Bus Strategy Appendix A

SUMMARY OF INTIAL (PHASE 0) ENGAGEMENT TO INFORM THE DEVELOPMENT OF THE BUS STRATEGY

Phase 0: September 2015

INTRODUCTION

1.1 At the very start of the process to develop the West Yorkshire Bus Strategy a number of one-to-one and small group meetings were held with some of the principal players in the West Yorkshire bus industry. These meetings are termed the 'Phase 0' engagement. Participants included representatives from all of the larger bus companies currently operating in West Yorkshire that deliver the county's bus services, and key officers from WYCA engaged in shaping and delivering the public sector's contribution to planning and funding aspects of bus services in West Yorkshire. The participants also included representation from other stakeholders on the Bus Strategy Board overseeing the development of the Bus Strategy, including accounting for the views of the District Local Highway Authorities.

1.2 These meetings were initiated to 'start the discussion' on the issues facing the bus sector in West Yorkshire. The conversations were framed through a *Discussion Guide* developed by JMP Consultants (see Annex to this Appendix). The discussions were therefore loosely structured around current issues facing buses in West Yorkshire, issues facing buses in the future, best practice, and the role of buses within the wider transport strategy for West Yorkshire. Consequently discussions were broad ranging, and participants were able to identify and examine a wide range of issues, concerns, and ideas that affect the bus sector and that will shape the provision of bus services within West Yorkshire in the future.

1.3 The outcomes of these initial discussions have been instrumental in defining the issues on which subsequent more formal stakeholder engagement has focused, and on which evidence has been sought and reviewed to inform the development of the strategy.

PARTICIPANTS

1.4 In seeking to understand the issues and opportunities to be addressed within the Bus Strategy in West Yorkshire, JMP met with the following:

1.5 Bus operators:

- Paul Matthews (Managing Director) and Paul Turner (Head of Commercial), First Group West Yorkshire
- Alex Hornby (Managing Director) and Geoff Lomax (Commercial Director), TransDev Blazefield
- Paul Lynch (Managing Director), Stagecoach Yorkshire
- Nigel Featham (Managing Director) and Jon Croxford (Head of Commercial), Arriva Yorkshire
- Steve Ottley (Area General Manager), Yorkshire Tiger

1.6 Within WYCA:

- Dave Pearson, Assistant Director Transport Services
- Neale Wallace, Bus Services Manager
- Alison Pilling, Information & Marketing Manager
- John Henkel, Director, Transport
- John Keady, SCIP Business Change Manager

1.7 Other Bus Strategy Board members:

- Tim Larner, Strata Consultants, independent advisor to the Bus Strategy Board
- Gary Bartlett, Chief Officer Highways & Transportation, Leeds City Council, representing the West Yorkshire district highway authorities

HEADLINE CONCLUSIONS

1.8 A number of themes emerged from the Phase 0 meetings, which in turn influenced the identification of some ‘core principles’ around which wider stakeholder engagement could be undertaken.

1.9 In reporting the range of discussions within these meetings, this note is structured in very broad terms, reflecting the headline themes that were reflected upon within the discussions.

1.10 Key messages and conclusions include:

- There is a strong message from both bus operators and public sector partners that the bus strategy must promote sustainable growth of the bus market;
- There is a strong sense of conformity that the offer must be dependable: punctuality, reliability, and stability being critical factors;
- There was a commonly held view that there needs to be simplicity around fares and ticketing, though there was less agreement between the contributors on the means by which this can be achieved;
- Some contributors feel that information provision could be improved, though again, there is no agreement on the quality of existing provision, and how best to improve that provision;
- There is unanimity on the need for a high quality customer experience. There is less common ground on what this means for the bus ‘brand’.

THE IMPORTANCE OF PROMOTING GROWTH

1.11 There is a strong message from both bus operators and public sector partners that the bus strategy must promote sustainable growth of the bus market. Growing the market for buses in West Yorkshire is vital for the long term future of the industry. There is therefore a sense that the ambition for the bus strategy must be one that seeks transformational change to promote sustained growth, and that all players within the industry support this ambition.

1.12 Bus Strategy Board members and WYCA officers in particular highlighted the importance of growth in bus use across West Yorkshire, both for the financial sustainability of the industry, and in supporting economic growth plans in West Yorkshire:

- “Growth is the priority that the bus strategy will need to follow and, in a way, the regulatory framework doesn’t matter as long as growth is achieved”.
- “Without growth, there can be no improvement. Growth is vital, otherwise we are simply managing decline”.
- Declining patronage, plus declining public expenditure leads us to “real trouble”.
- There is a strong sense that the ambition must be significant. “Regulatory change, in whatever form, must deliver transformational change”.

1.13 Operators understand that buses are vital to support economic growth. They also understand that the role of buses will be influenced by the future shape of our cities, and by economic growth plans and the extent to which those plans are realised. Operators are supportive of growing the bus market, and there is strong recognition that sustainable growth must be at the heart of the strategy.

1.14 This was tempered by perspectives of realism, both from the operators and WYCA officers. Operators identified that growth will require supportive investment in infrastructure as well as vehicles, and the cost of achieving change, especially without significant growth, was strongly emphasised. WYCA officers identified the influence of public sector austerity, and that “expectations need to be managed in terms of what we can afford”.

1.15 Overall, perspectives indicate that providing the right services or network, supported by effective operational delivery, can deliver modest growth. In a 'do-nothing' scenario, at best single digit growth levels could be expected to continue in some areas, and both operators and WYCA acknowledge that no transformational change can be expected in this situation.

1.16 There is also widespread recognition that tailored services that serve specific markets can help promote growth in the right situation, such as high quality park and ride provision to attract the car driver. The success of the Elland Road project was noted.

Faster journeys and improved frequency

1.17 When considering growing the bus market, the importance of factors such as faster journey times and improved frequency are important in going beyond the basics. One operator noted that "simple, frequent, direct" services works. "Improvements to frequency and to quality will drive growth". Frequency increases are also seen as helping to lead to improved perceptions of reliability.

1.18 Journey times are also seen as being an important part of this. "For a step change, and to promote real growth, improvements are needed to frequency and to journey times". Growth on inter-urban routes has been driven by speed of the journey: "it goes the way (by the same route as) the car goes" commented one operator on the success of its flagship high quality inter-urban service.

PUNCTUAL, RELIABLE, AND STABLE BUS SERVICES

Punctual and more reliable bus services

1.19 There is consensus amongst partners in the industry, both operators and WYCA, that basic aspects of bus services such as punctuality and reliability are fundamental.

1.20 One WYCA officer noted that "whatever we do, what works is getting the basics right: delivering a reliable service" this covers both ensuring that bus services consistently turn up when they are timetabled to turn up and also covers the variability of bus journey times. This sentiment is echoed by operators, with one noting that: "punctuality is a 'must'. Service reliability and consistency is vital."

1.21

Delivering fast reliable bus services

1.22 In addressing both delivering the basics of the bus service such as punctuality and reliability, and those aspects that might promote growth such as faster services, contributors reflected upon what needs to be done, and compromises that will have to be made on West Yorkshire's roads. The interaction of buses with cars and other traffic, and the priority given to buses, is vital if change is to be achieved. Both operators and WYCA expressed frustration in this regard.

1.23 WYCA officers highlighted the need for bus priority:

- "To make the bus work in the Northern Powerhouse context, the bus needs to provide a fast, seamless service. This comes back to 'the track'. It's about sorting out the 'pinch points'; doing the things that really make a difference."
- In terms of on-street road space for buses "we fight our corner for road space" but that car and other modes often get priority over buses.
- "The easy (schemes) are delivered easily; the bits that often matter that are critical to providing real priority are more difficult to deliver".

1.24 Unsurprisingly, operators share these frustrations:

- "The challenge to delivery in Leeds and elsewhere in West Yorkshire is congestion. The road network is nearing capacity, and there is a piecemeal approach to bus priority. There is little or no resilience to network disruption."
- "Bus priority to provide the speed, reliability and certainty is important, and a consistent approach to priority is needed. This is not always forthcoming from the local highway authorities."

1.25 There is acknowledgement from the local highway authorities that delivery on priorities is mixed, with some successes (such as A65 Kirkstall Road) tempered by a less success elsewhere. However, the reality is that "politicians need to be convinced of the benefits of priorities in generating growth" (before prioritising the bus over other modes). More needs to be done in providing the evidence to make the case, but equally it is difficult to justify priorities which have a negative impact on the remaining road users (i.e. the majority that choose not to switch).

1.26 WYCA officers understand this need for balance:

- "If speeding up the bus is what people want, sacrifices for other road users may have to be made."
- "Bus lanes work, but conflict with other users is an issue, as buses often compete for the same space with other modes, such as bikes, as well as competing with general traffic."

1.27 And there is an understanding from all parties that sometimes very local priorities and sensitivities do influence approaches to priority:

- "The argument for balance is viewed as an attitude in some places that there is an approach to manage the car traffic and let everything else fit around it."
- "Districts are nervous about removing on-street parking, or otherwise reallocating space."
- "There is also acknowledgement that projects that deliver benefits to buses, but that are broadly neutral to cars, have been the focus of what has been delivered."

1.28 The emergence of the West Yorkshire Transport Fund and the partnership to deliver investment through this fund is however seen as a positive step going forward and this "is starting to mean there is more importance attached to (bus priority) measures, and this represents a real positive opportunity."

1.29 There are divergent views on priorities on signal junctions. There is some good experience. However, others see limited benefits, as priorities are seen as being used only get buses back on time, with no effort to maintain/improve bus journey times.

1.30 One operator suggested a way forward would be better co-ordination with the management of Urban Traffic Control (UTC) systems, with revisions to introduce "bus friendly rules" in managing UTC. It was also suggested that the direct involvement of operators in UTC 'control rooms' (as in Bristol), and regular dialogue on improving the service provided by UTC, would both be beneficial to bus services.

1.31 Enforcement is an issue that frustrates partners in the industry. One WYCA officer noted that "there is a need to continue to "enforce priorities where they exist".

1.32 Reliability is critical, especially so where frequency is low. Infrequent services, such as early morning services, are often a source of complaint when unreliable. The critical nature of these services highlights the importance of the issue when things go wrong.

1.33 It is widely acknowledged that buses spend far too much time at bus stops allowing passengers to board. Boarding speed is critical to improving journey times to provide the faster services that are desired. One operator noted that "there is a desire to reduce passenger boarding times, as bus dwell times need to be reduced." The solutions to improving boarding times were often linked to ticketing, which is addressed later in this review.

Stability in the network

1.34 There is recognition from contributors that the bus network in West Yorkshire has in most areas been structurally quite stable. For example, the service 110 has operated on the same corridor for many decades.. It was noted that there is a comprehensive network, providing access to many communities across the area with it being noted that "access to the bus network in West Yorkshire is good. Most people are close to a route of some sort."

1.35 However, it was also clear that there are still regular service/network changes across West Yorkshire, often taking place every few months. There were also views that "managing the system to a steady state, limiting decline, is not an acceptable outcome." Delivering the local economic plan requires the bus to do more.

Functions of the 'bus network' and markets served

1.36 Expectations of 'buses' and 'the network' differ in defining the context for this Bus Strategy. The views of operators and the public sector contributors can diverge, and indeed there is no simple split in the views of operators and the public sector in identifying what expectations are. This speaks to views on the role of the bus, and there is some degree of divergence of views from contributors on what buses should be asked to do. There is a broad spectrum of views even within WYCA itself. There is also a caveat here that no customer perspectives were sought at this very early stage on expectations of the network.

1.37 The public sector does see the bus network as part of the wider transport network in West Yorkshire, and there is a desire for it to be integrated with other types of transport. In this respect WYCA desires that buses respond to the broader economic, social, and cultural needs of the communities that they serve, as a public service.

1.38 One WYCA officer noted the importance of buses identifying that "the bus is the primary mode of travel for many people in West Yorkshire." Another WYCA officer, while noting the importance of developing an approach to transport in West Yorkshire that provides end-to-end journeys, effectively as part of a network, emphasised that "supporting the onward journey is one thing, but the local journeys made by bus are matters in their own right. The bus is not just about add-ons to train journeys between cities". Indeed, one officer speculated that "there is also little evidence of there being much bus-to-bus interchange. There is a view that most bus journeys are on single buses, which results in organic growth of key linkages, and, for example, the success of the cross-city routes is built on this."

1.39 There is a tension in the views expressed around the bus in West Yorkshire. Is it the primary, single mode for people making local journeys? Or is it part of a wider functioning network of bus-to-bus and multi-modal journeys? Or both? Or something else?

1.40 One operator summed up this dichotomy by identifying that "there is a sense that a 'comprehensive' network that tries to do too much in terms of serving 'all' markets is an aspect of the bus provision that deflects from investment that could deliver growth on simplified, core routes." Another operator suggested that "we do sometimes ask the bus to do too many things at once".

1.41 One area where views of all contributors are aligned is that there is a relationship with other transport policy and implementation. City centre car parking policy, in terms of availability and cost, is an obvious influence. How buses interact with other modes is also an important aspect. This is in terms of interchange, but also in terms of role. One contributor noted that buses must not try and do things that other modes are better suited to, but need to be a coherent part of wider strategies. In other markets, sometimes it needs a smaller bus, or a taxi, to better serve the market.

1.42 It is acknowledged that the bus does serve many markets, and journey purposes, with a number of different types of service. Operators identified that some markets, in particular the urban network in Leeds, are growing. Both operators and WYCA acknowledge that while Leeds is presently a buoyant market, the rest of West Yorkshire is less so with performance being patchy. Some areas are seeing small levels of growth. This is attributed to “some economic influences, some service improvements, and some fare reductions”. Others are less successful.

1.43 There is widespread acknowledgement that buses serve city centres, and city centre markets, well. Buses work well in a concentrated geography:

- “The strength of the bus is mass movement”.
- “In a sense the ‘Metro-style’ network already exists!”
- “The strength of Leeds is the core, strong, busy network: ‘metro-style’ services”.

1.44 Operators reflected upon some of the differences, and asserted that a ‘one size fits all’ approach to bus strategy is not therefore regarded as appropriate across the whole county, and the bus strategy needs to reflect these potential differences. For example:

- “Leeds is the primary driver of growth in West Yorkshire, and has been for the last 2 years”
- “Halifax also has a sound market, if very different (to Leeds)”
- “Bradford diverges from this picture (of growth). Bradford has seen decline in patronage. The reasons are unclear, but are certainly complex, possibly linked to demographics; its position adjacent to Leeds; and retail and economy factors”
- Markets from Keighley and Harrogate are also identified as “having distinct differences”
- “Service is governed by spatial variations, with each place being different”. Accordingly, the provision of services is “driven by the market forces”, which determines the level of services in these areas.

1.45 A variety of views were put forward on specific markets that buses do, or could, serve. There is common ground that providing a network that effectively serves out-of-town development, whether employment or retail, has proved challenging. One officer noted that “there is little evidence of this working well, except where the out-of-town development lies on existing routes and forms part of the network.”

1.46 There are mixed views on inter-urban services. One WYCA perspective is that “strategic links that aren’t served by rail need to be provided by express bus”, and an operator noted that “the inter-urban services have had the highest growth rate in recent times”. There are counter views on a focus on inter-urban routes, and expectations that people will be able to take up employment across a wide area facilitated by such routes “is ambitious for a bus”.

1.47 WYCA officers noted that education is a difficult market to categorise, as the approach to funding and admissions varies greatly from place to place. Very different policy approaches exist in LEAs across the county, with for example Bradford having a flexible approach to admissions. In terms of health related services, there is also a sense within WYCA that this is not easy. Development and change to health service provision can influence travel patterns, but it is often hard to keep up with the complexities of these demands. One officer noted that *‘Total Transport’* brings “worthy approaches, but buses often don’t change fast enough to meet changing needs of the health service users”, and that “there is a danger that you can end up chasing this, with little success.” It was therefore questioned how much detail is needed on health and education provision within a strategy such as this, and that “employment and retail are the markets (and networks) that we should be focusing on (in the bus strategy)”.

1.48 When providing networks and services for new employment activity, there is a common perspective that it is critical that buses are present from the start. One WYCA officer noted that “buses must help shape travel patterns” and that “there needs to be closer links between planning and bus services.” There is acknowledgement that at present it is difficult to justify as there are no guarantees on bus routes. As a result, there are places where the network could much better reflect changes to land use/demographics.

1.49 In terms of planning future bus networks to meet economic and growth plans, one operator asked “what do we want our cities to look like? This will influence what communities want and what our bus provision will look like. If there is a radical change in city land uses, this will influence the numbers travelling by public transport, and so the shape of provision.” The operator concluded that “the extent of growth, and therefore the shape of this strategy, will depend on the appetite and support for change.”

1.50 When addressing the network in terms of employment, an officer noted that “we need to consider what the network looks like to be useful to workers in the context of changing working patterns, with flexible working, more part time working, and accounting for shift patterns.”

1.51 Evening services were noted to be in decline everywhere except Leeds. A WYCA officer noted that the interface between the commercial and subsidised network is crucial, with the point at which service frequency drops being important. Operators do acknowledge that evening services are an important element towards encouraging use. “We finish a little early in places” suggested one, and “extending the service will help provide flexibility to customers”.

1.52 One officer noted that “there is a strong demand from 10-4 on Sundays; service is now at Saturday levels in some places, mirroring Sunday trading patterns. The missing element is earlier and later buses to allow retail workers to get to and from work.”

1.53 WYCA has a positive view of the ‘market town’ networks in the county, which are regarded as a success story, especially in comparison to more rural networks elsewhere in England.

Data supporting market identification and planning

1.54 Perspectives on the data available on the network are strong. There is considered to be too little ongoing intelligence on what is going on across the bus network in West Yorkshire. For example, there is a view from the Bus Strategy Board that “the approach to market segmentation and the network has focused too much on supply and not enough about demand”. This is acknowledged by one operator that noted that while “operators now have good data on operations, with good knowledge of where buses are, and where problems occur on routes” there was a “gap in customer data”. Public sector contributors noted that “richer data sources are emerging to help planning, and these need to be embraced.”

SIMPLE FARES AND TICKETING

1.55 Fares and ticketing are aspects where the contributors to this early phase of engagement diverge in viewpoints to some degree.

1.56 Operators and WYCA do agree that there needs to be simplicity around fares and ticketing. One operator confirmed this: “Customers want simplicity.” The operator acknowledges that presently “fares could be seen to be complex because of the variety of products offered at present, so the company is attempting to provide simple fares.” In this instance “the focus is on the weekly fare and the day fare.” The operator asserts that “this provides simplicity and convenience.”

1.57 That “ticketing needs to be simple, and easy to understand and use” is acknowledged by operators. One aspect of this is flexibility. One WYCA officer identified that “bus ticketing needs to respond to the flexible needs of people. This includes the changing needs of people through the course of a day”. Operators don’t dispute this, with agreement that ticketing “needs to be flexible to changing passenger needs, including through the day, responding to changing needs in real time.”

1.58 Poor knowledge of fares and tickets by customers is identified to be an issue by operators. One operator recognised that “customers want to know how much it costs, and how they can pay, including whether by credit card.” WYCA officers noted a number of issues, including that “ticketing can be a barrier to entry. There is often no obvious way of finding out about the ticket or fare that is the right, or best, one for customers." The complexity of tickets has been identified as being off-putting to new customers. "There are too many barriers to ticket purchase, potentially including conflict at the point of sale (with the driver). Tickets should be easy to buy".

1.59 Contributors do understand that there are challenges in meeting the needs of all customers, including varying views on fares structures. An operator noted the challenge that "some argue ticketing acts as a barrier to use because people aren't aware of the fares and a simple flat fare would be easier to communicate." Yet "others complain because the single fare structure is quite coarse so sometimes people complain that where a 3 mile journey is priced the same as a five mile journey, the former is overpriced."

1.60 The influence of ticketing on boarding times was explored by contributors. Operators acknowledge that this is an issue with one noting that "boarding times have been influenced by growth of weekly ticketing". While this has helped through much of the week, one operator acknowledged that "the Monday morning problem of time spent on selling these weekly tickets remains an issue." Another operator suggested that "Smartcard hasn't helped, as the technology is no quicker than showing a paper based ticket" and that there was an ongoing need for "a contactless, smartcard, pre-paid system, in order to reduce cash payment".

1.61 Some operators continue to emphasise the importance of cash payments for their customers. One operator advocated that "there should be no dash to cashless payment in entirety" noting that "the single ticket option remains important"; another identified that "cash fares remain important and most fares are still on-bus cash payments."

1.62 The structure of ticketing and the development of multi-operator tickets is an area of some contention. From WYCA and Bus Strategy Board perspectives the argument is straight forward, illustrated by one view "that ticketing barriers have been created by operators with local products". Another identified the ticketing system as "a barrier to multiple leg bus trips", the argument here being that why should an customer be charged a premium if they happen to need to travel on two different operators' buses

1.63 There is a greater variety of views from operators. One operator, while accepting that multi-operator tickets provide a ticketing product "that is more coordinated and smarter" and that "multi-operational tickets aid the market and increase potential user quantities" in some instances, tempers this view by noting that while "public sector partners want more simplicity and the removal of some cheaper, single operator products" this "will remove choice for those who don't need the one-product-covers-all option, and will increase costs to the user". Even one public sector contributor acknowledged that "the reality is that multi-operator tickets will put fares up for some users, for example in Halifax".

1.64 Another operator while supporting simplicity confirms that customers "also want choice". The operator went on to note that customers do "understand that different parts of a journey are different" in supporting the presence of single operator tickets. Conversely, one operator "does not see integrated ticketing as a barrier towards generating revenue. It's a way to get more people to use public transport services."

1.65 Affordability of fares is another topic explored by contributors. One officer noted that 'the idea of a maximum daily fare works well", a concept that can be delivered through technological solutions. However, the officer went on to note that "ticketing is however not just a matter of technology", and in terms of affordability and value "selling the customer the correct, or best ticket, is an issue. People must have confidence in the ticket they are buying." Another public sector contributor asserted that "the vision should be around smartcard technology, with cheaper travel as you travel more with high discount for regular travellers".

1.66 'Smart' is a term used often by all segments of contributors with respect to fares and ticketing, but its precise meaning is unclear, and appears to mean different things to different people. One thing that is clear, as recognised by one operator, is that "technology improvements will influence ticketing in future".

Some successes in bringing technology to the fore are highlighted, one officer celebrating the fact that "smart systems are highly developed, with 95% of buses having smart readers." However, the 'Smartcard project' is seen "as difficult because there are four different types of technology; there are governance and data ownership issues; and there are difficulties in identifying where the money goes."

1.67 Looking to the future, there are a number of perspectives on how technology can help. One operator believes in terms of ticketing this "is likely to be through the phone". Another felt that "there is a need for a contactless, smartcard, pre-paid system, in order to reduce cash payment". A WYCA officer summarised that "smart ticketing is clearly the way forward, in some form. The future also needs to include smart information, backed by some form of customer relationship management database." Nevertheless, it was acknowledged that the "customer relationship management aspects of a unified product or brand are still at a formative stage".

INFORMATION

1.68 There are contrasting views on the quality of information for buses in West Yorkshire.

1.69 One operator is unimpressed. "Information in West Yorkshire is an area that could be improved, as it is quite traditional in appearance, lagging behind other aspects of service provision, which are in many cases better than other parts of the country". This results in the operator duplicating efforts and resources to provide its own information too, as "more specific information is required focused on our customers". The operator believes that "West Yorkshire needs to innovate to reflect changing needs and expectations", and pointed to examples of good practice, including from places locally, including York, that could be adopted. A number of operators do provide their own Apps, and some operators supplement these with their own web-based and leaflet information, especially for new initiatives.

1.70 Counter to this, another operator indicated that the information provision "before the journey, such as App-based or web-based information, and information at stops on routes, is generally very good". Indeed, one operator noted that "bus stop information in West Yorkshire is good quality with an excellent text service that updates passengers immediately". However, another operator regarded "information in city centres as the weakness, whether with respect to destination information, connections to buses at stations, or for other onward travel." Examples such as the London on-street maps, including at bus stops, are cited as best practice. More generally, a number of contributors noted that there are lots of good practice examples in information provision on which West Yorkshire should build.

1.71 It was suggested that information can be best delivered by a variety of partners, and indeed that WYCA and operators may not themselves be best placed to develop all platforms: "A West Yorkshire wide App would be useful, but better coming from the market and expert developers."

1.72 This last point reflects on the increasing importance of smart phone use and Apps in customer practices. All contributors acknowledge the need for information to be delivered across a broad range of platforms, including on-line and social media channels. There is an increasing expectation, driven by customer practice, "that information is self-serve". Information needs to respond to these changing needs and expectations and must be flexible. One operator identified two aspects concerning digital information: "it must be real-time data and it must be about the wider network." The digital information that is provided must not only "provide details of future network improvements and new services", but also "seek to integrate the digital demands of new and existing users".

1.73 Existing real time information provision is well regarded. One Bus Strategy Board member noted that "people like real time information", but that the information provided to customers must be real, and accurate. Another confirms this: "it needs to be real time information, not merely appearing to be real". Expectations of real time systems are increased because of the availability of other systems and information in other sectors. This raises expectations of public transport and specifically bus systems, and has led to some concerns. One operator noted that “some passengers lack confidence, even though it’s often correct, as it isn’t 100% reliable.”

1.74 Another aspect of real time information that has been identified by contributors is that better information on service disruption is required, in real time. “The impact of road-works and other disruption is a frequent source of public complaint” noted one officer. Information on disruption is therefore an important aspect to get right in a timely manner, especially in the context of the rise in social media use and expectation of instant information. One operator now “uses Twitter extensively for service disruptions to provide information to its customers”.

1.75 “Information provision could be better if it didn’t change so often” note some WYCA officers. They view the focus having too often been driven by meeting the needs of the quantity of change accurately, rather than on improving quality: “more could be done with a more stable network”.

AN EXCELLENT CUSTOMER EXPERIENCE

1.76 The quality of customer experience is at the heart of the concerns of a number of Bus Strategy Board members. “Basic hygiene factors need to be right: comprehension of the product in terms of frequency, route, and fares” is a primary concern of one contributor. Another noted that “basic standards of customer care need to be in place: helpful and human”. Confidence in the bus ‘brand’ is seen as “being driven by consistency across basic factors.”

1.77 There are a range of views on what customer expectations are, and what actions may be necessary to meet those expectations. In terms of expectations one contributor from the public sector believes that “a customer focused approach to bus services is important. Customers want basic aspects to the service to be right, but also want ever improving standards of service, with provision of Wi-Fi and other improvements reflective of modern living being high amongst expectations.” This is echoed by an operator view that “it’s all about the customer”. To this end, the enhancement and improvement of the quality of the operator’s services is based on “tailored improvements to meet the specific needs of customers. Quality is important in the bus product: high quality vehicles; clean; frequency is important; high quality drivers providing good customer service.” The operator went on to say that “there is a strong emphasis on making the bus a retailer and packaging the bus as a product, or brand.”

1.78 Counter to this one WYCA officer offered a perception that “customer service comes below the bottom line for much of the bus industry. There is no realisation that most sectors and businesses operate the other way around”.

1.79 The public sector contributors believe that there is a large disparity between the views of people that currently use buses, and non-users. “There is not enough focus on non-users” and “people who don’t use buses presently quite often simply don’t know how to use the system” are typical of comments. There is a belief that non-users have perceptions of bus services that are very different from those of existing passengers, and that building understanding and confidence amongst people who don’t currently use the bus will be important. Furthermore, low expectations of the service for many users drive some perceptions of service quality with relatively “high satisfaction scores being influenced (inflated) by low expectations.”

1.80 Contributors discussed various aspects of service that influence customer perspectives on bus services. One operator identifies that “the human factor is a very important element of the service. Bus driver service quality is a factor in encouraging new customers and retaining existing patrons. We recruit drivers for attitude, and then teach them to drive a bus.” In understanding the needs of customers, that operator also recognised that “around a third of customers identified the need to continuously improve to keep the product attractive. Aspects such as improving the App, payment methods, provision of phone chargers, tables, may form part of the future”. Furthermore, customer satisfaction improvements are “likely to be the sum of marginal gains”.

1.81 Extra buses, Wi-Fi, comfortable seating, and driver training are all regularly mentioned in respect of the customer experience. Wi-Fi is an aspect that is highlighted as being popular on buses. One operator noted that “investment in Wi-Fi has had a huge (positive) customer response”. Another identified that “Wi-Fi and USB ports are important, and have been introduced on-board buses to appeal to the younger generation”. Another contributor suggested that bus stations would benefit from having Wi-Fi too “to catch up with the times”.

1.82 One aspect of the overall customer service that generated comment is the quality of the streetscape and public realm that contributes to bus services. The quality of bus stations, shelters and stops in West Yorkshire is broadly regarded as good or better, though “city centre interchanges need to establish a (better) sense of place”. One aspect of bus stations that was identified as an area for improvement was “retail spaces, which are poor, with too little investment in updating”. More generally in respect of town and city centres contributors had concerns about the place of buses. It is accepted that to make places and spaces that are attractive for people often requires the removal of cars, and other vehicles. “How does this fit with buses? The bus needs to deliver people close to their desired destination” opined one contributor. “How far can we push buses to achieve the places we want, but not so far that it becomes an access problem?” One specific example is stop infrastructure in Leeds where there are not enough stops because “bus stopping arrangements keep getting squeezed by other modes and land uses”.

1.83 Modern, clean vehicles are an important aspect for customers, and the public authority contributors particularly emphasised this with respect to addressing air quality issues in West Yorkshire towns and cities. Air quality is an issue that is a high priority for local authorities, including in terms of addressing engine standards within buses. The bus fleet is regarded as only being “average in terms of emissions as compared with other areas”. The investment in such vehicles has been “driven by the Green Bus Fund and by some tenders” and WYCA contributors would like to see more investment industry wide putting buses at the centre of the solutions to air quality issues. Operators do appreciate this issue, with one noting that “people’s perceptions are changing: younger people are looking for cleaner, greener and smarter vehicles”.

A unified brand

1.84 One aspect where there is a divergence of views between operators and public sector contributors is around brand. This starts with confusion over brand. Brand recognition is mixed: quite good for some brands; poor for others. However, there are lots of brands in the market place, and “there is often confusion over who does what (operators, Metro, etc.)”. One view from the public sector on the bus brand is that it is hindered by limited investment: the “marketing effort is poor”.

1.85 One Bus Strategy Board member cites that “understanding who can help when things go wrong is not well understood by customers”. Accountability, or the one-stop-shop, for bus customers and in addressing things that might go wrong, is a problem. It is not clear who is responsible, or where complaints should go. This was identified as “the lost umbrella conundrum”.

1.86 Some public sector contributors believe that we can learn from best practice in other places. Brighton was identified by public sector contributors as a city where every bus is a showpiece for the service and the brand. This brand reflects that buses are easy to use, price accessible, and associated with success: “something to aspire to”. The product needs to be an aspiration, “not something that reflects failure”.

1.87 There are some contributors in the public sector who wish to see a branding “based on what a bus does” (e.g. express, high frequency, ‘Metro10’) rather than a geographic brand, or ownership brand.

1.88 One problem identified in establishing a strong brand for the bus is the understanding of customers and the market. There is no confidence from contributors on the Bus Strategy Board that there is knowledge on how this can addressed in terms of attracting new customers to replace those leaving the market: “How is lifestyle change captured and addressed in marketing?”

An affordable and value for money offer

1.89 Related to customer experience and brand is affordability and value for money. This is a complex issue, as it means different things for different people dependent upon circumstance, and value for money is also dependent upon the quality of service provision and experience, and the price paid. Unsurprisingly, there were a variety of views from contributors.

1.90 In simplistic terms it was recognised by one public sector contributor that “fares have come down in some places”, but that this may be less concerned with providing value to customers, and that “the reality is that some operators have been protecting markets (from other entrants), or squeezing smaller operators, through low fares for customers”. Nevertheless, fares have become more affordable as a consequence.

1.91 It was recognised by one WYCA officer that “regular users can get good value” from the operator-only weekly travel tickets that are available in some areas. Conversely, it was acknowledged that “buses are expensive for the casual user”.

1.92 The ability of customers to understand fares is an aspect that affects considerations on value. There are a number of reflections from WYCA officers on this matter, including that “fares need to be publicised as well as routes”; “if not a regular user, it is too difficult to find out how much the right ticket for the bus is going to cost”; and “it is too difficult to understand what the best value ticket for an unfamiliar journey is”.

1.93 Some specific examples of how tackling the affordability of ticketing can help economic outcomes were given by WYCA. For example, “WYCA has been successful, through the West Yorkshire Travel Plan Network, at getting people into work; with tickets for job interviews, with first monthly MetroCard, etc. These test drive programmes do turn into long term use for 60% of new users”.

ANNEX: DISCUSSION GUIDE FOR MEETINGS

1 Current bus network:

In what ways are buses successful in West Yorkshire currently?

Are there places where patronage growth is occurring?

If so, what is making that happen?

Which segments of the market do buses best serve? Are there segments that are poorly served?

Which aspects of the network work well? In terms of:

- Services
- Infrastructure
- Fares & Ticketing
- Information

What is the most positive thing about the West Yorkshire bus network?

What is the worst thing about the current West Yorkshire bus network?

What is the most promising development for buses in West Yorkshire in the coming 2 years; and 5 years?

2 Future bus provision in West Yorkshire

What do current bus users most want from bus services in West Yorkshire?

What do potential users most want from bus services in West Yorkshire?

Do potential future users need something different to existing customers?

What are your expectations or ambitions for buses in West Yorkshire?

Can buses deliver all that people expect from them?

What barriers exist?

What role should the bus play in the Northern Powerhouse?

3 Best practice

Across the world or nationally across the UK, what constitutes best practice in respect of bus service provision? In terms of:

- Services
- Infrastructure
- Fares & Ticketing
- Information

Are there any examples of this happening in West Yorkshire?

4 Single Transport Plan principles

What will be the main contribution of the bus to the Single Transport Plan?

What needs to happen in order for buses to contribute towards the STP core principles? In terms of:

- Developing metro-style PT networks
- Making cities, towns, neighbourhoods more attractive places
- Contributing to smart futures
- Effective use of resources

- Effective use of assets (stops, bus stations, info infrastructure)

5 Any other issues for discussion