

West Yorkshire Bus Strategy

Full Technical Report

West Yorkshire Bus Strategy

Draft for adoption: July 2017

Contents

EXECUTIVE SUMMARY	5
1 INTRODUCTION	8
2 STRATEGIC CONTEXT & CHALLENGES	10
Local Policy Context	10
National Policy Context.....	18
Industry Challenges	22
3 HOW THE BUS CAN HELP DELIVER WEST YORKSHIRE'S PRIORITIES	24
Buses Support the Economy	24
Buses Support Inclusion and Provide Access to Opportunity.....	24
Buses Benefit the Environment, Health and Wellbeing	25
4 CUSTOMER FOCUSED PROBLEMS AND OPPORTUNITIES	26
5 THE VISION & OPPORTUNITY	30
Vision	30
Objectives	30
Critical Success Factors	30
The TARGET FOR GROWTH	31
6 THE WEST YORKSHIRE BUS POLICIES	32
1. Your Customer Experience.....	33
2. Your Bus Journey	35
3. Paying for Travel.....	38
4. Planning Your Journey.....	39
5. The Environment.....	40
6. Accessibility	42
7 SUPPORTING THE DELIVERY OF THE STRATEGIC ECONOMIC PLAN	44
8 CONCLUSIONS	47
9 DELIVERY OF THE BUS STRATEGY	49
GLOSSARY	50
REFERENCES	52

TABLES AND FIGURES

Figure 2.1 Leeds City Region Strategic Economic Plan	10
Figure 2.2 Strategic Priorities.....	11
Figure 2.3 SEP Headline Initiatives	12
Figure 2.4 NOx emissions of buses by Euro Standard and fuel type	15
Figure 2.5 PM emissions of buses by Euro Standard and fuel type	16
Figure 2.6 Green House Gas (Well to Wheel) emissions of buses by Euro Standard and fuel type	16
Figure 2.7 CC Findings on market share of dominant operators (West Yorkshire) (2011).....	18
Table 4.1 Customer Focused Problems, issues and opportunities.....	28

APPENDICES

Appendix A	Summary of Phase 0 consultation
Appendix B	Achievements, Roles and Responsibilities
Appendix C	West Yorkshire Trends Evidence
Appendix D	Customer Problems and Opportunities Evidence
Appendix E	Evidence of investments delivering bus patronage growth
Appendix F	Addressable and future demand study
Appendix G	Phase 1 Consultation Document
Appendix H	Phase 1 Consultation Findings Report
Appendix I	Response to Phase 1 Consultation: 'You Said, We Did'
Appendix J	Bus2018 Short Term Initiatives
Appendix K	Phase 2a Consultation Report
Appendix L	February 2017 WYCA Transport Committee Bus Strategy Report
Appendix M	Phase 2b Consultation Report
Appendix N	WY Stated Preference Research Final Report, March 2017
Appendix O	Illustrative Application of Values in Economic Appraisal, March 2017

Executive Summary

Bus is a fundamental and significant component in the delivery of a modern, integrated inclusive transport network for West Yorkshire. Each week people in West Yorkshire make almost 3 million journeys on local bus services, making them the most highly used form of public transport. Buses take people to work; to school, college and university; to hospital; to shops; and to a range of social and leisure activities across West Yorkshire. In addition to the economic benefits, the bus is an effective tool of social policy for delivering inclusive growth. Vulnerable and socially disadvantaged groups in society are often the most reliant on bus networks. Bus services are fundamental to providing the jobless with access to work; young people to education and training; and providing a way out of social isolation for older and disabled people.

Our goal is to create the best bus system in Europe, where catching the bus in West Yorkshire is an attractive and natural choice for everyone. Delivering this step change is fundamental to helping to realise the ambitious economic growth targets for West Yorkshire and the City Region. To realise this, the vision for the West Yorkshire Bus Strategy is:

To create a modern, integrated and innovative bus system which puts customer first and contributes to the delivery of the economic, environmental and quality of life ambitions as set out in the Strategic Economic Plan and the West Yorkshire Transport Strategy

From this vision, the following objectives have been defined:

- To enable economic growth in West Yorkshire by improving connectivity to areas of economic opportunity;
- To realise environmental aspirations, including significantly reducing local emissions; and
- To support local communities by providing access to health services, education and employment, leisure and retail destinations.

To deliver the vision and resolve the challenges which currently exist in the industry, the West Yorkshire Bus Strategy contains a blend of seven coordinated policies:

- To provide consistent and excellent customer services across the bus system.
- To provide modern, coherent and integrated bus services
- To provide integrated, simple and affordable bus fares for all
- To provide easily accessible and reliable travel information
- To present the bus system as a single network
- To provide a modern bus system which contributes to improved air quality
- To provide an inclusive and accessible bus system

In delivering these policies, the West Yorkshire Bus Strategy must put the needs of the customer first. In addition the role of the bus driver is critical and the West Yorkshire Bus Strategy must, create a safe and secure environment for all, be affordable and support the long-term financial sustainability of the West Yorkshire bus system.

The Strategy sets the ambition as targeting 25% patronage growth from 2016 levels, over the next 10 years, but given the level of housing and employment growth forecast, it is not infeasible to target even higher levels of bus patronage. In addition, bespoke analytical economic research undertaken to value the Bus Strategy is provided in Appendix O and has demonstrated that delivery of these policies could lead to an economic benefit to the Region's economy of £455million PV over a 20-year period (GDP

Deflator real 2010 prices). This equates to a potential revenue uplift of around £138million PV over a 20-year period (GDP Deflator real 2010 prices).

Development of the West Yorkshire Bus Strategy

WYCA is committed to working closely with District Authorities, bus operators, stakeholders and the public to help shape and deliver improvements to the bus system. The development of the West Yorkshire Bus Strategy has been informed by local and national policies and also through support from District Authorities, Bus Operators, local businesses and other key stakeholders. This adopted version of the West Yorkshire Bus Strategy follows a series of consultation phases:

- Phase 0 consultation took place in September 2015. The conclusions of this initial scoping stage of the Bus Strategy are included in Appendix A
- Phase 1 consultation took place in October/November 2015 on the draft vision and principles. This consultation was predominantly with District Authorities, Bus Operators, the Business Community and a number of members of the public also commented. The conclusions of the phase 1 consultation are included in Appendix H. A note outlining how the comments received to date have been incorporated in the Bus Strategy is provided in Appendix I.
- Phase 2a was a full public and stakeholder consultation took place from 18 July 2016 and ran until 21 October 2016. The consultation on the Bus Strategy took place together with the wider West Yorkshire Transport Strategy. A full report around the conclusions of the consultation are provided in Appendix K and was reported to WYCA Transport Committee in February 2017.
- Phase 2b: Reflecting on feedback received in Phase 2a and the recommendations from Transport Committee, Phase 2b was a supplementary consultation focusing on Accessibility. A full report around the consultation and its conclusions are included in Appendix M.

After each consultation phase, the results were analysed and full consideration was given to the views expressed. Each phase of consultation has informed the development of this adopted version of the West Yorkshire Bus Strategy.

Delivery of the West Yorkshire Bus Strategy

The West Yorkshire Bus Strategy has a 20 year planning horizon and in the medium term, in the context of finalisation of the guidance and secondary legislation of the new Bus Services Act, WYCA, with its partners will assess how to deliver the Bus Strategy (including potential delivery routes such as Partnership and Franchising).

In the short term, to complement the development of the West Yorkshire Bus Strategy, WYCA is working in partnership with bus operators through 'Bus2018'. Bus2018 is a programme of initiatives to improve services for bus passengers in West Yorkshire jointly delivered jointly by bus operators (as represented by the 'Association of Bus Operators in West Yorkshire' called 'ABOWY') and West Yorkshire Combined Authority. The objectives for Bus2018 are that schemes must;

- Be deliverable before the end of 2018;
- Provide tangible benefits to the customer;
- Be deliverable within the current legislative framework;
- Minimise any additional governance requirements; and
- Not constrain any party in terms of the longer term strategy

Buses 2018 includes a range of short term measures in a number of areas, around network stability, communications with young people, air quality, ticketing, punctuality, customer service, information and communications are being developed by WYCA with the ABOWY.

In the medium/longer term, decisions regarding *how* the West Yorkshire Bus Strategy is delivered will be developed in the context of the new legislative powers available to this region through the Bus Services Act and in taking into account the performance of the current partnership. The main consideration will be determining whether the partnership is delivering the objectives and vision of the West Yorkshire Bus Strategy.

1 Introduction

Context

- 1.1 More people in West Yorkshire travel by bus than any other form of public transport, accounting for 21% of all journeys in the morning peak and almost two thirds of all public transport journeys¹. Every day across West Yorkshire, significantly more people travel by bus, than by rail or any the public transport mode.
- 1.2 There is an extensive body of evidence² on how buses can support inclusive growth through contributing to economic development and regeneration, supporting town and city centre economies, and helping to achieve environmental and quality of life goals. Bus is a crucial component of the West Yorkshire transport system and economy. Buses:
- Allow people travel to and from work. For many commuters, if a bus were not available they would have to either change job or would not be able to work at all;
 - Bring wider productivity benefits to urban economies bring business closer together, lowering costs and increasing productivity. It is estimated that bus networks in Metropolitan areas generate in excess of £400m per year from these types of benefits³;
 - Enable more people to participate in the labour market, retain employment and stay in work longer;
 - Provide access to a wider range of jobs and increasing the chances of employers and employees achieving the right skills match;
 - Allow travel to and from school, college or university, which is allowing students to gain the knowledge and skills that will underpin the future West Yorkshire economy.
 - Facilitate travel to and from shops and various leisure attractions. Collectively, it is estimated that bus users spend £27.2bn⁴ annually on retail and leisure. Buses allow consumers to access shops and services more easily and enable them to source a wider range of products or take advantage of better prices. By supporting access to key retail locations, buses provide a platform for further retail development which can help local economies grow and prosper.
- 1.3 Importantly, as long as they are affordable, buses are available to all. They allow those without a car, either through choice or because they cannot afford one, to access jobs and services. Without buses, it would be impossible for West Yorkshire's towns and cities to function, or grow.
- 1.4 There have been many positive initiatives over the past decade by the bus industry which have led to pockets of growth as a result of investment. However, overall patronage remains around 18% lower than it was twenty years ago. The economic crisis from 2008 onwards led to a further reduction in patronage leading to the lowest ever level in 2010/11 of below 180 million journeys. In spite of the slight uplift in the last four years (which will be due to a range of factors including the improving economic outlook), bus trips per head of population have continued to decline. This picture of bus patronage decline has occurred against a backdrop of:
- A reduction in vehicle km operated on local bus services in West Yorkshire;
 - An increase in bus fares at rates higher than the Consumer Price Index and the cost of operation.
 - Rising car ownership and an increasing population;
 - A highway network which is often already at capacity;
 - A rail network which has seen substantial patronage growth and is forecasting further growth;
 - An increase use in 'active' and other modes.
- 1.5 The trend in West Yorkshire is in line with national trends as passenger demand for bus services in England outside of London. Brighton, Oxford and York are examples of where bus patronage has

increased. The long term decline in bus usage is not inevitable. With the right conditions a spiral of decline can be turned into a virtuous circle where patronage growth generates both the revenue to fund investment to deliver further improvements and the need for additional services to more provide capacity, in turn attracting more passengers to bus.

- 1.6 A West Yorkshire bus industry in long term decline will not meet with the local policy objectives, the aspirations or expectations of WYCA and its stakeholders. In common with Local Transport Authorities, operators and passengers across the country all partners involved in the bus industry want long term market growth.

The Need for the Bus Strategy

- 1.7 Although there are pockets of growth and investment, overall, the evidence shows that the West Yorkshire bus system is currently in long term decline. This situation does not accord with the local policy objectives, or policy aspirations. Continuation of the status quo will maintain this unsatisfactory situation.
- 1.8 The development of an evidence-based strategy is in line with good practice to inform decision making and provide a long term vision for bus within the context of the broader policy context. The purpose of the West Yorkshire Bus Strategy is to create an opportunity for change and demonstrate how bus can support the delivery of the SEP, as continuation with the status quo will deliver more of the same. By helping West Yorkshire realising the potential of buses, the economic growth potential of the region will be able to be realised.

The specification of the Bus Strategy

- 1.9 The West Yorkshire Bus Strategy is an integral component of the broader West Yorkshire Transport Strategy, which in turn forms the basis for the transport aspect of the Leeds City Region Strategic Economic Plan. Through these plans, WYCA aims to raise the quality of life in West Yorkshire by encouraging the right conditions for economic growth that enable job creation, provide opportunities for skills development, and deliver new affordable homes; all supported by a modern, integrated transport network. The West Yorkshire Bus Strategy:
- Illustrates the policy context;
 - Summarises the key problems which customers face on a day-to-day basis with the Bus system;
 - Identifies a range of strategic challenges facing the bus industry;
 - Sets out the vision and set of objectives for over the next 20 years;
 - Outlines a combination of policies to deliver the vision and objectives.
- 1.10 The West Yorkshire Bus Strategy will be subject to periodic review as market conditions change and as new opportunities arise.

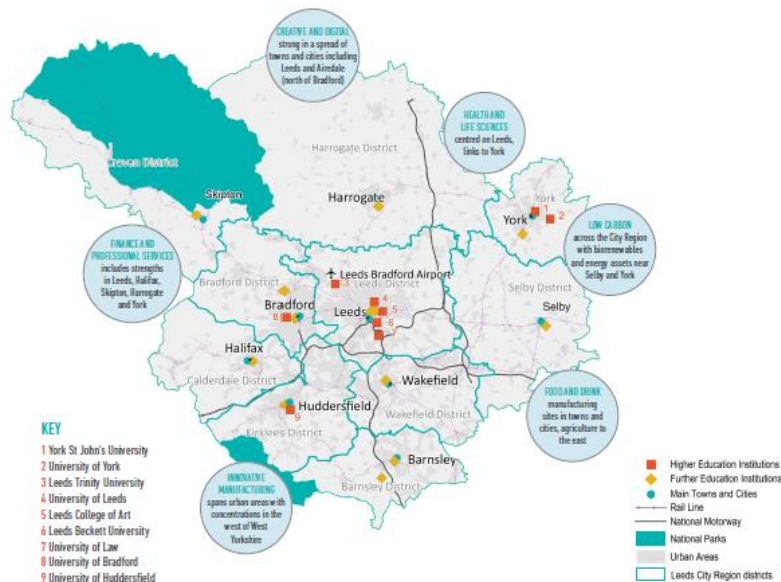
2 Strategic Context & Challenges

LOCAL POLICY CONTEXT

Leeds City Region Strategic Economic Plan

- 2.1 The Strategic Economic Plan is the top level strategy document for WYCA and will guide all the work that WYCA and its partners do. The Strategic Economic Plan (SEP)⁵ is the long-term plan, which sets out the economic ambitions for the Leeds City Region and how partners will work to achieve them.
- 2.2 The SEP is produced by the WYCA/Leeds City Region Local Enterprise Partnership (LEP) and other partners in the City Region. The first SEP (2014), secured one of the country's largest 'Growth Deal' settlements resulting in over £800m in government investment, which alongside local commitments has been used to establish the £1.4 billion Transport Fund for West Yorkshire and York. The SEP has now been adopted by the LEP Board, and endorsed by the Combined Authority. The SEP covers the same 20 year period from 2016 to 2036 as the Transport Strategy and Bus Strategy.
- 2.3 The SEP is an ambitious plan that builds on progress to date and sets the course for the businesses, people and places of the City Region to fulfil their exceptional potential. It recognises that transformational change cannot be delivered by WYCA and the LEP alone and therefore acts as the framework for engagement with others in the City Region and beyond – working across the private, public and third sectors – to coalesce action around a shared intent for good growth.

Figure 2.1 Leeds City Region Strategic Economic Plan



Source: LCR SEP

- 2.4 The SEP introduces the concept of good growth with a focus on sustainability, inclusion and quality of life. The SEP vision is:

“To be a globally recognised economy where good growth delivers high levels of prosperity, jobs and quality of life for everyone”

- 2.5 In achieving this vision, the City Region will unlock its full economic potential and cement its place as an engine for growth in the North and for the nation as a whole. It will become a positive, above average contributor to the UK economy and deliver upwards of 35,000 additional jobs and £3.7 billion of annual economic output by 2036.
- 2.6 The SEP sets out a strategy to go still further than this in the long term. As part of the Northern Powerhouse, and with growth magnified by devolution, we would look to achieve even faster rates of growth and job creation, moving to upwards of 50,000 additional new jobs by 2040. In striving to deliver these ambitions and our good growth principles, we will seek the best balance between quantity and quality of growth to ensure benefits for businesses, people and the environment and reduced inequalities. This will mean the City Region will be well on its way to the aspiration of becoming a 'net contributor' to the UK economy in terms of the tax revenues it raises.
- 2.7 To achieve the vision, the SEP will continue to be based on the four inter-connected strategic investment priorities set out in the first SEP, as shown in Figure 2.2.

TO ACHIEVE THE VISION THE SEP WILL CONTINUE TO BE BASED ON THE FOUR INTER-CONNECTED STRATEGIC INVESTMENT PRIORITIES SET OUT IN THE FIRST SEP PUBLISHED IN 2014 AS BELOW:



Figure 2.2 Strategic Priorities

Source: LCR SEP

- 2.8 The headline initiatives in Figure 2.3 represent the vital developments that the SEP wishes to see delivered – or well on the way to delivery - over the next ten years. In effect, they are the large scale 'game changers' that will make pivotal inroads into achieving the City Region's vision. They span all four priorities of the SEP strategy and will support its good growth principles. They have been identified because they:
- address key issues and opportunities for the City Region economy and its businesses, people and places
 - are genuinely major and partnership-based initiatives with big impacts
 - are focused on clear action
 - combine a foundation in current work and/or assets with an ambition to go further
- 2.9 The set of Headline Initiatives are set out in Figure 2.3, and briefly sets out the nature of each initiative, why it is important and the mechanism for its delivery.

Figure 2.3 SEP Headline Initiatives



Source: LCR SEP

2.10 Investment in transport infrastructure is identified as a key action area and the SEP sets out its expectations for the transformation of transport in West Yorkshire:

- An **integrated, accessible transport system** which meets the needs of people and business and connects new and existing centres of work and of population; including transport infrastructure and services to support the growth and regeneration of Spatial Priority Areas;
- An **efficient, well maintained and resilient highways network**, optimised by real time traffic management and information systems, providing new or improved access to unlock development, and where possible designed to move traffic away from town and city centres;
- A **fully integrated 'metro style' City Region public transport network**, further enhancing rail travel and spreading the benefits to communities of rail schemes such as HS2 and improved Trans-Pennine rail links, and integrating a bus network that delivers what customers want and which supports growth, inclusion and accessibility;
- Full exploitation of **new and 'smart' technologies** to provide travel information, smart ticketing and payment systems and better traffic management;
- **Environmental improvements** through the reduction of carbon emissions and air pollution from transport; the achievement of clean air standards and the creation of liveable centres and neighbourhoods; steps to reduce demand for travel, influence modal choices and support electrified transport options;
- **Cycling** established as a major mode of transport, with increased active travel benefiting health;
- Ensuring that transport systems **serve all communities**, including disadvantaged and rural ones.

Local Development Plans

- 2.11 The five West Yorkshire Districts, through their respective Local Plans, are developing specific proposals to accommodate growth in line, and in most cases beyond into the next decade to 2030. These plans articulate the vision for substantial growth focusing on a number of town and city centres and including significant new urban extensions across West Yorkshire.
- 2.12 Alongside this growth, national forecasts project that the number of people living in each house will drop⁶, and the greater dispersal of people will lead to more travel. The Local Plans emphasise the need for sufficient transport capacity to accommodate the travel that this economic growth will produce. With urban extensions and new employment sites identified, or being identified, in all five Districts, it is important that if the overall economic vision of the SEP is to be met the bus network must change to serve these new land-use allocations across West Yorkshire and beyond.

West Yorkshire Transport Strategy

- 2.13 There is a statutory requirement for the Local Transport Authority (WYCA) to develop and maintain a Local Transport Plan. The West Yorkshire Transport Strategy will fulfil the role of WYCA's Local Transport Plan. The West Yorkshire Transport Strategy is proposed as a concise, high level document and sets out:
- The strategic and policy context – provided by the SEP and the national (HS2) and pan-northern (Transport for the North, Rail North) proposals for investment in transport – which provide a framework for our regional and local proposals;
 - The current role and performance of the West Yorkshire transport system in meeting the requirements of our economic, environmental and social goals;
 - The key gaps are in our current networks and plans;
 - Transport objectives;
 - The policies that are intended to deliver transformational change in our transport system;
 - The Transport Strategy concludes with consideration of funding for the strategy, the implementation plan process and measuring the delivery of the strategy.
- 2.14 The West Yorkshire Transport Strategy has been developed in the context of the SEP and has also been informed by complementary work to develop the HS2 and the Northern Powerhouse Rail propositions for investment in transport across the North. The West Yorkshire Bus Strategy is an integral element of the Transport Strategy. The Transport Strategy objectives are:
- **Economic Growth:** To improve levels of connectivity and reduce congestion, thereby increasing business productivity and providing access to wider labour markets;
 - **Quality of Life:** To create a 'sense of place', encouraging active travel and health benefits and increasing access to opportunities in a safe way.
 - **Sustainability:** To have a positive impact on our built and natural environment, improving development viability and increasing longer term resilience;
- 2.15 The approach to realising the Transport Strategy's objectives will be through the core themes and a set of related policy proposals under each theme. The core themes provide structure to the policy proposals and are related to the aspects which the public and stakeholders identified as most important in earlier consultation. These were tested through the public consultation in 2016 and are anticipated to be updated. In total, five core themes were proposed:
- **Highway Network** – our ambition is for a road network that works better, enabling all users to move around more efficiently and effectively, and balancing the competing demands for road space;

- **Places to live and work** - our ambition is to make our cities, towns and neighbourhoods more attractive places to live, work and visit;
- **One System** - our ambition is for a transformational metro style public transport system that connects different modes of transport i.e. bus, train, cycling into one network. The network will be easy to use and easy to understand; it will be joined up and will offer quick, convenient journeys from door to door;
- **Smart Futures** - our ambition is to use technology to better plan and manage the transport system and improve the experience of the people using it;
- **Asset Management** - our ambition is to ensure that our transport assets are fit for the future and properly managed in a sustainable, environmentally friendly, and cost-effective way.

2.16 The Transport Strategy also includes a number of cross cutting themes, covering Environment, Health and Well Being, and Inclusion.

2.17 The focus of the SEP and the Transport Strategy is on facilitating good growth, by not only achieving a radical uplift in growth, productivity and business success, but ensuring that all communities and people have the opportunity to participate in and benefit from the growth, improving quality of life for everyone.

2.18 The Transport Strategy sets out ambitious plans for transport, but affordability is a key issue and constraint. The way in which transport is funded is changing with revenue/maintenance budgets reducing, whilst capital budgets for major projects have increased. The Transport Strategy considers new capital and revenue funding opportunities including considering fiscal demand management, when the conditions are right.

Provision of Socially Necessary Bus Services

2.19 WYCA has, under the Transport Act 1968, a duty to consider the need for socially necessary bus services and a power to procure such services. Approximately 15% of all bus service mileage operating in West Yorkshire is procured by the Authority through contracts with bus operators. WYCA has adopted Guidelines⁷ to assist in the discharge of its legal responsibilities under Section 9A of the Transport Act 1968.

2.20 In accordance with the guidelines, WYCA will provide a transport service to link communities to the nearest transport hub at which they can transfer onto frequent and regular public transport services for onward travel:

- In determining the type and nature of the transport service, WYCA will have regard to the size and nature of the community and the predominant journey purpose.
- In determining access to a service, WYCA will consider a transport service accessible if it is available within a safe walking distance of 600m (up to 10 minutes) of a majority of households in a community. In assessing this, WYCA will have regard to the prevalent local geography and demographics.
- In determining the location of the transport hub, WYCA will have regard to the availability of local shops and facilities.

2.21 WYCA has adopted criteria and metrics to ensure the bus services it funds are effectively meeting transport needs and demonstrating value for money.

West Yorkshire Low Emission Strategy (WYLES)

2.22 WYLES is also an integral component of the West Yorkshire Transport Strategy. WYLES⁸ seeks to address local air quality, but also global concerns about carbon. It has four main themes:

- Evidence for Change – sets out the evidence driving the need for change

- Creating a Low Emission Future – what needs to be done shape the places where people live and work; how they travel; and the choices they make so that low emission travel becomes part of normal everyday life;
- Reducing Vehicle Emissions – What can be done to cost-effectively reduce road transport related emissions of Oxides of Nitrogen (NOx) and Particulate Matter (PMn) to improve air quality and health whilst seeking win wins by also reducing greenhouse gas emissions where possible;
- Controlling Emissions from non-transport sources – considers other contributing factors to reducing emissions outside of transport.

2.23 WYLES recognises the vital role that public transport plays in our everyday lives and buses and trains provide efficient transport modes and an alternative to private vehicle use and potential for reducing congestion. It also outlines that older buses and trains can cause the most significant emissions.

2.24 Whilst private cars account for 78% of the 9.8 billion miles driven on West Yorkshire roads and are therefore a significant contributor to overall emissions, buses also contribute to the air pollution problem particularly in town and city centres, as the vast majority of buses in West Yorkshire are purely diesel powered. WYLES sets out that across West Yorkshire, diesel buses still form the backbone of the public transport network and that bus emissions in Bradford were found to be responsible for around 40% of NOx emissions in the Inner Ring Road area.

2.25 Figure 2.4 and Figure 2.5 show the relative emissions of buses by Euro Standard travelling at urban speeds. It can be seen that Euro V buses tend to emit more NOx than Euro IV buses due to the ineffective operation of their NOx catalysts not working properly at low speeds when the exhaust temperature is insufficient.

2.26 Figure 2.6 illustrates the greenhouse gas emissions of buses by Euro Standard and fuel type, demonstrating the challenge we face in reducing such emissions from diesel powered buses.

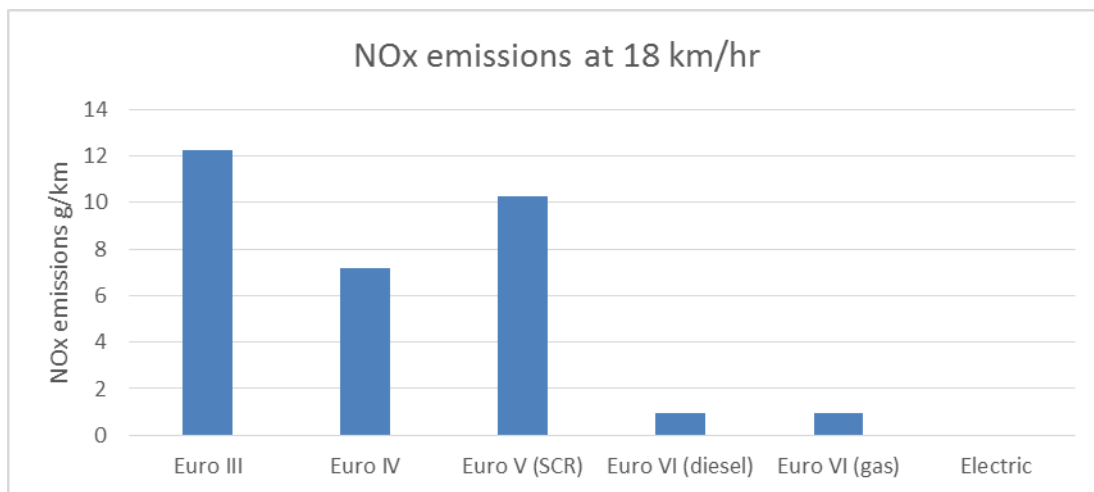


Figure 2.4 NOx emissions of buses by Euro Standard and fuel type

Source: WYLES

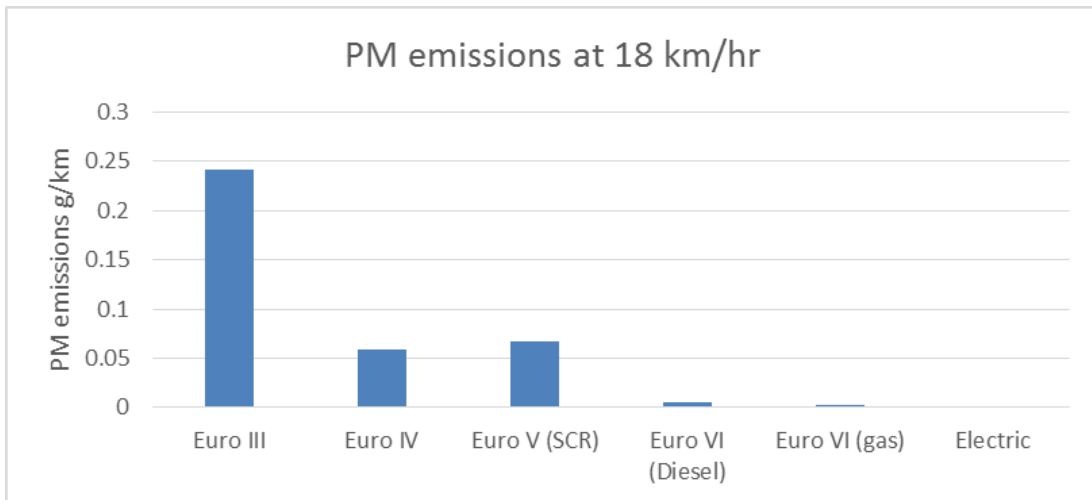
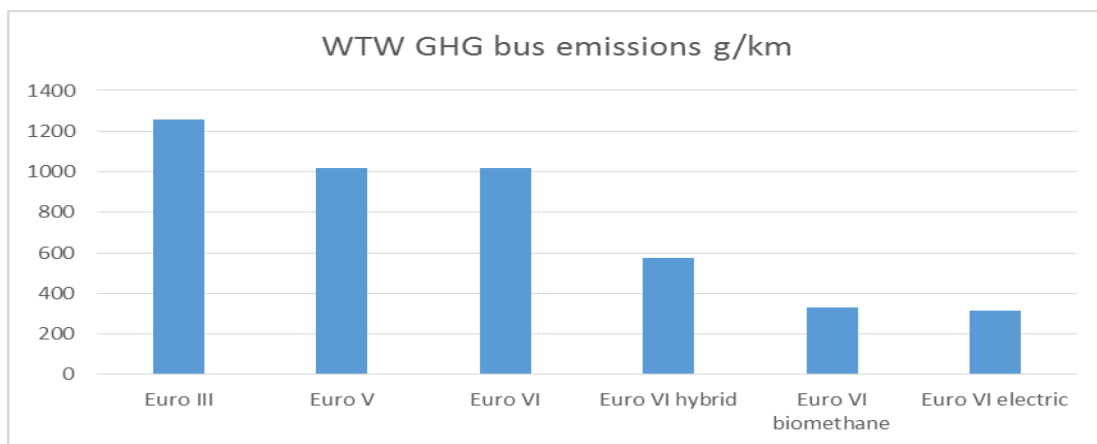


Figure 2.5 PM emissions of buses by Euro Standard and fuel type

Source: WYLES

Figure 2.6 Green House Gas (Well to Wheel) emissions of buses by Euro Standard and fuel type



Source: WYLES

- 2.27 To address the issue of air pollution, buses will need to play a key role by offering a viable alternative to car use and reducing the number of car journeys made, whilst the older, more polluting vehicles need to be replaced by modern, low emission, or preferably emission-free, buses.
- 2.28 In total since 2009, West Yorkshire has benefited from nearly £8.5million of central government funding to support the introduction of 266 new or retro-fitted low emissions buses. Most recently, investment in West Yorkshire includes the purchase in 2015 of 34 new hybrid diesel-electric double-decker buses through the support of central government funding. While welcomed, this still represents a relatively small proportion of the overall vehicle fleet size in West Yorkshire. Significant further vehicle investment is planned, especially in Leeds through the Leeds Public Transport Investment Programme, which will see many more vehicles which meet and surpass the EURO VI emissions standards.
- 2.29 Most electric and alternatively-fuelled buses are currently still significantly more expensive than diesel buses to buy, however, this may be outweighed by lower operational costs. For bus operators, the main question when starting to use alternatively-fuelled and electric buses is how to introduce them without interruptions of service or increasing costs. To date, although bus operators have invested in EUROVI

buses, investment in all alternative fuel technologies has been low, due to the challenges with making an affordable business case.

- 2.30 WYLES concludes that although buses are currently a part of the air quality problem, the progressive introduction of lower emission diesel buses, hybrid, gas and electric vehicles, (together with the retrofitting of buses already in service which currently have higher emissions), will allow the bus to support low-emission policies locally.

Other Relevant Transport Developments

- 2.31 There are a number of other significant strategic opportunities that will help improve the attractiveness and performance of transport within West Yorkshire, and across the wider City Region:
- High Speed Two (HS2) will present economic opportunities to West Yorkshire through a station in Leeds city centre. It is important that the benefits of this investment are shared with as many people across the City Region, as identified in the WYTS core principle of 'One System' to develop an integrated, easy to use public transport network;
 - The Northern Powerhouse seeks to rebalance growth in the North of England and includes investment in transport, and devolution of powers through City Deals;
 - Transport for the North (TfN); a partnership of the North's city regions and the government consisting of Combined Authorities, Local Transport Authorities, Local Enterprise Partnerships, Highways England, Network Rail and HS2 Ltd is developing and promoting transport investments through a £15 billion, 15-year transport investment plan, which complements the HS2 proposals and associated Rail North rail service and route development plans. The TfN Spring 2016 Business Plan⁹ sets out that local initiatives focused around bus are best led by the Local Transport Authority. TfN sets out its aim to deliver simplified fares, integrated ticketing, and improved online passenger information across all public transport modes across the North. TfN is working with partners in the Combined and Local Transport Authorities and operators to develop a strategic outline business case and implementation plan for smart and integrated ticketing across the North.

NATIONAL POLICY CONTEXT

Competition Commission

- 2.32 In 2011, the Competition Commission undertook an investigation into local bus services, following referral by the Office of Fair Trading in 2010¹⁰. The Competition Commission Market Investigation considered the effectiveness of competition in the bus market and the potential for consumer detriment from its structure and operation¹¹. The Competition Commission identified that the West Yorkshire bus market was highly concentrated, with little on-street competition, with most areas served by a single operator. The Competition Commission concluded that over 50% of routes in Leeds were likely to experience ‘adverse effect of competition’ (that is a detriment arising from a lack of competition)¹².
- 2.33 Figure 2.7 illustrates the bus operator market shares by district, it illustrates for example that the combined market shares of the two largest operators in Leeds is over 90%. The Competition Commission reported that “*FirstGroup noted ‘there has been no change to the share of bus service provision in the Leeds area for some time’ and that ‘the competition situation is unchanged with Arriva reducing frequency rather than looking to expand’. This example illustrates that a service reduction by an incumbent operator did not seem to induce nearby rivals to consider a response. This might indicate a reluctance to compete*”¹³. More recent analysis undertaken for Metro indicates that the level of market concentration for large operators has not materially changed since 2011, although it is noted that there has been further contraction in the numbers of small operators in West Yorkshire.

Figure 2.7 CC Findings on market share of dominant operators (West Yorkshire) (2011)

Area	Largest operator	Market Share %	2 nd largest operator	Market Share %
Leeds	First	65.6	Arriva	26.1
Bradford	First	76.1	Arriva	12.7
Wakefield	Arriva	88.6	Star Travel	2.8
Huddersfield	First	65.6	Centrebus	17.9
Halifax	First	73.6	Halifax JC	11.1

Source: Competition Commission: Route and Urban Area Analysis: Summary of Findings, 2011

- 2.34 The Competition Commission estimated that the total detriment to consumers and taxpayers (in England outside London) as a result of adverse effects on competition was in the range of £115 million to £305 million per year¹⁴. Applying the methodology locally suggests that over £25 million per annum of this adverse impact was attributable to West Yorkshire¹⁵. Analysis undertaken by Metro in 2013 illustrated that little has changed in the local bus market since the publication of the Commission’s report.
- 2.35 The Commission concluded that this detriment could best be remedied through removing barriers to entry and improving competition in the market. They made several recommendations to this effect in relation to ticketing, operator behaviour, access to bus stations, supported services, effective competition enforcement, partnerships, payment of the Bus Service Operators Grant (BSOG) and wider incentives¹⁶. There has been little action in West Yorkshire to reduce the scale of the detriment, for example, as the recommendations regarding ticket pricing have not been adopted by TICCO, the

remedies were already in place or because new primary/secondary legislation was required. It is understood that the CMA is expected to publish further guidance around ticketing in the near future¹⁷.

2.36 As a result, the Competition Commission concluded¹⁸ that the Adverse Effects of Competition on market concentration in West Yorkshire remain, which are likely to be impacting on the financial sustainability and value for money of the bus system, meaning that on average:

- 48.5% of routes in West Yorkshire are highly likely to suffer from Adverse Effects of Competition;
- Over 50% of routes in Leeds, Bradford and Halifax are highly likely to be subject to Adverse Effects of Competition; and
- Only 2.3% of routes in West Yorkshire are categorised as not being subject to Adverse Effects of Competition.

2.37 It is WYCA's view that since the Competition Commission concluded its analysis, there has been no material change in the West Yorkshire bus system. This means that the conclusions reached by the Competition Commission remain valid.

Local Devolution

2.38 The Cities and Local Government Devolution Act 2016 forms part of the Government's policy of devolving the powers and budgets of public bodies to local authorities and combined authorities.

2.39 A devolution deal was announced for Leeds City Region in March 2015 which involves extending responsibility over skills training, employment, housing, business support and transport. Subsequently, the West Yorkshire Leaders submitted a further devolution proposal to Government in September 2015, which included greater powers to raise and direct funding to achieve the objectives of the SEP. One of the main ways in which these objectives can be met will be through greater powers over transport, including buses, which may form part of any future development of the current devolution deal.

2.40 Central Government is currently considering this proposition for the region.

Transport Acts 2000 & Local Transport Act 2008

2.41 The current bus regulatory system has evolved post-deregulation to encourage local authorities to develop partnerships with bus operators and to allow the potential for market interventions in specific circumstances.

2.42 Legislation currently provides for four types of local authority involvement:

- Voluntary agreements with one or more operators where the authority provides capital investment in infrastructure and information provision, with the operator committing to more services, better delivery mechanisms and improved customer service;
- Statutory Quality Partnerships (SQP) where the local authority defines the bus-related infrastructure needs, and the standards which operators must reach to use this infrastructure (such as vehicle and operating standards). The SQP would usually confer a commercial advantage on an operator through reduced journey times, better information provision and / or greater market presence through route branding, all of which should result in patronage growth;
- Quality Contract Scheme (QCS) where the routes or networks are defined by the local authority, with operators securing, by competition, rights to operate the specified services, to the exclusion of other operators.
- Qualifying agreements (QAs) where the local authority certifies an agreement between operators which would otherwise be in breach of competition law, as being in the interests of persons using local services, and only containing indispensable provisions.

- 2.43 However, data availability is key to the development and delivery of the market interventions. For example, under the Transport Act 2000, there is no requirement for Operators to make commercial information available, and therefore Operators have an incentive to withhold the information prior to any hearing. The Traffic Commissioners at the Nexus Quality Contracts Hearing concluded “4.26.*We do not underestimate the complexities and practical difficulties of compiling a proposal of that size involving three very large businesses and others who formed part of NEBOA, yet it is hard to avoid concluding that the operators put forward as little as possible until the very last minute.*” Information about the operation of bus services is currently not available and this information is key to understanding whether bus can realise its potential.

Bus Services Act

- 2.44 The Bus Services Act has its origins in the Government’s devolution agenda, and is intended to provide a better and more effective spectrum of options from which local places can choose the best solution for their circumstances. The Act, which reached Royal Ascent in April 2017 includes powers to:
- Strengthen arrangements for partnership working in the sector, introducing ‘enhanced partnerships’;
 - Introduce new franchising powers with decision making at a local level; and
 - Provide for a step change in the information available to bus passengers .
- 2.45 It is an enabling bill and extends to England and Wales, although it is intended to apply only to areas in England outside of London. The Explanatory Notes state that the “Government would not mandate which approach is to be taken, encouraging LTAs to pursue the most suitable solution for their area”.
- 2.46 The Act provides the legislative models for delivery of this West Yorkshire Bus Strategy.

Operator plans and policies

- 2.47 Existing Bus Operators across West Yorkshire have already been consulted throughout the development of this emerging West Yorkshire Bus Strategy, and are key partners supported the summer 2016 (Phase 2a) public and stakeholder consultation.
- 2.48 The large operators (including First, Arriva and Transdev) in West Yorkshire work together under the umbrella organisation called ‘Association of Bus Operators in West Yorkshire’ or ABOWY. Through this umbrella organisation they aim to provide a unified voice. ABOWY has set out that they want to “*work together to enhance bus travel in West Yorkshire, thus unlocking substantial economic growth across the City Region*”¹⁹ and that they “*very much welcome WYCA’s positive approach in embracing working together for the direct benefit of customers and in developing our local economy*”. ABOWY have proposed a series of measures in the short term which will enable ABOWY and WYCA to quickly begin delivering improvements together which have been agreed through Bus2018.
- 2.49 Bus operators, however, are not a homogenous group and there is no formal process by which they share or develop their key plans and policies which affect West Yorkshire. Their corporate plans and policies with regard to West Yorkshire as a whole are typically fragmented and often not integrated or co-ordinated:
- First West Yorkshire is the largest operator with circa 60% of the market. It is the local subsidiary of FirstGroup plc. The company’s overall strategic view of the market²⁰ is characterised by maximising ‘revenue growth’ and delivering ‘a strong attractive customer proposition’²¹ within strict commercial targets aimed at moving towards ‘double digit’ operating margins in the medium term²². Discussion with First during the initial stakeholder meetings indicated a local focus on investment in vehicles that meet the latest emission standards, introducing new ‘Pulse’ branding on high frequency routes, investment in Wi-Fi and recognition that changing land use patterns associated with the SEP would be likely to require changes to the design of the bus network.

- Arriva (25% of the local market) is owned by Deutsche Bahn. The local operator is Arriva Yorkshire, with Yorkshire Tiger, also an Arriva owned company, operating a number of further routes. In the stakeholder discussions Arriva described a strategy of focused investment in branded routes in West Yorkshire (Sapphire and Max brands) with a focus on reliability and punctuality, improved vehicles, and Wi-Fi. The role of commercial targets in decision-making is less clear.
- Keighley & District is part of the Transdev group of companies. Transdev also owns Yorkshire Coastliner and Harrogate & District, which operate services into Leeds city centre, and together they have 6% of the local market. The company recently reported²³ a difficult trading environment with no passenger growth and increased levels of competition, and highlighted pressure on concessionary fares reimbursement and continued increases to their costs. The company's strategy is to develop the business through investment in general quality improvements, for example with the new vehicles on the service 36. Locally this translates into a focus on bus driver service quality and the introduction of ticketing products that enable them to understand the needs of the customers and adapt their network and service accordingly.

2.50 The tendency for the smaller operators is to focus on the market for tendered services or responding to the localised needs in specific local markets where it is not efficient for the larger operators to provide services. The owner of TLC Travel, a smaller operator based in Bradford is quoted as saying: "We're here to operate tendered services in the main; there's a very limited market for us to run commercially. West Yorkshire is sewn up by the big groups, and their ticketing makes it almost impossible for us to compete."²⁴

INDUSTRY CHALLENGES

- 2.51 There is substantial local policy support for encouraging economic growth and for measures that ensure that economic opportunities and the social and quality of life benefits that economic participation brings, are available to everyone. These economic strategies and plans are complemented by transport policy and investment programmes that seek to support the delivery of growth priorities. The strategic context is for WYCA to:
- Deliver the Strategic Economic Plan ambitions;
 - Develop and deliver the West Yorkshire Transport Strategy;
 - Work with District Councils to deliver their strategic priorities including their Local Plans;
 - Enable the delivery of the West Yorkshire Low Emission Strategy;
 - Work with key stakeholders to support the delivery of national/subnational plans including HS2, the Northern Powerhouse, and Transport for the North; and
 - As the Local Transport Authority, ensure that the transport system delivers value for money.
- 2.52 The bus can play a significant role in policy delivery and chapter 3 sets out how buses can deliver these policy objectives. Central to the West Yorkshire Bus Strategy is creating an environment which helps to enable WYCA to realise these broader strategic policies. Together, chapter 2 and Appendix B highlight a number of challenges which the West Yorkshire Bus Strategy will need to address, which can be summarised as:
- i. The long term decline in bus use, with existing users characterised as being drawn predominantly from those on concessionary passes as well as less affluent sections of society.
 - ii. The Competition Commission's key findings that the total detriment to consumers and taxpayers as a result of adverse effects on competition was over £25 million per annum across West Yorkshire. This continues to impact on the value for money of the bus system;
 - iii. The fragmented approach to bus policy delivery, with operators taking individual approaches to delivering their own commercial agendas, rather than focusing on unified strategic objectives set out in the Local Transport Authority's Transport Plan. The operator's focus is, understandably, on its commercial agenda in a challenging market;
 - iv. The lack of clear accountability to, and responsibility for, the customer across the bus industry;
 - v. The changing national policy context as a result of the development of the emerging Buses Bill which is likely to supersede existing legislation around partnership and quality contracts;
 - vi. Increased constraints on affordability of the bus system for both the private and public sectors. For the public sector there are particular constraints on revenue/maintenance budgets which potentially impact on socially necessary services, whilst there are new sources of funding for major capital projects;
 - vii. The limited scope or incentive for the bus industry to invest in materially growing the bus system.
 - viii. The emergence of a ticketing strategy for the North of England through Transport for the North;
 - ix. The increased focus on air quality, particularly in urban areas; and
 - x. The lack of shared data to develop and deliver investments to improve the bus system.
- 2.53 The challenge for the West Yorkshire Bus Strategy is to help create the conditions where a shared view of the bus network, which encompasses economic growth and an ambition to see cleaner, healthier cities, and that supports all of West Yorkshire's communities including those in rural areas, can thrive in meeting these strategic objectives. The West Yorkshire Bus Strategy needs to provide the conditions to enable the bus network to operate as a properly integrated whole. This West Yorkshire Bus Strategy provides the opportunity to maximise the contribution of operators to undertake commercially-driven

development whilst, at the same time, identifying the actions that should be undertaken by the public sector to secure investment from the industry that will achieve the full range of policy objectives.

3 How the bus can help deliver West Yorkshire's priorities

3.1 Buses in West Yorkshire facilitate travel for a variety of purposes across a wide range of communities, and provide important links to national and wider regional networks. Research undertaken by Greener Journeys²⁵ together with other research by the Urban Transport Group (formerly known as pteg)²⁶ and by the University of Leeds²⁷, has articulated the role that buses play in contributing to economic development and regeneration and supporting town and city centre economies and has attempted to quantify these economic benefits.

3.2 This research has also shown that the bus network can be particularly effective at providing access to opportunities for employment and education and a protection against social isolation for some of the most disadvantaged people in society. Those on low incomes, older and disabled people, as well as young people in education and job-seekers have much lower access to cars and are much more dependent on bus services for local accessibility.

BUSES SUPPORT THE ECONOMY

3.3 Every day, more people travel by bus than any other form of public transport. Buses:

- Allow people travel to and from work. For many commuters, if a bus were not available they would have to either change job or would not be able to work at all;
- Bring wider productivity benefits to urban economies bring business closer together, lowering costs and increasing productivity. It is estimated that bus networks in Metropolitan areas generate in excess of £400m per year from these types of benefits²⁸;
- Enable more people to participate in the labour market, retain employment and stay in work longer;
- Provide access to a wider range of jobs and increasing the chances of employers and employees achieving the right skills match;
- Allow travel to and from school, college or university, which is allowing students to gain the knowledge and skills that will underpin the future West Yorkshire economy.
- Facilitate travel to and from shops and various leisure attractions. Collectively, it is estimated that bus users spend £27.2bn²⁹ annually on retail and leisure. Buses allow consumers to access shops and services more easily and enable them to source a wider range of products or take advantage of better prices. By supporting access to key retail locations, buses provide a platform for further retail development which can help local economies grow and prosper.

3.4 Importantly, as long as they are affordable buses are available to all. They allow those without a car, either through choice or because they cannot afford one, to access jobs and services. Without buses, it would be impossible for West Yorkshire's towns and cities to function in the way they do now and to grow to their full potential. By providing a high capacity alternative to car, they allow West Yorkshire's towns and cities to grow and to thrive.

BUSES SUPPORT INCLUSION AND PROVIDE ACCESS TO OPPORTUNITY

3.5 In addition to the economic benefits, the bus is an effective tool of social policy. Vulnerable and socially disadvantaged groups in society are often the most reliant on bus networks, including low income households; young people in education, those trying to enter the job market; older people; disabled people; and jobseekers. Bus services are fundamental to providing the jobless with access to work; young people to education and training; and providing a way out of social isolation for older and disabled people³⁰.

- 3.6 Access to the bus network should be considered within the current social context. The UK population is ageing; there are now 11.6 million people aged 65 or over in the UK and this is projected to rise by over 40 percent in the next 17 years to over 16 million. Twenty percent (12.9 million) of people in the UK reported a disability in 2014/15. The prevalence of disability rises with age, and the ageing of the population will lead to an increase in age-related illnesses, such as diabetes and dementia as well as reduced mobility.
- 3.7 These changes in UK demographics will greatly increase demand for public transport from older people and people with a disability. This will require improvement in the accessibility of public transport services in order to address the barriers that people with physical disabilities, hidden disabilities and cognitive impairments face when travelling.
- 3.8 Aspects of bus services supporting an inclusive society include:
- Enabling access to employment - In British cities outside London, 77% of jobseekers do not have regular access to a car, van or motorbike³¹.
 - Enabling affordable travel - affordable bus travel helps ensure that work pays and can be sustained. One in ten bus commuters would be forced to look for another job, or give up work altogether, if they could no longer travel by bus³².
 - Delivering concessionary travel – the element of the scheme for older and disabled people has proved very popular and has resulted in a large increase in the use of buses from these groups³³. In West Yorkshire over 49 million journeys were made using concessionary passes in 2014/15, representing 127 journeys each year per pass³⁴. The scheme provides passengers with better access to a full range of journeys apart from weekday morning peak travel and benefits spread beyond just the people who directly use it. Arguably, other bus users benefit from the additional services provided by operators to meet the increased demand from concessionary pass holders.
 - Promoting Independent living – the Access Bus services and the concessionary fare scheme enable many people to make independent journeys for which they would otherwise require support.
- 3.9 The Greener Journeys/KPMG research referenced earlier found that these benefits are significant - for every £1 spent on concessionary pass schemes, £2.87 in benefits is generated. Unusually, compared to many other forms of government funding for measures with a social dimension, a proportion of these benefits also accrue to non-users of the pass and to society as whole, in the form of lower congestion, reduced accidents, and reduced pollution, noise, and greenhouse gas emissions.

BUSES BENEFIT THE ENVIRONMENT, HEALTH AND WELLBEING

- 3.10 It was noted in Chapter 2 that poor air quality is also a major issue in West Yorkshire. Although buses currently contribute to this problem, the progressive introduction of lower emission diesel buses, hybrid and electric vehicles (together with the retro-fitting of buses already in service with high emissions), which are supported by Government funding initiatives, will allow the bus to support low-emission policies and therefore be part of the air quality solution.
- 3.11 Furthermore, buses actively contribute to the health and wellbeing of the community:
- Taking a bus almost always requires a walk to and from the bus stop and as a consequence buses offer an alternative to the sedentary lifestyles that cars encourage and contribute towards meeting daily physical activity targets – one return bus trip providing as much as half of the daily recommended level of exercise, with those making a return journey by bus averaging a daily walking distance of almost 1.3km, 2.5 times more than those who drive³⁵;
 - They enable people, particularly those without cars, to access health facilities, and sports facilities;
 - They support older and disabled people to maintain their independence, improving health and wellbeing, and reducing the costs of care.

4 Customer Focused Problems and Opportunities

- 4.1 If the bus is to play a significant role in meeting the economic challenge and delivering growth plans in West Yorkshire, investment in the bus network must be done in a way that exceeds passenger expectations, including, in particular, attracting customers that presently do not use bus services. Whilst there are a number of key strategic challenges associated with the Bus System, there are also a range of specific customer problems which the West Yorkshire Bus Strategy needs to address.
- 4.2 The problem identification has been informed by a number of evidence sources including:
- The annual Bus Passenger Survey by Transport Focus;
 - The West Yorkshire Tracker Survey;
 - Passenger complaints to WYCA during 2015;
 - Evidence from local available data sources (for example real time data)
 - Local and national case studies;
 - The conclusions of the earlier phases of consultation on the bus strategy; and
 - The conclusions of the First West Yorkshire consultation into 'New Bus for Leeds'.
- 4.3 Appendix D considers each of these sources of evidence against five thematic areas, to identify the key customer focused problems associated with the Bus System:
- 1. Bus Services & Infrastructure
 - 2. Fares and Ticketing
 - 3. Customer Experience
 - 4. Information & Brand
 - 5. Environment
- 4.4 An additional sixth thematic area on 'Accessibility' was included following the feedback through the Phase 2a public consultation.
- 4.5 The review in Appendix D shows that whilst the Transport Focus research demonstrates generally high levels of satisfaction with existing bus services in West Yorkshire (with overall levels of satisfaction amongst users being between 85% and 88% in each year from 2012 to 2015), satisfaction with value for money is lower and a range of problems associated with the Bus System in West Yorkshire remain.
- 4.6 The problems are analogous to aspects of local bus services which are known to be important in influencing passenger choices quoted in the 2016 Local Bus Market Study for the Department for Transport³⁶.

New Bus Users

- 4.7 The Transport Focus survey results, which generally show high levels of satisfaction with the exception of 'value for money' for fare payers, should be interpreted with care as this is a survey of existing passengers regarding their current journey experience. As such, these surveys do not capture the views of potential passengers or those who have stopped using bus services because of a poor customer / journey experience.
- 4.8 The analysis presented in Appendix D, encompasses public transport users and non-users and confirms demographic differences between bus users, rail users and non-users. Typically bus customers are more likely to be female, less affluent, under 25 or over 60. There is a difference in the demographic profile of bus and rail users, suggesting that the image of the bus could be a deterrent to those falling in other socio demographic groups.

- 4.9 A combination of the West Yorkshire Bus Strategy consultations which have already been undertaken with bus operators and experiences from elsewhere, lead to a conclusion that there is an inherent challenge in attracting substantial numbers of new customers to the existing bus product offer.
- 4.10 Non-users have different priorities and problems to existing bus passengers. Transport Focus research³⁷ identifies that non-users see a good bus network as being important to their local area (85% of people surveyed), but this support for buses does not always translate into a willingness to actually use them (72% of people would not). Only a quarter of people see this as being because 'people like me do not use buses', so other reasons must predominate. The four factors of most influence are:
- The Buses don't run where or when I want them to go;
 - Door-to-door journeys would take too long by bus;
 - The cost compared to the alternatives; and
 - The perception / image of the bus system.
- 4.11 Meeting passenger expectations, including attracting customers that presently do not use bus services, is fundamental in developing the actions, interventions and investments to deliver patronage growth. Customer focused delivery therefore needs to be at the heart of plans for achieving the outcomes of this strategy.

Summary

- 4.12 Based on the analysis of the available evidence sources, Appendix D concludes with a summary of the customer focused problems. It recognises that the significance of these problems is different for regular/irregular bus users and non-users. The problems can be summarised as:
- Buses are not always on time, and occasionally fail to turn up at all
 - Buses can take a long time to reach their destination, and the journey time can vary from day-to-day
 - The bus network is complicated and difficult to understand, meaning that it can be hard for new or infrequent users to work out which bus to catch
 - It can be difficult to work out which bus ticket offers the best value for money
 - Travel by bus is not always seen as a satisfactory experience (for reasons that could include poor customer service from drivers, safety concerns, poor cleanliness and comfort of vehicles)
 - Bus travel information can be inconsistent and / or not always easily available
 - It is difficult for customers to understand who operates their bus service, what WYCA does, who to contact if things go wrong, and where to find out information or to provide feedback
 - Some buses are old and the exhaust emissions can be harmful
 - Many people with disabilities can now travel more independently, but many still experience difficulties related to their impairment or disability in accessing transport.
- 4.13 Table 4.1 sets out the key issues within each of these problems that this West Yorkshire Bus Strategy needs to address. The evidence review also suggests that the greatest impact can be gained from driving up standards in punctuality, reliability and usability. The most recent Transport Focus research with both users and non-users³⁸ confirms the importance of providing a good product – a frequent, punctual and reliable bus service that provides value for money. These essentials form the most important element in building trust with passengers³⁹. The research noted that at the rational level, building trust with customers is through buses turning up consistently, running on time, operators coping with disruption, resolving problems and offering value for money. Delivering the essentials is at the heart of this rational element. However, the research also found that it is the more emotionally engaging factors that build real affinity. This includes things like staff 'going the extra mile', and leaving

the customer feeling that the company really does care about its customers. The role of the driver is paramount in this.

Table 4.1 Customer Focused Problems, issues and opportunities

Thematic Area	Headline problem	Issues identified through evidence review	Potential Opportunities
1. Bus Service & Infrastructure	Buses are not always on time, and occasionally fail to turn up at all Buses can take a long time to reach their destination, and the journey time can vary from day-to-day	Buses fail to turn up Buses not co-ordinated or integrated with the operation of the broader highways / rail network Limited bus priority Limited existing bus lane enforcement Insufficient strategic network planning On bus crowding particularly in the peak periods Empty buses operating across the network Insufficient use of data to develop services	Improve journey times Improve punctuality and reliability through priority measures and better driver training, revised timetables, better maintenance, reduce operating costs Network redesign increased emphasis on frequent services and potentially introduce express services. Reduce bus dwell times
	The bus network is complicated and difficult to understand, meaning that it can be hard for new or infrequent users to work out which bus to catch	Bus network is not clear to new or existing users Bus services are not sufficiently integrated with each other and other modes. Network is not responsive to passenger needs or responsive to changing land use Bus/rail interchange opportunities often unclear Inadequate service provision in some areas Duplication and 'over bussing' continues in some areas Complicated / unclear roles and responsibilities across various organisations in operating buses	Redesign the network through better integration of services and modes and through better links into local communities Limit frequency of network changes Brand and market the network as a single entity
2. Fares and Ticketing	It can be difficult to work out which bus ticket offers the best value for money	Fares are too complicated and not integrated Multi operator fares are only available at a premium. Complicated and multiple single operator fares options (e.g. over 100+ on a single corridor in Leeds) Tickets relate to operators not geography Fares are not perceived to offer value for money to the passenger Limited payment options with focus still on cash payment on bus vehicles, delaying bus services particularly on Monday when weekly tickets are more frequently issued. Limited and complicated information on fares Insufficient data available to develop fares structures which meet customer expectations	Change fare structures to provide targeted fare reductions and/or cheaper tickets targeted at specific users. Simplify ticketing range. Greater emphasis on multi operator ticketing. Reduce fare levels Remove operator own brand tickets. Introduce electronic ticketing, with best value fare identification and fare capping. Improve information on fares and ticketing. Reduce cash fares on bus with greater (and flexible) pre-payment options
3. Customer Experience	Travelling on a bus is not perceived to be a satisfactory experience	Driver behaviour can lead to a poor customer experience, especially for young people Perception of bus travel to non-users is poor Perception of safety concerns at stop and on vehicle, particularly in the evenings Vehicles are uncomfortable, noisy and misted up. Insufficient pram, wheelchair and cycle storage Limited CCTV Role of the driver too complicated – dealing with fares, customer service and driving vehicle. Limited Wi-Fi provision on vehicles and at stops.	Improve customer experience through focus on recruitment, improved staff training, better cleaning of vehicles, better on bus information, increased provision of Wi-Fi and newer/more accessible vehicles. Improve quality and maintenance of passenger facilities
4. Information & Brand	Bus travel information can be inconsistent and / or not always easily available	Inconsistent passenger information Not all services using the real time system Insufficient real time information provided to the customer Poor quality on line journey planner and lack of journey planner app encompassing all operators No dynamic in vehicle information Disruption information strategy to passengers does not exist	Improve both quality of information provided and its scope for example more information provided concerning fares. Marketing the network as a single entity, with a single point of information Increase level of information available through digital means
	It is difficult for customers to understand who operates their bus service, what WYCA does, who to contact if things go wrong, and where to	Passenger unclear about who is responsible for their bus service, or what the key points of contacts for customers are, or who is accountable when things go wrong Non users do not have confidence in the bus product	Clearer accountability and responsibility Clearer presentation of the system A highly recognisable 'one-stop shop' to build confidence

Thematic Area	Headline problem	Issues identified through evidence review	Potential Opportunities
	find out information or to provide feedback		
5. Environment	Some buses are old and the exhaust emissions can be harmful	<p>Diesel buses contribute significantly to harmful emissions in urban areas as set out in WYLES</p> <p>A significant proportion of the bus fleet is operating to emission standards which came into effect more than ten years ago</p> <p>Limited investment in hybrid and electric buses in West Yorkshire to date</p> <p>School services often use oldest vehicles which produce the worst emissions.</p>	<p>Further government grant funding to fund cleaner vehicle purchase and retro-fitting of older vehicles.</p> <p>New vehicles to meet environmental standards</p> <p>Delivery of the WYLES</p>
6. Accessibility <i>(Included following Phase 2a consultation)</i>	Many people with disabilities can now travel more independently, but many still experience difficulties related to their impairment or disability in accessing transport.	<p>In responding to the Phase 2b consultation on the draft Bus Strategy, older and disabled people highlighted the barriers to accessible travel that can leave people unable or unwilling to travel. These include difficulties with vehicle design and public transport infrastructure, information and customer experience as well as problems experienced by people who have hidden disabilities. Feedback also highlighted the importance of adopting inclusive design approaches in developing a bus network that is accessible to all sections of the population.</p>	<p>Adopt an inclusive approach to the design and delivery of the bus system, focusing on the whole journey.</p> <p>Improve the customer experience for older and disabled people through improved staff training, consistent customer service standards and improved awareness and accessibility of complaints processes</p>

5 The Vision & Opportunity

VISION

- 5.1 Drawing together the strategic challenges and the customer focused problems, a vision and set of objectives for the West Yorkshire Bus Strategy has been developed:

The West Yorkshire Bus Strategy Vision

To create a modern, integrated and innovative bus system, which puts customers first and contributes to the delivery of the economic, environmental and quality of life ambitions as set out in the Strategic Economic Plan and the West Yorkshire Transport Strategy

OBJECTIVES

- 5.2 From this vision the following objectives for the West Yorkshire Bus Strategy have been defined:
- To enable economic growth in West Yorkshire by improving connectivity to areas of economic opportunity;
 - To realise environmental aspirations, including significantly reducing local emissions; and
 - To support local communities by providing access to health services, education and employment, leisure and retail destinations.

CRITICAL SUCCESS FACTORS

- 5.3 The West Yorkshire Bus Strategy also identifies a number of critical success factors, which will help inform the future appraisal of delivery options. The delivery of the West Yorkshire Bus Strategy must:
- Put customers at the heart of the strategy;
 - Create a safe and secure environment for all (including both customers and industry employees);
 - Be affordable in terms of both public sector investment, and the long-term financial sustainability of the bus system (in terms of costs, margins and by growing revenues through growing patronage);
 - Achieve high levels of user and non-user satisfaction;
 - Maximise opportunities for modal shift, particularly from car to bus;
 - Optimise value for money; and
 - Create a financially sustainable framework which encourages long term investment to grow the bus system.
- 5.4 A growing bus market will generate additional revenue that can help fund further investment in the bus network to support the economic, quality of life and environmental improvements encapsulated within the West Yorkshire Transport Strategy.

THE TARGET FOR GROWTH

- 5.5 This document illustrates that the bus network in West Yorkshire is currently underperforming. Patronage decline over the last two decades shows that people across West Yorkshire are choosing not to travel by bus, even where it offers a reasonably attractive alternative to other modes. The changing local and national policy context provides the opportunity to establish a framework to challenge the status quo, and to enable bus services to fulfil their potential.
- 5.6 There is a substantial ambition to achieve a growth in employment of 85,000 over the next decade, through the delivery of the SEP and West Yorkshire Transport Strategy. There is a clear opportunity for buses to be at the heart of enabling these economic growth aspirations to be realised in a sustainable manner, connecting residents to employment, retail and leisure opportunities. Bus offers the flexibility to enable transport provision to adapt to these changes quickly, and to provide for the needs of present and future customers across West Yorkshire.
- 5.7 At its heart, this strategy aims to ensure that bus travel supports economic growth through meeting customer needs and alleviating constraints, thereby increasing patronage. Materially increasing patronage will help drive service enhancement. Rail and car alone are unable to accommodate the level of growth implied in the SEP, and if bus provision is not fit-for-purpose to accommodate the increased demand for travel, the consequences for the local economy could be significant. The result could be slower rates of economic growth across West Yorkshire.
- 5.8 Alternatively, the economic growth may take place anyway, but add car congestion, worsen air quality, and negatively impact road safety from increased levels of traffic. This would damage the long term viability of the economy, lead to significant adverse impacts to the health and well-being of the population. It is therefore seen as critical that the bus system is capable of meeting the needs of West Yorkshire's growing economy, and helps the City Region to deliver its economic growth aspirations in a way that improves and sustains the quality of life of people in West Yorkshire. In turn, this will increase bus patronage, helping to underpin the long term commercial viability and financial sustainability of West Yorkshire's bus system.
- 5.9 Overall, the opportunity to grow is significant. Work undertaken as part of the Bus Strategy in Appendix F illustrates:
- There is latent demand for bus use in the current system. If captured this would increase bus patronage by around 9%-12%;
 - Developing the network and services to enable the delivery of the SEP (and WYTS) could lead to an additional increase in ridership in the region of 7%-18%.

Whilst these are high-level estimates, they provide a context for setting a growth target for this West Yorkshire Bus Strategy. Based on this evidence, the ambition is therefore target 25% patronage growth from 2016 levels, over the next 10 years, but given the level of housing and employment growth forecast, it is not infeasible to target even higher levels of bus patronage. In addition, bespoke analytical economic research undertaken to value the Bus Strategy is providing in Appendix O and has demonstrated that delivery of these policies could lead to an economic benefit to the Region's economy of £455million PV over a 20-year period (GDP Deflator real 2010 prices). This equates to a potential revenue uplift of around £138million PV over a 20-year period (GDP Deflator real 2010 prices).

- 5.10 In setting this target, there are caveats. It is assumed that past actions will achieve broadly the same outcomes. The world is changing fast in terms of technology, and the impact that new technologies have on our lives cannot be readily foreseen. There is already evidence that the taxi/private hire sector is evolving and using mobile technology to drive passenger growth. Emerging technologies will further change travel behaviours⁴⁰. However, the impact of such changing technologies and our behavioural response to them, on bus use or on the use of any other means of transport, cannot be accurately forecast over the longer term. Equally, new technologies could support growth of the bus market.

6 The West Yorkshire Bus Policies

- 6.1 To deliver the goal of creating the best bus system in Europe and to achieve the objectives, a suite of complementary policies and associated measures are needed that address both the strategic challenges faced by WYCA and its partners, but also deliver the customer issues with the bus system. Chapter 2 summarised the strategic plans and challenges and chapter 5 summarised the customer focused problems associated with the bus system.
- 6.2 Overall it is clear that to deliver the bus strategy vision and objectives, no single policy will resolve the challenges and problems. Instead, a combination of joined up policies are required to successfully deliver the vision, objectives and targets, and to support the delivery of the SEP priorities and headline indicators.
- 6.3 The West Yorkshire Bus Policies are described in the remainder of this chapter.

1. YOUR CUSTOMER EXPERIENCE

- 6.4 The West Yorkshire Bus Policy is “to provide a consistent and excellent customer service across the bus system”.

Consistently excellent customer service across the bus system

- 6.5 Creating an environment which delivers a consistently excellent customer service is closely linked with the elements set out in the following section on information and branding. It seeks to create a consistent identity for the bus system, regardless of who operates the vehicles and employs the staff. This is key to creating a modern customer experience which encourages confidence, trust and long term loyalty in the bus system.

- 6.6 To deliver excellent and consistent customer service requires five key delivery elements:

- Recognising the challenges and importance of the role of bus driver in particular. Drivers should be provided with the necessary training and means to consistently meet customer expectations whilst undertaking a challenging front line role;
- A single customer portal for all West Yorkshire bus services where customers can obtain advice and assistance on any bus related matter. A range of services would be available including contact centre, lost property, journey planning, and ticket retail. The portal would be dynamic to provide up to date customer information and advice to passengers on the move during times of disruption. Whilst the “back office” functions may be distributed between areas or operators, they would be delivered to a consistent service standard to the customer;
- A focus on front line staff. Front line staff should provide a consistently excellent service at all stages of their journey (to a standard equivalent to high performing retail and hospitality companies), regardless of the organisation they are employed by. This requires consistent investment in the recruitment, training and management of front line staff to empower them to go the extra mile for customers. Standards of customer service, behaviours, processes and procedures are key to delivering exemplary service to a consistent level across the bus system. This should be supported by commonly used staff training materials and communication media. The move away from payment on-bus will simplify the customer service role of the driver creating a new retail service environment. Back office processes should, at times of disruption, provide front line staff with clear and concise information which they can pass on to the customer. Managers should empower front line staff to “do the right thing” for the customer. Feedback from customers should shape and monitor service standards which would be presented in a clearly articulated promise to customers. This promise would be reinforced by a commitment to continuous improvement through ongoing employee training and engagement;
- Using data and intelligence to understand and meet customer needs better. Delivering a step change in the customer experience requires a deep understanding of customers’ current and future needs. This can be obtained by deriving intelligence from sales and operational data, customer feedback and market research. The bus system across West Yorkshire needs to learn and apply the techniques used by the retail, digital and commercial sectors together with leaders in the transport field including Transport for London and the major international commercial operators. This approach requires a commitment by all parties to share and analyse data to the common good of the West Yorkshire bus system.
- All organisations involved in the delivery of the bus system should work together to provide a safe and secure environment for everyone; at interchanges, stops, shelters and on vehicles. This includes:
 - Providing customers with a welcoming and safe environment at all aspects of the bus system, including at stops and on vehicles. This is especially important for vulnerable groups and in

the evenings. This includes providing recorded CCTV which is of a standard that can be used for prosecuting offenders;

- Continuing to develop close partnerships with West Yorkshire Police and other emergency/security services;
- Apply best practice experience from elsewhere to the West Yorkshire Bus System;
- Meeting statutory duties under the Health and Safety legislation, including protecting the health and safety at work of employees and of others who could be affected by their activities; and
- Providing safe systems of work and safe plant and equipment.

6.7 Finally, as the face of the system, buses should also be tailored to customer expectations. This includes consistently operating the same vehicles on their identified services. For example vehicles used on express services would be dedicated to these services and would be specified and operated differently to high density radial services, a local rural bus vehicle or school vehicle. The exterior of the vehicle should be correct for the type of services it is operating with appropriate information displayed internally and externally. The interior of the bus would also reflect the type of service operated by the vehicle and provide the customer facilities that are expected from that specific service. This includes ensuring the right information internally and externally on the vehicle, including on board vehicle information displays, audio announcements, speedy and reliable Wi-Fi connectivity, and mobile device charging capability.

2. YOUR BUS JOURNEY

- 6.8 The West Yorkshire Bus Policy is “to provide modern, coherent and integrated bus services”.
- 6.9 This policy seeks to deliver beyond just the ‘essentials’ enabling the bus system to operate punctually to consistent standards, to cope with disruption and meet customer expectations. The policy also covers both the network of services and the infrastructure which supports it. Each is covered separately below but they are interlinked. Overall, the policy seeks to deliver consistent standards enabling the bus system to operate punctually, cope with disruption, meet customer expectations and provide value for money. Delivering the ‘essentials’ of a bus system is at the heart of a coherent, integrated and coordinated bus system.

Bus Services

- 6.10 The West Yorkshire Bus Strategy plays a pivotal role in enabling the delivery of the cross cutting ‘One Network’ and ‘Inclusion’ Core Principles within the West Yorkshire Transport Strategy. It is also fundamental to delivering the SEP headline indicators around creating an integrated, accessible bus system which meets the needs of people and business and also creating a fully integrated ‘metro style’ City Region public transport network.
- 6.11 The bus is flexible and if well managed, can be agile to changing demographics, land use and populations. The bus can make a positive contribution to the broader economic, accessibility and quality of life objectives set out in the West Yorkshire Transport Strategy. However, buses are part of a range of transport options available and may not always be the best option to meet the inclusion and accessibility requirements. Delivering bus services which meet the needs of local communities, towns and cities need to be considered against other all the transport options available (including car, walking, cycling, rail, taxi and dial a ride). Buses have a significant role to play, but other options may be better placed to meet transport needs in some areas.
- 6.12 Through an on-going process of regularly reviewing networks in accordance with best practice guidance, the key elements in developing bus services include:
- Providing bus services which link up new housing and employment developments (including the Spatial Priority Areas identified in the SEP) and which better integrate links with other modes of transport such as rail, cycling and walking;
 - Operating services which reflect where people want to travel, rather than reflecting administrative boundaries or traditional bus operator ‘patches’;
 - Improving connectivity, particularly between (urban and rural) communities across West Yorkshire and within deprived areas, to reach areas of high unemployment and the proactively help improve access to jobs and training, especially for those out of work and for apprentices and areas with skills gaps;
 - Providing an integrated, clear and legible network of services across West Yorkshire including those which extend beyond the West Yorkshire boundary;
 - Removing unnecessary service duplication to provide frequencies which cater for demand, “turn up and go” on routes of high demand, clock face timetables where serving a lower density community;
 - Regularly adapt services to an evolving demographic, economic, transport network and land-use landscape, within West Yorkshire and beyond;
 - Co-ordination of timetables and integration of facilities with other public transport modes and services;
 - Integrated communications to keep customers informed especially when things go wrong.
 - Ability to deploy additional bus resources to anticipate economic opportunities and to meet demand on popular routes and at busy times;

- Consistent service delivery standards across all services, robust monitoring, and clear and transparent reporting; and
- Improving access to wider range of jobs and travel to schools, colleges and universities.

6.13 Innovation in bus services could also include:

- Creating bus services which support the delivery of the Northern Powerhouse, as well as HS2 hubs;
- Better interchange between bus, rail and other modes;
- Efficient matching of bus resources to demand, to avoid service duplication;
- Development of a key route network of services, which includes consistent 'red-route' style powers used along key corridors.
- Frequent services operating later into the evening
- A new night bus network
- New park and ride sites and services
- A network of fast and frequent express services
- Encouraging community and door to door transport opportunities

6.14 Together, these elements will improve connectivity into and within local communities (especially those in rural areas), as well as helping to reduce the operational cost base of the West Yorkshire bus system.

Bus Infrastructure

6.15 The operation of the highway network is key to the successful delivery of bus services. Working closely with the District Highways Authorities is key to maintaining the existing infrastructure. Highways investments which supports the 'Green Streets' principles and deliver bus priority, congestion reduction and highway efficiency will help to reduce journey times, improve reliability/punctuality and also reduce the operating cost base of the bus system, whilst also creating a more resilient bus infrastructure future proofed against climate change.

6.16 The West Yorkshire Bus Strategy encourages investment in green infrastructure projects, (including schemes within the West Yorkshire plus Transport Fund) that will help contribute to improving conditions for buses in addition to improving the general effectiveness of the local highway network. Schemes already identified for delivery include:

- The Highways Efficiency Bus Package and Key Route Network programmes;
- A650 Tong Street Corridor Improvements;
- Wakefield City Centre Package;
- Aire Valley - Leeds Integrated Transport Package;
- A629 Halifax to Huddersfield Corridor;
- A65 to the Airport Link Road, Leeds;
- Leeds city centre network improvements; and
- Other new rapid transit / BRT / light rail links.

6.17 Furthermore, other often smaller scale interventions can play a significant role in improving journey times, reliability, and frequency for services. In order to provide services which cater for local demand so that there are a range of services For example, 'turn up and go' services on routes of high demand and simplified timetables where they are serving a lower density community. In Manchester Quality Bus Corridors showed that investment has delivered 8.9% patronage growth over 3 years; and evaluation of

the London 'Countdown' real time information investment showed a further 1% increase in passenger numbers (see Appendix E). Initiatives to be supported include:

- Traffic light priority measures to give buses priority over other vehicles at junctions;
- Continued investment in bus lanes;
- Improving pedestrian facilities to improve the accessibility of bus stops and interchanges;
- Enforcement of bus only facilities and parking restrictions;
- A maintenance regime for bus routes to support bus service delivery and enhance passenger comfort, including priority for re-surfacing on key bus routes as necessary.

6.18 To improve punctuality and journey times, continued maintenance of existing infrastructure must be complemented by investment in new infrastructure. Targeted infrastructure improvements to make bus journeys quicker and more reliable this could include investment in:

- New segregated bus priority lanes;
- Priority for buses at traffic signals across West Yorkshire; and
- Reliable real time and audio visual information on all services.

6.19 Investment will also be required to improve interchange and waiting facilities, with high standards of design and finish in support of the West Yorkshire Transport Strategy principle to make cities, towns and neighbourhoods more attractive places to live, work, and play. For example, investment in a new Mansfield Passenger Transport interchange saw 7% increase in bus passengers in the first year, and research by Crime Concern on investment to improve security at bus stops estimates that improved bus stop security could increase patronage by more than 10% (see Appendix E). Measures that would support the delivery of the West Yorkshire Bus Strategy include:

- Urban realm schemes in town and city centres that reflect the needs of bus users;
- New hubs and refurbished/modernised interchanges/bus stations;
- Modern waiting areas which provide passenger safety, comfort and make neighbourhoods more attractive places to live, work and play;
- CCTV and high quality lighting to help support personal security and safety for users of the system; and
- Clear signage and information points.

6.20 Effective management of bus services at times of disruption requires close integrated communication links between bus operators, urban traffic control and the Police. This coordination should provide clear guidance to both customers and bus drivers.

3. PAYING FOR TRAVEL

- 6.21 The West Yorkshire Bus Policy is “to provide integrated, simple and affordable bus fares for all”. This policy includes:
- Integrated: One fare for each journey, no matter which bus company runs the service;
 - Simple: A handful of products across all West Yorkshire bus services.
 - Affordable: To provide reasonably priced fares that offer value for money.
 - In addition, it is proposed that there continues to be a focus on providing concessionary travel fares for younger and older people and those with disabilities.
- 6.22 These elements for consideration will encourage and incentivise the loyalty of customers to the West Yorkshire bus system.
- 6.23 Flexibility in ticketing paying for a journey are increasingly important to customers. Whilst in the short term there continues to be a need for cash fares paid to the bus driver, as other payment methods become available over time and as the ticket product range becomes simpler there will be a natural progression to cashless payment away from the bus driver, as is now the case throughout London. Key ticket payment elements of the West Yorkshire Bus Strategy includes:
- Contactless / prepaid smart ticketing, with off-bus purchase the norm; and on-bus cash minimised to reduce driver-passenger cash transactions;
 - A system which allows customers more convenience and choice in buying a ticket to suit customer preferences, focussing on cashless methods;
 - A simple ticketing retail system with the appropriate level of systems support;
 - Developing an account based payment system where customers pay for their travel direct from their bank account;
 - Moving away from cash will contribute to improving journey reliability by minimising bus boarding times and developing a closer relationship with the customer.
- 6.24 In combination with simplifying the ticketing product range, moving away from cash will reduce bus journey times, improve reliability, increase customer confidence and help reduce the cost base of the West Yorkshire bus system.

4. PLANNING YOUR JOURNEY

- 6.25 The West Yorkshire Bus Policies are to:
- Provide easily accessible and reliable travel information
 - Present the bus system as a single network
- 6.26 This includes delivering the elements outlined in the Your Customer Experience section above, plus:
- Developing a clear, simple and consistent brand across West Yorkshire for specific services, including express, local, night bus or rural services;
 - Using bus information to promote key locations/destinations that are accessible by bus;
 - Encouraging customer 'self-service' and the move to digital information including social media, web and apps, to meet the fast changing requirements of customers;
 - Focus printed bus information where it is most effective in promoting bus travel;
 - Journey planning to provide fares as well as route / service information;
 - Provide real-time information (including, for example audio and visual information) before and during the journey;
 - Coordinate the promotion of the lifestyle benefits of travelling by bus;
 - Providing travel information, including disruptions, that enables informed choices throughout a journey;
 - Supporting employers in providing bespoke information about bus services and ticketing products to their employees;
- 6.27 Investment in improved information is fundamental at the points of entry to the bus system, at bus stops, bus stations, and interchanges, including:
- Providing customers with choice in how they receive high quality and reliable information for all bus services;
 - Timetables that are clear to read and easy to understand, and provide information regarding connecting services;
 - Real-time displays at more stops and access to real time information across the Bus system;
 - Providing Wi-Fi, and making use of other digital technologies; and
 - Provide information about all fares, as well as routes and services on journey planning tools.

5. THE ENVIRONMENT

- 6.28 The strategy aims to enable the delivery of both the WYLES short term and longer term aspirations. The West Yorkshire Bus Policy is to create “a modern, low carbon bus system which contributes to improved air quality.”
- 6.29 This will be achieved by:
- Developing a bus fleet that has a positive impact on health and environment, with consistent year on year improvement;
 - To meet the legal health standards for air quality by ensuring older buses are modernised or replaced through investment to reduce local emissions.
 - All vehicles new to West Yorkshire would be required to meet at least the latest environmental standard¹ as a minimum.
 - New vehicle technologies which move towards near to zero vehicle emissions will also be encouraged.
 - Support to establish clean air zones across West Yorkshire.
 - Raising public awareness around bus emissions standards particularly around EURO VI.

Clean Air Zones

- 6.30 Government has set out its plans to improve the UK’s air quality, reducing health impacts, and fulfilling its legal obligations. The DEFRA Air Quality Plans sets out an approach for meeting these goals by implementing a programme of Clean Air Zones and that five cities outside London, comprising Birmingham, Derby, Leeds, Nottingham and Southampton will be legally required to introduce Clean Air Zones (CAZ) in the shortest possible time and by 2020 at the latest. DEFRA has identified CAZ classes relating to the vehicles that need to be included in the CAZ. Leeds will be required to implement a class C CAZ where all included vehicles will be required to meet a Euro VI Standard for buses, coaches and HGVs and a Euro 6 (diesel) or Euro 4 (petrol) Standard for taxis and LGVs
- 6.31 Other cities across West Yorkshire are also considering introducing Clean Air Zones. To ensure that there is a clear and consistent approach to implementing and enforcing CAZ in West Yorkshire, WYCA, in partnership with the district authorities will develop and adopt agreed shared policies and actions for Clean Air Zones. Alternative Vehicle Technologies
- 6.32 While we will continue to work with bus operators to progressively reduce harmful emissions from existing diesel buses, we will also seek to promote the greenhouse gas benefits of moving away from diesel to alternatively fueled buses such as biomethane and electric technologies.
- 6.33 We will build on the experience of other towns and cities in supporting diesel alternatives. Biomethane buses have been successfully rolled out in Sunderland, Darlington, Reading, Beccles, Runcorn and Bristol and both Bristol and Nottingham, 2 of the 4 Ultra Low Emission Cities in the UK have plans for significant growth in biomethane buses. Cities such as London, Nottingham, Milton Keynes and Coventry have successfully introduced electric buses. While the capital cost of these buses is higher than standard diesel buses, there can be significant fuel and maintenance savings provide overall savings to operators.

¹ Currently Euro VI

Sustainable Travel

- 6.34 Technological solutions alone are not enough to meet the longer term aspirations around air quality. In order to be most effective in lowering emissions, they should be accompanied by the creation of the right conditions for public transport undertakings to form the backbone of urban mobility.
- 6.35 Delivery of the range of combination of policies outlined in this document will help encourage bus patronage growth. This will help create a more environmentally sustainable, low carbon transport system, which is integrated with other sustainable modes of transport, such as cycling, walking and car-sharing schemes.
- 6.36 To complement this, designing bus infrastructure which accords with the principles of 'green streets' will further help support the headline indicators in the SEP around green infrastructure, as it will help improve resilience to climate change and also encourage more sustainable travel.

6. ACCESSIBILITY

- 6.37 The West Yorkshire Bus Policy is “to provide an inclusive and accessible bus system.”
- 6.38 This policy seeks to ensure that the bus system is accessible to our customers and communities. To achieve this, we propose:
- Involving our communities, including older people, disabled people and young people in the design and delivery of the bus system
 - Providing an inclusive customer experience
 - Providing information which meets best practice guidelines and statutory requirements
- 6.39 Delivering an inclusive and accessible bus network is closely linked with and complementary to the other West Yorkshire Bus Strategy policies.
- 6.40 Delivering an accessible and inclusive bus system requires the following key elements:
- Establishing a ‘reference’ group to work in an accessibility advisory capacity on the development of projects and services, and maintaining dialogue with stakeholder groups through regular communications and engagement. Adopting an inclusive design approach, ensuring that disabled and older people as well as young people are more involved in how the West Yorkshire bus network is planned and delivered will ensure that the network addresses the needs of the widest possible audience. Inclusive design means designing for a bus network that is accessible, safe and easy to use – with a focus on the whole journey including journey planning, stops, shelters and bus stations, vehicles and the journey experience.
 - Embedding disability awareness training for transport staff. The Customer Experience Policy proposal states that front line staff should provide a consistently excellent service at all stages of the journey. Embedding disability awareness training within this commitment will ensure that transport staff can understand the needs of people with different support needs.
 - Ensuring that complaints procedures are accessible and well promoted. Customers need to know how to complain, the way the process works, and the process should be inclusive. This means knowing who to contact about specific issues and being able to do so in a way that is accessible to the individual, with complaints accepted in a variety of ways.
 - Recording and monitoring accessibility related complaints and using data to inform service improvements. Feedback from customers should shape and monitor service standards; recording and monitoring accessibility related complaints will enable the identification of any underlying issues and will be reinforced by a commitment to continuous improvement.
 - Adopting a clear, consistent policy on the use of wheelchair priority spaces. The use of priority wheelchair spaces on buses continues to be an area of confusion for customers. A Supreme Court ruling on this issue was made in January 2017 and clarity for passengers and transport staff will be reinforced by the adoption of consistent approaches to signage, information for drivers and for passengers.
 - Adopting a Customer Service Charter, including a section on accessibility, enabling customers to know what to expect when they travel. There is a lack of clarity amongst customers about their rights and what to expect when they travel on the bus network. A Charter would make clear to all customers what they can expect in terms of their travel experience, and would include specific details on meeting the needs of customers who are disabled, or whose mobility is impaired.
 - Providing information which meets best practice guidelines and statutory requirements. The provision of easily accessible and reliable information is crucial to all users of the bus network. The Planning your Journey policy proposal focuses on the provision of customer information, and the elements of the policy will be developed in accordance with relevant accessibility standards. The Bus Services Act gives local transport authorities opportunities to improve bus services in their

areas and strengthens arrangements for partnership working with bus operators; it also includes the provision of audio-visual accessible information. The provision of audio visual information is included within the Customer Experience Policy proposal which includes ensuring the right information internally and externally on the vehicle, including on board vehicle information displays and audio announcements.

7 Supporting the delivery of the Strategic Economic Plan

7.1 As set out in chapter 2, the Strategic Economic Plan is the top level strategy document for WYCA and will guide all the work that WYCA and its economic partners deliver. The Strategic Economic Plan (SEP)⁴¹ is the long-term plan, which sets out the economic ambitions for the Leeds City Region and how partners will work to achieve them.

7.2 The SEP introduces the concept of good growth with a focus on sustainability, inclusion and quality of life. The SEP vision is:

“To be a globally recognised economy where good growth delivers high levels of prosperity, jobs and quality of life for everyone”

7.3 By adopting a bus strategy which provides a policy framework aligned to the SEP priorities and targets a growth in use over the next 10 years of at least 25%, the bus system will enable the growth of the local economy and will support the realisation of the SEP vision. In particular the bus strategy will help support the SEP Headline Initiatives by:

- Creating an integrated, accessible bus system which meets the needs of people and business and connects new and existing centers of work and of population; including transport infrastructure and services to support the growth and regeneration of Spatial Priority Areas;
- Creating a more efficient and resilient use of highways network, optimised by real time traffic management and information systems, providing new or improved access to unlock development, and where possible designed to move traffic away from town and city centers;
- Helping create more and better jobs for the region;
- Helping to support the creation of a fully integrated ‘metro style’ City Region public transport network, by integrating bus and rail networks that deliver what customers want and which support growth, inclusion, accessibility and sustainability;
- Enabling the exploitation of new and ‘smart’ technologies to provide travel information, smart ticketing and payment systems and better traffic management;
- Taking a lead on sustainability through: reduction of carbon emissions and air pollution from transport; the achievement of clean air standards and the creation of liveable centers and neighbourhoods; action to reduce the demand for car travel, encourage healthier choices and support electrified transport options; and
- Ensuring that the transport system serves all communities, including rural areas and those with higher proportions of disadvantaged people.

Economic Impact of the West Yorkshire Bus Strategy

7.4 Bespoke analytical economic research undertaken to value the Bus Strategy is providing in Appendix O and has demonstrated that delivery of these policies could lead to an economic benefit to the Region’s economy of £455million PV over a 20-year period (GDP Deflator real 2010 prices). This equates to a potential revenue uplift of around £138million PV over a 20-year period (GDP Deflator real 2010 prices).

7.5 The specific contributions that the Bus Strategy makes to Single Economic Plan (SEP) four priority areas are described below:

SEP Priority 1, Growing Business

7.6 The West Yorkshire Bus Policies will help improve connectivity, for instance, speeding up journey times, making services more reliable, promoting seamless travel through better information, easier

interchange and more integrated ticketing. This will have a significant impact on the local economy. Improved bus services will offer more travel choices for commuters, and should help ensure that workers can reach their employment on time and that business travel can take place efficiently, thus supporting improved productivity and innovation for businesses. This helps provide businesses with the confidence that they need to expand and take on new workers. As patronage rises it will be possible to develop the bus network with more frequent services on key routes, services that improve inter-urban connections and totally new routes that service areas of new development – particularly housing and employment growth areas including the spatial priority areas identified within the SEP.

- 7.7 Better and more efficient use of the highway network will also contribute to improved and more robust supply chains, enabling business to trade more effectively and generally underpin the case for higher levels of private investment. This will boost business growth, productivity, exports and investment.

SEP Priority 2, Skilled people and better jobs

- 7.8 The policies outlined in this document, particularly in the areas of faster and more reliable journey times, and improved inter-urban services will extend labour catchment areas and unlock agglomeration benefits. This will help deliver the SEP ‘more jobs, better jobs’ programme to widen employment, skills, apprenticeships and progression opportunities.
- 7.9 The widening of labour catchment areas will be particularly of benefit to high-value town and city center-based employment, making it more attractive for local companies to grow and others to relocate to West Yorkshire. In the area of specialist skills any widening of catchment is beneficial in helping the labour market to become more flexible.
- 7.10 The enhanced connectivity proposed through the bus strategy will improve access to local universities, higher and further education colleges, which are the key players responsible for raising skill levels amongst the local workforce. Many of these institutions are not situated in local centers. Improved interchange between public transport services and more integrated ticketing will be an important element of the changes needed to make them more accessible, and enhance their appeal to potential students and apprentices. Students often stay within their new localities following the completion of their courses and access to jobs and opportunities through good local public transport can be factor in encouraging them to come to West Yorkshire and remain there after a period of study.

SEP Priority 3, Clean energy and environmental resilience

- 7.11 The progressive ‘greening’ of the bus fleet is an important element of the bus strategy. The strategy envisages moving towards the full introduction of a ‘zero-emission’ fleet over the next 20 years through an increasing reliance on alternative fuel sources for buses. Delivery of the proposed policies will help make West Yorkshire and thus much of the Leeds City Region become a leading edge center for zero carbon energy.
- 7.12 This will have both local and global impacts. Locally, ‘dirty’ diesel technologies which pollute the local environment will be displaced by vehicles with no tail-pipe emissions. This will make an important contribution to cleaning up our town and city centers and making them healthier places to shop, do business and enjoy leisure activities. At a global level, reduced carbon and NOx emissions will play their part in moderating climate change and improving environmental resilience.
- 7.13 As greater passenger numbers are achieved by bus, buses reduce their harmful emissions, and motorists shift towards the bus service, a more sustainable transport network is created. This is in addition to the reduced level of traffic congestion that also results.
- 7.14 Overall the bus strategy will support climate change adaptation and the high quality greening of the infrastructure, will help create a more sustainable transport network which will help realise the priority.

SEP Priority 4, Infrastructure for Growth

- 7.15 The policies set out in this strategy will help facilitate the delivery of the West Yorkshire Transport Fund schemes, as well as a range of other infrastructure proposals. In addition to this, the delivery of the combination of policies will help create the single 'metro style' public transport network which is connected to major national/northern schemes such as HS2 and northern powerhouse agendas. In particular, the bus system will play a key role in taking people from major HS2 hubs, to their final local destination. The policies outlined in this strategy will enable this to happen.
- 7.16 Bus and associated highway infrastructure improvements will be improved to ensure that efficient bus services play their full role in supporting economic growth. The twin emphases will be better interchange facilities to improve the bus services, together with an upgraded highway network to provide for all users but particularly to improve the efficiency of bus services.
- 7.17 The development of the bus network is an important part of the justification for specific infrastructure investment decisions envisaged in the West Yorkshire Transport Strategy, notably the Highways Efficiency & Bus Package and Highway Network & Efficiency Package. The growing level and share of bus passengers in the local travel market help underpin this investment on behalf of all highway users. The general switch from car to bus is an important outcome that will allow existing and new transport infrastructure to function effectively, thereby assisting the growth of the local economy.

8 Conclusions

- 8.1 The West Yorkshire Bus Strategy sets out the policy context and the key problems and challenges facing customers and the industry. It sets out the vision, objectives and critical success criteria as well as the importance of creating a bus system which supports the delivery the Strategic Economic Plan vision and priorities.
- 8.2 Through analysing evidence, the strategy identifies that there is potential to grow bus patronage. Other cities across the UK and Europe are seeing bus patronage growth, and evidence in West Yorkshire shows that latent demand does exist and that there is untapped potential for increasing bus patronage. Adopting a plan for bus patronage growth of less than 25% could put at risk the delivery of economic growth plans.
- 8.3 To adopt this vision, deliver this growth, and to resolve the combination of problems identified, the Bus Strategy sets out a blend of coordinated and ambitious policies. These are set out against a range of themes that were identified in chapter 6 and can be summarised as:
- **Your Customer Experience:** To provide consistent and excellent customer services across the bus system.
 - **Your Bus Journey:** To provide modern, coherent and integrated bus services.
 - **Paying for Travel:** To provide integrated, simple and affordable bus fares for all.
 - **Planning your journey:** To provide easily accessible and reliable travel information and to present the bus system as a single network.
 - **The Environment:** To provide a modern bus system which contributes to improved air quality.
 - **Accessibility:** To provide an inclusive and accessible bus system.
- 8.4 Bespoke analytical research undertaken to value these bus policies has demonstrated that delivery of these policies could lead to an economic uplift to the Region's economy of £455million.
- 8.5 Together these measures will support the recently-updated Leeds City Region Strategic Economic Plan's target of sustained and healthy economic growth and will help realise the strategic challenges facing the industry, as they:
- Put the customer at the heart of the service at all times;
 - Turn long-term decline into consistent growth in bus use;
 - Set a local framework that does away with harmful on-the-road competition and improves value for money for passengers and tax-payers alike;
 - Ensure that all players in the bus industry are working towards common goals, and that private sector skills are harnessed effectively to deliver this plan;
 - Define responsibilities within the local industry thereby providing clear accountability for the customer;
 - Exploit the new national policy framework being delivered by the forthcoming Bus Services Act to the benefit of passengers and tax-payers;
 - Facilitate more efficient use of resources, but also increase the opportunity to tap into new major capital sources of funding;
 - Improve the environment in which the private sector will want to invest more aggressively as it plays its part in growing the bus system;
 - Bring clear alignment to the emerging ticketing strategy through Transport for the North;
 - Improve air quality, particularly in urban areas; and

- Ensure data is collected and shared effectively for the good of the passenger.

8.6 From a customer perspective, the ambitions will create a bus service which:

- Enables customers to access the places they need to visit, at the times they want to travel;
- Is clear and legible with a readily understandable set of routes and interchange hubs
- Offers high frequency services, with simple and consistent information, where demand permits
- Operates to high standards of reliability (the bus operates) and punctuality (it operates according to the published timetable)
- Offers a simplified range of ticket products, which are increasingly sold off the bus
- Provides excellent standards of customer service
- Meets customers' expectations of safety and comfort at all times on all parts of the journey; and
- Moves steadily towards a zero-emission fleet that has no adverse effect on public health or the local environment
- Steadily introduce a more clearly differentiated bus network that enables different, but customer driven, standards to be applied to:
 - An express element that complements the local rail service, and improves links between poorly connected urban areas within and close to West Yorkshire;
 - A high frequency service on main urban routes, that deliver a 'turn up and go' service; and
 - A local connections service that feeds customers into the other two parts of the network, or into minor rail stations.
- New services to areas where demand is emerging through land-use changes, enabling new housing areas to be sustainably developed, and new employment opportunities to be available to all people of employable age.
- A growing network of services that operate during the night to support the 24 hour economy, in those places that justify such extension.
- Greater use of taxis and taxi-buses to deliver improved accessibility in areas where a conventional bus services is not the most appropriate solution.

9 Delivery of the Bus Strategy

- 9.1 The West Yorkshire Bus Strategy has a 20 year planning horizon and in the medium term, in the context of finalisation of the guidance and secondary legislation of the new Bus Services Act, WYCA, with its partners will assess how to deliver the Bus Strategy (including potential delivery routes such as Partnership and Franchising).
- 9.2 In the short term, to complement the development of the West Yorkshire Bus Strategy, WYCA is working in partnership with bus operators through 'Bus2018'. Bus2018 is a programme of initiatives to improve services for bus passengers in West Yorkshire jointly delivered jointly by bus operators (as represented by the 'Association of Bus Operators in West Yorkshire' called 'ABOWY') and West Yorkshire Combined Authority. The objectives for Bus2018 are that schemes must;
- Be deliverable before the end of 2018;
 - Provide tangible benefits to the customer;
 - Be deliverable within the current legislative framework;
 - Minimise any additional governance requirements; and
 - Not constrain any party in terms of the longer term strategy
- 9.3 Buses 2018 includes a range of short term measures in a number of areas, around network stability, communications with young people, air quality, ticketing, punctuality, customer service, information and communications are being developed by WYCA with the ABOWY.
- 9.4 In the medium/longer term, decisions regarding *how* the West Yorkshire Bus Strategy is delivered will be developed in the context of the new legislative powers available to this region through the Bus Services Act and in taking into account the performance of the current partnership. The main consideration will be determining whether the partnership is delivering the objectives and vision of the West Yorkshire Bus Strategy.

Glossary

Agglomeration –the benefits that firms obtain by locating near each other ('agglomerating'). This concept relates to the idea of economies of scale and network effects.

Bus Reform workshops – Seven workshops in five locations held by DfT which aimed to give local authorities, bus operators and other interested stakeholders an opportunity to share their views on bus franchising, the Buses Bill, and alternatives to franchising.

Buses Bill (2016) – a proposed parliamentary bill expected to enhance the regulation of the bus industry in England, outside London, including providing both enhanced partnership powers and a revised approach to bus franchising.

Cycle Super Highway – Infrastructure to deliver safer and more direct journeys.

DfT – Department for Transport.

English National Concessionary Travel Scheme – a mandatory bus concession for older and disabled people, which has been in place since 2001. The scheme has gradually been extended and since April 2008 has provided free off-peak local bus travel to eligible older and disabled people anywhere in England.

Green Infrastructure is defined as “a network of multi-functional green space, urban and rural, which is capable of delivering a wide range of environmental and quality of life benefits for local communities.” (Department for Communities and Local Government, 2012, p.52).

Green Streets offers the Northern LEPs an ambitious green vision for resilient northern city regions where 21st Century eco-business centres are connected to vibrant and healthy communities by green transport routes.

Greener Journeys - a coalition of bus operators, campaigners and public sector organisations.

Growth Deal – a £1bn-plus fund from the government, with devolved powers, for investment in the Leeds City Region.

GVA – Gross Value Added - a measure of the contribution to the economy of each individual producer, industry or sector in the United Kingdom.

Leeds City Region Strategic Economic Plan – long term vision for the economy of Leeds City Region.

Metro – brand used by WYCA to promote public transport, including services, information, and ticketing products across West Yorkshire. Formerly the trading name of the passenger transport executive body now incorporated into WYCA.

Northern Powerhouse Rail – is a transformational vision for rail in the north. This is a vision to substantially improve rail connectivity between the main cities of the North and includes proposals for a new east-west high speed rail link, also referred to as High Speed 3 (HS3).

NOx – Nitrogen oxides. Includes pollutants associated with health conditions.

Office of Rail and Road – Independent safety and economic regulator of Britain's railways and strategic roads, the latter including monitoring the role of Highways England.

Passenger Focus – The former name for the independent transport-user watchdog. Became Transport Focus in March 2015 and began to represent users of the Strategic Road Network, as well as public transport passengers.

PMn – Particulate Matter – Particle pollution found in air, often associated with respiratory and other health conditions.

PTEG (pteg) – the former Passenger Transport Executive Group, recently renamed the Urban Transport Group

Strategic Growth Centre – Eight areas which are identified as centres for growth in the Leeds City Region Strategic Economic Plan (SEP). These include: the city and town centres of Barnsley, Bradford, Halifax, Huddersfield, Leeds, Wakefield and York along with the Aire Valley Leeds Enterprise Zone.

TICCO – The West Yorkshire Ticketing Company. TICCO is constituted of public transport operators and WYCA, and makes decisions on fare levels and revenue distribution for multi-operator products, based on voting rights which reflect respective market shares (2 votes for rail operators, 2 for First Group, 1 for Arriva, 1 for Transdev, 1 for small operators and 1 for WYCA).

Ticketing Block Exemption – a statutory exemption from EU competition rules that applies to enable the implementation of certain ticketing schemes which would otherwise be deemed to be anti-competitive, where they provide benefits to consumers.

Transport Focus - see Passenger Focus

Transport for the North (TfN) – a body which brings together local transport authorities and combined authorities across the North of England, to be constituted as a sub-national transport body in 2017. Northern city regions are acting collectively as TfN working with Local Enterprise Partnerships, Government, Highways England, HS2 Ltd and Network Rail through the TfN Partnership Board to develop a Northern Transport Strategy.

Urban Traffic Management Centres – Control the traffic management system to reduce congestion and improve journey times.

Urban Transport Group – formerly known as PTEG, brings together and promotes the interests of Britain's largest urban areas on transport.

WYLES – West Yorkshire Low Emissions Strategy

WYCA - West Yorkshire Combined Authority (WYCA) was established in April 2014 as a strategic authority responsible for transport, economic development and regeneration. It covers the five West Yorkshire Districts (Bradford, Calderdale, Kirklees, Leeds and Wakefield). WYCA aims to raise quality of life in West Yorkshire by encouraging the right conditions for economic growth which will enable job creation, opportunities for skills development, and new affordable homes; all supported by a modern, integrated transport network.

West Yorkshire Tracker Survey – Annual opinion survey of transport users in West Yorkshire, now commissioned by WYCA.

West Yorkshire plus Transport Fund - £1bn fund to underpin growth by improving the roads and railways within the City Region.

References

- 1 West Yorkshire Combined Authority (2014). West Yorkshire Local Transport Plan 2011-2026 Annual Monitoring Report 2014 Working File, 5th June 2014: Morning peak (07:00-10:00) inbound to all major city centres.
- 2 See for example www.greenerjourneys.com
- 3 pteg (2013). The Case for the Urban Bus.
- 4 Mackie, Laird and Johnson (2012). Buses and Economic Growth: Main Report
- 5 The Strategic Economic Plan (SEP) was adopted by the Leeds City Region Enterprise Partnership and WYCA in 2014.
- 6 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/481704/2012-based_household_projections_England_2012_to_2037_Stage_2_household_types_and_national_variants.pdf
- 7 <http://www.westyorks-ca.gov.uk/WorkArea/DownloadAsset.aspx?id=4294968086>
- 8 The WYLES has been developed by the five West Yorkshire local authorities and WYCA, with input provided by District Council Directors of Public Health and by Public Health England.
- 9 Transport for the North Spring 2016 Business Plan.
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/505705/northern-transport-strategy-spring-2016.pdf
- 10 KPMG (2016) Local Bus Market Study, report to the Department for Transport
- 11 KPMG (2016) Local Bus Market Study, report to the Department for Transport
- 12 Competition Commission: Route and Urban Area Analysis: Summary of Findings
- 13 Competition Commission: Local bus services market investigation: A report on the supply of local bus services in the UK [page 8-46]
- 14 KPMG (2016) Local Bus Market Study, report to the Department for Transport
- 15 Metro (2011) using Competition Commission analysis
- 16 KPMG (2016) Local Bus Market Study, report to the Department for Transport
- 17 CMA letter 29 Feb 2016 to Chief Executive Officer and Director of Transport Local Transport Authority
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/504172/CMA_open_letter_to_LTAs.pdf
- 18 Competition Commission: Route and Urban Area Analysis: Summary of Findings
- 19 Appendix J to bus plan
- 20 First West Yorkshire Ltd (2015). Report and Financial Statements for the 52 week period ending 28 March 2015.
- 21 First West Yorkshire Ltd (2015). Report and Financial Statements for the 52 week period ending 28 March 2015.
- 22 Operating Review, FirstGroup plc: Half-yearly results for six months to 30 September 2014, published 5 November 2014, and repeated each 6 months since then.
- 23 Keighley & District Travel Limited (2014)., Directors' Report for the 52 week period ended 20 December 2014.
- 24 Route One magazine (2014). 'TLC Travel – Building a niche operation', published October 2014.
- 25 Greener Journeys: www.greenerjourneys.com
- 26 <http://www.urbantransportgroup.org/>

-
- 27 Mackie, Laird and Johnson (2012). Buses and Economic Growth: Main Report. and Johnson, Mackie and Shires (2014). Buses and the Economy II: Main Report.
- 28 pteg (2013). The Case for the Urban Bus.
- 29 Mackie, Laird and Johnson (2012). Buses and Economic Growth: Main Report
- 30 pteg (2013). The Case for the Urban Bus.
- 31 Johnson, Mackie and Shires (2014). Buses and the Economy II: Survey of bus use amongst the unemployed, 2013.
- 32 Mackie, Laird and Johnson (2012). Buses and Economic Growth: Main Report.
- 33 Greener Journeys: www.greenerjourneys.com
- 34 DfT Bus Statistics (2015). Table BUS0823: Concessionary bus journeys by Travel Concession Authority (TCA) in England.
- 35 Mindlab (2011). Why Taking the Bus is Good for You (Mindlab research reported by Greener Journeys, 12th September 2011).
- 36 KPMG (2016), Analysis based on Balcombe et al (2004), quoted in Local Bus Market Study, report to the Department for Transport
- 37 Transport Focus (March 2016) Bus passengers have their say
- 38 Transport Focus (March 2016) Bus passengers have their say
- 39 Transport Focus (March 2016) Bus passengers have their say
- 40 <http://www.passengertransport.co.uk/2016/02/uber-is-biggest-threat-to-buses-says-tfl-chief/>
- 41 The Strategic Economic Plan (SEP) was adopted by the Leeds City Region Enterprise Partnership and WYCA in 2014.