

APPENDIX C

**Research report**

**Regional commuter fares  
and ticketing comparisons  
in Great Britain**

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# Regional commuter fares and ticketing comparisons in Great Britain

Report

**January 2009**

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# 1 Introduction and Methodology

## Introduction

- 1.1 This paper sets out our analysis of rail commuter travel across Scotland, Wales and the nine government office regions of England.

## Selection of study stations

- 1.2 In this study we consider rail commuting to the largest city in Scotland, Wales and each government office region. The study stations for each region are detailed in the table below. In the case of the East of England Norwich is the largest city, but Cambridge was decided to be a more suitable location to compare rail commuting.

**TABLE 1.1 STUDY STATIONS BY GOVERNMENT OFFICE REGION**

Government Office Region	Chosen City
East of England	Cambridge
East Midlands	Nottingham
London	London
North East	Newcastle upon Tyne
North West	Manchester
South East	Brighton
South West	Bristol
West Midlands	Birmingham
Yorkshire and Humber	Leeds
Scotland	Glasgow
Wales	Cardiff

- 1.3 For each government office region we have chosen five origin stations in three distance bands from the study stations shown above: 5-16km (short), 17-40km (medium) and 41-80km (longer). In Appendix A we list the origin stations for the study. The stations chosen are those with the greatest rail patronage based on entries and exits data from ORR 2006/7. We have excluded locations which are not served by a direct service between the two locations.

## Average trip distance

- 1.4 One consequence of using sample journeys and fares was that the average journey distance for each type of journey we examined varied between regions. To allow comparison with fares between regions we calculated, from the fares data collected, the fare which would apply in each region at a standardised distance. Average trip distances used are shown in the table below.

**TABLE 1.2 AVERAGE TRIP DISTANCE BY TRIP TYPE**

Trip type	Trip length band	Average trip length
Commuter short distance	5-16km	12km
Commuter medium distance	17-40km	33km
Commuter longer distance	41-80km	66km

## Disposable income

- 1.5 We agreed with Passenger Focus to adjust fares for regional differences in real disposable income compared with the average for the United Kingdom. We used 2006 data on real disposable income (source Office for National Statistics: 2006 is the latest available data). These adjustments are summarised in the table which follows.

**TABLE 1.3 CORRECTIONS FOR DISPOSABLE INCOME USED IN THIS REPORT**

Government Office Region	Fare corrections for disposable income
East of England	-5.4%
East Midlands	+7.4%
London	-18.5%
North East	+16.5%
North West	+9.1%
South East	-10.2%
South West	+0.9%
West Midlands	+10.0%
Yorkshire and Humber	+10.4%
Scotland	+5.6%
Wales	+12.1%

## Data collection

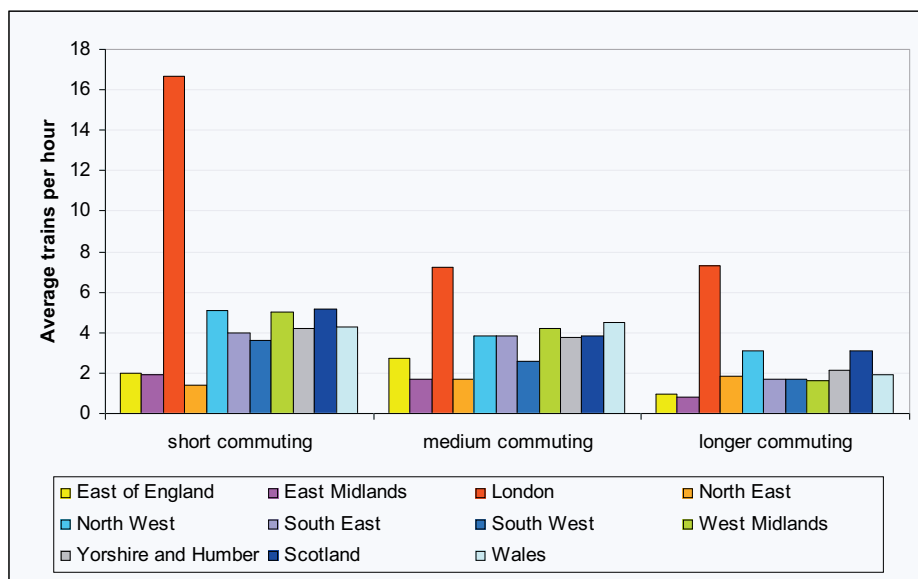
- 1.6 Our analysis is based on data collated in Autumn 2008. Current service frequencies and fares may differ.
- 1.7 Fares are based on National Rail fares, with the exception of season tickets in the West Midlands. National Rail season ticket fares are not available for trips entirely within the West Midlands; instead a range of regional “Otrain” zonal season tickets is available.
- 1.8 We have analysed fares to only the largest city in each government office area. Fares to other towns/cities within a particular region may differ.

## 2 Executive Overview

### Trains per hour

- 2.1 London has significantly more frequent services than all other regions in Great Britain for all commuting distances. London also has amongst the earliest services arriving in the morning and the latest services departing in the evening. The East of England, the East Midlands and the North East typically have fewer trains per hour than other regions. Commuter trains in these regions also generally have a more limited service with train services starting later in the morning and finishing earlier in the evening than in other regions.

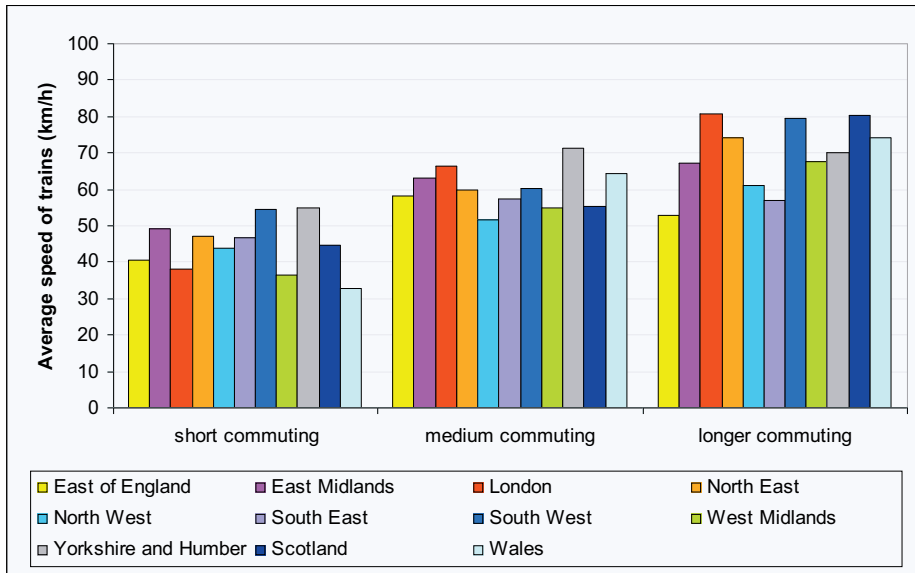
**FIGURE 2.1 AVERAGE TRAINS PER HOUR – AM PEAK**



## Average speed

- 2.2 The average speed of services is determined by distance travelled in most regions. Longer distance services have higher average speeds due to less frequent stopping patterns and often, faster rolling stock. The speed of trains is less variable across the regions than service frequency.

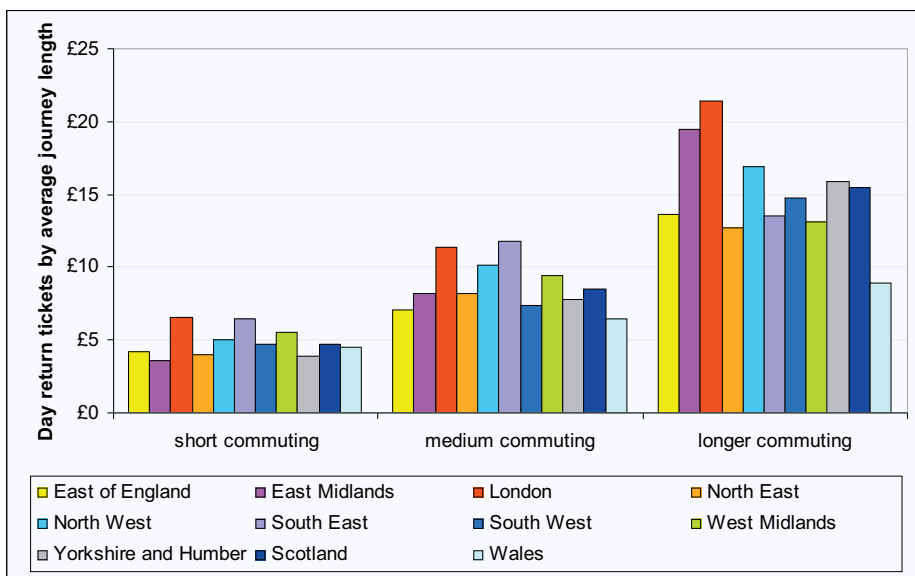
**FIGURE 2.2 AVERAGE SPEED OF TRAINS – AM PEAK**



## Fares

- 2.3 For unrestricted fares, short and medium distance commuter fares to London and in the South East are more expensive than other regions. For longer distance journeys fares in the South East are lower, but travel to London is the most expensive.

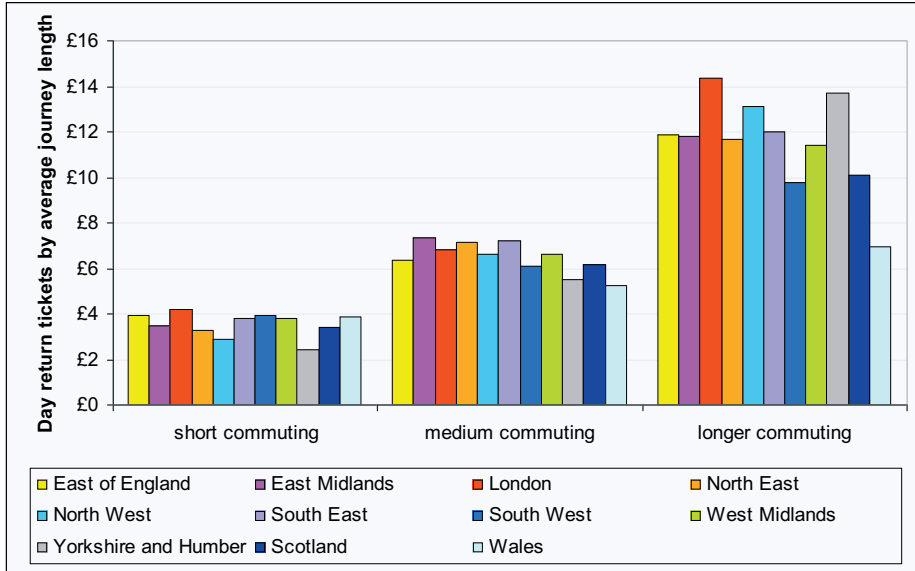
**FIGURE 2.3 AVERAGE UNRESTRICTED RETURN FARES**





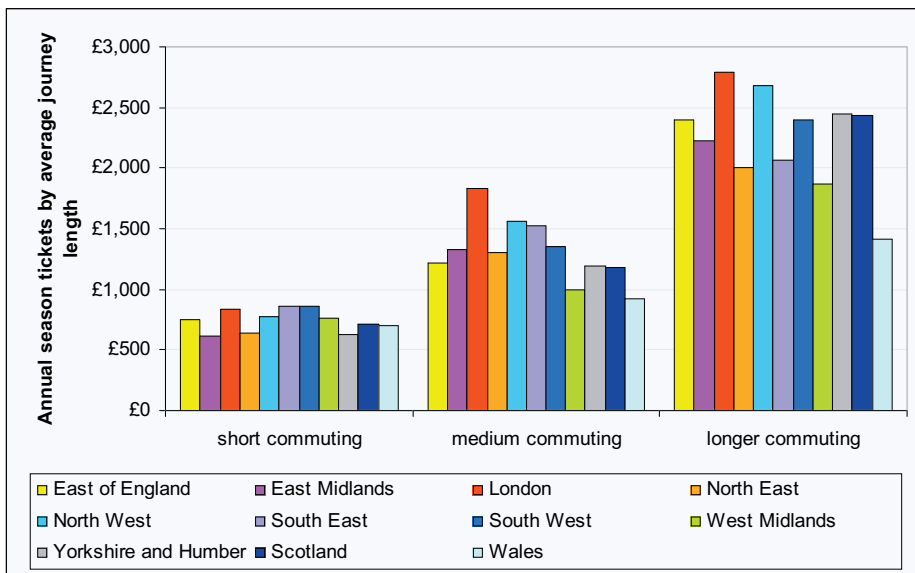
- 2.4 Restricted fares (arriving at the destination between 1000 and 1200) in London are broadly comparable to other regions for short and medium commuting distances. Restricted fares for longer distance commuting are most expensive in London.

**FIGURE 2.4 AVERAGE RESTRICTED RETURN FARES**



- 2.5 Season ticket prices in Wales are consistently among the cheapest compared to other regions for seven day, monthly and annual options. Season tickets for travel to London are the most expensive for all season ticket lengths for longer distance and medium distance commuting bands. The second most expensive region in which to commute for medium and longer distances is the South East. For reference we have included a table detailing season ticket fares in Appendix B.

**FIGURE 2.5 AVERAGE ANNUAL SEASON TICKET FARES**



## 3 Summary of findings

- 3.1 In the following section we present a summary of the findings from our research and analysis. The relevant graphs for each section in the accompanying document are noted in brackets, for example the graph in figure 1.2 is referenced as (1.2).

### **Trains per hour**

- 3.2 Commuter services to London benefit from considerably more trains per hour than other regions for all three distance bands (1.1, 1.2, 1.3). In other regions services with four trains per hour (tph) or more represent a good service frequency. For short and medium commuting distances regions with particularly low numbers of trains per hour include the East of England, the East Midlands and the North East. For longer distance commuting most regions offer only up to two trains per hour. Regions with higher frequency services include London (up to 7 tph) the North West and Scotland (both 3 tph). Within each region service frequency patterns do not generally vary considerably between the AM peak, inter-peak and PM peak periods.

### **Average speed**

- 3.3 Compared with the variations in service frequency by region, average speed of journeys is less variable across the country (1.4, 1.5, 1.6). In most regions average speed increases as journey distance increases, reflecting faster services with less frequent calling points.

### **Fares**

#### ***Unrestricted return***

- 3.4 Unrestricted commuter return fares (1.7), adjusted for distance and for disposable income, vary most in the longer distance band, from £9.11 in Wales (41% less than average) to £21.84 for travel to London (42% more than average). Regions where fares are lower than average for all distance bands include the East of England, the North East and Wales. Fares to London are consistently more expensive than other regions for all distance bands, although short and medium fares to the South East are similarly expensive.

#### ***Restricted return (arrival between 1000 and 1200)***

- 3.5 Overall, restricted fares to London are comparable with other locations, although longer distance commuter fares to London are still the most expensive. Unrestricted fares for longer distance journeys in Wales are notably cheaper than other regions (1.8).

### **Season tickets**

#### ***Seven days***


- 3.6 Seven day season tickets in Wales are generally cheaper than other regions, particularly in the medium and longer distance commuter bands (respectively 30%

and 37% less than average) (1.9). Seven day season ticket fares vary least in the short distance commuter band. In the medium and longer distance commuter bands fares to London are more expensive than in other regions.

#### ***Monthly***

- 3.7 Monthly fares to the West Midlands and Wales are notably cheaper than in most other regions for medium and longer distance commuting (between 17% and 37% less than average). Monthly fares for medium and longer commuter distance bands are most expensive to London (1.10).

#### ***Annual***

- 3.8 There is greatest variation in the cost of annual season tickets in the longer distance commuter band. Fares range from £1,414 for travel to Wales to £2,793 for travel to London. Annual season tickets to London are consistently high compared with other regions. Lower annual fares for medium distance commuting are available in the West Midlands because of the “train” season tickets (1.11).

### **First train and last train**

#### ***Short distance***

- 3.9 For short distance commuter bands, services to London have both the earliest services arriving in the morning and the latest services departing in the evening (2.5). Wales, the East of England and the South East have a number of early morning services, with services for some routes with services arriving as early as 0535. In the North East services begin later in the morning and finish earlier in the evening compared with most other regions.

#### ***Medium distance***

- 3.10 As is the case with the short distance commuter band, London has both the earliest services arriving in the morning (before 0500) and the latest services departing in the evening (past midnight) (2.6). Services in the North East and the East Midlands begin later in the morning and finish earlier in the evening (as early as 2030) in comparison with most other regions.

#### ***Longer distance***

- 3.11 There is greatest variation in train operation times for services within the longer distance commuting band. London and Wales have the earliest services arriving in the morning with some arriving before 0500 and the latest services departing in the evening with some departing as late as 0130 (2.7). Services in the North East and the East Midlands have amongst the shortest operating day.

**TABLE A1 COMMUTER STATIONS BY COUNTRY AND DISTANCE BAND**

Government Office Region chosen city	Distance Band	Stations
East of England, Cambridge	Short commuter	Whittlesford Parkway, Waterbeach, Meldreth, Shelford, Great Chesterford
	Medium commuter	Stevenage, Hitchin, Bishops Stortford, Ely, Audley End
	Longer commuter	Peterborough, Ipswich, Welwyn Garden City, Harlow Town, Hatfield
East Midlands, Nottingham	Short commuter	Long Eaton, Beeston, Hucknall, Langley Mill, Bulwell
	Medium commuter	Leicester, Derby, Loughborough, Chesterfield, Grantham
	Longer commuter	Lincoln Central, Kettering, Market Harborough, Sleaford, Boston
London, London	Short commuter	East Croydon, Clapham Junction, Wimbledon, Stratford, Putney
	Medium commuter	Woking, Slough, Watford Junction, Maidenhead, Epsom
	Longer commuter	Reading, Guildford, Chelmsford, Basingstoke, Southend Victoria
North East, Newcastle upon Tyne	Short commuter	Chester-Le-Street, Prudhoe, Wylam, Cramlington, Blaydon
	Medium commuter	Durham, Hexham, Sunderland, Morpeth, Seaham
	Longer commuter	Darlington, Middlesbrough, Thornaby, Alnmouth, Hartlepool
North West, Manchester	Short commuter	Stockport, Stalybridge, Rochdale, Wilmslow, Cheadle Hulme
	Medium commuter	Bolton, Wigan Wallgate, Macclesfield, Blackburn, Warrington Central
	Longer commuter	Liverpool Lime Street, Preston, Chester, Crewe, Blackpool North
South East, Brighton	Short commuter	Burgess Hill, Shoreham-by-Sea, Falmer, Hassocks, Lancing

Government Office Region chosen city	Distance Band	Stations
	Medium commuter	Haywards Heath, Eastbourne, Worthing, Three Bridges, Barnham
	Longer commuter	Redhill, Chichester, Portsmouth and Southsea, Havant, Hastings
South West, Bristol	Short commuter	Bath Spa, Filton Abbeywood, Nailsea and Backwell, Keynsham, Yate
	Medium commuter	Chippenham, Weston-super-Mare, Trowbridge, Westbury Wiltshire, Warminster
	Longer commuter	Swindon, Salisbury, Cheltenham Spa, Taunton, Gloucester
West Midlands, Birmingham	Short commuter	Solihull, Walsall, Sutton Coldfield, Kings Norton, Bournville
	Medium commuter	Coventry, Wolverhampton, Leamington Spa, Worcester Foregate Street, Stafford
	Longer commuter	Stoke-on-Trent, Shrewsbury, Rugby, Hereford, Telford Central
Yorkshire and Humber, Leeds	Short commuter	Wakefield Westgate, Bradford Interchange, Shipley, Dewsbury, Guiseley
	Medium commuter	York, Huddersfield, Keighley, Harrogate, Halifax
	Longer commuter	Sheffield, Doncaster, Hull, Meadowhall, Northallerton
Scotland, Glasgow	Short commuter	Paisley Gilmour Street, Johnstone, Anniesland, Lenzie, East Kilbride
	Medium commuter	Stirling, Motherwell, Airdrie, Croy, Helensburgh Central
	Longer commuter	Edinburgh Waverley, Ayr, Linlithgow, Kilwinning, Perth
Wales, Cardiff	Short commuter	Caerphilly, Barry Island, Barry, Radyr, Taffs Well
	Medium commuter	Newport S. Wales, Bridgend, Pontypridd, Trefforest, Treherbert
	Longer commuter	Llanelli, Llansamlet, Neath, Pembrey and Burry Port, Port Talbot Parkway

**TABLE B1 AVERAGE ANNUAL SEASON TICKET PRICES**

<b>Government Office Region</b>	<b>Short distance commuting</b>	<b>Medium distance commuting</b>	<b>Longer distance commuting</b>
East of England	£744	£1,221	£2,397
East Midlands	£621	£1,323	£2,228
London	£831	£1,831	£2,793
North East	£636	£1,299	£2,004
North West	£777	£1,566	£2,675
South East	£866	£1,521	£2,066
South West	£859	£1,355	£2,400
West Midlands	£468	£832	£1,863
Yorkshire and Humber	£629	£1,190	£2,447
Scotland	£715	£1,181	£2,439
Wales	£696	£920	£1,414
<b>GB Average</b>	<b>£740</b>	<b>£1,346</b>	<b>£2,206</b>

Please note that this data is the average price for the five journeys analysed in each distance band for each government office region, standardised for journey distance and adjusted to reflect relative disposable income in the region concerned.

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