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| Briefing |
| Comparing bus operator fares across English city regions |
| DRAFT |
| December 2016 |

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# Introduction

* 1. This paper is an update of work originally undertaken in 2013 to compare commercial bus fare offers from individual operators across our members’ areas. Ticket price data was collected in 2016 and provides a snapshot of ticket prices across our member areas. The prices quoted might not be the most recent prices, so caution should be applied when using this data. Ticket prices can sometimes be subject to large changes which can change the structure of the ticket market and the outcomes of this work.
  2. The analysis focuses on adult, child and student bus fares.
  3. Fares are presented by company rather than by area. Calculating weighted average fares would require knowledge of the market shares of individual ticket types, which are typically deemed to be commercially confidential and therefore not in the public domain.
  4. It should be noted that there can sometimes be justification for differences in price, such as the size of a network, the quality and frequency of services and the nature of the service. It should not automatically be assumed that a higher price represents worse value for a customer.
  5. Whilst bus fares in London are uniform across operators, prices have been included for comparison purposes.

# First

## Table 1. First Adult Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| Greater Manchester | £4.20 | £14.00 | £52.00 | £520.00 |
| South Yorkshire | £5.00 | £20.00 | £74.70 | £747.00 |
| West Yorkshire | £4.70 | £20.00 | £69.50 | £695.00 |

* 1. First bus tickets continue to be significantly cheaper in Greater Manchester than in South and West Yorkshire.
  2. Whilst weekly tickets are the same price in South and West Yorkshire, daily, monthly and annual tickets are all cheaper in West Yorkshire.

## Table 2. First Child Tickets

|  |  |  |
| --- | --- | --- |
|  | **Child day** | **Child weekly** |
| Greater Manchester | £2.10 | £7.00 |
| South Yorkshire | £2.00 | £6.00 |
| West Yorkshire | £2.30 | £7.50 |

* 1. First bus tickets for children are cheapest in South Yorkshire, with West Yorkshire having the most expensive tickets.
  2. The weekly ticket in West Yorkshire is £1.50 more expensive than the South Yorkshire ticket and £0.50 more expensive than the Greater Manchester Ticket.

## Table 3. First Single Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **One mile fare** | **Three mile fare** | **Maximum fare** |
| Greater Manchester | £1.50 | £2.20 | £4.00 |
| South Yorkshire | £1.00 | £1.00 | £1.00 |
| West Yorkshire | £1.40 | £2.40 | £3.00 |

* 1. In West Yorkshire, children can purchase all single tickets at 50% of the adult price.
  2. In South Yorkshire, the ticket price comes with the caveat that some single tickets might cost more than the quoted value, but no information is available on the first website as to what price these tickets might be.

## Table 4. First Student Tickets

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Student single** | **Student day** | **Student weekly** | **Student month** | **Student term** | **Student all term** |
| Greater Manchester | - | - | - | £46.00 | £115.00 | £240.00 |
| South Yorkshire | £1.00 | - | £15.00 | - | £90.00 | £210.00 |
| West Yorkshire | - | - | - | £44.00 | £130.00 | £269.00 |

* 1. First South Yorkshire also offers a Sheffield ticket, where there is a £1 single ticket available, a £7 week and a £28 Month ticket. These are significant reductions on the South Yorkshire tickets. Similar tickets do not seem to be available for other areas in South Yorkshire.
  2. First Greater Manchester also offer Carnet tickets for routes between Manchester and Didsbury. These can either be brought in bundles of 50 tickets for £40.00 (80p per journey) or a bundle of 100 tickets for £75 (75p per ticket).
  3. Tickets in West Yorkshire are more expensive than in other zones, with an “all Term” ticket being £59 more than in Greater Manchester. The month ticket is however

## Table 5. First Other Zones

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| Greater Manchester | South Manchester | £3.40 | £11.00 | - | - |
| Manchester, Walkden and Little Hulton | - | £10.00 | - | - |
| Manchester, Middleton and Rochdale | £3.50 | £11.50 | - | - |
| Manchester and Didsbury | - | £7.50 | - | - |
| South Yorkshire | Sheffield | £3.90 | £12.50 | £42.00 | £440.00 |
| Doncaster | £4.00 | £14.00 | £50.00 | £520.00 |
| Rotherham | £4.00 | £14.00 | £50.00 | £520.00 |
| West Yorkshire | Leeds | £4.20 | £15.00 | £55.00 | £550.00 |

* 1. In Greater Manchester there is a wide range of other tickets available, but there are often only single tickets available for the other geographies.
  2. Prices are relatively similar across the different areas, although the Manchester prices are lower than elsewhere. This could reflect the restricted number of services that the tickets can be used on.
  3. It is also interesting to note that the Sheffield tickets are cheaper than the Doncaster and Rotherham tickets.

# Arriva

## Table 6. Arriva Adult Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| North East | £7.00 | £26.00 | £91.00 | £995.00 |
| Greater Manchester | £4.20 | £14.50 | £51.00 | £510.00 |
| Merseyside | £4.30 | £17.00 | £59.50 | £595.00 |
| West Yorkshire | £4.70 | £17.50 | £68.00 | £660.00 |

* 1. The price of Arriva tickets varies widely between our member areas, which is likely to reflect the size of their networks and their market share.
  2. Tickets are cheapest in Greater Manchester and are most expensive in the North East. The North East tickets cost considerably more than in other network areas.

## Table 7. Arriva Child Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Child day** | **Child Week** | **Child Month** |
| Greater Manchester | £2.10 | £7.25 | £25.50 |
| Merseyside |  | £10.00 | £35.00 |
| West Yorkshire | £2.35 | - | - |

* 1. In the North East, Arriva offers a “Teen Card” which entitles holders to make any single journey for half fare or £1 depending on which is cheaper. There are no period products offered.
  2. In Merseyside, child tickets are offered by the Local Transport Authority at £2 per day. This has become a commercial product meaning that there is no commercial offer by the operators.
  3. As with the adult tickets, fares are lower in Greater Manchester than in other areas.

## Table 8. Arriva Student Tickets

|  |  |  |
| --- | --- | --- |
|  | **Student Term** | **Student year** |
| Greater Manchester | £145.00 | £445.00 |
| Merseyside | £145.00 | £445.00 |
| West Yorkshire | £203.00 | £515.00 |

* 1. Student tickets are available on the Arriva website as either term or year tickets. The prices are the same across Greater Manchester and Merseyside, but higher in West Yorkshire. This is likely to be based on the higher adult ticket prices in West Yorkshire compared to other regions.

## Table 9. Arriva Single Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **One mile fare** | **Three mile fare** | **Maximum single fare** |
| Greater Manchester | £1.00 | £1.60 | £3.30 |
| Merseyside | £1.00 | £1.60 | £3.30 |
| West Yorkshire | £1.00 | £1.60 | £3.30 |

* 1. The price of Arriva single or return tickets was not available on their website, so we had to contact Arriva directly in order to access these prices.
  2. It appeared that the single prices are constant over the different areas that Arriva operate in.

## Table 10. Arriva Other Zones

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| North East | County Durham Saver | £7.00 | £25.00 | £85.50 | £920.00 |
| East Durham Saver | £6.90 | £26.10 | £91.00 | £995.00 |
| Bishop Auckland Saver | £4.30 | £14.00 | £50.00 | £510.00 |
| Darlington Town Saver | £3.50 | £12.60 | £40.00 | £430.00 |
| Newton Aycliffe and Darlington Saver | £5.60 | £16.30 | £51.00 | £480.00 |
| Redcar Saver | £4.00 | £11.30 | £41.00 | £410.00 |
| Teesside and East Cleveland Saver | £4.40 | £16.90 | £61.00 | £550.00 |
| Tees Valley Saver | £7.00 | £25.00 | £85.00 | £944.00 |
| North West | Liverpool Plus | £4.30 | - | - | - |
| Wirral | £4.30 | - | - | - |
| Halton | £4.00 | £16.00 | £56.00 | £560.00 |
| Southport | - | £15.50 | £54.50 | £545.00 |
| West Yorkshire | Leeds | £4.00 | £14.00 | - | - |
| Wakefield | £4.20 | £14.50 | - | - |
| Yorkshire | £5.60 | £20.50 | £74.00 | £740.00 |
| West Midlands | Black Country | £4.00 | £11.50 | £40.00 | - |
| Midlands Area | £6.20 | £25.00 | £70.00 | £650.00 |

* 1. Arriva offer a wider range of other regional products, especially in the North East where eight different zonal tickets were available with a full range of products.
  2. In the North East, further County Durham Savers are available at smaller scales. There are a further four tickets covering Durham City, Durham City + Brandon, and Durham District.

# Stagecoach

## Table 11. Stagecoach Adult Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| Greater Manchester | £4.00 | £13.50 | £50.00 | £575.00 |
| Merseyside | £4.00 | £14.00 | £50.00 | £540.00 |
| North East | £3.95 | £13.35 | £49.70 | £594.00 |
| South Yorkshire | £3.90 | £12.50 | £42.00 | £440.00 |
| West Midlands | £3.90 | £12.95 | £45.10 | - |

* 1. The price of adult day tickets across the various operations is relatively similar, however, there are wide variations as the time period increases.
  2. The South Yorkshire Ticket, which covers Sheffield only, is similar in price apart from the annual ticket, which is significantly cheaper than in other areas.

## Table 12. Stagecoach Child Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Child day** | **Child weekly** | **Child monthly** |
| Merseyside | £2.00 | £7.00 | - |
| South Yorkshire | £2.00 | £5.00 | £22.00 (includes tram) |
| West Midlands | £2.90 | - | - |

* 1. There seem to be very few child tickets available through the Stagecoach website. We intend to look into this further to understand the situation.

## Table 13. Stagecoach Single Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **One mile fare** | **Three mile fare** | **Maximum single fare** |
| Greater Manchester | £1.90 | £2.40 | £3.20 |
| Merseyside | £2.00 | £2.00 | £2.00 |
| North East | £1.60 | £2.35 | £5.15 |
| South Yorkshire | £1.50 | £2.30 | £5.80 |
| West Midlands | £2.00 | £2.00 | £2.00 |

* 1. Single tickets are offered for job seekers at half the commercial fare.
  2. In some cases, particularly in South Yorkshire and the North East, single fares can be higher than the relevant day ticket for the journey.

**Table 14. Stagecoach Student Tickets**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **Single ticket** | **Student week** | **Student month** | **Student term** | **Student year** |
| Greater Manchester |  | - | - | - | £105.00 | £220.00 |
| Merseyside |  | - | - | - | £110.00 | 265.00 |
| North East |  | - | - | - | £107.00 | £250.00 |
| South Yorkshire | Sheffield Student Bus Xtra | £1.00 | £7.00 | £28.00 | £90.00 | £230.00 |
| Sheffield student tram megarider | - | - | £35.00 | - | £230.00 |
| Sheffield student bus and tram megrarider | - | - | £39.00 | - | £272.00 |
| West Midlands |  | - | - | - | £125.00 | £274.00 |

* 1. The student ticket offer is quite varied across the different areas. Only in South Yorkshire is a single ticket advertised for students over 18 years of age. In Other areas there are only term and annual tickets

## Table 15. Stagecoach Other Zones

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| South Yorkshire | Sheffield megarider (bus and tram) | £4.00 | £13.50 | £46.00 | £540.00 |
|  | Sheffield Megarider Plus (bus and tram) | - | £15.50 | £55.50 | £663.00 |
| North East | Tyne and Wear Plus | £5.05 | £15.45 | £59.80 | £719.00 |
|  | South Shields Megarider | - | £10.80 | £41.20 | £495.00 |
|  | Sunderland Megarider | £3.25 | £12.00 | £46.05 | £553.00 |

* 1. In South Yorkshire, the main “other” zones involve the inclusion of tram tickets. This increase the price of the ticket, but is cheaper than buying separate bus and tram tickets.
  2. There are a range of tickets available across the North East covering the main areas of the Network outside of Newcastle.

# Go-Ahead

## Table 16. Go-Ahead Adult Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| North East | £7.80 | £32.00 | £97.00 | - |

* 1. The Go-Ahead group only operates in one of our members areas, meaning it is not possible to analyse price across areas.
  2. There was no annual ticket available through the Go-Ahead website only pay monthly tickets that can be rolled over to make up an annual ticket. This provides no saving on the monthly ticket so has not been included as an annual product.

## Table 17. Go-Ahead Child Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Single fare** | **Child day** | **Child weekly** | **Child monthly** |
| North East | £1.00 | £3.75 | £15.50 | £58.00 |

* 1. A range of child tickets are available of Go-Ahead buses. The £1 single fare is available on most services. The monthly ticket must be paid in advance by direct debit.

## Table 18. Go-Ahead Single and Return Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **One mile journey** | **Three mile journey** | **Maximum fare** |
| Single | £1.50 | £2.80 | £4.10 |
| Return | £2.90 | £4.70 | £5.90 |

* 1. Single and return journeys have been calculated using the X1 service into and from Newcastle centre.

## Table 19. Go-Ahead Student Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Student day** | **Student weekly** | **Student monthly** |
| North East | £3.75 | £15.50 | £58.00 |

* 1. These tickets are available to anyone in full time education. They are the same price as the child tickets, although there is no single ticket available.
  2. Tickets are also available for apprentices at the same price.

## Table 20. Go-Ahead Other Zones

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **Adult day** | **Adult weekly** |
| North East | Durham Saver | £3.15 | 12.15 |
| North Tyne Saver | £3.95 | £13.15 |
| Peterlee Saver | £3.25 | £10.75 |
| South Tyneside Saver | £3.65 | £11.90 |
| Sunderland Saver | £3.65 | £13.35 |

* 1. Monthly tickets are priced by the number of zones that you need to travel in. The pricing structure is as follows

## Table 21. Go-Ahead Annual zone tickets

|  |  |
| --- | --- |
| **Zones** | **Adult Monthly** |
| One Zone | £60.50 |
| Two Zones | £79.50 |
| Three Zones + | £97.00 |

* 1. Whilst the price of day and week tickets varies across the zones, the price of monthly tickets is set across the region.

# National Express

## Table 22. National Express Adult Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| West Midlands | Cash £4.40  PAYG £4.20  e-  Daysaver/Bulk buy £3.80 | £17.00 | 4 week price £60.50  Monthly Direct Debit price  £54.50 | £654.00 |

* 1. National Express offer an adult ticket for all time periods. The annual ticket offers slightly more than a month’s discount when compared to shorter period tickets. Pay as you go tickets and direct debit tickets are available at a lower price than the cash alternative.

## Table 23. National Express Child Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Child single** | **Child Day** | **Child weekly** | **Child monthly** |
| West Midlands | Cash £1.15  PAYG £1.10 | Cash £3.00  PAYG £2.90 | £8.50 | 4 week price £30.25  Monthly Direct Debit price  £26.50 |

* 1. There is no day ticket or annual ticket available for children. The period tickets are 50% of the adult fares.

## Table 24. National Express Single and Return Tickets

|  |  |  |  |
| --- | --- | --- | --- |
|  | **One mile journey** | **Three mile Journey** | **Maximum single fare** |
| Adult Single | Cash £1.00 (or £1.90 outside of  city centre)  PAYG £0.90 (or £1.80 outside of  city centre) | Cash £2.00  PAYG £1.90  This fare is not for a three mile journey but within the Coventry area only | Cash £2.30  PAYG £2.20 |

* 1. There is a £1.00 ticket for journeys less than one mile in Birmingham city centre. Outside of Birmingham, this ticket price is increased to £1.90. Pay as you go tickets are cheaper than case fares.

## Table 25. National Express Other Zones

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| West Midlands | Black Country | - | £15.30 | 4 week price £53.00  Monthly Direct Debit price  4£7.50 | £570.00 |
| Coventry | Cash £4.00  PAYG £3.80  e-  Daysaver/Bulk buy £3.70 | £14.50 | 4 week price £50.00  Monthly Direct Debit price  £45.00 | £540.00 |

* 1. Tickets were available for all time periods apart from a day ticket for the Black Country zone.

## Table 26. National Express Student Tickets

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **4 Week**  **(Available on mobile app only)** | **Monthly Direct Debit** | **Academic Term** | **Academic Year** |
| West Midlands | West Midlands | £39.00 | £39.00 | £155.00 | £380.00 |
| Black Country | £34.00 | £34.00 | £135.00 | £340.00 |
| Coventry | £29.00 | £29.00 | £117.00 | £290.00 |

* 1. Student tickets are available for a number of zones across the West Midlands. There is no Birmingham ticket listed.

# Transport for London

## Table 27. Transport for London Adult Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| London | £5.00 | £21.20 | £81.50 | £848.00 |

* 1. Tickets in London cover use of both the bus and the tram and can be used on the entire transport for London network.

## Table 28. Transport for London Child Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| London | £2.25 | £10.60 | £40.80 | £424.00 |

* 1. Child ticket prices in London are for under 16s. Anyone under the age of 11 is able to travel for free.
  2. This discount is also available to jobseekers. Although they are not able to access an annual pass at a discounted rate.

## Table 29. Transport for London Student Tickets

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Adult day** | **Adult weekly** | **Adult monthly** | **Adult annual** |
| London | £4.50 | £14.80 | £56.90 | £592.00 |

* 1. Student tickets are for anyone over the age of 18 in fulltime education and are also available to apprentices.

## Table 30. Transport for London Single and Return Tickets

|  |  |  |
| --- | --- | --- |
|  | **Pay as you go** | **Daily cap** |
| Adult | £1.50 | £4.50 |
| Child | £0.75 | £2.25 |

* 1. No cash fares are available on the TfL network. Payment must either be made with an Oyster card or using contactless payment. Daily capping automatically means that you get a day ticket if this is the best value journey for your tickets. You do not have to select this in advance.