



Fares

The Passenger Perspective

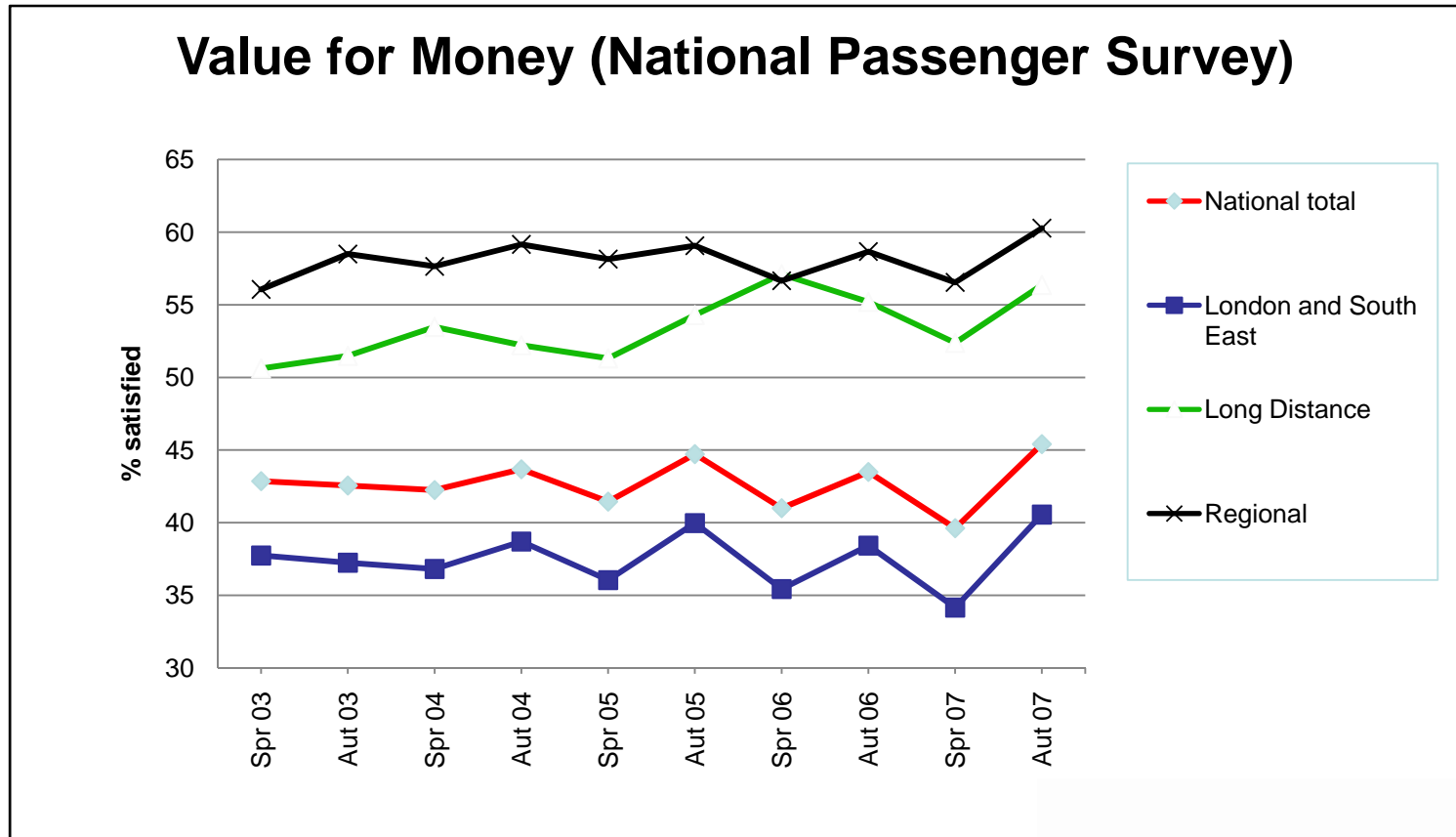
24 April 2008

What do passengers tell us about fares

Three common themes emerge:

- Value for money
- Complexity
- Trust

Value for money



Value for money

Value for money for the price of your ticket				
NPS - Autumn 2007				
	Total	Commuter	Business	Leisure
	%	%	%	%
Satisfied	45	33	46	60
Dissatisfied	32	42	29	21

Value for money

Regulation has provided some protection BUT....

- Transparency

Arbitrary application across different routes within the same TOC. E.g. FGW December 2007 where some regulated fares remained the same, some increased by 4.8% and others by 9.8%

- Disconnect between quality of service and fare increases

Hard for passengers to understand why they can experience a poor level of service and still receive an above average fare increase

- Discounts under Passenger Charter arrangements 'wiped out' by fare increases

Complexity

Passenger requirements from rail fares – July 2006

	Commuters	Leisure	Business
I am confident of being able to find the best value ticket for my journey	50%	48%	36%
I understand the range of tickets and fares available	n/a	44%	34%

Complexity

- Existing fare structure
 - Seen as an obstruction rather than an aid to making an informed choice
- New fare structure – potential benefits:
 - Standard terms and conditions for each ticket type
 - Introduction of common fare names and types across the network (Anytime, Off-peak and Advance)
 - Initial passenger research:
 - New fare names felt to be sensible
 - Felt to have the potential to make choosing the right ticket easier

Trust

- Perception of 'mis-selling'?
 - Am I getting the best deal?
 - Passenger Focus research
- Perception of 'misleading' offers?
 - How many cheap fares actually exist?
- Trust in retailing sources
 - (*Passenger Focus Research July 2006*)

Trust

Trust in Ticket Sources (%)			
	Commuters	Leisure	Business
<i>Ticket office at train station</i>			
Trust entirely	87	88	82
Distrust	5	5	9
<i>Ticket machine at train station</i>			
Trust	48	36	34
Distrust	24	30	33
<i>Internet</i>			
Trust	57	55	68
Distrust	16	19	12
<i>Telephone</i>			
Trust	44	46	54
Distrust	21	25	18



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