

Long Distance, Simpler Fares

Transport Ticketing Global 2025



BRADFORD 2025
UK City of Culture



Years of Train Travel
Since 1825

Our vision for simpler, smarter
and fairer fares for all



LNER
LONDON NORTH EASTERN RAILWAY

LNER

LONDON NORTH EASTERN RAILWAY



Lisa Woodley

Senior Programme Manager



Gareth Davison

Revenue Management Lead

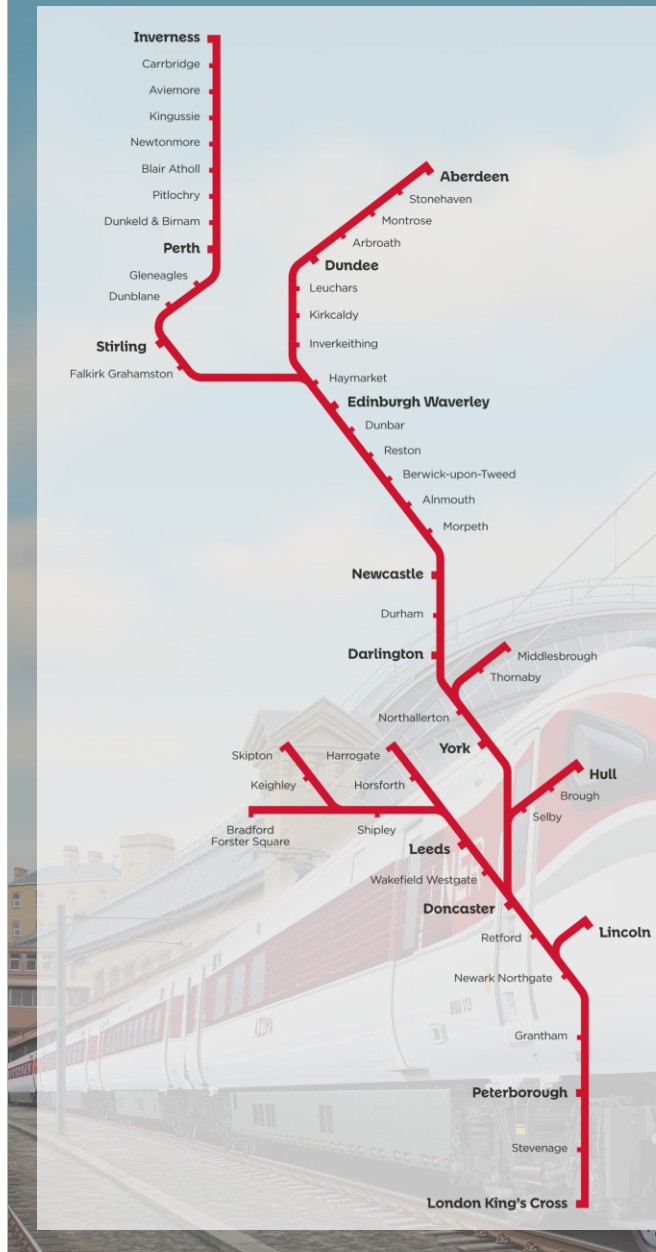
LNER

LNER

LONDON NORTH EASTERN RAILWAY

2000TM

Years of Train Travel
Since 1825



LNER

Rail is complex and confusing

1,000

Ticket Names

2,700

Ticket Types

650

Off-Peak
Restrictions

The need for change

84%

of people want change

Source: RDG

35%

of people are put off rail because
they find it difficult to find the right fare

Source: RDG

“COMPLEXITY”

“CROWDING”

“FLEXIBILITY”

“VALUE for MONEY”

- A brighter future for customers



**One clear
price**



**Guaranteed
seat**



**Affordable
flexibility**



**Change
plans**



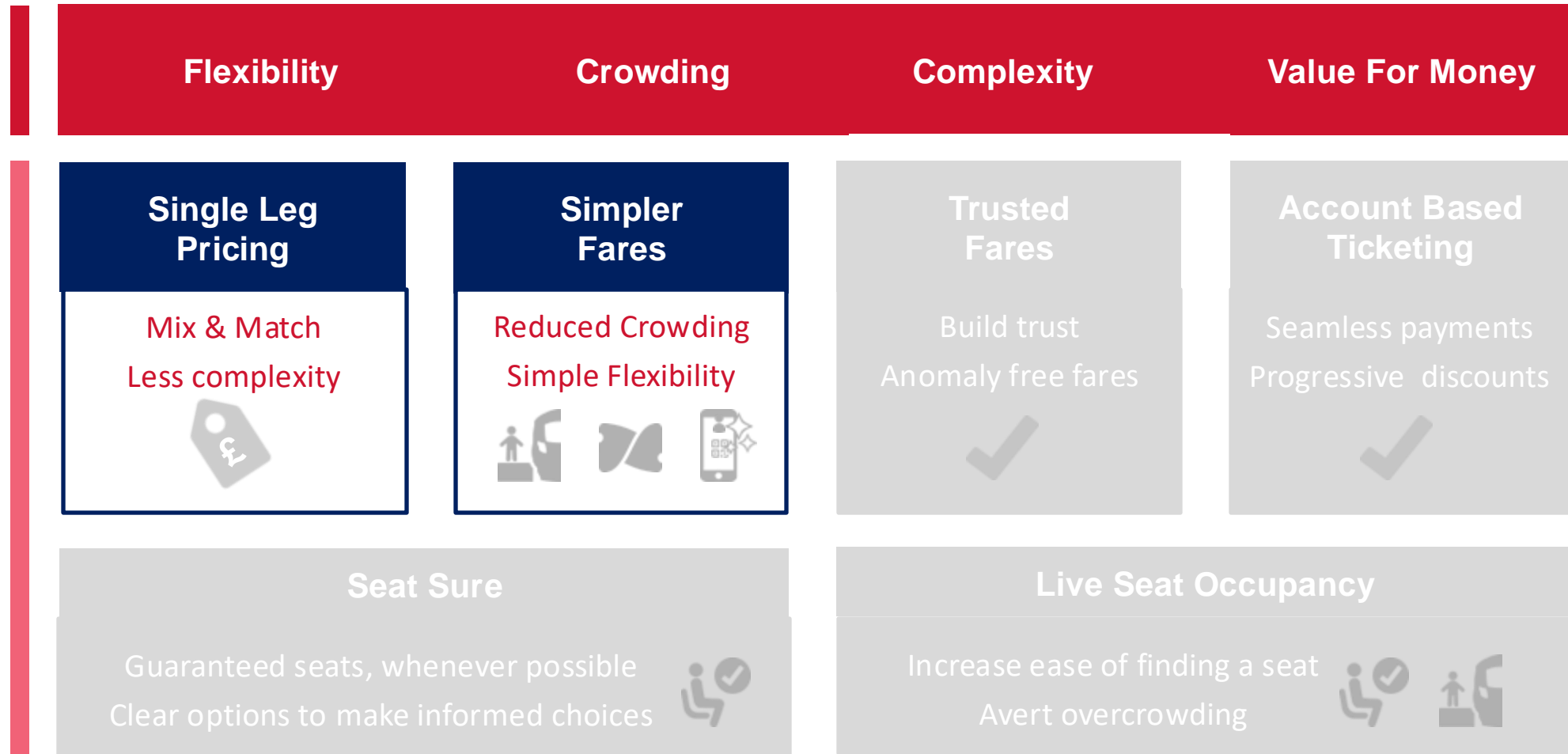
**Reduce
crowding**



**Best fare
guarantee**

- The steps towards simpler, fairer fares

Fares Reform Projects
linked to...
Customer benefits



Fares Reform Pathway

Single Leg Pricing


June 2023

Simpler Fares Phase 1a

January 2024

Simpler Fares Phase 1b

& Connections August 2024

		Legacy Pricing	Single Leg Pricing	Simpler Fares
 <p>Clearer options</p>	First Class	Anytime		
		Off-Peak		
		Anytime	Anytime	
		Off-Peak	Off-Peak	Anytime
		Advance	Advance	Advance (+70 Min Flex)
		Anytime	Anytime	Anytime
		Super Off-Peak	Super Off-Peak	Advance (+70 Min Flex)
		Advance	Advance	
		Anytime		
	Standard	Off-Peak		
		Super Off-Peak		
Ticket type quantities		23	11	6

are called
Min Flex

- Retail Impact

- When investment is made in the retail experience to support a modernised fares structure, it works:
 - LNER Direct channels, revenue benefit versus control flows is **well above forecast**
 - Across all retail channels revenue benefit slightly **lower than forecast, but still positive**
 - One challenge continues to be visibility of the new fare on non-LNER retail channels

Outward Journey

< 23 Mar

Mon 24 Mar

25 Mar >

Standard		First Class	
Earlier trains	Fixed Only valid for the booked train(s) shown on ticket	Semi Flexible Valid to start journey up to 70 mins earlier or later than booked	Fully Flexible Valid to travel at any time of day by the route & train operator
	Depart > Arrive	More	
12:27 > 15:38 3h 11m, Direct	£54.70	£74.70	£200.80
	View all fares	Only 8 left	Only 8 left

Add Flexibility

<input checked="" type="checkbox"/> Out +£20.00 1 adult	<input type="checkbox"/> Return +£20.00 1 adult
Newcastle to London Kings Cross Travel on any valid train(s) when your first train departs between 11:17 - 12:27	London Kings Cross to Newcastle Travel on any valid train(s) when your first train departs between 13:50 - 16:10
Hide options Ticket restrictions >	Hide options Ticket restrictions >
Available trains you can take: 11:31 direct 11:58 direct 12:27 direct Current train 12:58 direct 13:30 direct	Available trains you can take: 14:00 direct 14:30 direct 15:00 direct Current train 15:27 1 change 15:30 direct 16:00 direct
Total payable	£163.10
Continue Cancel	

- '70 Min Flex' Customer Behaviour

80% of customers who bought the 70min Flex travelled on original booked train

10% of Direct Bookers use the dedicated digital flexing tool to swap trains and find seats

75% of 'digital flexing' is occurring within 24hrs to departure (50% within 2 hours)

3 times more customers are flexing onto earlier trains rather than later trains

Majority of flexing is occurring in Northbound direction (homeward)

- Customer Assurances

At least 2/3 of all "Fixed" tickets sold will be priced at less than half the price of the Fully Flexible ticket

A maximum of 10% of all "Fixed" tickets will be sold at 80% or more of the Fully Flexible price

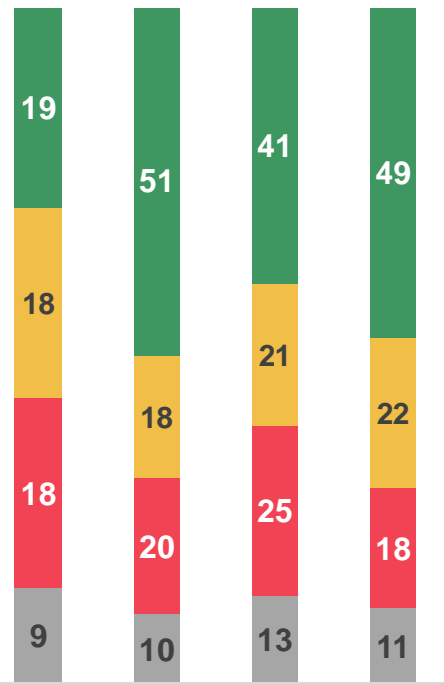
90%

0.2%

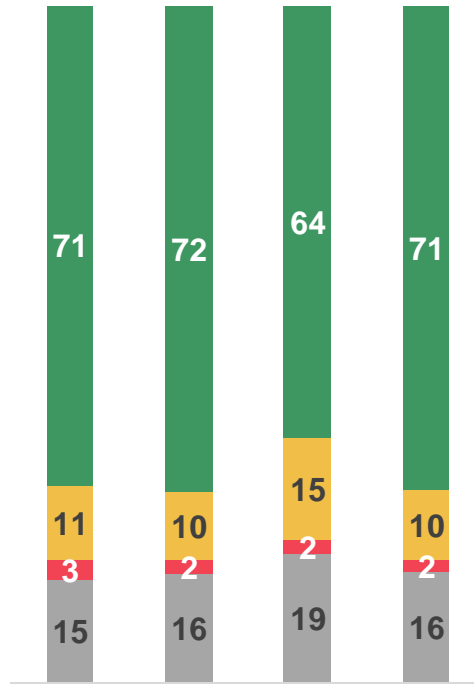
Customer Research

Overall, the Simpler Fares structure is viewed positively compared to the old structure, although LNER customers are less positive than train considerers

LNER Customer Panel



Train Considerers



NET Better No difference NET Worse Don't know

"It was easy to change my booking on the new flexible 70 min ticket and the train ran to time."

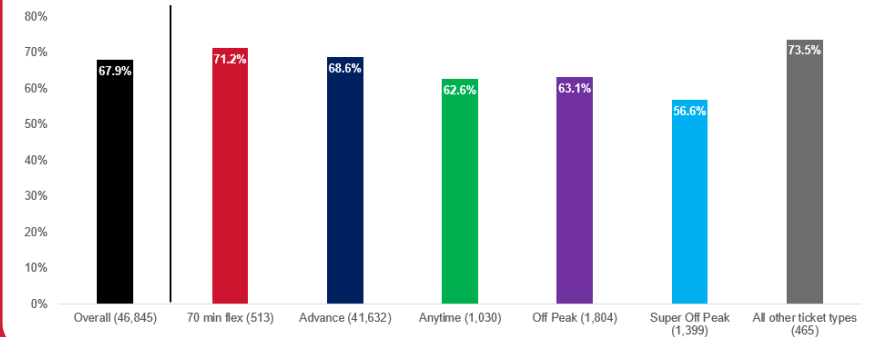


David JM Orr · 8:59 pm

Good Morning David We are opening a 2nd hotel in Edinburgh soon so I am travelling a lot on your trains. Can I say that in over 30 years travel on business at last a flex option with the 70 minutes flexible pilot, so many positives, great idea, at last a clear differentiator.... bravo

* 513 respondents of 70min Flex

Overall CSAT is higher for those customers who purchased the 70 min flex ticket type



Responses from 06/02/24 - 08/02/25

LNER

"Got the Semi-Flex ticket, arrived at Kings Cross 45 mins early and got on to an earlier train in coach C unallocated seats."

"... 70 min flex tickets are absolutely great. I decided to take the train earlier within the 70 minute limit."

CSAT - Customer Satisfaction Score

LNER

- Simpler Fares in a nutshell



1. Successfully in pilot for over 1 year and now includes connectional services
2. Commercials are positive but could be better if all retail UX was optimised
3. Customers generally favourable towards the new 70min Flex
4. Commercial and Customer evaluation continues as we test the limits of unconstrained pricing
5. Further expansion planned for later this year including more stations

Find out more at: lner.co.uk/simplerfares

Thank you



Lisa Woodley

Senior Programme Manager, LNER

Lisa.Woodley@lner.co.uk



Gareth Davison

Revenue Management Lead, LNER

Gareth.Davison@lner.co.uk

LNER