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**Report to:** Leeds City Council Scrutiny Board (Infrastructure, Investment and Inclusive Growth)

**Date:** 27/11/2024

**Subject:** **Advancing Bus Provision**

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**Director:**

**Author:**

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Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1. This report provides an update regarding the ongoing activities by the Combined Authority to advance bus provision across West Yorkshire and Leeds.
- 1.2. This report summarises issues reported to meetings of West Yorkshire Combined Authority and its Transport Committee.

## 2. Information

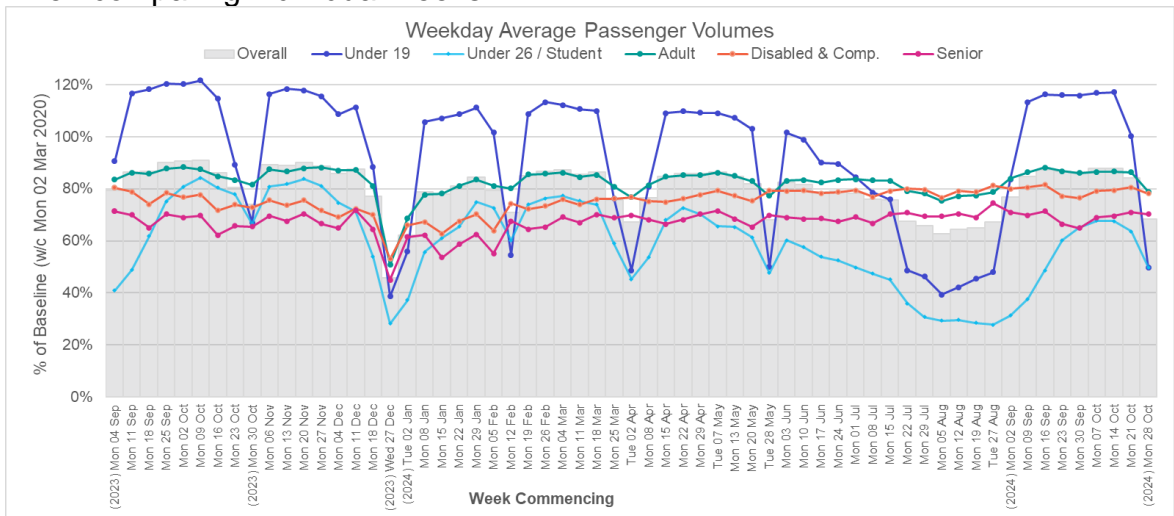
### **Patronage trends and the associated consequences for revenue**

- 2.1. Overall bus patronage in early October 2024 (before school half term) stood at 88% of pre-pandemic levels (March 2020), slightly lower than the same period last year (92%). This year-on-year difference in overall patronage appears to be largely (but not exclusively) driven by a decline in bus use by the Under 26/student cohort during this period (as shown in the table below).

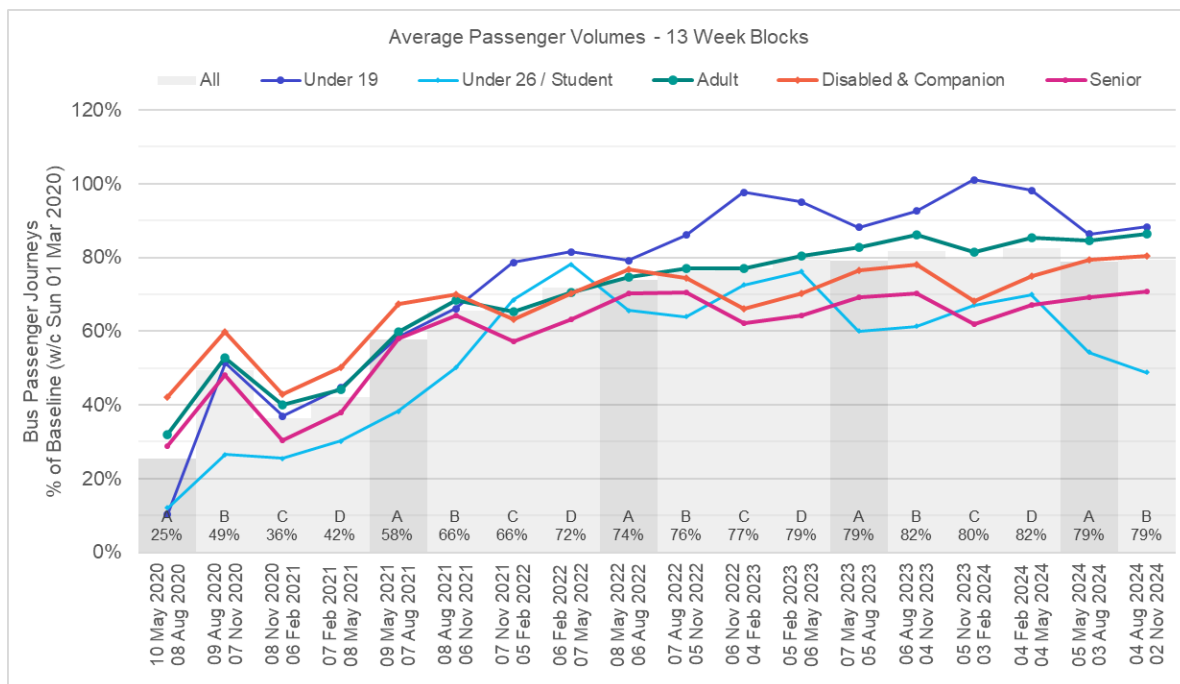
<p><b>Patronage as a Percentage of the week commencing Sunday 01 March 2020 (the pre-COVID baseline restrictions week)</b></p>
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Whole Week	Under 19	Under 26 / Student	Adult	Disabled & Comp.	Senior	Overall
Sun 08 to Sat 14 October 2023	124%	87%	91%	79%	71%	92%
Sun 06 to Sat 12 October 2024	119%	69%	89%	80%	70%	88%

2.2. Bus patronage follows a seasonal pattern, as illustrated in the chart below which shows weekday patronage over the last year. Patronage is affected by statutory holidays, the academic term, school inset days, unusual/extreme weather, as well as industrial disputes (most obviously bus drivers but also rail operating staff, teachers, and others) so this context should be considered when comparing individual weeks.



2.3. The chart below provides a more strategic view of longer-term bus patronage trends since the pandemic. The chart shows thirteen-week periods of Sunday to Saturday patronage data to smooth out short-term impacts such as holidays and weather events, and also applies smoothing to allow for variations in statutory holidays. Over the last 13 weeks, bus patronage has averaged at 79% of baseline (pre-pandemic levels), which compares to 82% last year. This longer-term comparison illustrates the recovery trajectory since the pandemic, and the most recent trends, if sustained, indicate that post-COVID recovery in bus patronage is slowing.



2.4. Spatial analysis of bus patronage data reveals that the largest year-on-year differences are on routes that serve central Bradford. It is likely that a combination of the emergency closure of Bradford Interchange on 4 January 2024 and wider ongoing capital programme works in the city centre have impacted on demand.

### **Fare simplification including an update on the impact of the Mayor's Fares**

- 2.5. West Yorkshire was the first area in England to introduce a bus fare cap as the Mayor's fare at £2 which was established in September 2022 with a DaySaver at £4.50. This bus fare cap was introduced to help make travel around the region easier and cheaper and to help people with the cost-of-living crisis. The West Yorkshire £2 fare cap (Mayor's Fares) was introduced ahead of the introduction of a national bus fare cap, also at £2, funded by the Department for Transport (DfT), which was introduced in January 2023.
- 2.6. As part of the Autumn Budget, the national bus fare cap scheme is to move to £3 from 01 January 2025 and run to the end of December 2025. As part of the same announcement, DfT confirmed a national allocation for Bus Service Improvement Plan (BSIP) of £640m for financial year 2025/26, and at the time of writing, the CA is awaiting confirmation from DfT as to its allocation.
- 2.7. The CA and the Mayor have previously agreed to retain the £2 fare cap until the end of March 2025. As the CA is not part of the national fare cap scheme and needs to fund its costs locally, a decision needs to be taken on the fare from April 2025. As we do not yet know our BSIP allocation for 2025/26, we are working on scenarios which consider the affordability of various price points (e.g. £2, £2.50, £3) relative to other demands on BSIP funding including network protection and Safer Travel Team resourcing (amongst others).

- 2.8. The Mayor's Fare for single fares also has relevance for the pricing of the DaySaver ticket and also for Under 19's fares. The plan is to agree a way forward on these at a Combined Authority meeting at the end of November.
- 2.9. There is then a need to set out a longer-term approach to fares and ticketing on bus which provides a bridge between the current commercial deregulated market and that under a franchised bus network. That work on producing a Fares, Ticketing and Retail Strategy forms part of the bus reform workstreams.

### **Service enhancements (e.g. launch of Superbus)**

- 2.10. To date in West Yorkshire there has been £24.1m approved through the Bus Service Improvement Plan (BSIP) to invest in services, including ongoing network protection, a rolling programme of enhancements and a number of 'Superbus' schemes developed in partnership with commercial operators.
- 2.11. The Leeds 'Superbus' scheme launched in September 2023 and has significantly enhanced the 60 (Aireline) service between Leeds and Shipley from every 30 to 20 minutes. The service has since seen passenger growth of c30%.
- 2.12. Through our network enhancement programme, since February 2024, the Combined Authority has funded the doubling of frequency of service 14 (Leeds – Bramley – Pudsey) from hourly to half hourly, which has already generated passenger growth of up to 80%.
- 2.13. We are also supporting evening enhancements on service 444/446 (Leeds – Rothwell/Carlton – Wakefield) providing a 30-minute frequency (from hourly). From July 2024 we are also supporting the enhancement of service 164 (Leeds – Micklefield – Sherburn) from two hourly to hourly, and evening enhancements on services 140/141 (Leeds – Pontefract) and 163 (Leeds – Castlefield) providing a 30-minute frequency (from hourly). However, some of these services which operated by Arriva are currently under review, due to their current driver shortage.
- 2.14. We have also introduced the new orbital service 9/9c (White Rose – Middleton – Seacroft – Horsforth – Pudsey – White Rose), which has created new direct links across the city, and reinstated previously withdrawn service 48 (Leeds – Wigton Moor) and evening journeys on service 62 (Leeds – East End Park).
- 2.15. We have also protected several services from further reductions or withdrawals through our network protection funding.
- 2.16. This includes retaining the current service provision on the Park and Ride services in Leeds. Operationally services continue to perform well, however the unpredictable traffic congestion in Leeds city centre can impact service reliability and punctuality. It is expected that this will be intensify as we approach Christmas.

2.17. There continues to be aspirations for enhanced services, particularly more early morning and weekend journeys. This is something the Park and Ride board are considering.

**Accuracy of real time information systems**

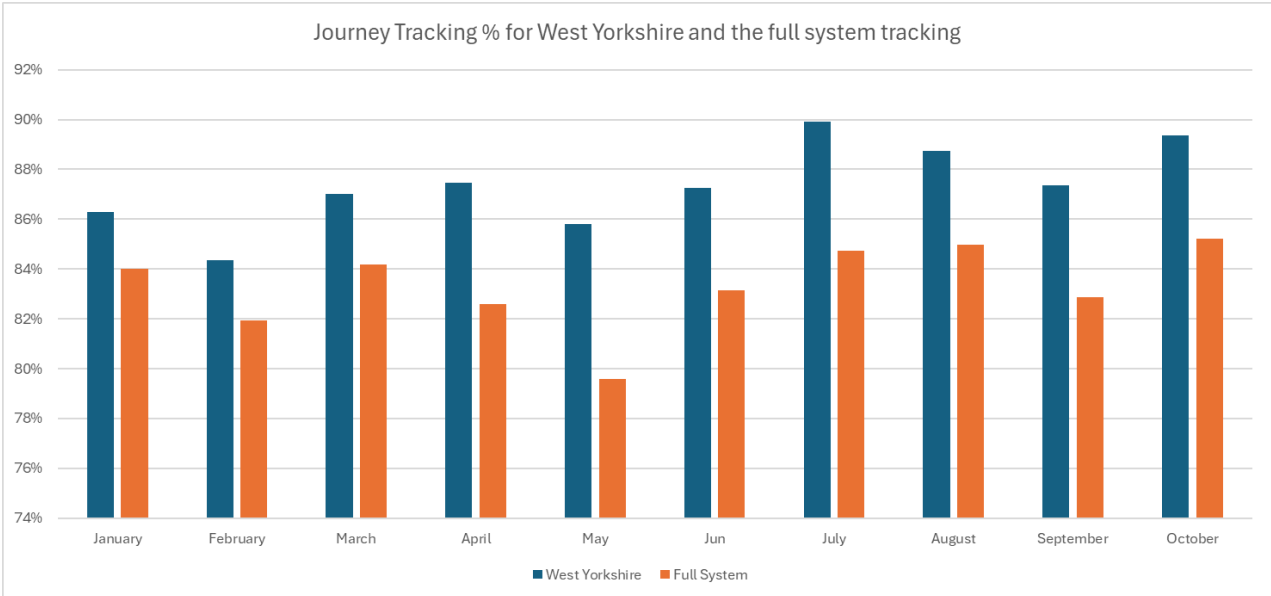
2.18. The greater Yorkshire real time system, of which West Yorkshire is one of the leading partners, along with SYMCA and City of York Council has been in operation for over 20 years. The system is geographically the biggest in the UK, with real-time service tracking as far south as Nottingham and Middlesbrough in the North and as far West as Manchester and to the East Coast, we regularly have over 2,300 vehicles reporting into the system daily. In 2023 the system database over the 12-month period had just under 9.5m scheduled journeys, with 7.6m of those being tracked in the real time system, which was 82% of all journeys tracked (the system holds data for many small operators who can provide real-time AVL feeds).

**Leeds City region**

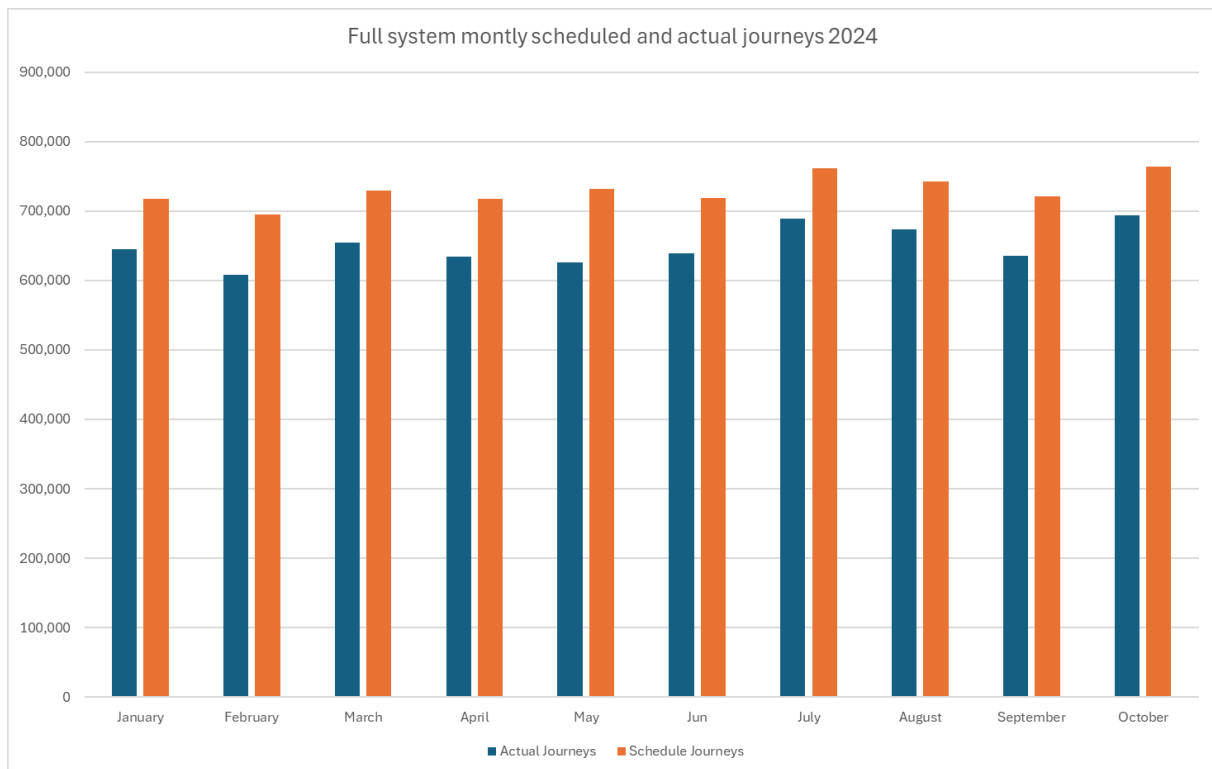
2.19. The main operators, First, Arriva and Transdev in the region consistently journey track in the high 80% and into the mid 90% mark daily.

2.20. WYCA and its partners are reliant on both service data, AVL positional data and cancellation inputs from the operators back-office systems for the provision of the real-time data feed. The quality of these data sources has an impact on the outputs for the real-time system specifically the on-street displays, of which there are currently 1,350+ in the Leeds City region, this being 64% of the real-time display estate.

**Tracking percentage of bus services for 2024 for West Yorkshire region**



**Scheduled to actual bus journeys in the real time system**



2.21. The issues experienced with real time information are largely due to the quality of data inputted into the system, and work is ongoing between the Combined Authority and bus operators to try address this. With the system covering the greater Yorkshire region there are several smaller operators who do not have the capability to provide AVL feeds – despite this being a DfT requirement since January 2021.

### **Measures of customer satisfaction**

2.22. The Combined Authority runs an annual survey to better understand West Yorkshire residents' perceptions and attitudes towards transport and infrastructure. This long running survey managed by the Transport Research, Analytics and Spatial Intelligence Team sits alongside other evidence such as the National Travel Survey (NTS), the National Highways and Transportation Survey (NHT), and the survey work by Transport Focus as well as empirical evidence on use of transport assets and services. A copy of the full report is published on the Combined Authority's [Data and Intelligence Hub](#).

2.23. The latest wave of this survey ran between January and March 2024, using a mix of telephone (1,250) and online (550) methods, achieving a total of 1,800 responses. Importantly, survey responses form a statistically representative sample of the West Yorkshire population aged 16 and over accounting for age, gender, district and ethnic group. There were 650 responses in the Leeds district. The headlines were:

- a) Overall mean West Yorkshire level satisfaction scores for local bus services in were **6.0** (out of 10), similar to last year (**5.9**), and this measure has been in decline since 2020/21 (**7.0** out of 10). Data for Leeds shows a

similar picture, with a score of **6.0** (out of 10) having declined from **7.0** in 2020/21.

- b) The mean score for satisfaction with the affordability of public transport at the West Yorkshire level continues to trend upward; up from **5.6** in 21/22 to **6.5** this wave. This is a statistically significant increase from last year (**6.2**). Again, data in Leeds follows a similar pattern with a score of **6.7** (out of 10) in the latest survey, up from **6.0** in 2020/21.
- c) **75%** of respondents reported being satisfied with the ease of buying a bus ticket in West Yorkshire, up from **72%** last year, and up from **65%** in 2019/20 (with a very similar pattern in Leeds). Additionally, **49%** of respondents were satisfied with the bus ticket price (**9%** were dissatisfied), up from **45%** last year.
- d) In Leeds **77%** of respondents reported being either very or fairly confident that they usually purchase the best value ticket, up from **72%** last year and **67%** in 2021/22. At the West Yorkshire level, those aged 16-34 years old and regular bus users were more likely to report being confident (**77%** and **88%** respectively).
- e) At the West Yorkshire level, talking to staff is still the most used method for buying a bus ticket; **58%** of respondents bought their last ticket this way, down from **77%** in 2019/20. Notably, this figure is lower in Leeds than the West Yorkshire average at **47%**. **40%** of Leeds respondents bought their last bus ticket using an app and overall, this is more popular among younger people aged 16 to 34 (**49%**) and those from an ethnic minority background (**46%**).
- f) The mean satisfaction score with travel centres was **7.4** (out of 10), a slight fall from last year (**7.7** out of 10). Over the last six years, **60%** of those from a White British background are satisfied with travel centres compared with only **49%** of those from an ethnic minority background. **64%** of those aged 65 and over are satisfied but this falls to **51%** of those aged 16 to 34.
- g) Mean satisfaction scores with electronic time displays at bus stations and stops in Leeds was **7.2** (out of 10), and this measure has been in decline since 2020/21 (**8.3** out of 10).
- h) At the West Yorkshire level, **32%** of respondents reported regularly using the bus (using the BSIP definition of 'at least once a week'), similar to last year (**31%**). In Leeds, self-reported regular bus use is higher at **40%**. At the Leeds and West Yorkshire level, self-reported regular bus use remains below pre-pandemic levels; in 2019/20 **39%** of respondents In West Yorkshire reported using the bus at least once a week.
- i) This research shows that bus use remains higher for residents in the most deprived neighbourhoods; over the last 2 years, **38%** of those living in the most deprived quintile reported regularly using the bus compared to only **26%** of those living in in the least deprived quintile.

- j) Overall in West Yorkshire, **87%** of respondents felt confident in their personal safety while using local buses during the day (**90%** in Leeds). However, this figure falls to **54%** when using local buses in the dark (**58%** in Leeds). Notably, there are considerable differences by gender, **68%** of men felt confident in their personal safety while using local buses in the dark, but only **41%** of women felt the same, a pattern observed in the last 3 years of this survey. A similar pattern is observed for perceptions of safety on the train.
- k) The survey also asked about the impact of perceptions of safety. Results aggregated over the last 3 years reveal that **42%** of female respondents said they had used a car or taxi instead of walking or cycling in order to avoid antisocial behaviour or because of fear of crime and **41%** had used a car or taxi instead of using a bus or train. Young people are more likely to change their mode choice to avoid antisocial behaviour or because of fear of crime. Half of women aged 16 to 34 had used a car or taxi instead of walking or cycling and **54%** had used a car or taxi instead of using a bus or train. Respondents who live in the most deprived areas, those who are disabled, and those other than of White British ethnicity are also more likely to change their mode choice to avoid antisocial behaviour or because of fear of crime.

2.24. Dedicated local transport research is complimented the national 'Your Bus Journey' survey managed by Transport Focus. The Combined Authority contributes financially to this to achieve a sample of 900 response from West Yorkshire residents in 2023. The Your Bus Journey survey captures perceptions of bus passengers (at bus stops and on-board buses) aged 16 years or older. It covers 34 participating local transport authorities (including a mixture of urban metropolitan, semi-rural and rural areas) and captured passenger experiences on 35,000 journeys in 2023. Data was weighted to be representative of the demographics of passengers by gender and age and journey time. A copy of the West Yorkshire report published on the Combined Authority's [Data and Intelligence Hub](#). The headline West Yorkshire results were:

- a) Overall, 73% of passengers in West Yorkshire said they were either very or fairly satisfied with their bus journey, lower than the England average (80%) and the lowest level of satisfaction out of the 34 participating Local Transport Authorities. Note that London did not participate in the survey and is therefore not included in the England average.
- b) Overall satisfaction with the bus journey in West Yorkshire was higher in the off-peak (77%) than in the peak (64%), and passengers with a free pass were more satisfied (77%) than fare paying passengers (70%).
- c) The most common positive themes taken from comments of satisfied passengers were related to punctuality and the bus driver (24% and 22% of comments respectively), whilst the most common negative comments from dissatisfied passengers were related to punctuality (44% of comments).



- d) 69% of passengers in West Yorkshire said they were either very or fairly satisfied with value for money, which compares to 67% in England. The largest influential factor in dissatisfaction with value for money was the quality of the service.
- e) 67% of passengers in West Yorkshire rated the cost of bus fares as either very good or fairly good, notably higher than the England average (61%).
- f) 84% of passengers in West Yorkshire said they were either very or fairly satisfied with the bus driver (of which 59% were very satisfied), which compares to 85% in England.
- g) 61% of passengers in West Yorkshire said they were either very or fairly satisfied with waiting time for the bus, notably lower than the England average (68%). West Yorkshire ranked 32 out of 34 participating Local Transport Authorities for satisfaction with waiting time. 39% of passengers in West Yorkshire said the wait was longer than they expected, compared to 32% of passengers in England as a whole.
- h) 40% of passengers in West Yorkshire rated the reliability of bus services as either very good or fairly good, notably lower than the England average (56%).
- i) 37% of passengers reported their journey being delayed compared to 33% in England as a whole.
- j) 50% of passengers in West Yorkshire rated the frequency of bus services as either very good or fairly good; lower than the England average (61%).
- k) Also rated below the England average were the ease of getting to local amenities, connections with other forms of public transport and “taking me to the places that I want to go”.
- l) The most common main reason for taking the bus was not having the option of travelling by another means; 47% of passengers gave this reason in West Yorkshire compared to 50% in all Urban metropolitan areas.
- m) 57% of passengers reported that the bus stop where they caught their bus had an electronic display showing bus arrival times; much higher than the England average (42%).
- n) Fieldwork for the 2024 survey is in progress with a final report expected to be published in March 2025.

### **Bus Franchising**

- 3.1 Following a recommendation by the Combined Authority, the Mayor made the decision to introduce franchising across West Yorkshire at the Combined Authority meeting on Thursday 14 March. The Combined Authority therefore is currently in a transition phase to the delivery of franchising, and a detailed

update on the mobilisation of this programme and the associated resourcing and financial budget was given at the Combined Authority meeting on 25 July 2024, and further detail of this can be found in the report for that meeting<sup>1</sup>. The following paragraphs provide a summary from that report

### **Background**

- 3.2 This decision followed completion of an Assessment of Bus Reform Options that was undertaken by the Combined Authority, following a statutory legal process.
- 3.3 As part of the Assessment process, a Bus Reform consultation ran from October 2023 to January 2024 which gave statutory consultees (in line with section 123E (4) of the Transport Services Act 2000) and the general public an opportunity to respond. The consultation consisted of a range of awareness raising events including webinars and in-person presentation events.
- 3.4 1,245 responses were provided and in March 2024 the Combined Authority was presented with the key themes emerging from the consultation and the Combined Authority's response.

### **Mobilisation and Timelines**

- 3.5 The legal process required to transition to bus franchising from a deregulated, commercial market is set out in the Transport Services Act 2000, as amended by the Bus Services Act 2017 (the 'Act'). This forms the basis of the Combined Authority's mobilisation plan, and requires the setting of a number of dates as part of the Franchising Scheme which provide the overarching timeline for delivery:

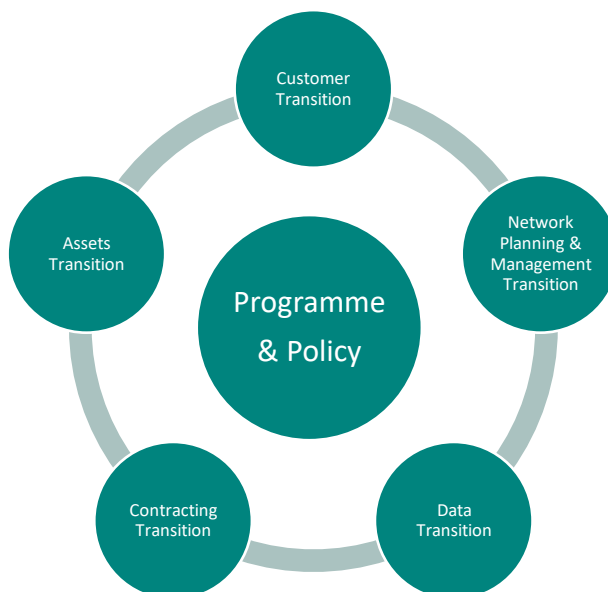


- 3.6 Given the importance of mobilisation to delivering the benefits for the bus franchising programme, the Combined Authority has structured its mobilisation against five identified workstream areas in line with the transition requirements: Customer, Data, Network Planning and Management, Contracting and Assets. These five workstream areas will also be supported by a Programme and Policy Core team within the Combined Authority, managing delivery against the overall timescales and strategic policy

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<sup>1</sup> [25 July Combined Authority report: Bus Franchising](#)

objectives.



- 3.7 An overall bus franchising programme is in place and being iterated to ensure all activities that need to be completed in order to deliver the first phase of the Franchising Scheme are programmed. Each workstream area is then developing a detailed delivery plan of the activities that they will contribute to. With external support being commissioned across a number of these areas over the coming months, these delivery plans will be further enhanced ahead of commencing market engagement on bus franchising from Autumn 2024, with a first operator session planned for late November.

### **Finance and Resourcing**

- 3.8 In line with the Assessment, the first year’s budget (2024/25) for transition to franchising is £5,389,863, which was agreed at the meeting of the Combined Authority on 25 July 2024. This amount has been allocated from the Combined Authority’s Single Investment Fund as was also outlined in the Assessment as the source of revenue funding for transition activities. This will leave £15,010,137 to cover the transition period over the remaining 3 years, and expenditure and funding for future years will be considered and progressed as part of the Combined Authority’s budget process in the autumn.
- 3.9 The split between the five workstream groups set out above, external legal advice, the programme and policy core, and risk, contingency and inflation pots is shown below. The risk, contingency and inflation allocations recognise that at this stage all requirements are not known, and that there will be further calls on these figures as the programme matures during the year, and that some costs may also change. The contingency is 10% of the overall budget, and inflation is 5% of the overall budget. This breakdown includes resource costs along with known costs for consultancy services to produce the outputs set out in the franchising assessment:

Workstream	2024/25 Budget
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Programme and Policy Core	£478,153
Assets Workstream Group	£552,228
Contracting Workstream Group	£250,000
Customer Workstream Group	£96,030
Data Workstream Group	£554,424
Network Planning and Management Workstream Group	£316,088
External Legal	£225,000
Risk	£2,109,461
Contingency	£538,986
Inflation	£269,493
<b>Total</b>	<b>£5,389,863</b>

#### 4. Appendices

The map below provides an illustration of overall patronage change in the last 3 whole weeks of September 2024 compared against similar weeks in 2023. A small percentage change in a busy location such as a city centre can have a bigger impact on whole West Yorkshire figure than a large percentage change in a suburban or rural area. The concentration of patronage decline is much higher in and around Bradford city centre compared to other area. Squares are 1km squares on the Ordnance Survey grid, thick grey lines show district boundaries and thin grey lines show ward boundaries. Source: ticket machine data from First, Arriva, and Transdev, plus some small operators.

