



# Rail Fares Index (January 2018)

Publication date: 19 April 2018

Next Publication date: April 2019

## Background

This annual release contains information on changes in rail fares. This covers:

- Average change in price of regulated/unregulated fares by sector (1995 to 2018) - Table 1.81
- Average change in price of fares by ticket type and sector (2004 to 2018) - Table 1.8

**Coverage:** Great Britain

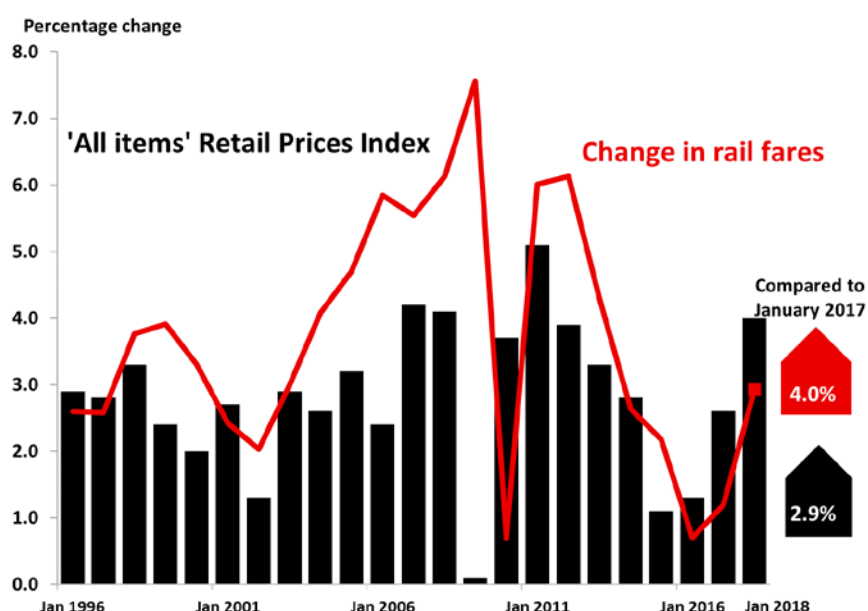
**Latest Year:** January 2018  
(change since January 2017)

### Sources:

- LENNON ticketing and revenue database
- Rail Delivery Group
- Office for National Statistics

**Rail Fares** in Great Britain increased by 2.9% in January 2018 compared with a 4.0% rise in the Retail Prices Index (RPI). This is the fourth time in the last five years that fares have risen below inflation.

## Percentage change in rail fares and 'all items' RPI, January 2018



**The average change in the price of regulated fares** between January 2017 and January 2018 was 3.3%. This is below the cap set by government of 3.6% based on the July 2017 increase in RPI as detailed in the [ONS inflation and price indices](#).

**The average change in the price for each ticket type** exceeded 3% in January 2018, with the exception of Advance fares, which increased by 1.1%. Off-Peak and Super Off-Peak fares showed the largest increases of 3.7% and 3.6% respectively.

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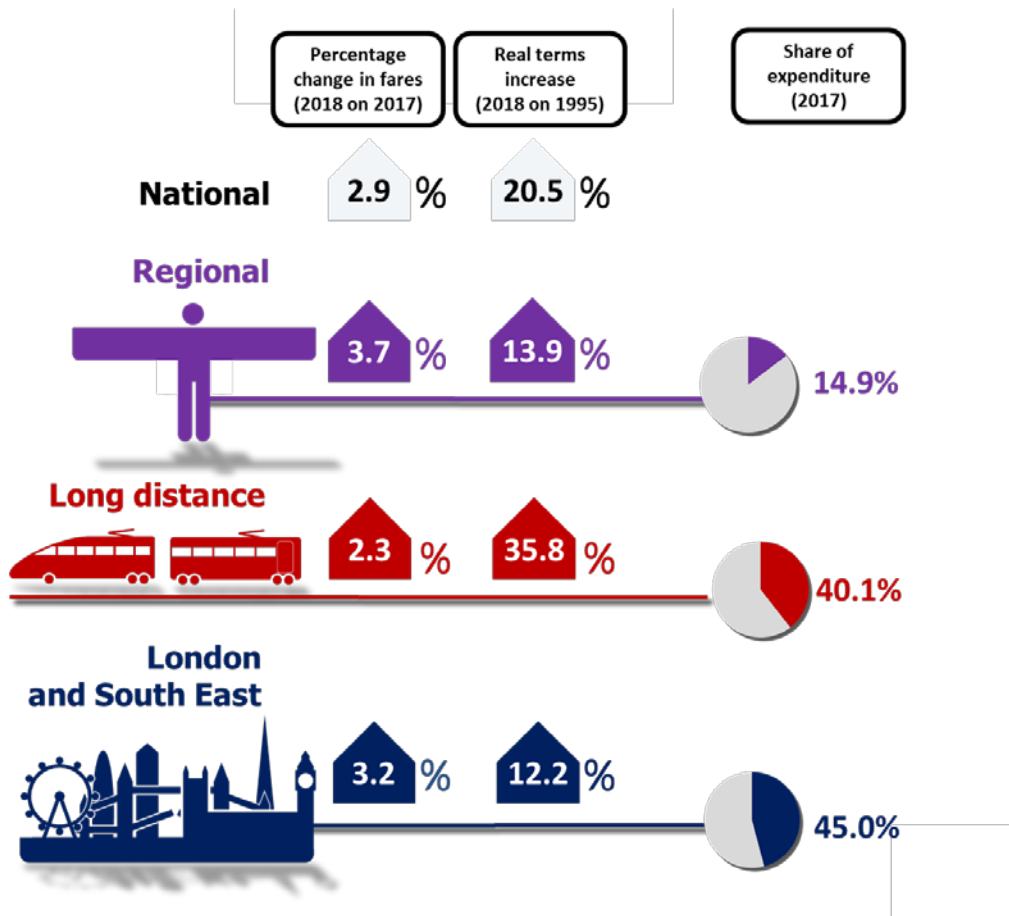
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# 1. Rail Fares Index

Figure 1.01: Revenue share and percentage change in rail fares, National and sector



Regional sector includes Scotland.

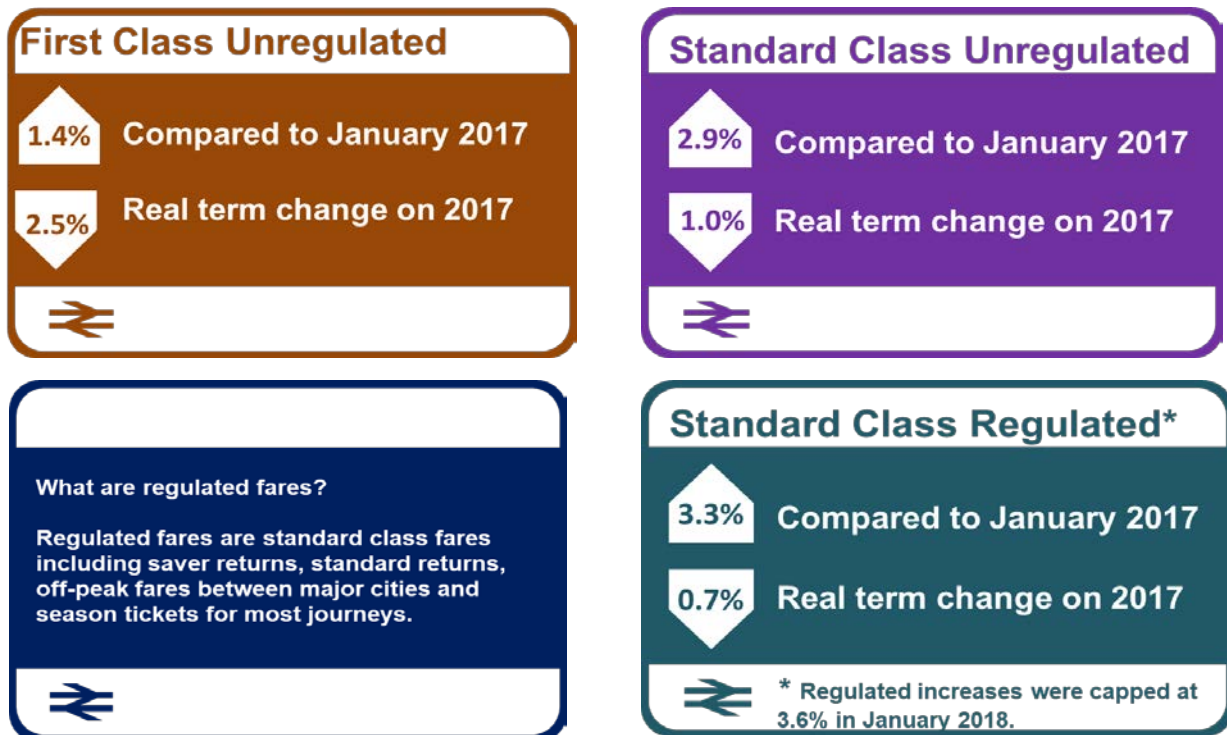
The Long Distance sector recorded the lowest increase of 2.3%, driven by a 0.3% increase in Advance fares. Advance fares account for over a third of revenue within the sector, so this helped to offset increases of between 2.9% and 4.2% for all other ticket types in the sector.

The market share of revenue in the London and South East sector fell by 0.9 percentage points (pp) compared to 2016. The share of revenue in the Long Distance sector rose to over 40% in 2017, up 0.7pp whilst the Regional sector saw a smaller increase of 0.2pp.

The Long Distance sector has the largest real terms change in rail fares since the series began in 1995. This is primarily due to the volume of unregulated, Advance fares within the sector, which are not capped by government.

## 2. Average change in regulated/unregulated fares

Figure 2.01: Nominal and real terms change in regulated and unregulated fares, all operators, January 2018



The average change in regulated rail fares between January 2017 and January 2018 was 3.3%. This represented a decrease in real terms of 0.7% as over the same time period the RPI increased by 4.0%. The average change in regulated fares is set by the Government to be capped at the July RPI, which was 3.6% in July 2017.

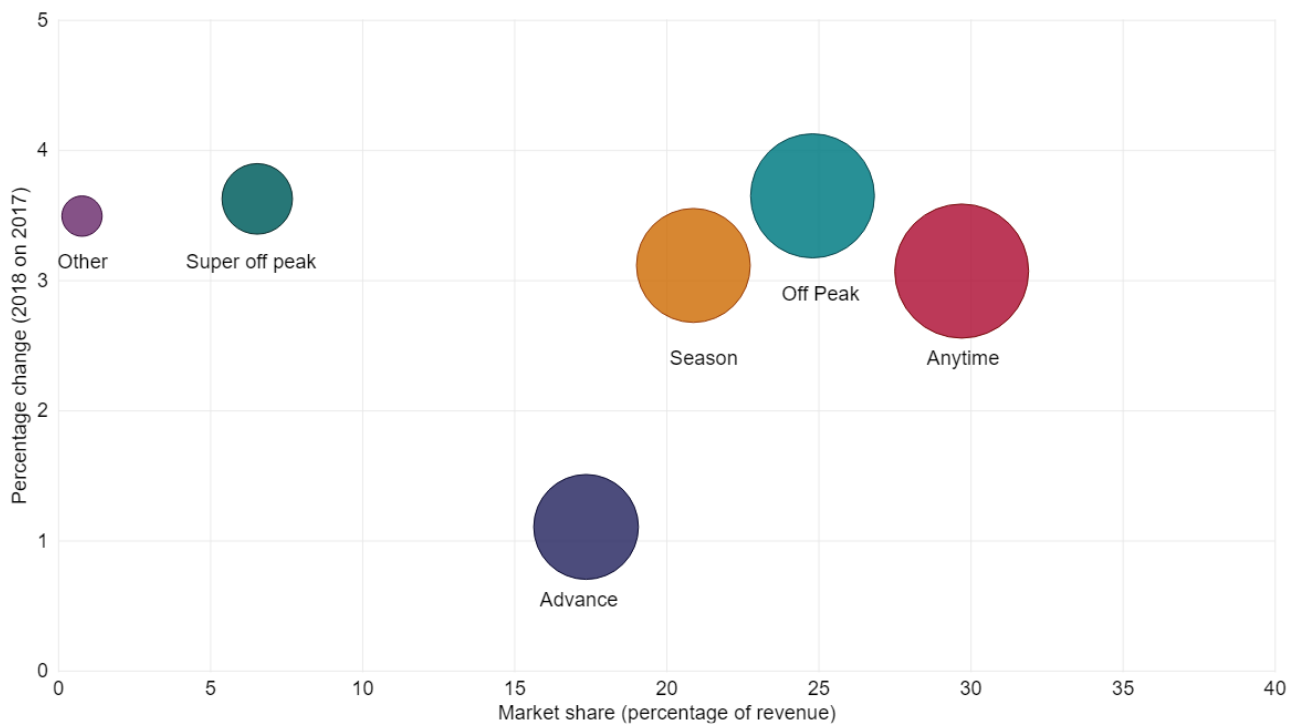
The 3.3% increase in regulated fares is primarily driven by the London and South East sector, which accounts for just over two thirds of all regulated fare revenue. Regulated fares within that sector increased by an average of 3.1% compared to January 2017.

Almost eight in every ten first class tickets are sold within the Long Distance sector. Therefore, despite first class fares increasing by more than 4% in both the Regional and London and South East sectors, the increase of 0.7% in the Long Distance sector ensured the overall increase was limited to 1.4%.

Standard class unregulated fares across the three sectors saw an increase of 2.9% compared to January 2017. The Regional sector recorded the highest increase of 3.9% followed by the London and South East sector with an increase of 3.3% over January 2017. These were offset by a lower increase of 2.3% in the Long Distance sector.

### 3. Average change in price by ticket type

**Figure 3.01: Revenue market share and percentage change in rail fares compared to 2017, ticket type**



The average change in fares across all ticket types increased by 2.9% between January 2017 and January 2018. All ticket types with the exception of Advance fares recorded an increase in excess of 3%.

The largest increase in January 2018 was for Off-Peak tickets. Almost a quarter of revenue comes from Off-Peak tickets and they increased by 3.7% compared to 2017.

Anytime and Season tickets together account for almost half of all ticket revenue and they both increased by 3.1% compared to January 2017.

Advance tickets recorded their first annual increase since January 2015, going up by 1.1% compared to January 2017, whilst also increasing their market share from 16.2% to 17.3%. Over the same period, market share for Season tickets fell from 22.6% to 20.9%.

# Annex 1 – List of pre-created reports available on the ORR Data Portal

All data tables can be accessed on the [ORR data portal](#) free of charge and can be downloaded in ods format. We can also provide data in csv on request.

All tables associated with this release can be found under Data Tables on the [Rail fares page](#).

## Index showing average change in price of rail fares

- Index showing average change in price of rail fares by ticket type – Table 1.8
- Index showing average change in price of rail fares by regulated and unregulated tickets – Table 1.81

**Revisions:** There have been no revisions made to the previously published tables associated with this statistical release. Further details on historic revisions to the data set can be found on the [Revisions log](#).

# Annex 2

## Statistical Releases

This publication is part of the ORR's [National Statistics](#) accredited statistical releases which consist of annual and quarterly themed releases:

### Annual:

- Rail Finance;
- Rail Fares Index;
- Rail Safety Statistics;
- Rail Infrastructure, Assets and Environmental;
- Regional Rail Usage;

### Quarterly:

- Passenger and Freight Rail Performance;
- Freight Rail Usage;
- Passenger Rail Usage;
- Passenger Rail Service Complaints.

A full list of publication dates for the next twelve months can be found in the [ORR Publication release schedule](#) on the ORR data portal.

For more information on data collection and the methodology used to calculate the statistics in this release please see the accompanying [Quality Report](#).

# National Statistics

The United Kingdom Statistics Authority designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value.

All official statistics should comply with all aspects of the Code of Practice for Official Statistics. They are awarded National Statistics status following an assessment by the Authority's regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

It is ORR's responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Authority promptly. National Statistics status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.

For more details please contact the Statistics Head of Profession Abby Sneade on 020 7282 3978 or contact [rail.stats@orr.gsi.gov.uk](mailto:rail.stats@orr.gsi.gov.uk).

The Department for Transport (DfT) also publishes a range of rail statistics which can be found at [DfT Rail Statistics](#).



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