



APPENDIX A

Research report

**Understanding drivers of
passenger satisfaction
with value for money**



Passenger Focus

**Understanding Drivers of
Passenger Satisfaction
with Value for Money**

Market Research Report

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1. Background

Passenger Focus is the statutory watchdog for rail passengers. Its vision is to ensure that the rail industry and government are always putting passengers first, achieved by getting the best deal for rail passengers.

In 2008, Ruth Kelly the Secretary of State for Transport, expressed concern regarding the continuing low levels of satisfaction with the value for money of rail travel, as shown by NPS data over the past few years. Whereas perceptions of punctuality and reliability have improved, those for value for money have shown no significant movement upwards. Passenger Focus was asked to review this and make recommendations as to how value for money perceptions could be improved.

The first part of this work involved an extensive analysis of existing data and evidence. Upon completion of this project some gaps in knowledge were identified, and as a result a subsequent research project was commissioned to help fill these gaps. This project will enable the industry to both understand what the issues are and to help assess what initiatives might be developed to improve the current situation.

2. Research Objectives

Passenger Focus wished to understand the drivers of satisfaction and drivers of dissatisfaction with value for money among existing rail passengers – and gain insight into what the rail industry could do to improve satisfaction in this area.

The overall objectives of this research were as follows:

- To understand the drivers of passenger satisfaction and dissatisfaction with value for money for the price of your ticket
- To gain insight into what the rail industry could do to improve passenger satisfaction with value for money
- To quantify the relative importance of different drivers of satisfaction and dissatisfaction with value for money
- To quantify the relative priority of various interventions the rail industry could make to improve satisfaction with value for money

A number of previous projects have been undertaken to assess the relative importance of a range of factors in determining overall trip satisfaction. An initial project was undertaken for the Strategic Rail Authority and this was updated in 2007 by Passenger Focus. The process for both these projects involved a mixture of qualitative research to uncover the range of influences followed by a quantitative, stated preference, approach to rank the factors in order of importance. Given the success of these previous approaches, a similar methodology was adopted for the current project. In particular on-going Passenger Priority surveys that Continental carries out for Passenger Focus use the stated preference approach to add further learning on how customer satisfaction issues can be improved.

3. Methodology and Sample Structure

A combined qualitative and quantitative methodology was adopted.

3.1. Qualitative stage

An initial qualitative stage was conducted to uncover the potential range of issues affecting a passenger's perception of the value for money for the price of their tickets. The qualitative methodology comprised a combination of group discussions and depth interviews. Group discussions were conducted with the majority of the sample as they provide a lively forum for debate and discussion and as such are ideal for generating the key issues and themes surrounding value for money perceptions. Depth interviews were conducted amongst impaired passengers, as this part of the sample was diverse in terms of the nature of their impairment, their travel behaviour and their location, thus lacking the cohesiveness required for a group discussion.

The qualitative sample structure was as follows:

Depth Interviews

Category	Number of Interviews
Visually impaired	2
Mobility impaired (including one wheelchair user)	2
Hearing impaired	2
Total	6 interviews

The depth interviews were spread across London, Birmingham and Manchester. Each interview lasted for one hour, and respondents were incentivised with £30 each.

Group Discussions

Location	Group Profile	
London 13 th October	<p><i>Group 1</i></p> <p>Commute via London stations from London Travelcard zones</p> <p>Season Ticket Holders</p> <p>Males and Females, 25-55, BC1C2</p>	<p><i>Group 2</i></p> <p>Leisure travellers (100 miles +) via London stations (frequent / infrequent)</p> <p>Walk up / advance purchase</p> <p>Students & young people aged 18-25</p> <p>Males and Females</p>
London 14 th October	<p><i>Group 3</i></p> <p>Peak-time commuters via London stations</p> <p>Non-season ticket holders</p> <p>Males and Females, 25-55, BC1C2</p>	<p><i>Group 4</i></p> <p>Leisure travellers (100 miles +) via London stations (frequent / infrequent)</p> <p>Walk up / advance purchase</p> <p>35 – 65 years</p> <p>Males and Females, BC1C2</p>
London 21 st October	<p><i>Group 5</i></p> <p>Commute via London stations from outer suburban areas</p> <p>Season Ticket Holders</p> <p>Males and Females, 25-55, BC1C2</p>	
Midlands 20 th October	<p><i>Group 6</i></p> <p>Commute via Birmingham New Street from range of locations</p> <p>Season Ticket Holders</p> <p>Males and Females, 25-55, BC1C2</p>	<p><i>Group 7</i></p> <p>Birmingham New Street leisure travellers (100 miles +)</p> <p>Walk Up and Advance Purchase</p> <p>Males and Females, 25-55, BC1C2</p>
Leeds 20 th October	<p><i>Group 8</i></p> <p>Peak-time commuters via Leeds</p> <p>Non-season ticket holders</p> <p>Males and Females, 25-55, BC1C2</p>	<p><i>Group 9</i></p> <p>Leeds business travellers</p> <p>Walk Up and Advance Purchase</p> <p>Males and Females, 25-55, BC1C2</p>
Manchester 21 st October	<p><i>Group 10</i></p> <p>Commute via Manchester</p> <p>Season Ticket Holders</p> <p>Males and Females, 25-55, BC1C2</p>	
Cardiff 15 th October	<p><i>Group 11</i></p> <p>Commute via Cardiff from range of locations</p> <p>Season Ticket / Non Season Ticket Holders</p> <p>Males and Females, 25-55, BC1C2</p>	<p><i>Group 12</i></p> <p>Off peak travellers via Cardiff</p> <p>Mix of journey purpose</p> <p>Non-season ticket holders</p> <p>Males and Females, 25-55, BC1C2</p>

Each group discussion lasted for 2 hours and respondents were incentivised with £40 or £50 (depending upon location).

3.2. Quantitative stage

Upon completion of the qualitative stage, the findings were used to inform the development of a subsequent quantitative stage to provide statistical measures of the issues that emerged and further validate the key drivers of value for money. In total 2,493 commuters and 1,271 long distance passengers (i.e. those making a journey of 100 miles or more) were interviewed.

All were handed questionnaires at mainline stations throughout England to self complete and return to Continental by post. Postage paid envelopes were supplied to facilitate their return. Before being given a questionnaire the interviewer checked that passengers met the commuter or long distance sample quota requirement. All interviews were carried out between 11th and 23rd November 2008. The interviewing shifts were spread throughout the day from 7am to 10pm, and covered weekdays and weekends, to ensure a wide cross section of passengers was interviewed.

The number of interviews achieved from the different stations where passengers were handed a questionnaire and the train company each was using are shown in Tables 1 and 2 as follows:

Table 1: Station passenger handed questionnaire

	Commuters	Long Distance
Waterloo	277	4
Marylebone	269	11
Paddington	245	215
Bristol Temple Meads	235	190
Liverpool Street	215	2
London Bridge	213	5
Nottingham	192	14
Leeds	191	157
Liverpool Moorfields	165	2
Kings Cross	144	305
Manchester Piccadilly	143	24
Newcastle	113	53
Birmingham New Street	70	132
Euston	21	157

Table 2: Train company travelling with

	Commuters	Long Distance
First Great Western	410	340
South West Trains	280	-
Chiltern Railways	268	-
Northern rail	242	24
NX East Anglia	212	-
Southern	169	-
Merseyside	165	-
East Midlands	155	-
CrossCountry	150	171
NX East Coast	127	402
First Capital	89	-
TransPennine	81	-
Virgin Trains	38	206
Other	107	128

Table 1 and 2 footnote

For those passengers using more than one train company for their journey they recorded either the train company most recently used or the one they were about to use. For this reason it is possible for there to be some inconsistencies between the station handed the questionnaire (table1) and the train company used (table 2).

3.2.1. Demographic profile of passengers

For both the commuter and long distance samples approximately half were women and half men. A wide range of age groups were included in both samples, commuters were, however, more clustered around the 35 to 54 year age range (55% of commuters were in this age group). Long distance travellers were slightly older than commuters, 35% were over 55 years compared to 17% of commuters. Both samples had a significant white collar profile, 72% of commuters and 64% of long distance passengers which was similar to the profile obtained on the regular NPS survey carried out by Passenger Focus.

93% of commuters and 96% of long distance passengers were of white ethnic background. 5% of commuters and 8% of long distance passengers had a disability or long term illness.

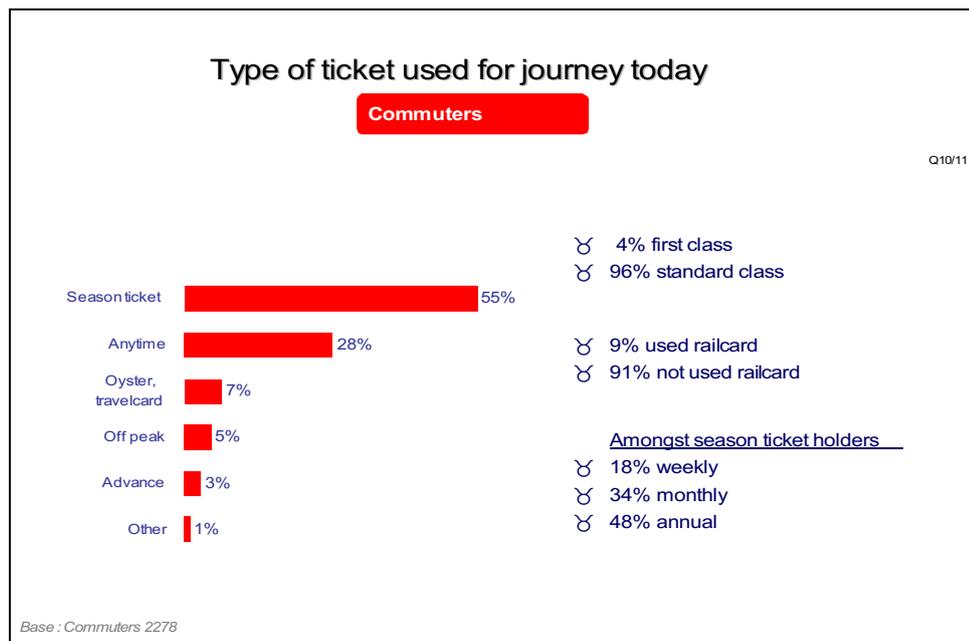
3.3. Journey details of passengers

The type of journey passengers make and the type of ticket they purchase impact on perceptions of value for money (VFM). In particular the type of ticket had a significant

impact on VFM perceptions. The tickets used by those interviewed were as follows and the views of each are explored in more detail throughout this report.

Just over half (55%) of commuters used either a weekly, monthly or annual season ticket.

Table 3

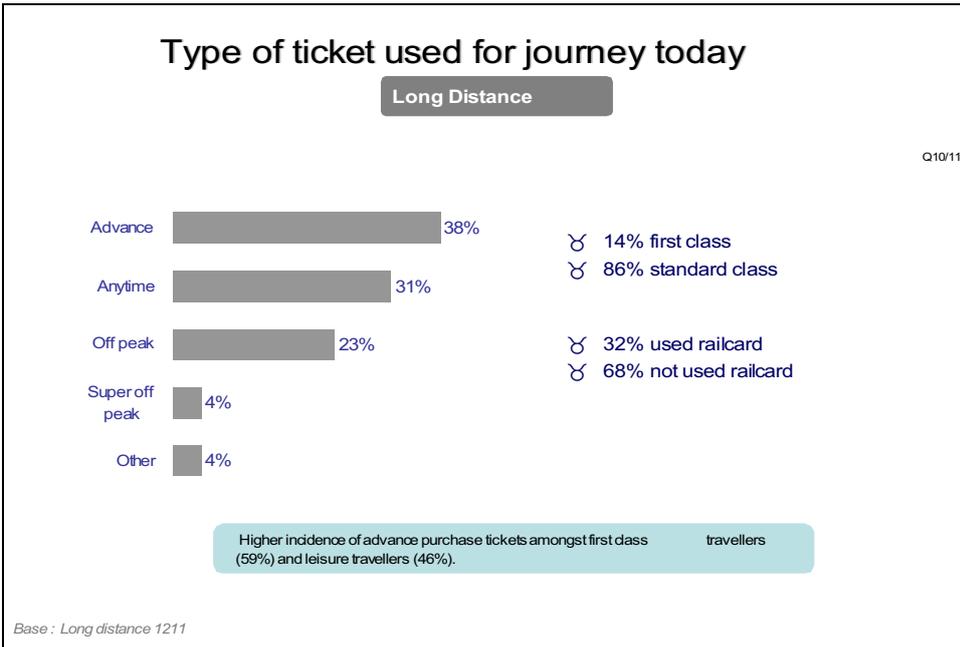


Amongst commuters 75% were commuting daily for work purposes and a further 19% were commuting less regularly for work or business purposes. The remaining 5% were commuting for education reasons. Nearly four in ten (39%) had been doing the same journey for five or more years.

For commuters their scheduled journey times were relatively short, 41% had commutes of up to half an hour. Therefore, any delays of 5 minutes or more represent a significant proportion of the journey time.

The most popular type of ticket for long distance passengers was an advance purchase ticket, especially so with first class travellers (59%) and leisure travellers (46%).

Table 4



Four in ten long distance passengers were on company visits, the remaining 60% were travelling for leisure reasons of which visiting friends and relatives (31%) was the most likely reason. Long distance business travellers were more likely to use an anytime ticket (48%). The respective figure for leisure travellers was much lower (19%).

4. Management Summary

- Both stages of the research found that value for money (VFM) is fundamentally linked to price:
 - advance ticket purchasers were the most satisfied with VFM
 - amongst those dissatisfied with VFM, the main spontaneous mention was the high price of their ticket

- Two key factors directly impact on VFM perceptions:
 - Punctuality and reliability. The more a passenger believes their trains are delayed (especially amongst commuters), the greater the likelihood that they were dissatisfied with VFM
 - Overcrowding and not having a seat. VFM drops considerably if passengers were unable to get a seat
 - These are both considered hygiene factors of rail travel, and if rail companies fail to deliver on these aspects then value for money is seriously questioned.

- The stated preference analysis carried out at the quantitative stage further confirmed the high importance attached to punctuality and seating issues.

- Those making trips more frequently (i.e. daily commuters and those making long distance trips once every 3 months or more often) gave a lower VFM satisfaction rating. Possible reasons might be:
 - greater exposure to journey problems
 - greater experience of price rises
 - Weary from travel (especially commuters) although this is a factor outside of a train operator's control (39% of commuters had been doing the same journey for over 5 years).

- Also of high importance was the role of rail staff, especially in that they:
 - keep passengers clearly informed of delays
 - come up with solutions and take charge (that they. do their job, or even better do roles over and above their job)
 - have a polite and helpful attitude

- are on hand to help
- Helpful and knowledgeable staff who can give out constructive and useful information to passengers would help raise considerably perceptions of the rail service and VFM.
- Clean trains and working toilets were also important factors that contribute to VFM. These were especially important to First Class travellers.
- Many commuters were in the 35 to 54 year age range (55%) and likely to have young families. Communications to these groups should consider their family life stage status and the needs of this group.
- Around two thirds of passengers accepted that rail provided better VFM than car (68%) air (65%) and local buses (61%) for their journey. The figures for underground were 59% and long distance coach 46%. However, as raised in the qualitative stage, often these different travel methods do not provide realistic alternatives to rail travel. This can frustrate perceptions of the rail service as this lack of choice renders passengers powerless to do anything about poor service issues.
- Of all the possible VFM ideas proposed the ten tickets for the price of eight idea held very high appeal for less frequent commuters. Also the price of an invalid ticket contributing towards the price of the new correct ticket had high appeal. Two thirds (67%) said this was very appealing. Many passengers felt the current situation was another example of the rail companies taking advantage of passengers.
- Paying for a season ticket in 12 monthly instalments was also popular, especially amongst those currently using a monthly season ticket.

5. Main Findings

5.1. Attitudes towards rail travel

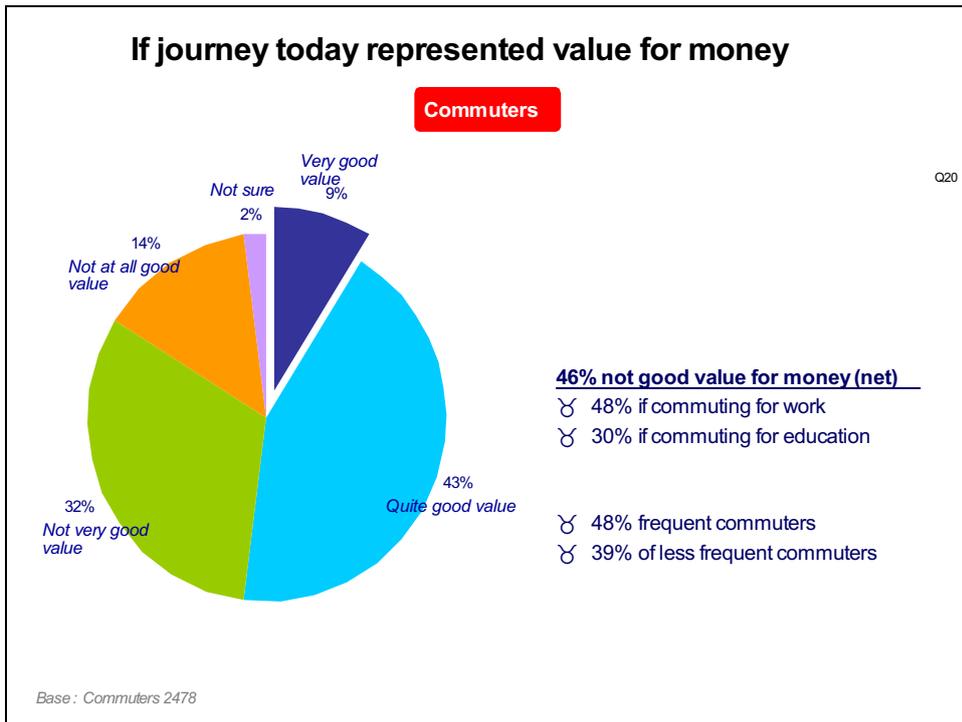
Spontaneous associations with rail travel are generally negative – key associations include delays, cancellations, poor communications, queuing, lack of seating, crowded, dirty, stressful, hot and expensive. However, positive associations also exist, including relaxing, direct, quick and ‘me time’.

Clear differences emerge by the type of traveller. Commuters were generally more negative and typically displayed a more demanding, resentful attitude than other passengers. Commuters tend to use the train because it offers a quicker journey than other transport types. Often other transport types are just not a viable option (for example there is no parking available at the destination) and as such commuters feel that they are ‘over a barrel’, which may explain their negative attitude towards taking the train.

“You fight for a seat if it’s rush hour. It’s just a nightmare” (London Commuter)

For these reasons nearly half (46%) felt their commuting journey did not represent value for money. This question was worded slightly differently to the one used on the current NPS survey which will account for the different VFM ratings achieved on the two surveys.

Table 5



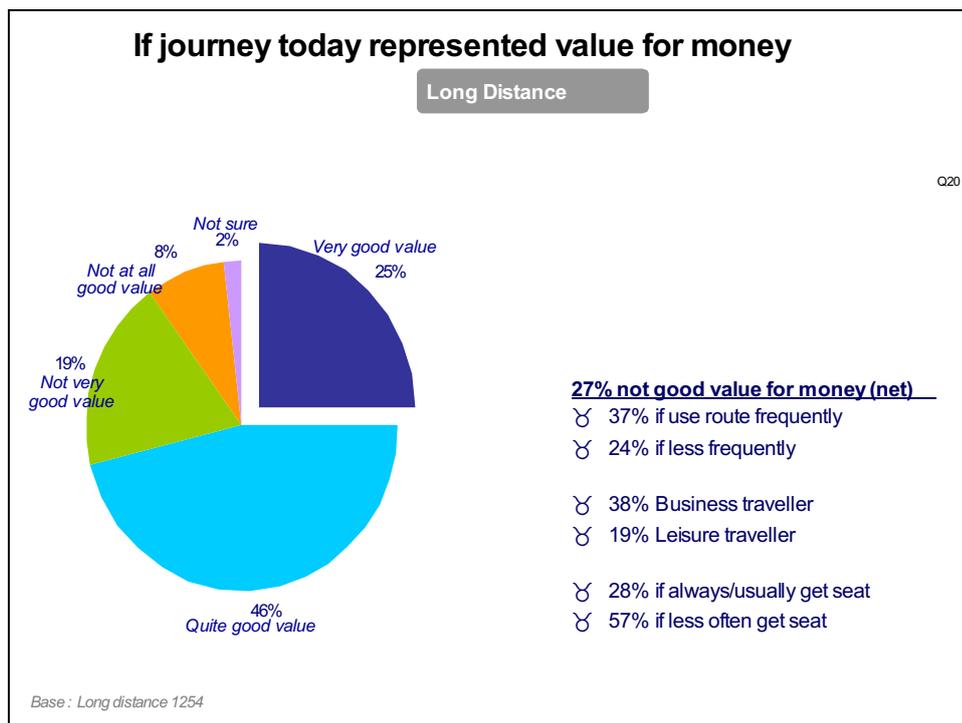
Long distance business and leisure travellers, on the other hand, were generally more positive in their attitudes towards using the train and when describing their typical journeys. For them, key associations are that rail travel is quick, relaxing, direct, provides value for money and offers time to read or work. For this type of passenger, the use of the train is often a positive choice over other alternatives, rather than due to a lack of alternatives, and this may explain why they are generally more positive towards train travel.

“It’s very convenient because it takes the onus away from worrying about parking, and you can work while you’re on the train” (Cardiff Off-Peak Traveller)

“They are usually on time, you don’t have to change and there are lots of them. It’s good if you’re going down to London for a meeting” (Leeds Business Traveller)

For these reasons the number of long distance passengers not rating their journey as being VFM was noticeably lower (27%) than for commuters (46%).

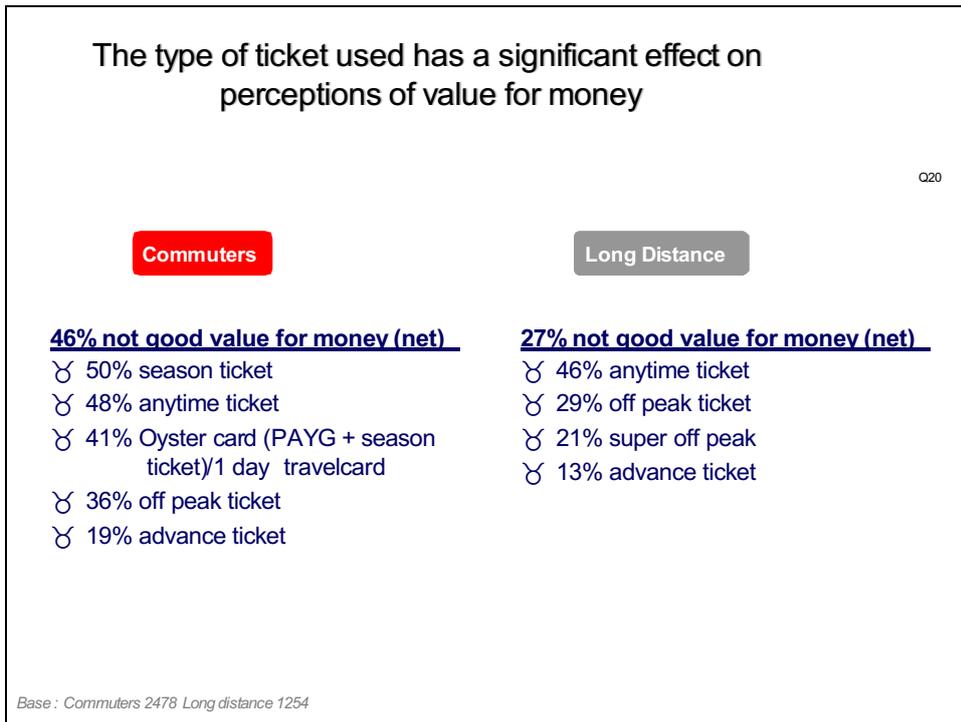
Table 6



The type of ticket used by both groups affected perceptions of VFM. Commuters who used season tickets were the most dissatisfied (50%). Nearly four in ten commuters (39%) had been doing the same commute for over 5 years and besides being possibly travel weary from the same journey these commuters will have had greater exposure to price rises and journey problems which may further contribute to their lower VFM rating.

For long distance travellers those who purchased the more expensive 'anytime' ticket expressed the greatest dissatisfaction. VFM does rise considerably for those using 'advance purchase' tickets, which are the cheapest type of ticket available.

Table 7



5.2. What drives perceptions of value for money?

Unsurprisingly, value for money is inextricably linked to price. If something is perceived to be expensive, expectations are higher and if something is perceived to be cheap, expectations are lower and some allowances can be made.

To explore these issues further the quantitative research asked passengers to say in their own words why they felt their journey either represented, or did not represent value for money. The tables below summarise the views of those who said their ticket represented VFM (shown under the column headed 'yes'), and those who did not (shown under the column marked 'no'). Sometimes people made both positive and negative comments about their journey (i.e. even if they felt the journey was VFM they sometimes made a negative comment as well). For this reason figures appear in both columns.

As shown in Tables 8 and 9 many reasons were given as to why a journey did, or did not, represent VFM. However, as observed in the qualitative research price, punctuality and seating dominate most passengers' point of view.

Table 8

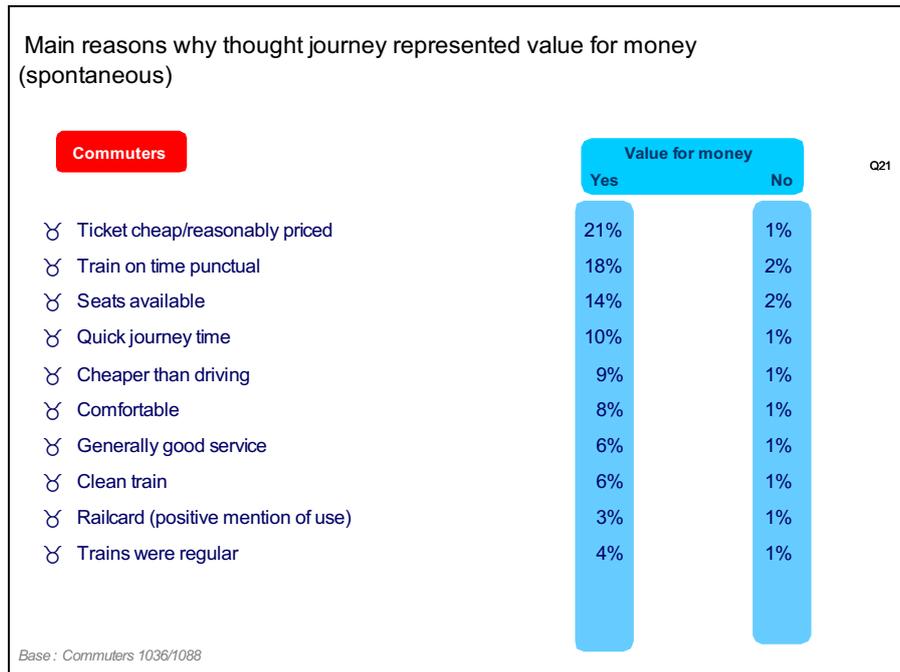


Table 9

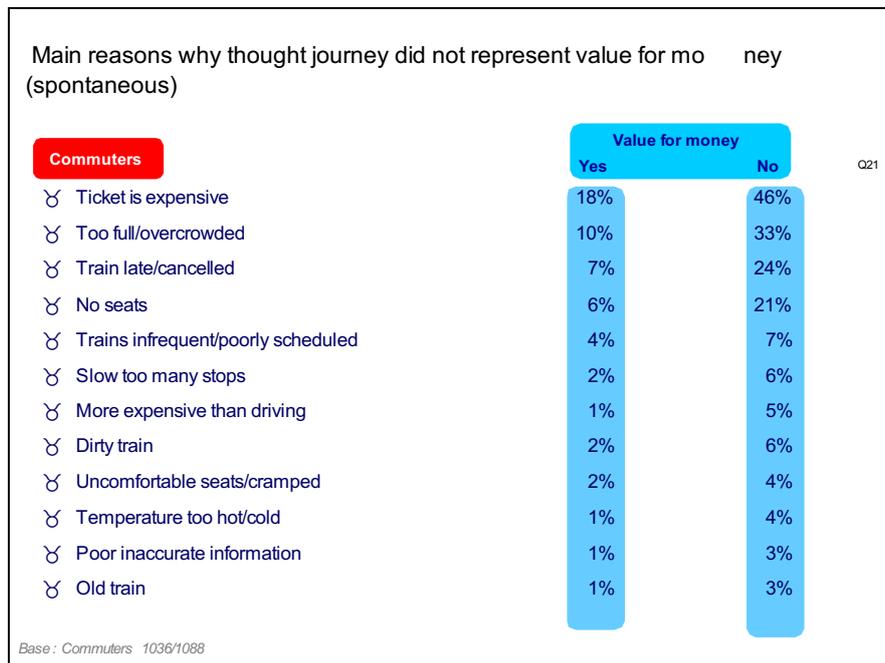


Table 10

Long Distance	Value for money		Q21
	Yes	No	
	Main reasons why thought journey represented value for money (Spontaneous)		
☒ Ticket cheap/reasonably priced	39%	3%	
☒ Train on time punctual	9%	1%	
☒ Seats available	4%	1%	
☒ Quick journey time	7%	1%	
☒ Cheaper than driving	7%	1%	
☒ Comfortable	7%	1%	
☒ Generally good service	6%	1%	
☒ Clean train	4%	-	
☒ Railcard (positive mention of use)	5%	1%	
☒ Relaxing	4%	-	

Base : Long distance 751/326

Again price, punctuality and seating dominate, however more emphasis is placed on comfort by long distance passengers.

Table 11

Long Distance	Value for money		Q21
	Yes	No	
	Main reasons why thought journey did not represent value for money (spontaneous)		
☒ Ticket is expensive	17%	55%	
☒ Too full/overcrowded	5%	15%	
☒ Train late/cancelled	3%	14%	
☒ No seats	2%	7%	
☒ Trains infrequent/poorly scheduled	2%	4%	
☒ More expensive than driving	3%	11%	
☒ Slow too many stops	2%	7%	
☒ Dirty toilets	1%	3%	
☒ Generally Uncomfortable	1%	4%	
☒ More expensive than flying	1%	5%	
☒ Poor buffet service	1%	4%	
☒ Staff unhelpful	-	4%	
☒ Complicated to purchase ticket	1%	2%	

Base : Long distance 751/326

5.2.1. VFM and Journey Type

When thinking about the VFM of rail travel, passengers judge all journeys by different criteria, and there is no one clear definition of a 'value for money rail journey'. A complex relationship exists between several factors, meaning that all journeys are not judged on the same basis. These factors include:

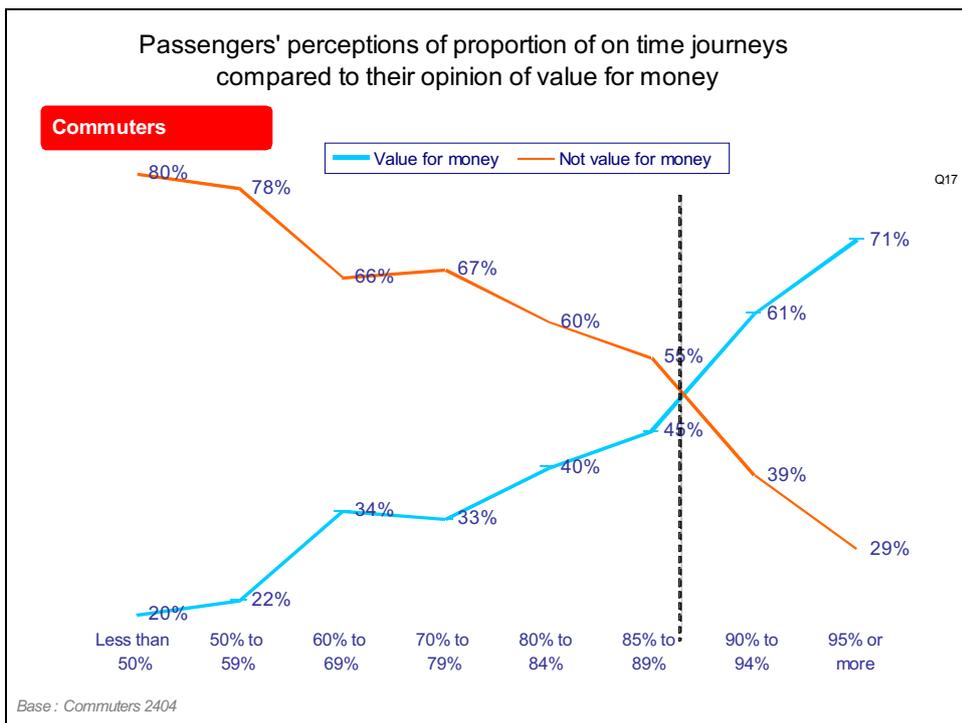
- The price of the journey – the cheaper the ticket, the better value it is considered to be
- The purpose of the journey – there are different satisfaction drivers for leisure, business and commuter journeys as passenger priorities are different, and these are explained further below
- Other circumstances – numerous other factors can influence drivers of satisfaction with value for money, for example whether the passenger is travelling alone or with others, the time of day or day of the week, whether the passenger is impaired in any way or the length of the journey

5.2.2. VFM and Punctuality and Seating

There are, however, two key factors that fundamentally drive satisfaction with value for money of rail travel, regardless of the price of the ticket, the purpose of the journey or any other factors. The first factor is the punctuality and reliability of the service. If services do not turn up on time, passengers wonder what exactly they are paying for, as the purpose of buying a train ticket is to get from A to B at an allotted time. This is considered a 'hygiene' factor of train travel, and if rail companies fail to deliver on this then value for money is seriously brought into question. The second factor is the level of comfort of the journey. Key criteria for judging comfort are whether sufficient seating is available, and if the train environment is clean. If comfort levels are deemed unacceptable, this again leads passengers to question value for money as they then believe they are paying money to spend time in an unpleasant environment. These two issues were strongly communicated at both the qualitative and quantitative stages.

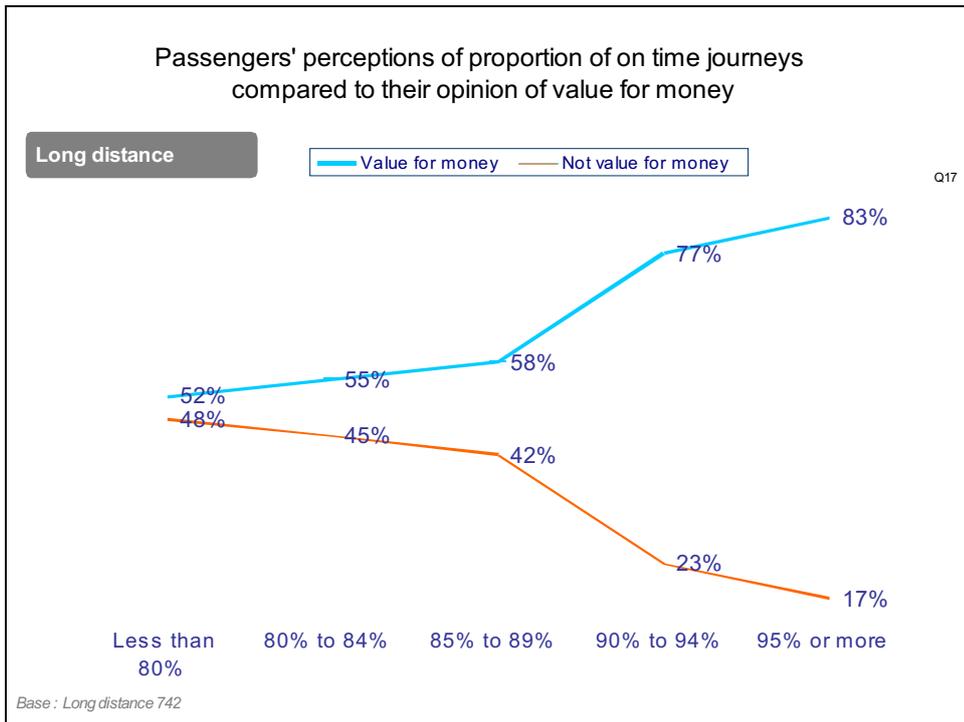
In particular when VFM is cross referenced by perceptions of journey punctuality and seat availability there is a direct correlation. As shown in Table 12 below those commuters who claimed 95% or more of their journeys were on time, 71% of these thought their journey represented VFM. At the other end of the scale of those who thought 50% or less of their journeys were on time, only 20% thought their journey represented VFM.

Table 12



A similar pattern emerged for long distance passengers although it was less extreme as VFM ratings were higher for this type of traveller compared to commuters.

Table 13



Seat availability was also a key factor that affected VFM perceptions and as shown in Tables 14 and 15 those less likely to get a seat on their journey give a much lower rating for VFM.

Table 14

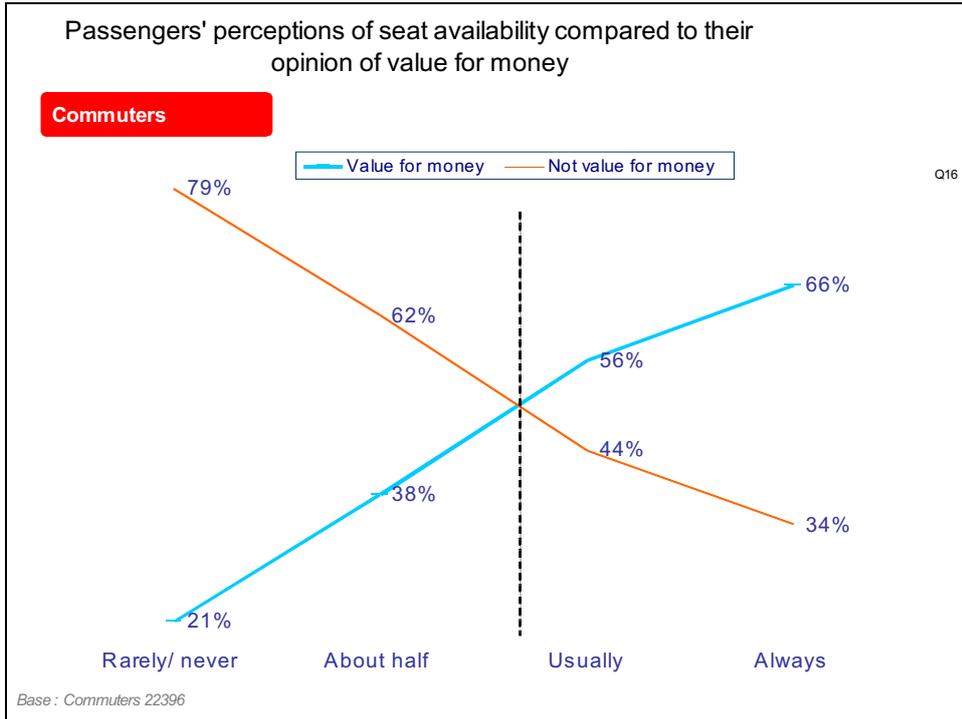
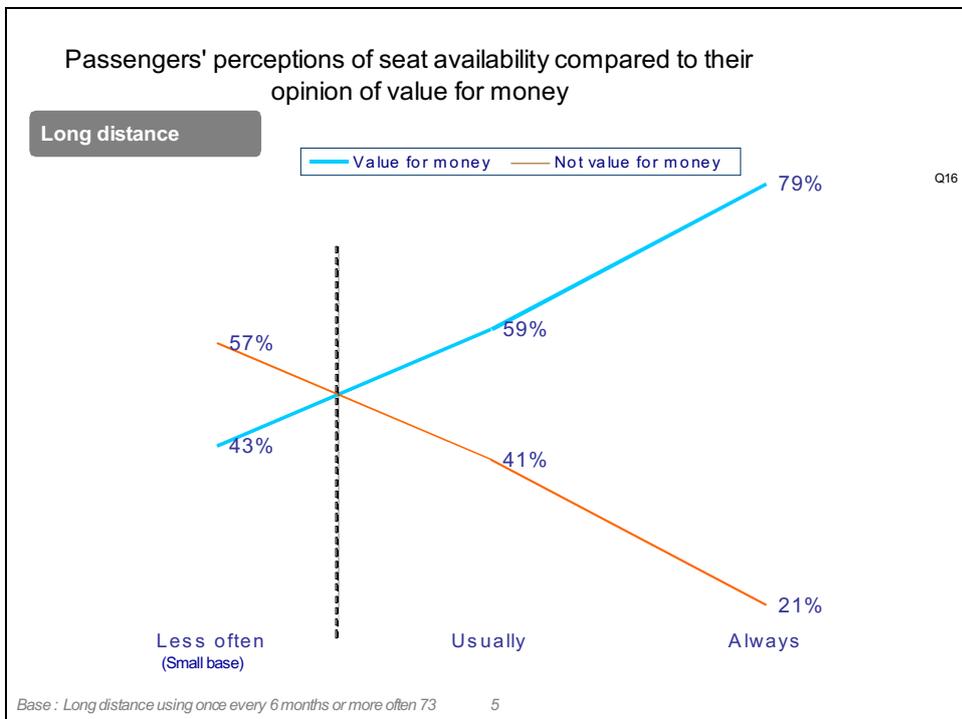


Table 15



5.2.3. VFM and Staff Communications

Another factor that influences satisfaction with value for money is communications. Although passengers accept that delays and disruptions will occur, how they are handled is key. Commuters in particular claim that when services are delayed or disrupted information is generally unavailable or kept to an unsatisfactory minimum. In addition, they claim that staff are generally not to be found in the event of delays and disruptions, and therefore are not available to answer questions. All of these lapses in communication are considered totally unacceptable, because they do not allow the passenger to plan an alternative journey or rearrange meetings. This leads to a high level of frustration and anger, and creates the impression for the passengers that the rail company does not care enough to convey the required information.

“If you’re told about something at least you can plan alternative measures, but if you’re kept in the dark you start to get anxious...is it going to be 5 minutes or 30?” (Cardiff Commuter)

*“It’s almost like they’re scared to tell you there’s a delay, when in fact it’s because they’re not telling you what’s going on that you start to get really annoyed with them”
(Manchester Commuter)*

Long distance travellers (whether for leisure or business) were, however, more likely to claim that communications are good when delays occur.

5.3. Stated Preference

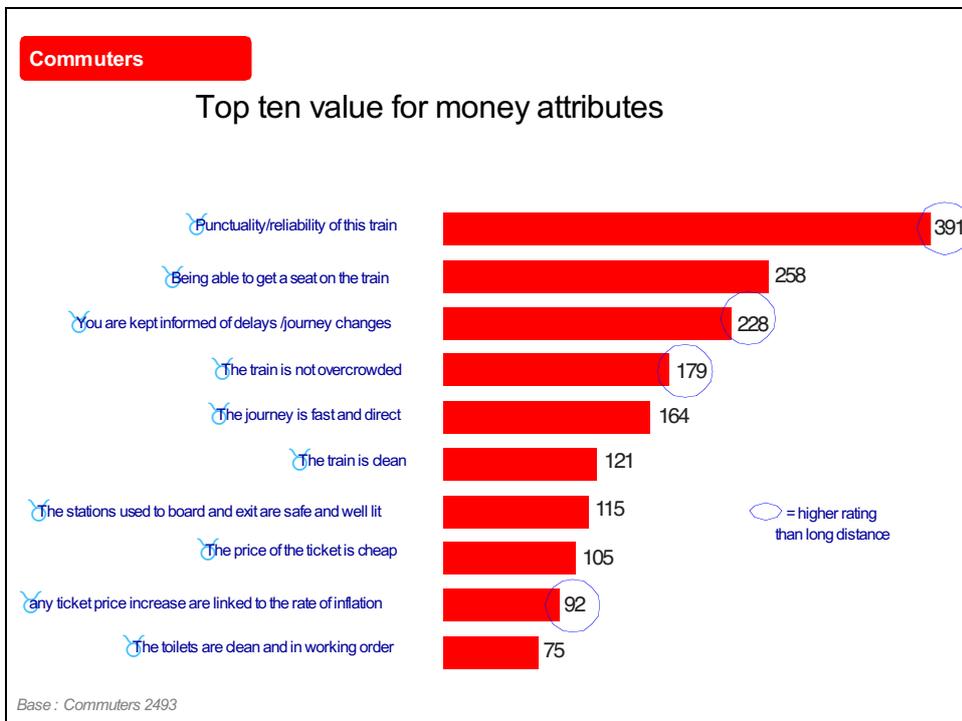
To further evaluate all the factors that might affect VFM a total of twenty three attributes that may influence passengers’ perceptions of VFM were measured. The list of items was compiled mainly from information arising from the qualitative stage, as well as data from other Passenger Focus research. Using a paired preference question technique a total of thirty six pairs of factors were tested with passengers. For each pair passengers had to say which one they most thought was the larger contributor to VFM. Questions 24 and 25 on the questionnaire appended provide the full list of the twenty three statements tested. The full questionnaire has been supplied in the appendix on the accompanying CD.

This information was then analysed to provide an importance factor for each attribute thus enabling the issues that most influence VFM to be identified. Any factor

achieving a score of **over 100** indicates it had a greater influence on VFM than those that scored under 100. The higher the score the greater the influence.

Table 16 shows the top factors that most influence commuters' perceptions of VFM. Time is of high importance for commuters and the punctuality and reliability of the train was the key factor identified by the paired preference analysis that influenced VFM for commuters. Seating issues (again as already noted) comes second followed by clear information about delays and journey changes.

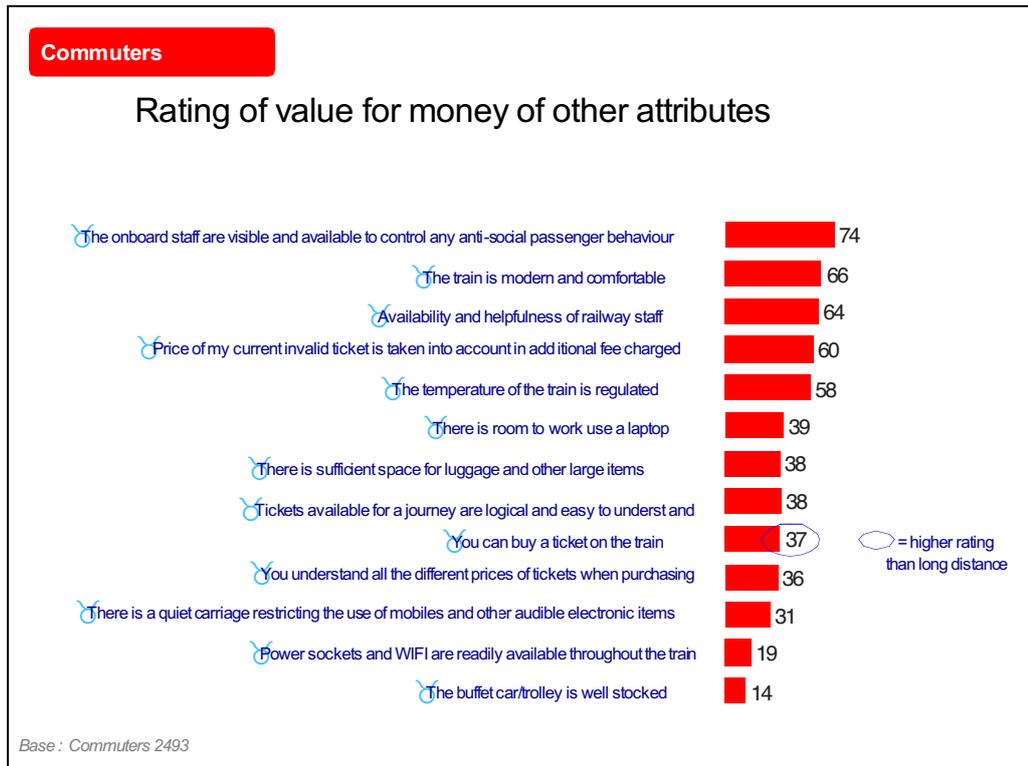
Table 16



The circled figures indicate those issues commuters gave a higher score for than the long distance passengers. However, as shown in Tables 18 and 19 on the most important VFM factors, views between the two types of passengers were quite similar.

The scores achieved by the remaining factors that did not appear in commuters' top ten are shown in Table 17.

Table 17



The top ten VFM issues for long distance passengers were quite similar to commuters. Seating does achieve a higher score over punctuality, however punctuality does come a close second and is still extremely important. The scores that were noticeably higher for long distance passengers compared to commuters have been circled. Many of these concerned comfort issues such as clean trains and working toilets.

Table 18

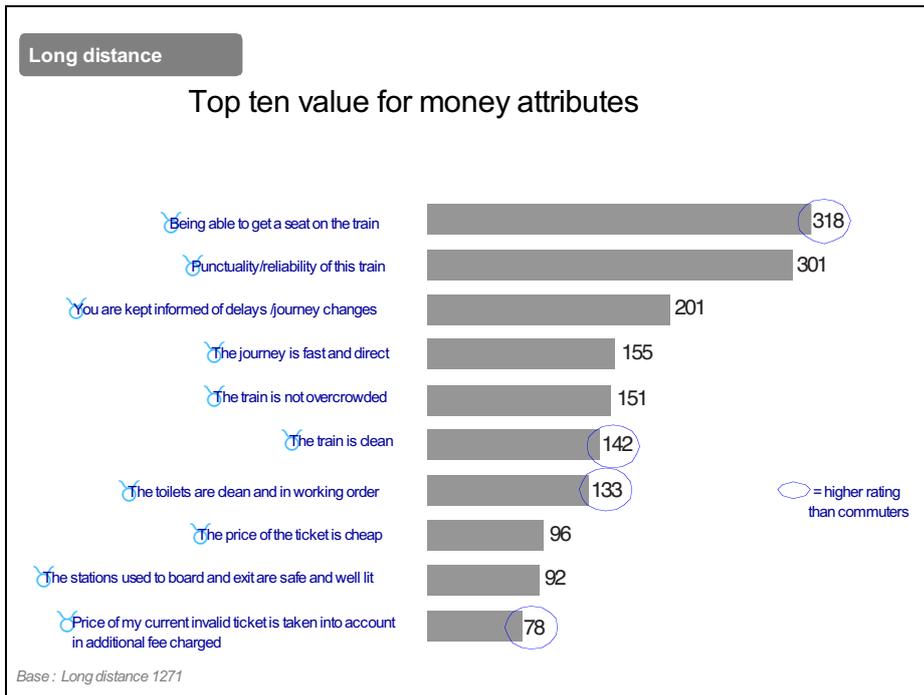
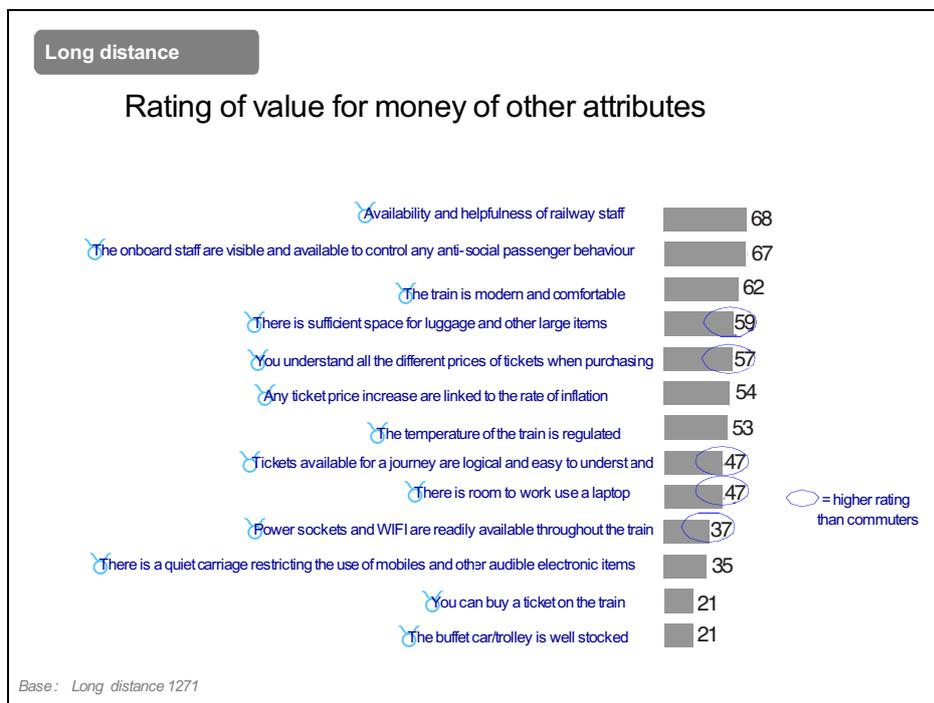


Table 19



For different types of passengers some factors obtained higher scores. For example the price of the ticket was more of an issue for those who felt their journey did not represent value for money.

- The price of the ticket is cheap (not VFM = 124, is VFM = 89)
- Ticket increases linked to inflation (not VFM = 92 is VFM = 66).

Business travellers attached more importance to speed, comfort and working space

- The journey is fast and direct (business = 171, leisure = 149)
- The train is modern and comfortable (business = 75, leisure = 53)
- There is room to work/use laptop (business = 69, leisure = 36)
- Power sockets and WIFI available (business = 48, leisure = 28)

Women considered safety issues at stations.

- The stations used to board and exit are safe and well lit (Women = 130, Men = 87)

First class travellers wanted clean trains and good toilets

- The train is clean (First = 162, Standard = 128)
- The toilets are clean/working (First = 142, Standard = 87)
- There is room to work/use laptop (First = 81, Standard = 38)
- Power sockets and WIFI available (First = 50, Standard = 23)

5.4. Impaired passengers and perceptions of value for money

The views of impaired passengers were explored during the qualitative stage. Generally, the views of visually, hearing and mobility impaired passengers were in line with other passengers in terms of key drivers of satisfaction, although some of these may be exaggerated depending upon the nature of the disability (for example overcrowding or lack of seating can be particularly pertinent for a mobility impaired passenger). However, failure of rail companies to deliver on specific needs relating to specific impairments can impact further upon value for money satisfaction.

For mobility impaired passengers, the accessibility of the station itself and the trains and the ability to get a seat once on the train are key factors. For hearing impaired passengers clear announcements are crucial and in-station display boards should be kept up to date (in case announcements are missed). For visually impaired passengers clear signage both on the train and in stations is essential, as are clear announcements (in case signage cannot be read).

The availability, attitude and helpfulness of staff is particularly important to impaired passengers. This is because staff are relied on, perhaps more than by other passengers, for providing information, helping passengers navigate the station, providing extra support in the event of delays and disruptions, enforcing the availability of disabled seating, helping with luggage and helping passengers to purchase their tickets. Attitude is particularly important, as impaired passengers claim that they often feel staff members do not recognise the particular stresses and difficulties that they experience when travelling on public transport.

“There’s no way for people in a wheelchair to go in (to the station). There isn’t a ramp, it’s stairs, it’s no help at all” (Mobility Impaired)

“If someone was there and could just basically help you, carry your luggage, show you the way, make sure you’re not going the wrong way in stations, which would be so helpful” (Visually Impaired)

5.5. The impact of overcrowding in Cardiff

Respondents in the Cardiff focus groups were asked specifically about overcrowding on their services. Interestingly, in both Cardiff groups, ‘crowded’ or ‘overcrowding’ was the most top of mind association with rail travel. The majority of respondents claimed it is normal to be unable to get a seat on trains travelling into Cardiff in the morning, and some claimed they often have to let several trains go past before being able to board at all.

When asked if they would be willing to pay higher fares to address this problem, respondents were universally indignant. They believe that the availability of seating should be an unconditional aspect of train travel – not a luxury you pay more for. In addition, they were cynical that price increases would indeed solve the problem. This

is based on their perception that although ticket prices increase every year already, the overcrowding issue never improves.

“The value for money issue is the fact that you don’t get a seat. If you got a seat with the prices now, it would be value for money, but if they bung the prices up then it wouldn’t be value for money again” (Cardiff Off-Peak Traveller)

“You don’t get a discount for standing in a foot well five days a week, so why should I pay more for a seat?” (Cardiff Commuter)

Increased frequency of services was not viewed as an appropriate solution either. This is because generally there are no issues with the frequency of trains, however there were spontaneous requests that the trains have more carriages, and this was thought to be the most effective way of dealing with the overcrowding situation.

5.6. The influence of the media on perceptions of value for money

Passengers claimed that there is often reporting in the media regarding the price of tickets, particularly when annual fare increases are announced or implemented. There is also a perception that media reporting is often sensationalist, and focused on negative stories (for example trains that break down trapping the passengers for several hours), however they philosophically acknowledge that negative stories sell papers and that the media is inclined to look for ‘scandal’.

With this in mind, they claim that media reporting does not unduly affect their perceptions of value for money, but admitted it can increase negative perceptions of train travel if they happen to have had a bad journey on the day of the reporting.

5.7. Value for money of rail travel versus other forms of transport

Compared with other forms of transport, rail travel is often thought to offer good value for money; however the reasons for this may differ depending on the mode of transport it is compared to. This is explained further below. It should be remembered when reviewing this data that all interviewed were rail users and if regular users of these other methods of transport had been interviewed their views may well have been different.

Driving

When determining the value for money of driving, respondents predominantly consider petrol and parking costs. Few consider the other costs of running a car such as maintenance, tax or insurance. Although driving offers a certain degree of flexibility, especially on leisure journeys, rail is almost always a quicker mode of transport, and in addition to road journey times can be unpredictable due to traffic. For business travellers rail is a far superior method of transport, as it allows them time to work where the car does not. For this reason rail is generally considered better value for money due to the overall speed of travel. The exception to this is when several people are travelling together, for example a family of four or five people, as the cumulative cost of train tickets can quickly become more expensive than petrol and parking.

"It's dead time in the car. On the train you can work, it's much better"
(Leeds Business Traveller)

"If I drove to work it could literally take me half an hour, it could take me two hours. At least with the train you know roughly how long it's going to take"
(Manchester Commuter)

The VFM rail offered in comparison to the car was also measured at the quantitative stage. Amongst the Commuters just over two thirds (69%) rated rail better value than the car and a similar number of long distance passengers (66%) rated rail better value.

Local Buses

The majority of respondents claimed that local buses were nearly always cheaper than the train and furthermore were more direct, often door to door. However, buses were thought to be slow and unpredictable, making the bus a poor value alternative overall, particularly for commuters who value their time highly.

"If you value your time, the train is better value, even though the bus is cheaper"
(London Commuter)

Despite the buses being seen as cheaper rail is still considered better value by commuters. Just over six in ten commuters (61%) rated rail better value than local buses.

Underground (in London)

The underground was thought comparable with train travel on the basis of price of tickets and the overall journey experience. Some passengers do express a preference for the train on the basis that it is above ground and less 'claustrophobic' than the tube. One benefit cited of underground travel is that one ticket generally buys you access to the whole network (for example a day Travelcard) whereas train tickets are for one journey only. For the majority of respondents, perceptions of value for money of the train versus the underground is determined by circumstance – some can only use the underground, or only use the train, depending on where they live and work, and so the choice of which to use is not interchangeable.

"If there was a choice between overground and tube I'd always go overground. It's just not as sweaty and hot" (London Commuter)

For those commuters interviewed at the quantitative stage who were able to make a comparison with the underground opinion was divided as to which provided better value, 56% claimed it did and 44% it did not.

Flying

In some instances, respondents claim that flying can be more direct and cheaper than getting the train (assuming flights are booked well in advance through a budget airline). However, passengers do also consider the expense of getting to and from the airport (at both ends of the journey) and the extended time of flying once travel time to the airport and check-in periods are factored into the equation. In addition, the train is often thought to be more comfortable as one can stand up and move around, and more direct, as it delivers you straight to the city centre where flights do not. Therefore, on balance, respondents often thought that rail travel offered better value for money on UK journeys.

“We went to Scotland for a wedding on the train and some people flew. Ours was better value for money, it’s comfortable, you’ve got WiFi and we watched a DVD on the train, plus our journey was quicker than theirs” (London Commuter)

For those long distance passengers able to compare their journey to air nearly three quarters (71%) thought rail represented better value.

Long Distance Coach

Although this can be a cheaper mode of transport than the train, few would consider the coach as journey times are thought to be excessively long in comparison with the train. However the journey price does make coach travel competitive and of transport looked at in the research long distance coaches came the closest to challenging rail for VFM. Fewer commuters (45%) and long distance passengers (48%) rated rail as better value than they did for some of the other methods.

5.8. Perceptions of ticket types and ticket purchasing

While respondents were generally familiar with and knowledgeable about the various season tickets options available, the focus groups revealed some degree of confusion around the ticketing structure for non-season tickets. There is low awareness of the different ticket types available and this combined with the confusion felt means there is little understanding of the benefits of each ticket type, and as such it is hard for respondents to determine value for money of each ticket type.

‘Anytime’ tickets were understood to offer the greatest flexibility, but because of that were also thought to be the most expensive fares. For most leisure travellers it would not be necessary for them to have such flexibility in their tickets, and any desire for flexibility is often readily compromised to obtain a cheaper price. In addition, leisure journeys are typically booked in advance when the leisure ‘event’ (weekend away, day trip etc) is planned, therefore there is no need for an Anytime ticket unless they wish to travel at peak times or an advance ticket is unavailable. Business travellers were the group most familiar with the Anytime ticket, as they often require tickets that offer a high degree of flexibility at short notice.

Respondents were generally unable to discuss the ticket types Advance, Off-Peak Day, Super Off-Peak and Super Off-Peak Day due to a total lack of familiarity with

them. However, it should be noted that fare simplification was introduced on 1st September 2008 and the research was conducted in October and November 2008, therefore passengers had not been exposed to the simplified fares for very long at the time of the research, which may have impacted upon their apparent lack of understanding of fare structures.

It is commonly understood that the further in advance the ticket is booked, the cheaper it is, but it is also believed that the cheaper the ticket, the less flexible it is, therefore there is some trade-off between price and flexibility.

"It can be really good value if you get the timings right, book well in advance"
(London Commuter)

Typically respondents purchase advance tickets online, because it offers the opportunity to see a range of train times and fares at once. The most common ways to purchase tickets online were via the National Rail, National Express, and The Trainline websites.

When asked during the groups to estimate the cost of certain journeys, leisure travellers generally overestimated the prices, sometimes grossly. Business travellers, on the other hand, were closer to the correct figure. This is perhaps unsurprising due to the frequency of their travel.

There was some spontaneous mention across the groups that ticketing names and structure have recently changed with a view to simplification; however respondents were unable to articulate exactly what the changes were and claimed the system is still highly confusing.

"I think all the tickets are quite complicated. They need to streamline it better. There are different operators and there are different prices, off peak, returns, singles and the timetables are complicated on their own and then you've got different prices for different times of the day"
(Birmingham Leisure)

Passengers generally felt comfortable when discussing season tickets. They are much more familiar with these ticket types and have clear perceptions of the benefits and disadvantages of each type.

Daily tickets are thought to be good for ad-hoc needs, offering flexibility due to no need for commitment, and do not require a large cash outlay. However, the tickets can feel expensive, especially in London, and there are no benefits associated with long-term savings.

Weekly and monthly tickets were regarded as offering a happy medium (between daily and annual tickets) which is primarily driven by convenience, rather than cost saving. These types of season tickets mean there is no need to queue for a ticket daily, but still without a large cash outlay as an annual ticket requires. The cost savings between daily and weekly tickets or weekly and monthly tickets are considered negligible, especially if the ticket is not used at the weekend, or the passenger takes time off work.

Annual tickets are thought to offer the largest financial benefits, however there is a major barrier in terms of a perceived inflexibility of annual tickets. Respondents believe that there is no way of redeeming the ticket if required, with only 43% of weekly season ticket holders and 46% of monthly season ticket holders believing that they can refund their season ticket part way through the year should their circumstances change. This combined with the lump sum outlay required and that many are unsure of what they will be doing in twelve months and whether they will still need the ticket means that many are reluctant to purchase an annual ticket.

“An annual would be fine if you were prepared to commit to an employer for that long, but I’m not” (Cardiff Off-Peak Traveller)

Generally, season tickets and walk-up fares are purchased in person at the station as this is the most convenient option. Passengers were positive about the electronic ticket machines available in stations, although commuters did claim that purchasing or renewing their season ticket can be incredibly stressful due to the volume of passengers in the station, and it was not uncommon to miss your train as a result of

queuing. Purchasing in person also affords the opportunity to ask questions of station staff if necessary.

5.9. Peak and Off-Peak travel

Respondents were unsure about the definition of Peak and Off-Peak travel, and were not always clear as to when Peak times apply, although they generally believe the morning peak to be before 9am or 9.30am. Some respondents were unaware that there is an evening peak, and those who were aware thought it was between 4pm and 6pm.

The definition of Peak and Off-Peak times confuses passengers. They don't understand why there appears to be different definitions of what is Peak or Off-Peak, and so there is potentially an opportunity for greater clarity in communicating the definitions to customers so they can be sure they are well informed to choose the most appropriate ticket for their needs or plan their journeys in the most cost-effective way.

The concept of Peak and Off-Peak pricing is contentious for some passengers. This is because Peak prices are higher and yet journeys are generally considered more unpleasant at these times, as trains are busier, there is less chance of getting a seat and the environment can be hot and uncomfortable. Conversely, Off-Peak prices are cheaper and yet the passenger generally has a more pleasant experience. For some this lacks logic and leads them to question the value for money of train tickets.

"I love the irony of it that you pay less and get a seat (off-peak). But I don't have that choice. I'd get fired if I went off-peak all the time!" (Cardiff Commuter)

5.10. Understanding of how prices are set

Respondents know that train operating companies incur costs such as fuel, staff and purchase and maintenance of rolling stock. However, they are highly cynical regarding how ticket prices are set and believe they charge 'whatever they can get away with'. This cynicism is driven by several factors. Firstly, passengers believe that any increases in the price of tickets are random, and claims that increases are set to RPI + 1% do not resonate. Furthermore, no visible benefits are seen as a result of annual price increases, which implies to passengers that the increased revenue is not

going towards improving services (which is where they think it should be going). The range of prices offered for one journey and perceived illogical fare structures also influence passengers negatively. They do not understand why it could cost anywhere between £26 to £115 to get the same train from London to Manchester, why it is cheaper to buy two singles than a return, or why a return is sometimes only marginally more expensive than a single, and again these factors cause confusion and indicate a lack of transparency in fare-setting. Finally, passengers are generally unaware that there is any governing body or regulator for these issues (although they hope there is one), which leads them to believe there is no real sense of accountability or transparency.

“Train companies can charge you whatever they like because they know you can’t go somewhere else” (London Commuter)

“It’s more than salaries are going up. You’d be lucky if you get 3% rise. If the tickets are going up on top of that, it’s a bit extreme” (Birmingham Commuter)

5.11. Improving value for money satisfaction

During the group discussions, consumers were presented with ideas and suggestions for improving their satisfaction with value for money.

The ability to spread payment of an annual season ticket over twelve months

When discussing annual season tickets earlier in the groups, some respondents had spontaneously mentioned that this would be a helpful option, and overall when presented with the idea it was met with a positive response. However, it is only relevant to those for whom the major barrier to purchasing a season ticket was the large cash outlay, and in fact most of the respondents in the qualitative sample were deterred by the perceived long-term commitment. For the scheme to appeal, respondents would expect the payments to be interest free, and thought a small credit charge would be unacceptable in light of the fact they would be committing to using the rail service for twelve months. The idea of loans from employers was also positively received, and in fact some respondents’ employers already offered this option. It is thought convenient as money is taken from your wages prior to you receiving them which is convenient financially.

“It would be like a phone contract. Money would come out monthly as you get paid and you wouldn’t think about it that much ‘cos it’s just going out every month” (Birmingham Commuter)

Discounts for frequent commuters – 10 journeys for the price of 8

Response to this idea was very positive, as it was thought to be a fair way of offering benefits to those who would not benefit from having a season ticket. Again this idea was spontaneously suggested by respondents earlier in the group discussions. Some questions did however arise regarding the logistics of the scheme – for example whether there would be an expiry date on the journeys or a limit on what routes the tickets could be used on, and so on.

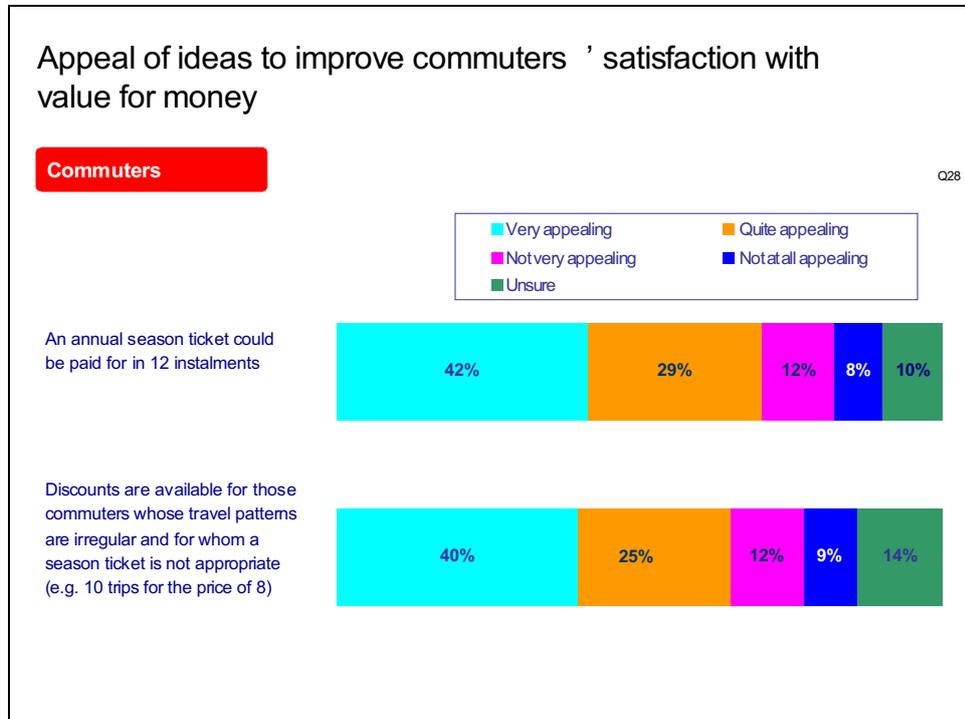
“In other countries you can buy a carnet of 10 tickets, I think that’s a really good idea”
(London Commuter)

Both the discounts for frequent commuters and paying for a season ticket in instalments were measured at the quantitative stage. As Table 20 shows there was quite high appeal amongst commuters for the idea of paying for an annual season ticket in 12 instalments. The number finding this idea ‘very or quite appealing’ rose to 83% amongst monthly season ticket holders indicating this would be a good group to target if the idea went ahead.

Amongst all commuters there was similar appeal for ten trips for the price of eight idea. Appeal increased considerably amongst the more infrequent commuters. In particular those saying this idea was either very or quite appealing rose significantly amongst any who commuted for education purposes (94%), part time workers (89%) and those who commuted less than three times a week 96%.

There was no difference in the appeal of these two ideas between those who thought their journey represented value for money and those who did not.

Table 20



Loyalty schemes for season ticket holders There were mixed responses to this idea. There was unanimous agreement that travellers should be given some sort of loyalty rewards, and this is a common approach today, with many citing the Boots Advantage Card as an example. However, there was a strong feeling that benefits should be rail-related e.g. ‘rail miles’, money off journeys or the opportunity to upgrade to first class. The benefits proposed during the group were considered by some to be insulting (such as supermarket vouchers or cinema tickets). This was because passengers would prefer that money was spent on improving rail services rather than providing free or cheap items such as coffees, and some regarded this as a ‘gimmicky’ way of trying to garner customer loyalty, because it is perceived to require little real effort or commitment from the rail providers.

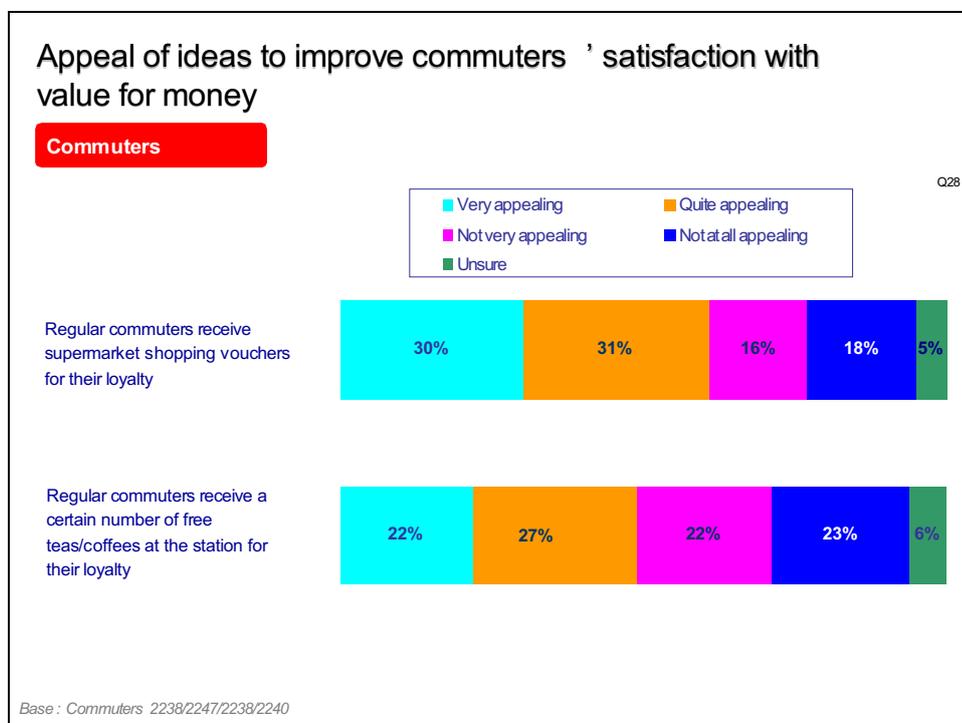
“I wouldn’t be sold by the fact that I couldn’t get to work on time, but when I get there, I suddenly get 10p off a coffee, that would wind me up big time, it’s missing the point”
 (Cardiff Commuter)

Business travellers were more positive towards the proposed benefits. This is possibly because they do not pay for their business rail travel themselves, so any vouchers or free coffees would be considered by them to be ‘perks’ of having to travel frequently on business.

“It would be good if they did a little loyalty card to actually use on the train – if you buy five coffees you get the sixth free” (Leeds Business Traveller)

The ideas of shopping vouchers and free teas and coffees were measured at the quantitative stage. Appeal for these was less than that expressed by commuters for the payment ideas (i.e. 8 for 10 and the 12 monthly instalments) mentioned in the previous Table. These types of ideas did have slightly higher appeal amongst women passengers 69% found the supermarket shopping vouchers idea either very or quite appealing compared to 54% of men. Younger passengers (i.e. those aged under 35 years) also found the ideas of more appeal. 71% of younger passengers found the supermarket idea of appeal compared to 57% of those aged 35 years or over.

Table 21



Gold Card giving 1/3 off all other off-peak fares in your region with a 12 month season ticket

There was a neutral response to this idea. For those who were not interested in having an annual season ticket, this incentive was insufficient to encourage them to get one. Others were put off by the 'within your region' caveat, as generally rail travel which is not commuting is for leisure purposes and therefore is likely to be out with the region. One or two respondents who were very frequent rail users were warm to the idea.

The ability to upgrade Advance Purchase Singles on the train to the relevant walk up fare if you miss your booked train

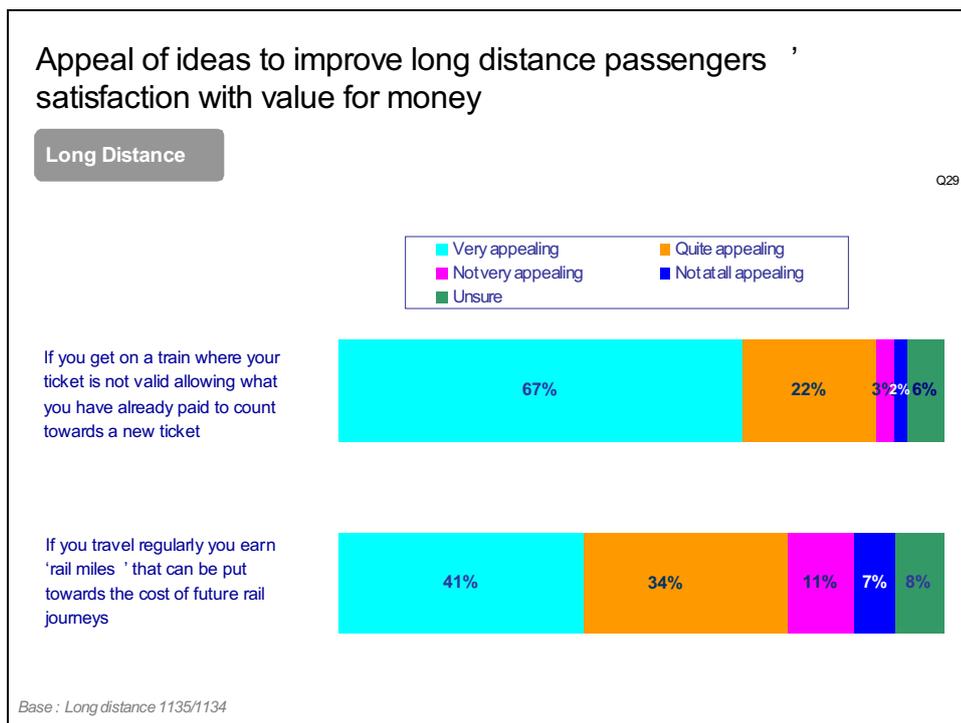
Response to this idea was extremely positive, particularly amongst business travellers, who earlier had claimed that the inability to do this was one of the most frustrating aspects of rail travel. The current situation is considered grossly unfair, especially if the alternative train taken is quiet and there are plenty of seats available, and overall perpetuates the image that rail companies are money-grabbing organisations.

"You see people on the train all the time getting done for being on the wrong train. Last week I saw a guy having to shell out 160 notes. It's not fair, the train was half empty anyway, you should be able to just pay the difference" (Leeds Business Traveller)

Concurring with the qualitative findings, the idea of the price paid for an invalid ticket counting towards changing this for the correct ticket held high appeal. Two thirds (67%) rated this 'very appealing' and a further 22% 'quite appealing'. The idea of rail miles was also explored at the quantitative stage and appeal for this was good especially amongst the long distance passengers who use the train more frequently (88% found this either very or quite appealing).

The rail miles idea has slightly higher appeal amongst women (80%) than men (68%). It was also more popular amongst younger, under 35 year old passengers (90%) than those aged over 35 years (70%).

Table 22



5.12. Presentation of ticketing options – trading up for a flexible ticket v trading down for a restricted ticket

Respondents were presented with the following scenarios for discussion:

Scenario A	Scenario B
A two hour journey from London	A two hour journey from London
Reduced price tickets from £79.20 return £206 Anytime Return, valid on all trains in both directions £122.50 Off-Peak Return, not valid in the morning peak £79.20 Super Off-Peak Return, not valid in the evening peak	'Walk up' tickets from £79.20 return £79.20 basic return fare, valid on all off- peak trains £43.30 evening peak supplement, payable on top of basic fare to travel in the evening peak £126.80 morning and evening peak supplement, payable on top of basic return fare to travel in the morning and evening peak

When presented with the scenarios, passengers were initially cynical. They identified them as two different ways of presenting the same information, and as a result saw it as another way that rail companies were trying to 'confuse them' into not getting the best value. However, upon further discussion the overall preference was for Scenario B as the initial price point was not so shocking.

"I think I'm drawn to the pricing that starts off low. Just seeing that £206 makes me want to get the car" (Birmingham Leisure)

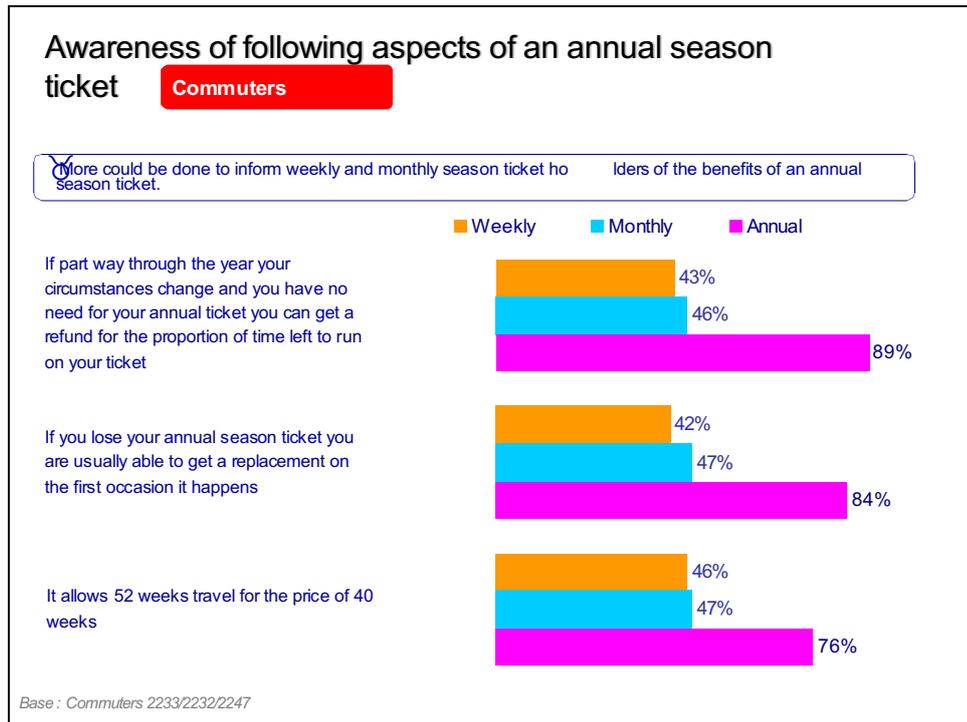
5.13. Commuters' awareness of the benefits of an annual season ticket

A high proportion of commuters who held an annual season were aware of the following benefits it offered:

- You can get a refund if part way through the year your circumstances change and you no longer have a need for an annual ticket (89% were aware)
- If you lose your ticket you can get a replacement the first time it happens (84% were aware)
- It allows 52 weeks of travel for the price of 40 weeks (76% were aware).

Awareness of these benefits does drop amongst monthly and weekly season ticket holders. As shown in Table 23 below awareness of the refund on a season ticket drops from 89% amongst annual ticket holders to 46% amongst monthly holders and 43% amongst weekly holders. Similar drops also in awareness also occurred for the replacement of lost tickets and the cost being equivalent to 40 weeks of travel. Perhaps, if awareness of the benefits an annual ticket offers were more heavily communicated to weekly and monthly ticket holders the take up of an annual ticket might increase.

Table 23



6. Conclusions

- Both the qualitative and quantitative research identified that VFM is fundamentally linked to price. In particular advance ticket purchasers (these are the cheapest types of tickets available) expressed the greatest satisfaction with VFM.
- Two key factors directly impact on VFM perceptions:

(1) Punctuality and reliability. There is a direct correlation between a passenger's perceptions of train punctuality and VFM. This is especially strong amongst commuters where 71% of those who perceived over 95% of their journeys were on time rated the service as providing VFM. In comparison only 20% of commuters who believed less than 50% of their journeys were on time rated the service as VFM, especially amongst commuters.

(2) Overcrowding. Again a direct correlation between overcrowding and VFM was found to exist by the research. For example 66% of commuters and 79% of long distance passengers rated their journey as providing VFM if they perceived they always had a seat for their journey. The respective VFM ratings for those who rarely or never got a seat were 21% for commuters and 43% for long distance passengers.

Both these were mentioned often in the qualitative research stage and further confirmed in the quantitative stage by the paired comparison analysis which identified these two as the top two most important factors that affect VFM perceptions.

- The third and other very important service aspect that affects perceptions of VFM is keeping passengers informed of any delays and journey changes.
- More could be done to educate passengers on the different types of tickets available. The qualitative stage especially identified considerable confusion amongst passengers as to what the typical price of ticket was and why there was such a wide fluctuation in prices, and as a result it is difficult for passengers to determine if they have purchased the best value ticket. This adds to passengers' perceptions that train

companies are trying to confuse them in order to get them to pay higher prices, and thus impacting negatively on value for money perceptions.

- Awareness of the different benefits of an annual season ticket (e.g. it allows for 52 weeks of travel for the price of 40 weeks) was noticeably lower amongst weekly and monthly season ticket holders than for annual season ticket customers. Perhaps greater awareness of this may help increase purchase and use of annual tickets. The idea of paying for a season ticket in 12 monthly instalments was popular especially amongst those currently purchasing monthly season tickets.
- Several of the VFM ideas that were tested amongst passengers had high appeal. These were ten tickets for the price of eight which was especially popular amongst the less frequent commuters. Also long distance passengers were especially receptive to the idea of the price of an invalid ticket contributing towards the price of a new ticket.
- The qualitative research revealed that any loyalty scheme should ideally benefit a passenger's rail travel; otherwise it might appear gimmicky and further exacerbate VFM perceptions.

APPENDIX I: QUALITATIVE DISCUSSION GUIDE



J9504 FINAL Discussion Guide
Improving Satisfaction with Value for Money
2 hour groups

Research Objectives: to understand...
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|---|
| <ul style="list-style-type: none">• Drivers of satisfaction and dissatisfaction with value for money with train tickets• How the rail industry could improve passenger satisfaction with value for money |
|---|

1. Introduction / warm up	(10 MINS)
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- Moderator / CR introduction
- Topic for discussion: Rail travel
- Group length: **2 hours**
- Confirm MRS guidelines / confidentiality / video & audio-recording / observers
- Respondent introduction:
 - Occupation
 - Lifestyle
 - Home set up
 - Hobbies
 - Main method of transport used and why

2. Role of rail travel	(10 MINS)
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- Associations with rail travel (on flipchart)
- Three words to sum up rail travel
- Likes / dislikes
- Advantages / disadvantages
- Triggers / barriers for travelling by rail
- On what occasions do you use the train?
- How does rail travel fit with other methods of transport?
- How do they decide which method of transport to use?

Moderator: First discuss all rail travel behaviour generally, before focusing on business, commuting or leisure as appropriate to the group.

- When: frequency of rail travel, journey length and usual travelling times
- Where: where from and to
- Who: do they travel on their own or with other people?
- Usual purpose of rail journey: including business, commuting and leisure
- Do they make some journeys regularly and other journeys occasionally?

3. Satisfaction / dissatisfaction with rail travel	(10 MINS)
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We are now going to focus on commuting / business / leisure travel (as appropriate)

- Generally how would you describe the experience of making this journey type by rail?
- What do you like about it?
- What do you dislike about it?
- Briefly ask for the main factors that influence satisfaction (without prompting):

4. Value for money specific	(30 MINS)
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- Thinking specifically about your last journey, what elements impressed you and what didn't
- Still thinking about your last journey, did you feel that it represented good value for money?
- Reasons for satisfaction / dissatisfaction
- Probe in depth on the impact of the following on value for money:
 - Journey purpose (business, commuting, leisure)
 - Journey type (single v return)
 - Length of journey
 - Time of day / day of week
 - Ticket price
 - Availability of other transport options
 - Total journey cost (e.g. car parking fees)
 - Punctuality and reliability
 - Length of journey time
 - Frequency of trains on that route
 - Room to sit and stand
 - Availability of staff on the train
 - Staff (helpfulness, pleasantness, knowledge levels, availability etc)
 - Presentation and cleanliness of stations
 - Presentation and cleanliness of trains
 - Managing delays/service disruption
- Does what you see and hear in the media about railways and train fares influence your view (about value for money)?
- How does rail travel compare with other modes of transport in terms of value for money, and why? Probe on:
 - Driving
 - Bus (for short-distance journeys)
 - Coach (for long-distance journeys)
 - Plane (for some long-distance journeys)
 - Underground / DLR / Tram (as appropriate)
- How do you determine value for money of these other modes of transport?
- On what basis do you compare them to rail travel (petrol, parking, insurance, tax, travel time)
- What product, service or brand do you feel offers you good value for money – and why

For long-distance groups only:

- On a post-it note and without conferring, what approximate price comes to mind when you think about the following return journey travelling Standard Class and on the day of travel (peak and off peak)
 - * Group 2 and Group 4 – London-Bristol, London-Manchester
 - * Group 7 – Birmingham-Bristol, Birmingham-Newcastle
 - * Group 9 – Leeds-London, Leeds-Bristol

5. Ticket purchase and fare systems
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(25 MINS)

- Satisfaction/dissatisfaction with ticketing (on flip chart)
- What types of tickets are available for rail travel? (note any spontaneous awareness of Fares Simplification, i.e. introduction of Anytime, Off-Peak, Off-Peak Day, Super off-peak, Super off-peak day and Advance names)

Write on cards: if not mentioned include annual season ticket, monthly season ticket, weekly season ticket, one-day travel card (London only), Anytime, Off-Peak, Off-Peak Day, Super Off-Peak, super off-peak day, Advance.

For each ticket type, ask:

- Do you ever buy this type of ticket? In what situations? Ask for examples
- Benefits of this ticket type (*probe in depth with season ticket holders*)
- Disadvantages of this ticket type
- Triggers to purchase
- Barriers to purchase (*probe in depth with season ticket holders*)
- Value for money of this ticket type
- Improvements to this ticket type / what would encourage you to purchase
- How do you think train companies decide what to charge? What costs do they incur in providing your train service?
- Awareness that **some** ticket types are regulated to inflation plus 1% per year (which currently means around 6%)? Which ones?

For Advance tickets ask:

- Benefits of single leg Advance tickets?
- Disadvantage of single leg Advance tickets?
- Experience of finding Advance tickets for the journeys you want to make?

- Where do you normally purchase your ticket from? (in station, online etc)
- How would you describe that process? What is good / bad about it?
- How could the purchase process be improved? Why?
- How do you decide which ticket type to purchase?
- How easy is it to choose the most appropriate ticket?
- Do you ask for information / advice? From whom?
- How do you know you've bought the best value ticket?
- If booking in advance, how far in advance would you book? *Probe on different scenarios e.g. business v leisure weekend v holiday travel*
- Does the process of buying a ticket feel different depending on what type of ticket you're buying? (walk up v pre-purchase v season ticket)
- How is it different?

- What would you improve about the ticket buying process?
- How could trust and confidence around the availability of cheaper tickets be improved? For example, being able to see how many are available at X price.
- Many 'walk up' single tickets are £1 or 10p cheaper than a return ticket. Views about this?

6. Improving value for money satisfaction
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(10 MINS)

Moderator: Ask respondents to work in pairs to describe the ideal rail journey (commuting, business or leisure as appropriate to the group) in terms of value for money. Explain that the focus is not just on price (i.e. cheap tickets) but what a 'value for money' experience would be like.

What should the journey be like? How would it be different from the journeys you make now? How could facilities / services be improved? What are the most important elements to consider? Respondents to feed back to the group, then discuss:

- Reaction to ideas?
- What are the most important elements of the journey overall?
- What elements increase / decrease sense of value for money?

7. Reaction to specific ideas

(20 MINS)

Moderator: to what extent would the following ideas help improve satisfaction with value for money? Probe on likes / dislikes of each concept

Commuters / season ticket groups:

- Spreading payment over 12 months
 - Interest free?
 - Reasonable charge for credit?
 - Loan from employer?
- Loyalty scheme for season ticket holders
 - Benefits in recognition that you are a loyal customer (e.g. Tesco / M&S vouchers, voucher for the occasional free coffee at a station, cinema tickets etc.)
- Discounts for people who are frequent commuters, but whose travel patterns are irregular and a season ticket isn't suitable (e.g. 10 trips for the price of 8)
- Emphasising the benefits of a season ticket (i.e. 52 weeks for the price of 40, price per day, additional benefits like Gold Card in London and the South East)
- Gold Card: being given 1/3 off all other off-peak fares in your region if you bought a 12 month season ticket

Long distance groups:

Moderator to unveil the approximate price respondents gave for the two journeys relevant to the group, along with the actual prices – see Appendix A

- Briefly probe what is behind any significant differences between the guestimated price and the actuals
- The high fares charged for long distance journeys at peak times may be influencing passenger satisfaction with value for money more generally. Would passenger satisfaction with value for money improve if fares are presented as trading up for a more flexible ticket (which might be viewed as 'superior'), rather than being presented with very high Anytime fares, but encouraged to trade down to something more restrictive (which might be viewed as 'inferior')? The fares themselves would not change. Show card attached as Appendix B.
- Loyalty schemes. As you spend more you get gestures of appreciation (e.g. discounts, Tescos vouchers, an occasional free coffee/sandwich etc.)
- Advance Purchase Singles
 - The ability to upgrade on the train to the relevant walk-up fare if you have missed your booked train (i.e. instead of having to buy a brand new ticket with no allowance given for what you have already paid)
- What other ideas can you think of that would improve value for money satisfaction (write on flipchart)

8. Summary

(5 MINS)

- Overall satisfaction with rail travel from value for money perspective?
- What are the three key improvements that would enhance perceptions of value for money?
- If they were responsible for increasing passengers' satisfaction with value for money, what would they do?
- Sentence completion handout:
"For me, a value for money rail journey would be one where...."

THANK RESPONDENTS AND CLOSE

Appendix A – Example fare prices

* Group 2 and Group 4 – London-Bristol, London-Manchester

London - Bristol

The lowest price of an Advance Single - £10

The highest price of an Advance Single - £59

The lowest price of a 'walk up' return, i.e. Super Off-Peak return (or Off-Peak if there is no Super Off-Peak) - £49

The highest price of a 'walk up' return, i.e. Anytime return - £137

London – Manchester

The lowest price of an Advance Single - £8

The highest price of an Advance Single - £91.50

The lowest price of a 'walk up' return, i.e. Super Off-Peak return (or Off-Peak if there is no Super Off-Peak) - £62.40

The highest price of a 'walk up' return, i.e. Anytime return - £230

* Group 7 – Birmingham-Bristol, Birmingham-Newcastle

Birmingham - Bristol

The lowest price of an Advance Single - £6.50

The highest price of an Advance Single - £26.50

The lowest price of a 'walk up' return, i.e. Super Off-Peak return (or Off-Peak if there is no Super Off-Peak) - £39.70

The highest price of a 'walk up' return, i.e. Anytime return - £68

Birmingham - Newcastle

The lowest price of an Advance Single - £11

The highest price of an Advance Single - £54

The lowest price of a 'walk up' return, i.e. Super Off-Peak return (or Off-Peak if there is no Super Off-Peak) - £82.20

The highest price of a 'walk up' return, i.e. Anytime return - £138

* Group 9 – Leeds-London, Leeds - Bristol

The lowest price of an Advance Single - £11.25

The highest price of an Advance Single - £59

The lowest price of a 'walk up' return, i.e. Super Off-Peak return (or Off-Peak if there is no Super Off-Peak) - £79.20

The highest price of a 'walk up' return, i.e. Anytime return - £206.00

Introducing *Simpler rail fares*

New names for rail fares are being introduced across the National Rail network.

The new names bring together commonly used Single and Return fares into three categories. The new names describe when you can buy or use a ticket making it easier for you to buy the best value ticket for your journey.

The word "ANYTIME" is displayed in a 3D, blocky font where each letter is contained within its own rectangular box. The letters are green with a slight shadow effect, giving them a three-dimensional appearance.

Buy any time, travel any time

Anytime fares are fully flexible tickets, with no time restrictions on when you can travel. Perfect for people who need complete flexibility.

The words "OFF-PEAK" are displayed in a 3D, blocky font. Each letter is contained within its own rectangular box. The letters are red with a white outline and a slight shadow effect, giving them a three-dimensional appearance.

Buy any time, travel off-peak

Off-Peak fares are cheaper tickets for travelling on trains that are less busy. Where there is more than one Off-Peak fare for a journey, the cheaper fare with more restrictions will be named **Super Off-Peak**.

The word "ADVANCE" is displayed in a 3D, blocky font where each letter is contained within its own rectangular box. The letters are dark blue with a white outline and a slight shadow effect, giving them a three-dimensional appearance.

Buy in advance, subject to availability

Advance fares are single (one-way) tickets offering great value for money on many longer distance journeys. You must book in advance and travel on a specific train service.

APPENDIX II: QUALITATIVE DISCUSSION GUIDE CARDIFF ONLY



J9504 Discussion Guide CARDIFF
Improving Satisfaction with Value for Money
2 hour groups

Research Objectives: to understand...
--

- | |
|---|
| <ul style="list-style-type: none">• Drivers of satisfaction and dissatisfaction with value for money with train tickets• How the rail industry could improve passenger satisfaction with value for money |
|---|

1. Introduction / warm up

(10 MINS)

- Moderator / CR introduction
- Topic for discussion: Rail travel
- Group length: **2 hours**
- Confirm MRS guidelines / confidentiality / video & audio-recording / observers
- Respondent introduction:
 - Occupation
 - Lifestyle
 - Home set up
 - Hobbies
 - Main method of transport used and why

2. Role of rail travel

(10 MINS)

- Associations with rail travel (on flipchart)
- Three words to sum up rail travel
- Likes / dislikes
- Advantages / disadvantages
- Triggers / barriers for travelling by rail
- On what occasions do you use the train?
- How does rail travel fit with other methods of transport?
- How do they decide which method of transport to use?

Moderator: First discuss all rail travel behaviour generally, before focusing on business, commuting or leisure as appropriate to the group.

- When: frequency of rail travel, journey length and usual travelling times
- Where: where from and to
- Who: do they travel on their own or with other people?
- Usual purpose of rail journey: including business, commuting and leisure
- Do they make some journeys regularly and other journeys occasionally?

3. Satisfaction / dissatisfaction with rail travel

(10 MINS)

We are now going to focus on commuting / business / leisure travel (as appropriate)

- Generally how would you describe the experience of making this journey type by rail?
- What do you like about it?
- What do you dislike about it?
- Briefly ask for the main factors that influence satisfaction (without prompting):

4. Value for money specific

(30 MINS)

- Thinking specifically about your last journey, what elements impressed you and what didn't
- Still thinking about your last journey, did you feel that it represented good value for money?
- Reasons for satisfaction / dissatisfaction
- Probe in depth on the impact of the following on value for money:
 - Journey purpose (business, commuting, leisure)
 - Journey type (single v return)
 - Length of journey
 - Time of day / day of week
 - Ticket price
 - Availability of other transport options
 - Total journey cost (e.g. car parking fees)
 - Punctuality and reliability
 - Length of journey time
 - Frequency of trains on that route
 - Room to sit and stand
 - Connections with other train services
 - Availability of staff on the train
 - Staff (helpfulness, pleasantness, knowledge levels, availability etc)
 - Presentation and cleanliness of stations
 - Presentation and cleanliness of trains
 - Managing delays/service disruption
- Does what you see and hear in the media about railways and train fares influence your view (about value for money)?
- How does rail travel compare with other modes of transport in terms of value for money, and why? Probe on:
 - Driving
 - Bus
- How do you determine value for money of these other modes of transport?
- On what basis do you compare them to rail travel (petrol, parking, insurance, tax, travel time)
- Thinking not just about public transport, what product, service or brand do you feel offers you good value for money – and why

5. Ticket purchase and fare systems
--

(25 MINS)

- Satisfaction/dissatisfaction with ticketing (on flip chart)
- What types of tickets are available for rail travel? (note any spontaneous awareness of Fares Simplification, i.e. introduction of Anytime, Off-Peak, Super off-peak and Advance names)

Write on cards: if not mentioned include annual season ticket, monthly season ticket, weekly season ticket, walk-up Anytime Single/Return, walk up Off-Peak Return

For each ticket type, ask:

- Do you ever buy this type of ticket? In what situations? Ask for examples
- Benefits of this ticket type (*probe in depth with season ticket holders*)
- Disadvantages of this ticket type
- Triggers to purchase
- Barriers to purchase (*probe in depth with season ticket holders*)
- Value for money of this ticket type
- Improvements to this ticket type / what would encourage you to purchase
- How do you think train companies decide what to charge?
- Awareness that some ticket types are regulated to RPI + 1% per year? Which ones?

6. Improving value for money satisfaction
--

(10 MINS)

Moderator: Ask respondents to work in pairs to describe the ideal rail journey (commuting, business or leisure as appropriate to the group) in terms of value for money. Explain that the focus is not just on price (i.e. cheap tickets) but what a 'value for money' experience would be like.

What should the journey be like? How would it be different from the journeys you make now? How could facilities / services be improved? What are the most important elements to consider? Respondents to feed back to the group, then discuss:

- Reaction to ideas?
- What are the most important elements of the journey overall?
- What elements increase / decrease sense of value for money?

7. Reaction to specific ideas

(20 MINS)

Moderator: to what extent would the following ideas help improve satisfaction with value for money? Probe on likes / dislikes of each concept

Commuters / season ticket groups:

- Spreading payment over 12 months
 - Interest free?
 - Reasonable charge for credit?
 - Loan from employer?
- Loyalty scheme for season ticket holders
 - Benefits in recognition that you are a loyal customer (e.g. Tesco / M&S vouchers, voucher for the occasional free coffee at a station, cinema tickets etc.)

- Discounts for people who are frequent commuters, but whose travel patterns are irregular and a season ticket isn't suitable (e.g. 10 trips for the price of 8)
- Emphasising the benefits of a season ticket (i.e. 52 weeks for the price of 40)

Commuter / season ticket groups and off-peak groups:

Moderator to explain that existing research suggests that there being “sufficient room for all passengers to sit or stand” is the biggest driver of dissatisfaction with value for money on the railways.

- How often do you stand?
- Do you ever have to wait for the next train because you cannot get on?
- *Unless it has already been extensively covered*, how does this affect how you feel about value for money

Moderator to explain that if extra seats are provided to address the problem somebody has to pay – the extra fares income is unlikely to cover the extra costs.

- Would you pay a higher fare to fund extra carriages so you get a seat?
- If so, how much more? Twice as much? Half as much again? A bit more than the current inflation plus 1% per annum increase.
- If the train frequency was increased (say from hourly to half-hourly), would you pay a bit more?
- If so, how much more?
- Describe a train service that you would be prepared to pay more for?
- If you are not prepared to pay a higher fare, what would you do instead?

Moderator to ask a final, almost philosophical question.

- Should the taxpayer subsidise the extra capacity? Why?
- Does your opinion change if you know that around half the cost of running the Valley Lines network is met by taxpayers already?

8. Summary	(5 MINS)
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- Overall satisfaction with rail travel from value for money perspective?
- What are the three key improvements that would enhance perceptions of value for money?
- If they were responsible for increasing passengers' satisfaction with value for money, what would they do?
- Sentence completion handout:
“For me, a value for money rail journey would be one where....”

THANK RESPONDENTS AND CLOSE

APPENDIX III: QUANTIATIVE QUESTIONNAIRE

Serial No: _____ (1-5)
Card: 01 (6-7)

Q1 OFFICE USE - INTERVIEWER TO ASK BEFORE HANDING OUT QUESTIONNAIRE
(CHECK QUOTAS)
Commuter quota
Is your journey today a regular or occasional commuting journey that you do for your work or studies?

Long distance quota
Is your journey today long distance. By that I mean it will involve travelling 100 miles or more by train from your originating station to your final destination station?

(8)

Commuter 1
Long distance (100+ miles)..... 2

Rail Travel Survey

Thank you for your help with this survey being carried out by Continental Research on behalf of Passenger Focus. Passenger Focus is the official independent consumer organisation representing the interests of rail users nationally. The rail companies, government bodies and passenger groups pay close attention to the results of these surveys and as a result services are often improved. To help Passenger Focus represent the views of rail passengers, we would appreciate a little of your time to complete this questionnaire.

Points to note when completing this questionnaire

- This questionnaire relates only to National Rail journeys. Please exclude journeys using London Underground, metros and trams.
- To answer the questions please tick the box next to the answer(s) that apply or write in your answer in the space provided. Unless the question allows you to tick several answers please just tick one box per question.
- When you have completed your questionnaire please return it to us in the envelope provided.

Section 1: Train details

Q2 You were given this questionnaire at (INSERT STATION). Were you arriving at (INSERT STATION) or departing from it?

(9)

Arriving at (INSERT STATION) 1
..... Goto Q3

Departing from (INSERT STATION) 2
..... Goto Q4

Both arriving and departing (e.g. changing trains) 3
..... Goto Q3

Q3 If you were **arriving or changing trains** at (INSERT STATION) please answer Q3

Please write in the name of the station where you first started this journey today and the time (using the 24 hour clock) the train was scheduled to depart this station where you first started your journey today.

Station name _____ (10-13)

Schedule departure time (use 24 hour clock e.g. 17:25) Hours Mins (14-17)

Q4 If you are **departing or changing trains** from (INSERT STATION) please answer Q4
Please write in the name of your final destination station. Also please write in the time your train is scheduled to depart (using the 24 hour clock) from (INSERT STATION) to your destination station.

Station name _____ (18-21)

Schedule departure time (use 24 hour clock e.g. 17:25) Hours Mins (22-25)

Q5 **All to answer**
How long was/is the **scheduled** rail journey time from the station you boarded to your final destination station?

Hours _____ (26-27)

Minutes _____ (28-29)

Q6 Which train company operates the train for your journey today? If you are using more than one company's trains, please indicate the one you most recently or are just about to use.

- | | |
|------------------------------------|------|
| | (30) |
| Arriva Trains Wales | 1 |
| c2c | 2 |
| Chiltern Railways | 3 |
| Cross Country | 4 |
| East Midlands Trains | 5 |
| First Capital Connect | 6 |
| First Great Western | 7 |
| First ScotRail | 8 |
| First TransPennine Express | 9 |
| | (31) |
| Grand Central | 0 |
| Heathrow Express | 1 |
| Heathrow Connect | 2 |
| Hull Trains | 3 |
| London Overground | 4 |
| London Midland | 5 |
| Merseyrail | 6 |
| National Express East Anglia | 7 |
| National Express East Coast | 8 |
| Northern Rail | 9 |

	(32)
Southern.....	0
South Eastern	1
South West Trains	2
Virgin Trains.....	3
Wrexham and Shropshire	4
Other (WRITE IN).....	5

Q7	How did you buy your ticket for your journey today?	(33)
	In advance - booked over the phone	1
	In advance at station	2
	In advance via travel agent.....	3
	In advance via the internet/ a website.....	4
	On the day of travel at a station ticket office	5
	On the day of travel from a ticket machine	6
	On the day of travel on the train	7
	Using a season ticket	8
	Using an Oyster season ticket.....	9
		(34)
	Using an Oyster Pay as You Go card	0
	Other method of purchase	1
	Ticket was organised for me.....	2

Q8	When did you buy your ticket for your journey today?	(35)
	Today.....	1
	In the last week.....	2
	In the last fortnight.....	3
	In the last month	4
	In the last two months	5
	Not sure.....	6

Q9	If you purchased your ticket today how would you rate the ticket buying facilities you used?	(36)
	Very good.....	1
	Fairly good	2
	Neither good nor poor	3
	Fairly poor	4
	Very poor.....	5
	Not sure.....	6
	Did not purchase ticket today	7

Q10 What type of ticket do you have for your journey today? If you are unsure please look at your ticket as this will give you the name. (37)

First Class Anytime Single/Return	1
First Class Anytime Day Single/return	2
Standard Anytime Single/Return	3
Standard Anytime Day Single/Return	4
First Class Season ticket (weekly) including those with London Travelcard add on	5
First Class Season ticket (monthly) including those with London Travelcard add on	6
First Class Season ticket (annual) including those with London Travelcard add on	7
Standard Season ticket (weekly) including those with London Travelcard add on	8
Standard Season ticket (monthly) including those with London Travelcard add on	9
(38)	
Standard Season ticket (annual) including those with London Travelcard add on	0
London Travelcard season ticket stored on an Oyster card	1
Off-peak Day Single/Return	2
Off-peak Single/Return	3
Super Off-peak Day Single/Return	4
Super Off-peak Single/Return	5
First Class Advance	6
Standard Class Advance	7
One Day Travelcard	8
Oyster Pay as You Go	9
(39)	
Oyster Season ticket	0
A special Promotion ticket	1
Holiday package/ Tour ticket	2
Rail Staff Pass/Privilege ticket/Police concession	3
Group Save ticket	4
Other: please specify	5

Q11 Did you use a railcard to buy your ticket? (40)

Yes - a 16-25 Railcard (formerly young persons)	1
Yes - a Senior Railcard	2
Yes - A Network Railcard	3
Yes - a Friends and Family Railcard (formerly family)	4
Yes - a Disabled Railcard	5
Yes - other type of railcard (please write in)	6
No - did not use a railcard	7

Section 2: Journey Details

Q12	What is the main purpose of your rail journey today?	(41)
	Daily commuting to/from work	1
	Less regular commuting to/from work	2
	Daily commuting for education (to/from college/school/university)	3
	Less regular commuting for education (to/from college/school/university)	4
	On company business (or own or self employed)	5
	Shopping trip	6
	Visiting friends or relatives	7
	Sport/entertainment	8
	A day out	9
		(42)
	Travel to/from holiday	0
	On personal business (job interview, dentist etc)	1
	Other	2

Q13	And were you on the outward or return journey when you were given this questionnaire?	(43)
	Outward	1
	Return	2
	One way trip only	3

Q14	How often do you make the train journey that you are on today when handed this questionnaire?	(44)
	3 or more times a week	1
	Once or twice a week	2
	1 or 2 times a month	3
	Once every 2-3 months	4
	Once every 4 or 5 months	5
	Once every 6 months	6
	Less often	7
	Never/first time today	8

Q15 **If you use this route every 6 months or more frequently please answer Q15 others go to Q18**

	How long have you been using this route on a regular basis?	(45)
	Under 1 year	1
	1 to 4 years	2
	5 to 9 years	3
	10 years or more	4
	Not sure	5

Q16	And when travelling on this route how often are you able to get a seat?	(46)
	Always	1
	Usually.....	2
	About half the time.....	3
	Rarely	4
	Never	5

Q17	Based on your experience of travelling on this route what percentage of your journeys would you say are on time?	(47)
	95% or more are on time	1
	90% to 94% are on time.....	2
	85% to 89% are on time.....	3
	80% to 84% are on time.....	4
	70% to 79% are on time.....	5
	60% to 89% are on time.....	6
	50% to 59% are on time.....	7
	Less than 50% are on time	8
	Not sure	9

Q18 All to answer

Today are you: (tick all that apply)

	Travelling alone	1
	Travelling with children aged 0-4.....	2
	Travelling with children aged 5-10	3
	Travelling with children aged 11-15	4
	Travelling with other adults aged 16+	5

Q19	Was there sufficient room on the train today for you and any luggage or other items you are travelling with?	(49)
	Yes - sufficient room for me and my items	1
	No - insufficient room for me and my items	2

Section 3: Value for Money

Q20	Thinking about the rail journey you are making TODAY, taking everything into account such as the ticket price, comfort, reliability, speed of the journey, frequency of trains would you say these types of national rail journeys represent....	(50)
	Very good value for money.....	1
	Quite good value for money.....	2
	Not very good value for money.....	3
	Not at all good value for money.....	4
	Not sure	5

Q21 Why did you give your rating for value for money for THIS journey? All your comments are extremely important to us? Write in (51-52)

Q22 Thinking about the rail journey you are making TODAY, how valued as a customer did your train company make you feel? (53)

Very valued	1
Quite valued	2
Not very valued	3
Not at all valued	4
Not sure	5

Q23 What do you think would make you more valued as a customer on this route? Please include all your ideas as they are important to us. Write in (54-55)

Q24 Still thinking about value for money from the rail journey you are making TODAY. Please tick the one attribute in each pair shown below that, in your opinion, is the larger contributor to the value for money for the type of journey you are making today.

The following 23 attributes were put into 36 pairs on the final questionnaire used

(56)

Punctuality/reliability of this train	1
The journey is fast and direct	2
Being able to get a seat on the train	3
The train is modern and comfortable	4
The stations used to board and exit are safe and well lit	5
You are kept properly informed of delays or changes to the journey	6
You understand fully all the different prices of tickets available to you when purchasing your ticket	7
The price of the ticket is cheap	8
The buffet car/trolley is well stocked	9

	(57)
Availability and helpfulness of railway staff	0
Power sockets and WIFI are readily available throughout the train	1
There is sufficient space for luggage and other large items.....	2
The types of tickets available for a journey are logical and easy to understand	3
There is a quiet carriage restricting the use of mobiles and other audible electronic items	4
The toilets are clean and in working order.....	5
You can buy a ticket on the train	6
If I travel on a train where my ticket is not valid the price of my current ticket is taken into account in the additional fee charged	7
The temperature of the train is regulated.....	8
Any ticket price increases are linked to the rate of inflation only	9
	(58)
The onboard train staff are visible and available to control any anti-social passenger behaviour	0
The train is not overcrowded	1
The train is clean	2
There is room to work/use a laptop	3

Q25 Still thinking about value for money from the rail journey you are taking TODAY. Here are some more pairs, please tick the one attribute in each pair shown below that, in your opinion, is the larger contributor to the value for money for the type of journey you are making today.

Please tick one comment for each pair shown below

	(59)
Punctuality/reliability of this train	1
The journey is fast and direct	2
Being able to get a seat on the train	3
The train is modern and comfortable	4
The stations used to board and exit are safe and well lit	5
You are kept properly informed of delays or changes to the journey	6
You understand fully all the different prices of tickets available to you when purchasing your ticket	7
The price of the ticket is cheap.....	8
The buffet car/trolley is well stocked	9
	(60)
Availability and helpfulness of railway staff	0
Power sockets and WIFI are readily available throughout the train	1
There is sufficient space for luggage and other large items.....	2
The types of tickets available for a journey are logical and easy to understand	3
There is a quiet carriage restricting the use of mobiles and other audible electronic items	4
The toilets are clean and in working order.....	5
You can buy a ticket on the train	6
If I travel on a train I am not supposed to the price of my original ticket is taken into account in the additional fee charged	7
The temperature of the train is regulated.....	8
Any ticket price increases are linked to the rate of inflation only	9
	(61)
The onboard train staff are visible and available to control any anti-social passenger behaviour	0
The train is not overcrowded	1
The train is clean	2
There is room to work/use a laptop	3

Q26 Still thinking about the journey you are taking TODAY and taking into account total journey costs do you think rail provides better or worse value for money than if you did this journey by each of these methods?

		Rail is much better value	Rail is slightly better value	Rail is slightly worse value	Rail is a lot worse value	Unsure	Not relevant to this journey
Car	(62)	1	2	3	4	5	6
Long distance Coach	(63)	1	2	3	4	5	6
Air	(64)	1	2	3	4	5	6
Local bus	(65)	1	2	3	4	5	6
London Underground	(66)	1	2	3	4	5	6

Q27 If you regularly use the train for commuting purposes please answer Q27 and Q28 otherwise go to Q29

Were you aware of the following points concerning an annual season ticket?

		Yes	No	Not sure
It allows 52 weeks travel for the price of 40 weeks?	(67)	1	2	3
If part way through the year your circumstances change and you have no need for your annual ticket you can get a refund for the portion of time left to run on your ticket?	(68)	1	2	3
If you lose your annual season ticket you are usually able to get a replacement on the first occasion it happens.	(69)	1	2	3

Q28 Here are some ideas that might improve commuter satisfaction with value for money. How appealing are each of these ideas to you personally?

		Very appealing	Quite appealing	Not very appealing	Not at all appealing	Not sure/not relevant
Regular commuters receive supermarket shopping vouchers for their loyalty	(70)	1	2	3	4	5
Regular commuters receive a certain number of free teas/coffees at the	(71)	1	2	3	4	5

station for their loyalty						
Discounts are available for those commuters whose travel patterns are irregular and for whom a season ticket is not appropriate (e.g. 10 trips for the price of 8)	(72)	1	2	3	4	5
Regular commuters would get a third off all other off peak fares in your region if you hold a 12 month season ticket	(73)	1	2	3	4	5
An annual season ticket could be paid for in 12 instalments	(74)	1	2	3	4	5

Q29 If you use the train for long distance trips please answer Q29 otherwise go to Q31

Here are some ideas that might improve satisfaction with value for money amongst long-distance passengers. How appealing are each of these ideas to you personally?

		Very appealing	Quite appealing	Not very appealing	Not at all appealing	Not sure/not relevant
If you travel regularly you earn rail miles that can be put towards the cost of future rail journeys	(75)	1	2	3	4	5
If you get on a train where your ticket is not valid allowing what you have already paid to count towards a new ticket (at present with Advance Single tickets if you miss the train on which you are booked you have to buy a brand new often full price ticket).	(76)	1	2	3	4	5

Q30 All to answer

Which one of these options represents better value for money?

- (77)
- A ticket where you can travel to London after 0930 and you can travel back up to 1630 or from 1900 hours 1
- Or a ticket where you cannot travel to London before 0930 and you cannot travel back between 1630 and 1900 hours 2
- Value for money would be the same..... 3
- Not sure 4

Section 4: About you.

In order to ensure that the responses of all groups of passengers are included please could you provide the following details about yourself.

Q31	Are you?	(78)
	Working full time (30+ hours).....	1
	Working part time (9-29 hours).....	2
	Not working - seeking work.....	3
	Not working and not seeking work	4
	Retired	5
	Full time student	6
	Other.....	7

Q32	Which of the following best describes the occupation of the Chief Wage Earner in your household?	(79)
	Professional/Senior Managerial	1
	Middle managerial	2
	Junior managerial/clerical/supervisory	3
	Skilled Manual (with professional qualifications/served and apprenticeship)	4
	Unskilled Manual (no qualifications/not served an apprenticeship).....	5
	Full time student	6
	Retired	7
	Unemployed/between jobs	8
	Housewife/Househusband	9
	Other (write in)	(80) 0

Q33	Which age group do you fall into?	card: 02	(6-7)
	Under 16.....		(8) 1
	16 to 25		2
	26 to 34		3
	35 to 44		4
	45 to 54		5
	55 to 59		6
	60 to 64		7
	65+		8

Q34	Are you....	(9)
	Male	1
	Female	2

Q35	Which of the following best describes your ethnic background?	(10)
	White	1
	Mixed	2
	Black or Black British.....	3
	Chinese	4
	Asian or Asian British	5
	Other ethnic group (write in)	6

Q36	Do you have a disability or long term illness related to the following: (tick all that apply)	(11)
	Mobility	1
	Wheelchair use	2
	Hearing.....	3
	Eyesight.....	4
	Speech impairment	5
	Learning difficulties.....	6
	No: none.....	7

Thank you for your help completing this questionnaire. Please return it in the envelope provided or use the following Freepost address.

**Passenger Experience Survey
Continental Research
Freepost (KE7902)
LONDON EC1B 1TX**

This survey is being undertaken for Passenger Focus by Continental Research, an independent market research agency based in London. You were handed the questionnaire by an interviewer working for Continental Research.

The results from the survey are used by Passenger Focus to take passengers' views into account when representing rail travellers. In addition the data will be provided to the Department for Transport and a range of organisations to help them assess the performance of the train operating companies. To find out more about how the information is used please visit www.passengerfocus.org.uk.

All the answers you provide are entirely confidential and will be combined with those of many other passengers to produce overall figures of performance.

If you have any questions about this survey, please feel free to contact Colin Shaddick at Continental Research on 020 7490 9103. If you have any concerns about the bona fides of the survey itself, you can contact the Market Research Society on 0500 396999 who will verify our status as a legitimate market research organisation.