points

⊙   There is support in principle for fares based on the time of booking, but improvements to the current system are often desirable.

⊙   Those travelling less frequently and/or for leisure purposes are more strongly in favour of fares based on time of booking than other types of traveller.

⊙   The main suggestions for changes to advance and at time of booking fares referred to price differences, primarily asking for more structure, in addition to requests for greater flexibility in Advance fares.

8. FARES BASED ON THE AMOUNT OF FLEXIBILITY REQUIRED

8.1 Closed Question Results

8.1.1 Respondents to the consultation were asked whether **'fares based on the amount of flexibility required (e.g. fares for booking travel on a specific train service are lower)'** should be considered. Just under three-quarters of respondents (74%) thought this suggestion should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 7.

Figure 7. **To what extent should 'fares based on the amount of flexibility required' be considered? (n=18,933)**
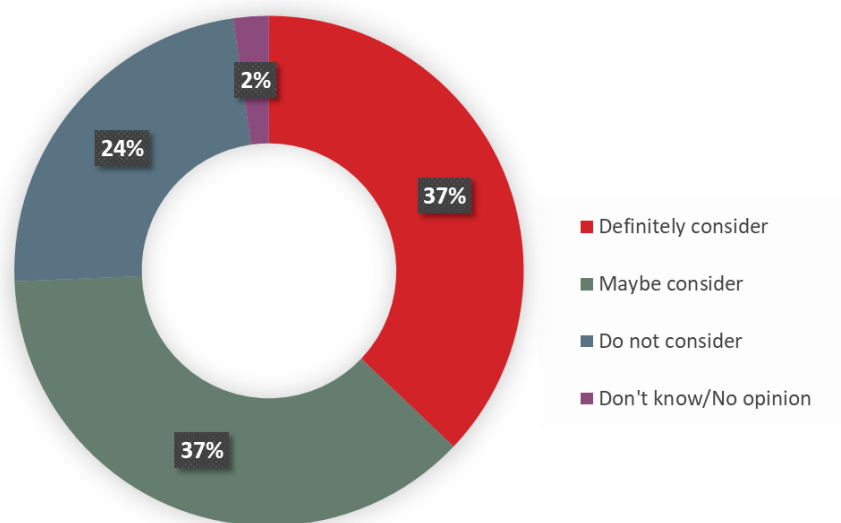
8.1.2 Respondents' views on whether fares should be based on the amount of flexibility required varied significantly by the following respondent characteristics:

- Whether they were responding on behalf of an organisation, or as an individual;
- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Gender; and
- Region lived in.

8.1.3 Key points of interest include:

- Organisations were more likely to state that this suggestion should (maybe or definitely) be considered (79%) than individuals (76%);
- 74% of commuters stated that this suggestion should (maybe or definitely) be considered, compared to 77% of those travelling for other purposes;

- Similarly, 74% of those using Season Tickets (annual/monthly/weekly) stated this suggestion should (maybe or definitely) be considered, compared to 77% of those who used other types of tickets; and
- Respondents who use smart ticketing were more likely to state this suggestion should (maybe or definitely) be considered (78%) than those who do not use smart ticketing (72%).

8.2 Findings from the Open-Ended Questions

8.2.1 Of the 19,159 responses received to the consultation, 327 made reference to fares based on the amount of flexibility required. While the quantitative results indicated a strong preference for fares based on flexibility, the qualitative findings were less clear, with an equal number of supportive and opposing comments. Of those who support fares based on flexibility:

- The key suggestion was discounted tickets tied to specific trains; and
- A few made reference to discounts for tickets tied to specific operators.

"There should be significant savings for people who are willing to travel … on specified trains." (Individual)

"There are some tickets that can be cheaper if you travel with a certain TOC." (Individual)

"Rail companies could run low-cost offers, but the user would only be able to travel on the exact date and time and service they bought the ticket for." (Individual)

8.2.2 Those who oppose do not agree with tickets for specific train times, routes or operators. Furthermore, opposition was shown for the increase in fares for greater flexibility.

"Remove the idea of booking a ticket for a specific train. This is ridiculous. Being penalised for travelling on a half-empty train that may leave earlier than the one you booked is completely absurd, and a rip-off." (Individual)

"Penalising flexible travel gives problems for anyone with uncertain plans." (Individual)

"My main problem is … the expense of purchasing a flexible ticket … I am fed up with being told that I cannot board a train that is going where I want to go ... I am forced to buy non-flexible tickets and spend hours in train stations waiting for the 'specified' train while many other empty trains pass me by! Either that or I have to pay extortionate costs if I miss my specified train." (Individual)

Key Points

○ In the closed questions, there was considerable support for fares based on the amount of flexibility required to be considered.

○ However, the findings from the open questions were less clear, with an equal number of supportive and opposing comments.

○ Respondents were particularly supportive of a reduction in fares for slow, less frequent services; whilst opposition was shown towards an increase in fares for faster, more frequent services.

○ Passengers who buy Advance tickets showed stronger support for fares based on the amount of flexibility.

9. FARES DESIGNED SO THAT IT IS UNNECESSARY TO BUY A 'SPLIT-TICKET' IN ORDER TO GET THE CHEAPEST DEAL

9.1 Closed Question Results

9.1.1 Respondents to the consultation were asked whether **'fares designed so that it is unnecessary to buy a 'split-ticket' in order to get the cheapest deal'** should be considered. Nearly three-quarters of respondents (73%) thought this suggestion should 'maybe' or 'definitely' be considered, with nearly three-fifths (58%) selecting 'definitely' consider. A full breakdown of responses to this question is provided in Figure 8.

Figure 8.   To what extent should 'fares designed so that it is unnecessary to buy a 'split-ticket' in order to get the cheapest deal' be considered? (n=19,036)
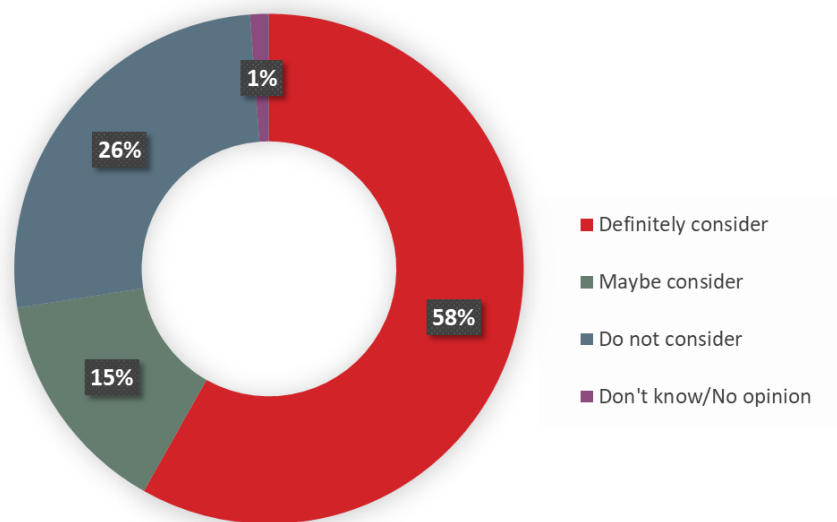
9.1.2 Respondents' views on whether fares should be designed so that it is unnecessary to buy a split-ticket to get the cheapest deal varied significantly by the following respondent characteristics:

- Whether they were responding on behalf of an organisation, or as an individual;
- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

9.1.3 Key points of interest include:

- Organisations were more likely to state that this suggestion should (maybe or definitely) be considered (83%) than individuals (73%);
- Respondents who travel by rail at least once a week were more likely to state this suggestion should (maybe or definitely) be considered (81%) than those who travel less often (68%); and
- Commuters were more likely to state that this suggestion should (maybe or definitely) be considered (84%) than those travelling for other purposes (70%).

9.2 Findings from the Open-Ended Questions

9.2.1 Of the 19,159 responses received to the consultation, 1,298 respondents made reference to split ticketing. The majority of these comments supported removing the need for split-ticketing, and many explicitly stated this was for transparency in finding the cheapest fare.

> *"The system needs to be more transparent to avoid split ticketing. The current system disadvantages those who don't know how to interrogate the system to find the best deal."* (Individual)

9.2.2 A substantial minority wanted split-ticketing to remain, with some suggesting they only wanted the ability to do this until fare reform renders split-ticketing unnecessary to get the cheapest fare, and others suggesting the current system of split-ticketing needs improvement.

> *"I like things like ticket splitting, because it gives options to the people who need to find cheaper tickets. I'm prepared to change three times and spend half a day on a train if it saves me £50."* (Individual)

Key points

- There is clear opposition to split-ticketing for obtaining the cheapest fare.

- More frequent travellers and commuters are more strongly in favour of fares designed to remove the need for split-tickets.

10. FARES BASED ON ENCOURAGING TRAVEL TO FILL UP EMPTY SEATS

10.1 Closed Question Results

10.1.1 Respondents to the consultation were asked whether **'fares based on encouraging travel to fill up empty seats (e.g. more last-minute deals to fill available seats)'** should be considered. Over three-quarters of respondents (78%) thought that this decision should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 9.

Figure 9. To what extent should 'fares based on encouraging travel to fill empty seats' be considered? (n=19,003)
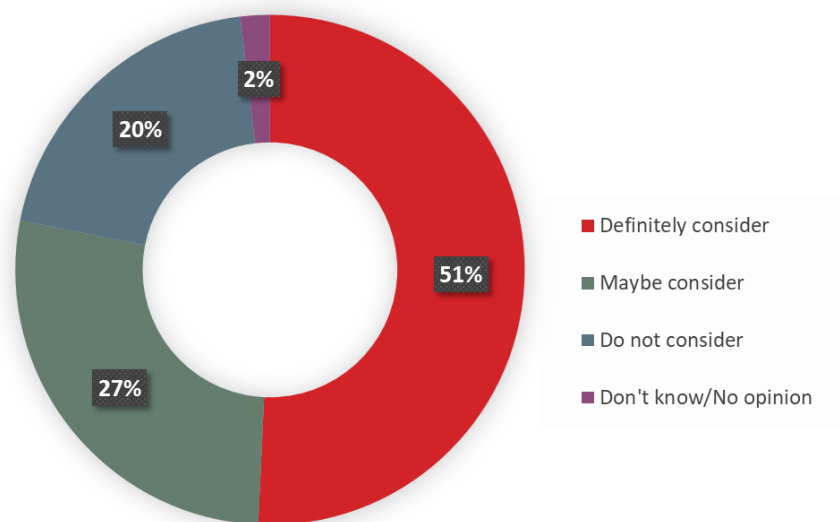
10.1.2 Respondents' views on whether fares should be based on encouraging travel to fill up empty seats varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region.

10.1.3 Key points of interest include:

- 77% of those travelling at least once a week thought this suggestion should (maybe or definitely) be considered, compared to 82% of those travelling less frequently;
- Similarly, 75% of commuters thought this suggestion should (maybe or definitely) be considered, compared to 81% of those travelling for other purposes;

- 73% of those who purchased a season ticket (annual/monthly/weekly) thought this suggestion should (maybe or definitely) be considered, compared to 80% of those who purchased other ticket types; and
- Respondents who use smart ticketing were more likely to state this suggestion should (maybe or definitely) be considered (81%) than those who do not use smart ticketing (76%).

10.2 Findings from the Open-Ended Questions

10.2.1 Of the 19,159 responses received to the consultation, 687 respondents made reference to fares based on encouraging travel to fill up empty seats. The majority of comments were supportive of this suggestion, with many making particular reference to wanting 'last-minute' discounts.

> *"Pricing needs to reflect how busy trains are: i.e. Cheaper when trains are emptier."* (Individual)
>
> *"Last-minute discounts on walk-up fares to fill empty seats on quiet trains is a good idea."* (Individual)

10.2.2 A substantial minority indicated a specific preference for fare levels to be based on demand.

> *"Specific pricing could be more accurately applied to individual services to help manage demand. (e.g. 0600 from Cardiff to Bristol should not be "peak" and priced the same as the 0800. This would encourage wider spread use of the available trains, rather than cramming onto individual services)."* (Individual)

10.2.3 A small minority of comments opposed the principle of fares based on encouraging travel to fill up empty seats, including the availability of last-minute discounts.

> *"Most importantly, demand should never ever influence ticket prices. Instead, train companies and Network Rail should be required to provide the capacity needed to serve that demand. No trains should ever be regularly overcrowded."* (Individual)

Key points

- There is considerable support for fares to fill up empty seats and fares based on demand to be considered, primarily for 'last-minute' discounts.

11. FARES BASED ON LOYALTY TO REGULAR TRAVELLERS

11.1 Closed Question Results

11.1.1 Respondents to the consultation were asked whether '**fares based on loyalty to regular travellers (e.g. regular travellers can earn discounts for future purchases)**' should be considered. Over half of respondents (70%) thought this suggestion should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 10.

Figure 10.   To what extent should fares 'based on loyalty to regular travellers' be considered? (n=18,926)
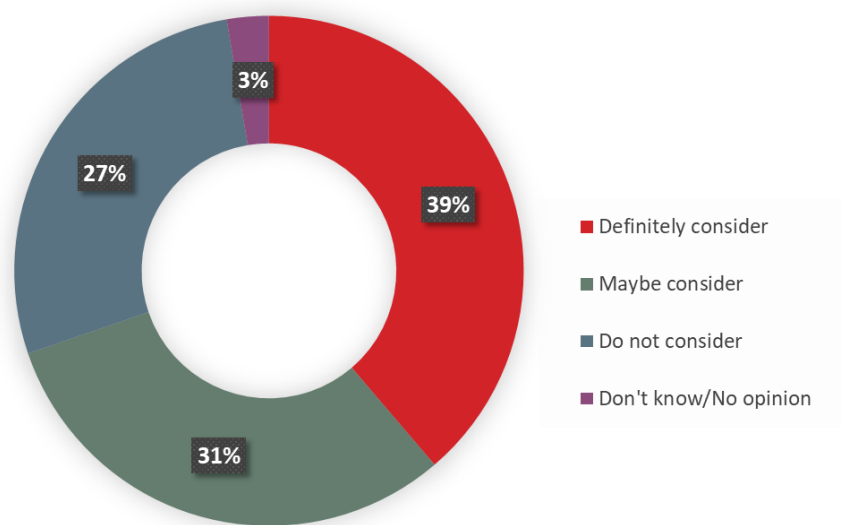
11.1.2 Respondents' views on whether fares should be based on loyalty to regular travellers varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

11.1.3 Key points of interest include:

- Respondents who travel at least once a week were more likely to state this suggestion should (maybe or definitely) be considered (78%) than those who travelled less frequently (67%);
- Commuters were more likely to state this suggestion should (maybe or definitely) be considered (80%) than those travelling for other reasons (68%);

- Respondents who purchase season tickets (annual/monthly/weekly) were more likely to state this suggestion should (maybe or definitely) be considered (83%) than those who purchase an any other type of ticket (71%);
- Respondents who use smart ticketing were more likely than those who do not use it to think this suggestion should (maybe or definitely) be considered (74% compared with 66%); and
- Those under 55 years old were more likely to state this suggestion should (maybe or definitely) be considered (76%) than those aged 55 years and over (68%).

11.2   Findings from the Open-Ended Questions

11.2.1   Of the 19,159 responses received to the consultation, 526 respondents made reference to fares based on loyalty to regular travellers. The vast majority of comments were supportive of this suggestion.

- Some of those providing supportive comments did so with subsets of regular travellers in mind. These included:

  - Season ticket holders/commuters;
  - E-ticket/mobile phone ticket users; and
  - Off-peak users.

"All should be bookable online with loyalty accounts which build up for points towards free journeys (air miles scenario)." (Individual)

"I think that regular commuters should be rewarded by getting extra savings if they purchase season tickets." (Individual)

"Increased technology can be used for price bands (if you use a service a set number of times - you get allocated to any benefits / reduction in fares)" (Individual)

- A few respondents caveated their support with reference to the need for a nationally consistent scheme.

"A loyalty scheme please - but not a complicated one that is per TOC." (Individual)

11.2.2   A small minority of respondents were in opposition to fares based on loyalty to regular travellers.

"I disagree with loyalty discounts as this would discourage people from making journeys they have not made before as they would be prohibitively expensive." (Individual)

11.2.3   Additionally, a small minority of respondents indicated that fares based on loyalty to regular travellers should not penalise infrequent rail users.

"It is all very well offering loyalty incentives to existing customers but if in doing so you increase the price for the infrequent/new users you will provide a big disincentive to use rail for the vast majority of the population who rarely use rail." (Individual)

Key points

O   There is strong support for fares based on loyalty to be considered, particularly by regular travellers, commuters and young people (16-25 years old).

O   Suggestions for loyalty asked for a fair system, consistent across train operating companies and one which does not penalise infrequent travellers.

12. FARES WHICH PROVIDE SAVINGS FOR CERTAIN GROUPS IN SOCIETY

12.1 Closed Question Results

12.1.1 Respondents to the consultation were asked whether **'fares which provide savings for certain groups in society (e.g. lower fares for certain groups in society such as young people, older people, people with disabilities)'** should be considered. Around four-fifths of respondents (82%) thought this suggestion should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 11.
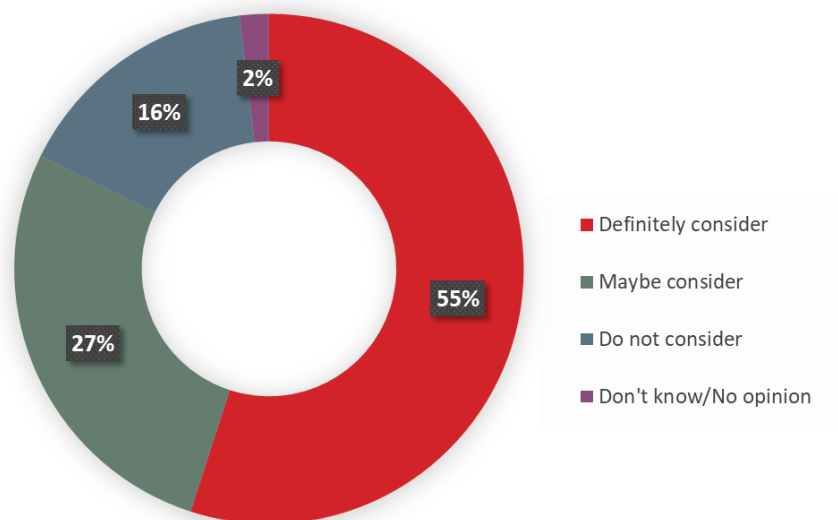
12.1.2 Respondents' views on whether fares should provide savings for certain groups in society varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age; and
- Gender.

12.1.3 Key points of interest include:

- 80% of respondents travelling at least once a week thought that this suggestion should (maybe or definitely) be considered, compared to 86% of those travelling less often;

○ Similarly, 79% of commuters thought this suggestion should (maybe or definitely) be considered, compared to 86% of those travelling for other purposes;

○ 75% of those who purchase season tickets (annual/monthly/weekly) thought this suggestion should (maybe or definitely) be considered, compared to 84% of those who purchase other ticket types; and

○ Respondents aged 60 years and older were more likely to state that this suggestion should (maybe or definitely) be considered (91%) than those aged 16-59 (79%).

12.2 Findings from the Open-Ended Questions

12.2.1 Of the 19,159 responses received to the consultation, 1,770 made reference to fares which provide savings for certain groups in society. The majority of comments were supportive of discounted rail fares for certain groups in society, but varied between types of groups.

○ Age related groups gained the most support for discounted fares, of which:

• Most comments supported discounts for senior citizens, generally with no specific age bracket or referring to the current age for eligibility which is 60. A small number of comments requested the age for eligibility for senior citizen discount to be revised or increased, e.g. starting at 55, 65, 70 or 75;

• Many comments were in favour of discounts for young people, typically this group encompassed those aged 16-25, but some viewed this to be for 16-18 or 26-30;

• Some comments requested discounted fares for children; and

• A few comments wanted discounts for those between the ages of 25-60 or referred to as 'Middle Age'.

"School children and seniors should not be penalised for travelling at peak times - their ticket prices should be maintained at a discounted rate." (Individual)

"Young persons … and senior citizens should pay less." (Individual)

"The young-person's railcard should be expanded to the age of 30." (Individual)

"Why does everyone get a railcard except the 30-60 age group? Arguably they need it just as much." (Individual)

○ Other key comments were supportive more generally, with:

• Many supporting discounts for all through the implementation of a national railcard, including a small number requesting the cost of such a railcard to vary for different groups in society;

• A few preferred regional specific network railcard discounts; and

• Very few asked for a set number of free journeys for all passengers.

"Get a national rail card that is non-discriminatory." (Individual)

"I think the German "Bahncard 25/50/100" system is really good and could be emulated here; anyone can purchase a railcard and they receive a discount on rail fares, depending on the card purchased." (Individual)

○ Many comments were supportive of discounts for those with disabilities, some including any carers accompanying disabled passengers on services and a few asking for changes to eligibility.

"I'd keep railcards for disabled." (Individual)

"Discounted rail fares MUST be made available to unpaid carers, regardless of whether they are travelling with the person they care for; though carers are covered on some disabled discount fares, this is useless if carers are travelling frequently to visit the person they care for." (Individual)

"Expand disabled railcard to include long term health conditions and invisible disabilities such as ME and chronic pain." (Individual)

○ Many comments were supportive of discounts for groups, such as families or friends.

○ Some comments were supportive of discounts relating to status of employment, level of income and profession. Such as:

- Students, self-employed and unemployed;
- Low income groups and those on benefits; and
- Armed forces personnel, civil servants and former/current rail staff.

"I think fares should be lower for those in education, or looking for work." (Individual)

"Expand discounts (railcards etc) to benefit people on low incomes." (Individual)

"Provide a general discount to those that are in education (e.g. children, students or mature), armed forces." (Individual)

○ Some comments were supportive of discounts alongside suggestions for changes in the terms and conditions, such as:

- A review of discount levels, generally requesting an increase;
- Receiving discounts without the need to have a railcard;
- Making the procedure to buy or renew a discount card easier; and
- A need for railcard discounts to be applicable at all purchase points and channels.

"The principle of railcards offering discounts for different sections of society is a good idea. However, the system should be reformed so that it unnecessary for the passenger

to carry their railcard with them when they travel as this simply causes problems."
(Individual)

○ A few comments were supportive of discounts for regular rail users, such as season ticket holders and commuters.

"Discounts on other journeys if you hold a season ticket." (Individual)

12.2.2 A minority of comments gave suggestions for changes to discounted rail fares without any explicit support or opposition.

○ Most comments wanted discounts to be easier to obtain and for railcard restrictions be reviewed, for example:

- To be able to purchase discounted tickets using a railcard at any time of the day;
- To apply railcard discounts across all purchase points and channels;
- To have more transparency in obtaining discounted rail fares; and
- To extend the validity period of railcards.

"Consider … railcard discounts on very early trains e.g. before 6:30." (Individual)

"Restrictions on Railcards could also be lifted as well (retract 'Minimum fare') which would be helpful to thousands of customers I would think." (Individual)

"Ticket machines often are unable to cope with railcards … Again it's not always possible to put in a railcard on a website." (Individual)

"Timings of which railcard do not operate should be made clear on purchase rather than on the train when it is too late." (Individual)

○ Many comments requested a change to discount eligibility without specifying any particular groups, of which more comments asked for more groups in society to be eligible in comparison to some asking for less to be eligible.

"Railcards should be to a wider demographic than currently." (Individual)

"The number of railcards should be reduced and the savings the industry makes from this should be used to lower fares across the board." (Individual)

○ Some comments wanted more consistency for discounts across different operating companies and for the amount of discount received from different railcards.

"Make railcard discounts worthwhile with more consistent terms across the range of railcards." (Individual)

12.2.3   A small minority of comments opposed fare discounts for certain groups in society, generally with the argument that rail fares should be the same for everyone, or that certain groups should not receive them.

Key points

O   There is considerable support for discounts for certain groups in society to be considered.

O   Support was greatest for senior citizens and those with disabilities to receive a discount.

O   The key suggestion for improvements to current discounts was for fewer restrictions on when railcards can be used.

13. FARES WHERE BOTH THE OUTWARD AND RETURN JOURNEY FARES ARE BASED ON TIME OF DAY TRAVELLED

13.1 Closed Question Results

13.1.1 Respondents to the consultation were asked whether **fares that reflect both the outward and return journey time of travel**[1] should be considered. Around four-fifths of respondents (82%) thought this suggestion should 'definitely' or 'maybe' be considered. A full breakdown of responses to this question is provided in Figure 12.

<p style="color:red">Figure 12.   To what extent should 'fares where both the outward and return journey fares are based on time of day travelled' be considered? (n=18,975)</p>
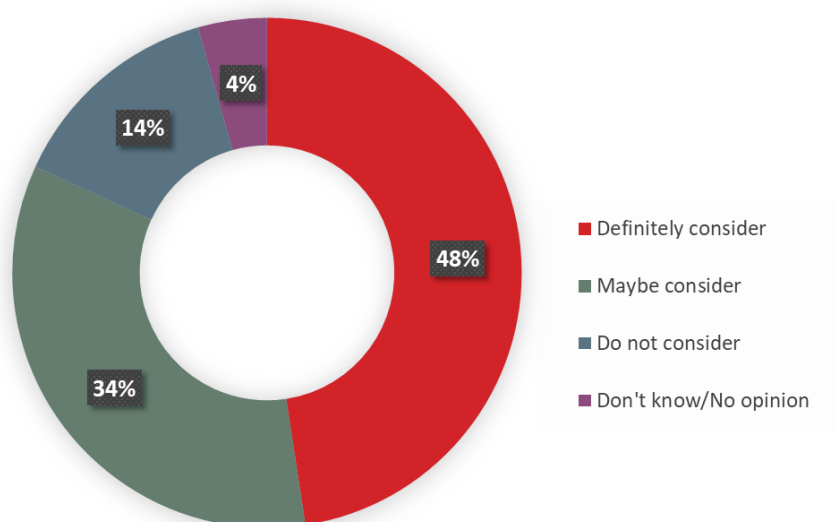
13.1.2 Respondents' views on whether outward and return fares should be based on time of day travelled varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age; and
- Gender.

13.1.3 Key points of interest include:

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[1] '**Fares where both the outward and return journey fares are based on time of day travelled** (e.g. return tickets replaced with easily combined one-way tickets, purchased together, enabling both outward and return journey fares to reflect time of travel, e.g. peak ticket for outward journey, off-peak ticket for return part of the journey).'

- 84% of those travelling at least once a week thought that this suggestion should (maybe or definitely) be considered, compared to 87% of those travelling less frequently;
- Similarly, 83% of commuters thought that this suggestion should (maybe or definitely) be considered, compared to 86% of those travelling for other purposes;
- 83% of those who purchased a season ticket (annual/monthly/weekly) thought this suggestion should (maybe or definitely) be considered, compared to 86% of those who purchased other ticket types;
- Respondents who use smartcards, contactless bank cards and mobile phones were more likely to state this suggestion should (maybe or definitely) be considered (87%) than those who do not use smart ticketing (82%); and
- 84% of those aged under 55 years thought that this suggestion should (maybe or definitely) be considered, compared to 87% of those aged 55 years and over.

13.2   Findings from the Open-Ended Questions

13.2.1   Of the 19,159 responses received to the consultation, 760 made reference to fares where both the outward and return journey are based on time of day travelled. The majority of comments gave suggestions for changes to the current single and return fare structure without explicit support or opposition.

- Frequently raised suggestions sought for changes in the price difference between singles and returns fares, for example:

  - A need for singles to be half the price of returns;
  - A need for singles to be cheaper than returns (without specifying how much cheaper); and
  - A need for returns to be cheaper than two singles.

> *"If I buy a Return ticket, it should be the same price as two singles."* (Individual)
>
> *"I don't understand how single tickets are practically the same price as returns … I think this should be costed more fairly and single fares should in turn be cheaper."* (Individual)
>
> *"It would be good to have better value return tickets - it is illogical and perhaps misleading that return tickets are often more expensive than two single tickets."* (Individual)

- Other comments requested changes in single and return fare limitations and restrictions, for example:

  - To allow the purchase of a return fare which consists of two single fares reflecting time of travel, as supported in the quantitative findings;
  - A need for all returns fares to have the flexibility of an open return ticket and to cost the same as a day return;
  - A need for return fares to cost the same regardless of the direction of an outward journey;
  - A need for open return tickets to allow a break in journey; and
  - A need for single fares to be valid for one month from purchase.

> *"Split ticket fares e.g. peak outbound and off-peak return would be great."* (Individual)
>
> *"I personally think all tickets should be 'open outward and return' journeys. People should have the right to buy tickets to and from their desired destination and to arrive / depart whenever they like."* (Individual)

13.2.2   A substantial minority of comments support the current fare structure of maintaining single and return fares, many of which showed preference for open return tickets and requested greater availability of these across different routes on the network.

> *"Tickets should be easier to understand for people travelling by rail. Simple Single and Return ticket types."* (Individual)
>
> *"In favour of just a single or return price."* (Individual)
>
> *"There should always be a return available not restricted, as on my route, to a day return."* (Individual)

13.2.3   A minority of comments oppose the current fare structure of maintaining single and return fares, of which a very few asked for an exception to keep day returns whilst a few others specifically opposed open return tickets.

> *"Scrap return tickets."* (Individual)
>
> *"Return tickets should be abolished and only singles should exist to simplify things"* (Individual)

Key points

O   There was strong support for fares based on enabling both outward and return journey fares to reflect time of travel to be considered.

O   Suggestions for improvements to current single and return fares requested consistency in pricing, primarily asking for the price of singles to be proportionate to the price of returns.

14. TICKET PURCHASING REFORM OVERVIEW

14.1 The Need for Reform

14.1.1 Respondents to the consultation were asked whether they thought it was **necessary to reform the ways in which tickets can be purchased**. Around two-thirds of respondents (65%) thought it was either very or quite necessary to reform the way tickets can be purchased. A full breakdown of responses to this question is provided in Figure 13.

Figure 13. To what extent is it necessary to reform the ways in which tickets can be purchased? (n=19,013)
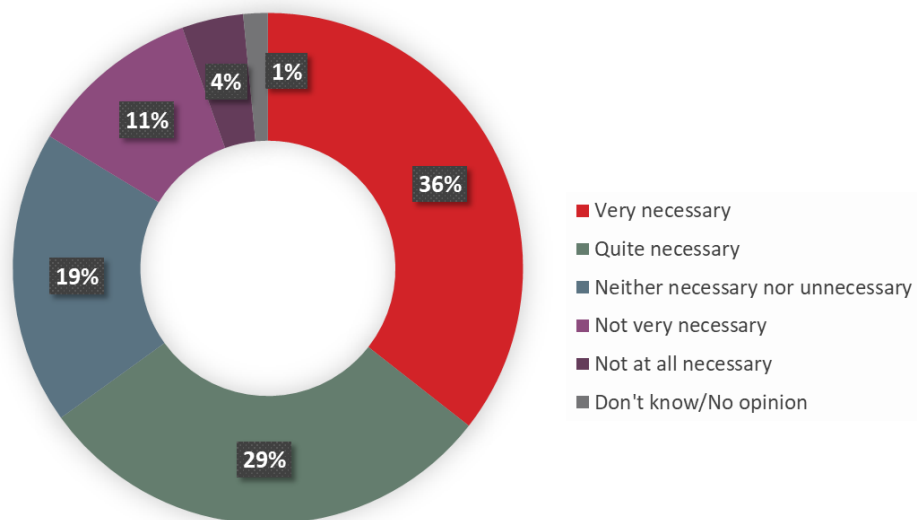
14.1.2 Respondents' views on whether ticketing reform should be considered varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

14.1.3 Key points of interest include:

- Those travelling at least once a week were more likely than those travelling less often to think that ticket purchasing needs to be reformed (70% compared with 64%, respectively);
- Commuters were more likely than those travelling for other purposes to think that ticket purchasing needs to be reformed (73% compared with 64%, respectively);

○ Respondents who purchased a Season Ticket (annual/monthly/weekly) were more likely than those who purchased other ticket types to think that ticket purchasing needs to be reformed (74% compared with 66%, respectively); and

○ Respondents who use smart ticketing were more likely than those who do not use smart ticketing to think that ticket purchasing needs to be reformed (68% compared with 61%, respectively).

14.2   Findings from the Open-Ended Questions

14.2.1   Of the 19,159 responses received to the consultation, 881 respondents made reference to the general need for ticketing reform. The majority of comments suggested that reform was needed, and of these a minority noted that reform would reduce fare evasion.

○ The main reason given for thinking reform was necessary was to improve the transparency surrounding the different ticketing and purchasing channels, both to:

● Improve the ease of ticketing and purchasing channels, in general; and
● Improve the ease of selecting the cheapest fare, irrespective of which channel is used to purchase the ticket.

○ A minority of comments related to improving consistency of ticketing and purchasing channels across operators.

"Often it is very difficult to know which ticket to buy based on the options on ticket machines and sometimes staff in the ticket office don't sell you the cheapest ticket, probably because the system is so complicated." (Individual)

"RDG should lead a standardised process for ticket purchasing across the industry … with each operator having the chance to create a front-end overlay either as an app or smartcard." (Individual)

"There needs to be a greater consistency in purchasing options - too many variations between companies." (Individual)

14.2.2   A minority of responses suggested that the current ticketing and purchasing system is satisfactory and therefore did not require reform.

"I think the current ticket purchase setup is fine." (Individual)

"No issues here as it there are plenty of easy and simple ways to purchase tickets." (Individual)

Key points

○ There is support for ticketing and purchasing reform, particularly from commuters and season ticket holders.

○ Respondents particularly requested greater overall transparency and ease of use.

15. SHOULD PURCHASE CHANNEL AFFECT PRICE

15.1 Closed Question Results

15.1.1 Respondents were asked whether '**tickets should cost the same however they are purchased'**. More than eight in every ten respondents (84%) thought that tickets costing the same across purchase channels should 'maybe' or 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 14[2].

Figure 14.   Should a ticket cost the same however you buy it? (n=11,931)

Legend:
- Definitely consider
- Maybe consider
- Do not consider
- Don't know/No opinion

Values shown: 2%, 14%, 17%, 67%
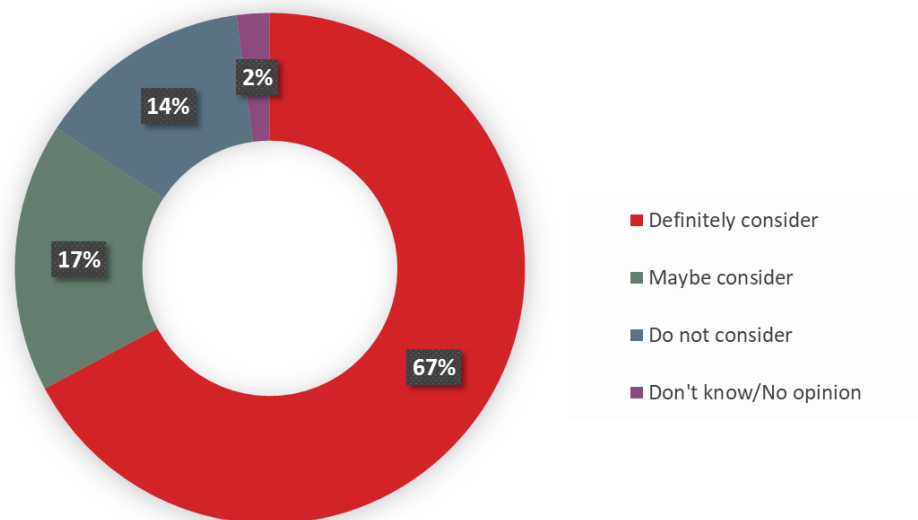
15.1.2 Respondents' views on whether fares should cost the same however they are purchased varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

15.1.3 Key points of interest include:

- Respondents who do not use smart ticketing were more likely than those who do to think that tickets costing the same across purchase channels should (maybe or definitely) be considered (88% compared with 85%); and
- 83% of respondents aged 16 to 34 thought that tickets costing the same across purchase channels should (maybe or definitely) be considered, compared to 87% of those aged 35 years and older.

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[2] Please note, due to a question wording change that occurred on 17th July 2018, only data collected after this date is included in the closed question results for this chapter.

15.2 Findings from the Open-Ended Questions

15.2.1 Of the 19,159 responses received to the consultation, 2,224 respondents made reference to purchase channel impacting the cost of the ticket. The majority of comments indicated support for ticket price remaining the same regardless of purchase channel, with some of these explaining this was to ensure no rail users are discriminated against.

> *"All ticket prices should be the same price it should not matter how they are purchased."* (Individual)
>
> *"People should not be punished by paying more if they do not have smart phones, apps, laptops, printers etc."* (Individual)

15.2.2 A substantial minority of comments indicated there should be variation in ticket price dependent on the purchase channel. Key areas included:

- A preference for cheaper fares if purchased:

  - As an e-ticket;
  - Online; and/or
  - On a mobile phone;

- Ticket price should reflect operator costs.

> *"Online and electronic ticketing should be slightly cheaper as we are helping to save on paper by reducing the need to print tickets."* (Individual)
>
> *"Charge people for the costs they impose. Ticket offices are expensive so tickets bought through them should probably cost more."* (Individual)

Key points

- There is strong support for tickets to cost the same regardless of purchase channel, especially to make sure cheaper fares are accessible to all passengers.

- However, there was some support for tickets to be cheaper if purchased as an e-ticket or online to reflect lower operating costs for these channels.

16. E-TICKETS AND CAPPING

16.1 Closed Question Results

16.1.1 Respondents to the consultation were asked whether **smart or electronic tickets, with the potential for a 'price cap'** should be considered[3]. The vast majority of respondents (90%) thought this suggestion should 'definitely' or 'maybe' be considered, with over two-thirds (68%) stating it should 'definitely' be considered. A full breakdown of responses to this question is provided in Figure 15.

Figure 15.   To what extent should 'a smart or electronic ticket, with price capping' be considered? (n=19,016)
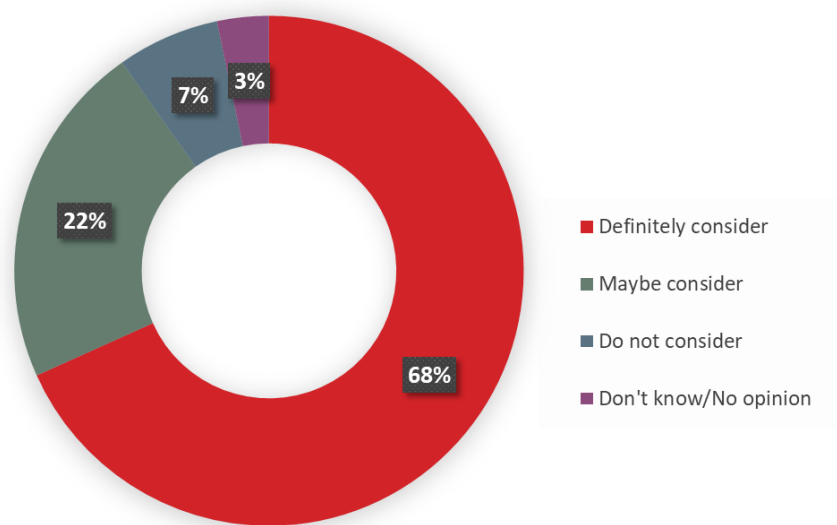
16.1.2 Respondents' views on a smart or electronic ticket, with price capping, varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

16.1.3 Key points of interest include:

---

[3] The exact wording of the question was: 'Passengers who make the same journey on a regular basis could have a smart or electronic ticket and pay for each journey that they make. Once the total cost of all journeys reaches a maximum amount they won't have to pay any more for the rest of the week, month or year. This is called a 'price cap'. The benefit of a 'price cap' is that passengers automatically get the best value fare for each individual journey, and only pay for the travel that they use.'

- Respondents who travel at least once a week were more likely to state that this suggestion should (maybe or definitely) be considered (95%) than those who travel less frequently (92%);
- Commuters were more likely to state that this suggestion should (maybe or definitely) be considered (96%) than those travelling for other purposes (92%);
- Respondents who purchase a Season Ticket (annual/monthly/weekly) were more likely to state this suggestion should (maybe or definitely) be considered (97%) than those who purchase other ticket types (93%);
- Respondents who use smart ticketing were more likely to state this suggestion should (maybe or definitely) be considered (95%) than those who do not use smart ticketing (90%); and
- Respondents aged 16-54 years old were more likely to state this suggestion should (maybe or definitely) be considered (96%) than those who were aged 55 years and older (91%).

16.2 Findings from the Open-Ended Questions

16.2.1 Of the 19,159 responses received to the consultation, 3,511 respondents made reference to e-tickets, smart cards, mobile ticketing, contactless payment and fare capping. This area was the most frequently commented on section of the consultation that was prompted on.

E-Tickets

16.2.2 The majority of comments in relation to e-tickets were supportive, some of which were caveated, with key points raised including:

- E-tickets should be cheaper than tickets purchased through other channels (for further discussion see Chapter 15);
- A nationwide e-ticketing system is required if it is to be successful;
- Improvements to functionality are required, such as compatibility with season tickets and fare capping.

"Greater discounts for electronic purchases." (Individual)

"There should be electronic versions of tickets available via a system for the whole network." (Individual)

"Digital tickets are a must, especially for season ticket holders." (Individual)

16.2.3 A minority of comments offered suggestions or requested improvements to e-tickets without stating support or opposition. Key areas included:

- Improvements to the purchasing system, such as:

  - Consistency across operators;
  - Centralised purchase platform;
  - Providing a back-up system;
  - Greater availability of fares as e-tickets.

- Improvements to the functionality and flexibility of e-tickets and their use, such as:

  - Updates to ticket barriers to accept e-tickets;
  - Ability to transfer e-tickets;
  - Cheapest fare to be available as e-tickets;

- Unspecified improvements to e-tickets.

> *"A common platform for ticket purchase and on-device e-ticket management, rather than a separate app for each TOC."* (Individual)
>
> *"All fares should always be available as electronic tickets."* (Individual)
>
> *"Station infrastructure must be able to accommodate any changes in ticket types, travelling with 'paperless' tickets at the moment is not very convenient and adds delays."* (Individual)

16.2.4 A small minority of comments were in opposition to e-tickets; some reasons for this were provided including concerns relating to accessibility and data security.

> *"It is discriminatory to rely on electronic devices. You need a device to facilitate this, not everyone owns one."* (Individual)
>
> *"Electronic and online purchasing is open to fraudulent use, so this method should be scrapped."* (Individual)

Mobile phones

16.2.5 The majority of comments were supportive of mobile phone ticketing. Some supportive comments were caveated. Points raised included:

- Improvements to purchasing, allowing app or online account purchases;
- Mobile phone tickets should be cheaper than tickets purchased through other channels (for further discussion see Chapter 15);
- An update to ticket barriers to accept mobile phone tickets;
- A nationwide mobile phone ticketing system is required for its success;
- The reduction of station purchase queueing times;
- A centralised purchase platform;
- Improvements to functionality, such as compatibility with season tickets and railcards; and
- Improvements to purchasing, such as allowing mobile phone ticket purchasing on train.

> *"Mobile is the future. Tickets should be stored in Apple Wallet / Google Wallet with NFC/QR code [Near-Field Communication or Quick Response code] used to provide the ticket details. Railcards could be added to my digital account too."* (Individual)

> *"I buy tickets on my phone all the time but what a nightmare trying and generally failing to get through the barriers."* (Individual)
>
> *"Mobile tickets need to be available on all TOCs, for all possible fares. No more queueing up to buy or collect paper tickets."* (Individual)

16.2.6   A substantial minority of comments offered suggestions or requested improvements to mobile phone tickets without stating support or opposition. Key areas included:

- Improvements to the purchasing system such as:

  - Obtaining mobile phones tickets through an app or online account;
  - Providing a back-up system;
  - Centralised purchase platform;
  - Greater availability of fares on mobile phones;
  - Consistency across operators.

- Improvements to the functionality and flexibility of mobile phone tickets and their use, such as:

  - Updates to ticket barriers to accept mobile phone tickets;
  - Cheapest fare to be available on mobile phones.

- Unspecified improvements to mobile phone tickets.

> *"It makes sense for [mobile tickets] to be cheaper … as long as there was a sympathetic system in place for when things go wrong - e.g. if your phone battery died on a long journey."* (Individual)
>
> *"Make mobile phone ticket purchase easier."* (Individual)

16.2.7   A minority of comments were in opposition to mobile phone ticketing. The main issues included:

- Concern that the mobile phone battery will run out;
- Lack of accessibility for those who do not want to/cannot use smart phones;
- Loss of signal to retrieve ticket.

> *"Not everybody has smart phones … Not everybody has an internet connection … People in my local area panicked recently when there was a rumour … you would have to buy tickets on your smartphone - so many people don't use them. I wouldn't want to, even if I had a smartphone - suppose, for example, the phone stops working or the battery goes flat."* (Individual)

Smart Cards

16.2.8   The majority of comments were supportive of tickets held on smart cards. Some supportive comments were caveated, with key points raised including:

- A nationwide smart card system is required for its success;
- Improvements to functionality, such as compatibility with season tickets, railcards and fare capping;
- Integration of smart cards with other modes of public transport;
- Smart cards should be cheaper than tickets purchased through other channels.

"We should have a unified smart ticketing nationwide across all train and bus operators nationwide instead of stupid fragmentation of smartcard schemes with no interoperability across train operating companies." (Individual)

"It would be great to have a smart ticket that calculates the best value fare depending on journey used, that is then charged at the end of the journey." (Individual)

16.2.9   A minority of comments offered suggestions or requested improvements to smart cards without stating support or opposition. Main suggestions included:

- A nationwide smart card system;
- General improvements and improvements to the purchasing of smart card tickets via an online account;
- A smart card system which guarantees fare capping.

16.2.10   A small minority of comments were in opposition to smart cards.

"Smartcards are an evolutionary dead end. If I've got to carry a specialist card it might as well be a paper ticket." (Individual)

Contactless Bank Cards

16.2.11   The majority of comments were supportive of payment using contactless bank cards. Some supportive comments were caveated, with key points raised including:

- Improvements to functionality, such as compatibility with railcards and fare capping;
- A nationwide contactless bank card system is required for its success;
- Contactless bank card tickets should be cheaper than tickets purchased through other channels.

"Contactless seems to be the way to go with daily capping for more "local" routes." (Individual)

16.2.12   A minority of comments offered suggestions or requested improvements to paying with contactless bank cards without stating support or opposition. The main suggestion was to have a nationwide contactless bank card system.

"Credit/debit card swiping on platform entry/exit gates for pre-approved routes." (Individual)

16.2.13   A small minority were in opposition to paying with contactless bank cards.

> *"I use online services but do not … want to use a bank/ credit card to zap a terminal as I go through."* (Individual)

Capping

16.2.14   The vast majority of comments about fare capping were supportive of this measure. Some supportive comments were caveated, with the key points including:

- Access to employment and flexible working arrangements;
- Maximum rail expense within a specified duration of time, such as weekly, monthly or annually (for further discussion see Chapter 18).

> *"I think that some sort of digital, capped, carnet arrangement would be good for people like me who work part-time but do not work the same days each week and do not necessarily have to travel each week."* (Individual)
>
> *"I think we should be able to have a smart card say for an annual ticket and this should be capped at a certain price if during the year we use it more than that then we are not charged any more."* (Individual)

16.2.15   A small minority were in opposition to fare capping.

> *"The Price Cap is wrong in principle because it means all journeys after the cap is reached are free, so there is no incentive to be economical in rail use."* (Individual)

Key points

- There is clear support for e-tickets, mobile phone tickets, smart card tickets, contactless bank cards and fare capping, particularly from commuters, those who use season tickets and who are under the age of 55.

- Key requests for improvements were a nationwide smart ticketing system with improved station infrastructure, consistency across train operating companies and greater functionality of smart tickets with links to online accounts.

17.   ONLINE ACCOUNTS

17.1   Closed Question Results

17.1.1   Respondents to the consultation were asked whether **online accounts used to purchase, monitor, review and change travel arrangements for multiple types of public transport** should be considered[4]. The majority of respondents (88%) thought this suggestion should 'maybe' or 'definitely' be considered, with 64% stating they would definitely consider this suggestion. A full breakdown of responses to this question is provided in Figure 16.

<p style="text-align:center">Figure 16.   To what extent should 'online accounts' be considered? (n=18,982)</p>
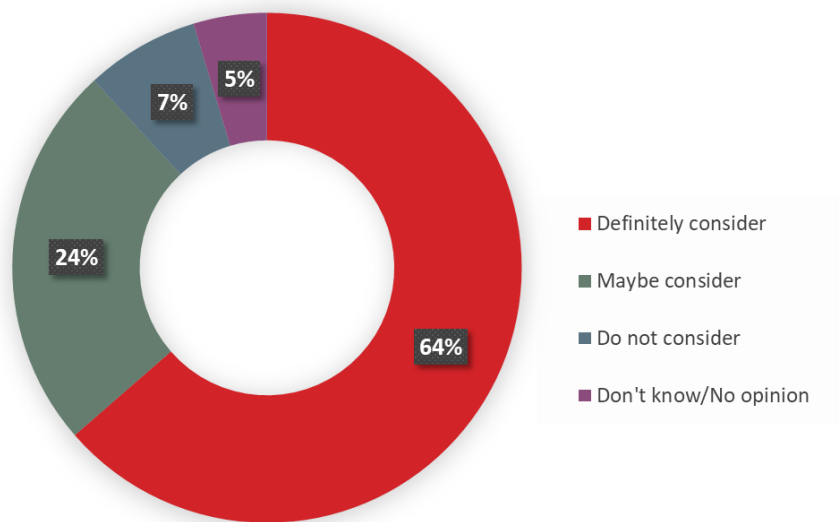
17.1.2   Respondents' views on Online Accounts varied significantly by the following respondent characteristics:

- Frequency of train travel;
- Main reason for train travel;
- Type of rail service(s) used;
- Ticket type(s) purchased;
- Use of smart ticketing;
- Age;
- Gender; and
- Region lived in.

17.1.3   Key points of interest include:

- Respondents who use smart ticketing were more likely to state this suggestion should (maybe or definitely) be considered, than those who do not use smart ticketing (94% compared with 88%, respectively); and

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[4] The exact wording of the question was: 'Online accounts could be available which can be used for rail and other of types of public transport e.g. bus, tram, underground and cycle hire. Account holders would be able to purchase, monitor, review and change travel arrangements online.'

○ Respondents aged 16-64 years were more likely to state this suggestion should (maybe or definitely) be considered (94%) than those aged 65 years and older (88%).

17.2 Findings from the Open-Ended Questions

17.2.1 Of the 19,159 responses received to the consultation, 161 made reference to Online Accounts and 367 responses made reference to Multi-Modal Tickets.

17.2.2 The vast majority of the comments relating to Online Accounts were supportive, with many suggesting that Online Accounts could be linked to a nationwide smartcard system.

> *"I think it would be a good idea to have a National smart card, like a lot of TOCs have, which is linked to an online account. You could have Railcards on it, and you can add a journey, say A to B online, or at the station, and it gives you the best price based on your circumstances."* (Individual)
>
> *"A smart-card system linked to an online account should be used. Passengers can then link the smart-card to their online account and load up tickets."* (Individual)

17.2.3 The vast majority of the comments relating to Multi-Modal Tickets were supportive. Of those who provided supportive comments, a minority suggested that there should be a form of Multi-Modal Ticketing that allows unlimited travel on all forms of public transport.

> *"Smart ticketing, combined ticketing (bus/train/tram) online access to journeys. Proper integrated transport."* (Individual)
>
> *"It would be great if all public transport in this country had an integrated fare system - i.e. tickets can be bought which allow travel on bus and train services in the same journey. It would also be great if a new type of ticket was for sale, a yearly public transport rover, allowing unlimited travel on all bus and train services."* (Individual)

17.2.4 A minority of the comments relating to Multi-Modal Tickets were neither supportive nor opposed, but made the suggestion that transport between different geographical areas should be better integrated.

> *"I want to see more cohesive and organised travel using different means e.g. bus and rail with through tickets … I want to see a more integrated system in place in rural areas where isolation is becoming the norm and people are not able to get out and about, sometimes at all."* (Individual)

Key points

○ There is clear support for online accounts linked to a national smart card system and multi-modal tickets, particularly from smart ticket users and those aged 16-64.

18. NEW FARE STRUCTURES

18.1 Introduction

18.1.1 Of the 19,159 responses received to the consultation 1,152 respondents made an unprompted reference to new fare structures within their responses to the three open questions. This chapter covers these suggested new fare structures, specifically: Part-Time Season Tickets, Pay for What You Use and Itinerary Based Ticketing.

18.2 Part-Time Season Tickets

18.2.1 The majority of comments on new fare structures referenced Part-Time Season Tickets, with all comments showing support for this fare structure, particularly as it is thought to improve access to employment. Other reasons for support, each cited by just a few respondents, included:

- Reductions in overcrowding; and
- A belief that Part-Time Season Tickets would be more environmentally friendly.

"More flexible season tickets to reflect the way people work more flexibly. E.g. I only travel to London 3 days a week but pay for a full 7 day travelcard as it's currently cheaper that way." (Individual)

"I think it's very important that any new ticket model reflects that many working women work part-time and therefore are penalised when purchasing season tickets. I only work 3 days a week but am forced to buy a 'full time' season ticket as there are no other options for me. This means I spend disproportionately more on train fares then I did when I worked full time. How is this fair and how can this be justified by the rail companies?" (Individual)

"One way to increase capacity is to facilitate people who have the flexibility to work from home some of the time. 3/4-day week season tickets would achieve this." (Individual)

"Part time working is a big part of modern day life as is overcrowding on the roads and impact on the environment. Rail travel needs to be affordable and attractive to minimise these impacts. If there was a way to buy a season ticket for part time use that would help many people." (Individual)

18.3 Pay for What You Use

18.3.1 A substantial minority of comments on new fare structures mentioned a Pay for What You Use fare structure, with most showing support for this fare structure, particularly as it was viewed as improving access to employment. Some of those providing supportive comments did so with caveats, i.e. they supported Pay for What You Use, but with:

- The ability to Buy a Pay for What You Use Season Ticket; and
- Updates to ticket barriers.

18.3.2   A few referencing Pay for What You Use explicitly opposed this fare structure, however, no specific reasons were provided for this.

> *"There is no reason why I couldn't have a 'carnet-style' ticket that allows me to travel on a set number of days for the same daily cost as an annual ticket or to be billed per journey at the equivalent rate."* (Individual)
>
> *"Where are the 'carnet' style tickets that would allow me to buy 30 return journeys but without an expiry date (or with a longer expiry, say 3 months) so I can use the individual tickets on those days on which I actually need to travel?"* (Individual)
>
> *"It would make more sense as jobs change to become more flexible to operate a purchase of a group of journeys as opposed to unlimited travel for a period, e.g. 40 journeys which can be used at a customer's discretion as opposed to a monthly ticket."* (Individual)
>
> *"Season tickets could be for a number of journeys rather than a fixed time period."* (Individual)

18.4   Itinerary Based Ticketing

18.4.1   A small minority of comments on new fare structures referenced Itinerary Based Ticketing, all of which showed support.

> *"I make a lot of awkward journeys - e.g. triangular journeys … or, I'll travel to somewhere by train, then travel by car to somewhere else, then take another train journey. These end up disproportionately expensive compared to simple there-and-back-again journeys. So, I think that a return ticket should be made up of the cost of its component parts, not just £2 more than the single. Maybe with a small discount to reflect the additional value, but not much."* (Individual)
>
> *"Facilitation of what airlines call "open jaw" ticketing. If I need to be at a morning meeting in Portsmouth followed by an afternoon meeting in the afternoon, with London being start and end points, I have to buy 3 expensive single tickets. Even if a colleague gives me a lift from Portsmouth to Brighton, it is still a very expensive option."* (Individual)

Key points

○   There is clear support for Part-Time Season tickets and a Pay for What You Use structure, as these mechanisms are considered to improve access to employment.

○   There was some support for Itinerary Based Ticketing.

19.   FARE LEVEL

19.1   Introduction

19.1.1   Of the 19,159 responses received to the consultation, 3,178 respondents made an unprompted reference to fare level within their responses to the three open questions. This chapter covers these fare level comments which can be grouped into two categories: Comments on the current level of fares; and, comments on changes to the level of fares.

19.2   Comments on the Current Level of Fares

19.2.1   A substantial minority of comments on fare levels noted that fare prices are currently too high, especially considering the current levels of service received by rail passengers. Additionally:

- Many comments suggested that the high price of rail fares would discourage rail travel; and
- Some comments noting the high price of fares made reference to particular types of fare and journey, most notably Season Tickets and Long-distance journeys.

"Fares need to decrease, not increase. The very idea that anybody in the rail industry thinks they can justify yet more price hikes when the service being offered has clearly deteriorated, is frankly obscene." (Individual)

"Train fares in Belgium and other countries are so much cheaper with better quality seats and service than here." (Individual)

"Most of us don't have a choice but [to] commute by train, but we get stung with annual costs that are way too high." (Individual)

"It's shocking that some longer rail journeys are more expensive than flying to another country, e.g. £120 Glasgow - London." (Individual)

19.3   Comments on Changes to the Level of Fares

19.3.1   A minority of comments on fare levels recommended that the level of fares should be reduced, the majority of which provided no further comments to substantiate this. However:

- Many comments indicated that a reduction in fare level would encourage use of trains, with many noting the consequential environmental benefits of an increase in rail travel and thus decrease in road traffic;
- Many suggested reductions were required if a passenger is unable to get a seat or if a journey is affected by planned disruptions;
- Many comments suggesting that fares should be reduced referenced particular types of journey or rail user, specifically weekend journeys and commuters; and
- A very small number of comments suggested that reductions in rail fares should be subsidised by increased tax.

> *"With more reasonable fares, I would travel more and would probably end up paying more overall."* (Individual)
>
> *"The environmental impact of train travel should be considered in pricing of tickets to encourage use as a preferred option to other forms of transport."* (Individual)
>
> *"I think a cheaper service should be offered for same day return weekends."* (Individual)
>
> *"If you want to encourage rail usage then prices need to be lower. It is appalling that commuters who have to travel in the rush hour are paying the most but travel in conditions that animals would not be allowed to endure."* (Individual)

19.3.2   A minority of comments on fare levels made suggestions for how fares should be set, noting that fares:

○   Should be especially informed by the fare pricing/running costs of other modes of transport, and, as cited by a few:

- Should be informed by: Level of inflation, with most comments referencing the Consumer Price Index (CPI), TOC finances, with comments referencing both operator costs and operator profit, average income, and the emissions impact resulting from train operation; and
- Should not be informed by: Area/county borders, and the Retail Price Index (RPI).

> *"At present it is cheaper to fly than travel by train on many routes."* (Individual)
>
> *"There needs to be removal of price hikes between borders. For example, Barnsley to Sheffield is in the same county so therefore fairly cheap. Barnsley to Wakefield is about the same distance in miles but nearly double the price, just because it crosses from south to West Yorkshire."* (Individual)

19.3.3   A small minority of fare level comments, noted:

○   Fares should be subsidised, with the majority suggesting that subsidies should come from Government;
○   Fares should be frozen, with some comments referencing a particular type of fare;
○   Other considerations for fare levels, with most asking for transparency in fare level calculations; and
○   Fares should be increased, with others suggesting that the method by which fares are increased should be reviewed.

> *"If the government want us to use public transport then they should be prepared to subsidise it to a similar extent as other European countries do."* (Individual)
>
> *"Until services are improved there should be no increases."* (Individual)

"Train companies need to clearly publicise on their trains how they justify the prices of their tickets - e.g. cleanliness, x amount of journeys a day - because often customers can wonder why they are paying so much for a ticket." (Individual)

Key points

- Respondents clearly indicated that they consider current fare levels to be too high, deterring use of rail services.

- Respondents requested fare levels to be reduced to reflect service levels (e.g. unable to get a seat) and to encourage greater use of rail services.

20.   OTHER FARES TOPICS RAISED

20.1   Introduction

20.1.1   This chapter covers fare topics raised within responses to the three open questions that are outside of the survey questions, including: Comments on Existing Fare Structures, outside of those addressed in the survey; and Other Fare Related Comments.

20.2   Comments on Existing Fare structures

20.2.1   Of the 19,159 responses received to the consultation, 926 respondents made reference to existing fare structures, outside of those addressed in the survey.

20.2.2   A substantial minority of comments received on existing fare structures made reference to Season Tickets, most of which were supportive. Additionally, of those who offered a supportive comment, a few were provided with caveats, i.e. they supported Season Tickets, but with the ability to:

- Buy off-peak only Season Tickets;
- Share a Season Ticket between two people;
- Make the Season Ticket journey via multiple routes;
- Purchase a Season Ticket with railcard discounts; and
- Buy a zone-based Season Ticket.

20.2.3   Additionally, many comments mentioning Season Tickets provided recommendations for improvement, without indication of level of support, including suggestions that Season Tickets should:

- Be easier to buy, renew or replace;
- Have a different format, specifically, they should not be paper tickets, and should not require photocards;
- Include seat reservations;
- Be better advertised and promoted; and
- Hold a reduced penalty fare.

20.2.4   A few comments referencing Season Tickets explicitly opposed this fare structure.

"Season tickets already offer good value for people who do a lot of travelling." (Individual)

"Off peak season tickets would allow people to commute at off peak hours more simply." (Individual)

"Season tickets should also be transferable so that, say, a couple can use the same ticket when travelling separately on the same route." (Individual)

"I think that some form of season ticket that can use a rail card discount could be a good idea." (Individual)

"Season tickets need to come with far more benefits." (Individual)

> *"The season ticketing system needs to be streamlined so that it's easier to buy and renew season tickets."* (Individual)
>
> *"Allowance of spreading annual season ticket across months."* (Individual)
>
> *"It's currently hard to buy any sort of season ticket without visiting the office … why do you need stone age photocards and printed tickets?"* (Individual)
>
> *"Should be a way to book seats if you have a season ticket."* (Individual)

20.2.5   A substantial minority of comments discussed other structures, specifically:

- Ranger/Rover/Unlimited Travel tickets, with the majority of comments indicating support, and a minority suggesting a need for improvements;
- Zonal based fares, with all comments indicating support; and
- Standing only fares, with the vast majority of comments indicating support.

> *"Keep leisure travel passes like rovers and rangers."* (Individual)
>
> *"Maybe consider fare zones around cities/areas/regions."* (Individual)
>
> *"On trains that are well known for being very full, so that standing all the way is a very likely scenario, why not sell a 'Standing Only' ticket."* (Individual)

20.2.6   A minority of comments discussed flat rate fares, with all comments suggesting that there should be a fixed rate for a fixed journey.

> *"Keep the fare structure flat and simple please."* (Individual)
>
> *"Prices should be fixed between destinations."* (Individual)

20.3   Other Fare Related Comments

20.3.1   Of the 19,159 responses received to the consultation 1,454 respondents made reference to other fare related topics, outside of those addressed in the survey. A minority of these comments related to seat reservations:

- Most comments suggested improvements should be made to the seat reservation process, including consideration for when seats can be reserved, with most comments suggesting that a passenger should not be able to reserve seats once a journey has started;
- Some comments referenced the cost of seat reservations, with the majority noting that seat reservations should cost extra;
- Some comments were supportive of seat reservations, including last minute reservations, with many having particular passengers and journeys in mind, i.e. disabled or elderly passengers and long-distance journeys; and

O   Fewer comments were opposed to seat reservations, including last minute reservations, with around half having particular types of fares and journeys in mind, i.e. advanced fares, commuter trains and local services.

> *"Seats should not be reservable once a train has been prepared for departure."* (Individual)
>
> *"The practice of including free seat reservations should end. It leads to large numbers of reserved seats that are not used. A small fee would discourage those with little intent of travelling on a specific train from making reservations."* (Individual)
>
> *"I would like it if seat reservations could be guaranteed. I have disabilities and choose seats to accommodate my needs but several times the train hasn't got seat reservations confirmed and I have to walk around with great difficulty to find a seat."* (Individual)
>
> *"I think that you on long distance journeys you should be able to book a seat which you are guaranteed to get - possibly paying £1 or £2 more for this service. Also all pre-booked seats should be in the same carriages - so that if you've not booked a seat you know which carriage to look in for a spare seat."* (Individual)
>
> *"Advance fares with a significant discount should never have a reserved seat."* (Individual)
>
> *"I'd like to see the end of reserved seating on packed commuter trains."* (Individual)

20.3.2   A minority of other comments on fares related to the provision of first class, specifically:

O   Most comments asked for the removal of first class provision, with the majority suggesting that this would increase capacity of rolling stock;

O   A similar number:

● Asked for a review of pricing of first class fares, with equal numbers suggesting that first class should be more expensive than standard class or not much more expensive than standard class;

● Suggested that first class provision should be retained, with a few suggesting that it should be available across all routes; and

● Requested a review of ticket flexibility, with the suggestion that a passenger should be able to upgrade from standard to first class.

> *"[The] number of first class carriages need to be cut dramatically. I've lost count of the number of times I've been on a train with a massive first class section being completely underused while standard class is rammed to capacity. One first class carriage maximum should do it or maybe even cut completely on commuter services."* (Individual)
>
> *"First Class fares to be a fixed percentage above Second Class. Sometimes, at present, they are over 2.5 times the cost!"* (Individual)
>
> *"First class fares should be significantly higher."* (individual)

> *"Keep first class wherever possible for those that wish to pay more for extra."* (Individual)
>
> *"When first class is nearly empty and second class is rammed, paying a % standard across the board supplement should allow any passenger to upgrade on the train."* (Individual)

20.3.3   Additionally, the flexibility of fares was mentioned in a minority of comments, without reference to a particular fare type, notably:

- Most comments suggested that fares should be changeable without penalty;
- Most comments noted that the validity of fares should be reviewed, with tickets valid for any 'via' route, including the fastest; and
- Some comments remarked on the ability to take a break in a journey, with the vast majority showing support for this.

> *"It should be easy to purchase a ticket and to change when you travel i.e. more flexibility and you should not be penalised when you need to change when you travel."* (Individual)
>
> *"All tickets should be valid by any, reasonable, route."* (Individual)
>
> *"There should be consistent rules about being able to break journeys (Generally, you should be able to do so on all journeys)."* (Individual)

20.3.4   Furthermore, a minority of comments made reference to the promotion of fares, with the majority showing support for promotional discounts and some suggesting that fares need to be better advertised and promoted.

> *"Encourage rail travel by offers."* (Individual)
>
> *"Better publicity for "special offers"."* (Individual)
>
> *"Publicise and promote fares other than at stations, e.g. bus stations, car parks, notice boards in town centres."* (Individual)

20.3.5   A small minority of other fare related comments mentioned fares associated with:

- Additional carry-on items, which can be broadly grouped as:

  - Bicycles (regarding bicycle reservations);
  - Large luggage; and
  - Animals.

- Penalty fares, with most comments stating that they should be reduced or removed;
- Allocated seating, with most comments supportive of an allocated seating system; and

○ The revenue resulting from fares, with most comments asking for a review of the method of revenue reinvestment.

"I ride a bicycle and it is often inconvenient to buy the necessary ticket to travel on a train with a cycle. There should be regulation to make bicycle ticketing as easy as human ticketing." (Individual)

"Travelling with bike or heavy luggage on trains these days is a nightmare." (Individual)

"More luggage areas would be nice." (Individual)

"Remove penalty charges for those who board a train without a ticket because there is a big queue at the ticket machine and the train only goes once an hour." (Individual)

"The situation where occasional users feel threatened by warnings about penalty fares etc should be avoided. The railway seems to threaten its customers with something akin to criminalisation or what may be honest mistakes in a way that other retailing organisations do not." (Individual)

"Tickets should not be sold beyond seating capacity." (Individual)

"I would like to see some "guaranteed seat" trains where no further tickets were sold once the train was full i.e. no standing passengers. You don't get passengers sitting in the corridor on a plane." (Individual)

"In my opinion, all the money raised from tickets should be reinvested in the railways." (Individual)

"There should be more transparency around how the profits of train companies are used." (Individual)

Key points

○ There is clear support for season tickets with improved functionality (e.g. held on a smart card) and flexibility (e.g. available to use via multiple routes).

○ There is indication of support for improvements to the seat reservation process, with some respondents preferring an allocated seating system.

○ There was some mention of carriage types, requesting the removal of First Class or, alternatively, for consistency in ticket price and availability of fare classes across the network.

21. OTHER TICKETING TOPICS RAISED

21.1 Introduction

21.1.1 This chapter covers ticketing topics raised within responses to the three open questions that are outside of the survey questions, including: Paper Tickets; Buying at Ticket machines; Buying Online; Refunds; and Other Ticketing Related Comments.

21.2 Buying Online

21.2.1 Of the 19,159 responses received to the consultation, 2,410 made reference to 'buying online'. The majority of these comments were suggestions for how this purchase channel could be improved. The recommendations made by respondents can be grouped into three categories:

- **Make buying online easier for users**. The main recommendations provided in the comments regarding ease of use were as follows:

  - Many wanted a greater consistency to the purchasing interface, either through the development of a centralised online purchase platform, or by making the websites of all ticket providers more consistent;
  - Many suggested that the cheapest fare needs to be made more obvious and transparent to the purchaser; and
  - Many comments suggested that all ticket types need to be provided.

"Online purchase should be unified (preferably through the national rail site). It is annoying and complicated to purchase a ticket online, and hard to compare." (Individual)

"More clarity with regard to online purchase and ticket validity. I am not convinced it is always clear enough and that the best options are presented." (Individual)

"All types of tickets currently available at stations must also be available online and on mobile, such as Plusbus tickets." (Individual)

- **Improving Ticket Collection.** The main suggestions provided here were:

  - Many recommended reviewing whether paper ticket collection at stations is necessary, or whether it should be possible to print at home, or travel without a physical ticket; and
  - Some suggested making other changes that would improve the experience of collecting tickets at stations.

"Please do away with the system where I can purchase a ticket online but then still have to visit a machine at the station and queue to print off a ticket." (Individual)

"Online ticket is fine and print at home would be a more convenient option than pick up from the station." (Individual)

> *"If you purchase tickets to travel from A - B and you have a 'code' for collection, these should be available to collect from any station and not just from station A."* (Individual)

○ **Other Suggested Improvements.** The most cited 'other' improvement offered in the respondents' comments were:

- Many suggested that third parties' sales should be reviewed, as well as considering the abolition of service fees; and
- Some commented that there should be a review as to whether postal options are necessary (and if so, whether delivery charges should be incurred), or whether it should be possible to travel without a physical ticket.

> *"Ticket Booking Fees and Card Fees should not be allowed to be charged by all online ticket vending sites."* (Individual)
>
> *"All tickets should be issued by national rail, in order to prevent third parties sucking revenue out of the system for the own profits."* (Individual)
>
> *"Fees for collecting online-bought tickets at a station ticket machine should be banned. Only physical postage of tickets should be charged for."* (Individual)

- Less cited, 'other' improvements included improving the process of purchasing optional extras when buying online, as well as making tickets purchased online cheaper than other purchase channels.

> *"It would be good if tickets for all rail journeys could be booked in one place which offers the ability to reserves seats on a carriage diagram."* (Individual)
>
> *"Judging by pricing in other areas, there seems to be cost savings in online purchasing and electronic ticketing. If this is the case, there seems no reason not to reflect this in customer prices."* (Individual)

21.2.2 A substantial minority provided supportive comments relating to booking online, for example suggesting that purchasing tickets online is convenient.

> *"Online is the way forward. Look at every other service industry i.e. Banks."* (Individual)
>
> *"I think online the online purchasing which is currently in place is perfectly adequate."* (Individual)

○ Of those who offered supportive comments regarding 'buying online', many did so with caveats, i.e. they supported buying online, on the basis that:

- Purchasing tickets online is made cheaper than other purchase points or channels;
- Online purchases reduce queuing times for those purchasing at stations; and
- Improvements are made to the ticket purchase and collection processes.

> *"Online purchase and e-ticketing should be encouraged (preferably with a discount)."* (Individual)

> *"More on line purchasing of tickets and electronic ticketing would reduce queues at stations and give passengers more time to catch their trains. To encourage passengers to use this method they could be given a discount for using these methods."* (Individual)

> *"Online purchase is good, but I'd like to save hassle of printed tickets and just use phone/debit card to access barriers at stations."* (Individual)

21.2.3   A minority of responses referencing 'buying online' were in opposition to this method of purchase. Of these comments, some did not like to purchase anything online, whilst others were sceptical of the reliability and safety of online purchases.

> *"I don't trust on-line purchase. I prefer to buy a ticket at a station as I always have done."* (Individual)

> *"Online ticketing would mean allowing greater surveillance and trusting all train companies with data which is simply too dangerous. We do not trust you enough I am afraid."* (Individual)

21.3   Buying at Ticket Machines

21.3.1   Of the 19,159 responses received to the consultation, 1,034 made reference to 'buying at ticket machines'. The majority of these comments were suggestions for how ticket machines could be made easier to use.

⭕   The most frequently requested improvements regarding ease of use were as follows:

- Many felt that all available fares should be provided; and
- Many commented that machines need to show greater transparency of the cheapest available fares and any route/time restrictions to tickets.

> *"Any ticket should be available at any time from ticket machines. It has got better recently but there are still restrictions."* (Individual)

> *"Ticket machines should force you to input your journey first so they can then offer you the cheapest ticket (like the websites) available, rather than allow you to pick any ticket type / human error. Additionally, ticket machines should block you from buying off-peak tickets during peak times and vice versa."* (Individual)

> *"It needs to be clear when, and which route, a given ticket is valid for. Links to national rail given at the moment aren't very clear and don't give a route map. Often the machine doesn't show the rules when buying, just saying "as advertised"."* (Individual)

⭕   Less frequently cited improvements regarding ease of use were:

- Some felt that ticket collection should be simpler;
- Some suggested that more payment methods should be permitted;
- Some felt that ticket machines need to be more accessible for those with disabilities (e.g. size of text, audio description); and
- Some commented that ticket machines should be consistent across operators.

> *"Collecting tickets at the station needs to be made easier. First you have to dig out the card used for payment and then you have to enter a long-ish unique code. It's a complete faff."* (Individual)
>
> *"The new range of ticket machines are great but they tend to take only debit and credit cards which does somewhat discriminate against the poorer people who may not have either of these."* (Individual)
>
> *"I'd love to see ticket machines made fully accessible - there are already talking ATMs, whilst the main touchscreen consumer platforms (iOS, Android and Windows 10) all come equipped with screen reader accessibility as standard."* (Individual)

21.3.2   A substantial minority of comments regarding 'buying at ticket machines' were other suggestions that did not relate to ease of use. Of these comments, the most common was that ticket machines were unreliable. A minority related to making ticket machines more readily available to the public.

> *"It should be much easier to purchase tickets via a greater number of retail outlets; not just travel agents e.g. supermarkets, bureaux de change, post offices etc."* (Individual)
>
> *"Sort out the USELESS ticket machines, my local one is out of service more than it is working."* (Individual)

21.3.3   A substantial minority of comments referencing 'buying at ticket machines' were supportive of this purchase method.

> *"More machines in stations to buy tickets on the day."* (Individual)
>
> *"More machines at stations in addition to still having ticket offices open."* (Individual)

21.3.4   A minority of comments referencing 'buying at ticket machines' were opposing this method of purchase. Of these oppositional comments, many suggested that ticket machines are confusing.

> *"Ticket machines are more complicated than ever. Customers never know if they are getting the best deal."* (Individual)
>
> *"Self-Serve ticket machines are a huge problem for most people: They are confusing to use and when using to identify which ticket you should buy without worrying about being prosecuted for having the wrong one. Please have staffed counters."* (Individual)

21.4 Refunds

21.4.1 Of the 19,159 responses received to the consultation, 668 made reference to 'refunds', with all comments relating to suggested improvements. The recommendations that were made could be grouped into three categories:

○ The majority of comments were requests to change the refund process. The most frequently cited comments were:

- Many suggested that there needs to be consistency across operators with regards to their procedures; and
- Some wanted admin fees to be abolished.

"Compensation for delays or cancellations should also be done via an account through the app. Refunds could either be used to purchase other tickets or traded in at train counters for cash." (Individual)

"It is not simple to get a refund for multi-TOC journeys that fail." (Individual)

"If there are delays to trains - the amount of delay before compensation can be claimed varies with different train operators. This should be standardised across the country." (Individual)

"I had an experience where I purchased my ticket online but my meeting was cancelled. I could not get a refund on line and had to call customer services who could not answer a simple question of "what do you do which incurs me a £10 admin charge"." (Individual)

○ A substantial minority suggested that automatic refunds for delays should be provided, with some specifying that automatic refunds should be available for Season Ticket holders, those using eTickets or buying online, or for advanced fares.

"Automatic refunds for delayed or cancelled trains: if the passenger's journey is adversely affected, they should be compensated automatically." (Individual)

"There should be better systems for delay repay - automatic refund to credit card when purchased on line." (Individual)

"I think season ticket holders should receive automatic refunds when trains are delayed or cancelled on their route." (Individual)

○ A substantial minority referencing refunds suggested that levels of compensation should be increased, i.e. they wanted to see:

- Levels of compensation provided to passengers to be generally increased, or offered for a wider range of inconveniences (e.g. shorter delays); and
- Refunds for overcrowded services, or services where no seats are available.

> *"Constant delays should be penalised more harshly with bigger customer refunds."* (Individual)

> *"The amount of delay experienced before compensation is payable should also be reduced. There should be some compensation for trains running 15 minutes late."* (Individual)

> *"Overcrowded trains should entitle passengers who cannot get a seat to refunds in the same way that belated trains currently do."* (Individual)

21.5 Paper Tickets

21.5.1 Of the 19,159 responses received to the consultation, 514 made reference to 'paper tickets'. A substantial minority of comments provided on 'paper tickets' were supportive, with many of those who offered support suggesting that paper tickets provide an accessible ticketing method to all. Many also made reference to the fact that paper tickets provide a back-up for when technology fails.

> *"I am quite tech-savvy. I carry a smartphone and use a mobile app to check train times etc, but I do insist on having a proper card ticket. Yes, I could lose it, but I could lose my phone too. How do you show a ticket inspector a smartphone ticket if your battery has gone flat."* (Individual)

> *"Electronic ticketing is becoming more popular, and something I try to use when possible. But this shouldn't be at the expense of old fashioned paper ticketing while there is still a requirement amongst some groups of the community."* (Individual)

21.5.2 A minority of comments referencing paper tickets were in opposition to this form of ticketing. Many of these comments made reference to networks that currently implement paperless ticketing systems effectively, whilst some suggested that a paperless system would save money.

> *"With the technology available now, there should not be paper tickets anymore. The London Underground has managed to implement paperless tickets effectively and a similar ticket system should be implemented across the network."* (Individual)

> *"Paper tickets should be phased out. That would save a huge amount of money."* (Individual)

21.5.3 A minority of comments referencing paper tickets provided suggestions for how this form of ticketing could be improved. The most frequently requested improvements were:

- Improving ticket design and sizing, which primarily included comments on the durability, colour, font size, and size of the physical paper ticket; and
- Reducing the number of paper tickets printed per journey.

> *"Tickets other than daily tickets should be printed on a plastic card - my yearly paper ticket lasts about 3-4 months before it needs replacing."* (Individual)

> *"The text printed on tickets is very small, often to the point of illegibility. It's surely not difficult to make it bigger. The passenger needs to know their start and destination, the departure time of their train, and the identity of their carriage and seat reservation."* (Individual)

> *"Why is it necessary to issue a sheaf of tickets for our rail journeys? For a return journey in November 2017 for two people with [name of TOC], we were issued with an astonishing 11 identically coloured vouchers, making it very difficult to identify the correct ticket for inspection, and greatly increasing the risk of losing one or more of the coupons."* (Individual)

21.6   Other comments on ticketing

21.6.1   Of the 19,159 responses received to the consultation, 3,560 provided other comments on ticketing. A substantial minority of these comments related to the provision of different purchase channels:

- Most comments were supportive of multiple purchase channels being available, with many suggesting that this would make buying tickets accessible to all groups in society;
- Some comments requested that the purchase channels available should be consistent across operators; and
- Some wanted changes to where and how train tickets could be purchased, for instance, being able to purchase tickets beyond current rail outlets.

> *"All tickets should be available on all methods of purchase."* (Individual)

> *"There are quite a lot of people who do not have access to a computer or Wi-Fi, and I think more outlets would encourage more people to buy."* (Individual)

> *"Encompass all possible ways of purchasing and recording journeys. This should be standardised across the various TOCs."* (Individual)

> *"Online ticketing is good for computer users but no good for elderly people who have not all got computers. Perhaps tickets could be purchased at the Post Office."* (Individual)

- Most suggested that prices should be the same across all purchase channels, with many commenting that this was required to ensure equality for all members of society, particularly the elderly and those without access to the internet.

> *"No matter where a ticket is purchased, the fare should be the same."* (Individual)

"There shouldn't be any difference in price between online purchases and purchases made at stations - not everyone has access to online or electronic ticketing, or may be of an age where this is too difficult to understand." (Individual)

- By contrast, some suggested that ticket prices should vary depending on the purchase channel used, with many of these comments specifying that this would reflect the reduction in operator costs.

"Electronic ticketing would surely reduce the rail companies' overheads. These savings should be passed on to the customer." (Individual)

"Everything should be done on mobile apps. Have it more expensive to buy tickets in other ways." (Individual)

21.6.2   A minority of other comments suggested improvements to ticketing in general. Of these comments:

- Many were opposed to single operator tickets;
- Many requested changes to when and where tickets should be available for purchase, for instance, allowing tickets to be purchased once on the train; and
- A few made suggestions for how tickets could be replaced by other alternatives (e.g. booking references or biometric scanning).

"Tickets should be usable on any train that travels the route." (Individual)

"I wish you could get on any train going in the direction you want to a place you want to get to without worrying about which company runs the service." (Individual)

"The ability to purchase a ticket from a conductor on the train is essential for those customers who board at small rural stations and who may have limited access or ability to use technology." (Individual)

21.6.3   A minority of other comments related to improving the provision of information regarding different ticket types:

- Many comments stated that terms and conditions of tickets need to be clearer (e.g. route restrictions), of which some requested greater consistency in terms and conditions across operators; and
- Many comments cited the need for improved provision of ticket information at stations, including better staff knowledge on fare types, and leaflets.

"Even when you have the tickets, it is not always clear whether the return ticket is valid for any journey or restricted journey-periods." (Individual)

"Each ticket that is sold should be accompanied by a clear written description of the limitations of that ticket." (Individual)

![SYSTRA]

"When purchasing at a station counter, either in advance or for travel same day, staff need to know about best value ticketing, or how to find out about it." (Individual)

Key points

- ○ Respondents were generally supportive of paper tickets because they offer an accessible ticketing method for all.

- ○ Respondents asked for improvements to tickets machines (e.g. offering all available fares and greater ease of use).

- ○ Respondents showed support for buying tickets online but expressed concerns over user experience. Suggested improvements included greater ease of use (e.g. consistent webpage interface), improved ticket collection, and more online sales regulations (e.g. third-party sales and removal of service fees).

- ○ There were fewer references to refunds but those that did comment asked for improvements through consistency across operators, an automatic refund process, and increased levels of compensation.

- ○ There is support to maintain multiple purchase channels to ensure equality for all rail passengers.

- ○ Respondents requested greater clarity on terms and conditions attached to tickets

22. OTHER ISSUES RAISED

22.1 Introduction

22.1.1 This chapter covers other rail topics raised within the responses to the three open questions, outside of the subject of fares and ticketing. These can be grouped as follows: Comments on Rail as a Mode of Travel; Comments on Privatisation; Comments on the Consultation Process; and the Need for Rail Reform in General.

22.2 Comments on Rail as a Mode of Travel

22.2.1 Of the 19,159 responses received to the consultation, 1,897 respondents commented on rail travel more generally. The majority of these comments related to the quality of service received by passengers, with:

- Many reporting concerns for the capacity of train services, including a few referencing capacity for bicycles;
- Many raising concerns for the quality of rail travel amenities, including rolling stock and stations, particularly station car parks;
- Many indicating concern for the reliability of train services; and
- A few or less showing concerns for:

  - Staff, including the level of and attitudes of TOC staff;
  - The accessibility of rail travel; and
  - The level of investment in the quality of the rail service across the country.

"Trains are not providing adequate service at a basic level of providing a seat. No-one should be expected to travel daily for any length of time and have to stand or sit on the floor. This happens all over the country, obviously the South has some of the biggest problems, but Birmingham, Leeds and Manchester all have peak problems." (Individual)

"Overcrowded trains. People standing in aisles. For whole of journeys from Scotland to London. Paying 140 pounds for this. Then not getting compensation. Seating issue needs to be addressed. Standing in aisles is unsafe and unacceptable." (Individual)

"In terms of the quality of train services, it is important to consider the train stock as well as the regularity and speed. For example, I fill this in whilst on a [TOC name] train with benches instead of seats." (Individual)

"My main problem is that car parking at the station is difficult so it deters me from using the train." (Individual)

"The reliability of train journey's arriving on time is notoriously poor, with services I travel on regularly late, delayed, or cancelled. This poor service, again, makes rail travel a much less attractive option." (Individual)

"My personal opinion is that all stations should have at least one Railway Employee present at all times. All trains should have a Conductor. In both instances this is for the safety of passengers." (Individual)

> *"Remove the unnecessary revenue inspectors and extra staff on the platforms and pass on those cost benefits to customers."* (Individual)
>
> *"Provision on the rail system for people with disabilities is a complete disgrace and needs a lot of attention, quickly."* (Individual)
>
> *"Geographically, there is a huge disparity between customer experiences on the rail network."* (Individual)

22.2.2   Additionally, a minority or less of comments expressed concern for:

- ⭕ Train routes, including timetables and possible connections; and
- ⭕ Fare evasion.

> *"Rail companies should get approval from customers in future when they want to amend the timetable."* (Individual)
>
> *"Whatever happens to fares the reliability of trains and chaos of new timetables stop people even considering rail travel."* (Individual)
>
> *"The amount of fare evasion I see when travelling is huge."* (Individual)

22.2.3   A few comments made reference to rail reform in general without any further detail, or showed a concern for the delivery of such reform.

> *"The whole system of rail travel in the UK needs a serious overhaul."* (Individual)
>
> *"I do understand the challenges of delivering such improvements. It is something that everyone agrees needs to be reformed, but in many ways I don't see a full and meaningful reform while there is still disparity in investment generally in transport throughout the UK."* (Individual)

22.3   Comments on Privatisation

22.3.1   Of the 19,159 responses received to the consultation, 850 respondents commented on the privatisation of rail services. The majority of these comments related to the nationalisation of the railway, with nearly all comments expressing support for this.

> *"All parts of the railways should return to public ownership."* (Individual)
>
> *"Rail needs to be renationalised as a matter of urgency."* (Individual)

22.3.2   Additionally, a majority of these comments made reference to TOCs, with:

- ⭕ Many expressing a negative comment;
- ⭕ Many asking for greater regulation of TOCs;
- ⭕ A few asking for more competition in the rail industry; and
- ⭕ A few showing concerns for the separation of TOCs and Network Rail.

> *"A journey with [TOC Name] is, generally, pleasant & enjoyable, and if it isn't it's usually down to reasons outside their control. A journey with [TOC Name] is a total disgrace. [TOC Name] trains are OLD, NOISY, SLOW & FILTHY DIRTY INSIDE & OUT. When I see business people/tourists/visitors on them I personally feel ashamed of them because I think their [sic] disgusting."* (Individual)
>
> *"Regrettably the only winners in the current fare system are the rail franchise shareholders. Losers are us the consumers."* (Individual)
>
> *"At present there appears to be no oversight of rail companies."* (Individual)
>
> *"The main problem I have is that there's no real competition on fares/train services."* (Individual)
>
> *"Possibly the train operator and track operator for a given area should be the same entity."* (Individual)

22.4   Comments on the Consultation Process

22.4.1   Of the 19,159 responses received to the consultation, 550 respondents commented on the consultation process. The majority of these comments expressed concern for the way in which the consultation was completed, with:

- Just over half querying the question structure or wording;
- Many questioning the motives of the survey; and
- A few or less showing concerns for:

  - The accessibility of the consultation; and
  - The adherence of the consultation with existing regulation.

22.4.2   A minority of comments:

- Supported the consultation;
- Requested that the consultation results/proposals for change should be publicised or consulted on further; and
- Suggested that the consultation be expanded to include engagement with other groups of people, including charities and TOC staff.

> *"The questions and set answers in this questionnaire don't give people an opportunity to respond fully."* (Individual)
>
> *"Address the concerns of passengers please. The train companies do not deserve a consultation that panders to them."* (Individual)
>
> *"Given the current climate surrounding Britain's railways and reflecting my previous answers promoting such reform, I support and applaud the public consultation."* (Individual)

Key points

- Respondents expressed clear concern over quality of service within the rail industry, the key issues raised related to capacity, condition of rolling stock and associated travel facilities, frequency and punctuality of rail services and the level of investment across the rail network.

- There was some support for renationalising the railways, including several negative comments over the performance of individual train companies.

- There were a limited number of comments on the consultation process, primarily referring to unclear wording or structure and doubting the motives of the consultation.
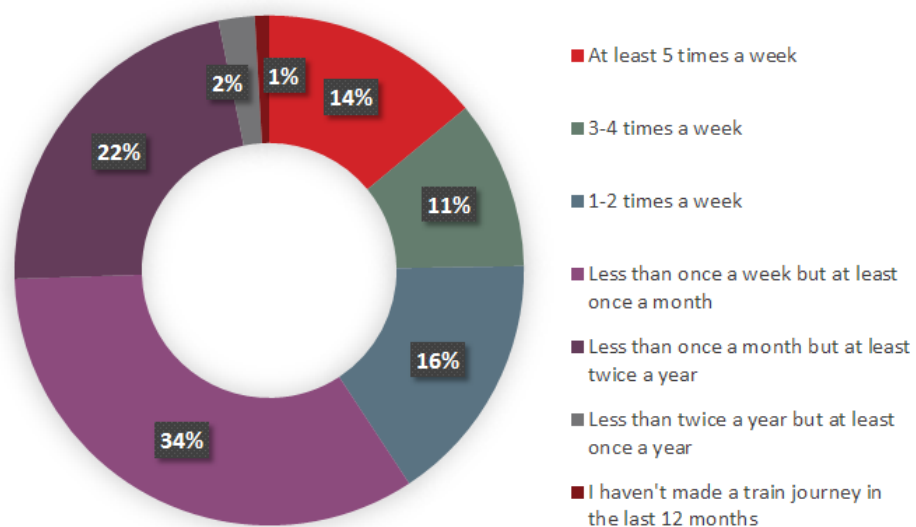
23. RESPONDENT PROFILE

23.1 Introduction

23.1.1 Of the 19,159 responses to the consultation, 19,105 were sent using the consultation questionnaire. Of these, the majority of respondents answered the majority of the closed questions, however some people chose not to answer them all.

23.1.2 Of the 19,089 respondents who stated whether they were responding to the consultation as an individual or on behalf of an organisation, 182 completed the survey on behalf of an organisation (1%), and 18,907 were individuals (99%).
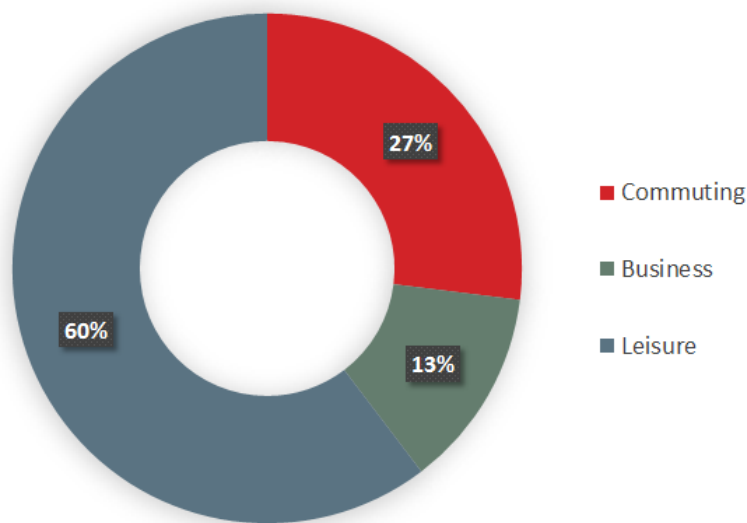
23.2 Individuals

23.2.1 Individual respondents were asked 'on average, how often have you travelled by train in England, Scotland or Wales' in the last 12 months. Over a third of respondents (41%) had travelled at least once a week. A full breakdown of responses to this question is provided in Figure 17.

Figure 17. In the last 12 months, on average, how often have you travelled by train in England, Scotland or Wales? (n=18,907)

- At least 5 times a week
- 3-4 times a week
- 1-2 times a week
- Less than once a week but at least once a month
- Less than once a month but at least twice a year
- Less than twice a year but at least once a year
- I haven't made a train journey in the last 12 months

23.2.2 Individual respondents were asked 'in the last 12 months, what was the main reason for your train travel in England, Scotland or Wales?'. Over half (60%) had travelled for leisure reasons while over a quarter (27%) had travelled for commuting purposes. A full breakdown to this question is provided in Figure 18.

Figure 18.   In the last 12 months, what was the main reason for your travel in England, Scotland or Wales? (n=18,683)

23.2.3   Individual respondents were asked which rail services they had used in the last 12 months. Regional and Intercity services were the most likely, with 86% and 81% of respondents stating they had used these, respectively. A full breakdown of responses to this question is provided in Figure 19.

Figure 19.   Which of the following rail services have you used in the last 12 months? (n=18,561)
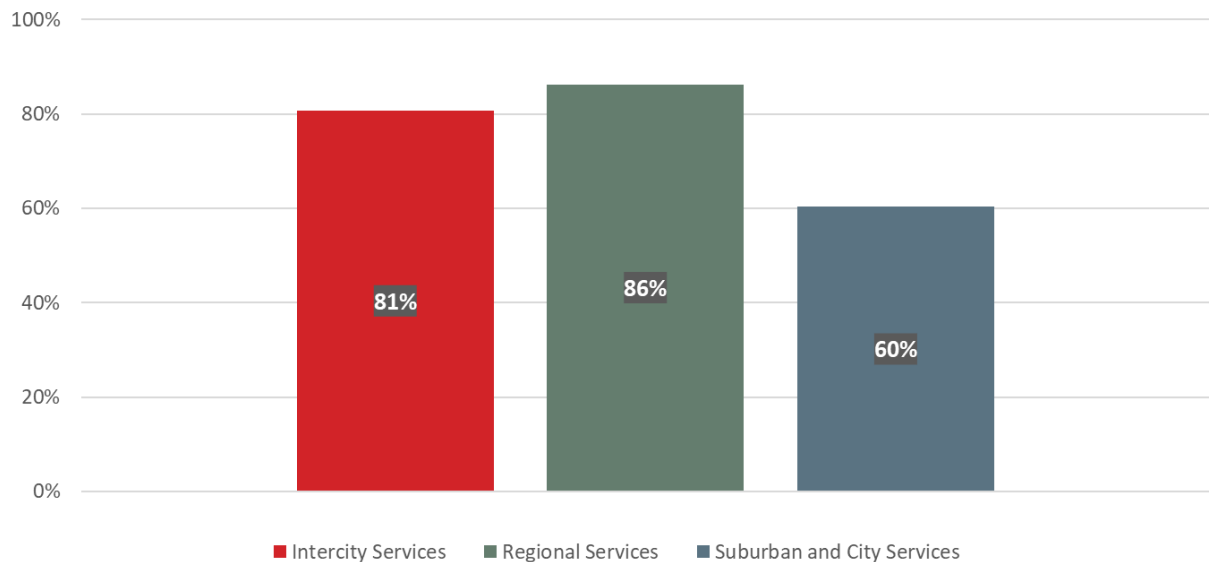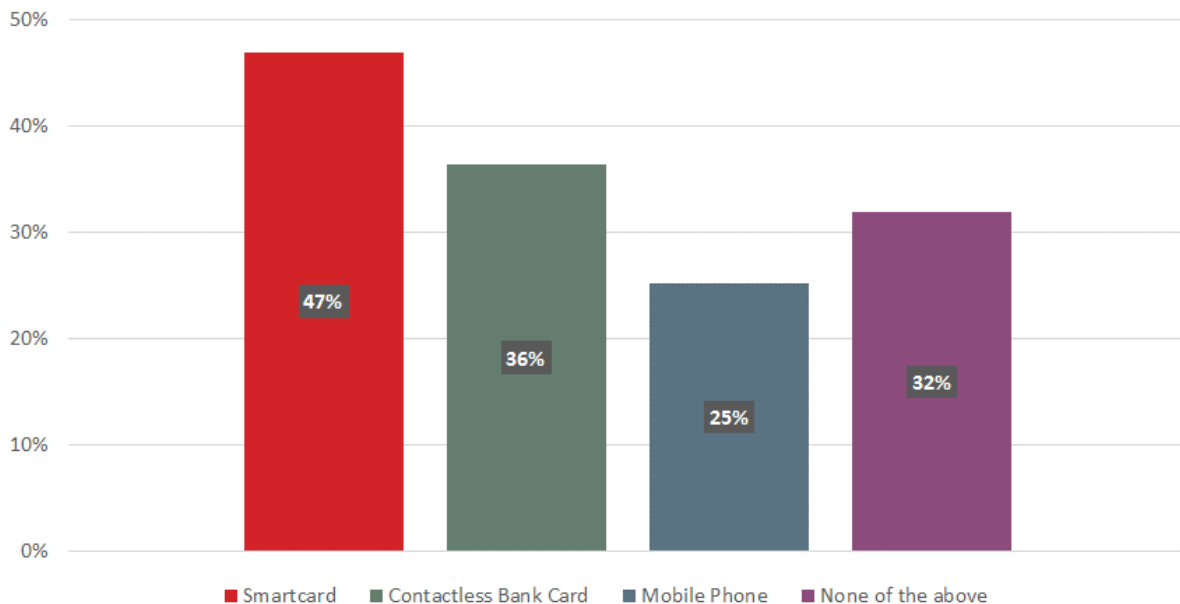

23.2.4   Individual respondents were asked which 'ticket types' they had purchased in the last 12 months. 'Off-peak/Super off-peak tickets, Off-peak Travelcards and Weekenders' were the most common with 82% of respondents stating these. 'Advance tickets' were the next most likely, with 78% stating this. A full breakdown of responses to this question is provided in Figure 20.

Figure 20. **Which of the following ticket types have you purchased in the last 12 months for train journeys in England, Scotland or Wales? (n=18,448)**

Legend:
- Off-peak ticket/ Super off-peak ticket/ Off-peak Travelcard/ Weekender
- Advance ticket
- Anytime ticket/Anytime Day travelcard
- Monthly/Weekly Season Ticket
- Annual Season Ticket
- Don't know

Values: 82%, 78%, 59%, 11%, 8%, 1%
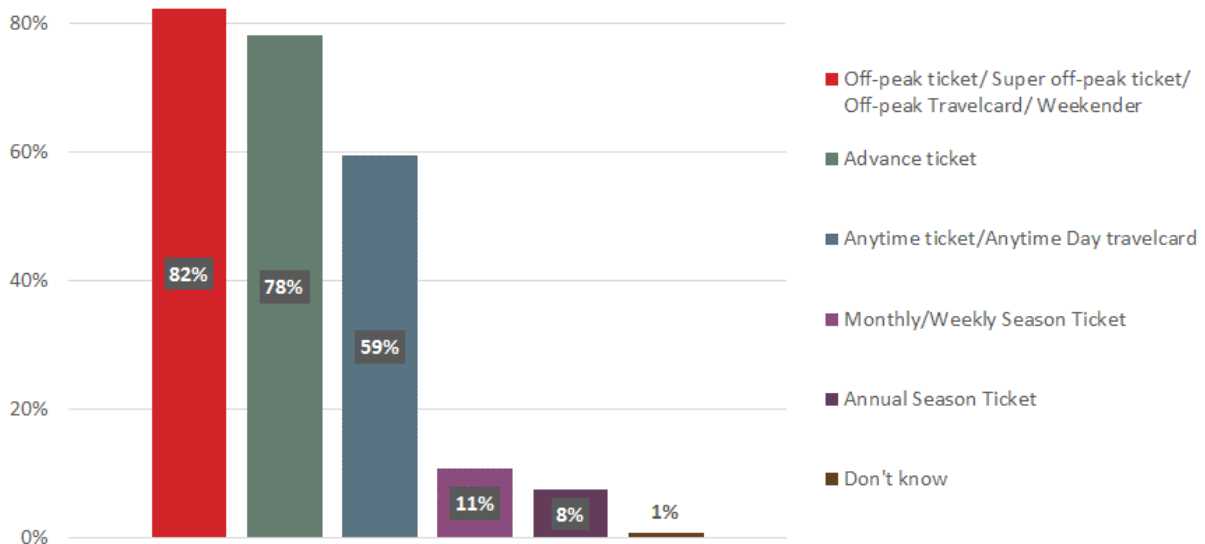
23.2.5   Individual respondents were asked which forms of smart ticket, if any, they had used for their rail travel. Almost half of respondents (47%) had used a smartcard, however almost a third (32%) had used none of the smart tickets listed in the question. A full breakdown of responses to this question is provided in Figure 21.

Figure 21. **Which of the following have you used for rail travel? (n=18,818)**

Legend:
- Smartcard
- Contactless Bank Card
- Mobile Phone
- None of the above

Values: 47%, 36%, 25%, 32%

23.2.6   A full breakdown of respondents' geographic UK residency is provided in Figure 22.

Figure 22.   Region Respondents Live (n=17,747)
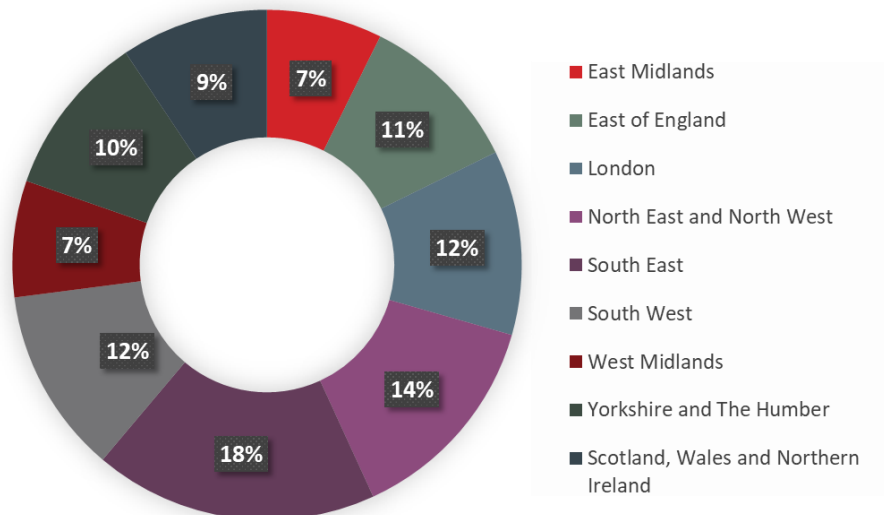
23.2.7   A full breakdown of respondents' age ranges is provided in Figure 23.

Figure 23.   Which of the following age groups are you in? (n=18,479)

23.2.8   Respondents were asked which gender they are. A full breakdown is provided in Figure 24.

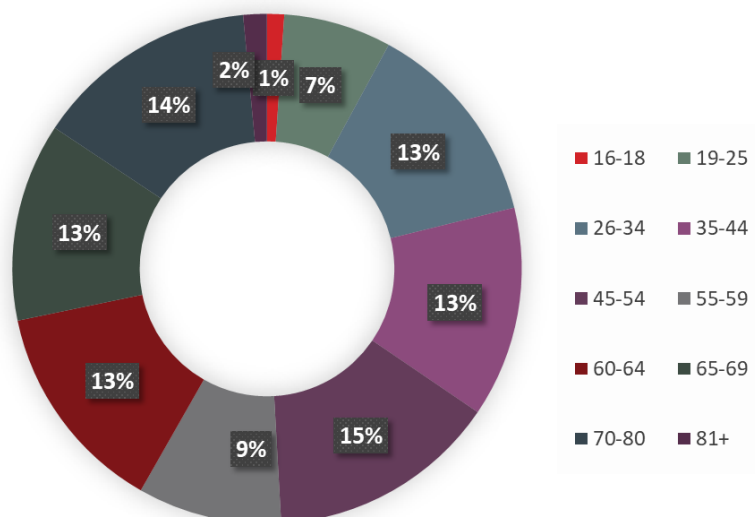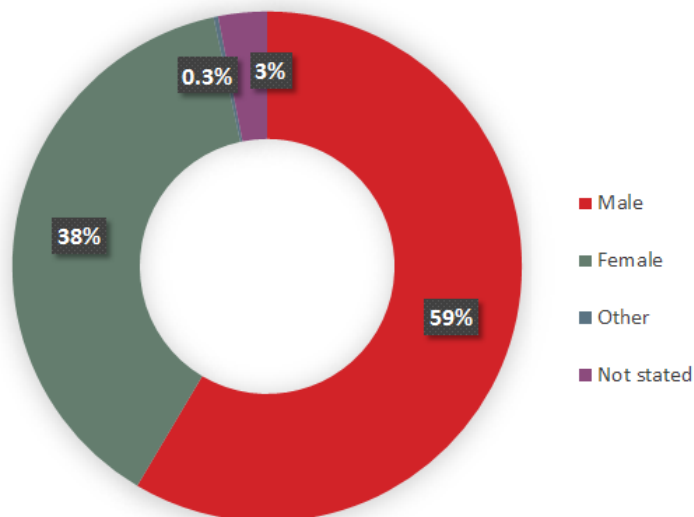**Figure 24.   Gender (n=18,907)**

- Male
- Female
- Other
- Not stated

0.3% 3%
38%
59%

23.3   Organisations

23.3.1   Respondents completing the survey on behalf of an organisation were asked what best describes the category of their organisation. A quarter (25%) described their organisation as a small business while a further 24% described their organisation as an action/interest group. A full breakdown of the responses to this question is provided in Figure 25.

Figure 25.   Which of the following options best describes the category of your organisation? (n=174)

16%
3%
5%
6%
10%
11%
25%
24%

- Small business (up to 49 staff)
- Action / Interest group
- Large business (150+ staff)
- Third sector / voluntary / charity organisation
- Local government
- Medium sized business (50-249 staff)
- Other public sector
- Other
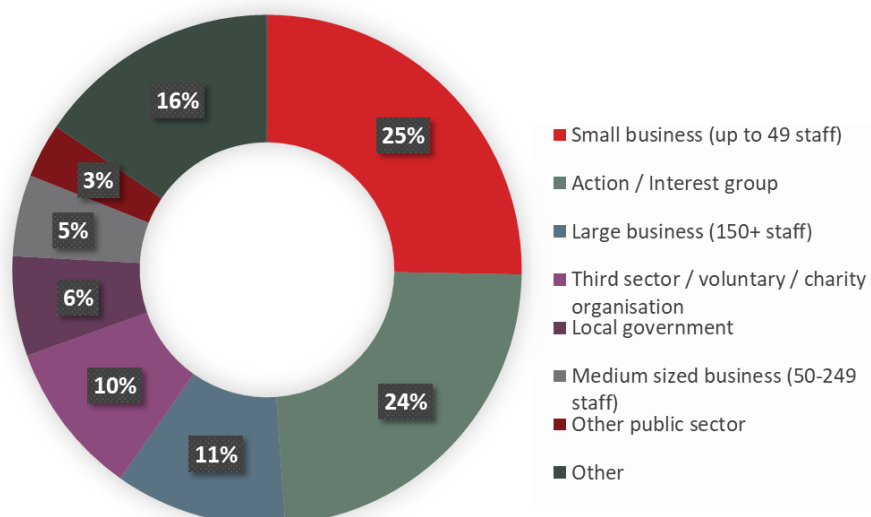
23.3.2   The organisations were asked whether they worked 'within or for the rail industry'. Over a third of respondents (36%) reported that their organisation did work within or for the rail industry. A full breakdown of responses to this question is provided in Figure 26.

Figure 26.   Does your organisation work within or for the rail industry? (n= 176)
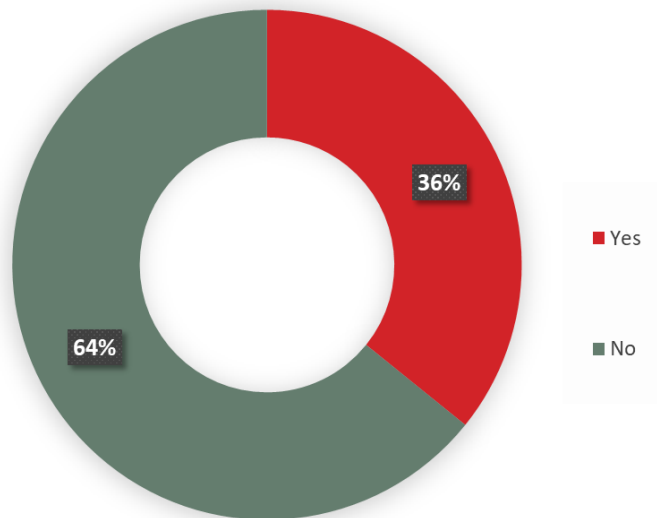
24.   SUMMARY

24.1   Changes to fare structure

24.1.1   There was overwhelming support for reform to rail fares amongst consultation respondents, the vast majority of whom considered reform quite (30%) or very (54%) necessary. Less than one in ten (8%) considered it unnecessary. The most frequent comments made in support of change related to there being too many fare options currently, and the need for consistency and transparency.

24.1.2   Whilst there is clear support for rail fare reform, only a slightly higher proportion of respondents indicated that they would prefer the balance of discounted fares and standard ticket fares to change than remain as they are now. Of those who wanted change, similar proportions favoured lower standard ticket prices and no discounted tickets, as favoured higher standard ticket prices with greater discounts than currently offered.

24.1.3   All but one of a series of 10 suggested future scenarios for changes to fare structures were viewed positively by respondents. For each of these, over two thirds of respondents indicated that they should be 'maybe' or 'definitely' considered.

24.1.4   Four suggestions were perceived as 'definitely' worthy of consideration by around half of respondents. These are provided below in order of most likely to be considered worthy of 'possible' or 'definite' consideration (although fares designed so that it is unnecessary to buy a 'split-ticket' to get the cheapest deal was the most likely to be classified as 'definitely' worthy of consideration).

  - Fares which provide savings for certain groups in society (with leisure travellers showing particular support);
  - Fares where both the outward and return journey fares are based on time of day travelled (with business and leisure travellers showing particular support);
  - Fares based on encouraging travel to fill empty seats (with business and leisure travellers, and those residing in the North East, North West, Scotland, Wales and Northern Ireland, showing particular support); and
  - Fares designed so that it is unnecessary to buy a 'split-ticket' to get the cheapest deal (with commuters, and those residing in London, showing particular support).

24.1.5   A larger number of comments were made relating to 'fares which provide savings for certain groups in society' than other scenarios, and these were primarily expressing support for specific groups. Groups most frequently mentioned were people with disabilities and senior citizens, but a large number of other specific groups were also mentioned.

24.1.6   Five suggestions were perceived as definitely worth considering by just over a third of respondents. These are provided below in order of most likely to be considered worthy of 'possible' or 'definite' consideration.

  - Fares based on distance travelled (with leisure travellers, and those residing in Scotland, Wales and Northern Ireland, showing slightly less support);

- Fares based on the level of service received (with commuters, and those residing in the South East and South West, showing slightly less support);
- Fares based on the amount of flexibility required (with business and leisure travellers, and those residing in the North East and North West, showing particular support);
- Fares based on loyalty to regular travellers (with commuters, and those residing in the South East, showing particular support); and
- Fares based on time of booking (with leisure travellers, and those residing in Scotland, Wales and Northern Ireland, showing particular support).

24.1.7 Considerably more comments were relating to fares based on the amount of flexibility required, relative to other suggestions, with twice as many people expressing support for advance fares (many with caveats or suggestions for improvement) as expressing opposition to them.

24.1.8 The scenario where cost is the same at all times of day and days of the week was considerably less popular than other suggestions. Less than one in five considered this suggestion worthy of 'definite' consideration and just over a third considered it worthy of 'possible' or 'definite' consideration. It was particularly unpopular with leisure travellers and those residing in the West Midlands. There were a particularly large number of comments made relating to this scenario, in particular expressing support for maintaining peak and off-peak fares, with many suggestions relating to revised definitions of peak and off-peak hours, consistency across the network, the need for clearer information, and changes to the difference in cost between different types of fares.

24.1.9 There were a considerable number of comments made by respondents supporting other fare structures. The most common comments expressed support for capped fares, paying for what you use, and part time season tickets, and suggestions for improvements to season tickets. Other suggestions relating to fares receiving the most comments related to seat reservations, first class fares, penalty fares and enforcement.

24.1.10 There were also a considerable number of comments made relating to fare levels, in particular suggesting that they are too high, that they should be reduced or frozen, and that they should be competitive with other modes. This is seen as important for users, the environment and to encourage use. Many consider that current price levels are not reflective of the service levels received.

24.2 Changes to ticketing

24.2.1 Whilst consultation respondents expressed strong support for reform to the ways in which tickets can be purchased, this was not as strong as the support for reform to rail fares. Around two thirds of respondents considered reform to the ways in which tickets can be purchased as quite (30%) or very (36%) necessary. Less than one in five (15%) considered it unnecessary.

24.2.2 All three suggestions made for reform to the ways in which tickets can be purchased were perceived by consultation respondents as 'definitely' worth considering by around two thirds of respondents, and worthy of 'possible' or 'definite' consideration by over three quarters. These are provided below in order of most likely to be considered worthy of consideration.

- Passengers who make the same journey regularly could have a smart/eTicket, pay for each journey and have a price-cap (with commuters, and those residing in London, showing particular support);
- Online accounts could be available which can be used for rail and other types of public transport (with commuters and business travellers, and those residing in London, showing particular support); and
- Tickets should cost the same however you buy them (with no clear difference in views between those travelling for different journey purposes or those residing in different areas).

24.2.3 The most common overarching areas which respondents provided comments on were buying online, followed by e-tickets, buying at stations and buying at ticket machines. The most common themes were:

- Support for multiple purchase channels;
- Support for specific purchase channels/tickets types – most commonly for e-tickets, purchase from ticket offices and station staff, and on-line purchase;
- Need for improvements to all purchase methods in particular relating to on-line purchase and ticket machines;
- Support for consistency in availability of tickets types and fares across all purchase channels (including ticket machines), and within online purchase channels (with support for a centralised nationwide online purchase system);
- Support for consistency in ticket prices from all purchase channels (although there was also some desire for cheaper tickets if bought on-line/e-tickets);
- Desire for greater clarity and transparency in fares from all purchase channels, and in terms and conditions;
- Support for multi-modal tickets; and
- Suggestions relating to refunds.

SYSTRA

Easier Fares Consultation

britainrunsonrail.co.uk/fares

Britain's fares system has failed to keep pace with the rise of modern technology or how people work and travel today, and with part time working and self-employment having increased by over a third in 22 years, the products we can offer don't always match that flexibility. Many passengers also find fares complicated and confusing with the latest study showing that only around a third of rail customers are very confident that they bought the best value ticket for their last journey.

Working together, the rail industry want fares and ticketing regulation, which was originally set out in 1995, updated so we can offer our customers an easier to use range of fares and deliver improvements in ticket buying technology.

This survey, which is part of a joint consultation between the rail industry and passenger watchdog Transport Focus, is not about the industry advocating any specific changes at this stage, it is about getting your views on the type of system and structure you want to see. These will be used to develop proposals to government which, if accepted, we would need to work with them to deliver. The proposals will aim to be revenue neutral, which means that any changes to some fares would need to be balanced elsewhere – this consultation looks at some of the possible trade-offs involved in this.

As part of this consultation we will ask you for personal data including name, email address, partial postcode and optionally ethnicity and any disability that you have. Full details of what personal data we collect, how we process it and how we respect your privacy can be found in our Privacy Policy, available here: www.britainrunsonrail.co.uk/faresprivacypolicy.

The consultation will close on 10th September 2018.

Part 1: Fare Structures

We know that rail fares can sometimes be confusing to customers and we are interested in your views about how rail fares should be structured in the future. To what extent do you think each of the following options should be considered in re-structuring rail fares?

In answering these questions please assume that:

- *The overall average rail fare remains the same as now.*

- *Fares may be structured in a different way (so that some people pay more, some will pay less and others will pay the same as they do now).*

- *The consultation does not advocate any of the options you will be presented, but seeks your views on a range of scenarios. All the options presented are broad concepts which would require further consideration and refinement.*

Fares based on distance travelled (e.g. there is a cost per mile travelled). This may mean that some fares become higher than now and some become lower than now.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares based on the level of service received (e.g. fares for routes with a lower quality service - such as slower, less regular and more basic trains - are lower than fares for routes with a higher quality service). This may mean that some fares become higher than now and some fares become lower than now.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares where the cost is the same at all times of day and for all days of the week (e.g. fares are the same at busy (peak) and less busy (off-peak) times). This may mean that fares at off-peak times become higher than now and fares at peak times become lower than now. As a result trains during peak times may be busier than now.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

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Fares based on time of booking (e.g. fares booked in advance of the day of travel are lower than fares available on the day of travel). This may mean that fares for customers booking on the day of travel become slightly higher than now.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares based on the amount of flexibility required (e.g. fares for booking travel on a specific train service are lower). This may mean that customers wanting complete flexibility over when they travel pay slightly more than now.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares designed so that it is unnecessary to buy a 'split-ticket' in order to get the cheapest deal. At present, there are occasions when it is cheaper, when making a journey from A to C, to buy two or more separate tickets e.g. two tickets (A-B and B-C) may be cheaper than one ticket (A-C). If this were changed those who currently buy split tickets may pay a little more whereas those who currently buy through tickets may pay a little less.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares based on encouraging travel to fill up empty seats (e.g. more last minute deals to fill available seats). Even if this means different passengers paying different fares for the same journey.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

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Fares based on loyalty to regular travellers (e.g. regular travellers can earn discounts for future purchases). Even if that means higher fares for individual journeys using single and return tickets.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares which provide savings for certain groups in society (e.g. lower fares for certain groups in society such as young people, older people, people with disabilities). Even if this means slightly higher fares for other passengers.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Fares where both the outward and return journey fares are based on time of day travelled (e.g. return tickets replaced with easily combined one-way tickets, purchased together, enabling both outward and return journey fares to reflect time of travel, e.g. peak ticket for outward journey, off-peak ticket for return part of the journey).

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

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Reforming rail fares will involve balancing the needs of different customers and it is unlikely that a single approach will suit everyone. Which of the three options described below best reflects your preference for the range of rail fares available?

Option A
No discounted tickets, standard ticket price lower than now

- The cost of a single fare between any two stations will always cost the same amount.
- There will be no difference in price between travelling at busy times (peak) and less busy times (off-peak).

This may mean:
- There will be lower fares than now on busy services.
- There will be higher fares than now on less busy services.
- Trains are likely to be busier than now in the peak period.

Option B
Discounted fares same as now, standard ticket price same as now

- On some routes, the cost of a single fare between any two stations will vary, in the same way as now.
- There will be cheaper tickets available at less busy times (off-peak) on routes where this is currently offered.
- There will be discounts for booking a ticket for specific trains in advance on routes where this is currently offered.

This may mean:
- Fares will be similar to now on busy services.
- Fares will be similar to now on less busy services.
- Trains are likely to carry the same number of passengers as now.

Option C
Greater discounts than now, standard ticket price higher than now

- On some routes, the cost of a single fare between any two stations will vary, in the same way as now.
- The difference in the cost of a single fare between any two stations at busy times (peak) and less busy times (off-peak) will be greater than it is now.
- Discounts for booking specific trains in advance will be greater than now but fully flexible fares will cost more.

This may mean:
- There will be higher fares than now on busy services.
- There will be lower fares than now on less busy services.
- Trains are likely to be less busy than now in the peak period.

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Please select the option that best reflects your preference for the range of rail fares available.

☐ Option A

☐ Option B

☐ Option C

☐ Don't know/No opinion

On a scale of 1 to 5, where 1 is very necessary and 5 is not necessary at all, to what extent do you consider it necessary to reform the way rail fares are currently structured?

☐ 1 - Very necessary

☐ 2 - Quite necessary

☐ 3 - Neither necessary nor unnecessary

☐ 4 - Not very necessary

☐ 5 - Not at all necessary

☐ Don't know/No opinion

Part 2: Buying a ticket

We are interested in your views about how passengers should be able to look for, buy and receive rail tickets. To what extent do you think each of the following options should be considered?

In answering these questions please assume that:

- *The range of rail fares is easier to use than it is at the moment and that the average rail fare remains the same.*

- *Some people pay more whilst some pay less.*

- *The options presented are broad concepts which would require further consideration and refinement.*

Should a ticket cost the same however you buy it? Passengers using e-tickets (for example tickets on mobile phones, smart travel cards and on contactless bank cards) pay the same as those purchasing tickets at stations.

☐ Definitely consider

☐ Maybe consider

☐ Do not consider

☐ Don't know/No opinion

Passengers who make the same journey on a regular basis could have a smart or electronic ticket and pay for each journey that they make. Once the total cost of all journeys reaches a maximum amount they won't have to pay any more for the rest of the week, month or year. This is called a 'price cap'. The benefit of a 'price cap' is that passengers automatically get the best value fare for each individual journey, and only pay for the travel that they use.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

Online accounts could be available which can be used for rail and other of types of public transport e.g. bus, tram, underground and cycle hire. Account holders would be able to purchase, monitor, review and change travel arrangements online.

- ☐ Definitely consider
- ☐ Maybe consider
- ☐ Do not consider
- ☐ Don't know/No opinion

On a scale of 1 to 5, where 1 is very necessary and 5 is not necessary at all, to what extent do you consider it necessary to reform the ways in which tickets can be purchased?

- ☐ Very necessary
- ☐ Quite necessary
- ☐ Neither necessary nor unnecessary
- ☐ Not very necessary
- ☐ Not at all necessary
- ☐ Don't know/No opinion

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Part 3: Any other thoughts

We would like you to have the opportunity to make any other comments about the issues you have considered in the previous questions or anything else you would like to say about fare structure reform. Please use the appropriate boxes provided below.

Comments on the factors which you think should influence <u>rail fare structures</u> e.g. peak/off-peak fares; advance fares, or anything else.

Comments on the factors which you think should influence <u>how tickets are purchased</u> e.g. online purchase, electronic ticketing, or anything else.

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Any other comments.

About you

We would like to know a little more about you to help us understand how people's views differ. Please help us by answering the following questions.

Are you responding to this consultation as an individual or on behalf of an organisation? (Please select one)

☐ As an individual (Please continue)

☐ On behalf of an organisation (Please skip to page 13)

We would like to know about your rail journeys and the kinds of tickets you have used. This information will be used to help us understand the difference in opinions between different types of rail users.

In the last 12 months, on average, how often have you travelled by train in England, Scotland or Wales? (Please select one)

☐ At least 5 times a week

☐ 3-4 times a week

☐ 1-2 times a week

☐ Less than once a week but at least once a month

☐ Less than once a month, but at least twice a year

☐ Less than twice a year, but at least once a year

☐ I haven't made a train journey in the last 12 months

In the last 12 months, what was the main reason for your train travel in England, Scotland or Wales? (Please select main reason only)

☐ Commuting journeys (journeys to/from work or education)

☐ Business journeys (journeys made for business on behalf of your employer)

☐ Leisure journeys

☐ I haven't made a train journey in the last 12 months

Which of the following rail services have you used in the last 12 months? (Please select all that apply)

☐ Intercity services – faster services covering longer distances

☐ Regional services – local or stopping trains between towns and cities

☐ Suburban and city services

☐ Don't know

☐ I haven't made a train journey in the last 12 months

Which of the following ticket types have you purchased in the last 12 months for train journeys in England, Scotland or Wales? (Please select all that apply)

☐ Annual season ticket

☐ Monthly / Weekly season tickets

☐ Anytime ticket / Anytime Day Travelcard (valid for travel at any time on any day)

☐ Off-Peak ticket / Super Off-Peak ticket / Off-Peak Travelcard / Weekender

☐ Advance ticket (valid for travel on one specific timed train only)

☐ Don't know

☐ I haven't made a train journey in the last 12 months

☐ Other (please specify)

Which of the following have you used for rail travel? (Please select all that apply)

☐ Smartcard (e.g. Oyster in London)

☐ Contactless bank card (to travel – rather than to purchase paper ticket)

☐ Mobile phone (with ticket loaded onto the phone)

☐ None of the above

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Please provide the following information. Your name and email address are important to help ensure that all responses to the consultation are unique. They will not be used for any other purpose. The first part of your postcode will help us understand the differences in opinions between people living in different regions.

Your full name

Email address

(UK residents only) **The first part of your postcode e.g. D12, SW19**

We would like to know a bit about you so that we can analyse the findings by passenger types and ensure that any changes to rail fare structures or ticketing do not disadvantage any groups in society.

Which of the following age groups are you in? (Please select one)

☐ 16-18
☐ 19-25
☐ 26-34
☐ 35-44
☐ 45-54
☐ 55-59
☐ 60-64
☐ 65-69
☐ 70-80
☐ 81+
☐ Prefer not to say

Are you: (please select one)

☐ Male
☐ Female
☐ Other
☐ Prefer not to say

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To which of the following groups do you belong? (Please select one)

- [ ] Mixed/multiple ethnic groups
- [ ] White
- [ ] Asian or Asian British
- [ ] Black, African/Caribbean or Black British
- [ ] Chinese
- [ ] Arab
- [ ] Don't know
- [ ] Prefer not to say
- [ ] Other (please specify):

Are you affected by any physical or mental health conditions or illnesses lasting or expected to last 12 months or more? (Please select all that apply)

- [ ] No: None
- [ ] Yes: Sensory (e.g. vision, hearing)
- [ ] Yes: Cognitive (e.g. learning, social, behaviour, memory)
- [ ] Yes: Mental Health
- [ ] Yes: Physical (e.g. mobility, stamina, breathing, fatigue, dexterity)
- [ ] Don't know
- [ ] Prefer not to say
- [ ] Other (please specify):

Please skip to page 14 for details of how to return your completed response form.

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About your organisation

We would like to know a bit about the organisation which you are representing. This information will be used to help us understand any differences in opinions between different types of organisations.

Which of the following options best describes the category of your organisation?
(Please select the most applicable option)

- ☐ Small business (up to 49 staff)
- ☐ Medium sized business (50-249 staff)
- ☐ Large business (150+ staff)
- ☐ Local government
- ☐ Central government
- ☐ Other public sector
- ☐ Third sector / voluntary / charity organisation
- ☐ Action / Interest group
- ☐ Elected representative (MP, councillor, MEP)
- ☐ Academia
- ☐ Other (please specify):

Does your organisation work within or for the rail industry?

- ☐ Yes
- ☐ No

Please provide the following information. Your name and email address are important to help ensure that all responses to the consultation are unique. They will not be used for any other purpose. The first part of your organisation's postcode will help us understand the differences in opinions between organisations based in different regions.

Your full name

Email address

The name of your organisation

(UK based organisations only) **The first part of your organisation's postcode e.g. D12, SW19**

If you are willing to be contacted to be invited to a workshop to discuss these issues further, please enter your preferred email address below.

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Thank you

Thank you for responding to the consultation.

An easier-to-use range of fares is key to delivering the industry's long-term plan, specifically our commitment to increase customer satisfaction.

Please post your completed response form back to the Freepost Address:

'Freepost EASIER FARES'

easierfares@britainrunsonrail.co.uk

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Northern Europe:
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Southern Europe & Mediterranean: Algiers, Baku, Bucharest,
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