



Fairer fares:

the future of rail commuting

August 2020

Summary and recommendations

Transport Focus's research confirms Covid-19 means more working from home and less frequent commuting is here to stay. Part-time working had already been steadily increasing for years, but the pandemic has meant a rapid shift in attitudes to working from home and accelerated changes in work travel patterns. The railway urgently needs a twenty first century retail offer to fit the way people are working now.

Prior to the pandemic fares and retailing reform was high on the agenda as part of the Rail Review recommendations. This was the culmination of a decade or more of research and campaigning by Transport Focus. We know many passengers see the fares structure as complicated, confusing, illogical and expensive. Transport Focus has urged that reform is accelerated and has welcomed news the railway is working on developing and extending availability of 'flexi-season' and 'carnet' tickets.

If designed to meet passengers' needs, they could incentivise passengers to return to commuting by train, while – unlike the unlimited travel offered by a traditional season ticket - also helping to manage demand while social distancing continues to limit capacity. Flexi-seasons and carnets can't solve all the problems with rail fares, but they could be offered quickly and at least begin much needed changes to improve value for money for rail passengers.

[Transport Focus's new research](#) confirms there is a strong appetite for tickets offering savings to those who expect to commute less frequently, but also highlights passengers' needs and concerns as they consider a return to commuting by train.

Transport Focus recommends new 'flexi-seasons' and 'carnets' focus on delivering:

1. **Value for money** – passengers commuting two or three times a week must be clearly better off than if they bought separate 'day tickets' or a traditional season ticket.
2. **Pace of change** - alternatives to season tickets, whether flexi-seasons or carnets, should be rolled out across the rail network as quickly as possible to support and incentivise passengers returning to commuting this year.
3. **Flexibility and duration** – number of days' travel, ticket duration and refund terms should recognise the uncertainty passengers are facing and their need for flexibility.

"I would like to continue a mixture of working from home and travelling into the office as I feel interaction is important however busy working life means working from home a few days a week will ensure more family time. We have shown that my business can function from home as a result of the pandemic."

Male, 35, Wales

Where we work and when we commute has changed

The Covid-19 pandemic meant a sudden stop to commuting to work by train for millions of people. The official UK Government advice to work from home may have ended, but many have not yet returned to commuting and many of those who have are travelling less frequently or using other modes of transport. It's becoming clear that changes in how and where many of us work will be long-lasting.

Transport Focus's weekly [Travel during Covid-19 survey](#) of 2,000 people demonstrates many more now think it's unlikely they'll return to a typical Monday-Friday commute any time soon.

Of those people who commuted by train prior to the pandemic:

- Around two in three expect to continue to work from home more often in the future
- Almost one in two think their job will be homebased with limited travel to their workplace in future.

Feedback from members of our [Transport User Community](#) confirms this shift, they report:

- COVID-19 has demonstrated that home working, desirable even pre-pandemic, is possible and effective.
- Commuters in white-collar professions almost universally expect to work from home permanently, at least for some of the working week.
- Home working allows for a greater work-life balance and better wellbeing overall.
- No longer having to commute has been the one upside during a difficult period faced with anxieties about work, finances and family.
- They see no way for rail to be 'COVID-ready' if passenger numbers quickly returned to pre-pandemic levels and made social distancing impossible.

Rail's value for money challenge

For over a decade now, Transport Focus's research has shown the need to modernise fares and ticketing.

- [Rail Passengers Priorities for Improvement research](#) (July 2020) shows that value for money is the second highest priority for improvement.
- The latest satisfaction results for Spring 2020 [National Rail Passenger Survey](#) show that less than half of passengers are satisfied with value for money, dropping to just one in three commuters.

The traditional season ticket has always been the best value option for those commuters travelling to work by train most days of the week. However, they are only good value if you travel very frequently. Growing part-time working and working from home already meant the demand for alternatives to season tickets has been building and building.

The work-from-home revolution generated by Covid-19 has now given many of these 'captive commuters' an escape route and exacerbates the railway's existing value for money gap. Commuting for work is now seen by many to be inefficient in terms of time and crucially cost.

People working part-time or from home for two or three days a week do not want a traditional season ticket, resenting paying for many more journeys than they plan to make. The high cost of 'Anytime Day Return' fares, the main alternative, acts as a disincentive to rail commuting and offers no recognition people are loyal, regular customers. The new market for commuting two to three days a week now needs tickets deliberately designed to cater to it, rather than making do with tickets set up for a different era. Getting people moving is key to kickstarting the economy, tickets that offer better value for money and reflect the way we commute now will be key to ensuring rail plays its part.

"Changing work patterns will probably result in most of my job being based from home and trips to the office will be too infrequent to make a season ticket financially beneficial."

Monthly ticket,
South Western Railway

"Even when the office reopens I expect I will be going there fewer than 2 days a week. Unfortunately there's no flexible ticket offering for regular part-time travellers."

Previous Northern annual
ticket holder

What alternatives to season tickets are already available?

Some train companies already offer alternatives to season tickets, but not all. Those that are available often offer relatively limited savings and are not always well publicised or easy to purchase. Passengers shouldn't need to know they exist in order to find the best value fares, they must be marketed more effectively and be easy to find and buy.

Improving the availability and savings offered by existing 'flexi-season' and 'carnet' tickets is likely to be the quickest way of improving value for money for commuters returning to work now. Examples of existing more flexible tickets for commuters include:

- [Flexi-season - c2c](#)
A c2c 'Flexi-Season' comes as a bundle of 10 all-day travel tickets offering unlimited journeys that day between your origin and destination station. You've then got 6 months to use the tickets in the bundle. The cost is between the weekly season and the Anytime Return price per journey. If you use the Flexi-Season for off-peak travel on a weekday you get a 10% credit back and more at weekends. The tickets are only available on a smartcard.
- [Carnet - Transport for Wales](#)
A Transport for Wales 'Multiflex' offers 12 Single journey tickets that can be used in either direction between your chosen starting and destination stations. 12 Multiflex journeys cost the same as five Standard Return tickets, saving you the equivalent of one complete round trip. These can only be used via an app and are valid for 12 weeks. This model does not rely on barriered stations or smartcard readers/validators.

Alternatives to season tickets – what do passengers want?

In 2016 Transport Focus published [New types of tickets with smart ticketing: what do passengers think about carnets?](#). This research found that while passenger awareness was low, carnets did hold appeal. Covid-19 has changed the commuting patterns of many of the passengers on our Transport User Community. We asked these passengers from across Great Britain for their views on carnets.

Passengers told us:

- The uncertain future of their commutes, and the possibility of more sporadic or ad-hoc commutes make carnets necessary.
- To be genuinely attractive now the discount needs to be substantial. Ten tickets for the price of nine is seen as ‘reasonable’, but ten for the price of eight is attractive.
- While few can see any downsides to a carnet bundle of singles, which you could use in either direction for your commute, return tickets are what they expect to need for their routine journeys to and from work.
- Given the continuing uncertainty about using public transport, carnets need a long eligibility period, at least initially. Even with a 60 to 90-day validity period our community would be unwilling to purchase more than 10 tickets in a carnet as they evaluate in terms of ‘potential money wasted’.
- While discounts for travelling off-peak are attractive for leisure journeys and feel like the right thing to do to try to reduce peak time crowding, they did not feel this would be useful for their day-to-day journeys, with most expecting their ‘nine to five’ journey times to remain largely unchanged.
- A fair refund policy will be a vital proof-point given the uncertainty of the current situation. They suggest an option to ‘roll-over’ tickets to the next carnet purchased could be another way to help. They recognise that to earn the discount, some commitment would be needed, but expect flexibility during a deeply uncertain period in their lives.

“I’d expect a larger discount to bring people on board with the idea”

Female, 20, Yorkshire and Humber

“It needs to be 90 days for me; with the current climate and talk of a second wave I can’t imagine investing in something which could potentially be of no use

Female, 33, East Midlands

This feedback from passengers on carnets can be applied to flexi-seasons too. While the option of unlimited travel on a given day will appeal to some, as with carnets, passengers will decide whether to buy based on a combination of price, travel days/duration and flexibility. Finding the right balance between the number of tickets (or days' travel) you have to buy, the time you have to use them, and the price will determine the success of these tickets. Price will always be the key component. But, especially in the immediate term, passengers will look for flexibility too and assurances they won't be unfairly penalised if their plans change unexpectedly.

Conclusion

The railway must reflect the way we live and work now – increasingly both at home as well as at our workplaces. As more people gradually return to work in the coming months the railway must ensure it can offer better value for money journeys to attract commuters once again. There's a strong appetite for alternatives to season tickets amongst those who will now commute less frequently. With trains still carrying far fewer passengers than before and capacity limited by social distancing, reform is more urgent than ever.

Transport Focus recommends new flexi-seasons and carnets focus on delivering:

1. **Value for money** – passengers commuting two or three times a week must be clearly better off than if they bought separate tickets on the day or a traditional season ticket.
2. **Pace of change** - alternatives to season tickets, whether flexi-seasons or carnets, should be rolled out across the rail network as quickly as possible to support and incentivise passengers returning to commuting this year.
3. **Flexibility and duration** – number of days' travel, ticket duration and refund terms should recognise the uncertainty passengers are facing and their need for flexibility.

"If I could plan my commute to be off-peak, I would, but I don't think that would give me enough hours to fulfil my role at the bank."

Female, 52, Wales

"If there's a quarantine or enforced lockdown and you have a ticket with no refund, that seems wholly unfair."

Male, 39, Scotland



Transport Focus is the operating name of
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Fleetbank House
2-6 Salisbury Square
London
EC4Y 8JX

0300 123 2350
www.transportfocus.org.uk
info@transportfocus.org.uk

