



Flexi season ticket survey

November 2021

Introduction

What do rail commuters think about the new flexi season ticket introduced in June 2021? To find out we surveyed rail commuters on our Transport User Panel in August 2021.

In November 2020 our [*Rail commuting and flexible season tickets*](#) research asked current and former rail commuters on our Transport User Panel for their views on how frequently they would commute in future and on the appeal of a potential flexi-season ticket. In August 2021, as Covid-19 restrictions ended, we revisited these topics.

In September 2021 we published [*Future rail commuting survey Autumn/Winter 2021*](#) detailing our findings from the survey on commuting frequency. This confirmed that commuters that can work from home still expect to commute much less frequently in the remainder of 2021 than they did before the Covid-19 pandemic.

This new report concerns the views of these commuters - whose work does not require them to physically attend their workplace all the time – on the new flexi season ticket.

Why ask passengers now? The flexi season is still a new product and many rail commuters are still to settle into a new commuting routine. However, it's important for us to gain an early understanding of how this ticket is being received by commuters. It is part of the railway's efforts to encourage commuters to return and to rebuild industry revenues. So, is the flexi season attractive to those planning to commute less frequently? Will commuters use it? What tweaks or changes might improve the ticket or make it more suitable for the way they expect to travel?

This report sets out our findings.

Summary of key findings

- Before March 2020 two in five of those who travelled to and from work by train used an annual season ticket to make these journeys. Less than one in ten say that they expect to use this type of ticket for these journeys in the future.
- For the remainder of 2021, around one in five expect to make journeys to or from work at off-peak times more frequently than they did before March 2020.
- Among transport user panellists awareness of the flexi season ticket is high. Before completing the questionnaire, a half had heard about the flexi season ticket and had considered if it would be suitable for them, while two in five had heard about the ticket but had not looked at the detail. Just one in ten had not heard about the flexi season ticket at all.
- A quarter say that they expect to use a flexi season ticket at least occasionally for the rest of this year to make journeys to and from work, with one in ten saying that they expect to use the flexi season as their main ticket for these journeys. A half say that they do not expect to use a flexi Season at all.
- Three in ten say that the flexi season ticket is an attractive option for them when buying tickets to travel to or from work in the future. Those who expect to travel to and from work for two to three days each week are more likely than others to take this view.
- A 'rollover' option, whereby if another flexi season ticket is bought then any unused day's travel is 'rolled-over' with a further 28 days to use them, is the most popular of several options of possible improvements to the flexi season ticket. An increase to the validity period (with eight weeks rather than four weeks available to use the eight days travel) is also viewed positively compared with other options.

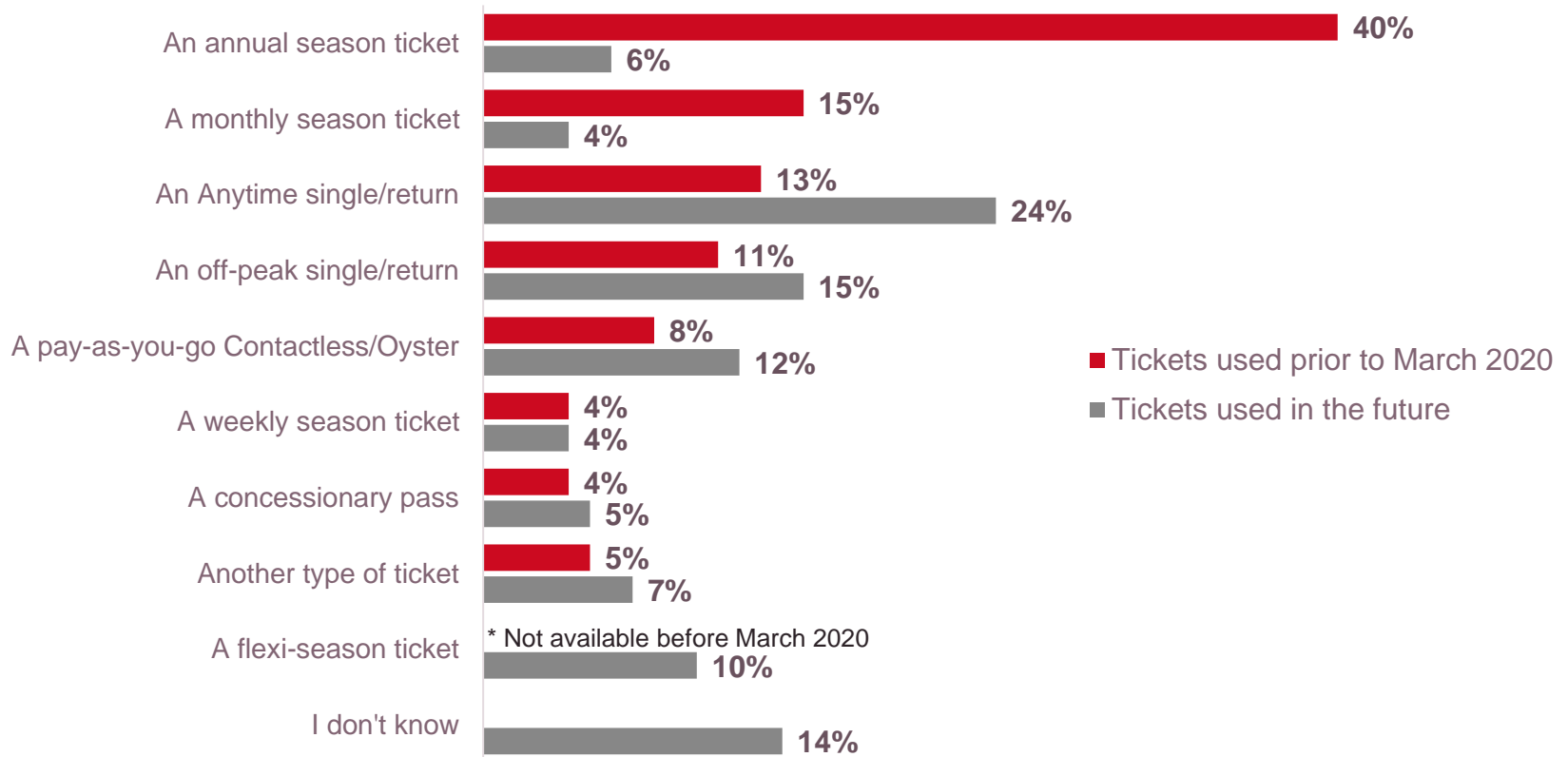
Background and sample definition

- On 18 August 2021 we sent a survey to our Transport User Panel which concerned the degree to which working panellists expected to commute to or from a specific workplace through September and for the rest of 2021. This survey also asked questions relating to the new Flexi Season ticket which was introduced in June. Transport Focus has published the results relating to panellists' future commuting behaviour in a report [*Future rail commuting survey Autumn/Winter 2021*](#). Here we present results which detail panellists' attitudes towards the new Flexi Season ticket.
- When the survey closed on 31 August 3,775 panellists had submitted a response. However, as in the previous publication, the starting point for this report are those respondents who used rail as their main mode of transport to or from work before March 2020, who expect to use rail to make their journeys to or from work for the remainder of 2021. Moreover, this reports focuses on these panellists who live in England, as it is to these panellists that the new flexi season is most likely to be relevant.
- Those who were previously, or are currently retired, or not working and not seeking work were screened-out of the survey. Those who are currently students were also screened-out, while those currently not working but seeking work, or those currently furloughed did answer questions on their expected future commuting behaviour or on the tickets they are likely to use to make journeys.
- In relation to interpretation of the findings in this report, please note that data is unweighted and therefore results should be seen as indicative of this sub-set of commuters rather than statistically representative of them.

Prior to March 2020 40 per cent of those who commuted by rail in the past used an annual season ticket to make these journeys. Six per cent expect to use a ticket of this type in the future.

When you used a train to make journeys to or from work prior to March 2020 (before covid), which type of ticket did you use?

What type of ticket do you expect to use most often to make journeys to or from work in the future?



Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for the rest of 2021 (723)

Comments on why people expect to use the ticket that they say they will in the future

"As I will not be required to be working in the office for as many days in a month."

Flexi season ticket

"With flexible working no need for the annual style season ticket."

Pay-as-you-go contactless/Oyster

"I want to avoid busy times as the trains do not feel safe."

Off-peak single/return

"I will not be going into the office enough to buy a season ticket and if I can work my meetings to go off peak I will. I want to limit the cost of travelling into the office."

Anytime single/return

"There is no need for me to purchase a monthly or annual season ticket anymore as I will reduce the days I need to travel to work by train from 5 days per week to 1 day per week."

Off-peak single/return

"Once work patterns settle down will use this. At the moment using Anytime returns."

Flexi season ticket

"It will most likely work out cheaper than buying a ticket on the day."

Flexi season ticket

"Annual season ticket is too expensive as I'll only travel two days per week. The new flex-season ticket should suit that work pattern."

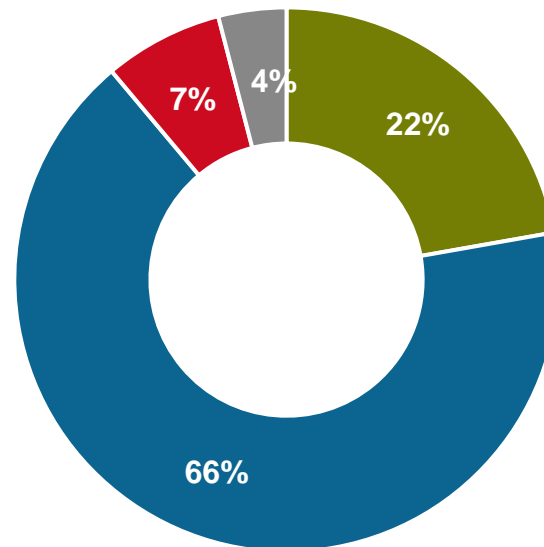
Flexi season ticket

"Because I don't know how often I will need to be in the office I can't anticipate in advance what kind of ticket(s) will be the most economical for me to buy."

Don't know

For the remainder of 2021, around one in five expect to make journeys to or from work at off-peak times more frequently than they did before March 2020

From September and for the rest of 2021, if or when you make journeys to or from work, to what extent do you expect that you will make these journeys at off-peak times (i.e. after 9:30am and before 4:30pm)?



- More often than I did prior to March 2020
- About the same as I did prior to March 2020
- Less often than I did prior to March 2020
- I don't know

Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for the rest of 2021 (723)

Respondents were asked to consider what the new flexi season ticket might offer to them personally

After responding to questions about the types of tickets that they used to make journeys to or from work before March 2020, and about the tickets that they expect to use in the future, respondents were asked specifically about the new flexi season ticket:

The next questions concern 'flexi season' tickets which have recently been introduced for those who may now be commuting less frequently. The flexi season ticket is:

- a bundle of tickets for 8 day's travel, which;
- must be used within 28 days; and
- offers a discount compared with buying 8 separate Anytime Day Return tickets.

To answer the questions in the rest of this questionnaire it would be helpful if you could have a look at what a flexi season might offer you personally. To do this, please follow the link below to the National Rail Enquiries '[Season Ticket Calculator](#)' (which will open in a new window) and then return to this page to complete the rest of this questionnaire.

Season Ticket Calculator

If you are making the same journey twice a week or more, a Season Ticket may be the best value ticket for you. There are several types of Season Ticket that may be suitable for you, all offering unlimited journeys between the stations shown.

Season Ticket Calculator can find the price for your Season Ticket and pass you to a retailer to buy.

Season Ticket Calculator

 Adult Child 16-17 Saver
 Standard First Class

How many days a week do you plan to travel? ?

1 2 3 4 5+

How long do you want to travel for?

1 Year 0 Weeks

Calculate Price

PLEASE NOTE: Not all journeys will have a Flexi Season Ticket and there are other Tickets that can be used for commuting available directly from retailers.

This calculator is currently restricted to the Season Tickets set out in 'Season Tickets' (see right)

Season Tickets

Flexi Season Tickets are valid for 28-days and allow travel on any 8 days within that period. If all 8 days are used before the end of the 28-day period, another Flexi Season Ticket can be purchased at any time which will be valid for a further 28-days.

Customers travelling 3 days per week

If you are travelling 3 days per week, you will need more than one Flexi Season Ticket in a month. Flexi Season Tickets are valid for up to 28 days so any days travel unused can be used in the following calendar month. This is not reflected in the Calculator when a 3 day per week work pattern is selected for an odd number of months (i.e. 1, 3, 5 etc).

For a comparable Price per Day, please select an even (i.e. 2, 4, 6 etc) number of months.

7-Day Season Tickets are valid for any consecutive 7 days and may save money if you are travelling three or more times a week.

A **Monthly Season Ticket** is valid for a full calendar month, and if you need a longer period you can ask for the specific number of months and additional days needed, creating your own **Custom Season Ticket** - all at the same discounted rate

If you are going to be buying Monthly (or equivalent) tickets for 10 months or more, an **Annual Season Ticket** will give you an even bigger saving - valid for a full calendar year, you effectively get 12 weeks' free travel.

Cost per Day

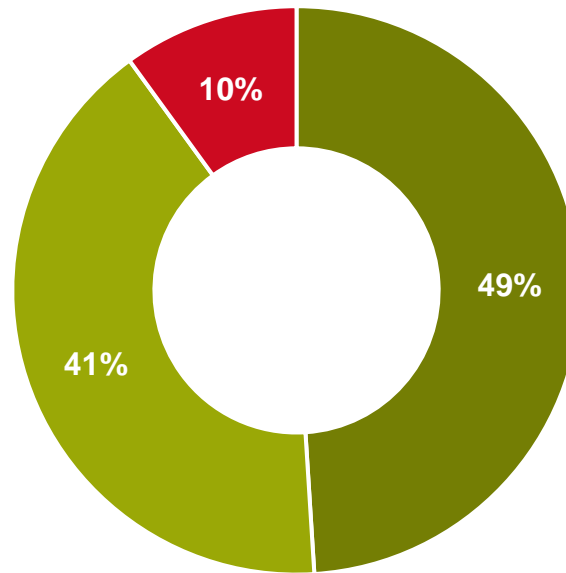
The Season Ticket Calculator can work out on average what the cost per day of travel equates to, based on your answers to how many days per week you plan to travel and how long you need a Season Ticket for. The more you travel, the better value for money a Season Ticket is.

Prices

Season Ticket prices on this calculator reflect current fares. When you buy a Season Ticket you get to travel at the current price for the whole validity of your Season Ticket, regardless of any future price increase during its validity.

A half had heard about the flexi season ticket, and had considered whether it would be suitable to them before responding to the questionnaire, while 41 per cent had heard about the ticket but not looked at the detail.

Which of the following best describes how aware or unaware you were about the flexi-season ticket before today?

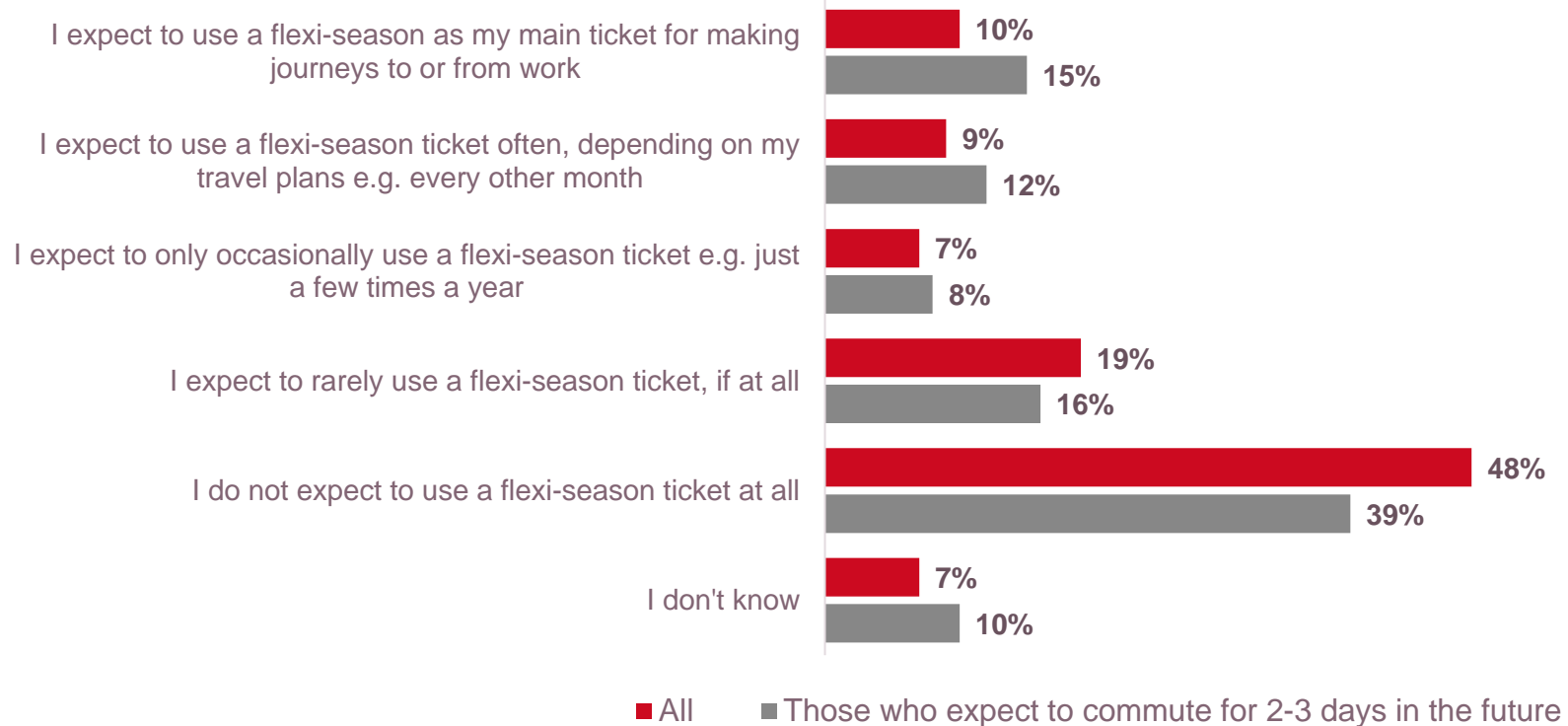


- I had heard about the flexi-season ticket and had considered if it would be suitable for me
- I had heard about the flexi-season ticket, but I had not looked at the detail
- I had not heard about the flexi-season ticket at all

Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for the rest of 2021 (723)

A quarter expect to use a flexi season ticket at least occasionally to make journeys to or from work in the future. More than a third of those who expect to commute for two to three days a week in the future say the same.

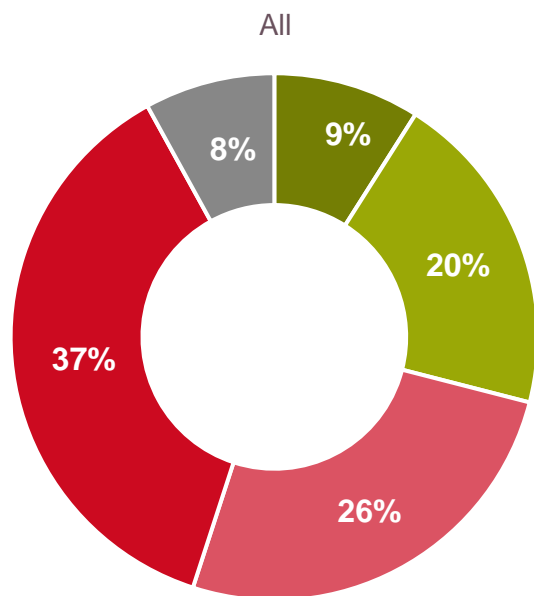
Now you have had a chance to look at the flexi-season ticket, and what it would mean for you, which of the following statements best describes the extent to which you expect to use this ticket to make journeys in the future?



Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for the rest of 2021 (723). Those who expect to commute for 2-3 days a week for September and the rest of 2021 (398)

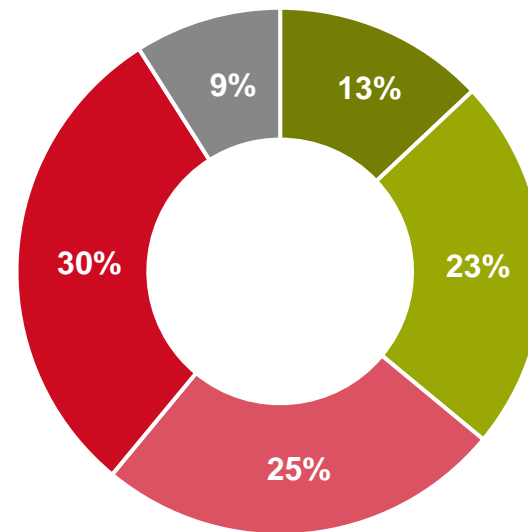
29 per cent say that the flexi season is an attractive option for them when buying tickets to travel to and from work in the future. Those who expect to commute for two to three days a week in the future are more likely to say the same.

How attractive an option would the flexi-season ticket be for you when buying tickets to travel to or from work in the future?



- Very attractive
- Fairly attractive
- Not very attractive
- Not at all attractive
- I don't know

Rail commuters who expect to travel to work 2 or 3 days a week in Autumn / Winter 2021



- Very attractive
- Fairly attractive
- Not very attractive
- Not at all attractive
- I don't know

Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for the rest of 2021 (723). Those who expect to commute for 2-3 days a week for September and the rest of 2021 (398)

Comments on why the flexi season is attractive

“Saves the bother of buying a ticket every day. Gives me flexibility. And it looks like it might save me about £1000! It will vary a lot by how many days I end up going into the office. It's a saving up to 4 days a week over an annual ticket. But I can buy them one season at a time rather than all at once, which is much better for my cash flow and to help me manage changing work practices.”

Very attractive

“When I looked, I was slightly surprised by the cost of the flexible tickets. Compared to buying ordinary "any time" tickets, the saving was fairly small - effectively one free day's travel for every seven paid for.”

Fairly attractive

“Overall the best option but there isn't much saving versus a daily peak ticket. Would be more attractive if they made it cheaper or threw in free weekend travel”

Fairly attractive

“Suits my work patterns and any saving is good to me. It will save me about £30 per month”

Very attractive

Comments on why the flexi season is unattractive

“The ticket meets the flexibility required. It does not offer enough of a financial saving. It would make more sense for me to continue getting an annual season ticket being able to travel 7 days a week (despite now only needing to do so once or twice a week) than getting a flexi-season ticket.”

Not at all attractive

“Not as much saving per trip as the annual season ticket used to offer and I don’t know how often I’ll be travelling.”

Not very attractive

“Because I need to travel more than 8 days in a month.”

Not at all attractive

“It is only flexible with regards to the number of days it can be used, not the time of day it can be used. There should be a flexi season ticket that credits money for using off peak trains.”

Not very attractive

A rollover option where unused day's travel is able to be used in a subsequent 28 day period is the most appealing of several options to improve the flexi season offering

On a scale of 1 to 10 where 1 is 'not at all more appealing' and 10 is 'very much more appealing, please rank the following alternatives according to how much they would increase either the attractiveness or suitability of the flexi-season ticket to you for the commuting you expect to do in the future.

A rollover option – if you buy another flexi season then any unused day's travel 'rollover' with a further 28 days to use them



The validity period is increased – with 56 days (8 weeks) to use the 8 days travel



A 'credit' for travelling off-peak - if you use the Flexi Season ticket outside peak times then your account is credited to reflect you could have used a cheaper Off-Peak ticket. You can use the credit towards the cost of future ticket purchases



The level of discount is increased – with the Flexi-Season costing 10% less than it does currently i.e. If a Flexi Season ticket for 8 days travel on your route currently cost £100, then it would cost £90.



The size of the bundle is decreased – with 5 days travel to use in 28 days.



■ 'Much more appeal' (8-10) ■ 'Some appeal' (4-7) ■ 'Little appeal' (1-3) ■ I don't know

Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail in for the rest of 2021 (723)

Those who expect to commute for two to three days a week in the future are also most likely to favour a rollover option as an alternative to the existing flexi season ticket

On a scale of 1 to 10 where 1 is 'not at all more appealing' and 10 is 'very much more appealing, please rank the following alternatives according to how much they would increase either the attractiveness or suitability of the flexi-season ticket to you for the commuting you expect to do in the future.

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■ 'Much more appeal' (8-10) ■ 'Some appeal' (4-7) ■ 'Little appeal' (1-3) ■ I don't know

Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who expect to commute by rail for 2-3 days a week for the rest of 2021 (398)

Comments on the options provided to improve flexi seasons

"Much longer validity e.g 90 days or more would be the most relevant improvement."

"Flexibility when you had to use the tickets would be good so that if one week you didn't go into the office you wouldn't lose out. Less expensive is always more appealing!"

"For them to be effective the difference in price between this option and the other season ticket options would need to be much reduced. There is no point in spending say £700 on 12 "Flex Tickets" if you can pay say £900 for the year."

"Basically, to be more attractive it needs to offer better savings re standard singles/returns and less complex to understand/use."

"As ever, price is important. Unless the price is reduced significantly, I would not consider purchasing."

"I need to be in my office more than eight days/month. If the flexi ticket remains as is, I will never consider it a viable option for me."

"These options would make the product far more attractive to those who travel rarely and/or off peak."

"A flexible ticket that could be used over a longer period would be really helpful - I'm still finding the balance with the new way of working."

"Anything that rewards loyalty (rollover of unused days) and consideration (travelling off-peak) is a good thing."

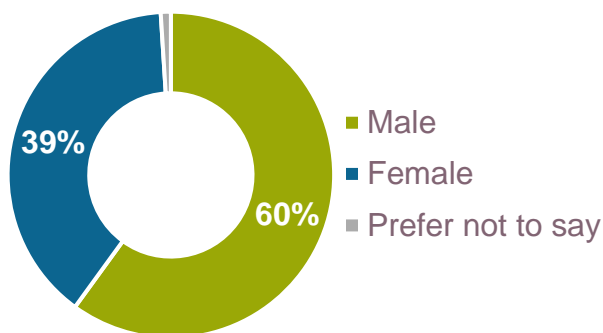
"The current offer meets my specific requirements, so I am not particularly inclined towards any alternatives."

"Certainly a longer time period to use the tickets would make it more attractive to me to consider."

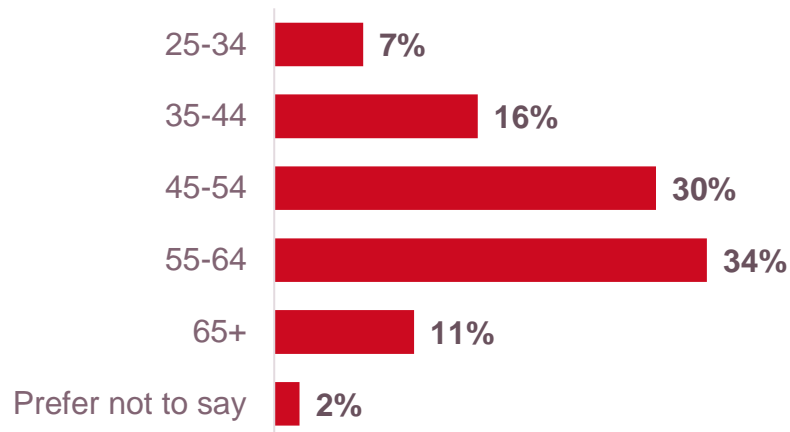
Sample profile

Sample profile – those commuting by rail previously who do not need to physically attend their workplace all the time and who will commute by rail in the future

Gender



Age



Base: Those living in England for whom rail was their main mode of commuting pre March 2020, who do not have to physically attend their workplace all the time, and who will commute by rail for the rest of 2021 (723)