

31 July 2025

Background:

This annual statistical release contains information on rail fares in Great Britain. It covers the **average change in fares** for mainline operators.

Statistics are presented by **sector, ticket type, class** and **regulated status**.

Sources: LENNON ticketing and revenue system, Rail Delivery Group, and Office for National Statistics.

Latest year: 2025 (change since 2024)

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Next publication:

July 2026 (TBC)

RPI measures the change in price of goods and services. It is historically used by government to cap changes in regulated fares. In 2023 and 2024, alternatives caps were used due to high inflation. In 2025, RPI was again used as a basis.

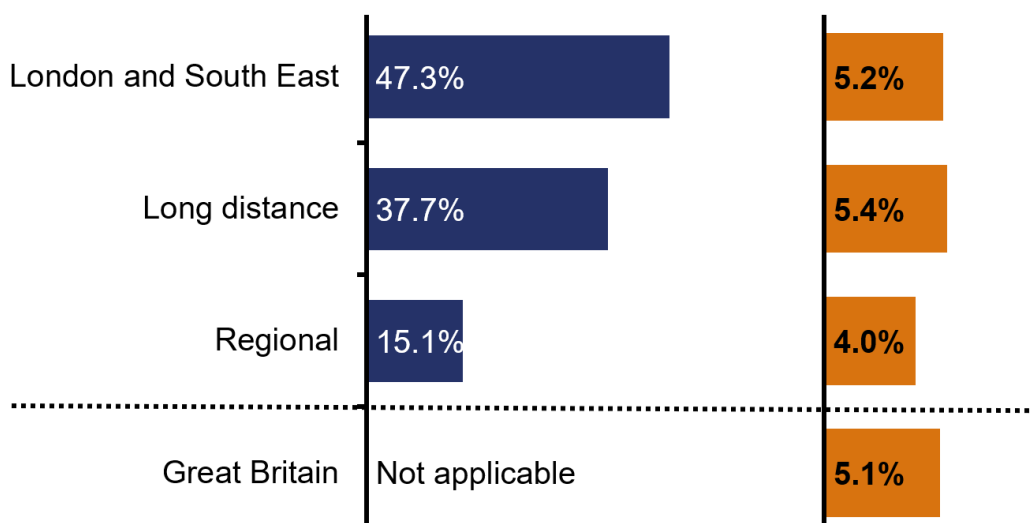
New rail fares were introduced across England and Wales from 2 March 2025, with new Scotrail fares introduced from 1 April 2025. This release compares the change in prices across Great Britain between 2024 and 2025, and earlier years.

Rail fares across Great Britain increased by 5.1% in 2025 compared with a 3.2% increase in the Retail Prices Index (RPI) between March 2024 and March 2025.

Regulated rail fares increased by 4.5%, slightly under the cap set for England and Wales of 4.6%. Fares in Scotland increased by 3.8% in April 2025.

Fares in the London and South East sector, which accounts for almost half of all fare revenue, increased by 5.2% compared with 2024. Long distance and Regional fares increased by 5.4% and 4.0% respectively.

Figure 1: Revenue share (March 2024 to February 2025) and annual change in rail fares by sector, Great Britain, annual data, 2025



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.

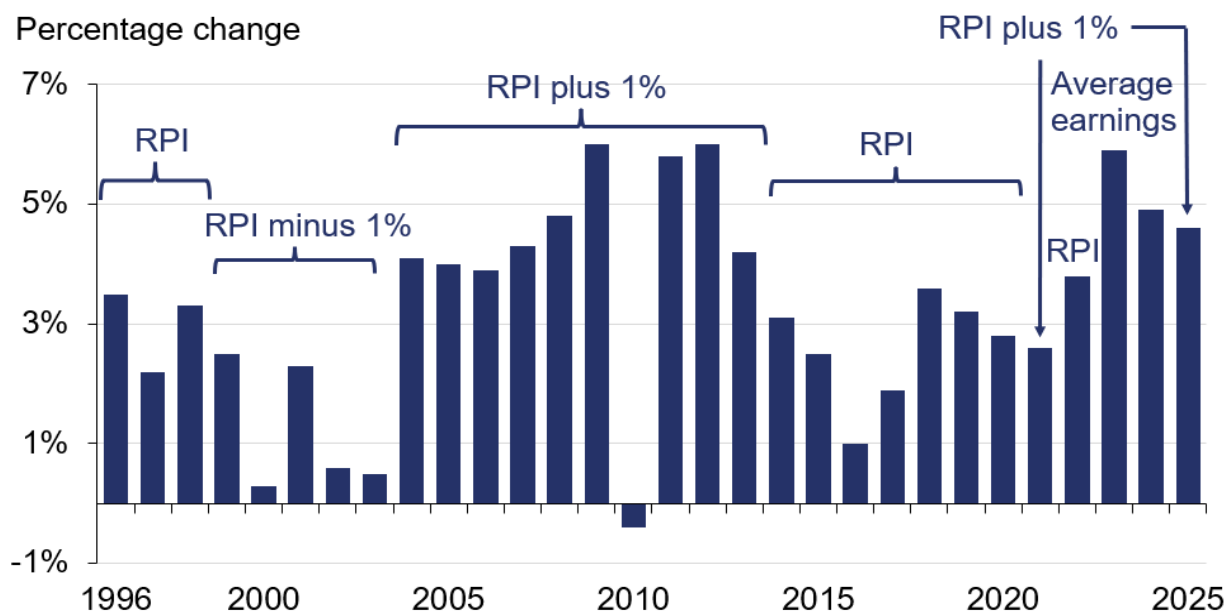
1. Average change in regulated and unregulated fares

Regulated fares are standard class fares including saver returns, standard returns, off-peak fares between major cities and season tickets for most journeys.

The change in regulated fares across Great Britain in 2025 was 4.5%. [The increase in England and Wales](#) was capped by the government at 4.6% for 2025, based on the July RPI+1%. [Scotrail fares increased by 3.8% in April 2025](#), however 20% discounts on the cost of regulated season tickets were extended to September 2025.

Figure 1.1: Regulated cap of 4.6% in 2025 was down from the 4.9% cap last year

Annual regulated fares cap, England and Wales, annual data, 1996 to 2025



Unregulated fares include first class, advance purchase and saver tickets. Train operators are free to determine these fares.

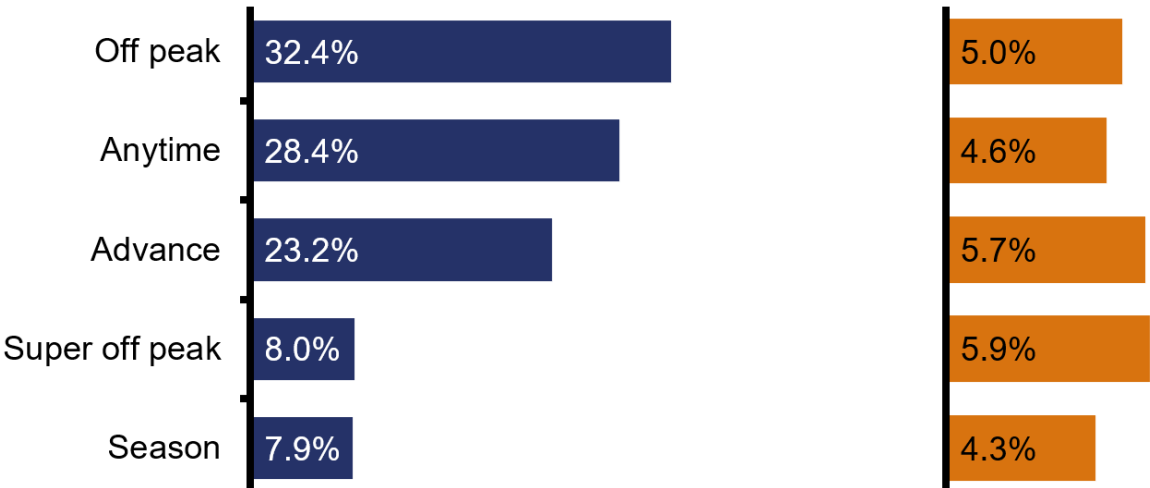
Unregulated first class fares increased by 3.7% compared with 2024. Despite increases in excess of that within the London and South East (7.1%) and Regional (4.8%) sectors, those were offset by a 3.2% increase in the Long distance sector, which accounts for over 80% of first class revenue.

Unregulated standard class fares increased by 5.5% compared with 2024. The Long distance sector saw the largest increase of 5.8%. Fares in London and the South East increased by 5.7% whilst Regional fares increased by 4.1%, partially driven by the lower fare increases across Scotland.

2. Average change in price by ticket type

Figure 2.1: Off peak tickets account for over a third of all fare revenue

Revenue share (March 2024 to February 2025) and annual change in rail fares by ticket type, Great Britain, annual data, 2025



Off peak fares increased by 5.0% compared with 2024. They account for the largest proportion of revenue despite a fall in their market share. The fall from 37.1% to 32.4% can be partly explained by the [Scottish Government's off peak all-day fares trial ending in September 2024](#) which resulted in peak fares being re-introduced, however it has since been announced that [peak fares are to be scrapped in Scotland](#) from 1 September 2025.

The reduction in market share for off-peak tickets led to increases for anytime and advance tickets. Anytime tickets saw market share increase by 4 percentage points, to 28.4%, in the twelve months to February 2025, whilst prices increased 4.6%.

Advance tickets increased their market share to 23.2% in 2025, up from 16.1% a decade ago. The Long-distance sector is responsible for three-quarters of all travel on advance tickets and prices increased on those tickets by 5.9% compared with 2024. There were also increases in the London and South East (9.7%) and Regional (2.2%) sectors, leading to an overall increase of 5.7% for advance fares.

Season ticket prices went up by 4.3% compared with 2024. London and South East and Long-distance sectors increased by 4.7% and 4.4% respectively. However, these increases were partially offset by a 1.7% increase in the Regional sector. This comparatively low increase was a result of [Scotrail's continuation of a 20% discount on season tickets](#) and [Transport for Wales' increase of 3.5% on weekly 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 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 in March 2025 in England and Wales, this year's revenue weights cover March 2024 to February 2025 inclusive. For consistency, the revenue weights for all of Great Britain cover that same period despite the rail fare change in Scotland being introduced in April 2025.
- **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 was historically based on the 12-month change in the July 'All Items' RPI that precedes the annual fare change. However, due to high levels of inflation in 2023 and 2024, the link to RPI was not used in setting the fare cap. However, in 2025, the link to RPI returned and the regulated fares cap for England and Wales was set at 4.6%, based on the July 2024 RPI + 1%.

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 2024 and March 2025. 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 within this release. However, there have been revisions to revenue per journey figures presented in table 7182 due to passenger journeys data being revised for the Regional sector. Details of this and 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

Our statistical practice is regulated by the Office for Statistics Regulation (OSR). OSR sets the standards of trustworthiness, quality and value in the [Code of Practice for Statistics](#) that all producers of official statistics should adhere to. You are welcome to contact us directly with any comments about how we meet these standards by emailing rail.stats@orr.gov.uk. Alternatively, you can contact OSR by emailing regulation@statistics.gov.uk or via the OSR website.

Statistical releases

This publication is part of ORR's '[accredited official statistics](#)', 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 environment; Regional rail usage**; one biannual publication: **Passenger rail service complaints** and three quarterly publications: **Passenger rail performance; Freight rail usage and performance; Passenger rail usage**.

ORR also publishes a number of other official statistics, which consist of five annual publications: **Common Safety Indicators; Passenger satisfaction with complaints handling; Train operating company key statistics; Occupational health; Rail statistics compendium**; one biannual publication: **Passenger lifts at stations** (official statistics in development) 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.

Accredited official statistics

Accredited official statistics are called National Statistics in the Statistics and Registration Service Act 2007. They are official statistics that have been independently reviewed by the Office for Statistics Regulation and found to comply with the standards of trustworthiness, quality and value in the Code of Practice for Statistics.

The majority of our [statistical releases were independently reviewed by the OSR in June 2012](#). They comply with the standards of trustworthiness, quality and value in the [Code of Practice for Statistics](#) and are labelled accredited official statistics.

Since our review 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 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 accredited official 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 [independently reviewed by OSR](#) in November 2020 and [their accreditation was confirmed](#) on 1 December 2020.

For more information on how we adhere to the Code please see our [compliance statements](#).

If you have any feedback or questions, please email rail.stats@orr.gov.uk.



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