2013-14 Quarter 2 Statistical Release

Passenger Rail Usage

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Timetabled train kilometres (TTKM), passenger kilometres, passenger journeys and passenger revenue

2013 – 14 Quarter 2 (1 July to 30 September 2013)
Release date: 28 November 2013
Next publication date: 20 February 2014

Contents

Introduction

This release contains information on passenger rail usage in Great Britain covering the period from 2002-03 with the latest data in this release referring to 2013-14 Quarter 2 (1 July 2013 to 30 September 2013). The data covered within the release are:

- Timetabled Train Kilometres (TTKM) – the number of train kilometres each train operator would achieve if they operated 100% of their timetable;
- Passenger Kilometres - the number of kilometres travelled by passengers on the network;
- Passenger Journeys[1] - the number of passenger journeys made on the network; and
- Passenger Revenue - all ticket revenue and miscellaneous charges associated with passenger travel on national railways, but not including government support or grants.

Measures of rail usage are key indicators of the levels of rail use in Great Britain. They show the number of passengers using the network and journeys made on it, providing an indication of the levels of demand for rail travel. This can help in both short-term and long-term planning for the industry and wider stakeholders, both at a National level and within the rail sectors[2].

Passenger kilometres and passenger journeys data are linked, as the number of journeys made by a passenger impacts the number of kilometres travelled. For example, if the number of passenger journeys increases, you would expect to see an increase in the number of passenger kilometres travelled.

Passenger revenue data provides an insight into revenue levels within the industry as well as the levels of revenue generated through each ticket type, which can highlight changes in ticket purchasing trends.

An increase in passenger revenue is generally a direct consequence of increased passenger journeys. The percentage change in passenger revenue can often outstrip the equivalent passenger journeys and passenger kilometres measures as a result of the fare increases usually announced in January each year.

All the data contained within this release are sourced from the Association of Train Operating Companies (ATOC), the rail industry's ticketing and revenue database (LENNON) and the train operating companies (TOCs). For more detail on data collection, the methodology used to calculate the data within this release

[1] A journey is based on travel from an origin station to a destination station. A train journey may include one or more changes of train, and one journey is generated for each train used.

[2] The rail network is divided into 3 sectors – London and South East, long distance and regional. A list of train operating companies is available at http://www.atoc.org/train-companies/

and details of which services are included in each sector, please see the accompanying quality report which can be found at: Quality Reports

This is a quarterly release and the data in this release refers to 2013-14 Q2, 1 July 2013 to 30 September 2013. All the data contained and referred to within this release can be accessed via the ORR Data Portal

National Statistics

The United Kingdom Statistics Authority designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007, signifying compliance with the Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods; and
- are managed impartially and objectively in the public interest.

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

For more details please contact the Statistics Head of Profession Jay Lindop at Jay.Lindop@orr.gsi.gov.uk or on 020 7282 3978 or contact rstats@orr.gsi.gov.uk

Summary of key results

- Rail usage has steadily increased in the last ten years with growth across all measures. Timetabled train kilometres have increased in each of the last ten years to meet the increasing demand for rail travel. The largest increase for timetabled train kilometres was in 2009-10 Q2 of 5.1%, mainly as a result of the upgrade to the West Coast Mainline being completed which increased the volume of services operated by Virgin Trains and London Midland. The only year-on-year decline in timetabled kilometres was a drop of -0.4% in 2012-13 Q4. Passenger journeys, kilometres and revenue have followed a similar growth trend in the last decade with kilometres and revenue increasing every year since 2002-03. Passenger journeys did experience a fall in 2009-10 when journeys on season tickets fell, possibly as a result of the recession; however 2009-10 was an exception and journeys have continued to grow since then.

- The total number of timetable train kilometres in 2013-14 Q2 has increased by 0.9% compared to 2012-13 Q2; a total increase of 1.1 million train kilometres in absolute numbers.

- The number of timetabled train kilometres for franchised operators in 2013-14 Q2 has increased by 0.8% compared to 2012-13 Q2, with the largest increase for franchised operators seen by London Overground (9.5%). The opening of the Surrey Quays to Clapham line in December 2012 and introduction of a new timetable in May 2011 have steadily increased London Overground's timetabled train kilometres.

- The number of timetabled train kilometres for the non-franchised operators increased by 4.6% in 2013-14 Q2 compared to 2012-13 Q2. This is the same percentage increase as the previous quarter. This is partly due to Grand Central trains operating an additional train per weekday between Hartlepool and London King's Cross from December 2012.

- In 2013-14 Q2 there were 15.1 billion franchised passenger kilometres, an increase of 1.7% compared to the same quarter last year. While this is the highest absolute number of kilometres recorded in a Q2 since the time series began, this is a weaker than average rate of growth than historically expected. Of the last of 10 Q2s only three have been lower – 2004-05,2005-06,2008-09 and 2009-10. Non-franchised passenger kilometres also increased by 13.3% compared to Q2 last year, aided by additional services and growth in travel on advance purchase tickets.

- The continued growth of passenger kilometres is likely to be due to the opening of new lines and further new franchised train services. Particular examples include the completion of the new orbital London railway which is less than a year old and suburban services in London. This growth has, however, been slightly offset by the reduction in demand for Olympic-related routes. Other possible factors contributing to this increase across the country could include the regeneration and promotion of areas, such as Glasgow and Edinburgh following the completion of recent engineering work in the central belt.

- In 2013-14 Q2, franchised passenger journeys reached 390.3 million, a 3.9% increase on the same quarter in 2012-13. This is the highest number of franchised passenger journeys within a Q2 since the time series began. The number of non-franchised passenger journeys was 11.5% higher than in 2012-13 Q2, which mirrors the growth seen in passenger kilometres.

- The passenger journeys figures highlight the effect of traffic growth and the corresponding increase in use of the rail system. There are a number of possible factors behind recent increases in rail usage such as the opening of new lines and stations, additional services/trains particularly on London Overground and Chiltern Railways. The increased demand for suburban travel to/from London and season tickets suggest that the driver behind this growth is work-related rather than leisure travel. Further factors could also include the upgraded West Coast Mainline and improved alternative travel methods during engineering works.

- The figures for passenger journeys do include an element of inflation since 2010-11 when Oyster PAYG data were first included but there was also an increase in travel across all ticket types (advance, anytime/peak and off-peak). The largest increases has been for advance fares (compared to the same quarter last year), suggesting passengers are taking advantage of the cheaper fares on offer when booking in advance.

- In 2013-14 Q2 total franchised passenger revenue was £2.0 billion, a 6.4% increase on 2012-13 Q2 and given the increased volume of passenger kilometres and journeys, this is to be expected. This is the highest amount of revenue generated within any quarter since the time series began. Non-franchised passenger revenue rose to a record high of £13.5million in 2013-14 Q2; a 10.2% increase compared to the same quarter last year. The percentage increase in revenue for non-franchised operators is slightly lower than the growth in non-franchised kilometres and journeys, suggesting that passengers are taking advantage of cheaper fares, for example special offers or advance purchase tickets.

- The increase in passenger revenue is generally a direct consequence of increased passenger journeys. The percentage change in passenger revenue can often outstrip the equivalent passenger journeys and passenger kilometres measures as a result of the fare increases usually announced in January each year.

1. Timetabled Train Kilometres (TTKM)

About TTKM

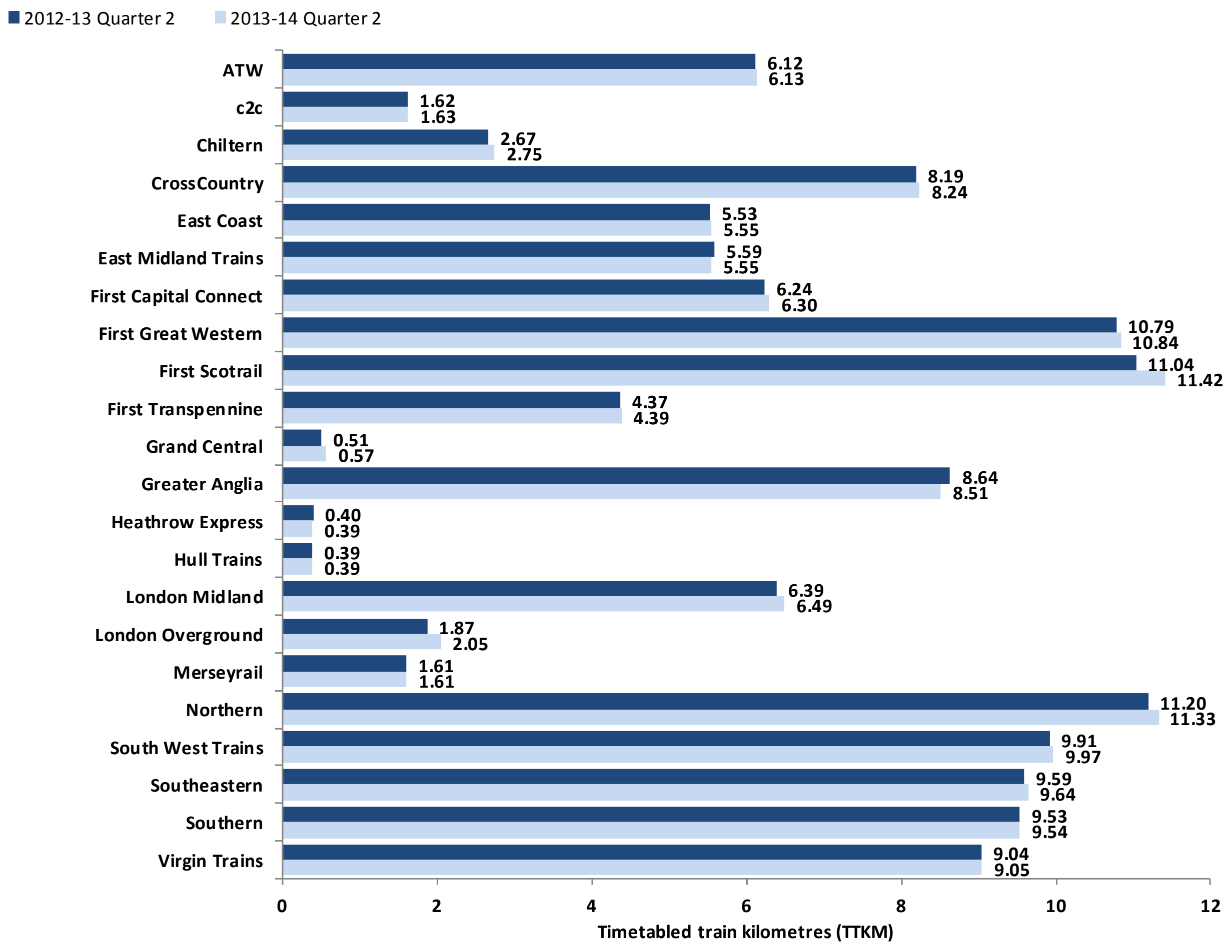
This timetabled train kilometres (TTKM) chart shows the number of train kilometres each train operator would achieve if they operated 100% of their timetable. The data are calculated from the summer and winter train timetables, operational in May and December each year. Measures of train kilometres are used by the rail industry to show the volume of service provision.

1.1 Timetabled train kilometres by train operating company

2013-14 Quarter 2 Results

Timetabled train kilometres (TTKM) by train operating company – chart

Train operating company data 2013-14 Q2 on 2012-13 Q2



- The total number of timetabled train kilometres in 2013-14 Q2 increased by 0.9% (1,133,695 km) compared to 2012-13 Q2. The largest increase in timetabled train kilometres for franchised operators was for London Overground (9.5%; 177,926 km). London Overground's timetabled train kilometres have steadily increased since the opening of the Surrey Quays to Clapham line in December 2012 and the introduction of a new timetable in May 2011, which improved train capacity and frequencies on many routes. In 2013-14 Q2 First ScotRail's timetabled train kilometres increased by 3.4% (378,415 km) when compared to 2012-13 Q2. The introduction of additional train services, from 9 December, as part of their winter timetable (up to May), may have contributed to this increase. The next largest increase was Chiltern, with an year-on-year increase of 3.0%. This is due to the introduction of additional Sunday services from Aylesbury to London Marylebone via Amersham in May 2013. The largest reduction in timetabled kilometres was Greater Anglia of -1.4% (123,490 fewer km). The reason for this is probably related to an on-going programme of rolling stock refurbishment.
- The number of train timetabled kilometres for the non-franchised operators (First Hull Trains, Grand Central and Heathrow Express) increased by 4.6% in 2013-14 Q2 compared to 2012-13 Q2. This is partly due to a 13.4% increase in timetabled kilometres for Grand Central who are operating an additional train per weekday between Hartlepool and London King's Cross from December 2012. Heathrow Express timetabled train kilometres decreased by 2.5% from 2012-13 Q2 to 2013-14 Q2 as a result of a small timetable change resulting in fewer trains after 2200 hours on weekdays and Sunday between February and December 2013.

TTKM by quarter data are presented here: Data Portal

A list of pre-created TTKM tables available on the data portal is presented in Annex 2.

Revisions: This is the first publication of this dataset.

Details of any revisions in the future will be found at: Revisions Log

2. Passenger Kilometres

About Passenger Kilometres

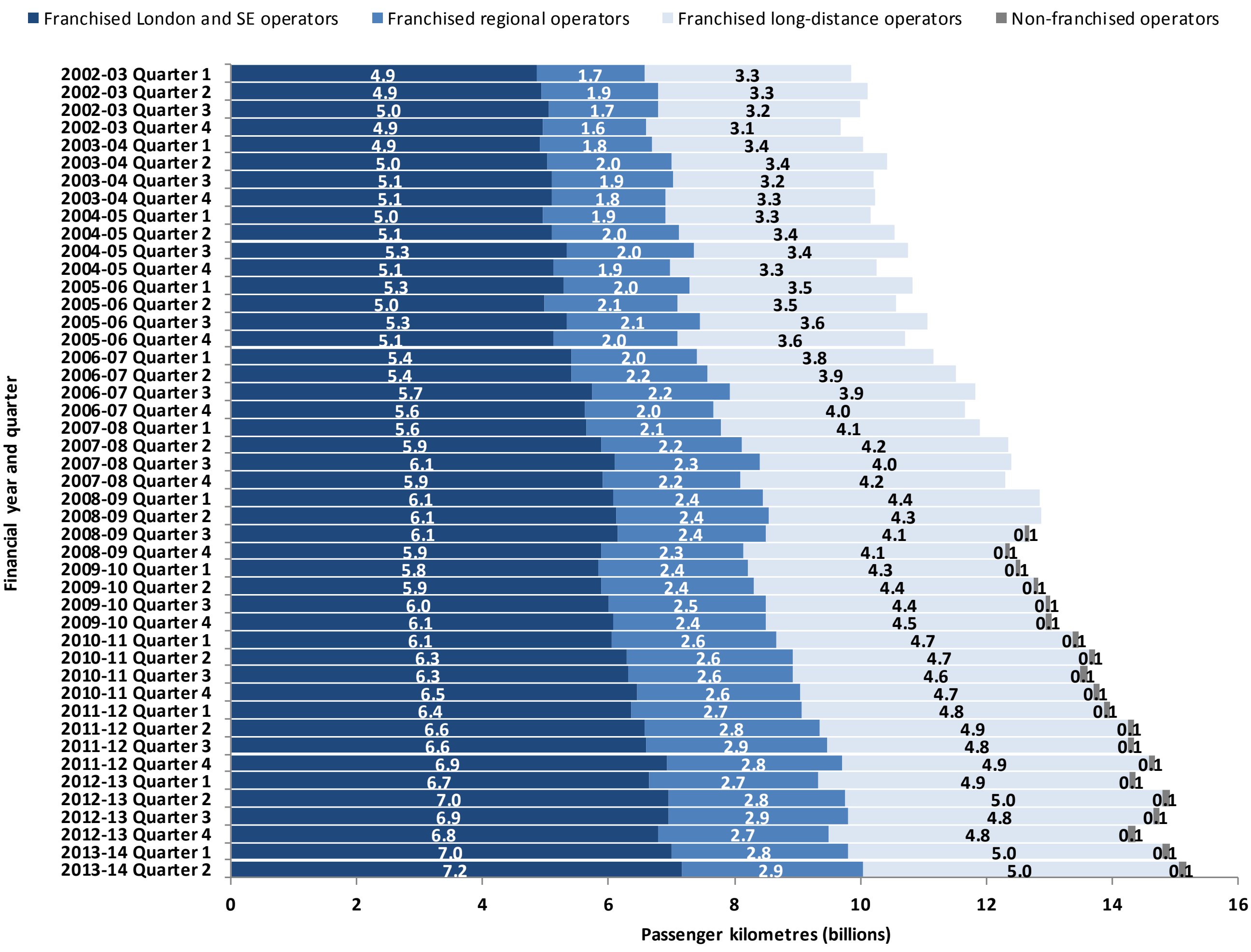
The number of kilometres travelled by passengers on the network. The data used to derive passenger kilometres are sourced from the LENNON (Latest Earnings Network Nationally Over Night) database and train operating companies.

2.1 Passenger kilometres by sector

2013-14 Quarter 2 Results

Passenger kilometres by sector – chart

Great Britain data 2002-03 Q1 to 2013-14 Q2



- In 2013-14 Q2 there were 15.1 billion franchised passenger kilometres, an increase of 1.7% compared to the same quarter last year. This is the highest number of kilometres recorded in a Q2 since the time series began, but is a noticeable reduction in the rate of increase compared to previous years. Non-franchised passenger kilometres also increased by 13.3% compared to Q2 last year, aided by additional services and growth in travel on advance purchase tickets.

- The continued growth of passenger kilometres is likely to be due to the opening of new lines and further new franchised train services. Particular examples include the completion of the new orbital London railway which is less than a year old and suburban services in London. This growth has, however, been slightly offset by the reduction in demand for Olympic-related routes the reduction in demand on Olympic-related routes. Other possible factors contributing to this increase across the country could include the regeneration and promotion of areas, such as Glasgow and Edinburgh following the completion of recent engineering work in the central belt.

- There were 2.9 billion passenger kilometres by franchised regional operators in 2013-14 Q2 this is a 2.2% increase compared to Q2 last year and was driven by an increase in season ticket travel.

- London and South East franchised operators, typically used by a higher proportion of commuters, had 7.2 billion passenger kilometres during 2013-14 Q2, a 2.8% increase on this time last year due to increases in usage for season ticket travel and advance purchase tickets.

- Long distance franchised operators was the only sector to decrease, by 0.1% on the equivalent quarter last year. This was due to reductions in off-peak and other tickets, which includes short-term promotional offers.

Passenger kilometres data are presented here: Data Portal

A list of pre-created passenger kilometres tables available on the data portal is presented in Annex 2.

Revisions: This is the first publication of this dataset.

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3. Passenger Journeys

About Passenger Journeys

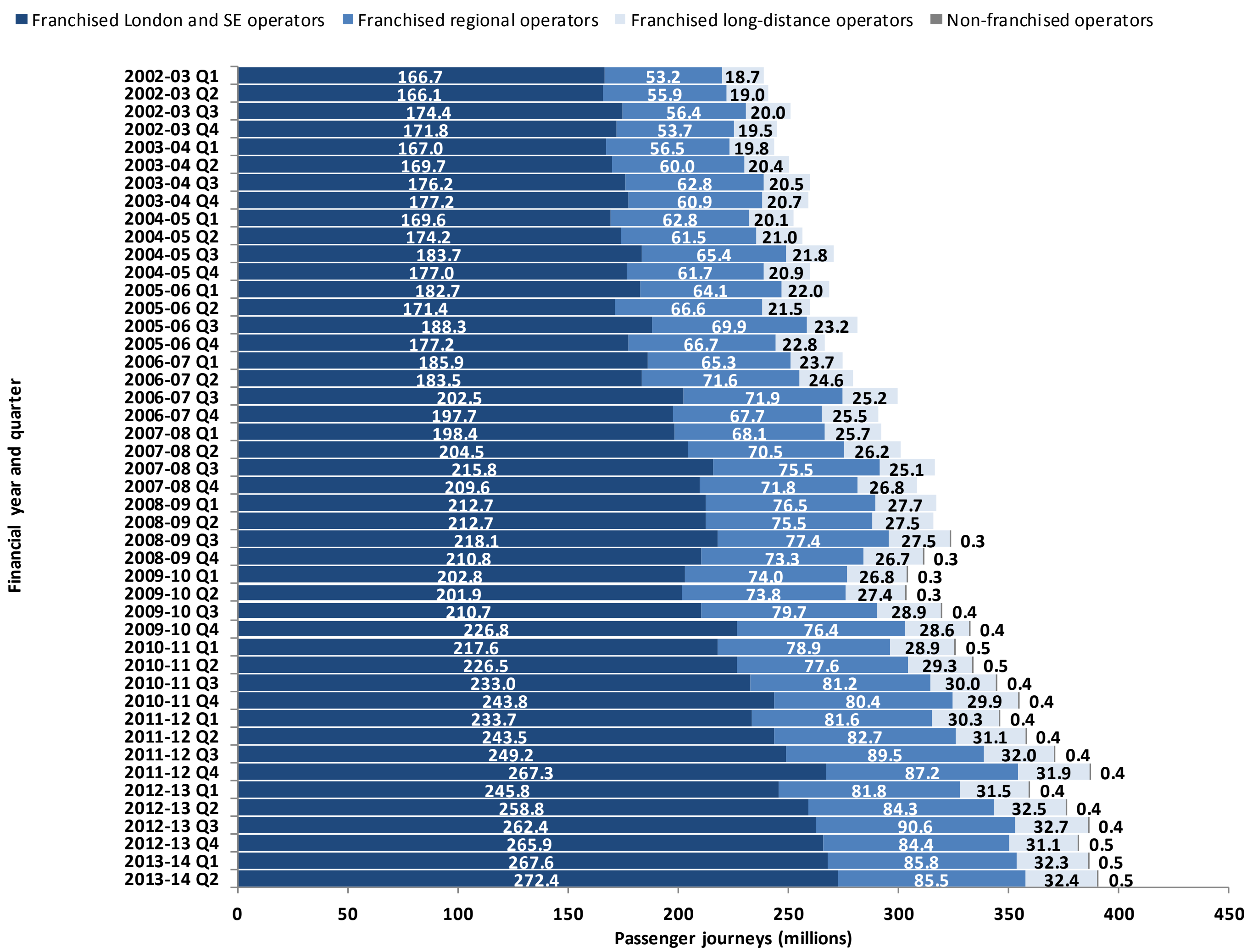
The number of passenger journeys made on the network. The data used to derive passenger journeys are sourced from the LENNON database and train operating companies.

3.1 Passenger journeys by sector

2013-14 Quarter 2 Results

Passenger journeys by sector – chart

Great Britain data 2002-03 Q2 to 2013-14 Q2



- In 2013-14 Q2, franchised passenger journeys reached 390.3 million, a 3.9% increase on the same quarter in 2012-13. This is the highest number of franchised passenger journeys since the time series began. Most of the increase is accounted for by growth in the number of season ticket journeys being made, rather than ordinary fares (growth rates of 9.5% and 0.4% on the previous year respectively). The number of non-franchised passenger journeys was 11.5% higher than in 2012-13 Q2, which broadly reflects the growth seen in passenger kilometres.

- The passenger journeys figures highlight the effect of traffic growth and the corresponding increase in use of the rail system. There are a number of possible factors behind recent increases in rail usage such as the opening of new lines and stations, additional services/trains particularly on London Overground and Chiltern Railways. The increased demand for suburban travel to/from London and season tickets suggest that the driver behind this growth is work-related rather than leisure travel. Further factors could also include the upgraded West Coast Mainline and improved alternative travel methods during engineering works.

- The Regional sector had 85.5 million journeys, a 1.4% increase on the same time last year with the main driver being an increase in season ticket travel in the North West and Scotland.

- The long distance sector had 32.4 million journeys in 2013-14 Q2, a 0.3% decrease on the same quarter last year with the largest fall being in off-peak and other fares. Routes particular affected by this drop are those from London serving South Wales and the West Midlands. The long distance sector has historically been the sector with the weakest growth and this may be understood in terms of competition from coach travel at the low end and air travel at the high end of the travel industry.

- The general picture of increased train journeys would appear to be work-related given that season ticket sales have shown the largest growth over the past two quarters. The increasing economic confidence may be the driver behind this, enabling commuters to make the longer-term commitment of a season ticket for their commute.

- Other possible contributing factors relating to changes in passenger journeys could include the redesign of stations/platforms such as at London Bridge, area regeneration such as Stratford station for the 2012 Olympics, improvements to station facilities including car parking, wi-fi and bicycle storage - the latter two seen at Greater Anglia stations, changes in the economic environment in a given area, the occurrence of (special) events and improved links to other transport modes, such as airports, as seen with Southend Airport station.

Passenger journeys data are presented here: [Data Portal]

A list of pre-created passenger journeys tables available on the data portal is presented in Annex 2.

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4. Passenger Revenue

About Passenger Revenue

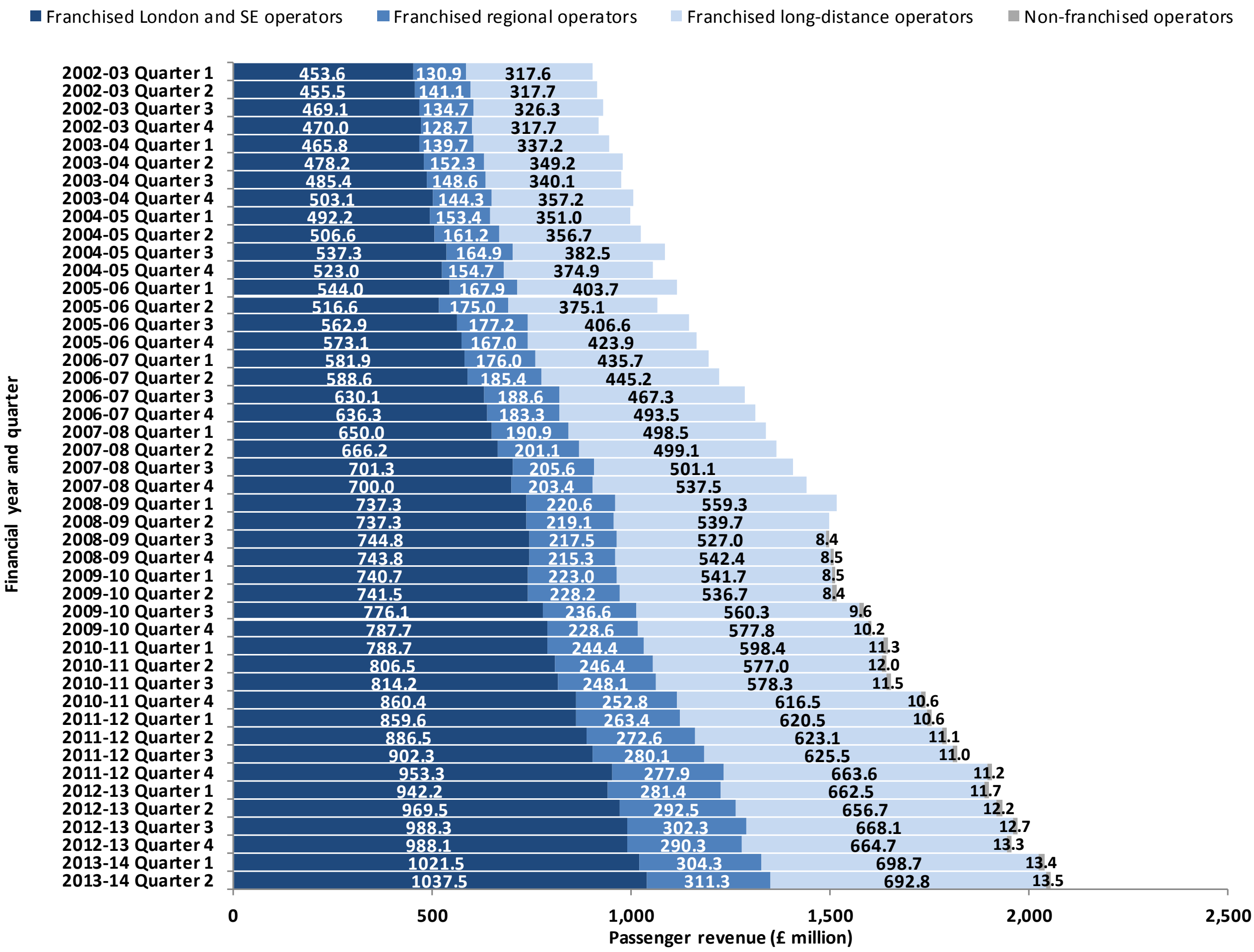
These data show all ticket revenue and miscellaneous charges associated with passenger travel on national railways, but not including government support or grants. The data used to derive passenger revenue are sourced from the LENNON database.

4.1 Passenger revenue by sector

2013-14 Quarter 2 Results

Passenger revenue by sector – chart

Great Britain data 2002-03 Q2 to 2013-14 Q2



- In 2013-14 Q2, total franchised passenger revenue was £2.04 billion, a 6.4% increase on 2012-13 Q2 and given the increased volume of passenger kilometres and journeys, this is to be expected. This is the highest amount of revenue generated within any quarter since the time series began. Non-franchised passenger revenue rose to a record high of £13.5 million in 2013-14 Q2; a 10.2% increase compared to the same quarter last year. The largest increase in revenue (10.3) was for advance purchase tickets, reflecting the increased number of journeys for those products; the second largest increase was for season tickets with a growth rate of 8.4%, reflected work-related economic growth. Revenue has increased across all ticket types by between 5.5% and 10.2%, a slightly slower rate of growth from the previous quarter. Across all sectors, growth was strongest in the Advanced Ticket type – this might be expected in summer holiday months.

- The percentage increase in revenue for non-franchised operators is slightly lower than the growth in non-franchised kilometres and journeys, suggesting that passengers are taking advantage of cheaper fares, for example special offers or advance purchase tickets or travelling more frequently for shorter distances.

- During 2013-14 Q2 regional franchised operators generated £311.3 million, a 6.4% increase on the same quarter last year. This is the highest amount of revenue generated in a quarter by franchised regional operators since the time series began. Season ticket revenue growth was strong in this sector (9.7%), (second only to Advanced ticket sales with 11.8% growth), suggesting an increase in intra-urban commuting outside of London.

- Franchised passenger revenue for long distance services increased by 5.5% on 2012-13 Q2 to reach £692.8 million despite a fall in the number of passenger journeys and passenger kilometres. This is the second highest amount of revenue generated by franchised long distance operators within a quarter since the time series began.

- Revenue for franchised operators within London and South East increased by 7.0% during 2013-14 Q2 when compared to the same quarter last year, with revenue of £1.0 billion. This is the highest amount of revenue generated within a single quarter by franchised London and South East operators since the time series began. There is evidence of continuing strong growth in advance (22.0%) and season (8.6%) ticket sales in this sector. Promotional advance fares like those introduced by Greater Anglia and Southern may have contributed to this increase, encouraging more people to travel. Furthermore, the re-generation and promotion of areas such as Stratford and the opening of Westfield shopping centre may have also contributed to the London and South East sector increase.

Passenger revenue data are presented here: Data Portal

A list of pre-created passenger revenue tables available on the data portal is presented in Annex 2.

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Annex 1 – Statistical release themes and publication timetable

Statistical release	Data	Publication schedule
Passenger & Freight Rail Performance - Quarterly	Public performance measure Freight performance measure Cancellations and significant lateness	Q1: 5th September 2013 Q2: 14th November 2013 Q3: 6th February 2014 Q4: 8th May 2014
Passenger Rail Usage – Quarterly	Passenger kilometres Passenger journeys Passenger revenue Timetabled train kilometres	Q1: 19th September 2013 Q2: 28th November 2013 Q3: 20th February 2014 Q4: 22nd May 2014
Freight Rail Usage - Quarterly	Freight moved Freight lifted Freight delay minutes per 100 train kilometres Freight market indicators (Q4 only)	Q1: 3rd October 2013 Q2: 12th December 2013 Q3: 6th March 2014 Q4: 5th June 2014
Passenger Rail Service Satisfaction - Quarterly	Complaints Complaints comments received by London TravelWatch and Passenger Focus National rail enquiries	Q1: 17th October 2013 Q2: 19th December 2013 Q3: 20th March 2014 Q4: 19th June 2014
Regional Usage - Annual	Regional usage profiles	August 2014
Key Safety Statistics - Annual	Key safety facts Passenger key safety facts Public key safety facts Workforce key safety facts Train accident facts	August 2014
Rail Finance - Annual	Government support to the rail industry Rail fares index Private investment Subsidy	August 2014

Rail Infrastructure, Assets and Environmental - Annual	Infrastructure on the railways Average age of rolling stock Sustainable development	August 2014

Annex 2 – List of pre-created performance reports available on ORR Data Portal

Timetabled Train Kilometres

- Timetabled Train Kilometres by train operating company and quarter – table Data Portal

Passenger Kilometres

- Passenger Kilometres by sector – table Data Portal
- Passenger Kilometres by ticket type– table Data Portal

Passenger Journeys

- Passenger Journeys by sector– table Data Portal
- Passenger Journeys by ticket type– table Data Portal

Passenger Revenue

- Passenger Revenue by sector – table Data Portal
- Passenger Revenue by ticket type – table Data Portal; and
- Revenue per passenger kilometre and per passenger journey – table Data Portal