

# Quarterly Bus Statistics: Great Britain Q4 (Oct-Dec) 2013



Department for Transport

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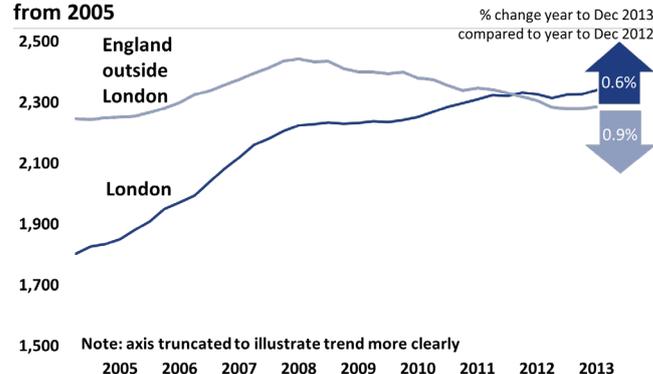
## Main findings

Total bus usage in England stayed roughly constant in the year to December 2013, falling 0.1% compared to the previous year. Passenger journeys in London increased but at a slower rate whilst outside London the rate of decrease also slowed.

An estimated 4.63 billion **bus passenger journeys** were made in the year to December 2013, around 6 million fewer than during the previous year. Bus passenger numbers in England have remained relatively stable overall since a 20-year high of 4.67 billion in 2008/09.

- Bus patronage increased 1.7% in England overall in Q4 2013 compared to the same quarter in 2012. In both London and non-metropolitan areas patronage increased while use in metropolitan areas fell slightly (by 0.4%).
- Although in the year to December 2013 England outside London showed a decline compared to the previous year, the past three quarters have shown quarter on quarter increases in seasonally adjusted passenger journeys.

Bus passenger journeys in England (millions) – rolling year totals from 2005



Rate of annual increase in bus fares and RPI inflation since 2008



**Bus fares** in England increased 4.1% over the year to December 2013, this was a slight reduction in the rate of increase compared to last quarter, but remained above the rate of inflation (inflation measured by the Retail Prices Index (RPI) was 2.7% in December 2013). Although the rate of annual increase in bus fares and RPI inflation had been converging since June 2012 the gap has begun to widen again over the past two quarters.

## About these statistics

This quarterly release covers local bus passenger journeys and fares. It provides the most up to date statistics for monitoring key trends in the local bus sector. More detailed annual bus statistics, including information on mileage, revenue and costs, and the vehicle fleet, are published each autumn.

This release relates largely to England, in line with the coverage of DfT bus policy. However the statistical tables cover the whole of Great Britain, including figures for Wales and Scotland.

Quarterly passenger journey figures are based on data collected from a panel survey of the largest bus operators, and are seasonally adjusted. The bus fares index is compiled from data provided by a representative sample of around 100 operators and Transport for London (TfL).

## Summary figures

The table summarises the latest quarterly and rolling annual figures. Figures for individual quarters should be interpreted with caution, as they can be affected by sustained periods of bad weather or the timing of public holidays.

Figures for England are broken down into London, metropolitan areas (which are the six former metropolitan counties of Greater Manchester, Merseyside, South Yorkshire, Tyne and Wear, West Midlands and West Yorkshire) and non-metropolitan areas (the rest, covering shire counties and unitary authorities).

	Passenger journeys		Bus fares index
	Year to end December 2013	Q4 (Oct-Dec) 2013	December 2013
	Compared to previous year	Compared to Q4 2012	Change on December 2012
Great Britain	5.16 billion; <span style="color:red">⬇️</span> 0.3%	1.30 billion; <span style="color:green">⬆️</span> 1.6%	<span style="color:blue">↔️</span> 4.0%
England	4.63 billion; <span style="color:red">⬇️</span> 0.1%	1.17 billion; <span style="color:green">⬆️</span> 1.7%	<span style="color:blue">↔️</span> 4.1%
London	2.34 billion; <span style="color:green">⬆️</span> 0.6%	0.59 billion; <span style="color:green">⬆️</span> 2.4%	<span style="color:blue">↔️</span> 4.6%
Outside London	2.29 billion; <span style="color:red">⬇️</span> 0.9%	0.58 billion; <span style="color:green">⬆️</span> 1.0%	<span style="color:blue">↔️</span> 3.7%
Metropolitan areas	1.00 billion; <span style="color:red">⬇️</span> 1.8%	0.25 billion; <span style="color:red">⬇️</span> 0.4%	<span style="color:blue">↔️</span> 3.5%
Non-metropolitan areas	1.29 billion; <span style="color:red">⬇️</span> 0.1%	0.33 billion; <span style="color:green">⬆️</span> 2.0%	<span style="color:blue">↔️</span> 3.8%
Scotland	0.42 billion; <span style="color:red">⬇️</span> 1.3 %	0.11 billion; <span style="color:green">⬆️</span> 1.2%	<span style="color:blue">↔️</span> 3.2%
Wales	0.11 billion; <span style="color:red">⬇️</span> 2.0%	0.03 billion; <span style="color:red">⬇️</span> 1.1%	<span style="color:blue">↔️</span> 3.2%

Detailed statistical tables are available online as part of the [bus statistics series](#)

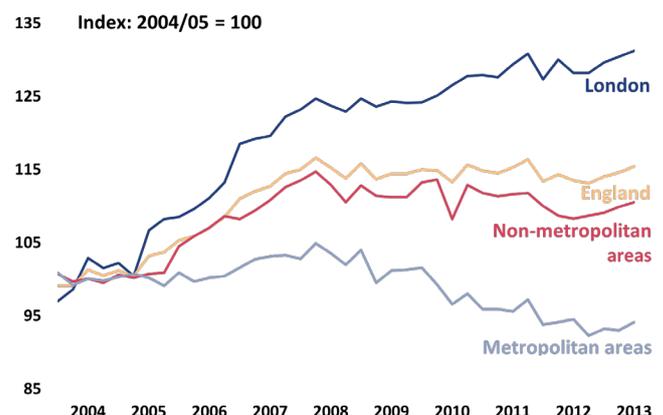
- Passenger numbers in section [BUS01](#): tables BUS0103 (annual) and BUS0106 (quarterly)
- Bus fares index in section [BUS04](#): tables BUS0405 (annual) and BUS0415 (quarterly)

## Bus passenger journeys

Bus usage, measured by the number of bus passenger journeys (with each boarding of a bus counted as one journey), is the key measure of bus demand and is likely to be affected by many factors. While medium and longer-term trends can be explained to some extent, it is not usually possible to attribute causality to short-term movements which may reflect fluctuations in patronage, or result from the method of seasonal adjustment applied to the data.

- Since 2008/09, total passenger journeys in England have remained broadly stable overall, as growth in London has offset a gradual decline in passenger numbers outside London. However this quarter, journeys outside London showed a 1.0% increase compared to the same quarter in 2012, while London continued to increase, resulting in a 1.7% increase in England overall on the same quarter in 2012.
- Compared to the previous quarter patronage increased in all English area types in Q4 2013 resulting in a 0.7% overall England increase.

**Passenger journeys on local bus services: England, quarterly from 2004/05 [table BUS0106]**



Related information includes:

- Table [BUS0103](#) which shows annual bus passenger numbers from the mid-1980s
- DfT [bus statistical tables](#) provide information on the bus sector, including levels of subsidy and expenditure on concessionary travel (section BUS05). Most are updated annually in autumn.
- The [National Travel Survey](#) (NTS) contains information on characteristics of bus users and long term trends in travel which provides context to trends in bus use.

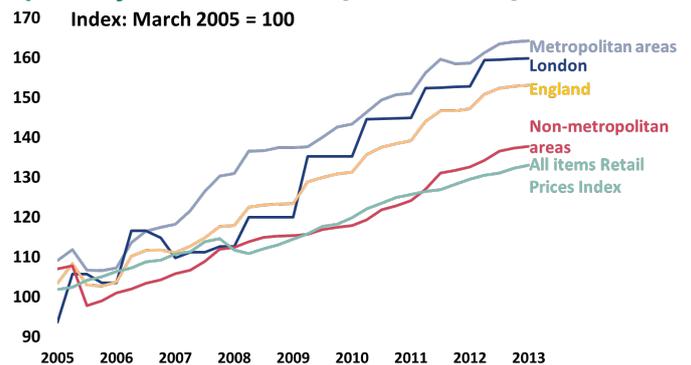
## Bus fares

The local bus fares index measures percentage change in bus operator receipts from passengers as a result of any fare changes. These figures provide an estimate of change in the average cost of bus travel to the passenger, but not the actual fare levels paid (which can vary due to changes in the mix of journeys made and other factors).

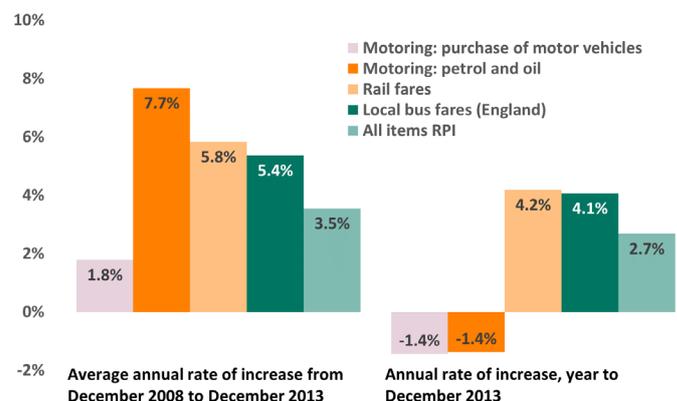
Outside London, fare changes will largely reflect the commercial decisions of bus operators, which in turn may in part reflect changes in public funding. For example, Bus Service Operators Grant, a central government subsidy to bus operators based on fuel consumption, was cut by 20% in England in April 2012. Bus fares in London are set by TfL.

- Average bus fares increased by 39% in England between March 2007 and December 2013<sup>1</sup>. The increase was higher in metropolitan areas (45%) and lower in non-metropolitan areas (35%) and London (37%). During this time the all items Retail Price Index (RPI) has grown by 24%, which means that bus fares have increased in real terms during this period.
- In the past year to December 2013 local bus fares increased by 4.1%, similar to the growth in rail fares over the same period and both considerably higher than motor fuel (petrol and oil) which has decreased by 1.4% in the past year.
- Over the past five years from December 2008 to December 2013 local bus fares have increased by an average annual growth rate of 5.4%, slightly below rail fares. In the same period both rail and bus fares have increased at a higher rate than RPI. However, the cost of motor fuel (petrol and oil) has increased at an even higher rate over the same period.

**Local bus fares index (current prices): England, quarterly from June 2005** [table BUS0415]



**Average annual rate of increase: RPI and transport indices, latest year and last 5 years** [ONS data and DfT bus fares index]



<sup>1</sup> The launch of the English National Concessionary Travel

Scheme (ENCTS) in April 2006 resulted in some passengers who had previously paid fares being able to travel for free. As the Bus fares index reflects changes in the average costs of bus travel across all users of bus services, the ENCTS launch resulted in a one-off downward step-change in the index between March 2006 and June 2006. However, passengers who were fare-payers both before and after the launch of the ENCTS would not have seen a reduction in the cost of bus travel. Therefore changes are reported from March 2007, after this one-off change. The chart shows the trend from 2005.

### Related information includes:

- A longer time series of annual figures is available in table [BUS0405](#)
- [Monthly inflation figures](#) are published by the Office for National Statistics (ONS), with a detailed breakdown by category including bus/coach fares, rail fares and motoring costs.
- An annual summary of the ONS transport indices is available in table [TSGB0123](#)

## Background information

### Data sources, strengths and weaknesses

Estimates of local bus **passenger journeys** are based on a quarterly panel of the 18 largest non-metropolitan operators, Passenger Transport Executives (for metropolitan areas) and Transport for London (TfL). Data from the quarterly panel is scaled to annual figures from the Department's main annual survey of over 500 PSV operators, and figures are then seasonally adjusted.

For Q4 2013, responses were received from all of the 18 panel members, covering over 90 per cent of the journeys made in Great Britain. However, quarterly figures are less precise than the annual statistics which aims to report on all journeys, including those made with smaller operators.

Quarterly figures are subject to revision due to the nature of the seasonal adjustment, and scaling to annual figures. However, these will typically be minor and not affect overall patterns shown.

The quarterly **bus fares index** is based on a sample survey of around 100 bus operators and TfL, who supply data each quarter. The index measures change in the 'gross yield'. This is the change in passenger receipts (excluding concessionary fare reimbursement and subsidies from government) which would result from a fares change, assuming no change in passenger numbers.

In total the operators selected cover around 85 per cent of passenger receipts in Great Britain, and the sample design ensures operators in each type of area are adequately represented. The survey response rate is high, recently over 90 per cent (100 per cent for Q3 and Q4 2013). The index has been compiled in the same way for many years and so should measure trends consistently.

Data on actual fare levels are not collected. The index assumes no change in passenger behaviour and therefore may not reflect changes in the average fare actually paid (for example if passengers switch to a different ticket type, or choose not to travel, as a result of fare changes).

**Further details** can be found in the notes and definitions document available here: [www.gov.uk/government/organisations/department-for-transport/series/bus-statistics](http://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics)

### Users and uses of these statistics

Within DfT these figures are used to inform bus policy decisions, for ministerial briefing and to answer public enquiries. Outside DfT, passenger journeys figures are used as a measure of the overall health/state of the industry, for example by private research organisations, and are often reported in the trade press. Bus fares data are used by the Office for National Statistics in calculating the Retail and Consumer Price Indices and in the National Accounts.

We welcome user feedback on any aspects of the Department's bus statistics including content, timing and format, by email to [bus.statistics@dft.gsi.gov.uk](mailto:bus.statistics@dft.gsi.gov.uk)

### National Statistics

National Statistics are produced to high professional standards set out in the National Statistics Code of Practice. They undergo regular quality assurance reviews to ensure they meet customer needs.

Details of Ministers and officials who receive pre-release access to these statistics up to 24 hours before release can be found here: [www.gov.uk/transport-statistics-notes-and-guidance-buses](http://www.gov.uk/transport-statistics-notes-and-guidance-buses)

### Next update

The next Quarterly Bus Statistics, for Q1 (January to March) 2014 are due to be published in June 2014.