West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

Mayor's Fares Impact Survey 2025

Insights Report

Research & Intelligence Team / September 2025

Section A: Headlines

A face-to-face survey of over 2,000 people, conducted in May to July 2025 found:

- Awareness of Mayor's Fares remains high. Two-thirds of respondents (67%) reported being aware of the West Yorkshire fare cap, in line with the results in autumn 2024 (69% aware) and slightly higher than in autumn 2023 (62%).
- Mayor's Fares have directly impacted people's lives, though with lower levels of agreement in summer 2025 than in autumn 2024:
    - Almost three-quarters of respondents (73%) agreed that they understood how much it costs to catch a bus in West Yorkshire, down slightly from 79% in autumn 2024.
    - The share of respondents who agreed that they can afford to travel by bus in West Yorkshire whenever they want to fell slightly; 69% in the latest survey, down from 75% in autumn 2024.
    - Three in five of respondents (59%) agreed that the fare cap makes it easier for them to make multiple bus journeys on the same day, down from four in five (78%) in autumn 2024.
    - Around one third of respondents who use the bus, even if rarely, agreed that the fare cap encouraged them to participate in more leisure activities, down from almost half of respondents in autumn 2024, whilst a quarter of respondents agreed that the fare cap had improved their ability to access job opportunities or consider employment further from home, down from about half in autumn 2024.
- Respondents were asked how often they caught a bus in West Yorkshire compared to before April (before the prices changed); 3% said they were using them more, while 10% said they were using them less, a net loss of 7%. Younger adults (aged 19-25), those looking after home/family, as well as respondents in multiple-car households, were groups most likely to report a decline in use.
- Respondents who reported a change in use were asked why.
    - For those who started using, or increased use of buses, 24% said this was because they were cheaper than alternative options (down from 44% in the autumn 2024 survey).
    - For those who reported using buses less or stopped using them entirely, 30% said this was because bus fares have increased, whilst 21% reported needing to travel to fewer places, and 18% said other transport options have improved.
    - Taking into account the number of respondents who started using or increased their use of buses, as well as the number of respondents who reported using buses less or stopped using them entirely, the data suggests that a net 2% were using buses less due to fares. This means that a net 5% of respondents are using buses less for other reasons.
- Respondents who never use a bus, or who reported using them less (since April), were asked what could encourage them to switch to using buses. Whilst half said that nothing would make them use a bus, improving reliability and frequency were selected by 32% and 22% of respondents respectively, and 18% said lower bus fares.

Section B: Background

1. Survey method

The Combined Authority has commissioned surveys to gain insight into the use and perceptions of Bus Service Improvement Plan fares initiatives (Mayor's Fares) that were introduced on 04 September 2022. The caps were increased to £2.50 for a single fare and £6 for a day fare, with effect from 30 March 2025. The period for the summer 2025 fieldwork was deliberately chosen so that the 2025 fares increase had some time to bed-in and ahead of the need for decisions on 2026 fares. The summer 2025 fieldwork builds on two previous surveys, so some comparison or amalgamation of results is possible in addition to stand-alone analysis from the 2025 survey responses.

Survey	Fieldwork Period	Historic Horizons	Total Participants
Autumn 2023 – online – wave 0	About 2 weeks 12-10-2023 to 24-10-2023	Frequency of bus use: *'Before September 2022'* Ticket choice: not asked	1,028
Autumn 2024 – face-to-face – wave 1	About 10 weeks 08-10-2024 to 22-12-2024	Frequency of bus use: *'Fare caps were introduced in September 2022. Has your bus use in West Yorkshire changed over the last couple of years?'* Ticket choice: *'since September 2022'*	2,013
Summer 2025 – face to face – wave 2	About 10 weeks 13-05-2025 to 27-07-2025	Frequency of bus use: *'Before April'* Ticket choice: *'in the last 12 months'*	2,221

A target age range of 19 to 65 was chosen to encompass the target audience for turn-up-and-go adult fares. As it is a face-to-face survey, it covered visitors as well as residents. 2,130 responses were received from residents aged 19 to 65, plus a further 64 from visitors, a further 21 from persons aged 66 or over who pay a fare to travel before 09:30 Monday to Friday, and 5 who did not give these details in full.

Weighting has been applied primarily to residents' responses by deprivation index, local authority district, age, and gender. Secondary weighting was applied based on distance from the postcode point to a bus stop with a frequent service. Appendix A, supplied by the consultants DJS Research Limited, describes the application of the weighting.

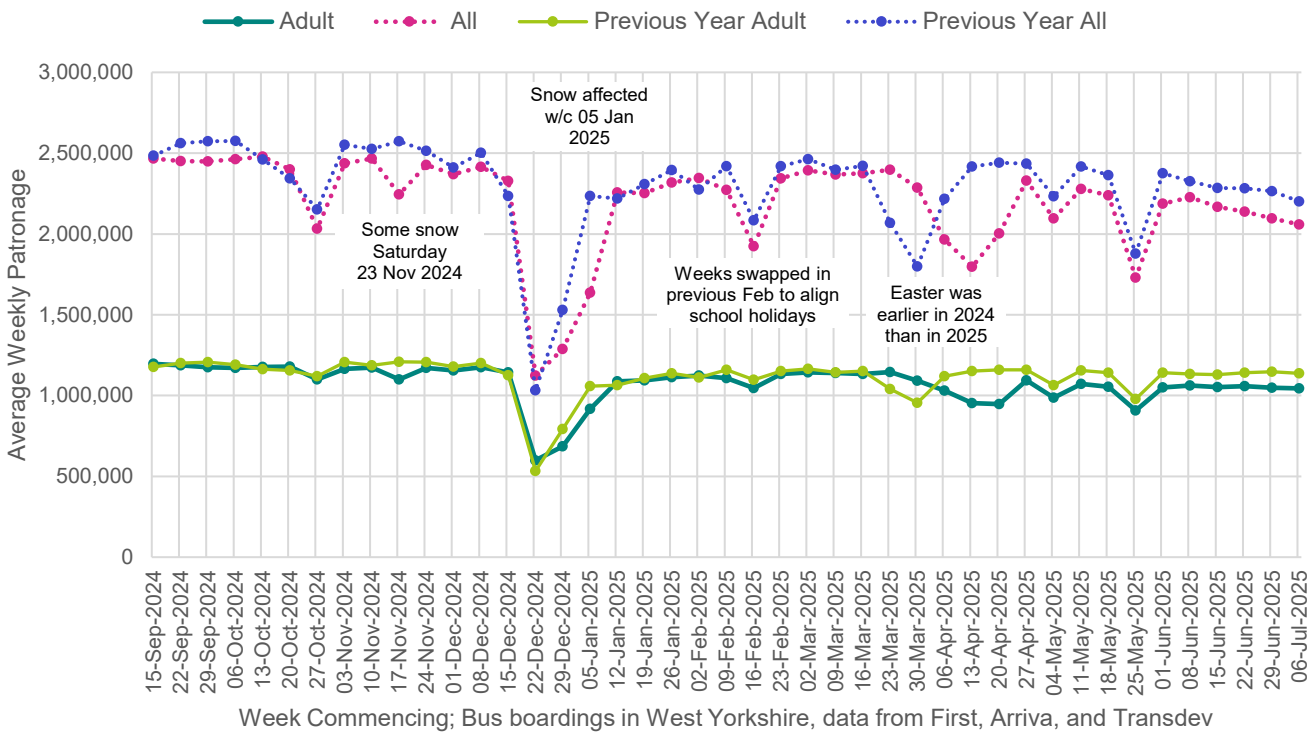
Respondents were grouped by their frequency of bus use in the West Yorkshire Bus Service Improvement Plan (BSIP) categories of

- Regular - use at least once a week,
- Occasional - use at least once a quarter but less than once a week,
- Rare - use less than once a quarter, and
- Never use.

Note the sample appears skewed towards regular users when compared against the West Yorkshire Residents Perceptions of Transport survey, even after applying the weighting as described in Appendix A. As a skew had been observed in the autumn 2024 survey, the survey fieldworkers had been asked to try to improve the balance. They did manage to interview a higher proportion of people who never use a bus, but regular users appear over-represented again – especially those who use a bus 4 to 7 days a week – while occasional users appear under-represented.

2. Bus use trends: empirical evidence

The chart below shows passenger bus boardings in West Yorkshire recorded by the three largest operators (First, Arriva, and Transdev). It reveals that, compared to last year, there has been consistently lower use of adult tickets since the start of April.



The table below summarises the chart into periods for comparison:

- 11 weeks leading up to the Christmas holidays,
- 11 weeks leading up to Easter holidays, avoiding the snow disruption in early January 2025
- 4 weeks around Easter time, and
- 11 weeks between Easter and Summer holidays.

The Combined Authority had previously noted a small reduction in patronage in the second half of 2024 compared to the previous year, after a period of year-on-year growth. Data in early 2025, excluding the snow and ice impacts, shows a slight drop in patronage.

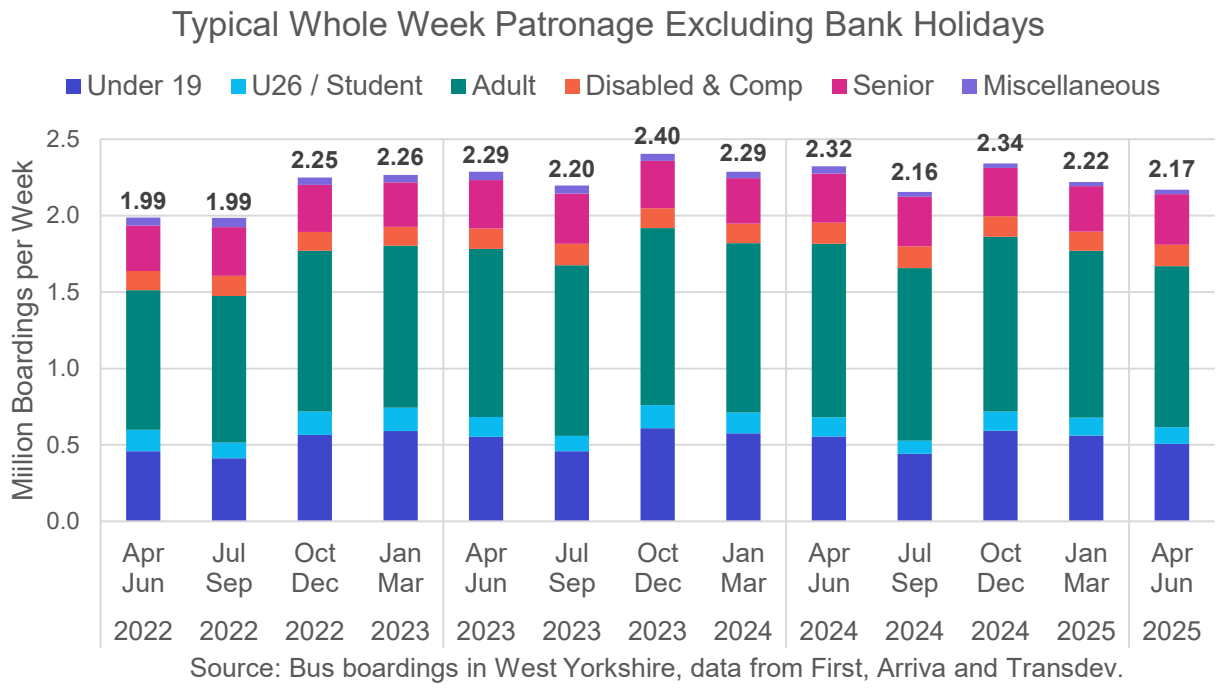
The West Yorkshire fare caps increased with effect from 30 March 2025. Simultaneous increases affected Mayor's Fares (adult), fare deal for young people (age under 19), and MCard student/young adult fares. Since the fare cap increase, there has been 7% year-on-year reduction in adult ticket usage. At the July 2025 meeting of the West Yorkshire Combined Authority Transport Committee, Megan Hope (Director, Operations, N & WY, First Bus) stated that there had been a drop in short-hop journeys, partly driven by this year's fairer weather[1].

[1] Source: Recording of 23/07/25 – Transport Committee, published by West Yorkshire Combined Authority on YouTube, https://www.youtube.com/watch?v=WvqTUTYoGIg. Watch at 36:08 to 37:10. "Across the whole of West Yorkshire we have seen a 13% reduction in patronage, mainly around young people and adults. What we are seeing is the short-hop [journeys] less than a mile people are choosing to walk, the weather has been fairer this year and that is driving some of that."

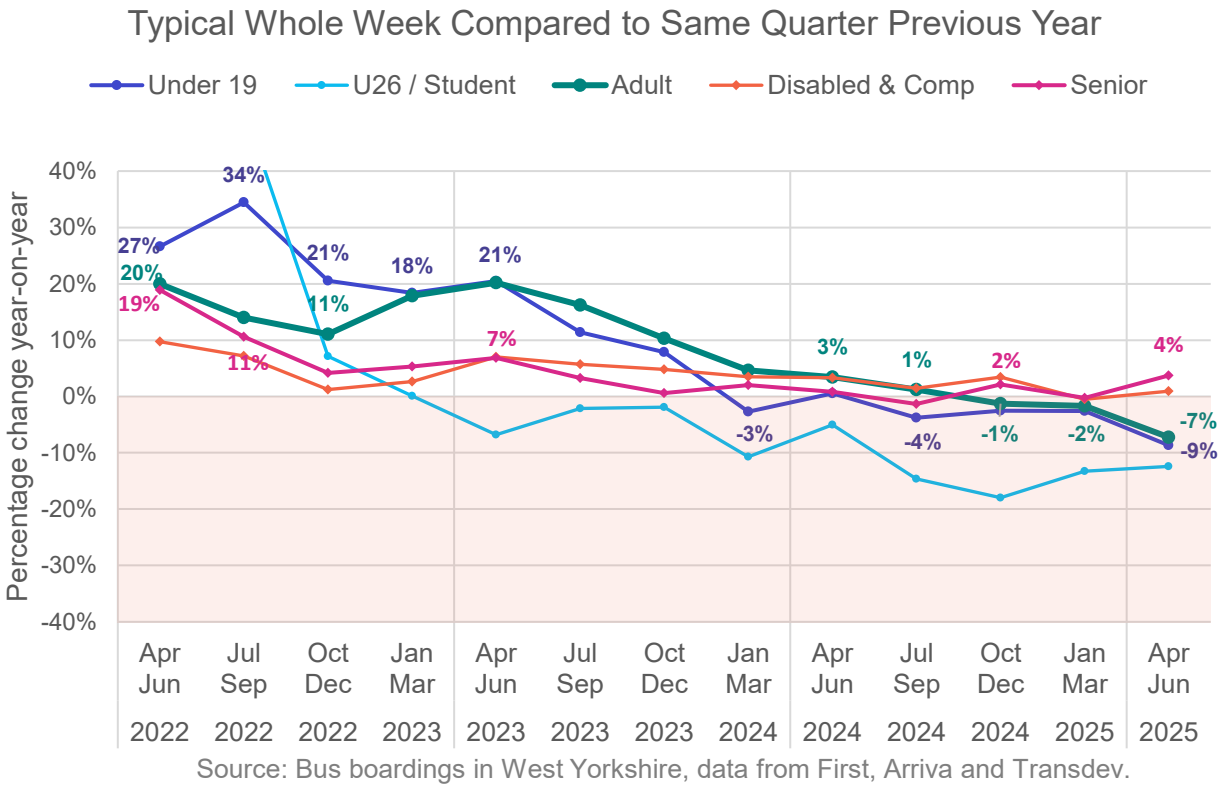
3. Difference by Cohort

Many factors influence decisions to use or not use a bus; fares is just one of them. If we assume that other factors - including differences in weather, scheduled service availability, punctuality, and reliability - affect all cohorts to a generally equal extent, then it may be postulated that empirical evidence would show similar change across all cohorts.

Year-on-Year reduced patronage in recent quarters was reported to Transport Committee. Data shows that in April to June 2025, the cohorts affected by the 30 March fare increases reduced at a faster rate than in January to March, while journeys on senior and disabled cards increased.



Source: Bus boardings in West Yorkshire, data from First, Arriva and Transdev.

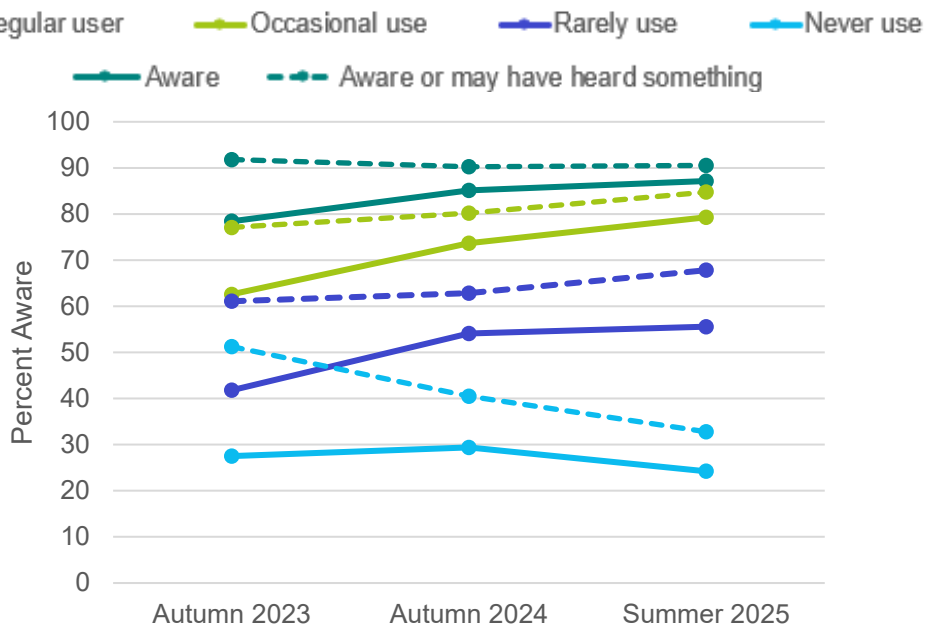


Source: Bus boardings in West Yorkshire, data from First, Arriva and Transdev.

Section C: Awareness

4. Awareness of Fare Caps

67% of respondents were aware of the West Yorkshire Mayor's bus fare cap in the summer 2025 survey, as against 69% in autumn 2024, and 62% in autumn 2023.



Question A8: Are you aware of the West Yorkshire Mayor's bus fare caps introduced in September 2022 (the current caps are £6 for a day and £2.50 for single journeys)? **Question B1**: How often do you catch a bus in West Yorkshire? **Weighted Base**: autumn 2023 - 1,028; autumn 2024 - 1,997; summer 2025 - 2,221.

Between autumn 2023 and autumn 2024, there was a general increase in the number of respondents who were aware, though there was a drop in the number of non-users who were aware or may have heard something. Awareness in autumn 2024 may have been boosted a little as the question of what would happen to national and local fare caps after December of that year was getting national and local news coverage. It appears that more recently, the awareness level among people who never use a bus has reduced, while there has been some increase among those who use a bus occasionally or rarely. It appears that some of the recent change in awareness among occasional users is a side-effect of respondents who have switched from regular to occasional bus use, suggesting it is not necessarily a growth in awareness among these individuals but rather that they happen to be categorised in a different usage level segment.

5. Awareness of Fare Increase

65% of respondents noticed the bus fares increase at the end of March. Respondents' awareness of the March 2025 fare increase was quite similar to their awareness of the fare caps, though it appears that respondents who use the bus less than once a week, or never, were slightly less likely to be aware of the fare increase than to be aware of the fare cap.

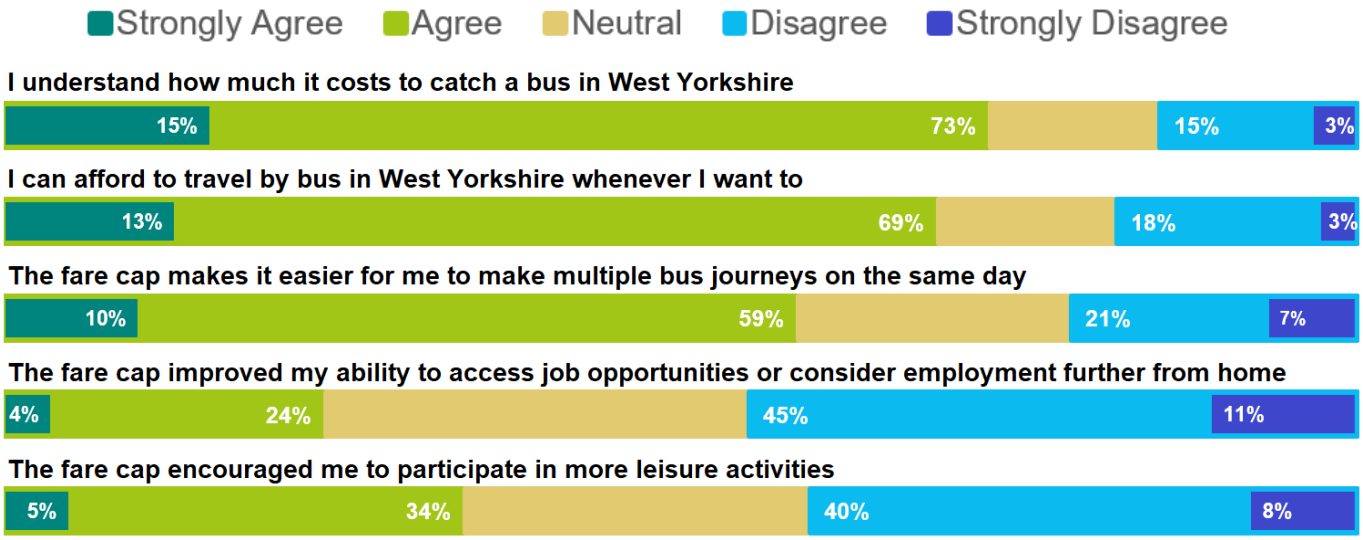
	Regularly uses bus	Occasionally uses bus	Rarely or Never uses bus	2025 Overall
Yes	87%	73%	30%	65%
Not sure	2%	6%	8%	5%
No	11%	21%	62%	30%

Question A9: Did you notice West Yorkshire bus fares increase at the end of March?

Section D: Headline Sentiments

6. The latest results …

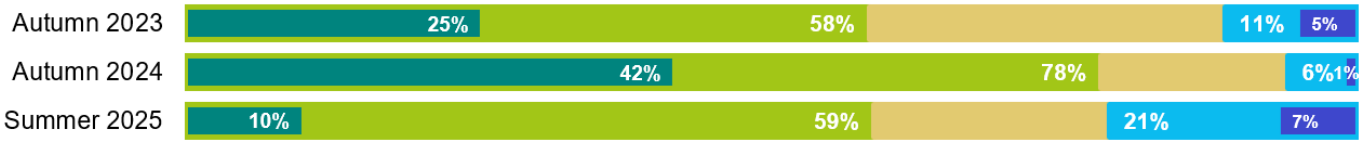
73% of respondents agreed that they understood how much it costs to catch a bus in West Yorkshire, **69%** of respondents agreed that they can afford to travel by bus in West Yorkshire whenever they want to, **59%** of respondents agreed that the fare cap makes it easier for them to make multiple bus journeys on the same day, **34%** agreed that the fare cap encouraged them to participate in more leisure activities, **24%** of respondents agreed that the fare cap had improved their ability to access job opportunities or consider employment further from home.



7. Understanding and ease of use

All respondents were asked about their **understanding of the cost of catching a bus**.
73% of respondents agreed that they understood how much it costs to catch a bus in West Yorkshire, compared to **79%** in autumn 2024, and **69%** in autumn 2023.

Respondents who use the bus, even if rarely, were asked about the **ease of making multiple journeys on the same day**.
59% of respondents agreed that the fare cap makes it easier for them to make multiple bus journeys on the same day, compared with **78%** in autumn 2024 and 58% in autumn 2023.



A plausible theory is that two years of stability in West Yorkshire from September 2022 increased people's understanding of bus fares. It is also plausible that the period when the maximum fares was £2 across England also helped.

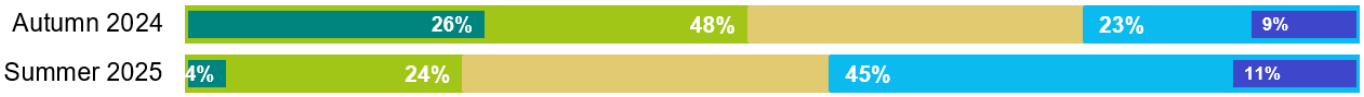
8. Affordability

Respondents who use the bus, even if rarely, were asked about their **ability to afford bus travel** and about potential benefits of the fare caps[2]. **69%** of respondents agreed that they can afford to travel by bus in West Yorkshire whenever they want to, compared to **75%** in autumn 2024.

9. Access to opportunities

Respondents who use the bus, even if rarely, were asked about their access to opportunities.

24% of respondents agreed that the fare cap had improved their **ability to access job opportunities or consider employment further from home**, compared with **48%** in autumn, while those who disagreed increased from **23%** to **45%**.



34% agreed that the fare cap **encouraged them to participate in more leisure activities**, while **40%** disagreed. This was a change from **52%** agreed and **26%** disagreed in Autumn 2024.

These sentiments are explored across various demographics in section J of this report.

[2] To distinguish between the national and local schemes the question wording was subtly changed from 'fare cap' in Autumn 2024 to 'Mayor's fares' in 2025.

Section E: Change in Bus Usage

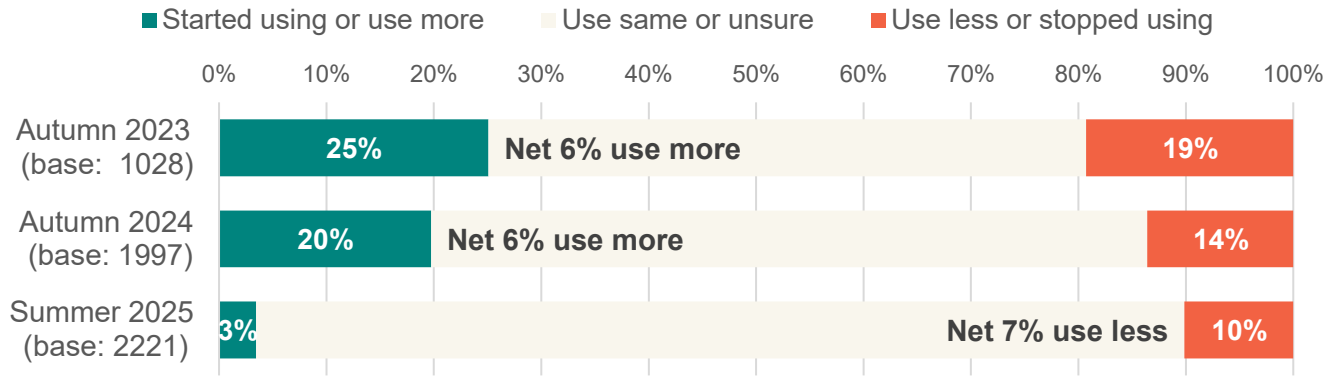
10. Overview of change in bus use

About 3% of respondents used the bus more or started using buses since the fares increases, compared with 10% who use buses less or stopped using them.

Comparison between those who started using or use more and those who use less or stopped using indicates a net loss of 7% of respondents. This is opposite to the net gain of 6% indicated by the autumn 2024 respondents.

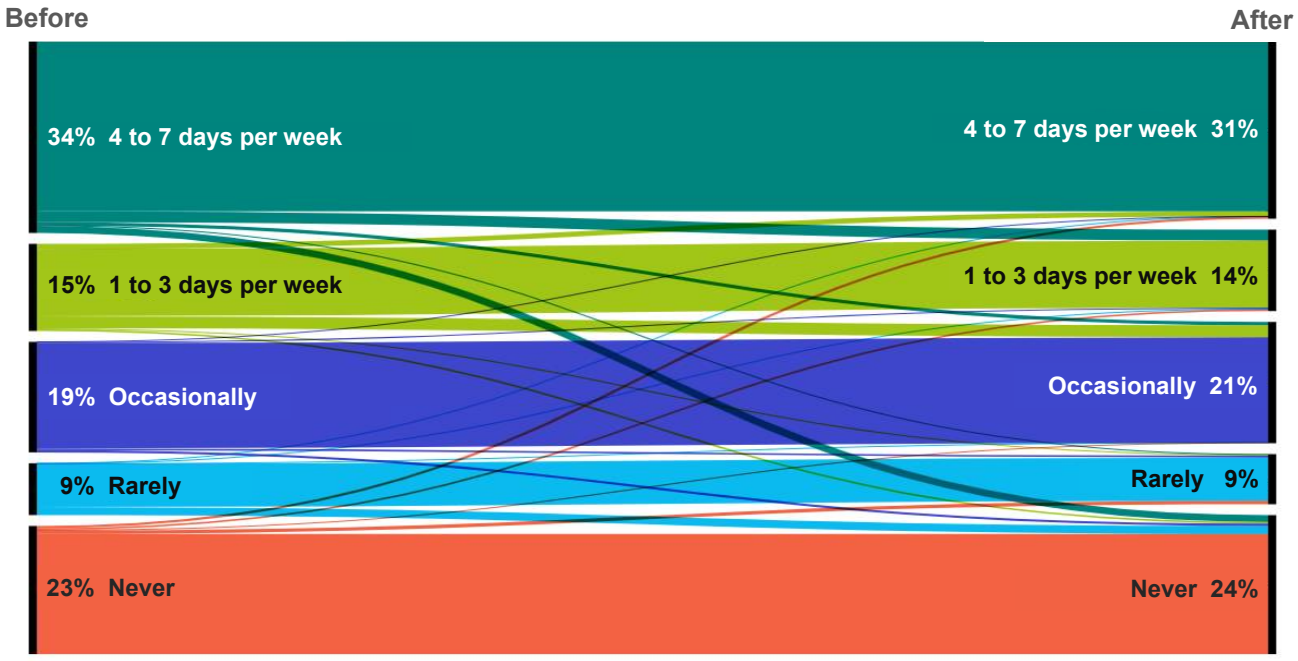
The autumn 2024 survey covered change since Mayor's Fares were introduced, so it asked people to think back more than two years, whereas the summer 2025 survey asked people to think back to before the recent price increase and therefore only a few months.

The different timing brings the possibility of different external factors affecting change in use, though empirical evidence in sections 2 and 3 above concurs with a net 7% reduction in use year-on-year.



Weighted Base Autumn 2023 - 1,028; Autumn 2024 – 1,997; Summer 2025 - 2,221.
Question B1: Thinking about bus travel, can you tell me how often do you catch a bus in West Yorkshire now and how often you did before April? **Question B4:** When you catch a bus in West Yorkshire do you tend to go shorter distances, longer distances, or about the same, as two years ago?

The change in use in 2025 includes 2% using buses more, 1% who started using them, 7% using buses less, and 3% who stopped using them. The chart below shows the changes in frequency of use.



11. Introducing the magnitude of change

Some aspects, a change from such as from once a week to once a fortnight or once a month, may be similar, and both would be a change from a regular user to occasional user categorisation; the change is of a different magnitude and will be seen differently in demand for bus services. In the absence of a travel diary, an attempt to measure magnitude has been made by assigning approximate values to each frequency of travel.

The UK statutory minimum leave entitlement is four full weeks (plus bank holidays). Some people get additional holiday, and some people, whether in employment or not, will have days when they are unable to make their normal use of bus. Therefore, these estimates treat respondents with a weekly or fortnightly pattern as having 48, rather than 52 weeks of that pattern.

Stated Frequency of Bus Use	Annualised Days	Stated Frequency of Bus Use	Annualised Days
7 days a week	336	About once per fortnight	24
6 days a week	288	Once per month	12
5 days a week	240	Every 2 to 3 months	5
4 days a week	192	1 or 2 times a year	1.5
3 days a week	144	Less than once a year	0.5
2 days a week	96	Never	0
1 day per week	48		

This means that a change from once a week to once a fortnight is estimated as replacing 48 days with 24 days, giving a net loss of 24 days per year, while from once a week to once a month is estimated as replacing 48 days with 12 days, giving a net loss of 36 days. As stated, in the absence of a travel diary, it is only possible to assign estimates.

Using this method suggests that respondents who have started using buses or are using them more often added 2%, and those who are using less or stopped using them took about 9% off the total days travelled on buses. This compares with the count of respondents at 3% and 10%, and it also suggests a net 7% reduction in use when counted as annualised days instead of people.

12. Influence of fares on change in bus use

Respondents with increased or decreased use were asked whether this was due to fares. Numbers are small but appear to indicate a net decrease in use of around 2% due to fares. The difference appears marginally greater when looked at in annualised days - attempting to allow for different levels of use by respondents - rather than simply as a percentage of respondents. The net difference in the sample counting respondents is **1.8%** but counting annualised days is **2.1%.**

Sections F, G, and H of this report provide further consideration of drivers of change.

Influenced by fares	Respondents	% of whole sample	Annualised Days
Increased use	99	1.2%	0.8%
Decreased use	225	3.0%	2.9%
	Net	**1.8%**	**2.1%**

13. Journey length and trips per day

The frequency of bus use, described in days, is the main metric of use in this survey. Further considerations can be the distance travelled and the number of buses boarded per day, when using buses. A question to indicate change in distance travelled was first included in the autumn 2024 survey. The distance change is used for some routing questions, based on the notion that a low capped fare may encourage longer journeys. A further question was added in summer 2025 to indicate change in the number of buses used per day.

Respondents appear more likely to make fewer trips, as opposed to more, trips per day (8% decreased their trips compared with 2% increased them).

	More buses per day	Same / Unsure per day	Fewer buses per day	Total
Longer distance	1%	1%	< 0.5%	2%
Same distance / Unsure	1%	88%	5%	94%
Shorter distance	< 0.5%	1%	2%	4%
Total	2%	90%	8%	100%

Question B4: When you catch a bus in West Yorkshire do you tend to go shorter distances, longer distances, or about the same as before the recent fares increases? **Question B5:** When you catch a bus in West Yorkshire do you tend to use fewer, the same number, or more buses in a day than before the recent fare increases? Weighted Base: 1,648 respondents continuing to use buses.

14. Change in bus use – demographic split

There is no statistically significant difference between male and female respondents, though net loss among **female** respondents appears higher at **8%** than for **male** respondents at **5%**.

Looking at age groups, there is a net loss of 17% of respondents aged 19-25, compared to a net loss of 5% in other age bands.

There appears to have been slightly more negative change from white ethnicities than from other ethnicities. The small difference follows on from there appearing to have been a lower positive change among white ethnicities than other ethnicities in the autumn 2024 survey.

21% of respondents whose economic status was looking after home or family were either using buses less or had stopped using them. This was a significantly higher figure than the 10% overall figure.

Change in bus use has also been looked at through the optic of household car availability. 21% of households with three or more cars had reduced or stopped their bus usage, while none (0%) had increased their usage.

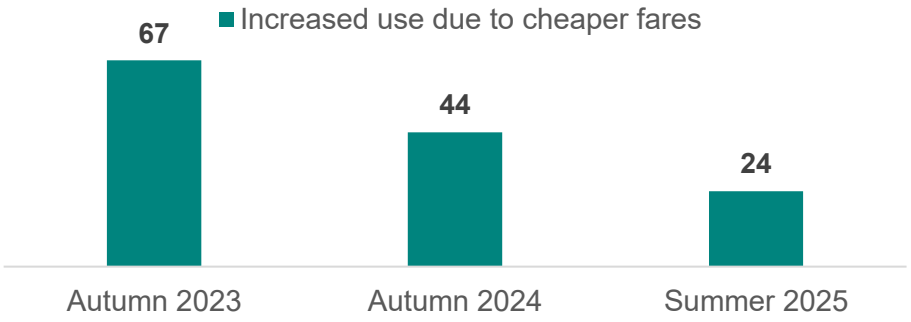
Local authority residents: 8% of Wakefield District residents had increased their bus use; this is a higher number than West Yorkshire overall, but after netting off respondents with decreased use, it cancels out to 0% of respondents. The worst areas for decreased use, based on respondents' home location, appear to be residents of Calderdale (-13% net) and of Kirklees (-11% net), though these figures were not significant within the sample size.

		Net Change	Base
	Summer 2025	-7%	2221
Gender	Male	-5%	1133
	Female	-8%	1085
Age Range	Age 19-25	-17%	339
	Age 26-35	-5%	484
	Age 36-45	-5%	481
	Age 46-55	-5%	464
	Age 56-65	-5%	427
Ethnicity	All White Ethnicities	-7%	1728
	All Other Ethnicities	-5%	480
Economic Status	Working	-6%	1672
	Unemployed	-9%	150
	In Education	-3%	112
	Looking after home/family	-15%	71
	Sick / Disabled / Retired	-7%	195
Health limits activities	No	-7%	1832
	Yes, a little	-6%	220
	Yes, a lot	-10%	156
Household cars / vans	None available	-5%	882
	One available	-6%	745
	Two available	-6%	440
	Three+ available	-21%	146
IMD Quintile	(Most deprived) 1	-7%	690
	2	-6%	388
	3	-5%	418
	4	-8%	380
	(Least deprived) 5	-6%	223
Home District	Bradford	-6%	482
	Calderdale	-13%	194
	Kirklees	-11%	406
	Leeds	-7%	742
	Wakefield	0%	332
	Visitor	9%	64

Section F: Respondents with Increased Bus Use[3]

15. Reasons for more bus use

In the autumn 2023 online survey, there was a simple question as to whether increased use was due to fares. In the autumn 2024 and summer 2025 surveys, an option on fares was one of various choices, though respondents could choose all that were applicable.



Question C1: Is increased use due to any of the following? **Base**: using buses more / started using the bus / using buses the same frequency but for longer distances. Summer 2025 excludes respondents who had recently moved into West Yorkshire, for whom it may be assumed that 'new home' is the main reason.

Concentrating on the summer 2025 survey wave:

- **24%** included that it is cheaper than the alternatives in their reasons. **9%** only selected cheaper fares, while **16%** selected cheaper fares alongside other reasons. The comparator option in autumn 2024 was 'cheaper fares', which was selected by **44%**, with **30%** selecting only that reason and **14%** selecting that reason alongside other reasons.
- **6%** selected one or more service delivery reasons (compared to **8%** in autumn 2024).
- **84%** selected 'Other reasons' (compared with **59%** in autumn 2024). The question was asked in three parts in this survey wave, 7% of respondents selected new home, 33% selected a new place of work or study. 40% of respondents selected 'other' as the sole reason without an explanation of what the 'other' was.

Reasons for using bus more (% of respondents)	Total	Use more	Started using	Use the same but longer distance
Cheaper than the alternatives	**24%**	**26%**	**20%**	**29%**
Improved reliability and punctuality	3%	4%	0%	6%
More buses in the timetables	5%	6%	0%	10%
Nicer buses	1%	2%	0%	0%
Concern for the environment	8%	11%	0%	14%
Other reasons	84%	85%	86%	78%
New home	7%	6%	5%	13%
New place of work/study	**33%**	**41%**	**24%**	**30%**
Other	49%	43%	60%	47%
Don't know	2%	2%	0%	5%
Sum	127%	135%	106%	142%
WEIGHTED BASE	*94*	*45*	*32*	*18*

Question C1: Is increased use due to any of the following? **Base**: using the bus more / started using the bus / using the bus some but for longer distances. Excludes people who moved into West Yorkshire. Respondents could select multiple statements, or don't know, therefore the total selection is greater than 100%.

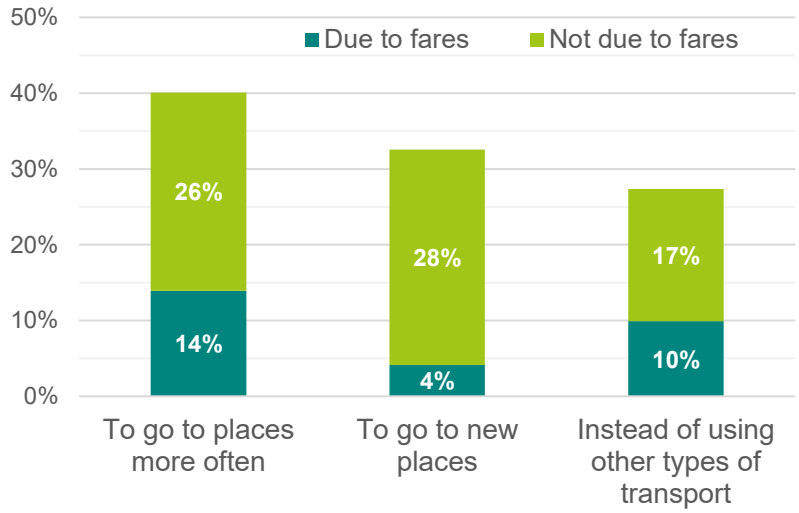
[3] In this section respondents who said that, over the last couple of years, they use buses more, or have started using buses, or that their level of use is the same but for longer distances are all included as increased use.

16. Destination Horizons

Respondents who were using buses more, or who had started using buses, and lived in West Yorkshire before the fare increase, were asked what **best described** their **extra** bus journeys. The response options were in general terms.

- **57%** of responses said that extra bus use was to go to places more often (compared with 38% in autumn 2024),
- **52%** were to go to new places (compared with 27% in autumn 2024),
- **38%** To go by bus instead of how I used to get to places (comparator option in autumn 2024 was 'instead of using other types of transport' at 27%).

These responses are not directly comparable with the autumn 2024 responses as there were various changes in how the question was asked. [4]



Question C2: Using the bus more / started using bus: What best describes this extra bus use? Weighted base 74. If just one statement was selected it was added as a full response, if two statements were selected they were each added as half the response, etc. This method ensures the total response adds up to 100%.

17. Mode switch to bus

The respondents who said that their increased bus use was to go by bus instead of how they used to get to places were asked a supplementary question about what modes they used previously. The routing to this question only elicited 28 responses. From these responses about switching, it appears that about

- 44% of switching was from car,
- 22% from taxi,
- 21% from train, and
- 14% from pedestrian walking / wheeling.
- 0% was from motorbikes, motor scooters, or pedal cycles

[4] The changes in 2025 were to allow multiple responses, to replace an option 'Instead of using other types of transport' with 'To go by bus instead of how I used to get to places', to remove an option 'to travel further afield' as that seemed to be a subset of 'to go to new places'. The base was changed to include people travelling a longer distance by bus even if their frequency of use, measured in days, was the same but people who did not live in West Yorkshire before were excluded. The main aim of these changes was to give greater clarity to whether the choices included mode shift.

Section G: Respondents Using Buses the Same as Before

18. Why some respondents are using the bus the same amount as before

Amongst respondents who are using the bus the same amount as before, **16%** say that Mayor's Fares have encouraged them to keep using buses, compared with 26% in autumn 2024. 16% say they don't think Mayor's Fares save them money, compared with 9% in autumn 2024, while **67%** say price isn't the main reason behind their choice.

	Autumn 2024	Summer 2025
I don't think Mayor's Fares save me money	9%	16%
Mayor's Fares have encouraged me to keep using buses	**26%**	**16%**
Other (please specify)	1%	1%
Price isn't the main reason behind my choice on bus use	64%	67%

Question C5. You have said you are using the bus the same amount as before Mayor's Fares. Which of the following statements best reflects your view? Weighted base: 933 completed responses.

- Regular bus users appear most likely to say that Mayor's Fares have encouraged them to keep using buses, particularly those who use buses 1 to 3 days per week (**27%**). This is an interesting, subtle shift from autumn 2024, when the most likely to say so were those who used buses 5 days per week.
- Regular bus users also appear most likely to say that they don't think Mayor's Fares save them money, particularly **30%** of those who use buses six or seven days per week.
- Looking at ticket choice, 155 respondents said they had bought a week ticket in the last 12 months, and **26%** of these respondents don't think Mayor's Fares save them money.
- Surprisingly, **24%** of respondents who said they used to buy day tickets but now buy singles don't think Mayor's Fares save them money
- **78%** of occasional users and **85%** of rare users showed that price isn't the main reason behind their choice on bus use.

Section H: Respondents Using the Bus Less or Who Never Use Buses

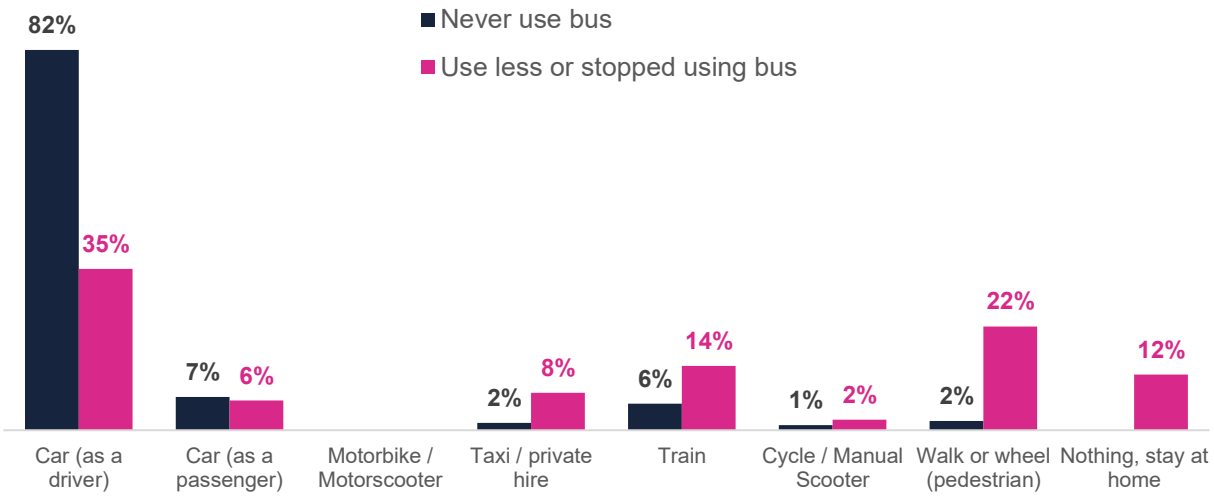
19. Mode of transport that respondents use instead of bus

Considering respondents who never use bus:

- 82% travel as a car driver instead. Overall results were similar in the autumn 2024 survey, suggesting that the samples could be combined for a more statistically robust sample.

Considering respondents who use the bus less or have stopped using bus:

- 35% drive a car instead, similar to the autumn 2024 result, though there were no significant differences by age.
- 22% walk or wheel instead - this was significantly more common from households without access to a car or van at 38%, whereas from households with two or more cars it was just 2%.
- 12% do nothing and stay at home instead: Groups that appear more likely to stay at home include those with no household access to a car or van at 22%; those whose health impacts day-to-day activity at 42%; and the two less deprived IMD quintiles at 14% (compared with the more deprived quintiles at 5%). Only 4% of respondents in employment said that they would stay at home instead.



C6. When you don't use a bus, what are you doing instead?
Weighted base: Never use bus 468, stopped using bus 225.

20. Reasons some respondents use buses less, or have even stopped using buses

There isn't a clear simple answer to why respondents use buses less, although it appears that the fares increase is the biggest reason for the recent reduction in use (41%), while improvements in the availability of other options is the biggest reason for stopping using buses (44%). Responses such as getting a car are included in the options for other transport have improved.

2025 Survey	Use Less	Stopped using	Total
Bus fares have increased	**41%**	5%	30%
Bus reliability / punctuality problems	14%	15%	14%
Bus services have been reduced or withdrawn	4%	4%	4%
Bus over-crowded / not comfortable	1%	2%	1%
I have less need to go places	22%	19%	21%
My health has made it harder to use buses	4%	0%	3%
My options for other transport have improved	6%	**44%**	18%
Other	8%	12%	9%
Total	100%	100%	100%
Weighted Base	*152*	*73*	*225*

Question C7. You have said you are using the bus less often, which of these options best explains why?

- 36% of respondents aged 19-25 who answered this question said options for other transport have improved, significantly more than the 18% overall.
- 36% of respondents from the two most deprived IMD quintiles said that they use less because bus fares have increased, compared with just 13% from the two least deprived IMD quintiles.

21. Factors that could encourage respondents to use bus more

Respondents who currently never use a bus, or who are using buses less and using other motorised road transport more, were asked what could encourage them to use bus, or to use bus more.

The top factor that could encourage people to use bus more came out as reliability at 32% of respondents (up from 28% in autumn 2024), particularly 61% among those who use buses less or have stopped using buses. This was followed by improved frequency at 22% (similar to autumn 2024) and with lower fares (than they are now) coming third at 18% (up from 8% in autumn 2024). Notably 67% of respondents who use buses less said lower bus fares would encourage them to use buses more, but only 14% of those who had stopped using buses said this.

There was a sizeable proportion of responses stating that nothing could encourage the respondent to use buses more, particularly 64% among those who have not used buses for years (compared to 71% in autumn 2024).

Respondents aged 19-25 were:

- More likely than the sample overall to say that something would encourage them (72% c.f. 50% overall, a 22%-point difference, which is similar to a 19%-point difference seen in autumn 2024).
- More likely than the sample overall to select improved reliability (46% c.f. 32%), this 14%-point difference appears less than in autumn 2024, when the difference was 22% points.
- Unlike in autumn, not significantly more likely than the overall sample to select improved frequency
- Were more likely to select lower bus fares (34% c.f. 18% overall). The 34% of respondents in this age bracket is a significant increase from 14% in autumn 2024.

Respondents from white ethnic backgrounds appear more likely than respondents from other ethnicities to say improved reliability and/or improved frequency would encourage them, while respondents from other ethnicities were more likely to say lower fares (30% other ethnicities c.f. 16% white ethnicities) would encourage them.

Unemployed respondents were much more likely than others to say lower fares (59% c.f. 18% overall).

Respondents from households without access to a car were the most likely to say that lower bus fares would encourage them to use buses more (56%, up from 22% in autumn 2024), while those with three or more cars were more likely to say improved frequency (27%, down from 34% in autumn 2024) or improved reliability (49%, up from 40% in autumn 2024).

What could encourage you to use bus more? (% of respondents) Summer 2025	Total	Not used for years	Use less	Stopped Using
Improved reliability	32%	23%	48%	**61%**
Improved frequency	22%	15%	39%	37%
Lower bus fares (than they are now)	18%	6%	**67%**	14%
Improved personal safety	9%	8%	8%	16%
Improved journey information	4%	3%	7%	1%
Higher costs of motoring	2%	2%	1%	0%
Environmental concerns	1%	0%	2%	0%
Other (please specify)	9%	8%	11%	9%
Nothing	50%	**64%**	11%	24%
Sum	147%	131%	195%	163%
WEIGHTED BASE	*666*	*468*	*125*	*73*

Question E1. What would encourage you to switch from your current transport to bus travel? Select up to three options

22. Purpose of Travel

Respondents who had either increased or decreased their bus use were asked about their purpose of travel. As described in section E (paragraph 12), the survey found a net 7% of respondents using buses more, with about 2% of reasons due to fares. Looking at journey purpose, out of the 7% net loss, 2.6% was from travel to work, college, or similar, 2.6% from leisure activities out and about, 0.5% from visiting family or friends, 1% from going shopping, and 0.4% other.

Question C1: You have said you are using the bus more in West Yorkshire, is this due to any of the following? **Question C4:** What sort of activities is this extra bus use for? **Question C7:** You have said you are using the bus less often or stopped using the bus, which one of these options best explains why? **Question C8:** What sort of activities are you doing less of by bus? **Base:** 2,221 (All respondents). In both question **C4** and question **C8,** respondents could select up to two statements. If just one statement was selected it was added as a full response, if two statements were selected they were each added as half the response, this method ensures the total response adds up to 100%.

Section I: Ticket choice and willingness to pay

23. Use of Mayor's Fares and of weekly tickets priced to fit with Mayor's Fares

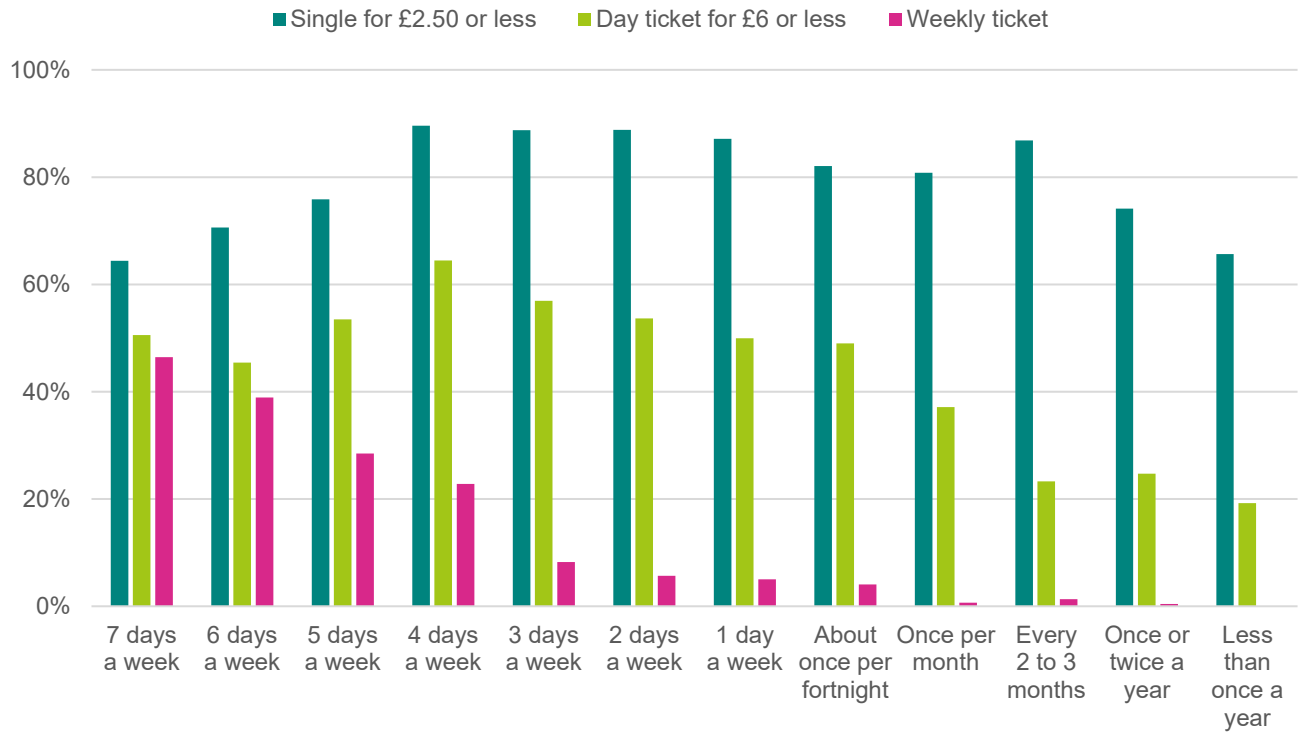
All respondents who use a bus, even if less than once a year, were asked about tickets they have used in West Yorkshire in the last year:

- **80%** of respondents have used a £2 single
- **49%** have used a day ticket costing £5 or less
- **91%** have used at least one of the above tickets
  (or **69%** of all respondents, including those who never use a bus)

Weekly bus tickets are also of some interest as the price of these is aligned with changes in the day ticket price.

Weekly bus tickets are clearly most used by respondents who travel 7 days a week (46% of respondents) through to 4 days a week (23% of respondents), with some use by other regular and occasional bus users.

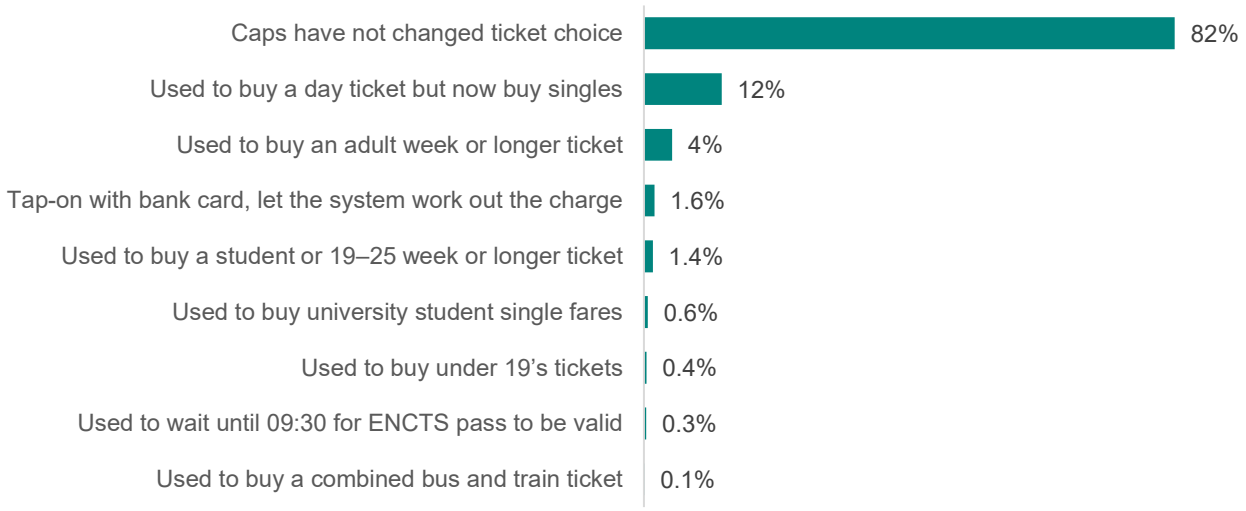
15% of respondents who use a bus less than once a year did not select any tickets used in the last year.



Question E2. Have you used any of the following bus fares in West Yorkshire in the last 12 months?
Weighted Base 1,680

24. Changes to ticket choice

Respondents who said that they'd bought a single for £2.50 or less, or a day ticket for £6 or less, were asked about how the fare increase impacted their ticket choice. 82% of respondents said the increase had not changed their ticket choice, while 12% used to buy day tickets but now buy singles, and 4% who used to buy an adult week or longer ticket are buying day tickets or singles.



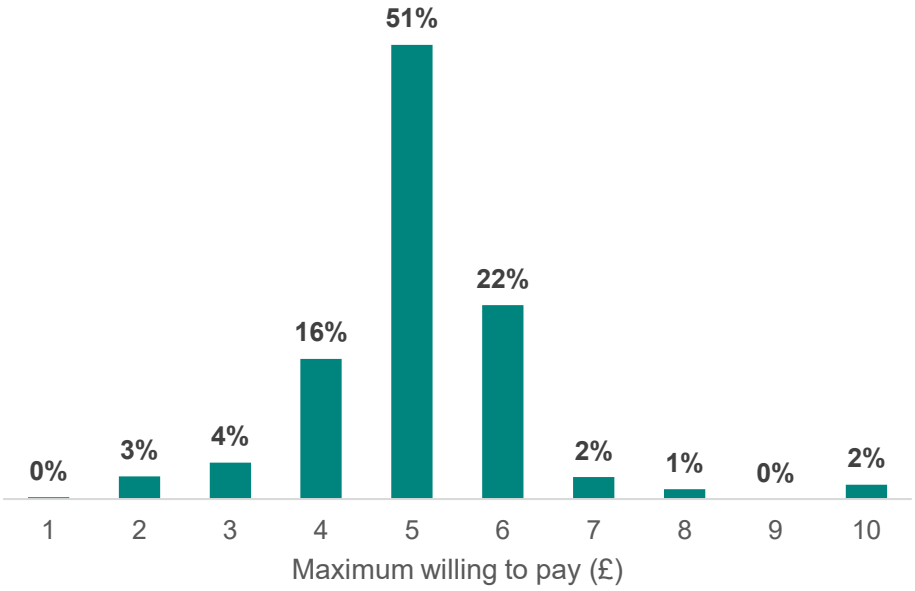
Question E3. Have fare increases impacted the type of ticket that you buy? Please select all that apply. **Base** 1,532.

25. Willingness to pay for a day ticket

When asked about what the most they would be willing to pay for a West Yorkshire day ticket, **73%** of people who expressed an opinion said **£5** or less, **22%** said **£6,** and **5%** said **£7 or more**.

More people were willing to pay £6 for a day ticket in summer 2025 (22%) than in autumn 2024 (6%). There was no increase in people willing to pay £7 or more for a day pass.

The mean fare suggested worked out at **£5.07** per day. Respondents who agreed that they could afford to travel by bus whenever they wanted averaged **£5.26,** while those who disagreed averaged **£4.52.** Respondents in full-time education averaged **£4.66**; it is plausible that some of these respondents may have been considering a student discount.



Question E4. What is the most you would be willing to pay for an all-day ticket for travel on any bus in West Yorkshire? Weighted base 1194

Section J: Agreement with Sentiments

*Tables in this section show the **change** in **total who agree** from autumn 2024 to summer 2025, through various groupings of respondents, for each of the statements:*

- *I **understand** how much it costs to catch a bus in West Yorkshire*
- *The fare cap makes it easier for me to make **multiple bus journeys** on the same day*
- *I can **afford** to travel by bus in West Yorkshire whenever I want to*
- *The fare cap encouraged me to participate in more **leisure** activities*
- *The fare cap improved my ability to **access job** opportunities or consider employment further from home*

***Total who agree** is the sum of those who strongly agree and those who agree. Shading is from bright red, showing the largest decrease (around -40%) to dark teal, showing the largest increase (around 10%).*

26. Agree by gender and ethnicity

	Under-stand	Multi-Journeys	Afford	Leisure	Access Jobs
Whole Sample	-6%	-19%	-6%	-18%	-24%
Male	-5%	-16%	0%	-14%	-21%
Female	-7%	-23%	-12%	-22%	-27%
All white ethnicities	-6%	-19%	-6%	-15%	-22%
All other ethnicities	-3%	-22%	-6%	-28%	-31%

- The tables in this section show the autumn 2024 to summer 2025 change in the percentage of respondents who agreed with the statement.
  Section D described overall results. For example in autumn 2024 there were 79% of respondents who strongly agreed, or agreed, with the statement "*I **understand** how much it costs to catch a bus in West Yorkshire***". This had reduced to 73% who agreed or strongly agreed in summer 2025. The change is therefore -6% and that change is shown in the 'Whole Sample' row of the '**Understand**' column of this table, followed by rows showing changes for various groupings of respondents.
- 12% fewer females agreed "*I can **afford** to travel by bus in West Yorkshire whenever I want to*" than in autumn 2024, but there was no change in males agreeing. Females appear more likely to have reduced their agreement across the other statements, although the affordability statement is the only one where the difference is statistically significant. In autumn 2024, there had been no statistically significant gender differences in responses to the statements.
- Comparing ethnicities, the biggest disparities in change were in the leisure and access to jobs statements. People of white ethic background dropped from 49% to 34% (-15%) agreeing with the leisure statement, and from 45% to 23% (-22%) agreeing with the access to jobs statement. People from other ethnicities dropped from 62% to 34% (-28%) agreeing with the leisure statement, and from 59% to 28% (-31%) agreeing with the access to jobs statement. All four of these drops were statistically significant.

27. Agree by age, economic status, and health outcomes

	Under-stand	Multi-Journeys	Afford	Leisure	Access Jobs
Whole Sample	-6%	-19%	-6%	-18%	-24%
Age 19-25	-6%	-33%	-13%	-20%	-33%
Age 26-35	-6%	-24%	-2%	-24%	-30%
Age 36-45	-4%	-16%	-10%	-22%	-22%
Age 46-55	-2%	-10%	-2%	-11%	-18%
Age 56-65	-9%	-15%	-3%	-12%	-21%
Working 30 hours or more	-4%	-15%	-3%	-14%	-17%
Working less than 30 hours	-14%	-31%	-1%	-28%	-42%
Unemployed	1%	-15%	-7%	-4%	-17%
In Education	-3%	-36%	-25%	-29%	-42%
Looking after home / family	-5%	-25%	-14%	-26%	-36%
Sick / Disabled / Retired	-4%	-13%	-18%	-19%	-15%
Health doesn't limit activities	-6%	-21%	-6%	-16%	-21%
Health limits activities a little	2%	-9%	1%	-25%	-41%
Health limits activities a lot	-11%	-19%	-12%	-29%	-26%

- Agreement with the access to jobs statement appears to have worsened more for those aged 19 to 35 than for those aged 36 to 65.
- Economic status appears to have been a greater influence than age for changes in agreement. Notably, those working part-time (less than 30 hours per week) and those in education had a larger reduction in agreement on the access to jobs statement than respondents who were in full-time work or unemployed.
- In the previous survey, part-time workers were significantly more likely than the overall sample to say that they understood how much it costs to catch a bus in West Yorkshire. Their understanding has dropped significantly from 86% to 72% agree and is now on a par with the population overall.
- As in the previous survey, respondents in education were more likely than the overall sample to agree that they understood how much it costs to travel by bus in West Yorkshire.
- Respondents whose health limits day-to-day activities a little dropped significantly from 56% agreeing with the access to jobs statement to just 15% agreeing. Conversely, their agreement with understanding how much it costs and agreement with being able to afford to travel by bus in West Yorkshire whenever they want to appear to have increased, though these increases are not statistically significant.

Appendix A – Weighting Report from DJS

The following notes were provided by consultant DJS to describe tests and weighting.

BSIP Fares Initiative Wave 2 – 2025

The sample of participants are aged 19+ who pay for bus travel (e.g. excluding those 65+ who have a bus pass or those with a disability).

The sample includes residents of West Yorkshire (around 97% of the sample) and a smaller number of visitors to the area who pay for bus travel (n=64).

We want to ensure that the profile of the bus users matches that of the local population to ensure that our findings give voice to all the different bus user groups.

The proportion of respondents within each Local Authority matches well with the population.

WY residents	Sample	Population	
Bradford	24%	23%	The sample matches well in terms of the Local Authority – the very slight under sample in Leeds/ over sample in Calderdale/Kirklees is corrected through weighting.
Calderdale	10%	8%	
Kirklees	20%	18%	
Leeds	32%	36%	
Wakefield	14%	15%	

Each participant from WY who gave a full or partial postcode that allows for classification is assigned to the IMD quintile (in total, 95% of all respondents gave a classifiable postcode, 114 WY respondents either refused or provided incorrect/unclassifiable details).

The profiles of the sample, within each Local Authority, are compared to the population in terms of IMD quintile.

	IMD quintiles	Sample	Population	
Bradford	1 - most deprived	60%	44%	Sample is broadly in line with the population in Bradford (in that the majority of both the sample and population are in the lowest quintiles) but the sample has significantly fewer respondents in quintiles 4 & 5
	2	26%	22%	
	3	9%	13%	
	4	3%	12%	
	5 - least deprived	1%	9%	
Calderdale	1	35%	28%	Sample is a good match with population within Calderdale.
	2	31%	23%	
	3	18%	23%	
	4	12%	20%	
	5	4%	6%	
Kirklees	1	47%	29%	Sample has a greater proportion in the most deprived quintiles compared to the population – this is corrected through weighting.
	2	22%	21%	
	3	14%	17%	
	4	11%	21%	
	5	7%	11%	

	IMD quintiles	Sample	Population	
Leeds	1	40%	34%	Sample is broadly in line with the population in Leeds – again we see a greater proportion in the most deprived quintile and fewer in the least deprived
	2	19%	13%	
	3	18%	18%	
	4	15%	20%	
	5	7%	15%	
Wakefield	1	39%	35%	Sample is a good match to the population within Wakefield.
	2	31%	24%	
	3	13%	16%	
	4	12%	16%	
	5	6%	9%	
ALL WY	1	46%	35%	Across all WY we see a fairly good match to the population – deviations can be corrected through weighting.
	2	24%	19%	
	3	14%	17%	
	4	11%	18%	
	5	5%	11%	

Note – to avoid any extreme weights, the 2 least deprived quintiles (4&5) are combined within the samples in Bradford).

We also consider age and gender of the sample of participants. Gender within each LA is a really good balance of men and women and is very close to the adult population in terms of gender.

Area	Gender	Sample	Population	
Bradford	Male	51%	49%	The gender profile of the sample interviewed in each area matches well with the local population – very slight weight required to ensure parity
	Female	49%	51%	
Calderdale	Male	53%	49%	
	Female	47%	51%	
Kirklees	Male	51%	49%	
	Female	49%	51%	
Leeds	Male	54%	49%	
	Female	46%	51%	
Wakefield	Male	50%	49%	
	Female	50%	51%	

Age within each LA is also a really good match to the adult population.

	Age band	Sample	Population	
Bradford	Age 19-25	20%	15%	Sample is in line with the population in Bradford – a slightly higher proportion of younger respondents
	Age 26-35	23%	23%	
	Age 36-45	24%	23%	
	Age 46-55	19%	20%	
	Age 56-65	15%	19%	
Calderdale	Age 19-25	15%	12%	Sample is a good match with population within Calderdale.
	Age 26-35	22%	21%	
	Age 36-45	20%	22%	
	Age 46-55	21%	23%	
	Age 56-65	23%	23%	

	Age band	Sample	Population	
Kirklees	Age 19-25	11%	14%	Sample is in line with the population in Kirklees – a lower proportion in youngest age group.
	Age 26-35	22%	22%	
	Age 36-45	26%	22%	
	Age 46-55	24%	22%	
	Age 56-65	18%	20%	
Leeds	Age 19-25	21%	20%	Sample is a good match with the population within Leeds.
	Age 26-35	24%	23%	
	Age 36-45	18%	21%	
	Age 46-55	17%	19%	
	Age 56-65	19%	17%	
Wakefield	Age 19-25	19%	11%	Sample is a fairly good match to the population within Wakefield – greater proportion of younger people
	Age 26-35	34%	23%	
	Age 36-45	19%	22%	
	Age 46-55	14%	22%	
	Age 56-65	14%	22%	
ALL WY	Age 19-25	18%	16%	Across all WY we see a good match to the population – the very slight deviations are corrected through weighting.
	Age 26-35	25%	23%	
	Age 36-45	21%	22%	
	Age 46-55	19%	21%	
	Age 56-65	18%	19%	

A **RIM weighting** is applied including all of the above factors. Rim weighting takes into account all of the different factors. It's a bit like "spinning plates", we start with the first factor, IMD and weight according to this factor – then, we take the IMD-weighted data and apply a second weight to correct for age profile – then we take the IMD & Age weighted data and apply a third weight to correct for gender and then again for LA population – BUT now that we made the sample balanced in terms of LA population we find that the first factor, IMD, is no longer perfectly balanced so we re-balance for this factor… then cycle through all the different factors again and again until we get to a point where we can't improve how close we are to the population.

The RIM weighting ensures that the interviewed sample matches the profile of the population in terms of LA, IMD, gender and Age within LA.

Weighting quality check

Weighting efficiency is a measure of the strength of the weights applied to the interviewed sample in order to match the local population. Efficiency runs for 0% thru to 100%. Efficiency of 100% means that the sample matched the total profile exactly and no weighting was required. The higher the efficiency score, the closer the samples match. An efficiency score which is greater than 70% is deemed to be fit for purpose.

The weighting efficiency for the West Yorkshire sample is **81.7%** which is greater than the cut-off-point of 70%, hence the weighting is fit for purpose.

In addition to weighting efficiency, it is also important to look at the actual size of the weights. There are several basic rules:

- No weights should be above 5.0 or close to zero
- The percentage of respondents with a weight greater than 3.0 should be less than 5% of the sample
- The average weight for outliers (>2.0) should not exceed 3.0

The maximum weight is 3.11.

The weighting system does not have any weight >5.0 and just 4 cases (<0.5% of the sample) have weights that have a value >3.0 and the average of outlier weights is 2.43. Therefore, our weighting system upholds all rules necessary for a weighting system to be fit for purpose.

Secondary factor – Bus stop data

We can match, via postcode, bus stop data to our sample – in total 239 people so 11% of our WY sample (so, excluding the people out of area) were unable to match to bus stop data since they either refused to give their postcode or gave a partial/unclassifiable postcode.

Distance to nearest bus stop with at least 4 buses per hour	ALL postcodes	Sample	
Within 100m	16.5%	18.4%	Fewer people are living more than 800m from a bus stop in our sample and a greater proportion are living between 100m and 200m compared to the population.
Between 100 and 200m	20.6%	27.0%↑	
Between 200 and 400m	22.8%	26.1%	
Between 400 and 800m	18.2%	16.7%	
More than 800m	21.9%	11.8%↓	

A final RIM weight is applied that corrects for all of the primary factors PLUS the distance to high frequency bus routes.

Weighting quality check – final weight

The final weighting efficiency for the West Yorkshire sample is **76.0%** which is greater than the cut-off-point of 70%, hence the weighting is fit for purpose.

In addition to weighting efficiency, it is also important to look at the actual size of the weights. There are several basic rules:

- No weights should be above 5.0 or close to zero
- The percentage of respondents with a weight greater than 3.0 should be less than 5% of the sample
- The average weight for outliers (>2.0) should not exceed 3.0

The maximum weight is 3.87.

The weighting system does not have any weight >5.0 and just 33 cases that have a value >3.0 (that's 1.5% of all cases) and the average of outlier weights is 2.57. Therefore, our weighting system upholds all rules necessary for a weighting system to be fit for purpose.

Ethnicity – comments

If we look at the broad ethnicity of White British vs Ethnic Minority Groups (EMG), we see that the sample (weighted as above to match the WY profile) is pretty much in line with the population profile.

Area	EMG Group	Sample	Population	
Bradford	White British	60%	56%	The sample is in line with the population – for example residents from Bradford are most likely to be from EMG backgrounds whilst Wakefield and Calderdale tend to be White British
	EMG	40%	44%	
Calderdale	White British	91%	82%	
	EMG	9%	18%	
Kirklees	White British	76%	70%	
	EMG	24%	30%	
Leeds	White British	72%	72%	
	EMG	28%	28%	
Wakefield	White British	82%	87%	
	EMG	18%	13%	
ALL WY (age 19-65)	White British	73%	71%	Overall, a good fit to the WY population in terms of ethnic group
	EMG	27%	29%	

The data could be split within LA to report differences at the broad EMG vs White British level but not divided within LA into the more nuanced/detailed ethnic groups.

At a total WY level, we could investigate the differences within the different groups with Asian and Black being the two largest groups represented in the WY area – we did not collect deeper detail (e.g. Pakistani or Indian) so no comparisons at this level could be investigated. In past research conducted specifically in the Bradford area, we've set quotas on specific ethnic groups to better understand the differences and similarities within Pakistani/Bangladeshi communities so this would be something to consider for future surveys in the area.

Ethnic group	% WY total
Asian, Asian British	10%
Black, Black British, Caribbean or African	9%
Mixed or multiple ethnic groups	2%
White British, Northern Irish	73%
White other	5%
Other ethnic group	1%

Find out more

westyorks-ca.gov.uk

West Yorkshire Combined Authority

Wellington House
40-50 Wellington Street
Leeds
LS1 2DE

All information correct at time of writing

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire