TAS National Fares Survey 2013

The TAS Partnership Limited
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The TAS Partnership Limited
Passenger Transport Specialists

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Executive Summary

1.1 Foreword

The TAS Partnership Limited is pleased to present its third National Fares Survey, which seeks to benchmark bus fares within Great Britain. This report follows surveys completed in 2009 and 2011 and covers all GB regions and major bus operating groups.

The 2013 study has been part funded by Passenger Focus as well as two of the major operating groups; this has not influenced our sampling frame, analysis or reporting method. We would like to offer our thanks to all operators who have provided fares data.

1.2 Our Approach

A total of 994 individual adult single, day and weekly bus fares have been analysed in this survey for typical bus journeys of approximately three miles, based on a target sample of 1,000. These were obtained from a comprehensive survey of single, day and weekly fares between May and July 2013. All fares were taken to be peak versions and off-peak pricing was disregarded.

For the first time, the statistical 'median' has been used for analysis (and, where historical comparison is required, has been applied to previous surveys), with the intention of removing extremes within these data and developing a close proximity to an 'actual fare' within the large dataset.

1.3 Key Findings

Adult Single Fares: The average median single fare has increased by 5% between 2013 and 2011, compared to an average increase in mean and modal fares of over 11% over the same period. The distribution (or spread) in single fares has increased between both surveys, showing a wide variation in fare for a typical three-mile bus journey:

- The minimum fare was £0.80 (up from £0.70 in 2011);
- The average (median) fare was £2.00 (up from £1.90 in 2011); and
- The maximum fare was £5.00 (up from £3.85 in 2011).

Day and Weekly Tickets: Whilst the average ticket value has increased between the 2011 and 2013 surveys:

- The *day-to-single fares ratio* (and distribution around the median fare) of day tickets has **decreased** indicating a close approximation to the value of two single fares (the typical return journey);

- Both the *week-to-single,* and *week-to-day* fares ratios are largely consistent between 2011 and 2013, although the distribution of weekly ticket values around the median value has increased. Most customers continue to benefit from potential journey savings on the fourth day (or eighth single trip) of travel during an average five-day week.

Operating Market: The median single fare and day ticket has increased across successive surveys for all markets included within our analysis; in most cases, the cost of weekly tickets has followed the same trend, except for the PTE market where there has been no change in the median cost of a weekly ticket between 2011 and 2013. The Interurban market has the highest and lowest single fares values of the 2013 survey data, following a trend from the previous three surveys of offering the lowest discount – and savings potential – for customers using day and weekly tickets compared to single journey equivalent tickets. Customers within London generally get the better savings on day tickets compared to single tickets, whilst PTE customers in both urban and non-urban markets get better savings on weekly tickets compared to single tickets.

Region: The median single fare has increased for all regions across all three TAS fares surveys. London has the highest median single fare, Scotland the lowest and the Yorkshire/Humber region has the greatest range of single fares and the individual highest fare in the survey. Median day and weekly ticket prices in GB regions have generally risen across all three surveys. Customers in North West England, on both urban and non-urban services, typically see savings for such purchases against the cost of single trip purchases on the second journey on day tickets, and sixth/seventh journey on weekly tickets, whilst customers purchasing day tickets in the North East and South East of England typically pay a premium on day tickets.

Operator: The median single fare has increased for all operators between the 2011 and 2013 surveys. Transdev has the highest median single, day and weekly fare values amongst all operator groups. The Municipal operator group has the lowest median single and day ticket values, whilst Stagecoach has the lowest median weekly ticket values. National Express offers the smallest range of single fares covering its operations in the West Midlands and Scotland. Independent operators have the highest range of single fares nationally and of any region (Yorkshire/Humber). Customers purchasing Arriva and First day tickets generally tend to start making savings against the cost of single trip fares on their second journey of the day; for Stagecoach customers, savings accrue on the seventh journey for weekly ticket purchases, ahead of the national average as determined by the 2013 analysis.

Economy

- Whilst the cost of a median single bus fare may have risen by over 5% (two years) and 11% (four years), the increase is less than two national economic indicators (RPI of 7.3% and CPI of 5.4%). The increase is also less than comparable figures for national rail fares and motoring costs (particularly diesel cars) during the same period.

- A national correlation can be seen between the lowest fares, population density and greatest bus use, particularly in the PTE areas, with Scotland and North West England being exceptions. In addition, a north-south divide emerges between car ownership and estimated bus use, with those in south GB having greater car ownership and using the bus less than their northern counterparts.

- In comparing the cost of bus fares with cost trends from other forms of passenger transportation, we note that whilst diesel car and national rail fares have seen increases above bus use, petrol car and taxi/private hire vehicle (PHV) costs have seen increases below that of bus use. This is a potentially significant area for concern for the bus industry in its attempts to encourage modal shift, and reduce the environmental impact of, the GB road passenger transport sector.

1.4 Conclusions

Our conclusions from the 2013 survey data suggest that, whilst the average cost of bus travel has increased over the past two years:

- The increases are, on average, less than those experienced in the wider national economy and in comparable modes (diesel car and rail);

- The 'discount' potential of weekly tickets is self-evident, with most customers being able to make savings against the cost of single-trip journeys on their fourth day (or eighth trip) of an average five-day week. Day tickets are becoming a *de facto* proxy to two single fare journeys and may, in time, replace the typical return fare offered by operators;

- There is a suggestive "north-south" split in the value of fares for a range of demographic analyses, with lower average fares in areas characterised by urban networks, high population density and low levels of car ownership.

Despite the ongoing reduction in bus service support (concessionary fares reimbursement, BSOG and supported services themselves), it is still too early to draw a correlation between these factors and increased fares and ticket prices in the bus industry. However, given that the increases are less than those experienced in other transport (and economic sectors) to date, we anticipate that the effects of reduced support will be experienced between now and the next National Fares Survey.

Introduction and Objectives 1

1.1 Introduction

1.1.1 This is the third National Fares Survey and it aims to benchmark bus fares within the UK, covering all regions and major operators. It is the only study of its kind and scope, providing comprehensive analysis of variation between regions and operators, as well as comparing average fare levels over time from our first study in 2009 and the previous survey of 2011.

1.1.2 In order to determine the level of bus fares charged in the UK in 2013 (late May to early July 2013) TAS undertook a comprehensive survey which included single fares and day and period tickets. We aimed, as far as possible, to obtain fares detail for the same services as in 2011 and we were broadly successful although roughly equivalent services were substituted if networks had changed. Since the 2011 survey, First has undertaken a programme of asset disposal; this survey contains data from services run in Northampton operation which have since ceased operation during the production of this report.

1.1.3 The 2013 study has been part-funded by Passenger Focus and two of the major UK transport groups. We must stress at the outset of this report that the funding arrangement has not influenced our choice of sample fares, nor our subsequent analysis thereof, which remains entirely objective.

1.2 Objectives

1.2.1 This study concentrates on the main fares offered in order to compare fare levels and analysis has been undertaken by operating group, region and area type. All fares were taken to be peak versions and off-peak pricing was disregarded. The main types of fares analysed are:

Adult Single Fares

- Chosen to represent 'typical' three-mile bus journeys as purchased on bus from the driver in a variety of areas;

Day Tickets

- Chosen to be the *least expensive ticket* equivalent to the journey's single fare which can be purchased on-bus; in some cases this is a multi-operator product. Day tickets were not available for: Stagecoach West Scotland (Lockerbie area); Lloyds Coaches on service T2; Hebridean Transport; and John Leask & Son;

Weekly Tickets

- Chosen to be the *least expensive area ticket* which can be bought on-bus, equivalent to the journey's single fare; discounts for off-bus purchases were disregarded. Weekly tickets were not available for: Stagecoach Lincolnshire (Boston area); Lloyds Coaches (for journeys between Dolgellau and Bangor); Hebridean Transport; and John Leask & Son.

- Some operators sell point-to-point weekly tickets on bus but we have disregarded these in order to make consistent comparisons between operators and with previous surveys.

1.3 Our Approach

1.3.1 Our aim was for a sample of 1,000 fares (a broadly similar number to the 2011 study) and to include a sample size for each operating company relative to its fleet size. For operators with a very simple fare structure this meant including repeated examples of the same fare value (for National Express West Midlands we included 55x£2.00 fares, for example). The exception to this is London, where we had a small number of fares purely to include London values for comparative purposes (our market and regional analyses).

1.3.2 All sample fares were valid in the time period between the end of May and early July 2013. We acknowledge that any fare increases during this period might skew the results when comparing one operator with another. All fares are taken as the value paid on bus at peak times, with discounts for online or other pre-purchase methods and off-peak travel discounted. All fares quoted are unadjusted outturn values for comparison with previous surveys.

1.3.3 A significant change in the 2013 survey compared to in 2009 and 2011 is the statistical use of 'average'. Of the three common forms of data average (the mean, the median and the mode), previous surveys have adopted the mean (i.e. the sum divided by the number of data entries). For this survey, we have adopted the median (i.e. the middle value of an ordered range) as our chosen statistical average – the principal benefits of which are:

- the median generally represents an 'actual' fare value, i.e. what an operator would charge and what a customer would pay on bus;

- in most cases (particularly with large datasets), the median can be very close to the mean;

- it removes the inclusion of 'extremities' within the data which may skew analysis (for example, an operator may have 20x£1.00 fares, but 1x£5.00 fare, the latter causing the skew).

1.3.4 As noted in the 2011 survey, it remains surprising that, despite substantial investment by the industry in fleet and services, fare values for single journeys remain largely unpublicised – low-tech publicity for the industry. For this survey, as in previous years, we have only obtained sample fare tables from most operators by formally requesting them – thus, the more we were able to use, the more accurate the overall data. We therefore thank all of those operators for the supply of fare tables and credit the minority of operators who already publicise fares in detail.

1.4 Report Structure

1.4.1 Our report is structured as follows:

- **Section 2** describes the historical perspective of bus fares and provides some background on changes in ticket types used by passengers between 2000 and 2013;
- **Section 3** (single fares) and **Section 4** (day and weekly tickets) provides our headline analysis and overall findings from the 2013 survey sample data;
- Subsequent sections of the report analyse grouped characteristics of the data:
  - **Section 5** considers variations in fares for different operating markets;
  - **Section 6** provides analysis by GB region (based on the former Government Office Region, GOR, boundaries); and
  - **Section 7** considers variations by bus operator and ownership group.

1.4.2 **Section 8** provides economic and demographic context to interpretation of the fares data, including comparison with alternative (competing) modes to the bus;

1.4.3 The report concludes (**Section 9**) with an evaluation of the survey; our observations on future fares trends and developments; and our overall conclusions.

Background to Bus Fares and Ticketing 2

2.1 Introduction

2.1.1 This section of the report summarises the key concepts relating to bus fares and the historical perspective of their evolution. We supplement this with observations on the factors influencing bus fares from 2000 to 2013 and comment on potential future developments, including ticketing technologies.

2.2 General Bus Fares Concepts

2.2.1 There are many different ways in which bus fares can be determined: Table 1 summarises the four most common approaches. The least complicated fares are flat fares where there is one basic fare for boarding a bus, no matter what distance is travelled.

2.2.2 Fare determination relative to distance is rarely straightforward and can be determined as much by market forces and past precedent as by actual distance. Zones are rarely similarly sized but are generally attempts to include a distance related element while taking account of travel patterns and catchment areas.

Table 1: Bus Fare Concepts

Fares Concept	Description
Flat Fare	One basic charge for boarding a vehicle, no matter what distance is travelled
Zonal Fare	The network (or route) is divided into geographical zones with charges set for travel within one/combination of zones
Distance-Based Fare	The fare charges rises in line with the length of the journey (similar to Taxi/PHV charging)
Time-Based Fare	Customers buy a ticket which entitles them to travel as many times as they like for a defined period of time

2.3 GB Fares – Historical Perspective

2.3.1 The evolution of the British bus industry has had significant influence over how bus passengers are charged today, and by how much, possibly to a greater extent than may have been anticipated following deregulation of the industry outside London in 1985 and the removal of fares details from operating licence particulars in 1980.

The Transport Act 1930

2.3.2 Fares provisions were attached to Road Service Licences under the provisions of the Transport Act 1930, which remained a requirement until being repealed fifty years later by the Transport Act 1980. Proposed increases or changes to fares had to be submitted to the Office of the Traffic Commissioner who had the authority to agree to, or reject, such proposals. Given the rapidly changing rates of inflation during this period to the 1970s, this became an extremely bureaucratic process, particularly during the pre-computer era.

2.3.3 Not only were mileage scales applied rigorously (and often challenged by local authorities) but checks were applied to ensure that all feasible routes linking A and B (direct from A to B and those from A to B via C) charged the same fare. Such route variations, such as journeys diverted via factories at works times, would usually have their own fares table. Great efforts were made in a number of areas to ensure that different operators charged the same fares between common points. Smaller operators were often forced to come into line with increased fare levels set by the bigger companies over common sections, whether the operator sought a fares increase or not. This is in stark contrast to the reality of competition law today, and consumer expectations of a single bus fare from A to B.

2.3.4 The 1930 Act created the conditions for a number of variations that marked the operations of "Corporation" (public) and "Company" (private) operators, as summarised in Table 2.

Table 2: Variations between Corporation and Company Bus Operations

Condition	'Corporation' Operator	'Company' Operator
Sector	Public (municipal) sector	Private sector
Network Density	High density networks (high passenger volumes over relatively short distances)	Low density networks (passenger traffic dispersed over wider range of services and operating territory)
Network Maintenance	Expectation of form of 'social dividend' of less well used services but no expectation of cross-subsidy	Expectation to maintain complete networks, resulting in high average fares to cross-subsidise loss-making routes
Fares Structure	Simple, low cost fares structures	Tapered fares scale (i.e. £/mile reduces in relation to the distance travelled)
Supplement	Obtained through surcharge from private operators	"Protective fare" surcharge levied to protect local (Corporation) operator

2.3.5 Unprofitable bus services are not a purely post-deregulation phenomenon, as shown by the following example of the extent of cross-subsidy required under the old regime:

- In 1963, 70% of all services run by Bristol Omnibus failed to cover their costs;

- By 1976, the situation had worsened to the extent that Bristol Omnibus notified the City Council of a likely £1.1m deficit on City operations in the year.

2.3.6 One consequence of the 1930 Act was that innovation in bus fares, types and ticketing was stifled. While most operators offered single and return fares, early forms of carnet (multi-trip ticket) were issued by most operators but only for journeys between specified points. Area-wide tickets, if they existed, were often priced at the higher-end of the fares scale and aimed at day-trippers or the seasonal, holiday market.

2.3.7 Although the 'day ticket' was not particularly common until more recent years, London had the earliest example for its tramways which, at the time, were in competition with buses. London has continued to develop its day and period ticket range over the years, initially restricted to one mode of transport before evolving to become multi-modal. Such initiatives have been borne from the different regulatory regimes that exist in London compared to the rest of Great Britain

2.3.8 Conversion of services to one person operation (OPO) led to simplification of fare types with a removal of multi-journey tickets sold by drivers and many return fares. Point-to-point season tickets remained available at company offices, which at the time were widespread and found in most towns and cities. However, the legislative background usually prevented any simplification of fare values, leading to long boarding times.

The Transport Act 1968

2.3.9 Following the 1968 Transport Act and widespread nationalisation of the bus industry, two types of organisation were established which had a further significant impact upon fares policy:

- the National Bus Company (NBC) and Scottish Bus Group (SBG) as nationally owned and managed entities; and

- the Passenger Transport Executives (PTE), consisting of groupings of corporation bus operations maintained under local government control.

2.3.10 Whilst NBC initially retained the fares scales established by constituent company operations, it began to set different levels for fare increases in urban and rural areas. Over time, journeys in rural areas grew to cost significantly more than their urban equivalents. SBG was an early adapter of the "all fares above £1 increase by 10p" type of increase, with such increases imposed centrally. It was true, however, that SBG fares in rural areas were significantly higher than in the urban areas.

2.3.11 PTE fare policies developed over time but in different directions. Most PTEs introduced heavily discounted "travelcard" schemes covering all operators: an example later followed by London. This was accompanied by the simplification of fares together with a pronounced fares taper, so that longer journeys cost much less per mile. Some PTEs also introduced very low off-peak maximum single fares. Whatever the exact policy on fares, by 1986 a high proportion of public spending on buses by the PTEs went towards subsidising low fares for passengers. NBC operations in some Shire counties – notably Avon, Cleveland, Derbyshire and Lancashire – also adopted a policy of subsidising lower fares for passengers and travelcard schemes prior to 1986.

2.3.12 The exception to the general rule within PTEs was South Yorkshire, which had a policy of freezing fare levels while retaining traditional complex fare structures. At the time of deregulation, fares in South Yorkshire remained at early 1970s levels.

The Transport Act 1980

2.3.13 The Transport Act 1980 removed fares detail from licensed particulars. This led to the beginning of the availability of area tickets and the start of the move towards issuing such tickets on-bus, although there remained some resistance to this and a continuing tendency toward pricing based on higher fare levels. Prior to planned deregulation of the bus industry outside London in 1985, local authorities continued to exercise a high degree of influence over fare levels and increases as part of their revenue support agreements.

The Transport Act 1985 – Impact at Deregulation

2.3.14 The new commercial operators at deregulation faced a number of issues. Fares in the shire areas were generally already set at levels where the viability of services could be readily established. Local shire authorities then normally specified fares on contracted services at the same level as those charged by commercial operators.

2.3.15 In PTE areas however, the operators were not only faced with the need to impose very large fare increases in order to approach market levels, but there was also uncertainty regarding the future of (and income from) travelcard schemes. As an example, Yorkshire Traction imposed a 250% increase in South Yorkshire. While such increases brought fares up to 'market' levels – usually still below those in shire areas – increases of such large magnitude had an obvious negative effect on patronage. Some PTEs also imposed (and continue to impose) their own fare scales for secured services or journeys which differed from commercial fare levels.

2.3.16 Two of the expected effects of deregulation were that competition on the basis of fares would be the norm and that operators would set different fare scales on different routes. In the event, competition on the basis of fares has been

comparatively rare, while different fare scales on different routes are almost unheard of.

2.3.17 A side-effect of deregulation and privatisation was that in order to reduce overheads many 'backroom' and administrative staff were made redundant. This included many of those with fares responsibilities. Therefore since deregulation, fares increases have steadily moved away from distance-based fare scales and now fare increases are more usually in the form of 'fares below £1 increase by 5p; between £1.01 and £2 by 10p etc.' Electronic ticket machines (ETM) have also allowed operators to analyse data in order to establish where particular fare changes would be most productive.

2.3.18 In both cases, however, the structure of single fares which had existed prior to deregulation was retained. Thus areas with a more marked fare taper before deregulation have generally stayed that way and areas which were previously considered to be 'high fare' areas have retained this distinction.

The Modern Era

2.3.19 The principal change in bus fares has been the huge expansion in the range and availability of day and weekly tickets purchased from the driver. This has been driven by four main factors:

- **Simplicity** – it is a relatively simple product ("day" or "week") for a bus operator to market and monitor;
- **Loyalty** – once purchased, consumers are restricted to one operator's services;
- **Competition** – it is far easier to respond to a competitor's lower fares by introducing a low-priced weekly tickets rather than revised many different fares;
- **Cash Flow** – on bus sales became essential as travel offices and other retail outlets off bus gradually closed down.

2.3.20 Bus companies in many urban areas introduced weekly tickets during the 1990s that were significantly lower in price than the previous products. These were aimed both at gaining market share in the face of competition and generating new traffic among customers who were discouraged from purchasing period tickets until then due to their high price. This strategy was arguably the most successful for Stagecoach, notably in Manchester, where the low cost Megarider tickets contrasted sharply with the high single fares generally prevalent in the area on all operators. Another key selling point for the Megarider and similar tickets was the ability to purchase the ticket on-bus at any time.

2.3.21 Current pricing trends continue to encourage the sale of day, weekly and longer period tickets as opposed to single and return tickets. The trend

towards day and period tickets is being encouraged by bus operators through the pricing structure, where the multiple between the average single fare and day and weekly prices is constantly reducing. This trend away from adult single fares is shown in Table 3, which is based on the DfT's surveys in England.

Table 3: Ticket Type Changes 2000-2009[1]

Type of Bus Ticket	2000 and 2001	2007 and 2008	2008 and 2009
Cash Fare on Bus	42%	20%	15%
One-day Bus Pass	5%	7%	6%
Bus Pass Valid for More than One Day	18%	18%	19%
Student or Discount Permit	2%	1%	1%
Travel Pass Valid for More than One Day (Rail or Metro and Bus)	10%	8%	14%
OAP, Elderly or Disabled Concessionary Permit	21%	25%	26%
Other (Including Smartcard)	3%	21%	19%
Total	**100%**	**100%**	**100%**

2.3.22 There have been some attempts to simplify single fares, notably Brighton & Hove's adoption of a single fare and Go North East's introduction of some single value fares within set areas, but by and large operators have not found such restructuring to be worthwhile, although there has been a general move towards establishing fares in multiples of 10p.

2.3.23 Notwithstanding this, over time fare levels have responded to their markets such that levels are often lower in less affluent areas (e.g. Bradford vs. Leeds or South Shields vs. Newcastle) and sometimes this principle even applies at route level.

2.4 Future Fares: The Role of Technology

2.4.1 The modern era has seen unprecedented developments in ticketing technology. Set against other service industries – and the adoption of chip-and-pin card systems and cashless transactions – the UK bus industry has been relatively slow to migrate towards new types of payment system. It is only really now beginning to see the wider benefits of smartcards and their potential role within CRM (customer relationship management).

Hardware

2.4.2 Ticket issuing hardware has always posed limitations on ticket types. In the 1970s and early 1980s many urban operators used 'Ultimate' ticket machines

[1] Source: DfT Public Transport Statistics Bulletin 2009

which issued simple pre-printed fixed value tickets; these were quick and efficient but not geared towards multi-trip tickets. Other machinery failed to keep pace with inflation and could often issue a maximum 99 pence ticket.

2.4.3 Operators who opted for exact fare systems have experienced self-imposed problems as a result. Some use these systems to accept payment for the full range of tickets while others limit ticket types and refuse to accept banknotes.

Smartcards

2.4.4 The more recent growth of smart ticketing has, so far, generally not led to any significant change other than to the selling mechanism of tickets. Smartcards offer the opportunity for a huge range of tickets where the hardware, rather than the driver, records use and checks validity. This in itself, however, makes marketing more difficult and there is a balance between flexibility and simplification of information.

2.4.5 Overall, existing products are being transferred over to smartcards – or, more often, there is a smartcard option, with improved ability to buy online. This has further been enhanced by the development of mobile ticketing (or M-Ticketing), which is now more widely adopted.

2.4.6 Smartcards are often hindered by the purchasing and renewal process. In many cases both renewal and purchase revert to travel offices or online renewal and there is usually a significant delay between sale and validity, although again there are exceptions – for example at Cardiff Bus weekly tickets can be loaded onto its 'iff' cards on bus. Usually, operators offer some level of discount for purchasing smart versions of tickets. The level of this discount varies significantly.

2.4.7 There are exceptions which buck the trend. One particular innovation is the offer of carnet-style tickets (such as Nottingham's Easyrider Anytime) while trentbarton's MANGO smartcard suite provides a range of discounts including a 25% discount on adult and child single cash fares. Mango is also unique on UK buses in using a touch-on and touch-off system. A number of operators offer a multiple of day tickets at a discounted price.

2.4.8 Overall, the most consistent factor surrounding the smartcard product is inconsistency. It will be a brave operator which withdraws all of its traditional ticket sales methods in favour of the smart platform, as TfL plans to do on all buses in London.

Mobile Ticketing and Wireless Ticketing

2.4.9 M-Ticketing, Near Field Communications (NFC) and EMV contactless bankcard payment are fast competing with smartcard systems and are now the emerging and dominant players in the ticketing revolution. Mobile ticketing has been adopted by a growing number of operators. Arriva has long paved the way forward in this regard and the group offers a 10% discount on '4-

Weekly Saver tickets' via m-ticketing. As reported by Passenger Transport magazine, sales of daily, week, four-week and annual m-tickets continue to grow rapidly; and in 2013, the group expected that around two million m-tickets would be sold, nearly double the 2011 figure, with the mobile share of four-week tickets expected to increase from 16% to 25%.

2.4.10 Go-Ahead has also long been exploring and innovating in these areas, with m-tickets available at Brighton & Hove and Wilts & Dorset subsidiaries. Outside the PLCs, Velvet Bus, Cardiff Bus and Lothian Bus are among the growing number of operators to offer m-ticketing. Meanwhile, Stagecoach Group has launched the UK's first mobile contactless ticketing trial in 2012 in Cambridgeshire. In London, commuters can already use contactless bank cards on buses while FirstGroup announced that it plans to deliver EMV across its English bus operations.

The 2013 Survey: Single Fares 3

3.1 Introduction

3.1.1 This section focuses on the 2013 survey sample data, specifically our headline analysis of adult single fares from GB bus operators. The single fares analysis takes fare information at route level for each major operator group in GB.

3.1.2 Our objective was to achieve and analyse a sample size of 1,000 adult single fares from bus operations across Great Britain, to provide comparison with previous surveys in 2009 and 2011. The sample we managed to obtain was 994 fares from across the UK between May and July 2013.

3.1.3 For the purposes of this study, operators are grouped as follows – Arriva; First; Go-Ahead; Independent (private operators and small groups); Municipal (publicly owned operators); National Express; Stagecoach; and Transdev.

3.2 Our Approach

3.2.1 All journeys selected for the single fares survey were three miles long starting from an urban centre (town or city) and measured along the line of route rather than a straight line ('birds eye') measurement. Each sample journey was then assigned an area type (urban or non-urban); market type; operating group; and region for further analysis, as summarised in Table 4:

Table 4: Survey: Breakdown by Analysis Category

Area	No.	Market	No.	Operator	No.	Region	No.
Urban	**769**	City	**180**	Arriva	**156**	East	**68**
Non-Urban	**225**	Inter-Urban	**237**	First	**251**	East Midlands	**62**
		London	**4**	Go-Ahead	**83**	London	**4**
		PTE	**347**	Independent	**64**	North East	**65**
		Shire	**226**	Municipal	**70**	North West	**155**
				National Express	**66**	South East	**134**
				Stagecoach	**280**	South West	**85**
				Transdev	**24**	West Midlands	**110**
						Yorkshire/Humber	**95**
						Scotland	**123**
						Wales	**42**
Total	**994**	**Total**	**994**	**Total**	**994**	**Total**	**994**

3.2.2 The following points arise from the survey data:

a) few operators have set distances between fare stages;

b) depending on fare stage structure used, some fares may cover journeys up to five miles. Three-mile fare stages from a town centre to a more rural fare stage might not be a typical journey; however, the route will often pass through residential areas that would pay the same fare. For the purposes of this survey, these data have been included;

c) some single fare prices at the lower end of the price range will be 'held down' because there is a more direct service covering the same journey. Bus industry convention generally holds fares for any journey between A and B at the same level regardless of route taken.

3.2.3 It is illustrative of the current market penetration of day and weekly tickets that the majority of three mile journeys have an equivalent area-based day and weekly ticket. Out of 944 journeys, only 16 (1.61%) lacked an equivalent day ticket, and 10 (1.01%) lacked an equivalent weekly ticket – see **Section 4** for further analysis.

Statistical Analysis

3.2.4 We have used the median average single fare during our analysis of the 2013 data (see paragraph 1.3.3) in contrast to the two previous surveys which have used the mean average for comparison. This is largely to replicate 'actual' fare values that a consumer would be expected to pay and to remove any extremes within the data sample for subsequent analysis (i.e. by market, region and operator group). The median average has been applied retrospectively to 2009 and 2011 data to enable trends analysis.

3.3 Key Findings

Overall Results

3.3.1 Table 5 summarises the statistical average data that can be extracted from both the 2013 and 2011 surveys (includes, mean, median and modal fares). Both the mean and mode of the survey data indicate an increase of over 10% in real-terms between 2013 and 2011; the median indicates an increase of over 5%, suggesting that higher end fare values have increased proportionately during the period.

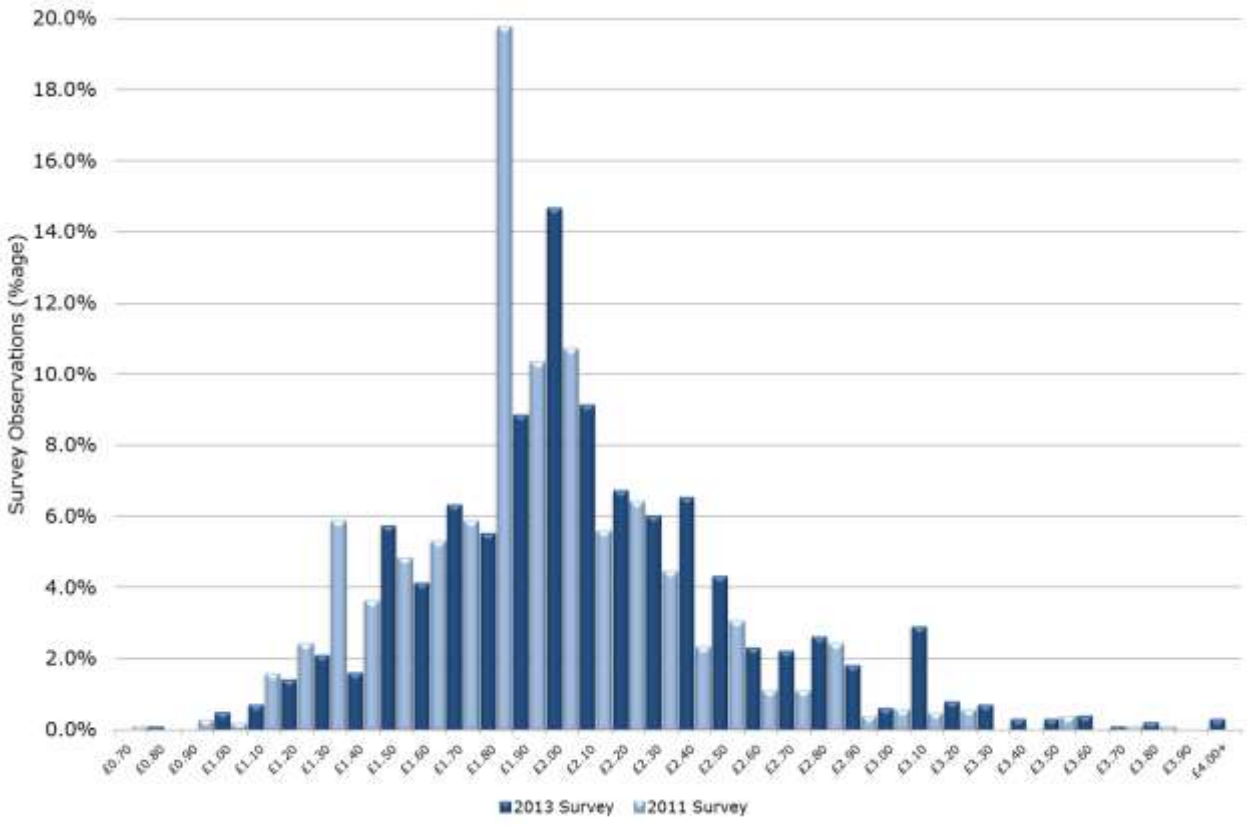
Table 5: Summary of Single Fare Averages, 2011-2013

Average	Description	2013 Value	2011 Value	Variation
Median	Middle value in ordered data	**£2.00**	**£1.90**	**+5.3%**
Mean	Sum divided by count of data	£2.11	£1.91	*+10.5%*
Mode	Most popular value in data	£2.00	£1.80	*+11.1%*

Distribution

3.3.2 Figure A shows the distribution of three mile fares by fare value for both the 2013 and 2011 surveys. The graph shows clearly a concentration of values (the modal fare) around the £2.00 value in the middle range of 2013 values, with values ranging from £0.80 (minimum) to £5.00 (maximum). In comparison with the 2011 survey, the modal fare is £1.80 – an increase of 11% in real-terms in the two years.

Figure A: Distribution of Three-Mile Single Fares, 2011-2013 Comparison



Maximum and Minimum Single Fares

3.3.3 The 2013 survey shows a wider variation in fares for typical three-mile journeys than in previous years surveyed:

3.3.4 The minimum fare was £0.80 (up from £0.70 in 2011) charged by Stagecoach East Scotland (East Haugh-Pitlochry/Moulin);

3.3.5 The maximum fare was £5.00 (up from £3.85 in 2011) charged by Pennine Bus (Skipton-Gargrave).

3.3.6 The standard deviation (that is, the distribution of data around the mean) has moved from 0.426 (2011) to 0.500 (2013); this suggests that the spread of values has widened and therefore corresponds with our observations regarding the overall median fare shift between the surveys (para. 3.3.1).

Z-Scores

3.3.7 A useful statistical measure of spread around the average (mean) of data is the Z-Score. Whilst standard deviation measures the relative 'position' of a value from the average, the Z-Score will incorporate positive and negative values to reflect relative position about the average – thus, a negative Z-Score implies 'better than', a positive Z-Score implies 'worse than'. A summary of the top ten – and bottom ten – Z-Score values are shown in Table 6. The lowest median single fare is £1.50 offered by both **Lothian Buses** and **Stagecoach Yorkshire**, contrasting with the highest median single fare of £5.00 charged by **Pennine Bus** (Skipton-Gargrave).

Table 6: Median Single Fares Z-Scores, 2013

Rank	Fare	Z-Score	Group	Company
Highest Ten Z-Scores				
=1	**£1.50**	**-1.223**	**Municipal**	**Lothian**
=1	**£1.50**	**-1.223**	**Stagecoach**	**Yorkshire**
3	£1.55	-1.123	Stagecoach	East Scotland
=4	£1.60	-1.023	First	Scotland East
=4	£1.60	-1.023	Municipal	Newport
=4	£1.60	-1.023	Municipal	Thamesdown
=4	£1.60	-1.023	Stagecoach	Highland
=8	£1.70	-0.823	Independent	Norfolk Green
=8	£1.70	-0.823	Independent	Preston Bus
=8	£1.70	-0.823	Independent	Yellow Buses
=8	£1.70	-0.823	Municipal	Blackpool
=8	£1.70	-0.823	Municipal	Cardiff
=8	£1.70	-0.823	Municipal	Nottingham
Lowest Ten Z-Scores				
1	**£5.00**	**5.770**	**Independent**	**Pennine Bus**
2	£3.50	2.773	Go-Ahead	Southern Vectis
3	£3.30	2.373	First	Beeline
4	£3.10	1.974	First	Manchester
5	£2.90	1.574	First	Cymru
=6	£2.80	1.374	First	Somerset & Avon
=6	£2.80	1.374	First	Essex
8	£2.70	1.175	Transdev	Harrogate & District
9	£2.55	0.875	Transdev	Lancashire United
=10	£2.50	0.775	Independent	Abellio Surrey
=10	£2.50	0.775	First	Aberdeen

3.4 Summary

3.4.1 We have completed our analysis of adult single fares derived from the 2013 sample data and compared with our findings from the 2011 survey. In summary:

3.4.2 The GB median adult single fare in 2013 is £2.00; an increase of over 5% since the previous survey (£1.90);

3.4.3 Compared to the median fare, the 'mean' average fare (used in previous National Fares Surveys) has seen an increase in almost 11% between both

surveys (i.e. £2.11:2013, £1.90:2011), similar to the 'modal' single fare (£2.00:2013, £1.80:2011), as demonstrated by the modal distribution of fares (Figure A);

- In the 2011 National Fares Survey, we predicted an overall increase in fares of 11% for 2012; whilst we cannot be certain that there is direct correlation to factors such as pressures on BSOG and concessionary fares, an increase of 11% as indicated here would appear lower than we would have anticipated for the period covering the past two years;

3.4.4 There is a wider distribution (range) of single fares in the most recent survey compared to the 2011 survey; this is supported by separate analyses of both standard deviation and z-scores of mean and median single fares data by sampled operator.

The 2013 Survey: Day and Weekly Tickets 4

4.1 Introduction

4.1.1 This section of the report focuses on our headline analysis of day and weekly tickets. For each of the sample journeys identified in Section 3, the day and weekly ticket equivalent products have been compiled, specifically the least expensive ticket option that would cover the whole of the specified journey. Weekly tickets available for sale online have been discounted from our analysis.

4.1.2 In total, 248 day tickets and 266 weekly tickets were identified for analysis in the 2013 survey.

4.2 Our Approach

4.2.1 For analysis of day and weekly tickets, the following assumptions have been made:

Day Tickets

- For each analysis (market, region and operator), the median day ticket value from the appropriate sample was chosen;
- To determine the equivalent single trip fare (DaySE), the day ticket value was divided by two;
- The discount applied to each day ticket is taken as follows:

  Discount (Day_{SE}) = (Median Single Fare – Day_{SE}) / Median Single Fare

- The multiplier for each day ticket is taken to be the number of trips equivalent to the single journey:

  Multiplier (Day_{SE}) = Median Day Ticket / Median Single Fare

Weekly Tickets

- The same analysis (discount and multiplier) was applied to weekly tickets. To determine the equivalent single trip fare (WeekSE), the weekly ticket value was divided by ten.
- The day-to-week multiplier is as follows:

  Multiplier (Day-Week) = Median Weekly Ticket / Median Day Ticket

4.2.2 Our analysis has been based on trip rates at their most basic interpretation – that is, a day ticket is used for two single journeys (a proxy for many return journeys) whilst a weekly ticket represents ten single journeys (or five daily return journeys). It must be noted that TAS work on concessionary fares schemes and other ticket analysis studies suggest that trip rates are typically 3.5 trips (day tickets) and 15 trips (weekly tickets).

4.3 Key Findings

Overall Findings

4.3.1 Table 7 summarises the median ratios (trip rates) between single fare, day tickets and weekly tickets across the three surveys (2009, 2011 and 2013), i.e. the number of potential single trips that could be made by each ticket before the consumer makes a saving against the price of the single fare.

4.3.2 For the majority of sample fares data, the equivalent median day ticket does not offer better value than two single tickets (a typical return journey), reflecting their use for additional consumer journeys during a typical day. Indexing median day ticket values from the 2013 survey with the 2009 survey shows a decrease in equivalent single journeys.

4.3.3 For weekly tickets, consumers can typically begin to accumulate savings on the eighth single trip during the week. Indexing median weekly ticket values from the 2013 survey with the 2009 survey shows an increase in equivalent single journeys. The same comparison can be drawn from the week-to-day ticket ratio, that is, consumers begin to accumulate savings on the fourth day of the week and the index has improved over the course of three surveys.

Table 7: Median Day- and Week-to-Single Fare Ratios

Ratio	2009 Survey	2011 Survey	2013 Survey	2013 Index (2009=100)
Day to Single	2.19	2.13	2.05	**99.94**
Week to Single	7.50	7.69	7.67	**100.02**
Week to Day	3.40	3.65	3.67	**100.08**

Distribution of Single Trip Equivalent Journeys

4.3.4 Figure B illustrates the distribution of single trip equivalent journeys from median day tickets for the 2013 and 2011 surveys. The distribution has skewed more to the right for the 2013 data, moving from a peak of around £1.80 (over 14% of the market) to £2.00 (over 16% of the market). Figure C compares the distribution of single trip equivalent journeys from median weekly tickets for the 2013 and 2011 surveys. From these data it appears that there has been a tendency for consolidation in the £0.90 to £1.90 range.

Figure B: Distribution of Day-Single Trip Equivalents, 2011-2013

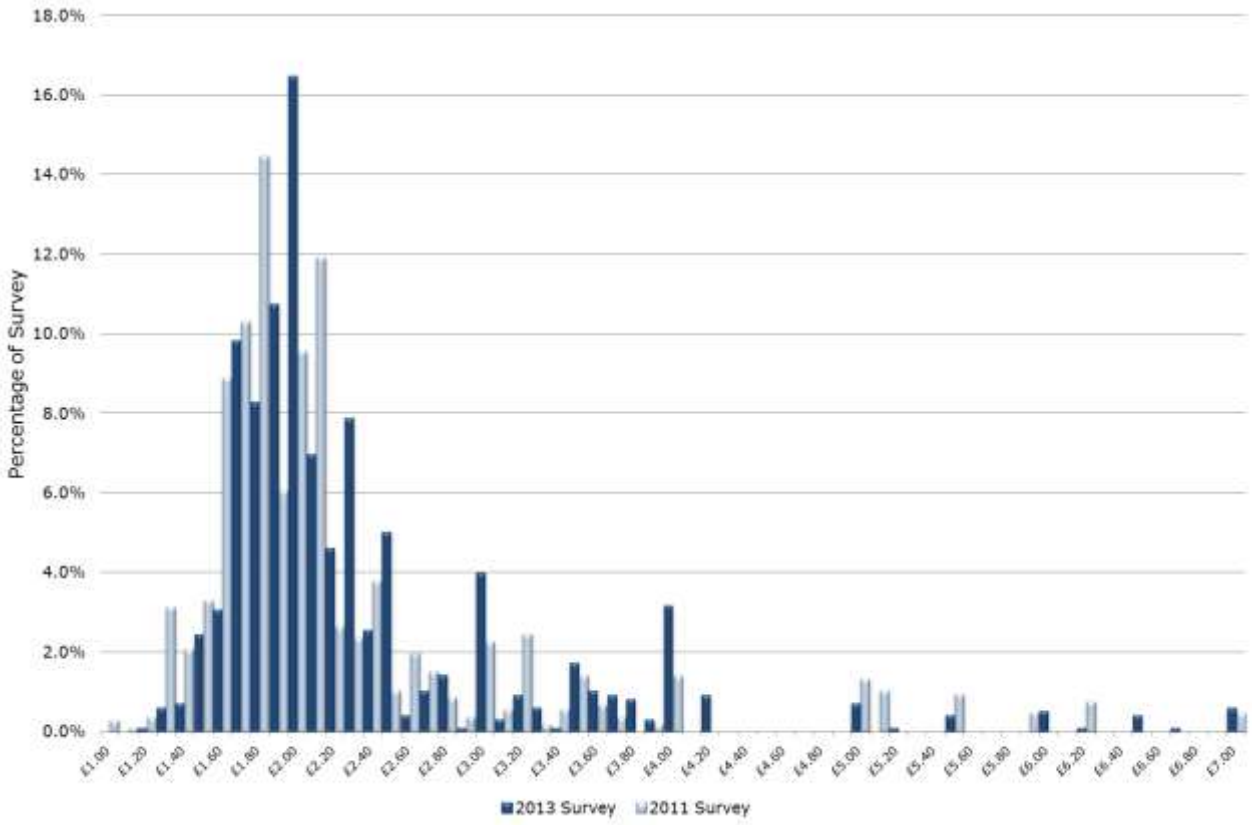
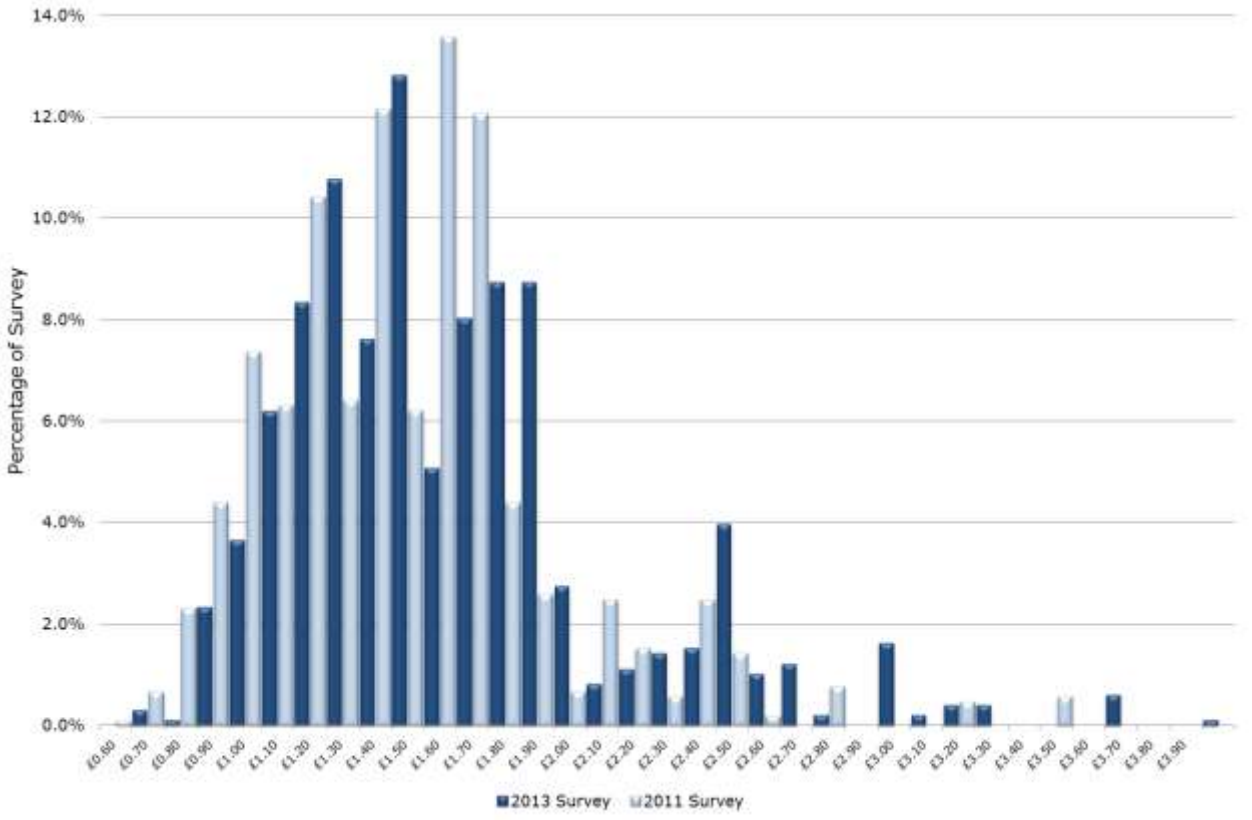


Figure C: Distribution of Week-to-Single Trip Equivalents, 2011-2013



Maximum and Minimum Fares

4.3.5 The 2013 survey shows a marked contrast in median day and weekly tickets compared to the 2011 survey:

4.3.6 For **day tickets**:

- the minimum day ticket price is £2.40 (up from £2.00 in 2011) for the Barnstaple Dayrider (charged by Stagecoach South West), with a single trip equivalent of £1.20;
- the maximum day ticket price is £15.00 (the same as 2011) for the Freedom 1 Day ticket (charged by Yorkshire Coastliner), with a single trip equivalent of £7.50;
- the standard deviation in the day ticket data has decreased to 1.820 (2013) from 1.925 (2011), suggesting that the range or spread of day ticket values has become smaller.

4.3.7 For **weekly tickets**:

- the minimum weekly ticket price is £7.50 (up from £6.00 in 2011) for the Barnstaple Megarider (charged by Stagecoach South West), with a single trip equivalent of £0.75;
- the maximum weekly ticket price is £42.00 (up from £37.00 in 2011) for the Aberdeen Zone 6 Megarider (charged by Stagecoach Bluebird), with a single trip equivalent of £4.20;
- the standard deviation in the weekly ticket data has increased from 4.379 (2011) to 5.028 (2013) suggesting that the range or spread of weekly ticket values has increased.

4.4 Summary

4.4.1 We have completed our analysis of both day and weekly tickets derived from the 2013 sample data and compared with our findings from the 2011 survey. In summary:

4.4.2 The majority of day tickets offer marginal, if any, value compared to the purchase of two single fares (a proxy 'return' journey). Indexing 2013 values to 2009 data, for example, shows a decrease in day-to-single fares ratios (i.e. sub-100);

4.4.3 For weekly tickets, customers can typically begin to accumulate savings on the eighth single trip, assuming ten single trip equivalents per week. The ratio of week-to-single fares has been consistent since the 2011 survey, and is indexed over 100 when compared to the 2009 survey;

4.4.4 There has been a moderate increase in the week-to-day fares ratio between the 2013 and 2011 surveys, suggesting that consumers typically begin to make journey savings on the fourth day of a five-day travel week;

4.4.5 There has been a positive skew in the distribution of day- and week-to-single equivalent fares between 2011 and 2013, and a general increase in the average minimum values for both ticket types. Applying a brief analysis of standard deviation to both data suggest that the range of day ticket fares has become smaller, whilst the range for weekly tickets has become larger.

Analysis by Market 5

5.1 Introduction

5.1.1 This section considers fare levels in five broad market segments:

- **City market** – for services in large urban and city conurbations;
- **Interurban market** – for services between conurbations;
- **London market** – the network as supplied by Transport for London;
- **PTE (Passenger Transport Executive) market** – the individual networks operated within each of the six PTE areas, including Strathclyde; and
- **Shire town market** – for services operating in smaller market towns.

5.2 Single Fares by Market

Distribution of Fares

5.2.1 The range of adult single fares by market type is shown in Figure D, annotated with minimum fare (green); maximum fare (red); and the median single fare within the market dataset. The largest range of tickets (£4.20 between highest and lowest) was found in the Interurban market, which included both maximum (£5.00) and minimum (£0.80) fares of the entire survey sample.

5.2.2 In comparing the median single fare across all five markets, the City market has the lowest (£1.90) and London the highest (£2.40). Compared to the London market, the City market compares favourably (£1.90 range), followed by the Shire Town market (£2.40). The PTE market has a higher overall range of fares than London (£2.80).

Trends in Fares

5.2.3 Figure E illustrates the trends in median single fare data by market type over the previous three surveys. The London market has consistently had the highest median single fare. The PTE market, which had the lowest median single fare in 2009, has been overtaken by the City market for lowest fare in 2013.

Analysis by Operator and Market

5.2.4 We have provided additional analysis of median single fares by operator for each market type: City (Figure F); Interurban (Figure G); PTE (Figure H); and Shire Town (Figure I). Table 8 provides a summary of the key findings. As London has a flat fare, it has been discounted from this analysis.

Figure D: Overall Range of Single Fares by Market Type

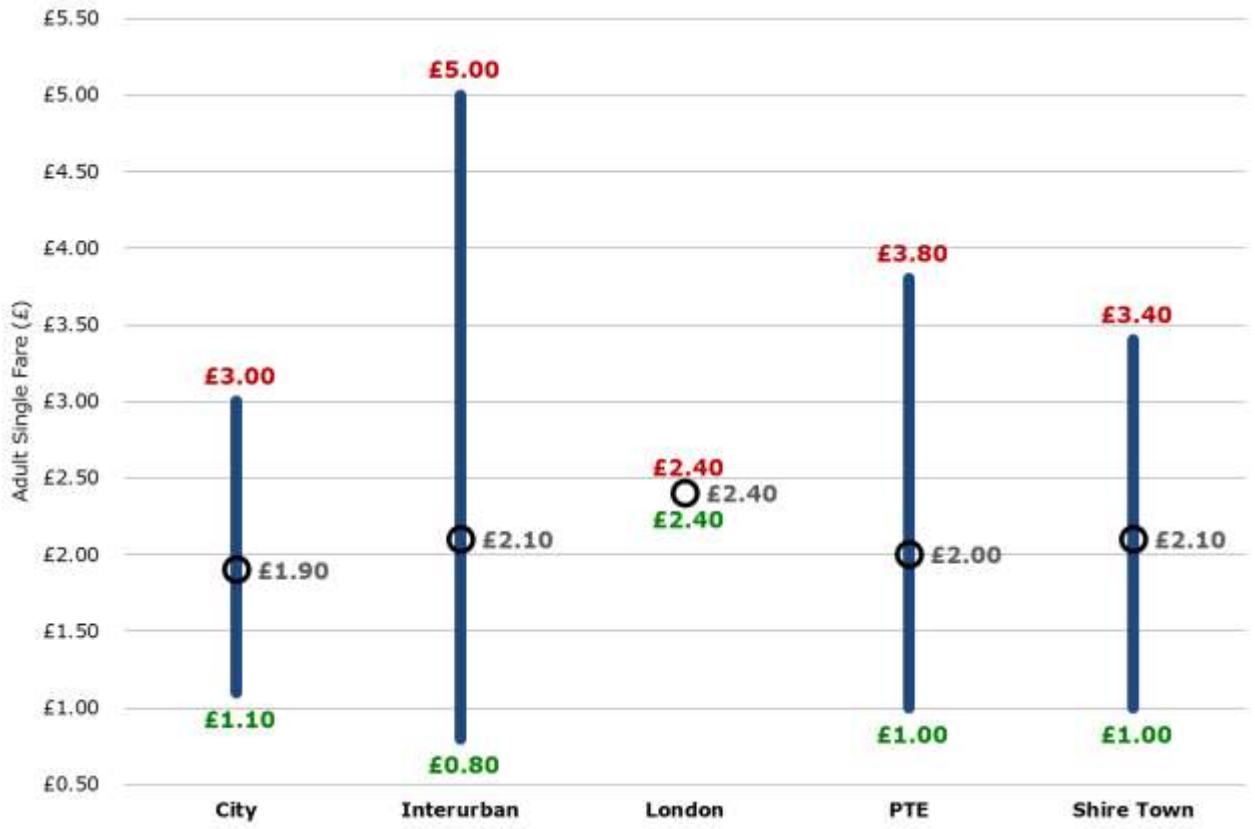


Figure E: Single Fares by Market Type, 2009-2013

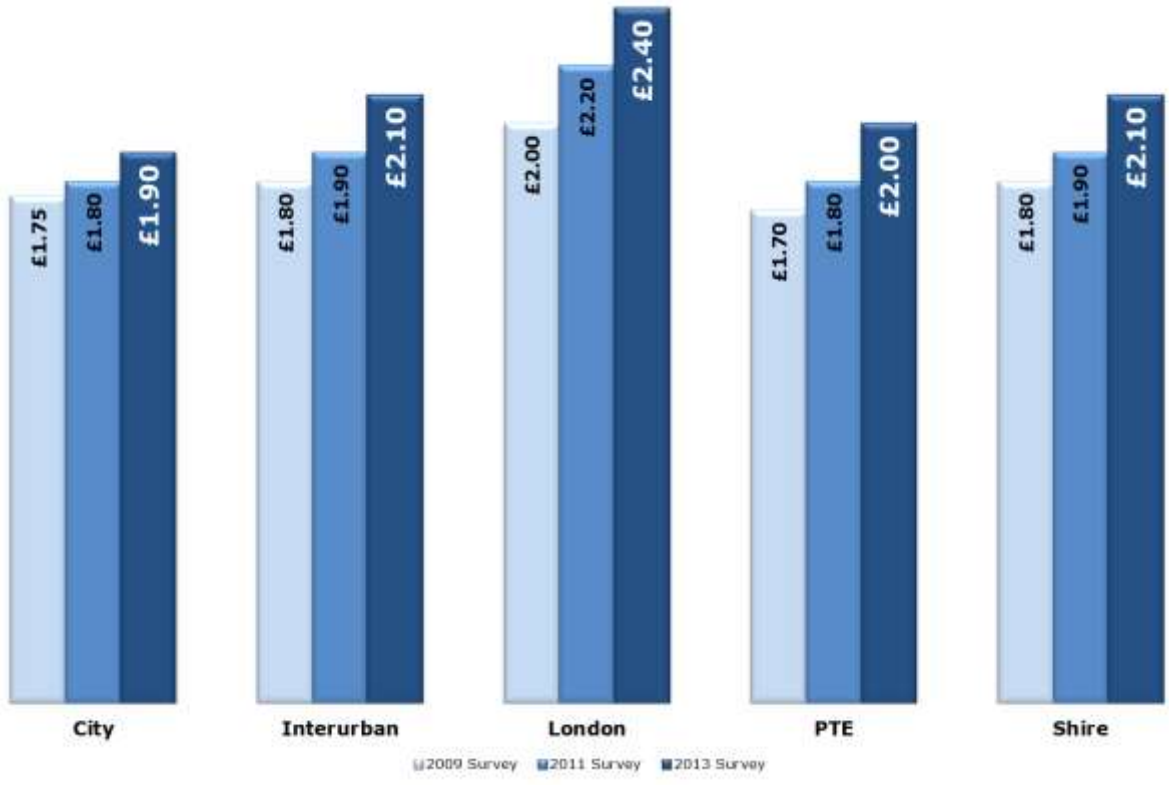


Figure F: City Market – Range of Single Fares by Operator

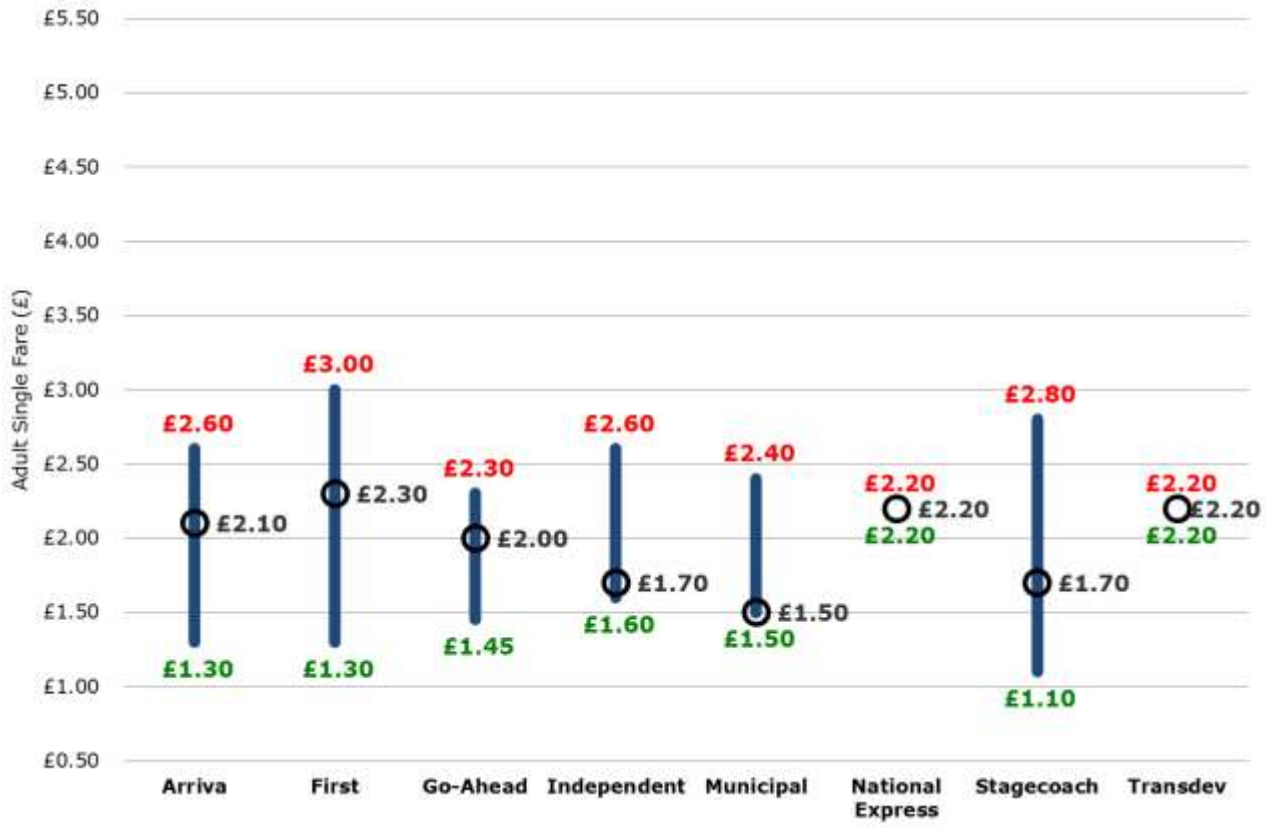


Figure G: Interurban Market – Range of Single Fares by Operator

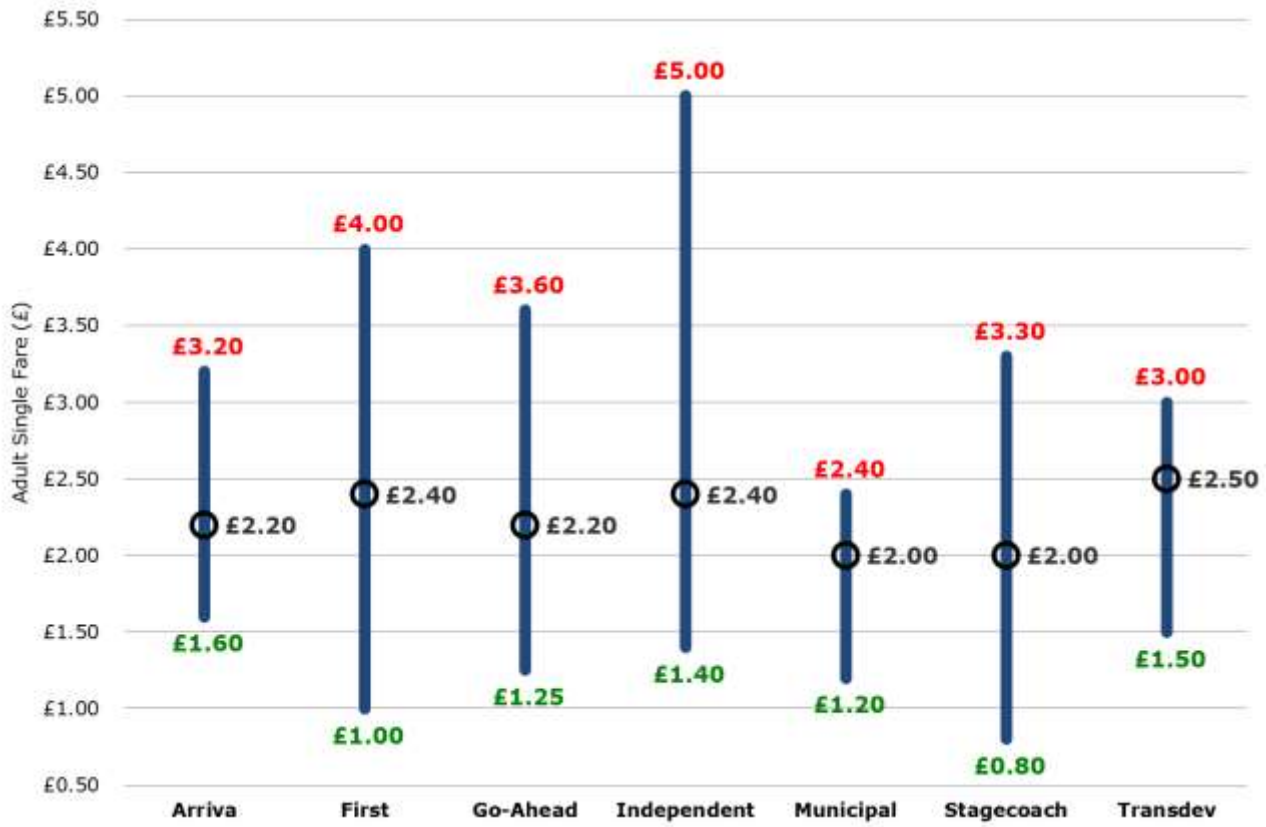


Figure H: PTE Market – Range of Single Fares by Operator

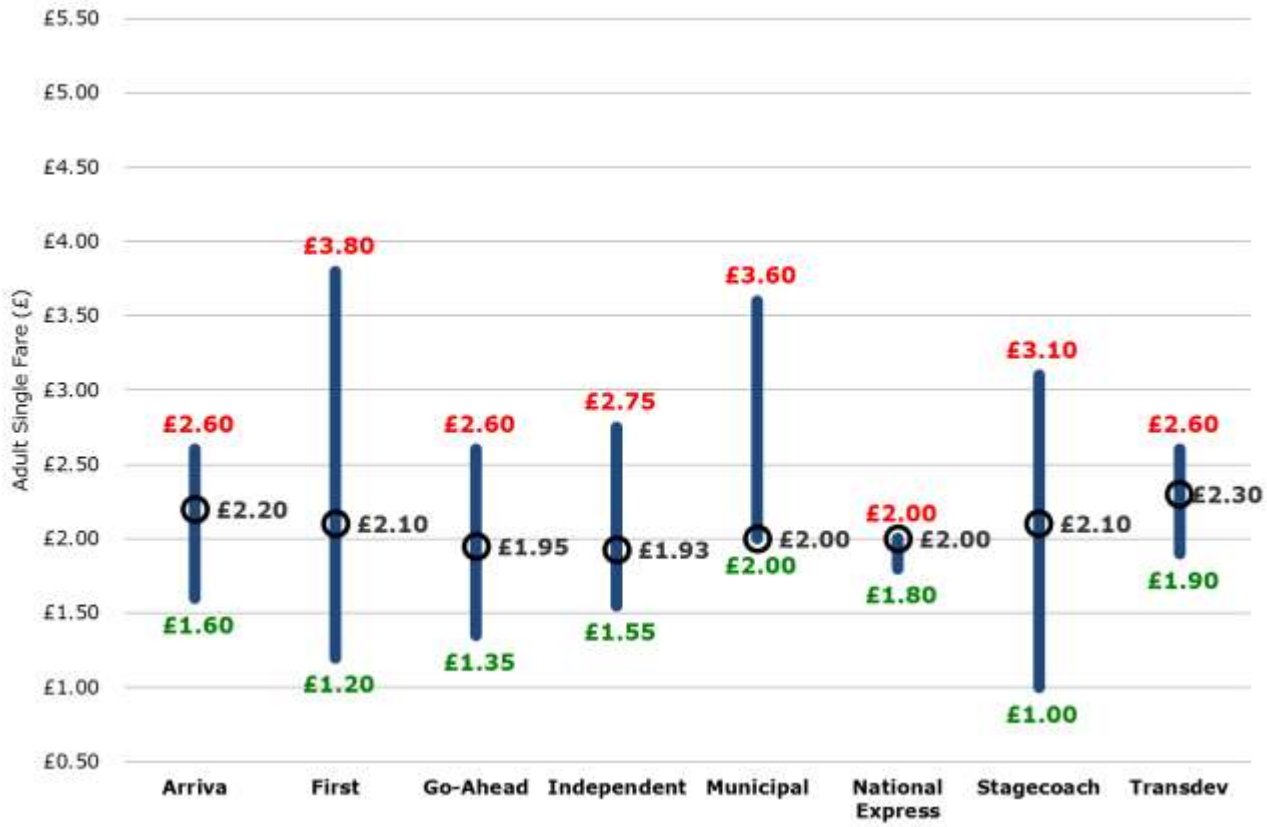


Figure I: Shire Town Market – Range of Single Fares by Operator

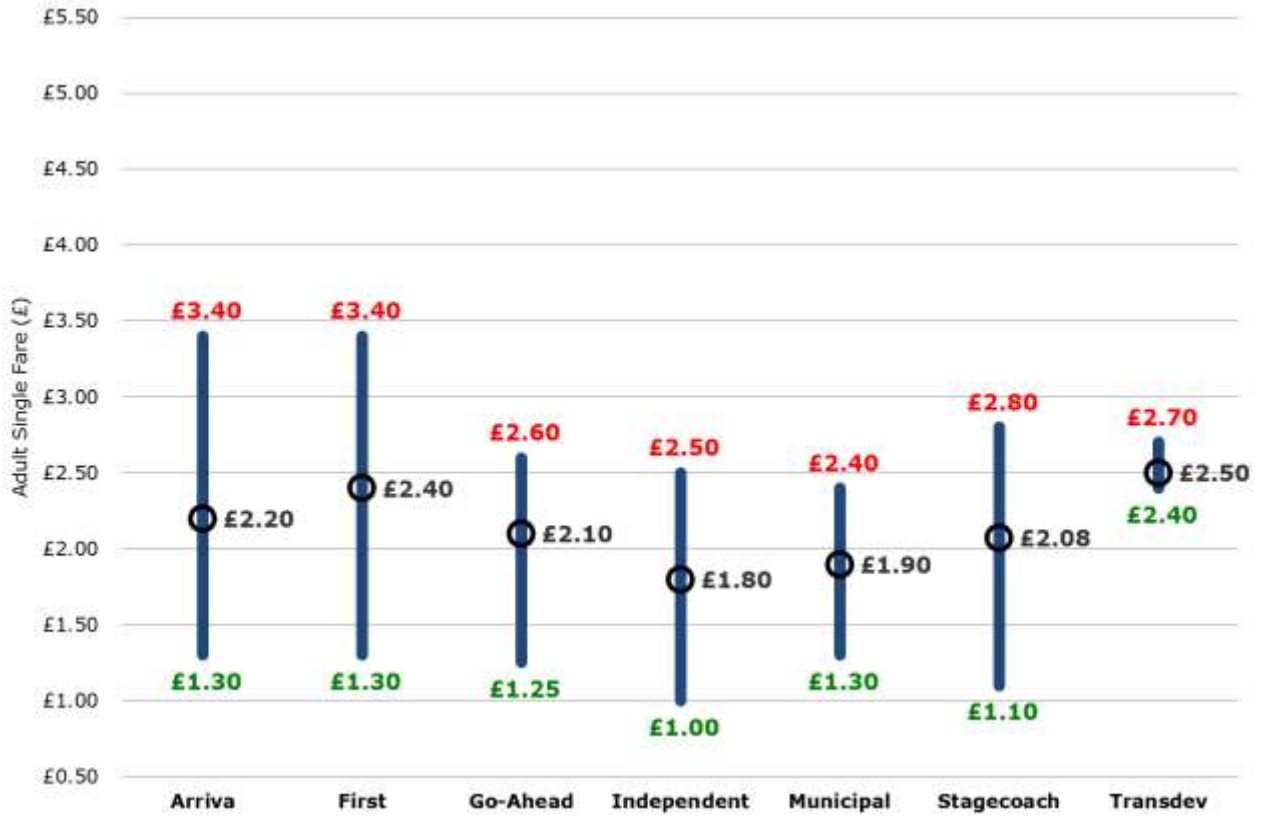


Table 8: Summary Analysis: Operator Single Fares by Market

Minimum Range	Lowest Actual Fare	Lowest Median Fare	Highest Median Fare	Highest Actual Fare	Maximum Range
City Market (Figure F)					
Zero National Express	**£1.10** Stagecoach	**£1.50** Municipal	**£2.30** First	**£3.80** First	**£1.70** First/ Stagecoach
Interurban Market (Figure G)					
£1.20 Municipal	**£0.80** Stagecoach	**£2.00** Municipal/ Stagecoach	**£2.50** Transdev	**£5.00** Independent	**£3.60** Independent
PTE Market (Figure H)					
£0.20 National Express	**£1.00** Stagecoach	**£1.93** Independent	**£2.30** Transdev	**£3.80** First	**£2.60** First
Shire Town Market (Figure I)					
£0.30 Transdev	**£1.00** Independent	**£1.80** Independent	**£2.50** Transdev	**£3.40** Arriva/ First	**£2.10** Arriva/ First

5.2.5 Our analysis highlights the following:

5.2.6 **Minimum fare:** Stagecoach offers minimum median single fares in three markets (City, Interurban and PTE markets), with Independents operators having the lowest fare in the Shire Town market. The difference between highest and lowest fares across all markets is £0.30;

5.2.7 **Maximum fare:** First offers maximum median single fares in three markets (City, PTE and Shire Town market, the latter shared with Arriva and City shared with Stagecoach), with Independent operators having the highest fare in the Interurban market. The range across these fares is £1.60;

5.2.8 **Median Fares:** The lowest median single fare is £1.50 in the City market (Municipal operators), compared to the highest median single fare of £2.50 in the Interurban and Shire Town markets (both Transdev);

5.2.9 **Total Sample Range:** The largest range of single fares is found in the Interurban market (which includes the 2013 survey's lowest and highest value fares) (£4.20), with the Shire Town market arguably having the smallest range in single fares (£2.40);

5.2.10 **TAS Comment:** Whilst the preconception may be that the Shire Town market is typically more expensive than the urban markets of the large towns, cities and PTEs, it has the smallest variation in median single fares and the lowest-priced "maximum fare". Stagecoach provides good value in its core markets, whilst we have yet to see how First's fares reduction strategy will assist growth in arguably its core markets too.

5.3 Day and Weekly Fares by Market

5.3.1 Table 9 summarises the median ratios (trip rates) between single fare, day tickets and weekly tickets across the three surveys (2009, 2011 and 2013) for each of the five market types:

5.3.2 **Day-to-Single ticket ratios:** range from less than the price of two single trips (London and City services), to almost the price of three single trips (Interurban services). Over the three TAS surveys, the London market continues to offer greater savings on the second trip, whilst the Interurban market is consistently higher;

5.3.3 **Week-to-Single ticket ratios:** the PTE and Shire Town markets offer customers potential savings on their eighth trips (the PTE multiplier having decreased over the course of three surveys), whilst the Interurban market offers savings on the tenth (final weekly journey) only;

5.3.4 **Week-to-Day ticket ratios:** The Interurban, PTE and Shire Town markets offer customers potential savings on the fourth day of the week, with both City and London markets on the last (fifth) day).

Table 9: Day and Weekly Ticket Multipliers, 2013

Market	Day-to-Single			Week-to-Single			Week-to-Day		
	2009	2011	**2013**	2009	2011	**2013**	2009	2011	**2013**
City	1.9	1.9	**1.9**	6.9	8.3	**8.2**	3.6	4.3	**4.2**
Interurban	2.8	3.0	**2.9**	8.3	8.9	**9.3**	3.0	3.0	**3.3**
London	1.9	1.8	**1.8**	6.9	8.1	**8.2**	3.6	4.5	**4.5**
PTE	2.1	2.1	**2.0**	7.6	7.8	**7.0**	3.7	3.8	**3.5**
Shire Town	2.0	2.1	**2.1**	6.7	7.4	**7.6**	3.3	3.5	**3.6**

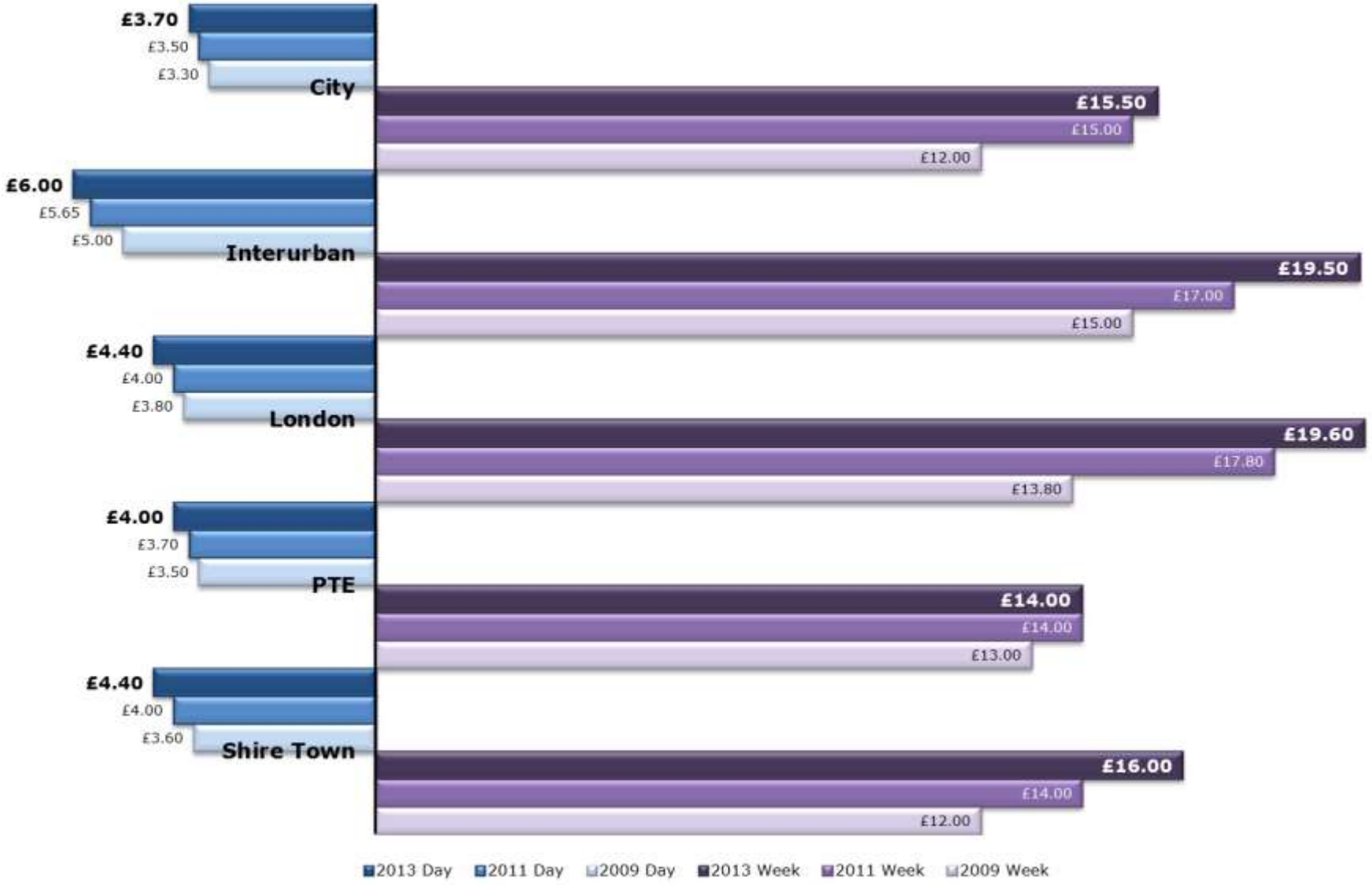
Trends

5.3.5 Figure J illustrates the trends in day and weekly ticket data by market type over the previous three surveys:

5.3.6 **Day tickets:** The median day ticket value in the Interurban market has been consistently higher than the other markets (including London) over the three surveys. The City market has the lowest median day ticket value;

5.3.7 **Weekly tickets:** The London market has the highest median weekly ticket value of the five markets – a repeat of 2011. The PTE market offers the lowest median weekly ticket value, consistent from 2011.

Figure J: Day and Weekly Tickets by Market Type, 2009-2013



5.4 Pricing and Discounts: Urban and Non-Urban Market Services

5.4.1 Table 10 provides a summary analysis of day and weekly ticket pricing discounts and trip multipliers by market, comparing urban and non-urban services from the 2013 sample. For consistency, median ticket values have been used for both day and weekly tickets.

Table 10: Market Pricing and Discounts, 2013

Market	Day Ticket Analysis			Weekly Ticket Analysis			Day to Week Multiplier
	Median Ticket	Discount	Multiplier	Median Ticket	Discount	Multiplier	
Urban Services							
City	£1.85	2.6%	**1.9**	£1.55	18.4%	**8.2**	**4.2**
Interurban	£2.40	-9.1%	**2.2**	£1.90	13.6%	**8.6**	**4.0**
London	£2.20	8.3%	**1.8**	£1.96	18.3%	**8.2**	**4.5**
PTE	£2.00	0.0%	**2.0**	£1.40	30.0%	**7.0**	**3.5**
Shire Town	£2.15	-2.4%	**2.0**	£1.60	23.8%	**7.6**	**3.7**
Variation	*29.7%*		*19.0%*	*40.0%*		*23.4%*	*27.3%*
GB Average	**£2.16**	**-2.7%**	**2.1**	**£1.57**	**25.4%**	**7.5**	**3.6**
Non-Urban Services							
City	£2.33	-19.2%	**2.4**	£1.80	7.7%	**9.2**	**3.9**
Interurban	£3.05	-45.2%	**2.9**	£2.00	4.8%	**9.5**	**3.3**
PTE	£2.00	2.4%	**2.0**	£1.35	34.1%	**6.6**	**3.4**
Shire Town	£2.35	-30.6%	**2.6**	£1.60	11.1%	**8.9**	**3.4**
Variation	*52.5%*		*48.9%*	*48.1%*		*44.6%*	*18.1%*
GB Average	**£3.15**	**-46.1%**	**2.9**	**£2.02**	**6.2%**	**9.4**	**3.2**

Urban Services

5.4.2 Our analysis of discounts and trip multipliers for urban market services (including London for comparison) shows that:

5.4.3 **For day tickets:** City and London customers begin to make savings against the cost of single ticket purchases on the second trip. The greatest discount against the cost of equivalent single ticket purchases are for services in the London (8.3%). Customers using services in Interurban and Shire Town markets generally have to pay a premium for day ticket equivalents;

5.4.4 **For weekly tickets:** PTE and Shire Town customers begin to make savings on their eighth weekly journey, compared to other markets (ninth journey). For week-to-day analysis, customers in PTE and Shire Town urban markets begin to make savings on the fourth day of the week.

Non-Urban Services

5.4.5 Our analysis of discounts and trip multipliers for non-urban market services (excluding London for comparison) shows that:

5.4.6 **For day tickets:** Customers in all markets need to make over two single journeys to begin making a saving against the cost of the equivalent day ticket. The greatest discount can be found in the PTE markets; customers using services in all other markets (excluding London from the analysis) have to pay a substantial premium for equivalent day ticket purchases;

5.4.7 **For weekly tickets:** PTE customers using non-urban services begin to make savings on the seventh single journey. Customers using City and Interurban services have to wait until the tenth – and final single trip – to make a saving. For week-to-day analysis, customers in all markets generally begin to make savings on the fourth daily journey.

5.5 In Summary

5.5.1 We have completed our analysis of single, day and weekly fares from our 2013 survey sample using five market structures. In summary:

5.5.2 The median single fare and day ticket has increased across successive surveys for all markets included within our analysis. In most cases, the cost of weekly tickets has followed the same trend, except in the PTE market where there has been no change in the median cost of a weekly ticket between 2011 and 2013;

5.5.3 The Interurban market has the highest and lowest single fares values of the 2013 survey data. This market follows a trend from the previous three surveys of offering the lowest discount and savings potential for customers using day and weekly tickets compared to single journey equivalent tickets. Of the major operating groups, only National Express does not operate registered bus services (although it does offer coach services not considered within this analysis);

5.5.4 Stagecoach offers the lowest single fares in three markets (City, Interurban and PTE), whilst First offers the highest single fares in three markets (City, PTE and Shire Town) and in two instances these are in the same area;

5.5.5 In comparing urban and non-urban services within each market, it becomes evident that customer savings generally take longer to achieve when purchasing day and weekly tickets against the cost of single trip equivalent fares for the latter services rather than the former. Customers within London generally get the better savings on day tickets compared to single tickets, whilst PTE customers in both urban and non-urban markets get better savings on weekly tickets to compared to single tickets.

Analysis by Region 6

6.1 Introduction

6.1.1 This section contains our analysis of the 2013 survey data by geographic region. For consistency in comparison with our previous surveys in 2009 and 2011, we have chosen the former **Government Office Region (GOR) boundaries** to define our regions (Figure K).

6.2 Single Fares by Region

Distribution of Fares

6.2.1 The range of adult single fares by region is shown in Figure L, annotated with minimum fare (green); maximum fare (red); and the median single fare with the regional dataset. The largest range of tickets (£4.00 between highest and lowest) was found in Yorkshire/Humber. This region had the maximum single fare (£5.00) with Scotland having the minimum single fare (£0.80).

6.2.2 In comparing the median single fare across all regions, Scotland has the lowest fare (£1.80) with London the highest (£2.40). Compared to the London region (with no pricing range), the West Midlands compares favourably (£1.10 range), followed by both the East Midlands and North East England (£1.75).

Trends in Fares

6.2.3 Figure M illustrates the trends in median single fare data by region over the previous three surveys. London has had the highest median single fare over the previous two surveys, although Wales had the highest fare in the 2009 survey. Scotland has consistently had the lowest median single fare over the three surveys.

Analysis by Operator and Region

6.2.4 We have provided additional analysis of median single fares by operator for each region, except for London (Table 11 for reference charts); Table 12 provides a summary of the key findings:

Table 11: Regional Median Single Fares Analysis (by Operator)

East England (Figure N)	**South East England** (Figure S)
East Midlands (Figure O)	**South West England** (Figure T)
North East England (Figure P)	**Wales** (Figure U)
North West England (Figure Q)	**West Midlands** (Figure V)
Scotland (Figure R)	**Yorkshire/Humber** (Figure W)

Figure K: Government Office Regions

Figure L: Overall Range of Single Fares by Region

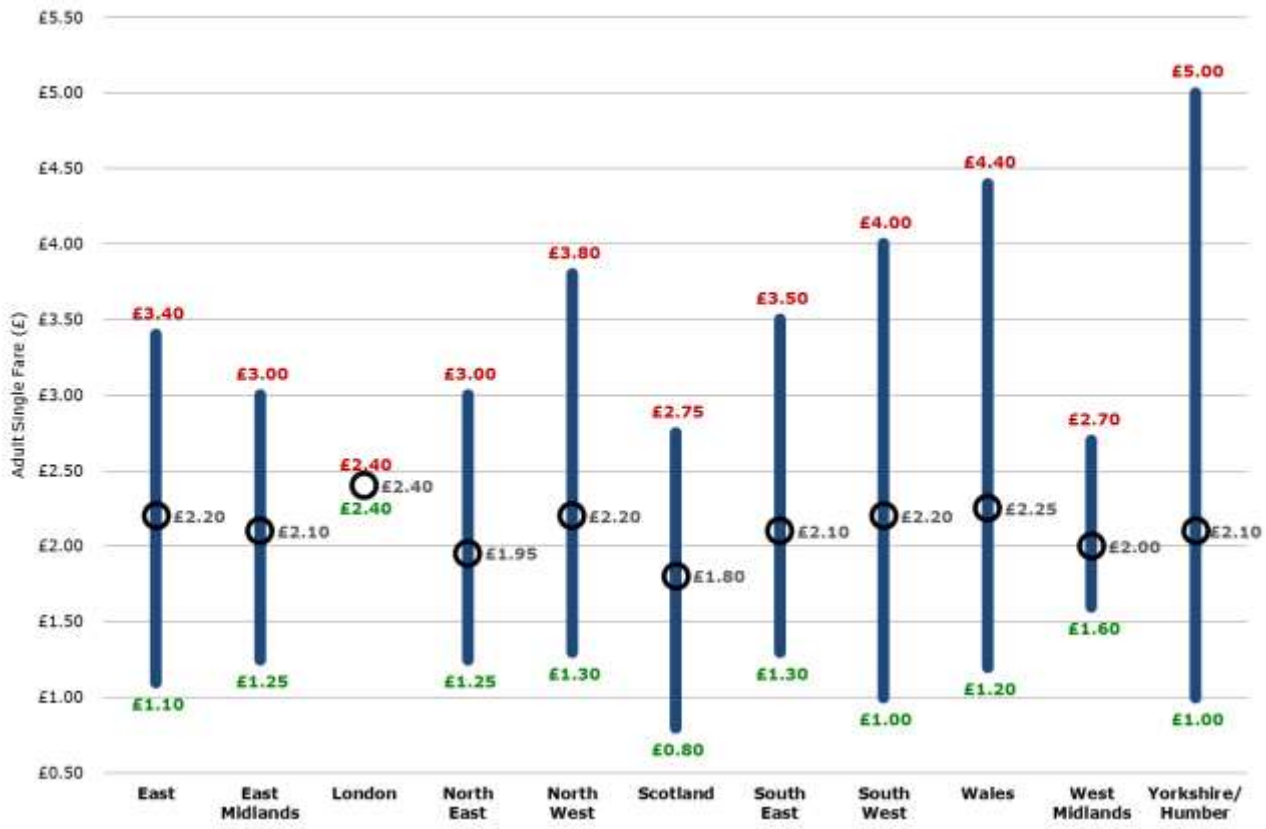


Figure M: Single Fares by Region, 2009-2013

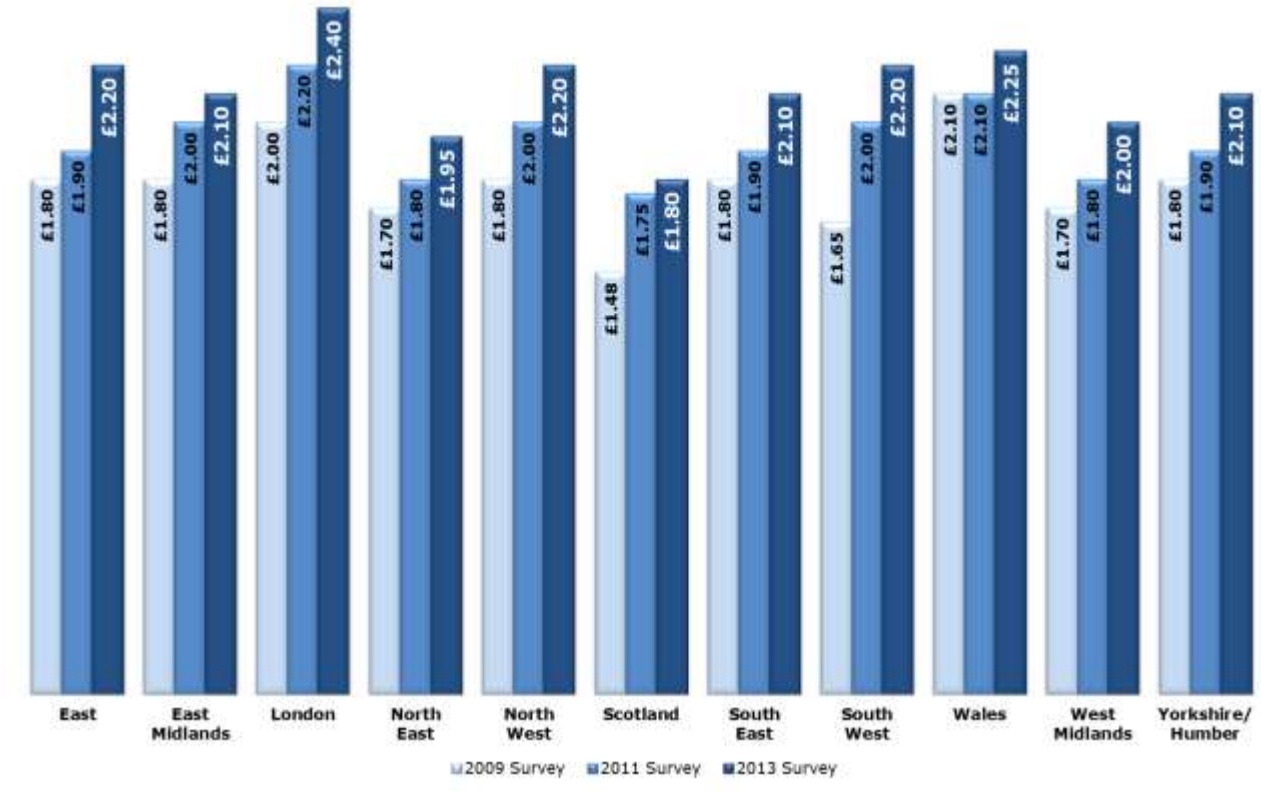


Figure N: East England – Range of Single Fares by Operator

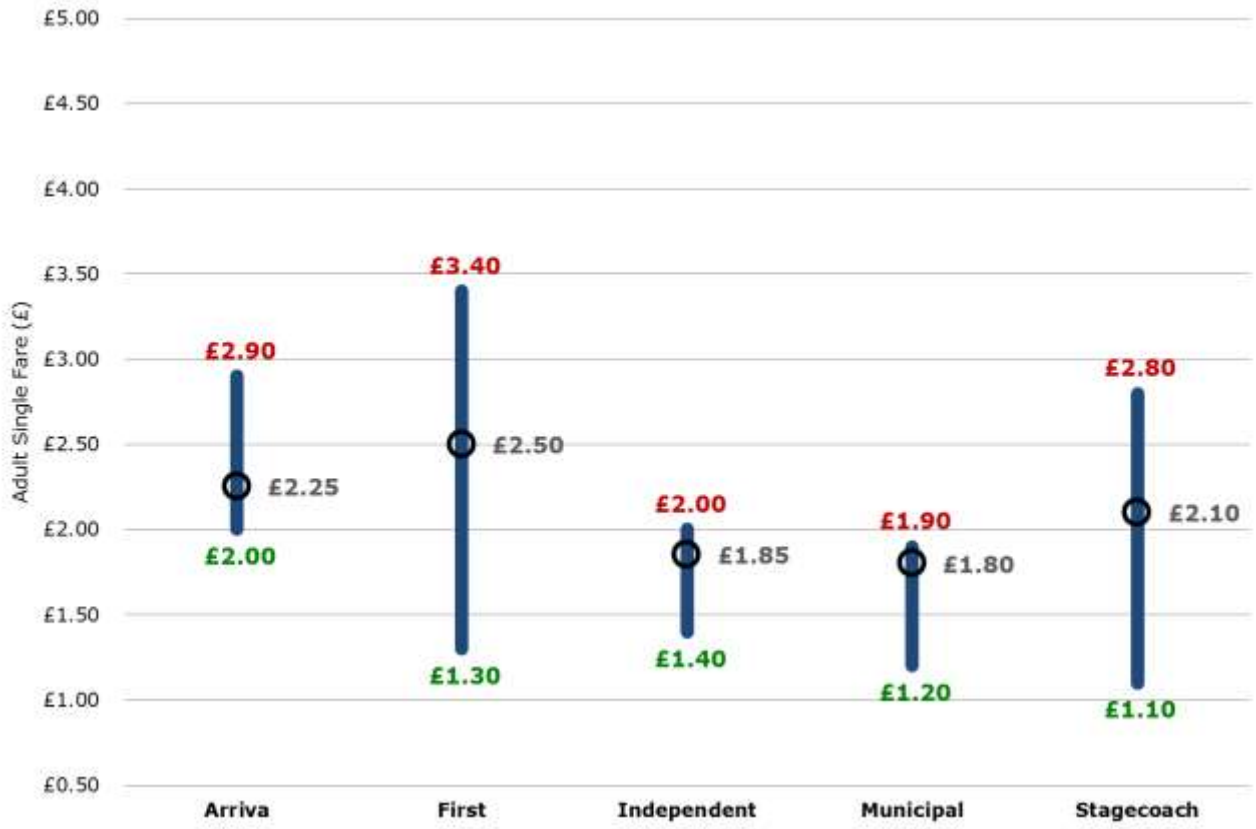


Figure O: East Midlands – Range of Single Fares by Operator

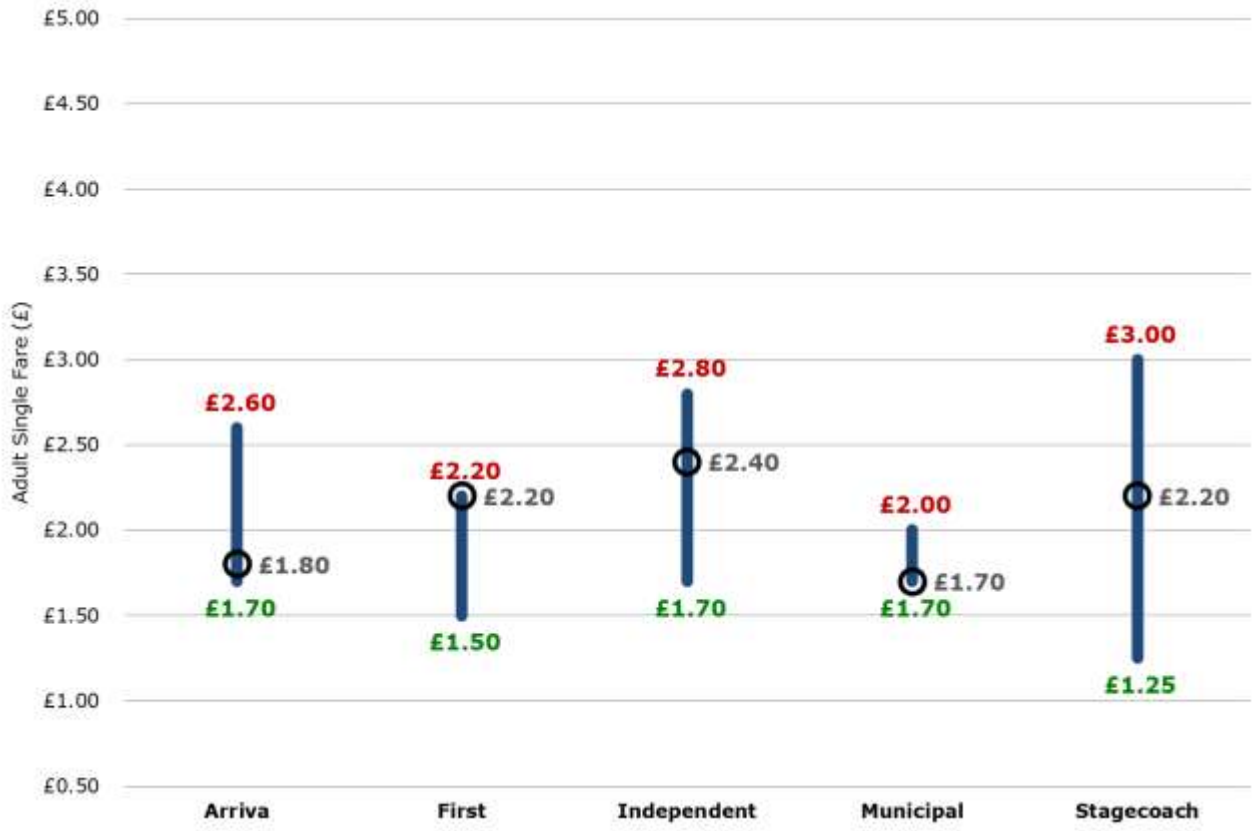


Figure P: North East England – Range of Single Fares by Operator

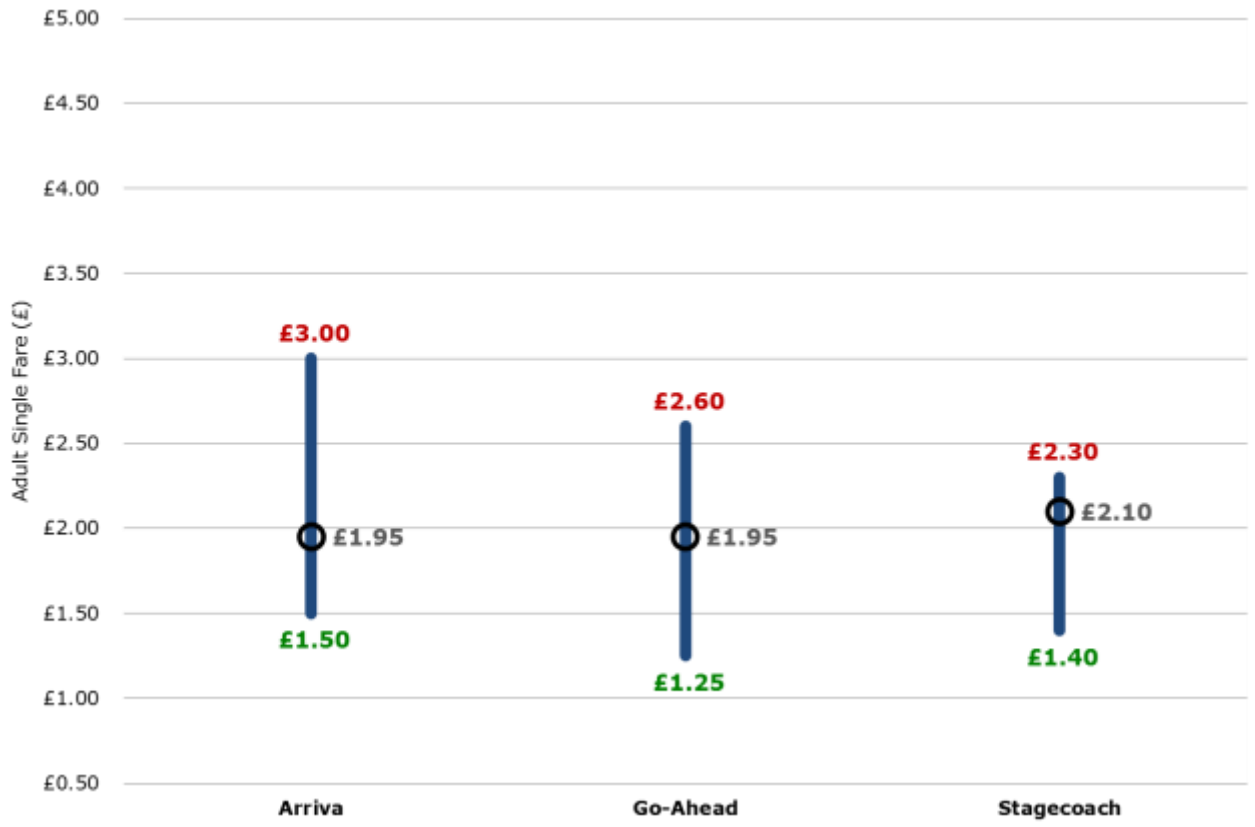


Figure Q: North West England – Range of Single Fares by Operator

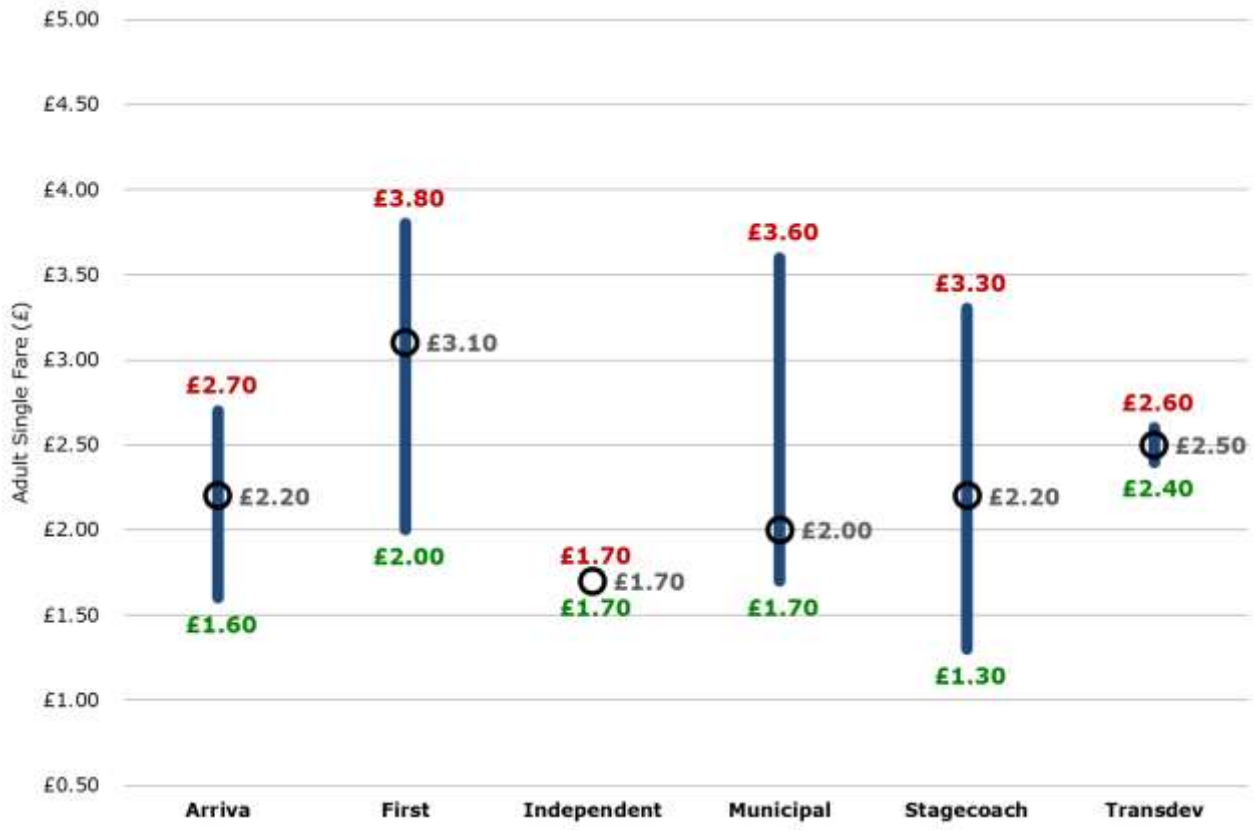


Figure R: Scotland – Range of Single Fares by Operator

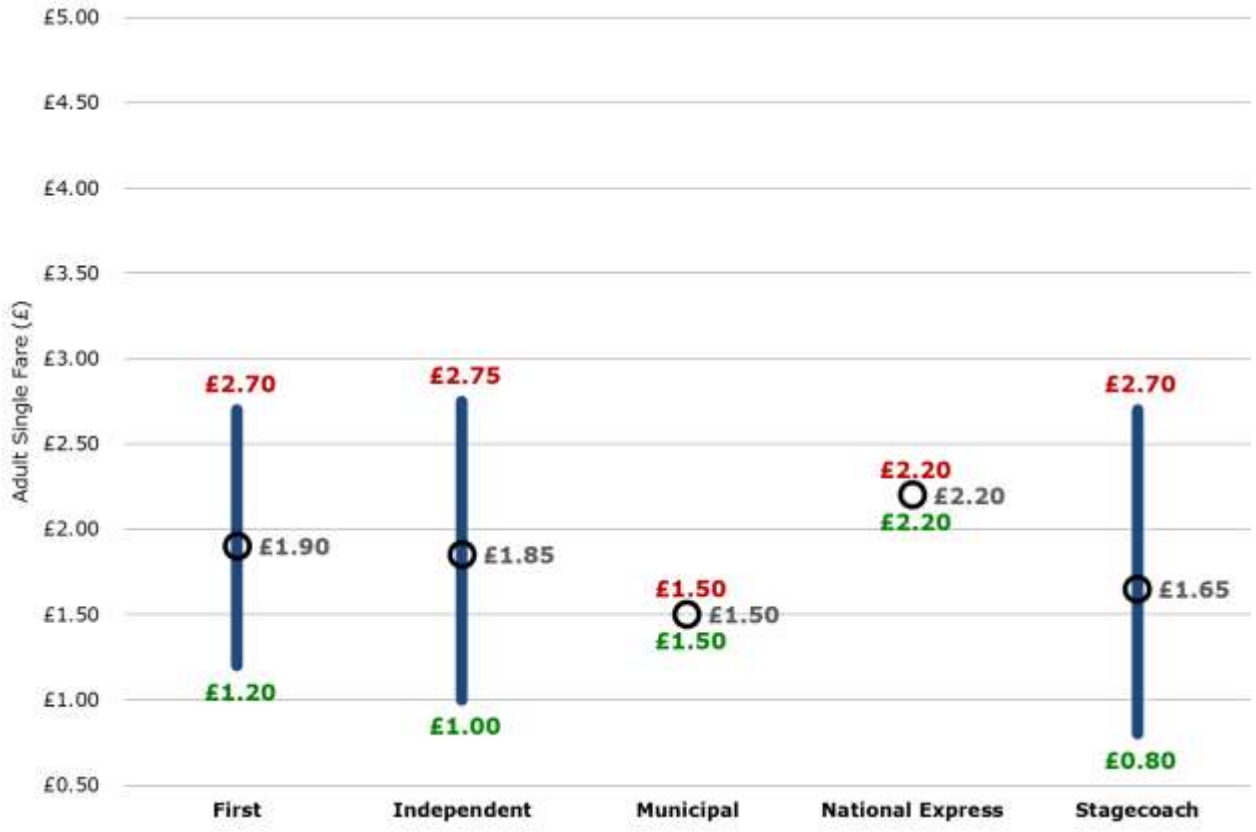


Figure S: South East England – Range of Single Fares by Operator

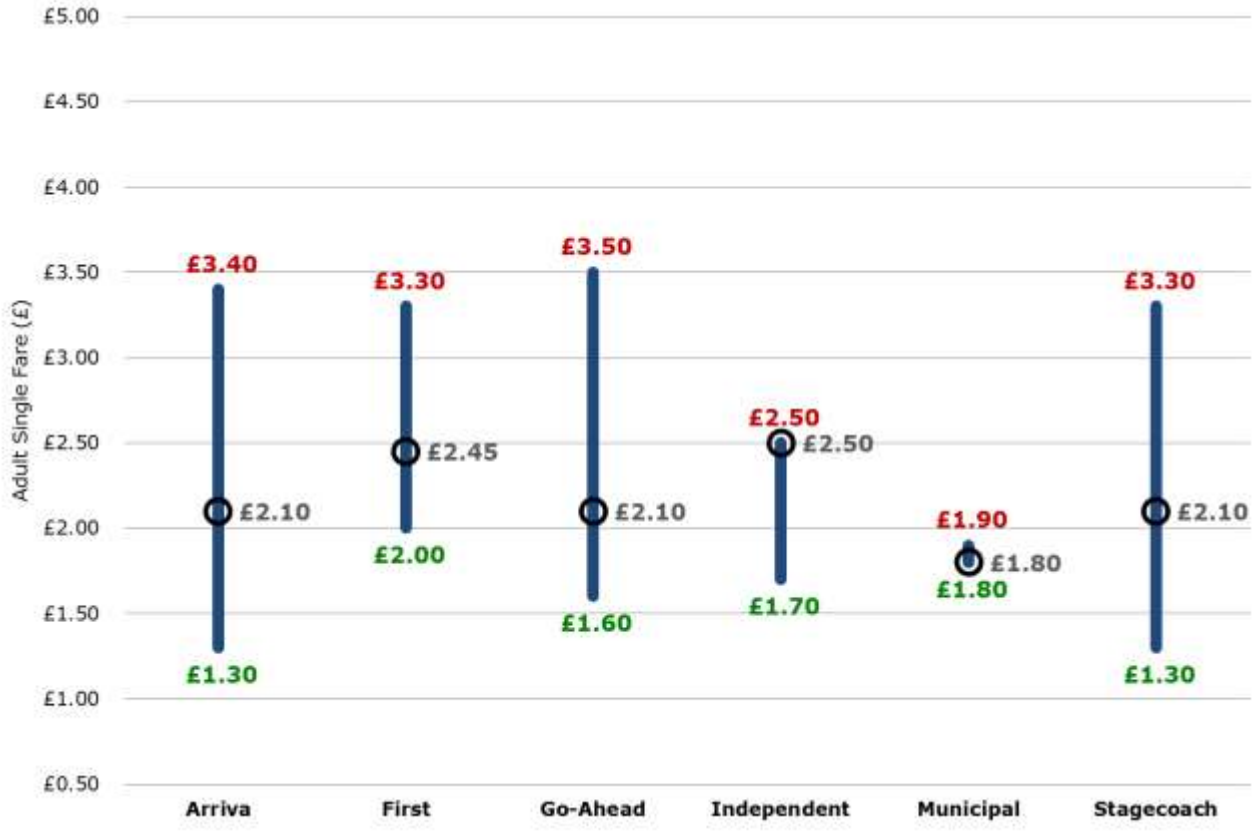


Figure T: South West England – Range of Single Fares by Operator

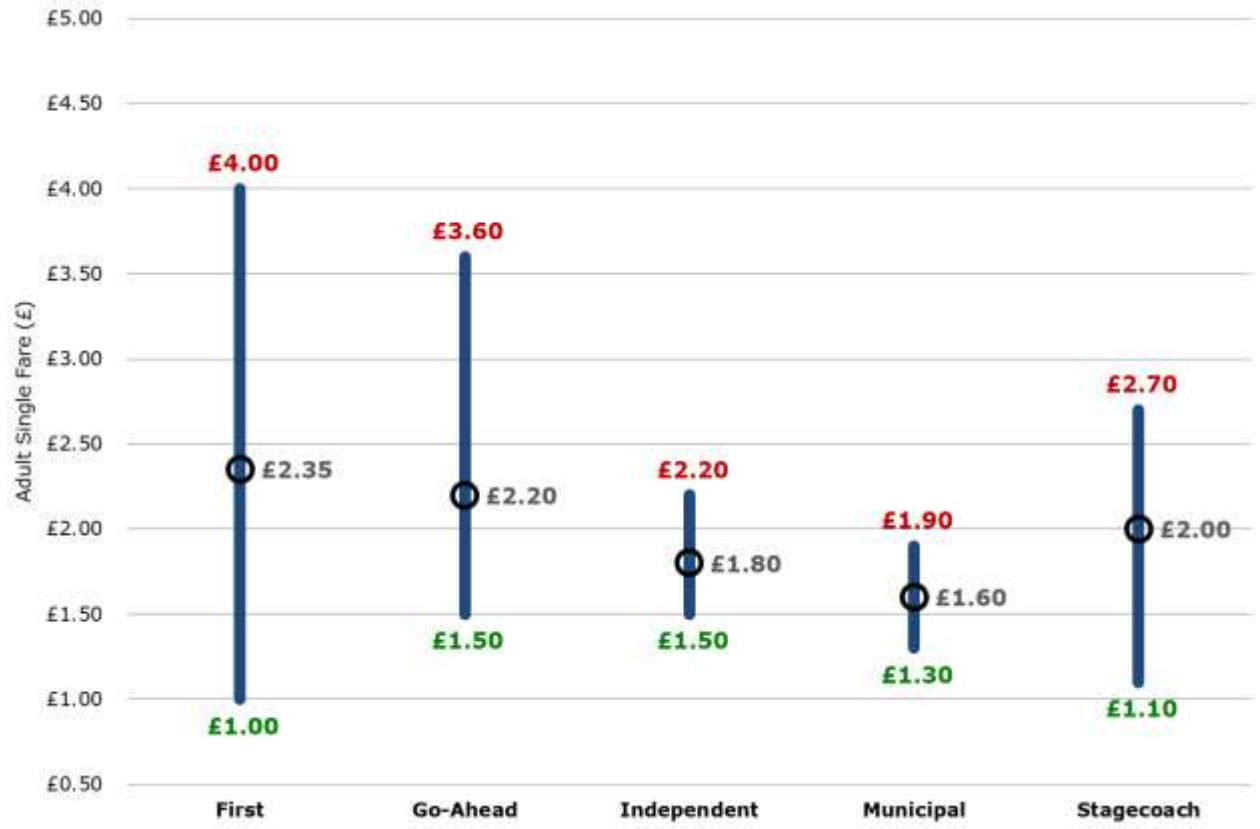


Figure U: Wales – Range of Single Fares by Operator

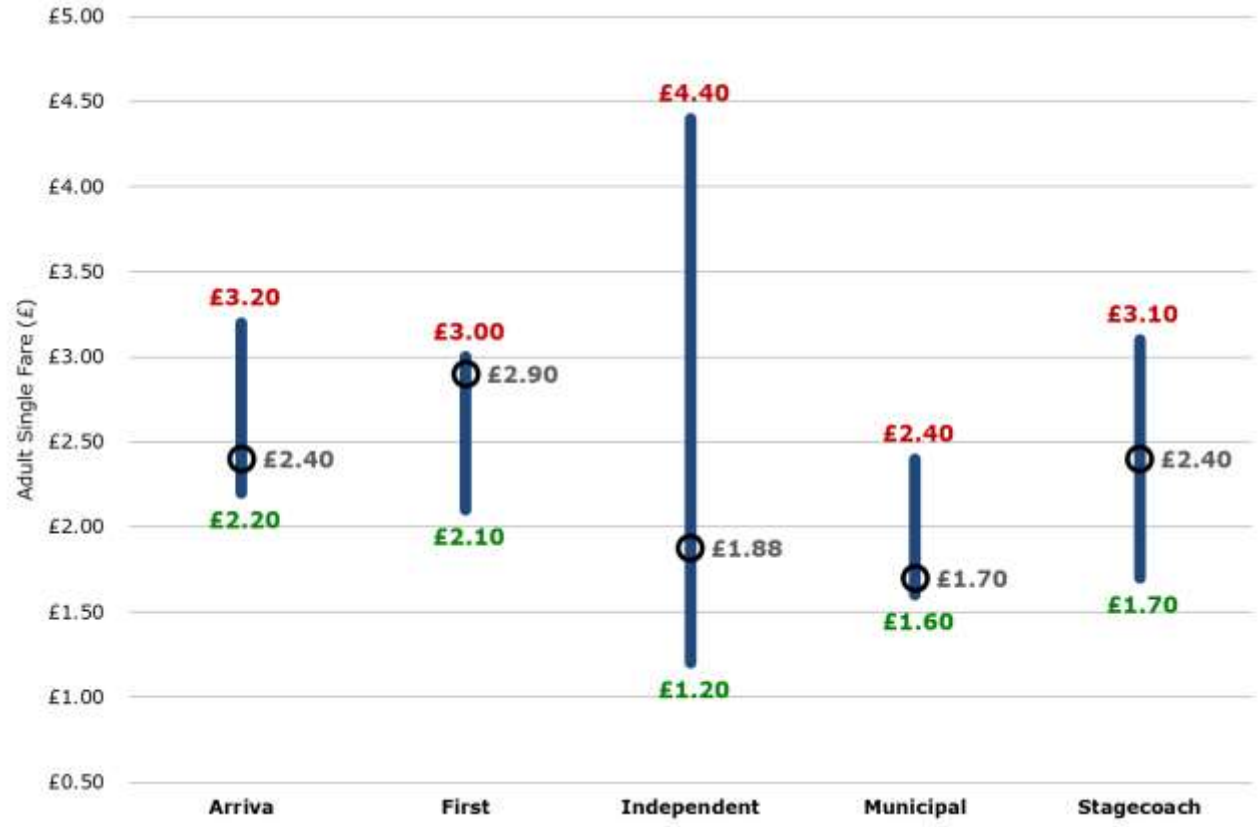


Figure V: West Midlands – Range of Single Fares by Operator

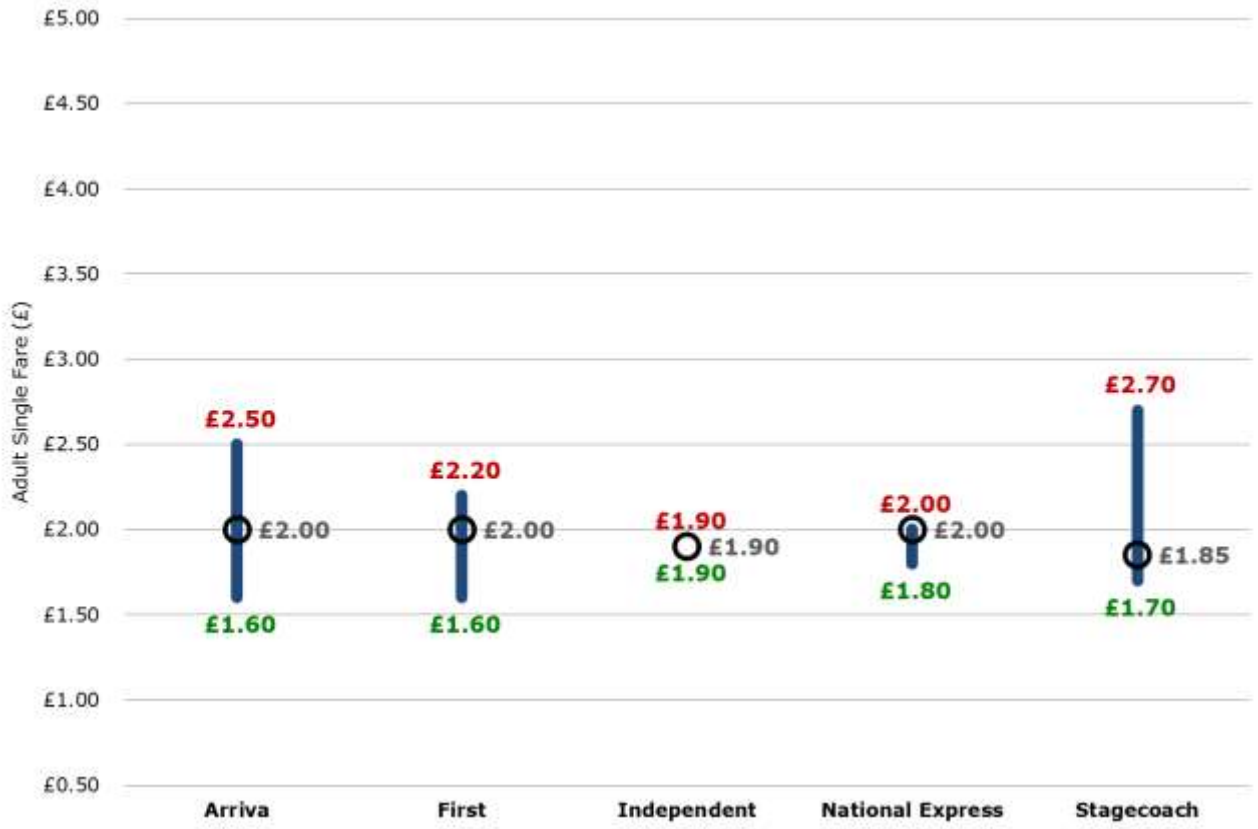


Figure W: Yorkshire and Humber – Range of Single Fares by Operator

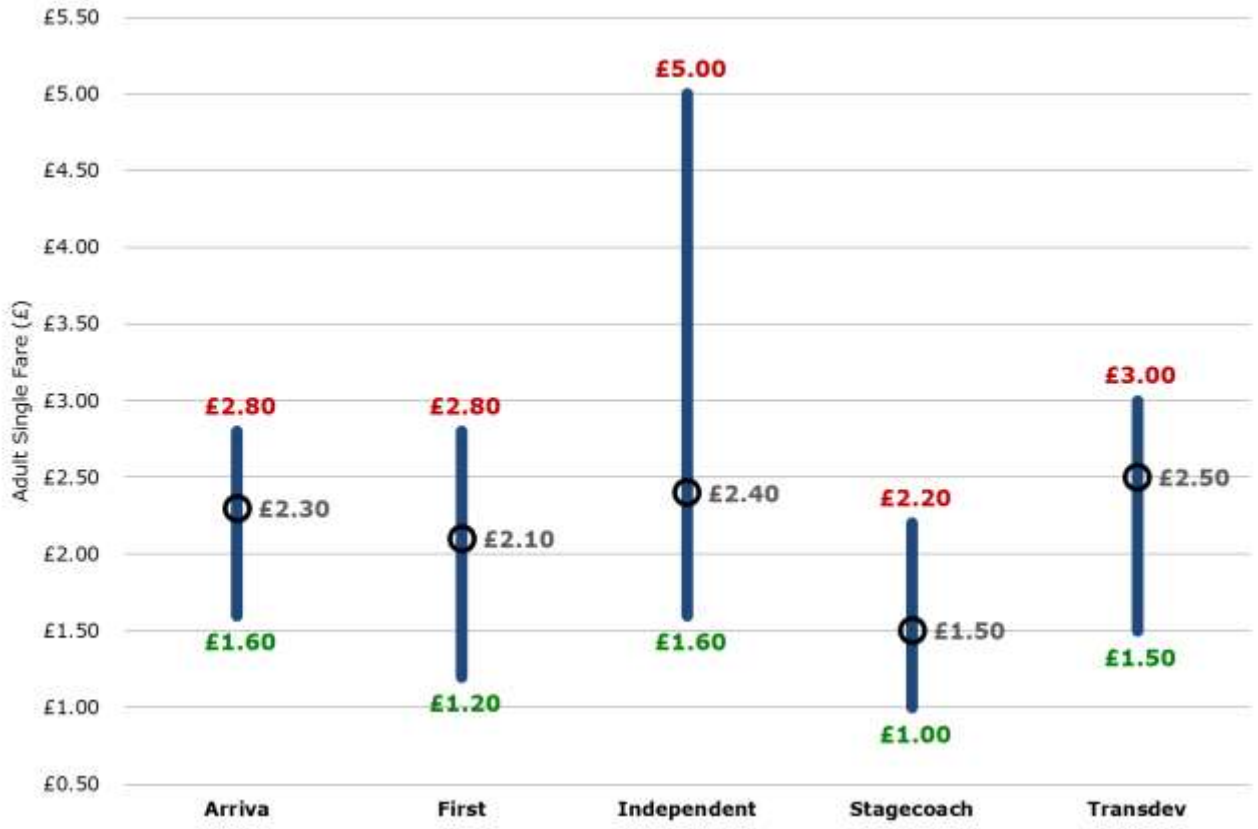


Table 12: Summary Analysis: Operator Single Fares by Region

Minimum Range	Lowest Actual Fare	Lowest Median Fare	Highest Median Fare	Highest Actual Fare	Maximum Range
East England (Figure N)					
£0.60 Independent	**£1.10** Stagecoach	**£1.80** Municipal	**£2.50** First	**£3.40** First	**£2.10** First
East Midlands (Figure O)					
£0.30 Municipal	**£1.25** Stagecoach	**£1.70** Municipal	**£2.40** Independent	**£3.00** Stagecoach	**£1.75** Stagecoach
North East England (Figure P)					
£0.90 Stagecoach	**£1.25** Go-Ahead	**£1.95** Arriva/ Go-Ahead	**£2.10** Stagecoach	**£3.00** Arriva	**£1.50** Arriva
North West England (Figure Q)					
Zero Independent	**£1.30** Stagecoach	**£1.70** Independent	**£3.10** First	**£3.80** First	**£2.00** Stagecoach
Scotland (Figure R)					
Zero Muncipal/ Nat Express	**£0.80** Stagecoach	**£1.50** Municipal	**£2.20** National Express	**£2.75** Independent	**£1.90** Stagecoach
South East England (Figure S)					
£0.10 Municipal	**£1.30** Arriva/ Stagecoach	**£1.80** Municipal	**£2.50** Independent	**£3.50** Go-Ahead	**£2.10** Arriva
South West England (Figure T)					
£0.60 Municipal	**£1.00** First	**£1.60** Municipal	**£2.35** First	**£4.00** First	**£3.00** First
Wales (Figure U)					
£0.80 Municipal	**£1.20** Independent	**£1.70** Municipal	**£2.90** First	**£4.40** Independent	**£3.20** Independent
West Midlands (Figure V)					
Zero Independent	**£1.60** Arriva/ First	**£1.85** Stagecoach	**£2.00** Arriva/First/ Nat Express	**£2.70** Stagecoach	**£1.00** Stagecoach
Yorkshire/Humber (Figure W)					
£1.20 Arriva/ Stagecoach	**£1.00** Stagecoach	**£1.50** Stagecoach	**£2.50** Transdev	**£5.00** Independent	**£3.40** Independent

6.2.5 Our analysis highlights the following:

6.2.6 **Minimum fare:** Stagecoach offers the lowest actual single fares in six of the ten regions (including South East England shared with Arriva). The range of minimum median single fares is £0.80;

6.2.7 **Maximum fare:** Independent operators (Scotland; Wales; Yorkshire/Humber) and First (East England; North West England; South West England) offer the highest single fares in three regions apiece. Despite offering more lowest regional fares than other operators, Stagecoach has two highest single fare regions (East and West Midlands);

6.2.8 **Median single fares:** The lowest median single fare is £1.50, offered by Municipal operators (Scotland) and Stagecoach (Yorkshire/Humber). Municipal operators account for lowest median single fares in six regions. This contrasts with the highest median single fare of £3.10 offered by First in North West England, who offer the highest median single in four regions – more than any other operator group;

6.2.9 **Total sample range:** The region with the largest range in single fares is Yorkshire/Humber (£4.00 range; including the 2013 survey's highest single value fare of £5.00), whilst the smallest range in single fares is the West Midlands (£0.90).

6.2.10 **TAS Comment:** Stagecoach continues to offer the lowest fares compared to other operator groups in UK regions outside London. Despite this, the Midlands market shows Stagecoach in contrasting lights – it has the lowest and highest median fares in an extremely competitive market. Of note, however, are the remaining municipal operators who continue to have the lowest median single fares in most of the regions in which they operate; aside, that is, from North West England where they are triple the number.

6.2.11 There may be some historical basis in the regional performance of both Arriva and Go-Ahead in the North East and South East regional markets; both groups have founding operations in the former, and have acquired extensively in the latter. Whilst Go-Ahead maintains lower fares in the North East, it has the highest fares in the South East; Arriva is the opposite.

6.3 Day and Weekly Tickets by Region

Overall Findings

6.3.1 Table 13 summarises the median ratios (trip rates) between single fare, day tickets and weekly tickets across the three surveys (2009, 2011 and 2013) for each GB region (including London):

6.3.2 **Day-to-Single ticket ratios:** Customers in four regions (East England; London; North-West England; and South-West England) start to achieve savings against the cost of equivalent single trip purchases on the second journey. The remaining customers begin to make savings on their third single journey, with North-East England offering the lowest potential saving;

6.3.3 **Week-to-Single ticket ratios:** Customers in North West England start to achieve savings against the cost of equivalent single trip purchases on their sixth journey – the best of any region. In comparison, customers in North East England start to achieve savings on their tenth (and final) journey of the week. Most of the remaining regions, including London, begin to offer savings on the eighth and ninth trip;

6.3.4 **Week-to-Day ticket ratios:** Most regions offer customers savings on their fourth day (i.e. purchasing a weekly ticket compared to purchasing four day tickets). In four regions (East England; London; South West England; and West Midlands), customers make savings on the fifth, and final, day of the week.

Table 13: Day and Weekly Ticket Multipliers, 2013

Market	Day-to-Single			Week-to-Single			Week-to-Day		
	2009	2011	**2013**	2009	2011	**2013**	2009	2011	**2013**
East England	1.8	2.1	**1.9**	6.9	7.4	**7.7**	3.8	3.5	**4.0**
East Midlands	2.1	1.9	**2.0**	7.8	7.5	**7.6**	3.7	3.9	**3.8**
London	1.9	1.8	**1.8**	6.9	8.1	**8.2**	3.6	4.5	**4.5**
North East	2.2	2.2	**2.4**	8.8	8.6	**9.2**	3.9	4.0	**3.9**
North West	1.9	2.0	**1.8**	6.1	7.0	**5.9**	3.1	3.5	**3.3**
Scotland	2.4	2.0	**2.2**	8.4	8.0	**8.6**	3.5	4.1	**3.9**
South East	2.5	2.1	**2.1**	8.3	8.4	**8.3**	3.3	4.0	**3.9**
South West	2.5	2.0	**1.8**	9.1	7.9	**8.0**	3.6	3.9	**4.4**
Wales	2.6	2.0	**2.0**	7.1	6.7	**6.7**	2.7	3.3	**3.3**
West Midlands	2.1	2.0	**2.0**	8.4	8.1	**7.8**	4.0	4.0	**4.0**
York/Humber	2.1	2.2	**2.1**	7.2	8.4	**7.9**	3.5	3.8	**3.7**

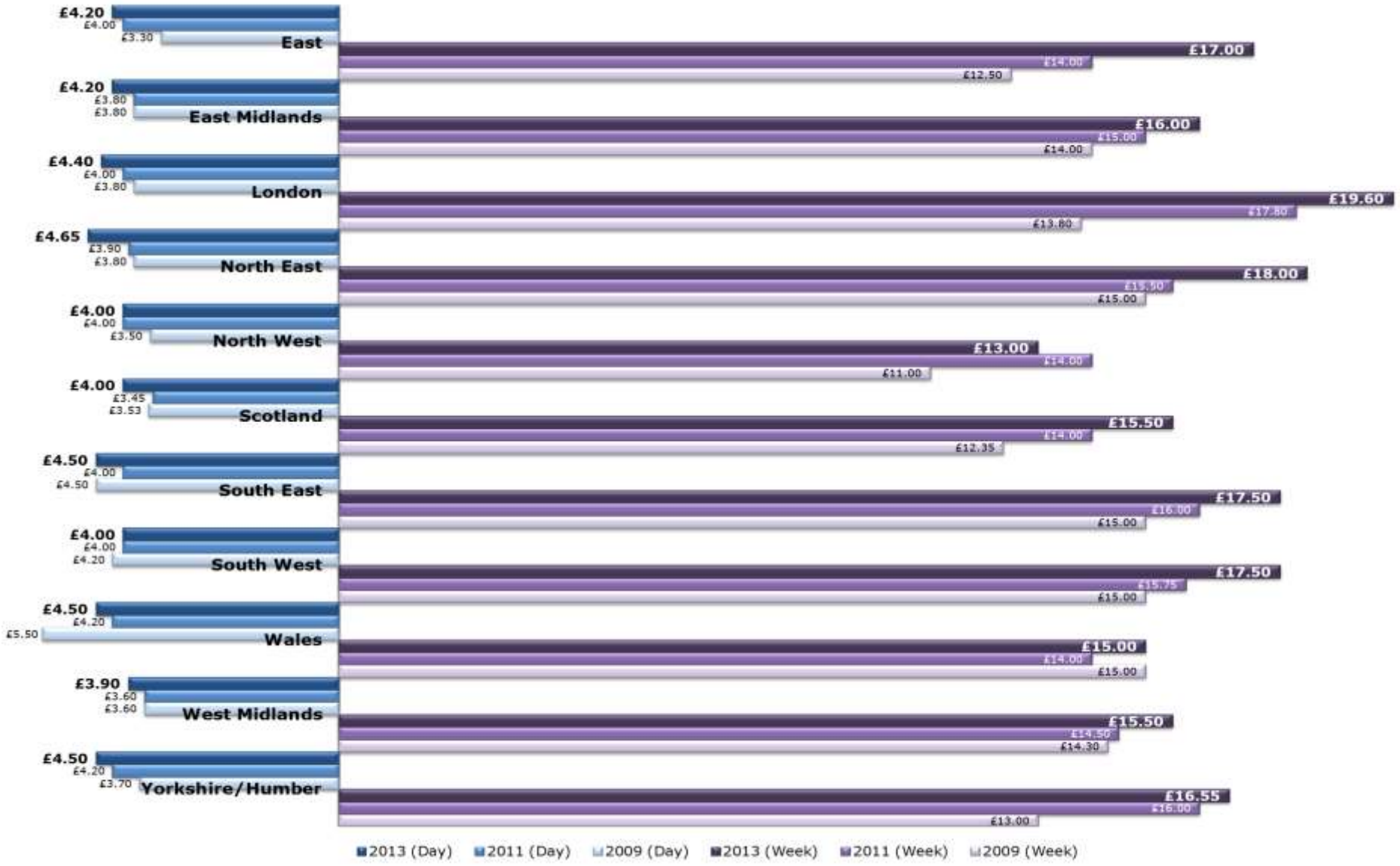
Trends

6.3.5 Figure X illustrates the trends in median day and weekly ticket data by GB region over the previous three surveys:

6.3.6 **Day tickets:** The median day ticket value is highest in north-east England (£4.65) – a significant increase over the previous survey (£3.90; 2011). In comparison, the West Midlands has the lowest median day ticket value in the 2013 survey (£3.90), £0.10 better than Scotland which had the lowest median day ticket values in the previous surveys;

6.3.7 **Weekly tickets:** The median weekly ticket value is highest in London (£19.60), which has the highest value in the previous survey. The North West of England has the lowest median weekly ticket value (£13.00) – a decrease of £1.00 since the previous survey, but consistently the lowest over the previous three surveys.

Figure X: Day and Weekly Tickets by Region, 2009-2013



6.4 Pricing and Discounts: Urban and Non-Urban Regional Services

6.4.1 Table 14 provides a summary analysis of day and weekly ticket pricing discounts and trip multipliers by GB region, comparing those services operating in predominantly urban, and non-urban, markets. For consistency, median values have been used for single, day and weekly ticket multiplier calculations.

Table 14: Regional Pricing and Discounts, 2013

Market	Day Ticket Analysis			Weekly Ticket Analysis			Day to Week Multiplier
	Median Ticket	Discount	Multiplier	Median Ticket	Discount	Multiplier	
Urban Services							
East England	£2.00	13.0%	**1.7**	£1.60	30.4%	**7.0**	**4.0**
East Midlands	£2.10	0.0%	**2.0**	£1.60	23.8%	**7.6**	**3.8**
London	£2.20	8.3%	**1.8**	£1.96	18.3%	**8.2**	**4.5**
NE England	£2.10	-7.7%	**2.2**	£1.63	16.4%	**8.4**	**3.9**
NW England	£2.00	9.1%	**1.8**	£1.30	40.9%	**5.9**	**3.3**
Scotland	£1.75	2.8%	**1.9**	£1.55	13.9%	**8.6**	**4.4**
SE England	£2.20	-4.8%	**2.1**	£1.70	19.0%	**8.1**	**3.9**
SW England	£2.00	9.1%	**1.8**	£1.65	25.0%	**7.5**	**4.1**
Wales	£1.90	13.6%	**1.7**	£1.50	31.8%	**6.8**	**3.9**
West Midlands	£1.95	2.5%	**2.0**	£1.55	22.5%	**7.8**	**4.0**
Yorks/Humber	£2.25	-7.1%	**2.1**	£1.52	27.6%	**7.2**	**3.4**
Variation	*28.6%*		*24.7%*	*50.8%*		*45.7%*	*37.1%*
GB Average	**£2.16**	**-2.7%**	**2.1**	**£1.57**	**25.4%**	**7.5**	**3.6**
Non-Urban Services							
East England	£3.00	-42.9%	**2.9**	£2.35	-11.9%	**11.2**	**3.9**
East Midlands	£2.75	-25.0%	**2.5**	£1.90	13.6%	**8.6**	**3.5**
NE England	£2.33	-19.2%	**2.4**	£1.80	7.7%	**9.2**	**3.9**
NW England	£2.05	10.9%	**1.8**	£1.45	37.0%	**6.3**	**3.5**
Scotland	£3.50	-100.0%	**4.0**	£2.22	-26.6%	**12.7**	**3.2**
SE England	£3.00	-50.0%	**3.0**	£1.95	2.5%	**9.8**	**3.3**
SW England	£3.60	-71.4%	**3.4**	£2.00	4.8%	**9.5**	**2.8**
Wales	£2.50	-8.7%	**2.2**	£1.90	17.4%	**8.3**	**3.8**
West Midlands	£3.00	-57.9%	**3.2**	£1.92	-1.1%	**10.1**	**3.2**
Yorks/Humber	£2.88	-26.4%	**2.5**	£1.98	13.2%	**8.7**	**3.4**
Variation	*75.6%*		*124.4%*	*62.1%*		*100.8%*	*41.0%*
GB Average	**£3.15**	**-46.1%**	**2.9**	**£2.02**	**6.2%**	**9.4**	**3.2**

Urban Markets

6.4.2 Our analysis of discounts and trip multipliers for urban regional services (including London for comparison) shows that:

6.4.3 **For day tickets:** In six of the eleven regions, customers will begin to make savings on their second (possibly return) journeys. For the remaining five regions, mostly located in the Midlands and east GB, customers begin to make savings on their third single journey equivalent. Customers appear to pay a premium for day tickets in three regions (North East England; South East England; and Yorkshire/Humber);

6.4.4 **For weekly tickets:** Customers in North-West England and Wales begin to make savings on their sixth and seventh single trip equivalent journeys respectively for weekly tickets. In contrast, weekly ticket customers in London, North-east England, Scotland and South East England make savings on their ninth single trip journey of the week. In terms of discount, North West England customers get the largest discount against single trips (over 40%), compared to Scottish customers with the smallest discount (13%);

6.4.5 For week-to-day trip multipliers, most customers make savings starting on the fourth day of the week apart from five regions (East England; London; Scotland; South West England; and West Midlands) where savings start on the fifth day.

Non-Urban Services

6.4.6 Our analysis of discounts and trip multipliers for regional non-urban services (excluding London) shows that:

6.4.7 **For day tickets:** Customers on non-urban services in North West England make savings on their second journey; the best offer compared to all other regions. Whilst the GB average multiplier is much higher for non-urban than urban services generally, for customers on non-urban services, four or five journeys would have to be made on a day ticket to make a saving against the purchase of single fares. These results are reflected in the discount saving; only customers purchasing day tickets in the north-west England make a discount purchasing a day ticket as opposed to buying single trip tickets – conversely, customers in all other regions appear pay a premium;

6.4.8 **For weekly tickets:** As for day tickets, the same results can be found – customers in north-west England make savings quicker by purchasing weekly tickets as opposed to single fares, compared to those in Scotland who on average need to make thirteen journeys on a weekly ticket to start and make a saving. In contrast to urban regional services, whilst most customers make a discount against purchasing weekly tickets compared to single tickets, those in East England, Scotland and the West Midlands appear to pay a premium;

6.4.9 For week-to-day multipliers, most customers appear to make a saving on their fourth day, compared to south-west England where customers start making savings on the third day.

6.5 Summary

6.5.1 We have completed an analysis of adult single, day and weekly tickets – and determined the median equivalent values – for each GB region. In summary, our 2013 survey sample highlights the following:

- The median single fare has increased for all regions across all three TAS fares surveys. London has the highest median single fare at £2.10; Scotland has the lowest single fare (£0.80), whilst the Yorkshire/Humber region has the greatest range of single fares (£4.00) and the highest fare in the survey (£5.00);
- Whilst Stagecoach offers the lowest actual single fares in most GB regions, municipal bus operators offer the lowest median single fares. In contrast, First offers the most highest median single fares and, with independent operators, the highest actual single fares in most GB regions;
- Median day and weekly tickets in GB regions have generally risen across all three surveys. However, customers in North West England, on both urban and non-urban services, see savings for such purchases against the cost of single trip purchases sooner than elsewhere in GB (the second journey on day tickets, and sixth/seventh journey on weekly tickets);
- Customers purchasing day tickets in both North East England and South East England generally tend to pay a premium on both urban and non-urban services. In general, the discounts offered on both day and weekly tickets are far less on non-urban services than urban services.

Analysis by Operator 7

7.1 Introduction

7.1.1 This section presents our analysis of the 2013 survey data by operator, divided into groups according to ownership. The operators were selected from the TAS Bus Industry Monitor series and include:

- The six major private transport groups: **Arriva, First, Go-Ahead, National Express, Stagecoach** and **Transdev**;
- Smaller private transport groups and large independents (collectively referred to as **Independent**), e.g. East Yorkshire Motor Services, Rotala and trentbarton;
- Local authority owned operators (collectively referred to as **Municipal**) including Lothian Buses, Reading Buses and Warrington Borough Transport.

7.2 Single Fares by Operator

Distribution of Fares

7.2.1 The range of adult single fares by operator is shown in Figure Y, annotated with minimum fare (green); maximum fare (red); and the median single fare within the operator dataset. The largest range of tickets (£4.00 between highest and lowest) was found in the Independent operator group, with the smallest range (£0.20) in National Express. The Independent group also had the highest single fare (£5.00), with Stagecoach having the lowest single fare (£0.80). In comparing all operator groups, the municipal group has the lowest median single fare (£1.70) with Transdev the highest (£2.50). The range of median single fares amongst the major private transport groups is £0.50.

Trends in Fares

7.2.2 Figure Z illustrates the trends in median single fare data by operator group over the previous three surveys. Transdev has had the highest median single fare over the previous two surveys, although First had the highest fare in the 2009 survey. The municipal operator group has had the lowest median fare over the previous two surveys (the independent operator group having the lowest in 2009).

Analysis by Operator and Region

7.2.3 We have provided additional analysis of median single fares for each region by operator group (except for London), in Figures AA to HH inclusive below. Table 15 provides a summary of the key findings, together with a short commentary on our observations.

Figure Y: Range of Single Fares by Operator

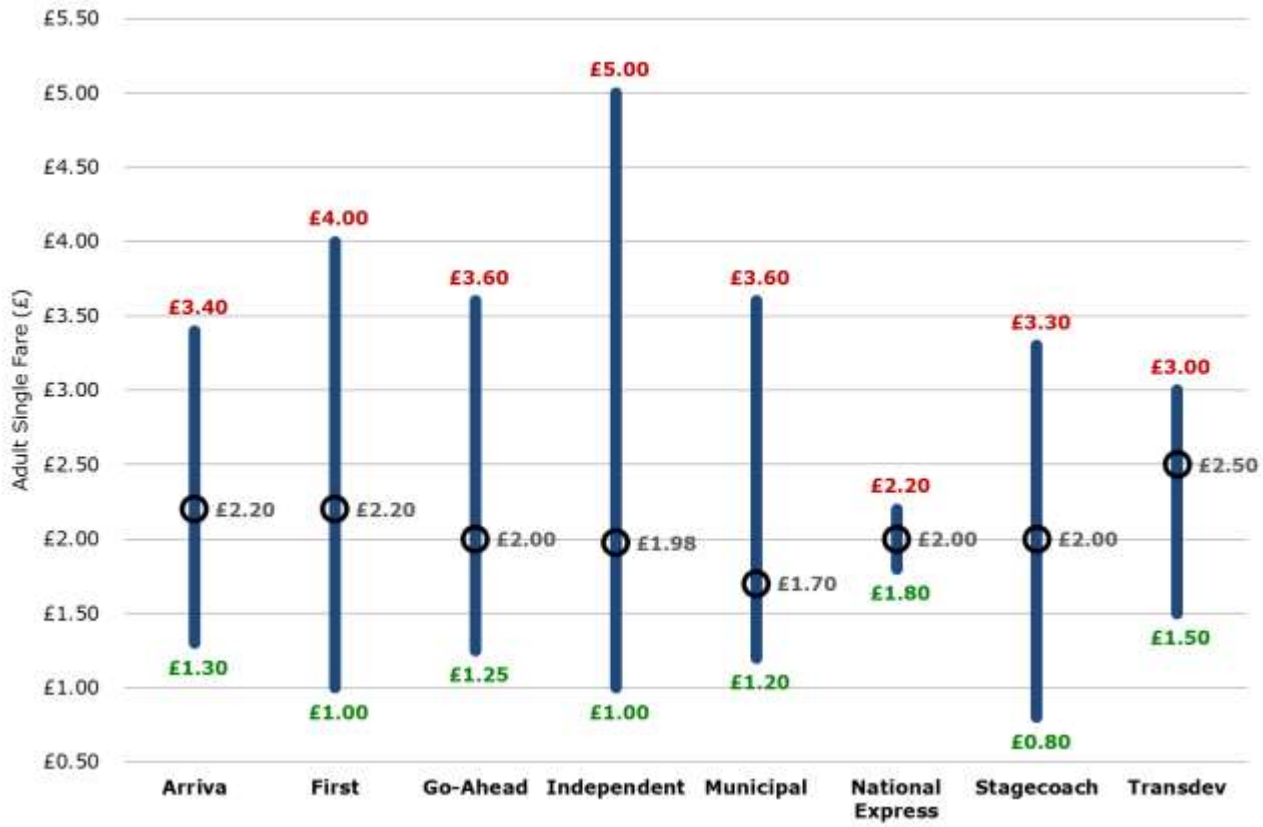


Figure Z: Single Fares by Operator, 2009-2013

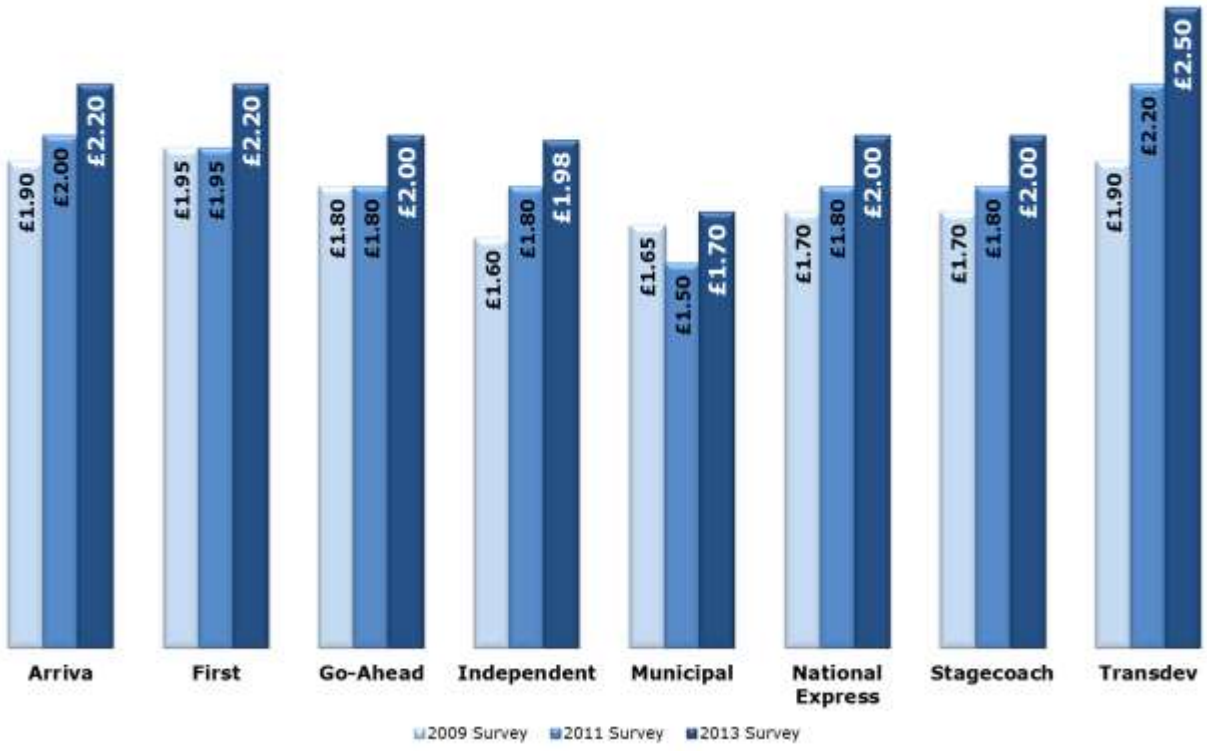


Figure AA: Arriva – Range of Single Fares by Region

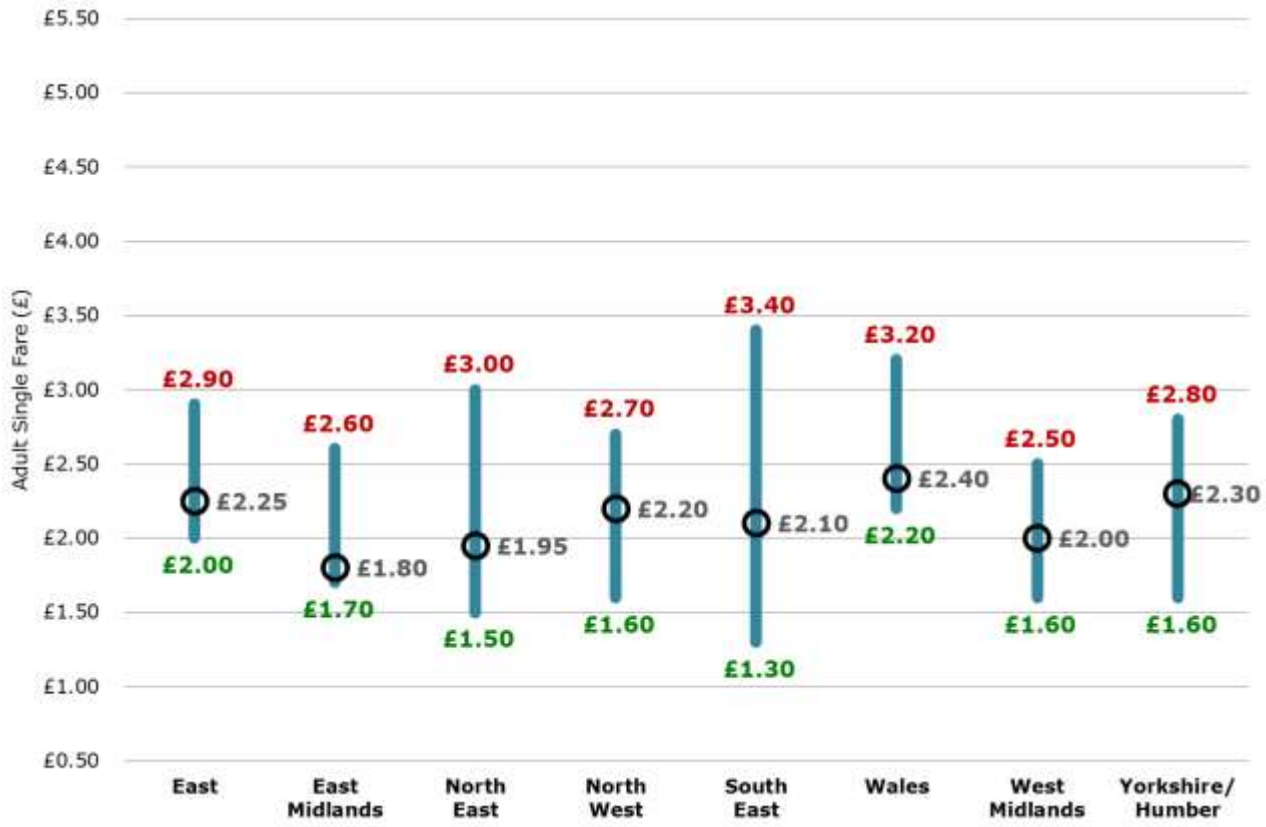


Figure BB: First – Range of Single Fares by Region

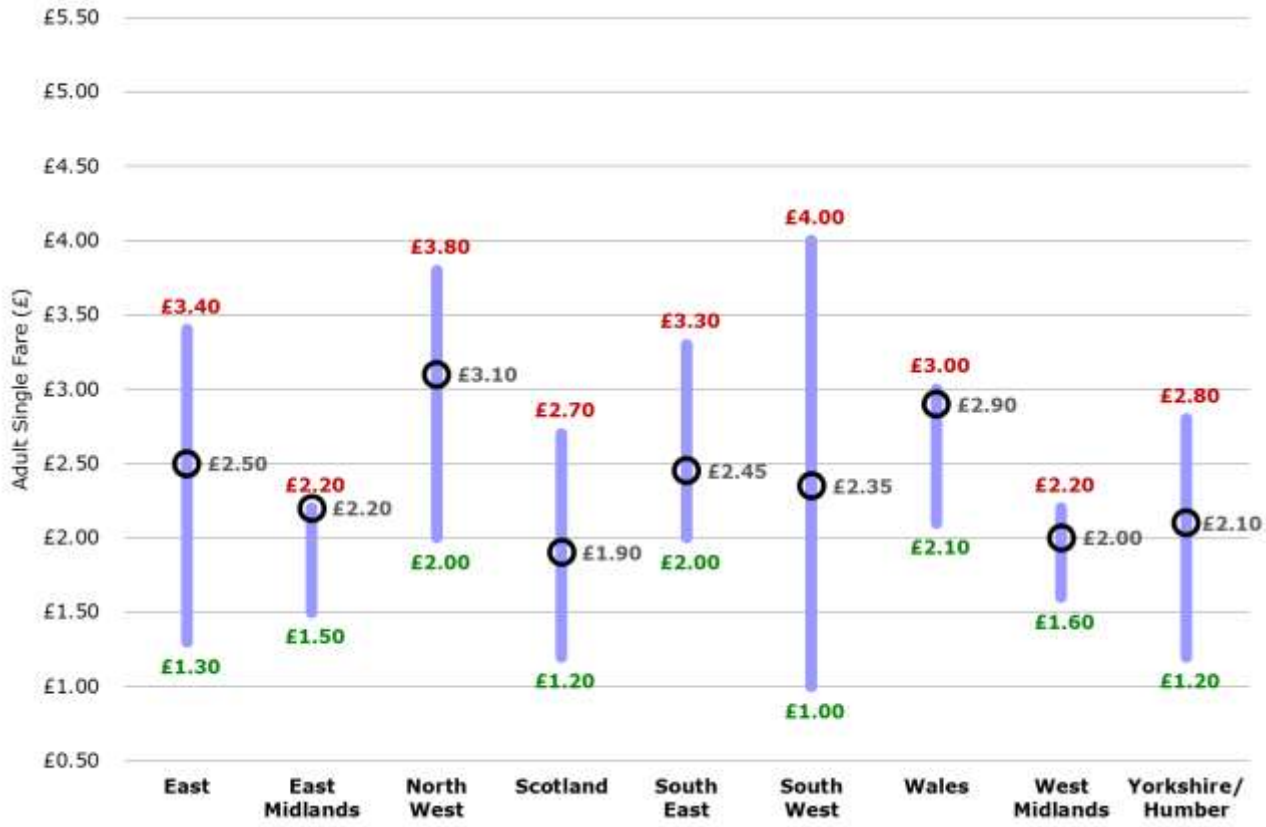


Figure CC: Go-Ahead – Range of Single Fares by Region

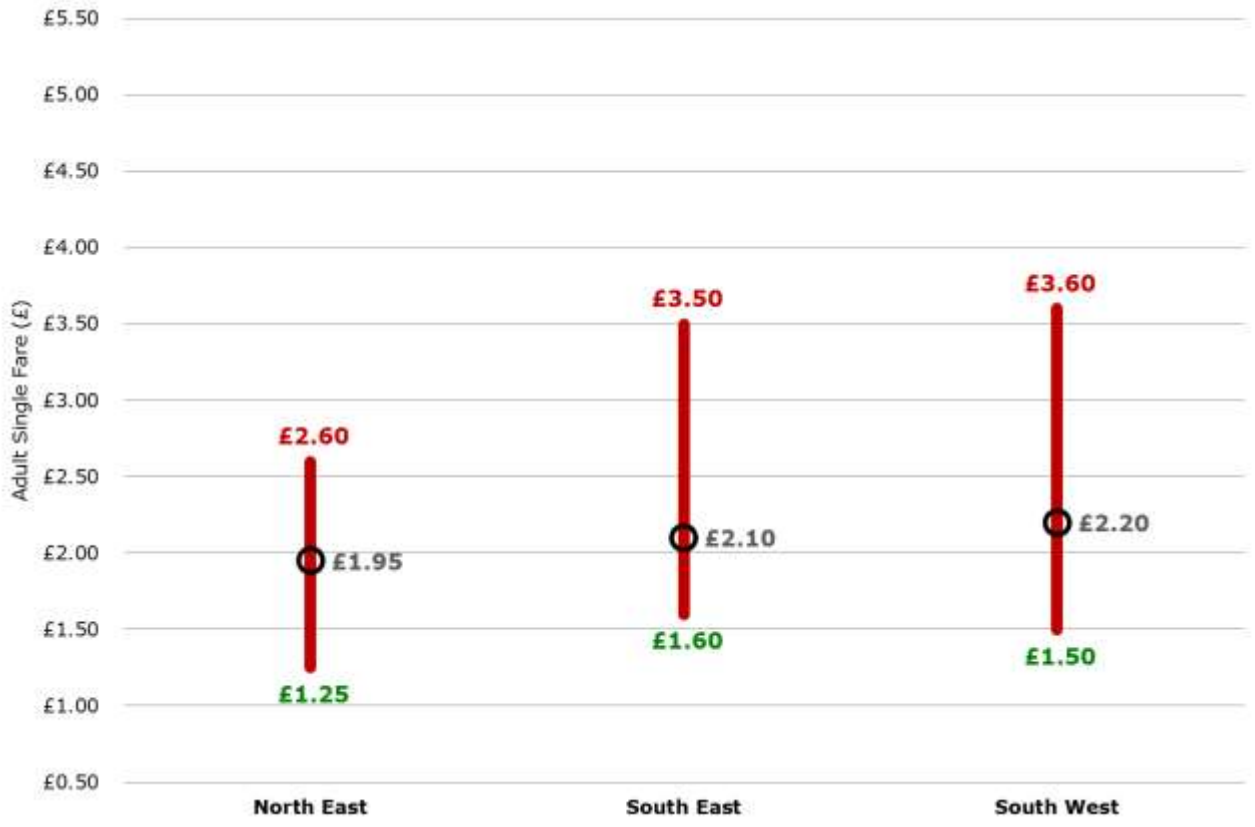


Figure DD: Independent Operators – Range of Single Fares by Region

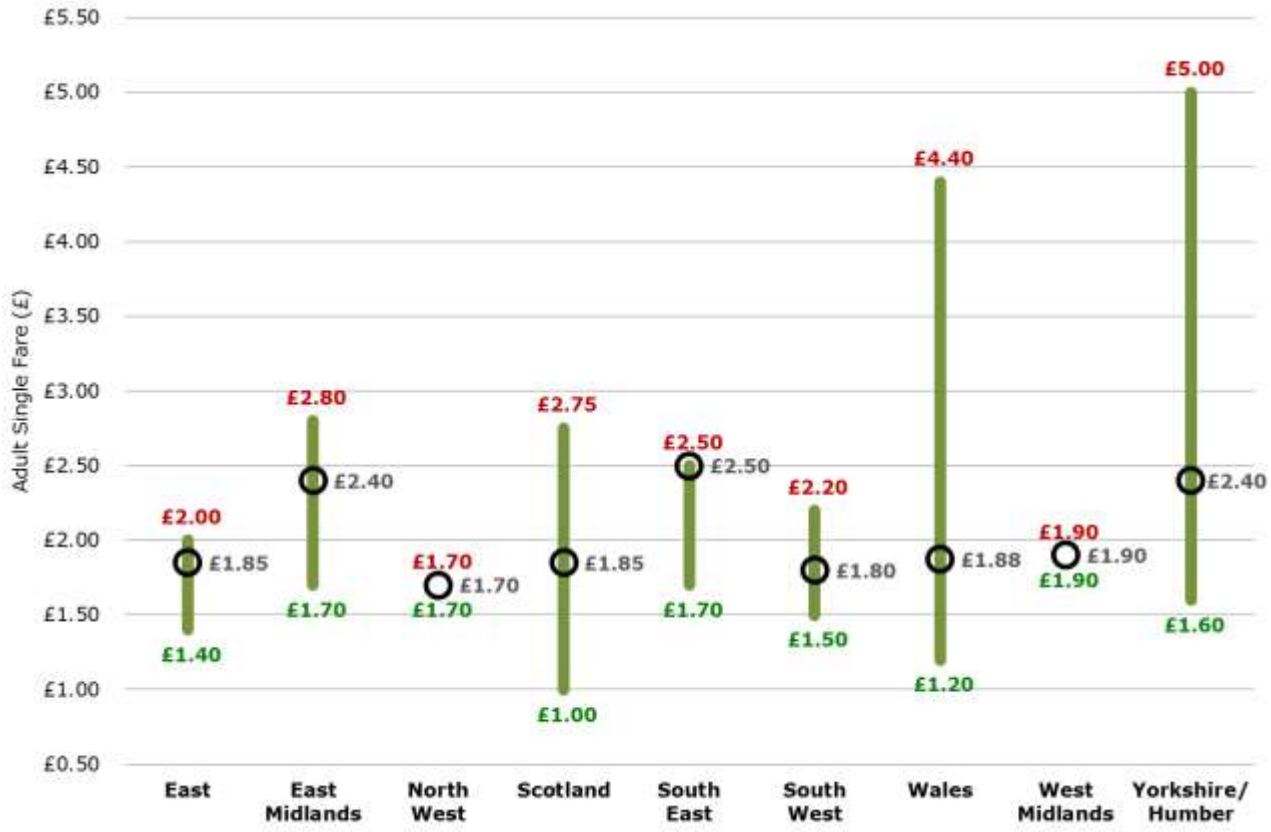


Figure EE: Municipal Operators – Range of Single Fares by Region

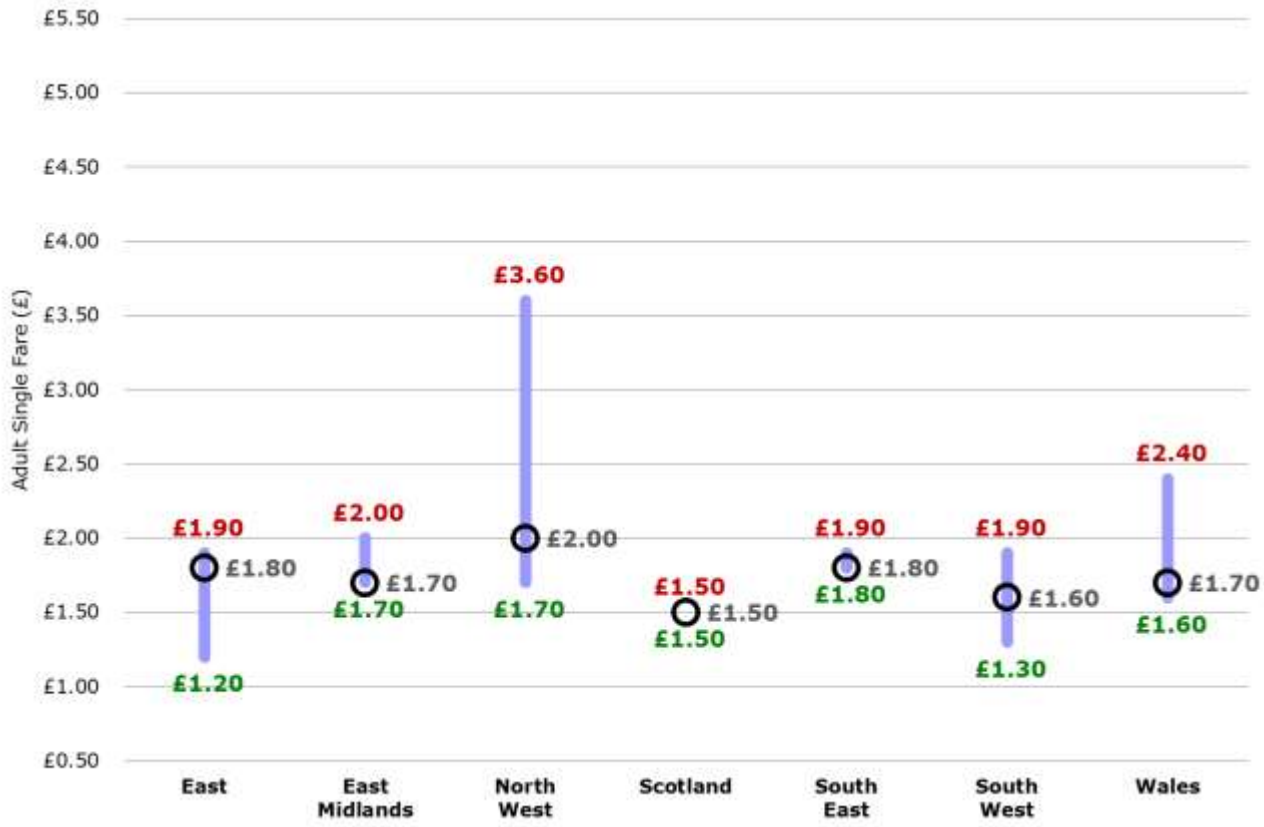


Figure FF: National Express – Range of Single Fares by Region

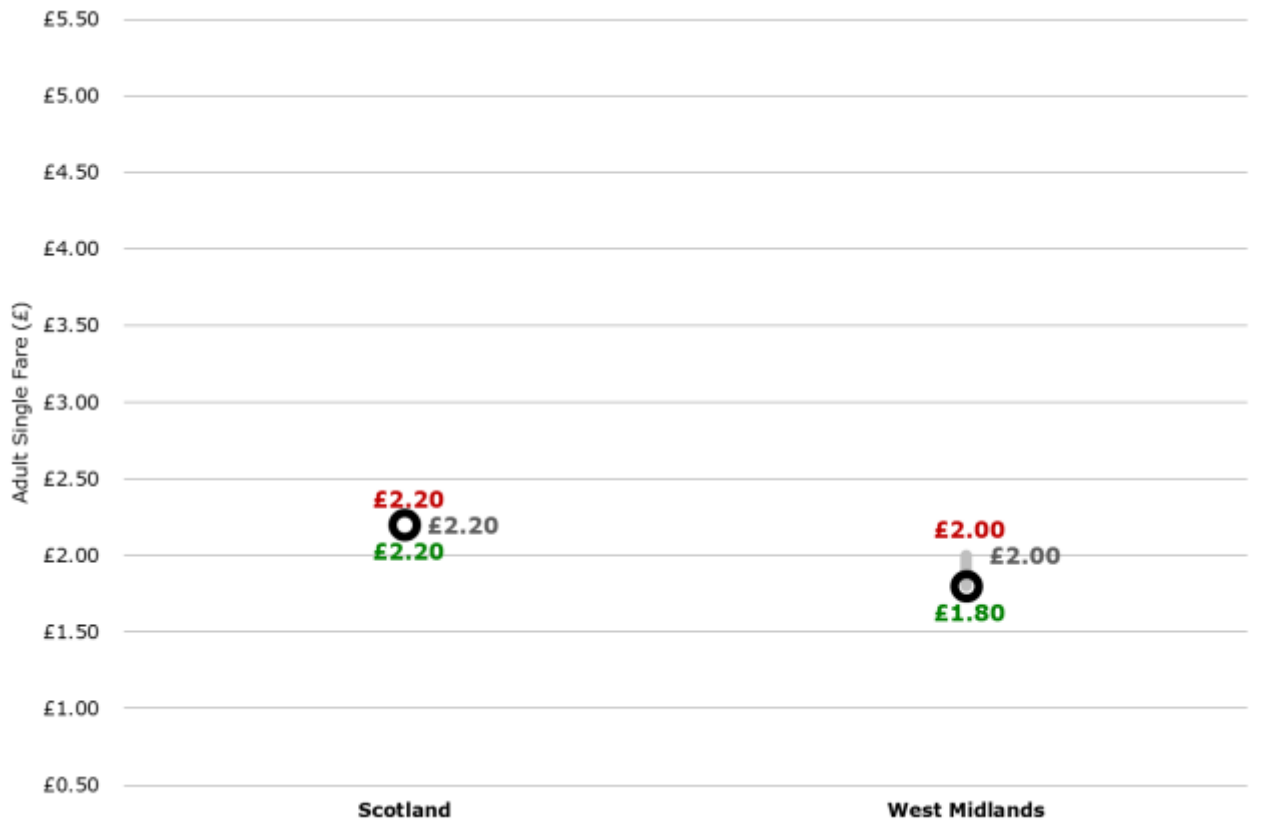


Figure GG: Stagecoach – Range of Single Fares by Region

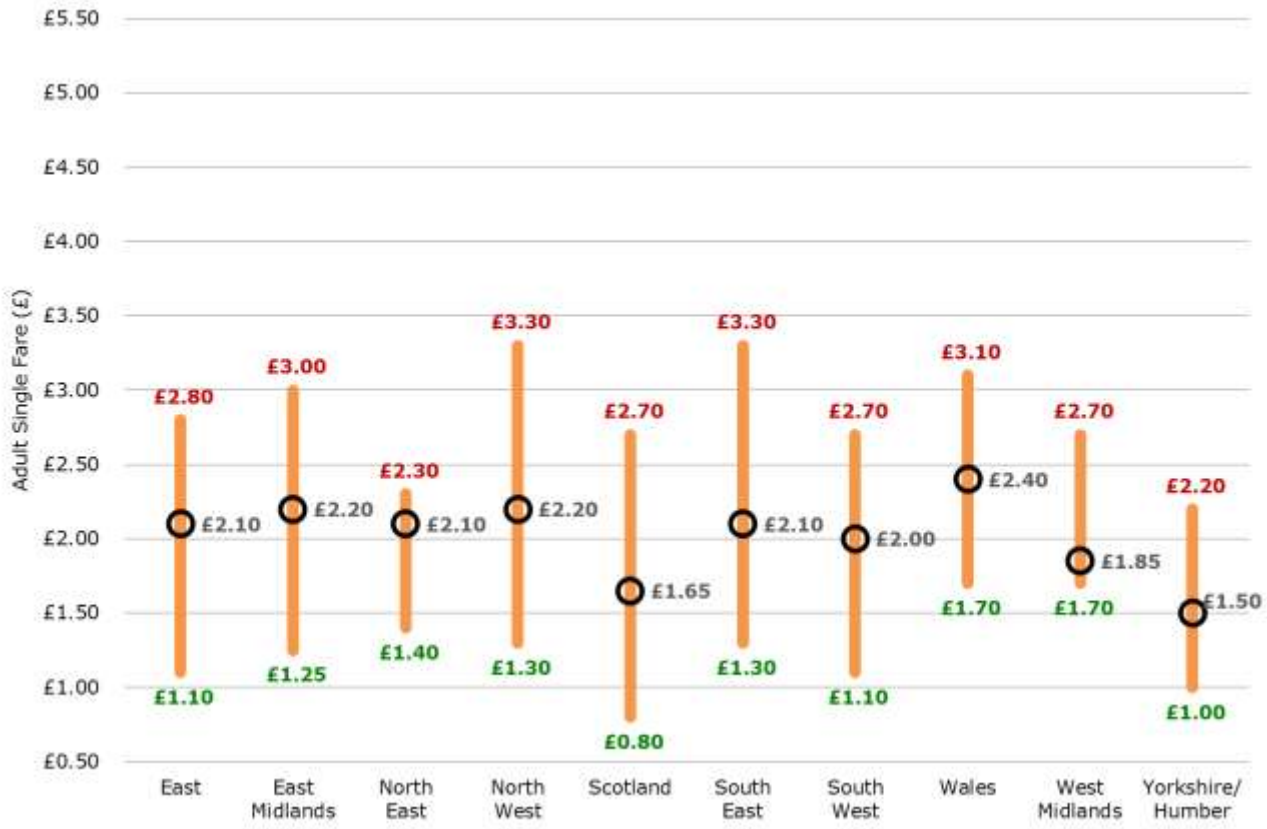


Figure HH: Transdev – Range of Single Fares by Region

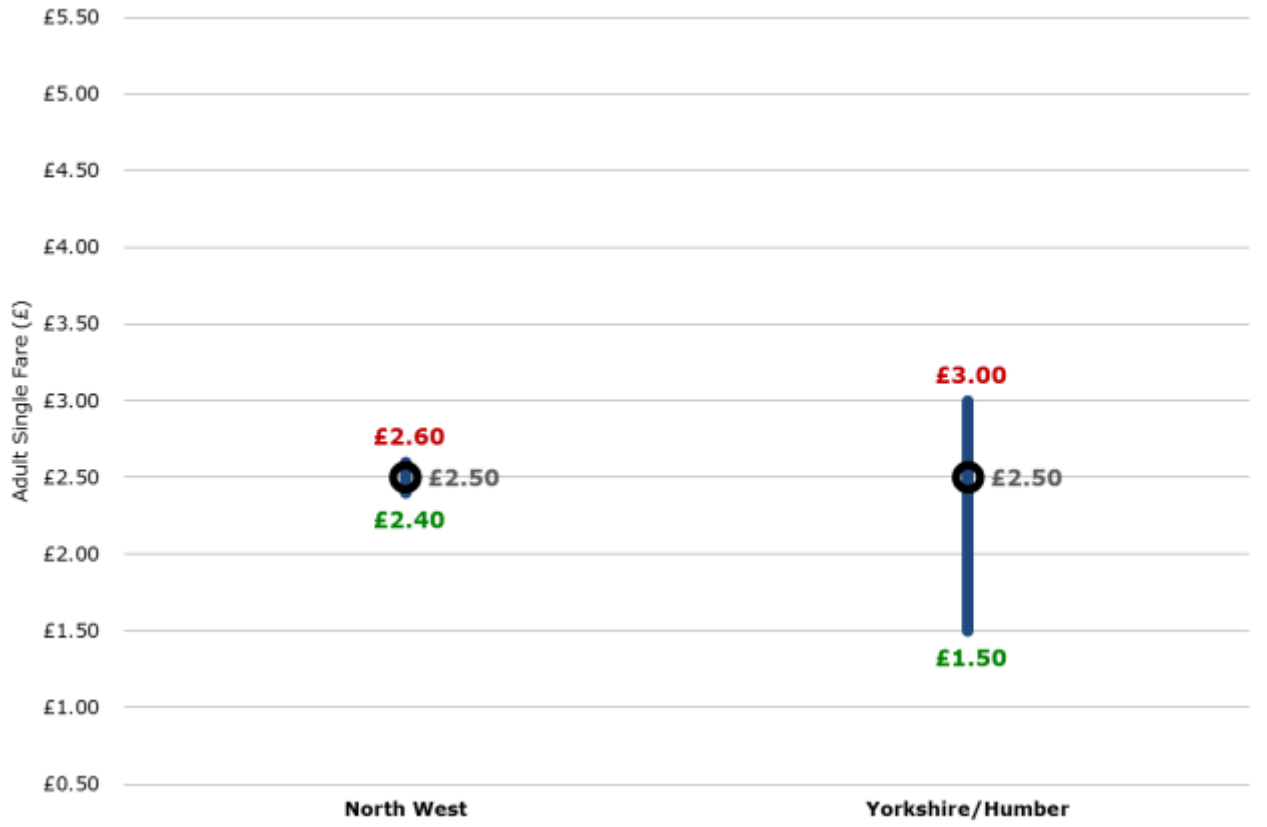


Table 15: Summary Analysis: Regional Single Fares by Operator

Minimum Range	Lowest Actual Fare	Lowest Median Fare	Highest Median Fare	Highest Actual Fare	Maximum Range
Arriva					
£0.90 E England/ Midlands	**£1.30** SE England	**£1.80** East Midlands	**£2.40** Wales	**£3.40** SE England	**£2.10** SE England
First					
£0.60 West Midlands	**£1.00** SW England	**£1.90** Scotland	**£3.10** NW England	**£4.00** SW England	**£3.00** SW England
Go-Ahead					
£1.35 NE England	**£1.25** NE England	**£1.95** NE England	**£2.20** SW England	**£3.60** SW England	**£2.10** SW England
Independent					
Zero NW England/ W Midlands	**£1.00** Scotland	**£1.70** NW England	**£2.50** SE England	**£5.00** Yorks/Humber	**£3.40** Yorks/Humber
Municipal					
Zero Scotland	**£1.20** E England	**£1.50** Scotland	**£2.00** NW England	**£3.60** NW England	**£2.90** NW England
National Express					
Zero Scotland	**£1.80** W Midlands	**£2.00** W Midlands	**£2.20** Scotland	**£2.20** Scotland	**£0.20** W Midlands
Stagecoach					
£0.90 NE England	**£0.80** Scotland	**£1.50** Yorks/Humber	**£2.40** Wales	**£3.30** NW England/ SE England	**£2.00** NW England/ SE England
Transdev					
£0.20 NW England	**£1.50** Yorks/Humber	**£2.50** NW England/ Yorks/Humber	**£2.50** NW England/ Yorks/Humber	**£3.00** Yorks/Humber	**£1.50** Yorks/Humber

7.2.4 Our analysis highlights the following:

- **Actual single fares**: Scotland has the lowest actual single fare (£0.80) offered by Stagecoach. In contrast, Yorkshire/Humber has the highest actual single fare (£5.00) offered by an Independent operator;
- **Median single fares**: Three regions (North West England; Scotland; Yorkshire/Humber) have the lowest median single fares in the survey, with Transdev featuring in two of those regions. In contrast, North West England also has three operators whose median single fares are the highest (First, Municipal operators and Transdev);

- **Range**: National Express offers the smallest range of single fares (£0.40), albeit limited to markets in Scotland and the West Midlands. Independent operators have the largest range of single fares (£4.00); of the remaining major transport groups, Transdev has the smallest range (£1.50) and First the largest range (£3.00) across all GB operations (excluding London).

7.2.5 **TAS Comment**: Whilst Stagecoach offers most lowest single fares in GB markets and regions, there is considerable range within its own operations; it is second highest to First in GB, and has one of the highest median single fares. Both National Express and Transdev have a relatively small range of single fares, perhaps reflecting operating territories.

7.3 Day and Weekly Tickets by Operator

Overall Findings

7.3.1 Table 16 summarises the median ratios (trip rates) between single fare, day tickets and weekly tickets across the three surveys (2009, 2011 and 2013) for each operator group (excluding London data from the analysis).

Table 16: Day and Weekly Ticket Multipliers, 2013

Operator Group	Day-to-Single			Week-to-Single			Week-to-Day		
	2009	2011	**2013**	2009	2011	**2013**	2009	2011	**2013**
Arriva	2.1	2.0	**1.9**	7.9	8.0	**8.0**	3.8	4.1	**4.1**
First	2.0	2.2	**1.8**	7.7	8.7	**7.7**	3.9	4.0	**4.3**
Go-Ahead	2.1	2.2	**2.3**	8.3	9.1	**9.0**	3.9	4.1	**3.9**
Independent	2.3	3.8	**2.1**	8.4	6.7	**7.3**	3.7	1.8	**3.5**
Municipal	2.3	2.3	**2.1**	8.3	10.3	**9.4**	3.6	4.6	**4.6**
Nat. Express	1.9	2.0	**2.0**	8.4	7.2	**7.0**	4.3	3.6	**3.6**
Stagecoach	2.2	2.1	**2.0**	6.5	6.6	**6.3**	3.0	3.2	**3.1**
Transdev	1.8	1.8	**2.3**	6.8	6.4	**8.0**	3.7	3.5	**3.4**

7.3.2 **Day-to-Single ticket ratios:** Customers using Arriva and First services start to achieve savings through purchasing a day ticket compared to single journey tickets on their second journey (possibly a return journey). For customers using the remaining operators, savings usually start on the third journey. For Arriva and First, this represents an improvement on previous surveys; Go-Ahead and Transdev have seen a corresponding decline;

7.3.3 **Week-to-Single ticket ratios:** Customers using Stagecoach start to achieve savings through purchasing a weekly ticket compared to single journey ticket purchases on their seventh journey in the week. In comparison, customers using Go-Ahead and Municipal operator services start to make savings on their tenth – and potentially last – weekly journey;

7.3.4 **Week-to-Day ticket ratios:** Most operator groups begin to offer savings to customers on the fourth day (purchasing a weekly ticket rather than five daily tickets); the exceptions are Arriva, First and Municipal operators whose customers make savings on the fifth – and potentially last – day of the week.

Trends

7.3.5 Figure II illustrates the trends in median day and weekly ticket data by operator group over the three previous surveys:

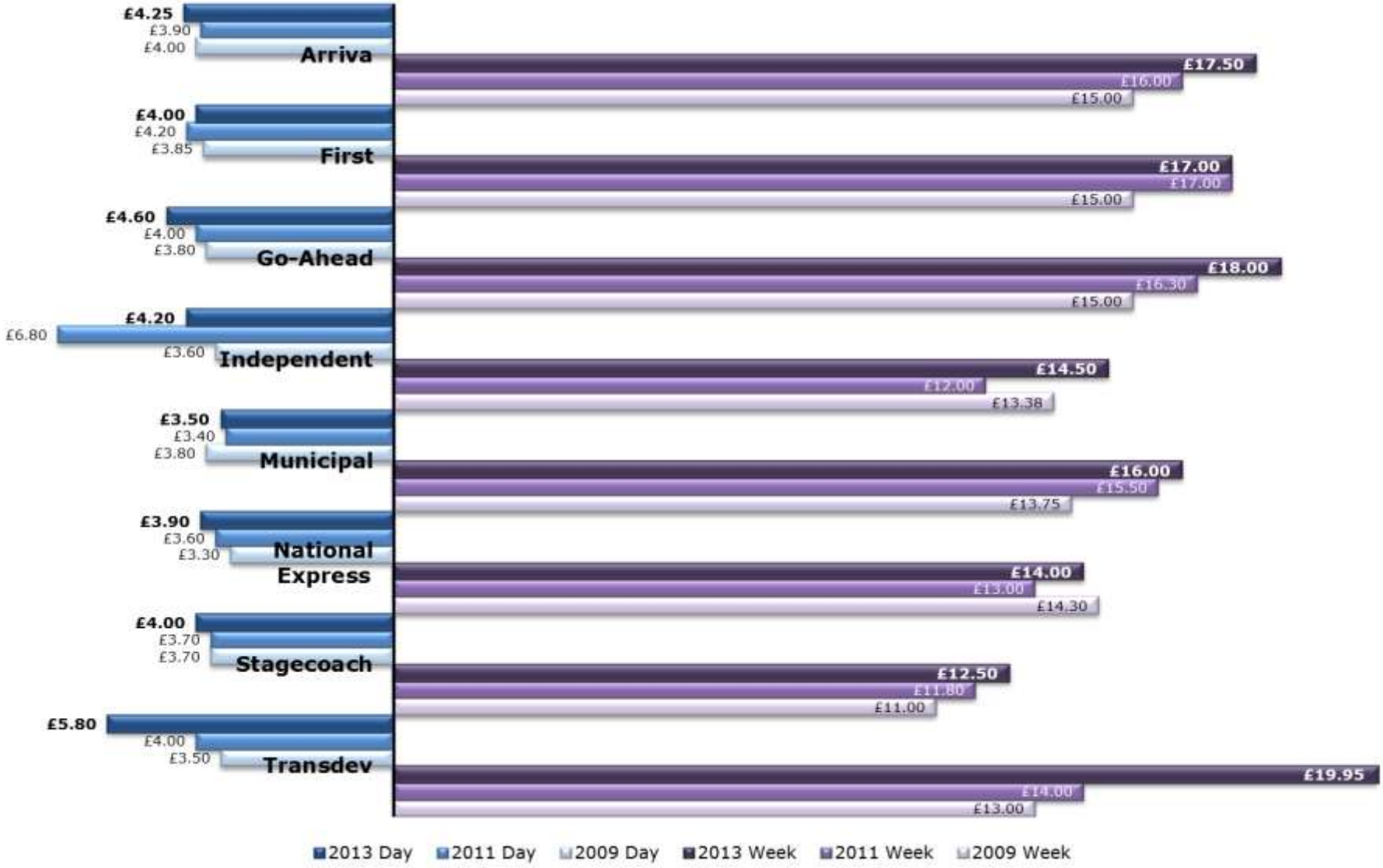
- **Day tickets**: Transdev has the highest median day ticket value (£5.80) amongst the operator groups – a substantial increase from the 2011 survey (£4.00). The Municipal operator group has the lowest median day ticket value (£3.50), although this represents a marginal increase since the last survey.

- Of the major transport groups considered in this survey, First is the only operator to have seen a fall in the median day ticket value between 2011 and 2013 (down £0.20 to a current median value of £4.00). This is comparable to Stagecoach, but greater than National Express who have a median day ticket value of £3.90. The range of median day tickets has decreased between 2011 and 2013, from £3.40 to £1.90 – implying that day ticket pricing has become less diverse.

- **Weekly tickets**: In addition to having the highest median day ticket, Transdev has the highest median weekly ticket (£19.95) – a substantial increase from the 2011 survey (£14.00). Stagecoach Megarider weekly tickets provide the lowest median week ticket (£12.50), for the third successive survey.

- Of the major transport groups considered in this survey, First is the only operator to have held its median weekly ticket price between the 2011 and 2013 surveys – all others have seen an increase between surveys. The range of weekly median day tickets has increased between 2011 and 2013, from £5.20 to £7.45 – implying that weekly ticket pricing has become more diverse.

Figure II: Day and Weekly Tickets by Operator, 2009-2013



7.4 Pricing and Discounts: Urban and Non-Urban Operator Services

7.4.1 Table 17 provides a summary analysis of day and weekly ticket pricing discounts and trip multipliers by operator group, comparing those services operating predominantly in urban, and non-urban, markets (excluding London). For consistency, median values have been applied to single, day and weekly ticket discount and trip multiplier calculations.

Table 17: Operator Pricing and Discounts, 2013

Operator Group	Day Ticket Analysis			Weekly Ticket Analysis			Day to Week Multiplier
	Day to Single Value	Discount	Multiplier	Week to Single Value	Discount	Multiplier	
Urban Services							
Arriva	£2.10	4.5%	**1.9**	£1.75	20.5%	**8.0**	**4.2**
First	£2.00	9.1%	**1.8**	£1.60	27.3%	**7.3**	**4.0**
Go-Ahead	£2.18	-8.7%	**2.2**	£1.80	10.0%	**9.0**	**4.1**
Independent	£1.75	10.3%	**1.8**	£1.45	25.6%	**7.4**	**4.1**
Municipal	£1.75	-2.9%	**2.1**	£1.60	5.9%	**9.4**	**4.6**
Nat. Express	£1.95	2.5%	**2.0**	£1.40	30.0%	**7.0**	**3.6**
Stagecoach	£1.95	2.5%	**2.0**	£1.25	37.5%	**6.3**	**3.2**
Transdev	£2.40	0.0%	**2.0**	£1.60	33.3%	**6.7**	**3.3**
Variation	*37.1%*		*21.2%*	*44.0%*		*50.6%*	*42.6%*
GB Average	**£2.00**	**0.0%**	**2.0**	**£1.50**	**25.0%**	**7.5**	**3.8**
Non-Urban Services							
Arriva	£3.00	-36.4%	**2.7**	£2.00	9.1%	**9.1**	**3.3**
First	£2.50	-22.0%	**2.4**	£2.00	2.4%	**9.8**	**4.0**
Go-Ahead	£3.75	-70.5%	**3.4**	£2.40	-9.1%	**10.9**	**3.2**
Independent	£4.25	-112.5%	**4.3**	£1.52	23.9%	**7.6**	**1.8**
Municipal	£2.00	0.0%	**2.0**	£1.85	7.5%	**9.3**	**4.6**
Stagecoach	£2.75	-37.5%	**2.8**	£1.90	5.0%	**9.5**	**3.5**
Transdev	£4.00	-60.0%	**3.2**	£3.20	-28.0%	**12.8**	**4.0**
Variation	*112.5%*		*112.5%*	*110.1%*	*-185.2%*	*68.1%*	*158.1%*
GB Average	**£3.00**	**-46.3%**	**2.9**	**£2.02**	**6.2%**	**9.4**	**3.2**

Urban Markets

7.4.2 Our analysis of discounts and trip multipliers for urban operator services (excluding London) shows that:

- **For day tickets**: Customers using Arriva, First and Independent operator services will begin to make savings on their second (and potentially return) journeys on urban services. For remaining operators, customers will see savings on their third journeys. For Go-Ahead and Municipal operator customers, customers will pay a premium on the cost of day tickets against equivalent single fare journeys;

- **For weekly tickets**: All operator customers will see a discount on the purchase of a weekly ticket against single journey transactions. Customers using Stagecoach and Transdev urban services will begin to make savings on their seventh journey, whilst those customers of Go-Ahead and Transdev will see savings on their tenth – and potential last – single trip of the week. In analysing week-to-day purchases, customers using National Express, Stagecoach and Transdev services will see potential savings on the fourth day of the week.

Non-Urban Markets

7.4.3 Our analysis of discounts and trip multipliers for operator non-urban services (again excluding London) shows that:

- **For day tickets**: Most customers will pay a premium if they purchase a day ticket compared to single journey transactions; only those customers using non-urban services provided by Municipal operators may see marginal benefit. Customers using Arriva, First, Muncipal operator and Stagecoach non-urban services will see a saving on their third journey using day tickets; for Independent operators, savings will start to accrue on the fifth journey of the day;

- **For weekly tickets**: Most customers will see a discount, except for Go-Ahead and Transdev customers who will pay a premium for weekly ticket purchases against single journey transactions. Customers using non-urban services operated by Independent operators will start to accrue savings on their eighth trip of the week, compared to Transdev customers who need to make thirteen trips before accruing savings. For week-to-day comparisons, the GB average is less than those for urban journeys; customers using Independent operator services will commence savings on the second day, whilst First, Muncipal operator and Transdev customers will see savings on the fifth – and potentially last – day of travel.

7.5 Summary

7.5.1 We have completed an analysis of adult single, day and weekly tickets – and determined the median equivalent values – for each bus operator group within GB. In summary, our 2013 survey sample highlights the following:

- The median single fare has increased for all operators between the 2011 and 2013 surveys;

- Transdev has the highest median single (£2.50), day (£5.80) and weekly (£19.95) fare values amongst all operator groups. The Municipal operator group has the lowest median single (£1.70) and day (£3.50) ticket values, whilst Stagecoach has the lowest median weekly ticket values (12.50);

- National Express offers the smallest range of single fares covering its operations in the West Midlands and Scotland. Independent operators have the highest range of single fares nationally and of the Yorkshire/Humber region;

- Customers purchasing Arriva and First day tickets generally tend to start making savings against the cost of single trip fares on their second journey of the day; for Stagecoach customers, savings accrue on the seventh journey for weekly ticket purchases;

- Go-Ahead customers pay a premium for day tickets as opposed to single journey tickets in both urban and non-urban markets. In fact, most operators do not offer any form of discount for day tickets purchased on non-urban services. Most customers using both urban and non-urban services will see discounts on purchasing weekly tickets, except for non-urban customers using Go-Ahead and Transdev services.

8.1 Introduction

8.1.1 The analysis above shows how fare levels vary widely by type of operation, region, type of ownership and operating company. Some external factors influencing bus demand and price include:

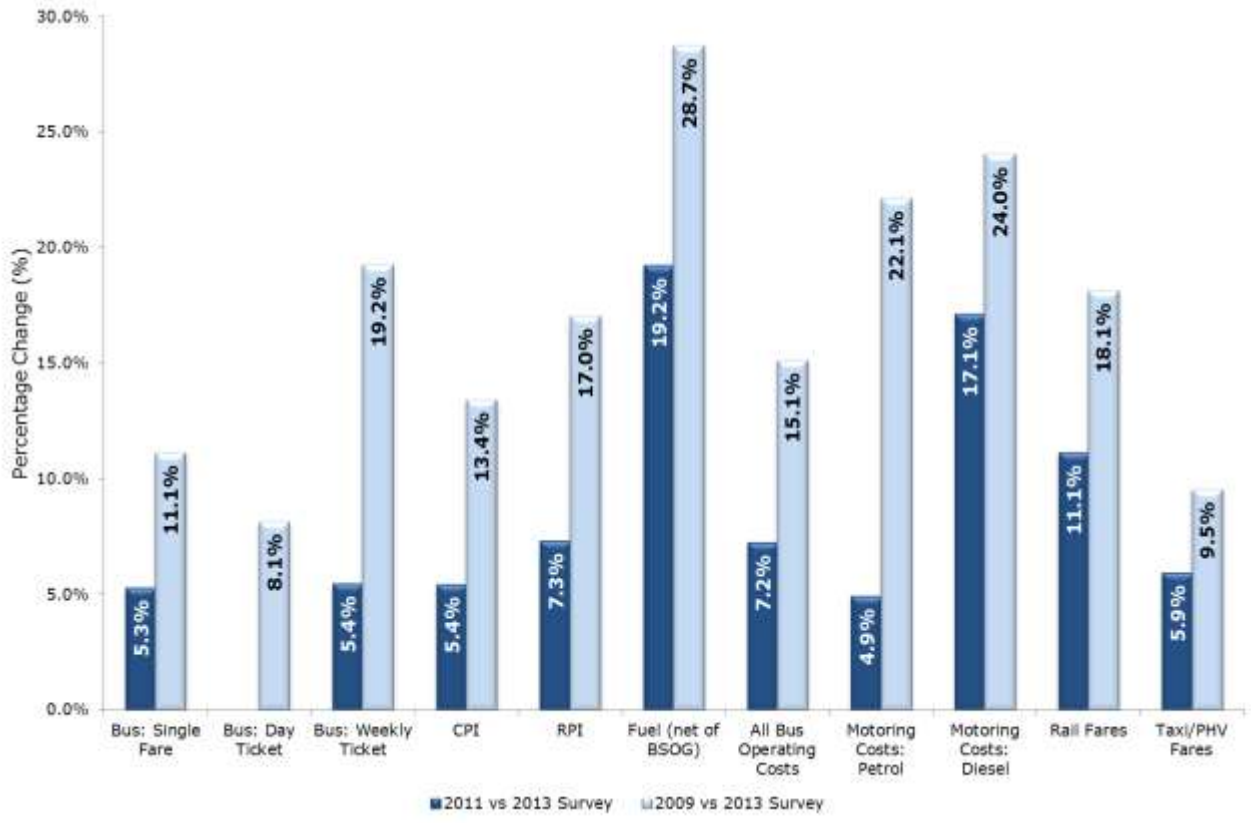
- Costs of operation, in particular variations in labour costs and fuel price;
- Demographic characteristics – including levels of household car ownership; bus ridership, population density; and levels of gross disposable household income (GDHI).

8.1.2 This section focuses on these external factors and provides appropriate contrast with the previous surveys in 2009 and 2011.

8.2 Economic Analysis

8.2.1 Figure JJ illustrates the national percentage changes in cost variables, comparing the most recent survey with those in 2011 and 2009 respectively.

Figure JJ: Change in Cost Variables, 2009-2013



8.2.2 Figures on motoring costs are taken from estimates by the AA.[2] Figures on bus industry costs are based on the CPT Cost Index.[3] Figures on rail fares come from the Office of Rail Regulation.[4] Figures on Taxi fares come from Private Hire and Taxi Monthly's taxi fare league table.[5] Figures on Bus use are from the Department for Transport.[6] Figures on population and household income are from the Office of National Statistics.[7]

8.2.3 The most significant change is the relative cost of fuel (net of BSOG) which has increased by almost 30% in the four years between the 2009 and 2013 surveys. The percentage change in the cost of the median single bus fare is comparable with the change to taxi/PHV fares across all three surveys.

8.2.4 The cost of a median single bus fare may have risen by over 5% in two years and 11% in four years, but this is lower than the percentage increase in principal national economic performance indicators (CPI – consumer price index, RPI – retail price index). The increase is also less than national rail fares and motoring costs (particularly diesel cars) over the same period.

8.2.5 We certainly cannot expect any strong simple relationships between these quantities. Also, most figures used are available on a per region basis, so we do not have many data points for assessing correlation. Therefore we make only qualitative judgements of these relationships based on visual inspection of graphs.

8.3 Factors Influencing Bus Demand

8.3.1 There has been a decrease in national bus ridership between the 2009, 2011 and 2013 surveys and on a regional basis only South East England saw bus ridership increase. However, this is set against rises in ridership reported by some of the major groups.

8.3.2 Figure KK suggests there is a correlation between bus use and the median three-mile single fare by region. The exception here is the North West, which is a high fare and high bus use area. However, discounts for day and weekly tickets appear to be higher in the North West and balance out somewhat.

8.3.3 The graph of bus use density and average fare by region in Figure LL illustrates bus patronage per hectare, which reflects to some extent the nature of the areas served in each region and the bus industry's relative market success by region in attracting passengers. There is a weak correlation

[2] http://www.theaa.com/motoring_advice/running_costs/index.html
[3] http://www.cpt-uk.org/index.php?fuseaction=publications.public_briefing_list
[4] http://dataportal.orr.gov.uk/browsereports
[5] http://www.phtm.co.uk/taxi-fares-league-tables
[6] https://www.gov.uk/government/statistical-data-sets/bus01-local-bus-passenger-journeys
[7] http://www.ons.gov.uk/ons/datasets-and-tables/index.html

between more bus use and lower fares, with the North West and Scotland being very strong exceptions. Perhaps the most surprising aspect of the graph is precisely that it does not show a stronger relationship.

Figure KK: Estimated Bus Use and Median Fare by Region, 2013

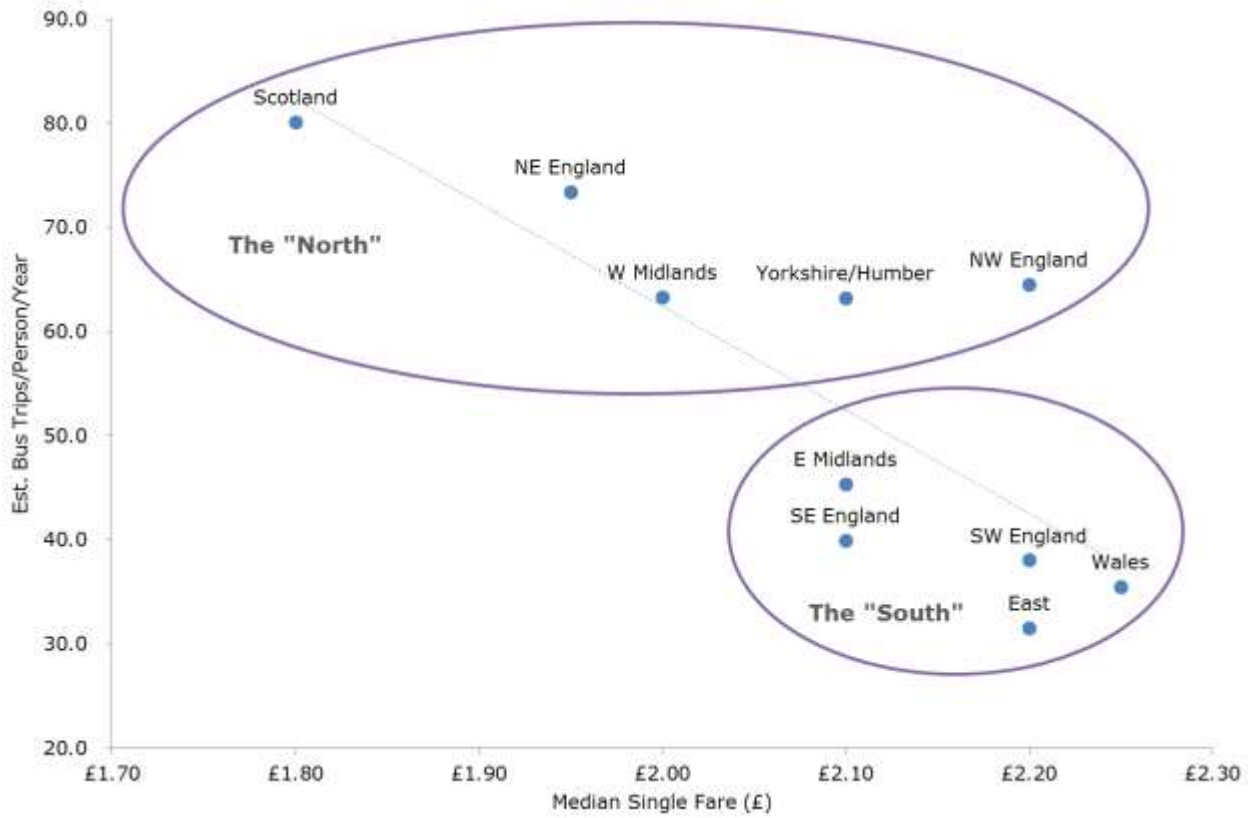
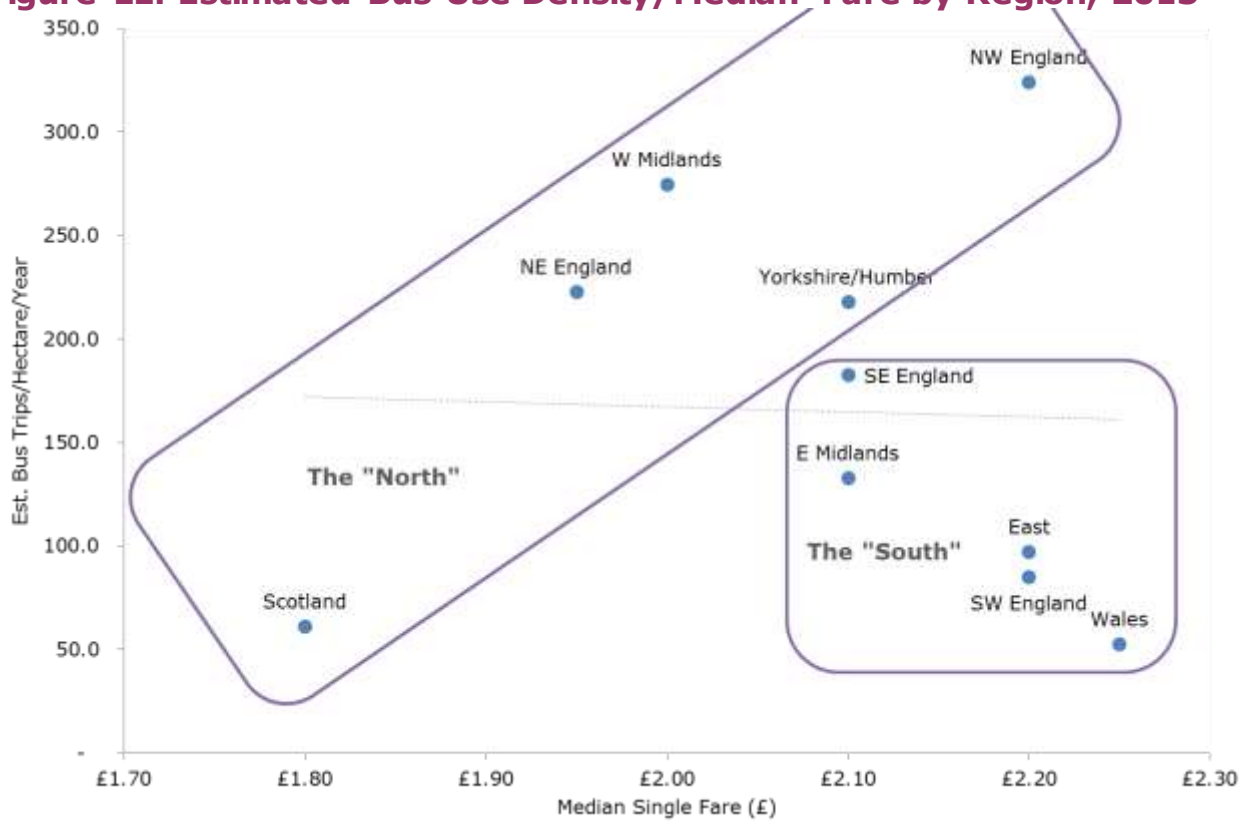


Figure LL: Estimated Bus Use Density/Median Fare by Region, 2013



Population Density

8.3.4 Another way of looking at this is to chart the population density against the average median single fare in each region, illustrated in Figure MM. The graph is similar to Figure LL, but with a more negative correlation - Scotland, the North West and South East being definite exceptions.

8.3.5 Figure OO and Figure PP show the relationship between population density and period ticket prices. There seems to be a correlation between high population density and period tickets that are cheap compared with single tickets. Wales is an exception with cheap period tickets despite low population density. The correlation is much less clear for weekly tickets than day tickets.

8.3.6 These correlations further supports the idea that areas of high population density offer the opportunity for more localised period tickets that are naturally cheaper.

Figure MM: Population Density and Median Fare by Region, mid 2012

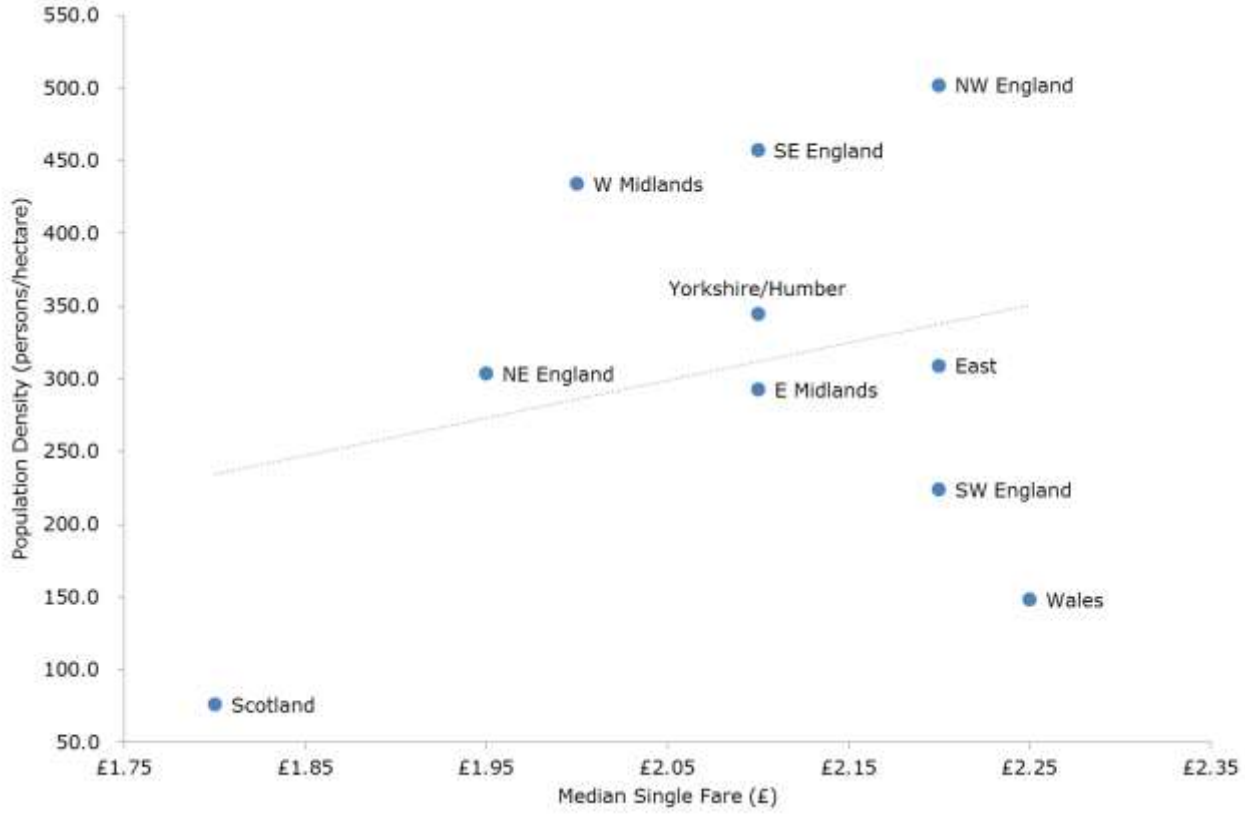


Figure NN: Population Density and Median Day-Single Trip Ratio, 2013

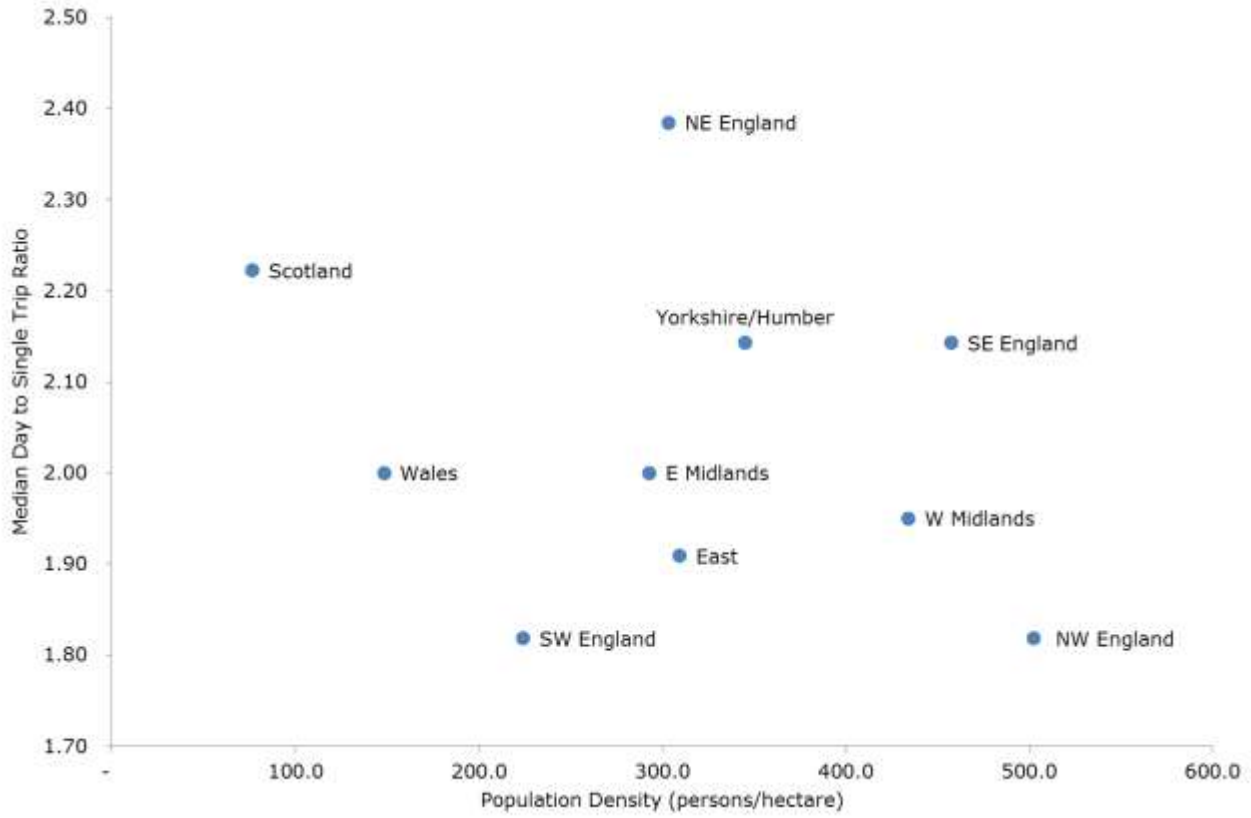
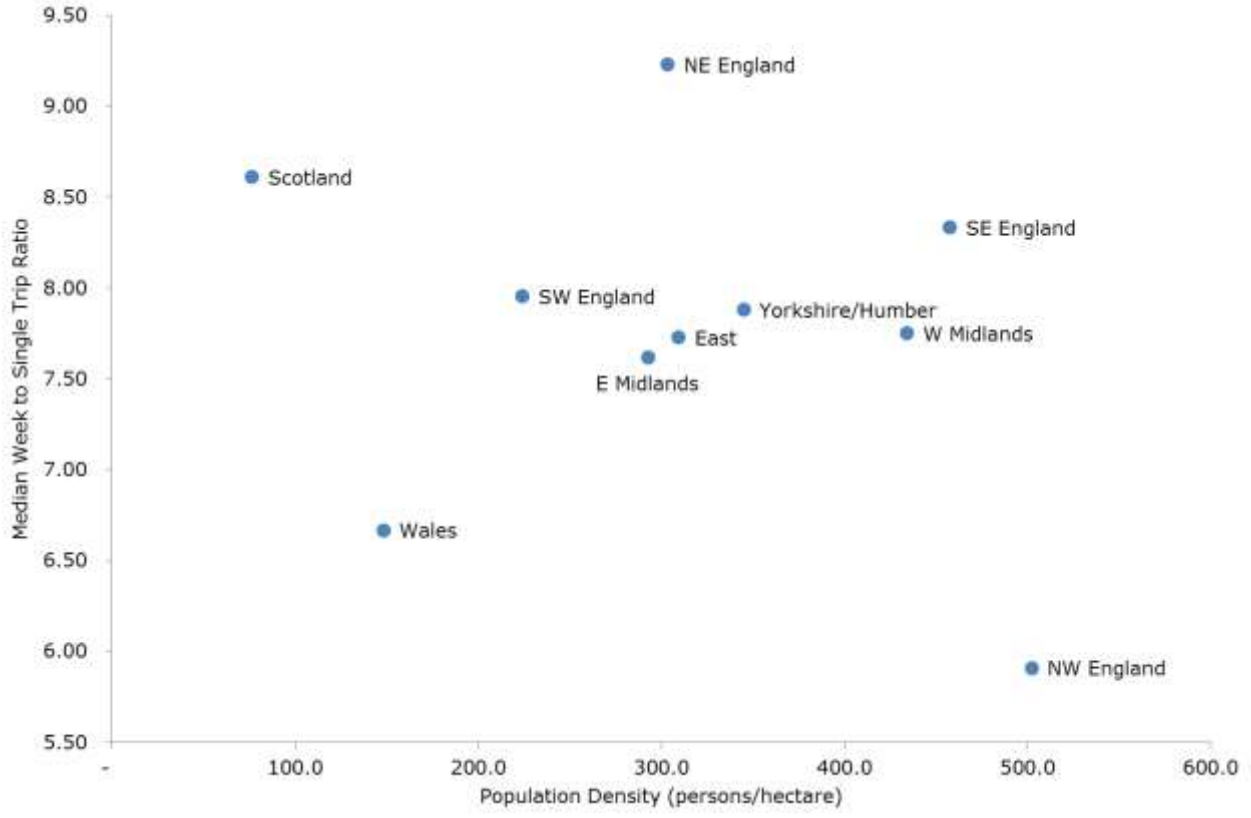


Figure OO: Population Density and Median Week-Single Trip Ratio, 2013



Car Ownership

8.3.7 Figure PP shows there is a clear correlation between bus use (defined as the number of trips per person per year) and levels of car ownership. A north – south divide is evident, with people in the north making more bus trips and possessing fewer cars than their counterparts in the south.

8.3.8 Figure QQ plots car ownership against bus fares. Little if any correlation is evident.

Household Income

8.3.9 Figure RR and Figure SS plot Gross Domestic Household Income (GDHI) against bus use and bus fares by region. High household income seems to be correlated with low bus use and high bus fares in England. Scotland and Wales do not fit the pattern in either graph.

Figure PP: Car Ownership and Estimated Bus Use by Region, 2013

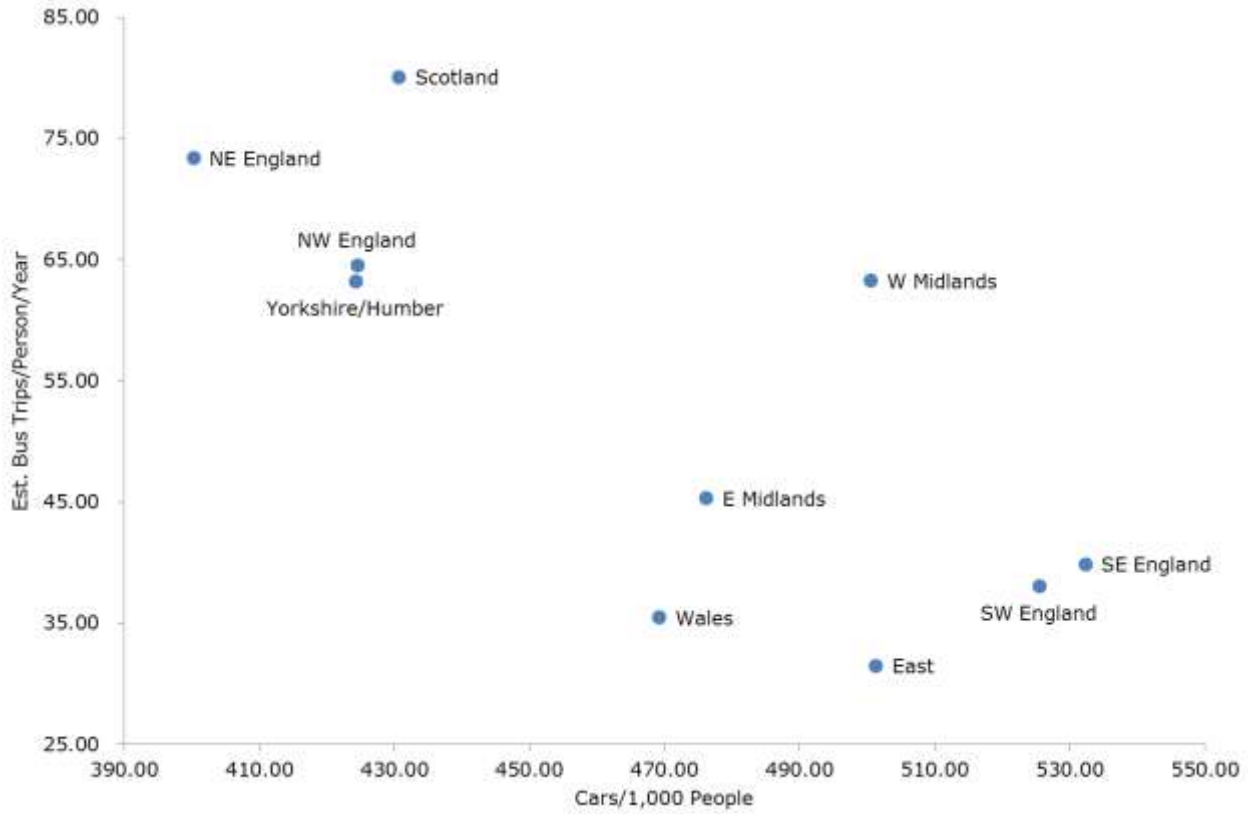


Figure QQ: Car Ownership and Median Single Fare, 2013

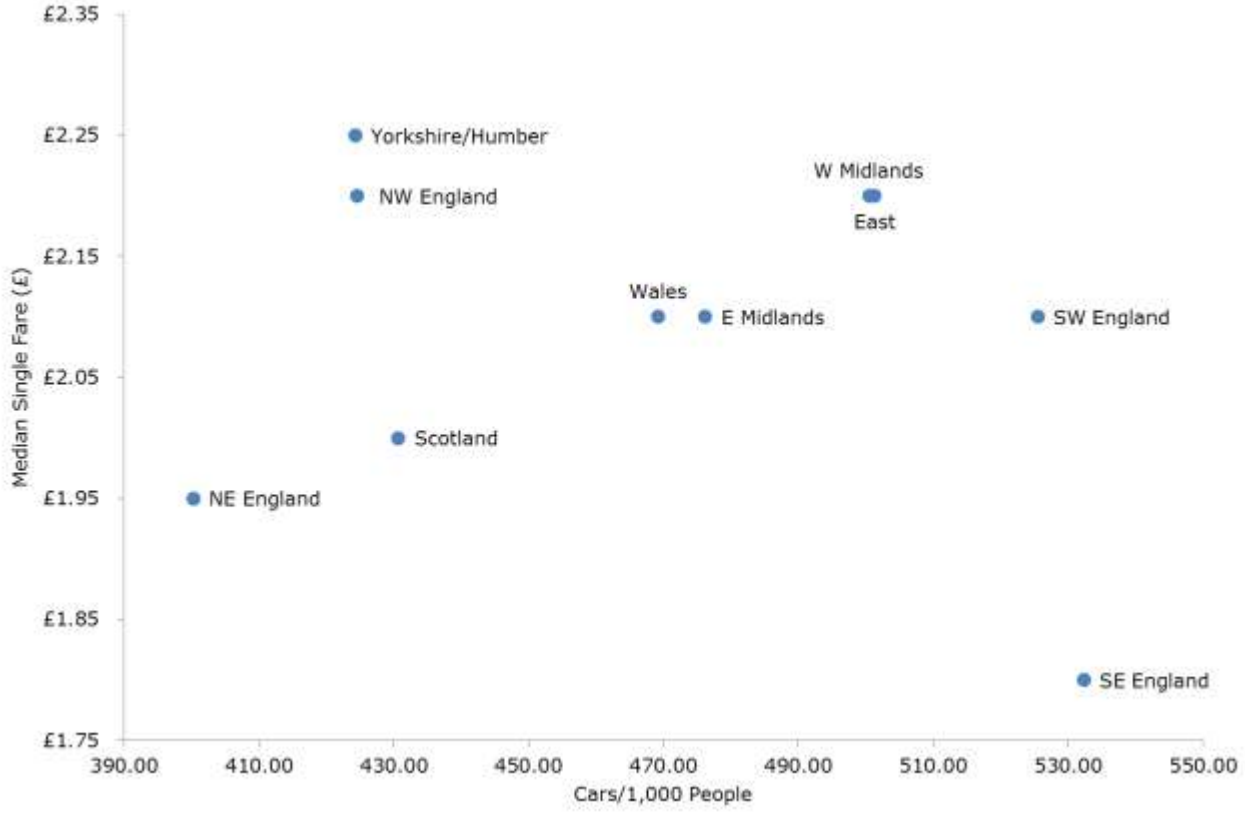


Figure RR: GDHI and Estimated Bus Use by Region

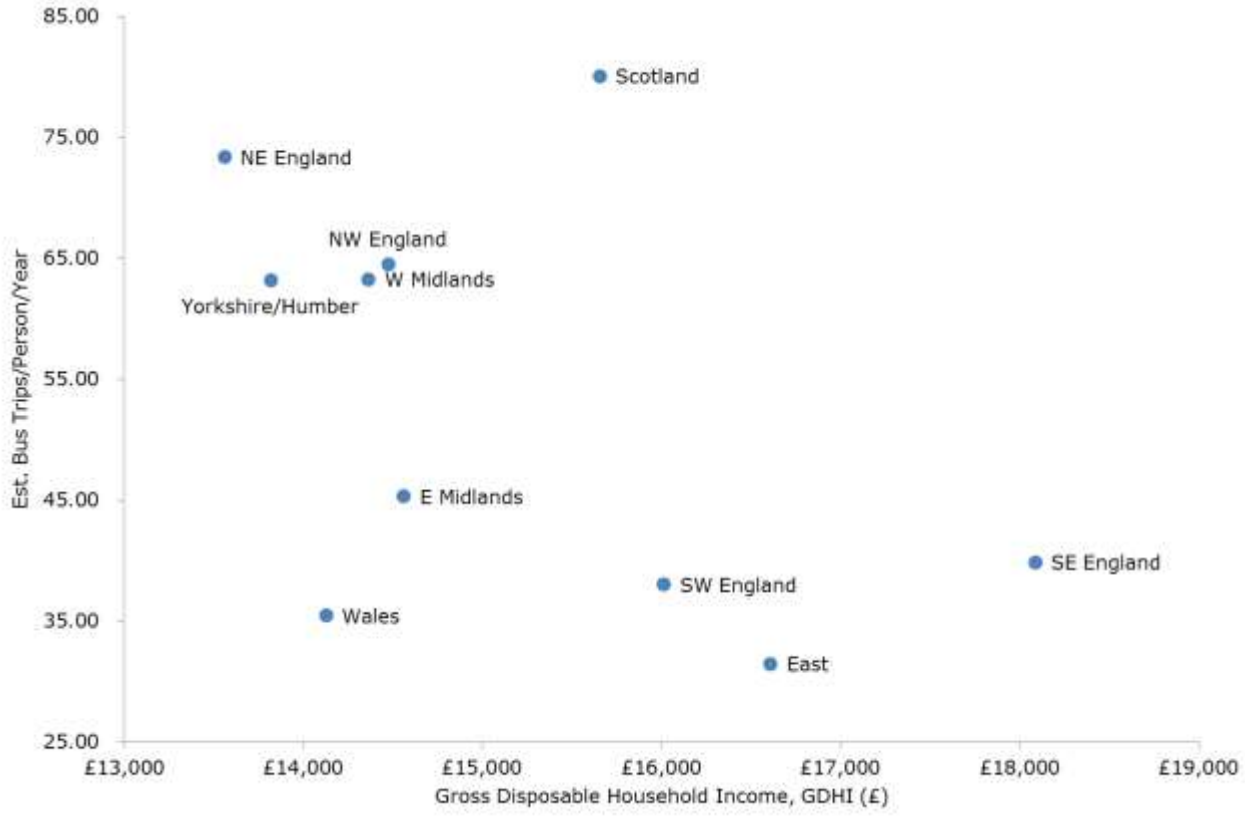
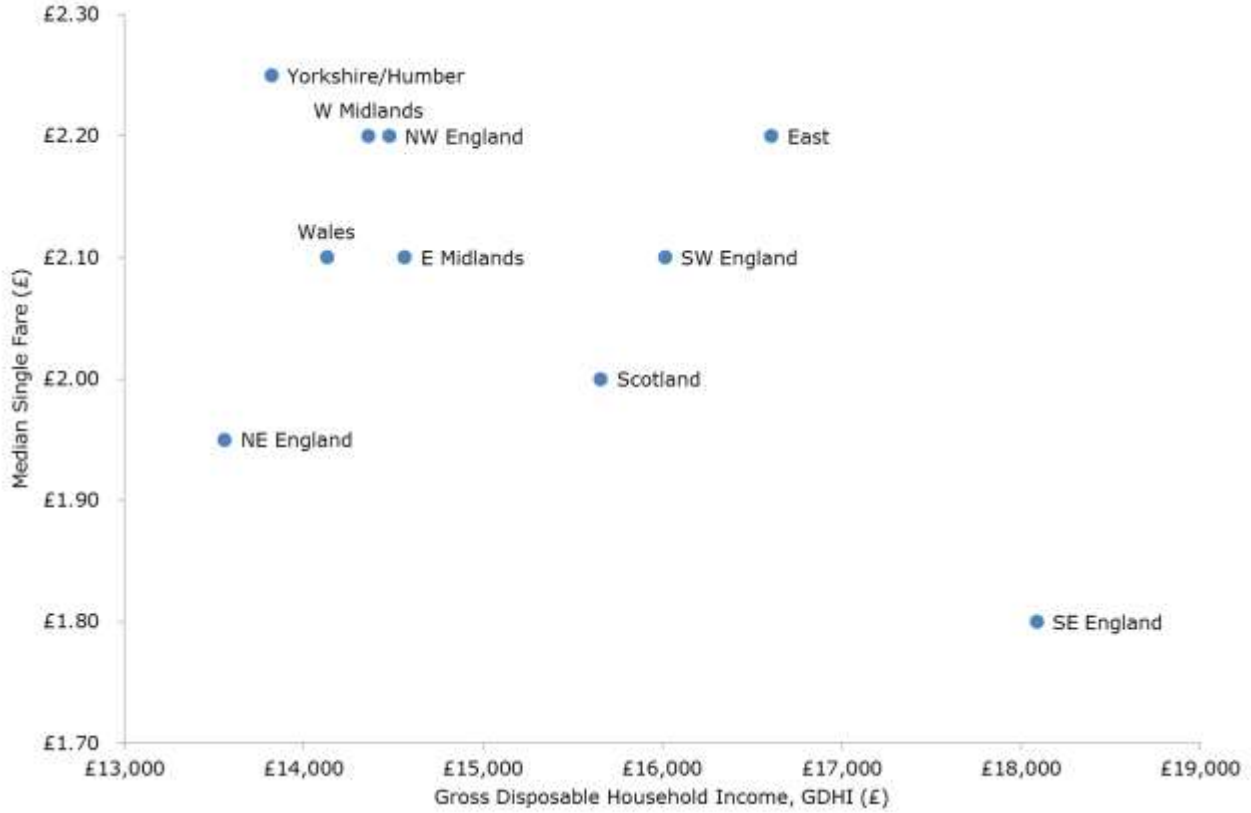


Figure SS: GDHI and Median Single Fare by Region



8.4 Modal Comparisons

8.4.1 We have analysed fares and associated costs of competing modes of transport to the bus services analysed in this study. These include cars, rail journeys (where appropriate) and taxi fares.

Comparison to Motoring Costs

8.4.2 Table 18 (Petrol) and Table 19 (Diesel) compare the total standing and running costs for cars[8] for a range of total annual mileages across the three TAS survey years.

a) **Standing charges** include: road tax (Vehicle Excise Duty), insurance, cost of capital, vehicle depreciation and breakdown cover;

b) **Running costs** include: fuel (petrol or diesel as applicable), tyres, service labour costs, replacement parts, parking and tolls.

8.4.3 We have used figures for the average priced petrol and diesel cars in the middle price range for each survey year. Our analysis shows that there are significant differences in the total costs between petrol and diesel cars since 2011, with the average cost of diesel cars now comparable to that of petrol

[8] Figures supplied by the AA (http://www.theaa.com/motoring_advice/motoring_costs.html)

cars having previously been significantly cheaper. In comparison, the variation in the average three-mile bus fare between 2011 and 2013 falls between the change in petrol and diesel motoring costs; since 2009, however, the change in cost is similar for both bus and car costs.

Table 18: Petrol Cars: Total Standing Charge and Running Costs, 2009-2013

Mileage per Annum	2009 p/mile	2011 p/mile	2013 p/mile	2011–2013 %-change	2009–2013 %-change
5,000	95.8	107.29	**112.6**	**+4.9%**	+17.5%
10,000	58.55	67.21	**70.5**	**+4.9%**	+20.4%
15,000	46.52	54.18	**56.81**	**+4.9%**	+22.1%
20,000	40.81	47.91	**50.23**	**+4.8%**	+23.1%
25,000	36.9	43.75	**45.86**	**+4.8%**	+24.3%
30,000	34.2	40.9	**42.87**	**+4.8%**	+25.4%

Table 19: Diesel Cars: Total Standing Charge and Running Costs, 2009-2013

Mileage per Annum	2009 p/mile	2011 p/mile	2013 p/mile	2011–2013 %-change	2009–2013 %-change
5,000	98.11	99.15	**116.1**	**+17.1%**	+18.3%
10,000	58.5	60.81	**71.21**	**+17.1%**	+21.7%
15,000	45.72	48.35	**56.62**	**+17.1%**	+23.8%
20,000	39.64	42.36	**49.61**	**+17.1%**	+25.2%
25,000	35.49	38.38	**44.95**	**+17.1%**	+26.7%
30,000	32.62	35.65	**41.76**	**+17.1%**	+28.0%

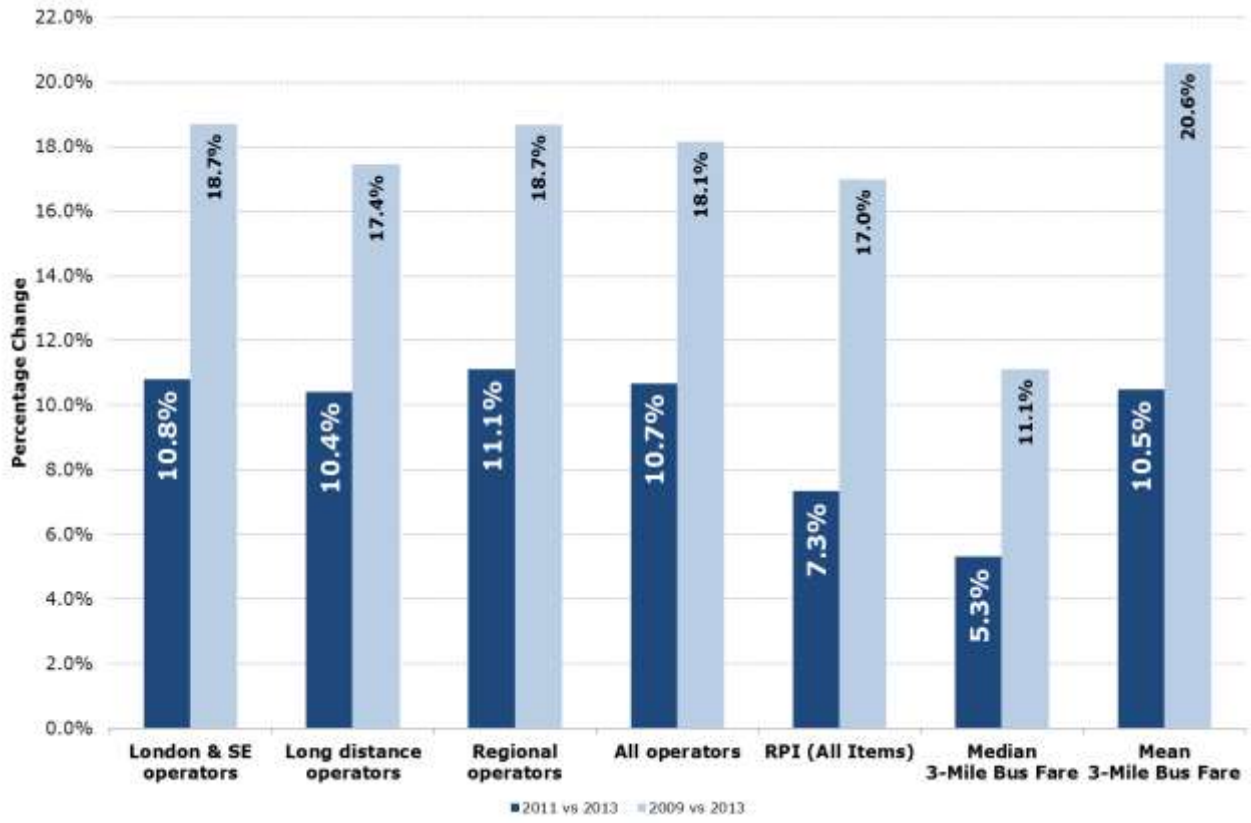
Comparison to Rail Fares

8.4.4 Available data on rail fares is somewhat disaggregated due to the fact that new ticket types were introduced between the 2009 and 2011 bus fare surveys. Rail fare increases in 2009 and 2011 are based on the RPI +1% formula for regulated tickets (e.g. season tickets) with some exceptions. This formula was due to change to RPI +3% from 2012, but the government has now committed extra funding to hold these to RPI +1% for another successive year.

8.4.5 Open access operators are not bound by fares regulation and unregulated fares (e.g. advance purchase singles) can rise by as much as the individual train operating company decides. Regulated fares account for roughly half of ticket revenue. Some train operating companies have also implemented additional effective fare increases by altering definitions of peak periods.

8.4.6 Figure TT shows the percentage changes in rail fares for different types of operator between the 2009, 2011 and 2013 bus fare surveys. Whilst the 'mean' single bus fare has generally increased above the cost of both RPI and rail fares, the median bus fare has generally increased below RPI and rail fares. Since 2011, it can be argued that bus and rail fares have increased roughly at the same rate.

Figure TT: Analysis of Change in Bus vs. Rail Fares, 2009-2013



8.5 Comparison to Taxi Fares

8.5.1 Figure UU compares the rise in bus fares with the rise in 2-mile single taxi fares between the surveys.

8.5.2 Taxi fares have generally risen below RPI since 2009, with increases on average lower than both of those for median, and mean, average three-mile single fares. However, when comparing individual fares, taxi single fares are, on average, a factor of two greater than those for comparable bus fares.

8.5.3 Figure VV show the regional changes in both fare values. Scottish bus fares have not risen as much as taxi fares since 2011 but otherwise mean bus fares have been consistently above taxi fare rises, in some cases rising twice as much.

Figure UU: Analysis of Change in Bus vs. Taxi Fares, 2009-2013

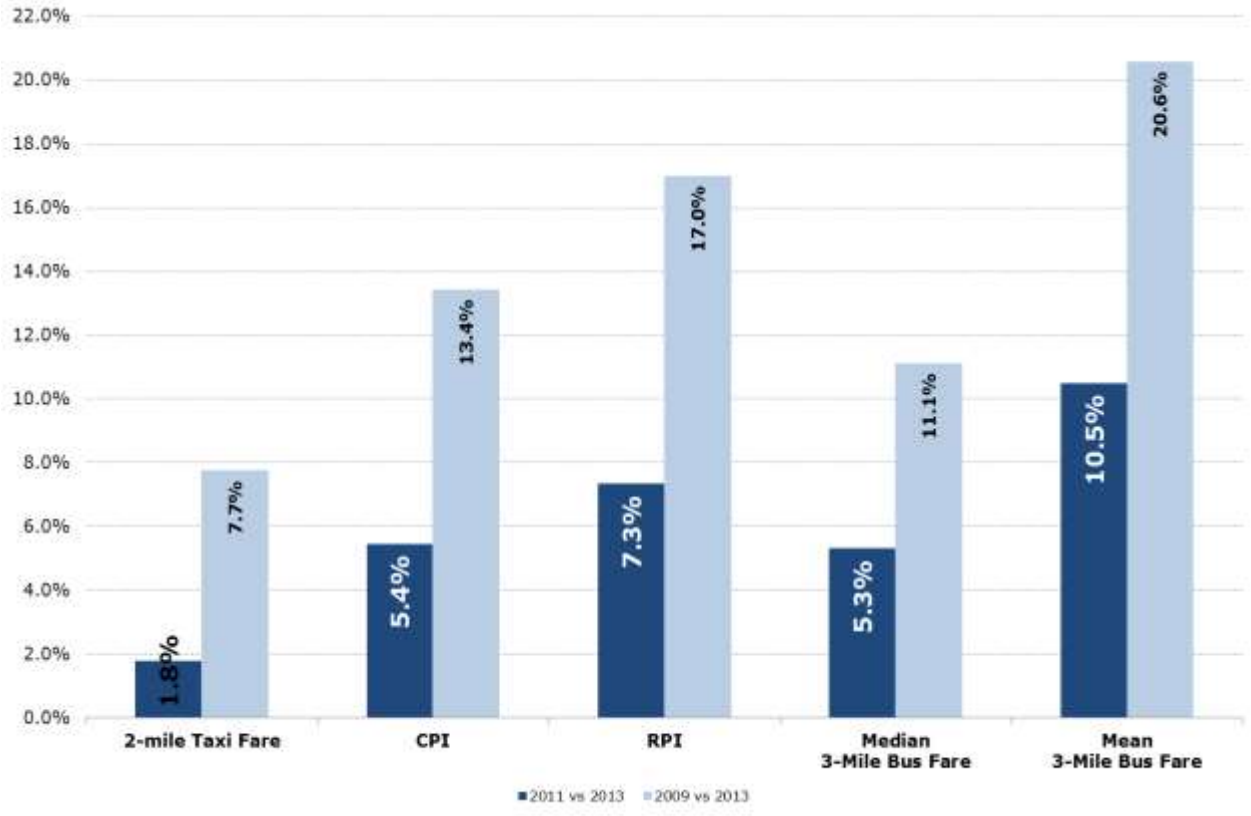
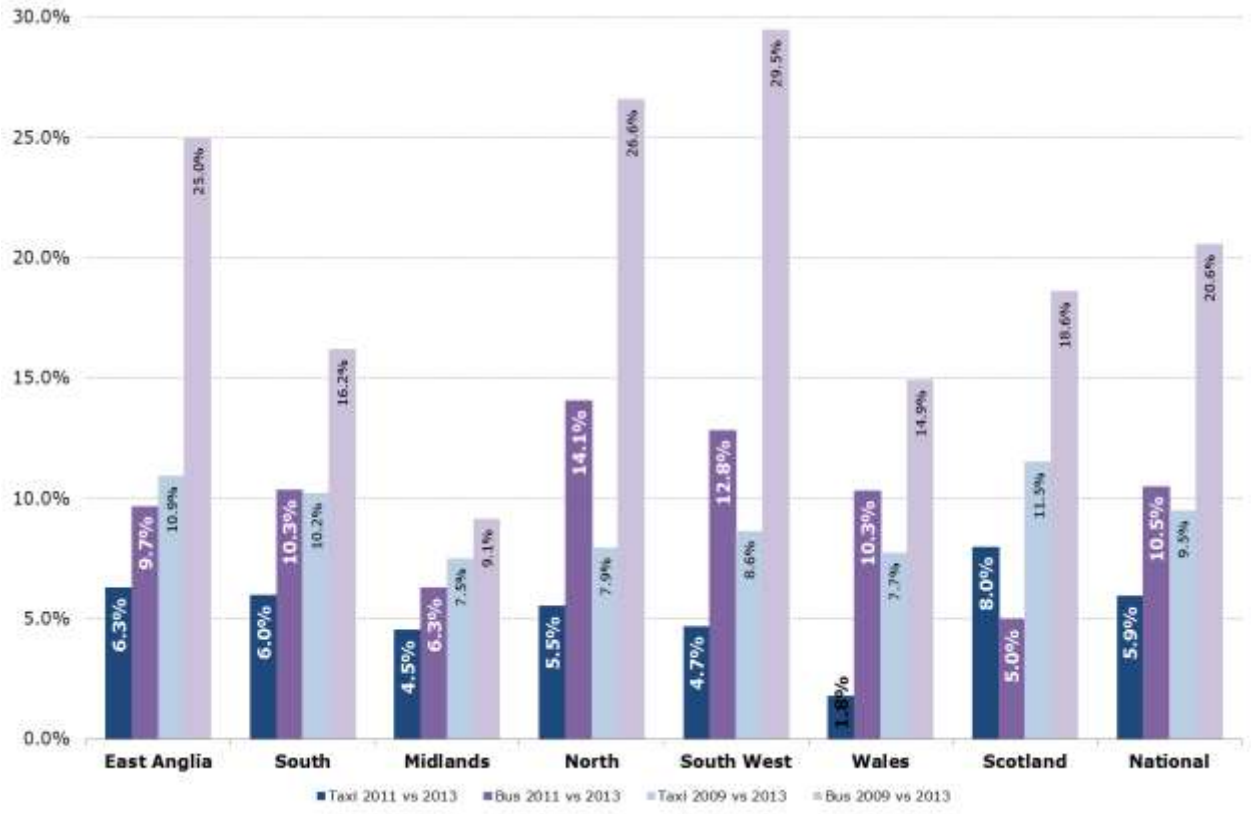


Figure VV: Taxi vs. Bus Fare Comparison, 2009-2013



8.6 In Summary

8.6.1 We have completed our analysis of the economic and demographic factors that have contributed towards, or directly influenced, the cost of GB bus fares. In summary:

- Whilst the cost of a median single bus fare may have risen by over 5% (two years) and 11% (four years), this increase is less than two national economic indicators (RPI of 7.3% and CPI of 5.4%). The increase is also less than comparable figures for national rail fares and motoring costs (particularly diesel cars) during the same period;

- There is a national correlation between the lowest fares, population density and greatest bus use, specifically those PTE areas with Scotland and North West England being exceptions. In addition, a north-south divide between car ownership and estimated bus use emerges, with those in south GB having greater car ownership and using the bus less than their northern counterparts;

- In comparing the cost of bus fares with cost trends from other forms of passenger transportation, we note that whilst diesel car and national rail fares have seen increases above bus use, petrol car and taxi/PHV costs have seen increases below that of bus use. This is a potentially significant area for concern for the bus industry in its attempts to encourage modal shift, and reduce the environmental impact of, the GB road passenger transport sector.

Conclusions 9

9.1 Commentary

9.1.1 As observed in previous surveys, there is a large variation in sample three mile bus fares, between £0.80 and £5.00. Given that the range has increased from the 2011 Survey (£0.70 to £3.85 respectively), there are few fares at the extremes of the sample size; hence, the first time use of median average to discount the extremities to focus on the 'typical' sample fares.

9.1.2 It remains our assertion that there has never been a 'standard bus fare' across GB for a three mile journey, and this continues to be the case. Of particular interest to us, however, is the relatively small percentage increase in the median single fare between the 2011 and 2013 surveys (£0.10, or 5% real-terms). Thus, rounding-up or down produces a fare of about £2.00 for the average single journey - convenient if anyone was thinking of introducing a flat-fare structure and needed some guidance as to charging.

9.1.3 The trends remain the same in terms of the urban/non-urban fares, that is, a tendency for higher fares, on average, in less urban areas. Municipal operators tend to charge lower-than-average for single fares, but provide less discount for period-based tickets; and of the major bus operators, Stagecoach and National Express generally have lower fares and offer the greatest discounts, whilst First has generally higher fares. We note, however, that despite huge pressures on supported local bus services throughout GB, in all regions, operators such as First are investing in lower fares strategies, and it remains to be seen what, if any, impact this has on industry performance before the publication of our 2015 return.

9.1.4 Whilst TAS is familiar with the story of operating cost pressures on the industry, the direct impact of cuts to supported revenue (BSOG) and squeeze on concessionary fares is less well known, and may well form the basis for a separate study. Of note in our conclusions of the 2011 survey was our prediction of an overall fares increase of 11%, resulting from reduced BSOG and operated mileage; on the basis of a relatively small sample of single fares (even at close to 1,000), it would be difficult to link this prediction to our findings here of a median increase of 5% and mean/modal average fares increase in excess of 10% between this and the previous survey.

9.1.5 In Section 8, our analysis once again shows that socio-economic and demographic factors have a substantial influence over many fares levels. Our analysis shows the potential "north-south" divide applies to bus industry fares; the large, densely populated, urban conurbations of the north benefitting from higher bus demand and generally lower fares than operators in south GB – the phenomenon captured by the standard economic principle of high volume=low pricing.

9.1.6 The discount and multiplier value attached to "Day" tickets appears to be narrowing. The 2013 survey shows that, whilst weekly tickets have maintained their discount appeal to regular travellers (specifically, the commuter-led market), the day ticket appears to be developing into the normal return fare equivalent. We are aware, for example, that many operators have replaced return fares with day tickets and, given the evidence gathered here, we would anticipate that the 'return revolution' will continue to be a feature of the 2015 survey.

9.2 Conclusions

9.2.1 Our conclusions from the 2013 survey data suggest that, whilst the average cost of bus travel has increased over the past two years:

- The increases are, on average, less than those experienced in the wider national economy and in comparable modes (diesel car and rail);
- The 'discount' potential of weekly tickets is self-evident, with most customers being able to make savings against the cost of single-trip journeys on their fourth day (or eighth trip) of an average five-day week. Day tickets are becoming a de facto proxy to two single fare journeys and may, in time, replace the typical return fare offered by operators;
- There is a suggestive "north-south" split in the value of fares for a range of demographic analyses, with lower average fares in areas characterised by urban networks, high population density and low levels of car ownership.

9.2.2 Given the ongoing reduction in bus service support (concessionary fares reimbursement, BSOG and supported services themselves), it is still too early to draw a correlation between these and increased fares and ticket costs in the bus industry. However, given that the increases are less than those experienced in other transport (and economic) sectors to date, we anticipate that the effects of reduced support will be experienced between now and the next National Fares Survey.

Appendix A: Operator Sample Data

National Fares Survey 2013: Summary Data by Operator Group and Company

Company	Sample	Median Values			Day Ticket Analysis			Weekly Ticket Analysis			
		Single	Day	Week	SEV	DISC	MULT	SEV	DISC	MULT	Day MULT
Arriva											
Cymru	8	£2.40	£6.50	£19.00	£3.25	-35.4%	2.7	£1.90	20.8%	7.9	2.9
Derby	3	£2.30	£4.20	£18.00	£2.10	8.7%	1.8	£1.80	21.7%	7.8	4.3
Durham County	7	£1.80	£7.00	£25.00	£3.50	-94.4%	3.9	£2.50	-38.9%	13.9	3.6
Merseyside	26	£2.10	£4.50	£17.00	£2.25	-7.1%	2.1	£1.70	19.0%	8.1	3.8
Midlands	28	£1.80	£6.00	£25.00	£3.00	-66.7%	3.3	£2.50	-38.9%	13.9	4.2
North West	13	£2.40	£4.20	£13.50	£2.10	12.5%	1.8	£1.35	43.8%	5.6	3.2
Northumbria	7	£2.10	£4.10	£16.30	£2.05	2.4%	2.0	£1.63	22.4%	7.8	4.0
Shires & Essex	22	£2.00	£4.00	£14.00	£2.00	0.0%	2.0	£1.40	30.0%	7.0	3.5
Southern Counties	21	£2.40	£4.40	£19.00	£2.20	8.3%	1.8	£1.90	20.8%	7.9	4.3
Teesside / Tees & District	6	£1.95	£4.30	£18.50	£2.15	-10.3%	2.2	£1.85	5.1%	9.5	4.3
Yorkshire	15	£2.30	£4.50	£17.50	£2.25	2.2%	2.0	£1.75	23.9%	7.6	3.9
Arriva Summary	**156**	**£2.20**	**£4.25**	**£17.50**	**£2.13**	**3.4%**	**1.9**	**£1.75**	**20.5%**	**8.0**	**4.1**
FirstGroup											
Aberdeen	7	£2.50	£4.70	£18.00	£2.35	6.0%	1.9	£1.80	28.0%	7.2	3.8
Beeline	4	£3.30	£4.80	£19.00	£2.40	27.3%	1.5	£1.90	42.4%	5.8	4.0
Bristol	10	£2.30	£4.00	£18.50	£2.00	13.0%	1.7	£1.85	19.6%	8.0	4.6
Cymru	8	£2.90	£5.00	£21.00	£2.50	13.8%	1.7	£2.10	27.6%	7.2	4.2
Devon/Cornwall	7	£2.35	£3.55	£15.00	£1.78	24.5%	1.5	£1.50	36.2%	6.4	4.2
Eastern Counties	11	£2.10	£5.00	£18.50	£2.50	-19.0%	2.4	£1.85	11.9%	8.8	3.7
Essex	17	£2.80	£4.50	£18.00	£2.25	19.6%	1.6	£1.80	35.7%	6.4	4.0

Company	Sample	Median Values			Day Ticket Analysis			Weekly Ticket Analysis			
		Single	Day	Week	SEV	DISC	MULT	SEV	DISC	MULT	Day MULT
Glasgow	43	£1.90	£4.00	£15.50	£2.00	-5.3%	2.1	£1.55	18.4%	8.2	3.9
Hampshire & Dorset	12	£2.20	£4.20	£18.00	£2.10	4.5%	1.9	£1.80	18.2%	8.2	4.3
Leicester	3	£2.20	£4.20	£16.00	£2.10	4.5%	1.9	£1.60	27.3%	7.3	3.8
Manchester	30	£3.10	£4.00	£13.00	£2.00	35.5%	1.3	£1.30	58.1%	4.2	3.3
Northampton	2	£2.20	£4.00	£12.00	£2.00	9.1%	1.8	£1.20	45.5%	5.5	3.0
Potteries	7	£2.00	£5.00	£19.00	£2.50	-25.0%	2.5	£1.90	5.0%	9.5	3.8
Scotland East	13	£1.60	£5.60	£22.30	£2.80	-75.0%	3.5	£2.23	-39.4%	13.9	4.0
Somerset/Avon	13	£2.80	£4.40	£18.50	£2.20	21.4%	1.6	£1.85	33.9%	6.6	4.2
South Yorkshire	17	£1.80	£3.60	£11.50	£1.80	0.0%	2.0	£1.15	36.1%	6.4	3.2
West Yorkshire	37	£2.10	£4.60	£19.50	£2.30	-9.5%	2.2	£1.95	7.1%	9.3	4.2
Wyvern	5	£2.00	£3.70	£12.00	£1.85	7.5%	1.9	£1.20	40.0%	6.0	3.2
York	5	£2.20	£3.70	£16.00	£1.85	15.9%	1.7	£1.60	27.3%	7.3	4.3
FirstGroup Summary	**251**	**£2.20**	**£4.00**	**£17.00**	**£2.00**	**9.1%**	**1.8**	**£1.70**	**22.7%**	**7.7**	**4.3**
Go-Ahead Group											
Brighton & Hove	8	£2.30	£4.60	£17.50	£2.30	0.0%	2.0	£1.75	23.9%	7.6	3.8
Go North East	25	£1.95	£4.65	£18.00	£2.33	-19.2%	2.4	£1.80	7.7%	9.2	3.9
GSC/Bluestar	4	£2.10	£3.50	£13.00	£1.75	16.7%	1.7	£1.30	38.1%	6.2	3.7
GSC/Salisbury Reds	4	£2.40	£6.00	£19.00	£3.00	-25.0%	2.5	£1.90	20.8%	7.9	3.2
GSC/Southern Vectis	4	£3.50	£10.00	£24.00	£5.00	-42.9%	2.9	£2.40	31.4%	6.9	2.4
GSC/Wilts & Dorset	9	£2.20	£8.00	£24.00	£4.00	-81.8%	3.6	£2.40	-9.1%	10.9	3.0
Metrobus	15	£2.10	£4.30	£18.50	£2.15	-2.4%	2.0	£1.85	11.9%	8.8	4.3
Oxford Bus Co	5	£2.00	£4.00	£15.00	£2.00	0.0%	2.0	£1.50	25.0%	7.5	3.8
Plymouth Citybus	6	£1.85	£3.60	£15.50	£1.80	2.7%	1.9	£1.55	16.2%	8.4	4.3

Company	Sample	Median Values			Day Ticket Analysis			Weekly Ticket Analysis			
		Single	Day	Week	SEV	DISC	MULT	SEV	DISC	MULT	Day MULT
Go-Ahead Summary	**83**	**£2.00**	**£4.65**	**£18.00**	**£2.33**	**-16.3%**	**2.3**	**£1.80**	**10.0%**	**9.0**	**3.9**
Independent Operators											
Abellio Surrey	5	£2.50	£7.00	£20.00	£3.50	-40.0%	2.8	£2.00	20.0%	8.0	2.9
EYMS	9	£2.35	£12.00	£15.05	£6.00	-155.3%	5.1	£1.51	36.0%	6.4	1.3
Kinchbus	3	£2.10	£4.20	£13.00	£2.10	0.0%	2.0	£1.30	38.1%	6.2	3.1
Lloyds Coaches	4	£1.88	£5.60	£15.00	£2.80	-49.3%	3.0	£1.50	20.0%	8.0	2.7
McGills	14	£1.93	£3.30	£14.50	£1.65	14.3%	1.7	£1.45	24.7%	7.5	4.4
Network Colchester (TGM)	2	£1.85	£3.50	£16.00	£1.75	5.4%	1.9	£1.60	13.5%	8.6	4.6
Norfolk Green	2	£1.70	£6.50	£12.25	£3.25	-91.2%	3.8	£1.23	27.9%	7.2	1.9
Pennine Bus	1	£5.00	£6.00	£30.00	£3.00	40.0%	1.2	£3.00	40.0%	6.0	5.0
Preston Bus	4	£1.70	£3.30	£10.50	£1.65	2.9%	1.9	£1.05	38.2%	6.2	3.2
Trent Barton	10	£2.45	£8.00	£30.00	£4.00	-63.3%	3.3	£3.00	-22.4%	12.2	3.8
Western Greyhound	3	£1.80	£8.50	£10.40	£4.25	-136.1%	4.7	£1.04	42.2%	5.8	1.2
Whittle	1	£1.90	£3.00	£12.00	£1.50	21.1%	1.6	£1.20	36.8%	6.3	4.0
Yellow Buses	2	£1.70	£3.90	£16.00	£1.95	-14.7%	2.3	£1.60	5.9%	9.4	4.1
Independent Summary	**64**	**£1.98**	**£4.20**	**£14.50**	**£2.10**	**-6.3%**	**2.1**	**£1.45**	**26.6%**	**7.3**	**3.5**
Muncipal (Local Authority Owned) Operators											
Blackpool	3	£1.70	£4.50	£14.00	£2.25	-32.4%	2.6	£1.40	17.6%	8.2	3.1
Cardiff	8	£1.70	£3.40	£15.00	£1.70	0.0%	2.0	£1.50	11.8%	8.8	4.4
Halton	4	£2.05	£3.80	£16.00	£1.90	7.3%	1.9	£1.60	22.0%	7.8	4.2
Ipswich	4	£1.80	£4.00	£15.00	£2.00	-11.1%	2.2	£1.50	16.7%	8.3	3.8
Lothian	26	£1.50	£3.50	£17.00	£1.75	-16.7%	2.3	£1.70	-13.3%	11.3	4.9
Newport	2	£1.60	£3.00	£15.00	£1.50	6.3%	1.9	£1.50	6.3%	9.4	5.0

Company	Sample	Median Values			Day Ticket Analysis			Weekly Ticket Analysis			
		Single	Day	Week	SEV	DISC	MULT	SEV	DISC	MULT	Day MULT
Nottingham	9	£1.70	£3.40	£15.00	£1.70	0.0%	2.0	£1.50	11.8%	8.8	4.4
Reading	4	£1.80	£4.00	£15.00	£2.00	-11.1%	2.2	£1.50	16.7%	8.3	3.8
Rossendale	4	£2.40	£4.70	£20.00	£2.35	2.1%	2.0	£2.00	16.7%	8.3	4.3
Thamesdown	2	£1.60	£3.60	£14.00	£1.80	-12.5%	2.3	£1.40	12.5%	8.8	3.9
Warrington	4	£2.00	£4.00	£16.50	£2.00	0.0%	2.0	£1.65	17.5%	8.3	4.1
Municipal Summary	**70**	**£1.70**	**£3.50**	**£16.00**	**£1.75**	**-2.9%**	**2.1**	**£1.60**	**5.9%**	**9.4**	**4.6**
National Express Group											
Travel Dundee	5	£2.20	£3.40	£12.00	£1.70	22.7%	1.5	£1.20	45.5%	5.5	3.5
Travel West Midlands	61	£2.00	£3.90	£14.00	£1.95	2.5%	2.0	£1.40	30.0%	7.0	3.6
NatEx Summary	**66**	**£2.00**	**£3.90**	**£14.00**	**£1.95**	**2.5%**	**2.0**	**£1.40**	**30.0%**	**7.0**	**3.6**
Stagecoach Group											
Bluebird	8	£2.00	£6.50	£20.00	£3.25	-62.5%	3.3	£2.00	0.0%	10.0	3.1
Cumbria/North Lancashire	10	£1.75	£4.70	£15.30	£2.35	-34.3%	2.7	£1.53	12.6%	8.7	3.3
East	21	£2.10	£6.00	£23.50	£3.00	-42.9%	2.9	£2.35	-11.9%	11.2	3.9
East Kent	18	£2.00	£3.50	£11.00	£1.75	12.5%	1.8	£1.10	45.0%	5.5	3.1
East Midlands	22	£2.00	£3.95	£10.50	£1.98	1.3%	2.0	£1.05	47.5%	5.3	2.7
East Scotland	19	£1.55	£7.00	£18.50	£3.50	-125.8%	4.5	£1.85	-19.4%	11.9	2.6
Highland	7	£1.60	£4.20	£15.00	£2.10	-31.3%	2.6	£1.50	6.3%	9.4	3.6
Manchester	31	£2.20	£4.00	£12.50	£2.00	9.1%	1.8	£1.25	43.2%	5.7	3.1
Merseyside/South Lancs	19	£2.00	£3.70	£12.50	£1.85	7.5%	1.9	£1.25	37.5%	6.3	3.4
Midlands	11	£1.85	£6.00	£19.20	£3.00	-62.2%	3.2	£1.92	-3.8%	10.4	3.2
North East	20	£2.10	£3.80	£12.00	£1.90	9.5%	1.8	£1.20	42.9%	5.7	3.2
Oxfordshire	7	£2.00	£7.50	£19.00	£3.75	-87.5%	3.8	£1.90	5.0%	9.5	2.5

Company	Sample	Median Values			Day Ticket Analysis			Weekly Ticket Analysis			
		Single	Day	Week	SEV	DISC	MULT	SEV	DISC	MULT	Day MULT
South	21	£2.30	£4.50	£13.50	£2.25	2.2%	2.0	£1.35	41.3%	5.9	3.0
South West	14	£2.30	£5.10	£17.50	£2.55	-10.9%	2.2	£1.75	23.9%	7.6	3.4
Wales	12	£2.40	£4.30	£11.05	£2.15	10.4%	1.8	£1.11	54.0%	4.6	2.6
West	11	£2.00	£3.50	£12.50	£1.75	12.5%	1.8	£1.25	37.5%	6.3	3.6
West Scotland	15	£1.75	£3.40	£10.50	£1.70	2.9%	1.9	£1.05	40.0%	6.0	3.1
Yorkshire	14	£1.50	£3.65	£11.50	£1.83	-21.7%	2.4	£1.15	23.3%	7.7	3.2
Stagecoach Summary	**280**	**£2.00**	**£4.00**	**£12.50**	**£2.00**	**0.0%**	**2.0**	**£1.25**	**37.5%**	**6.3**	**3.1**
Transdev											
Burnley & Pendle	5	£2.40	£5.60	£19.80	£2.80	-16.7%	2.3	£1.98	17.5%	8.3	3.5
Harrogate & District	5	£2.70	£8.00	£32.00	£4.00	-48.1%	3.0	£3.20	-18.5%	11.9	4.0
Keighley & District	4	£2.30	£4.80	£15.60	£2.40	-4.3%	2.1	£1.56	32.2%	6.8	3.3
Lancashire United	4	£2.55	£4.20	£13.50	£2.10	17.6%	1.6	£1.35	47.1%	5.3	3.2
Yorkshire Coastliner	6	£2.35	£15.00	£37.00	£7.50	-219.1%	6.4	£3.70	-57.4%	15.7	2.5
Transdev Summary	**24**	**£2.50**	**£5.80**	**£19.95**	**£2.90**	**-16.0%**	**2.3**	**£2.00**	**20.2%**	**8.0**	**3.4**
Transport for London (TfL)											
TfL Summary	**3**	**£2.40**	**£4.40**	**£19.60**	**£2.20**	**8.3%**	**1.8**	**£1.96**	**18.3%**	**8.2**	**4.5**