

Shaping Rail's Future:

Customer Community 2024-25

Value for money &
encouraging greater rail use

January 2025

The Customer Community: 2024-25

Following the successful community insight programme which ran from February 2023 to April 2024, this is the second community of rail users brought together by Transport Focus and Great British Railways Transition Team to help inform the future of rail travel in Britain



A unique vehicle for engagement

- ✓ Hear users' experiences and opinions of rail travel in Britain
- ✓ Identify strengths, weaknesses, and improvements
- ✓ Involve customers in potential solutions and new ideas to help shape the future of rail



Topic focus in December 2024:

Exploring triggers & barriers to rail use, and attitudes to and impact of value for money



40 rail users

representing
diverse needs &
experiences



12 months
from July 2024



Using flexible, engaging research methods

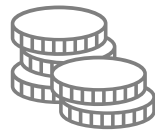
- ✓ Online research platform for continuous interaction
 - Feedback on a given topic each month
 - Via activities using video, text, images, polls
 - Participants work individually, interacting with a moderator, and each other
- ✓ Face to face workshops to discuss topics further, generate ideas, and explore proposed concepts

All names in this report have been changed for anonymity

In December 2024 the community...



Gave us an overview of the **reasons they do and don't use the train** for different types of journey



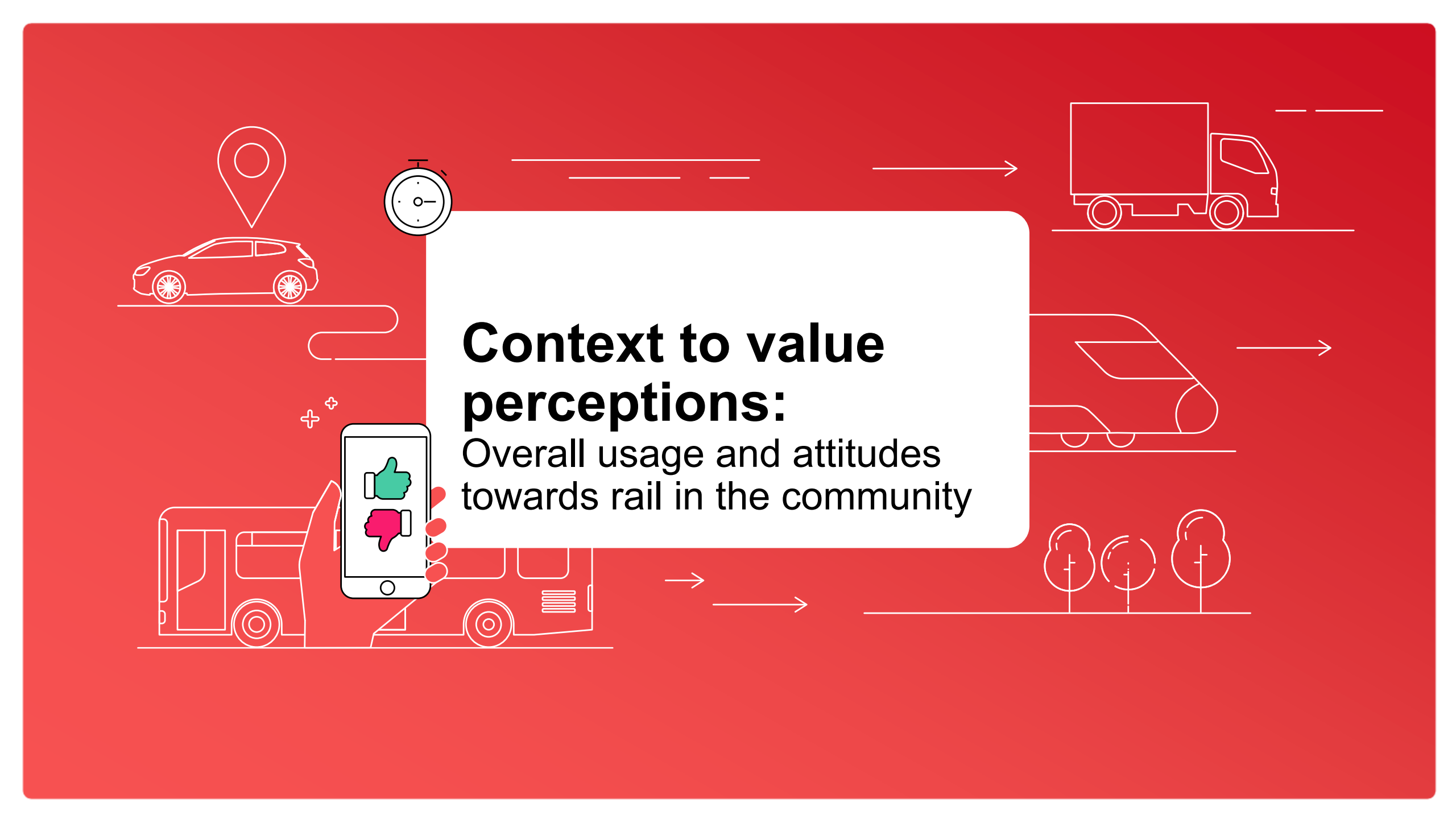
Explained their **opinions and experiences of the value for money** of rail travel



Evaluated a number of **ways that might reduce the overall cost of train travel** for better value for money perceptions – and the **impact these might have on travel frequency**

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



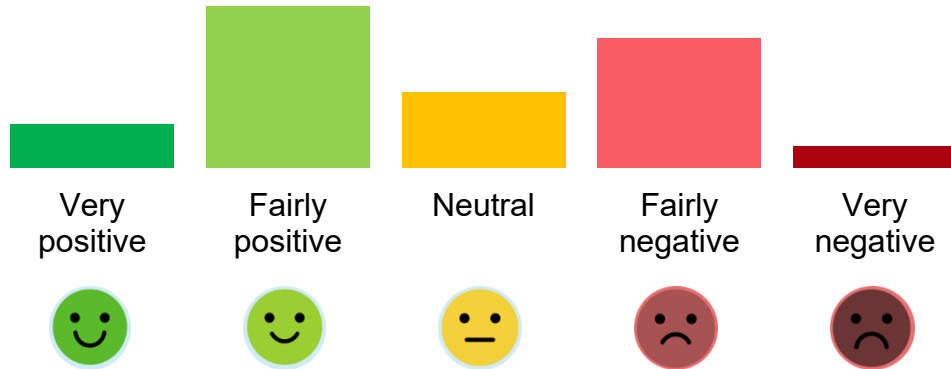


Context to value perceptions:

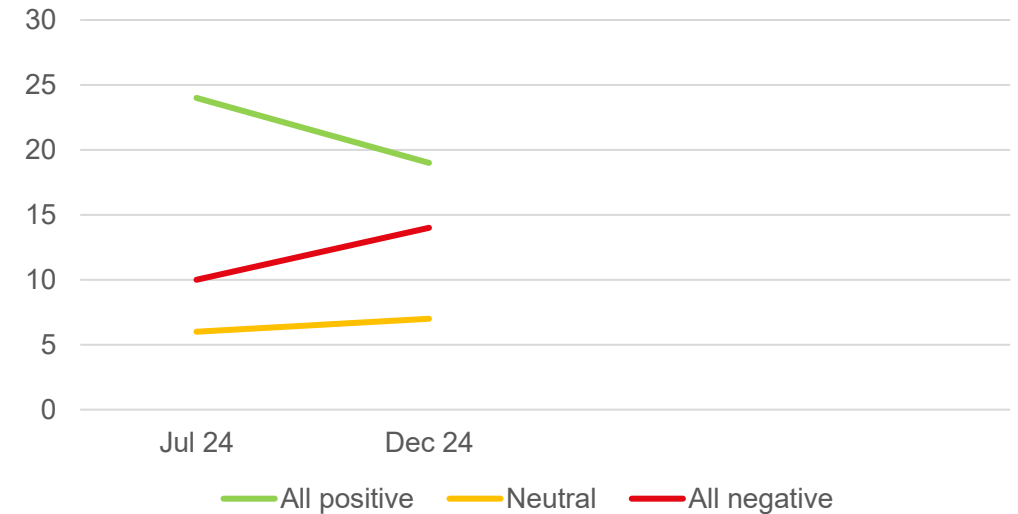
Overall usage and attitudes towards rail in the community

As backdrop to their feedback on this topic: the community brings a range of views about rail travel. Many are at least somewhat positive, but less so in winter

How you feel about travelling by train at the moment:
A snapshot, December 2024



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 2024 (40); figures shown are absolute number of people

(It's notable that the cost of train travel is identified as a key influence on these overall opinions of rail, before prompting on the value for money topic)

Top 5 factors mentioned to explain overall rail sentiment; July 2024

Bubble sizes indicate relative frequency with which participants mentioned each topic, whether in a positive or negative sense

Reliability



Connectivity

(fast, good coverage, facilitates travel)



Price



On board environment



Crowding / capacity



I use the train rather a lot, I don't drive, public transport in my only real option.

On the whole journeys are pleasant and without incident, 90% of the time things are fine and, when not too crowded and there isn't too much noise, kind of enjoyable.

The prices could be better though, I do envy other European countries and the freedom the rail prices offer.

And I could do with not hearing "See It Say it Sort it" every five minutes.

Steven, 60, business

Overall feels **fairly positive** about travelling by train

I don't mind travelling by train for various journeys. It is a good option for certain journeys but not all.

The price is what really puts me off., it is really expensive and seems more cost effective to go by car.

There is also a large possibility that there will be delays so the journey could be longer than anticipated

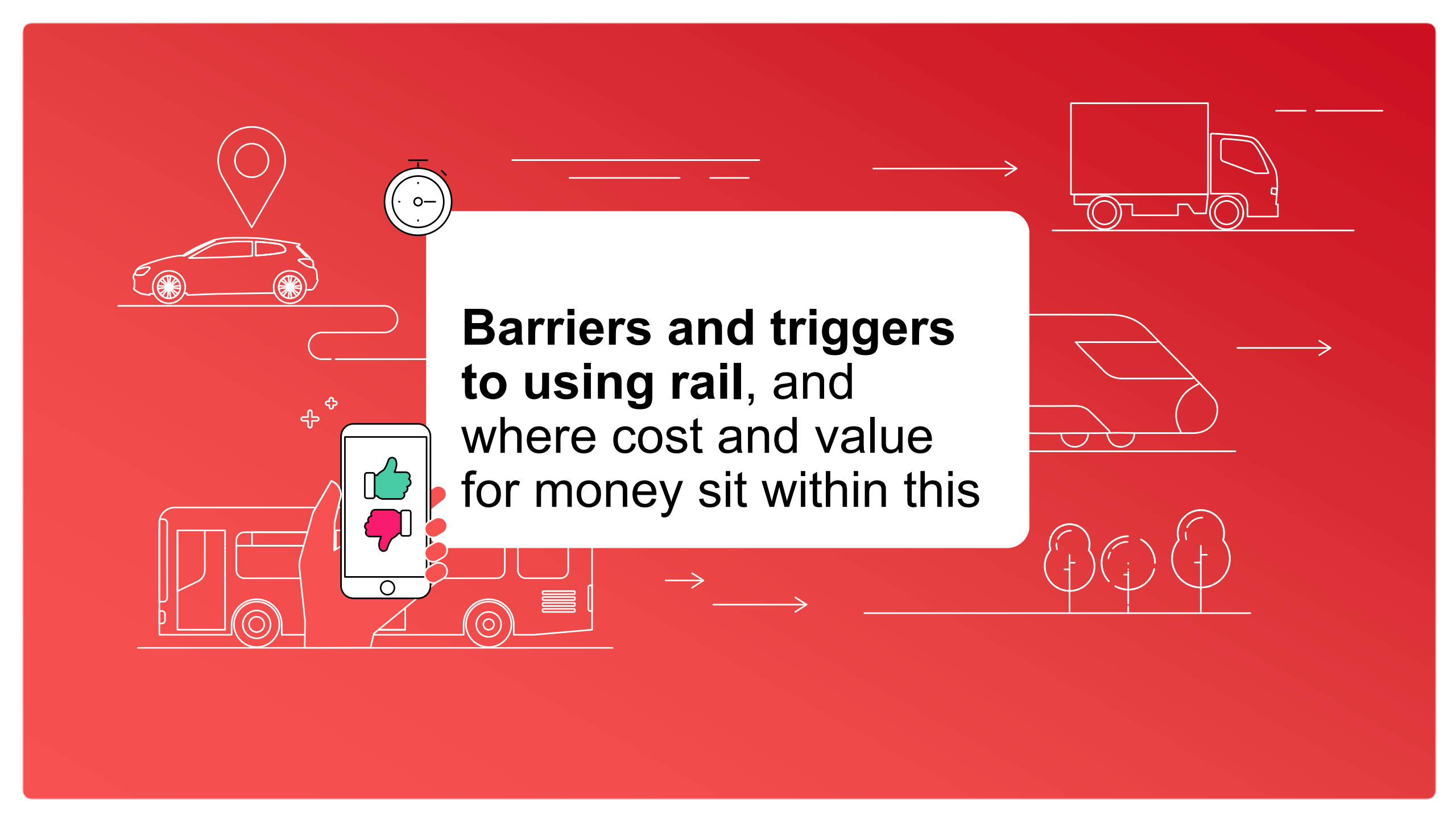
Lina, 47, leisure & business

Overall feels **neutral** about travelling by train

The cost is far too high comparable with other forms of transport
(particularly driving) and the service is not reliable enough.

Aidan, 39, commuter

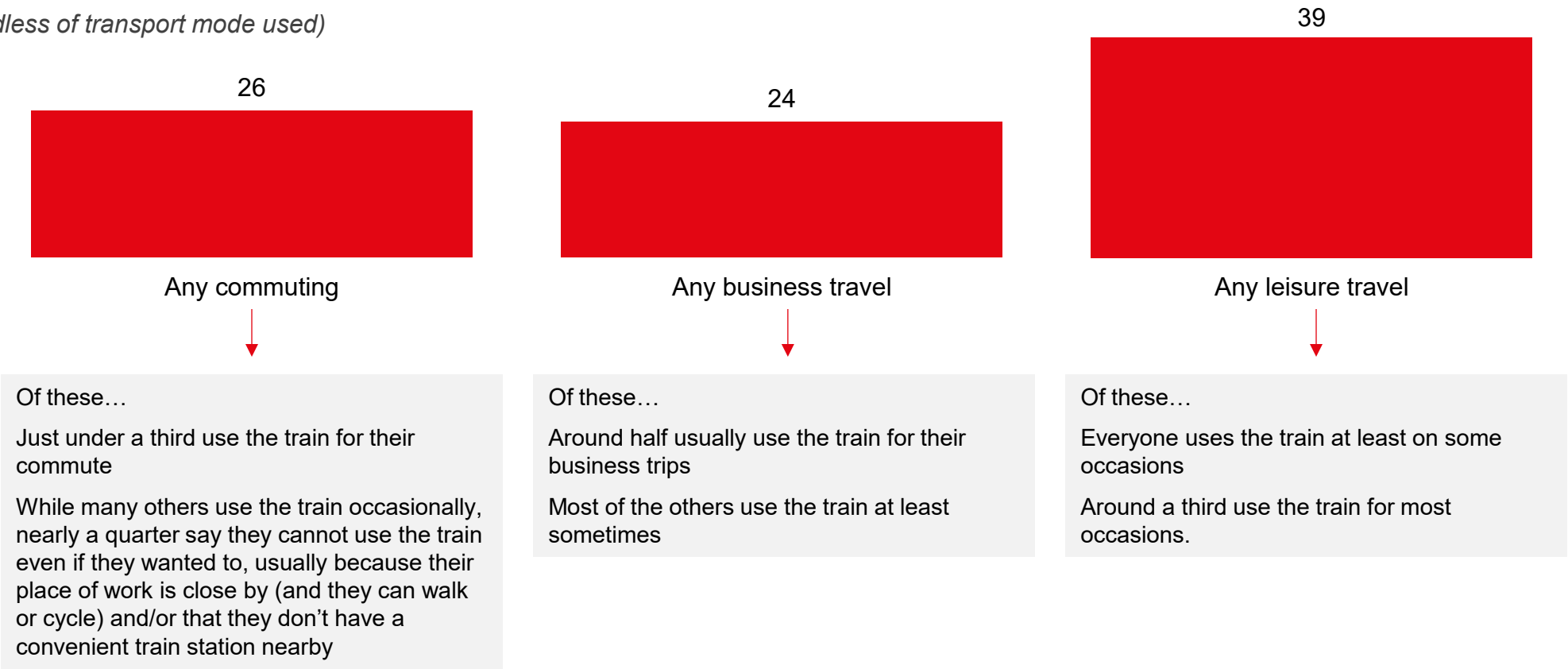
Overall feels **fairly negative** about travelling by train



**Barriers and triggers
to using rail, and
where cost and value
for money sit within this**

In giving feedback about their rail usage and value for money, most in the community were able to talk about this from a leisure perspective; feedback about commuting and business travel comes from slightly smaller groups

Number of community members who ever do...
(Regardless of transport mode used)



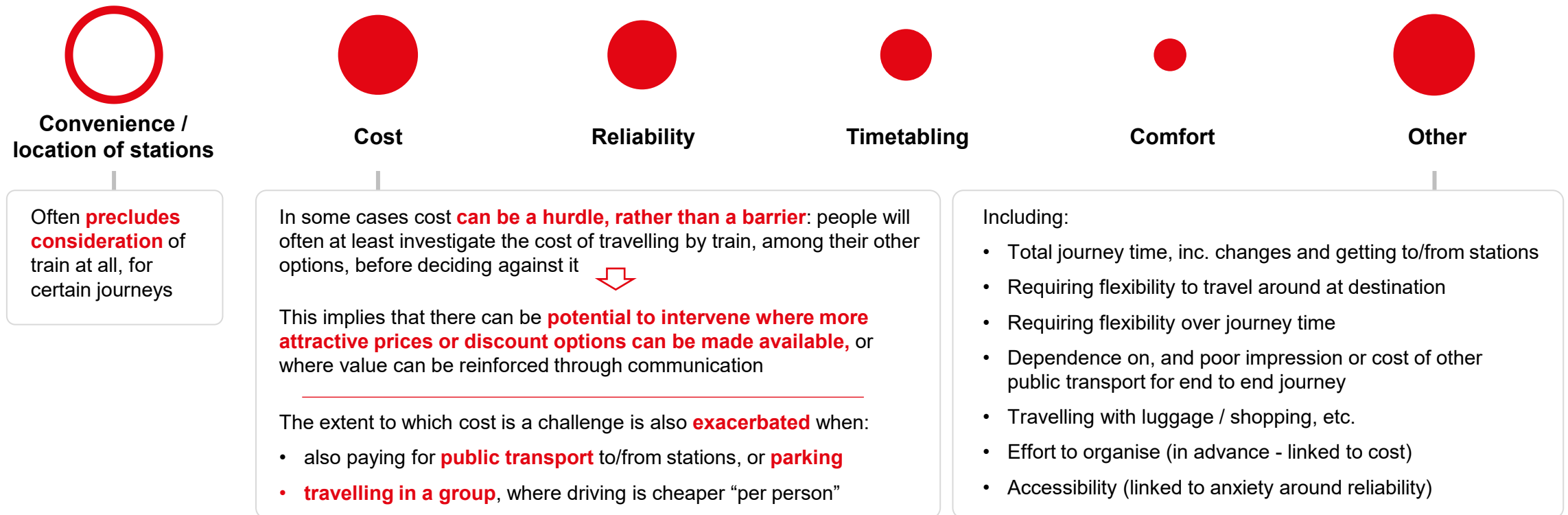
Base: all community participants, Dec 2024 (40); figures shown are absolute number of people

When people **don't** use train for a journey (and use another mode instead), this is influenced by a range of commonly-felt obstacles to rail

Beyond physical location of station, cost is a notable factor

Barriers / hurdles to choosing train when it's an option

Bubble sizes indicate relative frequency of mentions when participants explained why they sometimes or rarely use the train, for journeys that could, at least in theory, be made by train



The influence of these obstacles is different for different types of journey



Commuting

Whether or not **a station is located conveniently** to home and work is the stand-out reason for not commuting by train – this is a big factor in the journey time and efficiency, which are priorities here.

This is a more influential factor in commuting journeys, than business or leisure trips

This is followed by reliability, and then cost



Implies that attractive **tickets and payment options could have some impact on commuters**, but that **location convenience will ultimately still present a real barrier for many**.

It is also the case that improving pricing attractiveness may help commuters to feel more satisfied with the cost, rather than necessarily increasing commuting journeys. Separate effort to improve perception and experience of reliability is equally important here.



Business travel

Reasons for not choosing train for business are varied, but **total journey time** (factoring in any changes), and **whether or not trains run at the right times** are notably important considerations.

Location of and getting to / from stations at either end is important, but a little less so than for leisure travel and commuting. (Destinations are often in cities, with good station access, and people may be more willing to travel (drive) to the start station).

Cost and reliability also important potential hurdles, but less so than in other journey contexts (relatively lower frequency compared to commuting allows cost and occasional disruption to be less concerning)



More research is needed for firm conclusions, but this feedback suggests that **the industry should seek to reinforce benefits of rail travel for business** – supporting value for money perceptions by highlighting what customers get for their money – and focussing on the quality of the service, **as priority over potential ticket or payment initiatives**, in this context.



Leisure travel

Cost can be a particularly key obstacle to rail for leisure. Often exacerbated by the need to pay for other public transport or taxis to get to / from stations, and especially by **the “per person” cost when travelling in a group** – where driving often works out cheaper.

Leisure travelers also have a broader set of considerations which may discourage them from choosing train, than others. In particular:

- **wanting flexibility** for where to travel around the destination area, and flexibility over when to start and finish a journey; this **makes driving attractive**
- a **sense of effort** – to organise (best-priced) tickets, and to travel with belongings – is off-putting.

Again, the proximity and convenience of stations is also important, as is the perception of reliability.



Given the importance of absolute cost, **ticket and payment products or initiatives may have greatest potential impact here** – providing this does not increase perceived complexity

By contrast, rail's key perceived advantages, or potential usage triggers, are:

➡ These constitute points to be emphasised in comms and in the service itself

Commuting

Acknowledged as having potential to be more **efficient**, especially for avoiding rush hour traffic

...my office commute is 10 minutes car drive/ 35 minutes bus ride. NO train option is available. If it were, I would prefer train since it will be quicker (less traffic) and better convenience.

Gemma, 23, leisure & business

Business travel

Travelling into a city, where parking and driving might be inconvenient (and onward travel to final destination is relatively easy)

Speed: via direct, minimal stop routes

Comfort, ability to relax / work / arrive ready

Payment for train journeys is well-defined for re-imbursement, or arranged by employer

I would prefer to use the train ...because it's easier to get reimbursed for a train ticket than car fuel.

Shreya, 24, commuter & leisure

...because the conferences are held in cities..., it is often faster to get the train. It also allows any last minute work ...on the train!.

Ollie, 23, commuter, leisure & biz

...my eyes don't allow me to drive... train is the only real option, beside a coach which although cheaper is much slower and uncomfortable.

Steven, 60, business

Leisure travel

Where you want to **travel more passively**

Wanting to **avoid parking and other driving drawbacks**

Need to be able to depend on **reliability of staff assistance** for luggage, disabilities, etc.

Where **destinations suit a holiday** / trip

If there were **later-running services**

Ad hoc or unusual trips (for which, sometimes, **train simply needs to be top of mind**): weddings, funerals, journey to airport

I take the kids to the seaside, cities... places it is easy to get to by train and my accommodation is in the local area... [But it needs to be] less people and more room for prams and small children. I find trains...cramped [for] long journeys.

Amie, 30, commuter & leisure

I would regularly use the train if it were possible ...I would find it less stressful than driving [which is] busy, with roadworks, adverse weather, parking problems

Alice, 45, commuter & leisure

Guaranteed assistance [from staff or via cheap, easy tickets for carer], trains that are not overcrowded

Victoria, 5s3, leisure & business

...journeys I make require multiple trains despite the short physical distance... Time is money..., and the shorter the journeys in comparison to other [modes] would incline me to use trains

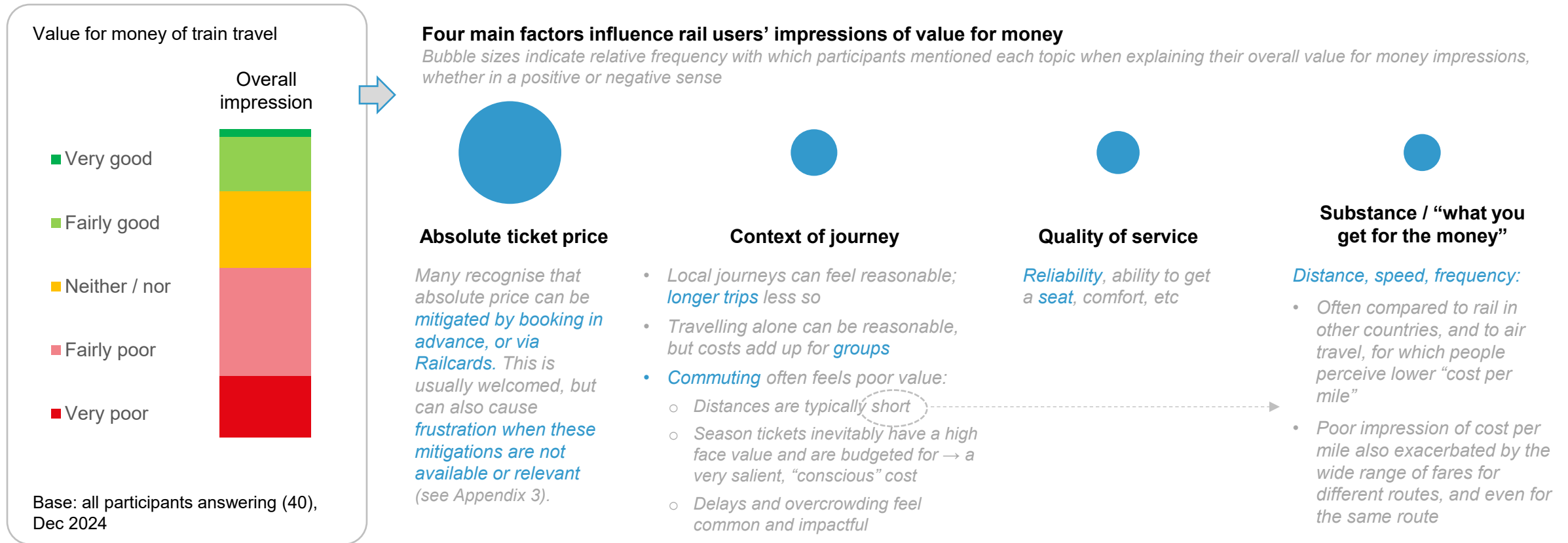
Ranjit, 23, commuter, leisure & biz

If parking was on offer I would always prefer the comfort of train travel saving the often long car journeys with ...inevitable traffic jams.

Linda, 79, leisure

Impressions of
value for money in
rail travel: in detail

Overall impressions of rail value for money are often poor, or at best variable, driven largely by absolute ticket cost, but influenced heavily by service quality and other factors



Ultimately, rail users want lower prices. Nevertheless, their feedback also indicates that **steps to reduce how much they pay, in whatever form (i.e. discounts, frequency rewards, cheaper travel times, etc), are likely to have some appeal.** Of the possible ticketing ideas proposed later in this exercise, those steps which conspicuously reduce prices (i.e. take money off or represent a cheaper alternative, rather than, for example, bundling rail with other services) are likely to be most impactful.

Beyond this, while GBRTT's FTR division may not be able to affect other influences on value perceptions, **quality of service and finding more consistency in pricing and ticket types must be a priority** for the industry more widely.

The absolute cost of tickets, more so than other factors, drives both positive and negative impressions of value for money

Journey context is an important factor in positive perceptions of value for money: non-work journeys made out of choice often felt to be more enjoyable with a better service, and are often tangibly cheaper (with Railcards and Advance tickets making an important contribution).

Service quality (reliability, speed, comfort and ability to sit) tends to be reason for poor impressions of value.

Factors influencing impressions of value for money, when people feel value for money is...

Bubble sizes indicate relative frequency with which participants mentioned each topic when explaining their overall value for money impressions

Good
(or neither
good / poor)



Absolute
ticket price



Context of
journey



Quality of
service



Substance /
“what you
get for the
money”

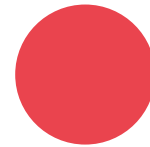
For myself trains are good value if I want to go to a city. If I consider ...running costs of a car ...trains are very good **value, especially as I have a Senior Railcard and can travel at my convenience during cheaper times.** However, if travelling as a couple/family different considerations would come into effect.

Bridgitte, 76, leisure

It can be good value for money **when it saves time and convenience** and allows work or rest on it.

Mary, 38, leisure & business

Poor



Absolute
ticket price

Mentioned by all who
feel rail is poor value



Context of
journey



Quality of
service



Substance /
“what you get
for the money”

Trains are less convenient than driving in almost all circumstances, **so the price is the only thing that it can really compete on.**

My season ticket ...is now £6,200, ...around £34.50 [per day]. Fuel for the same journey costs me £30. I can park for free at work, so the only other cost factor is wear & tear on my car. Once you factor in time... and comfort [both felt to be poor],... **it's not easy to justify the expense of ...train.**

Aiden, 39, commuter

My commute is 10 min ... £107 a month. I am stood up and squashed ...It is cheaper than parking in the city, but **just because it's cheaper doesn't make it good value.**

[I also] visit London ...a 2 hour trip normally [around] £100. Last year I travelled through Italy using ...**trains taking 2/3 hours from one city to another [for] no more than £30**, in comparison our service is not value at all.

Alicia, 27, commuter & leisure

While overall impressions of rail value for money are often poor, many concede that the price for specific, individual journeys can be more palatable



Although relatively few in this community feel that rail is good value overall, when thinking specifically about their most recent journey, half say that journey was at least reasonable

In many cases, these most recent journeys were mitigated by Railcards, and deliberate decisions to travel at cheaper times or to book well in advance



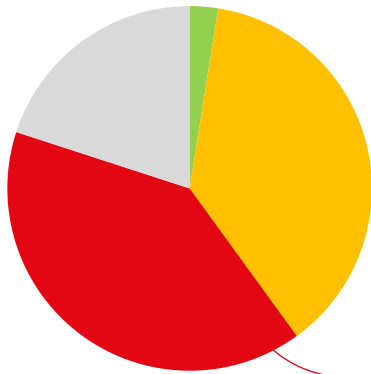
Indicates that measures like this which reduce the absolute cost for individual journeys can really help: **it is worthwhile for GBRTT to seek out and promote ways to do this wherever possible**

But, this also highlights that **there is a wider issue with value for money perceptions**, which persists at industry level despite individual journey cases often feeling more tolerable.

As we have seen, as well as **absolute cost**, the **range and variability of prices**, along with **poor quality of service on some occasions**, exacerbates this perception (partly because poorer journey experiences are more memorable than good or run-of-the-mill journeys). **These must also be areas that the industry focuses on acutely**, alongside initiatives to offer appealing ticket products and price options.

Views are mixed over whether value for money has changed over time or not – and many have little impression about this

Value for money of train travel over last 5 years



- Become better
- Stayed the same
- Become worse
- Unsure

Absolute cost is commonly perceived or known to be going up; this can feel acceptable in principle given inflation, however:

- **Quality of service** is not felt to match this trajectory
- **Comparisons to other transport modes**, and especially the **increased cost of other areas of living**, sharpen the perception of high price / poor value
- More **flexible working patterns allow some people more choice**, perhaps bringing the cost – and whether to pay it, and how much – more salience

Other perceptions of change (for better or worse) can be due to **personal circumstances**, e.g. previously having qualified for a Railcard and no longer receiving this benefit, or vice versa

*The main difference from 5 years ago is the work culture however, as **now it would be acceptable to work more flexibly and to travel during off peak hours.***

Alice, 45, commuter & leisure

Trains have become dirtier, more overcrowded and less reliable while prices have risen. It is clear these price rises do not improve trains, they enrich parasitic shareholders..

Gareth, 27, commuter & leisure

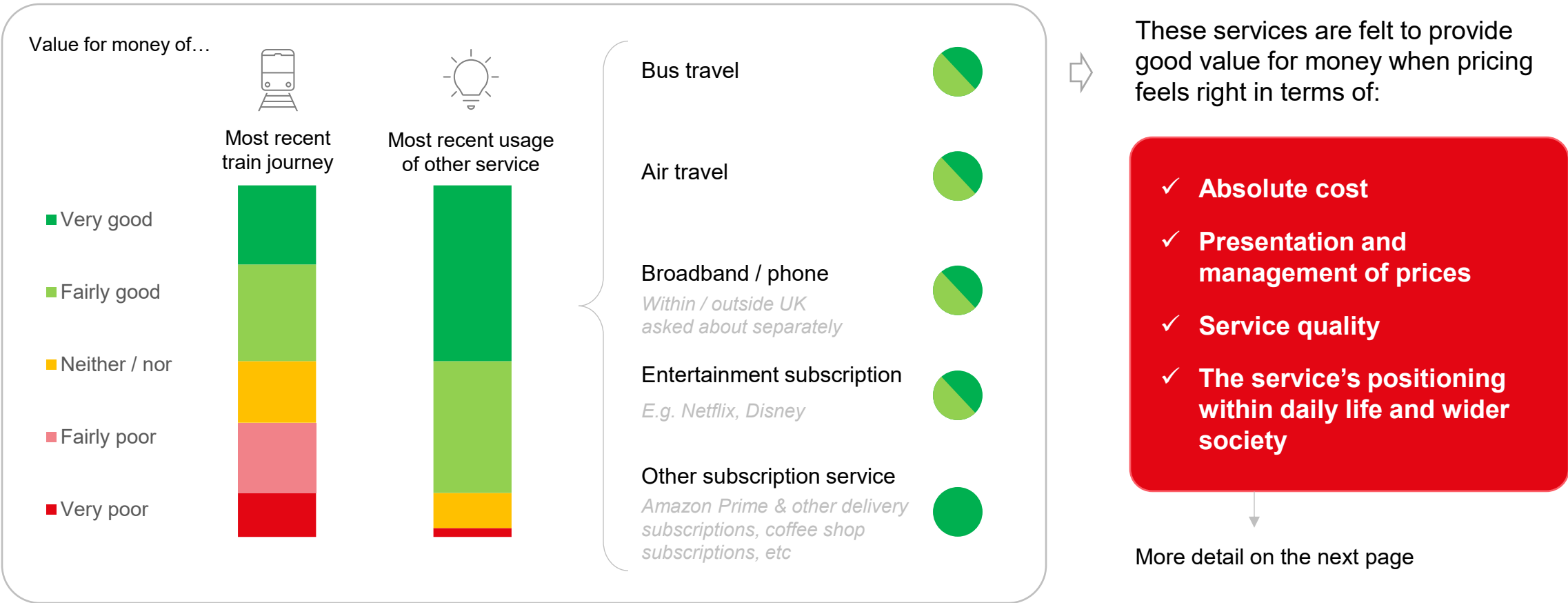
For longer distance travel... it has become worse value as whenever I have looked up ticket prices they seem so expensive ...I do not travel this way often so it does seem that the prices are a shock to me each time!

Lina, 47, leisure & business

prices go up but the service seems to decline. Maybe I just feel like this because of the cost of living crisis as everything seems so much more expensive right now.

Victoria, 53, leisure & business

Participants also gave their impressions and experiences of value for money of other services, highlighting **four areas** in which other services can feel like good value



Base: all participants answering (40), Dec 2024

“Traffic lights” indicate how well community participants rated each of these service types. This is a qualitative analysis based on relatively small numbers of people, who were rating services in the context of comparison to rail. It should be used as an indication only.

See Appendix 1 for more detail and feedback in customers’ own words

The feedback on what determines value for money in other sectors provides some insights on what might feel “lacking”, or (appearing to) work less well, in rail

Comparator service sectors are felt to provide good value for money when pricing feels right in terms of:

Note: there are, of course, instances where these services can provide poor value for money; experiences of this are not covered here.

In this exercise, participants talked about services that they personally feel are good value, and gave examples of what creates this value, to provide learnings for rail

Absolute cost

Absolute cost is **relatively low**

E.g. “price per mile” comparisons with bus, cheap European air travel

Absolute cost **has reduced**

Especially in technology based services

Service received reflects the price

E.g. buses can be slow, but the price is fair in this context

Customers literally get a lot for their money

Especially with entertainment content providers and subscription services like Amazon Prime, etc.

Presentation and management of prices

Pricing feels **uncomplicated, logical**

Customers know where they stand: price does not vary for apparently arbitrary reasons, or change without notice

Visible competition reassures that prices will be **competitive**

(inc. negotiation opportunity)

Comes with **discounts, perks, even upgrades** – or is provided as a perk / bundled with other services

Volume / incremental usage discounts

As more people in the same household make use of the same service (e.g. multiple mobile phone contracts), or greater use is made of the same service

Service quality

Service **meets expectations**

Service **does not appear to deteriorate**

(or can be upgraded during the term, e.g. broadband contracts)

Tangibly **better service / better products than what was available within relatively recent memory**, due to technology development

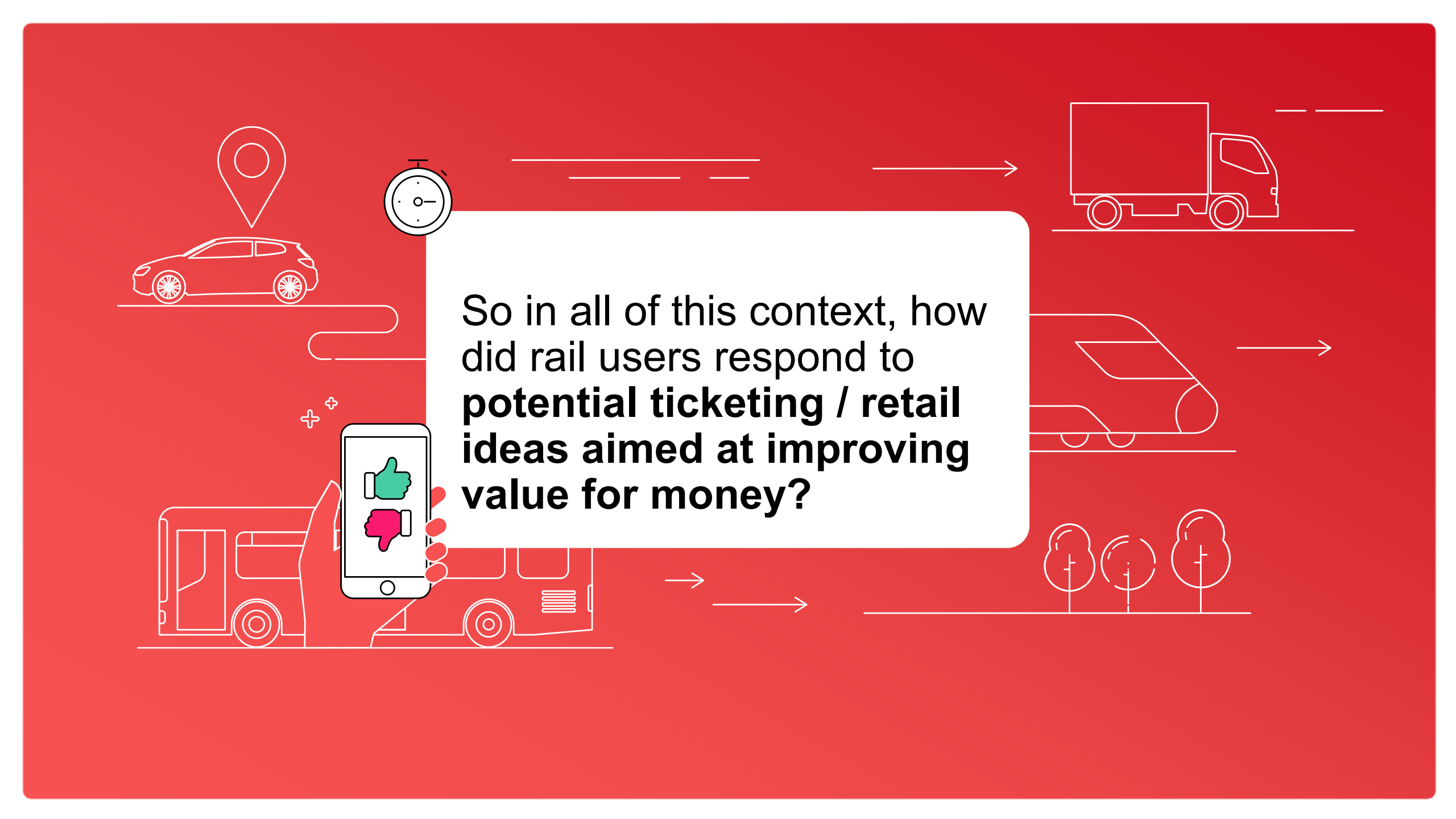
Customer service is effective

The service’s positioning within daily life and society

Government interventions make for a **salient, positive story around value for money**, and help customers feel heard and valued

(e.g. £2 bus fares, prevention of mid-contract price increases for broadband)

Where **effort** is required to secure a good deal (through research, or even negotiation), this **feels acceptable** given low frequency of needing to do so, and “big occasion” nature of the purchase (e.g. holidays and air travel)



So in all of this context, how
did rail users respond to
potential ticketing / retail
ideas aimed at improving
value for money?

Participants evaluated a number of ideas that might improve value for money perceptions and/or encourage more (frequent) rail travel

Some of these ideas already exist, some are available in certain areas only, some are potential ideas that could be developed in future

They can be grouped into six broad areas:

(Each participant was presented the ideas in a randomised order)



Flexibility restrictions

*Available today;
familiar to many*

- Ability to book in advance for cheaper prices
- Ability to sacrifice some flexibility for cheaper prices
(e.g. Off-peak ticket)



Ticket products promoting frequency

Some available today

- Bigger discounts for more frequent travel
(e.g. 5% off for travelling 2 days per week, 10% for 3 days, 20% for 4 days, 25% for 5 days)
- Pay for 4 days on a route, for 7 days travel
- Flexi tickets
(e.g. buy 10 discounted tickets, to use any time within 30 days)



Local journey incentives

Available today in some areas

- Ability to PAYG within a given area, with a cap on the max you could pay for the day
- Flat fare for unlimited travel within an area, during 1 day / week



Bundled ticket products

Available today in some circumstances

- Free / reduced parking with train ticket
- “Bundle” train journey with other services, e.g. accommodation, attractions, etc.
- “Bundle” train with onward travel by bus, underground, bike, etc.
- Discounts on other modes to/from station
(e.g. discounted bus / underground tickets)



Short term offers

Available today in some circumstances

- One-off or seasonal special offers / promotions



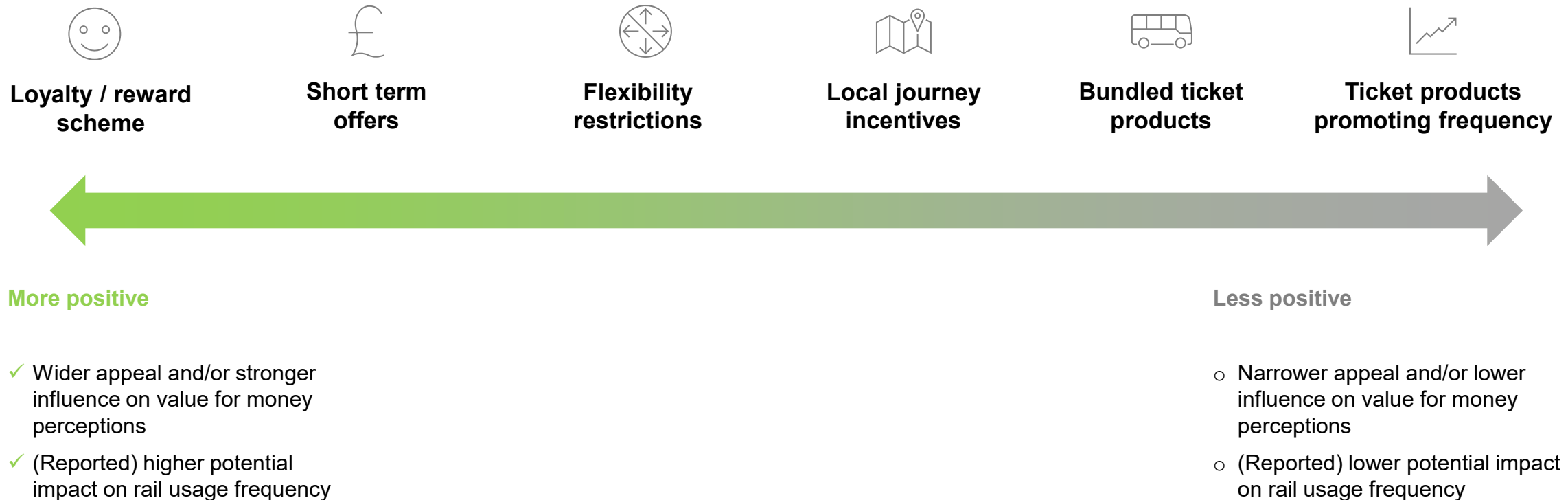
Loyalty / reward scheme

Not widely available today

- Reward scheme
(e.g. getting a free or discounted Railcard for leisure travel after a certain number of journeys, or getting points you can put towards future journeys or other benefits. You might get more benefits or discounts, the more you travel by train.)

Very broadly, rewards, offers and existing Advance and Offpeak products have widest appeal

(These are also arguably the simplest to understand, given existing widespread existence in rail or other sectors)



In more detail: some individual ideas show more potential than others

Good potential impact on value for money

More than two thirds of participants agreed these ideas aided VFM

Some potential to impact on frequency

Between half and two thirds of participants felt this could increase their rail usage

- Reward scheme
- One-off or seasonal special offers / promotions
- Ability to book in advance for cheaper prices
- Ability to sacrifice some flexibility for cheaper prices
- Flat fare for unlimited travel within an area, during 1 day / week

Some impact on value for money

Between half and two thirds of participants agreed these ideas aided VFM

Lower potential to impact on frequency

Less than half of participants felt this could increase their rail usage

- Bigger discounts for more frequent travel
- Free / reduced parking with train ticket
- Pay for 4 days on a route, for 7 days travel
- “Bundle” train journey with onward travel
- Flexi tickets

While car parking at stations does not have universal relevance, it stands out from other ideas here, as it is felt to make a big difference to VFM perceptions for those who use or could use this

Some impact on value for money

Between half and two thirds of participants agreed these ideas aided VFM

Some potential to impact on frequency

Between half and two thirds of participants felt this could increase their rail usage

- Ability to PAYG within a given area, with a cap on the max you could pay for the day
- Discounts on other modes to/from station

Lower impact on value for money

Less than half of participants agreed these ideas aided VFM

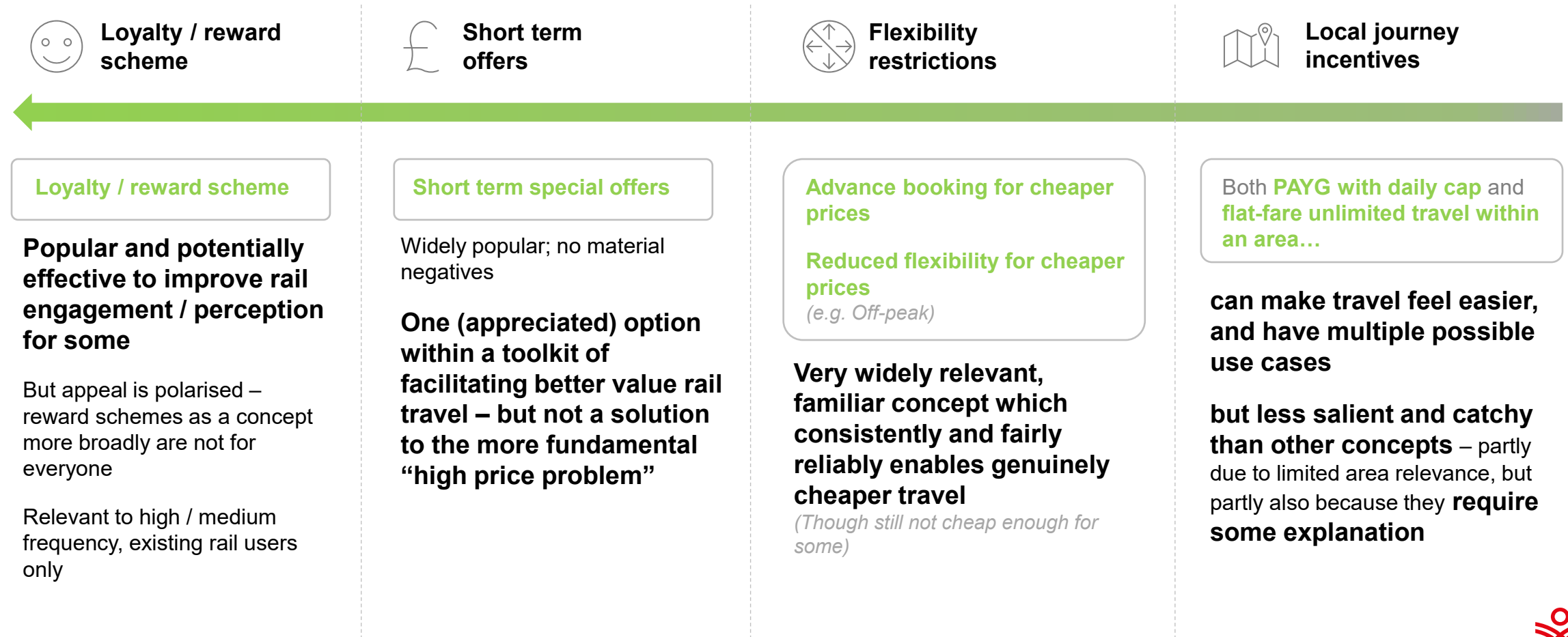
Lower potential to impact on frequency

Less than half of participants felt this could increase their rail usage

- “Bundle” train journey with other services, e.g. accommodation, attractions, etc.

Individual ideas: snapshot summary of feedback and opinions

The most popular ideas



Individual ideas: snapshot summary of feedback and opinions

The less universally popular or niche-appeal ideas



Bundled ticket products

Discounts on other modes to/from station

Bundle train + onward travel on other modes

Limited relevance but can make end-to-end travel easier & cheaper

(once customer gets past more complex ticket terms – note: these ideas appear easily conflated in this exercise → need very clear explanation in reality)

Discounts (or PAYG across modes within an area) **more appealing overall than bundles / packages: easier to understand, more transparent, more flexible**

Free / reduced parking at / near station

Similar benefits as for discounts on other modes, but **eye-catching and popular among those needing to drive to station**

Bundle train journey with other services (e.g. accommodation / attractions)

Very limited appeal, relative to other ideas presented here

(but other, separate feedback has indicated some interest, in very specific, “big ticket journey” circumstances)



Ticket products promoting frequency

More frequent travel = bigger discounts

Flexi-tickets

(e.g. buy 10 discounted tickets, to use any time within 30 days)

Pay for 4 days, for 7 days travel

Limited relevance, and less catchy than reward schemes

Sliding discount scale meets least resistance: less specific, easier to understand, feels more relevant to wider range of journey purposes (commuting, as well as regular leisure or business travel)

Pay for 4, use for 7 feels most restrictive

Summary



Summary (1): triggers and barriers to using rail

Perceptions and/or experience of ticket price is a key factor in whether or not people travel by train, how often, and how they feel about it.

Seeking to develop products or initiatives that lower cost in absolute terms, or improve perception of value, can play a role in increasing rail usage.

Other **key triggers to using the train – which should be emphasised both in service delivery and comms** – are that it:

- Can be the **fastest and most efficient way to travel** (a benefit which is most obvious for journeys to/from urban centres)
- Allows **passive travel** (for leisure journeys)
- Facilitates **productive time** (e.g. for business travel), and arriving ready to work well

...And some **notable improvements which might increase usage** include:

- Stronger guarantees of **staff availability and assistance** (for those with difficulty boarding / disembarking for any reason, or for everyday questions)
- **Later-running services**
- More **direct services** between more locations
- Simply being more **top of mind**

Beyond cost, **other most common obstacles** to using the train are:

- Whether or not a **railway station is in proximity** (inevitably, this often precludes consideration of rail at all)
- **Reliability** of trains themselves, as well as of ancillary services including availability of staff, working lifts and ticket machines at stations, etc.
- **Timetabling** (existence of direct trains, their frequency, and hours of operation)
- **Comfort** / environment on board and at station
- (Plus a range of other hurdles which individually affect fewer people)

In order to increase rail usage, the industry must also address these broader issues alongside initiatives for pricing and ticketing.

Summary (2): value for money perceptions and product initiatives

Overall **impressions of rail's value for money are often poor**, or at best variable.

This is strongly driven by the absolute price of tickets:

Ultimately, rail users (and potential users) want lower prices, across the board, in order to encourage usage.

Nevertheless, **initiatives to reduce how much they pay in other forms** (i.e. discounts, frequency rewards, cheaper travel times, etc), **are likely to have some appeal. It is worthwhile for GBRTT to seek out and promote these wherever possible.**

A number of such initiatives (some already available, some not) were evaluated in this exercise. The most popular were:

- Loyalty/reward schemes (though more work is needed to explore this in detail)
- Special offers
- Cheaper ticket options that come with some trade-off on flexibility (e.g. Off-peak, Advance)
- Free or reduced car parking at or near to stations, while not universally relevant, was also very eye-catching

The feedback also highlighted **principles which should be borne in mind when developing these and any other products or initiatives:**

- Take care that ideas are not – and are not perceived as – a **sticking plaster** over the widely-held opinion that rail fares are simply too high on average
- Provide **(different) products or initiatives for those who travel frequently, and those who don't** (or cannot)
- **Keep it as simple as possible:** Ideas like PAYG and flat fares within an area have potential, but can struggle to catch attention, partly because they need explaining
- ...and related to this, **limit overall number of products and initiatives** – perceived overall complexity impairs the understanding and appeal of individual ideas
- **Conspicuously lower prices are more (easily) attractive than “packages”** (which might include bundled train + onward travel, carnet-style or even capped PAYG products) – due to perceived transparency, complexity, and simply seeing a tangibly lower price
- **However, “package” products like this can also be perceived as lower effort** (fewer tickets to buy and use, assumed better integration of other modes, etc.). This balance between complexity of the product terms, and the ease of using in practice, is **likely best addressed via presentation and communication.**

Summary (3): Further influences on value for money

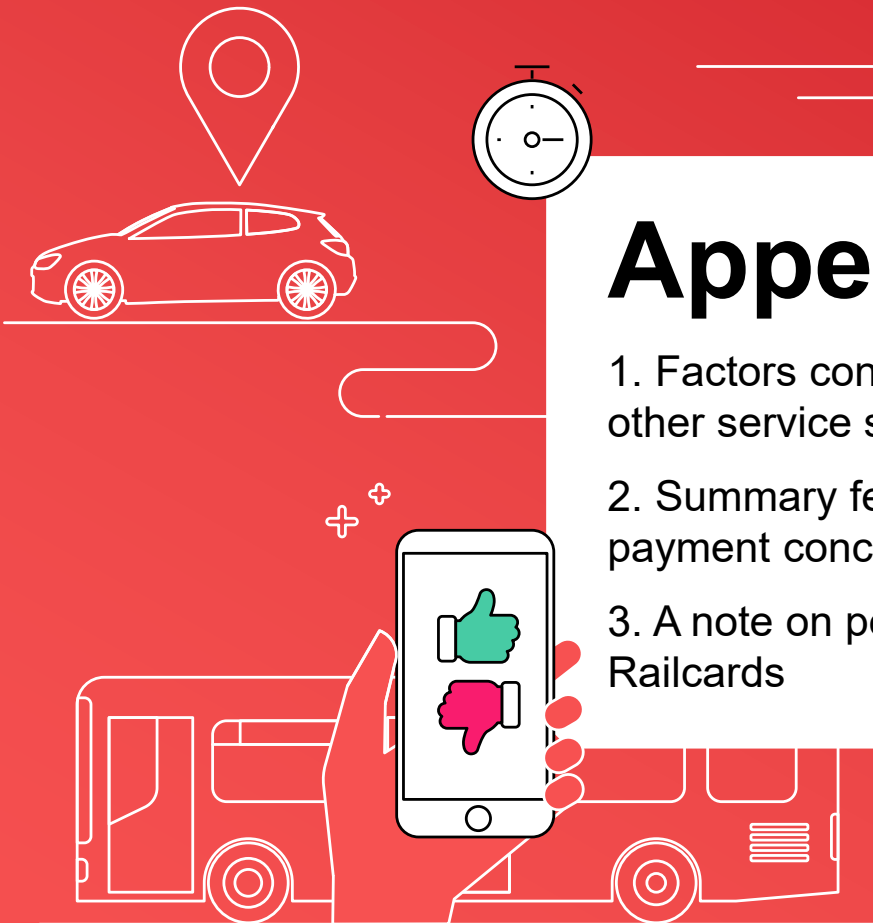
While absolute ticket price is the main driver of value for money – and so the ideas above can have an important role to play – **impressions of value are also influenced by:**

- The **context of the journey** – opinions are poorest among commuters and infrequent long-distance travellers; these groups may merit most attention in product development, comms to encourage rail travel, and service delivery
- The **quality of the service** (especially in terms of reliability, crowding, and comfort)

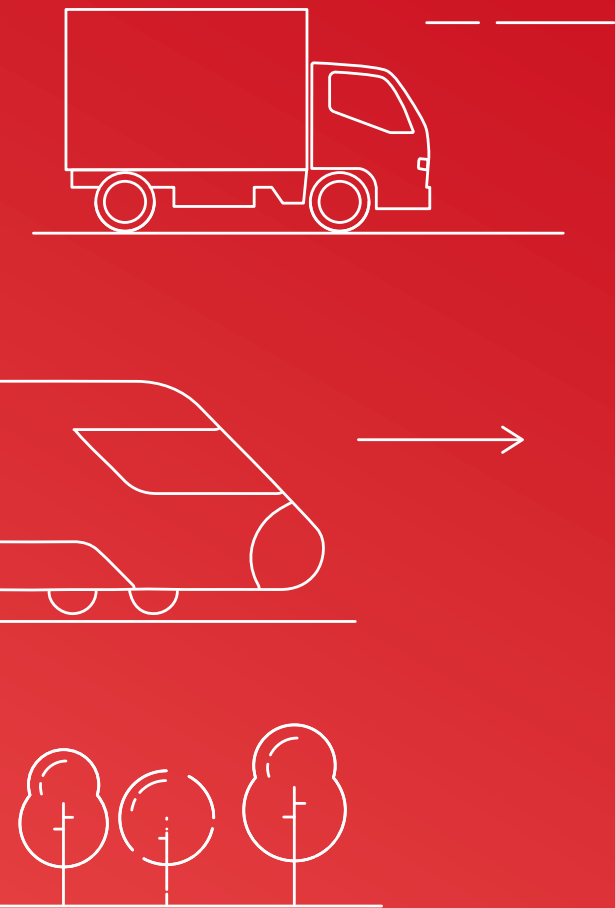
While GBRTT's FTR division may not be able to affect these areas, **quality of service and finding more consistency in pricing and ticket types must be a priority for the industry more widely.**

Other feedback about value for money in rail and other sectors also provides some insights on **what feels “lacking”, or working less well, in rail:**

- **What you get for your money (e.g. “cost per mile”)** – exacerbated in the rail industry because this appears to be very variable, across the country, at different times of day, depending on when you book, etc.
- **Presentation and management of prices** (e.g. how complex the fares are, whether or not there is “volume discount” for more frequent use, or more people in a travelling party)
- **Service quality** (as above)
- **How involved government / authorities are in regulating and controlling prices** (e.g. setting price caps, reducing surprise costs by banning mid-contract price rises, etc.)



Appendix

1. Factors constituting good value for money in other service sectors
 2. Summary feedback on individual product / payment concept ideas
 3. A note on perceptions of Advance tickets and Railcards
- 

Factors which constitute good value for money in other service sectors (1/2)

Bus



Good value for money

Many benefit from **genuinely, low-cost** service:

- £2 fares introduced after the pandemic
- region-wide public transport management enabling cheap PAYG and flat fares (e.g. London, Manchester, Scotland)
- free or discounted travel for certain groups and demographics

The £2 fare **government intervention has also made value for money in bus travel salient** (arguably sharpening the contrast to rail)

Pricing feels **uncomplicated** and therefore fair (not only due to the £2 flat fares)

Service often acknowledged to have limitations (**slower and can be less comfortable than trains**), but **prices felt to reflect this**, making it acceptable

The £2 fare on buses is an extremely good deal. Even when it increases to £3 soon it is exceptional value.

Roy, 76, leisure

The fare was fixed and reasonable ... [I was not] stressed about competing with some obscure pricing algorithm like I do with trains. ... The experience wasn't overwhelming... but for the price it was good.

Gareth, 27, commuter & leisure

Air travel

(asked separately for within/outside of UK)



Good value for money

"Price per mile" feels much less, in comparison to rail

People tend to book in advance and to put some level of research into buying tickets for air travel (given longer, typically less frequent and "occasion" journeys, this feels acceptable), and have a **greater sense of having found a good deal**

As for bus travel, cheaper tickets can be associated with "no-frills" service, but this can feel acceptable

The booking process was easy, the price was great, the flight both ways was bang on time. I have used this airline before, it is a budget airline, so there are no frills. But the service is great, the cost is really good and this is why I would use them on a regular basis because I don't feel like I'm getting ripped off.

Lee, 52, leisure

I often compare the cost of UK travel to airfares! Probably not fair as [they are] different services but the comparison is because for the price of a train ticket you could travel somewhere much further abroad by plane!.

Lina, 47, leisure & business

"Traffic lights" indicate how well community participants rated each of these service types, taking into account their overall impressions and their most recent usage occasion. This is a qualitative analysis based on relatively small numbers of people, who were rating services in the context of comparison to rail. It should be used as an indication only.

Factors which constitute good value for money in other service sectors (2/2)

Broadband / phone



Good value for money

Prices perceived / known to have reduced over time

Fixed prices (18 m / 2 yrs); when customers feel value for money is good, it's often linked to feeling that **they know where they stand for a long time period**

(As for buses, government intervention to prevent mid-contract rises is appreciated and makes for a positive story around value for money)

Service received largely **lives up to expectations**

Discounts, perks, upgrades (can be) provided at no extra cost during contract

Some **ability to negotiate** and take advantage of **competitive market**

Usage by several members of a household is effectively a **volume discount**

...phone services have stayed around the same prices and with new ...[handsets] yearly I believe they are a decent value... These type of services tend to come with perks that intrigue customers but also make sure that you are getting your money's worth.

Ceri, 17, commuter, business & leisure

My provider fixed the price for two years... And gave us a significantly quicker speed than others... Had no complaints about the service ...either. They do what they say on the tin.

Harry, 30, leisure

Entertainment / other subscriptions



Great value

(Netflix, Disney, etc.)

(Amazon Prime & other delivery subscriptions, coffee shop subscriptions, etc.)

High volume – the amount of (continually renewing) content and services available feels generous (Amazon Prime especially notable for the range of services, speed and effectiveness of delivery, and unlimited feeling)

Effective customer service, and service which meets or exceeds expectations

Comparison made to previous years where films had always to be paid for (and were more effort to access), and/or when available content was much more limited

Often **provided as perks / bundled** with other services

Spotify...is pretty incredible in the sense that it provides access to a staggeringly vast selection of music and audiobooks which you can access as much as you want...

Tony, 50, business

A wide range of entertainment for low cost is great value in comparison to what was previously just individual films

Nathan, 20, leisure

I can order as much as I want, and shipping is covered ... I can return things and they are refunded [quicky]. I also get Prime TV included.... A student ...discount too.

Miriam, 35, commuter, business & leisure

Years ago a Sky subscription [was] a luxury... [Now] Amazon Prime [is free] with ...insurance, and Disney with my bank account.

Alice, 45, commuter & leisure

"Traffic lights" indicate how well community participants rated each of these service types, taking into account their overall impressions and their most recent usage occasion. This is a qualitative analysis based on relatively small numbers of people, who were rating services in the context of comparison to rail. It should be used as an indication only.

Summary feedback on individual product / payment concept ideas (1/5)



Reward scheme / short term promotions

Reward scheme



Broad but not universal appeal
(A favourite for 10,
a least favourite for 8)



Potential impact on:
• Value perception – good
• Rail frequency – some

- ✓ Can feel like an **acknowledgement of frequent custom** (though not always a strong incentive to travel more)
- ✓ Can bring **rail more front-of-mind** as an option for travel
- ✗ Appeals to at least relatively frequent users; **less so to infrequent users**
- ✗ **Scepticism about reward schemes** more generally as a concept

A good reward scheme could entice me. If the tenth journey was free, then maybe I'd be in more of a hurry to make the 9th
Steven, 60, business

...probably would have very little impact on my train travel, but nice to have
Sonia, 74, leisure

I would like ...a reward scheme as I have to travel to work by train anyway.
Shreya, 24, commuter & leisure

Reward schemes ...if there's an advantage to be had for spending a little bit extra travelling by train instead of other options, then I'd gladly consider it.
Mary, 38, leisure & business

The market is flooded by reward schemes that people ignore.
Geoff, 44, commuter, business & leisure

One-off / seasonal offers or promotions



Broad, rarely challenged appeal
(A favourite for 12,
a least favourite for 2)



Potential impact on:
• Value perception – good
• Rail frequency – some

- ✓ Reducing absolute price is popular
- ✓ Associated with **inspiration / facilitation for more leisure trips**
- ✓ **Appeals to less frequent users**, for leisure travel
- ✗ Felt to be **too ad hoc**; still need a more consistent, wholesale improvement to rail value for money

The main reason that I don't travel more by train is it is better value for money for me to drive. So anything that will save me money on my train ticket ...versus driving might encourage me to use the train more.
Lee, 52, leisure

I enjoy visiting friends and family in London so would use the train more if there was a good promotion.
Linda, 79, leisure

Special offers do not make the regular journeys any more economical.
Nathan, 20, leisure

A promotion would help with the cost ...this is probably more for long distance or even London travel...
Lina, 47, leisure & business

Don't use train that often so these would make biggest difference.
Rachel, 51, leisure

Summary feedback on individual product / payment concept ideas (2/5)



Flexibility restrictions

Ability to book in advance for cheaper prices



Broad, rarely challenged appeal
(A favourite for 11,
a least favourite for nobody)



Potential impact on:

- Value perception – good
- Rail frequency – some

✓ **Lower absolute price** is popular

(though price of train with Advance ticket is still evaluated and compared to alternatives)

✓ Familiar and **largely understood**

✓ **Fits with planned-ahead leisure** activities (fits with “life”)

✓ **Widely relevant**, inc. for infrequent users

Being honest, currently even booking many weeks in advance still doesn't make the train the same cost as driving... .

Ollie, 24, commuter, business & leisure

Most of the other ideas effect very specific people – either those who use the train for daily commuting, or people going on holiday, they are not universally beneficial. These... benefit me specifically and how I travel.

Ability to sacrifice flexibility for cheaper prices (e.g. Off-peak ticket)



Fairly wide, rarely challenged appeal
(A favourite for 9,
a least favourite for 1)



Potential impact on:

- Value perception – good
- Rail frequency – some

✓ **Similar benefits and audience appeal as Advance**

✓ Where people can travel off-peak, this is **not felt to be a compromise** – but a better, less crowded experience

× Inevitably, **not relevant for those restricted by time**

I do already look for cheaper options by avoiding peak times. Rush hour/Peak time travel is not enjoyable anyway so unless I really have to I don't, and my work mostly means I don't.

Steven, 60, business

Miriam, 35, commuter, business & leisure

Summary feedback on individual product / payment concept ideas (3/5)



Local journey incentives

Flat fare for unlimited travel within an area, during 1 day / week



Fairly wide, rarely challenged appeal
(A favourite for 8,
a least favourite for 1)



Potential impact on:
• Value perception – good
• Rail frequency – some

- ✓ **Reduced complexity** (within an area)
- ✓ Facilitates **freedom to roam**
- ✓ Potentially **relevant to both leisure and semi-regular commuting**

I think a flat fare for a week or month allows for use for work for regular journeys, as buses do for students etc. This makes train travel much more attractive for work journeys.

Harry, 30, leisure

None of these ideas seem like they would have a significant effect on train prices which are the main negative. Maybe [this idea, and PAYG within an area] would decrease the complexity....

Gareth, 27, commuter & leisure

PAYG within a given area, with a daily cap



Muted but rarely challenged appeal
(A favourite for 4
a least favourite for 1)



Potential impact on:
• Value perception – some
• Rail frequency – some

- ✓ **Similar benefits and audience appeal as flat fare**
- × Restricted to areas with **high-density of public transport**

Pay as you go only makes sense for city travel with frequent changes or multiple [journeys] throughout the day which I do not do regularly..

Nathan, 20, leisure

The pay-as-you go system works incredibly efficiently in London... and I know there has been movement to mimic this in Manchester. I do genuinely think this will massively improve Manchester.

Ollie, 24, commuter, business & leisure

Summary feedback on individual product / payment concept ideas (4/5)



Bundled ticket products

Discounts on other modes

 Muted appeal for niche audience
(A favourite for 4, least favourite for 5)

- Value perception impact – some
- Rail frequency impact – some

- ✓ Can make **end-to-end travel feel easier**, especially at destination
- ✓ **Reduced absolute price** of any part of the journey is always popular
- ✗ Potential for ticket itself to feel **more complex**
- ✗ Limited relevance: only those (able to) use public transport to stations

It's ok getting the train; it's just the other costs that come with it, like getting to the station in the first place and getting from the station to where you need to be.

Robert, 52, leisure

...It could be more complicated to combine discounts across modes of transport.

Ben, 34, leisure

Bundled onward travel

 Muted appeal for niche audience
(A favourite for 3, least favourite for 3)

- Value perception impact – some
- Rail frequency impact – lower

- ✓ **Similar benefits to discounted tickets on other modes**
- ✗ But less popular overall
 - may be **less well understood**
 - may require **more planning** ahead
 - **less transparent**

I think that this makes it harder to see how much you are actually spending on the train ticket itself with this idea. With onward travel I would not necessarily know what I will be using, might depend once I get there.

Lina, 47, leisure & business

Free / reduced parking

 Popular for niche audience
(A favourite for 7, least favourite for 12)

- Value perception impact – some
- Rail frequency impact – lower

- ✓ Very **popular among specific cohort**
- ✓ Makes **train travel feel easier**, less stressful
- ✓ **Reduced absolute price** of any part of the journey is always popular
 - **Inevitably limited relevance** – but very popular among those who drive

I'm most conscious of the parking cost and the inconvenience of worrying about parking.

Alice, 45, commuter & leisure

Bundled other services

 Limited relevance
(A favourite for 3, least favourite for 7)

- Value perception impact – lower
- Rail frequency impact – lower

- ✗ **Appeal is limited**, relative to other ideas presented here
- ✗ As for bundling other modes of travel, can feel **less transparent**, and **more complex** overall
- (Note, in other feedback exercises, this idea has been more popular in some circumstances, i.e. "big ticket" journeys for big days out or overnight trips which are planned well in advance. Lower popularity as seen here is partly due to comparisons with the other ideas on offer).

...seem like gimmicks ...in practice just another way ...to inflate prices ...They also seem like they would introduce complexity...

Gareth, 27, commuter & leisure

Summary feedback on individual product / payment concept ideas (5/5)



Ticket products promoting frequency

More frequent travel = bigger discounts



Some appeal, for relatively smaller audience
(A favourite for 3, a least favourite for 4)



- Value perception impact – some
- Rail frequency impact – lower

✓ Reduced absolute price

- × Inevitably **relevant only to frequent travellers**
- × (**Not as eye catching as** – and potentially less well understood than – **reward schemes**)

I travel twice a day five times a week on trains so I feel those targeted at more frequent travel would have the biggest benefit for me.

Alicia, 27, commuter & leisure

Pay for 4 days, for 7 days travel



Lower appeal, for niche audience
(A favourite for 3, a least favourite for 14)



- Value perception impact – some
- Rail frequency impact – lower

✓ Reduced absolute price

- ✓ Implies some **flexibility** to use a route frequently but not daily (e.g. fitting with hybrid working)
- ? ...though paying for four days (often out of 5) **does not feel enough of a discount**
- × Inevitably **relevant only to frequent travellers – but not to daily commuters**
- × Less popular than the more generic sliding scale of discounts – likely to feel **too specific, and therefore too restrictive and complex**

Flexi-tickets (e.g. buy 10 tickets, use within 30 days)



Lower appeal, for niche audience
(A favourite for 3, a least favourite for 13)



- Value perception impact – some
- Rail frequency impact – lower

✓ Reduced absolute price

- ✓ **Flexibility** to use a route frequently but not daily (e.g. fitting with hybrid working) – **more flexibility than for “pay for 4, travel 7”**
- × Inevitably **relevant only to frequent travellers – but not to daily commuters**
- × Less popular than the more generic sliding scale of discounts – likely to feel **too specific, and therefore too restrictive and complex**

...the 10 tickets within a 30 day period would be great personally for me as I work 50/50 office and home
Dave, 40, commuter, business & leisure

I have to travel very frequently for work so flexible tickets won't help me much.
Shreya, 24, commuter & leisure

A note on Railcards and Advance tickets → to many these are **mitigations** on what can be seen as a negative overall ticket and pricing landscape, rather than substantive positives

£ These tactics and others like them risk being seen as **sticking plasters**, without addressing the **core problem of excessively high prices** in many circumstances, and **service inconsistency**

*As I have a Railcard and I book in advance I can usually get a reasonable price. **However, on the day travel is extremely expensive for long journeys. This will perhaps cause people to drive more for unplanned trips.***

The price doubled for me when looking at a journey I took recently; the price went from £55 to £100 in two weeks from buying the ticket in advance [compared] to on the day. So if you plan ahead, I think trains are great value for money.

Nathan, 20, leisure

No added benefits can make a journey [feel] more value for money ...apart from the fact that the prices could've been lower.

Gemma, 24, leisure & business

*Some people benefit from discounts which benefit greatly but in general tickets for train rides are costly in my opinion. There are alternatives like buying a day pass for multiple trips during the day or making use of a Railcard for savings. **For someone who does not have this then train rides would be considered expensive.***

Mwaka, 24, commuter & leisure



...and when not relevant, inaccessible, or requiring too much effort this can be frustrating, and even breed **resentment**

*Trains rarely run on time, aren't frequent enough, aren't clean enough. **Cost an arm and a leg even with a Railcard (which I can't get).***

Harry, 30, leisure

*Besides journeys within the Oyster Card zones ...which is really good value, no I can't recall a journey that was good value. I'd use the train a lot more if it was! Sometimes if you really study a million websites and have the time and patience you can find something but ...**you almost need a degree in ticket buying!***

[NAME]

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).

Any enquiries about this report should be addressed to:

Louise Coward – Head of Insights
Louise.coward@transportfocus.org.uk

Transport Focus
10th Floor, 25 Cabot Square, London
E14 4QZ

www.transportfocus.org.uk

Transport Focus is the operating name of the Passengers' Council

We work to make a difference for all transport users.