Scrutiny Panel - Short Distance Fares
Evidence base

Contents

Briefing – Short Distance Fares

1 Key points

1.1. 77% of public transport journeys in Merseyside are made by bus.

1.2. Since 1997/98 the number of bus passenger journeys on Merseyside has fallen by 23%.

1.3. People on lower household incomes make greater use of the bus than those living in more affluent areas.

1.4. A number of core cities see a ‘short hop’ ticket available from some operators; this is a ticket priced at a lower level than the typical flat fare product, which is only valid for a set number of stops or within a given area.

1.5. Short journeys, for single cash fares in the Liverpool City Region (LCR) are relatively expensive in comparison to other city regions.

1.6. Cash fares can be different across the LCR districts. Fares are typically charged at a flat rate up to 6 miles within Liverpool but vary from 3 miles in the other districts

1.7. Taxi fares (both hackney and private hire) are often cheaper where two or more people are travelling together but bus fares represent better value over longer distances, and this is reflected with the increases seen in the average journey length.

1.8. The average pay of part-time workers in Merseyside has risen by 1.4% per annum over the last 5 years, and that of full-time workers by 1.8% per annum; by contrast the Retail Price index has risen by 4.2% per annum over the same time.

1.9. The cost of the bus has risen significantly faster than other modes of transport (155% from 2000, compared to 68% for Merseyrail and 22% for motoring costs) – albeit noting that the average bus fare has shown a decrease in the last year.

1.10. Transport Focus has identified that 2 of the top 5 priorities for improvements to bus services amongst paying customers are better value ticketing and ticketing that can be utilized on all bus companies.

1.11. There is often significant difficulty in customers trying to track down information about bus fares; Transport Focus has identified that one of the two priorities for bus stops is to have information on fares. Few bus companies publish fare tables or have them on the internet.

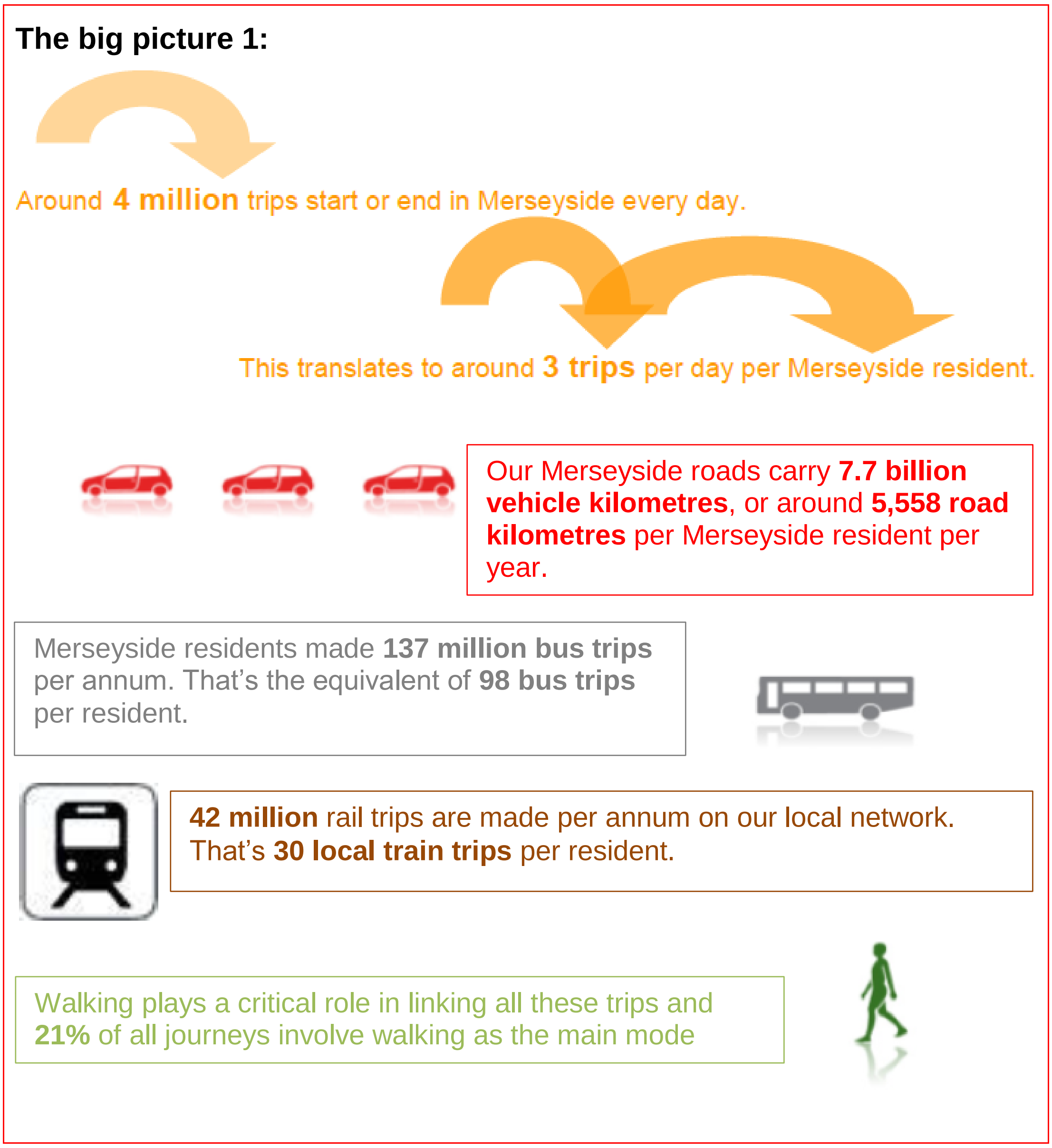
1.12. Bus operators’ prepaid tickets offer significant savings, compared both to single cash fares and Merseytravel products, but there can be drawbacks preventing their use, especially amongst part time workers and low income groups.

1.13. Over the last 10 years there has been a significant rise in the number of journeys undertaken using operator prepaid tickets (up 216%) and a significant drop in the number of journeys undertaken using cash fares (down 66%). Over this period, the number of journeys undertaken using Merseytravel products (Saveaway, Trio, Solo) also showed a *net* drop (down 24%) – but note this has risen over the last three years (journeys undertaken by Merseytravel products being up by 10% in the period 201112 to 2014/15).

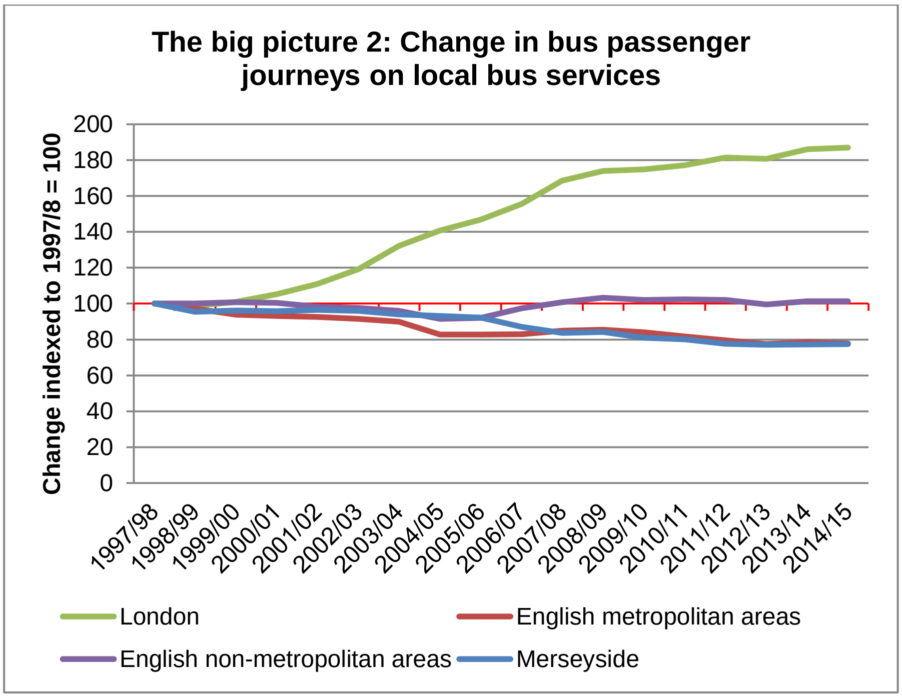
1.14. A report by Aecom in 2010 has identified that a 10% increase in bus fares would result in a 3.4% drop in demand for bus; there would be a resultant rise in rail and car use.

2 The Big picture – Public Transport in the City Region

2.1 77% of public transport journeys in Merseyside are made by bus.



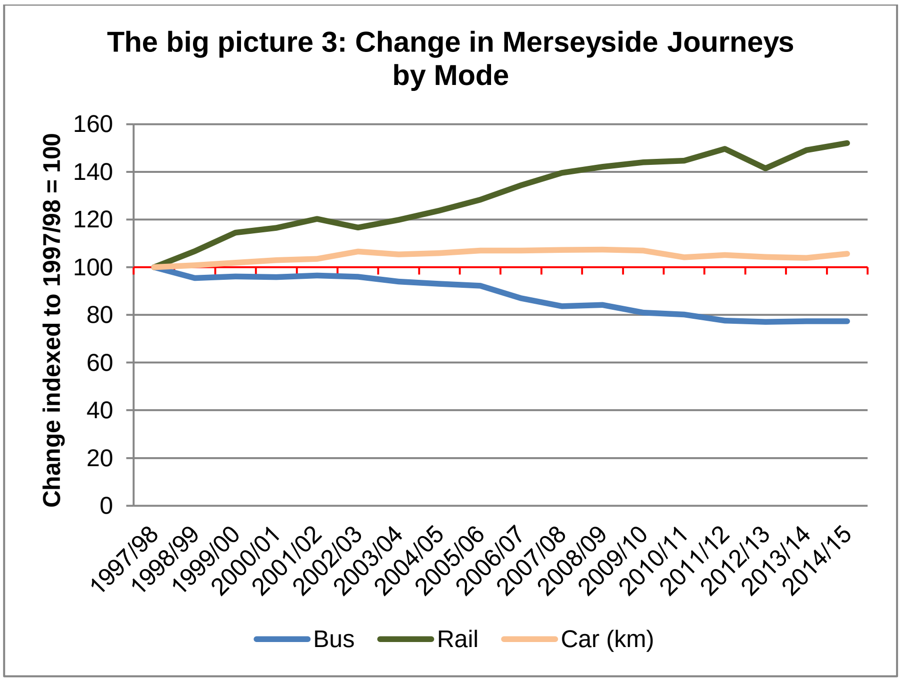
Source: Travel in Merseyside, Countywide Household Survey (CWS 2013), LCR Transport Model, DfT Statistics.



Source: DFT statistics / Merseytravel Annual Statistical Monitor

2.2 Since 1997/98 the number of bus passenger journeys on Merseyside has fallen by 23%; the average for all metropolitan areas is a drop of 22%. It is worth noting that Merseyside saw a small rise over the last year (one tenth of a per cent), while all metropolitan area experienced a drop of 1%. In Non-metropolitan areas the number of bus journeys has been relatively stable.

2.3 Over this period, bus passenger journeys in London have <u>increased</u> by 87%.



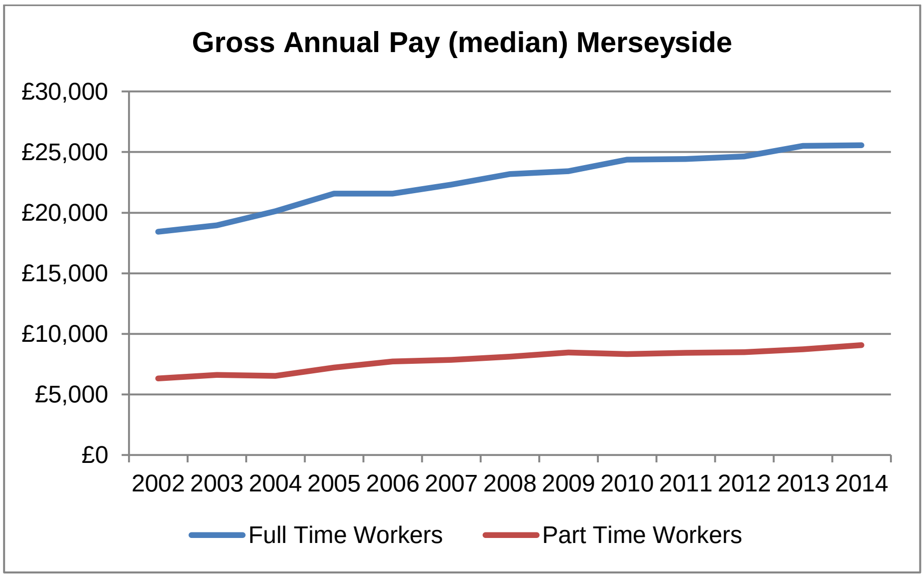
Source: DFT statistics / Merseytravel Annual Statistical Monitor

2.4 Apart from a dip in 2012/13 (owing to station refurbishment), rail journeys in Merseyside have shown strong growth and are up 52% overall on 1997/98, whilst car km has shown slower growth (up 6% overall).

3 Household income and modal choice

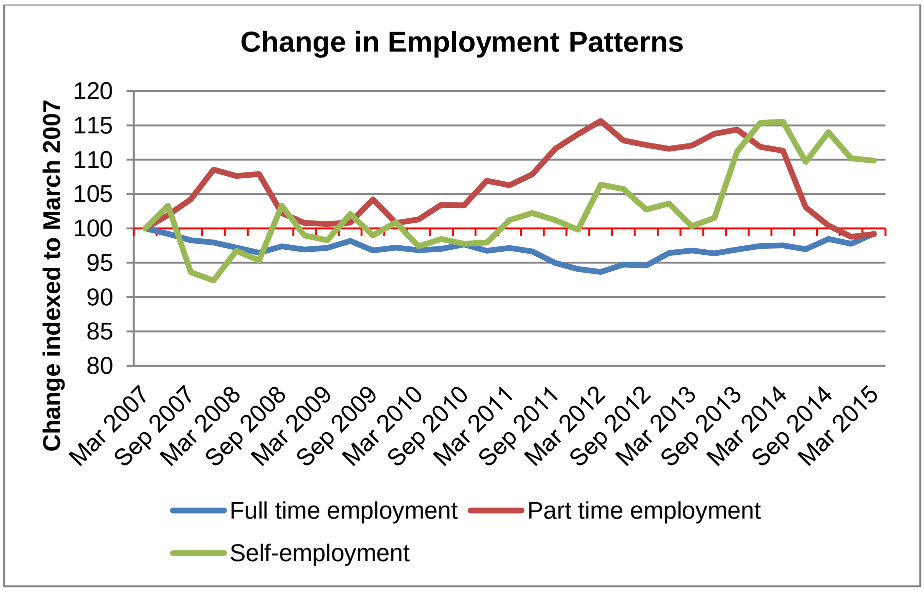
3.1 In 2014 the average (median) wage in Merseyside was £20,982 (£25,572 for full time workers and £9,060 for part-time workers).

3.2 The average pay of residents in the area working full-time has risen by just an average 1.8% per annum over the last five years, and that of those working part-time by an average 1.4% per annum. Over the same time, the Retail Price Index (May indicators) showed a growth of an average 4.2% per annum, an indicator of the strain being placed on household budgets.



(Source: Annual Survey of Hours and Earnings, ONS)

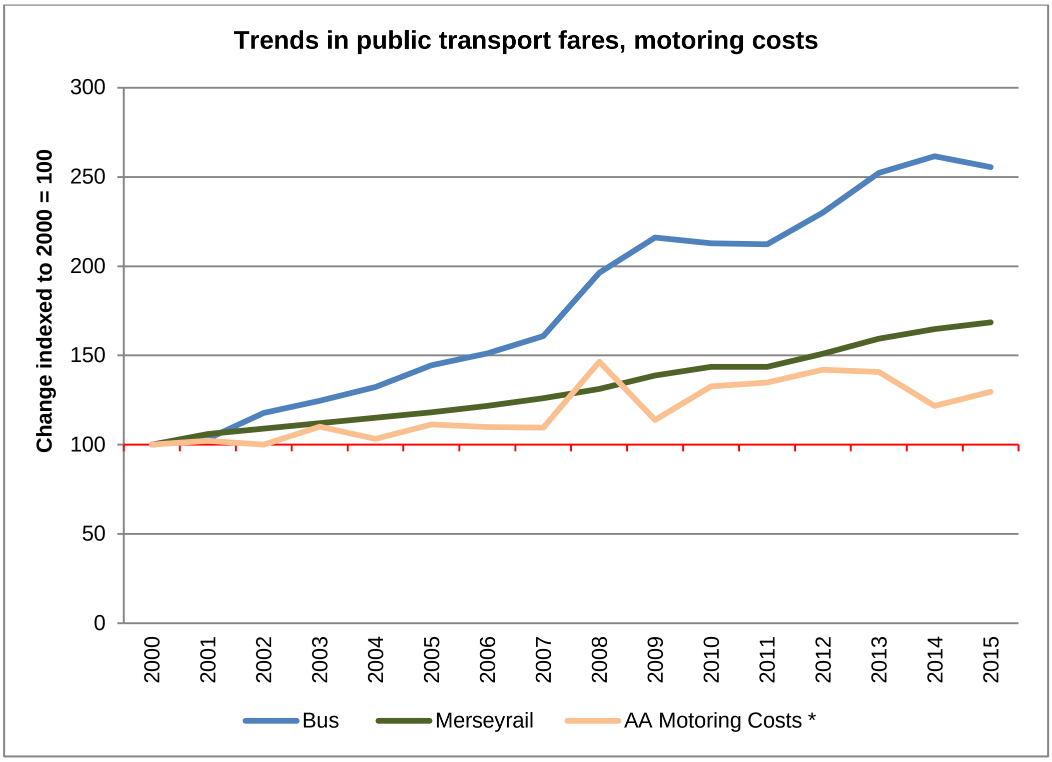
3.3 Following the recession, there was a trend of increasing levels of part-time employment and reducing levels of full-time employment. Although these trends now show some reversal, full time employment in particular has yet to attain pre-recessionary levels. This has significant implications for levels of disposable income, not least in choices of expenditure on transport.



(Source: Annual Population Survey, ONS)

4 Changes in transport costs

4.1 The cost of the bus has risen significantly faster than other modes of transport – up 155% since 2000 compared to 68% for Merseyrail and 30% for motoring costs. (Although over the last year bus fares were reduced by 2.3% compared to a 2.2% increase for rail).

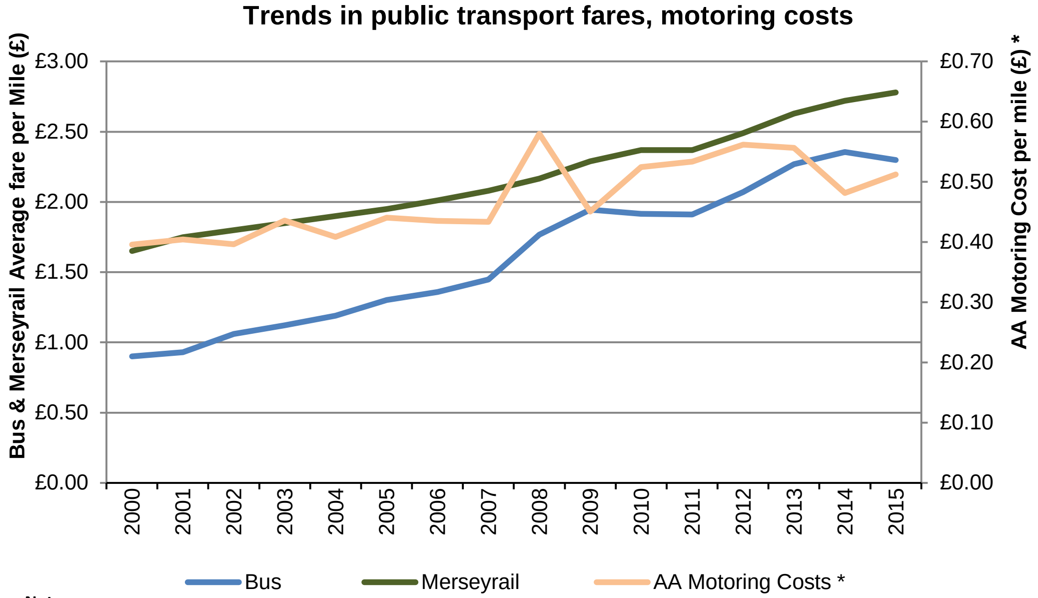


Source: Merseytravel Annual Statistical Monitor

<u>Note for charts:</u>

Average bus fares are calculated from a ‘basket’ of cash fares. Fares tables are obtained for 33 key routes of the major operators. The routes are selected on the basis of running for a distance of at least 12 miles and ensuring each of Merseyside’s five districts are represented by several routes (including some cross-river routes) with both commercial and supported fares being used.

The average fare is a weighted mean average, drawn from the % of journeys made by each operator, the average standard single fare of each operator, weighted by the average distance travelled (to allow for the fact that whilst many fares are ‘flat rate’ this is by no means universally the case).



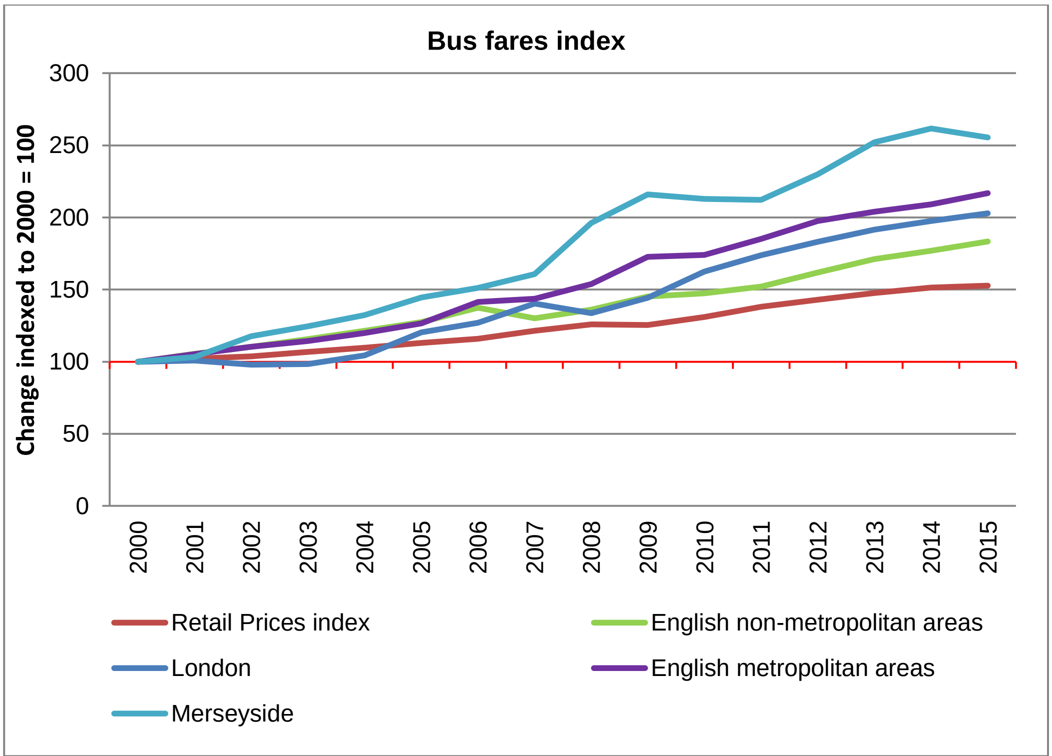
Notes

* AA Motoring costs figures refer to total running cost per mile for a petrol fuelled car costing between £13,000 and £18,000 new running on unleaded fuel, travelling 10,000 miles in a year,. The latest data available on the AA website is correct for July 2014, when unleaded petrol was 129.0 pence per litre. The April 2015 price of unleaded petrol has been estimated to be 113.3 pence per litre.

The AA no longer classifies vehicles by engine size for cost purposes. This price range has been selected as most closely matching

Source: Values underlying the index within the Merseytravel Annual Statistical Monitor

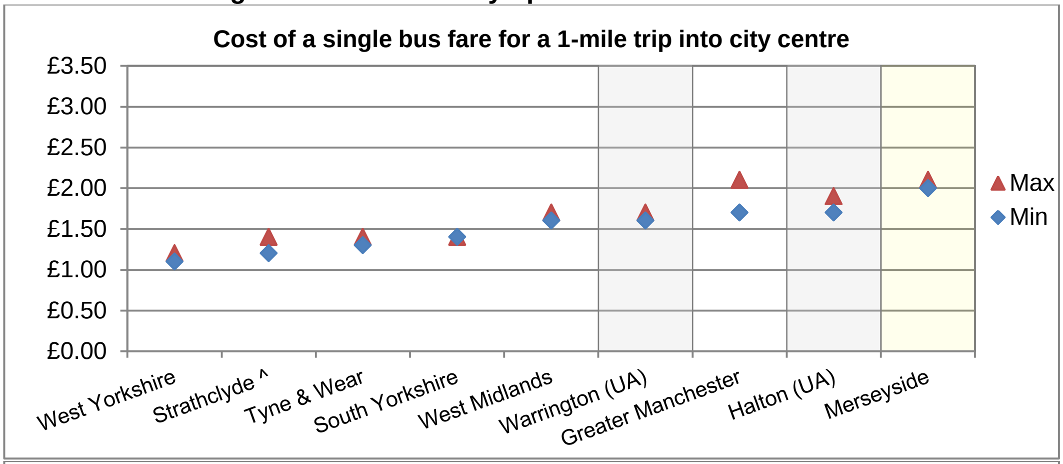
4.2 The graph below shows Merseyside's fares in comparison with London, all Metropolitan areas, Non-metropolitan areas and the Retail Price Index (RPI). Merseyside (and indeed all Metropolitan areas) bus fares have increased at a greater rate than RPI or the London average: The reference to wage increases mentioned in 3.2 also needs to be remembered here.

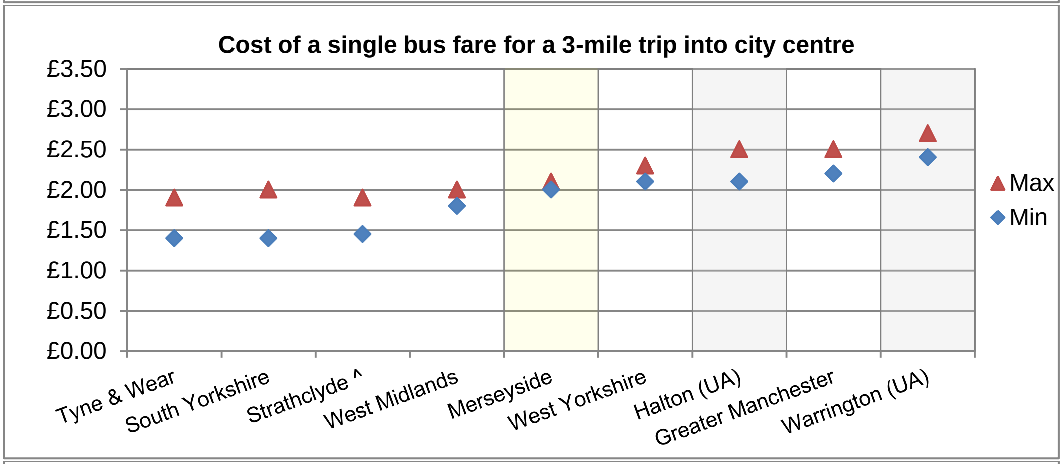


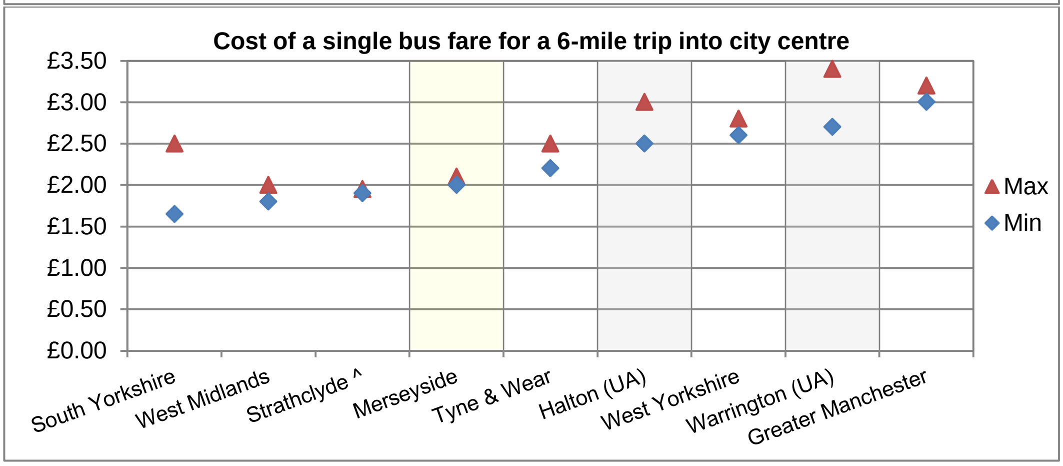
Source: DfT returns, Merseytravel Statistical Monitor 2014/15.

5 Comparison of fares by Distance

Single cash fares for key operators – Urban areas







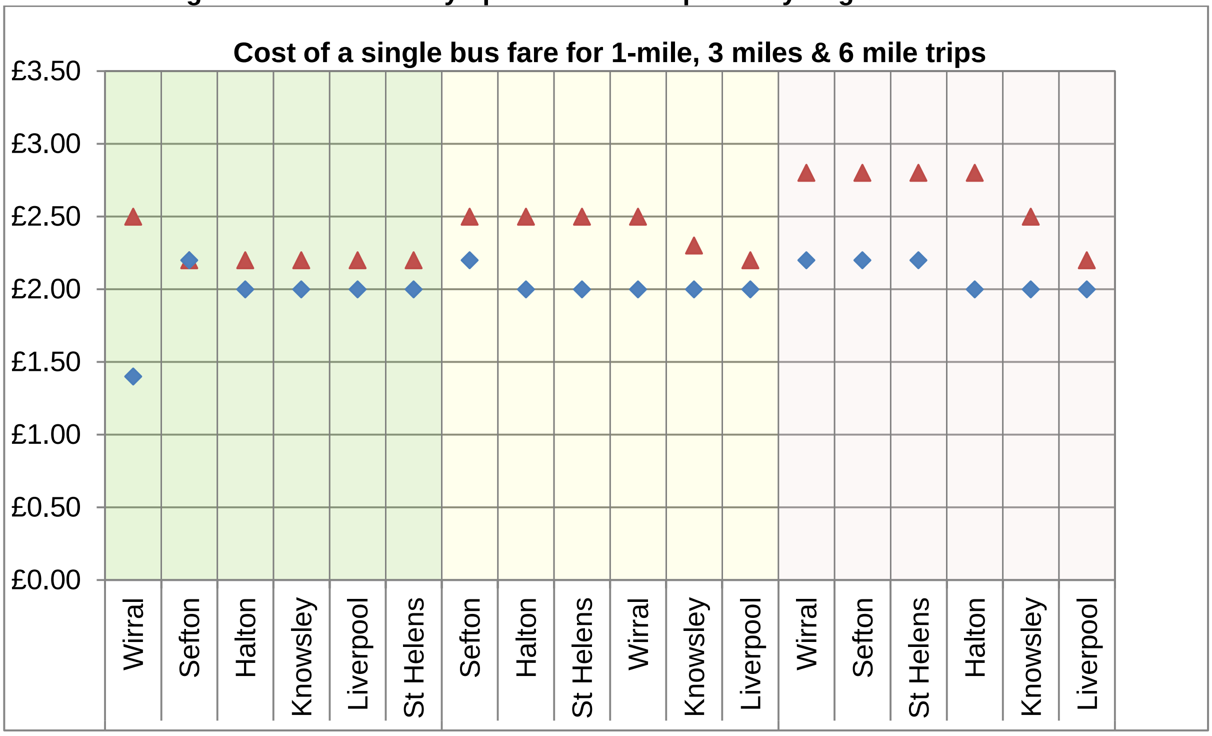
Source: PTEG, 2013,(^ Strathclyde 2012 data),
Halton & Warrington Unitary Authorities; fares looked at for journeys only within their boundaries 2015 fares.

5.1 A key factor emerging is that bus cash fares on Merseyside are relatively expensive for shorter journeys compared to other areas. Also many other major cities including Birmingham, Cardiff, Glasgow, Leeds, Nottingham, and Sheffield have short hop single tickets available which are often cheaper than standard single tickets. These short hop tickets are often for 1-5 stops or within a designated zone or city centre area. (See section 5.4 - the Liverpool City Region doesn't have short hop tickets available so fares tend to be more expensive however see below re some routes in Wirral. This is outlined further in the appendix.)

5.2 As distance increases, the 'flat fare' approach means that fares on Merseyside begin to appear better value than those in some other areas – though South Yorkshire, the West Midlands and Strathclyde remain cheaper.

5.3 The charts below detail the variance that exists for bus fares within each Merseyside district:

Single cash fares for key operators – Liverpool City Region Districts



Source: Operator fare tables 2014

- The majority of routes in Liverpool are flat fares up to the first six miles.
- In St.Helens, fares begin to increase from 3 miles when traveling out of the town centre. Journeys from Liverpool to St Helens only show fare increase around 7miles
- Routes in Knowsley generally have flat fares over the first six the miles (From Liverpool). As you travel though Knowsley towards Liverpool fares can reach £2.30 at 3 miles and go up to £2.50 at 6miles.
- Fares in Halton are at the flat rate up to 3 miles travelled. Fares then show steady increases at 3miles and again at 6miles
- Fares in Sefton are the same for one mile in all areas (£2.20). The distance covered by the flat fare tends to decrease the further north journeys start, e.g; you can travel up to 6 miles for the minimum fare from Bootle, but only up to 2 miles when making journeys that start in Southport. Journeys that start further north show prices increases at shorter distances (£2.50 to 2.80 over a range of 3miles to 6 miles).
- In Wirral fares show staged increases from 1 mile on several routes. NOTE: Some routes in Wirral appears to offer something equivalent to

a ‘short hop’ ticket, which results in some lower fares (this being by the same operator). Steep increases occur at 3 miles and 6miles when compared to the other districts.

5.4 “Short-Hop” fares –other areas

As mentioned in 5.1, a number of operators provide for “short hop” fares within core cities; these are fares priced below the typical flat fare for the area, and cover a duration of a number of stops, one fare stage, or a defined area.

Some examples are shown below, more details of which are contained within the Appendix.

City	Operator	Distance	Fare
Sheffield	First South Yorkshire	Within City Centre	£0.50
Cardiff	Cardiff Bus	Designated zones	£1.00
Nottingham	Nottingham City Transport	1 fare stage	£1.10
Glasgow	First Glasgow	5 stops	£1.20
Leeds	First Leeds	4 stops	£1.30
Birmingham	National Express West Midlands	Within the Middle Ring Road	£1.90

Operator websites 2015

6 Prepaid Tickets

6.1 Single cash fares in Merseyside are high in relation to operators' prepaid tickets. These prepaid products can offer significant savings over purchases of separate single tickets.

6.2 People on lower incomes may be less likely to afford weekly / monthly prepaid tickets and so are disproportionately affected by high cash fares for single trips.

6.3 This situation is exacerbated when we come to look at those in part time employment (such as those working 2 or 3 days a week). Without being able to benefit from weekly/monthly ticket savings, their costs can be approximately 33% higher *pro rata* than those on a weekly ticket and 50% higher *pro rata* than those on a monthly ticket. (Exact levels depend on the operator / cash fare being compared).

6.4 A further complicating factor can be where someone travels outside of the busiest times (such as evenings and weekends, perhaps because of shift patterns or education) and where the operator providing the journey is not the same across all time periods. For example; the 464/164 Birkenhead to New Ferry, run by Arriva during the day and Avon (supported) during the evenings. This removes the ability of these passengers to benefit from the savings offered by the operator prepaid tickets.

- (NB – this is less of an issue on the QBN routes with their improved evening/weekend frequencies and tickets being interchangeable, but there are parts of the bus network where this problem remains).

6.5 As the tables below show, there can be significant savings when comparing between Merseytravel and operator prepaid products. (Summary example for travel in the Liverpool area shown below – fuller details within the appendix).

	Saveaway *	**Trio**	**Solo**	**Arriva**	**Stagecoach**	**Halton**	**Warrington**
Daily	*£3.90*	n/a	n/a	£4.20	£3.90	£3.80	£5.95
Weekly	n/a	£21.90	£18.00	£16.00	£13.50	£15.00	£25.50
Monthly	n/a	£77.50	£58.30	£56.00	£48.00	£61.00	£90.00

** Saveaway tickets are only valid for off peak travel (Not before 09:30 except at weekends & bank holidays).*

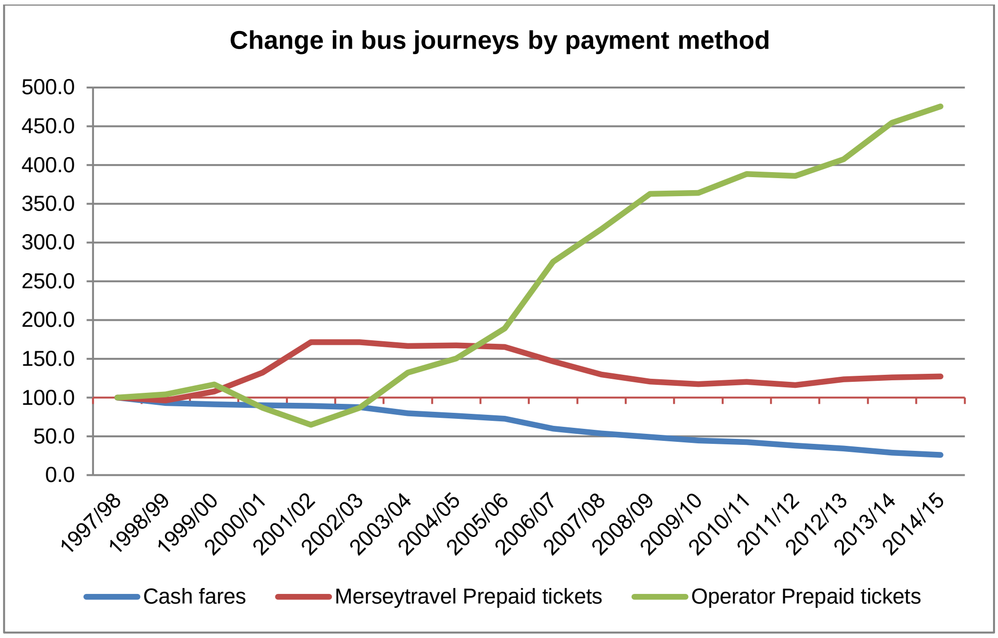
. There are savings of at least two pounds per week for passengers who opt for an operator weekly ticket rather than a Solo. In Halton, the monthly ticket shows smaller savings against Solo tickets. Prepaid prices in Warrington are more expensive in comparison.

6.6 Prepaid tickets for key operators in other areas compared with Merseyside key operators are shown below:

	Daily:	Weekly:	Monthly:
Tyne & Wear:	£3.90 to £7.00	£12.80 to £32.00	£49.20 to £105.84
West Midlands	£4.20	£16.50	£58.50
West Yorkshire	£4.70	£20.00	£68.00
South Yorkshire	£3.90	£20.00	£74.70
Greater Manchester	£4.10	£13.50	£50.00
Greater Glasgow	£5.75	£21.00	£59.00
Bristol	£6.00	£22.00	£80.00
Merseyside	**£3.90 to £4.20**	**£13.50 to £16.00**	**£48.00 to£56.00**

Operator websites 2015

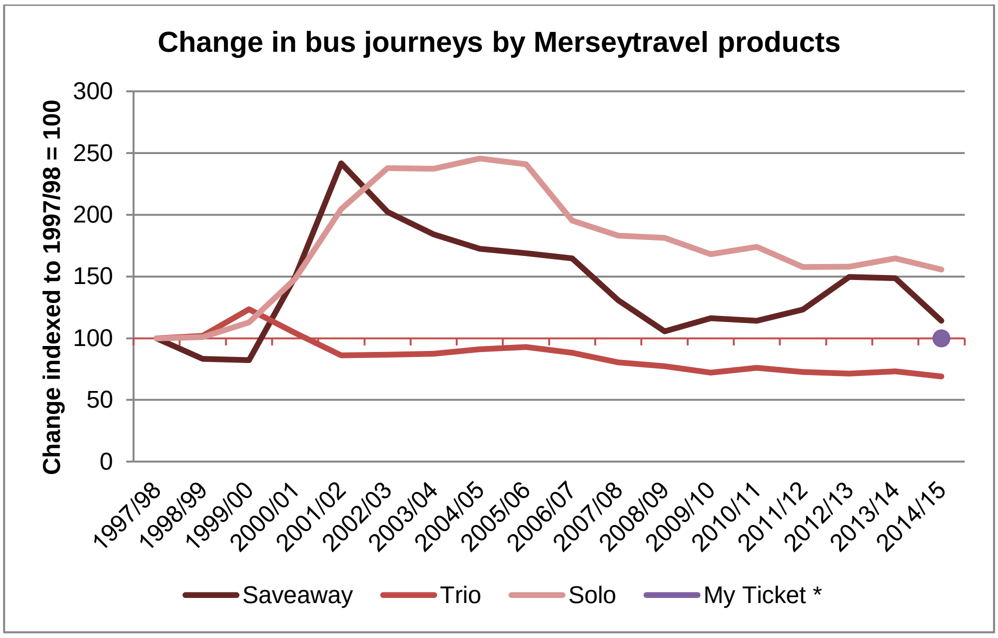
Daily operator prepaid tickets on Merseyside show good value in compassion to other areas. Solo weekly and operator weekly tickets are more affordable in comparison to most other areas. Operator monthly tickets on Merseyside show comparable prices with Greater Manchester.



Source: Merseytravel Annual Statistical Monitor
Note: Merseytravel Prepaid tickets covers Saveaway, Trio and Solo products – see overleaf.

6.7 The chart above highlights the rise in popularity of operator prepaid tickets (up 216% over the last 10 years), against a steep drop in the use of cash fares (down 66% over this period).

Over the last three years there has been a growth in journeys using Merseytravel prepaid products (following previous dip, strongly associated with the recession). Merseytravel prepaid products now include a new ticket for young people; “MyTicket” which proved to be popular in its first year of sales (2014/15 – see next page). It is now available in Halton.



Source: Merseytravel Annual Statistical Monitor

6.8 The above displays what has occurred in terms of bus journeys made using Merseytravel products. Specifically, if we look at the last 10 years:

Journeys made by **Solos** have dropped by 37%.
With a decrease of 1% in the last 2 years, showing little recent change.

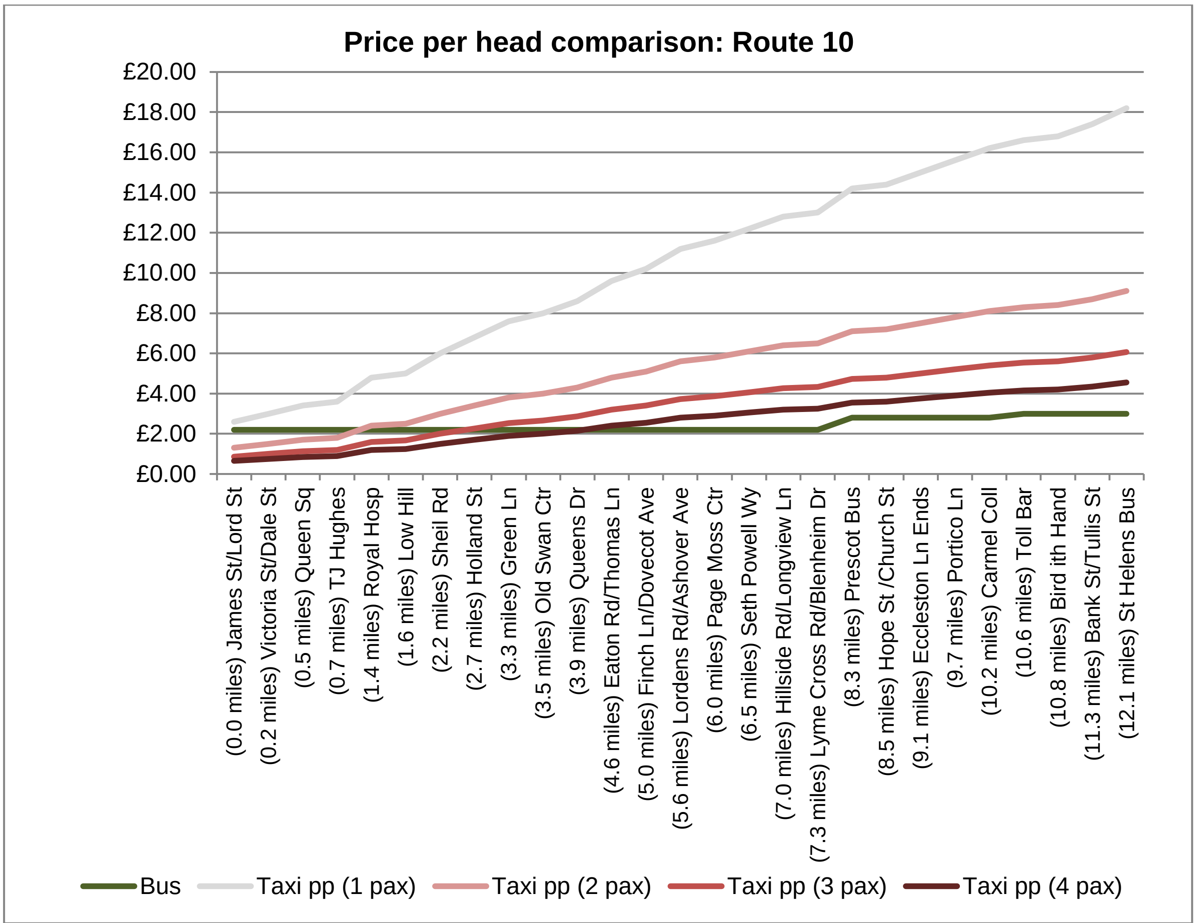
Journeys made by **Saveaways** have dropped by 34%.
With a decrease of 24% in the last 2 years, although see the point below regarding MyTicket.

Journeys made by **Trios** have dropped by 24%.
With a decrease of 3% in the last 2 years, showing little recent change.

* A new bus only ticket, **MyTicket** for young people was launched in May 2014. It has proved to be popular, its use accounted for 3 million bus journeys by the end of March 2015

7 Comparison of Bus vs. Taxi fares

7.1 Given the current policy of many operator's charging 'flat fare' levels, regardless of distance travelled, this can mitigate against some shorter journeys being taken by bus. In particular, the impact of flat fares on some journeys can make the bus relatively good value for longer journeys, but where two or more people travel together on shorter journeys the per capita taxi fare is better value. This is shown in the chart below.



Liverpool City Council Hackney tariff tables / Arriva fare tables, Policy Research team, 2015

7.2 We also note that taxi fares within Merseyside are currently ranked amongst the cheapest in the country.

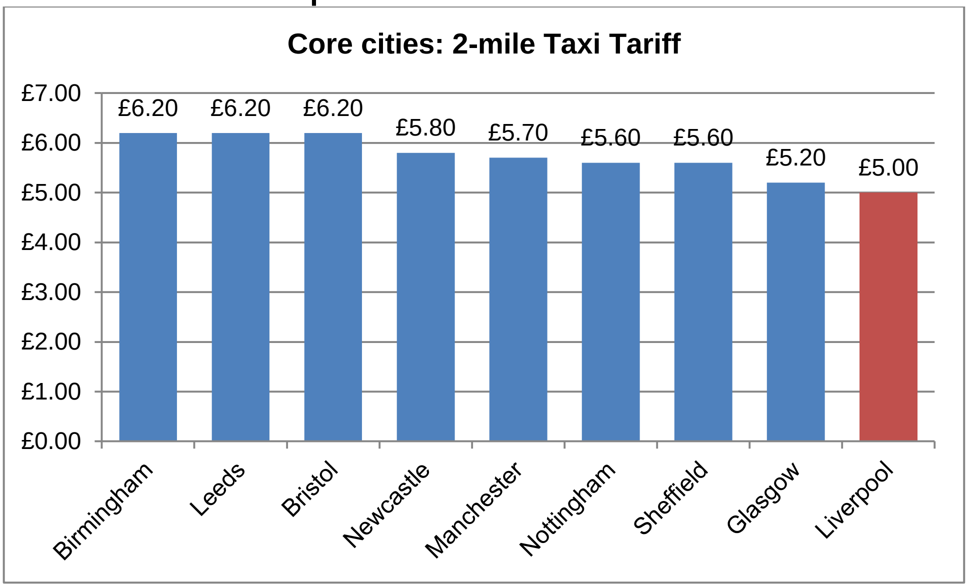
Taxi tariffs: 2 mile

District	Two mile fare	Ranked	
Halton	£5.20	271	Out of 363 local authorities
Warrington	£5.20	280	Out of 363 local authorities
Wirral	£5.20	281	Out of 363 local authorities
Liverpool	£5.00	301	Out of 363 local authorities
Sefton	£4.60	342	Out of 363 local authorities
Knowsley	£4.40	354	Out of 363 local authorities
St.Helens	£4.50	351	Out of 363 local authorities
National average	**£5.65**		

Source: Private Hire & Taxi Monthly, Feb 2015

This suggests that taxi tariffs are relatively low, with Sefton, Knowsley and St.Helens particularly noted for being in the lowest tier of charges. Overall on Merseyside, taxi tariffs are between 78% and 92% that of the national average (£5.65 per 2 miles).

Comparison with other core cities:



Source: Private Hire & Taxi Monthly, Feb 2015

Compared with other key cities across the UK, Liverpool itself still emerges as being relatively low – a tariff of £5.00 per 2 miles compared to £6.20 per 2 miles in Birmingham, Bristol and Leeds.

8 Other Comments

8.1 General point - the average annual income for disadvantaged areas is £14,500. Research from the Joseph Rowntree Foundation (JRF) in 2010 indicated that a typical family with two children needed to earn £29,200 per annum to reach a minimum socially acceptable standard of living in the UK. JRF also highlighted that costs for a minimum budget have risen by 38% over the decade to 2010 and income levels have not kept pace with this. Bus fares, which have increased by 59% over the decade to 2010 are attributed as having a major influence over this increase.

8.2 Looking at bus passengers' priorities for improvement, two of the items in the 'top 5' list for improvement relate directly to fares: "Bus fares, tickets and passes offer better value for money" (ranked 2nd) and "Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company" (ranked 4th). (*Source: Bus passenger priorities for improvement, Transport Focus – see appendix.)*

8.3 A common theme, apart from the actual cost of bus fares, is the lack of information on fares. Research by Transport Focus found that in metropolitan areas, the two key expectations of passengers at the bus stop that weren't met were 'real time information' and 'information on fares'. (*Source: Bus passenger priorities for improvement, Transport Focus – see appendix.)*

8.4 A 2010 report by PTEG indicated that low income families, who are more likely to be bus users, are disproportionately impacted on by increases in bus fares. (*Source: The effect of bus fare increases on low income families, PTEG*).

8.5 A cash fare of £2.10 on a bus is almost double the cost of a litre of unleaded petrol (£1.15 as at August 2015 – *Source: AA Fuel Price Reports*).

8.6 A 10p increase on a £2 bus fare represents is a 5% increase. This is roughly double the current rate of inflation.

8.7 A report by AECOM indicated that a 10% increase in bus fares would result in a 3.4% drop in demand for bus whereas the same percentage increase in train would prompt a 2.28% drop in rail demand – in part down to the perceived more attractive rail offer. In both cases the increase in fares indicated a rise in use of the car. (*Source: Review of Prepaid Ticketing Scheme 2010, Aecom for Merseytravel*).

Appendix A: Bus passengers' priorities for improvements

Source: Bus passenger priorities for improvement, Transport Focus, March 2010

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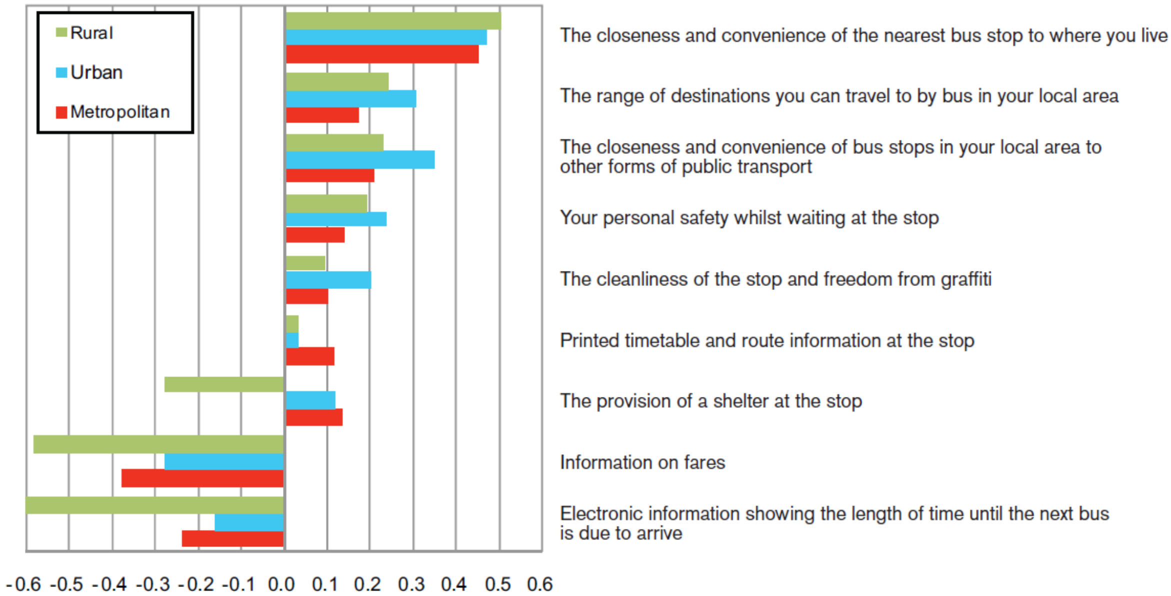
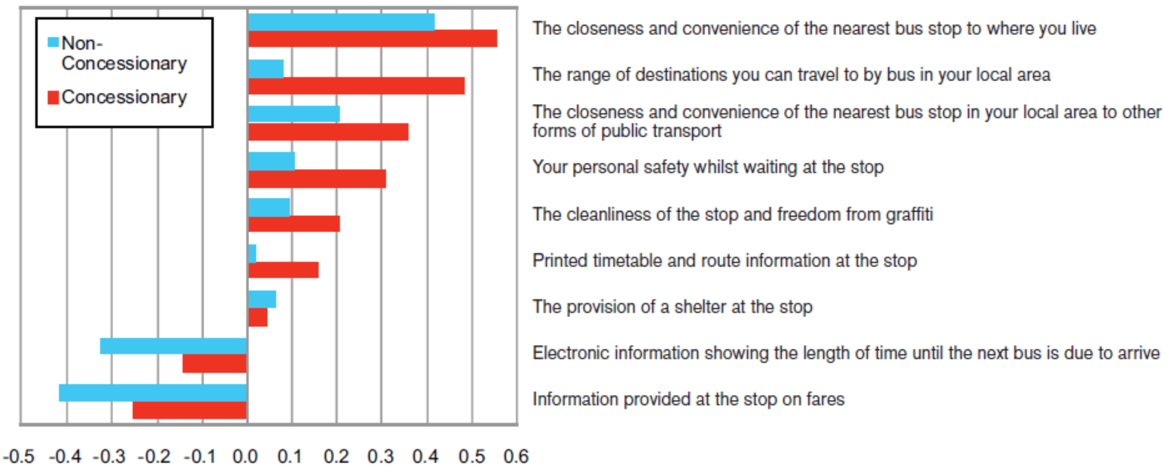
Passengers in metropolitan, urban and rural areas: bus stop attributes
(positive = reasonable expectations exceeded and negative = not being met)



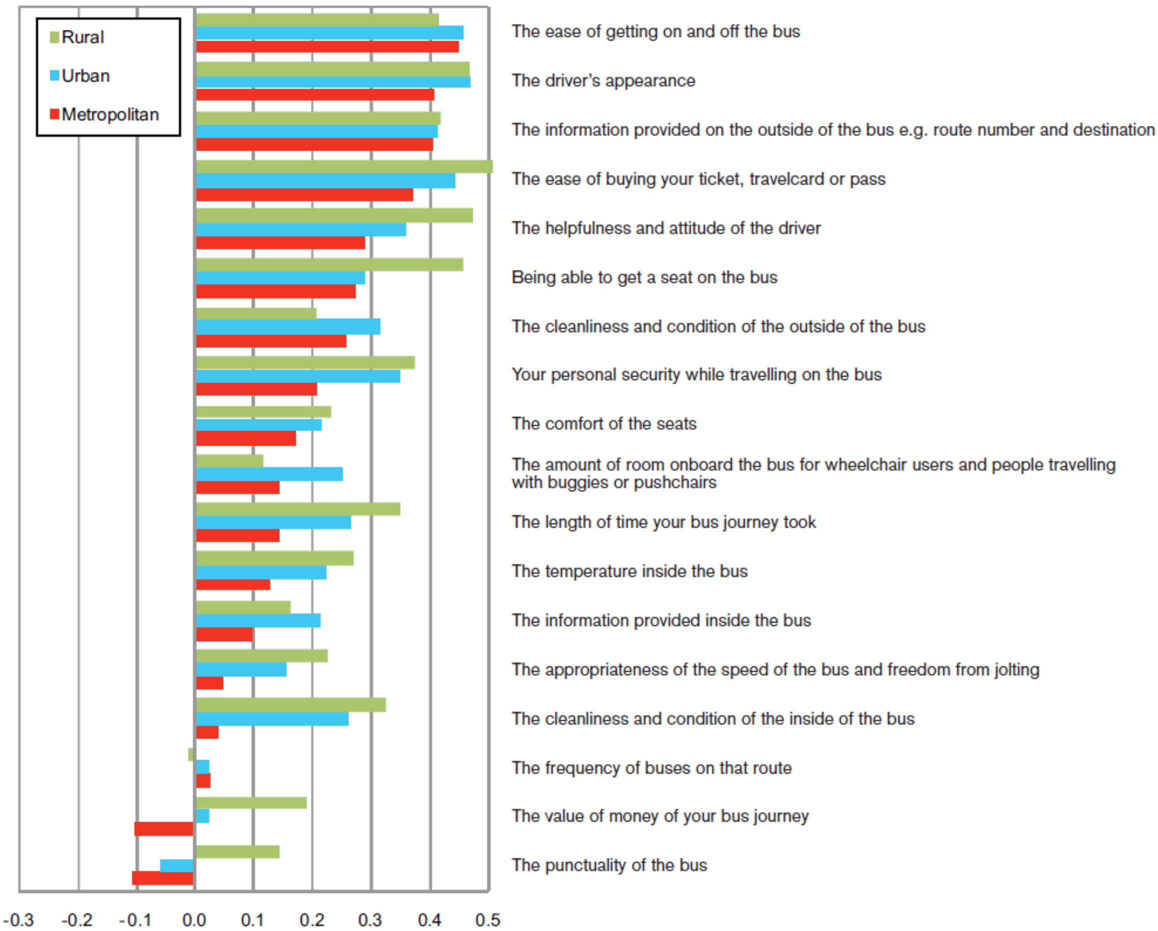
Note that at the bus stop, in urban and metropolitan areas, only two aspects stand out as not being met: real-time information and **information on fares**.

Both of these elements are even more likely to not be met if we focussed on non-concessionary pass holders.

Concessionary and non-concessionary passengers: bus stop attributes
(positive = reasonable expectations exceeded and negative = not being met)



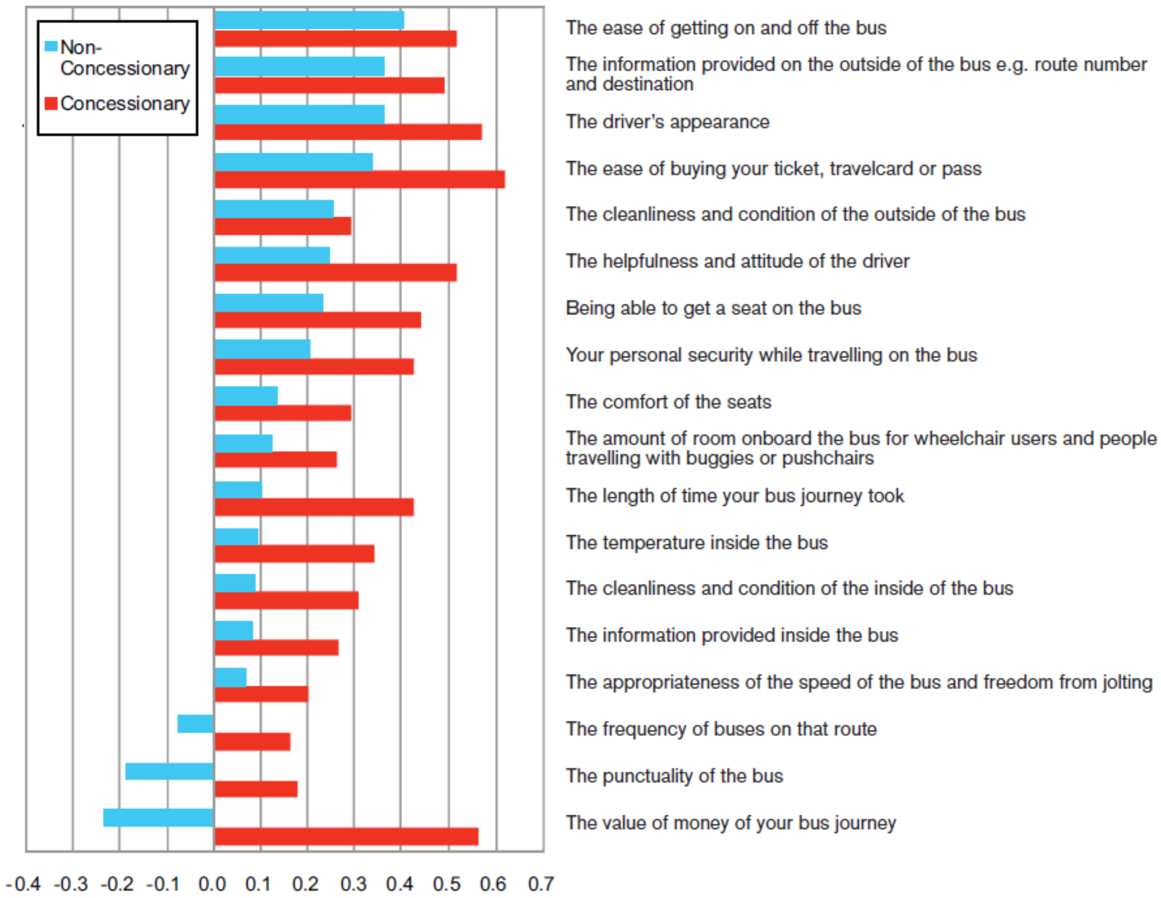
Passengers in metropolitan, urban and rural areas: bus journey attributes
(positive = reasonable expectations exceeded and negative = not being met)



Note that for the bus journey itself, in urban and metropolitan areas only two aspects stand out as not being met: punctuality and **value for money**.

Again, both of these elements are even more likely to not be met if we focussed on non-concessionary pass holders.

Concessionary and non-concessionary passengers: bus journey attributes
(positive = reasonable expectations exceeded and negative = not being met)



Concessionary and non-concessionary passengers

Improvement	Rank Non-Conc	Rank Conc
More buses are on time or within five minutes of when they are scheduled to arrive	1	1
Bus fares, tickets and passes offer better value for money	2	26
Buses run more frequently at times when you want to use the bus	3	9
Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company	4	18
All passengers are able to get a seat on the bus for the duration of their journey	5	3
Buses go to a wider range of destinations in your local area	6	8
Tickets and passes are available that entitle you to travel on all types of public transport in your local area, not just buses	7	13
All bus drivers are helpful and have a positive attitude	8	5
Electronic displays showing the correct length of time until the next bus is due to arrive are available at all bus stops	9	19
Personal security while waiting for the bus is improved through the use of CCTV cameras at all bus stops	10	16
Accurate timetable and route information is available at all bus stops	11	10
Personal security onboard the bus is improved through the use of CCTV cameras on all buses	12	17
Bus tickets, travelcards and passes can be purchased more easily and from a wider range of sources	13	30
All bus stops have a well-maintained shelter	14	2
The length of time your bus journey takes is reduced by five minutes	15	28
All buses have sufficient room for wheelchair users and people with a buggy or pushchair to travel in comfort without obstructing other passengers	16	14
All buses drive at an appropriate speed and are free from jolting	17	7
Bus stops are located closer and with easier access to where you live	18	22
The correct route number and destination is clearly displayed on the outside of all buses	19	6
Bus stops are located closer and with easier access to other forms of public transport e.g. rail stations	20	15
Information on fares is available at all bus stops	21	29
All bus stops are clean and free from graffiti	22	11
All buses have low floors and are easy to get on and off	23	4
The temperature inside the bus is regulated at all times of the year to ensure it is neither too hot nor too cold	24	20
The inside of the bus is clean and litter-free at all times of the day	25	12
Printed timetables, route information and other useful information is provided inside all buses	26	21
The seats onboard the bus are very comfortable	27	24
The name of the next bus stop is announced or displayed electronically on the bus during the journey	28	25
All bus drivers are smartly dressed and have a professional appearance	29	23
The outside of the bus is clean and in better condition	30	27

Looking at bus passengers' priorities for improvement – and here focussing on those not using concessionary passes – we see that in the top 5 items, two are connected to fares, explicitly:

- "**Bus fares, tickets and passes offer better value for money**" (ranked 2nd).
- "**Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company**" (ranked 4th).

The demand for "**Tickets and passes are available that entitle you to travel on all types of public transport in your local area, not just buses**" was ranked 7th.

The demand for "**Information on fares is available at bus stops**" was ranked 21st.

Appendix B: Transport Select Committee 2010 (key points)

Competition in the local bus market:
http://www.parliament.uk/business/committees/committees-a-z/commons-select/transport-committee/inquiries/parliament-2010/bus-comp/

A Evidence from Transport Focus

Passengers across England rate the availability of multi-operator tickets as a high priority; this is an even higher priority in metropolitan/urban areas.

There should be co-operation / consistency between neighbouring authorities (for example, in the case of someone whose nearest town centre actually lies in a different local authority. [An example in Merseyside is people might be people in Garswood travelling to Ashton in Makerfield, or in Eastham travelling to Chester].

Multi operator tickets are especially more important on routes where services in the evenings can be provided by a different operator, necessitating the purchase of two single tickets. [An example in Merseyside is the 464 (Arriva) / 164 (Avon) route to New Ferry.]

Passengers want:

- A product that enables them to catch the first bus that comes along.
- To be aware of above product.
- Understanding of the product’s terms and conditions.
- As easy to buy as the competing single-operator ticket.
- A cost that is fair, reflecting value to passenger (in terms of greater flexibility/convenience).

Transport Focus expresses particular concern that operators shouldn’t just be able to undermine multi-operator tickets with single-operator tickets – and notes that the Competition Commission suggested restrictions on pricing / issuing of multi-journey ticket where a similar product already existed. However Transport Focus was equally concerned that there shouldn’t be a disincentive for operators to reduce fares. Ultimately, much would depend on the motive behind an operator's actions – i.e., setting the cost a multi-operator ticket too high or lowering their fares to compete with a multi-operator ticket.

B. Competition Commission

The competition commission report into the bus market (http://www.competition-commission.org.uk/our-work/directory-of-all-inquiries/local-bus-services-market-investigation) found relatively high levels of profitability (based on Return on Capital Employed – an average of 13.5% across 2005/6 to 2009/10). Report is not clear as to whether this excess profit is reinvested to the benefit of passengers (i.e., fleet renewal, ticketing, infrastructure) or distributed to shareholders.

Notes that the Return on Capital Employed for operators in London (where routes are awarded on a competitive basis) tended to be lower than that achieved outside London.

C. Evidence from Stagecoach

Since 2005/6 has invested £500m on 4,000 new buses.

Claims to be Britain’s best value operator, with low cost weekly tickets – 17.5% cheaper than competitors.

Cites Transport Focus work, identifying reliability and punctuality as being the two issues of most importance to passengers.

Believes multi-operator tickets provide significant benefits but wary of prescriptive pricing formulae.

Believes that DfT should promote Quality Partnerships, local authorities and operators should concentrate on delivering them.

D. Evidence from Arriva

Arriva has a strategy of delivering its commercial objectives through growth via:

- Consistency at the bus stop
- A passenger focused culture
- Marketing investment
- Pricing
- Networking refreshing

Arriva conducts its own independent surveys of passengers; these show passenger’s preferences are for punctuality, frequency, cleanliness and value for money.

E. Evidence from Bus Users UK

Notes how fares are an issue to those on low incomes (and not entitled to concessionary travel); this can impact on people’s engagement in economic / education / health / social activities.

F. General points

Virtually all evidence has supported the Competition Commission recommendations to encourage more multi-operator ticketing.

Notes that some local authorities / PTEs have implemented multi-operator tickets; but that dominant bus companies rendered them unattractive by charging a premium / undercutting them with cheaper single-operator tickets.

Conclusions

> *"Wider provision of multi-operator ticketing is long overdue. The government must ensure that where the private sector does not deliver such a scheme voluntarily, the local transport authority has the powers to implement a viable scheme."*
>
> Recommends that the government / local transport authorities focus on raising standards and achieving a *"stable reliable and integrated service"*.

Appendix C: Summary of findings on Elasticity of Demand

Taken from Review of Prepaid Ticketing Scheme 2010; AECOM, for Merseytravel

Key Finding:

- Aecom noted in their 2010 report on prepaid ticketing, that bus demand will increase by 0.03% for every 1% rail fare increase whereas rail demand will increase twice as much for the same fare increase on bus. The principal they are arguing is that rail travel is seen to be more attractive than bus and hence bus passengers will be easier to entice onto rail services.

- Within the Aecom report they reference David Hensher's 'Bus Transport: Economics, Policy and Planning'; the following table highlights the direct elasticities in bold. For example a 10% increase in bus fares would result in a 3.4% drop in demand for bus whereas the same percentage increase in train would prompt a 2.28% drop in rail demand.

- It is noted in the table below that both for increasing rail and bus costs there can be an increase in car use.

Table 56 Elasticity of Demand with Respect to Fare or Travel Cost (Hensher – Bus Transport: Economics, Policy and Planning) – with Merseytravel equivalent ticket

	Train			**Bus**			**Car**
(Adjusted)	**Single (operator)**	**Weekly (Railpass)**	**TravelPass (BFT) (Trio)**	**Single (Operator)**	**Travel ten (Solo)**	**TravelPass (BF) (Trio)**	
Train Single (operator)	**−0.228**	0	0	+0.066	+0.010	0	*+0.217*
Weekly (Railpass)	0	**−0.167**	0	0	0	+0.003	*+0.141*
Travel pass (BFT) (Trio)	0	0	**−0.212**	0	+0.004	0	*+0.344*
Bus Single (operator)	+0.037	0	0	**−0.340**	+0.019	+0.008	*+0.212*
Travel ten (Solo)	+0.007	0	+0.001	+0.024	**−0.131**	+0.011	*+0.193*
Travel pass (BF) (Trio)	0	+0.009	0	+0.011	+0.012	**−0.097**	*+0.066*
Car	*+0.010*	*+0.030*	*+0.006*	*+0.018*	*+0.013*	*+0.004*	***−0.094***

***BFT** – bus, ferry & train, **BF** – bus & ferry*

Appendix D: Prepaid Ticket product prices

Stagecoach

Area	Daily	Weekly	4 weeks	13 weeks	Annual
Merseyside & Cheshire	£3.90	£13.50	£48.00	na	na
As above, plus Lancashire & Cumbria		£27.30	£98.00	na	na

Arriva

Area	Daily	Weekly	4 weeks	13 weeks	Annual
Liverpool, Knowsley, Sefton	£4.20	n/a	n/a	n/a	n/a
Merseyside	n/a	£16.00	£56.00	n/a	£560.00
Merseyside, Greater Manchester, Cheshire & Wrexham	£5.20	n/a	n/a	n/a	n/a
As above, plus North Wales	£5.50	£17.50	£61.50	n/a	£615.00

Merseytravel Saveaway

Area	Daily	Weekly	4 weeks	13 weeks	Annual
1 area (Wirral *or* St.Helens *or* Liverpool + Knowsley + Crosby *or* Sefton)	£3.90	n/a	n/a	n/a	n/a
Merseyside, Chester, Ellesmere Port & Ormskirk	£5.10	n/a	n/a	n/a	n/a

Merseytravel Trio

Area	Daily	Weekly	Monthly	13 weeks	Annual
1 area (or 2 Zones) (Wirral *or* St.Helens *or* Liverpool + Knowsley + Crosby *or* Sefton)	n/a	£21.90	77.50	n/a	£775.00
1 area + 1 zone (or 3 Zones) (i.e., Wirral to Liverpool City Centre *or* Southport to Bootle)	n/a	£28.00	£96.40	n/a	£964.00
All Merseyside	n/a	£36.30	£125.70	n/a	£1,257.00

Merseytravel Solo

Area	Daily	Weekly	Monthly	13 weeks	Annual
1 area (Wirral *or* St.Helens *or* Liverpool + Knowsley + Crosby *or* Sefton)	n/a	£18.00	£58.30	n/a	£631.00
All Merseyside	n/a	£25.90	£83.40	n/a	£903.00

Halton Transport

Area	Daily	Weekly	Monthly	13 weeks	Annual
1 area (Halton)	£3.80	£15.00	£61.00	n/a	n/a

Halton Transport have no prepaid tickets beyond a month duration.

Merseytravel Tickets; Source,Mersytravel.gov.uk , September 2015
Operator Tickets ,Source Oppeator websites 2015

Appendix E: Data tables

Table 1: Bus passenger journeys
Bus passenger journeys on local bus services (m)

	London[1]	English metropolitan areas[1]	Merseyside[2]	English non-metropolitan areas[1]
1997/98	1,281	1,292	177	1,286
1998/99	1,266	1,256	168	1,286
1999/00	1,294	1,213	170	1,297
2000/01	1,347	1,203	169	1,292
2001/02	1,422	1,196	171	1,263
2002/03	1,527	1,182	170	1,255
2003/04	1,692	1,162	166	1,233
2004/05	1,802	1,069	164	1,177
2005/06	1,881	1,070	163	1,184
2006/07	1,993	1,072	154	1,253
2007/08	2,160	1,098	148	1,297
2008/09	2,228	1,105	149	1,328
2009/10	2,238	1,085	143	1,313
2010/11	2,269	1,056	142	1,317
2011/12	2,324	1,027	137	1,313
2012/13	2,315	1,001	136	1,281
2013/14	2,384	1,015	137	1,303
2014/15	2,394	1,004	137	1,303

[1] *Source: Bus passenger journeys on local bus services, Transport Statistics Great Britain, DfT.*
[2] *Source: Merseytravel Annual Statistical Monitor*

Table 2: Volume of local journeys

	Bus (m)[1]	Rail (m)[1]	Vehicle km (m)[2]	Car km (m)[3]
1997/98	176.6	27.5	7,095	5,881
1998/99	168.5	29.4	7,185	5,932
1999/00	169.8	31.5	7,254	5,991
2000/01	169.2	32.1	7,343	6,055
2001/02	170.6	33.1	7,375	6,085
2002/03	169.5	32.1	7,593	6,265
2003/04	165.9	33.0	7,587	6,198
2004/05	164.3	34.1	7,651	6,229
2005/06	162.9	35.3	7,763	6,295
2006/07	153.8	37.0	7,780	6,295
2007/08	147.7	38.4	7,826	6,305
2008/09	148.7	39.1	7,824	6,318
2009/10	142.9	39.6	7,727	6,288
2010/11	141.6	39.8	7,564	6,123
2011/12	137.1	41.2	7,639	6,183
2012/13	136.2	39.0	7,574	6,135
2013/14	136.5	41.1	7,569	6,110
2014/15	136.7	41.9	7,732	6,210

[1] *Source: Merseytravel Annual Statistical Monitor*
[2] *Source: Motor vehicle traffic by Local Authority in Great Britain, DfT. (Note: Calendar, not financial year)*
[3] *Source: Car traffic by Local Authority in Great Britain, DfT. (Note: Calendar, not financial year)*

Table 3: Household income and car ownership

Household Income	Average car ownership levels: Rest of Merseyside	Deprived areas
Up to £5,000	0.27	0.14
Up to £7,500	0.28	0.21
Up to £10,000	0.68	0.32
Up to £12,500	0.85	0.34
Up to £15,000	0.88	0.70
Up to £20,000	0.97	0.88
Up to £25,000	1.27	1.11
Up to £30,000	1.47	1.46
Up to £35,000	1.59	1.30
Up to £40,000	1.63	1.33
Up to £45,000	2.00	1.00
Up to £50,000	1.79	2.00
Up to £55,000	2.00	2.00
Up to £60,000	2.33	-
Over £60,000	2.38	1.50

Source: Countywide Household Survey (CWS) 2010

Table 4: Household income and modal choice (national data)

Table NTS0705
Travel by household income quintile and main mode / mode: England, 2013

	Real household income quintile: Lowest real income level	Second level	Third level	Fourth level	Highest real income level	All income levels
Trips per person per year by main mode:						
Walk	253	190	193	189	187	203
Bicycle	12	17	14	15	14	14
Car / van driver	203	328	410	478	496	380
Car / van passenger	180	228	227	221	192	210
Other private transport[1]	7	13	10	10	10	10
Local and non-local buses	116	68	59	37	33	63
Rail[2]	20	20	22	27	61	30
Other public transport[3]	17	13	10	10	14	13
All modes	808	877	945	987	1,008	923
Distance (miles) per person per year by mode:						
Walk	216	169	181	170	199	187
Bicycle	28	43	48	60	70	49
Car / van driver	1,296	2,220	3,028	4,355	5,526	3,235
Car / van passenger	1,447	1,692	1,938	2,065	2,229	1,865
Other private transport[1]	78	147	223	160	164	154
Local and non-local buses	524	381	342	211	179	331
Rail[2]	391	384	506	617	1,427	650
Other public transport[3]	73	75	69	76	286	113
All modes	4,053	5,110	6,334	7,714	10,079	6,584
Unweighted sample size:						
individuals	3,398	3,361	3,243	3,287	2,903	16,192
trips ('000s)	50	54	56	60	54	274
stages ('000s)	56	58	61	65	62	302

Source: 2013 National Travel Survey, DfT.

Table 5: Gross Annual Wages (Median) Merseyside

	Residents in full-time employment		***Residents in part-time employment***	
	£ Wage	Change on previous year	£ Wage	Change on previous year
2007	22,317	3.4%	7,851	1.6%
2008	23,198	3.9%	8,121	3.4%
2009	23,435	1.0%	8,456	4.1%
2010	24,375	4.0%	8,327	-1.5%
2011	24,421	0.2%	8,437	1.3%
2012	24,647	0.9%	8,481	0.5%
2013	25,508	3.5%	8,726	2.9%
2014	25,572	0.3%	9,060	3.8%

Source: Annual Survey of Hours and Earnings, ONS

Table 6: Merseyside Working Age Population: Employment Patterns

	Working full time	Working part time	Self employed
Mar 2007	438,400	140,000	57,900
Jun 2007	435,000	142,700	59,800
Sep 2007	430,900	145,900	54,200
Dec 2007	429,500	152,000	53,500
Mar 2008	426,100	150,700	56,000
Jun 2008	422,800	151,100	55,200
Sep 2008	426,900	143,100	59,800
Dec 2008	425,000	141,100	57,300
Mar 2009	426,000	140,900	56,900
Jun 2009	430,400	141,200	59,100
Sep 2009	424,300	145,900	57,300
Dec 2009	426,200	141,100	58,400
Mar 2010	424,500	141,800	56,400
Jun 2010	425,300	144,800	57,000
Sep 2010	428,200	144,700	56,600
Dec 2010	424,100	149,700	56,700
Mar 2011	425,900	148,800	58,600
Jun 2011	423,700	151,000	59,200
Sep 2011	416,300	156,200	58,600
Dec 2011	412,400	159,200	57,800
Mar 2012	410,600	161,900	61,600
Jun 2012	415,300	157,900	61,200
Sep 2012	414,800	157,000	59,500
Dec 2012	422,600	156,200	60,000
Mar 2013	424,300	156,900	58,100
Jun 2013	422,500	159,300	58,800
Sep 2013	424,900	160,100	64,400
Dec 2013	427,100	156,600	66,800
Mar 2014	427,500	155,800	66,900
Jun 2014	425,200	144,300	63,500
Sep 2014	431,700	140,600	66,000
Dec 2014	428,500	138,300	63,800
Mar 2014	435,200	138,800	63,600

Source: Annual Population Survey, ONS

Table 7: Northwest England Part-time employees: factors behind being in part-time employment
People (000s)

	Could not find full-time job	Did not want full-time job
Dec 2011	143.3	555.9
Mar 2012	153.8	553.0
Jun 2012	162.8	556.4
Sep 2012	160.3	561.0
Dec 2012	166.8	556.8
Mar 2013	162.2	559.1
Jun 2013	154.1	568.9
Sep 2013	154.1	571.1
Dec 2013	152.0	566.2
Mar 2014	152.1	569.6
Jun 2014	154.5	554.9
Sep 2014	155.6	547.8
Dec 2014	158.2	545.9
Mar 2015	159.3	547.4

Source: Regional Labour Market Statistics, ONS

Although the above data is not available at a Merseyside level, this illustrates further the pressures on household budgets; much of the increase in part time employment coming from those who would have wanted a full-time job. For this group, the ticket products they may have used when in full-time employment may no longer be a 'match' for their current situation.

Table 8: Trends in public transport fares, motoring costs and the retail price index
Indexed values

	Retail Price Index[1]	Bus[2]	Merseyrail[3]	AA Motoring Costs[4]
2000	100.0	100.0	100.0	100.0
2001	101.8	103.3	106.1	102.1
2002	103.3	117.8	109.1	100.2
2003	106.5	124.6	112.1	110.1
2004	108.5	132.4	115.2	103.3
2005	112.6	144.6	118.2	111.3
2006	115.5	151.1	121.8	110.0
2007	120.8	160.8	126.1	109.6
2008	125.8	196.3	131.3	146.6
2009	124.3	216.0	138.8	114.0
2010	131.0	212.9	143.6	132.7
2011	137.8	212.2	143.6	134.9
2012	142.6	230.0	150.9	142.1
2013	146.7	252.2	159.4	140.7
2014	150.3	261.6	164.8	121.7
2015	151.7	255.5	168.5	129.6

[1] *Source: Consumer Price Inflation, ONS*
[2] *Source: Fares basket, major routes / Operators, Merseytravel (ammend figure for 2014)*
[3] *Source: Integrated transport*
[4] *Source: The AA running costs tables*

Table 9: Trends in public transport fares, motoring costs and the retail price index
Actual values

	Retail Price Index (Jan 1987 = 100)[1]	Bus average fare (pence)[2]	Merseyrail average fare (pence)[3]	AA Motoring Costs (pence per mile)[4]
2000	170.1	90.0	165.0	39.6
2001	173.1	93.0	175.0	40.4
2002	175.7	106.0	180.0	39.6
2003	181.2	112.1	185.0	43.6
2004	184.6	119.1	190.0	40.9
2005	191.6	130.1	195.0	44.1
2006	196.5	136.0	201.0	43.5
2007	205.4	144.7	208.0	43.3
2008	214.0	176.6	216.6	58.0
2009	211.5	194.4	229.0	45.1
2010	222.8	191.6	237.0	52.5
2011	234.4	191.0	237.0	53.4
2012	242.5	207.0	249.0	56.2
2013	249.5	227.0	263.0	55.7
2014	255.7	235.5	272.0	48.1
2015	258.0	229.9	278.0	51.3

[1] *Source: Consumer Price Inflation, ONS*
[2] *Source: Fares basket, major routes / Operators, Merseytravel (ammend figure for 2014)*
[3] *Source: Integrated transport*
[4] *Source: The AA running costs tables*

Table 10: Local bus fares
Indexed to 2005

	All items Retail Prices Index	London	English metropolitan areas	Merseyside
1995	77.4	71.1	61.8	
1996	79.5	74.3	65.2	59.2
1997	81.6	77.0	69.0	61.5
1998	84.4	80.0	72.6	66.1
1999	86.1	83.3	75.8	69.2
2000	88.4	83.2	79.1	69.2
2001	90.4	83.9	83.3	71.5
2002	91.6	81.5	87.3	81.5
2003	94.4	81.8	90.3	86.2
2004	96.9	86.9	94.7	91.6
2005	100.0	100.0	100.0	100.0
2006	102.4	105.7	111.9	104.5
2007	107.3	116.6	113.6	111.2
2008	111.3	111.2	121.6	135.8
2009	110.9	120.0	136.5	149.4
2010	115.9	135.2	137.6	147.3
2011	122.0	144.5	146.4	146.8
2012	126.4	152.3	156.2	159.1
2013	130.6	159.4	161.3	174.5
2014	133.8	164.3	165.3	181.0
2015	135.0	168.8	171.4	176.7

Source: Local bus fares index, DfT
Source: Merseytravel Annual Statistical Monitor (Ammended figure Merseyside 2014)
All values indexed to 2005 to match DfT source statistics

Table 11: Bus Journeys by payment method
Passenger journeys

	Cash fares	Operator Prepaid Tickets	Merseytravel prepaid tickets	***Saveaways***	***Trios***	***Solos***	***My Ticket***
1994/95	98,186,841	10,367,522	26,283,521	*8,883,543*	*7,682,661*	*9,717,317*	
1995/96	96,155,927	11,702,590	26,012,323	*10,142,530*	*6,612,550*	*9,257,243*	
1996/97	86,639,429	9,419,903	21,489,814	*7,948,564*	*6,583,718*	*6,957,532*	
1997/98	87,568,191	8,863,374	18,886,790	*5,498,232*	*6,977,382*	*6,411,176*	
1998/99	81,615,367	9,245,756	18,166,035	*4,577,838*	*7,111,365*	*6,476,832*	
1999/00	79,916,031	10,357,814	20,365,798	*4,525,169*	*8,611,426*	*7,229,203*	
2000/01	78,774,634	7,695,981	25,004,666	*8,225,289*	*7,280,680*	*9,498,697*	
2001/02	78,157,216	5,737,556	32,409,216	*13,288,853*	*6,008,941*	*13,111,422*	
2002/03	76,710,751	7,705,906	32,411,999	*11,128,337*	*6,039,508*	*15,244,154*	
2003/04	69,853,616	11,735,096	31,451,425	*10,127,372*	*6,103,156*	*15,220,897*	
2004/05	66,853,745	13,318,943	31,575,962	*9,483,927*	*6,350,662*	*15,741,373*	
2005/06	63,657,279	16,767,622	31,213,177	*9,278,861*	*6,479,859*	*15,454,457*	
2006/07	52,704,445	24,373,481	27,720,041	*9,049,472*	*6,151,728*	*12,518,841*	
2007/08	47,258,143	28,106,455	24,543,916	*7,182,135*	*5,618,771*	*11,743,010*	
2008/09	43,120,198	32,166,202	22,806,165	*5,801,142*	*5,385,554*	*11,619,469*	
2009/10	39,315,626	32,255,088	22,197,861	*6,385,734*	*5,034,099*	*10,778,028*	
2010/11	37,490,837	34,406,175	22,730,729	*6,278,727*	*5,297,409*	*11,154,593*	
2011/12	33,526,730	34,193,651	21,955,946	*6,776,068*	*5,066,023*	*10,113,855*	
2012/13	30,132,827	36,121,088	23,328,633	*8,229,265*	*4,975,041*	*10,124,327*	
2013/14	25,337,299	40,277,354	23,826,400	*8,165,884*	*5,107,668*	*10,552,848*	
2014/15	22,993,116	42,143,592	24,065,959	*6,270,858*	*4,822,288*	*9,980,360*	*2,992,453*

Source: Operator Print, Data & Analysis, Finance, Merseytravel
Note: Excludes concessionary travel

Appendix F: “Short Hop” Fare details

Operator	Standard Single Ticket:	Short Hop Single Ticket:
Network Warrington	Adult prices range from £1.60 to £4.20 for longer journeys.	n/a
Nottingham City Transport	£2 (adult)	A single journey within a fare stage £1.10 (Adult)
National Express West Midlands	Single journey on-bus cash fares are based upon 'fare stages'. Each bus route is split into a number of fare stages, with each fare stage usually containing about 3 bus stops. Standard Single (Stage 3+) £2.20 (Adult)	Stage 1-2 (Short Hop) City Hop. Single journey wholly within the Middle Ring Road in Birmingham £1.90 (Adult)
First Leeds	£2.30 (Adult) For Longer journeys between Leeds City Centre and the Metropolitan boundary. £2.80 (Adult) Journeys from the city centre to the Leeds Metropolitan boundary or across the city or across the Leeds Metropolitan boundary and into Bradford. Note some longer journeys from Leeds to Halifax and Skipton may be higher.	Standard Single £1.30 (Adult) Typically 4 stops within or across the Leeds Metropolitan Boundary (please note on a few routes it may be 3 or even 6 stops).
Cardiff Bus	They have 2 fare zones, Cardiff (including Penarth) and Barry. Standard Single: £1.80 (Adult) Cardiff Fare Zone Standard Single: £1.70 (Adult) Barry Fare Zone Standard Single: £2.50 (Adult) Both Fare Zones	Fares are available at £1 adult or 70p young persons for any single journey in the short hop boundary in the designated “short hop zones” • city centre, • Canton, • Roath, • Llanrumney • & St. Mellons. Short hop fares are only valid for a single journey within each of the short hop areas and are not transferable from one designated short hop area to another.
First Glasgow SimpliCITY	Single Fares Longer Hop (travel across city) £2 (Adult)	Short Hop A £1.20 short hop fare typically applies to journeys of approximately 5 stops or less. Single fares for trips outside the city are based on distance.

Operator	Standard Single Ticket:	Short Hop Single Ticket:
First South Yorkshire	Single fares in Sheffield range between £1 and £2.30	A special 50p fare is available for short journeys around Sheffield City Centre.
Go North East	Newcastle £1.50 (1 zone) £2.10 (2 zones)	n/a
Lothian Buses Edinburgh	SINGLEticket Adult: £1.50	n/a
Brighton & Hove Buses	There's a standard single journey fare of £2.40 throughout the Brighton and Hove conurbation, stretching from Shoreham in the west to Falmer and Saltdean in the east.	Short Hops: Short hop fares are available throughout the city for £1.80. Centre Fare: There is a central zone flat fare of £2.
Transport for London	Oyster & Contactless Pay As You Go £1.50	n/a

Source: Operator Websites 2015

Appendix G: Sampled fare tables from the Merseyside districts

Sampled Bus Routes in Different Areas

Sefton

To and From Southport

	Sample Route 1		Sample Route 2		Sample Route 3		Sample Route 4	
Miles	To	From	To	From	To	From	To	From
1	220	220	220	220	220	220	220	220
2	220	250	220	220	220	220	220	220
3	250	250	250	250	220	220	220	220
4	250	250	250	250	280	250	220	220
5	250	250	250	250	280	250	220	220
6	250	250	250	250	280	280	220	220
7	-	250	250	280	280	280	300	220
8	-	250	280	280	280	280	300	220
9	-	250	280	280	280	280	300	-
10	-	280	280	280	280	280	300	-
11	-	280	280	280	300	280	300	-
12	-	280	280	280	300	280	300	-

St Helens

To St Helens Fom Liverpool

	Sample Route 1		Sample Route 2	
Miles	To	From	To	From
1	220	220	200	200
2	220	220	200	200
3	220	250	200	230
4	220	250	200	230
5	220	280	200	230
6	220	280	200	230
7	220	280	200	280
8	220	280	230	300
9	280	300	230	300
10	280	300	230	300
11	300	300	280	300
12	300	300	300	300

Wirral

Wirral (excluding cross river services)

	Sample Route 1		Sample Route 2		Sample Route 3		Sample Route 4	
Miles	To	From	To	From	To	From	To	From
1	200	140	220	250	200	200	200	200
2	250	180	220	250	200	200	200	230
3	250	200	220	270	200	220	230	230
4	280	250	220	270	200	220	250	250
5	280	280	250	280	220	230	250	250
6	280	280	250	280	220	280	250	250
7	330	330	280	280	270	280	250	250
8			280	280	280	280	270	310
9			280	280	280	280	270	310
10			280	280	280	280	270	310
11			280	280	280	280	310	310
12			280	280	280	280	310	310

Knowsley

To / From Hyuton & To / From Kirkby

	Sample Route 1		Sample Route 2	
Miles	To	From	To	From
1	220	200	200	200
2	230	200	200	200
3	230	200	200	200
4	230	200	200	200
5	250	200	200	200
6	250	200	200	200
7	250	200	200	200
8	250	200	200	200
9	250	200	200	200
10	250	200	200	200
11	250	200	200	200
12	250	200	200	200

Halton

Within Halton Only

	Sample Route 1		Sample Route 2	
Miles	To	From	To	From
1	220	220	200	200
2	220	220	200	200
3	220	250	200	230
4	220	250	200	230
5	220	280	200	230
6	220	280	200	230
7	220	280	200	280
8	220	280	230	300
9	280	300	230	300
10	280	300	230	300
11	300	300	280	300
12	300	300	300	300

Fares are in pence

Source : Opperator fare tables 2014

Appendix H: Main Operators

Main Bus Operators in PTE Areas	Market Share %
Merseyside	
Arriva	54.5
Stagecoach	19.6
Huyton Travel	6.0
Greater Manchester	
First	38.2
Stagecoach	37.0
Arriva	5.0
South Yorkshire	
First	49.8
Stagecoach	35.8
Wellglade	5.5
West Midlands	
National Express	75.5
Rotala	8.4
Arriva	4.4
West Yorkshire	
First	57.6
Arriva	23.7
Transdev	5.4
Tyne and Wear	
Go Ahead Group	50.6
Stagecoach	39.3
Arriva	7.7

Main Bus Operators in Unitary Authorities	Market Share %
Halton	
Arriva	55.6
Halton Transport	35.3
Ashcroft Travel	2.4
Warrington	
Network Warrington	79.8
Arriva	10.2
Fairbrothers Coaches	4.6

Source; DfT Bus Statistics
https://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics
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