

## **Appendix 2**

### **Issues and Trends**

Patronage growth and modal shift to bus, away from car, are essential to delivering the shared priorities of reduced congestion, better air quality, better quality of life, improved road safety and better accessibility and social inclusion.

Bus patronage in West Yorkshire in the period 1999 to 2004 has remained broadly static (partly as a result of a short term transfer from rail), but in 2003/4 it declined by 2.2% from 2002/3.

There are a number of factors that have and will affect modal share and bus patronage.

Some of these have been identified by a recent consultation exercise by Metro. Public transport users were asked what they saw as “a very big or fairly big problem”. Of users, the top five answers in order were:

- 1) The frequency of public transport services**
- 2) Public transport services not linking together (e.g. buses with trains or other buses)**
- 3) The reliability of the system**
- 4) The quality of information about public transport services and traffic conditions**
- 5) Public Transport fares**

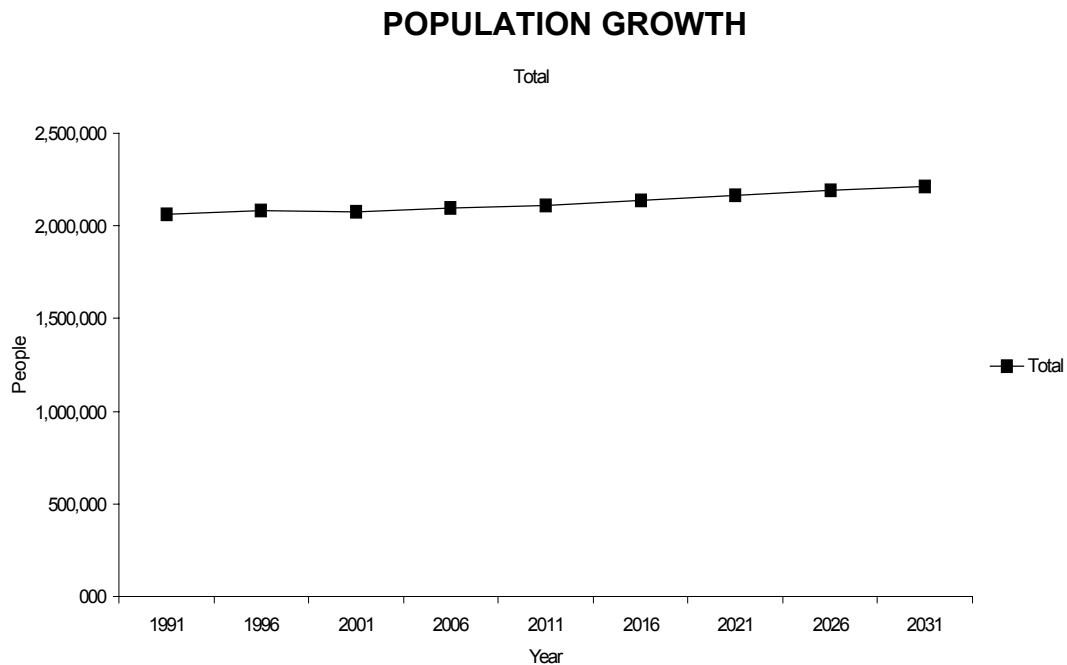
These are dealt with below along with public transport trends.

#### **A. Spatial Issues**

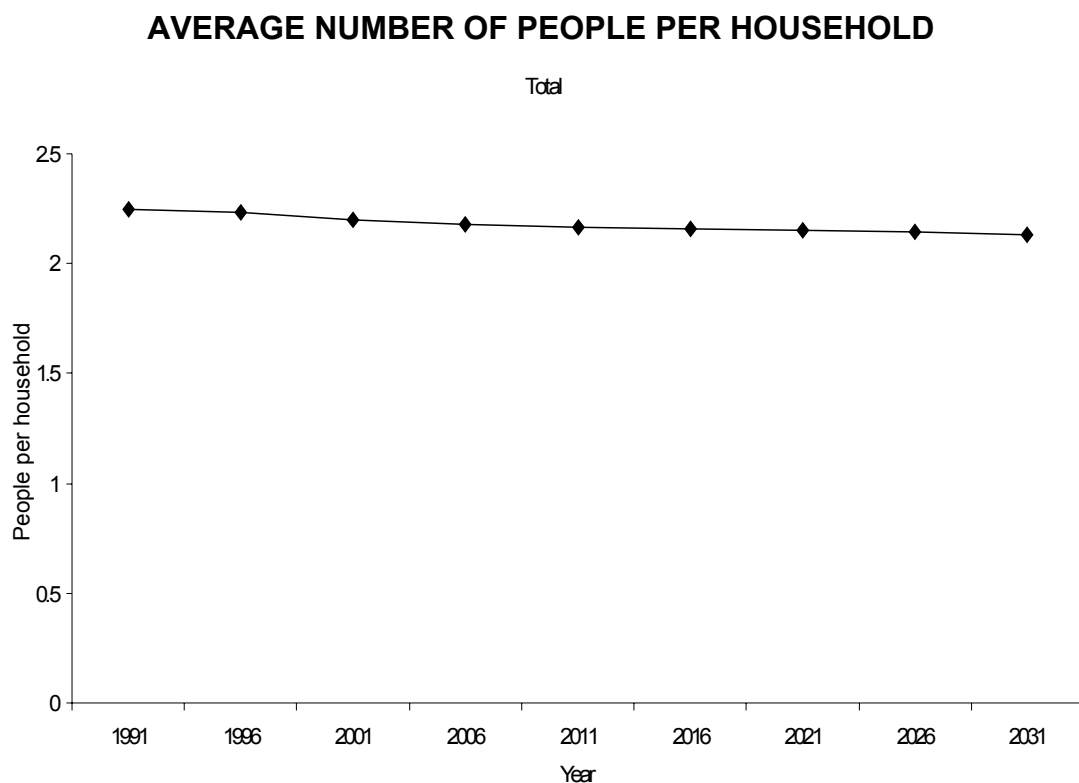
- Trip patterns are becoming more diverse with the growth of “out-of- town” facilities for retail, leisure and work which are more difficult to serve by conventional public transport.
- The average journey length to work is increasing as employment in Leeds in particular (predicted 31,000 more jobs in the next ten years) continues to grow at a faster rate than other areas of the County. Journey lengths have increased by about 25% between 1991 and 2001 and are likely to increase in future.
- There has been significant growth in car traffic into Leeds and other major urban centres which is likely to continue.
- Historic planning consents that spread development are still being implemented and will further diversify trip patterns.

## B. Demographics

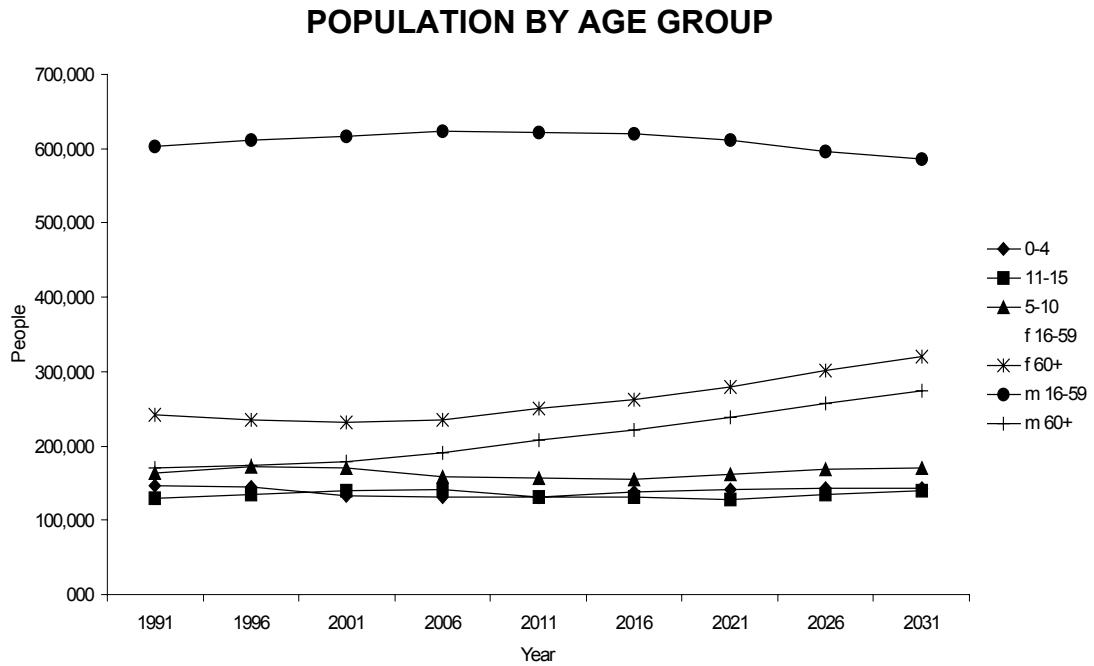
- The population of West Yorkshire is expected to increase marginally over the period of the plan and beyond.



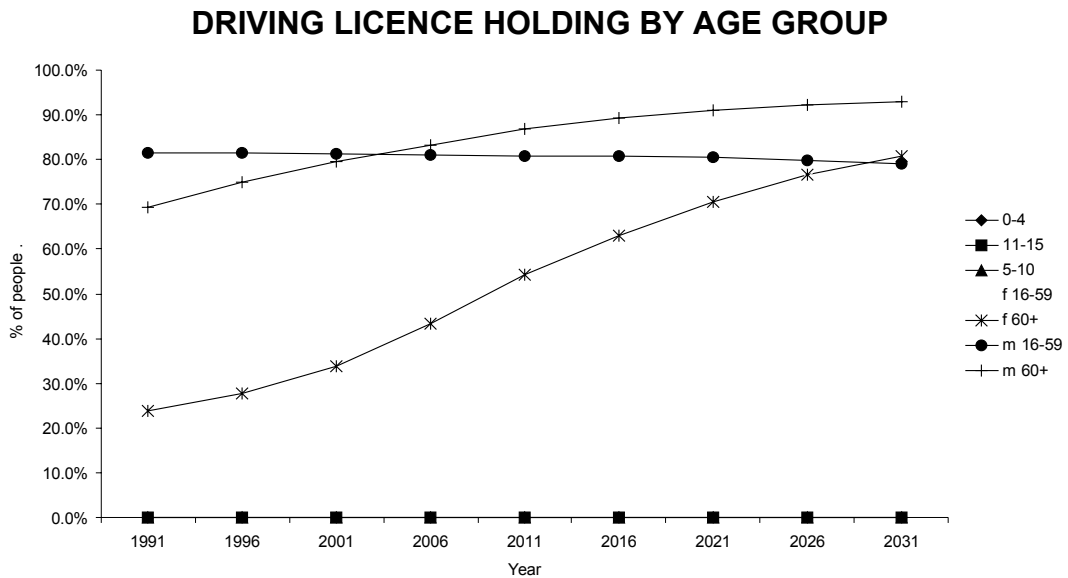
- The average number of people per household is expected to decline. This is likely to have implications for population densities and make it harder for Bus Operators to run viable services.



- There will be a significant increase in the proportion of people over 60 years of age.

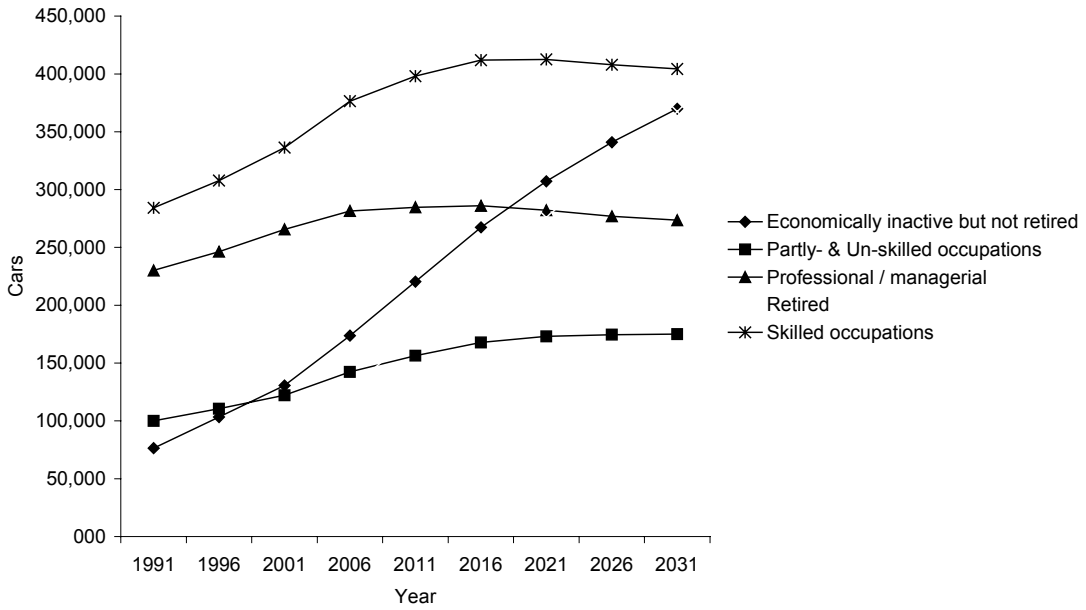


- There will be a marked increase in driving licence holding of women over 60.



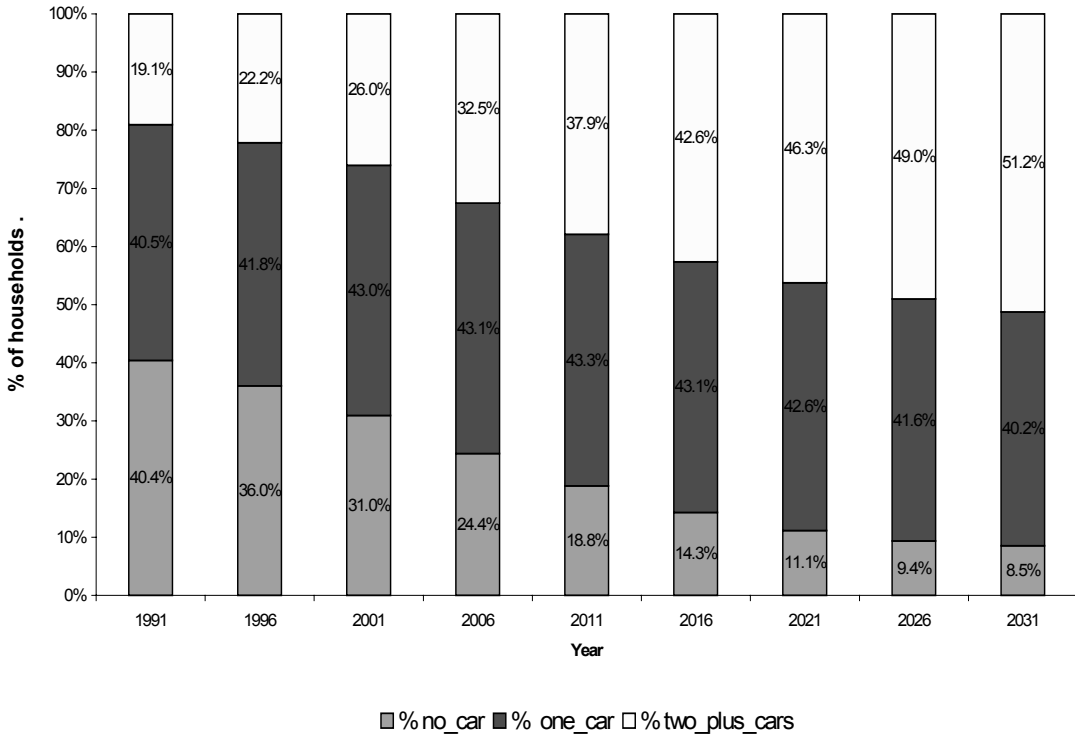
- There will be a marked increase in car ownership amongst those who are retired and those who are economically inactive but not retired.

### CAR OWNERSHIP BY SOCIAL GROUP



- There will be a significant increase in car ownership particularly in the category of two or more cars per household.

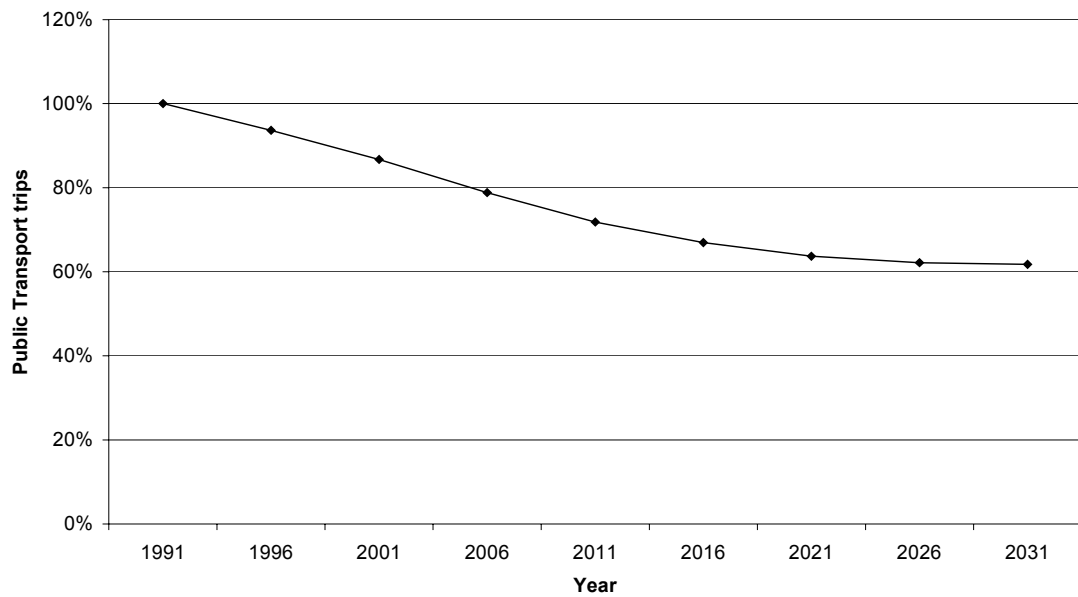
### CAR OWNERSHIP BY HOUSEHOLD



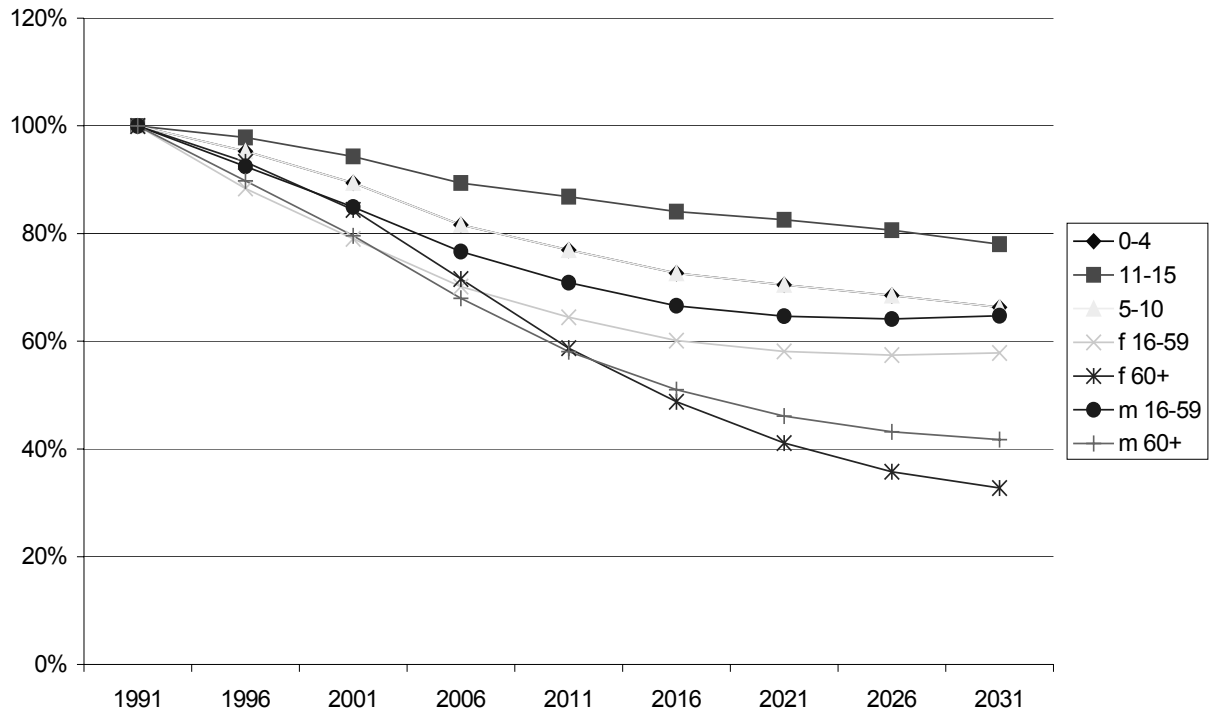
- These demographic changes, unless interventions are made, will lead to a significant and sustained patronage loss to the bus. Modal Share of all trips by bus will also significantly decline.

This may be exacerbated by changes in the retirement age. Over 60's may be more economically active and therefore have more disposable income.

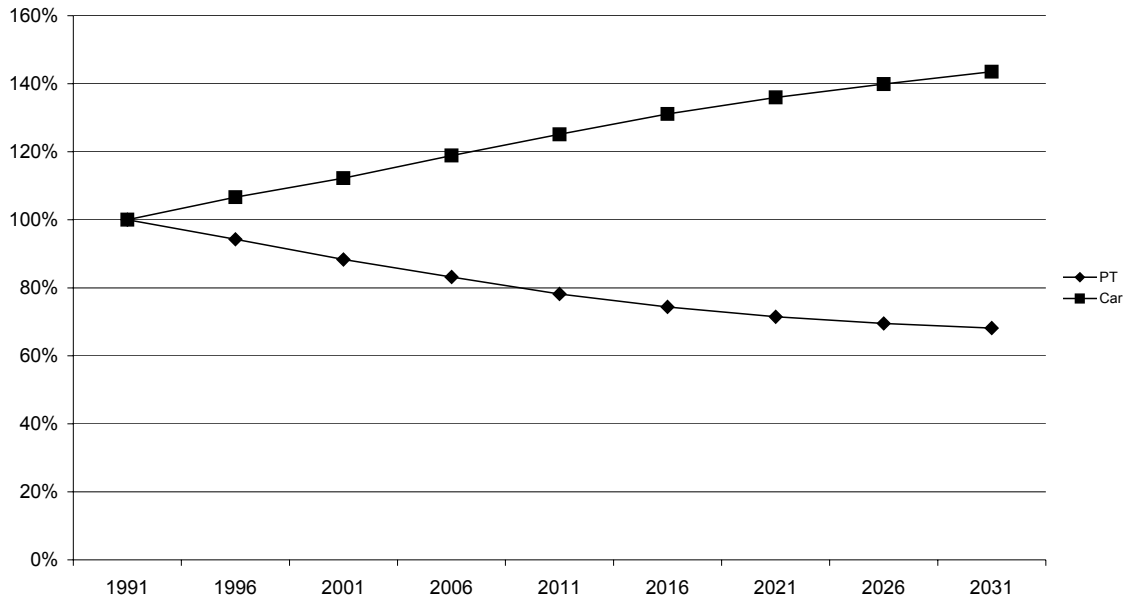
### **PUBLIC TRANSPORT TRIPS (BASELINE)**



### **PUBLIC TRANSPORT TRIPS BY SEX AND AGE (BASELINE)**



## PROPORTION OF JOURNEYS BY PUBLIC TRANSPORT AND CAR



### C. Reliability/Punctuality

- Recent Market research undertaken in West Yorkshire amongst bus users has identified that passengers see “reliability and punctuality” as in fact “reliability and frequency”, or excess wait time at stops.

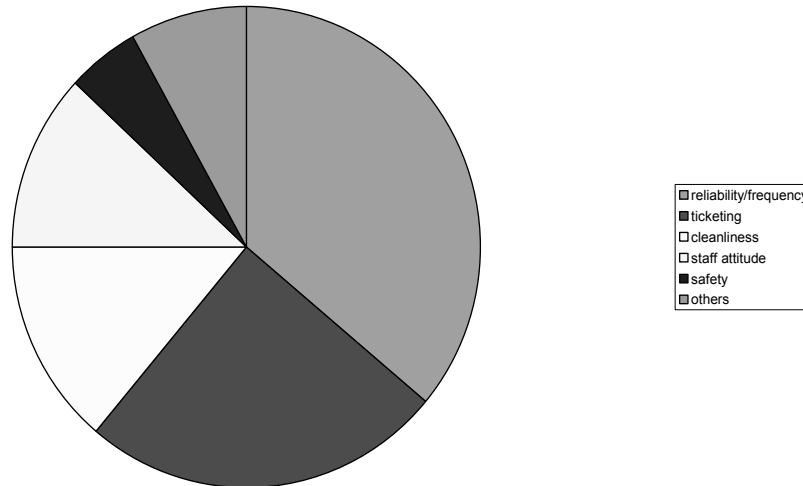
One of the conclusions of the report is:

**“The evidence clearly suggests that improving perceptions regarding the wait for the bus is, all else being equal, the most effective way to improved passenger satisfaction”.**

- The report also concludes that frequency/reliability is the most important stated preference ahead of respectively ticketing, cleanliness, staff attitude and safety with all other attributes of minor importance.
- Frequency and reliability are around 1.4 times more important than the next attribute of ticketing.

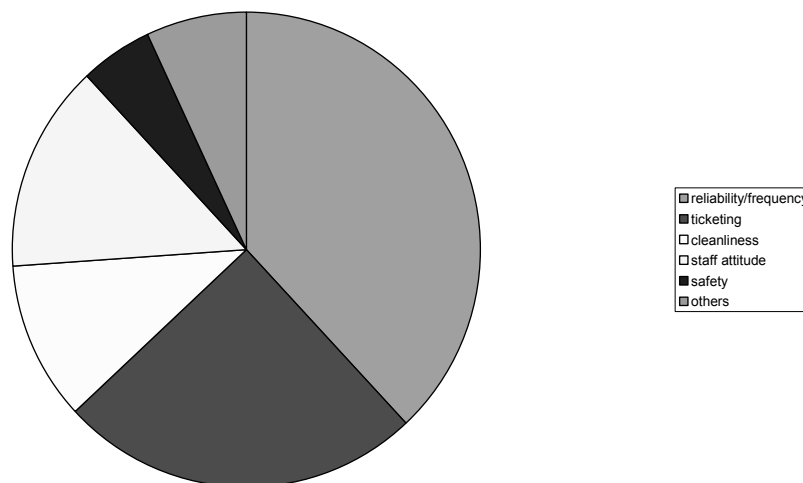
## STATED PREFERENCE IMPORTANCES – TOTAL SAMPLE

stated preference importances



- Results differed by age group with the over 60's ranking reliability/frequency more importantly than other groups. They also ranked staff attitude more importantly than cleanliness.
- It is significant that the over 60's are the most vulnerable to significant patronage loss in the future and therefore reliability/frequency and staff attitude are even more critical.

stated preference importances - over 60's



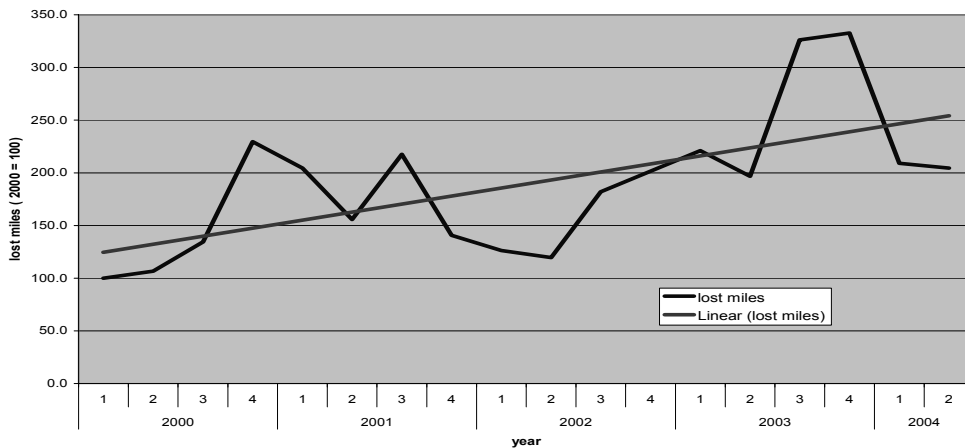
- Metro monitors lost mileage on tendered services both by surveys and by Operator returns. Since 2000 the level of lost mileage on tendered

services has more than doubled. Since the second quarter of 2002, lost mileage has been consistently outside the current Bus Strategy target of 0.5%.

- Tendered services mostly operate at times of low traffic volume and therefore the reason for lost mileage is less likely to be attributable to traffic congestion.

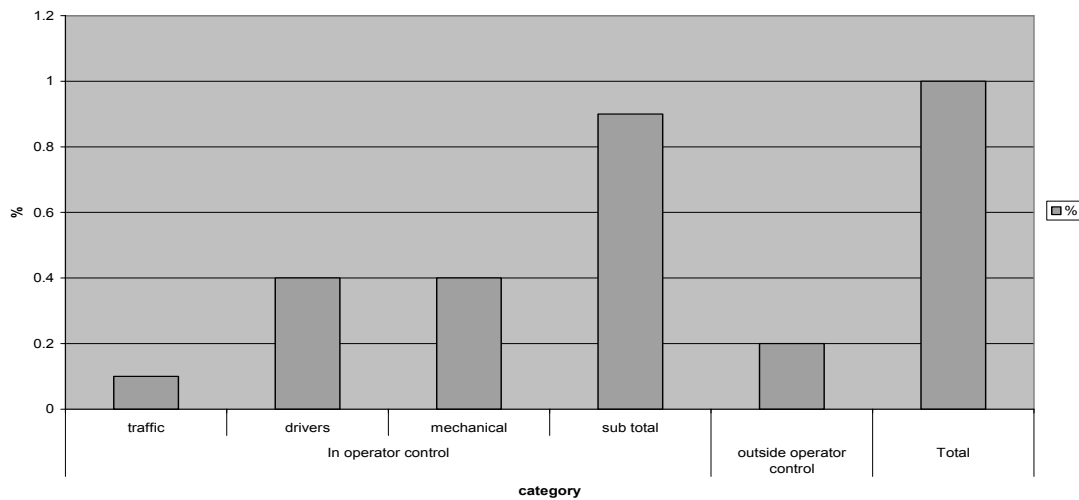
### Tendered Services, West Yorkshire

lost mileage actual and trend

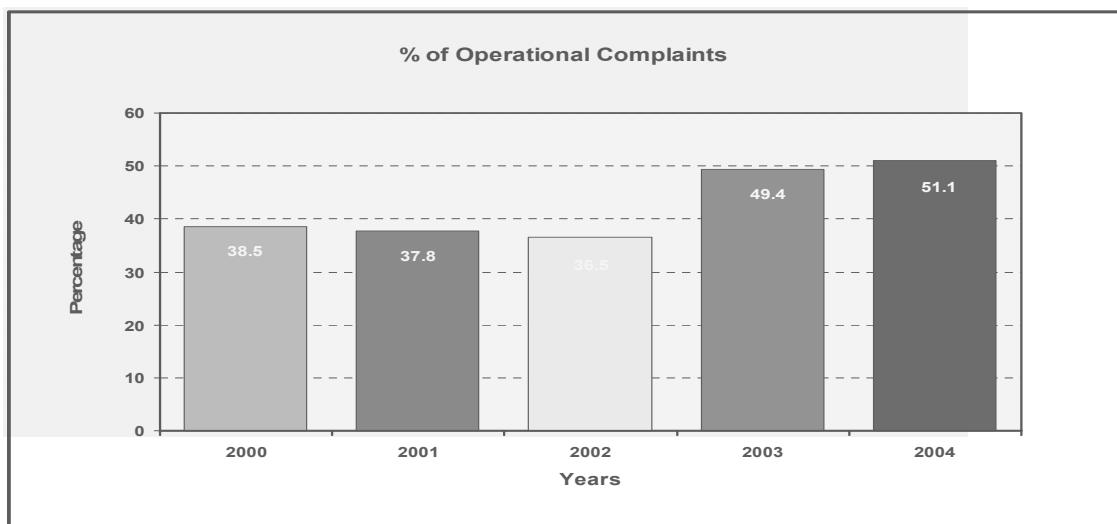
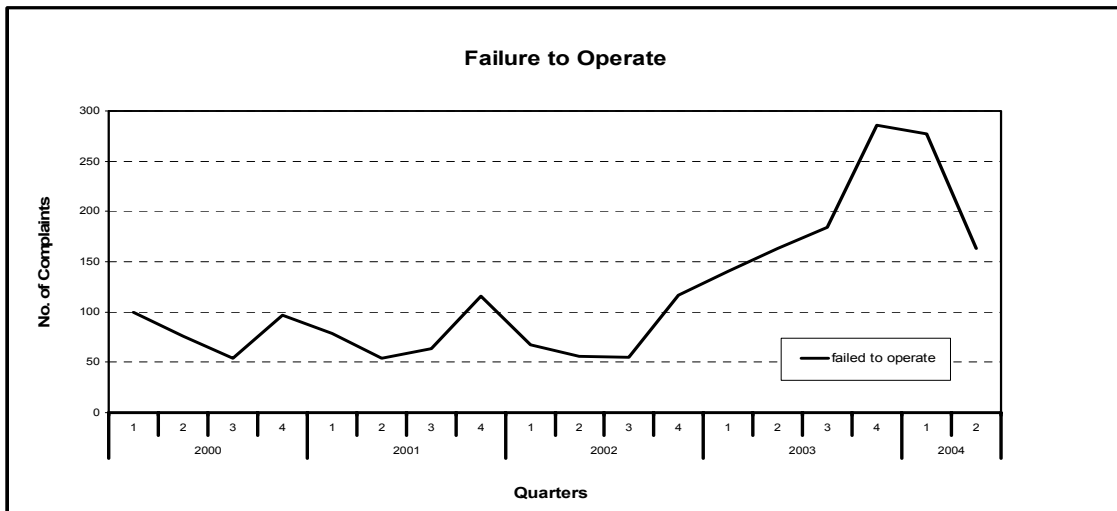


- The main reasons for buses not running are no driver, mechanical issues and traffic congestion. Nationally, excluding London, 90% of lost mileage is within Operator control. Although Operators do not provide Metro with the extent of lost mileage or the reasons, it is likely that the statistics do not significantly differ from the National (outside London) trend.

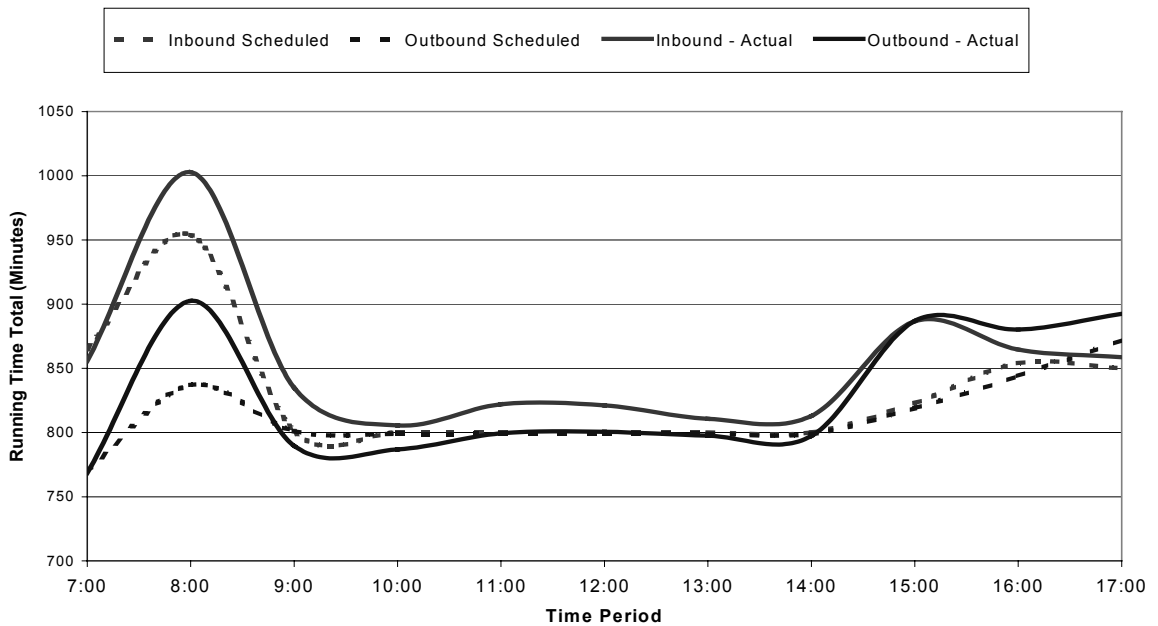
% lost miles by type jun/sept 04 outside London



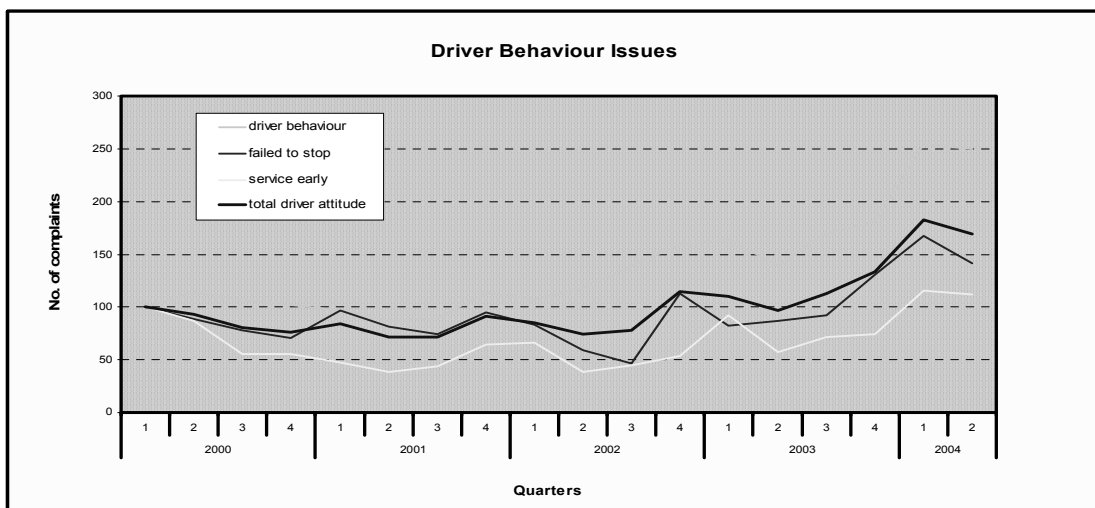
- Metro monitors commercial services against a target of 99.5% of services running.
- In the last financial year April 2003 to March 2004, Operators achieved a figure of 98.1%. This is the lowest reliability figure since Metro commenced monitoring in 2000.
- An indicator of the effect of this on customers is the volume of complaints. A recent survey by Metro has established that only 1 in 25 of frequent users bother to complain formally about an incident of unacceptable lateness/no show that occurred in the previous 7 days.
- Complaints of non-operation have grown. Also Metro receives more complaints about operational issues on bus services as a proportion of total complaints than ever before.
- In a recent survey, over 1 in 4 frequent passengers had suffered unacceptable lateness/no show in the previous week and almost half (49%) of passengers had suffered unacceptable lateness/no show in the last three months.

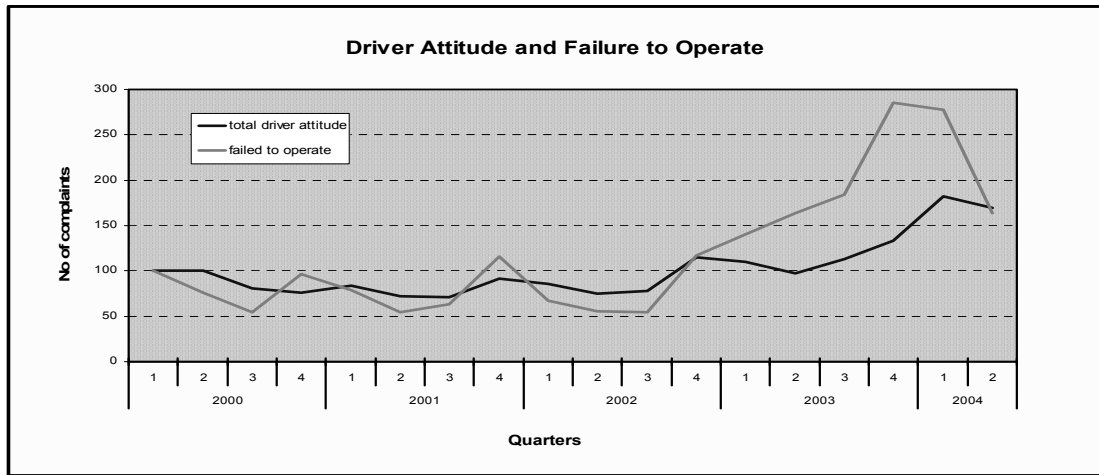


- There is also evidence from recent research in another PTE area that Operators do not always schedule realistically for anticipated delays, particularly at peak:



- There has been an increase in complaints about driving standards, early running, failure to stop and driver attitude. There is strong evidence that these complaints rise as a lag effect after an increase in non-operation.
- This would suggest that drivers are frustrated by non-operation.





- Some complaints of unreliability may be because passengers may not know about service changes. There is evidence that the number of service changes is increasing. In 2003, Metro published 248 timetables. In 2004, this had risen to 308, a 24% increase.
- Services that change on a very frequent basis undermine customer confidence as end dates cannot be put on to timetables. This means that customers may be in receipt of a timetable that is out of date.
- On one of West Yorkshire's main corridors, the services were changed five times between January and September 2004.
- To the customer, punctuality is also extremely important. The current bus strategy has a target of 95% of services operating within one minute early and five minutes late.
- In the year April 2003 to March 2004, Metro observed punctuality to be at 87.1% of journeys within the criteria. Punctuality has not achieved greater than 88.3% of services since the year 2000.
- In a recent survey by Metro, "respondents who consider their service to be reliable spend 40% less time waiting at their home bus stops than those who consider their service to be unreliable".
- This clearly increases overall journey time and is a factor in patronage loss.
- The report "Obtaining best value for Public Subsidy for the Bus Industry" for the Commission for Integrated Transport concluded that "Car users were likely to think that bus services were less frequent for the journeys they made than bus users."
- Metro has just completed (Jan 2005) a consultation exercise where respondents were invited to give their views on Public Transport issues. Of those who had a car, respondents were asked which measures did they think would encourage them to use the car less. Over half the respondents

said that “increased reliability of public transport” was a major issue. This was the highest response.

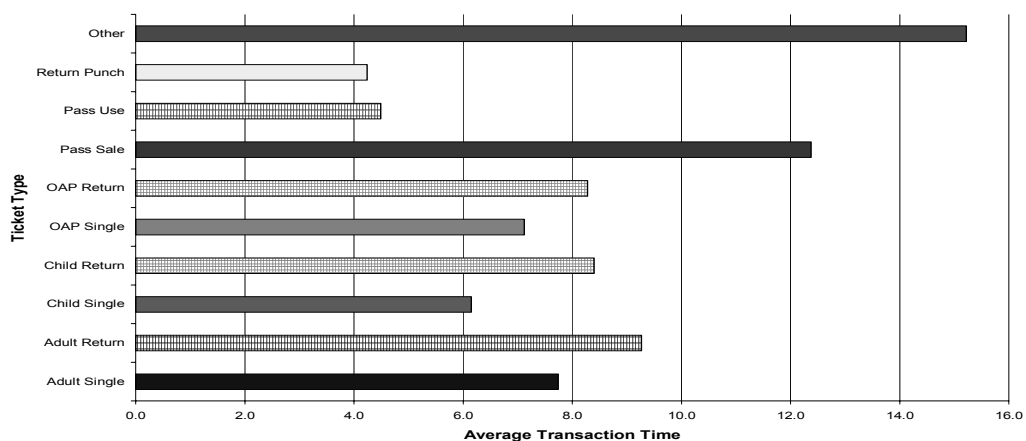
## D. Fares and Ticketing

- Pre-2000, there were basically two ways of paying bus fares - either cash or Metro’s own range of multi-journey, multi-operator tickets.
- In 2000, ‘Operator Only’ extended travel tickets were launched which now account for around three quarters of the pre-paid ticket market. These tickets were sold on bus. Single Operator tickets can only be used on their own buses and are therefore designed to increase each Company’s own market share.
- The current number of Operator only tickets is as follows:

NUMBER OF EACH TYPE OF OPERATOR TICKETS BY DURATION								
Day	Five day	Week	Month	Term	Three- month	Six- month	Year	TOTAL
37	1	19	17	3	2	2	7	88

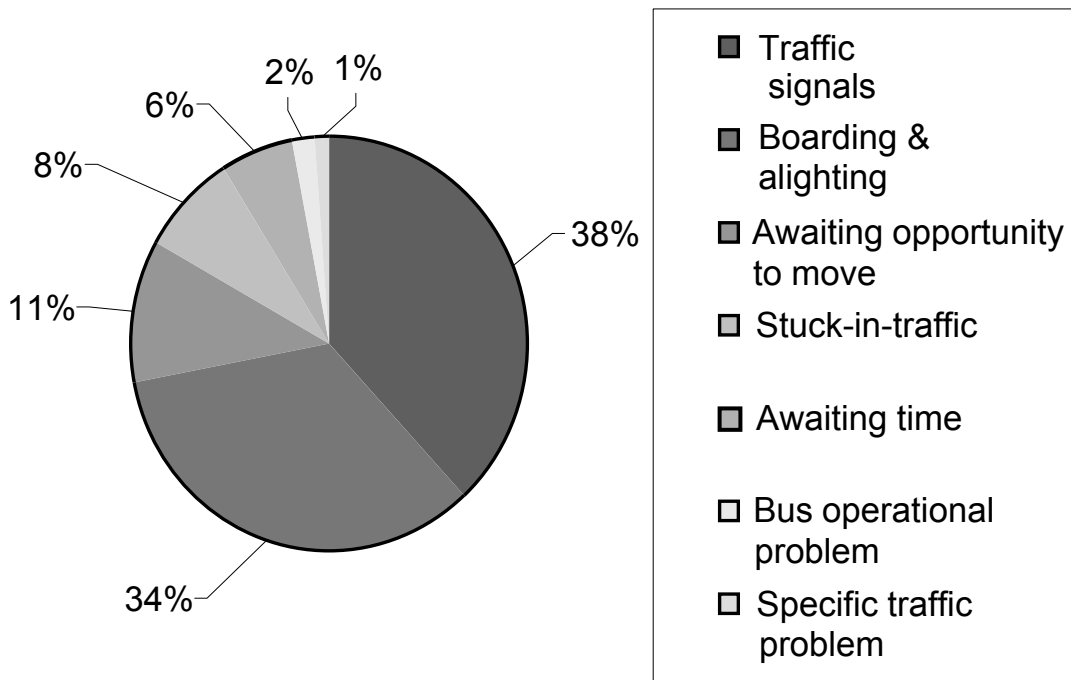
- There is a likelihood that some passengers are not receiving the most appropriate ticket for their journey and that the multiplicity of tickets are a barrier to potential new and occasional users. In a recent survey by Metro, 31% of a representative sample of users and non-users were not very confident or not at all confident that they had “the best ticket for you”.
- Of frequent (five or more days per week) users the equivalent figure was 29%. Very infrequent/non-users’ percentage was 56%.
- There is strong evidence to suggest that, on-bus ticket sales slow boarding times and reduce punctuality. This is substantiated by evidence from a recent survey where boarding times were assessed by different ticket types:

### Boarding times by transaction type



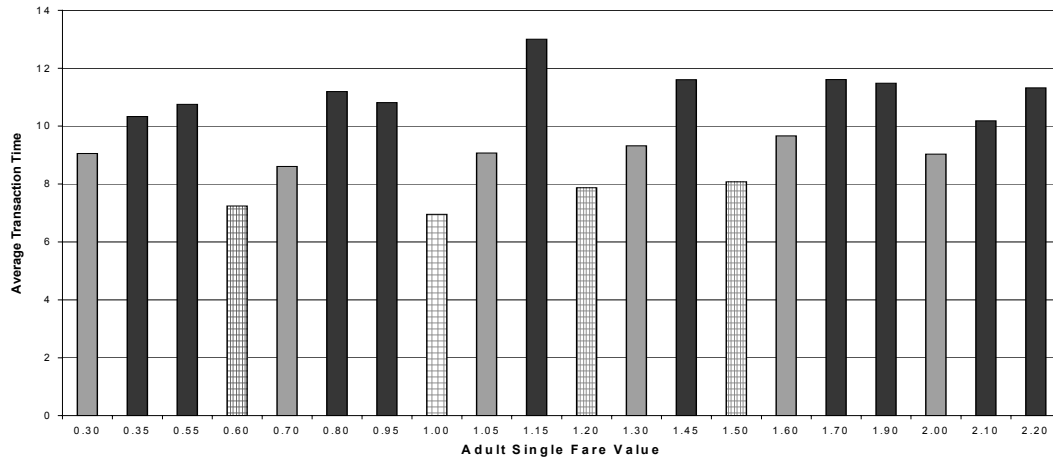
- Complexity of single fares also slow boarding times and reduces punctuality. Within West Yorkshire fares differ by Operator. At peak, single adult fares for the vast majority of passengers vary with the shortest journeys charged at 40, 45 or 50p, slightly longer journeys at 70, 80 or 90p, long journeys at 160, 170 or 180p and maximum fares at 180p or 200p. Evidence of this effect comes from a survey done by another PTE where 34% of waiting time was taken up with boarding and alighting, the second largest factor after traffic signals. It is also interesting to note that “stuck in traffic” and “specific traffic problem” only accounted for 10% of delays.

**Time spent stationary/below walking speed**

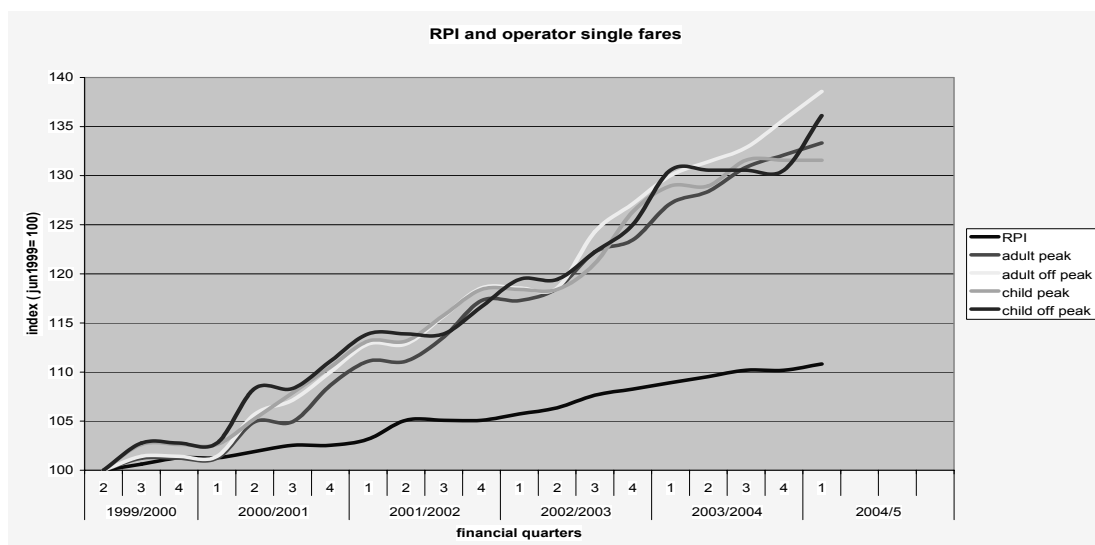


- The graph below shows the effect on boarding times in a recent sample in another PTE area.

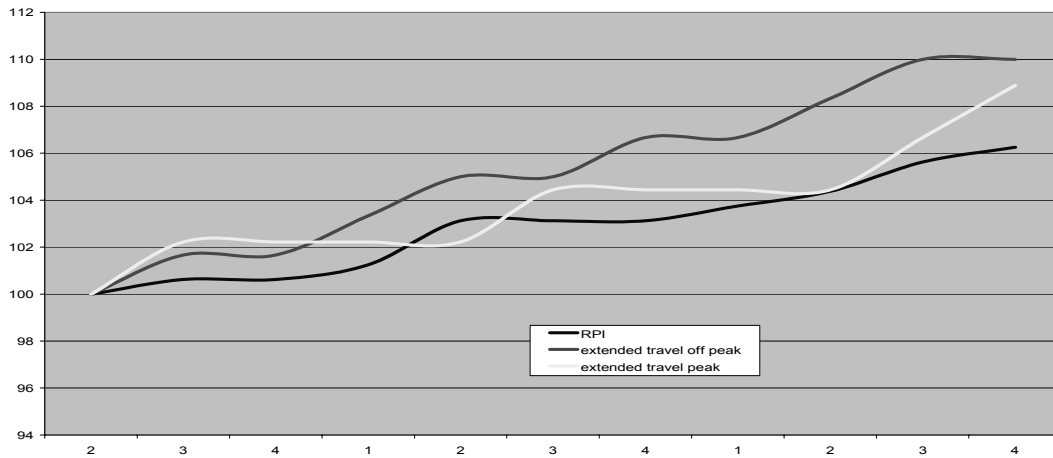
## Boarding times by fare values



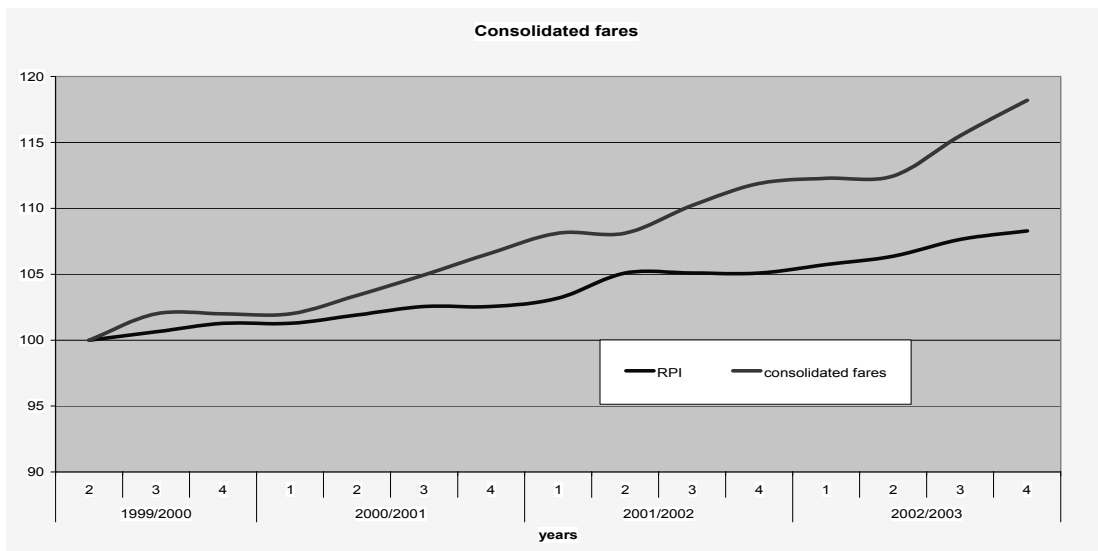
- Bus services are run by commercial Companies with the two main organisations in West Yorkshire being Public Liability Companies (PLC's). PLC's have to make a return on investment to satisfy shareholders.
- The costs of operation of bus services has risen by more than inflation over recent years with particular pressure on fuel, insurance and labour costs. The main way, under the present system, that operators can recoup these additional costs is by increasing bus fares above inflation.
- Since the second quarter of 1999, single bus fares (excluding concessions) have increased by more than three times the rate of inflation with the greatest increase in off-peak fares. Single fares still account for 60% of the adult and child market.
- Operator extended travel tickets are not good value for inner town/city areas where short single journeys are the norm. These inner town/city areas include wards of relatively high deprivation.



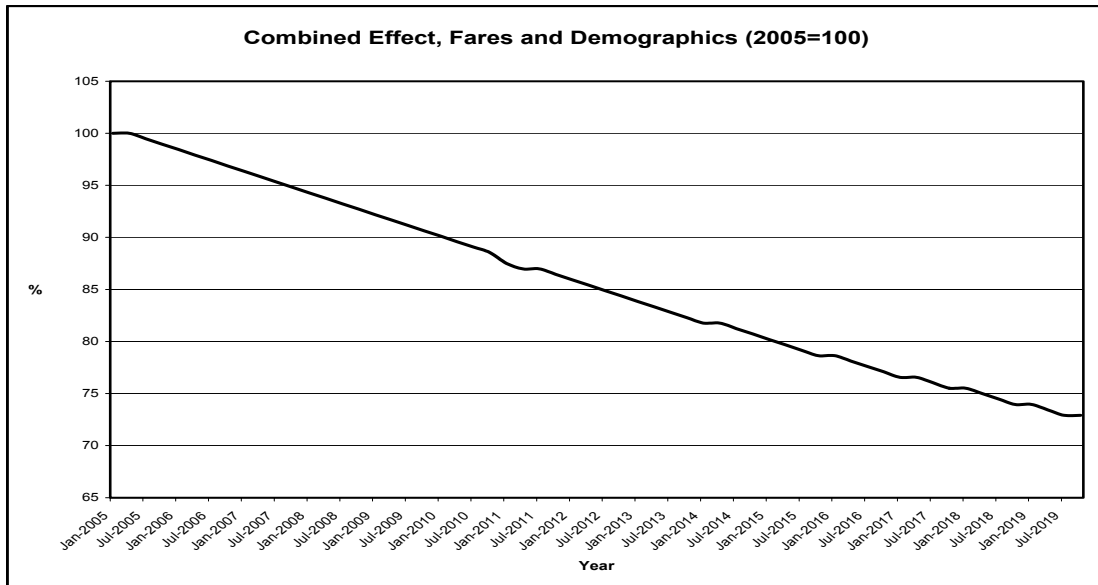
- Since their introduction, Operator extended travel tickets have increased by more than the rate of inflation.



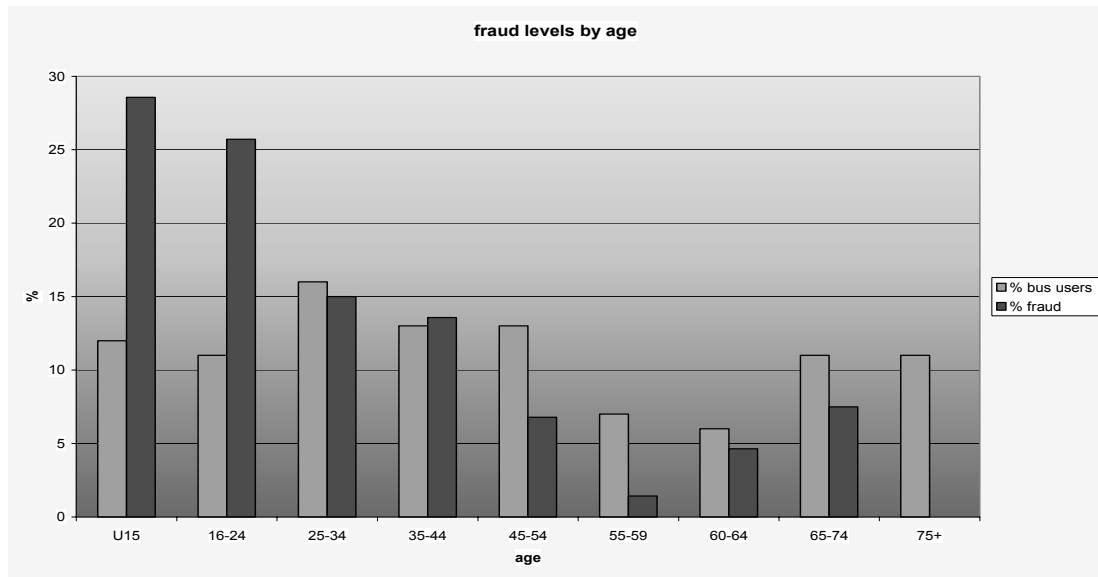
- Since the second quarter of 1999 all fares (excluding concessions) have increased by about 2.5 times the rate of inflation.



- New research from the Transport Research Laboratory (TRL) has suggested that fares elasticities of demand for bus services vary in the short, medium and long term. Using TRL's assumptions, the graph below illustrates the effect on patronage of previous fares increases by Operators and the likely effect if Operators continue to increase fares at current rates combined with demographic effects from the present until 2018.



- There is evidence that the greater complexity of fares, the greater the opportunity for fraud. A recent survey by Metro of 11850 passenger journeys estimated fraud at a minimum of 2.7% of passenger journeys.
- Over 50% of fraud involved people under 24 years of age.



- The relationships between Operators fall within the auspices of the Competition Act. This means that, under the present system, Operators cannot collude on fares including network wide promotions on commercial tickets.
- Network wide promotions would also be difficult because different Operators have different ticket machines with different configurations.
- Fares information is currently only available from drivers, operator websites and operator-own telephone lines. Fares information on all services is not available from travel centres, Metroline or Metro's website.

- There are no Metro products to suit people who use buses only for a few days a week. There is also poor flexibility on ticketing products for group travel.
- The report “ Obtaining best value for Public Subsidy for the Bus Industry” for the Commission for Integrated Transport concluded that for a journey by bus “The mean perceived bus fare (*to car users*) was greater than the mean quoted costs for making the journey by car, considering fuel, parking and other costs together.”

## **E. Network Issues**

- On the whole, individual bus services cover West Yorkshire at relatively good frequencies. However, there are a number of gaps where the services fall short of strategic requirements, some resulting from Competition Law requirements.
- One of the likely effects of increasing costs in the Bus Industry above inflation is that Operators will seek to maintain returns to shareholders by not only increasing fares but also by thinning out unprofitable routes and journeys.
- There is hardly any integration of bus services between Operators or between modes. In the case of rail/bus there are add-on tickets to the local bus network. However, in some instances, bus services competing on price run parallel.
- Interchange accounts for around only 6% of passenger journeys by bus. This is partly a reflection of the lack of integration and networking of services. Also around 70% of transactions are singles which mean paying twice to interchange.
- Metro has substantially enhanced physical interchange facilities over recent years. The low level of interchange therefore is more likely to reflect complexity of services and fares.
- Reliability and punctuality standards vary between Operators. Operators do not publish statistics in either the long or short term about their reliability. This affects customer’s ability to make informed judgements about journeys that involve interchange between Operators.
- It is very unlikely over the life of the new Bus Strategy that new railway lines will be built. Areas of significant population have been identified that have poor or inadequate access to rail where bus services could provide a strategic link. These have been indicatively identified below with further research required.



- Complexity is a significant barrier to access to bus use for non-users, occasional users and users who wish to make journeys beyond their normal route(s). The current service provision has no over-arching strategy on frequency throughout West Yorkshire and in some cases (particularly where there is competition) uneven headways.
- Cross boundary routes are limited and particularly in South East Wakefield District, do not provide strategic links for accessibility to Barnsley and the Dearne Valley.
- Tendered services account for 18% of the bus network. Since 2002, 7% of tendered mileage has been lost, as costs per mile have increased by 20%. The effect on total mileage in West Yorkshire is a 1.26% decline.
- As the costs of operation continue to increase, this decline is likely to continue. This may warrant a strategic review of the whole network rather than Metro simply continuing to give support where there is market failure.
- Metro receives, on average, 1.05 bids per tender. There is little competition on tendered services.

## F. Fleet

- 37% of buses in West Yorkshire are easy access, and 31% of the fleet is wheelchair accessible. This is ahead of National statistics.
- The Industry is committed to achieving 50% of the fleet to be fully accessible by 2010. At the current rate of replacement, this looks likely.

- The average age of the fleet in West Yorkshire as at March 2004 is 9.4 years, outside the target agreed with the Industry of 8 years. The average age has worsened from 8.5 years in March 2000, to 9 years in March 2003 to the current figure. This means that capital investment by Operators has been insufficient to replace the fleet and it is likely that Operators will not achieve the 8 year average target.
- Destination display standards and locations vary amongst and within Operators. The Disabled Persons Transport Advisory Committee advised that buses should have front and side destinations and ideally that the route number should be displayed on the rear of the bus.

## G. Accessibility

- The guidance on the Local Transport Plan sets accessibility standards that Metro should monitor against.
- Whilst accessibility across the County is good, there are particular issues in wards that fall within the 10% most deprived wards (18% of West Yorkshire wards) in the Country where accessibility by bus is generally less than the average:

<b>Measure</b>	<b>General population</b>	<b>Most deprived wards</b>
Access within 45 minutes to further education	73%	60%
Access within 15 minutes to a supermarket	66%	69%
Access within 45 minutes to a major centre	71%	61%
Access within 30 minutes to a district/local centre	88%	75%
Access within 20 minutes to a GP	80%	72%
Access within 45 minutes	65%	59%
Access to a minimum hourly service at peak	91%	74%
Access to a minimum hourly service off-peak	89%	73%
Access to a minimum hourly service early morning	35%	43%
Access to a minimum hourly service evenings	86%	71%

- There is also an issue around access to early morning bus services in that only 35% of the population have this facility.
- The Social Exclusion Unit states that 38% of jobseekers consider transport issues as a barrier to getting a job.

## **H. The Bus “Brand”**

- In October 2003 Metro undertook Market Research about Awareness of Metro’s role. The research concluded that “Knowledge of what Metro does is sparse: Metro is seen as something to do with bus and rail services”.
- 59% of respondents thought that Metro provided bus services, and 33% train services.
- It is clear that there is confusion over the role of Metro and the Operators.

## **I. Information, Promotion and Marketing**

- Timetables do not have an “end” date, therefore customers do not know if their timetable is current.
- Operators can change services with 56 days notice. Timetables have to be produced within this time period. This limits Metro’s ability to produce high quality timetables with additional information such as leisure or attractive or socially desirable facilities such as Health Centres etc.
- Only 6000 out of 14000 stops have information. A survey for Metro has shown that customers rate at stop information very highly.
- Metroline handle approximately 14000 calls per week. The hours of operation are 0700 to 2200. Although the hours have recently been extended, they still do not cover the hours of bus operation.
- Operators do not provide to Metro reasons for non-operation.
- Drivers do not have information on other company’s services or other modes.
- In 2003 new Conditions of Use were brought in for Metro Bus Stations. These required Operators to consult with Bus Station Managers before registering services so as to ensure that adequate information was provided and services could be allocated in the public interest.

- In the main, Operators have failed to consult. As an example, in changes at Huddersfield Bus Station in November 2004, the three major Operators changed services. None consulted the Bus Station Manager beforehand.
- There is no single one stop shop for information and quality standards vary.
- There is no collation of data on complaints and comments between Operators and Metro.
- The “Announce “system – next stop visual and audible announcements – is available on less than 5% of the fleet. Research on the pilot project showed that customer satisfaction increased with the system and that patronage gains exceeded the capital cost of the system.
- Travel centres provide information during office hours Monday to Saturday. Some customers are reluctant to use Travel Centres and some prefer to deal with a person at the point of boarding for reassurance.
- Information systems to show short term changes in Bus Stations are limited.

## **J. Bus Priorities**

- Bus priority schemes have developed slowly. This is partially as a result of the separation of powers between Metro and The District Councils.
- Lack of enforcement of bus lanes and other priority measures remains a major issue.

## **K. Bus Stations, Stops and Interchanges**

- Metro has successfully redeveloped most major bus stations in West Yorkshire to high class standards. The allocation of services that go into these interchanges is the responsibility of Operators.
- Bus/Rail interchanges are very limited in number.
- Retail standards in Bus Stations vary considerably.
- There are still 3000 sub-standard shelters in West Yorkshire.
- There are some locations where a shelter would be desirable but the current designs cannot be implemented. This particularly applies in rural areas, where access to power may also be an issue.

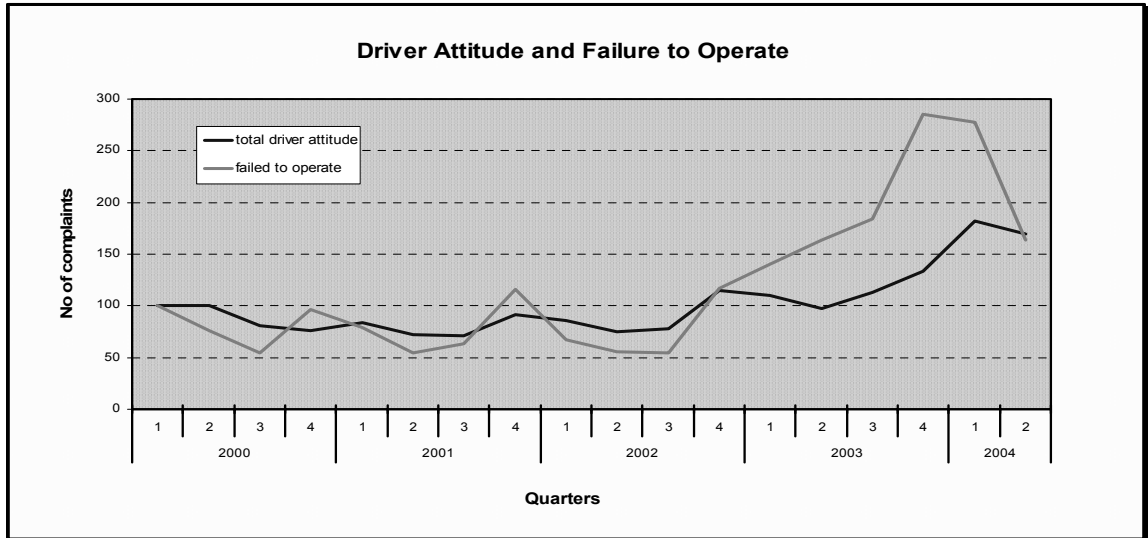
## **I. Safety and Security**

- In a recent survey by Simpson Carpenter for Metro, non-users of Public Transport felt less safe using public transport after dark than users. Also “Public transport users are slightly more relaxed about being on mode than non-public transport users”.
- In three recent surveys done by Simpson Carpenter, between 6 and 11% of Public Transport users said that they had abandoned a public transport journey in the last 6 months due to concerns over personal safety.
- In a recent survey in West Yorkshire, the following issues were identified.
  - a) The fear of crime rises after dark from 12% to 50% of Public Transport users.
  - b) Almost half of users said they modified their behaviour on public transport as a result of crime concerns.
  - c) There is evidence of restricted journeys due to safety fears amongst women and children.
  - d) The greatest sources of fear were drunk/rowdy behaviour, unfamiliarity and poor reliability of services after dark.

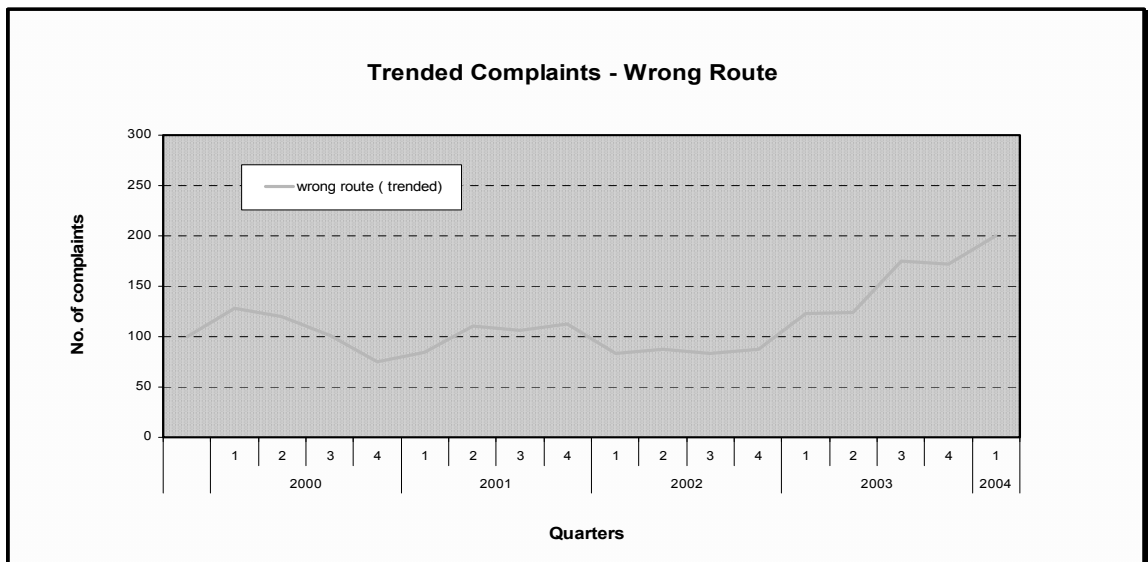
## **M. Staff**

- Metro recently commissioned a survey of staff in the Bus Industry in West Yorkshire focussed on the key issue of driver recruitment and retention.
- Nationally, the biggest cause of non-operation is lack of drivers.
- Rates of pay for bus drivers have risen on average by 14% in the last three years but staff turnover remains in excess of 20%.
- 93% of bus drivers are male. 93% are over 30. 58% are between the ages of 40 and 59.
- People are attracted to bus driving because there is job security, they like driving and it is not an office job.
- Drivers like about their job driving, shifts (for some), getting out and about and living close to the depot.
- Drivers don't like about their job passengers, running times, shifts (specifically changes in shift patterns), traffic/congestion and lack of support.
- Drivers leave because of more money, lack of support/value, lack of management, shifts, lack of training (new starters) and stress.

- Part time workers, under 30's and women are generally missing from the industry.
- There is evidence that drivers are frustrated by lack of reliability and this reflects itself in complaints to Metro about driver attitude.



- Complaints to Metro about drivers going the wrong route are increasing.



## N. School Transport

- Research for implementation of the Yellow Bus scheme identified a number of key issues:
  - a) Congestion at school gates

- b) High levels of traffic during term times
  - c) High and increasing car mode share for travel to school
  - d) Perceived stranger danger for children using commercial bus services
  - e) Bullying and anti-social behaviour on the bus
- Recent research by Metro identified that one of the concerns of Bus Drivers was Safety and Security on services that carries school children.

## **O. Environmental Issues**

- Although buses are inherently more environmentally friendly than the car due to their higher loading capability, in West Yorkshire there has been little experimentation with alternative technologies.
- The age of the West Yorkshire fleet at 9.4 years average means that the bulk of the fleet does not conform to current environmental standards for emissions.