

Introduction

This is the twelfth edition of 'National Rail Trends'. It is a quarterly publication that brings together a wide range of information on the rail industry. It is organised into sections covering:-

- Rail usage
- Rail performance
- Fares
- Freight
- Government support, investment, infrastructure and rolling stock

The data are quarterly or annual. Each edition contains the latest version of each table for easy reference, even if they remain unchanged from the previous publication. The data should always be used in conjunction with the notes and definitions.

This edition of National Rail Trends includes a new section. Section 4.3 includes a set of Key Performance Indicators for rail freight. These have been developed to better illustrate the performance of rail freight in Great

Britain. This section will be updated annually in the Q4 editions of National Rail Trends.

None of the data provided in National Rail Trends could be presented without the close co-operation of the companies in the rail sector. This co-operation, as well as that received from Network Rail and the DfT, is gratefully acknowledged.

Additional data and analyses will be included as they become available.

September 2003

Quarter dates

Q1 – April, May and June

Q2 – July, August and September

Q3 – October, November and December

Q4 – January, February and March

Revisions

Data for the current financial year are provisional in the first three editions of National Rail Trends each year. At the end of each financial year a reconciliation exercise with the Train Operating Companies (TOCs) takes place and data will then be finalised in the Quarter Four (January to March) edition of the publication. This may also affect previous years' data, especially the seasonally adjusted series for which the seasonal factors are revised annually.

Contacts

Media enquiries

SRA Press Office:

020 7654 6339 / 6387 / 6862 / 6294

Content/presentation enquiries

National Rail Trends Team:

Paul Gaught: 020 7654 6072

Malcolm Knight 020 7654 6110

Previous editions and further SRA releases

are available on the SRA website:

www.sra.gov.uk

Contents

Introduction

1. Rail usage	2
1.1 Passenger kilometres	3
1.2 Passenger journeys	6
1.3 Passenger revenue	9
1.4 Timetabled train kilometres	11
2. Rail performance	13
2.1 Public performance measure	14
2.2 Rail complaints	17
2.3 National Rail Enquiry Scheme	19
3. Fares	21
3.1 Fares price index	22
4. Freight	24
4.1 Freight moved	25
4.2 Freight lifted	28
4.3 Freight key performance indicators	30
5. Miscellaneous tables	32
5.1 Government support	33
5.2 Investment	35
5.3 Infrastructure on National Railways	37
5.4 Average age of rolling stock	39
Appendix	40

1. Rail usage

Key Results

The latest results are for April to June 2003

- Between 2003-04 Q1 and 2002-03 Q1 passenger kilometres increased by two per cent.
- Between 2003-04 Q1 and 2002-03 Q1 passenger journeys increased by one per cent.
- Between 2003-04 Q1 and 2002-03 Q1 passenger revenue at 1999-00 prices increased by two per cent.
- Between 2003-04 Q1 and 2002-03 Q1 the London and South East sector showed the smallest percentage growth in all three measures of passenger usage. Regional operators showed the greatest increase in passenger kilometres and passenger revenue.
- Between 2003-04 Q1 and 2002-03 Q1 all three measures of passenger usage showed a decrease in use of season tickets but an increase in use of ordinary tickets.

Methodology for Passenger Journeys and Kilometres data

The rail industry's central ticketing system, CAPRI, is the basis for passenger kilometres and journeys data. However, CAPRI is unable to correctly record sales of certain products, including some operator-specific tickets and PTE multi-modal tickets. The SRA undertook a review of these, specifically the passenger journeys and kilometres associated with them. With the significant assistance of Train Operating Companies (TOCs) we are able to include a robust

estimate of these products in our passenger usage tables backdated to the beginning of 1999-00. Passenger revenue data are unaffected by these adjustments.

These figures are significant for a small number of TOCs. At the level of aggregation published in National Rail Trends the differences are minor. For more information on these adjustments please refer to National Rail Trends 2001-02 Quarter One edition.

1.1 Passenger kilometres

Table 1.1a Passenger kilometres by ticket type (billions)
Great Britain 1986-87 to 2003-04

		Ordinary fares	Season tickets	Total passenger kilometres	Total passenger kilometres seasonally adjusted
1986-87		22.0	8.8	30.8	30.8
1987-88		23.0	9.4	32.4	32.4
1988-89		23.2	11.1	34.3	34.3
1989-90		22.4	10.9	33.3	33.3
1990-91		22.8	10.4	33.2	33.2
1991-92		22.4	10.0	32.5	32.5
1992-93		22.3	9.4	31.7	31.7
1993-94		21.3	9.0	30.4	30.4
1994-95		20.7	8.0	28.7	28.7
1995-96		22.2	7.9	30.0	30.0
1996-97		23.4	8.7	32.1	32.1
1997-98		25.3	9.3	34.7	34.7
1998-99		26.4	9.8	36.3	36.3
1999-00		28.0	10.4	38.5	38.5
2000-01		27.2	10.9	38.2	38.2
2001-02		28.1	11.0	39.1	39.1
2002-03		28.4	11.3	39.7	39.7
1998-99	Q1	6.5	2.2	8.7	8.7
	Q2	6.9	2.2	9.1	9.0
	Q3	6.7	2.7	9.4	9.3
	Q4	6.3	2.8	9.0	9.3
1999-00	Q1	6.9	2.4	9.3	9.1
	Q2	7.4	2.4	9.8	9.5
	Q3	7.0	2.8	9.8	9.8
	Q4	6.8	2.9	9.7	10.0
2000-01	Q1	7.4	2.5	9.9	9.8
	Q2	8.1	2.5	10.6	10.2
	Q3	5.9	2.9	8.8	9.0
	Q4	5.9	3.0	8.8	9.1
2001-02	Q1	7.1	2.6	9.7	9.6
	Q2	7.5	2.6	10.1	9.8
	Q3	7.0	2.9	10.0	10.1
	Q4	6.5	2.9	9.4	9.6
2002-03	Q1	7.1	2.8	9.9	9.8
	Q2	7.6	2.6	10.1	9.8
	Q3	7.1	2.9	10.0	10.2
	Q4	6.7	3.0	9.7	9.9
2003-04	Q1	7.3	2.7	10.0	10.1
Percentage change 2003-04 Q1 on 2002-03 Q1		3.0	-1.4	1.8	3.0

Notes
For more details on the break in the series please refer to notes on page 2

1. Rail usage continued

Table 1.1b Passenger kilometres by sector (billions)
Great Britain 1994-95 to 2003-04

		Long distance operators	London and SE operators	Regional operators	All operators
1994-95		10.1	12.9	5.7	28.7
1995-96		10.5	13.3	6.2	30.0
1996-97		11.0	14.6	6.6	32.1
1997-98		12.3	15.5	6.8	34.7
1998-99		12.6	16.5	7.2	36.3
1999-00		13.2	17.7	7.6	38.5
2000-01		12.1	18.4	7.6	38.2
2001-02		12.9	18.5	7.7	39.1
2002-03		12.9	19.0	7.8	39.7
1996-97	Q1	2.7	3.5	1.6	7.8
	Q2	2.8	3.6	1.7	8.1
	Q3	2.8	3.8	1.7	8.3
	Q4	2.7	3.7	1.6	8.0
1997-98	Q1	3.0	3.7	1.6	8.3
	Q2	3.2	3.8	1.8	8.8
	Q3	3.1	4.0	1.8	9.0
	Q4	3.0	4.0	1.6	8.6
1998-99	Q1	3.1	3.9	1.8	8.7
	Q2	3.3	4.0	1.9	9.1
	Q3	3.2	4.3	1.8	9.4
	Q4	3.1	4.3	1.7	9.0
1999-00	Q1	3.2	4.2	1.8	9.3
	Q2	3.4	4.3	2.0	9.8
	Q3	3.3	4.6	1.9	9.8
	Q4	3.3	4.6	1.8	9.7
2000-01	Q1	3.5	4.5	2.0	9.9
	Q2	3.7	4.8	2.2	10.6
	Q3	2.4	4.6	1.8	8.8
	Q4	2.6	4.6	1.7	8.8
2001-02	Q1	3.3	4.6	1.9	9.7
	Q2	3.4	4.6	2.1	10.1
	Q3	3.2	4.8	2.0	10.0
	Q4	3.1	4.5	1.8	9.4
2002-03	Q1	3.3	4.7	1.9	9.9
	Q2	3.3	4.7	2.1	10.1
	Q3	3.2	4.8	2.0	10.0
	Q4	3.1	4.7	1.8	9.7
2003-04	Q1	3.3	4.7	2.0	10.0
Percentage change 2003-04 Q1 on 2002-03 Q1		2.0	0.3	4.9	1.8

Note
Refer to Appendix, part 3, for details of sector classification. For more details on the break in the series please refer to notes on page 2

Chart 1.1a Passenger kilometres (billions)
Great Britain 1998-99 to 2003-04

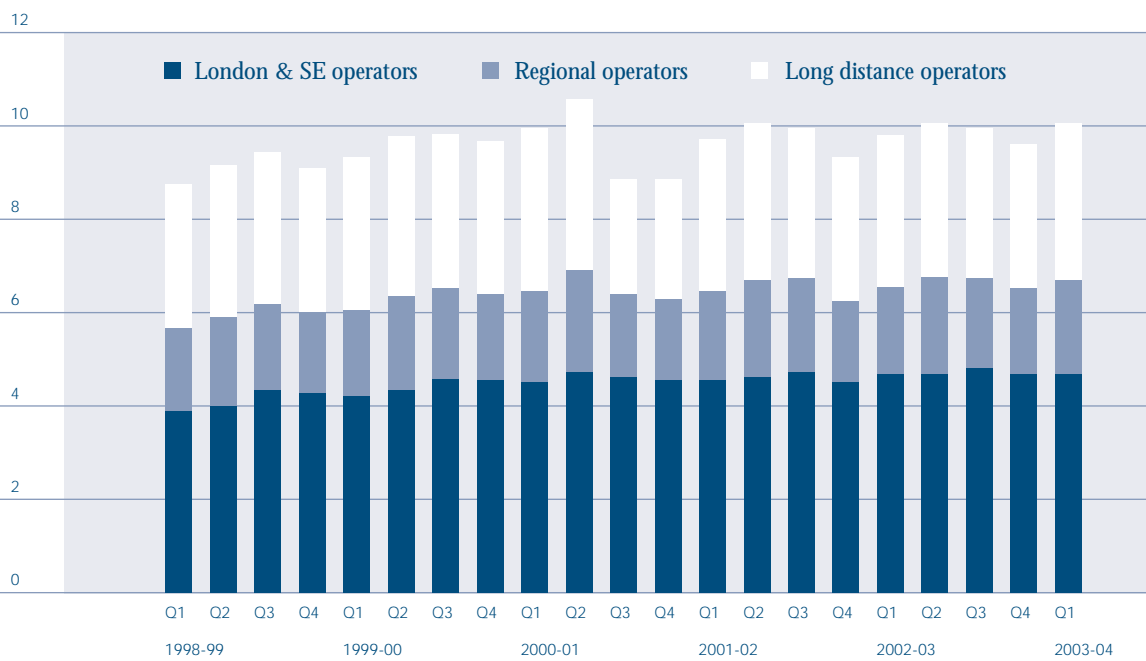
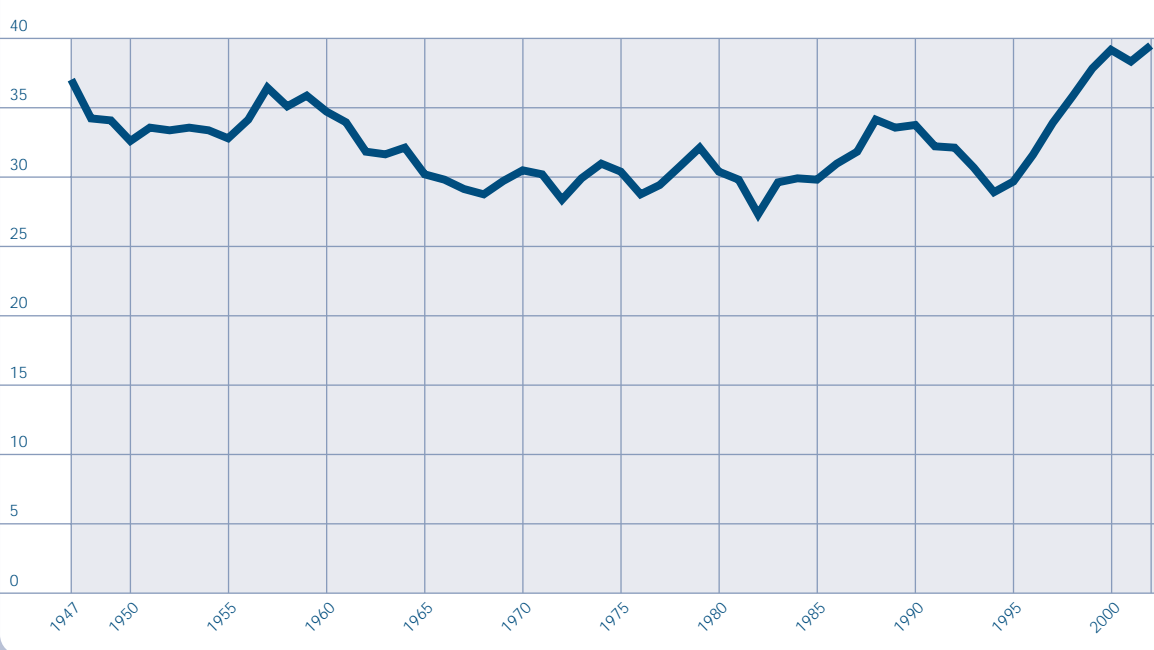


Chart 1.1b Passenger kilometres (billions)
Great Britain 1947 to 2002



1. Rail usage continued

1.2 Passenger journeys

Table 1.2a Passenger journeys by ticket type (millions)
Great Britain 1986-87 to 2003-04

		Ordinary fares	Season tickets	Total passenger journeys	Total passenger journeys seasonally adjusted
1986-87		415	323	738	738
1987-88		434	364	798	798
1988-89		418	404	822	822
1989-90		404	408	812	812
1990-91		411	399	810	810
1991-92		400	392	792	792
1992-93		398	372	770	770
1993-94		385	355	740	740
1994-95		407	328	735	735
1995-96		433	328	761	761
1996-97		459	342	801	801
1997-98		481	365	846	846
1998-99		508	384	892	892
1999-00		540	391	931	931
2000-01		549	407	957	957
2001-02		551	408	960	960
2002-03		561	414	976	976
1998-99	Q1	123	88	211	213
	Q2	131	84	215	221
	Q3	131	107	238	228
	Q4	124	106	229	230
1999-00	Q1	131	91	222	222
	Q2	140	89	229	232
	Q3	137	104	242	235
	Q4	132	107	238	241
2000-01	Q1	140	95	235	238
	Q2	152	95	247	247
	Q3	131	108	240	236
	Q4	126	109	235	235
2001-02	Q1	138	98	236	239
	Q2	145	95	240	242
	Q3	141	110	252	246
	Q4	127	105	232	233
2002-03	Q1	137	101	239	242
	Q2	147	94	241	243
	Q3	143	108	251	248
	Q4	134	111	245	243
2003-04	Q1	142	100	242	249
Percentage change 2003-04 Q1 on 2002-03 Q1		3.2	-1.2	1.3	2.8

Note
For more details on the break in the series please refer to notes on page 2

Passenger journeys figures include an element of double counting, as a journey involving more than one operator is scored against each operator. This

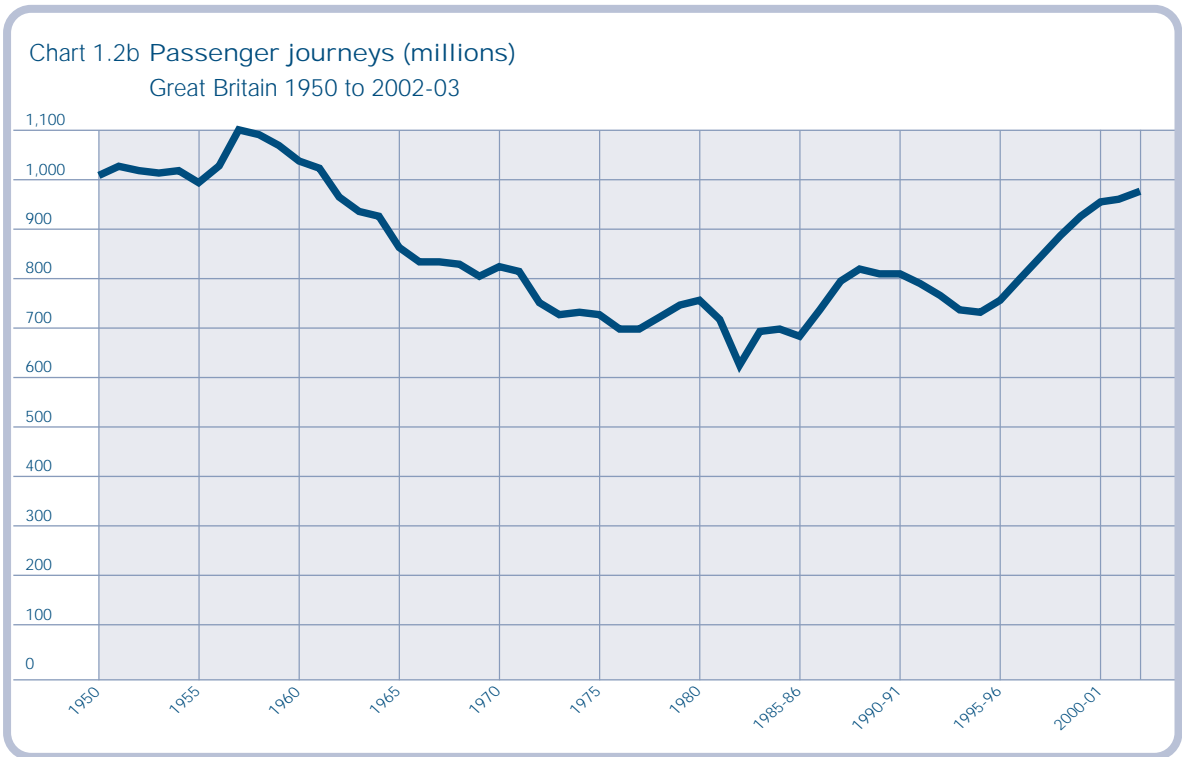
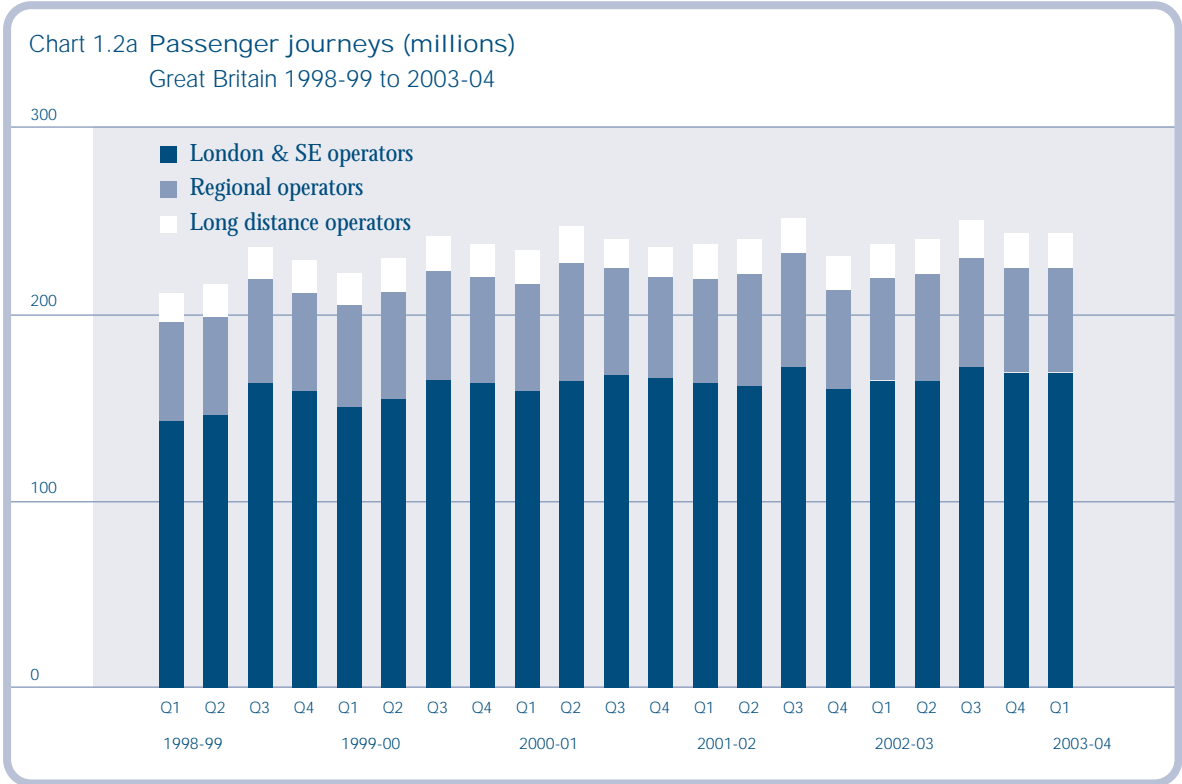
contrasts with results previously published for British Rail, for which some through-ticketed journeys were counted only once, irrespective of any changes made.

Table 1.2b Passenger journeys by sector (millions)
Great Britain 1994-95 to 2003-04

		Long distance operators	London and SE operators	Regional operators	All operators
1994-95		54	502	179	735
1995-96		56	516	189	761
1996-97		59	542	200	801
1997-98		64	576	206	846
1998-99		67	610	215	892
1999-00		72	631	228	931
2000-01		70	656	231	957
2001-02		74	655	231	960
2002-03		77	670	229	976
1996-97	Q1	14	130	48	192
	Q2	14	130	50	194
	Q3	15	144	53	212
	Q4	15	138	49	202
1997-98	Q1	15	136	49	200
	Q2	16	138	52	206
	Q3	17	152	55	224
	Q4	16	149	51	216
1998-99	Q1	16	142	53	211
	Q2	17	145	52	215
	Q3	18	164	56	238
	Q4	17	159	54	229
1999-00	Q1	17	150	54	222
	Q2	18	154	57	229
	Q3	18	164	59	242
	Q4	18	163	57	238
2000-01	Q1	19	159	57	235
	Q2	20	165	62	247
	Q3	15	167	57	240
	Q4	16	165	54	235
2001-02	Q1	18	162	56	236
	Q2	19	162	60	240
	Q3	19	171	62	252
	Q4	18	160	54	232
2002-03	Q1	19	164	55	239
	Q2	19	164	58	241
	Q3	20	172	59	251
	Q4	19	169	56	245
2003-04	Q1	20	165	57	242
Percentage change 2003-04 Q1 on 2002-03 Q1		5.9	0.0	3.7	1.3

Note
Refer to Appendix, part 3, for details of sector classification. For more details on the break in the series please refer to notes on page 2

1. Rail usage continued



1.3 Passenger revenue

Table 1.3a Passenger revenue by ticket type (£ millions)
Great Britain 1986-87 to 2003-04

		Ordinary fares	Season tickets	Total passenger revenue	Total passenger revenue seasonally adjusted	Total revenue seasonally adjusted 1999-00 prices
1986-87		1,047	395	1,443	1,443	2,462
1987-88		1,168	454	1,622	1,622	2,628
1988-89		1,291	512	1,803	1,803	2,737
1989-90		1,357	550	1,907	1,907	2,699
1990-91		1,483	574	2,057	2,057	2,701
1991-92		1,514	603	2,117	2,117	2,618
1992-93		1,551	603	2,154	2,154	2,580
1993-94		1,577	616	2,193	2,193	2,559
1994-95		1,559	611	2,171	2,171	2,498
1995-96		1,720	660	2,379	2,379	2,661
1996-97		1,870	702	2,573	2,573	2,788
1997-98		2,048	773	2,821	2,821	2,973
1998-99		2,242	847	3,089	3,089	3,162
1999-00		2,463	905	3,368	3,368	3,368
2000-01		2,463	950	3,413	3,413	3,338
2001-02		2,591	957	3,548	3,548	3,385
2002-03		2,693	970	3,663	3,663	3,389
1998-99	Q1	541	191	732	730	755
	Q2	570	190	760	760	780
	Q3	582	230	812	793	808
	Q4	548	236	784	805	818
1999-00	Q1	595	210	806	793	799
	Q2	624	207	831	823	824
	Q3	634	239	873	863	861
	Q4	610	249	858	889	884
2000-01	Q1	660	221	880	878	864
	Q2	717	222	939	912	894
	Q3	552	251	803	817	798
	Q4	535	257	792	806	781
2001-02	Q1	635	232	867	854	823
	Q2	679	224	903	883	851
	Q3	662	256	918	924	877
	Q4	614	246	860	888	834
2002-03	Q1	664	237	902	900	842
	Q2	692	222	915	900	839
	Q3	681	250	931	940	867
	Q4	656	260	916	922	842
2003-04	Q1	708	233	941	947	862
Percentage change 2003-04 Q1 on 2002-03 Q1		6.6	-1.8	4.4	5.2	2.4

1. Rail usage continued

Passenger revenue includes all ticket revenue and miscellaneous charges associated with passenger travel on national railways e.g. car park charges. For tickets

involving travel on London Transport receipts have been apportioned. Passenger revenue does not include government support or grants.

Table 1.3b Passenger revenue by sector (£ millions)
Great Britain 1994-95 to 2003-04

		Long distance operators	London and SE operators	Regional operators	All operators
1994-95		734	1,059	378	2,171
1995-96		795	1,160	425	2,379
1996-97		859	1,257	456	2,573
1997-98		956	1,378	487	2,821
1998-99		1,052	1,513	523	3,089
1999-00		1,160	1,647	560	3,368
2000-01		1,109	1,732	572	3,413
2001-02		1,220	1,739	590	3,548
2002-03		1,279	1,787	596	3,663
1996-97	Q1	210	300	110	620
	Q2	214	305	119	638
	Q3	223	328	118	668
	Q4	213	324	109	646
1997-98	Q1	227	326	116	669
	Q2	241	332	127	700
	Q3	253	359	126	738
	Q4	235	362	117	715
1998-99	Q1	253	353	126	732
	Q2	260	364	136	760
	Q3	276	401	135	812
	Q4	262	396	126	784
1999-00	Q1	280	390	136	806
	Q2	286	400	145	831
	Q3	302	428	143	873
	Q4	293	429	137	858
2000-01	Q1	313	423	145	880
	Q2	332	444	163	939
	Q3	238	430	135	803
	Q4	227	435	130	792
2001-02	Q1	293	429	145	867
	Q2	311	436	157	903
	Q3	318	447	153	918
	Q4	298	427	135	860
2002-03	Q1	317	439	146	902
	Q2	318	440	156	915
	Q3	327	454	150	931
	Q4	317	455	144	916
2003-04	Q1	337	449	155	941
Percentage change 2003-04 Q1 on 2002-03 Q1		6.3	2.3	6.6	4.4

Note
Refer to Appendix, part 3, for details of sector classification

1.4 Timetabled train kilometres

Background

Measures of train kilometres are used by the rail industry to show the volume of service provision.

Methodology

Data are collected automatically from the two different timetables each year (summer and winter) and then allocated into quarters and financial years. The allocation allows for the different weekday, Saturday and Sunday timetables, however it does not allow for changes to the timetable for bank holidays etc.

The data do not include kilometres associated with bus links that are stated in the timetable, but do include kilometres where buses replace trains due to engineering works etc. The data do not allow for emergency timetables.

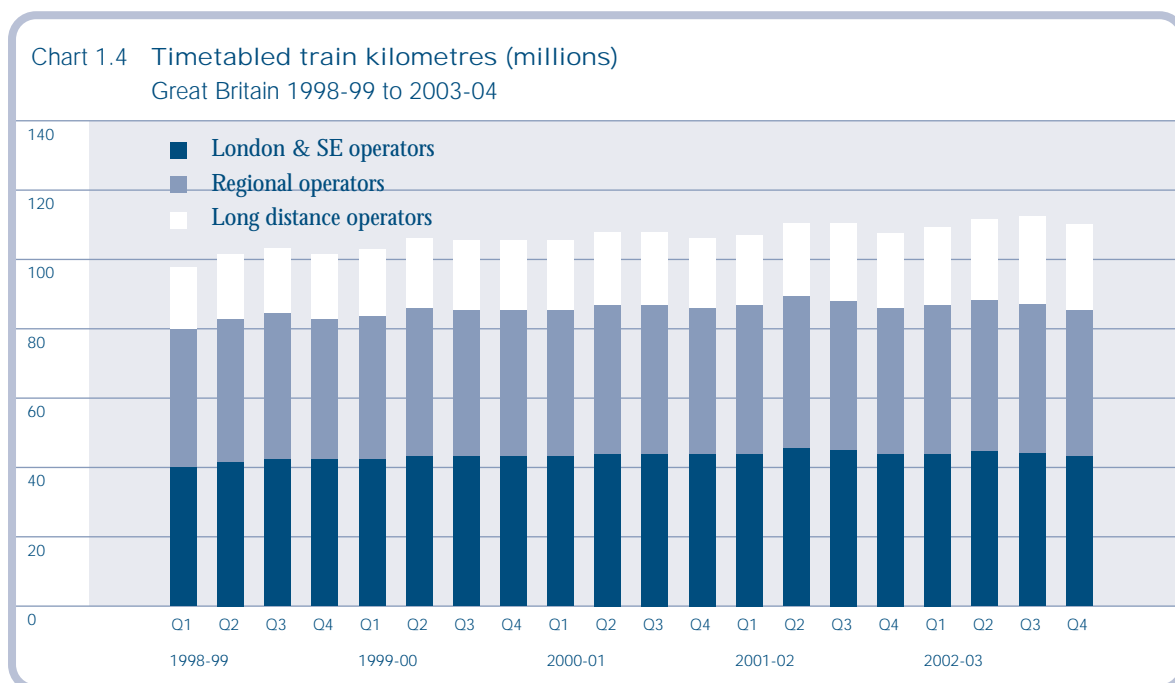
Other Comments

Train kilometre data are a measure of volume of service provision rather than a measure of performance. Used together with performance measures of the rail industry (such as PPM and Complaints), train kilometres data can help provide a more comprehensive picture of the service being provided to rail passengers.

The table includes an estimate of Great Eastern's Winter 97-98 peak train kilometres as no data were available. This should have little effect on the accuracy of data in this series.

Further details

For more detail on train kilometres please refer to the SRA Annual Report which has annual data for each operator (in train miles). This is available on the SRA website, www.sra.gov.uk



1. Rail usage continued

Table 1.4 Timetabled train kilometres by sector (millions)
Great Britain 1996-97 to 2002-03

		Long distance operators	London and SE operators	Regional operators	All operators	London & SE peak services
1997-98		66.0	154.5	155.8	376.3	22.1
1998-99		73.3	167.2	164.6	405.1	24.0
1999-00		78.7	171.9	167.8	418.4	24.6
2000-01		81.0	175.8	170.4	427.2	24.6
2001-02		85.6	178.1	172.2	435.9	25.1
2002-03		95.2	175.2	172.8	443.3	25.2
1996-97	Q3	16.1	38.1	38.5	92.7	5.9
	Q4	15.7	37.2	37.6	90.5	5.7
1997-98	Q1	15.5	36.4	36.7	88.5	5.4
	Q2	17.0	39.9	39.8	96.7	5.9
	Q3	17.0	39.5	40.1	96.7	5.5
	Q4	16.6	38.6	39.2	94.4	5.3
1998-99	Q1	17.5	40.2	40.3	98.0	5.7
	Q2	18.7	42.3	41.6	102.6	6.2
	Q3	18.8	42.9	41.9	103.5	6.2
	Q4	18.3	41.8	40.9	101.1	6.0
1999-00	Q1	19.0	42.5	41.5	103.0	6.1
	Q2	20.1	43.3	42.2	105.7	6.2
	Q3	19.9	43.3	42.3	105.5	6.2
	Q4	19.7	42.8	41.8	104.2	6.1
2000-01	Q1	19.9	43.2	42.1	105.3	6.1
	Q2	20.6	44.4	43.2	108.2	6.1
	Q3	20.4	44.3	42.7	107.5	6.2
	Q4	20.1	43.8	42.3	106.2	6.2
2001-02	Q1	20.6	44.5	42.9	108.0	6.2
	Q2	21.1	45.3	43.6	110.0	6.2
	Q3	22.2	44.7	43.3	110.3	6.3
	Q4	21.7	43.6	42.3	107.7	6.3
2002-03	Q1	22.1	44.0	43.0	109.2	6.2
	Q2	22.8	44.2	43.9	111.0	6.3
	Q3	25.4	44.0	43.4	112.9	6.4
	Q4	24.8	42.9	42.4	110.2	6.2
Percentage change 2002-03 Q4 on 2001-02 Q4		14.4	-1.6	0.2	2.3	-2.0

Note
Data for 2003-04 Q1
are currently
unavailable

2. Rail performance

Key results

The latest results cover April to June 2003.

- Between 2002-03 Q1 and 2003-04 Q1 the Public Performance Measure (PPM) for All Operators increased by two per cent.
- 84 per cent of trains ran 'on time' in 2003-04 Q1.
- Regional operators showed the greatest increase (three per cent) in PPM between 2002-03 Q1 and 2003-04 Q1.
- The Long Distance sector showed the only percentage decrease (two per cent) in PPM between 2002-03 Q1 and 2003-04 Q1.
- The number of complaints per 100,000 journeys increased by six per cent between 2002-03 Q1 and 2003-04 Q1.
- The sector that showed the greatest increase in the number of complaints per 100,000 journeys between 2002-03 and 2003-04 Q1 was the London and South East sector. The complaint rate increased by 29 per cent in this sector.
- The Regional sector showed the only decrease in the number of complaints per 100,000 journeys between 2002-03 Q1 and 2003-04 Q1. The complaint rate decreased by 17 per cent in this sector.
- In 2003-04 Q1 NRES took 14 million calls, seven per cent less than in 2002-03 Q1.
- In 2003-04 Q1 NRES answered 94 per cent of calls, one per cent lower than in 2002-03 Q1.

2.1 Public Performance Measure (PPM)

Background

The SSRA (now SRA) introduced the PPM on 6 June 2000 to give a better indication of actual performance of Britain's passenger railways. It has now replaced the Passenger's Charter as the main means of measuring passenger train performance. The Passenger's Charter is still used for season ticket refunds.

Methodology

The PPM combines figures for punctuality and reliability into a single performance measure. Unlike Charter, it covers all scheduled services, seven days a week.

The PPM measures the performance of individual trains against their planned timetable. This may differ from the published timetable (see below). Where a train fails to run its entire planned route calling at all timetabled stations it will either be shown as Cancelled (if it runs less than half of its planned mileage) or will be added to the trains in the '20 minutes or more' lateness band.

Trains that complete their journey as planned are measured for punctuality at their final destination. A train's performance is generally recorded by the automated monitoring systems, which log performance using the signalling equipment.

The 1997-98 data shown in Table 2.1a exclude First North Western for periods 1 and 2 and ScotRail for Period 1 as these data are not available. The exclusion of these figures is likely to have minimal effect on the All Operators total and the moving annual average chart. Figures are subject to revision at the end of the financial year.

As described above, the PPM compares the actual performance of the train service with the plans held in the computer systems. These plans, technically called "Plan of the Day", are usually the same as the published timetable with amendments reflecting pre-published engineering works. However, after the Hatfield accident there was a period when the plans were unstable – sometimes they reflected the normal timetable, sometimes a temporary timetable which was rendered inoperable by changes to the speed restrictions or flooding, and sometimes it reflected the service the operators were trying to run in response to unanticipated events.

Further details

For more detail on PPM data please refer to 'On Track', published every six months by the SRA.

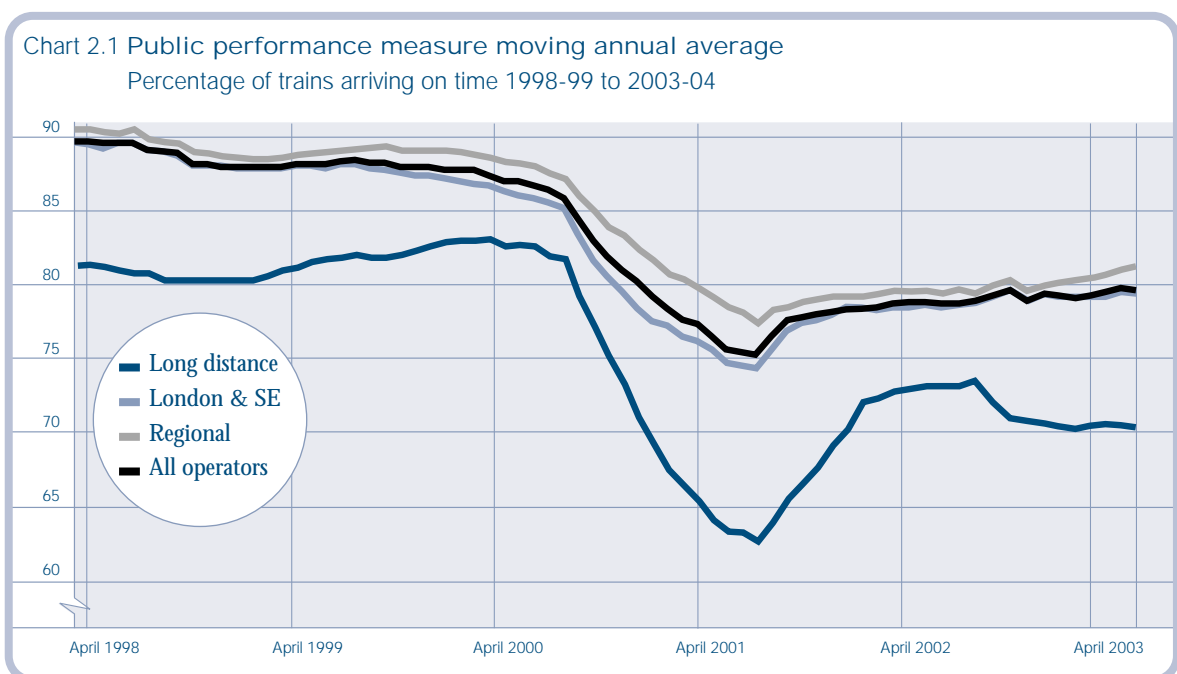


Table 2.1a Public performance measure
Percentage of trains arriving on time 1997-98 to 2003-04

		Long distance operators	London and SE operators	Regional operators	All operators	London & SE peak services
1997-98		81.7	89.6	90.6	89.7	86.9
1998-99		80.6	87.9	88.6	87.9	85.3
1999-00		83.8	87.1	89.1	87.8	85.1
2000-01		69.1	77.6	81.7	79.1	73.7
2001-02		70.2	77.8	79.1	78.0	73.6
2002-03		70.6	79.0	80.5	79.2	75.7
1997-98	Q1	84.6	91.9	92.3	91.8	90.8
	Q2	82.3	90.5	91.0	90.4	89.0
	Q3	78.1	84.8	88.0	86.0	79.9
	Q4	81.9	91.2	91.5	91.0	87.8
1998-99	Q1	81.3	90.2	90.4	89.9	88.7
	Q2	82.1	89.6	89.0	89.0	88.9
	Q3	76.3	82.1	84.6	83.0	76.8
	Q4	82.7	89.8	90.4	89.8	87.0
1999-00	Q1	85.0	91.0	91.5	91.0	89.9
	Q2	84.3	89.8	90.4	89.8	89.3
	Q3	79.7	79.4	84.0	81.5	74.4
	Q4	86.1	88.2	90.3	89.1	86.8
2000-01	Q1	84.0	87.8	89.3	88.3	87.0
	Q2	80.1	86.7	87.2	86.6	86.4
	Q3 ¹	47.9	59.8	70.9	64.3	50.0
	Q4 ¹	59.9	75.5	78.9	76.3	70.8
2001-02	Q1	65.8	81.6	81.6	80.9	79.4
	Q2	70.8	79.2	79.7	79.0	77.5
	Q3	68.1	69.3	74.1	71.3	60.8
	Q4	75.9	81.1	81.2	80.9	76.6
2002-03	Q1	76.3	83.1	83.6	83.0	80.7
	Q2	72.0	81.9	80.3	80.8	82.1
	Q3	61.2	71.9	74.7	72.6	66.2
	Q4	73.0	79.1	83.2	80.5	73.9
2003-04	Q1	74.5	83.9	85.7	84.2	83.1
Percentage change 2003-04 Q1 on 2002-03 Q1		-2.4	0.9	2.6	1.5	2.9

Note
Long Distance operators show % arriving within ten minutes of timetabled arrival at final destination. London & South East and Regional operators show % arriving within five minutes of timetabled time

¹ Data in this quarter have in some cases been calculated against temporary timetables, see notes on page 14 for further details

2. Rail performance continued

Table 2.1b Public Performance Measure by train operating company
Percentage of trains arriving on time 2003-04 Q1

	2003-04 Q1	2002-03 Q1	Year to 30 June 2003	Year to 31 March 2003
Long Distance operators				
Anglia (InterCity)	81.9	82.0	77.3	77.3
First Great Western	74.4	76.6	71.3	71.9
Great North Eastern Railway	78.3	72.0	72.4	70.8
Midland Mainline	68.8	83.5	69.9	73.6
Virgin West Coast	78.2	77.4	73.7	73.5
Virgin CrossCountry	70.2	68.5	62.5	61.7
Sector Level	74.5	76.3	70.2	70.6
London and SE operators All day				
c2c	87.3	88.1	86.1	86.3
Chiltern Railways	91.0	89.8	88.7	88.4
Connex South Eastern	84.1	84.7	79.9	80.1
First Great Eastern	92.1	90.6	88.7	88.4
Silverlink	87.7	86.0	84.4	83.9
South Central	84.5	84.8	77.1	77.2
South West Trains	77.9	75.1	72.7	72.0
Thames Trains	79.0	84.1	78.0	79.2
Thameslink	79.2	80.8	72.6	73.1
West Anglia Great Northern	86.5	79.8	80.5	78.7
Sector Level	83.9	83.1	79.2	79.0
London and SE operators Peak				
c2c	87.2	87.2	85.5	85.5
Chiltern Railways	89.7	89.3	86.1	86.0
Connex South Eastern	80.9	81.9	75.0	75.3
First Great Eastern	90.7	87.0	85.6	84.7
Silverlink	92.9	81.4	85.3	82.4
South Central	84.7	83.2	75.0	74.6
South West Trains	78.4	75.5	71.9	71.1
Thames Trains	74.9	79.7	71.5	72.7
Thameslink	76.5	79.4	68.1	69.3
West Anglia Great Northern	84.1	73.6	74.6	72.1
Sector Level	83.1	80.7	76.3	75.7
Regional operators				
Anglia Locals	90.7	84.7	85.5	84.0
Arriva Trains Merseyside	94.6	88.4	93.0	91.5
Arriva Trains Northern	87.0	83.8	81.3	80.4
Central Trains	76.2	77.7	70.2	70.6
First North Western	85.7	83.0	81.3	80.6
Gatwick Express	88.0	87.0	82.5	82.1
Island Line	97.6	96.7	97.0	96.8
ScotRail	87.2	85.9	82.6	82.1
Wales & Borders Trains	84.5	82.8	80.4	79.9
Wessex Trains	85.1	83.7	81.5	81.1
Sector Level	85.7	83.6	81.1	80.5
National Level	84.2	83.0	79.5	79.2

2.2 Rail complaints

Background

The number of complaints is a useful addition to the range of performance indicators. Unlike other 'system-based' measures, the number of complaints reflect direct feedback from passengers. Used in conjunction with other performance measures such as the PPM a more comprehensive description of rail industry service and passenger satisfaction can be reported.

Methodology

A 'complaint' is defined as "any expression of dissatisfaction by a customer or potential customer about service delivery or about company or industry policy". Train operators record and report complaints made by letter, fax, e-mail, pre-printed form or telephone.

As some TOCs carry more passengers than others, we have presented the data as a rate per 100,000 journeys. This is a superior measure to a ratio against passenger kilometres as no matter how long the trip a dissatisfied customer will only complain once. Given the varying business nature of TOCs, direct comparisons of complaint rates between TOCs in different sectors should be made with caution.

From period 10 in 2001-02 a change in methodology from three regional operators caused an increase in complaints in this sector.

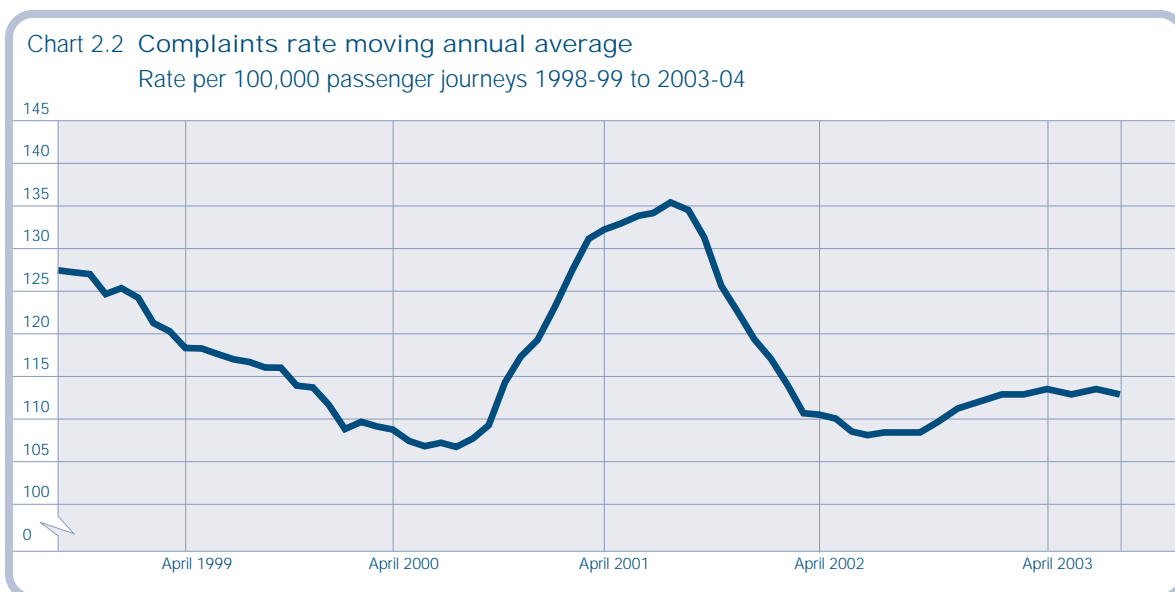
Other comments

It should be noted that an increase in complaints per 100,000 journeys does not necessarily indicate a worse performance by the industry (or sector). A number of other factors can affect the volume of complaints received. An operator that makes it easier to complain (e.g. by advertising, through the availability of pre-printed forms, by opening and extending complaint telephone lines etc) is likely to get a larger volume of complaints than it would otherwise. This TOC may however, be able to work on this feedback and in the short and long term improve its service to passengers.

In addition, the propensity to complain will vary across customer types. Customers who travel regularly on a particular route are less likely to complain about an individual journey than business or leisure travellers who make their rail journeys infrequently. This could help to explain the far higher complaint rates in the Long Distance sector where infrequent journeys are more common.

Further details

For more detail on complaints data, including individual Train Operator complaints figures, please refer to 'On Track', published every six months by the SRA.



2. Rail performance continued

Table 2.2 Complaints rate

Rate per 100,000 passenger journeys 1997-98 to 2003-04

		Long distance operators	London and SE operators	Regional operators	All operators
1998-99		856	48	94	120
1999-00		730	40	102	109
2000-01		858	48	149	131
2001-02		784	36	107	111
2002-03		824	36	94	112
1997-98	Q3	1,044	50	105	139
	Q4	1,106	45	88	133
1998-99	Q1	856	44	83	115
	Q2	780	52	102	122
	Q3	918	56	96	130
	Q4	867	40	96	114
1999-00	Q1	762	34	84	103
	Q2	797	39	102	115
	Q3	651	54	123	117
	Q4	712	32	97	99
2000-01	Q1	570	36	105	95
	Q2	757	39	126	119
	Q3	1,186	57	185	160
	Q4	1,005	59	186	152
2001-02	Q1	734 ^r	37	101	106
	Q2	848 ^r	35	104	115
	Q3	772 ^r	36	111	109
	Q4	781 ^r	36	112	112
2002-03 ^r	Q1	711	27	77	92
	Q2	828	32	102	112
	Q3	915	44	104	127
	Q4	833	41	91	116
2003-04	Q1	723	34	64	98
Percentage change 2003-04 Q1 on 2002-03 Q1		1.7	28.7	-16.9	6.3

2.3 National Rail Enquiry Scheme (NRES)

Background

The National Rail Enquiry Scheme (NRES) is the telephone enquiry service that provides information primarily on train times and fares. NRES is available 24 hours a day and can be contacted on 0845 7 48 49 50.

NRES is the first point of contact with the rail industry for many potential passengers, especially infrequent travellers. It is vital that it provides a timely and accurate response to the public. NRES is regulated by the SRA and its minimum performance standards are set out in the NRES Agreement. The latest Agreement, which came into force on 1 April 2001, is for 92.5 per cent of calls to be answered in the 12 month period to 31 March 2002 and for no less than 90 per cent of calls to be answered in any four week Railway Period. It also introduces a formal quality regime, reflecting the SRA's emphasis on quality.

Methodology

The relevant quantitative data are provided by British

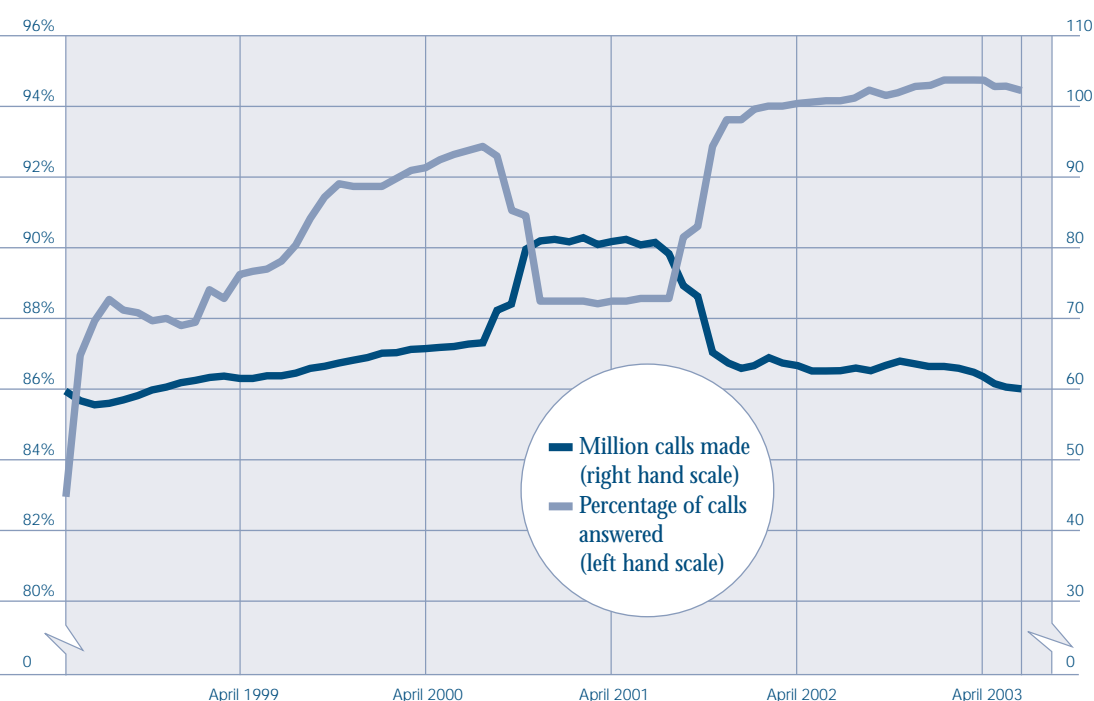
Telecom and include the number of calls answered, calls engaged and calls where there is no reply to the tone ("Ring Tone No Reply"). Data up to 1998-99 are based on apportionment of period data to quarters. From 1999-00 Q1 quarterly figures are based on aggregated daily data.

Other comments

It should be noted that the automatic data collection is unable to distinguish between calls being answered by a human voice and those answered by an automatic message/answering machine. The results can therefore be said to provide a good indication of volume of calls made and answered. They do not however measure the quality of service given by NRES. Potential passengers require prompt, accurate information as well as efficient telephone answering.

NRES performance is susceptible to volatile demand levels. Although some aspects affecting demand can be predicted (e.g. time, holiday periods, sporting events etc) some are very hard to predict (e.g. weather).

Chart 2.3 National Rail Enquiry Scheme moving annual averages
Calls made and percentage of calls answered 1998-99 to 2003-04



Note
This chart plots the changes in total calls and percentage of calls answered since May 1998. Each point represents preceding 13 periods (ie. one year)

2. Rail performance continued

Table 2.3 National Rail Enquiry Scheme (million calls and percentage of calls)
1997-98 to 2003-04

		Total calls made	Percentage answered	Percentage engaged	Percentage RTNR ¹
1998-99		61.7	88.3	1.9	9.8
1999-00		65.5	92.2	1.3	6.5
2000-01		81.3	88.4	3.2	8.4
2001-02		62.7	94.1	0.3	5.6
2002-03		62.2	94.7	0.4	4.9
1997-98	Q2	15.8	79.9	7.3	12.8
	Q3	13.8	92.7	1.3	6.1
	Q4	12.3	91.6	2.1	6.3
1998-99	Q1	15.1	86.7	2.8	10.5
	Q2	16.4	84.8	0.7	14.5
	Q3	16.0	89.2	1.0	9.8
	Q4	14.3	93.1	3.3	3.6
1999-00	Q1	15.8	91.2	3.7	5.1
	Q2	17.1	91.1	0.7	8.2
	Q3	17.4	91.7	0.9	7.4
	Q4	15.2	95.0	0.1	4.9
2000-01	Q1	16.6	93.5	0.3	6.2
	Q2	22.8	86.1	6.6	7.3
	Q3	26.7	83.8	3.7	12.5
	Q4	15.2	94.4	0.3	5.2
2001-02	Q1	15.8	94.3	0.3	5.4
	Q2	16.1	93.7	0.4	5.9
	Q3	15.6	93.6	0.2	6.3
	Q4	15.2	94.7	0.3	5.0
2002-03	Q1	15.3	95.0	0.3	4.7
	Q2	16.5	94.4	0.6	5.0
	Q3	16.0	94.4	0.3	5.3
	Q4 ²	14.1	95.5	0.3	4.2
2003-04	Q1	14.2	94.4	0.4 ^p	5.2 ^p
Percentage change 2003-04 Q1 on 2002-03 Q1		-7.5	-0.6		

¹ Ring tone no reply

² The number of calls to NRES may have been affected by the introduction of an internet enquiry service in March 2003

3. Fares

Key Results

The following data (and hence the key results) are unchanged from the previous edition of 'National Rail Trends' (2002-03 Q4)

Please note: figures quoted on this page are real terms changes, i.e. allowing for inflation.

- The overall average change in the price of rail fares between January 2002 and January 2003 was +0.2 per cent.
- For standard class tickets the average change in the price was -0.1 per cent between January 2002 and January 2003, while the average for First Class tickets was +2.4 per cent.
- The average change in the price of regulated fares between January 2002 and January 2003 was -0.9 per cent.
- Fares on Regional operators showed the greatest decrease between January 2002 and January 2003. Prices decreased by 1.1 per cent in the sector, while prices on London and South East operators showed an average decrease of 0.3 per cent.
- Long Distance operators showed an increase in fares of 1.4 per cent between January 2002 and January 2003.
- The overall change in the price of rail fares between January 1995 and January 2003 was +3.4 per cent. Over this period regulated fares decreased by 6.6 per cent.

3. Fares continued

3.1 Fares Price Index

Background

For more information on the methodology used to construct the Fares Index please refer to National Rail Trends 2001-02 Quarter Four edition.

What the Fares Price Index measures

The Rail Fares Price Index provides a measure of the change in the prices charged by Train Operating Companies (TOCs) to rail passengers. The Fares Price Index takes into account the range of price changes experienced by passengers and presents the average change in prices taken from the millions of transactions that take place each year. Essentially, the Index gives an indication of what we would need to spend in order to purchase the same set of tickets we chose to buy in a previous year. Some passengers will have experienced greater or lesser fares changes than shown by the average changes calculated.

Coverage of the Fares Price Index

It has been our aim to represent all rail travel in England, Scotland and Wales in the index. We have therefore sought, as far as is practically possible, to construct the index so that it covers the costs of travel only. This is done by excluding fares which include 'extras' in order not to distort the index. Where the purchase of a 'rail' ticket includes additional services such as multi-modal tickets for urban areas, bus tickets, entrance fees to attractions etc. they have been excluded from the Index. An exception to this is the London Travelcard. We have included these in the index because such tickets are so important in the earnings of train operators and purchases by rail passengers. In addition, Train Operators influence price changes associated with these tickets. We are, however, able to recalculate the index excluding Travelcards if required. Other exclusions are set out later in this note.

Notes

The Rail Fares Index is, for practical reasons, unable to cover every single transaction in a given year. Earlier we explained that rail tickets sold as an

element of a package of services were excluded. The other exclusions are listed below. However, as the index is based on millions of transactions covering over 90 per cent of the total earnings from fares, the omissions are considered to have a negligible impact on the aggregate indices.

- Newly introduced tickets are not properly accounted for in their first year as the index's price information is based on snapshots from January Year 1 and Year 2.
- The index does not include short-term temporary fares/promotions.
- The index does not take immediate (within year) account of passengers 'switching' ticket types following the introduction/deletion of certain tickets.
- The index includes rail tickets with a London Transport 'Travelcard' add-on but excludes all other multi-modal tickets.
- Coverage is limited to transactions recorded in the ticketing system (although we believe there to be only a negligible amount of activity that escapes this system).
- The index excludes flows whose total annual earnings are below specific thresholds. This is to reduce the volume of data and excludes only those flows which generate minimal earnings (typically a maximum of £50 per annum).
- The index excludes flows for which we were unable to find price information for either of the two reference years, for example a ticket type that is introduced after the first reference date.
- Results for 1995-99 exclude First Class Travelcards (due to the way data for this category were held historically).
- Results up to, and including, January 1998 are based on the profile of tickets purchased in 1995-96. Thereafter, results are based on the profile of tickets purchased in the 'base' year of comparison. For example, the comparison between prices in January 1998 and January 1999 is based on the profile of tickets purchased in 1998 etc.

Table 3.1 Average change in price of rail fares, 1995-2003
(January 1995 = 100)

	January 1995	January 1996	January 1997	January 1998	January 1999	January 2000	January 2001	January 2002	January 2003	Jan 2002 – Jan 2003		Real terms changes in average price	
										Average change in price (per cent)	Expenditure weights (per cent of total)	2003 on 2002	2003 on 1995
London and SE operators													
First class	100.0	103.2	105.2	109.2	113.1	115.4	118.8	118.7	122.4	3.2	2	0.3	0.2
Standard class regulated	100.0	103.6	105.9	109.6	111.1	111.1	112.1	110.6	113.1	2.2	28	-0.7	-7.4
Standard class unregulated	100.0	103.6	106.0	110.3	114.7	117.7	121.5	123.4	127.0	2.9	20	0.0	3.9
All standard class	100.0	103.6	105.9	109.9	112.4	113.6	115.7	115.6	118.5	2.5	48	-0.4	-3.0
All tickets	100.0	103.6	105.9	109.8	112.5	113.7	115.8	115.7	118.6	2.5	50	-0.3	-2.9
Long distance operators													
First class	100.0	101.9	104.7	109.5	121.8	136.7	145.8	156.8	166.2	6.1	8	3.1	36.1
Standard class regulated	100.0	101.2	103.7	107.2	111.1	111.2	109.0	113.0	115.3	2.0	10	-0.8	-5.6
Standard class unregulated	100.0	101.9	104.9	109.2	115.6	123.7	128.3	134.3	140.8	4.8	17	1.8	15.2
All standard class	100.0	101.7	104.6	108.6	114.4	120.1	122.3	127.6	132.4	3.8	27	0.9	8.4
All tickets	100.0	101.7	104.6	108.8	115.6	123.5	127.3	133.8	139.6	4.3	35	1.4	14.2
Regional operators													
First class	100.0	104.0	105.8	110.8	113.9	120.8	126.5	132.5	136.7	3.2	7	0.3	11.9
Standard class regulated	100.0	101.2	104.4	107.7	110.5	111.5	113.6	115.3	116.4	1.0	7	-1.8	-4.7
Standard class unregulated	100.0	101.4	104.6	108.0	112.4	115.3	118.8	121.5	124.2	2.2	8	-0.7	1.6
All standard class	100.0	101.3	104.5	107.9	111.6	113.7	116.6	118.8	120.8	1.7	14	-1.2	-1.1
All tickets	100.0	101.4	104.6	108.0	111.6	113.9	116.9	119.3	121.3	1.7	15	-1.1	-0.7
All operators													
First class	100.0	102.3	104.9	109.5	119.4	131.5	139.2	147.6	155.6	5.4	11	2.4	27.3
Standard class regulated	100.0	102.9	105.3	108.9	111.0	111.2	111.7	111.9	114.1	2.0	44	-0.9	-6.6
Standard class unregulated	100.0	102.5	105.3	109.4	114.6	119.7	123.7	127.3	131.8	3.5	45	0.6	7.8
All standard class	100.0	102.7	105.3	109.2	112.9	115.6	117.8	119.6	122.9	2.8	89	-0.1	0.6
All tickets	100.0	102.6	105.2	109.2	113.5	117.2	120.1	122.5	126.3	3.1	100	0.2	3.4
RPI (all items)	100.0	102.9	105.8	109.3	111.9	114.1	117.2	118.7	122.2	2.9			

4. Freight

Key Results

- Freight moved (measured in net tonne kilometres) decreased by three per cent between 2002-03 Q1 and 2003-04 Q1.
- The greatest commodity percentage increase between 2002-03 Q1 and 2003-04 Q1 was for international freight moved, which increased by nine per cent.
- Infrastructure moved (which is not included in the freight moved total) increased by 15 per cent between 2002-03 Q1 and 2003-04 Q1.
- The greatest commodity percentage decrease between 2002-03 Q1 and 2003-04 Q1 was for metal freight moved, which decreased by 19 per cent.
- Total freight lifted remained virtually unchanged between 2002-03 Q1 and 2003-04 Q1.
- Between 2002-03 Q1 and 2003-04 Q1, coal lifted increased by five per cent while other goods lifted decreased by four per cent.

4.1 Freight moved

Background

In February 1996, British Rail's bulk freight operations were sold to North and South Railways – now called English, Welsh and Scottish Railway (EWS). The other major companies in the rail freight sector are Freightliner Ltd (formerly the BR container business), Direct Rail Services (DRS) and GB Railfreight.

Freight moved is the major series used by the SRA to monitor freight activity, and this series provides the benchmark for the DfT 10 Year Plan target of 80 per cent growth in rail freight from 2000-01.

Methodology

Freight moved is measured in net tonne kilometres (NTKMs). This takes into account the net weight (excluding the weight of the locomotive and wagons)

of the goods carried (the freight lifted, measured in tonnes) and the distance carried. Although it is not included in the total NTKMs, we have included a separate series on infrastructure traffic (goods used for railway engineering work).

International traffic comprises trains travelling through the Channel Tunnel; Domestic Intermodal includes goods that have arrived by sea at ports.

Pre 1998-99 data are not directly comparable to the new data due to change in the source of the data. Please refer to National Rail Trends 2001-02 Q1 for more details.

There is a further break in the series between 1995-96 and 1996-97 due to a change in the method of data collection.

4. Freight continued

Table 4.1 Freight moved (billion net tonne kilometres)
Great Britain 1986-87 to 2003-04

		Coal	Metals	Construction	Oil and petroleum	International	Domestic intermodal	Other	Total ¹	Infra-structure ²
1986-87		5.0	..	..	..	..	..	..	16.6	..
1987-88		4.6	..	..	..	..	..	..	17.5	..
1988-89		4.8	..	..	..	..	..	..	18.1	..
1989-90		4.6	..	..	..	..	..	..	16.7	..
1990-91		5.0	..	..	..	..	..	..	16.0	..
1991-92		5.0	..	..	..	..	..	..	15.3	..
1992-93		5.4	..	..	..	..	..	..	15.5	..
1993-94		3.9	..	..	..	..	..	..	13.8	..
1994-95		3.3	..	..	..	..	..	..	13.0	..
1995-96		3.6	..	..	..	..	..	..	13.3	..
1996-97		3.9	..	..	..	..	..	..	15.1	..
1997-98		4.4	..	..	..	..	..	..	16.9	..
1998-99		4.5	2.1	2.1	1.6	1.1	3.5	2.5	17.3	0.8
1999-00		4.8	2.2	2.0	1.5	1.0	3.9	2.7	18.2	0.8
2000-01		4.8	2.1	2.4	1.4	1.0	3.8	2.6	18.1	0.9
2001-02		6.2	2.4	2.8	1.2	0.6	3.5	2.6 ^f	19.4	1.2
2002-03		5.7	2.7	2.6	1.1	0.4	3.4	2.7	18.7	1.2
1998-99	Q1	0.9	0.6	0.5	0.4	0.3	0.8	0.6	4.0	0.2
	Q2	1.2	0.5	0.6	0.4	0.3	0.9	0.6	4.5	0.2
	Q3	1.1	0.5	0.5	0.4	0.3	0.9	0.6	4.3	0.2
	Q4	1.3	0.5	0.5	0.4	0.3	0.9	0.7	4.6	0.2
1999-00	Q1	1.2	0.6	0.5	0.4	0.3	0.9	0.6	4.5	0.2
	Q2	1.1	0.5	0.5	0.4	0.2	1.0	0.7	4.5	0.2
	Q3	1.2	0.5	0.5	0.4	0.3	1.0	0.7	4.6	0.2
	Q4	1.3	0.6	0.6	0.4	0.3	1.0	0.7	4.8	0.2
2000-01	Q1	1.2	0.6	0.6	0.3	0.3	1.0	0.7	4.7	0.2
	Q2	1.1	0.5	0.6	0.3	0.3	1.0	0.7	4.6	0.2
	Q3	1.0	0.4	0.6	0.3	0.2	1.0	0.6	4.2	0.2
	Q4	1.4	0.5	0.6	0.3	0.2	0.9	0.7	4.7	0.3
2001-02	Q1	1.5	0.6	0.7	0.3	0.2	0.9	0.7	4.8	0.3
	Q2	1.6	0.6	0.7	0.3	0.2	0.9	0.7	4.9	0.3
	Q3	1.6	0.6	0.7	0.3	0.1	0.9	0.6	4.8	0.3
	Q4	1.5	0.7	0.7	0.3	0.1	0.9	0.7	4.9	0.3
2002-03	Q1	1.4	0.7	0.6	0.3	0.1	0.9	0.7	4.7	0.3
	Q2	1.5	0.6	0.7	0.3	0.1	0.9	0.7	4.7	0.3
	Q3	1.4	0.6	0.6	0.3	0.1	0.8	0.7	4.6	0.3
	Q4	1.5	0.7	0.7	0.3	0.1	0.8	0.7	4.7	0.3
2003-04	Q1	1.4	0.6	0.7	0.3	0.1	0.9	0.7	4.6	0.3
Percentage change										
2003-04 Q1										
on 2002-03 Q1										
		-2.4	-18.8	4.1	1.0	9.4	-3.5	5.9	-2.6	14.7

¹Infrastructure not included in total

²This series excludes some possession trains

Note

For more details on the breaks in the series please refer to note on page 25

Source: Network Rail

Chart 4.1a Freight moved (billion net tonne kilometres)
Great Britain 1998-99 to 2003-04

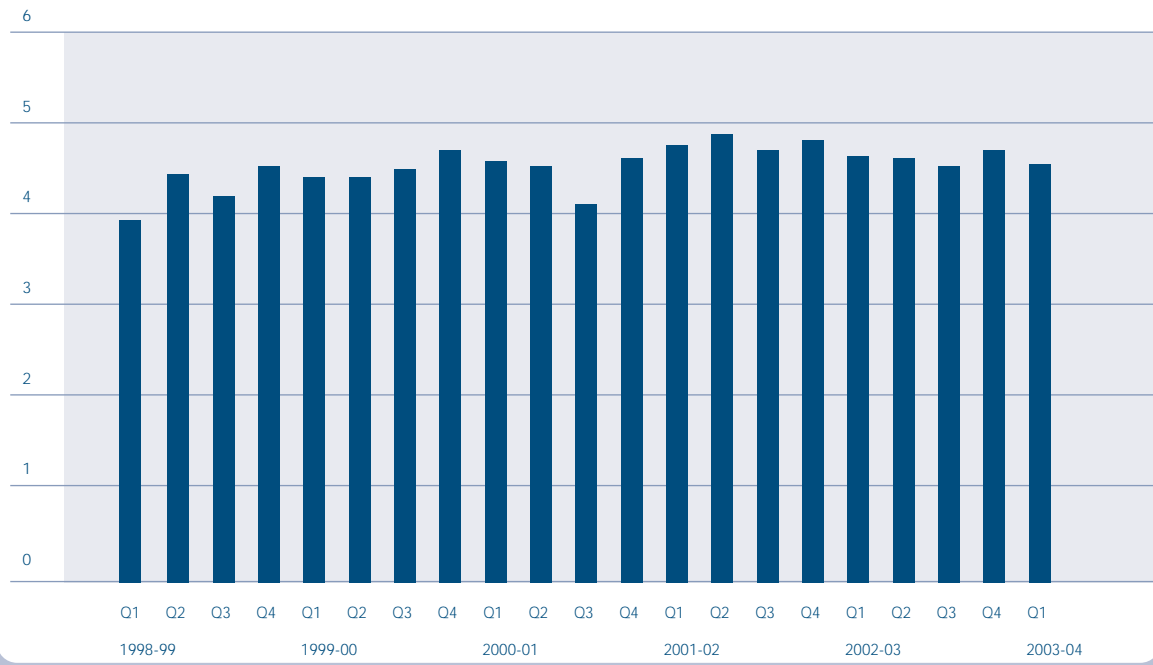
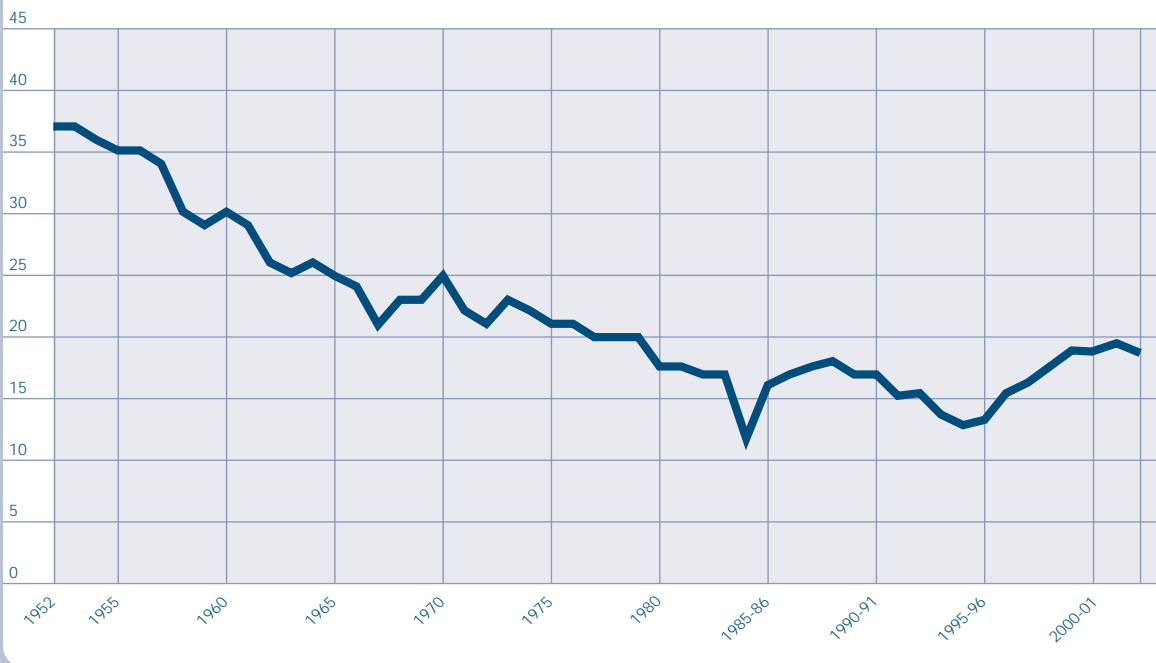


Chart 4.1b Freight moved (billion net tonne kilometres)
Great Britain 1952 to 2002-03



Note
Please refer to notes
on page 25 for
information on breaks
in this series

4. Freight continued

4.2 Freight lifted

Table 4.2 Freight lifted (million tonnes)
Great Britain 1986-87 to 2003-04

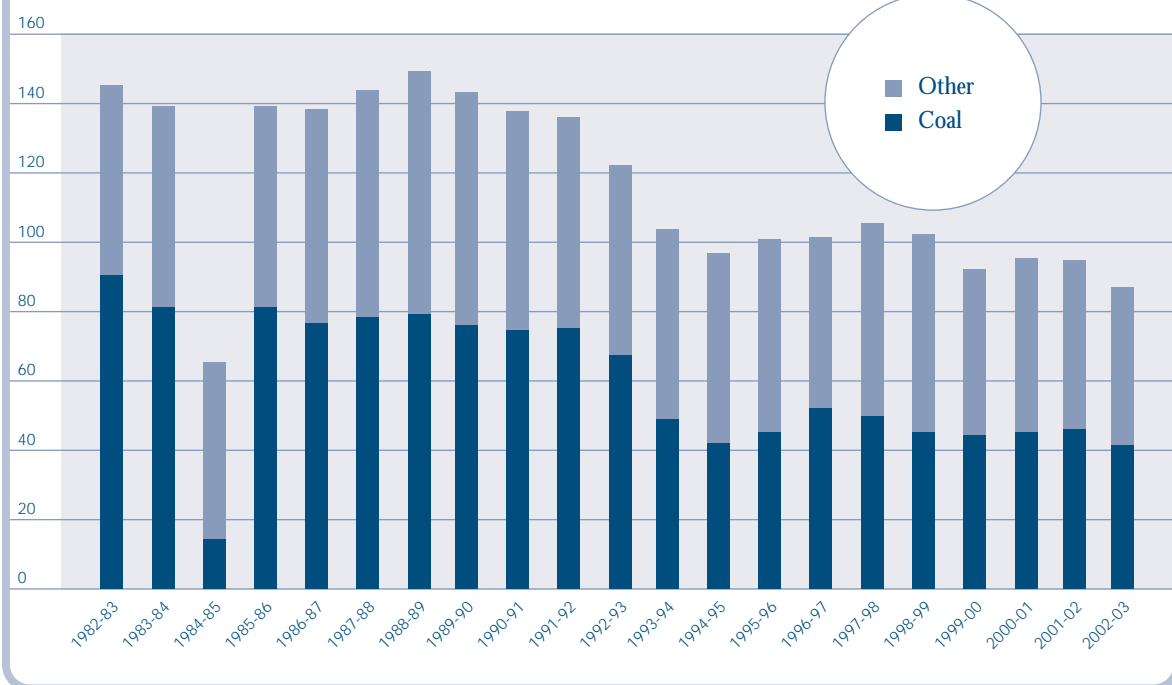
		Coal	Other	Total
1986-87		77.2	61.2	138.4
1987-88		78.8	65.6	144.4
1988-89		79.2	70.3	149.5
1989-90		75.8	67.3	143.1
1990-91		74.7	63.4	138.2
1991-92		75.1	60.7	135.8
1992-93		67.9	54.4	122.4
1993-94		48.9	54.3	103.2
1994-95		42.5	54.8	97.3
1995-96		45.2	55.5	100.7
1996-97		52.2	49.6	101.8
1997-98		50.3	55.1	105.4
1998-99		45.3	56.8	102.1
1999-00		44.3	47.6	91.9
2000-01		45.7	49.7	95.4
2001-02		46.1	48.3	94.4
2002-03		40.7	46.4	87.0
1999-00	Q1	10.1	12.6	22.7
	Q2	10.6	13.0	23.6
	Q3	11.1	12.8	23.9
	Q4	12.5	9.2	21.7
2000-01	Q1	11.7	13.2	24.9
	Q2	10.8	12.8	23.6
	Q3	10.9	11.4	22.4
	Q4	12.3	12.3	24.6
2001-02	Q1	11.9	12.5	24.4
	Q2	11.4	12.1	23.5
	Q3	11.3	11.7	23.0
	Q4	11.5	12.1	23.6
2002-03	Q1	10.0	11.8	21.8
	Q2	9.6	11.4	20.9
	Q3	10.0	11.2	21.2
	Q4	11.1	12.0	23.1
2003-04	Q1	10.5	11.4	21.9
Percentage change 2003-04 Q1 on 2002-03 Q1		5.4	-4.0	0.3

Note
Data pre and post privatisation are not directly comparable.
Data from 1999-00 are not directly comparable due to a change in methodology

Source: Freight Operators

Freight lifted is the mass of goods carried on the network. It excludes the weight of the locomotives and wagons. Unlike Freight Moved it takes no account of distance travelled.

Chart 4.2 Freight lifted (million tonnes)
Great Britain 1982-83 to 2002-03



4.3 Freight Key Performance Indicators

In its Corporate Plan 2003-04, the SRA made the commitment to “develop a wider range of key performance indicators and performance measures to better publicise the growth of rail freight”. This statement recognised the limitations of reporting freight performance on the basis of freight moved and freight lifted only.

In particular, these measures tend to reflect the traditional use of the network by heavy (bulk) freight. The contribution of non-bulk freight such as

containers and parcels is in some senses under measured at present, due to its low weight in relation to volume. Hence, the use of dead weight based measures alone is insufficient to fully demonstrate the role of rail in the GB freight sector.

As an example, in 2002/03 Domestic Waste traffic only accounted for 1.5% of all freight moved in terms of net tonne kilometres. However, the respective share of traffic as measured in equivalent lorry-kilometres was 4.1%.

Freight moved and lifted

Freight moved and freight lifted are published quarterly in National Rail Trends. Even with the limitations described above, these measures still have value as the 80% growth target is measured in net

tonne kilometres. In addition to the figures already published in National Rail Trends, cumulative growth in rail freight moved since the start of the 10-Year Plan is also now included.

Table 4.3a Freight moved and lifted
Great Britain

Freight moved	2002-03	2001-02	Change to 02-03
Annual (bn net tonne kms)	18.7	19.4	-3.4%
Cummulative growth since start of 10-Year Plan	3.6%	7.2%	
Freight lifted			
Annual (million tonnes)	87.0	94.4	-7.8%

Note
The baseline figure to measure cumulative growth refers to freight moved in 2001/01.

Source:SRA

Rail market share

This includes rail's share of both surface-based heavy freight transport (i.e. rail plus HGVs), and the overall GB freight sector (i.e. including LGVs, pipelines and water transport). These figures illustrate the relative importance of rail, and aid comparison with the

10-Year Plan target of rail securing 10% of total freight moved. Rail's market share in terms of freight moved is significantly higher than the freight lifted metric because the length of the average rail freight haul is comparatively high.

Table 4.3b Rail market share
Great Britain

	2002		2001		2000	
	Rail Share	Market size (bn net tonne kms)	Rail Share	Market size (bn net tonne kms)	Rail Share	Market size (bn net tonne kms)
Freight moved						
Surface transport (Rail + HGV)	11.2%	168.7	11.4%	168.6	10.8%	168.7
Overall market	-	-	7.8%	246.4	7.1%	255.0
Freight lifted						
Surface transport (Rail + HGV)	5.1%	1,714.5	5.7%	1,676.4	5.5%	1,685.6
Overall market	-	-	4.7%	2,038.1	4.5%	2,070.0

Sources: SRA, DfT and DTI. Data are only available in calendar year form.

Impacts on road haulage

These measures provide an alternative to the traditional “deadweight” based approach. As they are driven more by volume than by weight they will better reflect changes in some of the new, currently understated markets.

“Rail freight lorry kilometres equivalent” represents the equivalent distance that road vehicles would need to travel to move the amount of freight currently on rail. “Avoided lorry journeys” represents the equivalent number of road vehicle trips necessary to move this freight.

Table 4.3c Impacts on road haulage
Great Britain

	2002-03	2001-02	Change to 02-03
Rail freight lorry kms equivalent	1.36 billion	1.42 billion	-4.8%
Avoided lorry journeys	5.59 million	6.20 million	-9.8%

The results are derived from NRT and DfT’s Continuing Survey of Road Goods Transport.

Direct measures of freight activity

These measures provide direct reflections of the level of rail freight activity. In combination with the other indicators, the measures provide a balanced picture

of the industry. The amounts shown for investment are both the cumulative amount since privatisation and the subtotal for the 2002/03 financial year.

Table 4.3d Number of freight trains
Great Britain

	2002-03	2001-02	Change to 02-03
Number of freight trains	374,387	363,429	3.0%

Sources: Network Rail.

Table 4.3e Investment in rolling stock (£ millions)
Great Britain

	1994/95-2002-03 (since privatisation)	2002-03 (subtotal)
Investment in freight rolling stock	803	114

Sources: SRA and FOCs. Note: Investment figures include rolling stock and related facilities.

5. Miscellaneous tables

Key Results

- The average age of rolling stock remained virtually unchanged at 19.3 years between 31 March 2003 and 30 June 2003.
- The value of Freight Grants decreased by 14 per cent between 2001-02 and 2002-03 (not allowing for inflation).
- Total Investment in National Railways increased by three per cent in 1999-00 prices between 2001-02 and 2002-03.
- Total government support to the rail industry (including PTE grants) increased by 42 per cent between 2001-02 and 2002-03 (not allowing for inflation).

5.1 Government support

Prior to 1994-95, Government support to the rail industry comprised of grants to British Rail and the PTEs, and borrowing by BR from the National Loans Fund. The peak in 1992-93 relates to the high level of investment on Channel Tunnel related assets in that year.

The restructuring of BR in April 1994 led to changes in the basis of Government funding. Grant levels were set to allow the newly formed rail companies to earn commercial returns. Support for passenger services was channelled through the Office of Passenger Rail Franchising (OPRAF) and the PTEs, who were funded by the Revenue Support Grant and an additional Metropolitan Rail Grant.

Any cash surpluses that were earned were returned to the Exchequer and used to reduce the net level of support to the industry while the rail companies were still in the public sector. In addition, in 1995-96 and 1996-97 the net funding requirement for the industry was further reduced by proceeds from the sales of the rolling stock leasing companies and BR non-passenger businesses.

Government support to the rail industry from 1997-98 chiefly consists of OPRAF (now SRA) support grants, PTE Special grants and a grant to BR to finance its residual activities.

Rail freight grants are paid by the Government to encourage the movement of freight by rail.

5. Miscellaneous tables continued

Table 5.1 Government support to the rail industry (£ millions)
Great Britain 1985-86 to 2002-03

	Revenue support grants to domestic passenger services Central		Direct rail support ³	Other elements of government support ⁴	Total government support excluding PTE grants ⁵	Total government support including PTE grants ⁶	Freight grants
	government grants ¹	PTE Grants ²					
1985-86	849	78	–	61	910	988	7
1986-97	755	70	–	22	777	847	6
1987-88	796	68	–	-251	545	613	2
1988-89	551	70	–	-175	376	446	2
1989-90	479	84	–	232	711	795	1
1990-91	637	115	–	440	1,077	1,192	4
1991-92	902	120	–	562	1,464	1,584	1
1992-93	1,194	107	–	870	2,064	2,171	2
1993-94	926	166	–	535	1,461	1,627	4
1994-95	1,815	346	–	-464	1,497	1,697	3
1995-96	1,712	362	–	-1,643	231	431	4
1996-97	1,809	291	–	-1,044	775	1,056	15
1997-98	1,429	375	–	25	1,454	1,829	29
1998-99	1,196	337	–	53	1,249	1,586	29
1999-00	1,031	312	–	75	1,106	1,418	23
2000-01	847	283	–	84	931	1,214	36
2001-02	731	306	684	105	1,520	1,826	57
2002-03	935	304	1,166	183	2,284	2,588	49

Source: DfT

¹ Until 1993-94 this consisted of Public Service Obligation (PSO) Grant and Level Crossing Grant to British Rail. From 1994-95 onwards PSO grants were replaced by OPRAF support and grants to BR and, from the point of franchise, to the private sector TOCs. Level Crossing Grant was paid to Railtrack in 1994-95 and 1995-96 and discontinued at the start of 1996-97 with the transfer of Railtrack into private ownership.

² Grants paid by the seven metropolitan PTEs under Section 20 of the Transport Act 1968, to secure passenger rail services in their respective areas. Until 1993-94 this support was funded entirely through Rate Support Grant and PTEs' own resources. In 1994-95 and 1995-96 additional funding was paid, via DoT and the Scottish Office, under the Metropolitan Rail Grant. The PTE Special grant was introduced in 1997-98, with DETR making Special Grant payments to English PTAs and the Scottish Office (since 1 July 1999, the Scottish Executive) making Special Grant payments to local authorities in the Strathclyde PTA area. On 1 April 2001, the PTE Special Grants paid to English PTAs by DETR were replaced by SRA grants to English PTAs. Loan repayments under Deeds of Assumption, by the public sector railway industry to the PTAs, were made in 1995-96. They continued to be made from 1996-97 to 2000-01 by BR and DoA Ltd. On 1 February 2001, the SRA took over responsibility for making BR's loan

repayments; on 1 October 2001 the SRA took over responsibility for making DoA Ltd's loan repayments.

³ In 2001-02 comprises £499 million of network grant paid to Railtrack and £185 million CTRL Capital grant. In 2002-03 it comprises £792 million of network grants paid to Railtrack/Network Rail and £374 million Channel Tunnel Rail Link Capital Grant.

⁴ Chiefly comprises the changes in indebtedness (borrowing minus lending) of the rail industry (i.e. BR until 1993-94; Railtrack, Rolling Stock Companies (ROSCOs), Union Railways and European Passenger Services from 1994-95 until the point the businesses were privatised). Also includes proceeds from the sale of ROSCOs, and, from 1 April 1997 to 31 January 2001, BR's external finance requirement (EFR). Since 1 February 2001 the expenditure formerly funded from BR's EFR has been funded by the SRA. Since 1 April 2001, the SRA has also undertaken expenditure on project development, taking a lead role in sponsoring the development of network enhancements.

⁵ Central Government support to the industry, ie columns 1, 2 and 3 plus the Department's and Scottish Office MRG payments in 1994-95 and 1995-96 (see PTE Grant note above).

⁶ Total Government support to the rail industry, ie columns 1, 2, 3 and 4.

5.2 Investment

These data record expenditure on fixed assets and exclude depreciation. They are based on the British Rail Board accounts until 1993-94. They include expenditure on rolling stock, track renewals, new routes and electrification, signalling, buildings, plant and equipment. Investment funded by PTE grants is not included for any year. There were changes in accounting procedures when the industry was restructured in April 1994 which mean that results pre and post 1994-95 are not directly comparable. For example, Railtrack now include expenditure in their capital account which would previously have

been recorded as maintenance expenditure. The results for 1993-94, 1994-95 and also 1995-96 include private sector investment on the Heathrow Express, Ashford International Station and new Networker trains.

Since 1996-97, the Office for National Statistics has collected the data on investment by the private sector companies. The 1996-97 total in Table 5.2 includes both investment by Railtrack in that part of the year when it was a publicly owned company and also investment by the British Rail Board during the same year.

Table 5.2 Investment in the rail industry (£ millions)
Great Britain 1986-87 to 2002-03

	Rolling stock	Other	Total investment	Total investment at 1999-00 prices
1986-87	81	449	530	904
1987-88	103	527	631	1,022
1988-89	208	487	695	1,055
1989-90	234	655	889	1,258
1990-91	329	693	1,022	1,342
1991-92	453	840	1,293	1,599
1992-93	537	939	1,476	1,769
1993-94	422	762	1,184	1,382
1994-95	360	890	1,250	1,439
1995-96	200	900	1,100	1,230
1996-97	47	1,178	1,225	1,327
1997-98	114	1,430	1,544	1,627
1998-99	176	1,823	1,999	2,046
1999-00	236	2,012	2,248	2,248
2000-01	554	2,404	2,958	2,893
2001-02 ¹	922	3,148	4,070	3,885
2002-03 ²	566	3,756	4,322	4,005

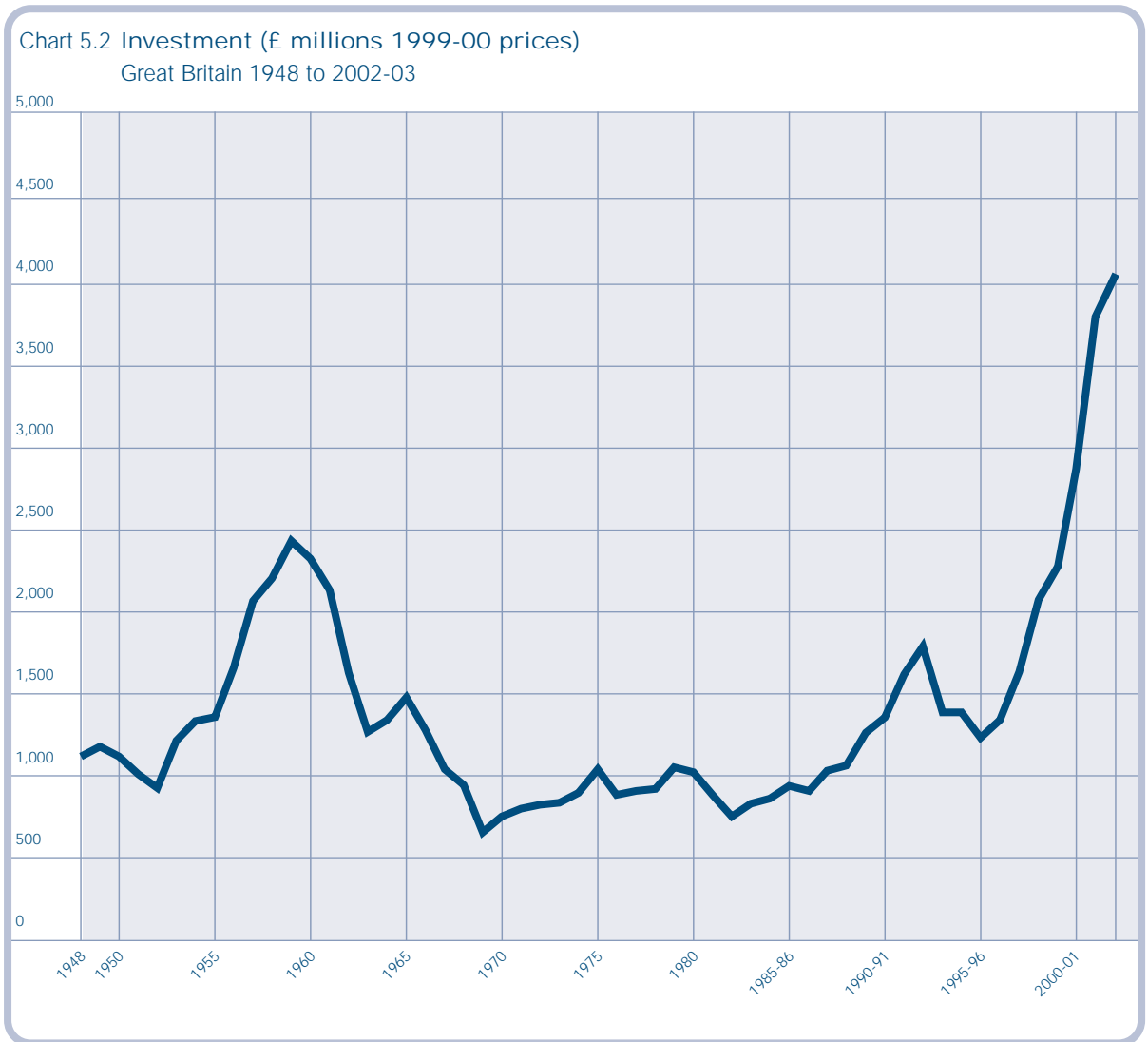
Break in series
(see notes)

Source:
Office for National
Statistics

¹ The government made direct grants of £499 million to Railtrack PLC and £185 million to London and Continental Railways to finance part of the investment undertaken by those companies in 2001-02 (see also footnote 3, table 5.1).

² The government made direct grants of £792 million to Railtrack PLC/Network Rail and £374 million to London and Continental Railways to finance part of the investment undertaken by those companies in 2002-03 (see also footnote 3, table 5.1).

5. Miscellaneous tables continued

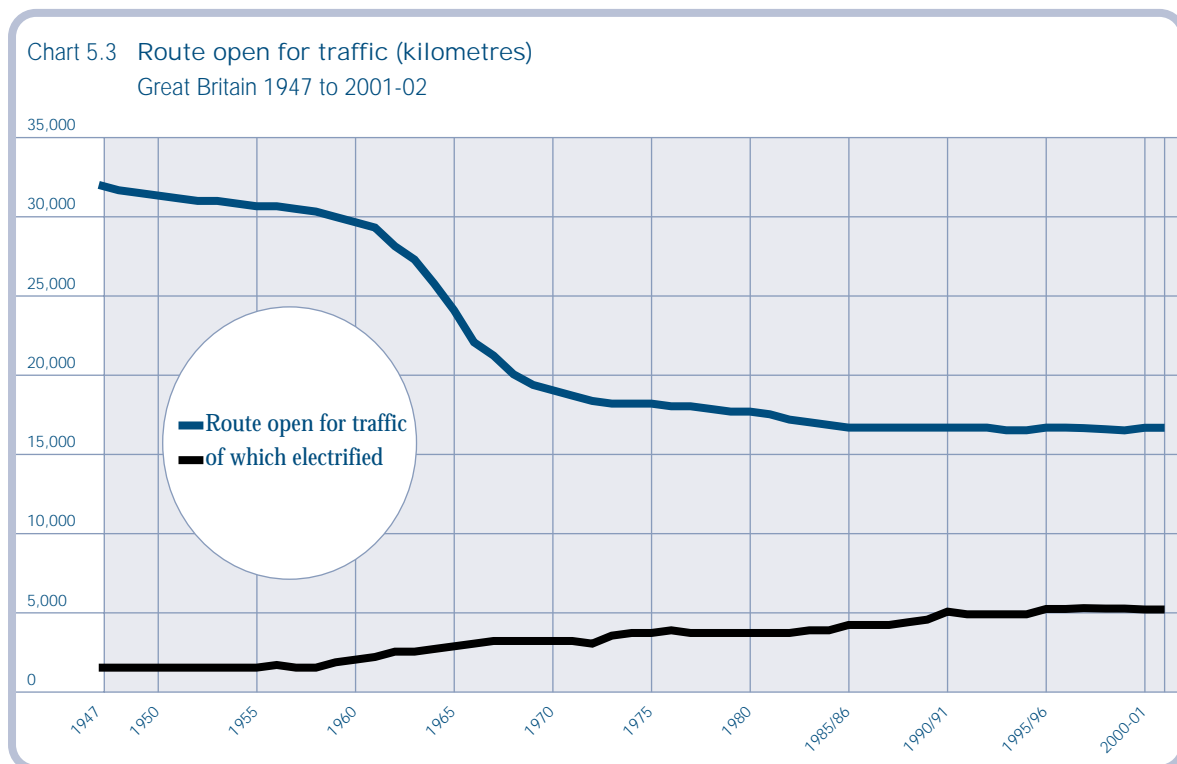


5.3 Infrastructure on National Railways

The length of route open for rail traffic is that managed by Railtrack. It does not include track managed by private railways or PTEs services operating on separately managed tracks. 26 kilometres of route were transferred to the Greater Manchester Metro Ltd in 1991-92.

The number of stations recorded between 1985-86 and 1987-88 includes eight stations which were sold to Brecon Mountain Railway Ltd in May 1989.

The number of stations shown from 31 March 1994 are only those owned by Railtrack. Eighteen other stations, mainly on the London Underground or not in regular use, are included in the figures for earlier years.



5. Miscellaneous tables continued

Table 5.3 Infrastructure (route kilometres and station numbers)
Great Britain 1985-86 to 2001-02

	Route Open for Traffic	Of which electrified	Open for passenger traffic	Open for Freight traffic only	Passenger stations
1985-86	16,752	3,809	14,310	2,442	2,385
1986-87	16,670	4,156	14,304	2,366	2,405
1987-88	16,633	4,207	14,302	2,331	2,426
1988-89	16,599	4,376	14,309	2,290	2,470
1989-90	16,587	4,546	14,318	2,269	2,471
1990-91	16,584	4,912	14,317	2,267	2,488
1991-92	16,588	4,886	14,291	2,267	2,468
1992-93	16,528	4,910	14,317	2,211	2,468
1993-94	16,536	4,968	14,357	2,179	2,493
1994-95	16,542	4,970	14,359	2,183	2,489
1995-96	16,666	5,163	15,002	1,664	2,497
1996-97	16,666	5,176	15,034	1,632	2,498
1997-98	16,656	5,166	15,024	1,632	2,495
1998-99	16,659	5,166	15,038	1,621	2,499
1999-00	16,649	5,167	15,038	1,610	2,503
2000-01	16,652	5,167	15,042	1,610	2,508
2001-02	16,652	5,167	15,042	1,610	2,508

Break in series for
number of
passenger stations
only (see notes on
page 37)

Source: Network Rail

5.4 Average age of rolling stock

Background

The average age of rolling stock is seen as an indicator of comfort on the railways.

Methodology

All rail vehicles on lease by Train Operating Companies (TOCs) from Rolling Stock Operating Companies (ROSCOs), and that run services pursuant to a Franchise Agreement with the SRA, are included in the calculations of average age.

The age of each rail vehicle is the time between the date of entering into service and the end of each quarter, e.g. a vehicle which entered service in January 2000 would, at the end of 2001-02 Q1 (30 June 2001), be 1.5 years old. The date of entry into service is deemed to be the first day of the quarter in which the rail vehicle came into service, e.g. all rail vehicles which entered service between 1 April 2001 and 30 June 2001 are given a service entry date of 1 April.

Where the date of entry into service is not available

(essentially for rail vehicles introduced prior to privatisation) the date used is either-

- 1 January in the year of manufacture of the relevant class of vehicle; or
- the midpoint of the period over which the relevant class of rail vehicle was manufactured, e.g. if a class of rail vehicle was manufactured over the time frame March 1972 to March 1976 then the midpoint would be March 1974.

A vehicle drops out of the calculations when its lease either expires or is terminated.

The average age is calculated by summing the individual ages and dividing by the number of rail vehicles in service.

Other comments

“Rail vehicles” excludes locomotives.

The refurbishment or other improvement of a rail vehicle is not taken into account in calculating average age.

Table 5.4 Average age of rolling stock
Average age in years 2000-01 to 2003-04

position at the end of:	Long distance operators	London and SE operators	Regional operators	All operators
2000-01 Q3	25.74	20.51	17.61	20.67
2000-01 Q4	25.99	20.70	16.91	20.64
2001-02 Q1	25.97	20.36	16.42	20.34
2001-02 Q2	25.26	20.43	15.89	20.13
2001-02 Q3	24.74	20.35	16.07	20.07
2001-02 Q4	24.89	20.40	16.11	20.14
2002-03 Q1	23.51	20.48	15.56	19.86
2002-03 Q2	22.33	20.50	15.69	19.67
2002-03 Q3	22.25	20.36	15.28	19.49
2002-03 Q4	22.29	20.01	15.48	19.36
2003-04 Q1	22.13	19.89	15.73	19.33

Appendix

1 National Railways

Up to 1994-95 covers services by British Rail. From 1995-96 covers both BR services and those provided by privatised passenger and freight operators (see Rail Privatisation below).

2 Rail Privatisation

The main components of the restructured industry are:

- 25 Train Operating Companies (TOCs) providing passenger rail services. These were set up in April 1994 as wholly owned subsidiaries of British Rail. The transfer of these TOCS to the private sector was completed in April 1997.
- Railtrack, which operates the infrastructure core of the railway system. It owns and operates the track and associated infrastructure such as signalling. It also owns stations, but most of these are leased to and operated by TOCs.
- Rolling Stock Leasing Companies (ROSCOs), who own and lease the domestic passenger rolling stock.
- Freight operations. The main rail freight operators are EWS (English, Welsh and Scottish Railway), Freightliner, who own the ex-BR domestic container business, DRS (Direct Rail Services) and GB Rail Freight.

3 Rail Sectors

The sectors used in sections 1 and 2 contain the following TOCs:

Long Distance Operators

Anglia Inter City*
 First Great Western
 Great North Eastern Railway (GNER)
 Midland Mainline
 Virgin West Coast
 Virgin Cross Country

London and South East Operators

c2c
 Chiltern Railways
 Connex South Eastern
 First Great Eastern
 Silverlink
 South Central
 South West Trains
 Thames Trains
 Thameslink
 West Anglia Great Northern (WAGN)

Regional Operators

Anglia Locals*
 Arriva Trains Merseyside
 Arriva Trains Northern
 Central Trains
 First North Western
 Gatwick Express
 Island Line
 ScotRail
 Wales and Borders Trains
 Wessex Trains

** Anglia Railway services are classified in Regional Operators where they cannot be identified as Inter City services*

4 Railway Periods

Train operators report figures in 'periods'. Periods are four weeks long, with 13 periods making an annual figure. Quarterly results require apportionment of these data.

5 Abbreviations and Symbols Used

P	Provisional
..	not available
---	break in series
PTE	Passenger Transport Executive
-	not applicable
r	revised data