



West  
Yorkshire  
Combined  
Authority

Tracy  
Brabin  
Mayor of  
West Yorkshire

# Mayor's Fares On-Line Panel Survey October 2023 Results



# Background

The Combined Authority commissioned an on-line panel survey to gain some insight into West Yorkshire Residents' use and perceptions of the £2 single and £4.50 fare caps (Mayor's Fares) that were introduced on 04 September 2022.

The survey was conducted from 12 to 24 October 2023 to represent one year on from the launch and 1,028 responses were received from residents aged 19 to 65.

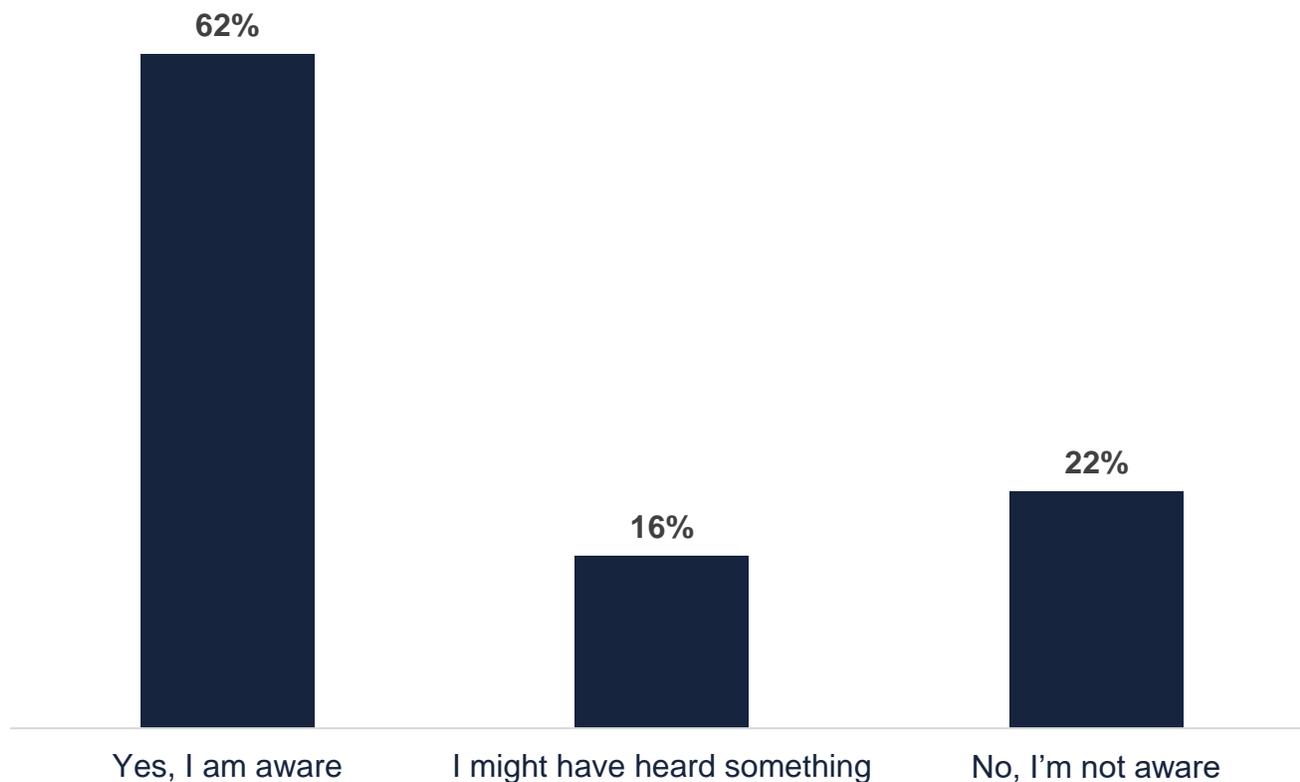
The age range 19 to 65 was chosen to encompass the target audience for turn-up-and-go Adult fares.

Mayor's Fares - On-Line Panel Survey - October 2023 Results



# Awareness: 62% said they were aware of Mayor's Fares, and a further 16% might have heard something about them

**Awareness:** Are you aware of Mayor's Fares  
(a £2 fare cap for single journeys and £4.50 for the day)?

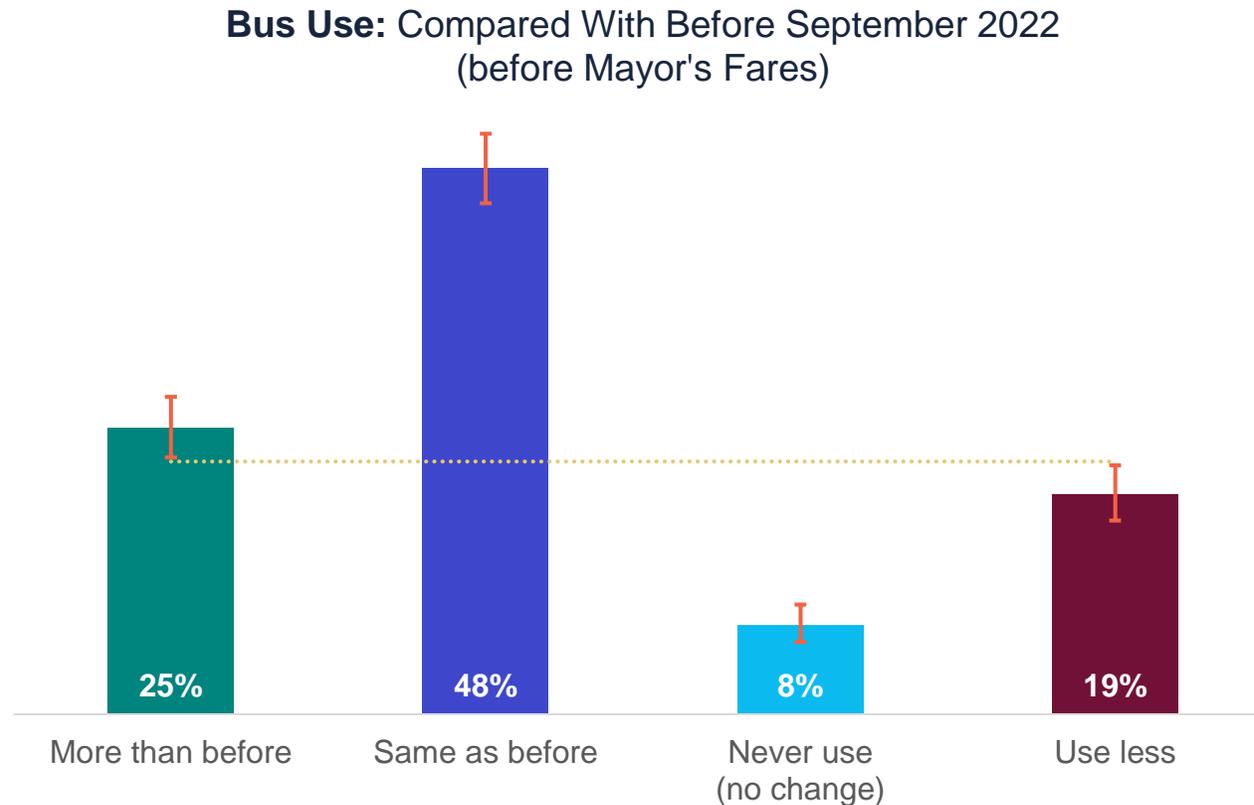


Frequency of bus use	Awareness of Mayors fares
Regular users at least once a week	<b>78%</b>
Occasional users less than once a week but at least every 2 or 3 months	<b>63%</b>
Non-users either never uses or uses very rarely	<b>36%</b>

Q: Are you aware of Mayor's Fares (a £2 fare cap for single journeys and £4.50 for the day)? Weighted Base: All Respondents: 1028 weighted

# Bus use: 25% of respondents are using buses more than before Mayor's Fares, with an overall net gain in bus use

- The difference between the share of respondents reporting increased use vs decreased bus use is small but statistically significant\*.



Q: How often do you use buses in West Yorkshire? Q: Compared to before September 2022, are you using buses in West Yorkshire [same, more or less]? Weighted Base: All Respondents: 1028 weighted.

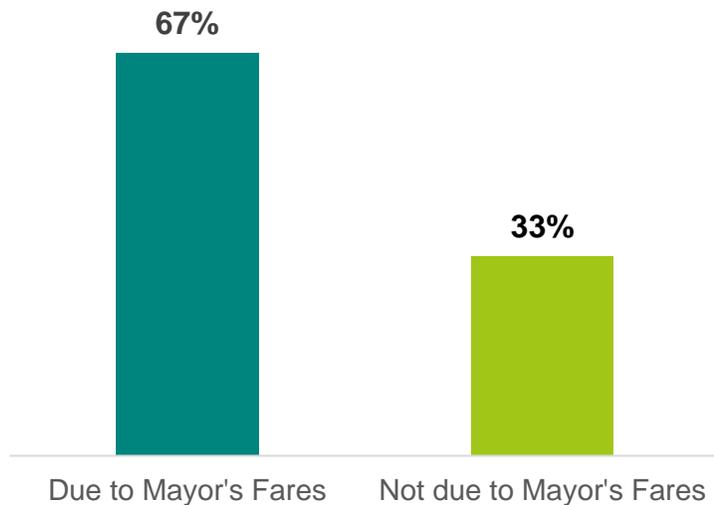
\*significant refers to statistical significance at the 95% level using the Wilson Score method

# Mayors Fares & Bus Use: Of those who said they were using bus more often, two-thirds said this was due to Mayor's Fares

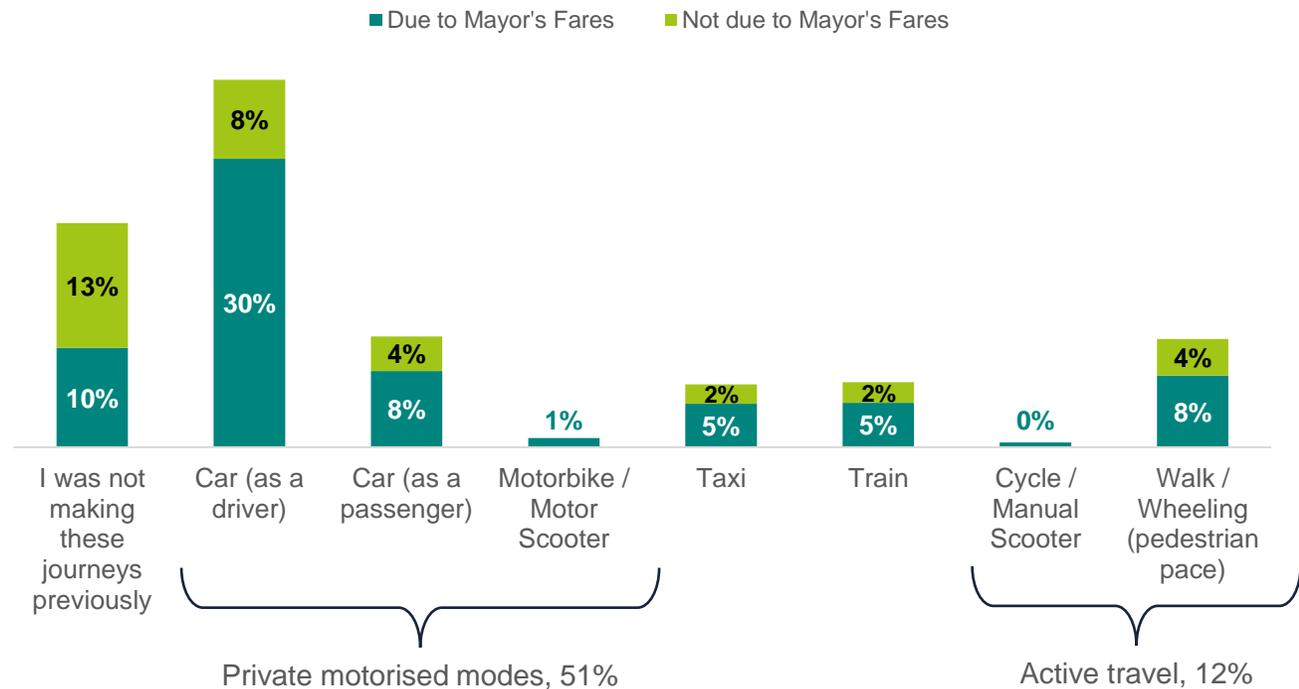


- Of **25%** of overall sample who said they were using the buses more, **67%** said this was due to Mayor's Fares
- Half of respondents who now use the bus more often have shifted from using private motorised modes

Bus use: more often



Main Way These Journeys Were Made Previously (% of users)



Q: You have said you are using the bus more often, is this due to Mayor's fares? Weighted Base: 258

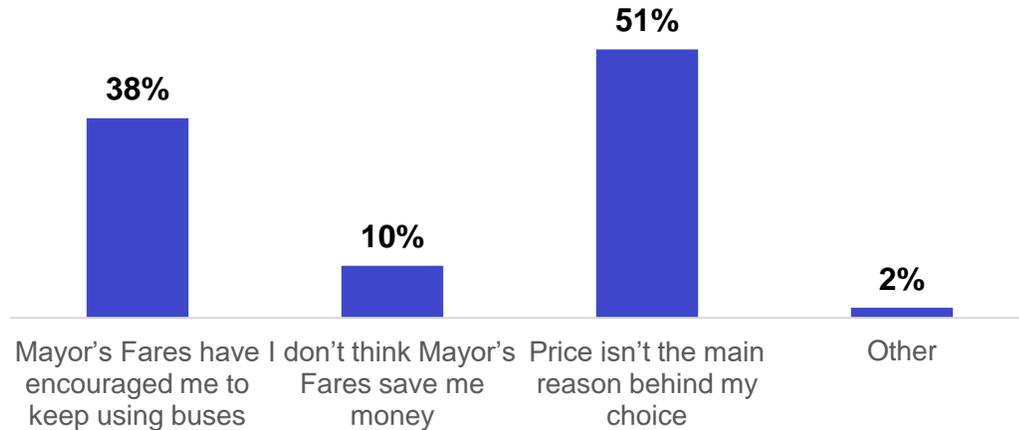
Q: You have said you are using the bus more, which was the main way you made these extra bus journeys previously? [Single select] Weighted Base: 258

# Mayors Fares & Bus Use: 38% those who use the bus the same amount as before Mayors Fares said that it has encouraged them to keep using buses

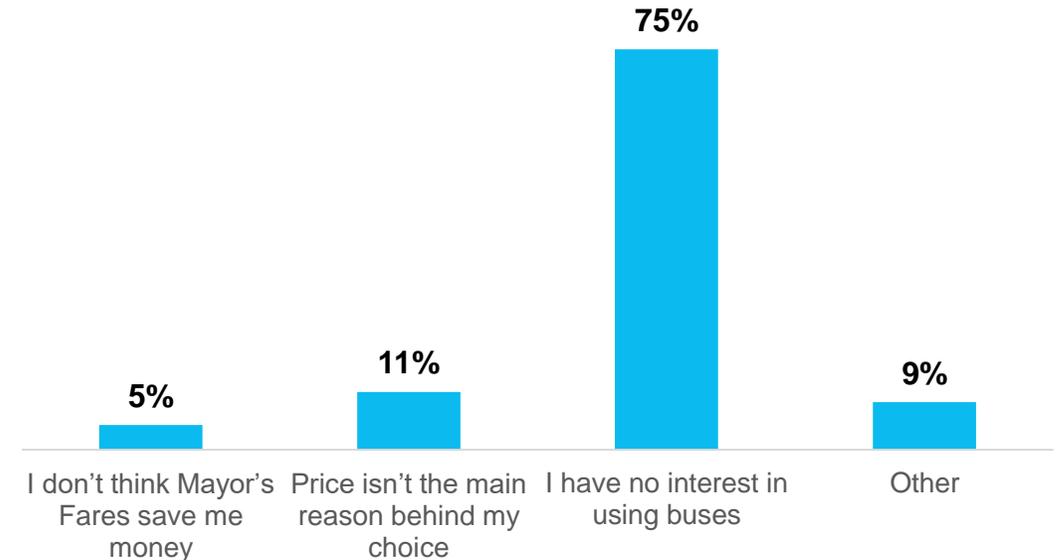


- 48%** of the overall sample said they were using buses the same now about as before Mayors Fares. Out of this group **38%** said that Mayor’s Fares have encouraged them to keep using buses, while over half said that price isn’t the main reason behind their choice.
- 8%** of the overall sample said they never use the bus. Of this group, the majority (**75%**) said they have no interest in using buses (equivalent to **6%** of all respondents).

Bus use: same as before



Bus use: Same amount (never use)



Q: You have said that you use the bus the same amount as now as before Mayor’s Fares, which of the following statements best reflects your view.  
 Weighted Base 572, of which 492 use rarely, occasionally or regularly, and 80 never use

# Mayors Fares & Bus Use: Change in study or work, personal circumstances, or health account for over half of respondents who use buses less often

More than before, 25%

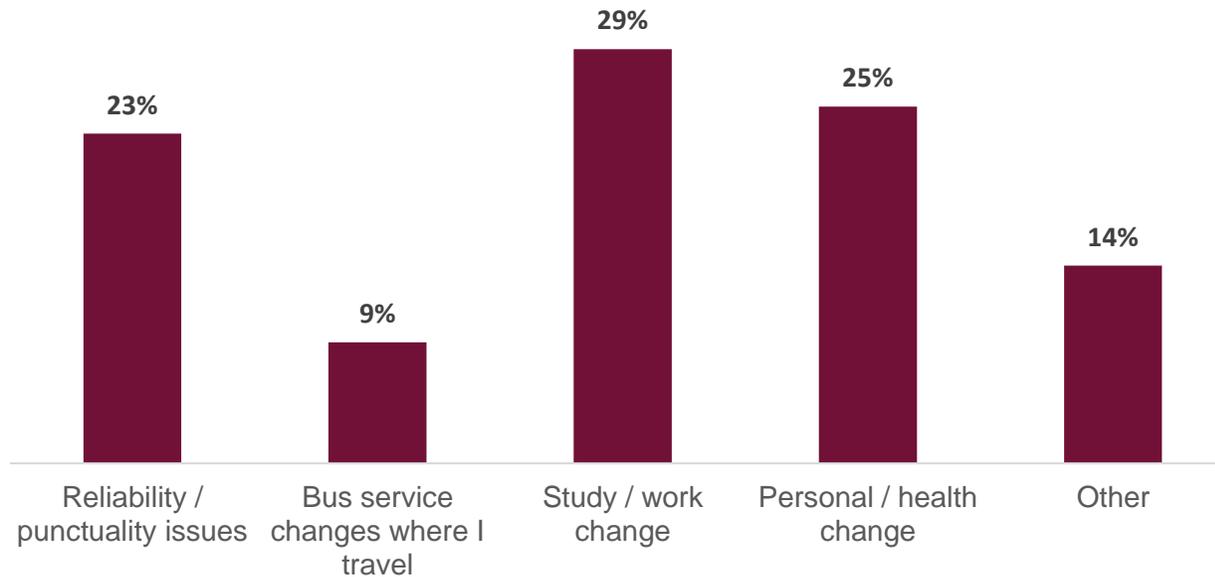
Same as before, 48%

Never use (no change), 8%

Use less, 19%

- Four pre-coded options were designed to elicit motivation for reduced bus use. Service issues account for **32%** of respondents using buses less. Changes to work, study, personal circumstances, or health make up **54%** of respondents.
- The remaining **14%** use the bus less for other reasons, including nearly **10%** who show an outcome of increase in car use, but not the motivation behind it.

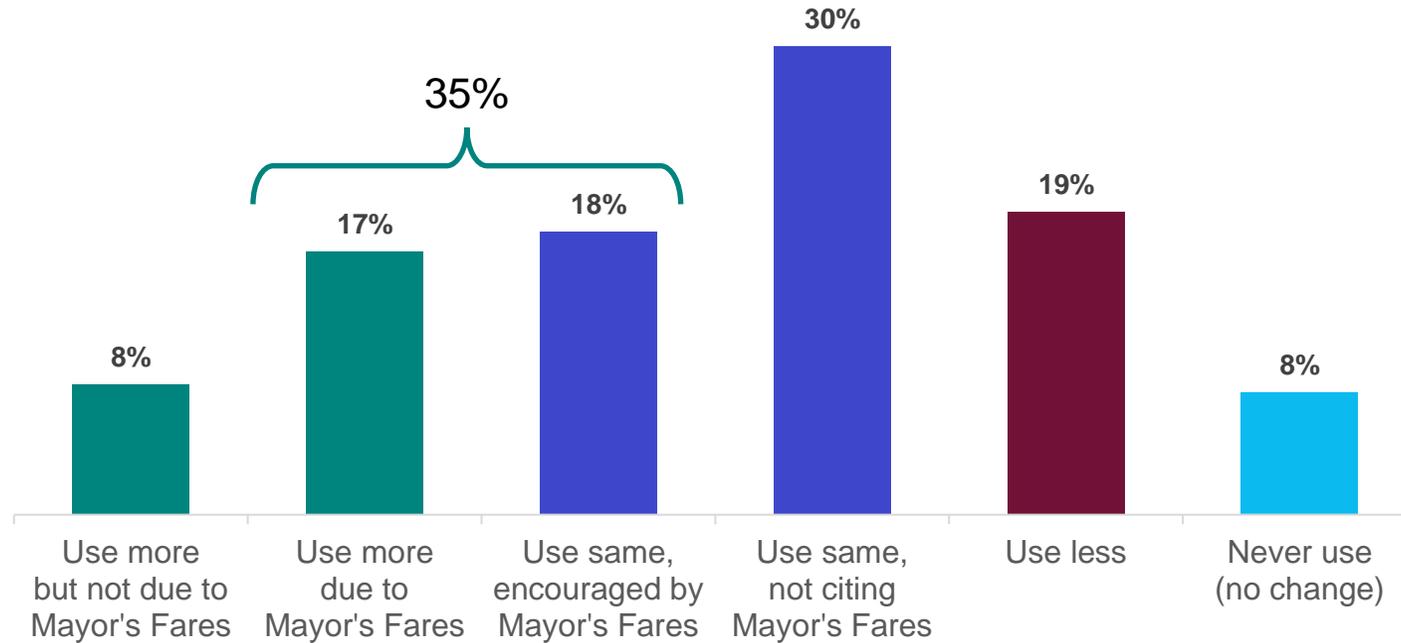
## Bus use: less often



Q: You have said you are using the bus less often, can you explain why? [Single select] Weighted Base: 198 (raw base 215)

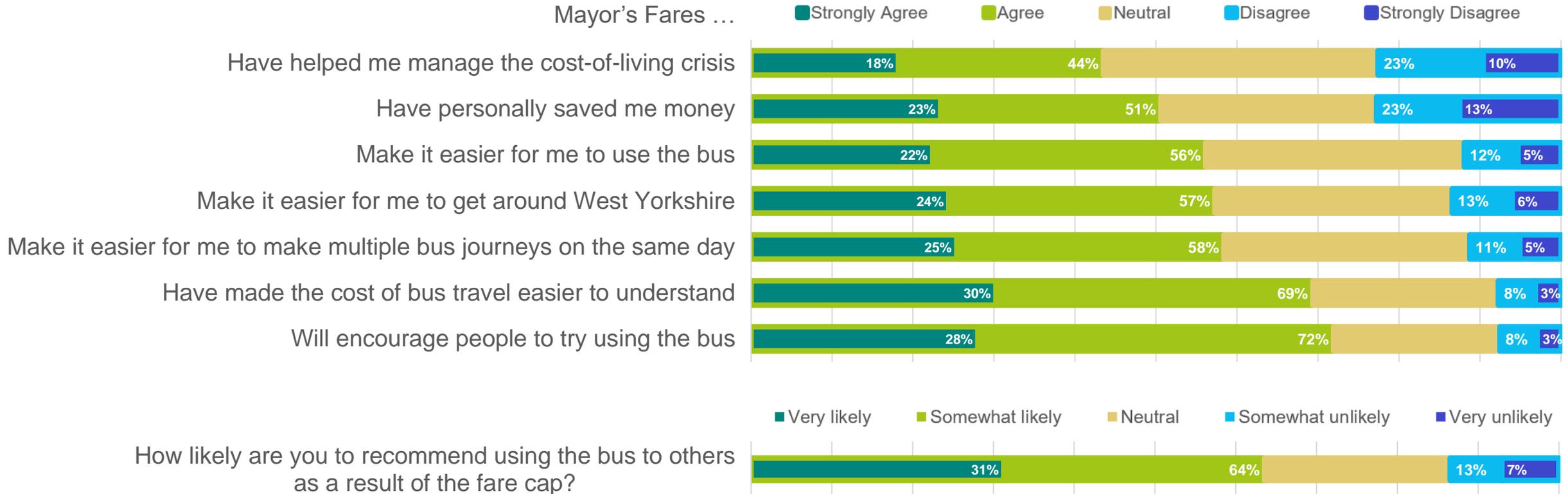
# Mayors Fares & Bus Use: 35% of respondents are either using buses more or are encouraged to keep using buses due to Mayor's Fares

Bus Use: Now Compared with Before September 2022 and Influence of Mayor's Fares



Q: How often do you use buses in West Yorkshire? Q: Compared to before September 2022, are you using buses in West Yorkshire [same, more or less]? Q: You have said you are using the bus more often, is this due to Mayor's fares? Q: You have said that you use the bus the same amount as now as before Mayor's Fares, which of the following statements best reflects your view. Weighted Base: All Respondents: 1028 weighted

# Mayors Fares Impact: 72% agreed that Mayor's Fares will encourage people to try using the bus and 69% said Mayors Fares had made the cost of bus travel easier to understand



Q: How much do you agree or disagree with the following statements about the Mayor's Fares?

Q: Overall, how likely are you to recommend using the bus to others as a result of the fare cap?

Weighted Base: All Respondents: 1028 weighted



## Further Detail and Comparisons

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# Method and Caveats

In this section Mayor's Fares may be shortened to MF.

Where the phrases 'occasional bus user', 'regular bus user' or 'non-bus user' are mentioned these follow the definitions described in West Yorkshire Bus Service Improvement Plan (BSIP)

Regular - at least once a week

Occasional - less than once a week but at least every 3 months

Non-User - either never uses or uses very rarely.

Throughout this report, the use of the term significantly, or significant refers to statistical significance at the 95% level using the Wilson Score method <sup>1,2</sup>.

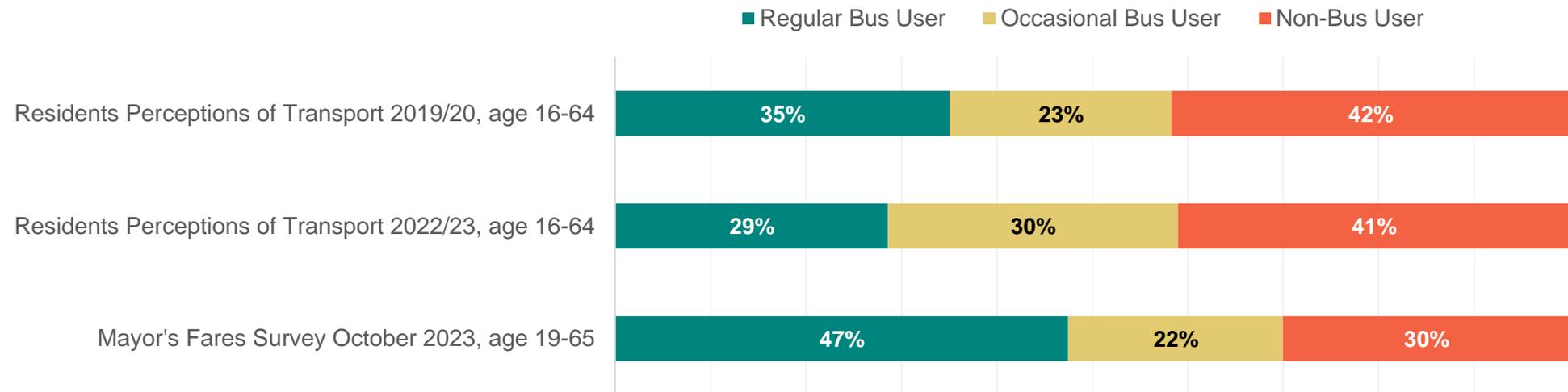
<sup>1</sup> Wilson EB. *Probable inference, the law of succession, and statistical inference*. *J Am Stat Assoc* 1927; 22: 209–12.

<sup>2</sup> Newcombe RG, Altman DG. *Proportions and their differences*. In Altman DG et al. (eds). *Statistics with confidence* (2nd edn). London: BMJ Books; 2000: 46–8.

# Respondents Reached: The Mayor's Fares survey includes a significantly higher percentage of regular bus users than the annual perceptions of transport survey.

The Mayor's Fares survey includes a significantly higher percentage of regular bus users than the annual perceptions of transport survey (47% of respondents were regular bus users compared with 29% in the latest annual West Yorkshire Residents Perceptions of Transport survey, or 35% pre-COVID for a similar age cohort). The Mayor's Fares survey also includes significantly fewer occasional bus users and non-bus users.

The Mayor's Fares on-line panel survey relied entirely from members of the public who had previously signed up to an independent panel and the research company Toluna invited panel members to take part. The West Yorkshire Residents Perceptions of Transport survey previously was 100% telephone based, and in the latest wave used a mixed method of telephone and on-line panel with the survey company using telephone interviews to reach demographic groups who were under-represented by the on-line responses and vice-versa.

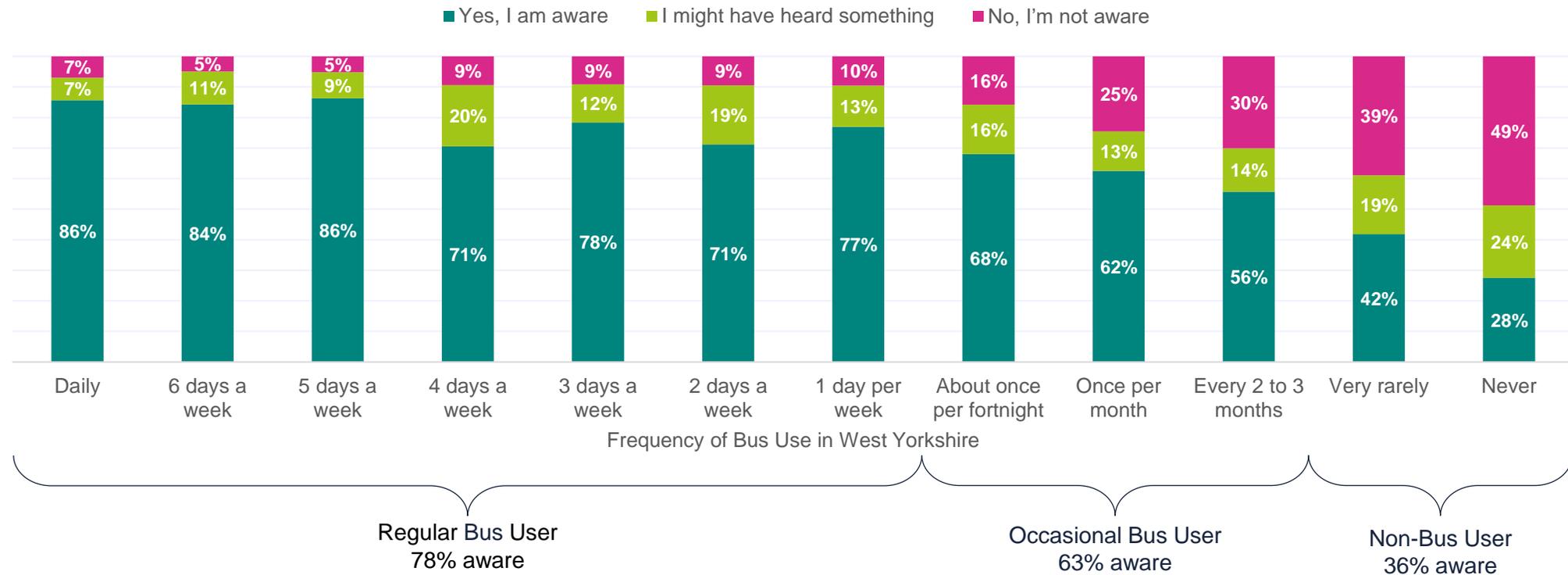


Q: How often do you use buses in West Yorkshire? Weighted Bases: Mayor's Fares - 1028; Residents Perceptions of Transport 2022/23, age 16-64 - 1412 ; Residents Perceptions of Transport 2019/20, age 16-64 - 1446.

# 78% of regular bus users aware of Mayor's Fares.

78% of regular bus users are aware of Mayor's Fares. This is a significantly higher level of awareness than the 63% of occasional bus users who are aware, which is in turn significantly higher awareness than non-bus users of whom only 36% are aware.

Awareness of Mayor's Fares

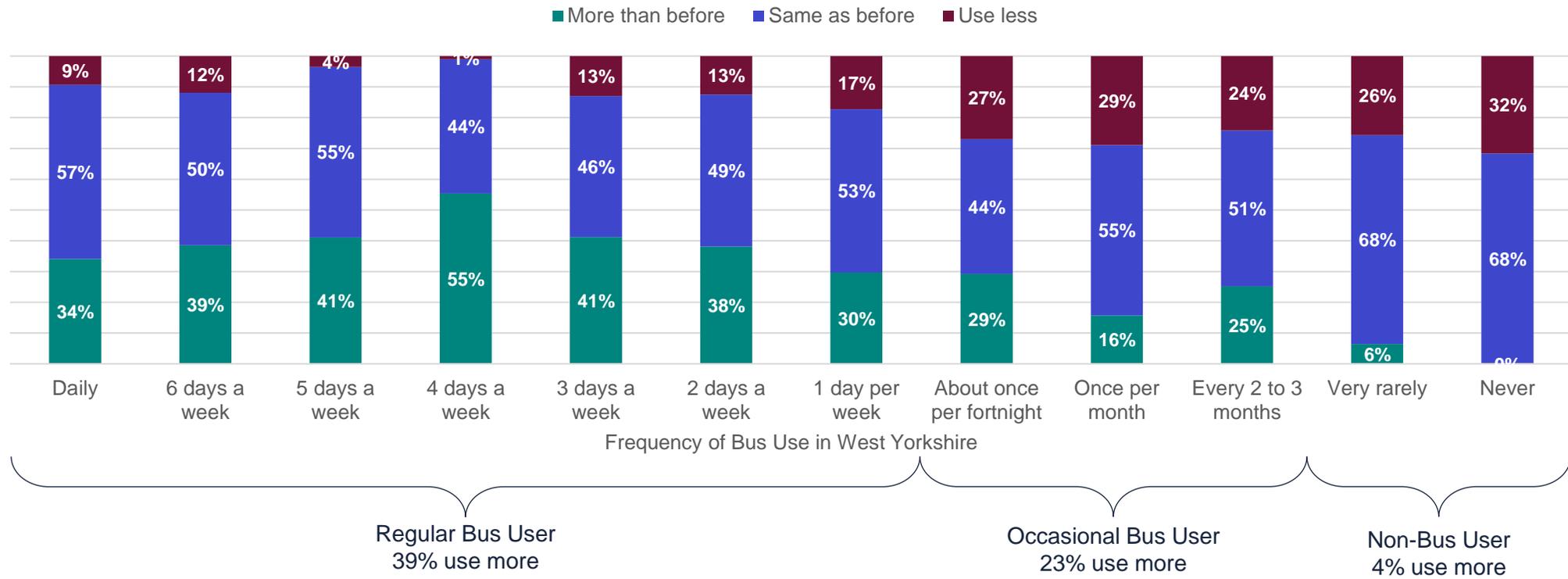


Q: Are you aware of Mayor's Fares (a £2 fare cap for single journeys and £4.50 for the day)? Q: How often do you use buses in West Yorkshire?  
Weighted Base: All Respondents: 1028 weighted.

# Regular users are significantly more likely to have increased their bus use than occasional users.

Compared to before September 2022, **39%** of regular bus users have increased their bus use as against **23%** of occasional users. It appears respondents who use the bus 4 days a week are the most likely to have increased their use, with **55%** of respondents saying so, though the difference is only significant when compared to respondents who use the bus 1 day per week or less.

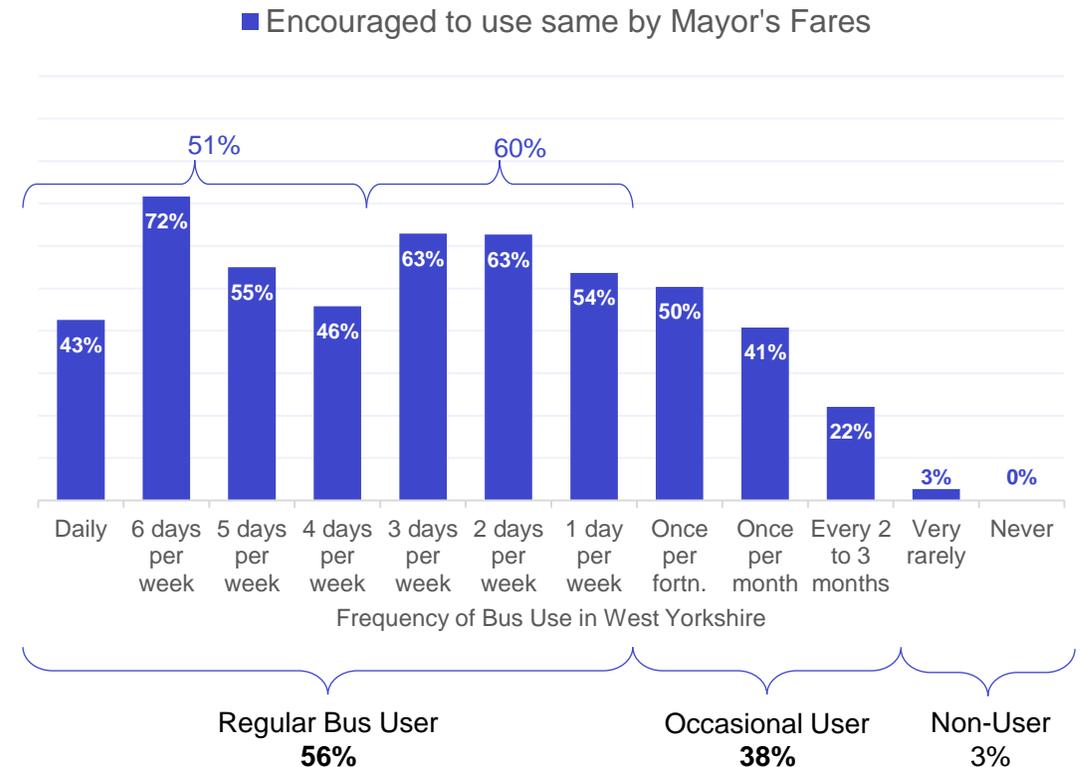
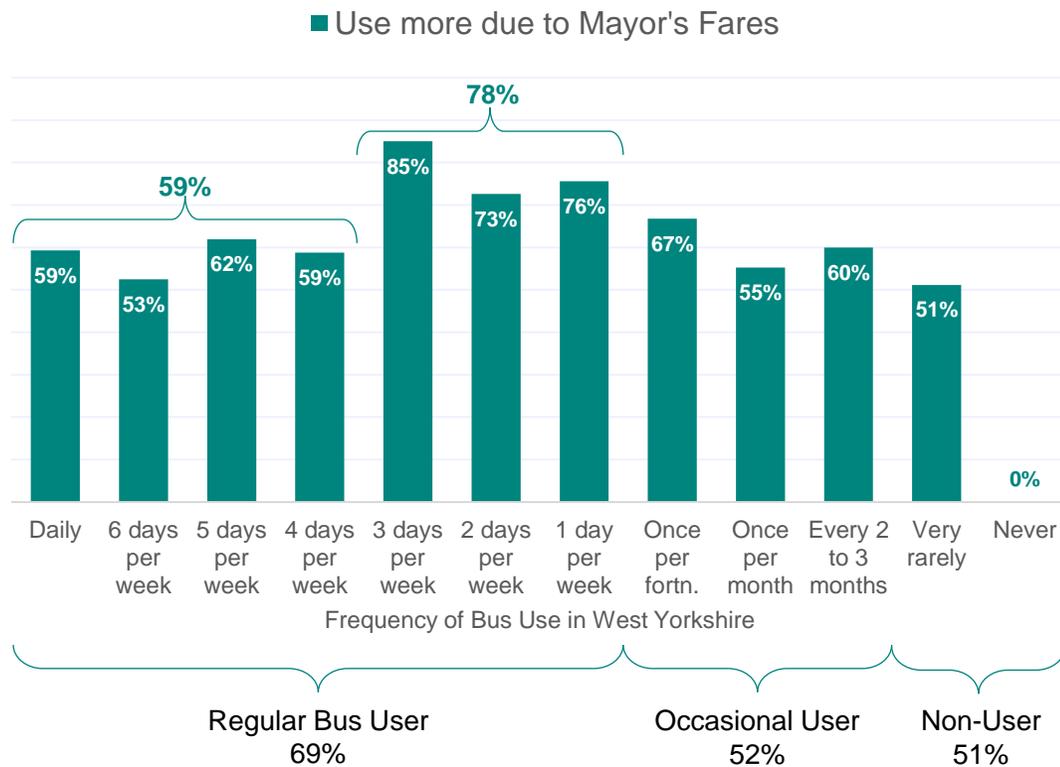
### Bus Use Compared With Before Mayor's Fares



Q: How often do you use buses in West Yorkshire? Q: Compared to before September 2022, are you using buses in West Yorkshire [same, more or less]?  
Weighted Base: All Respondents: 1028 weighted.

# Passenger generation and retention: Bus use attributable to Mayor's Fares appears most likely in respondents using buses 1 to 3 days per week.

Of respondents using the bus more than before, those using bus 1 to 3 days per week were significantly more likely to do so than those using the bus 4 to 7 days per week. Of respondents using the bus the same amount as before, regular bus users were significantly more likely to say that this usage has been encouraged by Mayor's Fares than occasional bus users (56% to 38%).

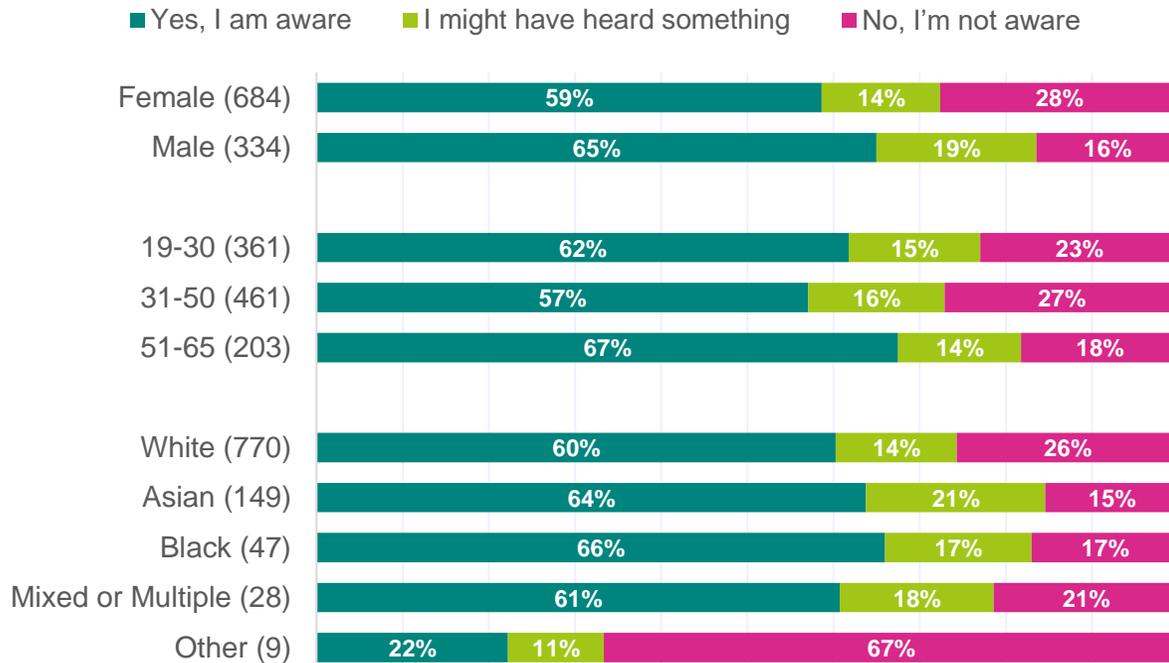


Q: How often do you use buses in West Yorkshire? Q: Compared to before September 2022, are you using buses in West Yorkshire [same, more or less]?  
 Weighted Base: All Respondents: 1028 weighted.

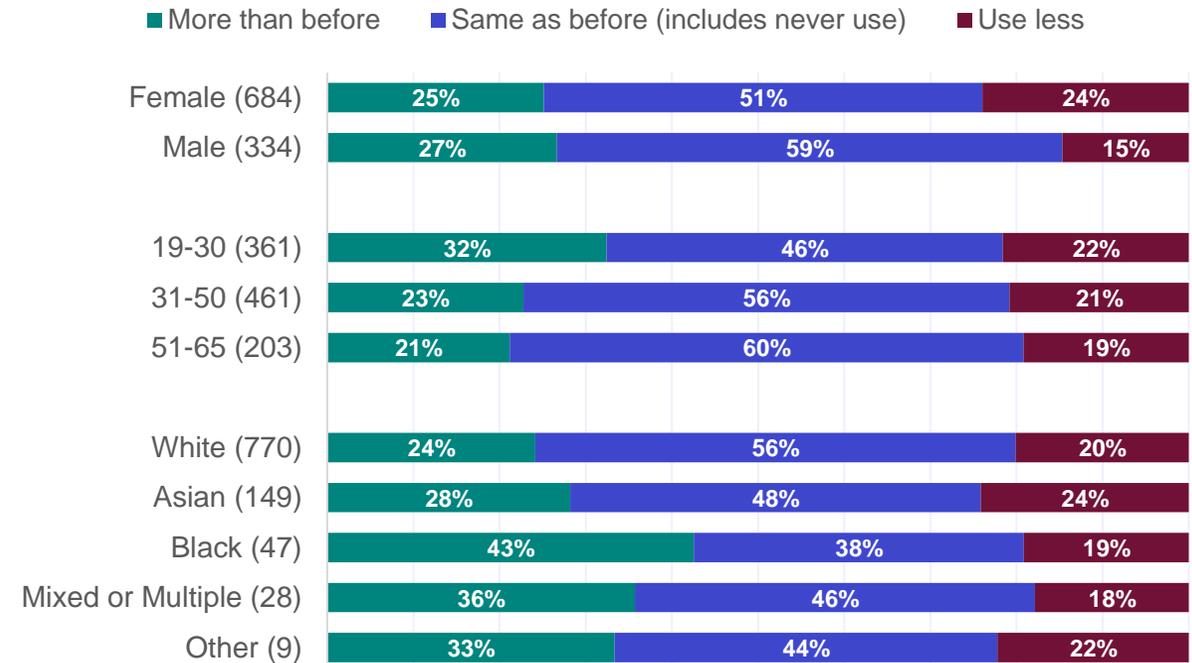
# Awareness and Bus Use: Differences by Gender, Age, and Ethnicity

- Females are more likely to be unaware of Mayor's Fares than males (28% v 16%).
- Respondents with white ethnic backgrounds are more likely to be unaware of Mayor's Fares than Asian / Asian British backgrounds (26% v 15%).
- There was no significant difference between the age bands.
- Females more likely to have reduced their bus use (24%) than males (15%).
- Age 19-30 more likely to have increased their bus use (32%) than age 31-50 (23%) or age 51-65 (21%).
- People of Black, Black British, Caribbean or African backgrounds are more likely to have increased their use (43%) than white (24%).

Awareness



Bus Use Compared with before September 2022



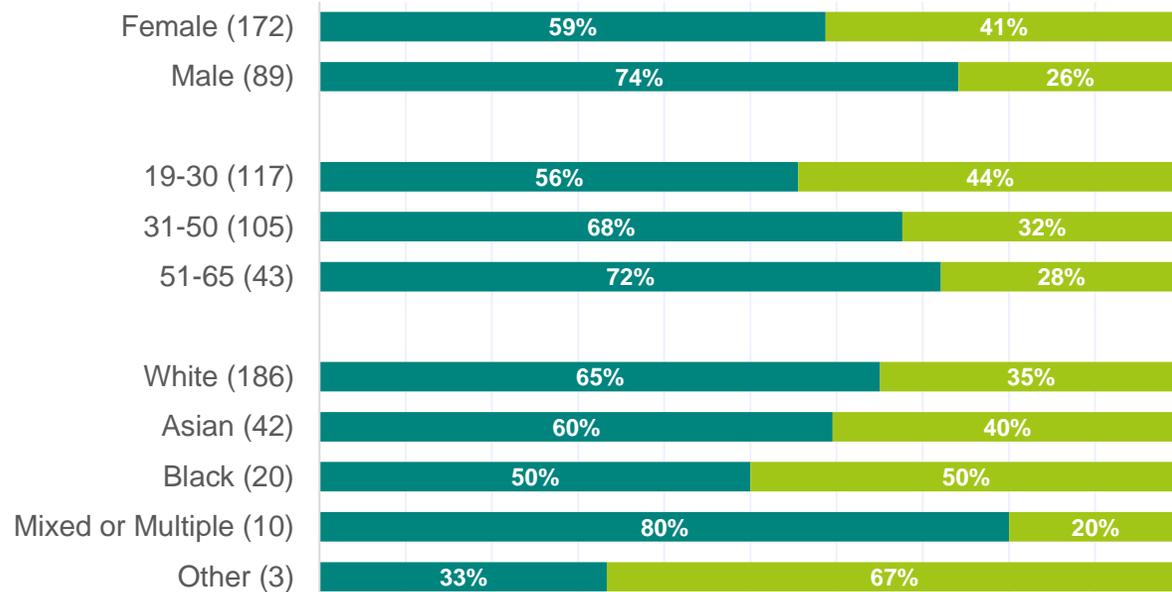
Q: Are you aware of Mayor's Fares (a £2 fare cap for single journeys and £4.50 for the day)? Q: Compared to before September 2022, are you using buses in West Yorkshire [same, more or less]? Base shown in brackets (unweighted). 'Prefer not to say' and 'other gender' not shown. Asian = Asian, Asian British, Black = Black, Black British, Caribbean or African.

# Respondents who Use Bus More: Differences by Gender, Age, and Ethnicity

- Although there appear to be gender, age and ethnicity differences in whether increased use is due to Mayor's Fares these have not been found to be statistically significant.
- Age 19-30 are less likely to have replaced car driver journeys with bus journeys (15%) than age 31-50 or age 51-65 (both 47%).
- Age 19-30 are more likely to have replaced car passenger journeys with bus use (22%) than age 31-50 (9%) or age 51-65 (5%).
- Other apparent changes are not statistically significant.

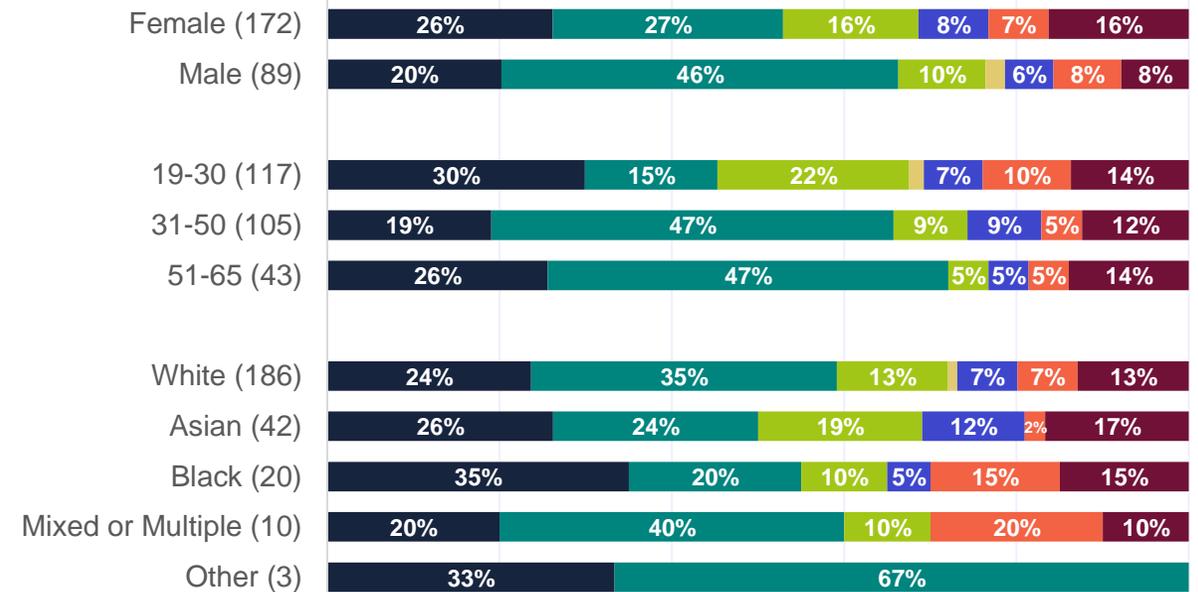
Use More Due, is this Due to Mayor's Fares

■ Yes ■ No



Previously

■ Not making ■ Car (driver) ■ Car (passenger) ■ M'bike / M'Scooter ■ Taxi ■ Train ■ Active Travel



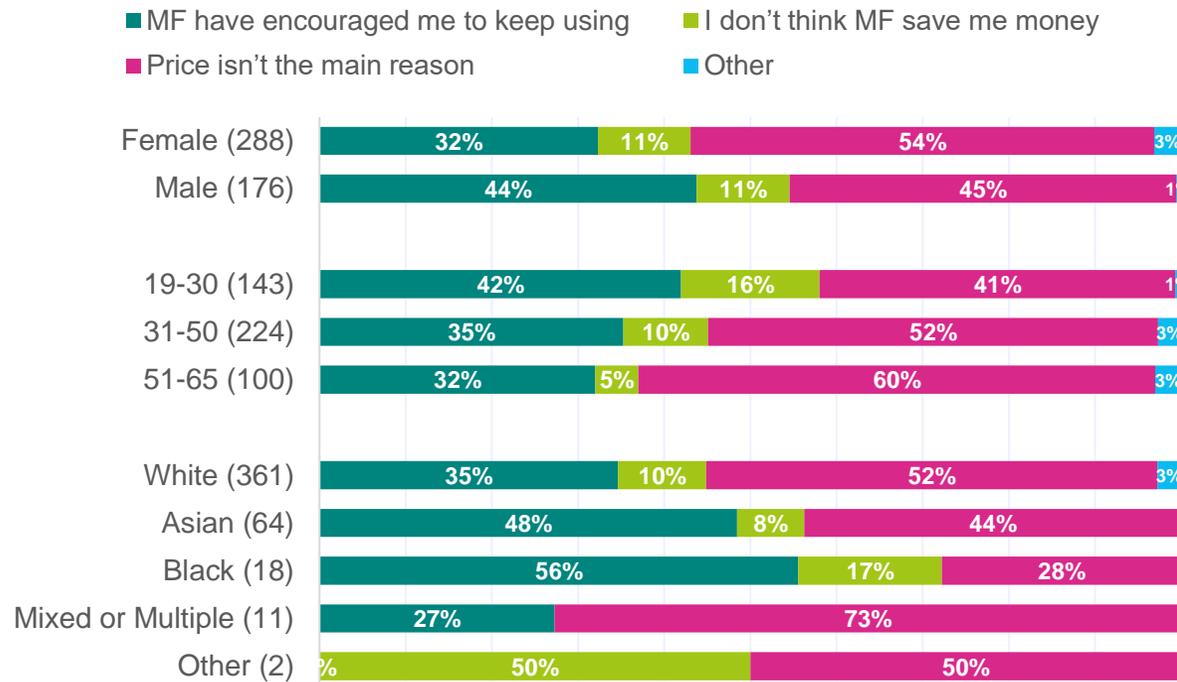
Q: You have said you are using the bus more often, is this due to Mayor's fares? Q: You have said you are using the bus more, which was the main way you made these extra bus journeys previously? [Single select] ? Base shown in brackets (unweighted). 'Prefer not to say' and 'other gender' not shown. Asian = Asian, Asian British, Black = Black, Black British, Caribbean or African.

# Reasons for Same or Less Use: Differences by Gender, Age, and Ethnicity

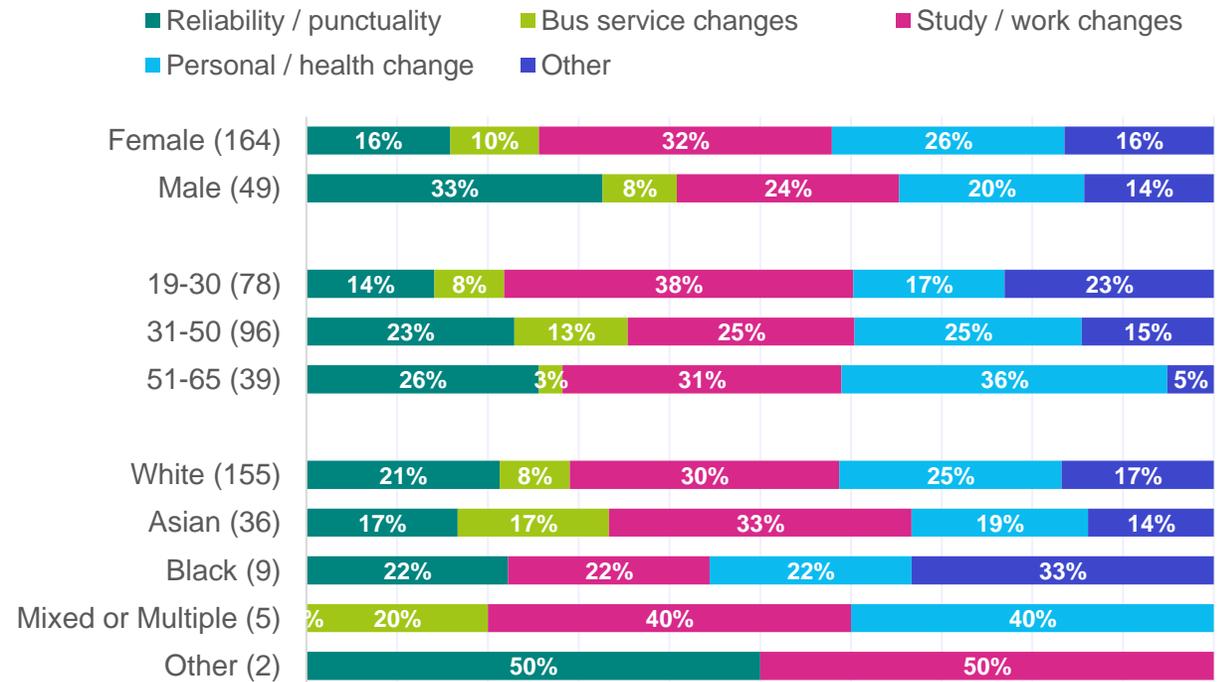
- Among respondents who use the bus the same amount as they used to, those age 51-65 are more likely to say that price isn't the main reason behind their choice (60%) than age 19-31 (41%).
- Other apparent differences in reasons to use less are not statistically significant.

- Although 33% of males and only 15% of females gave reliability / punctuality issues as the reason for using bus less it is not statistically significant.
- Other apparent differences in reasons to use less are not statistically significant.

Use Same - Reasons



Use Less - Reasons

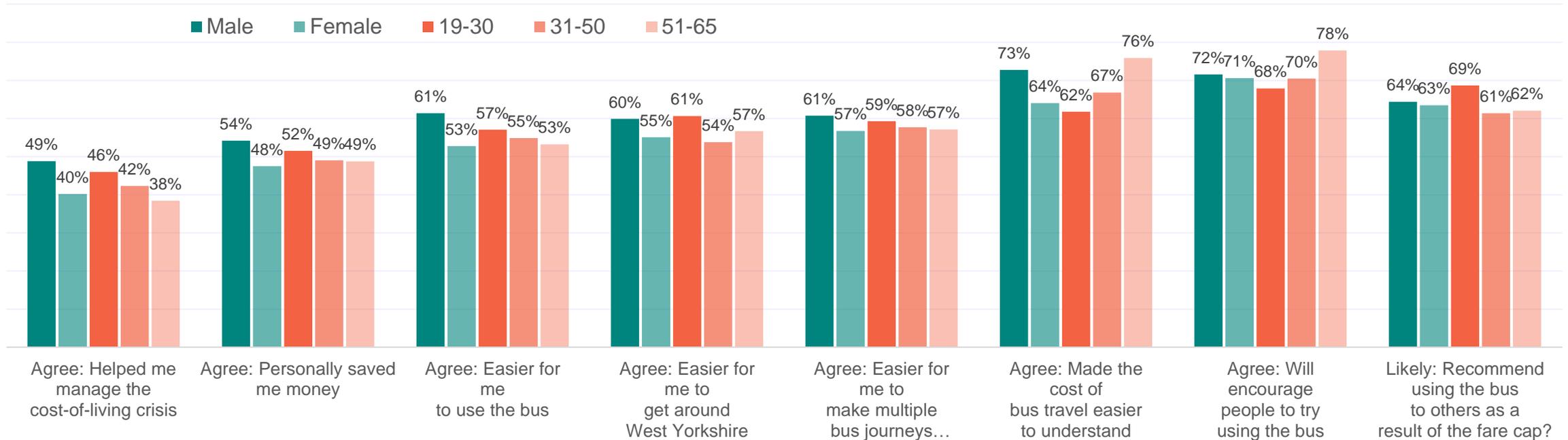


Q: You have said that you use the bus the same amount as now as before Mayor's Fares, which of the following statements best reflects your view? Q: You have said you are using the bus less often, can you explain why? Base shown in brackets (unweighted). 'Prefer not to say' and 'other gender' not shown. Asian = Asian, Asian British, Black = Black, Black British, Caribbean or African.

# Mayors Fares Impact: Differences in sentiment by Age and Gender

Male respondents are significantly more likely than females to agree that Mayor' Fares have made the cost of bus travel easier to understand (73% cf. 64%)

Respondents aged 51-65 are significantly more likely than aged 19-30 to agree that Mayor' Fares have made the cost of bus travel easier to understand (76% cf. 62%)

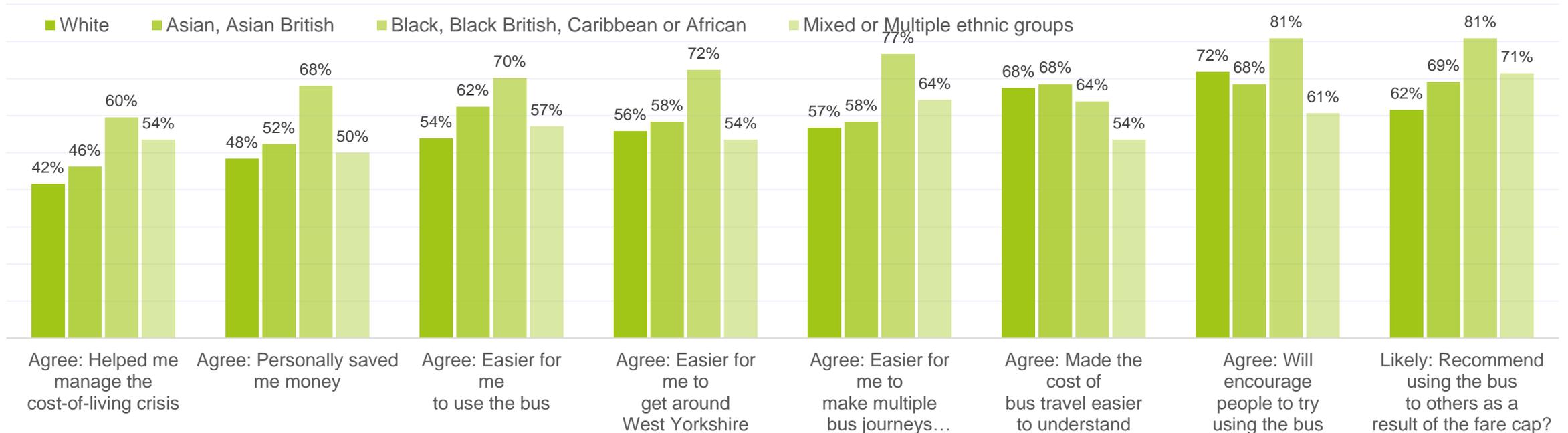


Q: How much do you agree or disagree with the following statements about the Mayor's Fares?

Q: Overall, how likely are you to recommend using the bus to others as a result of the fare cap? Base: Various unweighted

# Mayors Fares Impact: Differences in sentiment by Ethnic Background

- Respondents of Black, Black British, Caribbean or African ethnic backgrounds more likely to agree each of the following about Mayor's Fares than respondents of White ethnic backgrounds.
  - Mayor's Fares have personally saved me money (68% cf. 48%),
  - Mayor's Fares have helped me manage the cost-of-living crisis (60% cf. 42%),
  - Mayor's Fares have made it easier for me to make multiple bus journeys on the same day (77% cf. 57%);
- Respondents of Black, Black British, Caribbean or African ethnic backgrounds were more likely to than White ethnic backgrounds to say that they would recommend using the bus to others as a result of the fare cap (81% cf. 62%).



Q: How much do you agree or disagree with the following statements about the Mayor's Fares?

Q: Overall, how likely are you to recommend using the bus to others as a result of the fare cap? Base: Various unweighted

# Open Responses: 'Other' reasons why respondent's bus use hasn't changed or has reduced.

Use bus same as before Mayor's Fares	Count
Don't use buses as often	1
I don't find buses clean or reliable enough	1
I don't use the bus often	1
I have a disabled bus pass	1
I use an annual Metrocard	1
I'm unaware of the Mayor's fares	1
It's not convenient for me to use the bus	1
It's not worth going to city centre anymore the council have destroyed it	1
To get to work. Get free bus	1
Unable to use buses as they don't start early enough for me to get to work.	1

Never use bus (no change)	Count
I cannot use buses, as in too much pain to get to bus stop never mind getting on bus and driver setting of before you sit down	1
I do not need to use the bus on a daily / weekly basis	1
I have a car	2
I have a car so don't need to use the bus	1
I have a medical condition that makes it difficult to use public transport, I use my car.	1
I recently moved to Bradford, did not have the chance to use buses yet.	1
I use a car, but would use bus if needed	1

Use Less (Grouped)	Count
Got driving licence	6
Got / getting a car	8
Car or Drive (not specific)	11
Don't like them, car feels more safe	1
Facilities not suitable for pushchair access	1
Impractical for my needs	1
Prefer to walk	1
There's no need for me to use buses	1
They are awful	1
Behaviour of other passengers	1
Cost increase alongside fewer trips	1
None	1

Q: Age? Gender? Ethnicity? Q: Compared to before September 2022, are you using buses in West Yorkshire [same, more or less]?

Q: You have said that you use the bus the same amount as now as before Mayor's Fares, which of the following statements best reflects your view.

Q: You have said you are using the bus less often, can you explain why? Unweighted.



# Appendix: Questionnaire

Mayor's Fares - On-Line Panel Survey - October 2023 Results

# Questionnaire

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## Screening

[Pre-screening Yorkshire & Humber > West Yorkshire. If don't live in West Yorkshire out of scope, terminate]

**S1.** Which local authority district do you live in?

Bradford,

- Calderdale
- Kirklees
- Leeds
- Wakefield

**S2.** Which of these age categories do you belong to?

- Under 19
- 19-30
- 31-50
- 51-65
- 66 or over
- Prefer not to say

[If 'Under 19' or '66 or over' out of scope, terminate]

## Core Questions

**Q1.** Are you aware of Mayor's Fares (a £2 fare cap for single journeys and £4.50 for the day)?

- Yes, I am aware
- I might have heard something
- No, I'm not aware

**Q2.** How often do you use buses in West Yorkshire?

- Daily
- 6 days a week
- 5 days a week
- 4 days a week
- 3 days a week
- 2 days a week
- 1 day per week
- About once per fortnight
- Once per month
- Every 2 to 3 months
- Very rarely (3 times a year or less)
- Never

**Q3.** Compared to before September 2022, are you using buses in West Yorkshire:

- Same as before (no change)
- More than before (or started using them)
- Use less (or stopped using them)?

**Q4. [Ask if Q3 frequency = 'more']**

You have said you are using the bus more often, is this due to Mayor's fares?

- Yes
- No

**Q5. [Ask if Q3 frequency = 'more']**

You have said you are using the bus more, which was the main way you made these **extra** bus journeys previously? *[select one]*

- I was not making these journeys previously
- Car (as a driver)
- Car (as a passenger)
- Train
- Walk/Wheeling (moving at pedestrian pace)
- Cycle/Manual Scooter
- Taxi
- Motorbike/Motor Scooter

# Questionnaire continued

**Q6a.** [Ask if: Q3 = 'same' and Q2 not 'never'] You have said that you use the bus the same amount as now as before Mayor's Fares, which of the following statements best reflects your view:

[select one]

- Mayor's Fares have encouraged me to keep using buses
- I don't think Mayor's Fares save me money
- Price isn't the main reason behind my choice on bus use
- Other (please specify)

**Q6b.** [Ask if, Q3 = 'same' and Q2 = 'never'] You have said that you use the bus the same amount as now as before Mayor's Fares, which of the following statements best reflects your view:

[select one]

- I don't think Mayor's Fares save me money
- Price isn't the main reason behind my choice on bus use
- I have no interest in using buses
- Other (please specify)

**Q7.** [Ask if Q3 frequency = 'less']

You have said you are using the bus less often, can you explain why?

- Change of study / work circumstance
- Change in personal circumstances / health
- Change in bus services where I travel
- Reliability / punctuality issues
- Other (please specify)

**Q8.** Overall, how likely are you to recommend using the bus to others as a result of the fare cap?

- Very likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Very unlikely

**Q9.** How much do you agree or disagree with the following statements about the Mayor's Fares?

[Strongly Agree, Agree, Neutral, Disagree, or Strongly Disagree]

- Mayor's Fares have personally saved me money
- Mayor's Fares have helped me manage the cost-of-living crisis
- I think Mayor's Fares makes it easier for me to use the bus
- I think Mayor's Fares will encourage people to try using the bus
- Mayor's Fares makes it easier for me to get around West Yorkshire
- Mayor's Fares makes it easier for me to make multiple bus journeys on the same day
- Mayor's Fares have made the cost of bus travel easier to understand

## Demographics

*The following questions will not identify you but if you do not feel comfortable answering any question please select 'prefer not to say'.*

**Q10.** How would you describe your ethnicity or ethnic background?

- Asian, Asian British
- Black, Black British, Caribbean or African
- Mixed or Multiple ethnic groups
- White
- Other
- Prefer not to say

**Q11.** How would you describe your gender?

- Male
- Female
- Other
- Prefer not to say

**SURVEY END**



# Appendix: Demographics

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# Demographic Spread of Sample

Age	Sample	Sample %	Target Pop %	Weighted Sample %
19-30	361	35.1%	26.4%	26.8%
31-50	461	44.8%	43.5%	43.2%
51-65	203	19.7%	30.0%	29.8%
Prefer not to say	3	0.3%	0.0%	0.3%

Gender	Sample	Sample %	Target Pop %	Weighted Sample %
Female	684	66.5%	51.0%	50.5%
Male	334	32.5%	49.0%	48.5%
Other Gender	4	0.4%	0.0%	0.4%
Prefer not to say	6	0.6%	0.0%	0.6%

District	Sample	Sample %	Target Pop %	Weighted Sample %
Bradford	250	24.3%	22.5%	24.4%
Calderdale	73	7.1%	8.6%	7.7%
Kirklees	194	18.9%	18.1%	19.0%
Leeds	372	36.2%	35.8%	35.6%
Wakefield	139	13.5%	15.0%	13.3%

Ethnicity	Sample	Sample %	Target Pop %	Weighted Sample %
Asian, Asian British	149	14.5%	15.9%	13.4%
Black, Black British, Caribbean or African	47	4.6%	3.1%	4.5%
Mixed or Multiple ethnic groups	28	2.7%	2.8%	2.5%
Other ethnic group	9	0.9%	1.7%	0.9%
White	770	74.9%	76.6%	76.4%
Prefer not to say	25	2.4%	0.0%	2.4%

- The survey target was residents aged 19 to 65. For age, gender, and district the latest population has been obtained from ONS Mid-year population estimates 2021, selecting only the relevant ages.
- Population by ethnicity by single year of age was not available in published tables so is for all ages.
- Due to data protection concerns with the survey supplier using systems not covered by UK / EU data protection the survey did not capture characteristics relating to health or disability outcomes, nor to specific location or deprivation.
- The survey method excluded digitally excluded residents.

# Weighting

Gender	Age	Sample	Sample %	Population %	Weight Applied	Weighted Sample	Weighted Sample %
Female	19-30	247	24.0%	13.5%	55.6%	137.38	13.4%
Female	31-50	311	30.3%	22.3%	72.7%	226.20	22.0%
Female	51-65	124	12.1%	15.2%	124.5%	154.38	15.0%
Male	19-30	107	10.4%	12.9%	122.5%	131.04	12.7%
Male	31-50	148	14.4%	21.2%	145.6%	215.44	21.0%
Male	51-65	78	7.6%	14.8%	193.0%	150.55	14.6%
	<i>Sub-total</i>	<i>1015</i>	<i>98.7%</i>			<i>1015.00</i>	<i>98.7%</i>
Prefer not to say	19-30	4	0.4%	26.4%	100.0%	4.00	0.4%
Other Gender	19-30	3	0.3%	26.4%	100.0%	3.00	0.3%
Prefer not to say	31-50	2	0.2%	43.5%	100.0%	2.00	0.2%
Other Gender	51-65	1	0.1%	30.0%	100.0%	1.00	0.1%
	<i>Sub-total</i>	<i>10</i>	<i>1.0%</i>			<i>10.00</i>	<i>1.0%</i>
Female	Prefer not to say age	2	0.19%	51.0%	76.5%	1.53	0.15%
Male	Prefer not to say age	1	0.10%	49.0%	146.9%	1.47	0.14%
	<i>Sub-total</i>	<i>3</i>	<i>0.29%</i>			<i>3.00</i>	<i>0.29%</i>
	<b>Total</b>	<b>1028</b>	<b>100.0%</b>			<b>1028</b>	<b>100.0%</b>

Weighting of 100% applied to Gender 'Other' and 'Prefer not to say', this avoided factors less than 50% and greater than 200%



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**Thank you**

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