

18 July 2024

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: 2024 (change since 2023)

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July 2025 (TBC)

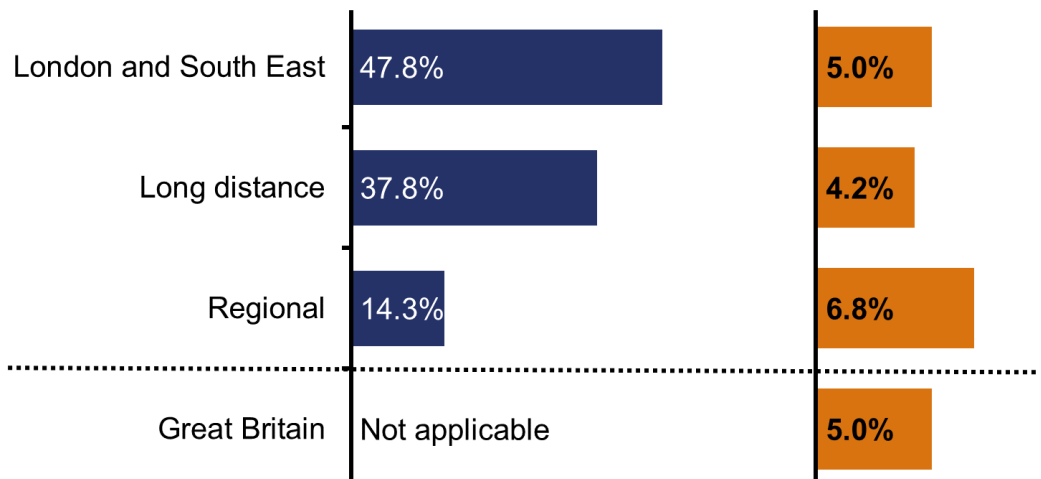
RPI measures the change in price of a sample of retail goods and services. It is used as a comparison for rail fares as it has been used to cap regulated fares. Due to high inflation in the last two years, governments have set alternative caps.

New rail fares were introduced across England and Wales from 3 March 2024, with new Scotrail fares introduced from 1 April 2024. This release compares the change in prices across Great Britain between 2023 and 2024, and earlier years. In last year’s release, Scotrail fares were frozen as their 2023 price change came into effect on 1 July 2023, outside of our data collection period. Consequently, this year’s release captures the effect of two Scotrail fare changes; [the 2023 increase of 4.8%](#) and the [8.7% increase that came into effect on 1 April 2024](#).

Rail fares across Great Britain increased by 5.0% in 2024 compared with a 4.3% increase in the Retail Prices Index (RPI) between March 2023 and March 2024. Regulated fares increased by 5.1%.

Fares in the Regional sector had the largest percentage increase of 6.8%, driven by the rise in Scotrail fares. London and South East fares increased by 5.0% while Long distance fares increased by 4.2%.

Figure 1: Revenue share (March 2023 to February 2024) and annual change in rail fares by sector, Great Britain, annual data, 2024



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.

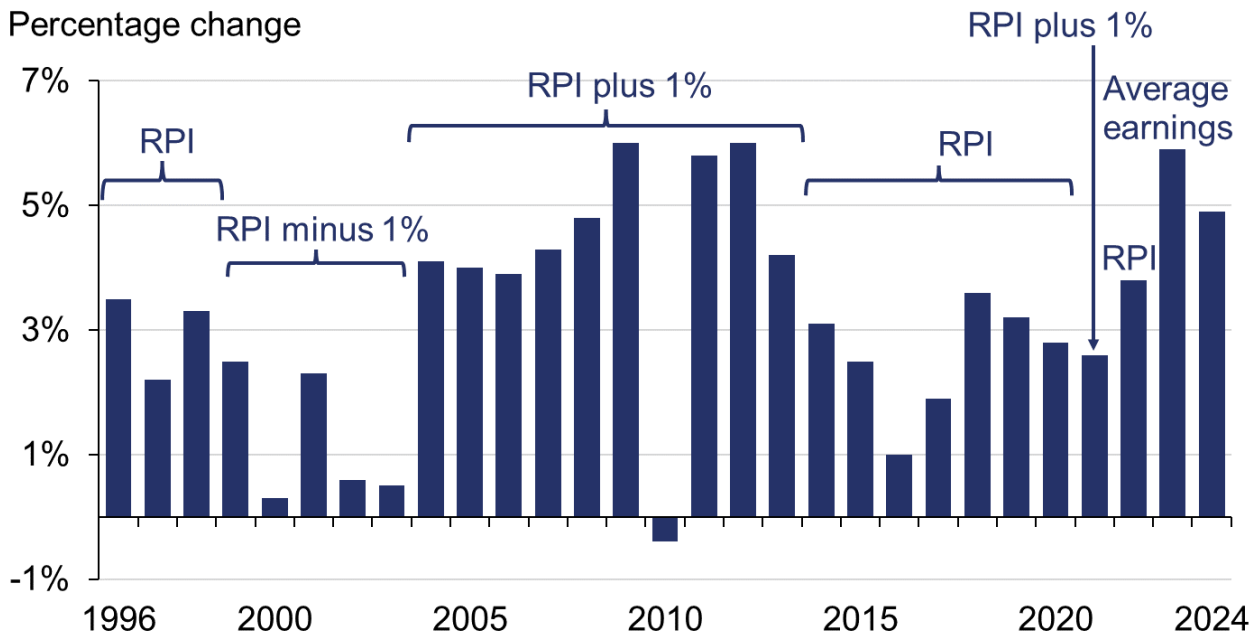
1. Average change in regulated and unregulated fares

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 2024 was 5.1%. This is usually associated with the July RPI. However, with RPI standing at 9.0% in July 2023, the average [increase in regulated rail fares in England and Wales](#) was capped at 4.9% by government. [Scotrail fares increased by 8.7% from April 2024](#).

Figure 1.1: Regulated cap of 4.9% in 2024 was down from the 5.9% cap last year

Annual regulated fares cap, England and Wales, annual data, 1996 to 2024



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.

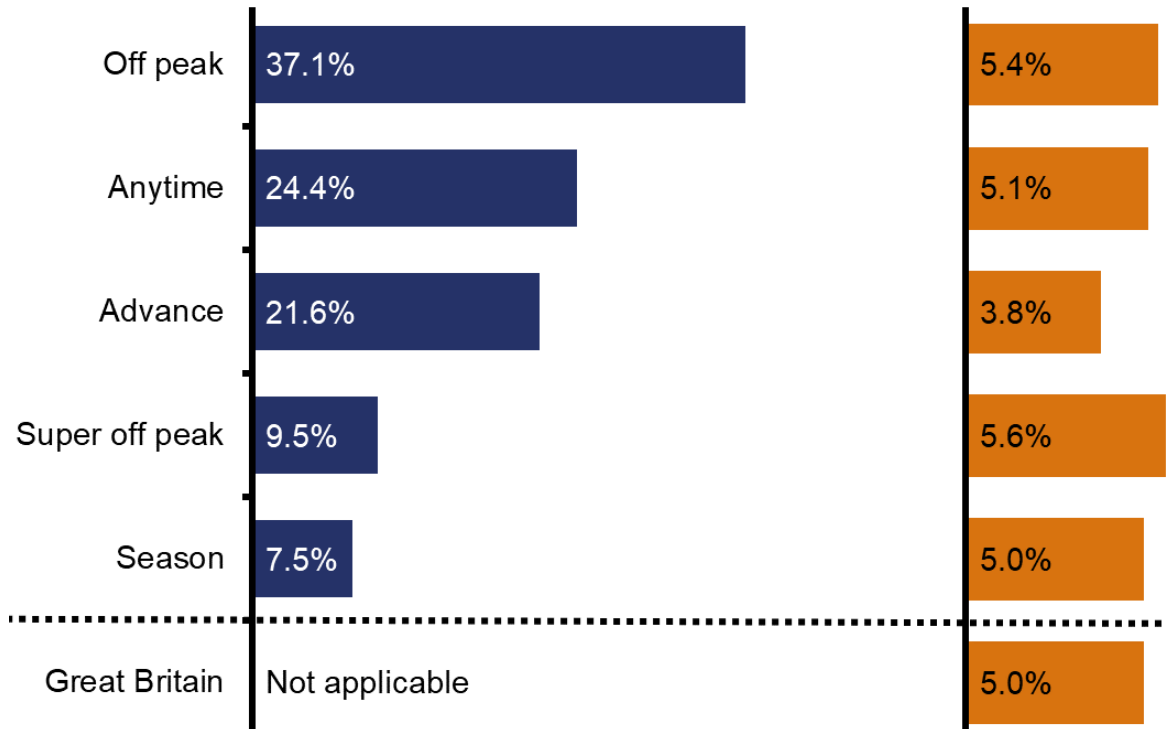
Unregulated first class fares increased by 6.7% compared with 2023. This was driven by a 6.9% increase in the Long distance sector, which accounts for over 80% of revenue for first class travel.

Unregulated standard class fares saw an increase of 4.8% compared with 2023, with increases across all sectors; 6.8% in the Regional sector, 5.0% in the London and South East sector and 3.7% in the Long distance sector.

2. Average change in price by ticket type

Figure 2.1: Market share of revenue for off peak fares increased from 33.8% to 37.1%

Revenue share (March 2023 to February 2024) and annual change in rail fares by ticket type, Great Britain, annual data, 2024



Off peak tickets account for the largest proportion of revenue, increasing their market share to over 37% in the latest year. This increase has been aided by initiatives such as [Scotrail's peak fares removal pilot](#) launched in October 2023, which meant that off-peak fares were valid all day. Prices on off peak tickets increased by 5.4% compared with 2023.

Advance tickets saw the lowest percentage increase of any fare type between 2023 and 2024. The overall 3.8% increase was largely attributable to the 3.3% rise in the Long distance sector; over three quarters of all travel on advance tickets is in the Long distance sector. However, the increase was inflated by an 8.3% rise in the Regional sector.

Season ticket prices went up by 5.0% compared with 2023. Pre-pandemic, season tickets held a revenue share of around 20% but fell to 7.5% in the latest year, the lowest share of revenue across all ticket types.

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 2024 in England and Wales, this year's revenue weights cover March 2023 to February 2024 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 2024.
- **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 over the last two years, the 2023 cap was instead linked to the change in average earnings. For 2024, the percentage change in the 'All Items' RPI stood at 9% in July 2023 and the government announced that fares would be capped at 4.9% for England and Wales.

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 2023 and March 2024. 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 as a result of passenger journeys data being revised for the London and South East and Regional sectors. 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 emissions; Regional rail usage**; and four quarterly publications: **Passenger rail performance; Freight rail usage and performance; Passenger rail usage; Passenger rail service complaints**.

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**; 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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