



Rail Fares Index (January 2019)

Publication date: 9 May 2019

Next Publication date: April 2020

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 2019) - Table 1.81
- Average change in price of fares by ticket type and sector (2004 to 2019) - Table 1.8

Coverage: Great Britain

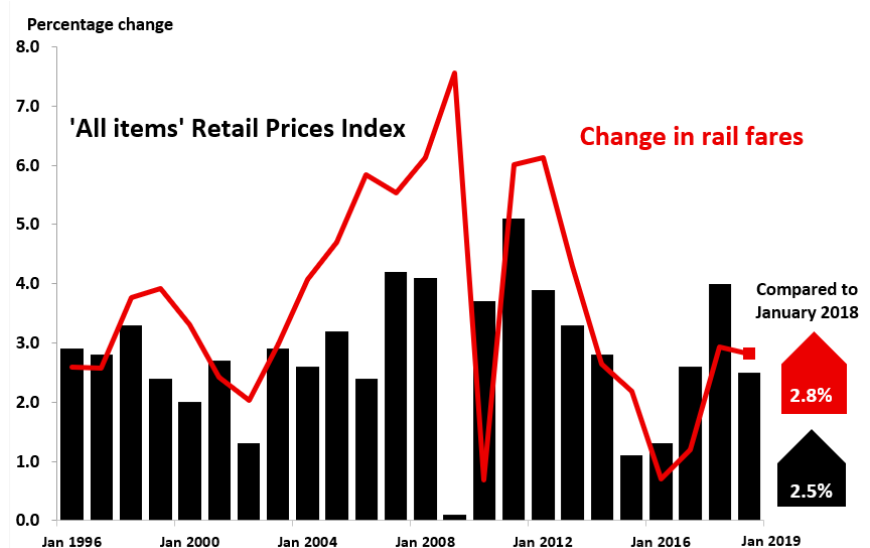
Latest Year: January 2019
(change since January 2018)

Sources:

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

Rail Fares in Great Britain increased by 2.8% in January 2019 compared with a 2.5% rise in the January 2019 Retail Prices Index (RPI). This is the first time in the last four years that fares have risen by more than the January RPI inflation rate.

Percentage change in rail fares and 'all items' RPI, January 2019



The average change in the price of regulated fares between January 2018 and January 2019 was 2.8%. This is below the cap set by government of 3.2% based on the July 2018 increase in RPI as detailed in the [ONS inflation and price indices](#).

The average change in price for each ticket type was below 3% in January 2019, with Super Off-Peak and Off-Peak fares showing the largest increases of 3.0% and 2.8% respectively.

Responsible Statistician: Peter Moran

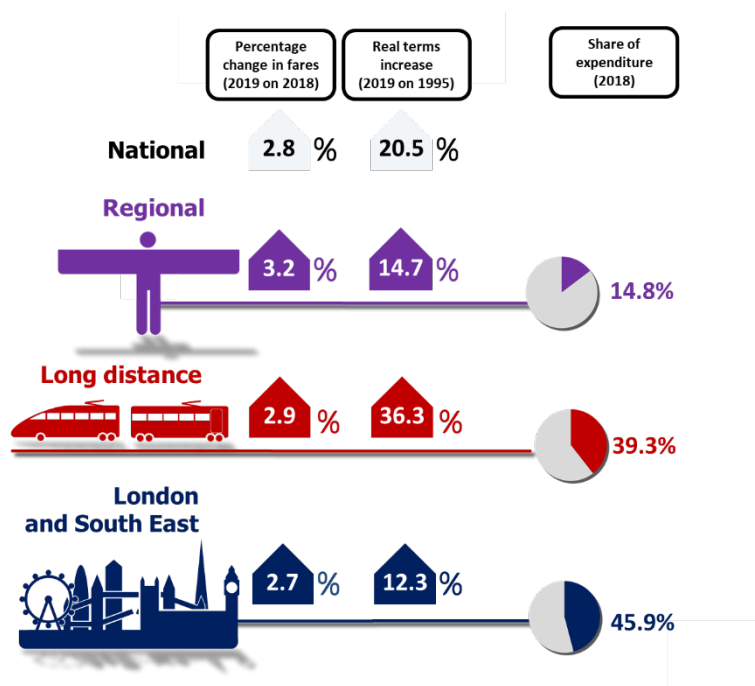
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1. Rail Fares Index

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



Regional sector includes Scotland.

The London and South East sector, which holds the highest market share of revenue among the three sectors, recorded the lowest average price increase, of 2.6%. The main drivers within this sector, Anytime, Season and Off Peak ticket types all increased by less than 3%.

The Regional sector recorded the highest increase of 3.2%, driven by increases in the Anytime and Off Peak ticket types, which combined account for almost two-thirds of revenue within the sector.

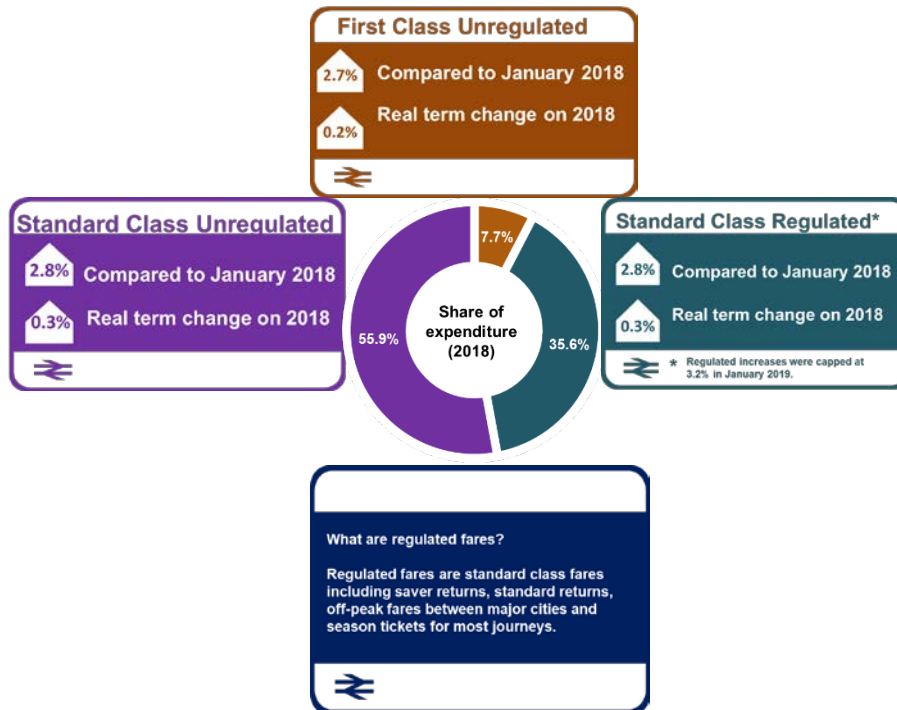
The Long Distance sector saw the average price increase by 2.9% compared to last year with the main driver in this sector, Advance tickets, increasing by 2.8%.

Market share of revenue in the London and South East sector (45.9%) increased by 0.9 percentage points (pp) compared to 2017. This reflects the stronger growth within the sector for passenger journeys over the same period compared with the Long Distance and Regional sectors.

The Long Distance sector has had the largest real terms change in rail fares since the series began in 1995. This is largely due to unregulated fares having a greater share of the market in this sector, and unregulated fares are not bound by any inflationary cap.

2. Average change in regulated/unregulated fares

Figure 2.01: Nominal and real terms change in regulated and unregulated fares, all operators, January 2019



The average change in regulated rail fares between January 2018 and January 2019 was 2.8%. This represented an increase in real terms of 0.3% as, over the same time period, the RPI increased by 2.5%.

The average change in regulated fares is set by the Government and is capped at the July RPI, which was 3.2% in July 2018.

The 2.8% 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 2.7% compared to January 2018.

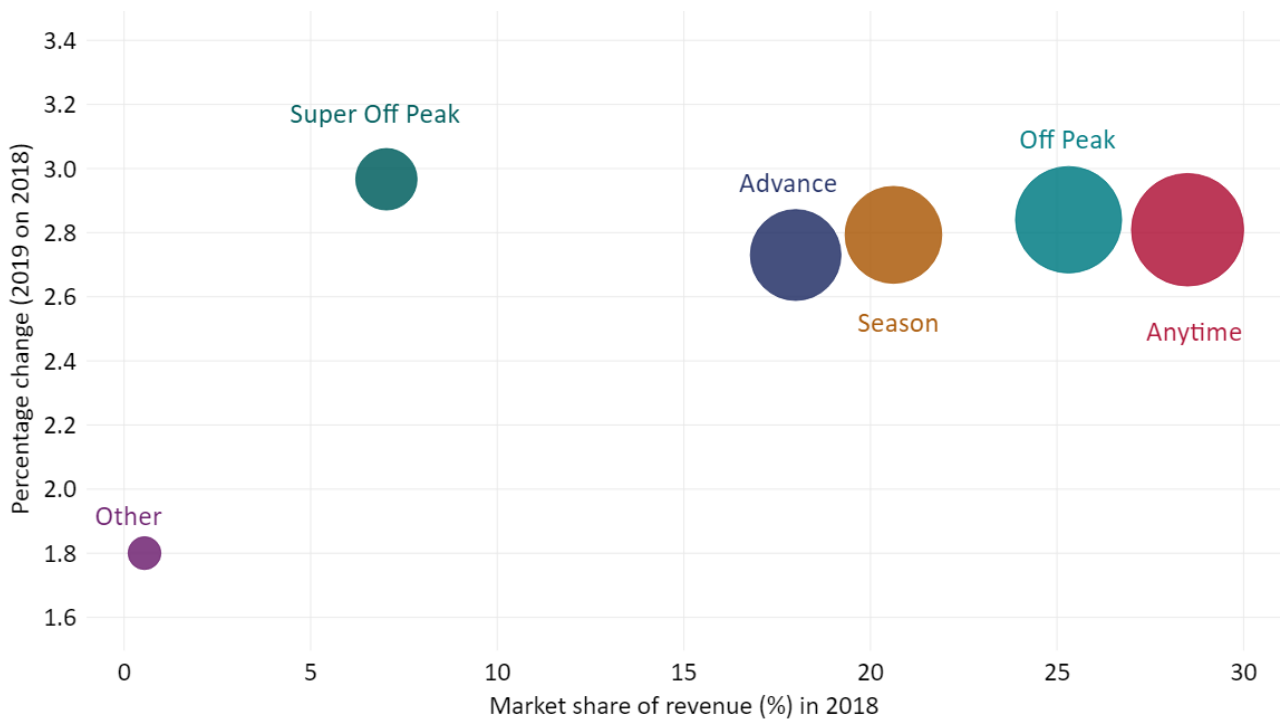
The unregulated first class fares increased by 2.7% between January 2018 and 2019. Almost 80% of first class tickets were sold in the Long Distance sector so the increase of 2.6% in that sector offset the higher increases seen in the Regional (4.3%) and London and South East sectors (2.9%).

Standard class unregulated fares saw an increase of 2.8% compared to January 2018. The Regional sector recorded the highest increase of 3.3% with the Long Distance and London and South East sectors increasing by 2.8% and 2.5% respectively.

In real terms since January 1995, the average fare increases on first class tickets have been over three times that of standard class tickets. This is mainly because the first class tickets fall into the unregulated category which are not capped by government.

3. Average change in price by ticket type

Figure 3.01: Revenue market share and percentage change in rail fares compared to 2018, ticket type



The average change in fares across all ticket types increased by 2.8% between January 2018 and January 2019 with Super Off Peak tickets recording an increase of 3.0%.

Anytime, Off Peak and Season tickets, the top three earners among all ticket types, all recorded a 2.8% increase in fares compared to January 2018.

Advance tickets recorded an increase of 2.7% compared to January 2018, with their market share increasing to 18.0% from 17.3% last year. Over the same period, market share for Season tickets fell from 20.9% to 20.6%, the third year in succession that season ticket market share has fallen.

Annex 1 – List of tables 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](#).

Methodology: Please see the [Rail fares index methodology and quality report](#) for more information on the methodology used to calculate the statistics in this release.

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;
- *Estimates of Station Usage (not National Statistics)*

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.

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 Lyndsey Melbourne on 020 7282 3978 or contact rail.stats@orr.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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