

Rail ticket retailing: the passenger perspective

Market research findings

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1. Executive summary:

As part of its review on rail ticket retailing, the Office of Rail Regulation (ORR) commissioned market research among rail passengers to understand passengers' views on rail ticketing, including how well the integrated retail model works from their perspective and what value it brings.

The integrated retailing model refers to passengers' ability to buy inter-available tickets (that provide flexibility for using different train operating companies (TOCs), flows and terminals) and through tickets (that enable travel across the rail network with one rather than multiple tickets). It also reflects passengers' ability to buy a range of fares from any TOC or third party retailer through most sales channels, and at a consistent price regardless of channel or retailer (impartial retailing).

A mixture of robust quantitative and more detailed qualitative research was carried out in December 2014 and early January 2015, by the market research agency BDRG Continental.

The key findings from this research were as follows:

Ticket types and their implications

- The existing mix of main ticket types caters for a range of different needs and journey circumstances, and thus serves most passengers' existing needs well. (Nevertheless, some passengers also say they would like to make use of different, more flexible types of tickets. Alternatives such as more flexible seasons and carnet-style tickets (whereby passengers buy a bundle of tickets in advance (often 6, 10 or 12) that can be used on any train and any time) are popular with passengers. There are signs that these would fit well with trends in the way that passengers travel – for example, reflecting the fact that some people work part time, sometimes work at home or in different locations, or travel frequently for leisure but with no fixed pattern or consistent journey)
- Flexibility around time is highly and consciously valued for many journey circumstances. However, with a strong sensitivity to price, the opportunity to sacrifice this time-flexibility for a cheaper fare is also very important
- Although there are exceptions, rail passengers usually pay little attention to which TOC they travel with. This is often due to absence of choice, but also because passengers are primarily interested in getting from A to B, rather than who will take them there; lack of awareness of the TOC(s) operating a route also sometimes plays a part. As such, inter-availability by TOC is a less 'conscious' factor in ticket choice than timings; however, the manifestations of inter-availability are intuitive and well-used, and respondents in this survey suggested they are prepared, in certain situations, to pay more for tickets which provide this flexibility, indicating that there is value in having the option to do this

- There is also evidence that passengers value the concept of through-tickets: they assume that tickets are always sold in this way (and behave accordingly), and they would expect to pay less if they were forced to use separate tickets for a multi-leg journey, rather than a through-ticket
- Rail users may not fully grasp all of the features and conditions of their tickets, but it is clear that they benefit from the flexibility that inter-availability offers. As such, the integrated ticketing model and impartial retailing appear to work well for passengers, including in providing them with significant protections. This reflects the way passengers use the ticketing system and the varied level of understanding and expertise they have in navigating ticket options, including many in-built (but often incorrect) assumptions that they make

Ticket purchase channels and retailers

- The current mix of purchase channels appears to meet the different needs of different people, indicating that the existence of a range of channels and retailers is beneficial to passengers (and therefore, that facilitating greater access for more new entrants could benefit them further). Further, some of the passengers we surveyed felt that there could be benefits in making rail tickets available through less traditional sales channels (e.g. newsagents and supermarkets), even if these are not obvious places to pay for rail travel currently (such non-traditional outlets were felt to be most relevant to suburban travel where journeys and fares are relatively straightforward for retailers to deal with). As such, there is openness among passengers for the introduction of new and different retail channels
- The integrated retail model, and impartial access to the full range of available ticket options, can minimise 'effort' for passengers, often providing allowances for their (often incorrect) assumptions about the ticketing model
- Many passengers are unaware that TOCs sell impartially (although they assume that third party retailers, and in most cases that station ticket offices, do so). This might suggest that they therefore do not value it. However, passengers' descriptions of the way they travel by train and use tickets demonstrates that they do make use of and benefit from impartial retailing (even if unknowingly). This is most obviously manifested (though not limited to) their use of and assumptions about the existence of through-tickets. Additionally when it was explained to them that TOCs do sell impartially, they were very much in favour of this.

Ticket formats

- M-tickets (which are downloaded to a mobile phone or tablet) and particularly smartcards (plastic credit-card-sized, such as Oyster in London, on which tickets or pay-as-you-go credit can be loaded) have strong appeal for passengers

- Passengers' expectations are for these ticket formats to work in the same fully integrated way that traditional paper tickets do currently (and perhaps even more so). Such expectations will need to be either met (with the integrated retail model considered as part of technology developments in the industry), or well managed (i.e. helping passengers to understand the implications of smart tickets, whether or not the integrated model is maintained)

Considerations for the future of integrated retailing

- One broader point to note, which has been demonstrated in this research, is that often passengers do not think in detail about their train tickets (although of course there are exceptions). Partly as a result of this, and on the whole, many passengers say they are relatively content with the ticket retailing system. Furthermore, when pushed to consider ticketing in other transport sectors, and/or retailing in other sectors, passengers do appear open and willing to consider alternative and new ways to buy and use tickets. Indeed, the very fact that passengers do not 'engage' strongly with the market suggests that, arguably, consumer and regulatory organisations must seek to ensure and champion improvements on their behalf
- Furthermore, this research indicates that integrated retailing provides a variety of important benefits to passengers; it is likely that a change from this model could be rather disruptive, at least initially, and could demand significant changes in passenger behaviour. However of course, behavioural change is not unheard of, and this research does not suggest that ticket retailing could not be improved. If the integrated retail model was changed or moved away from, considerable thought would need to be given to how consumers can continue to be protected and empowered, given their low level of understanding and awareness of ticketing, TOCs and how integrated ticketing works.

2. Background and research objectives

The ORR is currently reviewing the ticket retailing market. This is prompted by concerns that existing arrangements may not foster innovative or competitive selling practices (and may even hinder potential new market entrants) and by recent changes and on-going developments in the way passengers buy tickets. This is intended to complement the Department for Transport (DfT's) wider review on fares and ticketing, which concluded in late 2013.

As part of this review, the ORR commissioned market research among rail passengers, to understand how well the existing retail system and ticket offerings work from their perspective. In particular this research investigated:

- How passengers use and experience the current ticket retailing system
- The value of national integration across retailers, with a focus on impartial selling (where passengers can buy any ticket from any retailer) and the availability of:
 - (time) flexible tickets
 - inter-availability by TOC (allowing travel on any TOC serving the route)
 - through-tickets (one ticket that covers all legs of a multi-leg journey)
- (And, as a secondary objective, an exploration of how the system might be improved to work better for passengers).

The market research was carried out by the independent research agency, BDRC Continental¹. It took place through December 2014 and early January 2015, and comprised the following:

- Quantitative research to enable robust analysis of passenger behaviours and needs
 - 1,001 online interviews with a representative sample² of adult (16 years+) rail passengers, who had travelled by train in the UK within the last month. This involved a stated preference exercise, which provided an indication of passengers' willingness to pay for certain ticket options.
- Qualitative research to provide additional detail and case study examples to aid understanding of the quantitative findings
 - Two focus groups (in London) with frequent and infrequent rail users, and covering a broad spread of demographics and rail use
 - 15 in-depth interviews with a range of passengers with different ticket purchasing habits and preferences. These people were recruited in London, Liverpool, Birmingham, Cardiff and Glasgow. They were recruited immediately after purchasing a ticket, and interviews were conducted quickly thereafter, in order to focus on a specific ticket-purchasing occasion.

¹ BDRC complies with ISO 20252, the international quality standard for market research, thus the project has been carried out in accordance with this standard. Full methodological information relevant to the project, including details of sampling, weighting and statistical confidence levels for the survey results, are available upon request.

² Quotas and weighting were applied to ensure the sample was representative by age, gender and GB region. In particular, a national Omnibus survey was also conducted to establish the profile of rail passengers, and key habits for ticket purchasing; this allowed correct weighting of the importance of at-station versus online ticket purchasing in the main online survey, re-addressing bias that would naturally be given to online ticketing, amongst an online research sample.

3. Context: key facts about passengers and ticket purchase

This research highlighted the following salient, typical features of rail travel and ticket purchase, which serve as context for the findings given in this report.

Rail passengers

The quantitative survey showed that:

- Rail passengers span all age groups
- Two thirds of rail passengers are in work, and half in full time work; this also links with socio-economic patterns: three quarters of rail passengers are in the ABC1 group
- The use of technology is prevalent: three quarters use a laptop or similar, three quarters also use a smartphone, and half use a tablet
- While commuting makes up a substantial proportion of all journeys, most individual passengers (77%) travel for leisure purposes. 13% commute and 23% travel for other business reasons (and of course there are overlaps; many passengers make different types of journey at different times).

(NB. the survey was conducted online, but responses were weighted so that they reflect the real demographics and attitudes towards technology among all rail passengers in Great Britain, not just those who are online. Information on demographics and attitudes was gathered via an Omnibus survey, conducted face to face with a representative sample of British households).

Ticket purchasing

The quantitative survey also found that:

- The most common time at which tickets are purchased is on the day of travel. Most tickets (60%) are purchased at the station; a quarter are paid for online or via an App on a smartphone or tablet
- The vast majority (83%) are currently the traditional, paper, credit-card sized tickets
- The most common ticket types are Anytime tickets (including singles, returns and Anytime Day tickets), followed by Off-peak tickets (including singles, returns, Day and Super Off-peak varieties)
- Most passengers purchase (and pay for) their own tickets, but around a fifth of business travel is paid for by someone else (e.g. the passenger's employer)

Passengers' main considerations when purchasing tickets

In qualitative discussions during this study, passengers indicated that:

- Their decisions when buying rail tickets are driven by:
 - the time of departure/arrival
 - the duration of their journey
 - ...and the price of the ticket
- They rarely pay conscious attention to the TOC(s) running the service, the format or number of tickets they will use. These things can impact on their journey experience but do not usually actively influence ticket purchase decisions in themselves.

4. Ticket types and their implications

Key findings in this section:

- *The existing mix of main ticket types caters for a range of different needs and journey circumstances, and thus serves most passengers' existing needs well. However, some passengers also say they would like to make use of different, more flexible types of tickets, such as Off-peaks or weekday-only seasons and carnet-style tickets*
- *Flexibility around time is highly and consciously valued for many journey circumstances. However, with a strong sensitivity to price, the opportunity to sacrifice this time-flexibility for a cheaper fare is also very important*
- *In general, rail passengers usually pay little conscious attention to the TOCs which operate their route. As such, inter-availability by TOC is a less explicit factor in purchase decisions, but the manifestations of inter-availability (i.e. that passengers have more choice and flexibility over the time of travel) are intuitive and well-used, and thus also highly valuable. Furthermore, there is evidence that passengers value the concept of through-tickets; they are prepared to pay less if they were forced to use separate tickets for a multi-leg journey, rather than a full through-ticket*
- *Rail users may not fully grasp all of the features and conditions of their tickets, but it is clear that they benefit from the flexibility and inter-availability offered. As such, and given passengers' low level of understanding and awareness of ticketing, the integrated ticketing model appears to fit well with current passenger assumptions and behaviours, and provides them with significant protections.*

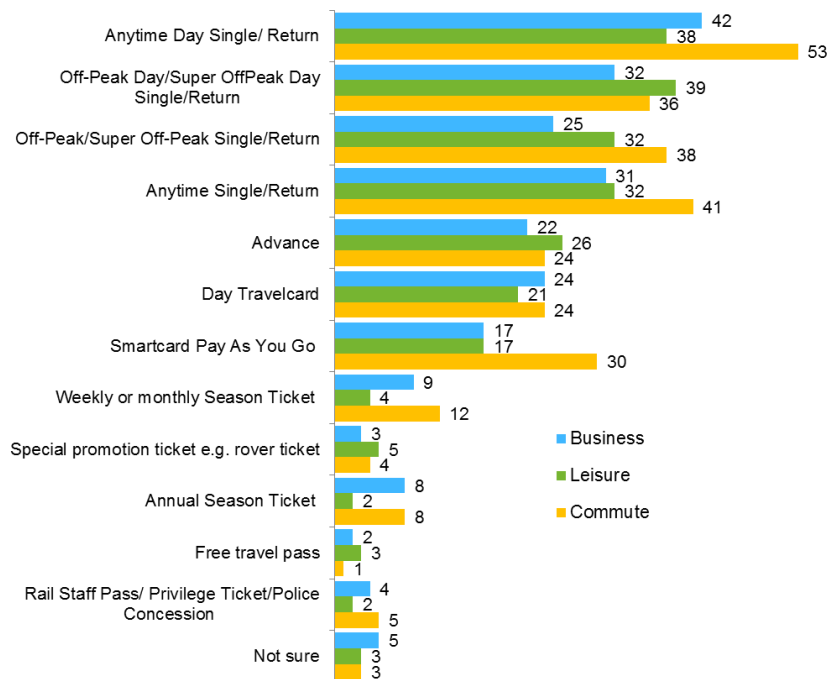
Passengers' usage of different ticket types

Figure 1 below shows the ticket types that passengers report having used at all within the last year. As shown, the most commonly used tickets are Anytime and Off-peak variations. Advance tickets are used by approximately one quarter of passengers, and season tickets and pay-as-you-go mechanisms via smartcards are common among people who make a regular commute. (The survey also asked passengers which type of ticket they used for their most recent rail journey, and the relative usage and rank order of ticket types was very similar).

Fig. 1

Ticket types used in the last 12 months (%)

Respondents who travelled in the last 12 month for business 362, leisure 945 commuting 249
(ORR Retail Review: quantitative online survey)



In qualitative discussions, passengers explained that they purchase tickets based on:

- Either price;
- Or the ticket which best suits their needs given the circumstances of the journey;
- Or the option(s) they are presented with at the time of purchase (because there is only one option, or because the passenger does not wish or is not able to consider different options).

A substantial proportion of rail tickets are bought on the day of travel, and so it is often the case that an Anytime or Off-peak ticket is the only or most intuitive option available – hence the prevalence of these ticket types. The following are some typical comments from passengers in the qualitative discussions which illustrate this:

I just went to the ticket machine and chose the best ticket available at that time

I just asked for a return ticket at the ticket office for the journey I was making that morning

When passengers engage more with the options available, they will consider the price of the ticket and the time of travel (and more often, the time of their return journey). In qualitative interviews and focus groups, passengers explained that, when they can be certain of the time they will travel, or when they are willing and able to compromise on time flexibility, they will

deliberately look for the cheapest option; this often leads them to choose an Off-peak or Advance ticket rather than a more expensive and more fully flexible option:

When I know the exact time I will meet my clients, I try to get the set [Advance] tickets because they are the best priced tickets.

However, when the specific circumstances of their journey demand it, many people value a degree of flexibility in the time of travel; for example telling us that:

I chose this ticket because it has come up for the time I wanted

I do not want to be stuck in Glasgow waiting for a train. If I finish early I just want to get home when I'm done.

The conversations with passengers in the qualitative interviews, as illustrated by the comments above, indicate that the current range of ticket types (which between them offer a mix of full and partial flexibility as well as cheaper but time-restricted travel) serve a range of different needs. Having the option to purchase either cheaper, more restricted tickets, or dearer but more flexible tickets, appears to suit passengers fairly well.

However, having the option for other, newer types of tickets would also be very appealing. Passengers in the qualitative interviews were often very keen on ideas for different formats (especially smartcards and M-tickets), and different ticket functions (especially different season ticket ideas such as Off-peak seasons, weekday-only seasons, or Carnet-style products, all of which enable passengers to benefit from the idea of 'bulk-buying' journeys but without committing to the more expensive season tickets currently on the market). Indeed, passengers sometimes suggested these types of innovations, in both formats and functions, spontaneously. More on new ticket types and formats is discussed in section 6.

The value placed on time-flexibility and inter-availability

As shown already in this report, qualitative feedback from passengers makes it clear that, in many journey circumstances, people do value the potential for train tickets to give them some flexibility around the time that they travel. Passengers make conscious decisions about ticket purchase based upon time, their level of need for flexibility around time and price.

In contrast, few consciously make decisions with a mind to travelling with a specific TOC, or with a desire for flexibility for different TOCs or different routes. The following are some typical comments made in the qualitative interviews, as illustration of this:

I usually buy it on the day and I buy a ticket for which ever train goes next

I normally don't notice who I'm booking with. I just go on the trainline.

I don't really care who carries me there as long as they get me there.

(Other research also supports this; for example, in a 2013 report published by Passenger Focus³ (now Transport Focus) about passengers' engagement with the rail franchise system, passengers generally expressed that they were unconcerned with the 'name' or 'brand' of operator serving their journey).

However, although passengers rarely register the TOC or route implications of their tickets, this research has suggested that inter-availability is important to them, if indirectly. We have already seen that it can be important to passengers that, for some journeys, they are able to buy a ticket which allows them to travel at any time (or within a particular time period, in the case of Off-peak tickets). When they buy such tickets, it follows that they also assume that they will be able to travel on any train. Therefore the fact that passengers pay limited attention to which TOC runs those trains means that they also take it for granted that there will be no restrictions by TOC where more than one serves the route. I.e. (unless they have deliberately traded time-flexibility off with price and bought an Advance ticket) for most passengers the idea that a ticket might be valid with one TOC and not with another, for what they perceive to be the same journey, does not occur to them at all:

You're paying for an open ticket; you expect to be able to get on any train you want, within reason.

Typical opinions (or assumptions) like this demonstrate the current benefits, for passengers, of the option for inter-available tickets. (Further, the fact that passengers do not usually consider the TOC which will carry them also indicates a case for impartial retailing; retailers and impartiality are discussed further in section 5.) If there was a move away from the integrated retail model, ticket purchase and usage would likely feel less intuitive for passengers than it does currently, at least initially (although we acknowledge that rail travel and ticket purchase is not always fully 'intuitive' currently). Therefore there would need to be concerted effort from the industry in consumer protection and education, if such a move were to take place.

Stated Preference exercise to understand ticket purchasing decisions

To test the factors which drive ticket purchase choice more robustly, the online survey involved the use of the Conjoint technique, to determine the relative importance of a number of factors. Conjoint is a 'stated preference' method which forces survey respondents to trade off different features in a 'package' (in this case a rail ticket), in order that we can derive which of those features are most important to them. This is more realistic and meaningful for respondents than being asked, for example, to rank a list of factors in order of priority, and thus gives better results. In this research, the factors tested were:

- Degree of flexibility in terms of time
- Degree of flexibility in terms of TOC

³ *Giving passengers a voice in rail services*, Passenger Focus, April 2013

- Degree of choice in terms of ticket format
- Whether or not they would receive a single (through) ticket, or would need separate tickets for each leg
- Whether or not they needed to purchase the ticket in advance, or could choose to purchase it at any time between 'now' and the time of travel
- Price

More on the technique and the specific exercise for this survey is given in Appendix 1.

A key output from the analysis is the importance score that is given to each feature; these are shown in the chart below. The figures in this chart indicate the relative importance of each factor, compared to the others which have been tested.

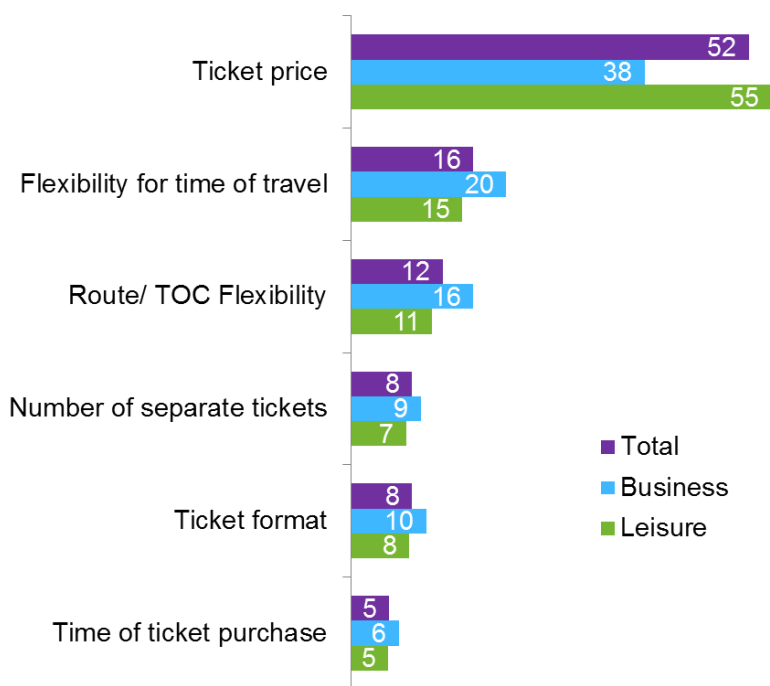
Fig. 2

Importance scores for features of ticket

(Derived from conjoint stated preference exercise: see Appendix for more details)

Respondents who travelled in the last 12 months: total 1001, for business 362, leisure 945

(ORR Retail Review: quantitative online survey)



The figures in the chart above indicate the relative importance of each factor, compared to the others shown here. Price is overwhelmingly the most important driver in deciding which ticket to buy – with an importance score of 52 overall it is just over three times more important than time flexibility, with a score of 16. Price is key for both business and leisure travellers (and various other passenger sub-groups), but as might be expected, the people who were asked to think about the journey as a business trip are a little more concerned about the flexibility they will have with the travel, and a little less concerned about the price.

Although price is a major factor in ticket purchase decisions, the concepts associated with inter-availability and integrated retailing do also have an influence on ticket purchase decisions.

Figure 3 looks at the results of this exercise in a slightly different way. This shows the proportion of respondents who are prepared to pay for a particular ticket type at each of the price points we offered them. (Please note that the prices are realistic for the journey in question, but do not cover all possible current ticket options and are only intended to provide an indication of how appealing different ticket options are). Figure 3 shows that more people are willing to pay a slightly higher price for a ticket with ‘full flexibility’, than for a ticket where the time of travel is restricted – the flexible ticket can attract the highest price, the Off-peak ticket a little less so, and the fully restricted ticket (the equivalent of an Advance) needs to be cheaper to be attractive.

Figure 4 shows the same analysis, but this time compares passengers’ willingness to pay for a fully flexible ticket, compared to one where they are restricted to travelling with a particular TOC. The effect is not as marked as it is for time flexibility (because the time of travel and journey duration is what passengers are really concerned about), but it is true that they do place a monetary value on inter-availability (likely because this is inherently linked to whether or not they are able to travel at any time).

Fig. 3
Willingness to pay for different ticketing scenarios:
Flexible by time versus restricted by time
(derived from conjoint stated preference exercise: see Appendix for more details)
(ORR Retail Review: quantitative online survey)

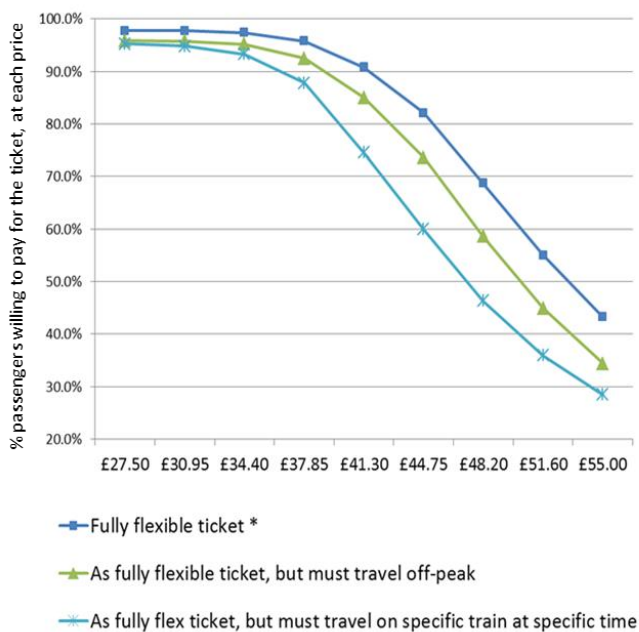
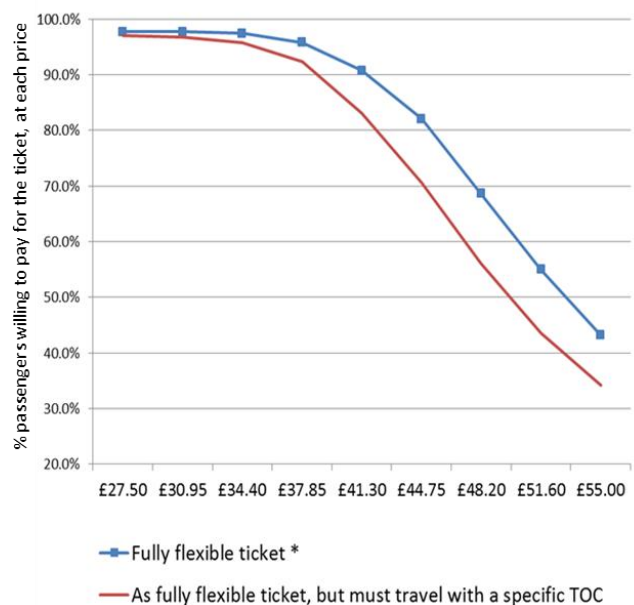


Fig. 4
Willingness to pay for different ticketing scenarios:
Flexible versus restricted by TOC



**Fully flexible ticket in these scenarios means the passenger can*

- *Travel at any time during the day*
- *Travel with any TOC serving the route*
- *Use a through-ticket (one single ticket, paid for in a single transaction, to cover all legs of the journey)*
- *Have a choice of formats for their ticket (paper, smartcard, M-ticket, printed off at home)*
- *Book the ticket at any time between now and the journey itself (i.e. does not have to be in advance).*

Through tickets

The way that passengers engage with the idea of inter-available tickets for different TOCs is reflected in their attitude towards through ticketing. Throughout the qualitative interviews for this study, it was very clear that passengers assume that they will be able to buy one ticket that allows them to travel from the start to the end of their journey, even if the journey includes more than one leg. Almost universally, it simply does not occur to passengers that they would ever be required to buy two separate tickets, in two separate transactions. This is the case for both older people who grew up with the notion of a national, 'single' British Rail, and younger people who have only ever really known the privatised system. When asked to think about the idea of not having through tickets, many passengers found this concept quite difficult to comprehend.

If I was buying a ticket from Glasgow to London and I was changing part way, I wouldn't expect to deal with two different train companies, I would think they were all getting run by some sort of organisation and they deal with the separating of the money.

We would certainly conclude that changing the system, to not support the infrastructure that makes through ticketing possible, would likely be unpopular with passengers.

There is also evidence that passengers place a monetary value on through-ticketing. The figure below shows the same analysis again, derived from the stated preference exercise, and compares passengers' willingness to pay for a through-ticket, to the scenario where they would need to buy two separate tickets, through two transactions, for each leg of their journey. As shown here, more passengers are prepared to pay for the ticket at a higher price when it is a single, through ticket, and they would be prepared to pay less if they were required to pay for each leg of the journey separately.

Fig. 5

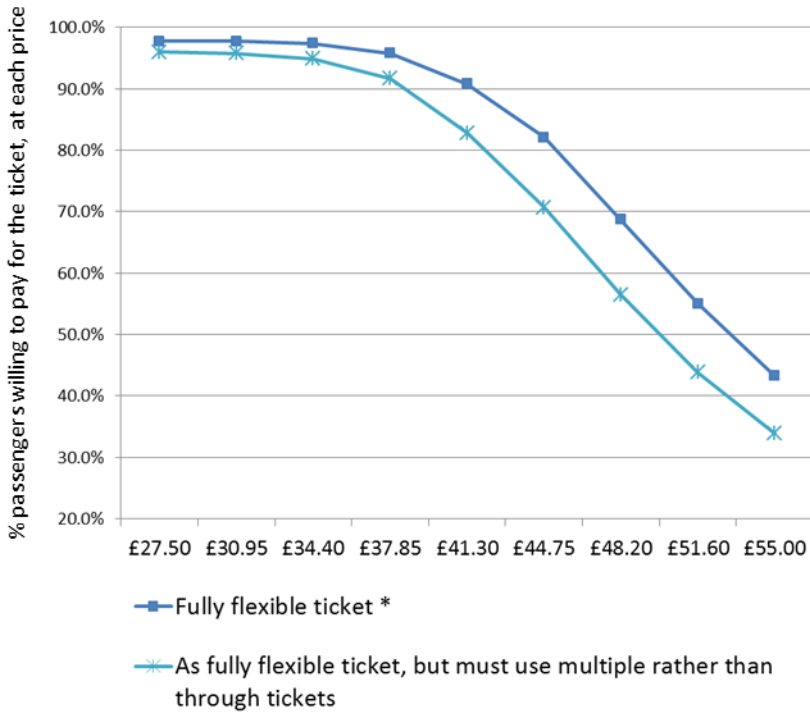
Willingness to pay for different ticketing scenarios:

Through tickets versus being required to purchase multiple, separate tickets in separate transactions

(Derived from conjoint stated preference exercise: see

Appendix for more details)

(ORR Retail Review: quantitative online survey)



(Note: the notion of ‘splitting tickets’ is quite separate from this discussion. Conversations with passengers in the qualitative interviews showed that they often feel that they are benefitting from ‘insider knowledge’ when they split their tickets and get a cheaper overall fare. There is more work involved in splitting a ticket, and it is something that passengers actively choose to do. Split ticketing is also relevant to single-leg journeys, as well as multi-leg journeys).

Passengers' understanding of ticket types and conditions for use

Finally, the following additional points emerged in the research, relating to passengers' understanding of the terms, features and restrictions in rail tickets. Gaining insight into how well passengers understand these details was not a direct objective of this review, but the following is useful background information as part of gaining an overview in understanding of passenger needs in ticketing.

Many passengers register enough about the features of their ticket for normal travel

Many participants in this research demonstrated that they have a basic understanding of the key features of their tickets which, under normal circumstances (i.e. when trains run without disruption and/or when the passengers themselves are able to travel as they intend), may be sufficient and appropriate for correct use. However, this basic proficiency is not universal and knowledge of some of the detailed restrictions and conditions is very varied.

In the online survey, respondents were asked to describe what they knew about the specific ticket that they bought for their most recent journey, at the time they purchased it. (This was an open-ended question to which respondents typed in their free-text answer):

- 42% of those who used an Anytime Day Single or Return (the most common ticket type in the survey) spontaneously referred to the fact that this ticket allowed them to travel on that day. 9% were more specific, mentioning that they would be able to travel at any time or on any train, and 8% specified that they would be able to return at any time or on any train. Other specific details were mentioned less frequently, and a small number of respondents did mention incorrect facts
- Knowledge and articulation of the conditions for Off-peak tickets was a little more consistent and straightforward: 32% mentioned that this ticket is only valid outside of peak times, and another 27% made reference to the time of travel being restricted in some way. Again, other details were also mentioned, including some which were incorrect
- Advance tickets were the most easily described by passengers: 57% of users spontaneously mentioned that the ticket would allow them to use a specific train only. 13% also said that seat reservations come with an Advance ticket, and 12% said that these tickets are non-refundable. A small number of respondents also gave further details, demonstrating that they knew (or had at least thought about) whether or not their ticket could be changed in advance of travel, to a different train.

Because this was an open-ended question, we would not necessarily expect respondents to articulate lots of detail about the key features of each ticket. In the circumstances, it is reasonably positive that this proportion (around a third or more) of respondents were able to do so. Qualitative interviews suggest that, on the whole, passengers knew a reasonable amount about their tickets in order to use them correctly, much of the time:

The reason I bought an open ticket is because there is major engineering work happening on the day of my travel. And I'm not sure what time I would be able to travel because of that. I do not want to sit on a train for 6 hours

However, passengers themselves also told us, in the qualitative interviews, that there have been at least occasional journeys where they have mistaken or been unaware of some of the terms of their ticket. Sometimes this has led to mistakes in the way they have used the tickets, including instances where they have needed to purchase another ticket. Thus, while passenger understanding is adequate in some circumstances, the research confirms that there is scope for improvement here, including perhaps, a greater role for retailers to help passengers navigate ticketing⁴.

In principle the current mix of different ticket types aligns with the way passengers think and behave: passengers can be overwhelmed by details that they do not need to know; therefore while they may not register all ticket details fully, they are benefitting from the degree of flexibility that is offered by Anytime and Off-peak, and the opportunity to trade this flexibility off for a cheaper price when possible.

(Survey participants' articulation of the features of Anytime tickets are a little less 'uniform' than for Off-peak and Advance tickets, but overall most grasped the fact that Anytime tickets are reasonably "open" (as they term it). Arguably, even if they do not register this fact consciously, this might be relatively unimportant, because they can use these tickets more flexibly and therefore the potential for 'mistakes' is lower. However, it is also worth noting that, if they do not fully understand the product, there is a risk that they don't get the best possible value from their ticket and/or don't fully appreciate the value it provides. Advance tickets are understood quite well: this is often because passengers are alerted, at the point of purchase (sometimes as a result of a seat reservation being provided), to the fact that they can use one train only. Advance tickets are also often purchased as a result of passengers deliberately seeking the cheapest option, and so they are often consciously aware that they have made some kind of trade-off to achieve that cheapest price.)

Greater clarity would aid passengers, and improve the usefulness that is delivered by the existence of a range of ticket types

While it is true that most passengers understand the basics of their ticket, it is also important to acknowledge that understanding can still be improved. Respondents in both the online survey and the qualitative interviews did sometimes miss key features of their tickets, sometimes made incorrect assumptions and often expressed concern that they do not always know the terms of their tickets. Two issues emerged in particular:

⁴ This is supported by other research, such as ORR's work in 2012 on passengers' views about choosing and buying rail tickets, which highlighted a varied understanding of ticket restrictions and validities. We note that recent initiatives, such as the industry's Code of Practice on retail information, is intended to play a role in ensuring passengers are provided with appropriate information to enable them to be confident in purchasing the right ticket.

- **Refunds**

When asked about whether refunds are available if a passenger's travel plans change, around 15% of people in the online survey could not answer at all because they didn't know. Many others answered incorrectly: Among Advance ticket users for instance, nearly a third incorrectly thought that refunds were possible. Similarly among Anytime and Off-peak users, two fifths incorrectly thought that they could not get a refund.

- **Complexity/number of different tickets**

For many passengers (including those who travel frequently and are confident about rail travel), their perception of the number of different tickets, and more importantly their different restrictions and conditions, can be overwhelming. This, in itself, can lead to mistakes being made (i.e. passengers innocently travelling with an invalid ticket), and can foster any negative impressions of the rail industry where they exist, since complexity can sometimes cause people to feel that TOCs are deliberately being non-transparent, in order to charge higher prices or 'catch people out'.

These are wide issues and not the key focus of the ORR's retail review, but it is relevant to acknowledge here. In particular it may suggest a need for retailers to take more responsibility for making sure passengers know the features and terms of the tickets they buy – for example by making it available (prominently) at point of purchase, rather than, for instance, relying on information printed on tickets themselves

5. Ticket purchase channels and retailers

Key findings in this section:

- **The current mix of purchase channels meets the different needs of different people, indicating that the provision of a range of different channels and retailers is beneficial to passengers**
- **As such, facilitating greater access for more new entrants could potentially increase this benefit further. Indeed, passengers are open to seeing new players and less traditional outlets in the market, and they certainly have an appetite for more choice**
- **The integrated retail model, and impartial access to a range of available ticket options, minimises ‘effort’ for passengers, often providing allowances for their (often incorrect) assumptions about the ticketing model**
- **Many passengers are unaware that TOCs sell impartially online and at station ticket offices, however this research indicates that they do use and benefit from this fact (even if unknowingly), and therefore that it has value**

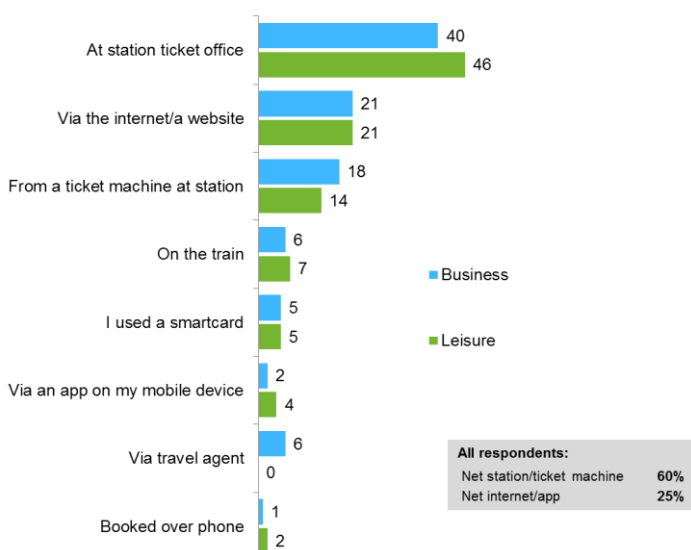
Retail channels

Figure 6 shows the retail channel used by passengers in the survey, for their most recent journey. Station ticket offices are the most commonly used outlet, for both business and leisure travel, followed by the internet which was used by a fifth of people.

Fig. 6

Sales channel for most recent journey (%)

Respondents who travelled in the last 12 months, for business 362, leisure 945
(ORR Retail Review: quantitative online survey)



The next chart below demonstrates that, in many cases, passengers also said that their usual ticket purchase channel would be their preferred one:

Fig. 7

Sales channel used vs. preferred for most recent journey (%)

Respondents who travelled in the last 12 months, for business* 362
(ORR Retail Review: quantitative online survey)

		Channel used for most recent journeys							
		Booked over phone	At station ticket office	Via travel agent	Via the internet/a website	Via an app on my mobile device	From a ticket machine at station	On the train	I used a smartcard
<i>Base</i>		4*	49	6*	58	7*	41	10*	6*
Preferred channel	Booked over phone	29	-	10	1	-	0	1	-
	At station ticket office	-	61	-	6	-	9	7	1
	Via travel agent	-	-	42	-	-	0	14	-
	Via the internet/a website	19	8	47	73	12	10	10	-
	Via an app on my mobile device	5	12	-	11	52	21	-	-
	From a ticket machine at station	-	10	-	0	-	45	1	-
	On the train	-	8	-	0	31	13	67	4
	Smartcard or contactless payment card	48	1	-	3	-	-	-	2
	At a newsagent	-	0	-	-	-	-	-	35
	At a supermarket e.g. Tesco, ASDA, Sainsbury's	-	-	-	5	-	-	-	57
	At the Post Office	-	-	1	1	4	1	-	-

Data above shown for business travellers; a very similar pattern is seen for leisure travellers

*** Please note that sample sizes for each group in the table above are small, so conclusions should be drawn from the general pattern (as indicated in the shaded boxes), rather than for each grouping individually.**

While the general pattern is that passengers appear to be fairly content with their current ticket retail channel, clearly there are exceptions. In particular, many passengers felt that mobile/tablet Apps would be their preferred purchase option, compared to their current method (particularly those who currently use ticket vending machines at stations).

Discussions in the qualitative interviews and focus groups also highlighted that: 1) many passengers are not aware (or do not feel familiar enough) with other retail channels, and 2) that habit is extremely important in driving where and how people purchase their tickets. These factors are often the underlying reasons that passengers appear, on the surface, to be content with the current retail channels on offer. However, when they were made aware of other options, they were often very interested in them and could see real benefits in using

them. This was particularly the case for smartcards and Apps, but also extended to new potential retail channels, including supermarkets, post offices and newsagents.

Reaction to the latter (supermarkets, newsagents, etc.) was often quite muted in the qualitative interviews and focus groups: many respondents felt that they would be in the wrong mind-set for purchasing a rail ticket when shopping or using these types of outlets. There was also concern that the staff working in these outlets would not have the right specialised knowledge to help sell the right tickets (this is significant, given that passengers who typically go to a physical place to buy tickets often do so because they value personal service and advice). However, participants in the research also acknowledged that this was a new concept, and that often it is difficult to imagine using a service until it becomes the norm – as such few would rule it out entirely. There is also some precedent for connecting these kinds of retail outlets with ticketing, due to Oyster cards in London which can be purchased and topped up in newsagents and similar outlets. Some passengers therefore felt that simple journeys could be bought from these types of retailers, especially if smartcards become more prevalent for rail travel. Overall we can conclude that, while there is currently little perceived demand for tickets to be made available through retailers like supermarkets and newsagents, there is certainly openness to alternative retailers and retail channels among passengers.

Indeed, the existence of a mix is what seems to be really important here: the different channels that exist currently have different benefits, which appeal to different people. For instance:

- People who prefer to purchase at a station ticket office gave reasons including the desire to speak to a person, and a need for advice about the different ticket options. For these people, the need for assistance also means that purchasing at a station can be quicker (than online for example), and they are more confident of getting the best deal
- People who prefer to purchase online do so for speed and convenience, and because they feel they can get the best deals (either by deliberately comparing multiple options, or through a belief that tickets are genuinely cheaper online). Those who prefer to purchase via an App have similar motivations to those who prefer the internet, but speed and convenience are even more important to these people
- Those who preferred to buy tickets at ticket vending machines usually did so for speed.

In general, personal contact and advice were valued more by older people in the survey (e.g. those aged 55+), and those who travel infrequently, for leisure. The ability to compare options and seek out the best price was also more valued by older people than younger people. Speed and convenience were generally stronger motivations for people aged between 45 and 55, and who travel frequently. These are very broad themes, however, and there are no very clear-cut patterns for which types of passengers like which types of retail channel.

Because there are clear benefits to the current provision of different retail channels, each offering different types of service, and because there is already appetite for newer ways of purchasing tickets (e.g. via smartphone Apps), it is reasonable to assume that facilitating a greater level of choice in where passengers can buy tickets could benefit them further still; certainly it is unlikely to bring disadvantages to passengers. We would also suggest that, while

passengers may be reasonably content with the ticket sales channels currently available to them, because passengers themselves may not (have reason to) think beyond this, consumer and regulatory organisations need to encourage innovation on their behalf.

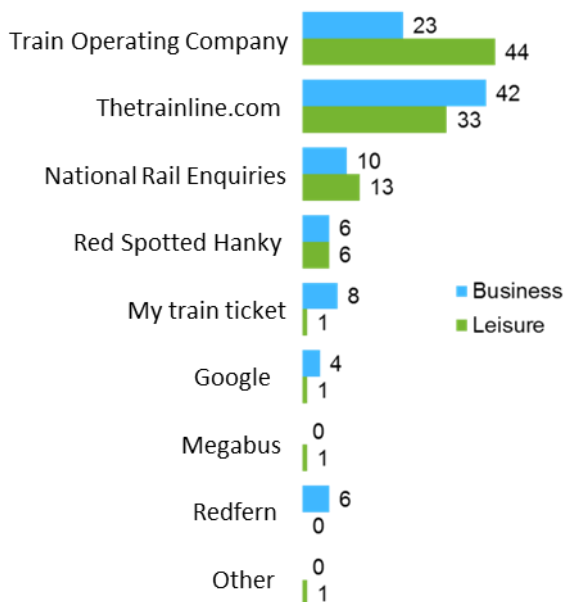
Online retailers

Passengers who purchased rail tickets online were also asked about the particular retailers they used. The chart below shows the retailers used to pay for the most recent journey. TOC websites were the most commonly used overall, followed by thetrainline.com (which is the main retailer used by business travellers). Note, this research did not distinguish between people who went directly to a TOC versus people who bought from a TOC but originally accessed the TOC’s website from National Rail Enquiries. As Figure 8 below shows, some people also see National Rail Enquiries as a retailer in itself.

Fig. 8

Online retailer used for most recent journey (%)

Respondents who purchased most recent journey online, and travelled for business 69, leisure 328 (ORR Retail Review: quantitative online survey)



As we have seen for different retail channels, there is also an indication that passengers are broadly happy with the retailers they use, since on the whole they would prefer to use the same retailers again. However, again, this does not mean there is an absence of openness among passengers for new retailers.

Qualitative discussions with passengers suggested that often the key factor in using a particular retailer for the first time is brand saliency (for example, the discussions suggested that thetrainline.com in particular is so well used because it has created a strong presence through publicity). A perception of offering the cheapest fares is also very important in driving passengers to use a particular retailer for the first time (again thetrainline.com does, if mistakenly, get most of this credit). Some are also attracted by the fact that a retailer claims to

offer all of the ticket options (like a comparison website), or that a particular website/App is easy to use. There also appears to be a very strong sense of habit, whereby once a passenger becomes familiar with a certain retailer, they tend to trust it (for impartial information and guaranteeing the cheapest price) more than others, and perceive that it is easier to use than others. Note that the same reasons for retailer choice were given for all third party retailers. As such, the passenger discussions suggested that there are few genuinely unique benefits which one retailer is perceived to offer over others. But again, having a choice of different retailers appears to be good for passengers.

Users of third party retailers were asked about their knowledge and opinions of the booking fees that are charged by these organisations. While some people felt that these fees were 'cheeky' and unfair, there was a general acceptance (amongst users) that booking charges are simply part of the process. The fees charged for other booking services, for example for theatre or concert tickets, help to make such charges in the rail industry seem accepted (indeed the fees charged on rail tickets are often quite minimal in proportion to the cost of the journey itself and so this is often let pass). Although not common, a small number of people assumed that the fees were an 'admin' charge, for the benefit of bringing together all journey options in a comparison website format, and a further minority thought that fees might be charged for the (mistaken) benefit of offering the cheapest fares on the market.

Impartiality among online retailers

Passengers' reasoning for their use of online retailers demonstrated that, among those using NRE and third parties, impartiality is often taken for granted. These websites are often thought of in a similar way to comparison sites, and so there is an assumption that all possible journey options will be on offer (though only 60% of passengers agreed that third party retailers make available all the possible tickets for every journey). This indicates again that passengers do derive benefits from the current, integrated ticket retail model, which allows and supports impartiality, and fits with the way passengers like (or have become accustomed) to behave. This does not prove that integrated retailing is the best or only possible model for this market, but again it highlights that, should there be a move away from impartial retailing, rigorous consideration would need to be given to ensuring all passengers continued to be protected and/or appropriately educated about how to buy tickets.

While many passengers assume that third party retailers sell all tickets impartially, the opposite assumptions are true for TOC websites. In qualitative discussions, passengers' descriptions of their ticket purchase habits often demonstrated an underlying assumption that train ticket will 'naturally' be bought from the relevant TOC, and when prompted to think about it in the online survey, around 40% of passengers believed that TOCs sell ticket for their own services only. Further, when it was explained (in the in-depth interviews) that all TOCs sell all tickets, regardless of where in the country a journey will run or which company will run it, passengers were often pleasantly surprised. Passengers found this concept of impartial retailing very appealing, for the convenience benefits for customers (and sometimes in terms of challenging negative perceptions of TOCs where these exist):

Really? Well that would be great as you would feel less like they're money-grabbing.

6. Ticket formats and new ticket types

Key findings in this section:

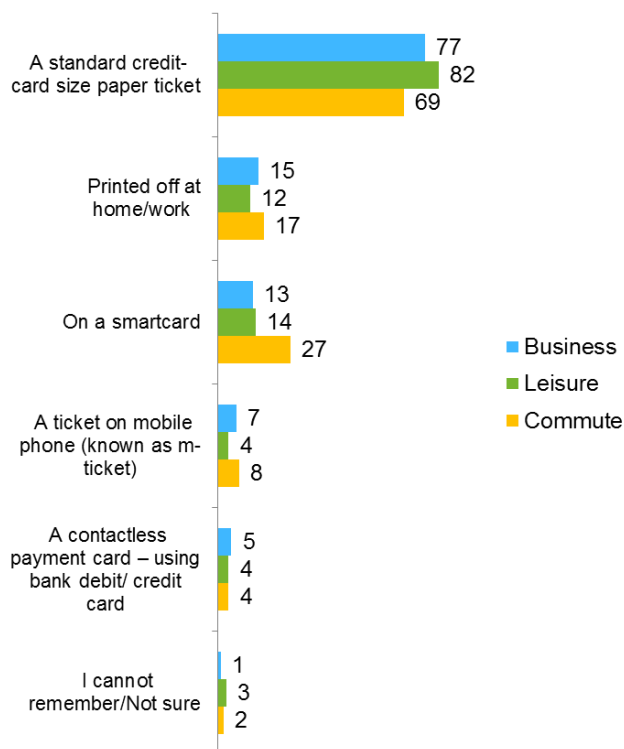
- **M-tickets and particularly smartcards have strong appeal for passengers**
- **Passengers' expectations are for these ticket formats to work in the same fully integrated way that traditional paper tickets do currently (and perhaps even more so). Such expectations will need to be met (with the integrated retail model considered as part of technology developments in the industry) or well managed (i.e. helping passengers to understand the implications of smart tickets, whether or not the integrated model is maintained)**
- **New ticket types such as more flexible seasons are popular, and there are signs that these would fit well with trends in the way that passengers travel.**

Currently, the majority of passengers use traditional paper tickets, most of the time (see Figure 9 below). Smartcards are quite prevalent among commuters, and this is driven by the use of Oyster in London on some overground services within the TfL zones.

Fig. 9

Ticket format used in the last 12 months (%)

Respondents who travelled for business 362, leisure 945 commuting 249
(ORR Retail Review: quantitative online survey)



There is also appetite for using smartcards and M-tickets in the future. For example, 20% of business travellers said they would have liked to have used a smartcard for their most recent similar trip, and 13% said they would have liked to have used an M-ticket. Smartcards are seen to be convenient, allowing passengers to avoid queues for ticket purchase and to speed up the process through ticket gates; there is an expectation that smartcards will bring price benefits, either through 'caps' (with a precedent set by Oyster) or exclusive discounts. M-tickets are also seen to be convenient for similar reasons, and are often felt to be a 'logical' step given the increasing use of smartphones in everyday life, and the ability to use similar tickets in air travel, entertainment and other settings; there is some concern about the implications of smartphone battery life, technology infrastructure (i.e. whether ticket gates will be compatible and on-board inspectors will recognise the tickets) and security, but these are likely to result from inexperience with the format rather than being serious issues. These findings also reflect those found in more extensive research conducted by the DfT and Transport Focus.

There is also substantial interest in other new ticketing ideas, for instance for 'carnet-style' options or for different types of season tickets including Off-peak seasons, weekday-only seasons, 3-day seasons, and so on. Interestingly, of those in this survey who identified themselves as commuting to a regular place of work, only just over half did so three or more days a week. Over 40% of commuters did so regularly, but less than three times a week – these include part-time workers, those who sometimes work from home and those who work in more than one regular location. It is therefore no surprise that different types of season tickets, which offer better deals to regular travellers but without assuming that they travel in the same way every day, seem popular.

Passengers' expectations around these new ticket types and formats may have implications for integrated retailing if it was to continue. There are assumptions that smart tickets and M-tickets will operate in similar ways to traditional paper tickets, i.e. where there are assumptions about flexibility in terms of time, inter-availability by TOC, and validity across a number of possible routes, these carry through to other ticket types as well. For smartcards in particular, there was a sense among passengers in this research that these would be relevant within a local authority or region – possibly prompted by the (perceived) seamless use of Oyster across all of London. This means that they will expect such tickets to be valid on all routes within a region (and possibly across different modes of transport). As these new formats and ticket options are rolled out in more places, it will be important that passengers' expectations are met (for example via current work to enable inter-operability of M-tickets), or that retailers manage these ideas well by promoting passengers' awareness of what the tickets actually offer.

7. Conclusions

This research has shown that, in many ways, the current rail ticketing market works reasonably well from a passenger perspective:

- While there are some issues around the perceived complexity of tickets, and certainly around price, on the whole most rail passengers feel reasonably content with the main types of ticket which are currently available. The range of ticket types provides for a degree of flexibility around time of travel when this is required, and also for cheaper but time-restricted travel, for which passengers understand the trade-off and appreciate the existence of this option. The current ticket market also provides optional flexibility by TOC, from which passengers perceive similar benefits. In particular, although they are often unaware of the concept, there is evidence that passengers benefit from and value the concept of through-tickets
- It is clear that passengers benefit from having a range of different channels through which to purchase tickets, and indeed a range of different retailers within those channels. Different outlets provide different service features, which are appreciated by different types of passengers (an obvious example being that some passengers like or need to speak to another person to help them purchase an appropriate ticket, meaning telephone sales lines or station ticket offices have an important role; while others wish to purchase at their own convenience without needing to leave home, meaning online services are desirable).

An important theme here is choice. Passengers like to have, and benefit from different options, in all aspects of ticket retailing; and this is quite well provided for in the current market. This does also suggest, however, that there could be room for innovation – to promote more choice. Indeed, the research participants were certainly very interested in new or different types of ticket (more flexible seasons, for example) and new formats like smartcards and mobile tickets, and they demonstrated openness to other types of retailer in some circumstances.

Furthermore, this study has indicated that integrated retailing provides a variety of other important benefits to passengers:

- Although price is an extremely important factor in which type of ticket they buy, and where and how they buy it, they do value the option to be able to buy flexible and inter-available (including through-) tickets, on the many occasions when their journey circumstances require this flexibility
- The availability of time-flexible and TOC/route-flexible tickets, as well as impartial retailing, also provide passengers with significant protections (despite the fact that many passengers are unaware of these things), and a high degree of 'forgiveness' when they do not fully register all of the features and terms of a ticket

For all of the reasons above, a change away from the integrated model would likely be quite disruptive to passengers, and would require significant effort from organisations across the rail industry to ensure that consumers can continue to be protected and empowered, given their low level of understanding and awareness of ticketing, TOCs and how integrated ticketing works.

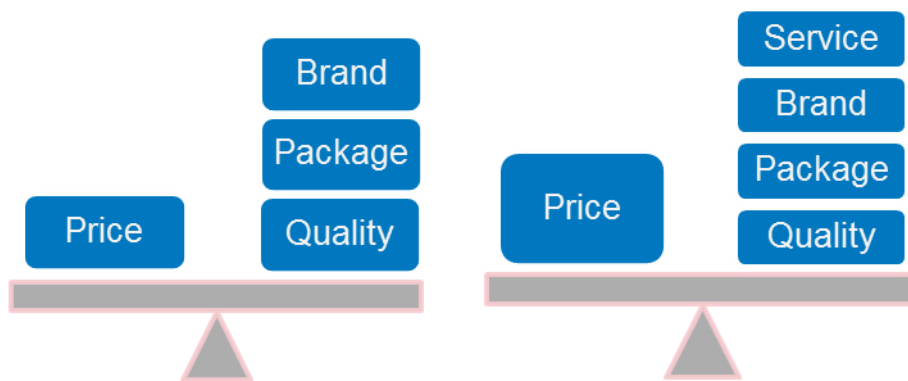
However of course, behaviour change is not unheard of, and this research does not suggest that ticket retailing could not be improved, either by changing the model dramatically, or improving and enhancing aspects of the current system. Indeed, if the integrated retail model is maintained, there are important considerations for how it is taken account of and optimised as part of innovations like smart and mobile ticketing, for example.

The research has also highlighted that often passengers do not think in detail about their train tickets. It is partly for this reason that they appear to be reasonably content with the tickets on offer, and the places and formats in which they can purchase them. However, when they are made aware of different ways to buy and use tickets, they are often very open to new ideas and find them very appealing. As such, we suggest that, even if passengers themselves do not 'engage' strongly with the market and demand more of it, it is important that innovation is encouraged and facilitated. This may need to be done by consumer and/or regulatory organisations on passengers' behalf.

8. Appendix 1: Conjoint technique

It is possible to directly ask respondents which aspects of a ticket are most important to them. However, what survey respondents say is important, and what really matters to them, are not necessarily the same. Research has shown that respondents often over-emphasise the importance of price, or the most positive or 'acceptable' features, or, more commonly, they say that every aspect is important to them. Additionally, for complicated product or service offerings, direct questioning can be cumbersome and confusing.

Conjoint circumvents these problems and also provides a wealth of useful, clear information and powerful modelling capabilities. Conjoint forces respondents to trade off different aspects of a service offering against each other; this technique employs a more realistic context for respondents to evaluate potential product profiles. It captures what really drives consumers to choose one offering over another, and what they really value.



Choice-based Conjoint (CBC) works well when a service offering is experienced as a 'package'. This is relevant for rail tickets where, in reality, passengers weigh up the time of travel, price of the ticket and other factors such as number of changes and overall duration. Respondents see a number of 'pre-packaged' product profiles and select which one they would be most likely to take up (plus 'none of these' option). The pre-packaged profiles are made up of a number of features or attributes, and each attribute is then described by a number of levels. Once respondents have chosen their preferred package from each of a series of sets, analysis can be conducted to understand which features are driving those choices. This means the influence of each feature is assessed within the context of other features. The result is a utility or importance score for each feature to describe their relative influence on choice. It is also possible to determine the appeal of each level, within each feature.

For rail tickets, in this survey we broke the package down into:

- Degree of flexibility in terms of time
- Degree of flexibility in terms of TOC
- Degree of choice in terms of ticket format

- Whether or not they would receive a single (through) ticket, or would need separate tickets for each leg
- Whether or not they needed to purchase the ticket in advance, or could choose to purchase it at any time between 'now' and the time of travel
- Price.

These features were themselves broken down as follows:

	Route / TOC flexibility	No. separate tickets	Time of travel	Ticket price	Ticket format	Time of ticket purchase
Level 1	From Milton Keynes to Birmingham travel on Virgin Trains Virgin Trains services leave Milton Keynes every hour. Whole journey takes 2h 17min	Buy one ticket for the whole journey, from one place and in one payment transaction	Any time tomorrow	£27.50	Paper ticket	Book at least the day before travel (today)
Level 2	From Milton Keynes to Birmingham travel on London Midland London Midland services leave Milton Keynes every hour. Whole journey takes 2h 45min	Buy two separate tickets , one for each leg of the journey. Make two separate payment transactions	Travel any time during off-peak hours tomorrow	£34.40	Choose paper ticket OR ticket on a smartcard	Buy ticket any time between now and boarding the train
Level 3	From Milton Keynes to Birmingham travel on any train, run by any company . Services leave Milton Keynes every half hour. Whole journey takes either 2h 17min or 2h 45 min , depending on which train you choose		Ticket valid for specified train only	£41.30	Choose paper ticket OR ticket on your smartphone or tablet	
Level 4				£48.20	Choose paper ticket OR ticket you can print off yourself (e.g. at home or work)	
Level 5				£55.00		

The exercise in this research was as follows:

1. Respondents were asked to imagine a hypothetical journey that they were to make on the following day. This journey was chosen because it involves two legs, and it is possible to use more than one TOC on one of the legs (but it is not so complicated that there are more possible options than this).
2. Some respondents were told to imagine the journey would be for business reasons, and some for leisure reasons (depending on their typical travel behaviour as identified in earlier questions)
3. Some respondents were told that they would need to arrive in Worcester by a particular time, some were given partial flexibility, and some were told that they could arrive at any time during the day
4. Each respondent was presented with three ticket options, in which the following features of the ticket were stated:
 - Degree of flexibility in terms of time

- Degree of flexibility in terms of TOC
- Degree of choice in terms of ticket format
- Whether or not they would receive a single (through) ticket, or would need separate tickets for each leg
- Whether or not they needed to purchase the ticket in advance, or could choose to purchase it at any time between 'now' and the time of travel
- Price

Note that the scenarios did not cover all possible variables that a passenger might consider (for example, provision of catering, availability of First Class, etc.), but focussed on key variables of interest to this review (which were also supported as important by the qualitative research).

The full scenario, and an example of how the ticket choices were presented to passengers, is shown on the following page.

5. The details of each feature were varied across each of the options, and respondents were asked to choose which of the three options they would choose for the stated journey (if any)
6. This was then repeated several times, with three different ticket options being presented each time
7. Across the sample as a whole, a large number of different combinations was tested, allowing us to derive, overall, which features of the tickets provided as a choice to passengers have most impact on whether a person chooses that ticket or not.

CONJOINT EXERCISE

Please imagine that you are going to make a train journey from Milton Keynes to Worcester tomorrow, for [LEISURE / BUSINESS]. We realise that you may not make this specific journey in real life, but please try to imagine an occasion where you might do this.

If you were to travel from Milton Keynes to Worcester, there would be some different options for making this journey by train. You would travel from Milton Keynes to Birmingham, and then change at Birmingham before travelling on to Worcester. For the first part of the journey, between Milton Keynes and Birmingham, you would travel on either a London Midland service or a Virgin Trains service; for the second part of the journey, between Birmingham and Worcester, you would travel on a London Midland service.

If you used the Virgin Trains service on the first leg, this leg would take just under an hour, meaning the whole journey would take around 2 hours 17 minutes.

If you used the London Midland service on the first leg, this leg would take around one hour and a half, meaning the whole journey would take between 2 hours 30 minutes and 2 hours 45 minutes.

Please click "next" to go to the next screen.

NEW SCREEN

Please imagine that you will be making a journey from Milton Keynes to Worcester tomorrow, for [LEISURE/BUSINESS] reasons and would:

- A. need to arrive before 9am*
- B. need to arrive before 11am*
- C. need to arrive any time in the morning*
- D. need to arrive any time in the afternoon*
- E. need to arrive any time during the day*

[EACH RESPONDENT GIVEN A DIFFERENT TIMING SCENARIO]

NEW SCREEN:

Q19b Here are some different options for the ticket you could buy for this journey. Which of these options would you be most likely to choose? [SEE OVERPAGE]

We realise that you may not make this journey in real life, but please try to imagine this and choose the option that would be best for you personally if you did. Therefore, please don't choose the 'none of these' options just because you wouldn't make this journey in real life. Please only select this option if you feel that none of the other options would suit you IF you were to make this journey.

	Option 1	Option 2	Option 3	
Route / TOC flexibility	Between Milton Keynes and Birmingham you must travel on a London Midland service Then travel from Birmingham to Worcester on a London Midland service London Midland services leave Milton Keynes every hour, and the whole journey will take around 2 hours 45 minutes	Between Milton Keynes and Birmingham you must travel on a Virgin Trains service Then travel from Birmingham to Worcester on a London Midland service. Virgin Trains services leave Milton Keynes every hour, and the whole journey will take around 2 hours 17 minutes	Between Milton Keynes and Birmingham you can travel on any train, it doesn't matter which train company runs the service. Because you can travel on any train, these services leave Milton Keynes every half hour. Then travel from Birmingham to Worcester on a London Midland service The whole journey will take either 2 hours 17 minutes or around 2 hours 45 minutes, depending which train you take - but this is your choice.	None of these
No. separate tickets	You need to buy two separate tickets, one for each leg of the journey, and you need to make two separate payment transactions	You can buy one ticket for the whole journey, from one place and in one payment transaction	You need to buy two separate tickets, one for each leg of the journey, and you need to make two separate payment transactions	
Time of travel	This ticket will allow you to travel at any time during the day tomorrow	This ticket will allow you to travel at any time during off-peak hours tomorrow	When you have decided on what time you want to travel, your ticket(s) will only be valid for specified trains. (You will not be able to travel half an hour earlier or later, for example, once you have bought the ticket)	
Ticket price	£41.30	£41.30	£55.00	
Ticket format	You can use a traditional paper, credit-card sized ticket (you would need to buy or collect this so that you have a physical ticket), OR you can choose to load the ticket onto a smartcard	Your ticket will be the traditional paper, credit-card sized ticket. You would need to buy or collect this so that you have a physical ticket.	You can use a traditional paper, credit-card sized ticket (you would need to buy or collect this so that you have a physical ticket), OR you can choose to load the ticket onto a smartcard	
Time of ticket purchase	You must book your ticket at least the day before you want to travel (today)	You must book your ticket at least the day before you want to travel (today)	You can buy your ticket any time between now and just before you board the first train	

Once respondents had made their choice, they would then be shown further sets of different packages, making their choice from each in turn. Individual passengers would not need to see all possible variations, since analysis can be conducted from the sample as a whole, across which all relevant combinations would be shown.

9. Appendix 2: Glossary of terms

Term	Explanation
ABC1	Grouping of the most affluent socio-economic groups, ranging from higher managerial to clerical or supervisory occupational classes.
DfT	Department for Transport
Impartial retailing	Retailers selling a range of fares for both their services and the services of (other) TOC, without discriminating in favour of their own services or preferred services.
Inter-available ticket	A ticket that enables passengers to benefit from the flexibility of being able to use different TOCs, flows and terminals, depending on their preferences at the time of their journey.
M-ticket	Mobile tickets are downloaded to a smartphone, tablet or other mobile device
NRE	National Rail Enquiries
ORR	Office of Rail Regulation
Passenger Focus	The independent transport user watchdog (re-named Transport Focus as of 30 th March 2015).
Smart ticket	Ticket loaded onto a contactless smartcard, e.g. an Oyster card
Split Ticketing	Split ticketing is the practice of buying two or more separate tickets for a journey, i.e. for the purposes of ticketing, splitting up a longer journey into a series of shorter journeys.
TfL	Transport for London
TOC	Train Operating Company, e.g. South West Trains
Third party retailer	A third party retailer sells train tickets to passengers and businesses without running the train services themselves.
Through Ticket	A through ticket fare enables passengers to travel across the network, buying and using only one ticket to do so.