



<b>Report to:</b>	Leeds City Council Scrutiny Board (Infrastructure, Investment and Inclusive Growth)
<b>Date:</b>	1 November 2023
<b>Subject:</b>	<b>Advancing Bus Provision</b>
<b>Director:</b>	Mick Bunting, Interim Director Mobility Services and Transformation
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## 1. Purpose of this Report

- 1.1. This report provides an update regarding the on-going 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. Reports from both these meetings can be viewed on the Combined Authority's website here [WYCA - Modern Gov](#)

## 2. Information

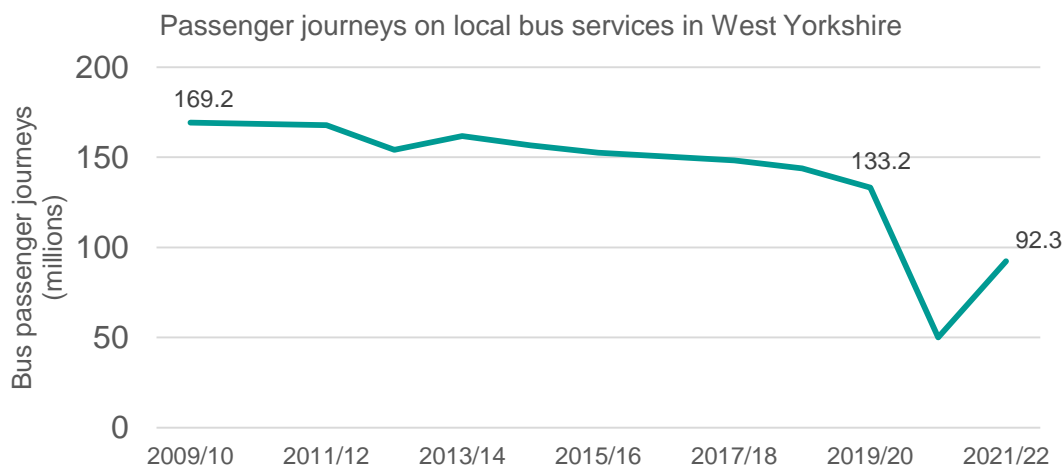
### Current situation

- 2.1. Bus revenues are still significantly lower than pre Covid, meaning bus operators continue to adapt their networks in line with new passenger demands, which has resulted in service reductions in West Yorkshire and Leeds.
- 2.2. Bus services had been sustained throughout the pandemic by a combination of Government and local government funding. In June 2023 the Government withdrew the Bus Recovery Grant (BRG) funding, which has reduced the overall amount of support for bus services in the region. This is partially offset by Bus Service Improvement Plan + (BSIP+) funding that is expected to come directly to the Authority over the next two financial years. BSIP+ funding is focussed on protection and reinstatement of the bus network. There is still an overall reduction in funding, meaning operators continue to review and adapt their networks in line with new passenger demands.
- 2.3. The Combined Authority have already stepped in to retain services however are unable to retain everything given its budget position. Whilst the bus network has reduced over the last decade in West Yorkshire to 79% of previous levels, as a result of the collaboration that has taken place with bus operators, the size of the network has not reduced by as much as the majority of other major conurbations (South Yorkshire 73%, Merseyside 70% and Greater Manchester 68%).



- 2.4. Utilising BSIP+ funding, the Authority has already stepped in to support 26 services which would have been withdrawn or reduced in July 2023, and uplifted c30 existing contracts to ensure bus services have been retained. We are continuing to work closely with bus operators to try to prevent further cuts to the network and are looking at options to reinstate some previously withdrawn services in the future (subject to budget).
- 2.5. The market remains volatile, and the Authority continues to react to commercial bus service changes as and when required, in line with the Transport Committees criteria. The Combined Authority mitigates service withdrawals / reductions where possible to maintain connectivity however as more marginal services become commercially unviable, it is possible that further service reductions will be seen.
- 2.6. Post-pandemic, there remains some uncertainty as to whether travel behaviour changes will become permanent. Before the pandemic, there was a decline in bus use locally and nationally. In West Yorkshire, bus passenger journeys fell by 21% between 2009 and 2019 (from 169m per year to 133m per year, **Figure 1**), with a similar decline (19.5%) in Greater Manchester over the same period.

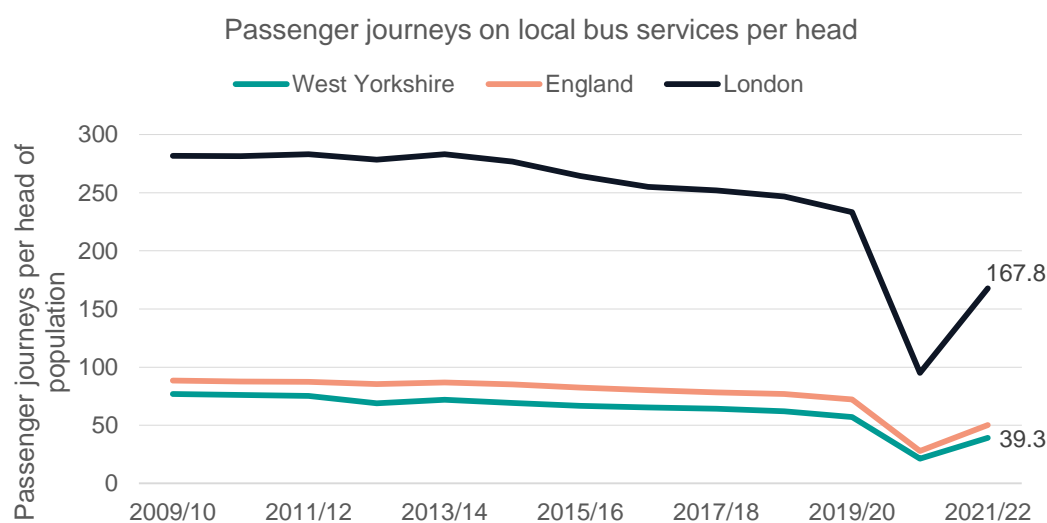
**Figure 1. Passenger journeys on local bus services in West Yorkshire** (*Department for Transport annual bus statistics*)



- 2.7. Compared to England as a whole, West Yorkshire has a consistently lower level of bus passenger journeys per head (**Figure 2**). The most recently published data from DfT shows that in 2021/22, there were 39 bus journeys per head on local bus services in West Yorkshire, compared to 50 across England. In contrast, London saw 168 journeys

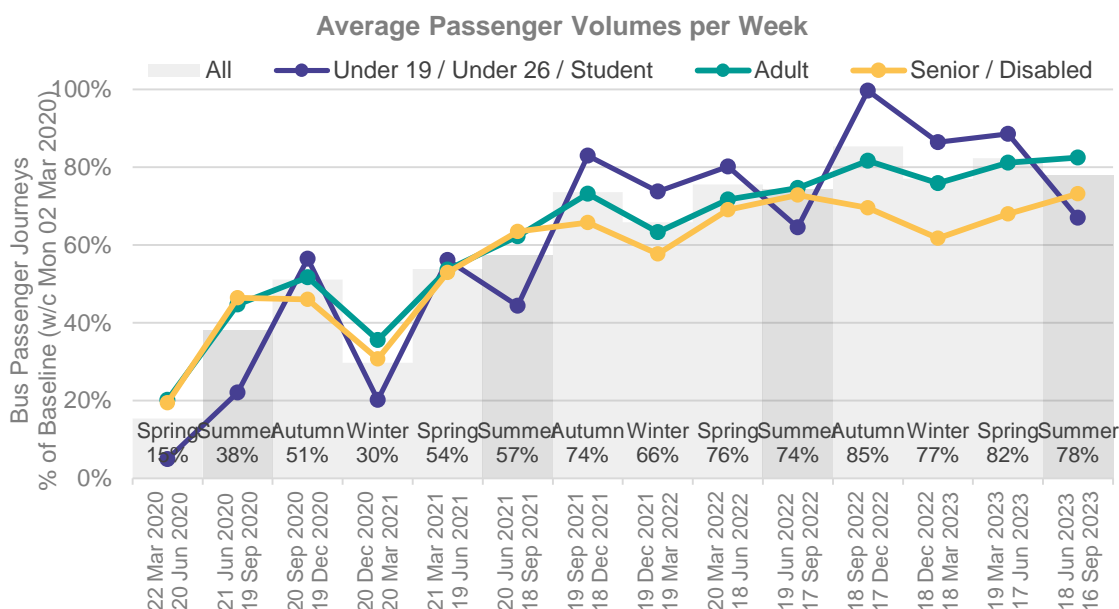
per head on local bus services in 2021/22. This is a marked disparity against both England and West Yorkshire, although the difference has reduced over recent years. All areas saw a marked reduction in 2020/21 followed by a partial recovery in 2021/22.

**Figure 2. Passenger journeys on local bus services per head** (*Department for Transport annual bus statistics*)



- 2.8. Annual bus patronage figures from DfT aren't available yet for 2022/23, however local data from bus operator ticket machines provides picture of passenger recovery since the pandemic. **Figure 3** below shows bus patronage for West Yorkshire, using data from First and Transdev, in 13 week blocks relative to the first week in March (a pre-pandemic baseline week), in broad cohorts of Under 19 / Under 26 / Student, Adult, and Senior / Disabled ticket types.
- 2.9. Between June and September 2023, overall bus patronage (all days of the week) was as 78% of baseline levels. At the same point in 2022, overall patronage was 74% of baseline, indicating that more than a year after all COVID-19 restrictions were lifted, there is still a recovery trend, particularly when considering the long-term trend in patronage as shown in **Figure 1**. Note that the baseline week was term-time, so it is also reasonable to consider similar weeks at different times of year, though weather conditions, strikes, and other factors impact individual weeks, typical figures for term time.

**Figure 3. Average bus passenger volumes per week by cohort in West Yorkshire (data)**



2.10. In addition to overall bus patronage trends, Leeds Park and Ride passenger volumes provide another barometer pandemic related travel behaviour change. Total Park and Ride passenger numbers in August 2023 were at 77% of the equivalent month’s pre-pandemic levels (August 2019), which includes all three sites (**Figure 4**). This recent trend, which followed a fare increase (February 2023) and service changes (in April and May 2023) is a deviation from the steady recovery observed throughout 2022. On a site-by-site basis, in August 2023 average monthly passenger numbers at Elland Road were at 49% of the equivalent month’s pre-pandemic levels (August 2019) whilst at Temple Green Park & Ride they were at 40% of pre-pandemic levels.

**Figure 4. Park & Ride total passengers for all 3 sites over time (WYCA park and ride figures)**



Park and Ride - Total number of passengers by month

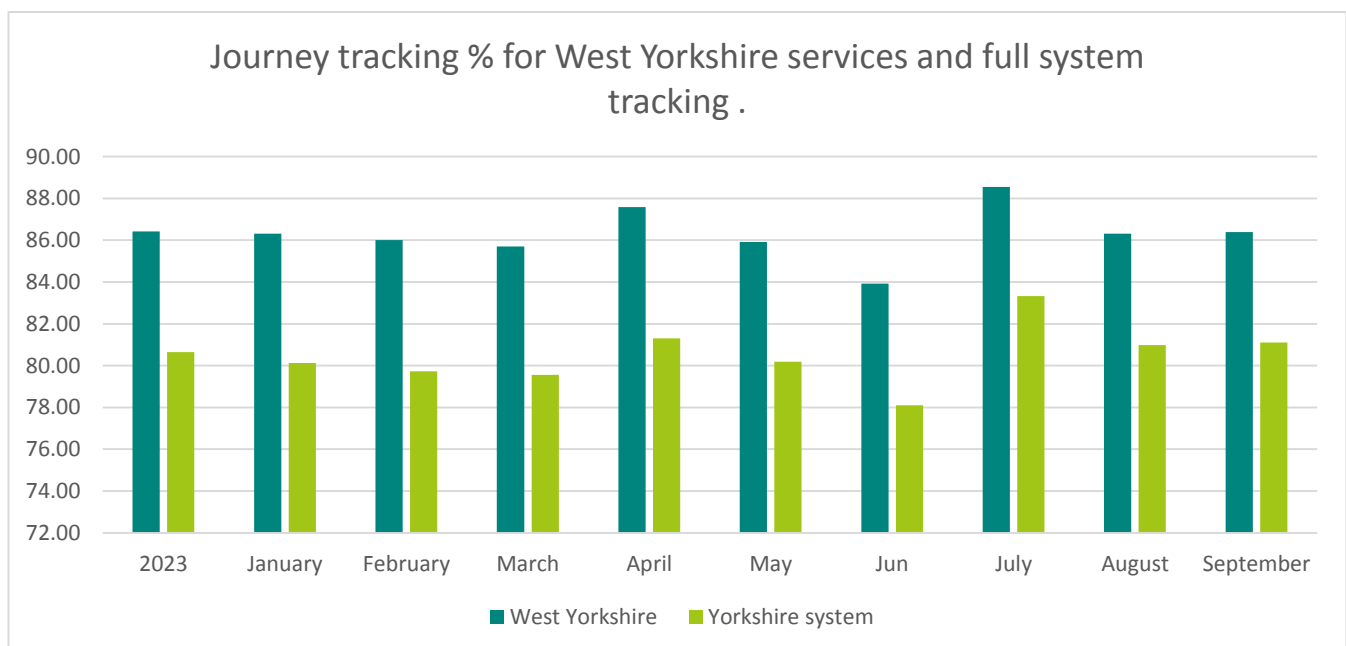


2.11. Recruitment and retention of staff within the sector (e.g. drivers) continues to be challenging. Bus operators have advised that whilst they have enhanced training schools, they are still struggling to retain staff. Driver wages have also risen significantly which is impacting costs.

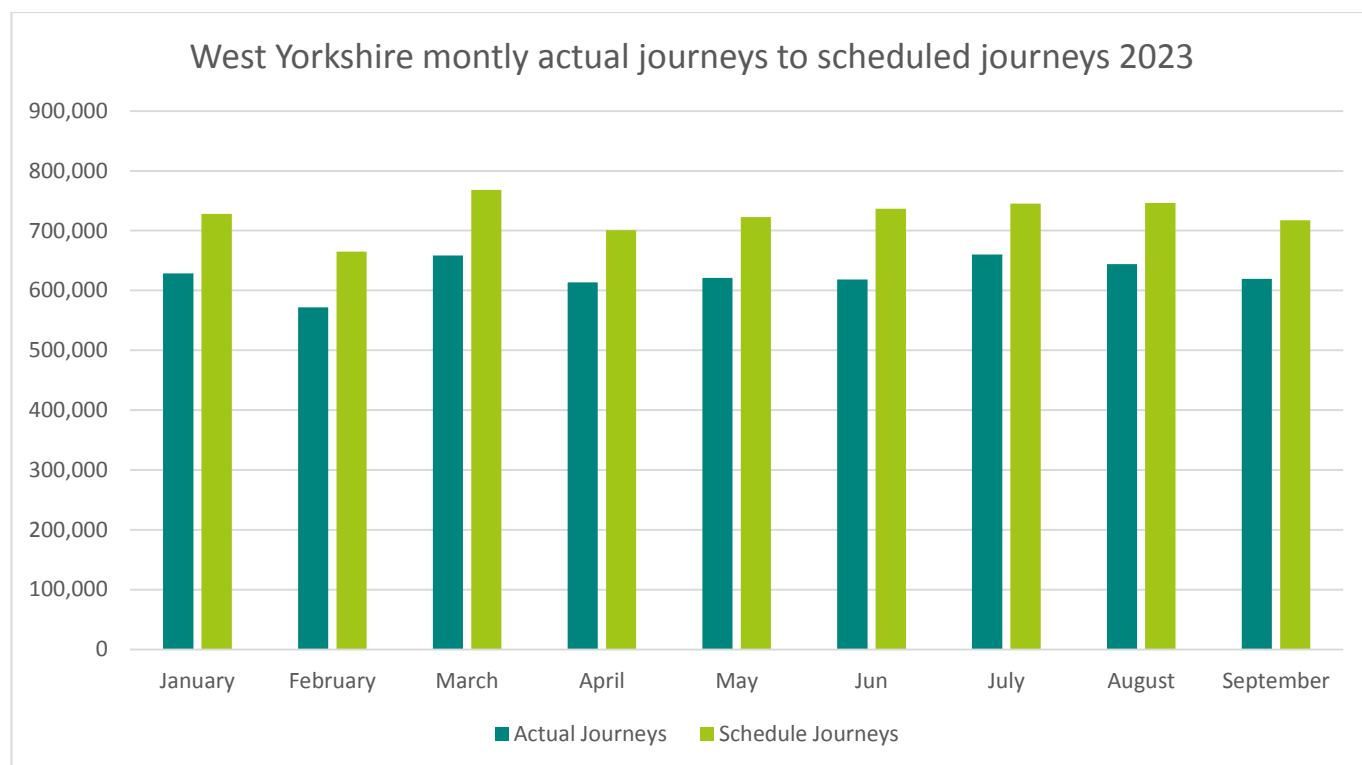
### Real Time Passenger Information

2.12. In terms of the real time system performance, the charts below show the figures for all real-time enabled operators in 2023, with the percentage of West Yorkshire actual tracked journeys, compared to the full system actual tracked percentage in **Figure 5**, and the scheduled to actual journey in the system for the West Yorkshire region shown in **Figure 6**.

**Figure 5. Tracking percentage of bus services for 2023 for West Yorkshire region**



**Figure 6. Scheduled to actual bus journeys in the real time system for Yorkshire only**



*\*Actual Journeys in blue. Scheduled journeys in orange.*

2.13. 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.

### **Passenger Network Performance**

2.14. Bus service performance is measured by reliability, which is the number of service journeys which actually operate, and punctuality, the percentage of buses operating on time (i.e., no more than 1 minute early or 5 minutes late) at the start of the route and at timing points along the route. The Bus Alliance collates figures on this from the three major bus companies in the region (First, Arriva and Transdev), the latest quarterly figures West Yorkshire wide are:

Month	Reliability	Punctuality <i>(from the first stop)</i>	Punctuality <i>(stops along the way)</i>
April 2023	96.8%	89.8%	81.3%
May 2023	97.2%	88.0%	78.3%
June 2023	97.4%	88.7%	79.8%

- 2.15. The bus industry target is for 99.5% of registered bus service mileage to be operated (reliability) and 95% of buses to run no more than 1 minute early or 5 minutes late (punctuality). The above results show performance significantly less than the target over the full period. The results are currently aggregated over all operators at all times of the week and the passenger experience at busier times may be worse than this in some places.
- 2.16. Transport Committee members have asked for a more detailed analysis of these results by area. There are a number of data issues to resolve to enable this and it is hoped to offer greater detail in this regard later in 2023.

### **Bus Service Improvement Plan**

- 2.17. The Department for Transport (DfT) funded Bus Service Improvement Plan (BSIP) revenue programme is the Combined Authority's main way to responding to current industry challenges and support transformation for bus passengers in the short to medium term. It reflects the ambitions set out in the [BSIP strategy document](#), which was published in October 2021, and informed the funding bid to Government.
- 2.18. In April 2022, the Combined Authority was notified by the DfT that it had been indicatively awarded £69,974,070 in revenue funding, over three financial years, to support delivery of its BSIP.
- 2.19. In agreeing what the funding should be spent on, the DfT advised that it wanted to see it prioritised towards 'cheaper and simplified fares' and 'increased service frequencies and new routes'; and that the delivery of associated initiatives would need to be agreed with bus operators as part of a 'BSIP' Enhanced Partnership (EP) scheme, before the funding would be released to the Combined Authority.
- 2.20. A BSIP funding package, outlined in **Table 1**, was agreed by the Combined Authority as the basis for its revised spending submission to DfT and development of the corresponding EP scheme. This funding was confirmed by DfT and received by the Combined Authority in November 2022.

**Table 1 – BSIP revenue funding programme overview**

Funding area	Schemes and interventions	Revenue cost (£m)
Clear and simple fares	<ul style="list-style-type: none"> <li>• Mayors Fares’ subsidy.</li> <li>• Business to customer sales and marketing.</li> <li>• Business to business sales.</li> </ul>	£36,974,070
New and improved services	<ul style="list-style-type: none"> <li>• Evolution and growth of the bus network.</li> <li>• ‘Superbus’ (now referred to as ‘Enhanced Bus Services’).</li> <li>• Service innovation – Demand Responsive Transport and Mobility Hubs.</li> </ul>	£30,950,000
Supporting bus priority and safety	<ul style="list-style-type: none"> <li>• Improvements to coordination of bus, urban traffic and passenger information.</li> <li>• Enhanced Safer Travel Partnership with the WY police.</li> </ul>	£2,050,000
<b>10. Total revenue cost</b>		£69,974,070

- 2.21. Significant progress is underway against the schemes and interventions in **Table 1** above, which provides a great opportunity to invest in the bus network.
- 2.22. Further information on progress of other interventions, such as Mayors Fares’ and the Safer Travel Partnership are set out below. Two ‘Superbus’ schemes have already been launched in September 2023, which included enhancements to the Alreline service. This has significantly increased the frequency between Leeds, Rodley, Calverly, and Shipley (from every 30 minutes to every 20 minutes).
- 2.23. The BSIP Plan can be viewed on the link below.  
[West Yorkshire Bus Service Improvement Plan \(BSIP\) - West Yorkshire Combined Authority \(westyorks-ca.gov.uk\)](https://www.westyorks-ca.gov.uk)

### **Safer Travel Update**

- 2.24. A Safer Travel team is being established, which will consist of a total of 15 funded Safer Travel PCSOs (10 funded through BSIP, and 5 funded through other WYCA funds and the operators). There will be three in each district, dedicated full time to working in the bus stations, on the buses and around the bus network. There is also one Police Sargeant to co-ordinate the team centrally, and the team will be working with the



Combined Authority, bus operators, neighbourhood policing teams and partner agencies to make the bus network even safer. The team's main aims are to:

- Reduce violent crime.
- Reduce anti-social behaviour.
- Protect women and girls (VAWG)
- Protect the young and vulnerable.

2.25. The team is working with schools across West Yorkshire to deliver key safer travel messages to pupils, and other initiatives to educate young people on the effects of crime they have been linked with and offer support to aim to prevent repeat offences.

2.26. Throughout August, there were a total of 13 operations delivered by the team. These were focussed on engagement and making people feel safe when using the bus stations and buses. Below are some of the key highlights:

- Officers worked with security to enforce banning orders and issue new ones.
- 27 Intelligence reports submitted.
- Local businesses and bus operator's stated they had felt the increased police presence at key locations, noted the decreased anti social behaviour (ASB) and **felt safer**
- Yellow letters issues and young people taken home by police to deter further issues.

2.27. Recruitment to the Safer Travel team continues with most posts now filled, and staff deployed in all districts across West Yorkshire. Two further officers have commenced training and are due to start work in Leeds at the end of the year.

### **Mayor's Fares**

2.28. Up to April 2023, a total of 28.9m journeys were made using Mayor's Fares products, approaching 800,000 per week. Passengers have saved a total of £11m compared to what they would have paid without the initiative, meaning a customer saving of approximately 25%.

2.29. Customer savings between August 2022 and April 2023 have been funded by £9.9m of BSIP funding, with a forecasted total cost for Year 1 to August 2023 totalling £14.9m. Year 2 payments are being worked out factoring in inflation to the shadow commercial fare and an increase in customer journeys as the economy continued to grow during the back end of 2022.

2.30. The split between journeys on Mayor's Fares Singles and the capped Daysaver is 25% Daysaver and 75% Singles. Growth through the start of the scheme has been hard to assess due to other economic factors at play such as the cost-of-living crisis and employers' changes regarding home and hybrid working. Now recovery in the market has

stabilised post pandemic, the CA will assess growth consequent to the scheme being in place.

### **Fares & Ticketing**

- 2.31. The MCard scheme, managed by the Combined Authority on behalf of West Yorkshire Ticketing Company, is experiencing strong overall growth. Turnover has increased from £24.2m in FY 2021-22 to £39.1m in FY 2022-23. This is also above the pre-Covid level of £34.6m (FY 2019-20). This growth is largely in the Under 19 sector and in DaySaver products – with the DaySaver price fixed at £4.50 via the subsidised Mayor’s Fares offer since September 2022. It also reflects a reduced offering of non-MCard single-operator tickets. Longer-term products such as adult annual tickets, particularly for Bus & Rail, have declined due to factors such as decreased full-time commuting.
- 2.32. Where buses provide a practical end-to-end journey, Mayor’s Fares (see above) and cost-of-living concerns will result in some shift from bus & rail products to cheaper bus-only products. The MCard Mobile app represents an increasing proportion of MCard product sales – 87% of ‘off-bus’ sales and 28% of total sales in July 2023.
- 2.33. Fare simplification has been progressed through West Yorkshire Ticketing Company, which has resulted in the withdrawal of local day tickets by some operators and moves by operators to promote MCard tickets over single-operator tickets in some cases. Further work will take place to assess other opportunities to simplify fares. On the rail side, this will be led by Great British Railways (GBR) once that body gets fully established.

### **Bus Reform**

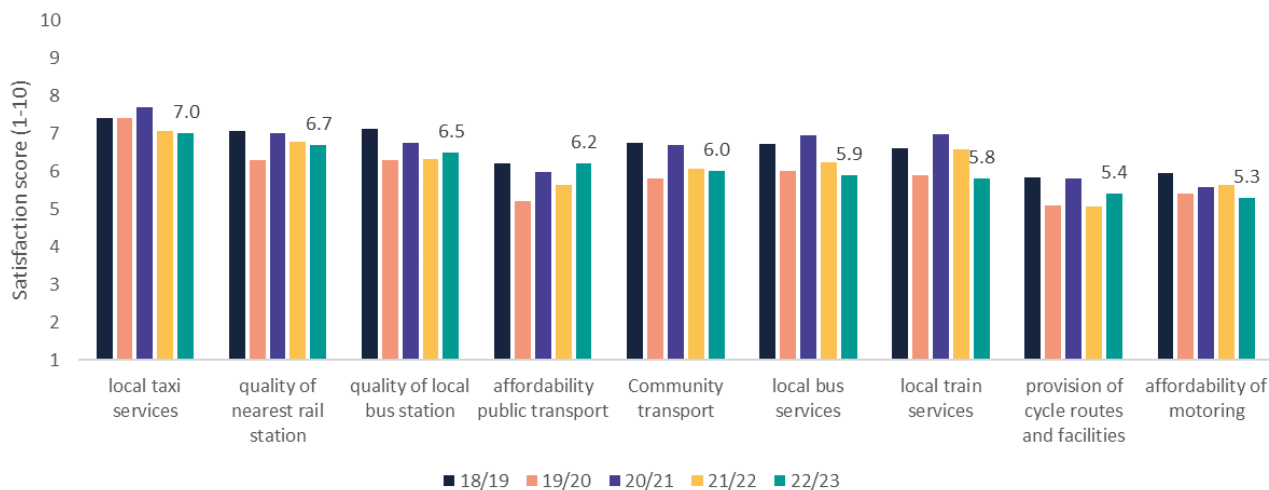
- 2.34. In response to the many challenges facing bus passengers and the industry - including variable customer satisfaction levels, declining patronage (over the long-term and accelerated by the impacts of the Covid 19 pandemic) and a financial system increasingly dependent on public funding support to maintain current service levels - a Notice of Intent to conduct an assessment of a Franchising scheme was issued by the Combined Authority in June 2021 in accordance with 123C of the Transport Services Act 2000, as amended by the Bus Services Act 2017 (the ‘Act’).
- 2.35. In accordance with the statutory process, in May 2023, following a report and the provision of a draft version of the Assessment, the Combined Authority noted the Assessment’s draft conclusions and recommendation including that:
- According to the assessment across all options including the reference case, the public sector will be increasingly relied on to support the bus sector over time – Franchising is identified as providing the greatest levels of control and direct influence to manage these risks.
  - The assessment concludes ‘that Franchising is the preferred option for the Combined Authority to progress with subject to both the audit and the outcome of the statutory consultation, which will inform a report and recommendation to the Mayor’.

- 2.36. Following completion of the audit process, including provision of an independent Auditor's report, in [September 2023](#) the Combined Authority determined to progress to statutory consultation. This launched on October 10 2023 and will run until January 7 2024. All relevant consultation material is available via the Combined Authority's YourVoice webpage ([www.yourvoice.westyorks-ca.gov.uk/busreform](http://www.yourvoice.westyorks-ca.gov.uk/busreform)). The Combined Authority is encouraging responses from all statutory consultees – including Leeds City Council - and the general public. Consultation events will be held across the region, including in Leeds, full details are available online.

### **Evidence of customer satisfaction**

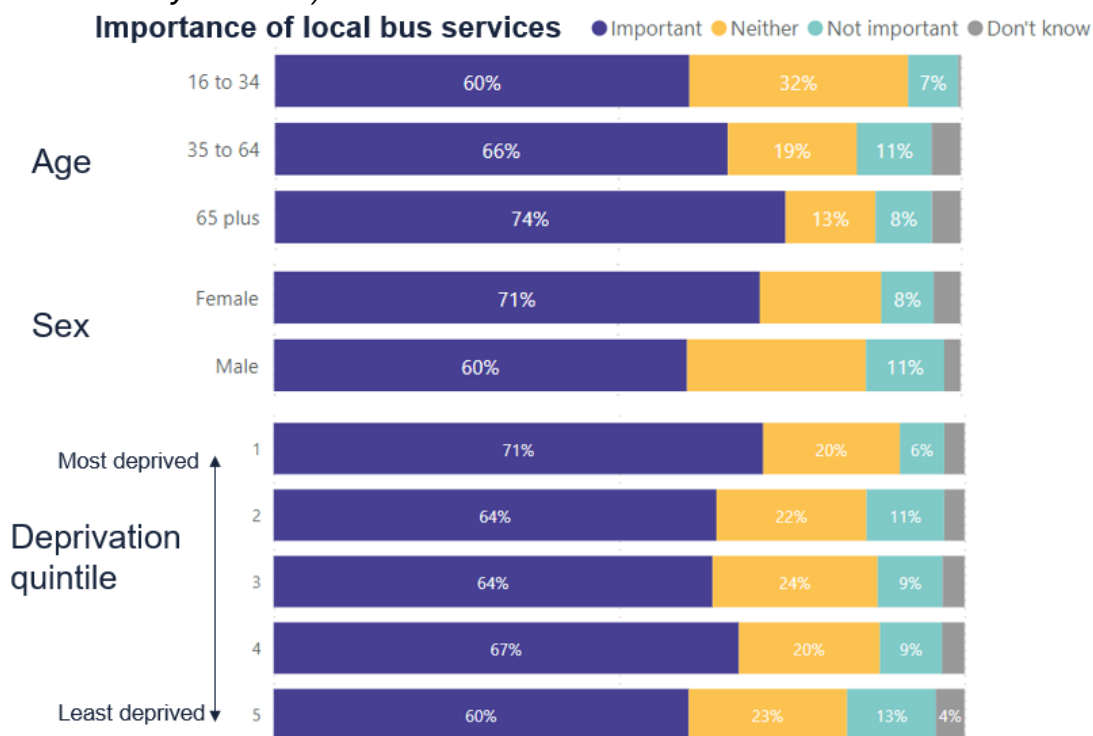
- 2.37. Results from the [annual public perceptions of transport survey](#) provide a range of measures of satisfaction with local transport which are important barometers of the West Yorkshire Transport Strategy as well as being used as indicators for the State of the Region report and major programmes like the City Region Sustainable Transport Settlement and the Bus Service Improvement Plan. This survey is a representative sample of 1,800 West Yorkshire residents accounting for age, gender, district and ethnicity and therefore provide a robust method of measuring temporal trends in travel behaviours and sentiment.
- 2.38. The results of the latest survey revealed that satisfaction with West Yorkshire's local train services is at a 5-year low and satisfaction with local bus services has fallen again with a statistically *significant* decline since last year (**Figure 7**).
- 2.39. The results also reveal that satisfaction with the affordability of motoring has fallen whilst the affordability of public transport has increased back to pre-pandemic levels. This improvement in satisfaction may have been aided by the recent Mayor's Fares initiative which limits a single bus fare to £2 and daily fares to £4.50. Satisfaction with the affordability of public transport is 6.9 (out of 10) amongst residents who use the bus at least once a week, up from 5.8 (out of 10) last year.

**Figure 7. Satisfaction scores for a range of transport measures over time** (*annual public perceptions of Transport survey 2022/23*)



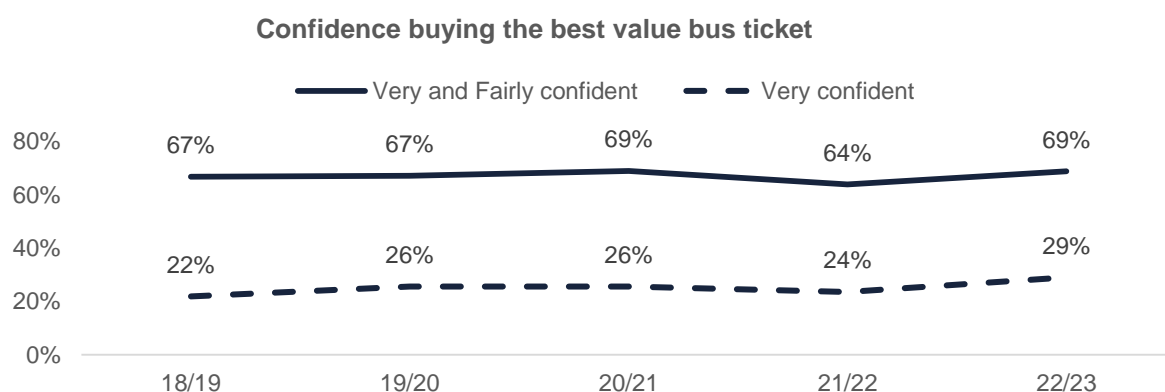
2.40. Results of the survey highlight the continued importance of local bus services to key demographic groups (**Figure 8**); self-reported importance of local bus services was higher for females, residents aged over 65, ethnic minorities, residents living in the most deprived neighbourhoods, residents in full time education and regular bus users (defined as those who use the bus at least once a week).

**Figure 8. Importance of local bus services** (annual public perceptions of Transport survey 2022/23)



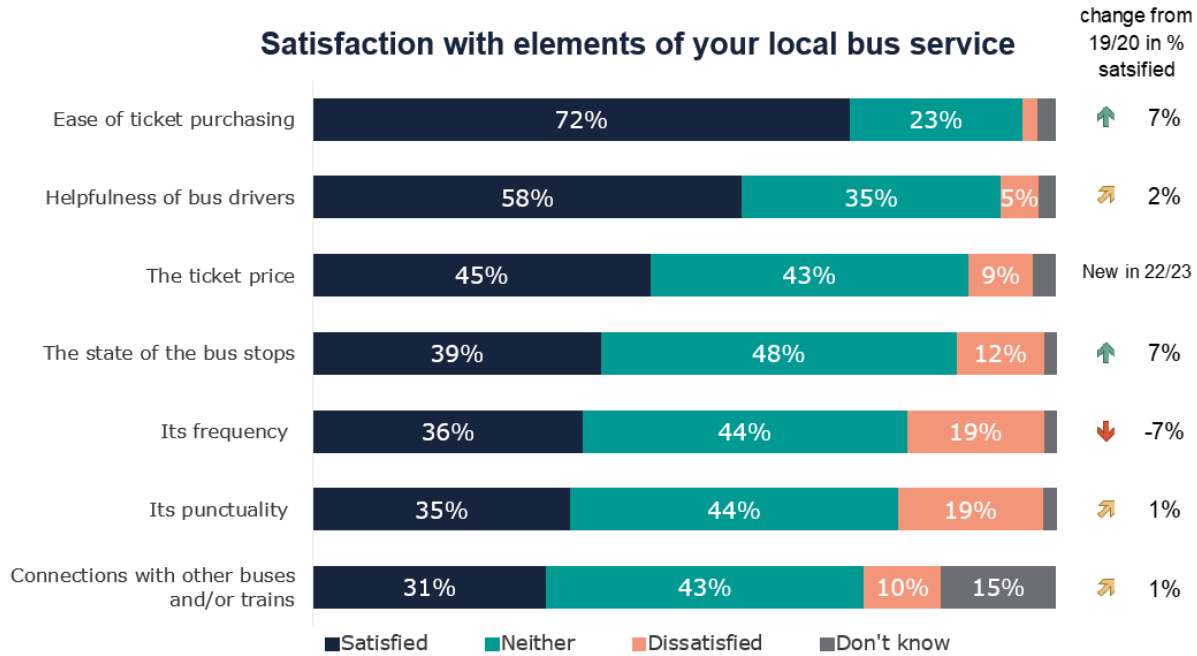
2.41. The survey also found that 69% residents (excluding those who have a bus pass) reported being confident purchasing the best value bus ticket (**Figure 9**). This rises to 85% for regular bus users (use the bus at least weekly). Notably, the share of respondents who reported being very confident rose in the last year, which could be attributed to the national and local fare cap introduced in September 2022.

**Figure 9. Confidence buying the best value bus ticket** (annual public perceptions of Transport survey 2022/23)



2.42. When residents were asked about with satisfaction of various elements of local buses (**Figure 10**), the survey found that satisfaction with the ease of purchasing a ticket was 72%, the highest level in the last 5 years. 58% of respondents were satisfied with the helpfulness of drivers whilst only 36% were satisfied with bus frequency (a 7% point decline since 2012/20) and 35% were satisfied with punctuality.

**Figure 10. Satisfaction with various elements of local bus services** (annual public perceptions of Transport survey 2022/23)

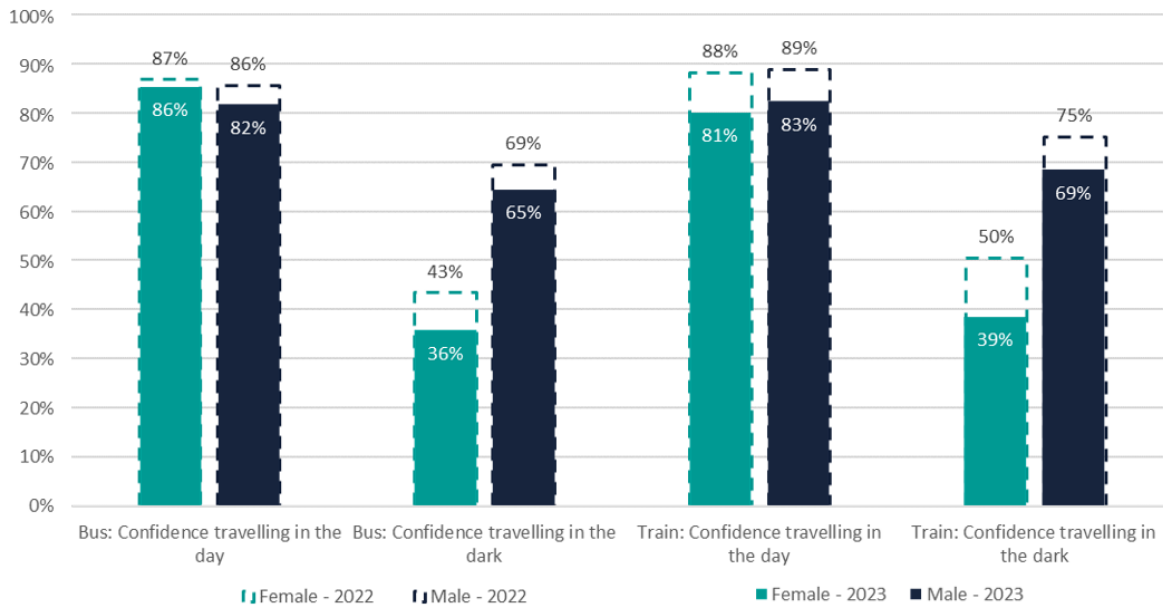


2.43. Finally, the survey also asked residents about confidence in personal safety when travelling on public transport (**Figure 11**). The results reveal that confidence in personal safety when travelling on both train and bus has fallen over the past year for both males and females, with stark difference between genders. Other demographic groups with low safety confidence levels on bus in the dark are those aged 65+ (41%), people who use the bus never or less than once a year (36%) and the long-term sick and disabled (29%).

**Figure 11. Confidence in personal safety when travelling by bus and train** (annual public perceptions of Transport survey 2022/23)



### Confidence of personal safety when travelling by bus and train



### Investment in capital infrastructure benefiting bus service delivery

- 2.44. The Combined Authority are developing proposals to invest in bus stations, shelters, and stops to improve the bus passenger experience and environment for all points on a journey. With funding from the City Region Sustainable Transport Settlement (CRSTS) and Levelling Up Fund 2 (LUF2), improvement works will be delivered at a number of stations and locations across West Yorkshire, including further improvement to Leeds Bus Station. This package of works will also build on the work of the existing Safety, Accessibility and Environment Programme (SAEP), which delivered safety and security enhancements at 10 West Yorkshire bus stations. A review of the Combined Authority's current assets is underway to develop a long list of potential interventions at bus stations, stops, and shelters, with proposals then moving forward seeking completion of the programme by 2026/27.
- 2.45. Investment is also being made in bus priority measures on the highways to improve reliability, punctuality and journey times, increasing the attractiveness of bus as a viable sustainable mode of public transport. Such measures include the provision of bus priority lanes, bus gates, bus priority at signalised junctions and general congestion relief at hot spots along routes. This investment will provide benefits not only in our urban centres but also along the key corridors that link our communities to key destinations. For example, investment in the city centre has brought in a number of new bus gates, enabling buses

to retain access to the core city centre and enhance the offer of accessing the city by sustainable modes. The proposed Beckett Street bus priority scheme will combine bus lanes and junction upgrades to link the city centre and St James's Hospital with the north east side of Leeds. The proposed Elland Road- Churwell Hill scheme will introduce a bus bypass lane to allow buses to avoid queuing traffic at a busy junction onto the ring road.

- 2.46. Further information on the recent and proposed investment in infrastructure supporting bus journeys can be found in Appendix A.

### **Progress on zero emission buses**

- 2.47. A zero-emission bus system is a core element of the Combined Authority's long-term vision for buses: the Bus Services Improvement Plan (BSIP) sets out our ambition to have a fully zero emission fleet by 2036. Although buses only account for 3% of carbon emissions from road transport, the scale of this ambition is significant as only 2% of the West Yorkshire bus fleet are zero emission currently.
- 2.48. The West Yorkshire Zero Emission Bus (ZEB) Programme will see the introduction of between 200 and 270 zero emission buses along with supporting infrastructure to West Yorkshire, which will take the proportion of buses that are zero emission in West Yorkshire from 2% up to potentially 19%. This programme includes:
- Phase 1: £70million project to introduce 136 zero emission buses and charging on routes in Bradford, Leeds, and Wakefield districts funded through Department for Transport's Zero Emission Bus Regional Area (ZEBRA) funding. This scheme is in delivery, with the first zero emission buses delivered under this scheme are expected to be operating on routes in Leeds by March 2024, with ambitions for more to follow on routes in Bradford and Wakefield.
  - Phase 2: £4 million project to introduce eight zero emission buses and charging to routes in Calderdale and Kirklees funded through Gain Share, with a focus on exploring the impact of hilly landscape on the running of electric buses. This scheme is in development and undertaking market testing.
  - Phase 3: £21million project to introduce between 60 and 126 zero emission buses and charging (number of vehicles subject to delivery model). This will be funded through City Region Sustainable Transport Settlement (CRSTS). This scheme is also in development.

Work is underway to develop a strategy for transitioning to remaining bus fleet to zero emission.

## **3. Tackling the Climate Emergency Implications**

- 3.1. A key aim of advancing the bus network is to enable and encourage people to travel by sustainable models of transport to tackle the climate emergency.



#### **4. Inclusive Growth Implications**

- 4.1. The interventions described in this report seek to protect services for communities, particularly in areas of high deprivation, in order to support the region's inclusive growth ambitions.

#### **5. Equity and Diversity Implications**

- 5.1. Supporting Equity and Diversity through ensuring the bus service is attractive, inclusive and accessible for all is a key aim of the West Yorkshire bus service interventions.

#### **6. Financial Implications**

- 6.1. None as a result of this report.

#### **7. Legal Implications**

- 7.1. None as a result of this report.

#### **8. Staffing Implications**

- 8.1. None as a result of this report.

#### **9. External Consultees**

- 9.1. No external consultations have been completed as part of this report.

#### **10. Recommendations**

- 10.1. That the Scrutiny Committee notes the current position regarding advancing bus provision

#### **11. Background Documents**

- 11.1. Members of the Scrutiny Committee can access full papers on this topic through the Combined Authority website here [WYCA - Modern Gov](#)

#### **12. Appendices**

Appendix A – Bus provision update, Leeds - Bus Infrastructure Investment

- A1: West Yorkshire Transport Fund
- A2: City Region Sustainable Transport Fund
- A3: Investment linked to levelling up funding
- A4: Funding linked to Leeds Public Transport Investment Programme

Appendix B - Current Bus Scheme Costs as at October 2023