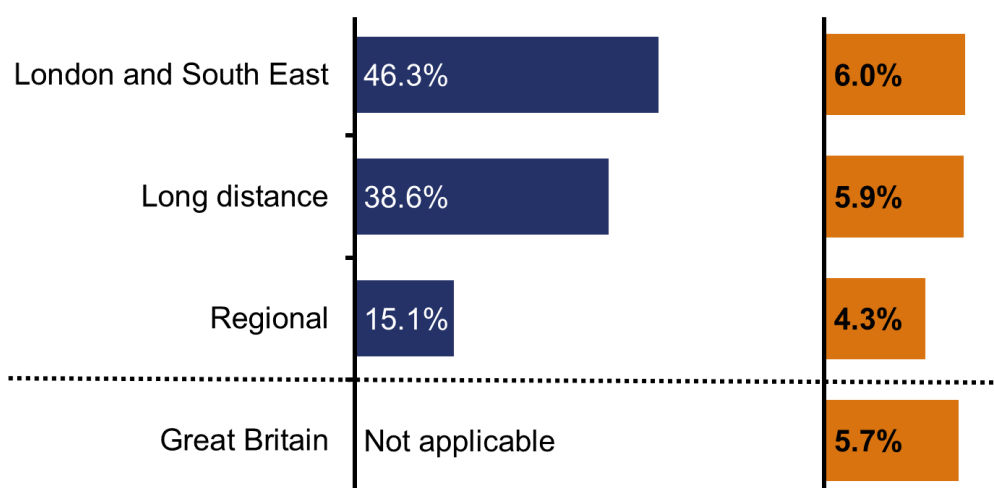# Rail fares index 2023

27 July 2023

New rail fares were introduced across England and Wales from 5 March 2023. This release compares the change in prices across Great Britain between 2022 and 2023, and earlier years. Fares data was collected in April so the effect of the increase in Scotrail fares, which came into effect from 3 July 2023, is not captured within this release.

Rail fares increased by 5.7% in March 2023 compared with a 13.5% increase in the Retail Prices Index (RPI) over the same period.

The average change in regulated fares from March 2023 was 5.6%. The change in regulated fares is usually associated with the July RPI. However, due to the high levels of inflation, the 2023 cap for England and Wales was instead linked to average earnings growth in July 2022.

London and South East fares had the largest increase of 6.0%, closely followed by Long distance fares (5.9%). Prices in the Regional sector increased by 4.3% with the unchanged Scotrail fares offsetting increases elsewhere within the sector.

Figure 1: Revenue share (March 2022 to February 2023) and annual change in rail fares by sector, Great Britain, annual data, March 2023

Sector	Revenue share	Annual change
London and South East	46.3%	6.0%
Long distance	38.6%	5.9%
Regional	15.1%	4.3%
Great Britain	Not applicable	5.7%

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.

The average change in regulated fares from March 2023 was 5.6%. This was below the [5.9% cap set by government](#).

Figure 1.1: Regulated fare cap of 5.9% in 2023 was the highest since 2012 (6.0%)

Annual regulated fares cap set by government, England and Wales, annual data, 1996 to 2023
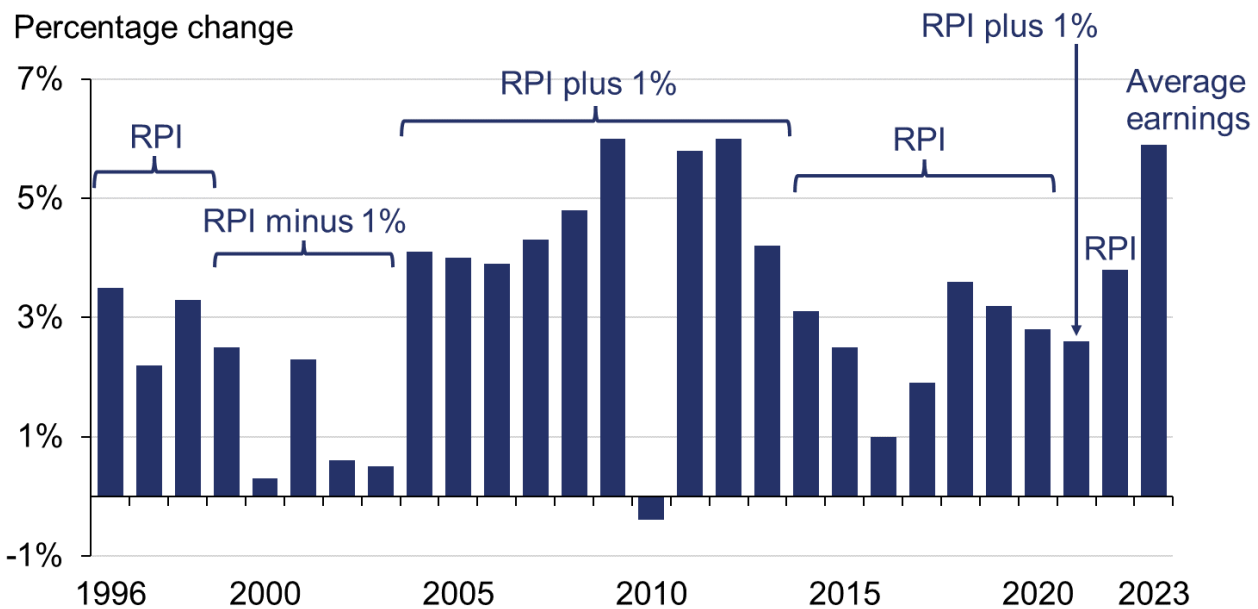
Unregulated fares include first class, advance purchase and saver tickets. Train operators are free to determine these fares, although these can also be capped in certain circumstances.

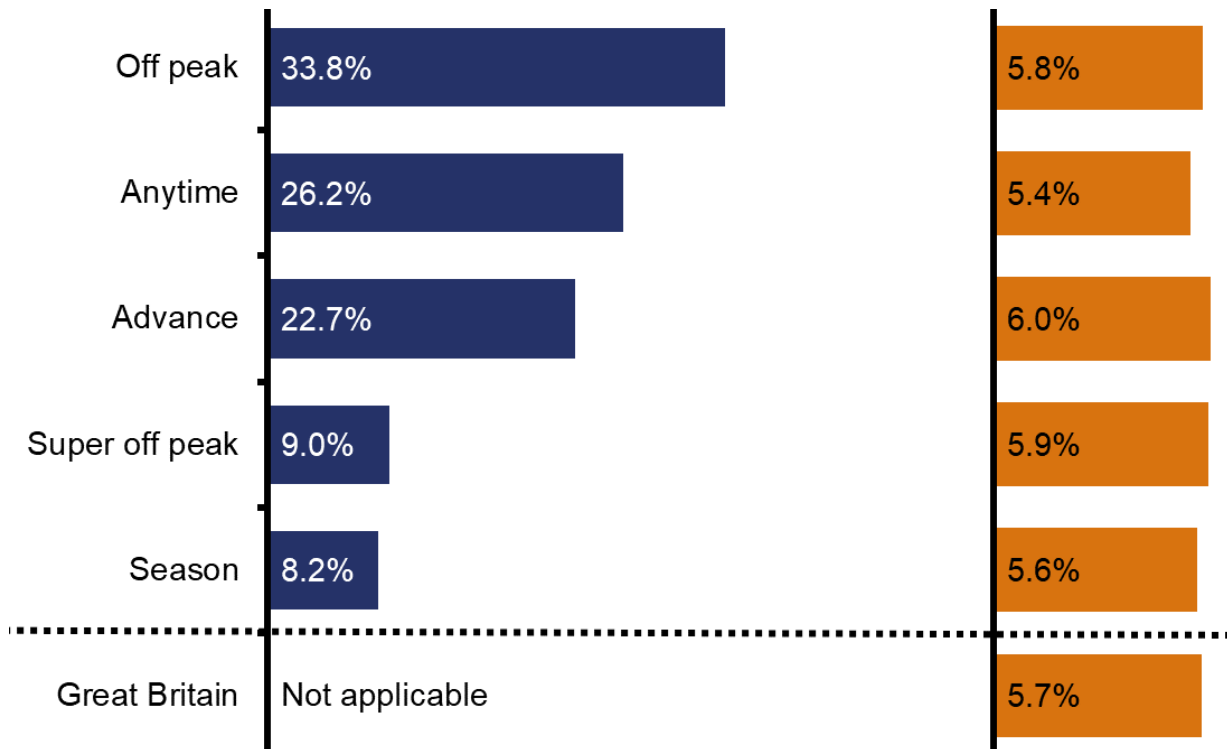Unregulated first class fares increased by 8.2% compared with March 2022. This was driven by an 8.9% increase in the Long distance sector, which accounts for over 80% of revenue for first class travel.

Unregulated standard class fares saw an increase of 5.6% compared with 2022. Fares increased across all sectors; 6.2% in the London and South East sector, 5.5% in the Long distance sector and 4.5% 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 8.2%

Revenue share (March 2022 to February 2023) and annual change in rail fares by ticket type, Great Britain, annual data, 2023

Ticket type	Revenue share	Annual change
Off peak	33.8%	5.8%
Anytime	26.2%	5.4%
Advance	22.7%	6.0%
Super off peak	9.0%	5.9%
Season	8.2%	5.6%
Great Britain	Not applicable	5.7%

The average fare increase across Great Britain from 5 March 2023 was 5.7%.

All fare types saw increases of between 5% and 6%. Off peak tickets account for just over a third of all revenue, reflecting the increased weekend demand and the share of revenue for leisure travel post-pandemic. Anytime tickets accounted for just over a quarter of revenue in the year preceding the fare increase, and prices on those tickets increased by 5.4%, the lowest increase across all fare groups. This was partially driven by a price freeze on some Avanti West Coast open return tickets.

The highest percentage increase of 6.0% was for Advance fares, where market share increased to an all-time high of 22.7%.

Season ticket fares increased by 5.6% but their share of revenue fell to 8.2% compared with 8.9% in the previous year.

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 Railways, Elizabeth line, Govia Thameslink Railway, Greater Anglia, London Overground, Southeastern, South Western Railway.

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

- **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 5 March 2023, this year's revenue weights cover March 2022 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 is usually based on the 12-month change in the July 'All Items' RPI that precedes the annual fare change. Due to the high-level of inflation, the 2023 increase was instead linked to average earnings growth. We continue to use the March 2023 '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 2022 and March 2023. 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

- Table 7180: Average change in fares by regulated and unregulated tickets
- Table 7182: Average change in fares by ticket type

Other related statistics

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 five annual publications: **Common Safety Indicators; Passenger satisfaction with complaints handling; 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.

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