



BRITAIN'S GROWING RAILWAY



National Rail

ATOC

ASSOCIATION of TRAIN OPERATING COMPANIES

THE RAILWAY'S SUCCESS STORY

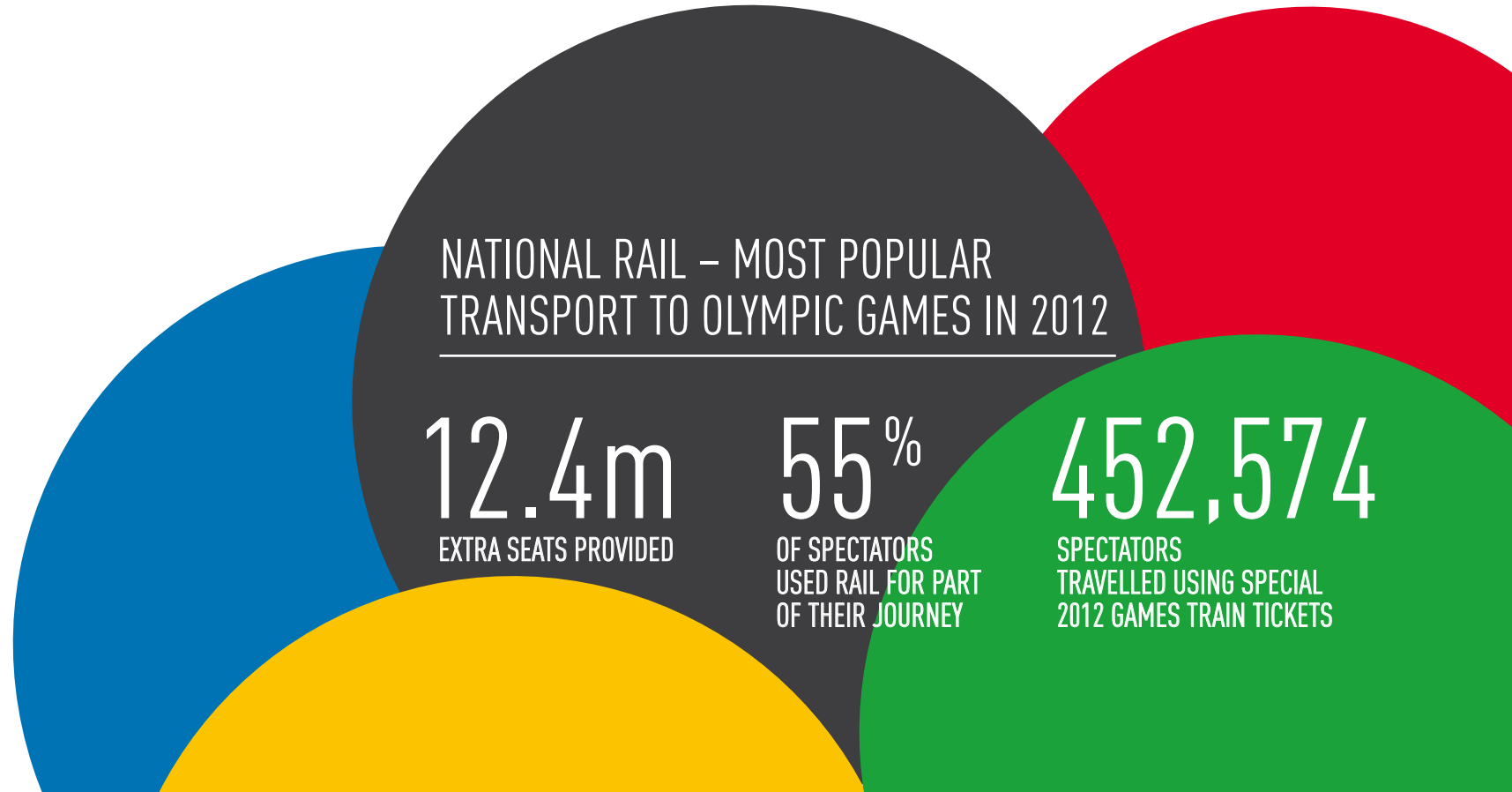
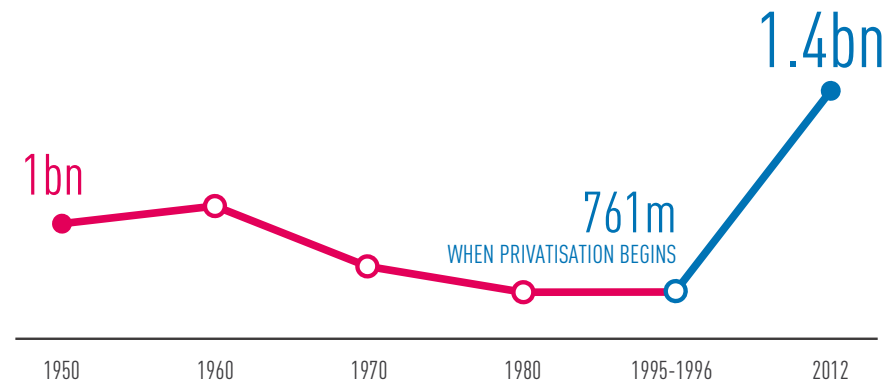
More and more people are choosing to travel by rail in Britain. Since privatisation, passenger numbers have grown by 82% with 1.4bn passenger journeys now made on National Rail services every year – the highest figures since the 1920s.

Such growth has been brought about thanks to more investment in our railways than ever before – meaning new trains, better stations, an increase in services and good-value fares. Recent years have also seen historically high levels of punctuality, with over 90% of trains now arriving at their destination on time.

A rise in passenger numbers also means a rise in the revenue generated by train companies, who are now able to make a net annual contribution of around £200m to the government.

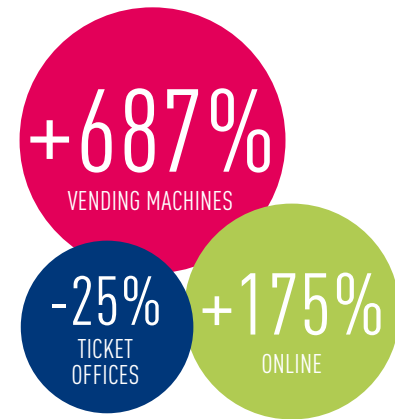


NATIONALISATION
COMPARED WITH
PRIVATISATION
PASSENGER JOURNEYS PER YEAR



FARES & FUNDING

TRENDS IN TICKET BUYING OVER LAST 10 YEARS



REAL TERMS INCREASE IN FARES

LAST 15 YEARS
OF BRITISH RAIL **2.2%**

FIRST 15 YEARS
AFTER PRIVATISATION **1.3%**

"THERE ARE ONLY TWO PLACES THAT MONEY FOR RAILWAYS CAN COME FROM. IT CAN COME FROM THE TAXPAYER OR IT CAN COME FROM THE TRAVELLER."
Rt Hon David Cameron MP, Prime Minister, January 2012

Running the railways costs around £11bn every year, and how that is funded remains a government decision. Successive recent governments have decided that railway funding should come from the fares paid by passengers, and not the taxpayer. As such, passengers quite rightly expect a good deal – and even better services. The railways also have their part to play, and have been tasked by the government to achieve a 30% reduction in costs by 2019. The government wants to use these savings to stop above-inflation fare rises in the future.

The fares system has seen significant improvement over the past decade, and passengers in Britain now have more choice over how and where they buy their

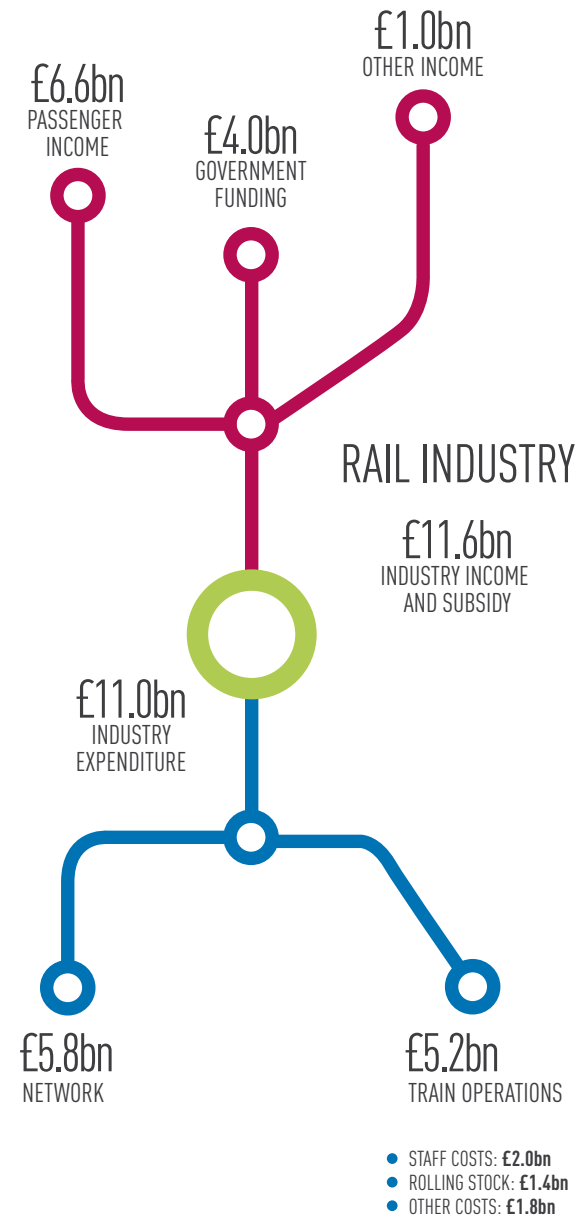
train tickets than in any other country in the world. Good value Advance fares are particularly popular amongst passengers, and have more than doubled in availability since the railway was privatised – with almost a million tickets now sold every week.

New technology has made a huge difference. More passengers than ever before are buying tickets online, with their mobile phones, or through ticket machines at stations. Train companies are planning to make life easier for passengers, thanks to innovations that make it easier than ever to find the best value ticket for their journey – such as greater use of smartcards and clearer, easier to understand information on a redesigned 'orange ticket'.

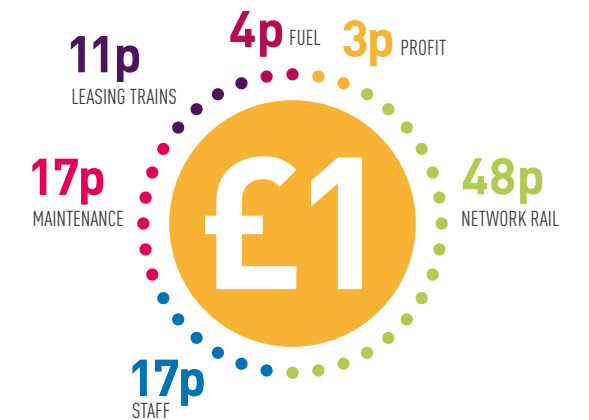
AVERAGE COST OF SINGLE JOURNEY



WHERE DOES THE MONEY GO?



HOW EVERY £1 RECEIVED BY TRAIN COMPANIES IS SPENT



INVESTMENT

The Government has confirmed investment plans for the railways worth over £9bn between 2014-19, to provide:

Electrification – for faster and more environmentally friendly journeys on newer, quieter trains

The Northern Hub – supporting our regional economies, and delivering more seats and better journey times

More capacity for commuters – an additional 120,000 journeys into and out of London every day, with significant additional capacity via Crossrail and Thameslink, plus an extra 20,000 journeys into regional cities

Better long distance journeys – by investing in improvements on the East Coast Main Line, Midland Main Line and Great Western Main Line, with new signalling, new trains and extra capacity

PASSENGER CHOICE

With more and more people choosing rail, train companies are expanding the range of services they offer. Whether you want to get your ticket sent to your phone or collect it at the station, watch an on-board movie or work on the go, a wide range of improvements are being delivered now, or are planned for the future.

THE STUDENT PASSENGER

- A 16-25 Railcard offers 1/3 off the price of a ticket
- Study at your seat or watch an on-board movie using WiFi on the train
- Get your ticket sent directly to your phone
- Order bike hire or bus tickets for onward journeys
- Use the Best Fare Finder online to get the cheapest fare available



EASIER TRAVEL FOR THE OVER 60s

- A Senior Persons Railcard offers 1/3 off the price of the journey
- Research travel options online or by calling National Rail Enquiries
- Check out the great range of 2 for 1 deals available for attractions all over Britain at daysoutguide.co.uk
- PlusBus cards offer good value travel on local bus services when you reach your destination



BETTER BUSINESS TRAVEL

- Check your emails, videoconference and get access to online documents with improved mobile phone coverage and on-board WiFi
- Keep up to date with changes to your journey and onward travel using Twitter, travel apps or National Rail Enquiries via your Smartphone, tablet or laptop – so you can be confident you'll make your meeting on time
- Concentrate on work, on-board faster, more comfortable trains
- A rail miles scheme could allow you to collect points and rewards for each journey you make



HASSLE-FREE FAMILY GETAWAYS

- A Family & Friends Railcard gives you 1/3 off the cost of tickets
- Advance fares, available 12 weeks ahead of travel, offer great savings for families travelling together
- At your destination, relatives collecting you from the car park can set an alert on their National Rail Enquiries Smartphone app so they know if your train is running on time

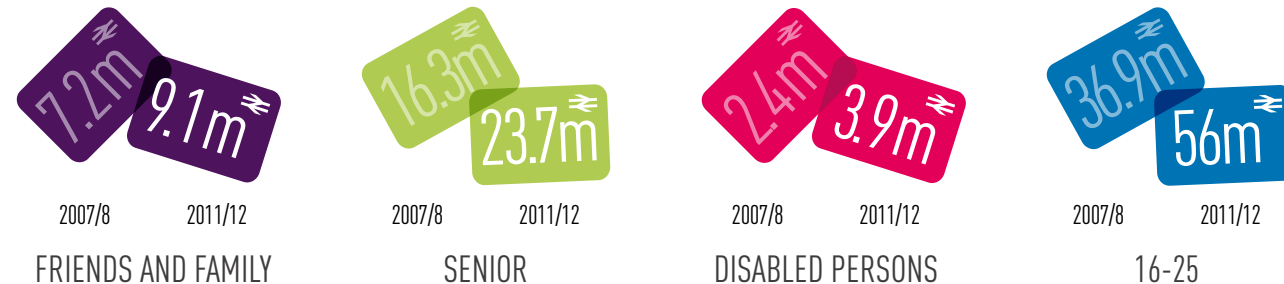


A SMARTER COMMUTE

- Smart ticketing technology rolled out across National Rail will allow for the introduction of new flexible season tickets
- With GPS tracking your train, check how it's running before you head for the office
- Paper ticket or smartcard no longer required – touch through barriers with a Smartphone e-ticket, and track journeys end-to-end
- As it pulls into the station, smart technology could tell you where to stand on the platform to ensure you travel in the least crowded carriage



GROWTH IN JOURNEYS MADE USING RAILCARDS



THE NEXT STEPS

Significant growth has been achieved over the past decade, but the railways need to change in order for this to continue. Changes are already underway – with longer franchises and a targeted and sustained rail investment programme announced by the government. But a more flexible franchise system, smarter rules about how Network Rail and train companies work together, and a much lighter touch to regulation are also required to allow the railways to thrive.

The challenges ahead include the introduction of more modern working practices, a smarter fares policy for passengers, and ensuring that the railways achieve agreed efficiency targets.

And all of this needs to be delivered alongside maintaining record levels of passenger satisfaction, and the best safety record in Europe.



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