



Department for Transport

Quarterly Bus Statistics: England Q1 (January to March) 2019

About this release

This quarterly release covers local bus passenger journeys and fares. It provides the most up-to-date statistics for monitoring trends in the local bus sector.

This release relates largely to England, in line with the coverage of DfT bus policy. Statistical tables that cover the whole of Great Britain are available online.

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



The number of local bus passenger journeys in England was 4.31 billion in the year ending March 2019, a 1.0% decrease when compared with a year earlier.

Bus use in England outside London declined by 0.7% over the same period, continuing the decline since 2009. However Q1 2019 passenger numbers were higher than Q1 2018, the first time this has happened for 5 years. In London, bus use decreased by 1.2% in the latest year but remains 10% higher than in the year ending March 2007.

In the year to March 2019, local bus fares increased by 3.3%, faster than the all items Consumer Prices Index rate of inflation (1.9%).

Local bus passenger journeys

4.31 billion journeys **↓ 1.0%**
in England in year to Mar 19 since year to Mar 18

Local Bus Fares index

^ 3.3% Local Bus Fares index in England since Mar 18
^ 1.9% All items Consumer Prices Index since Mar 18

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User feedback on future release: We are considering the scope of future quarterly releases. For more information see page 5

Table 1 summarises the latest quarterly and year ending annual figures. Figures for England are disaggregated into London, metropolitan areas (the six former metropolitan counties of Greater Manchester, Merseyside, South Yorkshire, Tyne and Wear, West Midlands and West Yorkshire) and non-metropolitan areas (covering shire counties and unitary authorities).

Table 1: Summary of latest quarterly and year ending local bus passenger journeys (seasonally adjusted) in England and Local Bus Fares index

	Local bus passenger journeys (billions)		Bus Fares Index Mar 2019 (compared with Mar 2018)
	Year ending Mar 2019 (compared with previous year)	Q1 (Jan-Mar) 2019 (compared with Q1 2018)	
London	2.20 ↓ -1.2%	0.55 ↓ -0.7%	↑ 1.4%
English metropolitan areas	0.90 ↓ -0.5%	0.23 ↑ 0.4%	↑ 3.9%
English non-metropolitan areas	1.21 ↓ -0.9%	0.30 ↑ 1.2%	↑ 4.7%
England	4.31 ↓ -1.0%	1.08 ↑ 0.1%	↑ 3.3%
England outside London	2.11 ↓ -0.7%	0.53 ↑ 0.9%	↑ 4.4%
Scotland	0.38 ↓ -2.8%	0.10 ↑ 3.9%	↑ 2.1%
Wales	0.10 ↑ 3.2%	0.03 ↑ 5.8%	↑ 3.2%
Great Britain	4.79 ↓ -1.0%	1.20 ↑ 0.5%	↑ 3.1%

Statistical tables

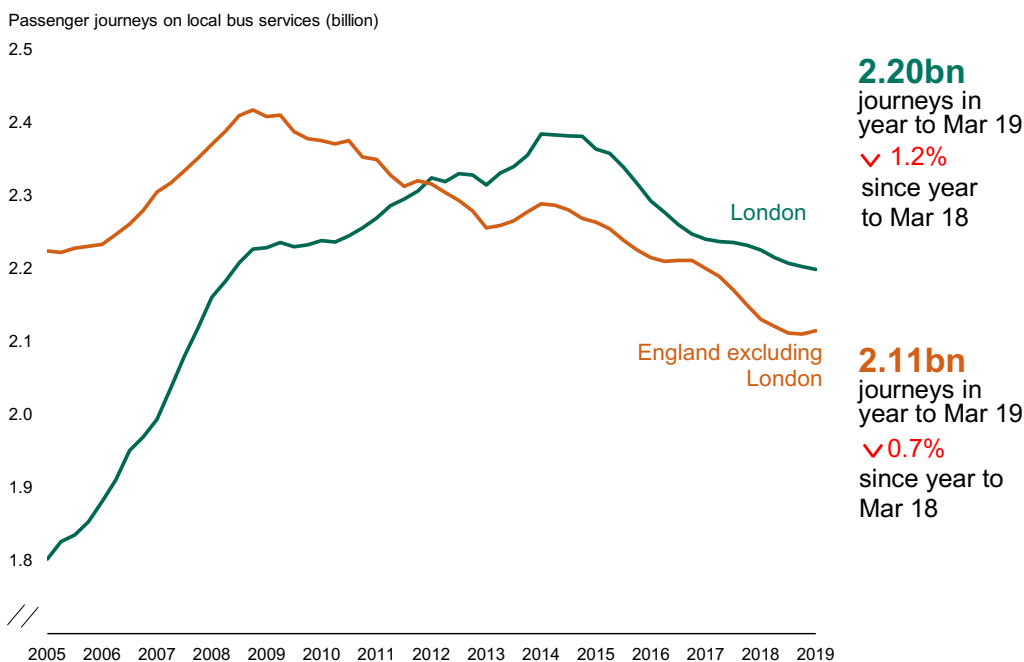
Additional tables are available online as part of the bus statistics series.

Passenger numbers can be found in table [BUS0103](#) (annual) and [BUS0106](#) (quarterly).

Bus fares index can be found in tables [BUS0405](#) (annual) and [BUS0415](#) (quarterly).

Chart 1 shows that the number of local bus passenger journeys in England outside London in the year ending March 2019 decreased by 16 million or 0.7% to 2.11 billion when compared with the previous year. Bus use decreased in London by 27 million passenger journeys or 1.2% to 2.20 billion.

Chart 1: Local bus passenger journeys (seasonally adjusted) in England outside London and London, year ending March 2005 to year ending March 2019 (table [BUS0106a](#))

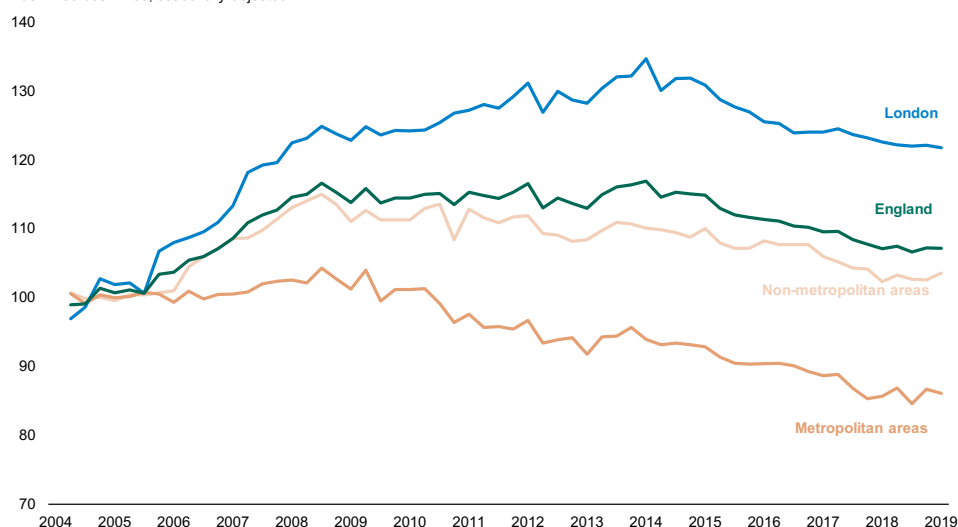


In January to March 2019, bus use decreased in London by 0.7% when compared with the same quarter in 2018. Bus use in metropolitan and non-metropolitan areas increased over the same period. **Chart 2** shows a period of declining bus use in London since early 2014. Bus use in England outside London increased by 0.9% compared with the same quarter of 2018 (January to March 2018). However, it is too early to say whether this increase in quarter one reflects a change from the long term downward trend in bus use, or is just natural variation within the downward trend.

Chart 2: Index of local bus passenger journeys (seasonally adjusted) by metropolitan area status: England, quarterly from April to June 2004 to January to March 2019 (table [BUS0106b](#))

Passenger journeys on local bus services by metropolitan area status and country: Great Britain, quarterly from 2004/05

Index: 2004/05 = 100, seasonally adjusted



Bus usage

The number of bus passenger journeys (with each boarding of a bus counted as one journey) is the key measure of bus demand.

Seasonal adjustment

Estimates of the number of bus passenger journeys are seasonally adjusted. This removes the effects of seasonal factors and the arrangement of the calendar so that quarterly comparisons can be made.

Other statistics

Average vehicle speeds by local authority in England are also published by the Department for Transport. These can be found in table [CGN0501b](#).

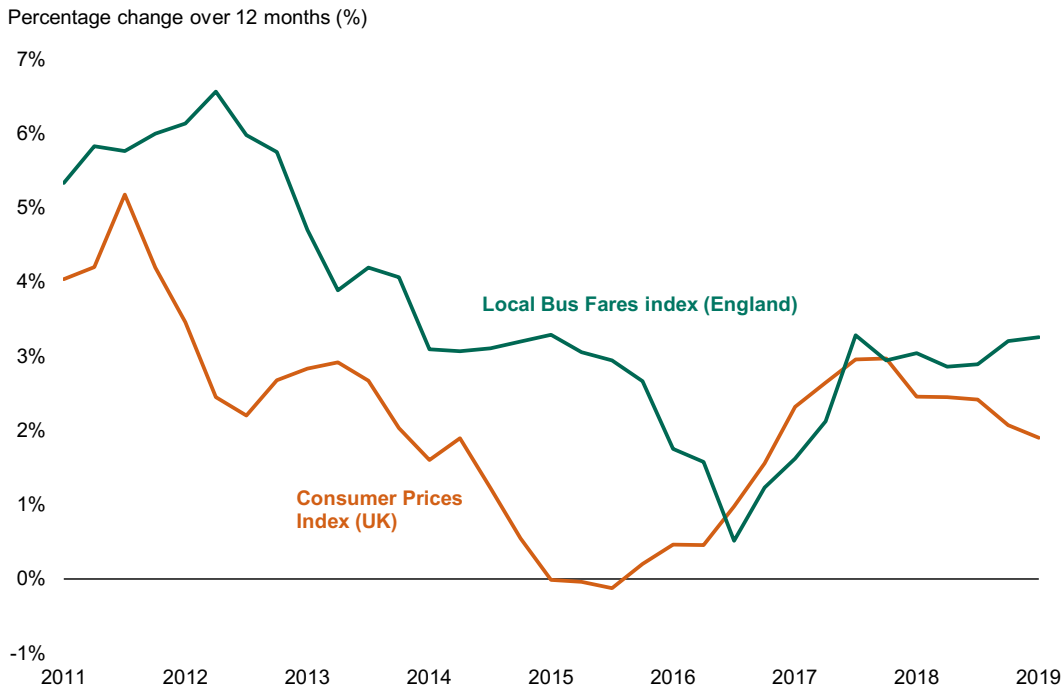
Local bus fares in England increased by 77% on average between March 2005 and March 2019¹. Bus fares have risen at a faster rate in metropolitan areas (93%) than in non-metropolitan areas (67%). The all items Consumer Prices Index (CPI) has increased by 38% over the same period, meaning bus fares have risen in real terms. **Chart 3** shows that in the past year to March 2019, local bus fares have increased by 3.3%, faster than the CPI (1.9%). Since September 2016 (**chart 3**), the increase in local bus fares and the CPI have been relatively similar, but are now showing signs of divergence again. Prior to this, the increase in local bus fares was higher than the increase in the CPI between March 2011 and June 2016.

Local bus fares index

The percentage change in bus operator receipts from passengers as a result of any fare changes. These figures provide an estimate of the change in the average cost of bus travel to the passenger but not the actual fare levels paid.

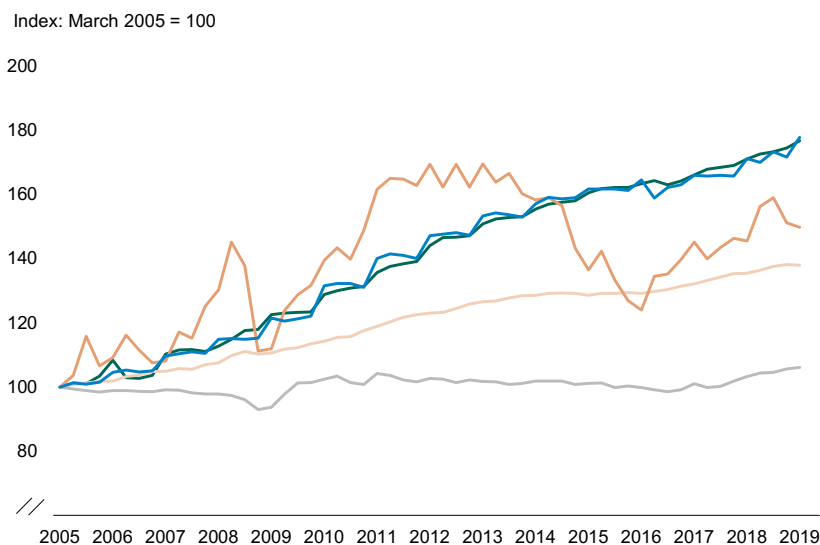
¹ The launch of the English National Concessionary Travel Scheme (ENCTS) in April 2006 resulted in some passengers who had previously paid fares being able to travel for free. As the Bus fares index reflects changes in the average costs of bus travel across all users of bus services, the ENCTS launch resulted in a one-off downward step-change in the index between March 2006 and June 2006.

Chart 3: Percentage change in Local Bus Fares index and CPI: England and UK, quarterly since March 2011, current prices (table [BUS0415a](#))



The average annual percentage change in bus fares was 2.7% between March 2013 and March 2019, similar to the average annual increase in passenger transport by rail (2.5%). In the past year to March 2019, local bus fares and passenger transport by rail have increased by 3.3% and 3.9% respectively, faster than the CPI rate of inflation (1.9%). In comparison, the price of purchasing a vehicle has increased by 2.7%. The price of fuel and lubricants has increased by 2.9% over the same period.

Chart 4: CPI and transport indices (at current prices): UK, quarterly from March 2005



Percentage change between Mar 2018 and Mar 2019

^ 3.3%
Local bus fares (England)

^ 3.9%
Passenger transport by rail

^ 2.9%
Fuel and lubricants

^ 1.9%
All items CPI

^ 2.7%
Purchase of vehicle

Local bus fares in different areas

Bus fares in London are set by Transport for London.

Outside London, fare changes will largely reflect the commercial decisions of bus operators, which in turn may 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.

Related information

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.

Passenger transport by rail in the CPI includes fares on UK overground rail, but also: London transport Fares; Euro Tunnel fares; and other underground/metro fares. The ORR also publish a Rail Fares Index measuring the change in prices charged by train operating companies to rail passengers. Further information can be found [here](#).

An annual summary of the ONS transport indices is available in table [TSGB1308](#).

Quarterly bus statistics feedback

The Department for Transport frequently reviews the statistics it produces to ensure the resources allocated to statistical activities are meeting user needs and ensuring burdens on data providers are minimised. As part of this ongoing commitment we are seeking user feedback on the continuation of the quarterly bus statistics presented in this statistical release.

Quarterly bus statistics are published four times a year, twice as statistical releases in June and December and twice as tables in March and September. The statistics are collected from a panel of the largest bus operators and Passenger Transport Executives (PTEs) in Great Britain, as well as a separate survey on fares each quarter. We would like to reduce the burden to operators' who currently need to respond up to 9 different surveys each year, and believe the quarter to quarter changes are quite varied and changes do not necessarily reflect any long term trend. At present the quarterly panel data we collect from the largest operators and PTEs is becoming increasingly complex and time consuming as operators change structures and PTEs change the way they collect data. We believe the time would be better spent improving the annual bus stats release and methodology and publishing it in a more timely manner.

The continuation of quarterly bus statistics - in any format - will be judged against users need for the latest information on the bus market in Great Britain. With this in mind, we propose three options for which we are inviting feedback:

- **Option 1:** continue collecting quarterly bus passenger data from bus operators and publish a statistical release with accompanying data tables (no change option)
- **Option 2:** continue with collecting quarterly bus data from bus operators and PTEs and publishing in spreadsheet tables but stop publishing an accompanying statistical release in any quarter. This would not remove burden on operators, but would free up some resource to improve annual bus stats release and methodology.
- **Option 3:** publish one mid-year estimate of passengers and fare changes. This would still provide users with regular information, but would remove some of the variability and uncertainty with the estimates and would also reduce some of the burden on operators providing data.
- **Option 4:** stop collecting quarterly bus passenger estimates from bus operators and PTEs and therefore no longer publish a statistical release and accompanying spreadsheet tables. Fares data will continue to be collected and released in the annual bus release and the ONS will continue to publish aggregate bus and coach fare changes. This would provide the biggest burden reduction to the industry and allow more resource time to be focussed on the main annual bus statistics. However, we recognise this would result in less timely data on potential significant changes in bus use and fares data. Although as noted, the quarterly data is both provisional and has a significant amount of natural variation in quarter to quarter movements.

The proposed changes will not affect the statistics collected and published from DfT's annual bus PSV survey. We welcome any feedback on the options proposed above, or any other suggestions to improve the bus statistics we publish. The questions below are intended as a guide if you wish to structure your response but we happy to receive more open feedback as well.

Responses can be emailed to bus.statistics@dft.gsi.gov.uk The deadline for sending responses is 31 July 2019. The outcome of this feedback will be published with the 2018/19 annual bus statistics release.

- **Question 1:** what use do you make of the quarterly bus statistics?
- **Question 2:** what if any of the proposed options presented do you think it is best for DfT to implement, and why?
- **Question 3:** Do you have any other suggestions for, or thoughts on, bus statistics more generally at DfT?

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 public service vehicle (PSV) operators, and figures are then seasonally adjusted.

For January to March 2019, data was received from 17 panel members, covering around 90% of the bus journeys made in GB. 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. Figures are also subject to revision if a member changes their methodology for collecting bus patronage data. Figures for West Yorkshire have been estimated for this release due to changes in collection methodology.

The quarterly local bus fares index is based on a sample survey of over 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 over 90% of passenger receipts in Great Britain, and the sample design

Next update

We are conducting a user feedback exercise on the quarterly bus statistics in this release. The next release date will depend on the outcome of the user feedback exercise for quarterly releases. The result will be published in the next annual bus statistics which will be published later in 2019.

Currently statistical releases accompany data tables in Q1 January to March 2019 (for release in June 2019). For the Q4 October to December 2018 released in March 2019, the online spreadsheet tables ([BUS0106](#) and [BUS0415](#)) were updated but there was no accompanying statistical release.

ensures operators in each type of area are adequately represented. The survey response rate is high, almost 100% for the last four quarters.

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).

This release includes revisions to the provisional fares data back to April 2018 reflecting the inclusion of updated data and a correction to the survey weighting. This revises down the provisional estimate of the increase in the fares index over the last year, although the increase remains higher than the change in CPI over this period.

Users and uses of these statistics

Within DfT, quarterly bus statistics 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 of the industry 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.

Further details

The notes and definitions document is available at: www.gov.uk/government/organisations/department-for-transport/series/bus-statistics.

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.



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