Rail Trends, Great Britain 2011/12

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Department for Transport

Introduction

This factsheet provides an overview of key statistics on the rail industry in Great Britain. These statistics relate to the national rail network, so do not include underground, light rail and tram systems. This factsheet covers statistics on:

1. Rail usage
2. Punctuality and reliability
3. Passenger satisfaction
4. Passenger revenue and Government support
5. Fares
6. Safety
7. Freight

Since privatisation in the mid-1990s, passenger and freight services on the rail network in Great Britain have been provided by a number of private sector companies. Most passenger rail travel is made with the nineteen franchised operators, but there are also a small number of non-franchised operators. Franchised operators are split into three sectors:

- long-distance operators, which primarily operate long-distance routes around the country
- London & South East operators, which primarily operate local routes in London and the South East
- regional operators, which primarily operate local routes in the rest of the country

Some operators have routes in more than one sector, for example First Great Western operates in all three.

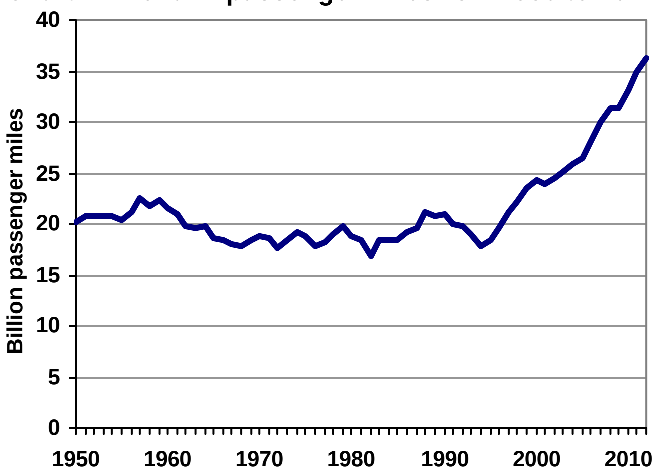
1. Rail usage

In 2011/12 rail passengers made 1.5 billion journeys with franchised operators, travelling 35 billion miles.

After remaining at around the same level for several decades, rail use in Great Britain has seen large increases since the mid-1990s. The number of journeys has doubled since 1994/95, and increased by a quarter in the last 5 years.

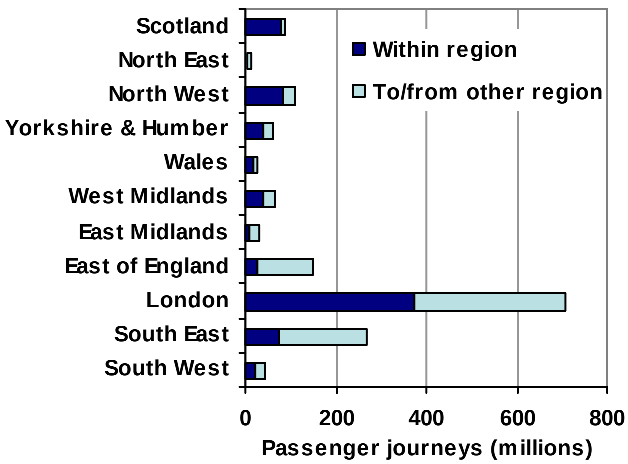
In 2011/12, 68 per cent of journeys were made with London & South East operators, 23 per cent with regional operators and 9 per cent with long-distance operators.

Chart 1: Trend in passenger miles: GB 1950 to 2012



Source: Office of Rail Regulation (ORR)

Chart 2: Rail journeys by region: GB 2010/11



Source: Office of Rail Regulation (ORR)

In 2010/11, 61 per cent of all rail journeys in Great Britain started or finished in London. The South East and the East of England were the regions with the next highest numbers of journeys, but 65 per cent of journeys in the South East and 76 per cent in the East of England were to or from London.

In the north of England, the North West had the highest number of rail journeys, with 10 per cent of all journeys starting or finishing in the region.

Seven per cent of all rail journeys started or finished in Scotland and 2 per cent in Wales.

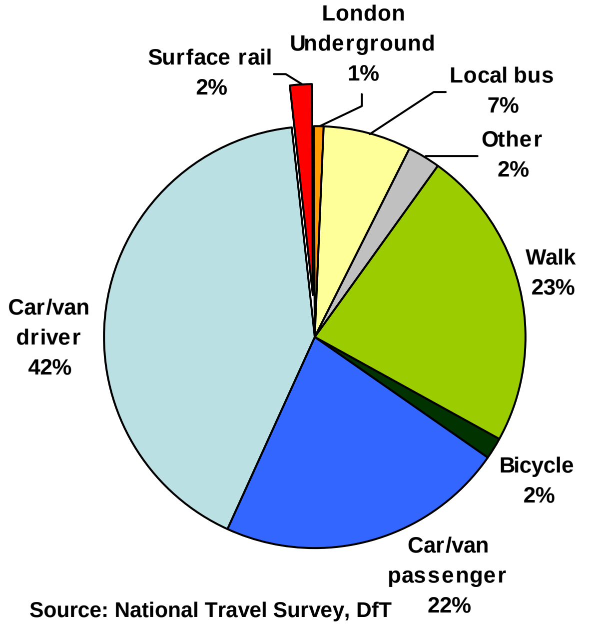
The National Travel Survey shows that the average person in Great Britain made 17 trips in 2011 where surface rail was the main mode of travel, travelling 530 miles. Rail was the main mode of travel for 2 per cent of all trips, but 8 per cent of distance travelled.

A higher proportion of trips covering longer distances were made by rail, which was the main mode of travel for 8 per cent of trips over 10 miles and 15 per cent of trips over 100 miles.

Twice as many journeys were made per day on weekdays than at weekends. On weekdays 50 per cent of rail trips were for commuting purposes, 9 per cent for business and 21 per cent for leisure.

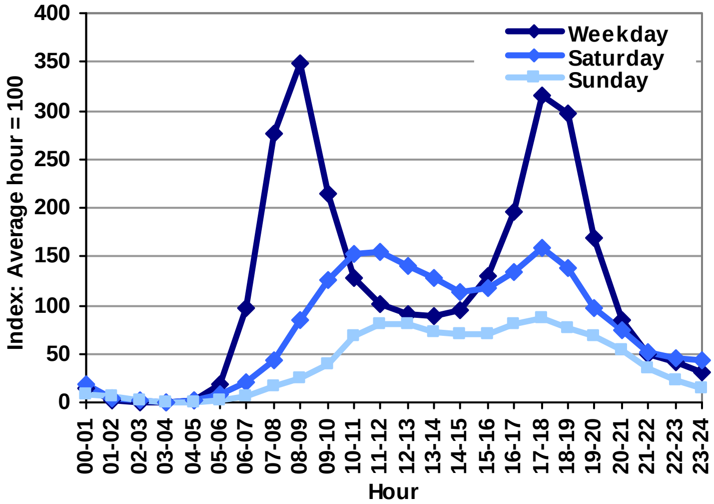
Conversely, on weekends 62 per cent of rail trips were for leisure purposes and 17 per cent for shopping. Only 13 per cent were for commuting or business.

Chart 3: Trips by main mode of travel: GB 2011



Source: National Travel Survey, DfT

Chart 4: Average surface rail trips in progress by hour and day of week: GB 2005-10



Source: National Travel Survey, DfT

Chart 4 shows the trends in rail travel during the day on weekdays and weekends, based on National Travel Survey data from 2005-2010 combined.

Rail travel on weekdays predominantly reflects commuting patterns, with the majority of trips being made in two peaks in the morning and the early evening.

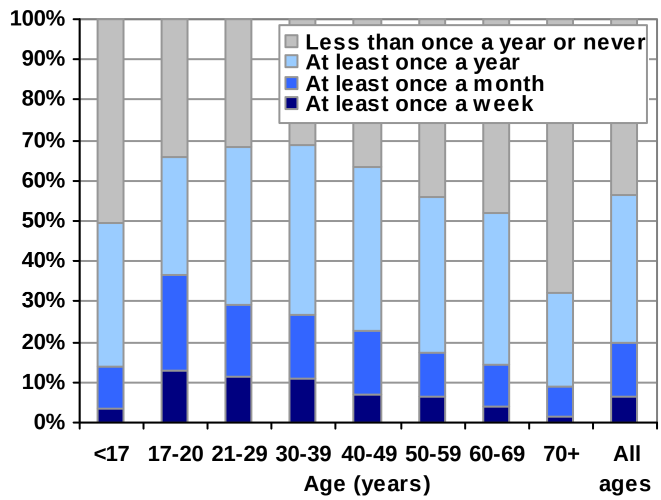
Weekend travel is more evenly spread during the day but still has two distinct peaks. Twice as many trips are made on Saturdays as on Sundays.

Chart 5 shows the frequency of rail use by age group. Overall, 56 per cent of respondents reported using surface rail at least once a year, with 7 per cent using surface rail at least once a week.

Thirty seven per cent of those aged 17-20 reported using surface rail at least once a month, compared to only 14 per cent of those under 17.

Sixty nine per cent of respondents aged 30-39 reported using surface rail at least once a year, but this figure dropped to 32 per cent for those aged 70 and over.

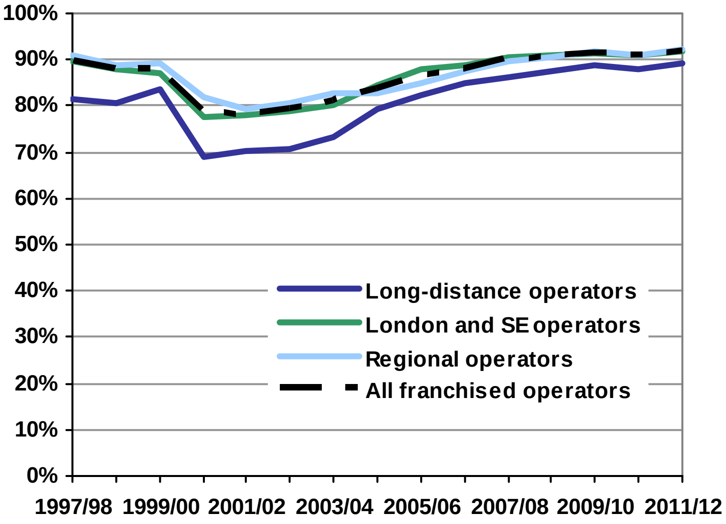
Chart 5: Surface rail usage by age: GB 2011



Source: National Travel Survey, DfT

2. Punctuality and reliability

Chart 6: Percentage of trains arriving on time: GB 1997/98 to 2011/12



Source: Office of Rail Regulation (ORR)

The public performance measure (PPM) is an indicator of the performance and reliability of Britain's railways. It is the proportion of passenger trains that arrive at their final destination on time (defined as within 5 minutes of the timetabled time for regional and London & South East train services, and 10 minutes for long-distance services).

In 2011/12, 91.6 per cent of franchised operators' trains arrived at their destinations on time, an increase from 90.8 per cent the previous year. This figure was slightly lower for long-distance operators, at 89.2 per cent.

PPM fell sharply in the aftermath of the Hatfield crash in October 2000, when emergency speed restrictions were introduced across the network as a safety precaution. But it has increased steadily since then and has been above 90 per cent each year since 2008/09.

3. Passenger satisfaction

The National Passenger Survey (NPS) showed that 85 per cent of passengers in Great Britain in autumn 2012 were satisfied with their journey overall. This is an increase from 84 per cent in autumn 2011, and is the highest figure recorded since the survey began in 1999.

Only 47 per cent of passengers were satisfied with the value for money for the price of their ticket, and this dropped to 43 per cent for London & South East operators. Eighty-three per cent of passengers were satisfied with the punctuality/reliability of their trains and 69 per cent were satisfied that there was sufficient room for all passengers to stand or sit.

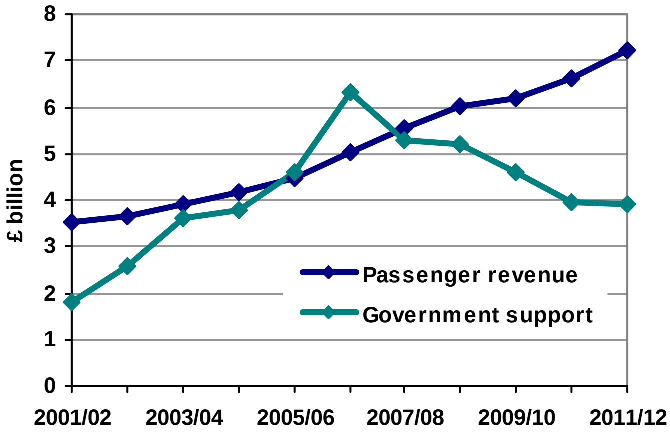
Out of the factors that the NPS asks passengers to rate, satisfaction with the punctuality/reliability of their train is the factor that has the strongest correlation with whether a passenger will say they were satisfied with their journey overall. Conversely, the factor that has the strongest correlation with dissatisfaction overall is how passengers rate the way that a train operator deals with delays.

4. Passenger revenue and Government support

In 2011/12, franchised train operators received £7.2 billion in revenue from passengers. Thirty two per cent of this came from off-peak tickets, 29 per cent from anytime/peak tickets, and 25 per cent from season tickets. Revenue has steadily increased in recent years as rail use has increased, doubling in the last ten years.

Government support to the rail industry was £3.9 billion in 2011/12. The majority of this was the £3.7 billion grant paid to Network Rail, the owner and operator of the railway infrastructure. Government received a net premium of £133 million from train operators, as some operators receive a subsidy from Government while others pay a premium. Having risen to a peak of £6.3 billion in 2006/07, overall Government support has since been falling.

Chart 7: Passenger revenue and Government support: 2001/02 to 2011/12



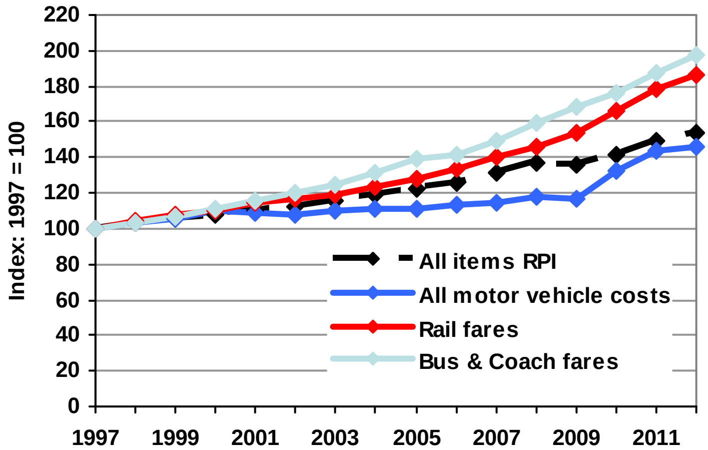
Source: Office of Rail Regulation (ORR)

5. Fares

The rail fares component of the Retail Price Index (RPI) increased by 87 per cent between 1997 and 2012. This compares to a 54 per cent increase in RPI overall, meaning that in real terms rail fares increased by 21 per cent.

This increase compares to a 6 per cent real terms reduction in motoring costs over this period, while bus and coach fares increased in real terms by 28 per cent.

Chart 8: Retail Price Index, transport components and all items: 1997 to 2012



Source: Retail Price Index, Office for National Statistics (ONS)

6. Safety

Rail has one of the lowest passenger casualty rates of any mode of transport. In 2011/12, 4 passengers and 1 railway worker were killed on the rail network, none of them in train accidents. In total there were 302 fatalities on the rail network, of which 236 (78 per cent) were suicides and 53 (18 per cent) trespassers.

7. Freight

In recent years between 8 and 9 per cent of freight moved in Great Britain each year has been moved by rail. Freight traffic is measured in net tonne kilometres (NTKm), so it takes into account both the weight of the goods and the distance they travel. In 2011/12 the amount of freight moved by rail was 21 billion NTKm. Thirty per cent of freight moved was coal, the highest proportion for any commodity. A further thirty per cent of freight moved was domestic intermodal freight, consisting of freight transported in intermodal containers, including goods that have arrived by sea at ports. Two per cent of freight moved was international freight travelling through the Channel Tunnel.

Further Information

The statistics in this factsheet about rail usage, performance, subsidy, revenue and freight are published by the Office of Rail Regulation (ORR) and can be found on the ORR website:
http://www.rail-reg.gov.uk/server/show/nav.1527

Other statistics used in this factsheet and further information about them can be found at the following links:

National Travel Survey (DfT):
https://www.gov.uk/government/organisations/department-for-transport/series/national-travel-survey-statistics

National Passenger Survey (Passenger Focus):
http://www.passengerfocus.org.uk/research/national-passenger-survey-introduction

Annual Safety Performance Report (Rail Safety and Standards Board):
http://www.rssb.co.uk/spr/reports/pages/default.aspx

Retail Price Index (Office for National Statistics):
http://www.ons.gov.uk/ons/rel/cpi/consumer-price-indices/index.html

Any enquiries relating to the figures in this factsheet or requests for further information on rail statistics can be addressed to the Rail Statistics branch at the Department for Transport:

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