

# Passenger Requirements of Rail Fares

## Quantitative Research Report

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## A. Introduction

The broad objective of this research, therefore, is to find out how passengers view current fare levels and ticketing structures.

An initial qualitative phase of research has already been completed and reported on separately (April 2006). This report presents the results of the subsequent quantitative stage.

The quantitative research involved the distribution of 7,500 self completion questionnaires at 45 train stations across the UK. Questionnaires were handed out, along with reply paid envelopes, to commuters, business travellers and leisure travellers. The distribution of questionnaires took place from 24<sup>th</sup> April to 6<sup>th</sup> May 2006.

## B. Management Summary of Research Findings

- For commuters and leisure rail passengers the main consideration when choosing a ticket is cost. Beyond this, commuters are looking for some degree of flexibility. Business passengers are the least likely to have a choice of tickets available but when they are offered this choice they are likely to consider both cost and flexibility issues.
- Despite the importance of cost as a consideration however, only a limited amount of searching for the best priced ticket actually takes place.
- The vast majority of leisure and business travellers are aware that they are making the journey well before the actual day of travel. Nevertheless, most wait until the day of travel to buy their ticket.
- Triggers to advance purchase include access to lower priced tickets, avoiding queues and reserving seats – in essence, reducing hassle on the day of travel.
- On average passengers believe they can book tickets 7-8 weeks in advance but would ideally like to be able to book 12-13 weeks before the day of travel.
- Most of those who buy their ticket on the day of travel are unaware of whether or not the ticket would be cheaper if bought in advance and most claim they would be likely to buy in advance if they knew the ticket would be cheaper.
- In line with National Passenger Survey, leisure passengers are generally more satisfied with value for money of tickets than are commuters or business travellers.
- Sources of ticket purchase that are most trusted to provide best value for money tickets are ticket offices at stations, staff on trains and the internet. Least trusted sources are ticket machines and travel agents.
- Only a small minority of rail passengers are of the view that rail tickets are fairly priced and less than half claim to understand the range of tickets and fares available.
- The vast majority of passengers would travel more frequently if rail fares were cheaper. Indeed almost three quarters of leisure passengers have decided not to travel by train due to the cost of tickets, preferring typically to travel by car instead.
- Whilst most commuters recognise that season tickets represent better value for money than dailies, they hugely underestimate the

number of effectively 'free' weeks travel offered by annual season tickets.

- 'Irregular travel patterns' is the main barrier to purchase of season tickets amongst regular commuters who buy their tickets daily. Cost is a secondary barrier overall, but the key reason for around a quarter of these passengers.
- Slightly under a fifth of non season ticket holders who commute regularly would be very likely to buy a season ticket if they could spread the payment interest free over 12 months.
- The 10 ticket carnet concept was also well received by these commuters (83% very or fairly interested).
- A 20% reduction in fares has some potential to encourage rush hour commuters to shift travel times in order to avoid the busiest periods
- The majority of leisure and business passengers are aware of the existence of the Saver ticket and, on balance, they tend not to be in favour of TOCs setting the prices for these tickets.
- There is healthy interest in the concept of the £30 National Railcard – particularly amongst leisure passengers.

## Conclusions

- **Many of the key findings from the previous qualitative phase have been confirmed by this research.**
- **In particular there is a general feeling amongst rail passengers that rail fares are unfairly priced and that the fares structure is difficult to understand.**
- **The research strongly indicates that ticket prices are currently acting as a barrier to train travel. Many passengers have decided against travelling by train due to ticket prices and the vast majority of leisure and business passengers claim they would travel more frequently by train if prices were reduced.**
- **The research also confirms, however, that passengers lack sufficient knowledge to enable or encourage them to access more favourable ticket options when they are available. A high proportion of those who buy tickets on the day of travel, for instance, do not know if their ticket would have been cheaper had it been booked in advance. Additionally, regular commuters who buy tickets on a daily basis grossly underestimate the number of effectively 'free' weeks travel that are offered by season tickets.**

- **These findings indicate an immediate requirement for informing rail passengers on how to get the best value for money tickets for the type of journey they are undertaking. Beyond this there is an ultimate need for simplification of the fares and ticketing structure and the possible introduction of initiatives, such as the National Railcard or interest free season ticket payment plans, designed to increase the affordability of rail travel for some segments.**

# 1. Research Context and Objectives

The level of fares paid by passengers to make journeys by rail has been controversial for some time. Passenger Focus has amassed a substantial amount of evidence and knowledge on the types of fare offered historically and the rate of fare increases over time and is aware that many passengers are not satisfied with the value for money offered by the ticket purchased. The National Passenger Survey which surveys 50,000 passenger journeys each year has indicated low levels of satisfaction 'with the value for money for price of ticket' since the survey was introduced in autumn 1999. In spring 2006 only 41% of passengers were very or fairly satisfied with this measure. Satisfaction was lowest in the London and South East with 35% satisfied and highest in the regions with 57% satisfied. 53% of long distance passengers were satisfied.

On some long-distance journeys the absolute fare can appear extraordinarily high such as a £202 Return from London to Manchester in the weekday AM peak standard class or £311 first class. However train operating companies point to the availability of very low - priced tickets available for those passengers who are able to be flexible with their travel plans and to book in advance.

Whilst much of the public debate on rail fares in the media tends to focus on long-distance journeys, the majority of passengers are currently using rail for shorter commuting and leisure journeys. Commuters often have little choice around when they travel and therefore have to travel in the weekday peaks. Leisure travellers on short journeys cannot book discounted tickets in advance (because such tickets do not exist unlike in the long distance sector) and therefore are subject to 'turn up and go' fares. However a number of passengers are eligible for Railcards that provide a discount on the majority of fares for journeys outside of the morning peak, these include Family, Young Persons, Senior and Disabled railcards.

A paired preference survey carried out in spring 2005 for the Strategic Rail Authority identified 'value for money for price of ticket' as the second highest priority for improvement out of 30 individual service aspects. Only punctuality / reliability was a higher priority. This was the case for commuters, leisure and business travellers.

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The overall objective of this research is to inform Passenger Focus' knowledge, evidence, policy and lobbying around passengers requirements from rail fares in Great Britain and to provide understanding in terms of:

- awareness and views on existing ticket ranges – in particular where these appear to offer real choice vs. where they are thought simply to be confusing/complex
  - awareness of quotas on cheaper long-distance fares amongst relevant target groups
  - satisfaction with availability of cheaper long-distance fares and level of discount
- passenger experience of ticket purchase in terms of how the ticket was purchased, timing (planned vs. not) and information on fares obtained
- awareness and views on current 'turn-up-and-go' fares (including Saver ticket) and the fact that these are regulated by the government (and whether they should be)
  - views on potential withdrawal of Saver ticket
- triggers & barriers for commuters to travelling outside peak hours
  - how could they be incentivised to generate behaviour changes
- the impact of current fares and ticketing on socially excluded groups
  - including Railcard discount holders, and lower income groups who are not eligible for existing railcards
- requirements for booking in advance: ideal number of weeks in advance when tickets should become available; considerations and key requirements.

As we have mentioned above, this report covers the quantitative element of this two phase research study.

## 2. Sample & Methodology

The methodology used was that of self completion questionnaires. A total of 7,500 questionnaires were distributed evenly across the three main quota groups – commuters, leisure travellers, business travellers. Rail passengers were asked to complete the questionnaire in relation to the journey they were about to undertake or had just completed. 45 sampling points (train stations) were chosen to provide a good spread throughout the UK (see appendix for locations).

A total of 2,686 completed questionnaires were returned (36% of total distributed) although a number of respondents had taken a questionnaire related to a specific journey purpose (commuter, leisure, or business) and had claimed within the questionnaire to have made a different type of journey. We have excluded these respondents from the analysis as a result of this inconsistency and the fact that we can not be sure of the type of journey they had actually undertaken.

The final sample, based on 2,122 matched (questionnaire taken matches claimed journey purpose) responses is therefore as follows:

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**Sample Demographics - Table 1**

		<b>Commuters</b>	<b>Leisure</b>	<b>Business</b>
		<b>%</b>	<b>%</b>	<b>%</b>
<b>Gender</b>	<b>Male</b>	44	34	61
	<b>Female</b>	56	64	39
	<b>Not stated</b>	-	2	-
<b>Age</b>	<b>16-25</b>	26	14	5
	<b>26-44</b>	43	24	43
	<b>45-59</b>	29	27	45
	<b>60plus</b>	3	33	7
	<b>Not stated</b>	-	2	-
<b>Region</b>	<b>London/SE</b>	46	34	34
	<b>South West</b>	16	15	15
	<b>Mids/Wales</b>	16	20	19
	<b>North</b>	18	20	24
	<b>Scotland</b>	4	8	7
	<b>Not stated</b>	-	3	1
<b>Household Income</b>	<b>Under £30k</b>	38	57	19
	<b>£30k to £50k</b>	26	16	28
	<b>Over £50k</b>	25	9	42
	<b>Not stated</b>	12	19	12
<b>Party</b>	<b>Alone</b>	93	66	86
	<b>With others</b>	7	34	14
<b>Ticket</b>	<b>Standard Single/Return</b>	24	28	47
	<b>Cheap Day Single/Return</b>	8	22	10
	<b>Saver or Super Saver</b>	5	14	13
	<b>Standard Monthly Season</b>	21	-	-
	<b>Standard Annual Season</b>	15	-	-
	<b>Other*</b>	27	36	30
<b>Base</b>		<b>719</b>	<b>760</b>	<b>643</b>

\*Others includes; First Class Single/Return, Apex/Super Apex, Standard Weekly Season, One-Day Travelcard

- Commuters were undertaking a regular journey to or from either a place of work or a place of study

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- Leisure travellers were visiting friends or relatives, on a shopping trip, on personal business (e.g. job interview, dentist etc.), on a day out, or travelling for another predominantly leisure reason
- Business travellers were on company business (or own if self employed)

Distribution of the questionnaires took place from 24<sup>th</sup> April to 6<sup>th</sup> May 2006. Questionnaires returned up to 31<sup>st</sup> May 2006 are included in the analysis.

## 3. Main Findings

### 3.1 Ticket Purchase

#### 3.1.1 Source of Ticket Purchase

*“How was your ticket purchased” - Table 2*

	<b>Commuters %</b>	<b>Leisure %</b>	<b>Business %</b>
Window at train station	70	62	55
Ticket machine at station	11	6	8
On train	5	5	4
Internet	3	<b>9</b>	<b>11</b>
Phone	2	4	5
Bought for me	4	4	<b>9</b>
Other	4	3	6
Not stated	1	6	1
<i>“Whether used railcard”</i>			
Yes	17	32	10
No	76	58	83
Don't know	7	10	7
Base	719	760	643

The majority of all passengers had purchased their ticket from the train station ticket window.

Commuters were the most likely of the three groups to buy from the ticket window and commuters travelling with season tickets were particularly likely to have used this facility (83%). A total of 11% of commuters had bought their ticket from a machine and this option was most popular amongst the younger age group (16-25s – 17%) and those travelling with standard Singles>Returns (19%) or One-Day Travelcards (20%).

Whilst only 3% of commuters used the internet when purchasing their tickets the proportion of leisure and business travellers doing so was much higher (9% and 11% respectively). The types of tickets that were more likely than average to be purchased on the internet were Savers

(leisure – 17% and business – 20%) and 1<sup>st</sup> Class tickets for business (16%). The internet was also more likely to be used for advance purchase (more than a week in advance of travel) and for longer journeys (two hours plus).

Ticket machines at train stations were more likely to be used by commuters than by leisure or business travellers, and amongst commuters by those who were travelling with standard or Cheap Day Singles and Returns.

Railcard usage was highest amongst leisure travellers. The most popular type of railcard amongst the leisure segment was the Senior Railcard, used by 17%. The bulk of the remainder of railcard users had a Young Persons Railcard and this was particularly true for the commuter group.

### 3.1.2 Triggers to Ticket Purchase

*“Why chose ticket type” - Table 3*

	<b>Commuters</b>	<b>Leisure</b>	<b>Business</b>
	%	%	%
Cheapest	55	60	36
Only one offered or available	21	17	26
Needed flexibility	25	12	23
Someone else chose	1	2	9
Advised by train staff	3	5	6
Quickest route	3	4	5
Other	14	9	8
Base	719	760	643

Note: respondents could choose more than one trigger

Cost was the main trigger to purchase overall and was particularly dominant amongst commuters and leisure travellers. Those purchasing Apex, Savers and Cheap Day Returns were highly likely to have been influenced by the cost of the tickets.

The need for flexibility was also a major consideration, primarily for commuters and business travellers, and was likely to lead to the purchase of 1st Class tickets, season tickets and One-Day Travelcards.

In each of the key segments, a fairly high proportion had purchased the only ticket that was offered or available. Standard Singles and Returns were the tickets most likely to be purchased in these circumstances.

Despite the fact that cost was the key trigger to purchase there was, as the following table illustrates, only a limited amount of searching around for the best priced ticket.

***“Extent looked around for the best priced ticket” - Table 4***

	<b>Commuters</b>	<b>Leisure</b>	<b>Business</b>
	%	%	%
Looked extensively	15	11	8
Looked a bit	15	19	16
Didn't look around	24	32	43
Not relevant/no options	43	30	19
Don't know	2	7	14
Base	719	760	643

Overall, business travellers were the least likely of the three groups to have looked around to find the best price for their ticket.

In each of the above segments it was the passengers who were travelling on the longer journeys who were most likely to have looked around extensively for the best priced ticket. Also, and not altogether surprisingly, those who purchased their ticket in advance were more likely to look around than were those who bought on the day.

Amongst the commuters, there was a high proportion who were of the view that they had no options with regard to ticket prices. This was particularly true for those in London/SE and for those whose commute was less than an hour each way.

### **3.1.3 Timing of Ticket Purchase**

Leisure and business travellers were asked about the timing of the actual ticket purchase in relation to when they knew they were going to be making the journey.

***“When knew about making this journey” - Table 5***

	<b>Leisure %</b>	<b>Business %</b>
Today	17	6
In last week	39	45
1-2 weeks ago	13	25
3-4 weeks ago	14	14
Longer	16	10
Don't Know	1	-
<i>“When purchased ticket”</i>		
Today	54	56
In last week	18	27
1-2 weeks ago	9	8
3-4 weeks ago	6	4
Longer	7	2
Don't Know	6	2
Base	760	643

The vast majority of leisure and business passengers were aware well before the day of travel that they were to be making the journey. Despite this, over half waited until the day of travel to buy their ticket.

Business passengers were particularly likely to leave it until the last moment before buying their ticket. Indeed, four in ten business passengers buying their ticket on the day of travel had known about the journey for a week or more. The equivalent figure for leisure passengers was 23%.

Those purchasing their ticket on the day of travel were asked whether or not this ticket would have been cheaper had they bought it in advance.

***“Would ticket have been cheaper if purchased before today” - Table 6***

	<b>Leisure %</b>	<b>Business %</b>
Yes	6	11
No	42	28
Don't Know	52	62
Base (bought ticket today)	412	363

Whilst a small minority of both groups of passengers admitted that their ticket would indeed have been cheaper had they purchased it in advance, the majority were either of the view that there would have been no price advantage to advance purchase or else they were unaware either way.

Those who did not know if their ticket would have been cheaper if booked in advance were asked whether or not they would have bought the ticket earlier if they had known that it would have been significantly cheaper.

***“Likelihood of purchasing in advance if knew would have been significantly cheaper” - Table 7***

	<b>Leisure %</b>	<b>Business %</b>
Very likely	41	26
Fairly likely	23	24
Neither	10	12
Fairly unlikely	9	16
Very unlikely	11	14
Don't Know	5	7
Base (all who don't know if ticket would have been cheaper)	184	219

This table indicates that greater levels of awareness of the price advantage of early booking would be likely to lead to a shift in behaviour for both leisure and business travellers. Over half of those who were unsure if their ticket would have been cheaper claimed that they would have purchased it in advance had they known of a price advantage.

## 3.2 Value for Money

In line with the National Passenger Survey (NPS) the leisure passengers were generally more satisfied with the value for money of the price of their ticket than were the commuters or those travelling for business purposes.

***“Overall, how satisfied are you with the value for money of the price of the ticket you are travelling with today” - Table 8***

	<b>Commuters %</b>	<b>Leisure %</b>	<b>Business %</b>
Very satisfied	10	36	20
Fairly satisfied	30	32	31
Neither	24	14	25
Fairly dissatisfied	21	10	14
Very dissatisfied	13	5	6
Don't know	1	5	3
Base	719	760	643

***Commuter Satisfaction with Value for Money by Ticket Type - Table 8a***

	<b>Standard Single or Return %</b>	<b>Standard Season %</b>	<b>Saver or Super Saver %</b>	<b>Cheap Day Single or Return %</b>
Very satisfied	9	6	8	9
Fairly satisfied	27	29	49	44
Neither	22	25	23	30
Fairly dissatisfied	23	28	10	6
Very dissatisfied	19	12	10	11
Don't know	-	-	-	-
Base	172	327	39	54

**Leisure Traveller Satisfaction with Value for Money by Ticket Type - Table 8b**

	Standard Single or Return %	Saver or Super Saver %	Apex or Super Apex %	Cheap Day Single or Return %
Very satisfied	26	28	40	34
Fairly satisfied	31	35	40	42
Neither	17	18	17	16
Fairly dissatisfied	16	10	-	6
Very dissatisfied	8	9	3	1
Don't know	2	-	-	1
Base	216	109	30	170

**Business Traveller Satisfaction with Value for Money by Ticket Type - Table 8c**

	Standard Single or Return %	1 <sup>st</sup> Class Single or Return %	Saver or Super Saver %	Cheap Day Single or Return %
Very satisfied	15	26	17	34
Fairly satisfied	31	24	43	34
Neither	30	20	24	22
Fairly dissatisfied	16	19	8	6
Very dissatisfied	6	8	4	2
Don't know	3	4	4	2
Base	305	80	83	64

Although the relative satisfaction levels by segment above reflect the results from National Passenger Survey, the absolute very/fairly satisfied figures are higher here (by approximately 10% for each segment). This difference is largely due to the respective sample profiles and the fact that the National Passenger Survey features a higher proportion of London/SE residents (in line with their contribution to total passenger journeys to the rail network) who are generally more negative than others on the subject of value for money of train tickets.

Amongst commuters, the most satisfied groups were those living in Midlands/Wales/East or in Scotland, those who bought their ticket using a railcard and those who were travelling on Cheap Day Singles>Returns. In addition to residents of London/SE, others who were less satisfied than average included 16-25 year olds and those who travelled with standard season tickets or standard Singles>Returns.

Leisure passengers were the most satisfied segment on the whole but there were, nevertheless, some fairly significant differences across the sub groups within this sample. Older respondents (60 plus) were, for instance, much more satisfied with the value for money of the price of their ticket than were 16-25 year olds. Similarly there was higher satisfaction amongst those travelling on Cheap Day Returns and Apex tickets than there was amongst those with standard tickets. In terms of the regions, London/SE was again the least satisfied in contrast to the North of England where 78% of leisure travellers were either very or fairly satisfied. Those who had booked their ticket in advance were generally more satisfied than were those who had bought tickets on the day of travel.

The business traveller sub group results were broadly in line with the sub group results for the leisure travellers. Thus, higher levels of satisfaction were seen amongst over 60's, those from the North and Scotland, those booking in advance and travelling with Saver tickets, Apex tickets or Cheap Day Returns. Less satisfied were younger age groups, London/SE and South West and those who purchased their ticket (typically standard Single/Return) on the day of travel.

### 3.3 Attitudes to Rail Fares

Rail passengers were invited to indicate their level of agreement with a number of statements relating to rail fares.

***Agreement with Statement "Rail tickets are generally fairly priced"***  
**- Table 9**

	<b>Commuters</b> %	<b>Leisure</b> %	<b>Business</b> %
Agree strongly	2	3	1
Agree	13	23	17
Neither	20	23	21
Disagree	38	34	41

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Disagree strongly	25	17	19
Don't Know	2	-	-
Base	719	673	604

Only a small minority of rail passengers are of the view that rail tickets are fairly priced. The majority either disagree with this or are unable to give a view either way. Leisure passengers are very slightly more positive than other segments and commuters, on the whole, are the most negative.

***Agreement with Statement "I am confident of being able to find the best value ticket for my journeys" - Table 10***

	<b>Commuters</b>	<b>Leisure</b>	<b>Business</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Agree strongly	7	8	4
Agree	43	40	32
Neither	16	21	24
Disagree	18	21	31
Disagree strongly	12	9	9
Don't Know	4	-	-
Base	719	673	604

Approximately half of commuters and leisure travellers feel confident of being able to find the best value tickets for the journeys they make. Business passengers are generally less confident of being able to do this.

***Agreement with Statement "I understand the range of tickets and fares available" - Table 11***

	<b>Leisure</b>	<b>Business</b>
	<b>%</b>	<b>%</b>
Agree strongly	5	4
Agree	39	30
Neither	15	15
Disagree	27	31
Disagree strongly	14	20
Don't Know	-	-
Base	661	609

A minority of leisure and business travellers claim to understand the range of tickets and fares available. Highest levels of claimed understanding are seen amongst younger passengers (16-25) and

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those from Midlands/Wales/East and the North of England. Passengers in London/SE, particularly those travelling on business, are unlikely to agree with the statement.

**Agreement with statement “I would travel more on trains if the fares were a bit cheaper” - Table 12**

	<b>Leisure %</b>	<b>Business %</b>
Agree strongly	47	35
Agree	34	37
Neither	11	14
Disagree	7	12
Disagree strongly	2	2
Don't Know	-	-
Base	697	616

Over 80% of leisure passengers and almost three quarters of business passengers would travel more on the trains if the fares were a bit cheaper. Younger passengers in particular are likely to increase usage in response to reductions in train fares.

**Agreement with statement “I don't mind booking early in order to get cheaper fares” - Table 13**

	<b>Leisure %</b>	<b>Business %</b>
Agree strongly	36	21
Agree	45	48
Neither	9	17
Disagree	7	11
Disagree strongly	3	3
Don't Know	-	-
Base	698	616

Eight out of ten leisure passengers and seven out of ten business passengers are happy to book early in order to access cheaper fares.

**Agreement with statement “There should be a standard price for a journey regardless of when you buy the ticket” - Table 14**

	Leisure %	Business %
Agree strongly	24	17
Agree	27	29
Neither	19	20
Disagree	23	26
Disagree strongly	6	8
Don't Know	-	-
Base	698	622

Whilst passengers are more likely to agree than disagree that there should be standard prices for journeys (regardless of when the ticket is booked) there is no strong consensus on this issue.

**Agreement with statement “I am confident of being able to find the cheapest tickets for the journey that I make” - Table 15**

	Leisure %	Business %
Agree strongly	10	8
Agree	38	28
Neither	21	24
Disagree	24	31
Disagree strongly	8	10
Don't Know	-	-
Base	674	605

Again there is something of a split on this issue although leisure passengers are generally a bit more confident of finding the cheapest fares than are the business travellers.

### 3.4 Trust in Sources of Ticket Purchase

Rail passengers were asked to indicate the extent to which they would trust ticket sources to provide them with the best value for money tickets for train journeys. As the following table shows, levels of trust in ticket sources varies quite considerably.

**Trust in Ticket Sources - Table 16**

<b>Ticket office at train station</b>	<b>Commuters %</b>	<b>Leisure %</b>	<b>Business %</b>
Trust entirely	34	42	34
Tend to trust	53	46	48
Neither	8	7	10
Tend to distrust	4	4	7
Distrust entirely	1	1	2
<b>Ticket machine at train station</b>			
Trust entirely	12	8	7
Tend to trust	36	28	27
Neither	28	35	33
Tend to distrust	21	24	27
Distrust entirely	3	6	6
<b>Internet</b>			
Trust entirely	12	13	17
Tend to trust	45	42	51
Neither	27	26	20
Tend to distrust	14	14	9
Distrust entirely	2	5	3
<b>Telephone</b>			
Trust entirely	6	10	10
Tend to trust	39	36	44
Neither	34	29	28
Tend to distrust	18	20	15
Distrust entirely	3	5	3
<b>Staff on train</b>			
Trust entirely	20	24	21
Tend to trust	46	44	37
Neither	20	21	24
Tend to distrust	11	8	12
Distrust entirely	2	3	6
<b>Travel agent</b>			
Trust entirely	6	9	7
Tend to trust	26	33	31
Neither	46	37	39
Tend to distrust	17	16	19
Distrust entirely	4	5	4
Base (all responding)	702	673	625

Views are fairly consistent across the three passenger segments. All segments display a fairly high level of trust in ticket office at train stations and this emerges as the most trusted source of value for money tickets.

Staff on trains and the internet are similarly rated sources although the former is more trusted by commuters and leisure travellers and the latter, more by business travellers.

The telephone is the next most trusted source overall and is slightly more positively viewed by the business segment than it is by others.

Ticket machines at train stations tend to polarise opinions amongst leisure and business travellers but are generally trusted by commuters.

Travel agents is the source least likely to be trusted by commuters to provide best value for money tickets.

### 3.5 Advance Booking

Leisure and business travellers are split on the issue of advance booking but generally prefer to do this rather than buy tickets on the day of travel.

***“Do you generally prefer to buy tickets on the day of travel or to buy them in advance of this” - Table 17***

	<b>Leisure %</b>	<b>Business %</b>
On the day	36	38
In advance	45	45
No preference	16	16
Don't Know	3	1
Base	760	643

Particularly likely to prefer to book in advance are those whose journeys are longer than two hours in duration.

Whilst cost emerges as the main trigger to advance purchase – particularly for leisure travellers - a number of other considerations also contribute quite significantly to this preference.

***“Why do you prefer to buy tickets in advance” - Table 18***

	<b>Leisure %</b>	<b>Business %</b>
Cheaper	80	66
Don't have to queue	64	64
Can reserve seat	56	59
Don't have to think about it on day of travel	55	48
Need to make plans in advance	42	48
<b>Base (all prefer advance)</b>	<b>342</b>	<b>291</b>

Note: respondents could choose more than one reason

Those who prefer to book tickets in advance are clearly motivated by cost savings but are also keen to reserve seats and avoid queues at ticket offices on the day of travel. In general It would appear that passengers who prefer to book in advance are looking to reduce worries and hassle on the day of travel and, in doing so, enhance the overall journey experience.

Despite expressing a preference for advance booking, there is mixed awareness, amongst this group, of precisely how far in advance of travel that tickets can be booked.

***“How far in advance can you book long distance train tickets” - Table 19***

	<b>Leisure %</b>	<b>Business %</b>
Up to a week	10	8
1-2 weeks	8	7
3-4 weeks	24	22
1-2 months	19	19
2-3 months	16	23
3-4 months	6	7
Longer	7	8
Don't know	11	8
<b>Average (months)</b>	<b>1.74</b>	<b>2.04</b>

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Base (all prefer advance)	342	291
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On average, rail passengers who prefer to book tickets in advance believe that tickets can be purchased a maximum of 7-8 weeks before the day of travel. Whilst this is not too far from the truth, the average hides the fact that a fairly high proportion of those who prefer to book in advance - business and leisure travellers alike - are of the view that tickets can be bought a maximum of 4 weeks before the journey. At the other end of the scale, around one in eight think that tickets can be purchased more than 12 weeks in advance.

Although the bulk of passengers who prefer to book in advance are clearly unaware of the maximum lead time for ticket booking, the following table suggests that the majority would like to see this period extended.

***“How far in advance should you be able to book long distance train tickets” - Table 20***

	<b>Leisure %</b>	<b>Business %</b>
Up to a week	6	6
1-2 weeks	5	4
3-4 weeks	12	12
1-2 months	15	12
2-3 months	18	19
3-4 months	8	12
Longer	23	26
Don't know	12	10
<b>Average (months)</b>	<b>3.08</b>	<b>3.32</b>
Base (all prefer advance)	342	291

On average, passengers would like to be able to book their tickets 12 to 13 weeks in advance of travel. Further, a quarter of business and leisure travellers believe that tickets should be bookable more than 16 weeks in advance.

### 3.6 Impact of Ticket Prices on Decision to Travel

There is little doubt, as the following table illustrates, that the cost of tickets has acted as a barrier to travelling on trains for leisure journeys.

***“Ever decided not to travel by train because of cost of ticket” - Table 21***

	Leisure %
Yes - a number of times	41
Yes – once or twice	29
No	28
Base	760

Almost three quarters of leisure travellers have decided not to travel by train due to the cost of the ticket. Furthermore, four out of ten have made this decision on a number of occasions.

Journeys that could have been made by train were typically undertaken by car.

***“What did you end up doing last time that happened” - Table 22***

	Leisure %
Travelled by car	44
Travelled by coach	19
Did not make journey	16
Travelled by bus	10
Travelled by plane	6
Base (all who have decided not to use train because of cost)	531

Coaches, buses and planes were also used as alternatives to rail travel although, in a significant minority of cases, travellers simply decided not to make the journey after all.

### 3.7 Season Tickets

Commuters were asked about the value for money offered by season tickets in relation to tickets bought on a daily basis.

**Agreement with Statements About Season Tickets - Table 23**

<i>"Weekly season tickets offer better vfm than daily tickets"</i>	<b>Commuters %</b>
Agree strongly	17
Agree	52
Neither	8
Disagree	5
Disagree strongly	3
Don't Know	14
<i>"Monthly season tickets offer better vfm than daily tickets"</i>	
Agree strongly	20
Agree	53
Neither	8
Disagree	4
Disagree strongly	3
Don't Know	13
<i>"Annual season tickets offer better vfm than daily tickets"</i>	
Agree strongly	23
Agree	44
Neither	10
Disagree	4
Disagree strongly	2
Don't Know	17
Base	719

The majority of commuters recognise that season tickets (weekly, monthly and annual) represent better value for money than daily tickets. There is, nevertheless, a significant difference in views depending on type of ticket used. Those who already travel with a season ticket are more likely to agree that seasons offer greater value than daily tickets than are those who buy a standard ticket on a daily basis. By way of

illustration, 56% of standard Single/Return purchasers are of the view that annual season tickets represent better value than daily tickets, whilst the equivalent figure for those who already travel with a season ticket is 82%.

In order to further understand levels of awareness of the value for money offered by season tickets, we also asked commuters how many effectively 'free' weeks of travel were provided by an annual season ticket.

***Weeks of 'free' travel offered by annual season ticket - Table 24***

	%
None	8
1-2 weeks	16
3-4 weeks	18
5-7 weeks	8
8-10 weeks	6
11plus weeks	5
Don't know	40
<b>Average</b>	<b>4.67</b>
Base	719

The above table clearly shows almost a complete lack of awareness of one of the main advantages of a season ticket. Four out of ten commuters have no idea of how many weeks 'free' travel are offered by the annual season ticket and a similar proportion believe that it is between zero and four. Even amongst season ticket holders, levels of awareness are low. A third of these commuters don't know how many 'free' weeks are provided and the average amongst those who offered an opinion was just 5 weeks – barely higher than the overall average above.

Regular commuters who travelled using daily tickets were asked for the main reasons why they did not obtain a season ticket.

***“Why don’t you have a season ticket” - Table 25***

	%
Irregular travel patterns	59
Not value for money	19
Haven’t got money to pay in advance	14
Can’t afford one	11
Don’t want to commit	9
Haven’t got round to it	7
Have to get a photocard	4
Don’t know how to	2
Other/Don’t Know	15
Base (all regular travellers with no season ticket - responding)	209

Note: respondents could choose more than one reason

Almost six out of ten of these passengers cite irregular travel patterns as the main reason why they have not acquired a season ticket. This was comfortably the most significant barrier.

Other reasons for non purchase relate primarily to cost. Either, commuters don’t see the season ticket as offering value for money (and given the lack of awareness of the amount of free travel provided by season tickets, this is not surprising) or they can’t afford to pay the lump sum in advance. A small minority (nevertheless representing a substantial number of commuters) have some intention to buy a season ticket but simply have not got round to it yet.

Commuters without season tickets were asked whether or not they could get financial help – an interest free loan from employers for example - if they wanted to buy one.

***“Could you get financial help if you wanted to buy a season ticket” - Table 26***

	%
Yes	22
No	61
Don’t Know	17
Base (all regular travellers with no season ticket - responding)	227

A fifth of these commuters could get financial help if they chose to purchase a season ticket and a further 17% are not sure either way.

Those who were unable to get any help (61% of commuters who don't have a season ticket) were asked whether they would buy a season ticket if this help was available.

***“If this help was available, would you buy a season ticket” - Table 27***

	%
Yes	39
No	61
Base (all who couldn't get help)	154

Four out of ten of these commuters – representing about a quarter of those who travel regularly but don't have a season ticket – would proceed to purchase a season ticket if the financial help was available. There was higher than average interest amongst females and those under the age of 26 although it should be noted that a relatively small number of these passengers responded to this question.

We also tested the appeal of being able to pay for an annual season ticket in equal instalments over a 12 month period (at 0% interest) and of a carnet of 10 train tickets (no mention of price or discounts).

***“Likelihood of buying annual season ticket if pay by equal instalments over 12 months at 0% interest” - Table 28***

	%
Very likely	17
Fairly likely	22
Neither	17
Fairly unlikely	9
Very unlikely	26
Don't know	10
Base (all regular travellers with no season ticket - responding)	234

***“Interest in buying book of 10 tickets” – Table 28a***

	%
Very interested	47
Fairly interested	36
Neither	7
Fairly uninterested	5
Very uninterested	3
Don't know	2
Base (all regular travellers with no season ticket - responding)	239

Slightly under a fifth of commuters currently travelling without season tickets would be very likely to buy one if they had the options to do so, interest free, over a 12 month period. An additional 22% would be fairly likely to pursue this offer if it were available. Particularly keen are the 26-44 year olds whilst those least interested includes, perhaps not surprisingly, those who are earning in excess of £50k pa.

The carnet concept has been very well received by those who don't have a season ticket but travel regularly. Indeed, over 80% of these commuters (and almost 90% of females) express an interest in acquiring a carnet whilst almost half are very interested in doing so.

### 3.8 Potential for Shift in Travel Times

Commuters who regularly travel during peak hours were asked whether or not they would be likely to shift their travel times in order to miss the busiest periods of the day. They were then asked for their likelihood of doing so if, by way of compensation, the cost of their travel was reduced by a). 10% and b). 20%.

***“Likelihood of travelling avoiding the busiest periods” - Table 29***

	%	If cost of ticket reduced by 10% %	If cost of ticket reduced by 20% %
Very likely	5	10	24
Fairly likely	14	7	24
Neither	9	8	10
Fairly unlikely	32	34	12
Very unlikely	41	40	27
Base (all travel during rush hours - responding)	487	358	278

Whilst there is a lukewarm response to the concept initially and in relation to the proposed 10% reduction in the cost of fares, the suggestion of a more substantial reduction in prices was met with some enthusiasm (although it should be noted that a high proportion of the rush hour sample failed to complete this question fully). Those expressing the highest likelihood of shifting travel times in order to receive the 20% fares discount include 16-25 year olds, those with household incomes of under £30k and those with commutes lasting in excess of an hour (presumably those with more expensive journeys).

### 3.9 Saver Tickets

The majority of leisure and business travellers are aware of the existence of the Saver ticket (although we know from the qualitative phase that detailed awareness of the characteristics of the ticket is very limited).

***“Aware of a train ticket called a ‘Saver’” - Table 30***

	<b>Leisure %</b>	<b>Business %</b>
Yes	64	73
No	36	27
Base	760	643

Those who had booked tickets in advance of travel or whose journeys were in excess of 2 hours in duration are the most likely to be aware of the existence of the Saver ticket. There are no significant variations in awareness across regions within the UK

Again reflecting the findings from the qualitative phase, more detailed awareness of the features of the Saver ticket was more mixed.

***Awareness of Saver Details - Table 31***

<i>"Aware that Saver does not need to be booked in advance"</i>	<b>Leisure %</b>	<b>Business %</b>
Yes	55	53
No	45	47
<i>"Aware that Govt regulates fares"</i>		
Yes	31	37
No	69	63
Base (all aware of Saver)	484	468

Approximately half of those who are aware of the Saver also know that this ticket can be purchased on the day of travel and does not need to be booked in advance. A third are aware that some rail fares are regulated by Government. Again, awareness levels are consistent across UK regions.

Those aware of the Saver were asked how they would feel if Government regulation of these ticket prices ended and responsibility for setting Saver fares was handed over to Train Operating Companies.

***"How feel about regulation ending and TOCs setting price for these tickets" - Table 32***

	<b>Leisure %</b>	<b>Business %</b>
Strongly in favour	11	10
Somewhat in favour	13	12
Neither	26	21
Slightly opposed	11	13
Strongly opposed	21	28
Don't know	18	16
Base	484	468

Although a fairly high proportion are not concerned either way, leisure and business passengers, on balance, are opposed to TOC setting of Saver fares.

### 3.10 National Railcards

Rail passengers were asked for their level of interest in a new National Railcard which, for an upfront fee of £30, would provide 50% off the cost of off-peak rail travel.

***“Overall, how interested would you be in a railcard costing £30 providing 50% off cost of off-peak travel” - Table 33***

	<b>Commuters %</b>	<b>Leisure %</b>	<b>Business %</b>
Very interested	23	31	26
Fairly interested	27	27	28
Neither	13	12	12
Fairly uninterested	11	7	13
Very uninterested	19	13	17
Don't know	5	10	4
Base	719	760	643

Interest levels are healthy (50% plus) across all passenger segments and particularly so for leisure travellers.

Within leisure passengers and commuters there is higher than average interest amongst those aged 16-25 and those with household incomes of less than £30k.

## 4. Appendix

### 4.1 Locations

#### **10 x London - within the M25**

1. London Bridge
2. Victoria
3. Kings X
4. Waterloo
5. Liverpool Street
6. Paddington
7. Clapham Junction
8. Wimbledon
9. Richmond
10. Charing Cross

#### **10 x South East - outside the M25**

1. East Croydon
2. Reading
3. Brighton
4. Guildford
5. Woking
6. Romford
7. Bromley South
8. Southampton Central
9. Portsmouth
10. Watford Junction

#### **5 x Midlands**

1. Birmingham New Street
2. Nottingham
3. Leicester
4. Wolverhampton
5. Derby

#### **3 x Wales**

1. Cardiff Central
2. Swansea
3. Newport Gwent

#### **3 x South West**

1. Bristol Temple Meads
2. Plymouth
3. Swindon

**10 x North**

1. Manchester Piccadilly
2. Leeds
3. Liverpool Lime Street
4. York
5. Newcastle
6. Sheffield
7. Huddersfield
8. Stockport
9. Darlington
10. Preston Lancs

**4 x Scotland**

1. Edinburgh
2. Glasgow Queen Street
3. Paisley Gil Street
4. Aberdeen

## 4.2 Questionnaires

Station Code (Interviewer to Enter) \_\_\_\_\_

<input type="text"/>					
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**National Rail Fares Survey**  
**SURVEY OF UK RAIL PASSENGERS – COMMUTER VERSION**

Thank you for agreeing to take part in this survey. This is a national survey on the subject of rail fares, conducted by Outlook Research on behalf of Passenger Focus. Passenger Focus is the official, independent consumer organisation representing the interests of rail users nationally. In order to help Passenger Focus represent the views of rail passengers, we would appreciate a little of your time to complete and return this questionnaire. The questions are very straightforward and will only take a short time to answer.

- THIS QUESTIONNAIRE ONLY RELATES TO NATIONAL RAIL, NOT TO THE UNDERGROUND
- TO ANSWER THE QUESTIONS, PLEASE TICK THE BOX NEXT TO THE ANSWER(S) THAT APPLY OR WRITE IN THE SPACE PROVIDED.
- TICK ONE BOX PER QUESTION UNLESS THE QUESTION ALLOWS YOU TO TICK MORE.
- PLEASE COMPLETE ALL OF THE QUESTIONS UNLESS THERE IS AN INSTRUCTION (IN RED) TO SKIP AND GO TO ANOTHER

Just to reassure you, this research is being conducted strictly within the guidelines of the Market Research Society. Your responses will remain anonymous and results will be reported in the form of overall percentages; no results will ever be attributable to any individual.

**Thank you for your help with this important survey.**

**SECTION 1 – YOUR JOURNEY TODAY**

**When answering these questions, please think about the journey you were about to make OR had just made when you were handed this questionnaire**

Q1. What is the name of the company that operates the train you travelled on today?

Write in:

Don't know ..... TICK BOX

Q2. And were you... **Tick all that apply**

- Travelling alone .....
- Travelling with other adults .....
- Travelling with children aged 0-4 .....
- Travelling with children aged 5-10 .....
- Travelling with children aged 11-15 .....

Q3. Approximately what time did you board the train before or after you were handed this questionnaire? **Tick one box**

- |   |   |
|---|---|
| Before 8am ..... <input type="checkbox"/>     | 16.00 to 16.59 ..... <input type="checkbox"/> |
| 08.00 to 08.59 ..... <input type="checkbox"/> | 17.00 to 18.59 ..... <input type="checkbox"/> |
| 09.00 to 09.59 ..... <input type="checkbox"/> | 19.00 or later ..... <input type="checkbox"/> |
| 10.00 to 15.59 ..... <input type="checkbox"/> |   |

Q4. What was the main purpose of your journey? **Tick one box**

- Daily commute to or from work .....
- Less regular commute to or from work .....
- Daily commute to or from place of study (school/college/university) .....
- Less regular commute to or from place of study (school/college/university) ..
- On company business (or own if self employed) .....
- On personal business (job interview, dentist, etc.) .....
- Visiting friends or relatives .....
- Shopping trip .....
- Travel to or from holiday .....
- A day out .....
- Other leisure trip .....

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**Q5. What type of ticket did you use for your journey? Tick one box**

- Standard Class Single/Return .....
- First Class Single/Return .....
- Standard Class Season Ticket – Annual .....
- Standard Class Season Ticket – Monthly .....
- Standard Class Season Ticket – Weekly .....
- First Class Season Ticket – Annual .....
- First Class Season Ticket – Monthly .....
- First Class Season Ticket – Weekly .....
- Cheap Day Single/Return .....
- Saver/Super Saver .....
- Awaybreak/Stayaway .....
- Apex/Super Apex .....
- One Day Travelcard .....
- A special promotion ticket .....
- Holiday package/tour ticket .....
- Rail Staff Pass/Privilege Ticket/Police Concession .....
- Group Saver Ticket .....

Other: Please write in

**Q6. Why did you choose this ticket? Tick all that apply**

- Cheapest .....
- Needed flexibility .....
- Only one offered/available .....
- Special promotion/deal .....
- Advised by train staff .....
- Someone else chose it .....
- Quickest route .....

Other: Please write in

**Q7. Overall, how satisfied are you with the value for money of the price of the ticket you travelled with today? Tick one box**

- Very satisfied .....
- Fairly satisfied .....
- Neither satisfied nor dissatisfied .....
- Fairly dissatisfied .....
- Very dissatisfied .....
- No opinion/don't know .....

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Q8. To what extent did you look for the best priced ticket for this journey?  
**Tick one box**

- Looked around extensively .....
- Looked around a bit .....
- Didn't look around .....
- Don't know/Someone else purchased it .....
- Not relevant/only one price/fixed price .....

Q9. Do you feel that you had the best value ticket given your travel needs on this occasion?  
**Tick one box**

- Yes .....
- No .....
- Don't know .....

Q10. When was this ticket purchased?  
**Tick one box**

- Today .....
- In the last week .....
- 1-2 weeks ago .....
- 3-4 weeks ago .....
- 1-3 months ago .....
- More than 3 months ago .....
- Don't know .....

Q11. Did you purchase the ticket yourself?  
**Tick one box**

- Yes .....
- No .....

Q12. And how was your ticket purchased?  
**Tick one box**

- Over the phone .....
- At the train station – from ticket window/office .....
- At the train station – from ticket machine .....
- From a travel agent .....
- Via the internet/a website .....
- On the train from member of train staff .....
- Other method of purchase .....
- The ticket was organised for me .....
- .....

Q13. And did you use a railcard to buy your ticket? If so which one?

**Tick one box**

- Did not use a railcard .....
- Young Persons Railcard .....
- Senior Railcard .....
- Family Railcard .....
- Disabled Persons Railcard .....
- Network Railcard .....
- Forces Railcard.....

Other Railcard: Please write in

Q14. And how long was your journey on this train **scheduled** to take?

**Tick one box**

- Less than 1 hour .....
- 1-2 hours.....
- More than 2 hours – up to 3.....
- More than 3 hours.....

**SECTION 2 – YOUR VIEWS**

Q15. Please indicate below the extent to which you either agree or disagree with the following statements regarding rail tickets and fares.

	<b>Agree strongly</b>	<b>Agree</b>	<b>Neither agree nor disagree</b>	<b>Disagree</b>	<b>Disagree strongly</b>	<b>Don't know/not applicable</b>
Rail tickets are generally priced fairly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand the range of tickets and fares available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly season tickets offer better value for money than daily tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monthly season tickets offer better value for money than daily tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual season tickets offer better value for money than daily tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Q16. We would like you to think about the following places where you can buy tickets. For each, please indicate (using the following scale) the extent to which you would trust it to provide you with the best value for money ticket for the journey you would be making.

	<b>Would trust entirely</b>	<b>Would tend to trust</b>	<b>Neither trust nor distrust</b>	<b>Would tend to distrust</b>	<b>Would distrust entirely</b>
Ticket office at train stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket machine at train station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
From train staff on the train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Answer Q17 if you travel on the train all or most days BUT don't have a period ticket (weekly, monthly, annual). All others go to Q21**

Q17. What are the main reasons why you don't have a season ticket?

**Tick all that apply**

- Can't afford one .....
- Haven't got the money to pay in advance.....
- Irregular travel patterns.....
- Haven't got round to it.....
- Don't know how to get one .....
- Have to get a photocard .....
- Don't want to commit .....
- Doesn't offer value for money.....
- Other (write in) .....

Q18. Could you potentially get any financial help if you wanted to buy a season ticket? For example – an interest free loan from an employer.

**Tick one box**

Yes.....  **GO TO Q19**

No .....

you Don't know ...



Q18a. If this help was available, would you buy a season ticket?

Yes .....

Q19. How likely would you be to buy an annual season ticket if you were able to pay for it, interest free, by equal instalments over a 12 month period? No .....

**Tick one box**

- Very likely .....
- Fairly likely .....
- Neither likely nor unlikely .....
- Fairly unlikely .....
- Very unlikely .....
- Don't know .....

Q20. How interested would you be in purchasing a book of, say, 10 tickets for you to use as and when you travel? This would mean that you wouldn't have to purchase a ticket every time you made a journey.

**Tick one box**

- Very interested.....
- Fairly interested .....
- Neither interested nor uninterested .....
- Fairly uninterested .....
- Very uninterested.....
- Don't know .....

**Answer Q21 if you have a season ticket (weekly, monthly, annual). All others go to Q23**

Q21. On renewal of a season ticket, have you ever received a discount due to poor train service in the previous period? **Tick one box**

- Yes.....
- No .....
- Have never renewed a season ticket.....
- Don't know .....

Q22. Have you ever received vouchers or money from a train operating company by way of compensation for poor performance?

**Tick one box**

- Yes.....
- No .....

**ALL TO ANSWER**

Q23. What would you say are the main advantages of a season ticket?

**Tick all that apply**

- Don't have to queue for tickets .....
- Can use at weekends .....
- Cheaper than buying tickets everyday.....
- Effectively provides some free travel .....
- Usually come with extra benefits .....

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Q24. Less hassle.....  
And what would you say are the main disadvantages of a season ticket?

**Tick all that apply**

- Have to pay upfront .....
- Travel requirements might change .....
- Need a photocard .....
- Expensive .....

Q25. How many weeks of 'free' travel do you think the average **annual season ticket** provides (when compared to the cost of buying weekly tickets)?

**Tick one box**

- None .....
- 1-2 weeks .....
- 3-4 weeks .....
- 5-7 weeks .....
- 8-10 weeks .....
- 11-12 weeks .....
- More than 12 weeks .....
- Don't know .....

Q26. In order to reduce levels of crowding on trains and at stations in the rush hour, different ways of encouraging people to change the times at which they travel are being considered. Do you ever travel during the morning or afternoon rush hours?

**Tick one box**

- Yes - frequently..... **GO TO Q26a**
- Yes - occasionally..... **GO TO Q26a**
- No ..... **GO TO Q27**

	<b>Very likely</b>	<b>Likely</b>	<b>Neither likely nor unlikely</b>	<b>Unlikely</b>	<b>Very unlikely</b>
Q26a. How likely is it that you would be able to travel earlier or later to avoid the busiest periods in the morning or afternoon?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q26b. How likely would you be to change your times of travel to avoid the rush hour if the cost of your ticket were to be reduced by 10%?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q26c. And how likely would you be to change your times of travel to avoid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

the rush hour if the cost of your ticket were to be reduced by 20%?

Q27. How interested would you be in purchasing a National Railcard which, for the cost of £30 up-front, would entitle you to 50% off the cost of all off-peak travel?

**Tick one box**

- Very interested.....
- Fairly interested.....
- Neither interested nor uninterested.....
- Fairly uninterested.....
- Very uninterested.....
- Don't know.....

<b>SECTION 3 – ABOUT YOU</b>
------------------------------

Finally, to help ensure we hear from a good cross section of train passengers, please can you let us have the following information about yourself.

Q28. What is your age? **Tick one box**

- |                                     |                                      |
|-------------------------------------|--------------------------------------|
| 16-25..... <input type="checkbox"/> | 55-59..... <input type="checkbox"/>  |
| 26-34..... <input type="checkbox"/> | 60-64..... <input type="checkbox"/>  |
| 35-44..... <input type="checkbox"/> | 65-69..... <input type="checkbox"/>  |
| 45-54..... <input type="checkbox"/> | 70plus..... <input type="checkbox"/> |

Q29. Are you? **Tick one box**

- |                                    |                                      |
|------------------------------------|--------------------------------------|
| Male..... <input type="checkbox"/> | Female..... <input type="checkbox"/> |
|------------------------------------|--------------------------------------|

Q30. What is your working status? **Tick one box**

- |   |   |
|---|---|
| Working full time..... <input type="checkbox"/> | Retired..... <input type="checkbox"/>           |
| Working part time..... <input type="checkbox"/> | Full time student..... <input type="checkbox"/> |
| Not working..... <input type="checkbox"/>       |   |

Q31. Which of the following best describes the occupation of the main wage earner in your household?

**Tick one box**

- Professional/senior management.....
- Middle management.....
- Junior management/clerical/supervisory.....
- Skilled manual (with qualifications/apprenticeship).....
- Unskilled manual.....
- Full time student.....
- Retired.....
- Unemployed/between jobs.....

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Housewife/househusband .....   
Other.....

**Q32.** Which of the following represents your annual household income before tax and National Insurance? We are asking this question because income could influence attitudes toward rail fares.

**Tick one box**

Under £10,000 .....   
£10,000 to £12,000.....   
£12,001 to £15,000.....   
£15,001 to £20,000.....   
£20,001 to £25,000.....   
£25,001 to £30,000.....   
£30,001 to £40,000.....   
£40,001 to £50,000.....   
£50,001 to £70,000.....   
More than £70,000.....   
Rather not say .....

**Q33.** Do you have a disability or long term illness related to any of the following?

**Tick all that apply**

Yes: Mobility .....   
Yes: Wheelchair user.....   
Yes: Hearing .....   
Yes: Eyesight.....   
Yes: Speech impediment.....   
Yes: Learning difficulties.....   
No: None.....

**Q34.** In which region do you live? **Tick one box**

Greater London..... <input type="checkbox"/>	Wales ..... <input type="checkbox"/>
South East (outside London) ..... <input type="checkbox"/>	North East ..... <input type="checkbox"/>
South West ..... <input type="checkbox"/>	North West ..... <input type="checkbox"/>
East Midlands ..... <input type="checkbox"/>	Scotland ..... <input type="checkbox"/>
West Midlands ..... <input type="checkbox"/>	Eastern..... <input type="checkbox"/>

**Q35.** Which of the following best describes your ethnicity? **Tick one box**

White - British <input type="checkbox"/>	Mixed race -White & Black Caribbean <input type="checkbox"/>
White - Irish <input type="checkbox"/>	Mixed race -White & Black African <input type="checkbox"/>
White - Other <input type="checkbox"/>	Mixed race -White & Asian <input type="checkbox"/>
	Mixed race - Other <input type="checkbox"/>
Asian/Asian British – Indian <input type="checkbox"/>	Black/Black British - Caribbean <input type="checkbox"/>
Asian/Asian British – Pakistani <input type="checkbox"/>	Black/Black British - African <input type="checkbox"/>
<input type="checkbox"/>	
<input type="checkbox"/>	

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Asian/Asian British – Bangladeshi      Black/Black British - Other        
Asian/Asian British – Other       Other (please write in below)  
Chinese

Q36. Do you own or have regular access to a car which you drive?      **Tick one box**  
Yes.....      No.....

Q37. Do you ever make purchases via the internet?      **Tick one box**  
Yes.....      No.....

Q38. On what day of the week were you handed this questionnaire?      **Tick one box**  
Monday .....      Tuesday.....  
Wednesday.....      Thursday .....  
Friday.....      Saturday.....  
Sunday.....

Q38. And finally, when did you complete this questionnaire?      **Tick one box**  
On the train immediately after receiving it .....  
Later on the same day .....  
The following day.....  
2-3 days after receiving it.....  
4-5 days after receiving it.....  
Longer period after receiving it .....

When you have completed the questionnaire, please return it to us in the envelope provided or use the following FREEPOST address.

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**THANK YOU FOR YOUR TIME.**

**PLEASE RETURN THIS QUESTIONNAIRE IN THE  
FREEPOST ENVELOPE PROVIDED.**

Station Code (Interviewer to Enter) \_\_\_\_\_

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**National Rail Fares Survey**  
**SURVEY OF UK RAIL PASSENGERS - BUSINESS**

Thank you for agreeing to take part in this survey. This is a national survey on the subject of rail fares, conducted by Outlook Research on behalf of Passenger Focus. Passenger Focus is the official, independent consumer organisation representing the interests of rail users nationally. In order to help Passenger Focus represent the views of rail passengers, we would appreciate a little of your time to complete and return this questionnaire. The questions are very straightforward and will only take a short time to answer.

- THIS QUESTIONNAIRE ONLY RELATES TO NATIONAL RAIL, NOT TO THE UNDERGROUND
- TO ANSWER THE QUESTIONS, PLEASE TICK THE BOX NEXT TO THE ANSWER(S) THAT APPLY OR WRITE IN THE SPACE PROVIDED.
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- PLEASE COMPLETE ALL OF THE QUESTIONS UNLESS THERE IS AN INSTRUCTION (IN RED) TO SKIP AND GO TO ANOTHER

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**Thank you for your help with this important survey.**

**SECTION 1 – YOUR JOURNEY TODAY**

**When answering these questions, please think about the journey you were about to make OR had just made when you were handed this questionnaire**

Q1. What is the name of the company that operates the train you travelled on today?

Write in:

Don't know ..... TICK BOX

Q2. And were you... **Tick all that apply**

- Travelling alone .....
- Travelling with other adults .....
- Travelling with children aged 0-4 .....
- Travelling with children aged 5-10 .....
- Travelling with children aged 11-15 .....

Q3. Approximately what time did you board the train before or after you were handed this questionnaire? **Tick one box**

- |   |   |
|---|---|
| Before 8am ..... <input type="checkbox"/>     | 16.00 to 16.59 ..... <input type="checkbox"/> |
| 08.00 to 08.59 ..... <input type="checkbox"/> | 17.00 to 18.59 ..... <input type="checkbox"/> |
| 09.00 to 09.59 ..... <input type="checkbox"/> | 19.00 or later ..... <input type="checkbox"/> |
| 10.00 to 15.59 ..... <input type="checkbox"/> |   |

Q4. What was the main purpose of your journey? **Tick one box**

- Daily commute to or from work .....
- Less regular commute to or from work .....
- Daily commute to or from place of study (school/college/university) .....
- Less regular commute to or from place of study (school/college/university) ..
- On company business (or own if self employed) .....
- On personal business (job interview, dentist, etc.) .....
- Visiting friends or relatives .....
- Shopping trip .....
- Travel to or from holiday .....
- A day out .....
- Other leisure trip .....

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**Q5. What type of ticket did you use for your journey? Tick one box**

- Standard Class Single/Return .....
- First Class Single/Return .....
- Standard Class Season Ticket – Annual .....
- Standard Class Season Ticket – Monthly .....
- Standard Class Season Ticket – Weekly .....
- First Class Season Ticket – Annual .....
- First Class Season Ticket – Monthly .....
- First Class Season Ticket – Weekly .....
- Cheap Day Single/Return .....
- Saver/Super Saver .....
- Awaybreak/Stayaway .....
- Apex/Super Apex .....
- One Day Travelcard .....
- A special promotion ticket .....
- Holiday package/tour ticket .....
- Rail Staff Pass/Privilege Ticket/Police Concession .....
- Group Saver Ticket .....

Other: Please write in

**Q6. Why did you choose this ticket? Tick all that apply**

- Cheapest .....
- Needed flexibility .....
- Only one offered/available .....
- Special promotion/deal .....
- Advised by train staff .....
- Someone else chose it .....
- Quickest route .....

Other: Please write in

**Q7. Overall, how satisfied are you with the value for money of the price of the ticket you travelled with today? Tick one box**

- Very satisfied .....
- Fairly satisfied .....
- Neither satisfied nor dissatisfied .....
- Fairly dissatisfied .....
- Very dissatisfied .....
- No opinion/don't know .....

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Q8. To what extent did you look for the best priced ticket for this journey?  
**Tick one box**

- Looked around extensively .....
- Looked around a bit .....
- Didn't look around .....
- Don't know/Someone else purchased it .....
- Not relevant/only one price/fixed price .....

Q9. Do you feel that you had the best value ticket given your travel needs on this occasion?  
**Tick one box**

- Yes .....
- No .....
- Don't know .....

Q10a. When did you know that you were going to make this journey?  
**Tick one box**

- Today .....
- In the last week .....
- 1-2 weeks ago .....
- 3-4 weeks ago .....
- 1-3 months ago .....
- More than 3 months ago .....
- Don't know .....

Q10b. And did you know at this point the time that you wanted to travel?  
**Tick one box**

- Yes .....
- No .....

Q11. When was this ticket purchased?  
**Tick one box**

- Today .....
- In the last week .....
- 1-2 weeks ago .....
- 3-4 weeks ago .....
- 1-3 months ago .....
- More than 3 months ago .....
- Don't know .....

**If you bought the ticket today please continue – all others, skip to Q13**

Q12a. Would your ticket have been cheaper if you had bought it before today?

**Tick one box**

- Yes.....
- No .....
- Don't know .....

Q12b. If your ticket would have been significantly cheaper if booked in advance, how likely would you have been to do this?

**Tick one box**

- Very likely .....
- Fairly likely .....
- Neither likely nor unlikely .....
- Fairly unlikely .....
- Very unlikely .....
- Don't know .....

**All to answer**

Q13. Did you purchase the ticket yourself?

**Tick one box**

- Yes.....
- No .....

Q14. And how was your ticket purchased?

**Tick one box**

- Over the phone .....
- At the train station – from ticket window/office.....
- At the train station – from ticket machine.....
- From a travel agent.....
- Via the internet/a website .....
- On the train from member of train staff .....
- Other method of purchase .....
- The ticket was organised for me.....

Q15. And did you use a railcard to buy your ticket? If so which one?

**Tick one box**

- Did not use a railcard.....
- Young Persons Railcard.....
- Senior Railcard .....
- Family Railcard .....
- Disabled Persons Railcard .....
- Network card.....
- Gold card .....

Forces Railcard.....  
Other Railcard: Please write in

Q16. And how long was your journey on this train **scheduled** to take?  
**Tick one box**  
Less than 1 hour .....  
1-2 hours.....  
More than 2 hours – up to 3.....  
More than 3 hours.....

Q16a. Is this a train journey that you have made before?  
**Tick one box**  
Yes – several times .....  
Yes – once or twice .....  
No .....

<b>SECTION 2 – YOUR VIEWS</b>
-------------------------------

Q17. Please indicate below the extent to which you either agree or disagree with the following statements regarding rail tickets and fares.

	<b>Agree strongly</b>	<b>Agree</b>	<b>Neither agree nor disagree</b>	<b>Disagree</b>	<b>Disagree strongly</b>	<b>Don't know/not applicable</b>
Rail tickets are generally priced fairly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am confident of being able to find the best value tickets for the journeys I make	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand the range of tickets and fares available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would travel more on trains if the fares were a bit cheaper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't mind booking early in order to get cheaper fares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There should be a standard price for a journey regardless of when you buy the ticket.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am confident of being able to find the cheapest tickets for the journey that I make.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Q18. We would like you to think about the following places where you can buy tickets. For each, please indicate (using the following scale) the extent to which you would trust it to provide you with the best value for money ticket for the journey you would be making.

	<b>Would trust entirely</b>	<b>Would tend to trust</b>	<b>Neither trust nor distrust</b>	<b>Would tend to distrust</b>	<b>Would distrust entirely</b>
Ticket office at train station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket machine at train station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
From train staff on the train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q19. Do you generally prefer to buy train tickets on the day of your train journey or do you prefer to buy them in advance of this?

**Tick one box**

- On the day .....  **GO TO Q22**
- In advance .....  **GO TO Q20**
- No preference .....  **GO TO Q22**

Q20. What are the main reasons why you prefer to buy tickets in advance?

**Tick all that apply**

- Cheaper .....
- Ability to reserve a seat .....
- Need to make plans in advance .....
- Don't have to think about it on the day of travel.....
- Don't have to queue on the day of travel .....
- Other .....
- .....

- Q21. a. As far as you are aware, how far in advance **can** you book long distance train tickets?  
 b. And how far in advance do you think you **should** be able to book long distance train tickets?

	Can	Should.
	a.	b.
Up to a week	<input type="checkbox"/>	<input type="checkbox"/>
1-2 weeks	<input type="checkbox"/>	<input type="checkbox"/>
3-4 weeks	<input type="checkbox"/>	<input type="checkbox"/>
1-2 months	<input type="checkbox"/>	<input type="checkbox"/>
2-3 months	<input type="checkbox"/>	<input type="checkbox"/>
3-4 months	<input type="checkbox"/>	<input type="checkbox"/>
4-5 months	<input type="checkbox"/>	<input type="checkbox"/>
5-6 months	<input type="checkbox"/>	<input type="checkbox"/>
6-12 months	<input type="checkbox"/>	<input type="checkbox"/>

**ALL TO ANSWER**

- Q22. With regard to your own schedule and arrangements, how much flexibility did you have with regard to the time you travelled on this journey?

**Tick one box**

- A great deal of flexibility .....   
 Some flexibility .....   
 No flexibility .....

- Q23. And how much flexibility did your ticket allow you?

**Tick one box**

- A great deal of flexibility .....   
 Some flexibility .....   
 No flexibility .....   
 Don't know .....

- Q24. Generally, how aware are you of the range of different train tickets that are available?

**Tick one box**

- Fully aware .....   
 Somewhat aware .....   
 Unaware .....   
  
 Don't know .....

- Q25. Were you aware that there is a train ticket called a 'Saver'?

**Tick one box**

- Yes.....  **GO TO Q26**  
 No .....  **GO TO Q29**

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Q26. Were you aware that the Saver ticket does not need to be booked in advance and can be purchased on the day of travel?

Tick one box

- Yes.....  
No .....

Q27. Were you aware that the Government regulates the fares for certain types of tickets?

Tick one box

- Yes.....  
No .....

Q28. The price of the 'Saver' ticket is currently regulated by Government. How would you feel about this regulation ending and train operating companies setting the price of these tickets?

Tick one box

- Strongly in favour .....  
Somewhat in favour .....  
Neither in favour nor opposed .....  
Slightly opposed .....  
Strongly opposed.....  
Don't know .....

**ALL TO ANSWER**

Q29. Does your company (or do you, if you are self employed) have any rules with regard to business travel by train?

Tick all that apply

- Always travel first class.....  
Travel First Class when the cost can be justified.....  
Never travel first class .....  
Always travel standard class .....  
Always book well in advance .....  
Always find the cheapest ticket.....  
  
No fixed rules/depends .....

Q30a. Were you offered a choice of different tickets for this journey?

- Yes..... **GO TO Q30b**  
No ..... **GO TO Q31**

Q30b. Which of the following was the most important consideration when you decided which ticket to purchase?

**Tick one box**

- Flexibility of times and dates offered by the ticket .....
- Cost of the ticket .....
- Seat reservations possible.....
- Level of comfort .....
- No choice of ticket .....
- Don't know .....

Q31. And did you travel on the train that you **ideally** would have wanted to be on?

Yes.....  **GO TO Q32**

No .....

Q31a. Why weren't you on your ideal train?

- Too expensive .....
- Fully booked .....
- Other reason .....

Q31b. And how inconvenient was it to you to be on a train that wasn't ideal?

- Very inconvenient.....
- Fairly inconvenient .....
- Not inconvenient.....

**If you travelled First Class please continue – if not please go to Q33**

Q32. What would you say are the main reasons you decided to travel First Class?

**Tick up to 3 boxes**

- Greater ability to work.....
- More space .....
- More comfortable seats .....
- Quieter than standard class .....
- Food or drink included .....
- Access to lounges at stations .....
- Access to electric point.....
- Always get a table.....
- Wi-fi connection .....
- Always do .....
- All inclusive ticket price.....
- Seat reservations available.....
- Flexibility of train times .....
- Other.....

If you did not travel First Class please continue – if you did please go to Q34

Q33. Did you consider travelling First Class for this journey?

Tick one box

- Yes.....  
No .....

**ALL TO ANSWER**

Q34. How interested would you be in purchasing a National Railcard which, for the cost of £30 up-front, would entitle you to 50% off the cost of all **off-peak** travel?

Tick one box

- Very interested.....  
Fairly interested .....  
Neither interested nor uninterested .....  
Fairly uninterested .....  
Very uninterested.....  
Don't know .....

**SECTION 3 – ABOUT YOU**

Finally, to help ensure we hear from a good cross section of train passengers, please can you let us have the following information about yourself.

Q35. What is your age?

Tick one box

- |                                     |                                      |
|-------------------------------------|--------------------------------------|
| 16-25..... <input type="checkbox"/> | 55-59 ..... <input type="checkbox"/> |
| 26-34..... <input type="checkbox"/> | 60-64 ..... <input type="checkbox"/> |
| 35-44..... <input type="checkbox"/> | 65-69 ..... <input type="checkbox"/> |
| 45-54..... <input type="checkbox"/> | 70plus..... <input type="checkbox"/> |

Q36. Are you?

Tick one box

- Male ..... Female .....

Q37. What is your working status?

Tick one box

- |  |  |
|--|--|
| Working full time ..... <input type="checkbox"/> | Retired..... <input type="checkbox"/>            |
| Working part time..... <input type="checkbox"/>  | Full time student ..... <input type="checkbox"/> |
| Not working..... <input type="checkbox"/>        |  |

Q38. Which of the following best describes the occupation of the main wage earner in your household?

**Tick one box**

- Professional/senior management .....
- Middle management .....
- Junior management/clerical/supervisory .....
- Skilled manual (with qualifications/apprenticeship) .....
- Unskilled manual .....
- Full time student .....
- Retired .....
- Unemployed/between jobs .....
- Housewife/househusband .....
- Other .....

Q39. Which of the following represents your annual household income before tax and National Insurance? We are asking this question because income could influence attitudes toward rail fares.

**Tick one box**

- Under £10,000 .....
- £10,000 to £12,000 .....
- £12,001 to £15,000 .....
- £15,001 to £20,000 .....
- £20,001 to £25,000 .....
- £25,001 to £30,000 .....
- £30,001 to £40,000 .....
- £40,001 to £50,000 .....
- £50,001 to £70,000 .....
- More than £70,000 .....
- Rather not say .....

Q40. Do you have a disability or long term illness related to any of the following?

**Tick all that apply**

- Yes: Mobility .....
- Yes: Wheelchair user .....
- Yes: Hearing .....
- Yes: Eyesight .....
- Yes: Speech impediment .....
- Yes: Learning difficulties .....
- No: None .....

**Passenger Requirements From Rail Fares  
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Q41. In which region do you live? **Tick one box**

- |                                   |                          |                  |                          |
|-----------------------------------|--------------------------|------------------|--------------------------|
| Greater London.....               | <input type="checkbox"/> | Wales .....      | <input type="checkbox"/> |
| South East (outside London) ..... | <input type="checkbox"/> | North East ..... | <input type="checkbox"/> |
| South West .....                  | <input type="checkbox"/> | North West ..... | <input type="checkbox"/> |
| East Midlands .....               | <input type="checkbox"/> | Scotland .....   | <input type="checkbox"/> |
| West Midlands .....               | <input type="checkbox"/> | Eastern.....     | <input type="checkbox"/> |

Q42. Which of the following best describes your ethnicity? **Tick one box**

- |                                   |                          |                                     |                          |
|-----------------------------------|--------------------------|-------------------------------------|--------------------------|
| White - British                   | <input type="checkbox"/> | Mixed race -White & Black Caribbean | <input type="checkbox"/> |
| White - Irish                     | <input type="checkbox"/> | Mixed race -White & Black African   | <input type="checkbox"/> |
| White - Other                     | <input type="checkbox"/> | Mixed race -White & Asian           | <input type="checkbox"/> |
|                                   |                          | Mixed race - Other                  | <input type="checkbox"/> |
| Asian/Asian British – Indian      | <input type="checkbox"/> | Black/Black British - Caribbean     | <input type="checkbox"/> |
| Asian/Asian British – Pakistani   | <input type="checkbox"/> | Black/Black British - African       | <input type="checkbox"/> |
| Asian/Asian British – Bangladeshi | <input type="checkbox"/> | Black/Black British - Other         | <input type="checkbox"/> |
| Asian/Asian British – Other       | <input type="checkbox"/> |                                     |                          |
| Chinese                           | <input type="checkbox"/> | Other (please write in below)       | <input type="checkbox"/> |
- 

Q43. Do you own or have regular access to a car which you drive? **Tick one box**

- Yes..... No.....

Q44. Do you ever make purchases via the internet? **Tick one box**

- Yes..... No.....

Q45. On what day of the week were you handed this questionnaire? **Tick one box**

- |                |                          |                |                          |
|----------------|--------------------------|----------------|--------------------------|
| Monday .....   | <input type="checkbox"/> | Tuesday.....   | <input type="checkbox"/> |
| Wednesday..... | <input type="checkbox"/> | Thursday ..... | <input type="checkbox"/> |
| Friday.....    | <input type="checkbox"/> | Saturday.....  | <input type="checkbox"/> |
| Sunday.....    | <input type="checkbox"/> |                |                          |

Q46. And finally, when did you complete this questionnaire? **Tick one box**

- On the train immediately after receiving it .....
- Later on the same day .....
- The following day.....
- 2-3 days after receiving it.....
- 4-5 days after receiving it.....

**Passenger Requirements From Rail Fares  
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Longer period after receiving it .....

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Deleted: .

**THANK YOU FOR YOUR TIME.  
PLEASE RETURN THIS QUESTIONNAIRE IN THE  
FREEPOST ENVELOPE PROVIDED.**

Station Code (Interviewer to Enter) \_\_\_\_\_

<input type="checkbox"/>					
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------



**National Rail Fares Survey**  
**SURVEY OF UK RAIL PASSENGERS - LEISURE**

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- PLEASE COMPLETE ALL OF THE QUESTIONS UNLESS THERE IS AN INSTRUCTION (IN RED) TO SKIP AND GO TO ANOTHER

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**Thank you for your help with this important survey.**

**SECTION 1 – YOUR JOURNEY TODAY**

**When answering these questions, please think about the journey you were about to make OR had just made when you were handed this questionnaire**

Q1. What is the name of the company that operates the train you travelled on today?

Write in:

Don't know ..... TICK BOX

Q2. And were you... **Tick all that apply**

- Travelling alone .....
- Travelling with other adults .....
- Travelling with children aged 0-4 .....
- Travelling with children aged 5-10 .....
- Travelling with children aged 11-15 .....

Q3. Approximately what time did you board the train before or after you were handed this questionnaire? **Tick one box**

- |   |   |
|---|---|
| Before 8am ..... <input type="checkbox"/>     | 16.00 to 16.59 ..... <input type="checkbox"/> |
| 08.00 to 08.59 ..... <input type="checkbox"/> | 17.00 to 18.59 ..... <input type="checkbox"/> |
| 09.00 to 09.59 ..... <input type="checkbox"/> | 19.00 or later ..... <input type="checkbox"/> |
| 10.00 to 15.59 ..... <input type="checkbox"/> |   |

Q4. What was the **main** purpose of your journey? **Tick one box**

- Daily commute to or from work .....
- Less regular commute to or from work .....
- Daily commute to or from place of study (school/college/university) .....
- Less regular commute to or from place of study (school/college/university) ..
- On company business (or own if self employed) .....
- On personal business (job interview, dentist, etc.) .....
- Visiting friends or relatives .....
- Shopping trip .....
- Travel to or from holiday .....
- A day out .....
- Other leisure trip .....

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**Q5. What type of ticket did you use for your journey? Tick one box**

- Standard Class Single/Return .....
- First Class Single/Return .....
- Standard Class Season Ticket – Annual .....
- Standard Class Season Ticket – Monthly .....
- Standard Class Season Ticket – Weekly .....
- First Class Season Ticket – Annual .....
- First Class Season Ticket – Monthly .....
- First Class Season Ticket – Weekly .....
- Cheap Day Single/Return .....
- Saver/Super Saver .....
- Awaybreak/Stayaway .....
- Apex/Super Apex .....
- One Day Travelcard .....
- A special promotion ticket .....
- Holiday package/tour ticket .....
- Rail Staff Pass/Privilege Ticket/Police Concession .....
- Group Saver Ticket .....

Other: Please write in

**Q6. Why did you choose this ticket? Tick all that apply**

- Cheapest .....
- Needed flexibility .....
- Only one offered/available .....
- Special promotion/deal .....
- Advised by train staff .....
- Someone else chose it .....
- Quickest route .....

Other: Please write in

**Q7. Overall, how satisfied are you with the value for money of the price of the ticket you travelled with today? Tick one box**

- Very satisfied .....
- Fairly satisfied .....
- Neither satisfied nor dissatisfied .....
- Fairly dissatisfied .....
- Very dissatisfied .....
- No opinion/don't know .....

Q8. To what extent did you look for the best priced ticket for this journey?  
**Tick one box**

- Looked around extensively .....
- Looked around a bit .....
- Didn't look around .....
- Don't know/Someone else purchased it .....
- Not relevant/only one price/fixed price .....

Q9. Do you feel that you had the best value ticket given your travel needs on this occasion?  
**Tick one box**

- Yes .....
- No .....
- Don't know .....

Q10a. When did you know that you were going to make this journey?  
**Tick one box**

- Today .....
- In the last week .....
- 1-2 weeks ago .....
- 3-4 weeks ago .....
- 1-3 months ago .....
- More than 3 months ago .....
- Don't know .....

Q10b. And did you know at this point the time that you wanted to travel?  
**Tick one box**

- Yes .....
- No .....

Q11. And when was this ticket purchased?  
**Tick one box**

- Today .....
- In the last week .....
- 1-2 weeks ago .....
- 3-4 weeks ago .....
- 1-3 months ago .....
- More than 3 months ago .....
- Don't know .....

**If you bought the ticket today please continue – all others, go to Q13**

Q12a. Would your ticket have been cheaper if you had bought it before today?

**Tick one box**

- Yes.....  **GO TO Q13**  
No .....  **GO TO Q12b**  
Don't know .....  **GO TO Q12b**

Q12b. If you knew that your ticket could have been significantly cheaper if booked in advance, how likely would you have been to do this?

**Tick one box**

- Very likely .....   
Fairly likely .....   
Neither likely nor unlikely .....   
Fairly unlikely .....   
Very unlikely .....   
Don't know .....

**All to answer**

Q13. Did you purchase the ticket yourself?

**Tick one box**

- Yes.....   
No .....

Q14. And how was your ticket purchased?

**Tick one box**

- Over the phone .....   
At the train station – from ticket window/office.....   
At the train station – from ticket machine.....   
From a travel agent.....   
Via the internet/a website .....   
On the train from member of train staff .....   
Other method of purchase .....   
The ticket was organised for me.....   
.....

Q15. And did you use a railcard to buy your ticket? If so which one?

**Tick one box**

- Did not use a railcard.....   
Young Persons Railcard .....   
Senior Railcard .....   
Family Railcard .....   
Disabled Persons Railcard .....   
Network card.....

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Gold card .....   
 Forces Railcard.....   
 Other Railcard: Please write in

Q16. And how long was your journey on this train **scheduled** to take?  
**Tick one box**  
 Less than 1 hour .....   
 1-2 hours.....   
 More than 2 hours – up to 3.....   
 More than 3 hours.....

Q17. Is this a train journey that you have made before?  
**Tick one box**  
 Yes – several times .....   
 Yes – once or twice .....   
 No .....

**SECTION 2 – YOUR VIEWS**

Q18. Please indicate below the extent to which you either agree or disagree with the following statements regarding rail tickets and fares.

	<b>Agree strongly</b>	<b>Agree</b>	<b>Neither agree nor disagree</b>	<b>Disagree</b>	<b>Disagree strongly</b>	<b>Don't know/not applicable</b>
Rail tickets are generally priced fairly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am confident of being able to find the best value tickets for the journeys I make	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand the range of tickets and fares available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would travel more on trains if the fares were a bit cheaper	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't mind booking early in order to get cheaper fares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There should be a standard price for a journey regardless of when you buy the ticket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am confident of being able to find the cheapest tickets for the journey that I make.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Q19. We would like you to think about the following places where you can buy tickets. For each, please indicate (using the following scale) the extent to which you would trust it to provide you with the best value for money ticket for the journey you would be making.

	<b>Would trust entirely</b>	<b>Would tend to trust</b>	<b>Neither trust nor distrust</b>	<b>Would tend to distrust</b>	<b>Would distrust entirely</b>
Ticket office at train stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket machine at train station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
From train staff on the train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q20. Do you generally prefer to buy train tickets on the day of your train journey or do you prefer to buy them in advance of this?

**Tick one box**

- On the day .....  **GO TO Q23**  
 In advance .....  **GO TO Q21**  
 No preference .....  **GO TO Q23**

Q21. What are the main reasons why you prefer to buy tickets in advance?

**Tick all that apply**

- Cheaper .....   
 Ability to reserve a seat .....   
 Need to make plans in advance .....   
 Don't have to think about it on the day of travel.....   
 Don't have to queue on the day of travel .....   
 Other .....   
 .....

- Q22. a. As far as you are aware, how far in advance **can** you book long distance train tickets?  
 b. And how far in advance do you think you **should** be able to book long distance train tickets?

	Can	Should.
	a.	b.
Up to a week	<input type="checkbox"/>	<input type="checkbox"/>
1-2 weeks	<input type="checkbox"/>	<input type="checkbox"/>
3-4 weeks	<input type="checkbox"/>	<input type="checkbox"/>
1-2 months	<input type="checkbox"/>	<input type="checkbox"/>
2-3 months	<input type="checkbox"/>	<input type="checkbox"/>
3-4 months	<input type="checkbox"/>	<input type="checkbox"/>
4-5 months	<input type="checkbox"/>	<input type="checkbox"/>
5-6 months	<input type="checkbox"/>	<input type="checkbox"/>
6-12 months	<input type="checkbox"/>	<input type="checkbox"/>

**ALL TO ANSWER**

- Q23. Thinking about your schedule and arrangements, how much flexibility did you have with regard to the timing of this journey?

**Tick one box**

- A great deal of flexibility.....  
 Some flexibility.....  
 No flexibility.....

- Q24. And how much flexibility did your ticket allow you?

**Tick one box**

- A great deal of flexibility.....  
 Some flexibility.....  
 No flexibility.....  
 Don't know.....

- Q25. Generally, how aware are you of the range of different train tickets that are available?

**Tick one box**

- Fully aware.....  
 Somewhat aware.....  
 Unaware.....

- Q26. Were you aware that there is a train ticket called a 'Saver'?

**Tick one box**

- Yes..... **GO TO Q27**  
 No..... **GO TO Q30**

Q27. Were you aware that the Saver ticket does not need to be booked in advance and can be purchased on the day of travel?

Tick one box

- Yes.....  
No .....

Q28. Were you aware that the Government regulates the fares for certain types of tickets?

Tick one box

- Yes.....  
No .....

Q29. The price of the 'Saver' ticket is currently regulated by Government. How would you feel about this regulation ending and train operating companies setting the price of these tickets?

Tick one box

- Strongly in favour .....  
Somewhat in favour .....  
Neither in favour nor opposed .....  
Slightly opposed .....  
Strongly opposed.....  
Don't know .....

Q30a. Were you offered a choice of different tickets for this journey?

- Yes..... **GO TO Q30b**  
No ..... **GO TO Q31**

Q30b. Which of the following was the most important consideration when you decided which ticket to purchase?

Tick one box

- Flexibility of times and dates offered by the ticket .....  
Cost of the ticket .....  
Seat reservations possible.....  
Level of comfort .....  
No choice of ticket .....  
Don't know .....

Q31. And did you travel on the train that you **ideally** would have wanted to be on?

Yes..... → **GO TO Q32**

No ..... →

Q31a. Why weren't you on your ideal train?

Too expensive .....

Fully booked .....

Other reason .....

  

Q31b. And how inconvenient was it to you to be on a train that wasn't ideal?

Very inconvenient .....

Fairly inconvenient .....

Not inconvenient.....

**ALL TO ANSWER**

Q32. Have you ever decided not to travel by train because of the cost of the ticket?

**Tick one box**

- Yes – a number of times.....  **GO TO Q33**
- Yes – once or twice .....  **GO TO Q33**
- No .....  **GO TO Q34**

**If you have ever decided not to travel by train because of the cost please continue – all others go to Q34**

Q33. Thinking about the last time this happened, what did you end up doing?

**Tick one box**

- Travelled by car instead.....
- Travelled by bus instead.....
- Travelled by coach instead .....
- Travelled by plane instead.....
- Travelled by other method of transport.....
- Did not make the journey after all .....
- Other.....

**If you travelled First Class please continue – if not please go to Q35**

Q34. What would you say are the main reasons you decided to travel First Class?

**Tick up to 3 boxes**

- Greater ability to work.....
- More space.....
- More comfortable seats.....
- Quieter than standard class.....
- Food or drink included.....
- Access to lounges at stations.....
- Access to electric point.....
- Always get a table.....
- Wi-fi connection.....
- Always do.....
- All inclusive ticket price.....
- Seat reservations available.....
- Flexibility of train times.....
- Other.....

**If you did not travel First Class please continue – if you did please go to Q36**

Q35. Did you consider travelling First Class for this journey?

**Tick one box**

- Yes.....
- No.....

**ALL TO ANSWER**

Q36. How interested would you be in purchasing a National Railcard which, for the cost of £30 up-front, would entitle you to 50% off the cost of all **off-peak** travel?

**Tick one box**

- Very interested.....
- Fairly interested.....
- Neither interested nor uninterested.....
- Fairly uninterested.....
- Very uninterested.....
- Don't know.....

**SECTION 3 – ABOUT YOU**

Finally, to help ensure we hear from a good cross section of train passengers, please can you let us have the following information about yourself.

Q37. What is your age? **Tick one box**

- |            |                          |             |                          |
|------------|--------------------------|-------------|--------------------------|
| 16-25..... | <input type="checkbox"/> | 55-59 ..... | <input type="checkbox"/> |
| 26-34..... | <input type="checkbox"/> | 60-64 ..... | <input type="checkbox"/> |
| 35-44..... | <input type="checkbox"/> | 65-69 ..... | <input type="checkbox"/> |
| 45-54..... | <input type="checkbox"/> | 70plus..... | <input type="checkbox"/> |

Q38. Are you? **Tick one box**

- |            |                          |              |                          |
|------------|--------------------------|--------------|--------------------------|
| Male ..... | <input type="checkbox"/> | Female ..... | <input type="checkbox"/> |
|------------|--------------------------|--------------|--------------------------|

Q39. What is your working status? **Tick one box**

- |                         |                          |                        |                          |
|-------------------------|--------------------------|------------------------|--------------------------|
| Working full time ..... | <input type="checkbox"/> | Retired.....           | <input type="checkbox"/> |
| Working part time.....  | <input type="checkbox"/> | Full time student..... | <input type="checkbox"/> |
| Not working.....        | <input type="checkbox"/> |                        |                          |

Q40. Which of the following best describes the occupation of the main wage earner in your household?

**Tick one box**

- |   |                          |
|---|--------------------------|
| Professional/senior management .....                      | <input type="checkbox"/> |
| Middle management .....                                   | <input type="checkbox"/> |
| Junior management/clerical/supervisory .....              | <input type="checkbox"/> |
| Skilled manual (with qualifications/apprenticeship) ..... | <input type="checkbox"/> |
| Unskilled manual .....                                    | <input type="checkbox"/> |
| Full time student .....                                   | <input type="checkbox"/> |
| Retired .....   | <input type="checkbox"/> |
| Unemployed/between jobs .....                             | <input type="checkbox"/> |
| Housewife/househusband .....                              | <input type="checkbox"/> |
| Other.....  | <input type="checkbox"/> |

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Q41. Which of the following represents your annual household income before tax and National Insurance? We are asking this question because income could influence attitudes toward rail fares.

**Tick one box**

- Under £10,000 .....
- £10,000 to £12,000 .....
- £12,001 to £15,000 .....
- £15,001 to £20,000 .....
- £20,001 to £25,000 .....
- £25,001 to £30,000 .....
- £30,001 to £40,000 .....
- £40,001 to £50,000 .....
- £50,001 to £70,000 .....
- More than £70,000 .....
- Rather not say .....

Q42. Do you have a disability or long term illness related to any of the following?

**Tick all that apply**

- Yes: Mobility .....
- Yes: Wheelchair user .....
- Yes: Hearing .....
- Yes: Eyesight .....
- Yes: Speech impediment .....
- Yes: Learning difficulties .....
- No: None .....

Q43. In which region do you live? **Tick one box**

- |  |   |
|--|---|
| Greater London ..... <input type="checkbox"/>              | Wales ..... <input type="checkbox"/>      |
| South East (outside London) ..... <input type="checkbox"/> | North East ..... <input type="checkbox"/> |
| South West ..... <input type="checkbox"/>                  | North West ..... <input type="checkbox"/> |
| East Midlands ..... <input type="checkbox"/>               | Scotland ..... <input type="checkbox"/>   |
| West Midlands ..... <input type="checkbox"/>               | Eastern ..... <input type="checkbox"/>    |

Q44. Which of the following best describes your ethnicity? **Tick one box**

- |   |  |
|---|--|
| White - British <input type="checkbox"/><br>White - Irish <input type="checkbox"/><br>White - Other <input type="checkbox"/>  | Mixed race -White & Black Caribbean<br>Mixed race -White & Black African<br>Mixed race -White & Asian<br>Mixed race - Other  |
| Asian/Asian British – Indian <input type="checkbox"/><br>Asian/Asian British – Pakistani <input type="checkbox"/><br>Asian/Asian British – Bangladeshi <input type="checkbox"/><br>Asian/Asian British – Other <input type="checkbox"/><br>Chinese <input type="checkbox"/> | Black/Black British - Caribbean <input type="checkbox"/><br>Black/Black British - African <input type="checkbox"/><br>Black/Black British - Other <input type="checkbox"/><br>Other (please write in below) <input type="checkbox"/> |

Q45. Do you own or have regular access to a car which you drive? **Tick one box**

Yes..... No.....

Q46. Do you ever make purchases via the internet? **Tick one box**

Yes..... No.....

Q47. On what day of the week were you handed this questionnaire? **Tick one box**

Monday..... Tuesday.....  
Wednesday..... Thursday.....  
Friday..... Saturday.....  
Sunday.....

Q48. When did you complete this questionnaire? **Tick one box**

On the train immediately after receiving it .....  
Later on the same day .....  
The following day.....  
2-3 days after receiving it.....  
4-5 days after receiving it.....  
Longer period after receiving it.....

When you have completed the questionnaire, please return it to us in the envelope provided or use the following FREEPOST address.

**Passenger Focus  
C/O DIGITAB  
P.O.Box 1349  
London  
W5 1BR**

Should you have any questions with regard to this research, please contact Chris Onley or Martin Fishpool at Outlook Research, on 020 7482 2424. If you have any concerns about the legitimacy of the survey itself then please contact Passenger Focus on 08453 022 022.

**THANK YOU FOR YOUR TIME.  
PLEASE RETURN THIS QUESTIONNAIRE IN THE  
FREEPOST ENVELOPE PROVIDED.**

