# Rail fares index 2022

28 June 2022

As in 2021, new rail fares were introduced on 1 March 2022 rather than the usual January change to rail fares. This release compares the change in prices between 2021 and 2022, and earlier years. This release does not capture the effect of the Great British Rail Sale, where discounted tickets were sold between 19 April 2022 to 2 May 2022.

Rail fares increased by 4.8% in March 2022 compared with a 9.0% increase in the Retail Prices Index (RPI) over the same period.

The average change in regulated rail fares from March 2022 was 3.7%. This was slightly below the 3.8% cap set by government.

Long Distance sector fares had the largest increase of 6.1%, with the London and South East and Regional sectors increasing by 4.1% and 4.0% respectively. London and South East sector retains the largest revenue share with 45.2%, down from 54.0% last year

Figure 1: Revenue share and annual change in rail fares by sector, Great Britain, annual data, 2022
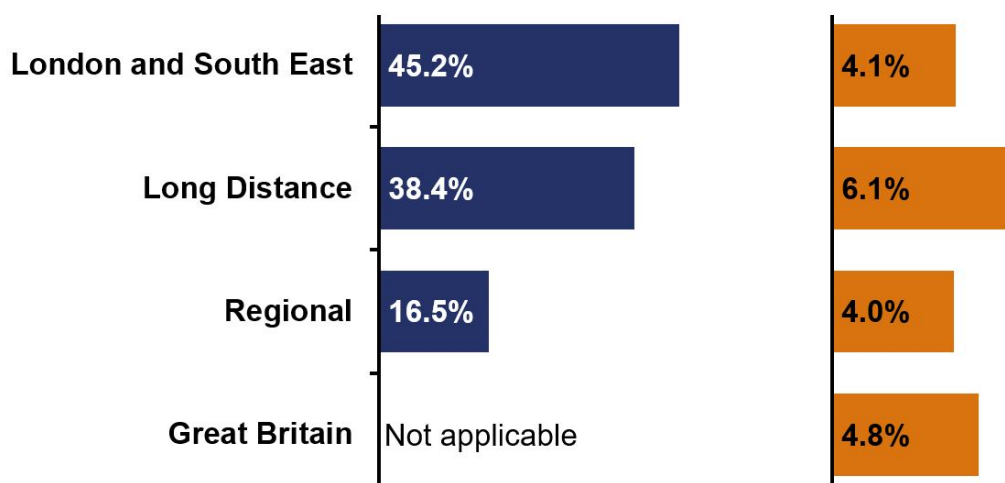
Revenue share from season tickets (tickets valid for one week or longer) fell to 8.9% in the year to 1 March 2022.

All data tables and quality and methodology report associated with this release are published on the rail fares page of the data portal. Key definitions are in annex 1.

1. Average change in regulated and unregulated fares

Regulated fares are standard class fares including saver returns, standard returns, off-peak fares between major cities and season tickets for most journeys. Price changes for regulated fares are capped by government based on the annual change in the RPI in July of each year.

The average change in regulated rail fares from March 2022 was 3.7%. This was slightly below the 3.8% cap set by government, based on the July 2021 RPI increase.

Figure 1.1: Regulated fare cap of 3.8% in 2022 was the highest since 2013 (4.2%)

Annual regulated fares cap set by government, Great Britain, annual data, 1996 to 2022
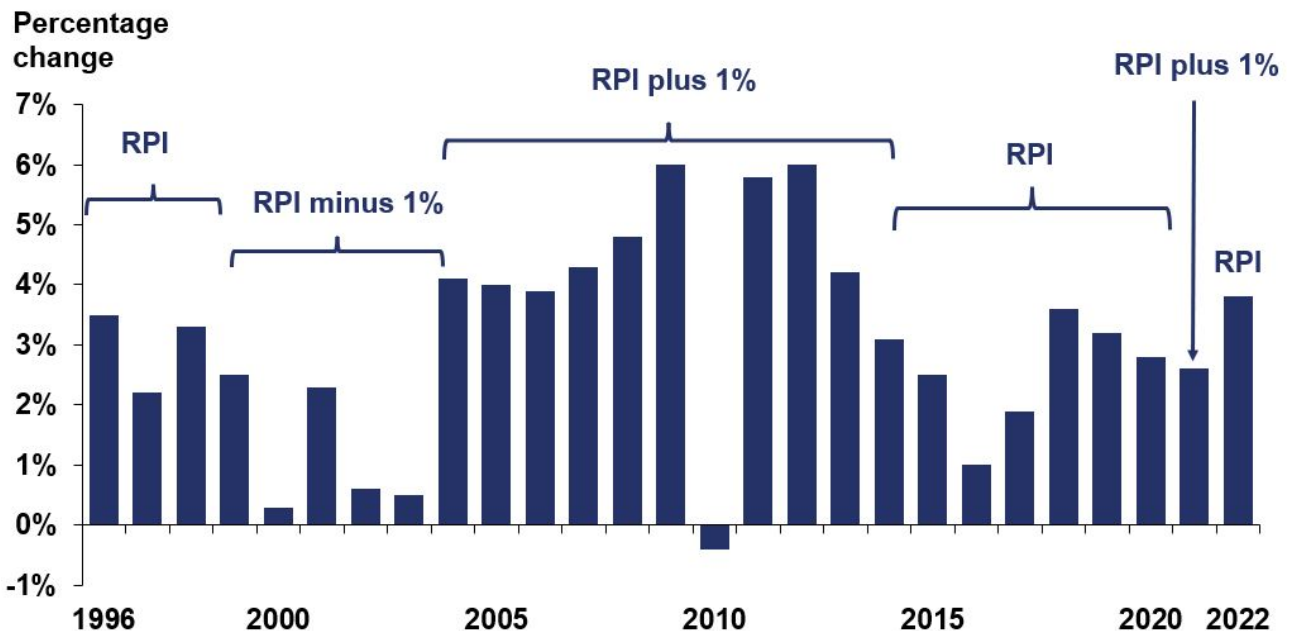
Unregulated fares include first class, advance purchase and saver tickets. Train operators are free to determine these fares, although these can also be capped in certain circumstances.

Unregulated first class fares increased by 11.1% compared with March 2021 fares. This was driven by a 12.5% increase in the Long Distance sector, which accounts for over 80% of first class fare revenue.

Unregulated standard class fares saw an increase of 4.8% compared with 2021. Fares increased across all sectors; 5.5% in the Long Distance sector, 4.4% in London and South East and 4.1% in the Regional sector.

2. Average change in price by ticket type

Figure 2.1: Season tickets had the lowest share of revenue of any ticket type at 8.9%

Revenue share and annual change in rail fares by ticket type, Great Britain, annual data, 2022
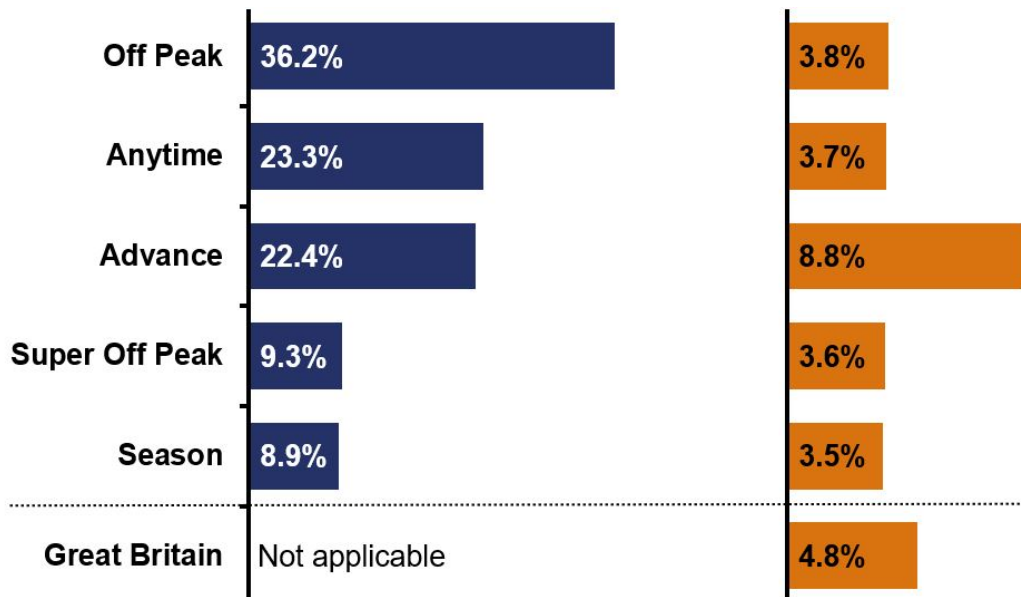
The average fare increase across Great Britain from 1 March 2022 was 4.8% compared with 2021.

This increase was driven by an 8.8% rise in the cost of Advance fares. Revenue market share for Advance tickets recovered to 22.4% in the year to 1 March 2022; up from 11.8% in the previous year. Advance ticket sales were affected by the pandemic due to uncertainty over long-term travel plans. However, an easing of restrictions which gave passengers more flexibility to amend or change their tickets may have increased confidence.

Off Peak and Anytime tickets accounted for almost 60% of revenue in the year preceding the fare increase, and prices on those tickets increased by 3.8% and 3.7% respectively.

Season ticket fares increased by 3.5% but their market share of revenue fell by almost a half, from 17.7% in the previous year to 8.9% in the year to 1 March 2022. Uncertainty over travelling during the pandemic and the tendency to work at home has reduced demand for longer-term season tickets, leading to the introduction of more flexible season tickets.

3. Annexes

Annex 1: Definitions

Coverage: The data presented in this release are for all **mainline operators** in Great Britain. The data do **not** include London Underground, light rail, heritage and charter services. Each mainline operator is assigned to one sector:

- **London and South East:** c2c, Chiltern, Govia Thameslink Railway, Greater Anglia, London Overground, Southeastern, South Western Railway, TfL Rail.

- **Long distance:** Avanti West Coast, Cross Country, East Midlands Railway, Hull Trains, Grand Central, Great Western Railway, London North Eastern Railway.

- **Regional:** Caledonian Sleeper, Merseyrail, Northern Trains, Scotrail, TfW Rail, Transpennine Express, West Midlands Trains.

These sectors differ from those used in our passenger rail usage statistics where operators can cover more than one sector.

The ticket types are broken down into the following categories:

- **Anytime:** fully flexible tickets that can be used on most trains and at most times. These are usually more expensive.

- **Advance:** single, one-way tickets for a specific train. These are usually cheaper than other ticket types.

- **Off Peak:** cheaper than anytime fares but cannot be used at busy times of the day.

- **Super Off Peak:** cheaper than off-peak fares but subject to similar restrictions (previously known as Super Saver tickets).

- **Seasons:** allows unlimited travel between two locations for a specified period (from a week up to a year).

- **Other:** includes promotional fares, rover tickets, group tickets and package tickets.

Annex 2: Quality and methodology

Data sources

The data contained within this release are primarily sourced from the rail industry's Latest Earnings Nationally Networked Over Night (LENNON) ticketing and revenue system.

This is supplemented by data from Rail Delivery Group (RDG) and the Office for National Statistics (ONS).

- **LENNON** provides revenue data for each origin-destination flow in Great Britain. This dataset uses the post-allocation dataset within LENNON that distributes passenger revenue to train operators who operate on all, or part, of the origin-destination flow. The revenue data is used to determine the weights that will be applied to calculating the average price change and are based on total revenue in the twelve months prior to the annual rail fare change. As the annual fare change occurred on 1 March 2022, this year's revenue weights cover March 2021 to February 2022 inclusive.

- **Rail Delivery Group** provide a [fares data feed](#) containing the price for every ticket (up to seven-day season tickets) sold through the LENNON system. Prices for season tickets of longer duration (e.g. monthly or annual) are calculated by taking the weekly season ticket price and aggregating those based on pre-determined season ticket factors. These prices are used to calculate the price change between the two reference periods.

- **Office for National Statistics** 'All Items' RPI data is used to compare the average change in rail fares with the average change in other goods and services. Whilst the RPI is no longer the headline measure of inflation, it is used as a comparator due to its relationship with rail fares. The annual change in regulated fares continues to be based on the 12-month change in the July 'All Items' RPI that precedes the annual fare change. We also use the March 2022 'All Items' RPI in our data tables to compare how the overall change in rail fares compares with the price change in other goods and services over the same period.

Methodology

Revenue from 'Other' ticket sales have been removed from this year's calculations. They have been marked as not available within our published data tables. To construct the index, identical products must be identified in March 2021 and March 2022. The small number of products within this category combined with the low revenue associated with them resulted in no price matches in some sectors.

Revisions

There have been no revisions to historic data in this release. Details of previous revisions can be found in the Revisions log.

Further information on data sources, quality and the methodology used to calculate the data within this release can be found in the Rail fares index quality and methodology report.

How these statistics can and cannot be used

- Comparing average price changes by sector, ticket type and regulated fare status for mainline train operators

- Monitoring how rail fares have changed in comparison with the 'All Items' Retail Prices Index (RPI) measure of inflation

- Comparing market share of revenue data by sector, ticket type and regulated fare status for the twelve months leading up to the new fares being implemented

- Identifying the cost of fares for individual train operators and flows between specific origin and destination station (refer to the National Rail Enquiries website)

- Direct comparisons between market share of revenue data within this release and those in our passenger rail usage statistics. Sector definitions and the time periods used to calculate revenue market share differ between the two releases

Annex 3: List of data tables associated with this release and other related statistics

Data tables

All data tables can be accessed on the data portal free of charge in OpenDocument Spreadsheet (.ods) format. We can also provide data in csv format on request.

All tables associated with this release can be found under the Data tables heading at the bottom of the rail fares page.

Rail fares

● Average change in fares by regulated and unregulated tickets – Table 7180
● Average change in fares by ticket type – Table 7182

Other related data

We publish two further finance-related statistical releases:

- Rail industry finance (annually) – includes the income, expenditure and government funding of the UK rail industry
- Passenger rail usage (quarterly) - includes revenue statistics from the LENNON ticketing system

Further information on rail finance is available in Network Rail's regulatory financial statements.

Railway finance data are also part of the HM Treasury's country and regional analysis.

Annex 4: ORR's statistical publications

Statistical Releases

This publication is part of ORR's [National Statistics](#) accredited releases, which consist of seven annual publications: **Estimates of station usage; Rail industry finance (UK); Rail fares index; Rail safety statistics; Rail infrastructure and assets; Rail emissions; Regional rail usage**; and four quarterly publications: **Passenger rail performance; Freight rail usage and performance; Passenger rail usage; Passenger rail service complaints.**

In addition, ORR also publishes a number of Official Statistics, which consist of three annual publications: **Train operating company key statistics; Rail statistics compendium; Occupational health**; and four quarterly publications: **Signals passed at danger (SPADS); Delay compensation claims; Disabled Persons Railcards (DPRC); Passenger assistance.**

All the above publications are available on the [data portal](#) along with a list of [publication dates](#) for the next 12 months.

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**.

The majority of our [statistical releases were assessed in 2012](#) and hold National Statistics status. Since this assessment we have improved the content, presentation and quality of our statistical releases. In addition, in July 2019 we launched our new data portal. Therefore, in late 2019 we worked with the [Office for Statistics Regulation](#) (OSR) to conduct a compliance check to ensure we are still meeting the standards of the Code. On 4 November 2019, [OSR published a letter](#) confirming that ORR's statistics should continue to be designated as National Statistics. OSR found many positive aspects in the way that we produce and present our statistics and welcomed the range of improvements made since the statistics were last assessed. [Estimates of Station Usage statistics were assessed in 2020](#).

For more information on how we adhere to the Code please see our [compliance statements](#). For more details or to provide feedback, please contact the Statistics Head of Profession (Lyndsey Melbourne) at rail.stats@orr.gov.uk.