

Off-peak Friday fares

Our trial of off-peak fares on London's transport network between 8 March and 31 May 2024

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global



ff-peak
Friday fares

BREAKFAST DATE
 GET-TOGETHER
 GOING OUT
 COFFEE & CHAT
 MUSEUMS
 TEAM LUNCH
 SHOPPING
 EXHIBITIONS
 GIE TIME

Make the most of Fridays and save money on your travel. Pay as you go single fares on Tube, DLR, London Overground, Elizabeth line and some National Rail journeys in London are now off-peak all day, every Friday, from 8 March.


That is how the Mayor of London and TfL are making travel more affordable.

For great Friday deals visit tfl.gov.uk/deals

#LetsDoFridays

Trial ends 31 May. For terms and conditions visit tfl.gov.uk/fares

MAYOR OF LONDON



TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS



Background

The rationale and basis for launching our off-peak Friday fares trial

Innovative solutions

Our ambitions and plans for the off-peak fares trial

London has seen a strong recovery from the pandemic, with ridership once again near to pre-pandemic levels. This recovery has been stronger at weekends, where leisure travel has bounced back and often exceeds pre-pandemic levels. However, the position varies during weekdays depending on the day, with ridership on Fridays having the greatest disparity, particularly the morning peak.

Business groups, businesses and others have been advocating for fares to be restructured to better align with hybrid working. While most stakeholders accept that Oyster and contactless already provides a flexible system, there is appetite to consider more options while ensuring that the network remains inclusive and accessible to all.

In 2023, we ran a survey of 110 businesses to see what they would like us to do to support the move to hybrid working.

Restructuring fares to incentivise travel on quieter days was the top result (28 per cent), closely followed by providing a safe and reliable service (25 per cent).

A new approach

Between 8 March and 31 May 2024, the Mayor of London, Sadiq Khan, introduced a trial on London Underground, London Overground, Elizabeth line and DLR, as well as some National Rail services, where fares on Fridays were set at off-peak levels throughout the day. Due to how this was implemented, restrictions on 60+ Oyster photocard and Older Persons' Freedom Pass were also removed, meaning users could travel free of charge before 09:00 on Fridays.

The Mayor wanted to explore whether reducing fares on Fridays impacts ridership and revenue and whether it has an impact on London's wider economy.

Journeys made on our rail services during morning peak hours (millions)



60%
of London businesses want more information on fares and flexible ticketing for their staff



0.4million
fewer journeys on our rail modes during morning peak hours in 2023 compared with 2019



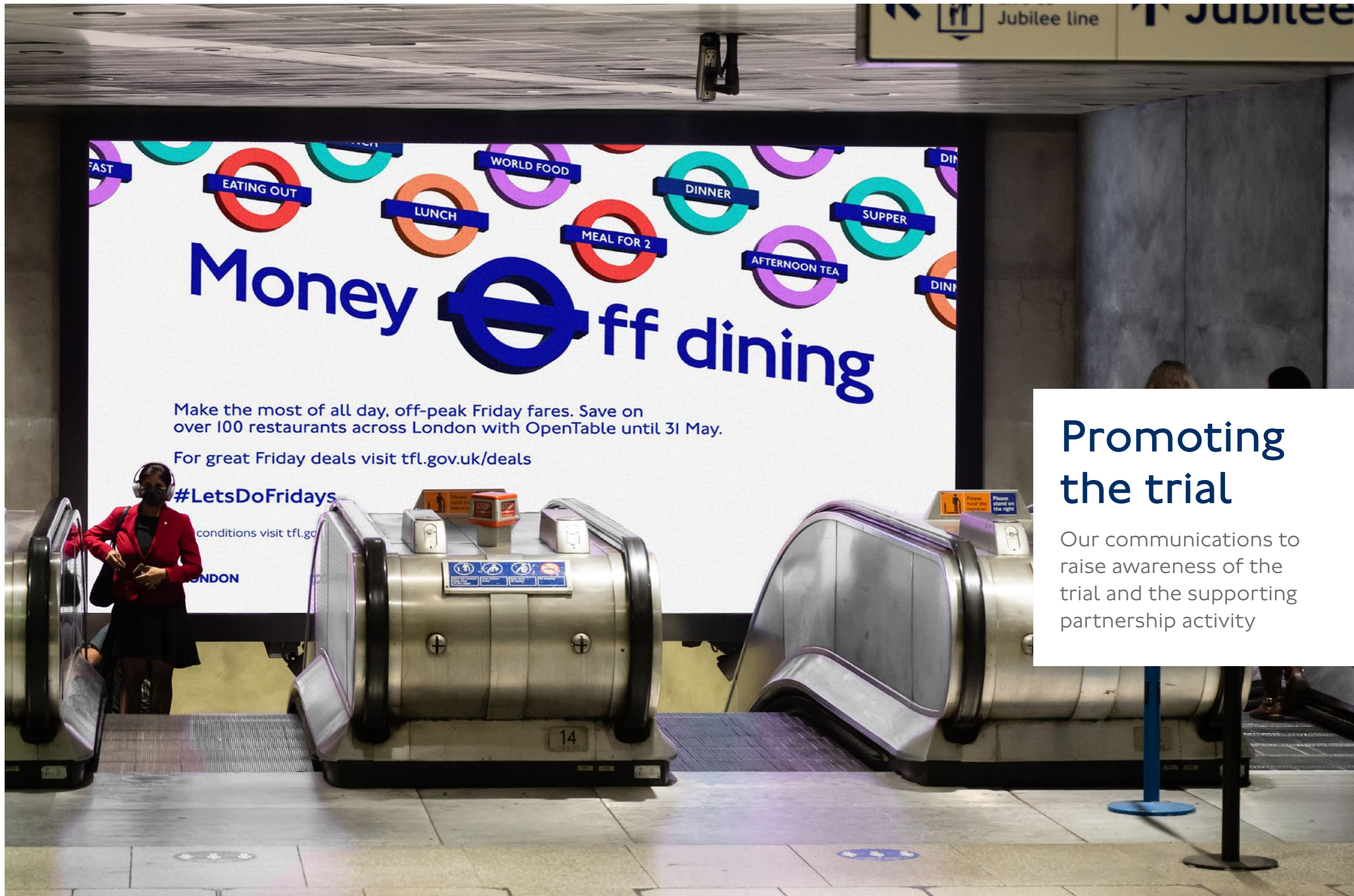
90%
ridership levels on our public transport network compared with pre-pandemic levels



‘Encouraging more people back into the city on Fridays could give a much-needed boost to the hospitality, business and leisure sectors, supporting London’s wider economic growth as we continue to build a fairer, greener and more prosperous London for everyone’

Sadiq Khan
Mayor of London





Promoting the trial

Our communications to raise awareness of the trial and the supporting partnership activity



Positive engagement

We promoted the off-peak Fridays trial through customer and stakeholder communications and a range of partner discounts

The trial was communicated to businesses, stakeholder groups and Londoners through a variety of communications including email briefings and round tables with business groups, employers and landowners; broadcast, print and digital advertising and press releases to the news media.

Support for the trial was drawn from across the business community including Business LDN, South Bank Employers Group, City of London Corporation and Heart of London Business Alliance, Better Bankside, Camden Town Unlimited, Team London Bridge and Primera Business Improvement Districts.

We ran a range of campaigns during the trial to promote the messaging and encourage Londoners to take advantage of off-peak Friday fares. Our activity was impacted by the pre-election period ahead of the Mayoral election on 2 May, during which time messaging was limited and factual.

We ran a number of special deals to give people even more incentive to travel into London on Fridays and enjoy all that the city has to offer.

‘Fridays have suffered as a result of changes to working patterns since the pandemic and hospitality businesses have felt that loss of commuter trade. Responding to these challenges with innovative trials like off-peak Fridays is exactly the type of flexible approach needed to boost journey numbers and stimulate footfall in our venues’

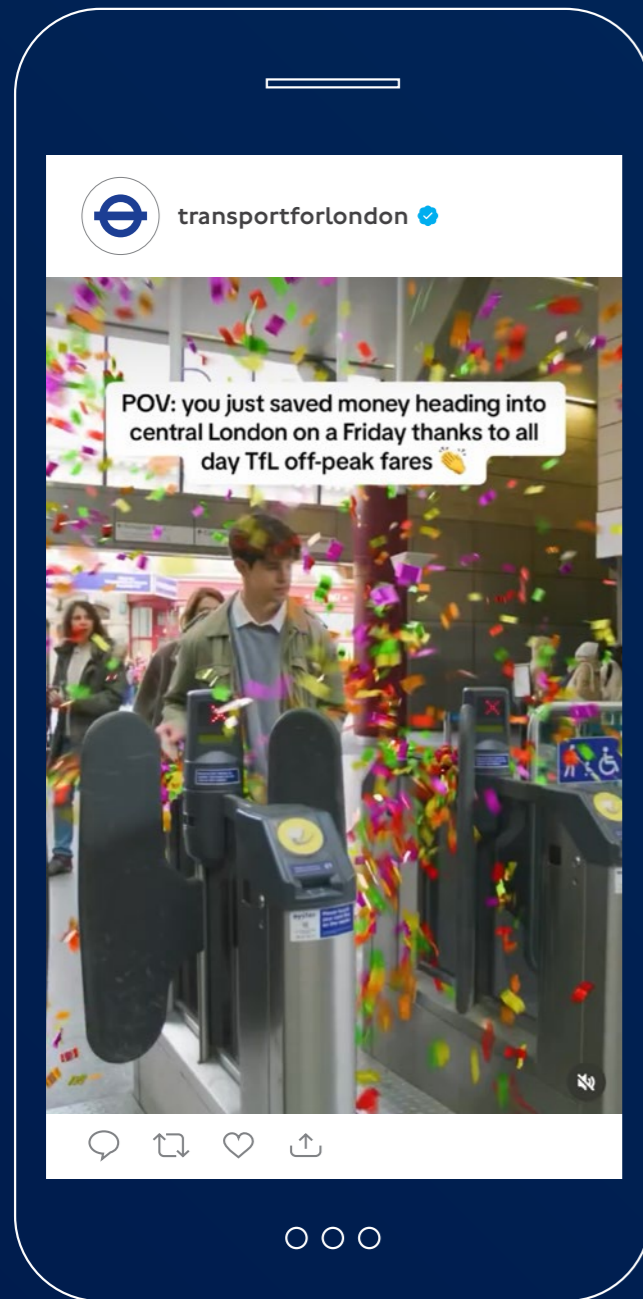
Kate Nicholls
Chief Executive, UKHospitality



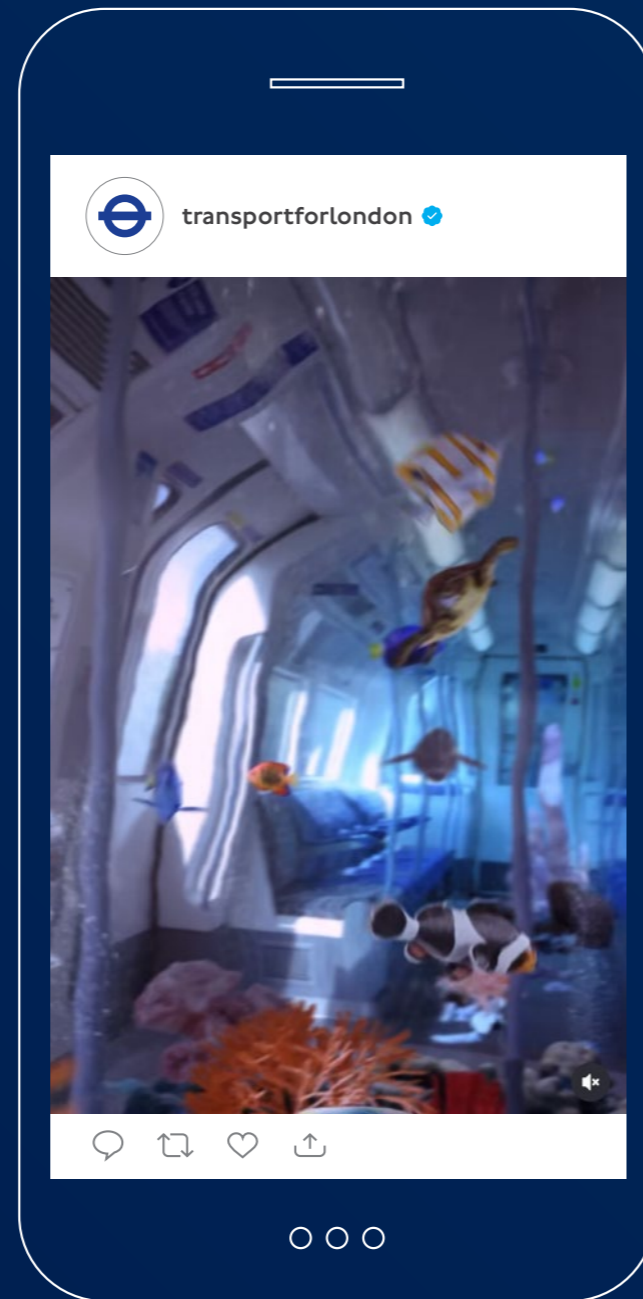
600,000

views of the social media content

Social media



An immersive campaign



Augmented reality promoting the SEA LIFE London Aquarium

‘Off-peak Fridays have definitely encouraged my family and I to use the Tube more on a Friday! Before, we booked a lot of things for the weekend, making it really cramped and leaving not enough time for leisure. With off-peak, it makes it easier to go into central, particularly because it was cheaper fares but the same amount of transport available’

Pineapple_72
Talk London
community member

‘We rely heavily on commuter trade and we’re just not getting that traffic on Fridays. We also see a pattern of people coming in late mornings to avoid peak travel costs, so I believe a trial of off-peak fares all day on Fridays would be a welcome change. Giving people one more reason to travel into town would also bring a much-needed boost to small businesses’

Charlotte
Gramos Coffee Bar at
King’s Cross St Pancras
Tube station

METRO

New off-peak Fridays

CUSTOMERS can benefit from off-peak Tube and train fares using pay as you go with contactless and Oyster on Fridays, as part of a trial from the mayor and TfL.



Metro

THE SUNDAY TIMES

Tube fares to be slashed on Fridays to get workers back into the office and revitalise London's nighttime economy

SADIQ KHAN HAS HELD TALKS WITH TfL ABOUT HOW TO WOO HOME WORKERS BACK TO CITY

The Sunday Times

THE Sun

FRIDAY FARE CUT

London Tube and train fares could be slashed on Fridays in bid to boost passenger numbers



The Sun

BBC

Off-peak Friday fares trial begins on TfL network

A scheme trialling off-peak fares all day on Fridays on the Transport for London (TfL) network has begun. City Hall hopes the reduced fares will attract workers into the office and boost the hospitality and cultural sectors.

BBC

Productive partnerships

Our partners help promote and push the off-peak Fridays message

To inspire people to engage with our message of 'Let's do Fridays!', we launched a range of exciting offers, activities and competitions with our partners. This included a headline partnership with OpenTable, providing a wide range of restaurant deals to encourage Londoners and visitors to visit London on Fridays. The OpenTable offers were hosted on a bespoke webpage.

London & Partners, the capital's business growth and destination agency, also created a new Visit London webpage where people could see a range of exciting offers from restaurants, museums, theatres and landmark attractions available on Fridays during the trial.

Visit London, London's official visitor guide, also promoted the off-peak Friday fares and offers across its channels including social, newsletters and on its app.

We also had a special page on our website, including 15 per cent off pre-booked tickets for the IFS Cloud Cable Car during off-peak Fridays and a range of offers available to visit London leisure attractions at discounted prices if travelling there by public transport.



140+
restaurants offered special Friday dining deals

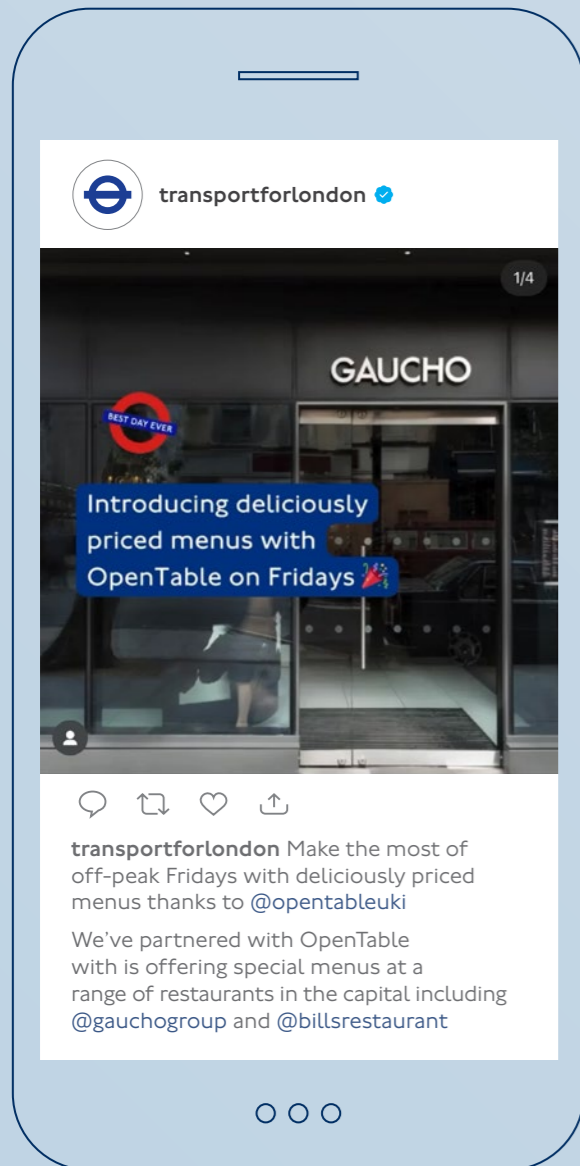


64,000
visits to the [tfl.gov.uk/deals](https://www.tfl.gov.uk/deals) webpage

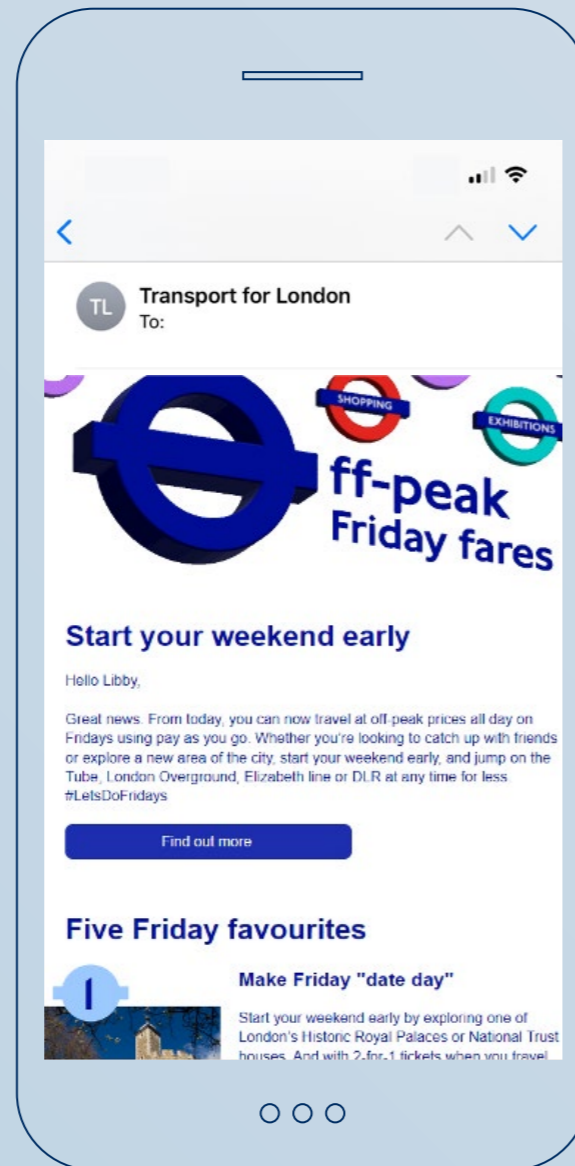


25
partner offers included on the Visit London webpage

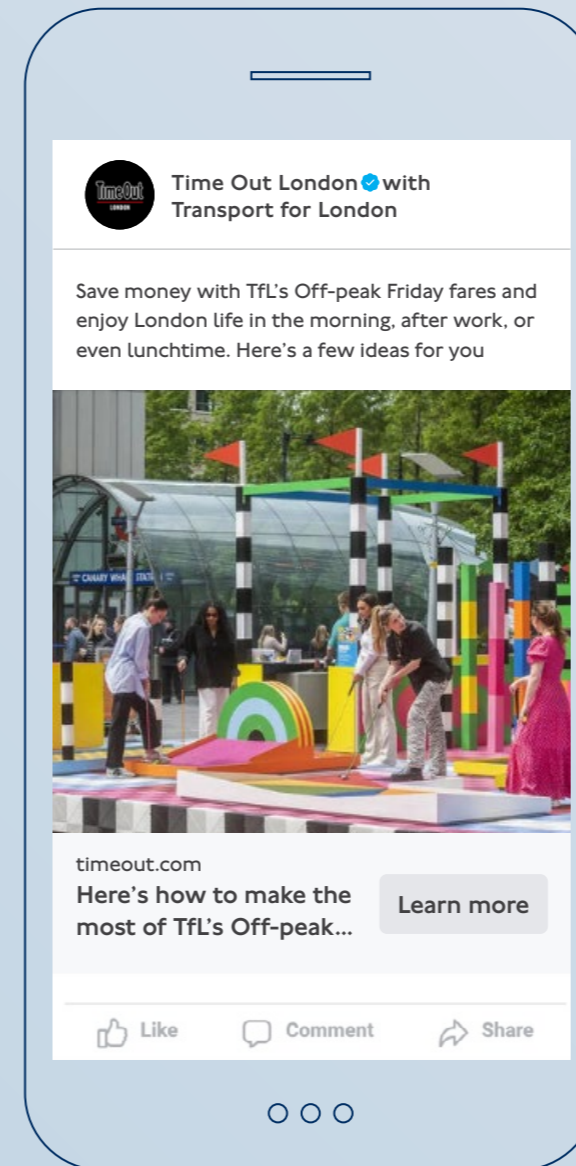
Promoting our partnership offers



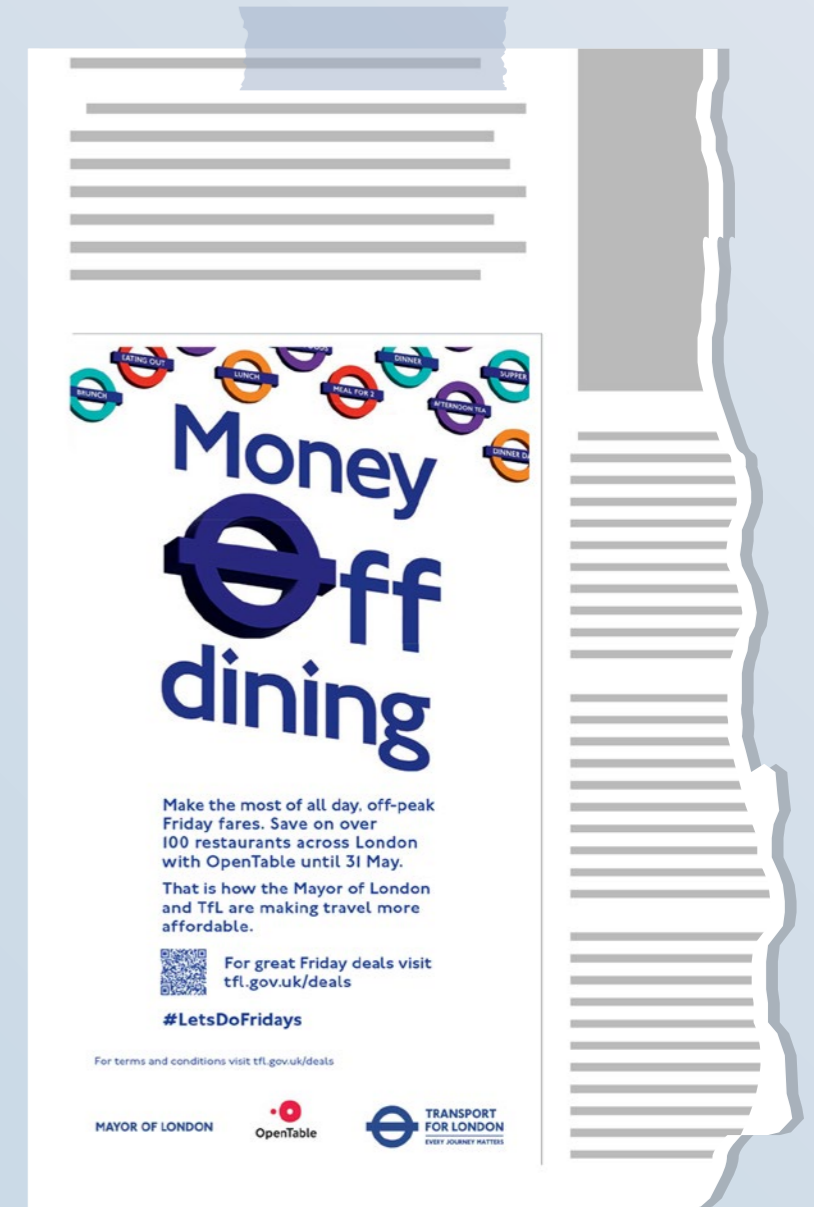
Supporting OpenTable



Direct emails to customers



Our partnership with Time Out



Our partnership press adverts

Promotion through our communications channels

We used a number of channels to help raise awareness of the trial and the partner offers

Our communications started one week before the trial launched in March, and ran until May 2024, with a lower volume of communications during the six weeks before the Mayoral election. We ran radio adverts, print and digital posters, online videos, and press and social media advertising to promote the trial and supporting offers.

Our social media campaign saw us create immersive augmented reality content, such as confetti cannons in stations, and underwater scenes on Tube trains. We also ran competitions and special offers through our social channels.

Awareness of the trial was good, reaching more than 50 per cent of Londoners quickly after the launch. Our advertising and promotional campaigns were well received, with more than six million people seeing our campaign between March and May 2024. Thousands of people engaged with content on our social media channels and visited our partners' and our webpages, with hundreds of people redeeming offers from our partners.

Our customer survey showed that 42 per cent of people who claimed to have taken advantage of off-peak Fridays said this was an additional journey, rather than swapping their usual travelling day to a Friday.

'We have been calling for innovative trials, such as this, to attract more people to the West End. It has the potential to provide a huge boost to our businesses, particularly in the hospitality, retail and cultural sectors'

Ros Morgan
Chief Executive of Heart of London Business Alliance



6million+

customers saw our marketing campaign at least four times between May and March 2023



1.4million

customers reached by the three marketing emails we sent during the trial





Supporting our stakeholders

It was essential to keep our key stakeholders engaged and informed throughout

We had extensive engagement with different stakeholder groups ahead of the launch of the trial. We sent updates, including press releases and briefing emails, to all London MPs and Assembly Members, London Councils, London borough councils, and cabinet members.

We engaged and promoted the campaign to transport groups across London and the South East, and a range of stakeholder groups, including London Business Improvement Districts (BIDs), employers and landowners, passenger and accessibility groups, business and visitor groups.

We held two roundtable discussions sessions, which brought together business groups, BIDs and landowners, and were hosted by our Customer Director. We shared information on how they could promote the trial to their tenants, employees and customers.

We also developed a 'one-stop shop' for businesses to help them promote the trial to their employees, helping them make the most of the savings offered by the trial.

At the outset of the trial, the Talk London online community was asked: 'Will cheaper fares on Fridays change the ways and days you travel around London?' More than 900 Londoners responded to the survey. Of the 178 comments posted during the discussion, the majority were supportive of the trial.

'Experimenting with Friday fares is an innovative step that could help encourage some hybrid workers back into the capital, in turn supporting businesses that rely on footfall'

Muniya Barua
Deputy Chief Executive
at BusinessLDN



Learning the lessons

We have analysed the results of the trial and will use this to inform any future promotions

Supporting our high streets

The trial was designed to help London's high streets by driving footfall on Fridays

Analysis by the Greater London Authority shows that year-on-year, spending was down while transactions were up slightly in the central activities zone between 06:00 and 18:00 on Fridays during the trial. This was mainly driven by low growth in March and April, while May brought slight increases in both spending and transactions relative to 2023.

Overall, weekdays saw similar trends to Fridays in both spending and transactions growth during the trial; specifically, a slight drop in spend and a small increase in transactions. This suggests that the observed growth in transactions was more a result of a general trend of smaller but more frequent purchases on weekdays rather than an impact from the trial.

'Cutting the cost of travel on Fridays is a welcome move for our flagship Destination City programme, which sets out a vision for the Square Mile to become a world-leading leisure destination for UK and global visitors, workers, and residents to enjoy'

Chris Hayward
City of London Corporation
Policy Chairman



2.5%

year-on-year increase in spending on Fridays in May 2024



3.7%

year-on-year increase in transactions made on Fridays in May 2024



1%

year-on-year increase in spending on weekdays in May 2024



2.3%

year-on-year increase in transactions made on weekdays in May 2024



Assessing the results

Ridership data

During the trial, an average of 1.31 million peak-time rail journeys were made on Fridays that were not affected by National Rail strikes and public or school holidays, which is the same level as pre-trial Fridays.

There was a small increase in demand at other times of the day, where no discount applied, which was within the range of seasonal variation. However, there was no noticeable difference in the number of pay as you go journeys made at peak times during the trial compared to pre-trial.

The discount offered was larger both as a percentage and in absolute terms for journeys involving more zones, providing a larger incentive for customers to change their travel patterns. However, no material demand growth was observed irrespective of the size of discount available.

A small number of people aged over 60 took the chance to travel for free before 09:00 on off-peak Fridays. When the trial began, 1.6 per cent of over-60s' journeys were made before 09:00 on Fridays, and this figure rose to 3.1 per cent by the end of the trial. However, this is much lower than in 2019/20, prior to the withdrawal of free weekday travel for people aged over

60 before 09:00 during the pandemic, when on average 18 per cent of over-60s' journeys were made before 09:00 on Fridays.

While there were no discernible changes in our ridership data, the trial was popular with Londoners, businesses and business improvement districts, particularly in areas where hospitality and cultural venues are particularly reliant on trade from local business rather than visitors.

Changes to our fares

Travel is vital to many of our daily activities, enabling us to access work, leisure and education, attend to business, go shopping, see our loved ones and enjoy our leisure time. Londoners build their lives around our comprehensive public transport network and more than 40 per cent of London households do not own a car, so are largely reliant on public transport and active travel.

This trial has shown that a temporary discount to peak fares on a Friday does not result in a significant increase in travel, suggesting that there are factors other than price that influence our customers when deciding on which weekdays to travel.

Scotrail saw similar results when it offered off-peak fares all day. Its interim evaluation found no strong evidence that it is an effective way to encourage people to change travel modes, or that it particularly helps existing customers with their cost-of-living issues.

The relative affordability of our fares means the discount may not have been perceived as significant enough to warrant people changing their flexible working patterns.



52%

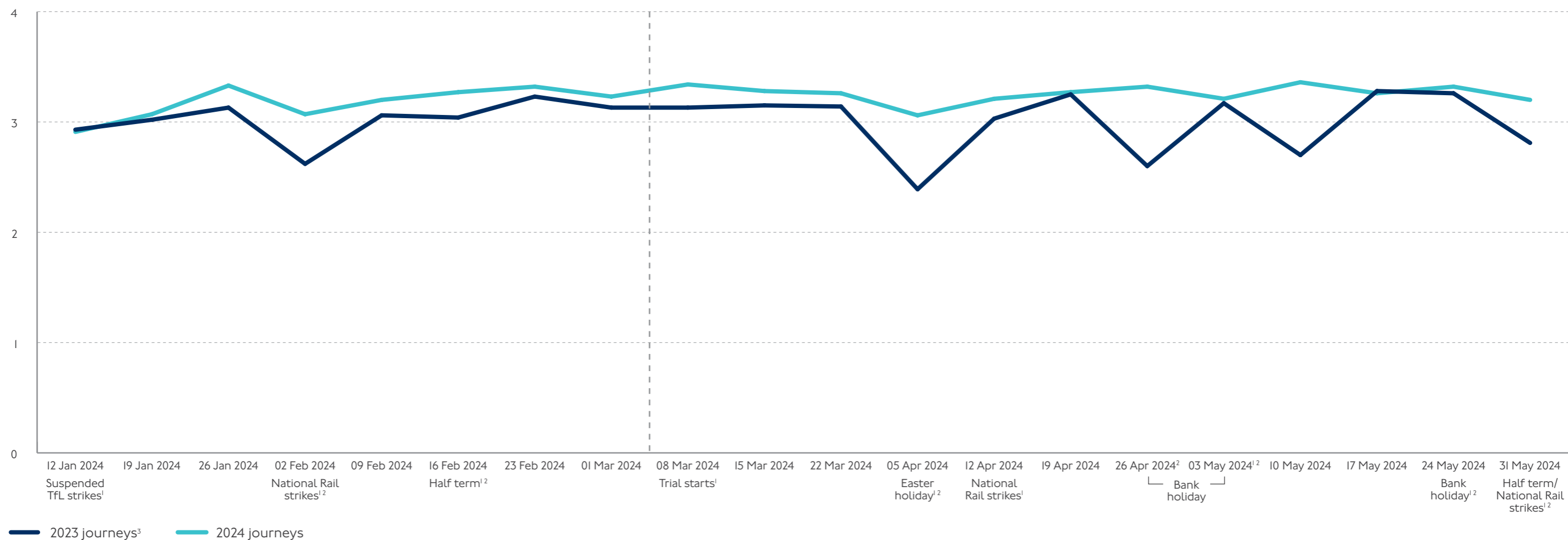
of Londoners were aware of off-peak Fridays, from a sample of 2,775 people



1.31million

rail journeys made on average during peak hours on off-peak Fridays

Friday pay as you go rail journeys Daily total (millions)



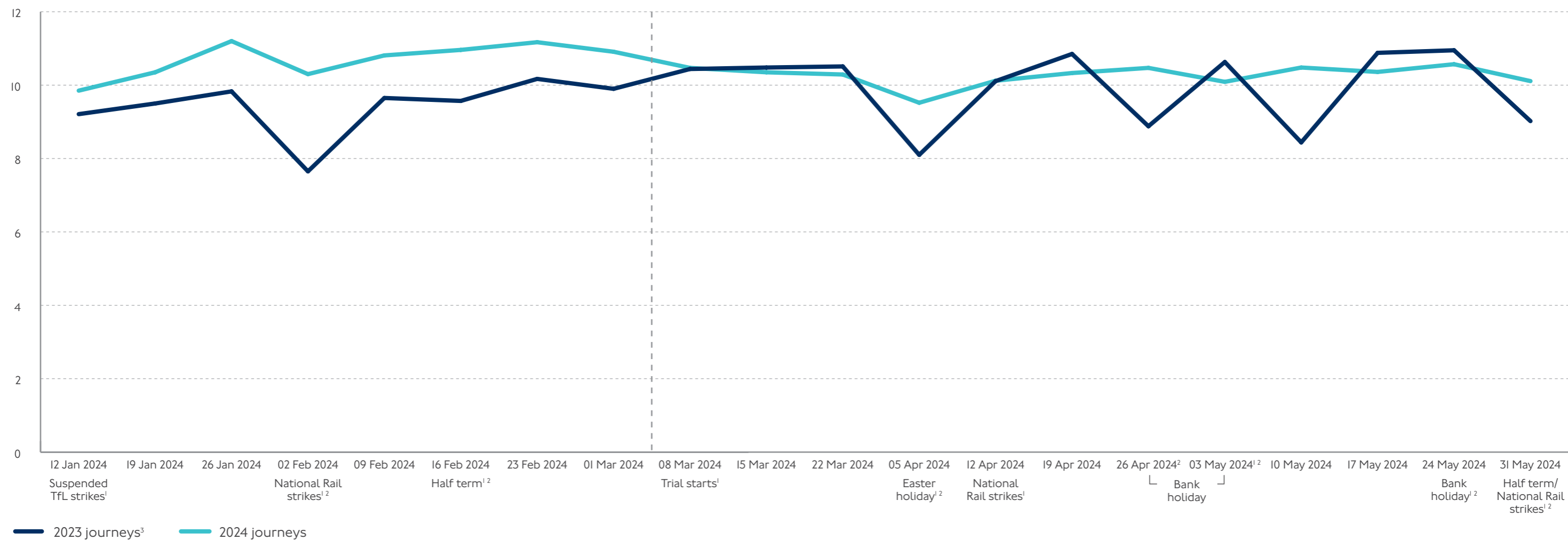
Year-on-year growth (percentage)

Date	12 Jan	19 Jan	26 Jan	02 Feb	09 Feb	16 Feb	23 Feb	01 Mar	08 Mar	15 Mar	22 Mar	05 Apr	12 Apr	19 Apr	26 Apr	03 May	10 May	17 May	24 May	31 May
Growth (%)	-0.8	1.9	6.3	17.4	4.7	7.6	2.8	3.4	6.8	4.2	4.0	27.9	6.0	0.6	27.9	1.3	24.5	-0.5	1.9	14.0

Weeks affected by holidays and National Rail strikes in 2023 saw significant falls in Friday pay as you go rail journeys. Excluding these weeks, average growth was 3.8 per cent year-on-year during the pre-trial period and 3.0 per cent during the trial.

1. Fridays affected by holidays and strikes in 2024
2. Equivalent Fridays affected by holidays and strikes in 2023
3. Dates shown are Fridays in 2024. Data for 2023 journeys is for the equivalent Friday

Friday pay as you go fares paid for rail journeys Daily total (£m)



Year-on-year growth (percentage)

12 Jan	19 Jan	26 Jan	02 Feb	09 Feb	16 Feb	23 Feb	01 Mar	08 Mar	15 Mar	22 Mar	05 Apr	12 Apr	19 Apr	26 Apr	03 May	10 May	17 May	24 May	31 May
7.0	8.9	14.0	34.6	11.9	14.6	9.8	10.3	0.4	-1.2	-2.1	17.6	0.1	-4.8	18.0	-5.1	24.2	-4.8	-3.5	12.1

Excluding weeks affected by holidays and National Rail strikes in 2023, total fares paid for Friday pay as you go rail journeys fell by 2.5 per cent year-on-year during the trial due to the discount offered by charging off-peak fares at peak times, having grown by 11.0 per cent prior to the trial.

1. Fridays affected by holidays and strikes in 2024
2. Equivalent Fridays affected by holidays and strikes in 2023
3. Dates shown are Fridays in 2024. Data for 2023 journeys is for the equivalent Friday



Going forward

We will use insights from the trial to help inform fares policy

This trial is part of a wider approach, to which the Mayor made a commitment in his manifesto, to make fares and ticketing more flexible and innovative. We will use the insight from this trial to inform fares policy going forward. This will be supported by ongoing analysis of customer behaviour, as well as discussions with stakeholders and business groups. We will continue to work with the Mayor to review our fares and ticketing system to ensure it continues to be world-leading and can meet the evolving needs of passengers.

As part of this we are procuring a supplier for our revenue collection services, to replace the current contract that ends in summer 2026. This will require a supplier to operate and maintain our fare collection system, provide the associated revenue collection services and, in partnership with us, develop, enhance and expand these to meet future needs.

In this process, we have asked bidders to provide proposals on how to develop the Oyster system during the new contract term, which could enable us to run more innovative trials or enhancements.

As part of our Equity in Motion plan, we have implemented a concession entitling care leavers to half-price bus and tram travel and are committed to working with stakeholder groups to ensure disadvantaged Londoners can benefit from our wide range of concessionary fares to make travel across the capital more affordable. We also plan to undertake a study to better understand how cost affects the travel of people with protected characteristics, to inform our investment priorities.

As part of our wider work to identify innovative ways to better support our customers, soon they will be able to use the TfL Go app to access their journey

history and fare payments. This innovation will provide more flexibility for customers to view and pay for their travel on the go, all in one place. Customers will be able to view their journey history in the app if they used a contactless payment card or Oyster card for travel. They will also be able to top up and add Travelcards to their Oyster cards directly in the app.

This trial has shown that a temporary discount to peak fares on a Friday does not result in a significant increase in travel. However, this trial has informed our understanding of how changes to overall fare levels can impact ridership.

Following this trial, TfL will continue to develop ideas to work innovatively with businesses and third parties to promote travel on public transport, including offering incentives where possible. This will be supported by ongoing analysis to better understand post-pandemic travel patterns. This includes looking at suburban high streets and the benefits of people staying local; and understanding what other reasons impact decisions around discretionary travel since the pandemic, such as the price and location of activities for various groups of Londoners. This work will support the implementation of wider transport improvements across the capital, such as Superloop 2 in outer London.

‘It is good that Transport for London took the initiative to test the idea of off-peak Fridays by doing it, rather than just asking people about it. The result is interesting because it suggests that the reduced numbers are about behaviour and lifestyle rather than money – people realise they can work more flexibly and not travelling into the centre of London, for example, on a Friday is one element of that’

Prof Nick Tyler
Director, Centre for Transport Studies, University College London



About us

Part of the Greater London Authority family led by Mayor of London Sadiq Khan, we are the integrated transport authority responsible for delivering the Mayor's aims for transport. We have a key role in shaping what life is like in London, helping to realise the Mayor's vision for a 'City for All Londoners' and helping to create a safer, fairer, greener, healthier and more prosperous city. The Mayor's Transport Strategy sets a target for 80 per cent of all journeys to be made by walking, cycling or using public transport by 2041. To make this a reality, we prioritise safety, sustainability, health and the quality of people's experience in everything we do.

We run most of London's public transport services, including the London Underground, London Buses, the DLR, London Overground, Elizabeth line, London Trams, London River Services, London Dial-a-Ride, Victoria Coach Station, Santander Cycles and the IFS Cloud Cable Car.

We manage the city's red route strategic roads and are responsible for the maintenance, management and operation of more than 6,000 sets of traffic lights across the capital. The London boroughs are responsible for all the remaining roads within their boundaries. The experience, reliability and accessibility of our services are fundamental to Londoners' quality of life. Safety remains our number one priority and we continue to work tirelessly to improve safety across the network for both colleagues and customers.

Our vision is to be a strong, green heartbeat for London. We are investing in green infrastructure, improving walking and cycling, reducing carbon emissions, and making the city's air cleaner. The Ultra Low Emission Zone, and fleets of increasingly environmentally friendly and zero-emission buses, are helping to tackle London's toxic air. We are also improving public transport options, particularly in outer London, to ensure that more people can choose public transport or active travel over using their vehicles.

That is why we are introducing the outer London Superloop bus network, providing express bus routes circling the entire capital, connecting outer London town centres, railway stations, hospitals and transport hubs.

We have constructed many of London's most significant infrastructure projects in recent years, using transport to unlock economic growth and improve connectivity. This includes major projects like the extension of the Northern line to Battersea Power Station and Nine Elms in south London, as well as the completion of the London Overground extension to Barking Riverside and the Bank station upgrade.

The Elizabeth line, which opened in 2022, has quickly become one of the country's most popular railways, adding 10 per cent to central London's rail capacity and supporting new jobs, homes and economic growth. We also use our own land to provide thousands of new affordable

homes and our own supply chain creates tens of thousands of jobs and apprenticeships across the country.

We are committed to being an employer that is fully representative of the community we serve, where everyone can realise their potential. Our aim is to be a fully inclusive employer, valuing and celebrating the diversity of our workforce to improve services for all Londoners.

We are constantly working to improve the city for everyone. This means using information, data and technology to make services intuitive and easy to use and doing all we can to make streets and transport services accessible and safe to all. We reinvest every penny of our income to continually improve transport networks for the people who use them every day. None of this would be possible without the support of boroughs, communities and other partners who we work with to improve our services. By working together, we are creating brighter journeys and a better city.

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