

Shaping Rail's Future: Customer Community

Feedback report: January 2024

**Feedback on
planning and paying for travel**



Shaping Rail's Future: objectives



- ✓ Hear about rail users' – and potential users' – experiences, impressions and opinions of the railway in Britain
- ✓ Understand our strengths and weaknesses, where improvements are needed
- ✓ Involve customers in potential solutions and new ideas to help shape the future of rail

Introducing the customer community

40

Participants with a mix of:

- Rail usage purpose and frequency
- Rail dependency
- Disabilities and not, and other needs e.g. travelling with buggies
- Demographics, lifestyles, attitudes
- Regions and urban, rural or suburban context

Names have been changed throughout this report to protect anonymity



Each month, participants complete activities and answer questions around a particular topic

Via short videos, text, images

Individually, interacting with a moderator, and/or with each other

In addition, two face to face workshops to discuss topics further, generate ideas, and feed back on proposed concepts and solutions



12 months from February 2023



Topic focus in December 2023:

Planning and paying for train journeys

In December 2023 and early January 2024 the community...



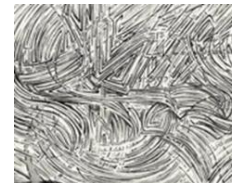
Talked about their **preferences for planning train travel and buying tickets**

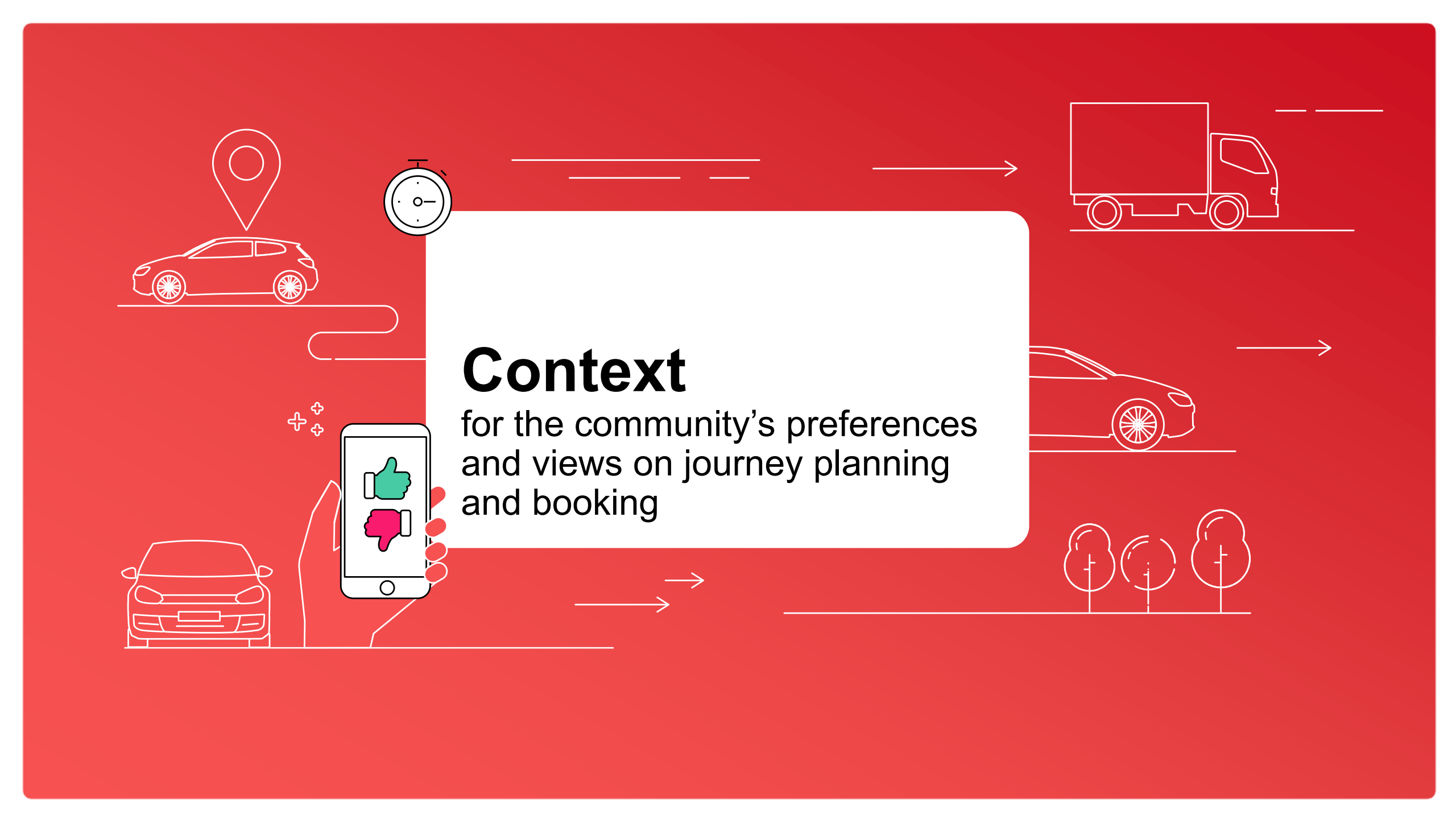


Gave their views **on potential new ways to buy tickets**, including:

- at ticket stops (corner shops, post-offices, supermarkets and other physical but non-rail locations)
- in bundles with other transport, hotels, attractions, etc.

(Updated us on how they feel about travelling by train generally)





Context

for the community's preferences
and views on journey planning
and booking

Context for the community's preferences and views on journey planning and booking

Participants talked about how they plan and book train travel **in the context of journey that they don't make very often, or ever, but which is realistic to them personally**, and something that they could envisage doing. To yield constructive feedback, they were asked to disregard journeys where they would use contactless payment or season tickets for example, and/or where they wouldn't need to engage in much "planning".

Their typical mindset was therefore:



Mostly leisure journeys
(visiting friends, shopping, days out, holidays)

A very small number talked about a business journey



Often relatively long distance, e.g. 2 hours +

Often to major city destinations



Most had at least a rough idea about the route

E.g. which stations to travel to and from, and some rough expectation of whether the journey would be direct, or how long it might take.

c. a third felt confident about where to start with the planning and booking process; only a minority had no idea whatsoever



Most were prepared to put some time and effort in to finding the best deal.

For this, they often placed an emphasis on the lowest price, but usually with some willingness to trade off price vs convenience (e.g. number of changes)



Usually planning as far in advance as possible

This typically meant around a month, meaning the 12-week advance booking convention generally works well for customers. A minority (would have) liked to book further ahead than this (e.g. to book a train to the airport at the same time as booking a flight)

Planning and booking preferences



Without exception, **all community members** would research and pay for this type of journey:

How would you go about planning and buying the ticket(s) for this journey?
(Task 65a)



Aggregator-style services, e.g. Trainline, National Rail Enquiries (or less often, regional transport authority or information provider, e.g. Traveline Scotland)

- To establish and compare which stations are the best start and end points
- To establish and compare possible route / operator options
- Usually used in their own right, for both research and purchase
- Commonly but less often used as a start point before (deliberately) heading to individual operator site to refine the plan and buy the ticket. Where this switch is a deliberate choice*, it often comes from a belief that deals and / or fully comprehensive information are only available direct from the operator, or to avoid booking fees.

** rather than a hand off e.g. by NRE to a specific operator site*

Google maps / search engine

- To compare modes of transport as well as potential routes
- To factor in how to get to and from the start and end stations, and the time / cost this adds to the journey
- For any tips, ideas, watch-outs associated with the journey itself or the destination

Mix of different sites / apps (Google, aggregators, operators, fare-splitting sites, etc.)

- To compare route / start & end point / timing options – with an emphasis on comparing their prices
- Often playing with split fare combinations, different sites' special offers, cash-back or voucher codes, etc.

Direct to operator website

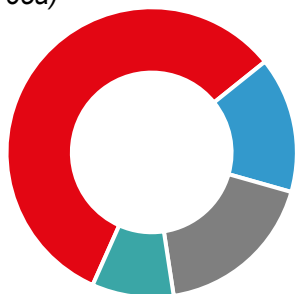
- This usually occurs where the user already knows which operator will carry their journey, and where there is some pre-existing trust that an operator will have better (cheaper) pricing options and / or a more comprehensive set of ticket / timetable options, including without booking fees
- (One participant goes direct to their operator via Facebook Messenger, seeking more personalised advice)

Base: community participants (35)

This type of research does not provide a robust, quantitative assessment of planning and booking behaviours; rather, the donut graph is intended to give a qualitative indication of the proportion of participants that would use each type of website / app as their first port of call.

Some further insights around these online behaviours

How would you go about planning and buying the ticket(s) for this journey?
(Task 65a)



Aggregator services
(Trainline, NRE)

Google maps /
search engine

Mix of multiple
sites / apps

Operator direct

There are no strong differences in the use of website / app types, among different rail user segments.

However, some loose patterns are:



Exclusive reliance on aggregator sites (i.e. planning and purchasing here without other research elsewhere) is associated with those who are:

- Willing to put in some, but not limitless, effort – implying these services work well to provide a good balance between range of options, and convenient UX
- Less experienced train users overall – implying they also work well as a good route in to a potentially unfamiliar journey



Using a mix of different sites / apps, and/or starting with an aggregator before funnelling to a specific operator site, is more likely:

- Among those who feel confident with train travel research, and more experienced with train travel generally
- Among older rail users (those in their 20s and early 30s less likely than older travellers to shop around)



Google / Google maps favoured by younger people (<60)

The majority of participants do their research and then purchase tickets as one combined task – though as above some will use certain types of website for research, and others for the purchase transaction.

A minority like to “sleep on it”, but still go back to a website / app to make the purchase.

(Shorter, familiar, lower stakes journeys can be different, with purchase en route to or at the station, or with an Oyster card or similar)

“

If am going on long journey I would buy in advance as it's cheaper but if it's not a far journey I would just buy on the day. I buy online as it's cheaper usually and there is more information, whereas on short day journey I usually buy at the station as there is not much difference in price and usually less delays

Katherine, commuter, suburban

”

“

I have my phone and I rely on using my phone for tickets [even if it's last minute].

Martin, commuter, suburban

”

“

[I might purchase at the station for] short commuting journeys where I'm not bothered about options. For example my local station (Whitecraigs) to Glasgow Central takes twenty minutes, and there are two trains per hour, so I just want a ticket for the next train.

Simon, business, suburban

”

“

There is a difference if travelling for work or leisure. To book for work I would turn up at the ticket desk on the day and buy from the counter, or machine ...For leisure I would go to RedSpottedHanky to look for a better deal on tickets...

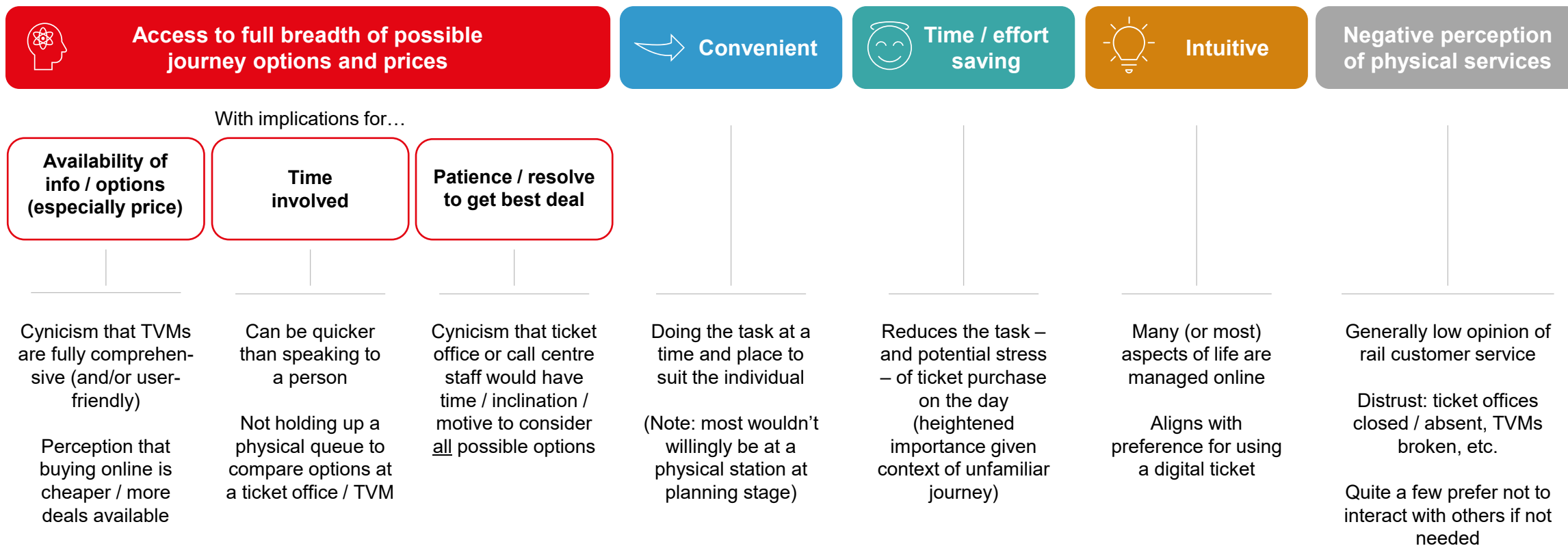
For work: less time and effort or worry about cost. For leisure: lots of time and effort to get best price.

Riz, leisure / business, suburban

”

These rail users see several benefits in planning and paying for travel online (rather than in a physical location)

In approximate order of importance →



A flavour of participants' rationale for planning and purchasing online



Access to full breadth of possible journey options and prices

Researching online ...I can have several windows open ...each showing options for timing and price. Going to a ticket office doesn't really offer any advantage, and also if there is a queue behind, I don't like to hold up the queue while I deliberate

Simon, business, suburban

You can mess around with the dates/times to find a cheaper or faster train.

Claire, leisure, suburban

I believe Trainline shows the cheapest options available ... It also saves me time as I always have access to my phone to look for tickets.

Alice, leisure, urban

...I like to get all the data together then sleep on it and book the next day. I wouldn't want to keep going back to a station to discuss it.

Stuart, commuter, suburban

I like to be in control of the process and do my own research ...in my own time. I prefer to think about the options and obtain the cheapest price. I find this easier to do online.

Clive, business, rural



Convenient

I see this as the most simple and efficient way to go about it.

Anna, commuter, urban

It is simple to use and the most convenient in this technology era.

Martin, commuter, urban



Time / effort saving

I would plan far in advance mainly due to me always needing to plan and know what I am doing. I feel stressed out otherwise.

Michelle, leisure, suburban

I have the ticket before I get to the station. I do not have to waste time at the station buying them ...[and] I have an extra 5 or 10 mins to play with if I'm in a hurry on the morning of the journey.

Julie, leisure, urban

Makes it easier and simple so you can just jump on the train when it arrives.

Caleb, leisure, suburban



Intuitive

I am used to doing everything online ... [and] I can book it in the comfort of my home and in my own time.

Sarah, leisure, urban

I don't want paper tickets - don't like the waste, [and] easy to have on my phone - [so why buy at a physical location]

Tracy, leisure, urban

Negative perception of physical services

....I would always trust myself to find the best deal rather than trust somebody else to do it on my behalf.

John, leisure / business, rural

I wouldn't go to a ticket office as there isn't one at my station and sometimes the machines are broken. It seems pointless going to use a machine...

Rachel, business, rural

All ...online as it's difficult to speak to any customer services staff now.

Julie, leisure, urban

On occasion I have [used] a ticket office, but there is always the pressure of other people waiting, and the possibility that the clerk does not offer the best price.

Fiona, leisure, suburban

Some further insights on the benefits and utility of online planning and purchasing services



Access to full breadth of possible journey options and prices



Convenient



Time / effort saving



Intuitive

Negative perception of physical services

With implications for...

Availability of info / options (esp. price)

Time involved

Patience / resolve to get best deal

Again, there are few clear differences in the perceived benefits of planning and paying for rail travel online, among different segments. However, some loose patterns are:



Wanting to have access to a **wide range of different (price) options** is especially important to **older rail travellers** (>30/40)



Convenience, both in advance, and to save any hassle on the day, is the **priority for younger customers** (providing price options are clear and it is easy to access the cheapest fares)



Wanting to be fully prepared, and remove time and stress involved with the ticket purchase “task” on the day of travel, is important to **less experienced rail users**

In addition:



Some of this desire to consider lots of information and options is driven by customers' **perception of complexity in the system** (lots of operators, lots of different ticketing options), and is felt to be **a task they need to do, rather than choose to do**

There is appetite – and expectation – to take online capabilities even further here, e.g. with a “Skyscanner equivalent” that allows, for example, for a range of possible start/end stations, and date flexibility, etc. all in one place

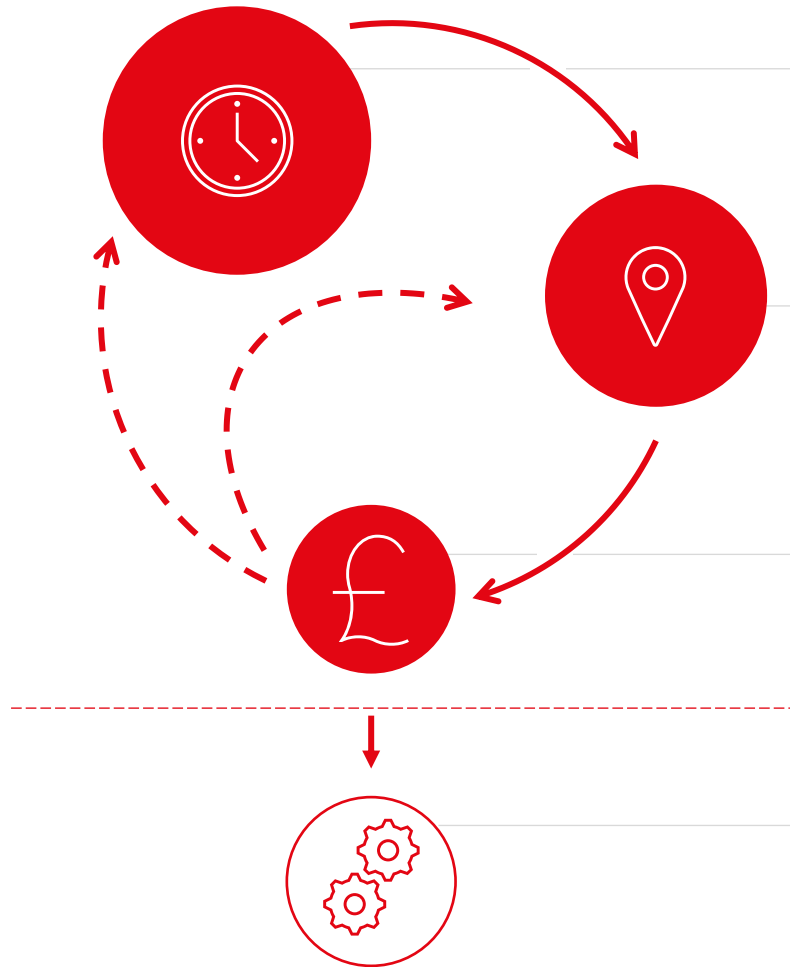
“

There are different routes at different prices with different operators... no standardisation of ticketing across the rail companies ...[It is] time consuming to work out whether... to start your journey - for ticketing purposes - from a mainline terminus, or a boundary station, and which company

”

Fiona, 60s, leisure, suburban

Information needs when considering options for a train journey



First, most people want to understand the **times of trains** that will be potentially relevant to them – including both the departure time and the duration

A close second priority (or first priority for some) are the **logistical details** – where exactly to start and end, how to get there, whether or not there are changes

Price is key and often drives people to go back and review different options for the above, but is typically the third thing they pay attention to

Other considerations, once the fundamentals are established and narrowed down, are:

Seating options
incl. ability to reserve

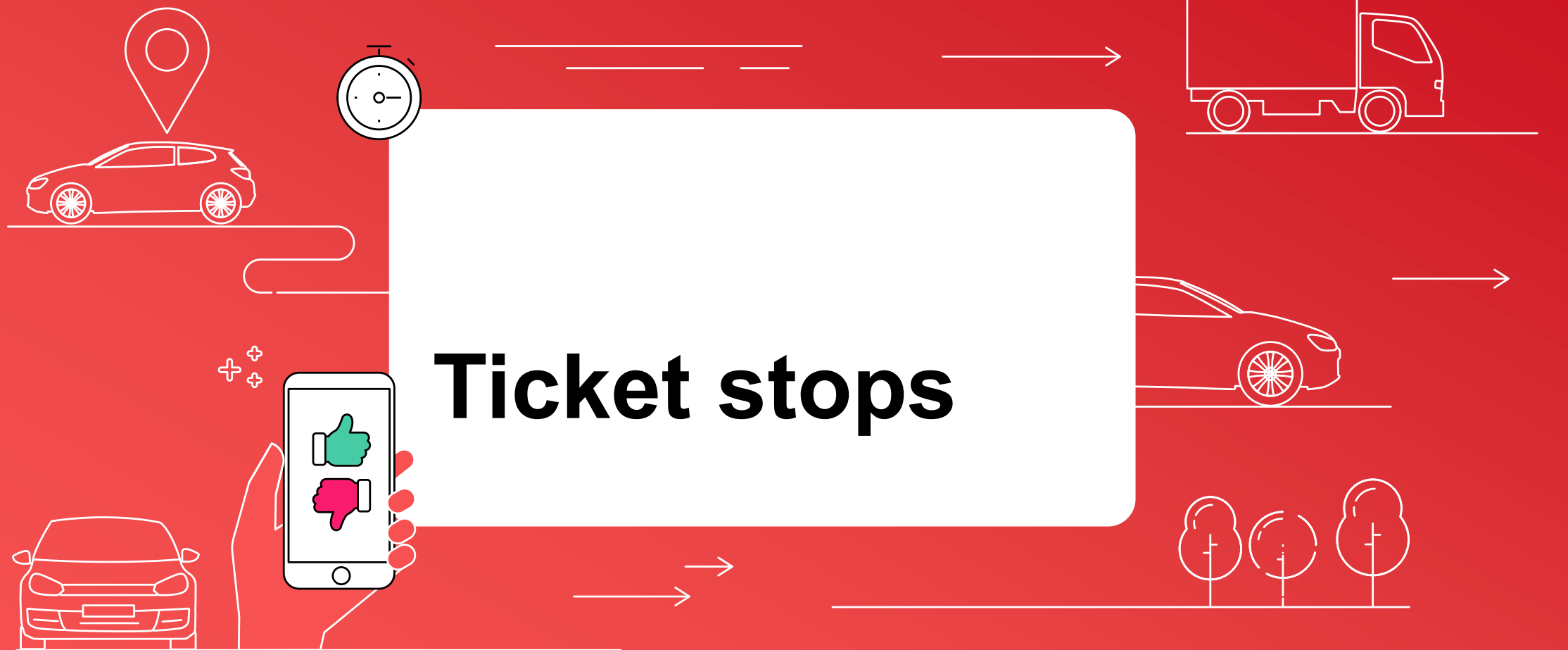
Other **facilities** on
board

Disruption

Those needing **special assistance** find their train first and then arrange this, though they may also pay more attention to the location and travel to/from their start/end/interchange stations

No apparent differences in information needs, among different rail user segments

Ticket stops



“

There's already this service available at the railway station or online so there's no need to do it elsewhere... we need to focus on bigger things that make a difference

”

Alice, 20s, leisure, urban

In the context of typical journey planning requirements and existing behaviours:

Summary of journey planning / ticket purchasing context



Longer distance, leisure journeys



For which customers often plan in advance and are willing to engage in searching for a good deal



....comparing timings, routes and prices, and how these factors interplay

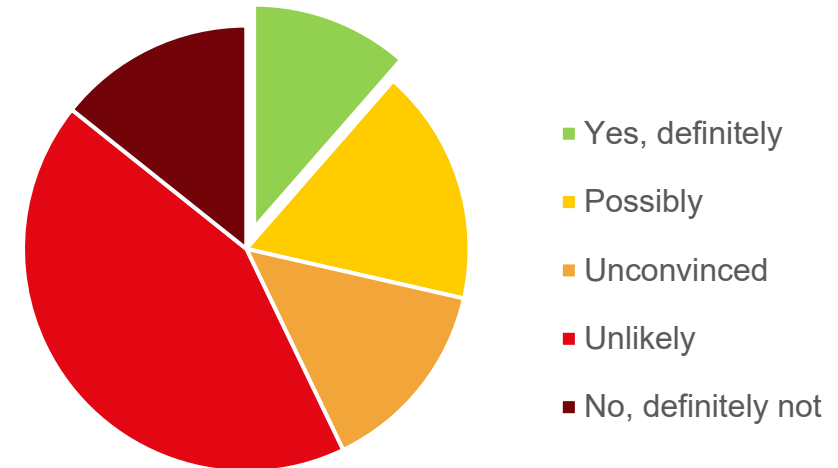
(in a complex network and across a very complex array of ticket options)



Where online tools facilitate this and are comprehensive, convenient, intuitive

...very few see a genuine benefit to purchasing tickets via physical, non-rail retail locations

Likelihood of using non-rail ticket outlets (Task 66b)



Many of these qualify their response with a variety of caveats, or see usage of this type of service as very limited, either to certain types of journey, or to certain types of rail user (not themselves)

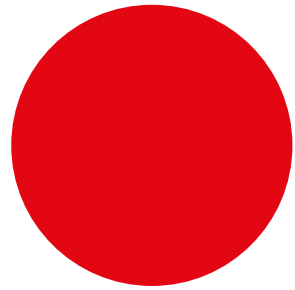
Base: community participants (35)

This type of research does not provide a robust, quantitative assessment of planning and booking behaviours; rather, the pie chart is intended to give a qualitative indication of the proportion of participants that say they would consider using a service like this

Response to ticket stop concept was more negative than positive, with most feeling it lacks value over planning and paying for travel online or at a station, and / or staff expertise

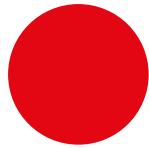
Themes in participants' reactions to the concept of ticketing services in non-rail, physical locations

Bubble sizes provide a qualitative indication of the relative frequency with which each of these themes arise



Redundant:

Online / at station
services fulfil needs



Cynicism
around **staff**
knowledge /
capacity



Concerns
about
queues / time



Convenient
additional
option



Potential role
for **limited**
occasions



Potential role
for **limited**
audience

The negative reactions highlight some significant barriers to using such a service

Redundant

Online / at station services fulfil needs

I find it easier online. I ...rarely go to the supermarket, post office etc. (I have shopping delivered)

Claire, leisure, suburban

It is only appealing if it is for tickets on that day and you want ...a physical ticket. Personally ...it is just as easy to order online and download the ticket to your phone or ...collect at the ...station.

Clive, business, rural

...a shop assistant would ...presumably just be doing the online booking for me, where are they adding value?

Stuart, commuter, suburban



...and potentially seen **poor use of resource**

...we should be moving towards online tickets to reduce waste.

*And ...if it was to be implemented a lot of potential issues could arise too, which would mean **even more time and resources are having to be spent on a service we don't actually need.***

Alice, leisure, urban

I'm not averse to this... for people who aren't comfortable with phones / internet, but it does seem slightly retrogressive in this regard.

Wouldn't it be better to focus on improving / simplifying the online purchasing process?

John, leisure / business, rural

Cynicism around **staff knowledge / capacity**

My local ticket office is very convenient and the staff are trained for the purpose... I have [used] 'alternative' sources in other countries and the people involved did not see the ticketing/travel information as their main priority and so the service was inadequate.

Gavin, leisure, urban

...in practice those places ...don't have the knowledge... let alone deal with issues or edge cases. I remember when West Yorkshire's multi-modal passes became available through retail outlets, their cost to passengers went up and customer service went down.

Oliver, business, suburban

...they would not have the knowledge needed to sell me the right ticket. While its easy to buy a weekly travel card from them I think anything more I would be better off looking online and checking myself.

Julie, leisure, urban

...would [they] know all the same information ... Would they know about delays and connections, etc

Katherine, commuting, suburban

Concerns about **queues / time**

I cannot see the necessity. My local station is not too far away. In any case I would not want to be in a shop queue ...waiting to be served in connection to tickets.

Riz, business / leisure, urban

...at a post office I might be queueing to post a parcel, but if the person in front is weighing up several options for a train ticket, then dithering over which seat to reserve, I would be very frustrated by the delay.

Simon, business, suburban

Where use-cases are recognised, they are fairly limited in nature

Convenience benefit for a minority

I would use it if I wasn't going to a station anytime soon, e.g. if it was at the supermarket where I go regularly it would be convenient to pick up tickets there vs going to a station to do this.

Jay, commuter, suburban

For short journeys, it would mean I can buy a coffee and train ticket at the same time!!

Cerys, commuter, suburban

Very straightforward journeys

Quick / journeys that I'm familiar with might be ok for this [and] if you could pay using loyalty or reward (Clubcard/Nectar)...

Joshua, commuter / leisure, rural

If the journey was one that I am well acquainted with, I would use this facility, but if I had any queries or needed some detailed information I would not.

Mark, leisure, suburban

...or collection only

If I want to collect my tickets a few days before ...and I'm not going to pass my local station....

Mike, leisure, urban

Other isolated (atypical and infrequent) occasions

...it's a good idea, especially for older people... I would definitely buy online as my first choice, but I would use this as an emergency option

Anna, commuter, suburban

It would be useful to an extent, such as in situations where I need a train ticket last minute and I'm nearby a ticket point. But I could still do this on my phone... The only time I would use [this] is if my phone is low [on battery]

Martin, commuter, urban

I can only envisage myself purchasing tickets this way if it were a last-minute journey, or if my phone were dead, or as some kind of 'tourist' journey (perhaps where I'd like the ticket as a souvenir, etc.)

John, leisure / business, rural

In specific communities / rail user audiences

...most things are simpler online [but] I guess this would be useful for ...people who can't access the internet

Caleb, leisure, suburban

I think it's a really good idea. In my village, the station has no ticket office, but we have a post office and a few shops. There are lots of elderly people who may not be able to buy tickets online or feel confident enough to use a ticket machine

Rachel, business, rural



Feedback suggests that **there may be some appetite for a more bespoke ticket service in certain locations / situations**, but this would likely require development towards a much **more specific purpose**, and additional, **dedicated market research with the relevant audience** to assess product requirements as well as viability

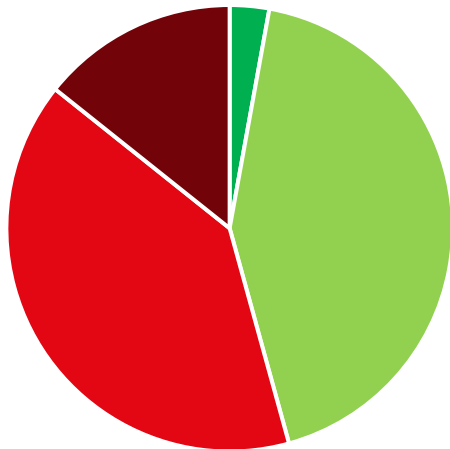


Unlikely to become a habit or a front-of-mind option

These participants see a **role for TVMs within non-rail retail locations (rather than a staff interaction)** – though in this context, many also have concerns about the benefit of this over machines at stations

Participants in this community had a similar overall reaction to the idea of arranging other related services via non-rail locations and retailers

Likelihood of using non-rail ticket outlets for other actions like reserving seats, buying railcards, applying for refunds, etc.
(Task 66d)



- Yes, definitely
- Possibly
- Unlikely
- No, definitely not

Base: community participants (35)

This type of research does not provide a robust, quantitative assessment of planning and booking behaviours; rather, the pie chart is intended to give a qualitative indication of the proportion of participants that say they would consider using a service like this



A possible role for these outlets in **more standardised transactions, especially for travel cards and railcards**

(Partly because there is some precedent for these)

I think other retailers have their limits. Weekly travel cards or bus passes are easily sold by them as there are standard tariffs and no further knowledge is required. I think for a rail journey they would need a lot more knowledge and would not be interested in finding out.

Julie, leisure, urban

Railcards yes as they are generic and I used to buy my bus pass in the shop years ago and that seemed to work ok

Neville, business, suburban



But for **refunds, seat reservations and other journey-specific services**, customers want to know they are dealing with the full information available, or a fully informed person

[For the same reason as] I would not expect the retailer to be able to provide any customer service if I was topping up a mobile phone or paying a utility bill. The retailer at most will know most options for taking payment ...but I doubt they would know anything about the many different companies their payment terminals take payments on behalf of.

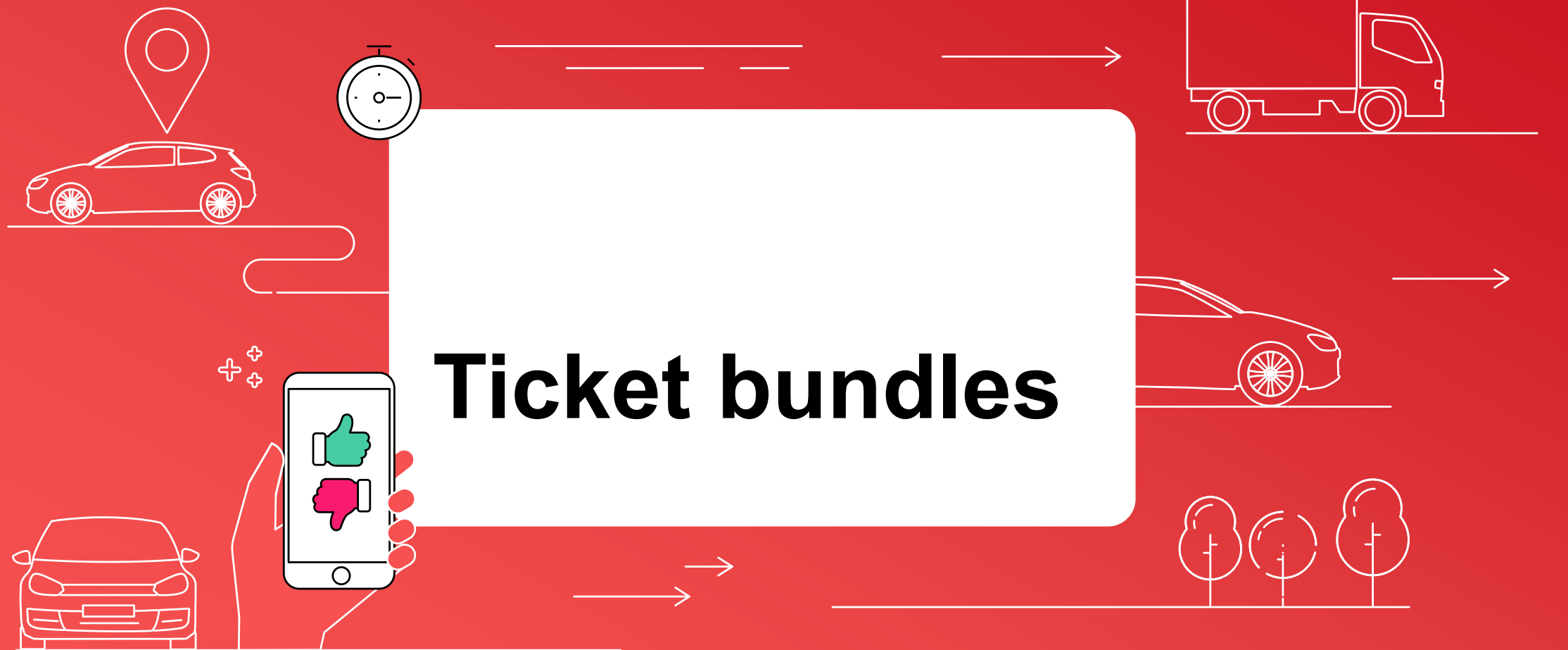
Oliver, business, suburban

...making online services or a member of railway staff not only preferable, but essential

Trainline offers all these features and I use my phone a lot so I would do all of this on my phone

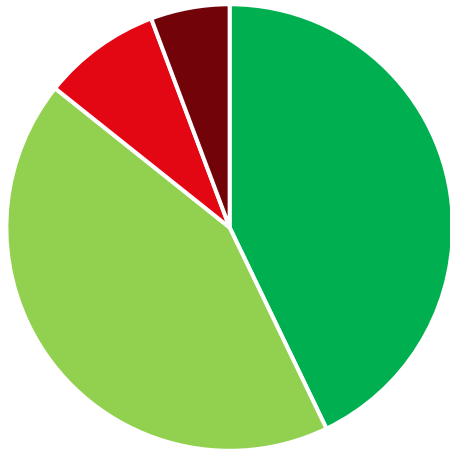
Martin, commuter, urban

Ticket bundles



Rail users were much more enthusiastic about purchasing combined tickets for rail + other services, especially other transport

Likelihood of purchasing rail tickets in a bundle with other transport, or other services like attractions, events, accommodation
(Task 67)



- Yes, definitely
- Possibly
- Unlikely
- No, definitely not

Base: community participants (35)

This type of research does not provide a robust, quantitative assessment of planning and booking behaviours; rather, the pie chart is intended to give a qualitative indication of the proportion of participants that say they would consider purchasing combined-service tickets like this



Key assumed benefits are:

Convenience

I would be really convenient to arrange ferry transport along with train tickets for future holidays, to have everything sorted in one place and through one website rather than having to deal with lots of different providers.

Becca, business, suburban

It would be very easy to book everything all in one go especially combining flights and onward travel. This would be really useful as you would pay for everything in advance and know exactly how you would get to your destination.

Clive, business, rural

Pricing

I would if it made it cheaper, for example if they had a deal that you could get 10% off

Claire, leisure, suburban

I would also expect it to be the most economical way of purchasing (discount based on advanced and multiple purchases), otherwise I would not be interested.

John, leisure / business, rural



Some are concerned about:

- Inflexibility of tickets once they are booked
- What happens in case of disruption to one of the components

People expect or assume that they would go....



Online

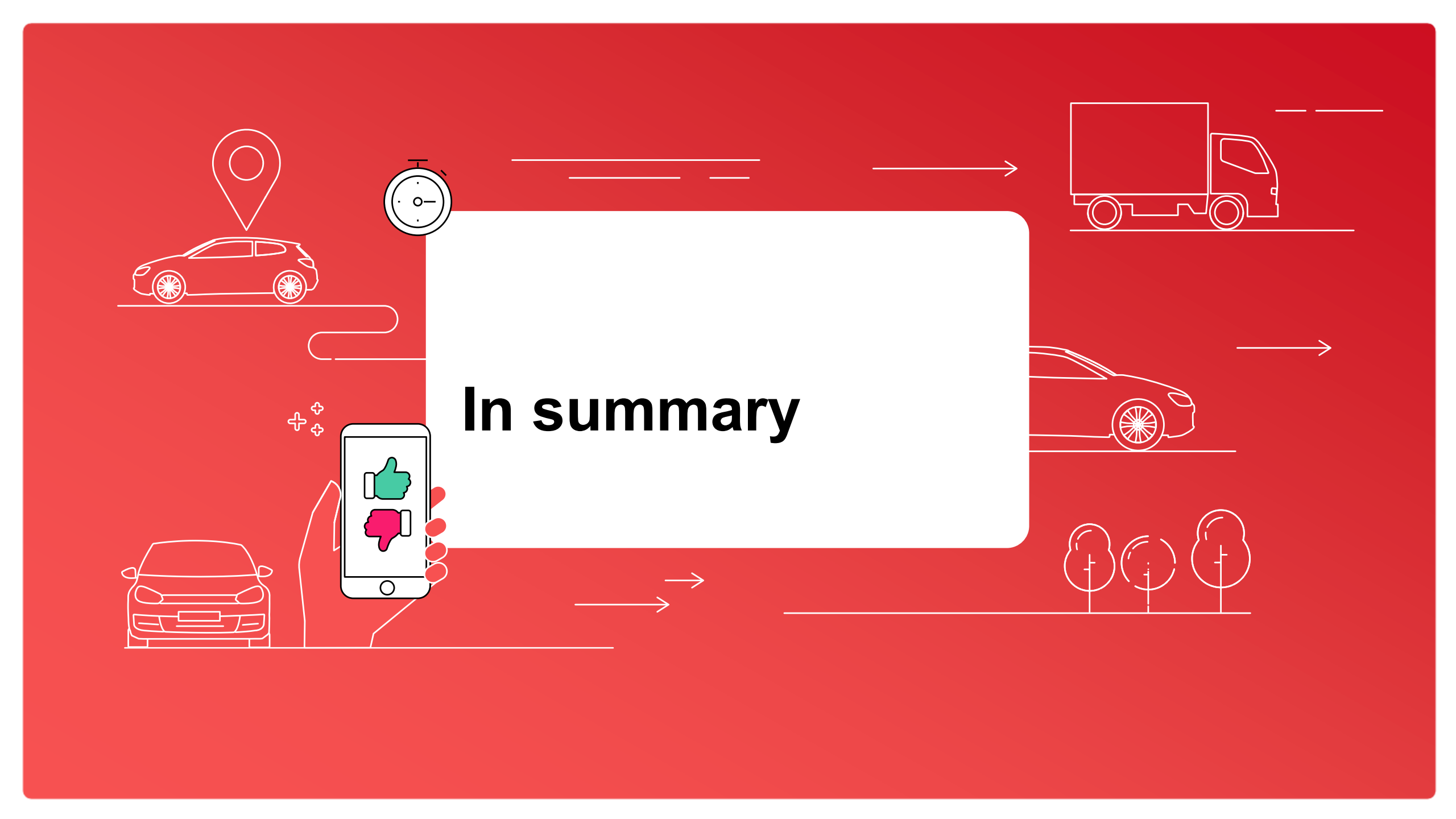
- ✓ Travel / leisure websites, e.g. Expedia, Booking.com, Virgin Experiences
- ✓ National Rail Enquires / Trainline
- ✓ (Direct to train operators, for locally-relevant onward transport or attractions, etc.)
- ✓ Attraction / venue



Railway station ticket offices

It would need to be a brand / name I know and trust

Rachel, business, rural



In summary

Summary

This research sought to understand how rail users plan and pay for train travel, and within this context, to evaluate potential new ideas for ticket services.

In thinking about planning train journeys, the community focused on journeys which they don't make all of the time, and for which they would need to purchase a ticket (rather than use a travel card or contactless, for example). Their **feedback was therefore largely based on planning and paying for longer distance, leisure journeys, which would be typically researched and booked in advance**

This community of rail users would, universally, plan and pay for journeys like this online – mostly using aggregator-style services like Trainline or National Rail Enquiries, though other sites and apps are also used

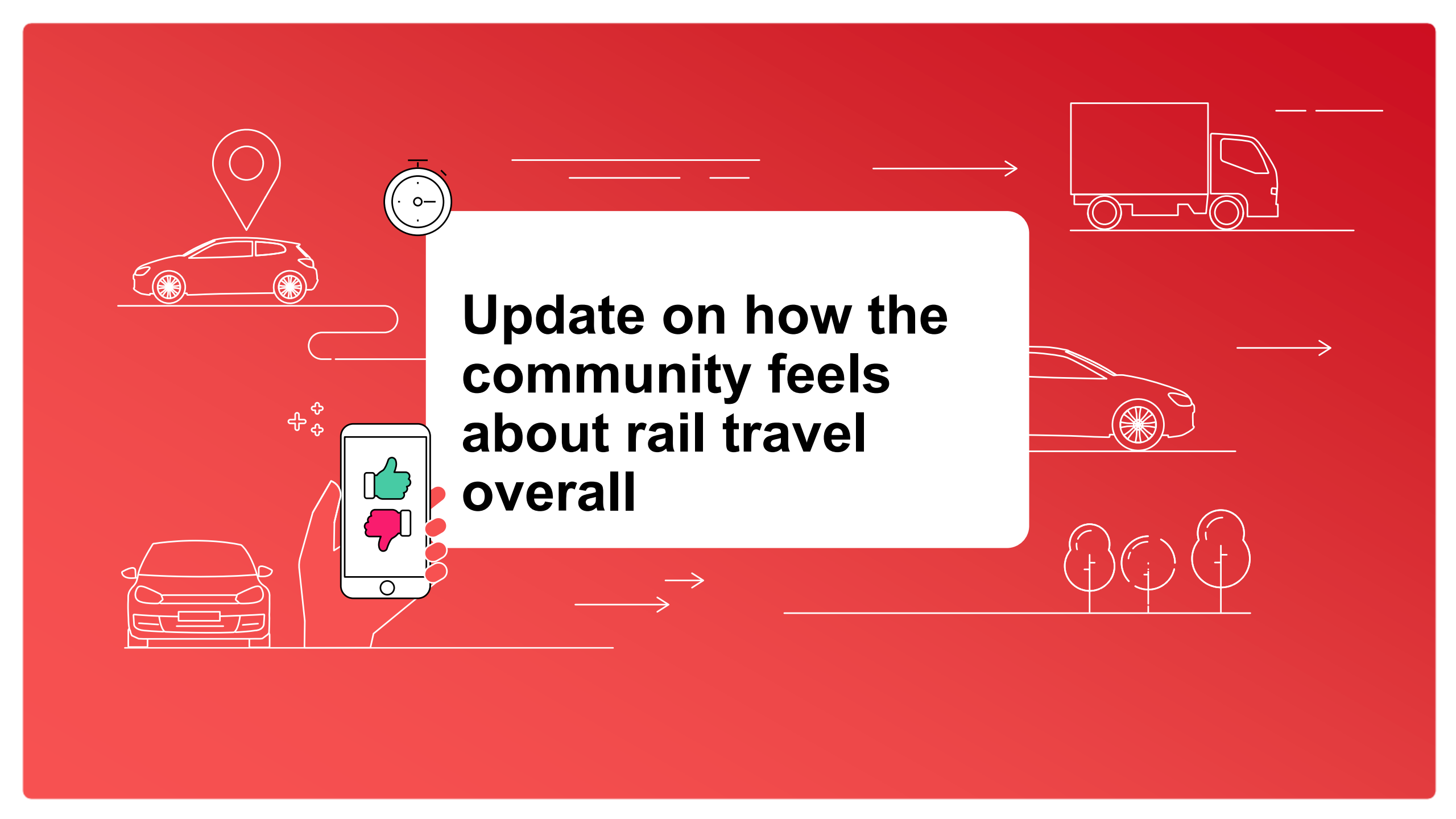
Their main reason for this is **so that they can consider multiple possible journey options** – prioritising different possible timings and routes, for different prices, and usually **with an emphasis on finding the cheapest price** for the services relevant to them. **Online services are often seen as the only suitable and effective way to make these often complex comparisons.**

Convenience / comfort, being able to organize a ticket in advance (to avoid time and stress on the day), the prevalence of online services in other aspects of daily life, and negative perceptions of customer service and reliability of at-station services, are also all important

In this context, the concept of ticket stops – being able to plan and/or purchase rail travel at other sites such as supermarkets, corner shops, post offices and others – **felt largely redundant**, and relatively few in this community of rail users could see themselves using them except in very isolated circumstances

They did see a potential role for ticket stops to serve customer segments who are not comfortable online, or for more standardised purchase transactions such as railcards. However, it is not clear from this research whether the idea would be viable if it was limited to these more specific uses

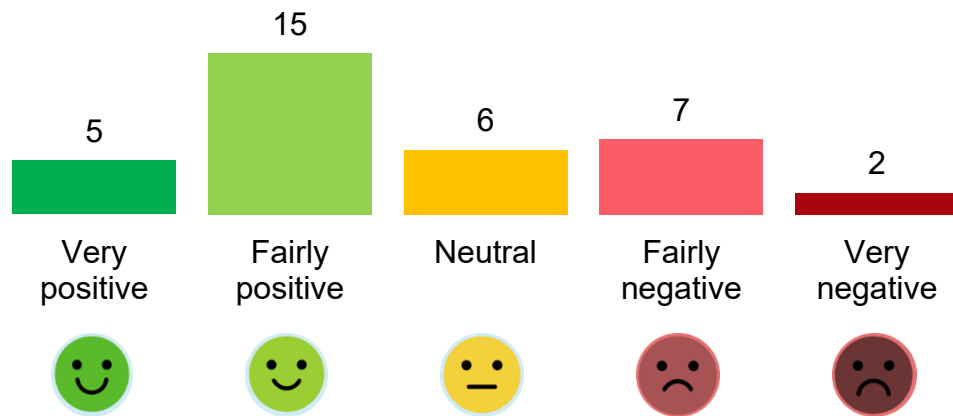
These rail users were, however, **enthusiastic about the potential to purchase combined tickets for rail and other services** – including other transport, accommodation, attraction, etc. This idea appeals if it can reduce the time and effort of planning, storing and using tickets, by managing them all in one place, and on the assumption that it would also enable discounts for cheaper travel overall



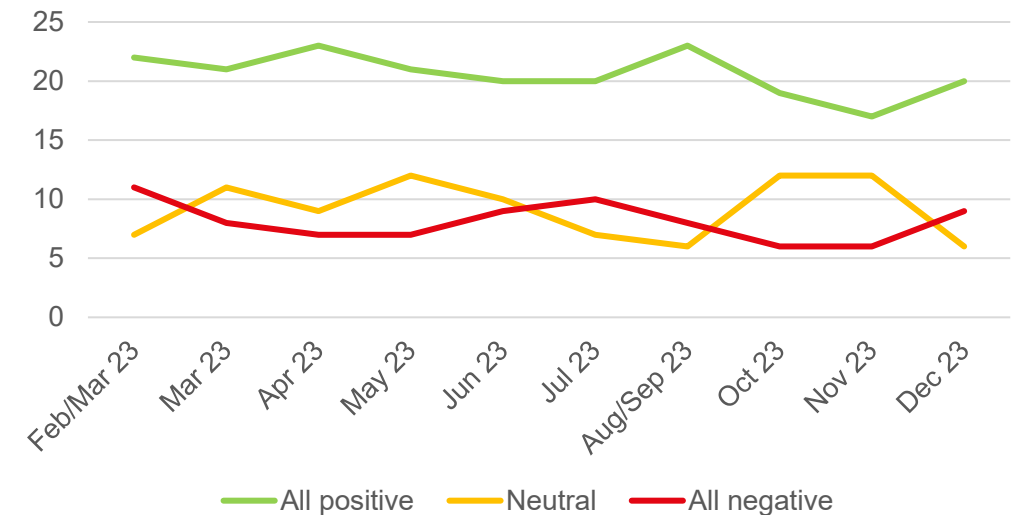
Update on how the community feels about rail travel overall

Sentiment towards the railways has worsened slightly over the last year overall among this group of rail users

How you feel about travelling by train at the moment: A snapshot
(Task 64)



Trend so far



Participants are more likely to be positive when they....

- Typically travel for leisure, rather than work reasons (with regular commuters in particular being less positive overall)
- Live in more urban areas
- Do not have a disability or other health condition

Base: all community participants, Dec 2023/Jan 2024 (35); figures shown are absolute number of people

About Transport Focus

Transport Focus is the independent consumer organisation representing the interests of:



Bus, coach and tram users across England outside London.



Rail passengers in Great Britain.



All users of England's motorways and major 'A' roads (the Strategic Road Network).

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Transport Focus is the operating name of the Passengers' Council

We work to make a difference for all transport users.