

# Bus Improvement Study

City of York Council

Final Report

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This report has been prepared by Julian Ridge Transport Planning with the assistance of City of York Council. Whilst reasonable effort has been made to ensure that the information set out in this report is accurate, JRTP cannot be held responsible for any error in third party data.

## **Executive Summary**

*The York Bus Improvement Study was commissioned by City of York Council (CYC) in January 2012. The objective of the study has been to consider why bus patronage has not grown significantly in York between 2006 and the present, whilst it has grown in many other historic towns and cities.*

*The report has been centred around building an evidence base to prove or disprove a number of hypotheses about the bus network in York, which are:*

- *There are absolute problems with York's bus network;*
- *York's bus network is poor compared to other historic towns and cities;*
- *Some corridors in York are overbussed;*
- *There are opportunities to improve the viability of the bus network through better co-ordination of stage and park and ride services;*
- *There are opportunities to improve viability through better co-ordination of stage and home to school networks;*
- *The viability of the bus network is likely to decline in the medium term;*
- *It is not possible to deliver key political commitments on the bus network in York through the current partnership with operators; and*
- *A quality contract scheme (QCS) is the only practicable way for CYC to achieve its desired outcomes for the bus network.*

*Data collection took place through a number of means, including:*

- *A desk top exercise which considered how York's bus network performed in comparison to its peers;*
- *A TalkAbout panel questionnaire with a cross section of York residents;*
- *A series of on-bus surveys on routes across the York bus network;*
- *Discussions with interested parties, including Ward committees, Parish Councils and York Youth Council; and*
- *A desk-top exercise which considered benefits from multi-operator tickets in York.*

*This work was supplemented by a separate study of the York Quality Bus Partnership, which was led by the TAS Partnership and involved interviews with a wide range of stakeholders, including bus operators, CYC staff, the Cabinet Member for City Strategy and other interested parties.*

### **Comparing York to its peers**

*The exercise comparing York to its peers suggested that bus patronage growth in the city was about average in the comparison group. It was however significantly behind cities such as Brighton which are regarded as best practice exemplars. The exercise also suggested that York's bus fares were around the average for the comparators, but that service levels in the shoulders of the peaks were worse, with the "daytime" service level starting late in the day and finishing early in the evening. York was shown to have very low spend on supported bus*

*services once the premium contribution from the park and ride service was netted off CYC's spend on supported services, and relatively low even when park and ride's contribution was disregarded, implying that greater spend could remedy problems of poor services in some areas of the city and times of day.*

### **Talk About Panel Questionnaire**

*The TalkAbout panel questionnaire suggested that York appeared to be a fluid market for bus services, with a large proportion of people in the city using the bus, although many do so infrequently. This has the implication that most people in York must be familiar with the basics of the bus network – i.e. approximate service frequencies, destinations of routes, local bus stops and fare costs. Accordingly, the research suggests that the priority should be to get currently infrequent bus users to use the bus more often, rather than to induce bus use in people who are not currently users.*

### **On bus surveys**

*The on-bus surveys suggested that, whilst some operators in the city were delivering high levels of customer satisfaction, this was not a universal experience, and some operators in the city had services which were perceived as being of significantly below average quality. Particular sources of dissatisfaction were the high level of bus fares (implying either that people perceive bus fares as being high in an absolute sense – or that they regard them as poor value for money) and evening and Sunday bus services.*

### **Multi-operator tickets**

*The exercise which considered the benefits of a multi-operator ticket in York suggested that there are potentially very significant welfare benefits from reducing the price point of the current ticket.*

### **Partnership study**

*The TAS Partnership's work considered the governance of the existing Quality Bus Partnership in York and concluded that the group had been successful at managing a harmonious relationship between bus operators, CYC and other stakeholder groups. Partners on the whole seemed willing to continue to work within the partnership although the Council holds a greater aspiration for patronage growth than some of the operators in York. This report concludes that the partnership is indeed a good foundation for growing bus patronage in York, but that it needs substantial development if it is to achieve the aspirations for patronage growth which CYC now hold after a change of political administration.*

### **Change during the study**

*The period during which this study took place coincided with a number of substantial changes in the York bus network and external context. These were:*

- *The publication of a green paper "Green Light for Better Buses" by the Department for Transport in December 2011;*

- *The award of £3 million by the Department for Transport to York for the city's Better Bus Area Fund (BBAF) project (which in total is worth £5.8 million) in March 2012;*
- *The purchase of the stage operations of York Pullman by VeoliaTransdev in January 2012;*
- *The removal of the FTR vehicles from York by FirstGroup in April 2012 and their replacement with conventional double deckers;*
- *West Yorkshire PTE's decision to apply for Quality Contract (QCS) powers in June 2012; and*
- *Substantial network changes by FirstGroup (October 2012).*

*Where possible the implications of these changes have been considered in this report.*

### **Conclusions**

*The judgement about the study hypotheses is:*

<i>Hypothesis</i>	<i>Can it be supported?</i>	<i>Rationale</i>
<i>There are absolute problems with York's bus network</i>	<i>No</i>	<i>There is inconsistency in bus services across the city, but the excellent services from some operators suggest that there are no absolute barriers to offering a good service in York.</i>
<i>York's bus network is poor compared to other historic towns and cities</i>	<i>Partly</i>	<i>York's performance is average compared to its peers, but this does not match with CYC's desire for it to match best practice.</i>
<i>Some corridors in York are overbussed</i>	<i>Yes</i>	<i>There is one definitive case</i>
<i>There are opportunities to improve the viability of the bus network through better co-ordination of stage and park and ride services</i>	<i>Yes</i>	<i>It would appear that an integrated ticket at a lower price point could unlock significant benefits in York. It may also be possible to make operating cost savings, through integrating park and ride and "stage" services, but these would need a cost benefit assessment before they could proceed.</i>
<i>There are opportunities to improve viability through better co-ordination of stage and home to school networks</i>	<i>No</i>	<i>School routes are circuitous and do not match stage routes. There are few integration opportunities.</i>
<i>The viability of the bus network is likely to decline in the medium term</i>	<i>No</i>	<i>Significant committed investment in the bus network in York by CYC (e.g. BBAF) is likely to grow patronage in the medium term.</i>

<p><i>It is not possible to deliver key political commitments on the bus network in York through the current partnership with operators</i></p>	<p><i>Yes (it is not currently possible)</i></p>	<p><i>The current quality bus partnership has the foundations for delivering CYC's political commitments, but a restructuring of the partnership is needed to deliver change in future. This should include using BBAF monies to seed some work by the partnership – for example on marketing and promotion. It is concluded that the partnership has a key role in delivering the Better Bus project.</i></p>
<p><i>A quality contract scheme (QCS) is the only practicable way for CYC to achieve its desired outcomes for the bus network</i></p>	<p><i>Perhaps</i></p>	<p><i>Delivering CYC's aspirations through the existing partnership (even once relaunched) is likely to be challenging. This report does not rule out use of a QCS in future if sufficient change cannot be delivered through partnership.</i></p>

### **Recommendations**

The key recommendations of the study are that:

- CYC must devise a **Bus Strategy** to clearly set out its priorities for bus services in York. This should be developed in consultation with the operators and other stakeholders;
- The existing **Quality Bus Partnership** should be **strengthened and relaunched**, and supported by staff with clear accountability to the partnership;
- A bus **network review** should be undertaken to identify areas of York with poor bus services and options for providing better services in future;
- Whilst a continuation of the existing Quality Bus Partnership in York should be used to deliver improvements on the York bus network in the short term, there is a risk that a partnership may not be an effective delivery mechanism with a fragmented bus network, such as that which exists in York, so **CYC should continue monitor progress and build knowledge about Quality Contracts** so it could apply for Quality Contract powers if progress via the Partnership does not meet the aspirations set out in the Bus Strategy.

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## 1 Introduction

- 1.1 With a growing population<sup>1</sup> and extensive redevelopment<sup>2</sup> taking place, York exhibits many of the characteristics of a city where bus use should be growing<sup>3</sup>.
- 1.2 However, latterly bus patronage growth in the city appears to be flat<sup>4</sup>, with growth between 2001 and 2006 being replaced by a lack of a consistent growth trend more recently, in contrast to other historic towns and cities (for example, Brighton and Cambridge), where bus use appears to be growing year on year.
- 1.3 The Bus Improvement Study, which this document presents, was commissioned by City of York Council (CYC) in January 2012 to consider the reasons for the apparent stagnation in the city's bus patronage and to propose a way forward to ensure that the City of York Council's aspirations for bus services can be delivered through an appropriate policy and regulatory framework which would allow CYC to replicate the success seen in towns and cities which are recognised as best practice.

### *Scope of this report*

- 1.4 The study's terms of reference were set at CYC's Cabinet Member decision session in January 2012. In accordance with them, the study examines the current bus service provision in the city, in terms of:
- The local 'stage carriage' network of services operating entirely within the Council's boundary;
  - The park and ride service;
  - Longer distance bus services either linking York with rural areas or other towns/cities such as Malton, Selby, Easingwold and Leeds; and
  - Other aspects of the "wider" bus network, including city centre tour buses, home to school transport using buses and Dial & Ride (Community) transport, where these are relevant to the study.
- 1.5 The study does not make recommendations about scheduled coach services, coaches operating excursions to York, rail replacement services or taxi/ private hire services.

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<sup>1</sup> 10% growth between 2001 and 2011, Centre for Cities, City Outlook 2011

<sup>2</sup> For example, the expansion of the University Science Park, increasing development at the Designer Outlet and Monks Cross sites.

<sup>3</sup> See TAS Consultancy cycle of bus growth (See figure 2.6)

<sup>4</sup> See Section 2



## *Methodology*

1.6 The study considered a series of hypotheses, which were agreed at the Cabinet Member decision meeting in January (see Appendix D), and whether they could be supported by data and evidence collected in the city. Research was through a number of data collection exercises, which are summarised in this report.

1.7 The hypotheses which the report seeks to examine are that:

- “There are absolute problems with York’s bus network;
- York’s bus network is poor compared to other historic towns and cities;
- Some corridors in York are overbussed;
- There are opportunities to improve the viability of the bus network through better co-ordination of stage and park and ride services;
- There are opportunities to improve viability through better co-ordination of stage and home to school networks;
- The viability of the bus network is likely to decline in the medium term;
- It is not possible to deliver key political commitments on the bus network in York through the current partnership with operators; and
- A quality contract scheme (QCS) is the only practicable way for CYC to achieve its desired outcomes for the bus network.”

## *Structure of this report*

1.8 The hypotheses are considered in detail in Section 7 of the report.

1.9 This report is structured around the evidence collected to examine the hypotheses set out above. As such:

- Chapter two presents the context and policy background for bus services in York;
- Chapter three contains a benchmarking report where the bus network in York is compared to other towns and cities with similar characteristics;
- Chapter four sets out the results of surveys of York residents and bus users;
- Chapter five sets out an exercise which considers whether it is possible to make savings or passenger improvements from reconfiguring services on key corridors in York;
- Chapter six reports a study into how the existing York Quality Bus Partnership can be developed, the work in this section being largely undertaken by the TAS Consultancy, a specialist public transport consultancy who were specifically tasked with taking an independent view of how the partnership currently operates and how it might do so in future;
- Chapter seven assesses whether the hypotheses which the study is considering can be supported by the evidence which has been collected; and
- Chapter eight recommends a way forward and presents an action plan for the next two years.

1.10 The report has four appendices:

- Appendix A: a full breakdown of the TalkAbout questionnaire for York residents;
- Appendix B: copies of the forms used to collect data from bus users;
- Appendix C: worked examples of service integration;
- Appendix D: Cabinet Member Decision Session report, January 2012.

### *Status*

1.11 This report has benefited from input by various CYC members of staff and John Carr, as independent Chair of the QBC. The conclusions and recommendations for the report are, however, those of JRTP, and do not form CYC policy unless the CYC chooses to adopt them.

### *Version control*

1.12 This is the final version of this document.

## 2 Policy Background in York

### *Introduction*

2.1 In this section the context for the bus network in York is considered, alongside current policy contexts and initiatives, as set out in the:

- Council's third local transport plan<sup>5</sup>,
- other Council documents, such as
  - the Local Development Framework's Movement and Accessibility Framework<sup>6</sup>,
  - current Council Plan<sup>7</sup>,
  - York New City Beautiful<sup>8</sup>,
- various economic development documents and
- the Council's recent successful funding bids for:
  - Access York<sup>9</sup>,
  - Intelligent Travel York<sup>10</sup> and
  - "Get on Board York" (Better Bus Area Fund)<sup>11</sup>.

2.2 The section is deliberately brief and intended to be a distillation of the key points from each policy document. The reader is referred to the documents themselves should they require greater detail. All documents are publically available, with web domains given in the footnotes at the bottom of this page.

### *Context*

2.3 With a historically constrained road network and environmentally sensitive city centre<sup>12</sup> York has been ahead of the curve in developing sustainable transport in the UK. The city was pioneering in its development of a "transport user hierarchy" which places the needs of pedestrians, mobility impaired people, cyclists and public transport users ahead of those travelling by car (Figure 2.1).

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<sup>5</sup> [www.york.gov.uk/transport/ltp/ltp3/](http://www.york.gov.uk/transport/ltp/ltp3/)

<sup>6</sup> [www.york.gov.uk/environment/Planning/ldf/](http://www.york.gov.uk/environment/Planning/ldf/)

<sup>7</sup> [www.york.gov.uk/council/plan/](http://www.york.gov.uk/council/plan/)

<sup>8</sup> [www.york.gov.uk/environment/Planning/ldf/evidencebase/YorkNewCityBeautiful](http://www.york.gov.uk/environment/Planning/ldf/evidencebase/YorkNewCityBeautiful)

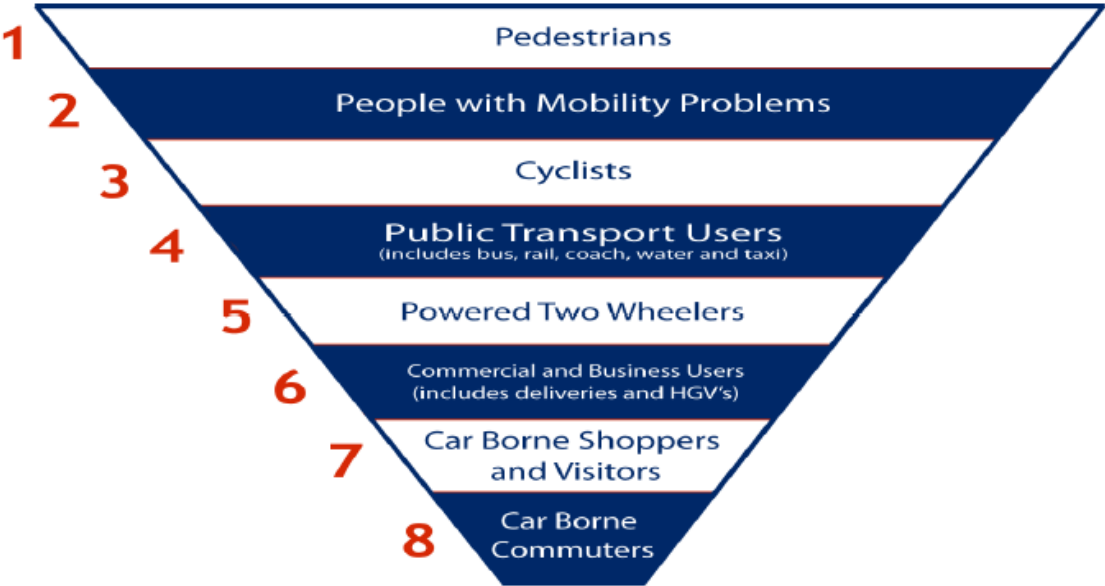
<sup>9</sup> [www.york.gov.uk/transport/Parking/Park and Ride/new/accessyork/](http://www.york.gov.uk/transport/Parking/Park_and_Ride/new/accessyork/)

<sup>10</sup> [www.york.gov.uk/transport/lstf/](http://www.york.gov.uk/transport/lstf/)

<sup>11</sup> [www.york.gov.uk/transport/Public\\_transport/buses/Better\\_Bus\\_Area\\_Fund/](http://www.york.gov.uk/transport/Public_transport/buses/Better_Bus_Area_Fund/)

<sup>12</sup> 94% of which is in a conservation zone; all of which is covered by a low emission zone.

Figure 2.1: Transport User Hierarchy (LTP3, 2011)



\* Note: Pedestrians with mobility problems are given the highest priority

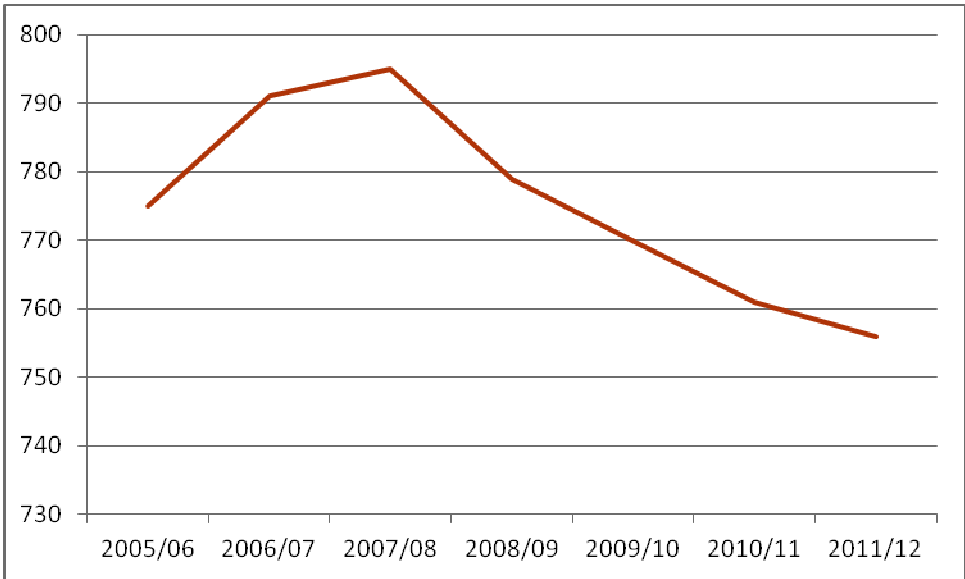
- 2.4 York was also a pioneer of “park and ride” with the first site in the city developed in 1990, the City’s local authorities<sup>13</sup> were early to see the potential of cycling<sup>14</sup> as a means to reduce car use in the city, and early adopters of pedestrianisation and selective road closure to improve the amenity of the city centre. The city has also been active in following policies to restrain car use more actively in the city centre, through relatively high parking charges, especially for long stay parking, and extensive residents’ parking controls. These policies have had a significant impact upon car use in the city, so that a year on year reduction in car journeys can be observed (Figure 2.2). Cycle use (Figure 2.3) can be seen to increase over the same period, although bus use is broadly static, without showing a consistent trend either upwards or downwards (Figure 2.4).
- 2.5 Within the city, air quality is a problem. All of York City Centre is designated as an Air Quality Management Area, with nitrogen dioxide and particulate pollution particular problems. Many of the areas of York with the highest levels of air pollution are at key nodal points on the bus network (for example, Rougier Street and Exhibition Square) and the large number of diesel powered buses in these areas is a key contributory factor to their relatively poor air quality.
- 2.6 City of York Council have an obligation to meet the targets in the Climate Change Act (2008) and have chosen to go beyond these in some key areas, particularly relating to the Council’s own activities. The city is shortly to be designated as a low emissions zone with a low emissions strategy. A key part of this strategy is assisting bus operators to adopt vehicles with the lowest emissions for their routes in York. The low emissions vehicles would replace the relatively large number of EuroII and EuroIII vehicles currently in use.

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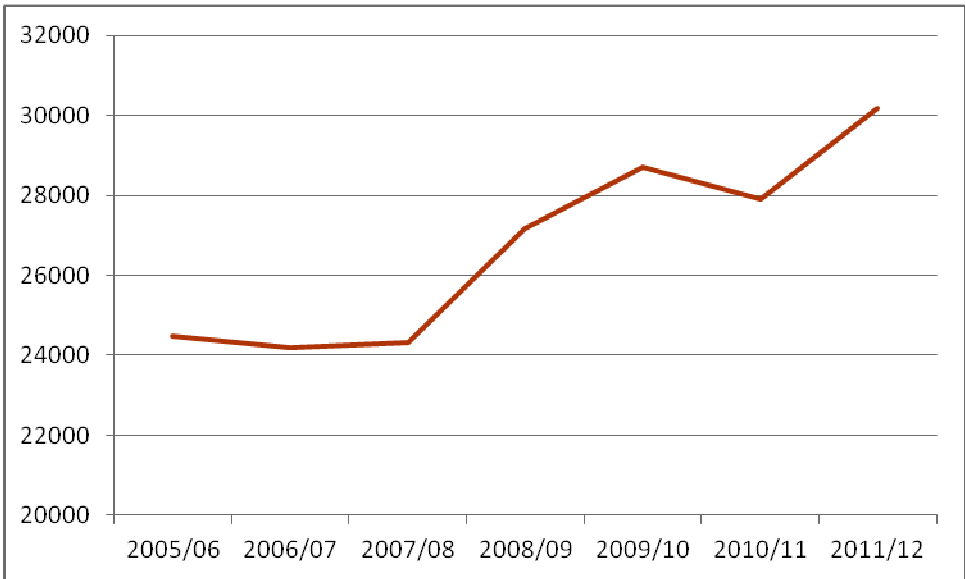
<sup>13</sup> York District Council and North Yorkshire County Council until 1996, City of York Unitary Council thereafter

<sup>14</sup> Jamieson, Mackay and Partners, Greater York Travel Study, the Medium Term Plan, 1978

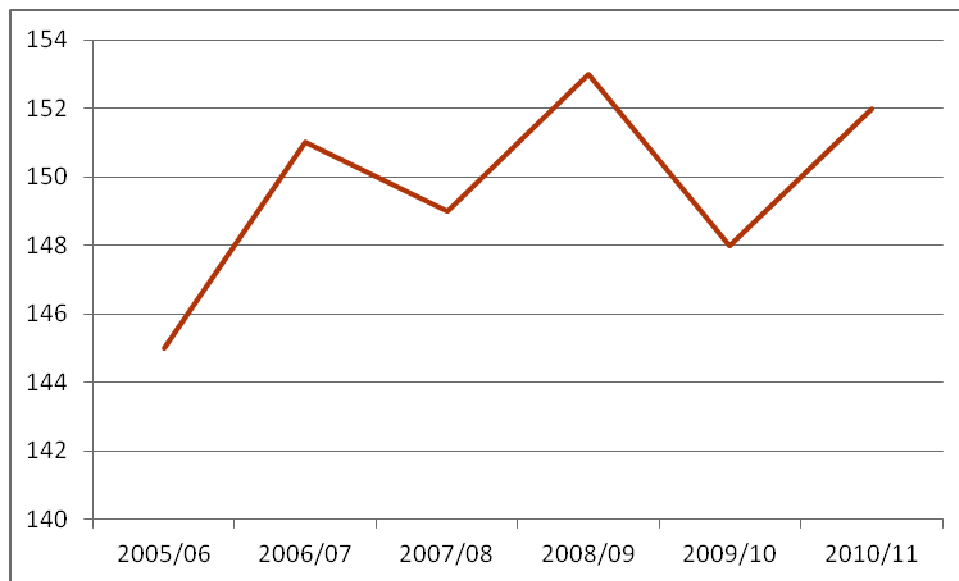
**Figure 2.2: Car Use in York (millions of journeys pa)**



**Figure 2.3: Cycle Use in York (12 hour count at 29 sites)**



**Figure 2.4: Bus Use in York (millions of trips pa)**



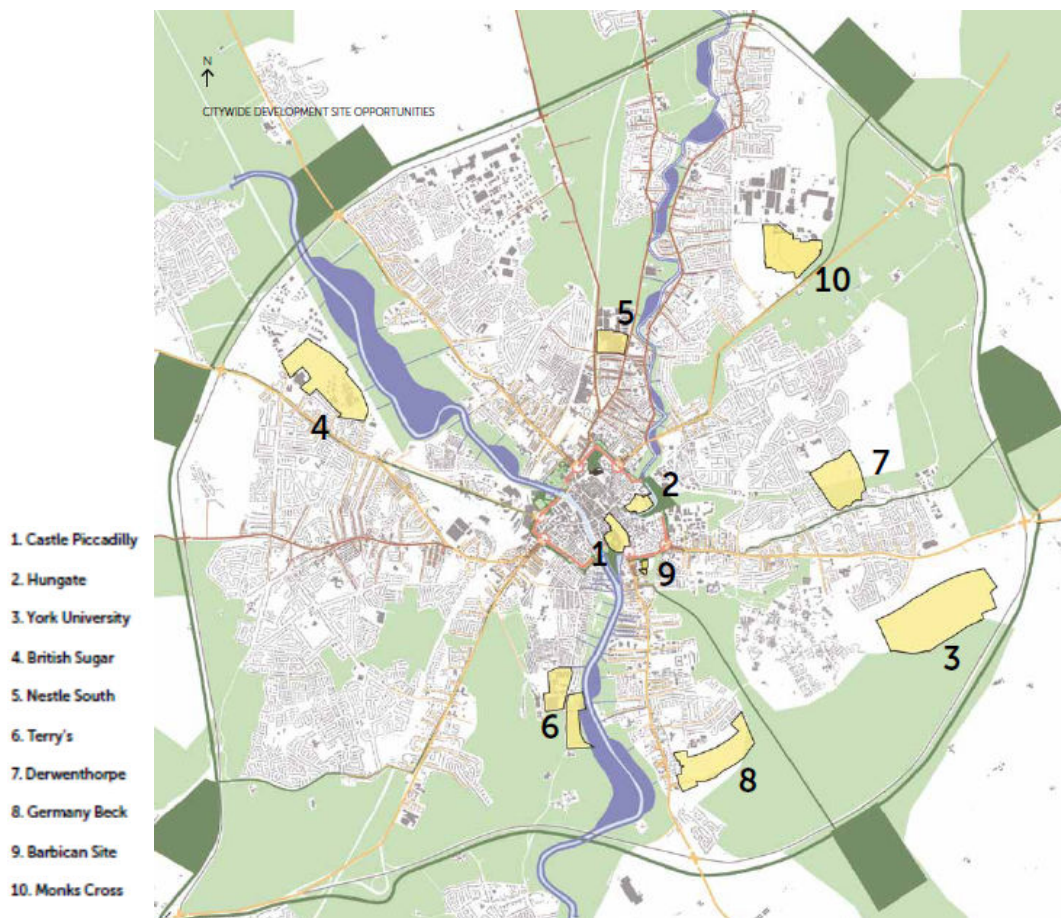
2.7 Although transport policy in York places a high value on public transport as a means to travel around York, the city's historic road layout throws up a number of challenges to bus operation. York is unusual for a city of its size in two respects: it has no central bus station to act as a single point for interchange between services, and as a location where bus operators can layover vehicles, change drivers etc; and bus services skirt the retail core of the city, rather than penetrating it as they do in many other towns and cities of York's size – for example in Exeter.

2.8 More recent context for the bus network includes a background of strong local population growth in York, with the population of the city increasing by 10% between 2001 and 2011<sup>15</sup>. The city is also one of the UK's six science cities, with development of a new science park at York University. Other large scale developments in the city are at Monks Cross (mixed stadium and retail development), the British Sugar site on Boroughbridge Road, the Terry's site on Bishopthorpe Road and the York Central site adjacent to the rail station. Other potential development sites include Castle-Piccadilly, Hungate, Nestle South and Germany Beck (see Figure 2.5).

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<sup>15</sup> Centre for Cities, Cities Outlook 2011

**Figure 2.5: Development Sites (York New City Beautiful, 2010)**



Accordingly, York should be exhibiting many of the characteristics of a city where bus use should be growing (see Figure 2.6 and the example of Cambridge below<sup>16</sup>). However as we saw in Figure 2.4, bus use appears to be stagnating in the city without developing a clear upward trend.

#### Cambridge Citibus

The Cambridge Citibus network was introduced in 2001 and consisted of a simplification of the Cambridge urban bus network, supported by rebranding, telemarketing and advertising on television. Patronage increased by 65% in response to these measures.

<sup>16</sup> <http://www.dft.gov.uk/publications/role-of-soft-factors-in-the-bus-market-in-england>





- **Encouraging behavioural change** to maximise the use of walking, cycling and public transport and continue improving road safety;
- **Tackling transport emissions** to reduce the release of pollutants harmful to health and the environment;
- **Enhancing public streets and spaces** to improve the quality of life, minimise the impact of motorised traffic and encourage economic, social and cultural activity.

2.11 Table 2.1 sets out the outcomes which the LTP plans to achieve for each theme:

**Table 2.1: Themes and Outcomes**

Theme	Key outcome (red text = direct link to bus network, green text = indirect link)
Quality alternatives	Comprehensive cycling and walking network
	<b>Better quality and more reliable public transport</b>
	<b>Enhanced park and ride facilities</b>
Strategic links	<b>Well maintained and managed strategic transport network</b>
	New cycling and walking links between residential (urban and rural) and employment areas
	<b>Better rail services and connections</b>
	Selective enhancements to the existing road network to increase capacity and improve safety
Behavioural change	<b>Greater awareness of options available for sustainable modes of travel (travel planning)</b>
	<b>Increased levels of sustainable travel to all key education, employment, leisure and retail destinations</b>
	Improved road safety awareness
	<b>People being more healthy and active</b>
Transport emissions	<b>Reduced vehicle emissions</b>
	<b>Improved air quality</b>
Public streets and spaces	Enhanced and safer walking and cycling access in public spaces, streets and developments
	<b>Fewer vehicles travelling through and around the city centre</b>
	<b>Safer roads with fewer casualties</b>
	<b>Developments integrated into and enhancing the sustainable</b>

	<b>transport network</b>
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2.12 The LTP includes a number of specific bus-network actions, including:

- Increasing the number of park and ride sites to seven and the number of parking spaces to 5,350;
- Associated junction improvements and bus priority measures for park and ride services;
- Improving public transport reliability, integration and attractiveness;
- More accessible public transport information; and
- Better value fares and more ticketing products.

2.13 Bus-specific targets in the LTP are (all for the period between 2009/10 and 2014/15):

- Improve bus service punctuality (infrequent services from 68% of arrivals “on time” to 78%, and for frequent services<sup>17</sup> to reduce excess waiting time from 1 min 58 secs to 1 min 25 secs);
- A target to increase bus patronage by 2% (from 14,774,800 journeys per year to 15,070,300). This figure includes an increase in park and ride users from 2,801,000 pa to 3,000,000 (a 7% increase);
- A target to increase the number of accessible buses operating in the city from 94% of the fleet to 96% of the fleet;
- Increase the number of households in York with public transport access to health, education, leisure and retail sites by 3%;
- Increase the proportion of the bus fleet which meets EuroIII standards from 68% to 100%;
- Various measures to improve facilities at bus stops.

### *Other planning documents*

2.14 The LTP recognises that it is itself informed by a number of other policy streams, including development of York’s Local Development Framework and associated documents such as York New City Beautiful: Towards an Economic Vision (Professor Alan J Simpson and panel), which sets out a series of measures to improve the urban realm of the city through, for example:

- Better integration of the natural and built environment (e.g. through enhancements to gateways to the city and the area around the city’s walls and the rivers);
- Improvements to the environment of the city’s streets;
- Greater attention to green spaces in the city; and
- Development of a “Great Street” between the Railway Station, Minster and Walmgate Bar.

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<sup>17</sup> One bus per 10 minutes or more frequent

- 2.15 The “Movement and Access Framework”<sup>18</sup> sought to develop the proposals set out in York New City Beautiful into a proposed transport strategy. Features of the strategy included:
- Retention of the current general routes for buses around the city centre, but with some detailed changes around Coppergate;
  - Improvements to passenger facilities around the station (although it is stressed that this would not be a conversion to a central bus station);
  - Improvements to passenger facilities at Stonebow.
- 2.16 In the medium/ longer term the document suggested that the Council should consider:
- Adoption of low/ no emission buses for use in the city;
  - Reducing the number of articulated buses in the city and replacing them with vehicles which are more “in scale” with the city’s street widths and urban fabric;
  - The potential for a bus station south of York Rail Station, in the area which is currently covered by Queen Street flyover.

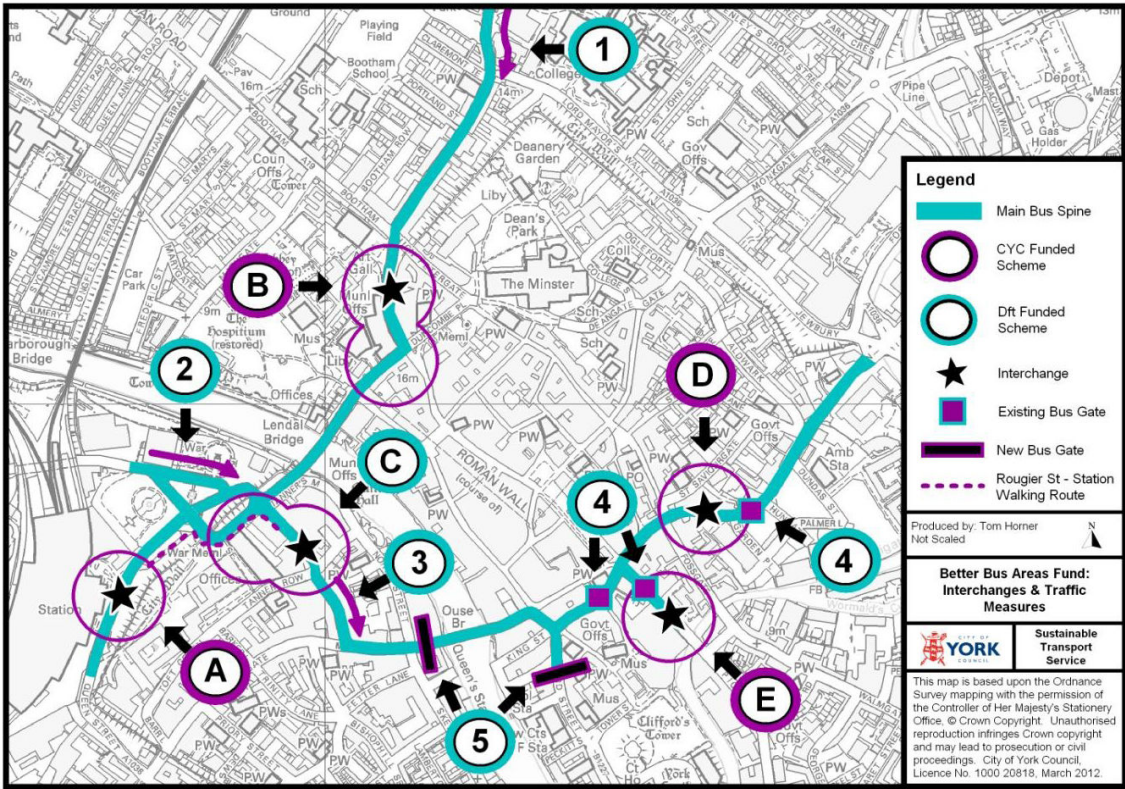
### *Funding Bids*

- 2.17 Subsequent to the completion of the “Movement and Access Framework” the Council has been successful in attracting significant funding for developing the city’s sustainable transport network, and bus services in particular, through:
- Access York – a Major Schemes Business Case which provides funds of £15.3m for a new park and ride site on the A59 near Poppleton and a redevelopment of the Askham Bar park and ride site on Tadcaster Road;
  - The Intelligent York LSTF bid, which attracted £7million (£4.6m from the Department for Transport) for a range of measures to support sustainable travel in the northern quadrant of the city;
  - “Get on Board York” a bid to the Better Bus Areas Fund which attracted £2.9m of central government funding (alongside £1.6m of match funding) to deliver a range of improvements to the bus network, particularly measures to improve reliability (new stretches of bus lane and bus gates in the city centre), five new interchange points (at Rougier Street, the Rail Station, Stonebow, Piccadilly and St Leonard’s Place/ Museum Street/ Exhibition Square (see figure 2.7/ table 2.2)) and a range of supporting marketing/ promotion measures. The bid also included a joint bid with Metro to deliver smartcard ticketing. The bid forecasts an 18% increase in bus trips in York as a result of the proposed measures.

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<sup>18</sup> Movement and Access Framework and evidence base, JMP, 2011 (unpublished)

Figure 2.7: Get on Board York measures (for delivery 2012-2014)



<b>Reliability package</b>		
1. Bus Lane and associated traffic light priority measures – York Hospital to city link	150 metres of new bus lane on Clarence Street, changes to traffic light signals.	Positive impact on 18 buses per hour during the day.
2. Bus Lane and associated traffic light priority measures – Leeman Rd link	New bus contra flow lane.	Positive impact on 13 buses per hour during the day.
3. Bus Lane and associated traffic light priority measures – City central interchange link	Section of 'bus only' road on George Hudson Street.	Positive impact on 96 buses per hour during the day.
4. Improvements to existing city centre bus priority area (including CCTV enforcement)	CCTV cameras and number plate recognition software to enforce banned traffic movements.	Positive impact on 65 buses per hour during the day.
5. Extension to city centre bus priority area (including CCTV enforcement)	CCTV cameras and number plate recognition software to enforce banned traffic movements and associated traffic modeling of the proposal.	Positive impact on 89 buses per hour during the day.
<b>Passenger Facilities Package</b>		
A. York Rail Station interchange	Bespoke, architect designed interchange hub with new signage and pedestrian provision.	Benefits approximately 675k boarding passengers per year. Funded by City of York Council (CYC).
B. Theatre Royal Interchange	Bespoke, architect designed interchange hub.	Benefits approximately 950k boarding passengers per year. Funded by CYC.
C. City Central Interchange	Interchange hub for city.	Benefits approximately 1,300k boarding passengers per year.
D. Stonebow Interchange	Improved interchange hub.	Benefits approximately 875k boarding passengers per year. Funded by CYC.
E. Piccadilly Interchange	Improved interchange hub.	Benefits approximately 775k boarding passengers per year. Funded by CYC.
F. District centre & key employment site – improvements to passenger facilities	Improvements to stops and shelters across city.	Out of city centre locations, not shown on map.



Promotional Package	Outputs	Impact/ notes
1. Delivery of commercial smart ticketing products, sales infrastructure and back office functionality	Smart ticket which can be used on all services in York. Back office services.	City wide impact. Greater detail in Metro's BBAF application.
2. Marketing and promotion of smart ticketing products	General promotion. Distributing 10,000 smartcards to users to encourage down stream card use.	City wide impact though cards may be targeted at particular locations with high car use.
3. 'Get on Board York' marketing campaign	Development of a city-wide York bus brand, billboard advertising, telemarketing, promotion of multi-operator tickets and ticketing products for young people. Development of new bus service information protocols.	City wide impact. Research demonstrates that effective marketing can deliver a higher return on investment than physical measures (TAS 1998, cited in soft factors report).
4. Web portal	Personalised public transport web portal providing user travel preferences (e.g. stops used on frequent journeys, real time travel information, delays/diversions information, travel promotions).	City wide impact. Will enable targeted marketing campaigns based on users' travel behaviour, expressed preferences or socio-economic circumstances (assessed through a feedback questionnaire).
5. Real Time Passenger Information displays at every City Centre bus stop	Real time displays at 55 stops in the city centre with audio component for partially sighted people.	Impact at all stops in the city centre giving potential city wide impact.
6. 'In shelter' CCTV at bus interchange points	5 sets of cameras monitoring the enclosed areas of the interchange hubs.	Supplements existing CCTV street monitoring.
7. Customer interaction, smooth driving techniques and bike awareness	Training for all 350 bus drivers in York in customer interaction, smooth driving techniques and bike awareness.	City wide impact. Soft factors research suggests a high passenger willingness to pay associated with measure.
8. 'Get on Board York' targeted 'new passenger' engagement for retail and employment sites	Targeted marketing at locations in the city with high car use or which are experiencing significant churn in travel habits (e.g. new or growing developments).	Sites already identified include York District Hospital, University of York, two retail parks on the edge of the city and brownfield redevelopments close to the city centre.
9. Bus information outlet at York Rail Station	Manned bus services information kiosk at York Rail Station.	Will assist visitors to York in using the bus network when they arrive at the station.

10. Control room and on-street staff managing obstructions and delays to bus services in the city centre	One member of staff to monitor and manage bus movements in the city centre, 2 on-street staff.	Positive impact on all bus movements through the city centre.
11. 'Get on Board York' programme management	Manager for the programme to take ownership and deliver the outputs alongside York Quality Bus Partnership (QBP).	

2.18 Through “Access York”, “Intelligent Travel York” and “Get on Board York”, CYC has received substantial government funding to deliver its aspirational target for bus patronage and in the York Quality Bus Partnership (QBP) provides a delivery vehicle engaging bus operators in implementation.

*Council Plan*

2.19 The Council has also published its own council plan “Delivering for the People of York 2011-2015”, which recognises that transport is one of the Council’s key corporate policies. The “Get York Moving” section of the plan sets out a number of transport priorities, including a specific objective to improve York’s bus services, through partnership arrangements with bus operators. The plan sets an aspirational target for a 10% increase in bus based trips between 2011 and 2014, which is considerably above the 2% patronage increase target set out in the LTP, but, unlike the LTP target, is not a statutory target, backed by a statutory consultation process.

*Conclusion on context and policy in York*

2.20 Overall, we can conclude that the transport network of York, and the bus network as a part of that network, has three significant contextual influences:

- An economic growth context which sees the city’s size, population and economic importance increasing, but always with the potential for an associated growth in city centre traffic levels to erode the high amenity levels which make York an attractive place to live, work and visit;
- York’s historic and sensitive urban fabric, which places constraints on traffic movements in the city centre, including placing limitations on bus operations there, particularly passenger facilities, interchange points and layover/ driver change facilities; and
- A local authority that recognises that there is a tension between economic growth and the limitations which the city centre imposes on traffic movements, and who have sought to follow sustainable transport policies over many years to manage the situation. Although these policies should be leading to growth in bus passenger numbers in York, the actual patronage trend over the last five years has been broadly flat.



- 2.21 As such, the city's LTP sets out how the city will manage its transport network. The bus is key to achieving many of the outcomes the city wish to achieve, but the LTP's patronage target is relatively modest (and has already been achieved between 2009/10 and 2011/12<sup>19</sup>). The patronage targets set out in the Council Plan (10% growth in the four years between 2011/12 and 2014/15) and Get on Board York (18% growth between 2012/13 and 2014/14) are more ambitious. However, unlike the LTP target they do not have statutory status, backed by a consultative process. It could therefore be concluded that the statutory target has been left behind by subsequent political and opportunity-driven changes to the policy framework for bus services in York, and that a non-statutory policy framework has stepped in to fill the gap, which now needs to receive statutory backing.
- 2.22 Also, despite the large volume of material about bus services which has been produced, including in the LTP, it is difficult to crystallise from the documents clearly what the Council's expectations are of bus operators in the delivery of the plans and targets it sets out. For example, although the LTP sets out a reliability target, it is not clear (in the document) what the current causes of unreliable running are on the bus network, and who is responsible for improving matters (for example, should it be the Council through improving highways infrastructure, or is the principal cause poor management of vehicle headways by the bus operators, staff absence etc?). Likewise, although the LTP contains targets for making the bus fleet more accessible and less polluting, it is not clear whether this would be delivered through natural wastage/turnover in the bus fleet or whether it requires accelerated fleet replacement by operators – or whether the local authority is proposing to intervene through a mechanism such as the Green Buses Fund.
- 2.23 It is notable that there is no mention of York's "Quality Bus Partnership" (QBP) throughout the main LTP document even though it is the main delivery mechanism for improvements to the bus network. This should be compared with, for example, the much more specific programme presented in West Yorkshire ITA's LTP under the "New Approach to Buses" heading. Unlike the ITA, which has rather greater resources with which to intervene to achieve integrated transport solutions, CYC is currently dependent on operator goodwill for the implementation of many of its transport policies. This is not necessarily a handicap provided that there are shared objectives and willingness for all parties to work together in the QBP.

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<sup>19</sup> The DfT's statistics suggest that 15,200,000 passengers were carried in York in 2010/11, against the LTPs' 2014/15 target of 15,070,300. See chapter 3.

2.24 It should be remembered that the LTP, and to a lesser extent York New City Beautiful and the Movement and Accessibility Framework were developed during a relatively short period of extreme uncertainty about local government funding – and within that context CYC has rightly taken a cautious approach of specifying measures it can be confident of delivering. However, CYC's significant success at attracting funds post LTP submission through Access York, Intelligent Travel York and Get on Board York changes this dynamic. As a result of the new funds, CYC is now in a position to fund substantive improvements to the bus network in the city. This is a great opportunity for CYC to restate bus policy, in particular:

- Its patronage target for bus services;
- Its expectations of bus operators;
- the part bus operators must play in delivering the patronage target;
- Its expectations of the quality bus partnership (QBP) in the city;
- a vision of how the QBP will help in delivering the outcomes the council wish to see from bus services; and
- The short, medium and long term measures which CYC wish to progress to improve the bus network.

### 3 How does York's bus network compare with other towns and cities?

#### *Introduction*

3.1 This section of the report benchmarks the performance of York's bus network in comparison to the bus networks in other, similar, towns and cities. Sources for the information are given in footnotes throughout the document.

3.2 The document considers the following aspects of the York bus network:

- Patronage trends;
- Customer satisfaction;
- Fare levels;
- Market structure;
- Network reach; and
- Supported services.

#### *Choice of comparator towns and cities*

3.3 Bus services are particularly influenced by local circumstances. In comparing some elements of bus services (e.g. bus patronage or passenger satisfaction), the task is made more difficult because information is only compiled on a common basis for Local Transport Authorities (i.e. it excludes Metropolitan District and second tier authorities), which therefore excludes a number of towns and cities governed by second tier authorities which intuitively share characteristics with York (for example, Cambridge, Oxford, Canterbury, Exeter<sup>20</sup> etc) and against which effective comparisons could be made.

3.4 The approach taken in this paper has been to benchmark York:

- Against similar urban areas for attributes where data is available for urban areas (irrespective of whether they are local transport authorities);
- Against similar unitary authorities where information is only available for LTAs.

3.5 In both cases, "similar" is defined as:

- Either relatively near to York (Darlington, East Riding, Hull)
- with a strong local economy, comparable to York's (Peterborough, South Gloucs) and/ or
- a large tourism component to the local economy (Blackpool, Bath, Brighton)

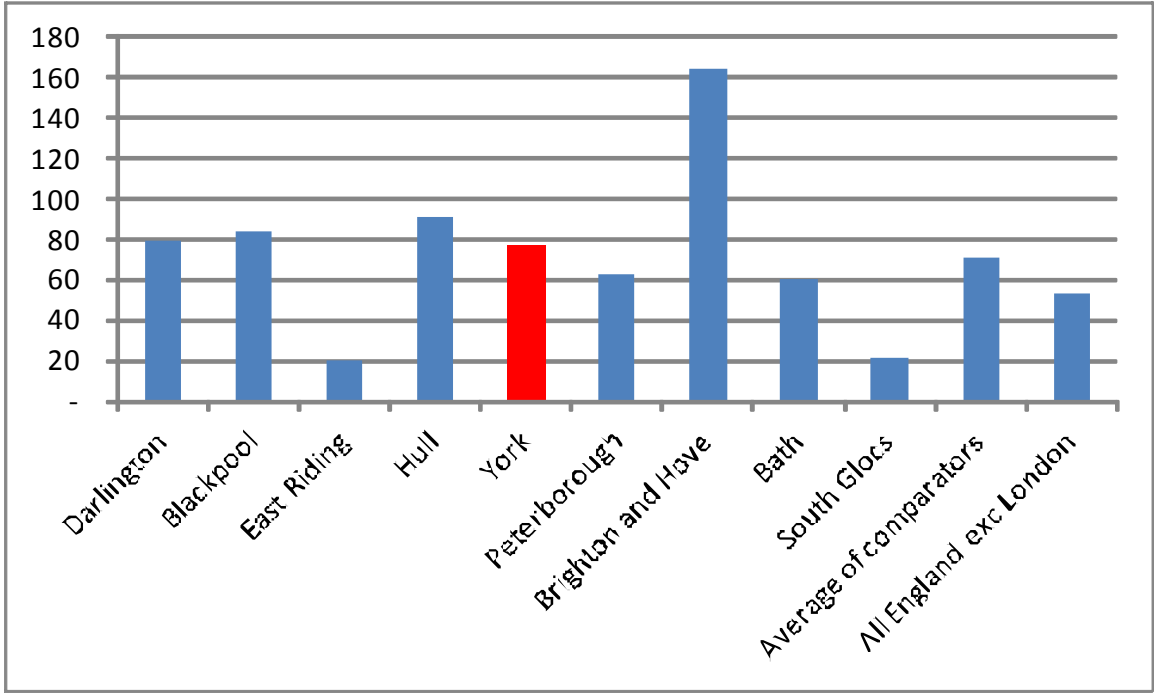
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<sup>20</sup> Bus patronage data for these cities is reported within totals for the counties in which they sit in – so, for example, change in patronage in Cambridge is swamped by patronage change in Cambridgeshire. Totals for bus operators also cover large and dispersed geographical areas, and also include some transfer of passengers between operators through either organic growth or growth by acquisition – hence they are not reliable and robust for the purposes of making comparisons here.

*Demand for the network: Patronage Trends*

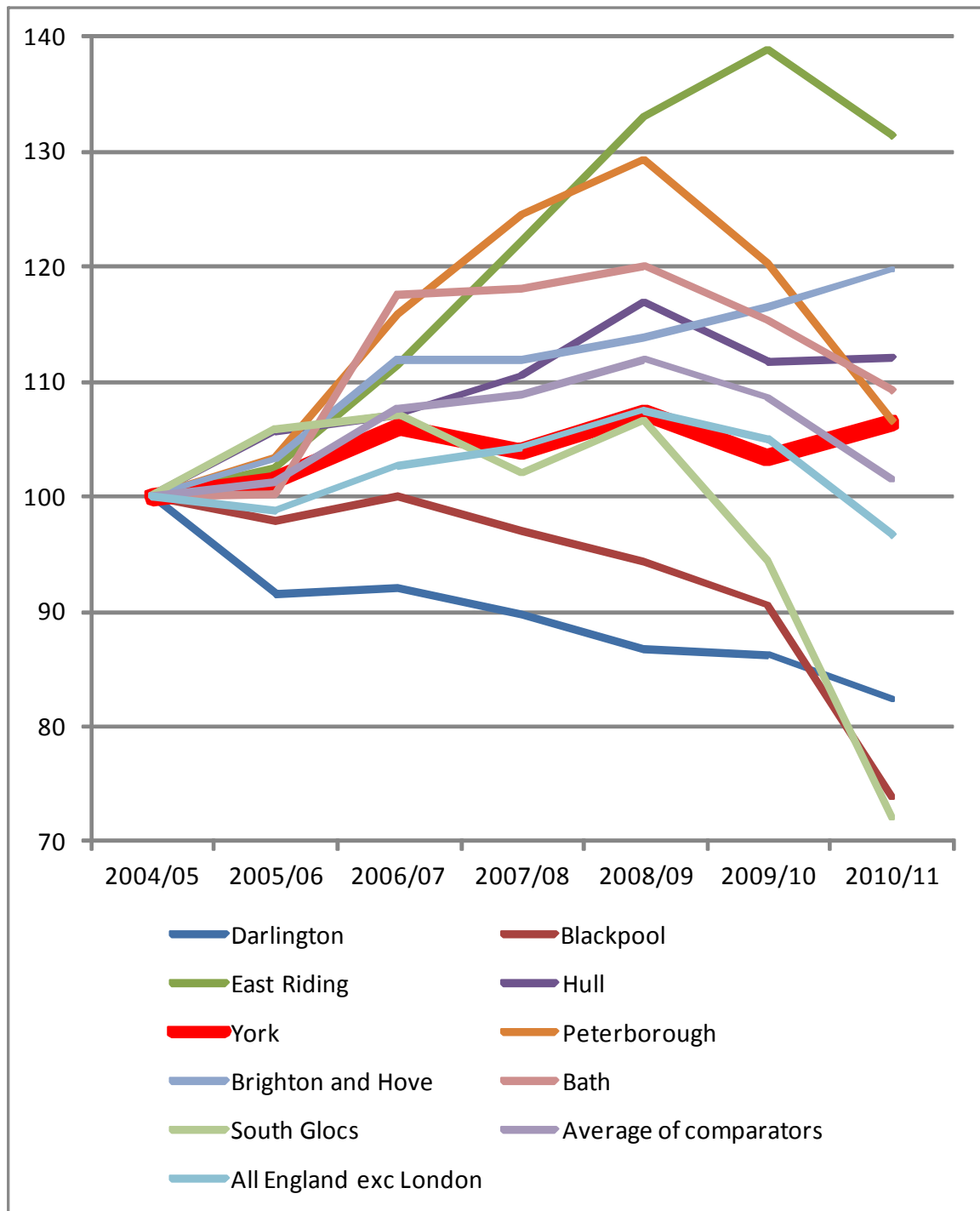
3.6 The patronage trend in an authority indicates the success of local bus companies and the authority working to grow bus patronage. Whilst patronage is decided partly by demographics and geography of an area, it can also be increased through improvement in the bus service making it more attractive for people to use the bus. Chart 3.1 shows bus trips per head of population in York and the comparator authorities in 2010/11. Chart 3.2 shows a patronage index from 2004/05 to 2010/11<sup>21</sup>.

**Figure 3.1: Bus Trips per head in York and Comparators, 2010/11**



<sup>21</sup> Data from DfT Public Transport Statistics 2010/11 and 2009/10

Figure 3.2: Bus Patronage Index 2004/05 – 2010/11 (2004/05 = 100)



3.7 As can be seen, York’s bus trip rate is slightly above the average of the comparators, but is about 40% higher than the “England without London” average. Of the more urban comparator authorities, York has more trips per head than Peterborough and Bath, but fewer than Blackpool, Hull and Darlington. York has significantly fewer trips per head than Brighton, which is generally acknowledged to be a best practice exemplar for bus services.

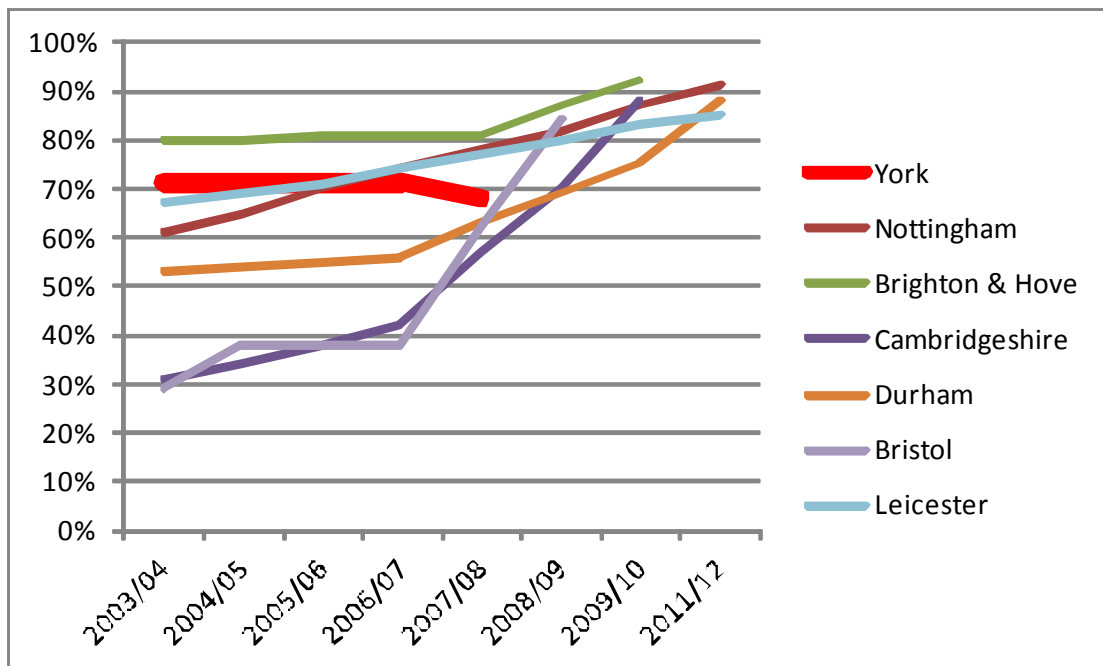
3.8 In terms of the patronage trend, York’s patronage is broadly flat, with growth very similar to the “England excluding London” trend. It is, however, below the average for the comparator authorities. Unlike several authorities (Blackpool, South Glocs and Peterborough), patronage in York has stayed broadly stable post-recession and has not suffered large scale decline, although unlike authorities such as Brighton, it has not seen a consistent increase either. It can also be seen that patronage in York increases slightly between 2009/10 and 2010/11. The increase is sufficient to meet the LTP target for 2014/15, suggesting a strong likelihood that the LTP target will be exceeded substantially once the AccessYork and Better Buses projects are complete.

3.9 **Conclusion:** Bus patronage in York:

- Is in the middle of patronage trends for similar unitary authorities, but is some way below both the patronage growth trend and number of bus trips per head seen in other authorities which are thought to be best practice exemplars (e.g. Brighton);
- Has already met the LTP patronage target which the Council has set for it to meet by 2014/15 (2% patronage growth between 2009/10 and 2014/15);
- Is challenged to meet more recent patronage growth targets, as set out in the Council Plan and Better Bus Area Fund, although in both cases it is early in the day to assess success or otherwise.

*Customer Satisfaction*

**Figure 3.3: Customer Satisfaction with bus services<sup>22</sup>**



<sup>22</sup> Nb data does not exist for all years for all authorities – trend values have been used where intermediate data points are missing.

- 3.10 Bus user satisfaction ratings are collected for authorities in England, initially collated by the DfT as a national indicator, but now collected by Passenger Focus. Although it has historically been a national indicator, this data is not available for all authorities for all years and the data shown below is a composite of what can be found in authorities' local transport plans.
- 3.11 York has not seen any substantive investment or new innovations in the bus network since 2007/08, so it is unlikely satisfaction with the network will have changed for the better (in fact, the increasing age of the bus fleet in the city as First's 2001 injection of vehicles grows older suggests satisfaction is more likely to have worsened). However, even if customer satisfaction in York is unchanged, then it will have been overtaken by many of the comparator towns and cities, including both Bristol and Cambridge who began the data set with far worse ratings than York.
- 3.12 Customer satisfaction with services in York is shown in figure 3.3. Unfortunately data is only available for York between 2003/4 and 2007/8, but it can be seen that York started the dataset with the second highest customer satisfaction rating (second only to Brighton and Hove). It can also be seen that York is the only city of the comparators where satisfaction fell between 2006 and 2007. There appears to be a link between satisfaction levels and investment in fleet – for example, satisfaction has risen steeply in Cambridgeshire and Nottingham during periods when substantial ongoing investment in fleet took place. County Durham has also benefitted from extensive investment and branding/ marketing exercises by Go North East , primarily in the metropolitan Tyne & Wear ITA area but with many routes travelling into County Durham. Satisfaction has also increased in Leicester and Bristol with the causes of this is not clear (although it is likely that rising satisfaction levels will have been driven to some extent by the free concessionary fares scheme).
- 3.13 **Conclusion:** Customer satisfaction in York started high, but fell between the last two years for which data is available, after showing no substantive increase in during the preceding period.
- 3.14 It is not possible to tell whether this is the beginning of a downward trend or simply a blip. However, all other towns and cities saw their customer satisfaction ratings improve over the same period, with further improvements in more recent years.
- 3.15 Substantial investment in bus services does correlate with increasing satisfaction levels, although satisfaction also increased in some locations where we are not aware of substantial investment taking place. Given the absence of substantive investment in the bus network in York, however, it is likely to have been left behind by many of the comparator towns and cities who have received investment.<sup>23</sup>

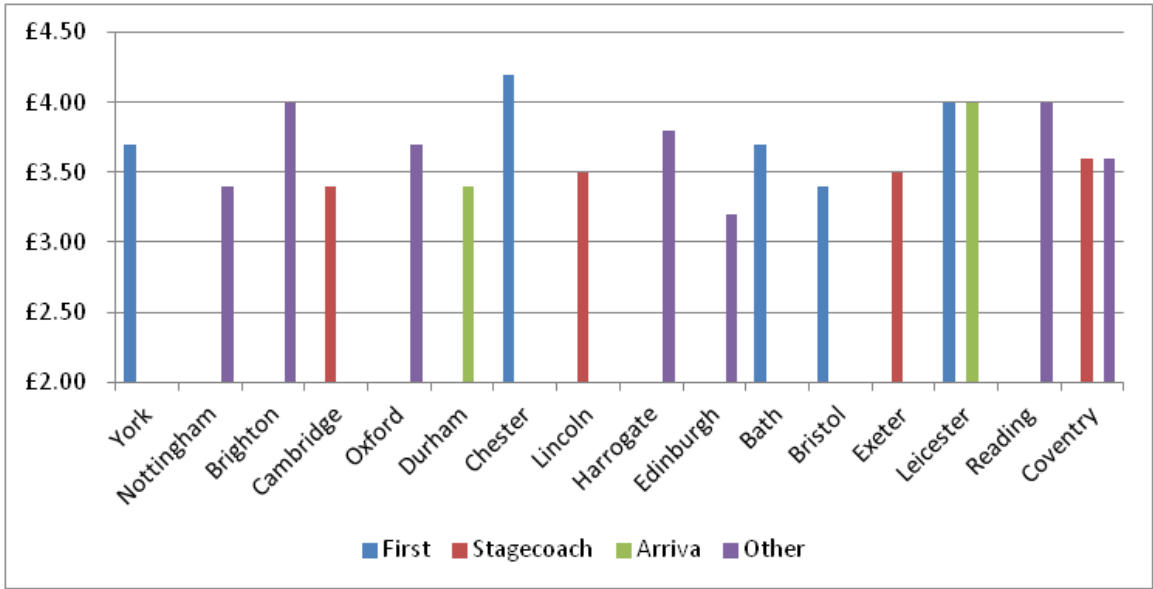
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<sup>23</sup> Introduction of the FTR service co-incides with a period when customer satisfaction in York fell.

Fares

3.16 Figure 3.4 shows the costs of a daily bus ticket for a range of towns and cities, with Figure 3.5 showing park and ride fares. It is possible here to compare York to intuitively similar cities such as Cambridge and Exeter because information on ticket prices is available at bus operating company level.

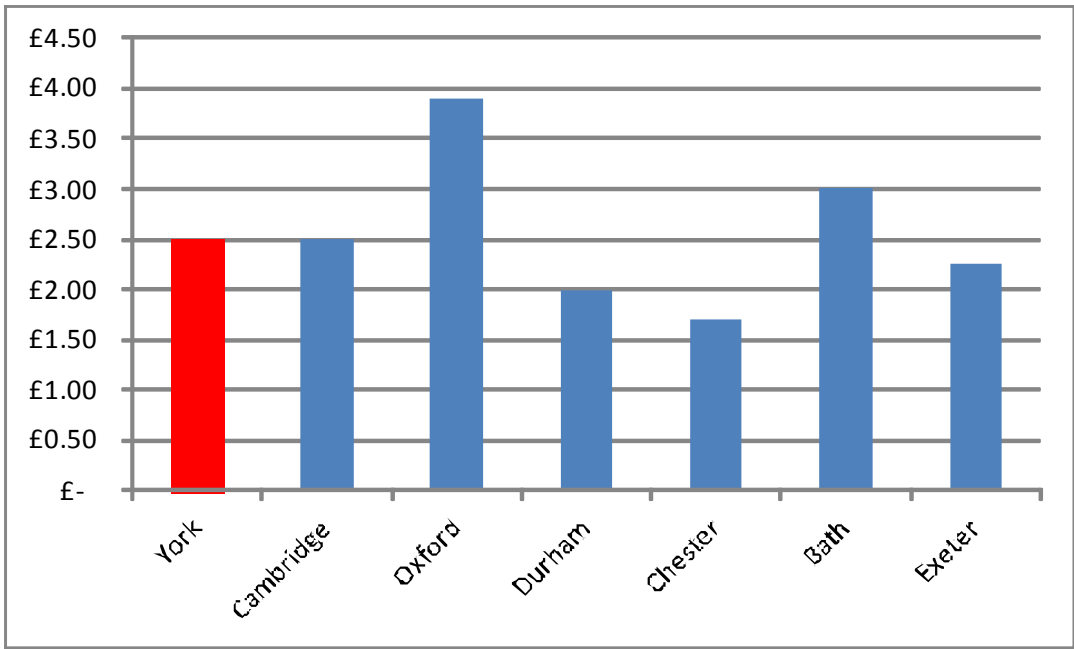
Figure 3.4: Cost of a Daily Bus Ticket (stage services) (mean = £3.67)



“Other” category: Nottingham (Nottingham City Transport day ticket); Brighton (Go-Ahead Brighton); Oxford (Oxford Bus Company); Harrogate (Harrogate and District (Transdev)); Edinburgh (Lothian Buses); Reading (Reading Buses); Coventry (National Express West Midlands).

Figure 3.5: Park and Ride Ticket Prices (per return journey – mean = £2.55)





- 3.17 As can be seen, the daily ticket price for First's buses in York is £3.70, a little above the average daily ticket price for all the operators listed (£3.67). In general, Nottingham, Cambridge, Durham, Lincoln, Edinburgh, Bristol, Exeter and Coventry have daily ticket prices which are lower than FirstYork's, whilst Oxford and Bath are the same and Brighton, Chester (price quoted is the mean of a number of zonal products), Harrogate, Leicester and Reading have more expensive tickets. None of the daily tickets are more than 50p different from the York price.
- 3.18 For stage services, there is a relatively weak correlation between city size and ticket price, with some of the larger cities in the group having some of the cheapest daily ticket prices – for example, Edinburgh, Coventry and Nottingham. There is also little correlation between ownership structure and ticket price, with some cheaper tickets quoted by listed companies (e.g. Cambridge (Stagecoach), Durham (Arriva) and Bristol (First)) and one of the more expensive tickets quoted by a municipal operator (Reading Buses).
- 3.19 In the only location where there is clear head to head competition between two of the large groups (Leicester), ticket prices are relatively expensive, although they are the same (at £4.00/day).
- 3.20 For park and ride fares, the cost of a park and ride return ticket in York (£2.50)<sup>24</sup> is, slightly below the average of £2.55 (although this is inflated by the Oxford fare, which includes a £1.50 parking charge). Park and ride ticket prices are generally cheaper than stage services for all of the towns and cities surveyed, although the inclusion of the parking charge in Oxford means that for someone who travels to the site in a car on their own and pays the peak time bus fare (£2.70) would be paying £4.40 in total – 70p more than the cost of a day bus ticket (the comparator here assumes the driver pays the off peak fare of £2.40 return, plus the £1.50 parking charge).

### *Conclusion on ticket prices*

- 3.21 Daily ticket prices in York are:
- Around average for FirstYork stage services; and
  - Around average for the Park and Ride.

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<sup>24</sup> It should be noted that this price is not subsidised in any way – in fact it allows a premium of £700k to be paid to the Council by the operator each year. No comparison has been made with other park and ride services because the extent of local authority support for each one is not known.

- 3.22 Ticket prices appear to be determined by the underlying viability of the local bus market<sup>25</sup>, with relatively weak correlations between daily ticket price and:
- City size;
  - Ownership structure of the operating company; and
  - Competitive market structure.

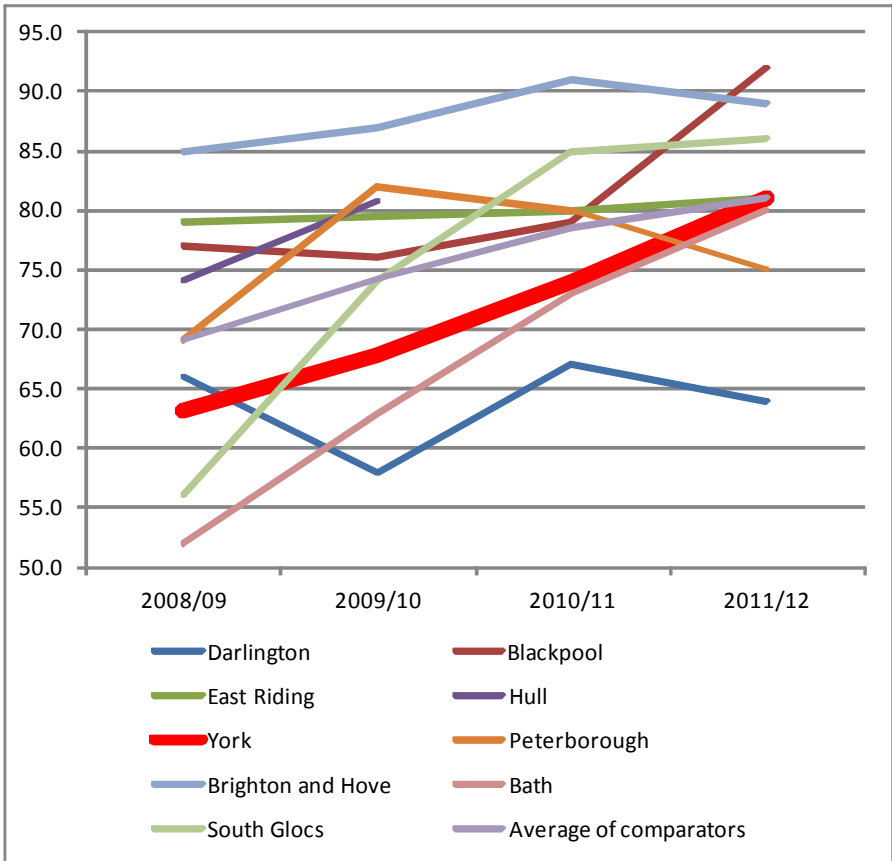
### *Punctuality*

- 3.23 Figure 3.6 shows service punctuality in York (for non-frequent bus services – i.e. less than every 10 minutes – at terminals and intermediate stops). The data indicates an improving trend, with punctuality in York rising from below average to around the average of the comparators between 2008/09 and 2011/12. In the most recent data, 81% of buses arrived on time, which is more than the VOSA absolute minimum of 70% at intermediate stops, but less than the DfT's suggested target of 90%, which is exceeded only in Blackpool (although Brighton comes close and exceeded it last year)

### **Figure 3.6: Service Punctuality (Source; DfT national indicator statistics)**

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<sup>25</sup> This itself will be determined by many factors including local demographics, parking prices in city centres, attractiveness of alternatives to bus use such as cycling and walking in each city. However, a key determinant will also be satisfaction with bus operators (and therefore their ability to attract trips onto the bus network).



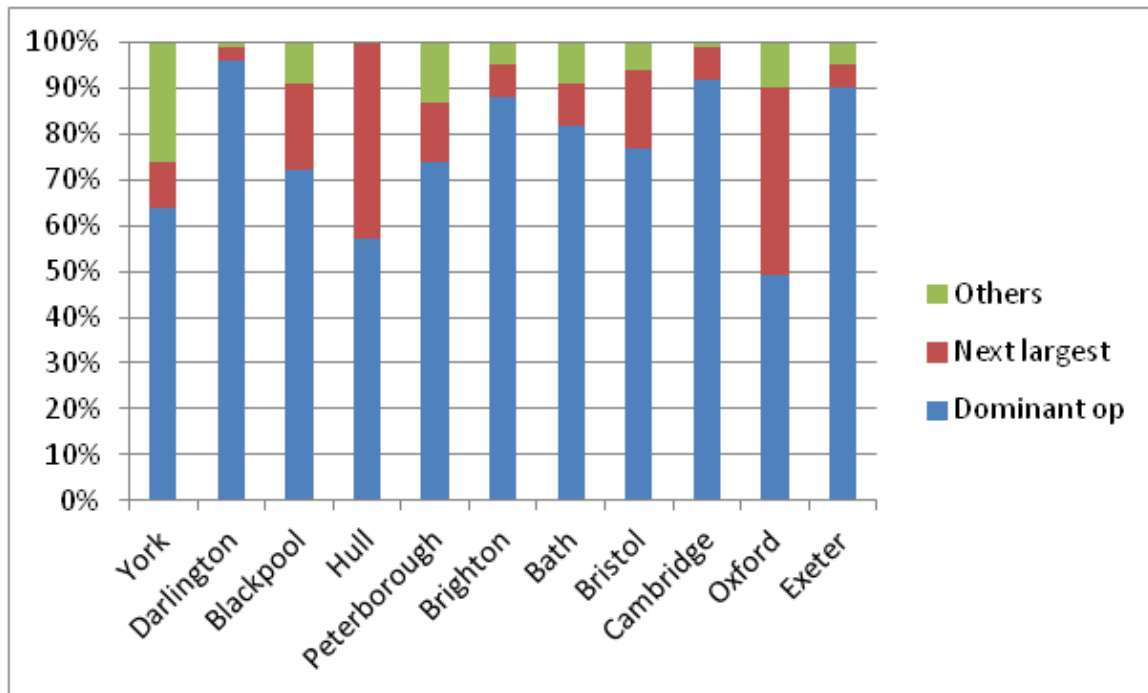
### *Market Structure*

- 3.24 Figure 3.7 shows the proportion of the market taken by the principal operator, next largest operator and other operators for York and a number of comparator towns and cities<sup>26</sup>. The data used for the chart (source: Competition Commission, January 2012) predates the acquisition of Pullman's routes by Transdev.

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<sup>26</sup> Source: Competition Commission Route and Urban Area Analysis: Local Buses Inquiry, January 2012.

Figure 3.7: Market Composition



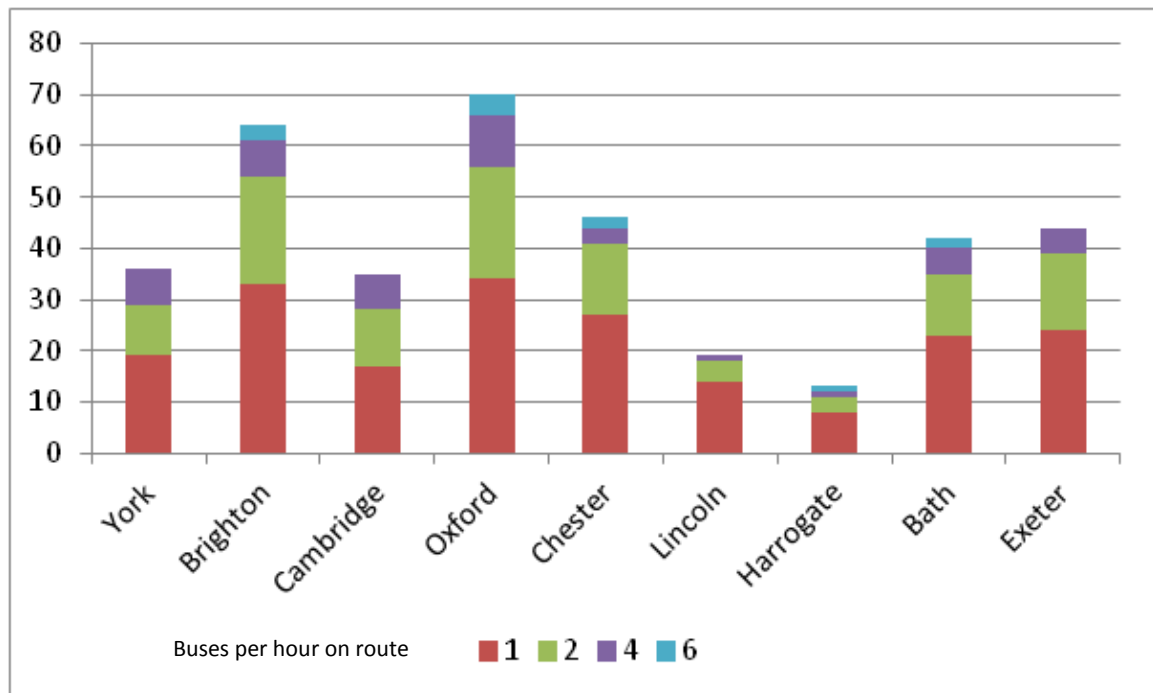
3.25 It can be seen that York has one of the lowest proportions of the market taken by the largest operator (only Hull and Oxford are lower) and the largest proportion of the market provided by “other” operators (although this position has changed since the publication of the CC’s data, through Transdev’s purchase of the York Pullman stagecarriage routes – however, even allowing for this York is likely to still have the largest proportion of routes not provided by the two largest operators in the city). It should also be considered that the largest operator’s figures contain park and ride services (approximately 30% of their total passengers carried). If the park and ride passengers were split out from First York’s stage passengers (for which there is a case given that park and ride has a different service offer, branding and a largely separate ticketing scheme), then this would reduce First York’s market penetration to less than 50% of the York market and make it the smallest principal operator by some margin.

- 3.26 **Conclusion:** the supply market for bus services in York is more fragmented than in the comparator towns and cities, with smaller operators providing a larger than usual proportion of services. This has the disadvantage that any operator-authority partnership is likely to be complex, with many operators involved and complex multi-lateral agreements required to deliver any network wide improvements which are sought. This is discussed in more detail in section 6 of this report.
- 3.27 The most significant implication of the fragmented supply market is that multi-operator ticketing should unlock substantial patronage growth in the city, with an effective multi-operator ticket offering the potential to improve bus patronage on journeys requiring an interchange in the city, or on corridors where services are offered by more than one operator (which is the case with most corridors in York). Such tickets are now being introduced but the necessary agreements have been difficult to negotiate with so many partners involved and the need for the group operators to have regard to national policies.

### *Service span*

- 3.28 Service span indicates the supply of bus services – specifically their frequency through the day and how frequency falls at the beginning and end of the day compared to the full daytime service. This is important to passengers – for example, a bus service which operates at a continuous 10 minute frequency between 6AM and 7PM allows much more flexible use by passengers than a service which operates at core frequency between 7:30 and 5PM, falling to a lower frequency when many people are still traveling to/ from work.
- 3.29 Work by the Competition Commission considered the provision of bus networks in all urban areas of over 30,000 population in the UK. The chart below shows the number of routes of a given frequency operating between 7AM and 10PM Monday to Friday for a range of similar towns and cities to York.

**Figure 3.8: Service Reach (buses per hour 7AM to 10 PM)**



- 3.30 As can be seen, York is notable in having no 10 minute frequency routes which operate throughout the day, although Brighton, Oxford, Chester, Bath and Harrogate all have them.
- 3.31 A more detailed analysis is presented in Table 3.1 which looks at the frequencies across the day of specific services (chosen at random from services in York, Cambridge, Oxford and Nottingham). Discounting service frequency, it can be seen that services in the other cities tend to operate at their core daytime frequency earlier and later. For example:
- Services in Cambridge operate at near core frequencies between 6AM and 8AM, whereas services in York are typically operating at between 50% and 75% of their core daytime frequencies;
  - Services in Oxford also operate at higher frequencies on the shoulder of the day and tend to start operating earlier in the morning than services in York and later in the evening;
  - Services in Nottingham do tend to operate at lower frequencies at the beginning/ end of the day, although one of the services operates through the night; and
  - Evening and Sunday frequencies in York are in-line with the comparators.



**Table 3.1: Comparison of Frequencies (% figures represent shoulder frequencies compared to core daytime frequencies)<sup>27</sup>**

	York			Cambridge		Oxford		Nottingham	
Service number	First 1	First 6	First 12	Citi1	Citi8	City2	City5	1	15/16
First bus	0618	0645	0710	0550	0605	0518	0455	0505	0610
6-8AM	8 (75%)	6 (50%)	2 (50%)	10 (84%)	6 (100%)	24 (100%)	13 (82%)	6 (75%)	12 (75%)
0800-1700	10 mins	10 mins	30 mins	10 mins	20 mins	5 mins	8 mins	15 mins	8 mins
5-7PM	8 (75%)	9 (75%)	3 (75%)	9 (75%)	5 (84%)	24 (100%)	14 (88%)	5 (63%)	9 (56%)
Eves	30 mins	30 mins	Hourly	30 mins	Hourly	10 mins	15 mins	30 mins	30 mins
Last bus	2300	2300	2239	2300 (later Fri/Sat)	2235	0008	2353	Runs through night	2245
Suns	20 mins	30 mins	Hourly	30 mins	30 mins	10 mins	15 mins	30 mins	30 mins

3.32 **Conclusion:** The implication of this analysis is that the bus service in York is less good at catering for demand across the day than it is in comparator towns and cities, with service frequencies tending to ramp up to the core frequency later in the morning and fall earlier in the evening. The first bus of the morning tends to operate later in the morning in York. Evening and Sunday frequencies, which often operate with a degree of local authority assistance, are similar for all the comparator cities.

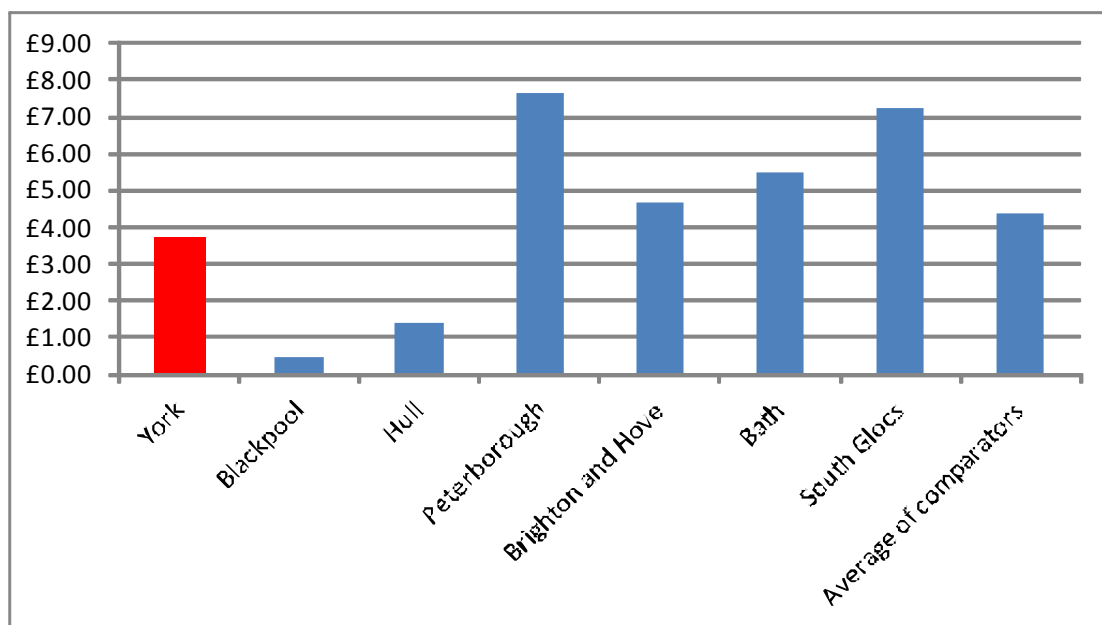
### *Supported Services*

<sup>27</sup> Source: operator published timetables from FirstYork, Stagecoach East, Oxford Bus Company, Nottingham City Transport.

- 3.33 Figure 3.9 shows expenditure on supported services<sup>28</sup> for those comparator authorities for which data is available.
- 3.34 York spends around £730,000 pa on service support, but is unique in having virtually no **net** expenditure on supported services because the premium Firstgroup pay to operate the park and ride service offsets the Council's own expenditure on supported non profitable services elsewhere in York. Other authorities (Blackpool is perhaps an exception as its figures include revenue support to the bus and tram system) pay revenue support of between £350,000 pa (Hull) and £1.9 million (South Glocs), with a mean of the comparators of just under £1 million pa.

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<sup>28</sup> i.e. services which would not operate without support from the local authority. Source: ATCO/ CYC.

**Figure 3.9: Supported Services (spend per head by authorities, 2011/12)**

3.35 An analysis was also undertaken of the number of bids York received for tender contests during 2011/12. For the 12 local bus tender contest the Council received an average of 4.25 bids per tender. No contest had less than three bids and at least two of the major operators in the city (Arriva, First and Transdev) bid for each tender. This indicates that there is a well contested market for tenders which the city council put out.

3.36 **Conclusions on supported services:** York is very unusual in having a bus network where income from the park and ride contract offsets expenditure on supported services. As such, there is an opportunity for CYC to consider a greater level of expenditure to support services on the margins of the peak, if de-minimis arrangements permit this. There is a good degree of competition for tenders in York, both in general and between the national operators with a presence in the city.

### *Conclusions on Benchmarking York*

3.37 A benchmarking exercise like this is necessarily high level, but it does allow us to compare some key statistics across a number of comparators to York. From what data we can see:

- Bus trips per head are around the average for the comparators, although the Council's focus on sustainable transport suggests that bus trips per head for York should be higher than the average;
- Although the number of bus trips in York is increasing, the growth rate is much lower than in other areas – but the rate of growth however is likely to be sufficient to meet the targets set for bus patronage growth in LTP3. Access York, Intelligent Travel York and Get on Board York are likely to increase this rate substantially – much nearer the target expressed in the “Get York Moving” chapter of the Council Plan (10% 2011/12 – 2014/15),

although this will also depend upon complementary investment being forthcoming from operators;

- Customer satisfaction for York is an incomplete data set, but appears to start high and begin to deteriorate at a time when the ratings for the comparator towns and cities improve. This is clearly a worrying development. York has not seen any substantive investment in bus services since the last set of statistics was collected in 2007/8, so it is likely that customer satisfaction in the city now will be lower than in the comparators, although this cannot be demonstrated in the absence of comparative statistics;
- Fare levels in York are about average for both First's stage services and the park and ride. There appears to be a weak link between the ownership of bus companies and the price of their daily tickets, with one municipal company, Reading Buses, having one of the highest prices;
- York has an unusually fragmented supply of services, with a "small" share for the principal operator and a high proportion of services operated by smaller operators in the city. This structure means that an effective multi-operator ticket in York has the potential to significantly improve passenger experience and use of services, but experience has shown this has been complex to negotiate with so many partners involved and the need for the group operators to have regard to national policies;
- The bus network in York has fewer high frequency all day routes, with service frequencies ramping up relatively late in the day and ramping down relatively early after 5PM. This is likely to cause particular problems for people who wish to use the bus outside of core hours, particularly on the shoulders of the peak when many passengers will expect the daytime service levels to still be in operation;
- York is very unusual in having a bus network that operates with no net local authority support (income from park and ride cancelling out expenditure on service support) and the Council should consider whether additional service support is justified; and
- There is a high level of competition for bus tenders in York, which is likely to keep prices competitive.

## 4 What do people think of buses in York?

### *Introduction*

4.1 Chapter four of the report considers perceptions of bus services in York based on research with York residents through a TalkAbout questionnaire, and another survey with bus users in York, collected on park and ride and stage services across the city in the Spring of 2012. The objectives of the two surveys were:

- To identify what aspects of the bus service in York were seen as strong, and which were seen as weak;
- To identify what barriers there were to people using bus services more in York (if they were already users), or using the bus service for the first time (if not already users);
- To compare the performance of the different operators in the city, and assess whether all operators were providing services to the same standard, or whether some operators were providing weaker services than others; and
- Generally, to collect information about bus users which could be used to tailor services more effectively to their needs.

### *Talkabout Questionnaire*

4.2 In Spring 2012 1,500 questionnaires on bus services were sent out to members of CYC's TalkAbout Panel<sup>29</sup>. 736 completed questionnaires were received, a response rate of 49%. Although respondents are more likely to be bus users than non-respondents (because the sample is self-selecting), the response rate of 49% is itself evidence that bus services are an emotive topic of importance in York. Furthermore, it is likely that the 51% who did not respond will also include many bus users, albeit ones too busy to return the survey, or who have lost the survey or changed contact details – therefore it is unlikely that the 51% of the sample who did not respond are entirely non-bus users.

4.3 Of those responding:

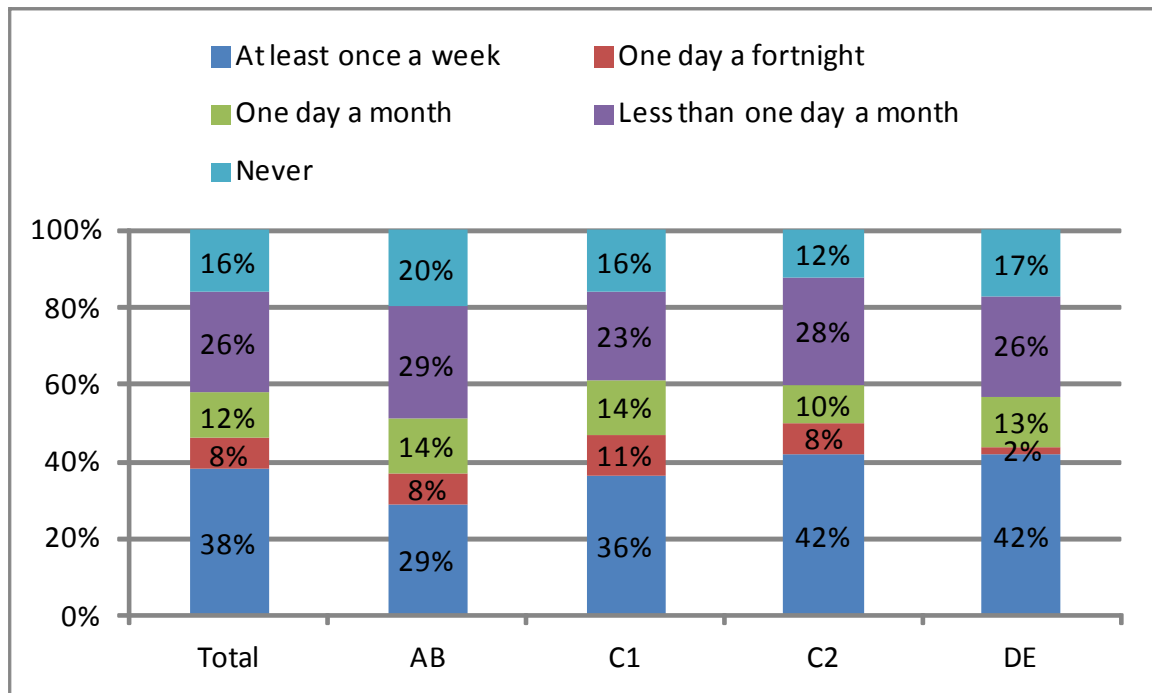
- 39% used buses in York at least once a week and only 16% said they never used buses;
- 85% of respondents who used buses used Firstgroup's services, 71% used park and ride and 57% used Transdev York or Coastliner services. None of the other operators was used by more than 30% of respondents;
- The greatest bus use was for commuting (51% of respondents); shopping (45%) and personal business (40%);

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<sup>29</sup> A panel of 1,500 York residents who are consulted about CYC initiatives. The panel is socio-demographically stratified to ensure it is a representative sample of York's population (e.g. broken down by age/ gender/ social group).

- 66% of the sample were not entitled to an ENCTS concession, whilst 29% of the sample held a concessionary pass and 5% were entitled to a pass but did not hold one; and
- Bus use was similar across socio-economic groups, with those respondents in social groups A and B using buses broadly as often as those in groups D and E (figure 4.1).

**Figure 4.1: Use of Bus Services split by Social Group**



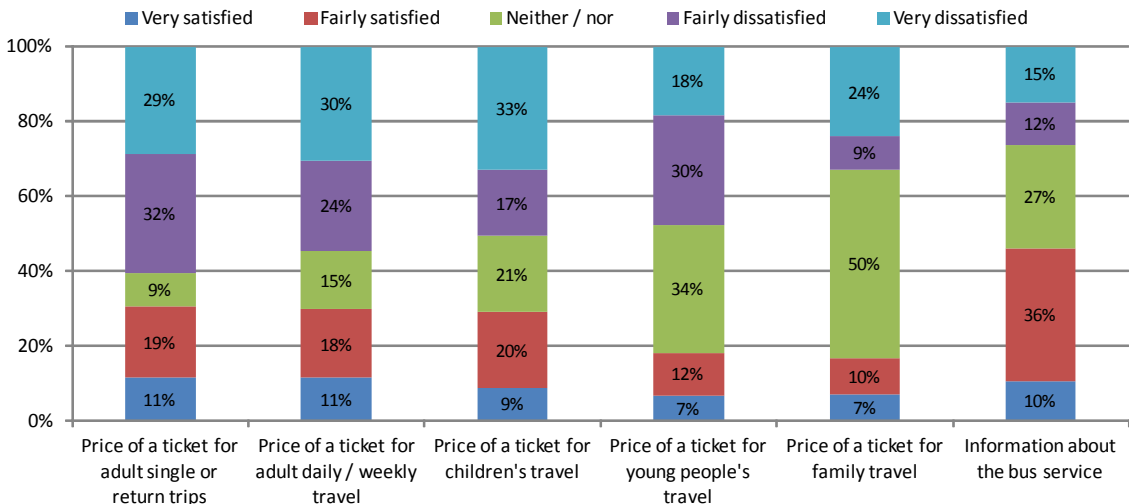
4.4 The absence of a great deal of variation in bus use between respondents in different social groups is interesting because it suggests that people in social groups A and B (professional/ managerial) are almost as likely to use bus services in York as those in social groups D and E (unskilled/ economically inactive). As most people in social groups A and B are likely to have access to a car, the implication is that many of the people using buses in York are discretionary users, choosing to use the bus despite the availability of alternatives, rather than the more traditional view that most bus users have no car available and are using the bus because they are, in practice, a captive market.

4.5 Bus users who are also car available are likely to be more sensitive to a range of factors, including fare levels, vehicle standards and service frequencies, than those who do not have a car. This implies that, although the bus service in York is currently appealing to people who do not have to use the bus, it has to continue to appeal to these people to maintain its market share and patronage, and increase its appeal if patronage is to grow. It also implies that the Council has a role in controlling other aspects of the transport system to ensure the bus is attractive in comparison to alternative means of transport (for example, by providing good park and ride services, controlling parking prices in the city centre so they encourage public transport use and ensuring that speeds for bus passengers are competitive (e.g. through bus priority measures)).

*Satisfaction with attributes of service (TalkAbout Questionnaires)*

4.6 The questionnaire then asked respondents specifically about individual aspects of the bus service and their satisfaction or otherwise with them (Figures 4.2 to 4.6).

**Figure 4.2: How satisfied are you with bus fares and the quality of bus information?**



**Figure 4.3: How well do bus services meet your travel needs?**

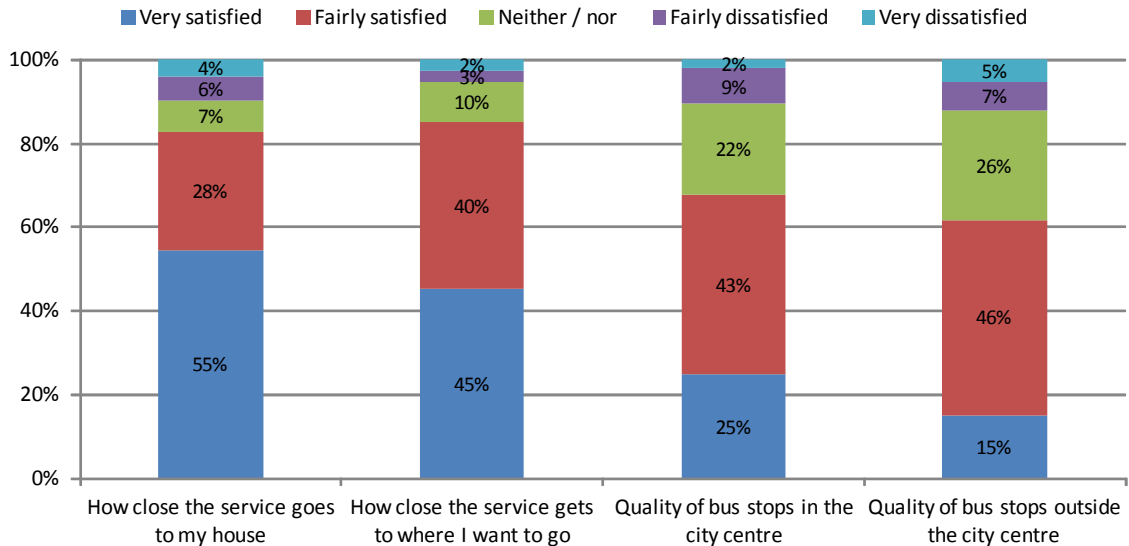


Figure 4.4: What are your experiences of using the bus?

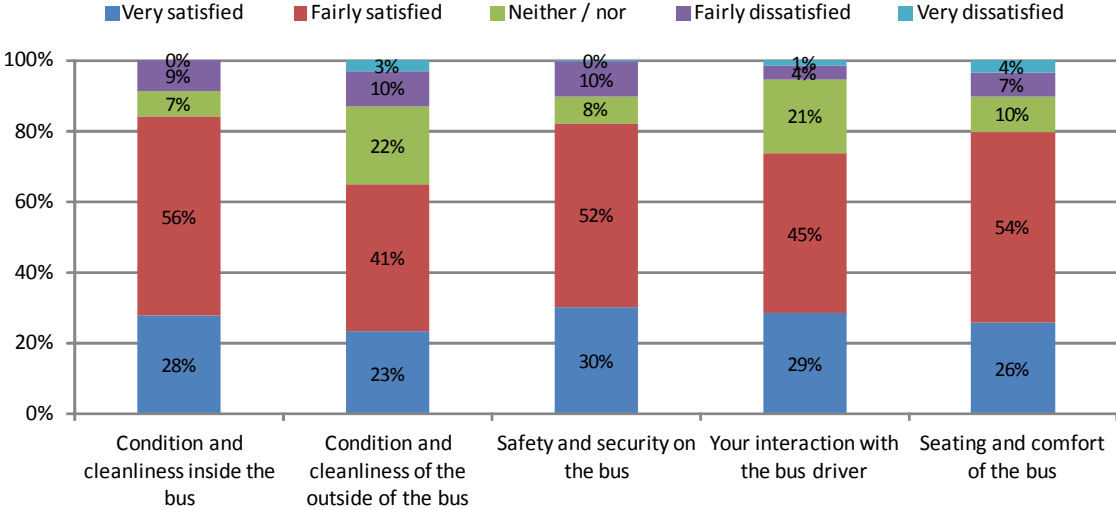
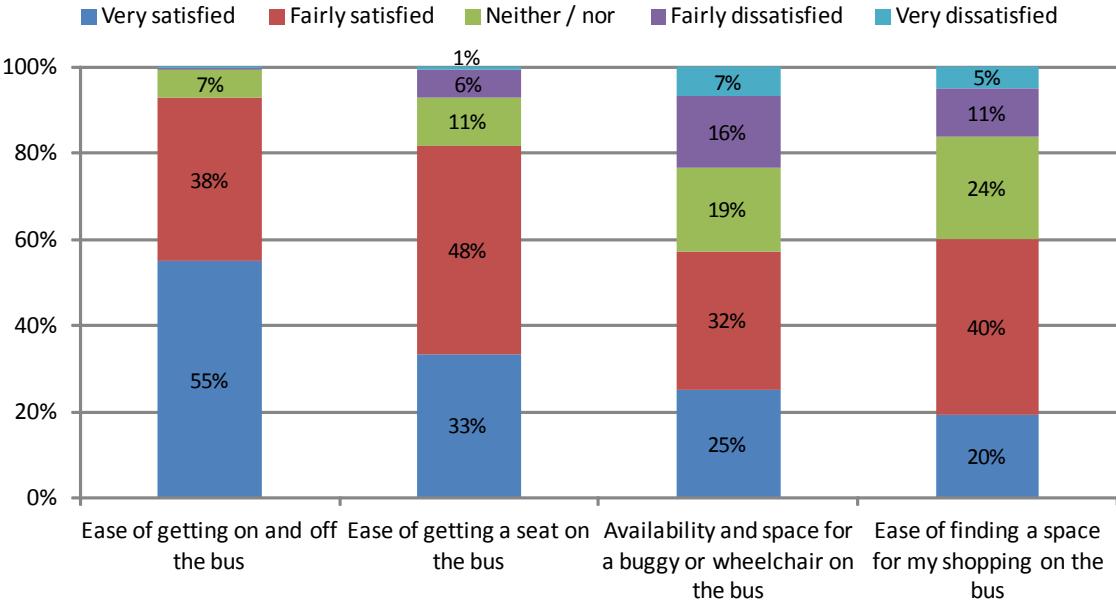
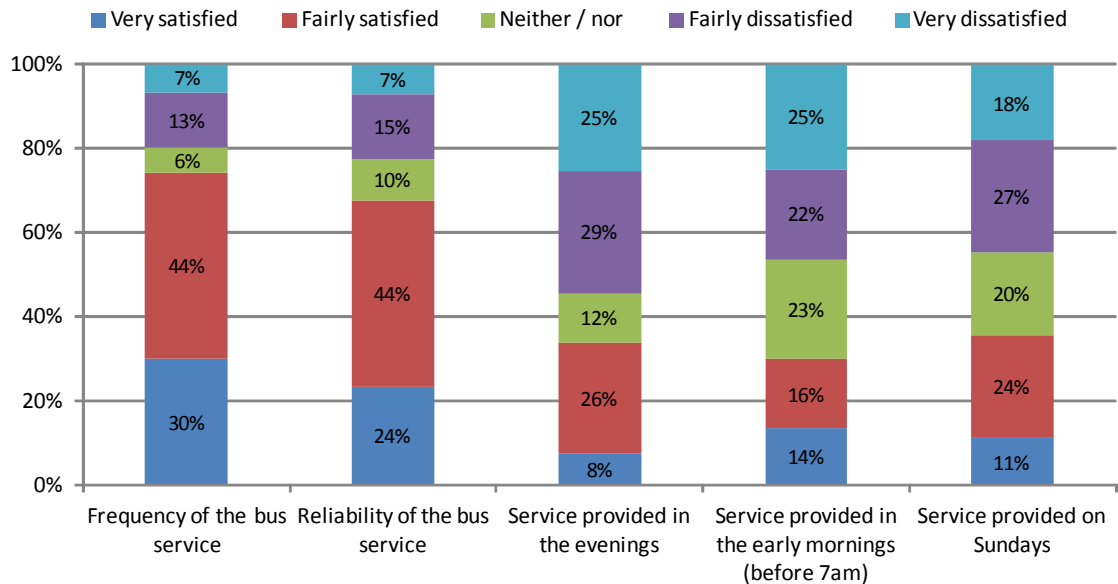


Figure 4.5: How do you find boarding and alighting from the bus?





**Figure 4.6: How satisfied are you with levels of service on the bus?**



4.7 Areas which scored poorly in the TalkAbout surveys (satisfaction levels less than 60%) are:

- The cost of travelling by bus;
- Information about bus services;
- The availability of space for shopping and pushchairs/ wheelchairs on buses; and
- Levels of service in the evening, early morning and on Sundays.

4.8 Areas which scored well (satisfaction above 80%) included:

- The ease of getting on and off the bus;
- Safety and security whilst on the bus;
- How close services got to where people wanted to travel; and
- Condition and cleanliness of the inside of the bus.

4.9 Attributes which scored in the middle of the range (between 60% and 80%) included:

- Service reliability;
- Interaction with the bus driver;
- Seating and comfort on the bus;
- Frequency of service;
- Condition and cleanliness of the outsides of buses ; and
- Stop and shelter condition in the both the city centre and out of the city centre.

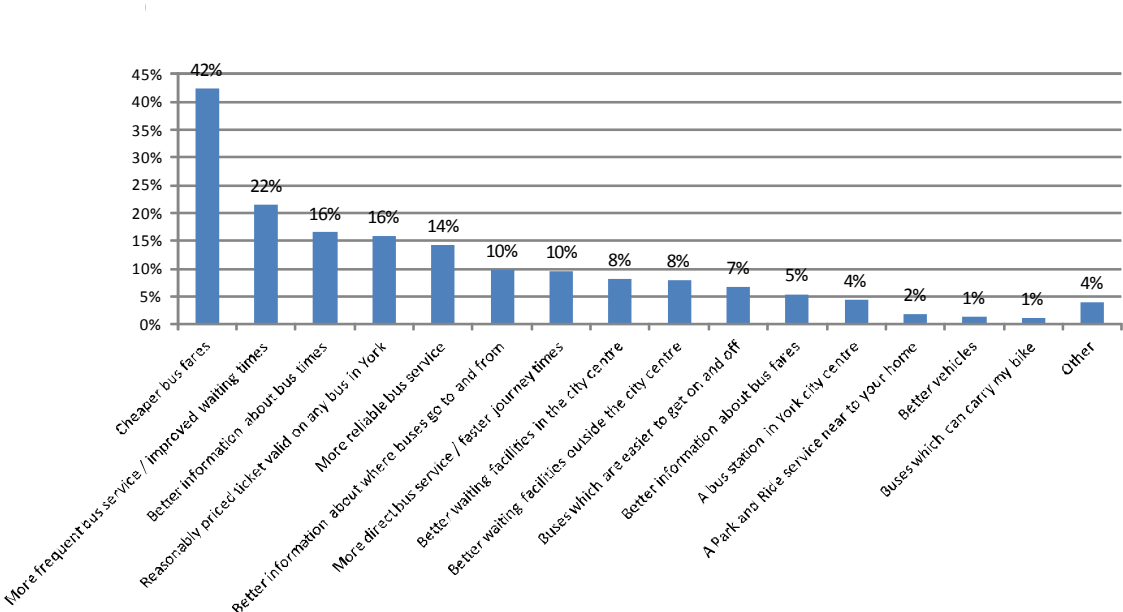
Getting People to use the bus more

4.10 The survey then asked if respondents who did not currently use the bus regularly would consider using the bus for some or more of their travel in future. Of the sample:

- 20% said that they would consider this;
- 30% said they preferred to walk;
- 22% said they preferred to cycle; and
- 28% said they preferred to drive.

4.11 When asked about what improvements would make respondents more likely to use the bus, the most popular measure was “cheaper bus fares” (42% of respondents), followed by “more frequent services” (22%), “better information” (16%), a multi-operator ticket (16%) and “more reliable services” (14%) (see figure 4.7).

Figure 4.7: Factors making people more inclined to use the bus

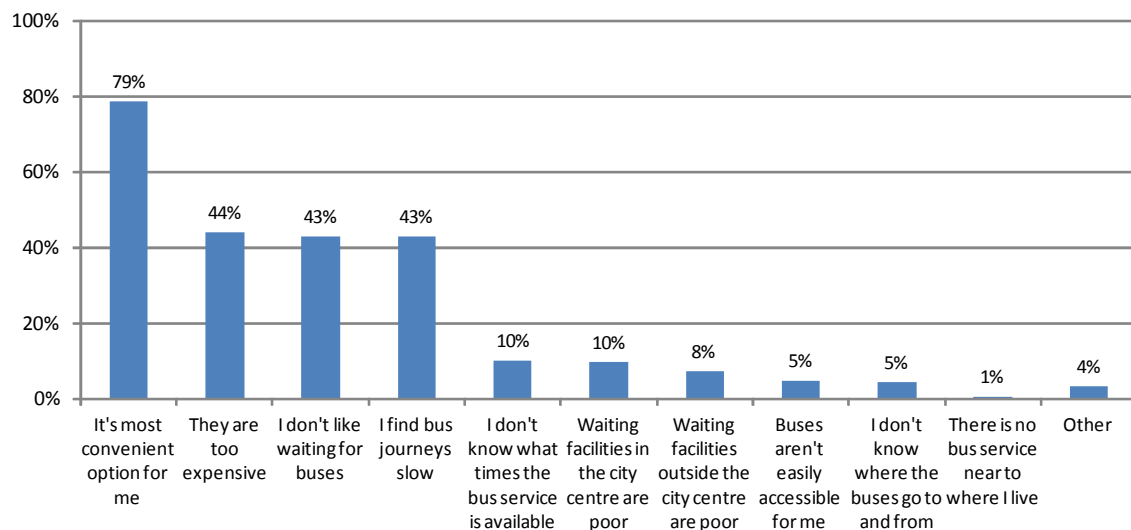


4.12 The sample was also asked, if they did not use the bus now, why they prefer to use other modes. Most respondents simply said they were the “most convenient option”, highlighting the fact that there will also be large numbers of journeys (for example, very short journeys, orbital journeys between suburbs, cross city journeys or journeys in rural areas) for which the current bus network is not suitable or other modes enjoy an overwhelming advantage. However, other reasons given were:

- Buses are “too expensive” (44%)<sup>30</sup>
- Respondents didn’t like waiting for buses (43%)
- Bus journeys were perceived as “slow” (43%)
- There is then a substantial fall to attributes listed by 10% of respondents as barriers to bus use, including:
  - Lack of information on service times
  - Poor waiting facilities.

4.13 Figure 4.8 shows the entire data set.

**Figure 4.8: Why people walk, cycle or use their car instead of the bus**



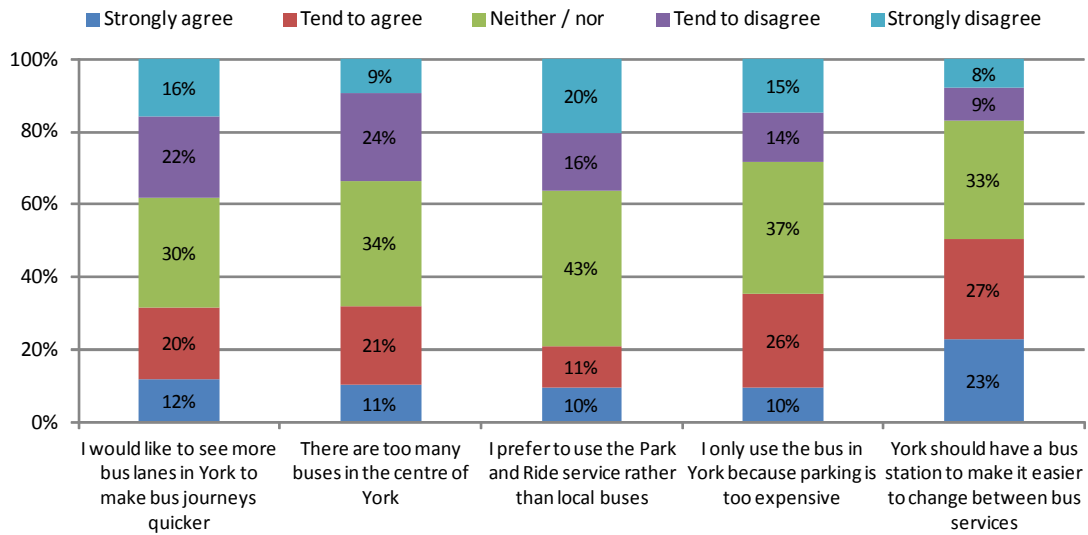
4.14 It can be seen, then, that the cost of bus travel emerges as a key reason why people choose not to use bus services, or are dissatisfied with the services they use. Reliability and waiting times for bus services also emerge as priorities. Condition of stops and shelters appear to be important and the respondents also suggest that improving information would lead to higher use of buses and improved levels of satisfaction.

<sup>30</sup> The attributes sum to more than 100% because respondents were able to choose more than one attribute.

*Improvements to buses in York*

4.15 Respondents were then asked if they agreed with a number of statements about the bus network in York, with responses shown in Figure 4.9.

**Figure 4.9: Do respondents agree with statements?**



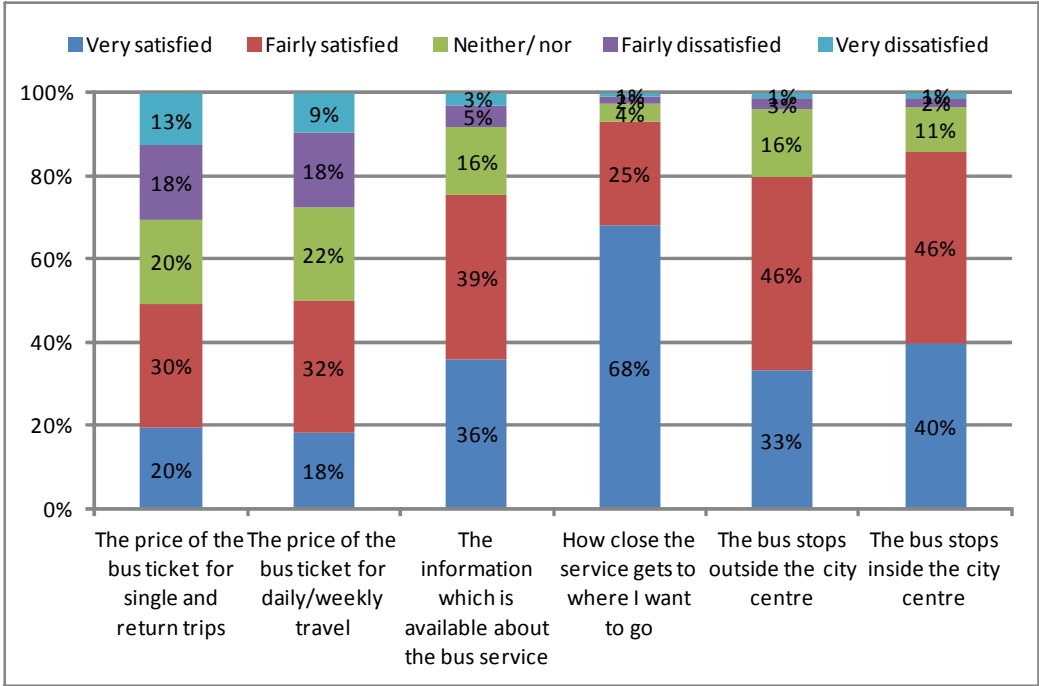
4.16 The statement with the greatest support was that provision of a bus station in the centre of the city would improve interchange (only 17% of respondents did not agree with this), which implies that bus users currently feel the existing facilities are a deterrent to interchange compared with a bus station. Around one-third of respondents felt that there were too many buses in the centre of York and one-third wanted to see more bus lanes in the city (although 38% of respondents said they did not wish to see more bus lanes in the city). Only a small proportion of respondents (21%) said they preferred to use the park and ride instead of local buses, implying that there is not a large group in the population who will consider using park and ride but would not consider using other bus services in the city. 36% of respondents said that they only use the bus in York because parking is too expensive – highlighting that Council interventions such as relatively high parking prices in the city have a clear role in driving patronage on the city’s bus service, and correlating with the response above (figure 4.1) suggesting that bus use is similar between people likely to own cars and those who are less likely to own cars.

### *On Bus Surveys*

- 4.17 During April 2012 372 questionnaires were collected on Park & Ride services, across each of the 5 sites in York, while 598 surveys were carried out on local stage carriage bus services (“stage services”) operating in the city. The questionnaires were divided into three sections: the first asked respondents about travel habits, journey purpose, ticket type, origin and destination; the second asked about user satisfaction for a range of attributes of the bus service; and the third collected demographic information about the respondents (e.g. age, car availability, bike availability and home post code). Section three closed with a question asking respondents if they wished to take part in focus groups to discuss local bus services. Passengers were questioned between 0730 and 1000 in the morning and 1530 and 1800 in the evening, Monday to Friday – therefore there is likely to be a bias towards commuters in the sample. Evening, Saturday and Sunday services were not surveyed.
- 4.18 The questions in Section 1 of the form outlined the following characteristics of the surveyed bus users in York:
- The most popular uses for the service were commuting to work (38% of those questioned) and shopping (32%), followed by visiting friends and relatives and going to school/ college (both 8%). 6% of users were tourists/ visitors to York;
  - 40% of users bought an adult single or return ticket, 25% had concessionary passes (this group is probably under-represented in the sample because many services were surveyed during the AM peak when concessionary passes are not valid) and 18% had an operator period ticket. Only a very small proportion of users had student or child tickets, suggesting that young people make up only a relatively small market for travel in York;
  - Less than 30% of users were over 65, and park and ride users tended to be younger than the users of the stage services;
  - 5% of users had a disability which affected how they used the bus service; and
  - Nearly 70% of park and ride users had access to a car which they could have used for their journey instead of the bus, compared to only 30% of “stage” service users. For both park and ride and stage services, around 25% had access to a bike which they could have used instead of the bus.
- 4.19 This data, then, would appear to suggest that park and ride users are younger and more likely to be car available than passengers on “traditional” stage bus services in York – with the implication that the stage services are more likely to be serving traditional non-car available bus users. However, it is interesting that nearly one-third of park and ride users are not car available, implying that the service has a substantial walk up catchment, at least some of whom will be using the service because they feel it meets their travel needs more effectively than conventional stage services which they could have used as an alternative.

4.20 In Section 2 of the questionnaire users of the service were asked about their perception of the attributes of the bus service they were using when surveyed (Figures 4.10 to 4.13).

**Figure 4.10: How satisfied are you with the bus fares, information and bus stops in York?**



**Figure 4.11: How satisfied are you with the condition/ cleanliness, safety and seating on the bus?**

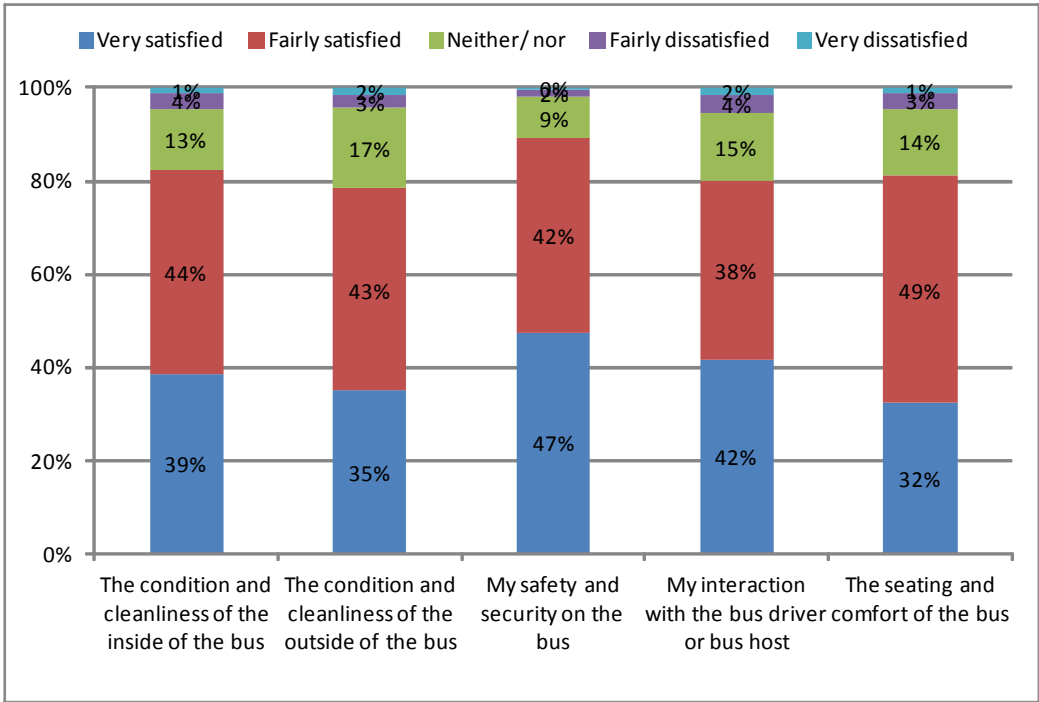


Figure 4.12: How satisfied are you with the following aspect of the bus service you are using today?

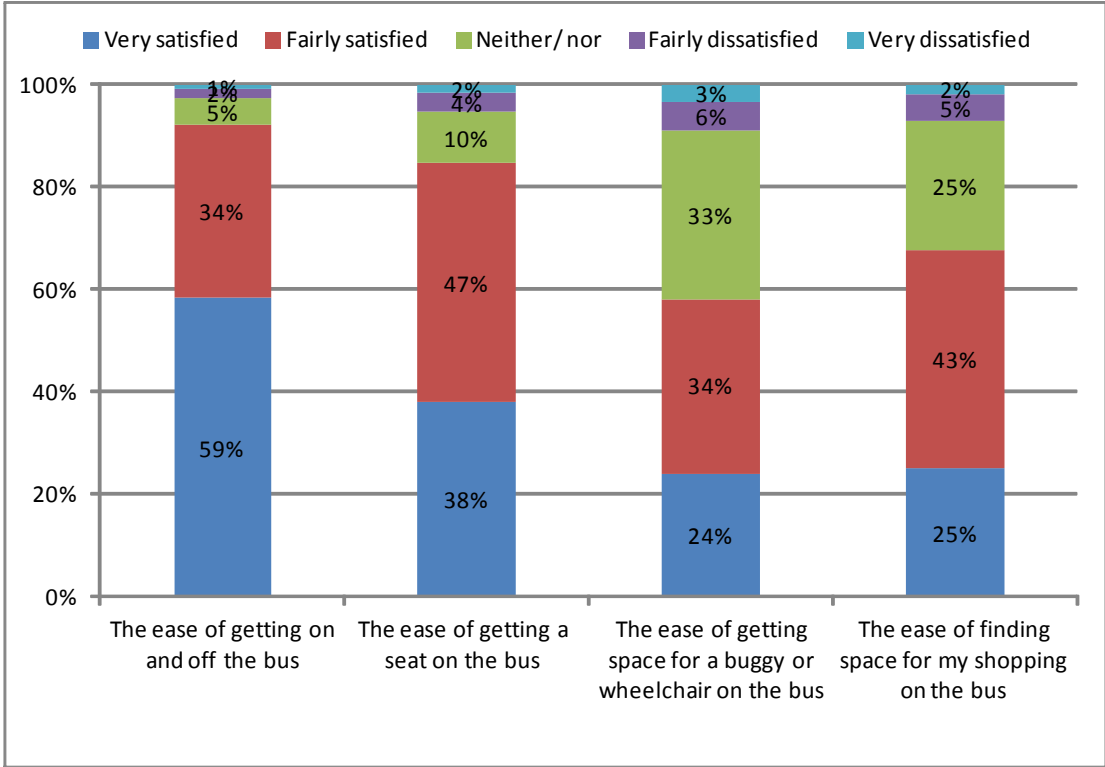
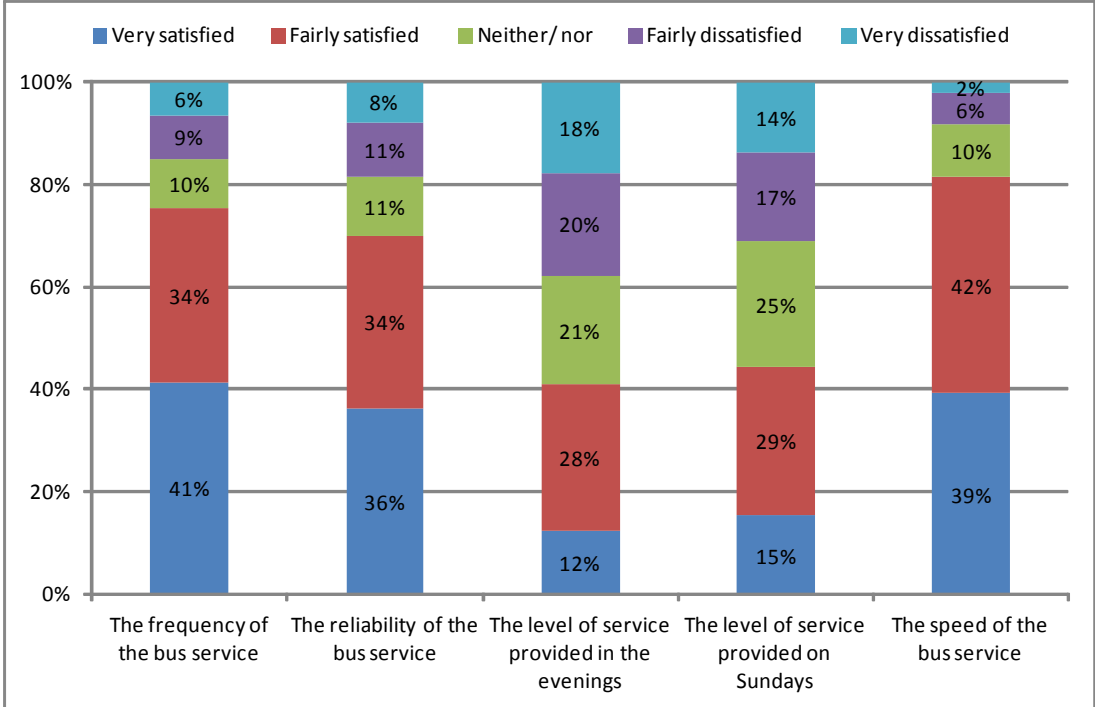


Figure 4.13: How satisfied are you with the following aspect of the bus service you are using today?



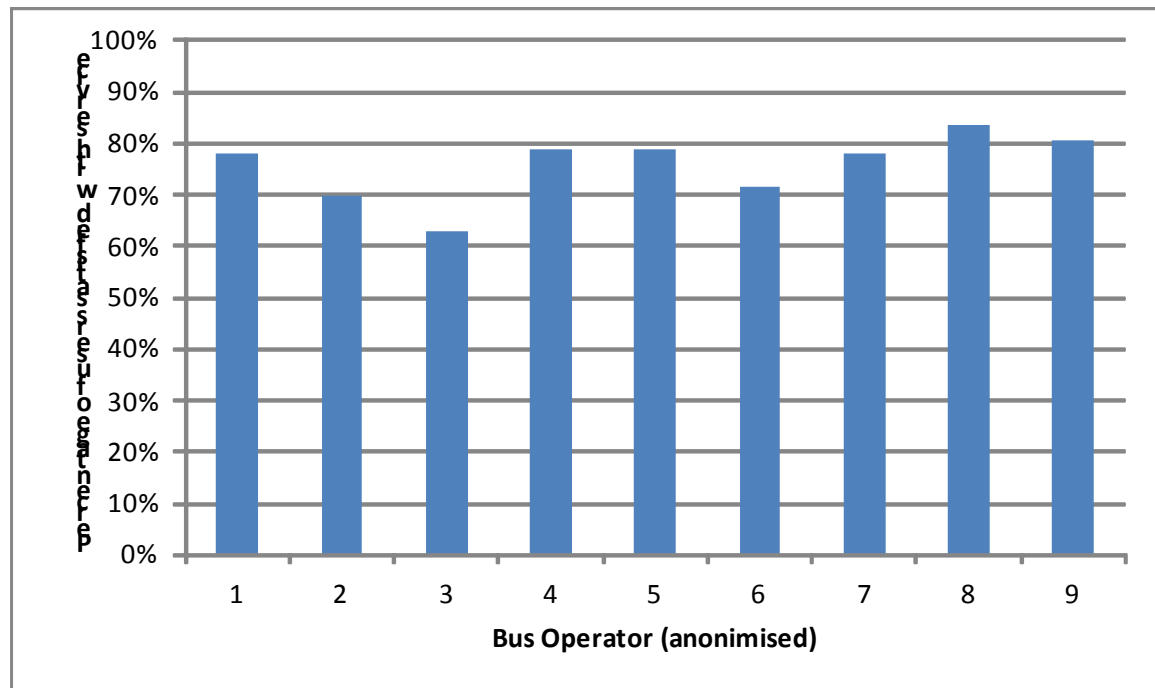
- 4.21 Areas which bus users assessed as weak (below 60% satisfaction) are:
- Ticket prices;
  - The ease of finding space for a buggy or pushchair; and
  - Evening and Sunday services.
- 4.22 Overall, areas of high satisfaction (80%+) were:
- How close the service gets to where people want to go;
  - Condition/ cleanliness of the inside of the bus;
  - The safety and security of the service;
  - The ease of getting on and off the bus for passengers;
  - The ease of getting a seat on the bus;
  - Bus stops in the city centre; and
  - The speed of the bus service.
- 4.23 Areas of middling satisfaction (60%-80%) were:
- Passengers' interaction with bus drivers/ hosts/ park and ride site supervisors;
  - Service reliability;
  - Condition/ cleanliness of the outside of the bus;
  - Service frequency; and
  - Information about the bus service.
- 4.24 As with the TalkAbout survey, it can be seen that some important aspects of the bus service only get middling satisfaction ratings (e.g. reliability, frequency, driver interaction, information) whilst one of the most important attributes scores poorly in both the TalkAbout and Bus User surveys (fares/ cost of using buses). Of the attributes which score well, some (e.g. bus stops in the city centre) are delivered by City of York Council, whilst others (e.g. cleanliness of the inside of the buses) are delivered by the operators. This implies that both operators and authority are able to deliver aspects of services to a high standard where required.
- 4.25 Some of the scores bus users have given for individual attributes have been, if not surprising, then perhaps unexpected. Service reliability and service speeds are both perceived to be poor in York, because of the effect of high congestion levels in the city centre on bus speeds through it, and because high congestion can cause unreliable journey times. However, bus users appear to be relatively satisfied with both of these service attributes.



### How do the operators compare with one another?

- 4.26 Figure 4.14 shows the average satisfaction score for each operator in the city. Operators are not named on the chart (except for operator 9, which is CYC's franchised park and ride service, operated by Firstgroup – Firstgroup's other services are shown with a different bar).

**Figure 4.14: Passenger satisfaction with Individual Operators**



- 4.27 As can be seen, there is substantial variation in individual operator scores, with the best operators scoring around 80% satisfaction, and the worst operator scoring just over 60%. The park and ride service (operator 9) is near the top of the satisfaction ratings for the group. There is no trend in satisfaction with services according to whether they are mainly in urban York (e.g. Transdev York, First, Park and Ride, Transdev Pullman) or on interurban routes (e.g. Reliance, Coastliner, Stephenson's, Arriva, EYMS), with both types of service in the city having operators with high and low satisfaction scores. This would seem to indicate that, despite challenging operating conditions in York, they are not an absolute barrier to an operator achieving a high level of customer satisfaction.
- 4.28 In light of this, it is concerning that there is such substantial variation between the operators in the city, with the implication that those operators who are at the bottom of the sample need (and are able) to improve their service offer so that they can offer bus services which are nearer the best in class standards, and that it is in their gift to do this because operators with similar services to theirs' are already achieving significantly higher satisfaction scores.

*Conclusion: Talkabout and Bus User Surveys*



- 4.29 The Talkabout survey differs from the on-bus survey in the sense that it is household based and is therefore a more effective tool at capturing non-bus users (not captured at all by the on-bus survey) and infrequent bus users (lower representation in the sample).
- 4.30 However, there appears to be a high correlation between the concerns of the TalkAbout respondents and those of the bus users (accepting that there is an overlap between these groups) with dissatisfaction focusing on fares levels and provision of evening and weekend services. Areas of satisfaction are also similar.
- 4.31 The TalkAbout survey particularly suggests that the vast majority of York residents are already bus users, even if infrequently – only 16% of respondents said they never used the bus. Thus there appear to be only a relatively small proportion of people in York who would never consider using the bus – with the implication that increasing bus use in the city is more likely to be through encouraging existing bus users to use the bus for a greater proportion of their journeys, rather than attracting non-users to use the bus. This has the further implication that, if most people use the bus at least a little, they must be familiar with the general characteristics of the bus network (e.g. their nearest bus stop, where the buses go, approximate frequencies, fare levels) and are currently making reasonably informed choices. Therefore initiatives to improve the bus service in York should focus on things which would make people use the bus more (for example, making multi-trip fares better value for money, making vehicles more attractive places to spend time, or improving evening and Sunday services to encourage more leisure use of bus services – perhaps as a gateway to encouraging people to use the bus for more of their shopping/ work trips), as these are more likely to be successful than initiatives which tempt non-users into the bus for the first time.
- 4.32 The fact that bus users in York appear to be distributed fairly evenly over all social groups suggests that the market for bus use in York is not as reliant on “traditional” bus users in social groups C2, D and E as it is perhaps in other towns and cities. The relatively high levels of use by social groups A and B suggests that a substantial proportion of bus users in the city have access to a car (or at least are financially capable of car ownership) and are therefore more likely to be trading the characteristics of a bus trip against a car trip. As such, they will place a high value on reliability, punctuality and soft factors such as vehicle comfort.
- 4.33 York’s park and ride is designed, of course, to appeal to people who have access to a car and value high service frequencies and fast journey times, and the on-bus surveys show that park and ride services are consistently given a better score for quality of service attributes than many conventional stage services. However, Figure 4.9 shows that the vast majority of York resident bus users (assessed through the TalkAbout questionnaire) make their choice on the basis of convenience and do not have an absolute preference for park and ride. As such there would appear to be real potential for stage services to enjoy similar success to park and ride in the right circumstances.

### *What people think of buses in York compared to the benchmarking?*

4.34 Taken in totality, the benchmarking against other towns and cities and TalkAbout/ Bus User surveys tell us an interesting story, specifically:

- That although fares in York are perceived to be a source of significant dissatisfaction amongst York residents (including bus users) (Figures 4.2 and 4.11), they are about average for York's comparator towns and cities (Figures 3.4 and 3.5). This either implies that bus passengers in other places also perceive that they get poor value for money from fares (and there is substantial evidence that they do<sup>31</sup>), or that the offer in York is perceived to be particularly poor in this regard;
- Evening and Sunday services are perceived to be poor (Figures 4.6 and 4.12), and it does appear to be the case that buses in York start later in the morning than in comparator towns and cities, and that services ramp up to their daytime frequency relatively late in the day and ramp down relatively early (Table 3.1). However, there is a low absolute level of expenditure in York on supported services (Figure 3.9) – and increasing it would help to provide better services levels at the shoulders of the peak;
- Reliability is perceived as a problem by the Council and operators, but members of the Talkabout panel and people who filled in the on-bus surveys appear to be relatively satisfied with reliability (Figures 4.6 and 4.12);
- Most people seem to find stops and shelters around the city to be of an acceptable quality (Figures 4.3 and 4.13), although there is substantial support for a bus station in York, which would give better interchange facilities (Figure 4.9);
- The on-bus survey suggests that there is significant variation in the perceived quality of the various operators in the city (Figure 4.14). The TalkAbout panel results show that there are clearly dominant operators in the city, with, for example, 85% of bus passengers using First's services. Obviously, there is an onus on ensuring that the operators who carry the most passengers set the highest quality benchmarks for the network, as they will affect the largest number of passengers and have the greatest potential for generating new trip making by bus.

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<sup>31</sup> For example, Passenger Focus's most recent set of bus passenger surveys.

## 5 Integration

### *Introduction*

5.1 Figure 3.7 (see earlier) shows that York has an unusually fragmented bus network for a city of its size, with 8 bus operators providing services in the city at a more than two-hourly frequency, and services on many corridors provided by more than one operator (for example, First and Coastliner on Tadcaster Road, First and Arriva on Fulford Road, First and Coastliner on Heslington Road), and only a relatively small proportion of services in the city provided by the largest operator, First. At a workshop early in this study, conducted with staff from the Council's Sustainable Transport Service, it was commented that this may have a number of effects:

- On many corridors passengers would be able to see a substantial increase in their effective service frequency if they could buy a reasonably priced multi-operator ticket which allowed them to use any bus service in the city. This would act to increase patronage on the city's bus network;
- A multi-operator ticket would also assist passengers undertaking journeys (e.g. across the city) which use more than one bus operator, or travelling on one of the routes in York where different operators provide daytime and evening services;
- On some corridors the levels of competition seen may be leading to "overbussing" where more capacity is being provided than is required to move the passengers who travel by bus. Although high service frequencies encourage passengers to travel by bus, the number of bus movements created may cause particular issues in York where congestion is high in the city centre, there is limited space to provide bus stops and stands and air quality can be poor;
- If there is significant overbussing on certain corridors/ routes in York, then it may be possible to make operating cost savings on the network by reducing the number of buses in operation.

5.2 Accordingly, in the TalkAbout questionnaire (Figure 4.9), one third of respondents agreed with the statement “there are too many buses in the centre of York”, suggesting that a sizeable minority of the city’s population also have a concern about the number of buses in the city centre.

5.3 If there was a case for doing so, it would be possible for the city council to pursue a policy of service integration through a quality contract, or perhaps even a statutory quality partnership<sup>32</sup>, which would rationalise services in the city. Features of such a policy could include:

- An integrated ticket which would allow passengers to use any bus in the city to make their journey (similar to the recently launched multi-operator ticket, but at a lower price point);
- Integration of park and ride services and the stage network, so that users on any of the park and ride corridors (e.g. Tadcaster Road) could use any bus to make their journey. All buses would need to have the same stopping patterns to deliver this, however; and
- Integration of stage services with home to school services if there are any services which substantially share routes.

5.4 Consequently, this Section of the report sets out four tests on the city’s bus network which consider:

- Whether any corridors in York appear to have a level of bus provision that is higher than necessary to accommodate normal levels of demand (i.e. they are overbussed);
- The benefits which could be achieved through a multi-operator ticket, but no changes to services;
- The benefits which could be achieved through an integration of park and ride services and stage services; and
- The potential benefits of integration of home to school and stage services.

5.5 All tests consider:

- Operating cost savings (assessed as reduction in the number of bus hours operated);
- Costs or benefits to passengers;
- Effect on service loadings; and
- Change in number of vehicle movements through the centre of York.

5.6 It should be noted that the list of options tested here is not exhaustive and a wider network study would be required to produce an “optimal” network. However, the tests are considered to be illustrative of a representative range of scenarios.

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<sup>32</sup> Assuming operators would agree to this and it could pass the relevant competition tests.

### *Test 1: Overbussed corridors*

5.7 It is possible to identify two types of overbussing on stage services:

- Type 1 overbussing – where two or more operators compete with more or less identical services on a corridor so that service frequency on that corridor is higher than is required to meet the capacity needs of the corridor; and
- Type 2 overbussing – where an operator either floods a corridor with a very frequent bus service to prevent a new operator establishing itself on the corridor, or an operator schedules its services to layover at key stops on the corridor – blocking them and preventing another operator from establishing a new service.

5.8 The two tests were applied to every corridor in York.

5.9 For type 1 overbussing, the only corridor where there is apparent competition between two routes which are largely identical is the Heslington Road corridor between York city centre and the University, where 10 minute frequency services are operated by both First (4) and Unibus (Transdev/ Pullman) 44.

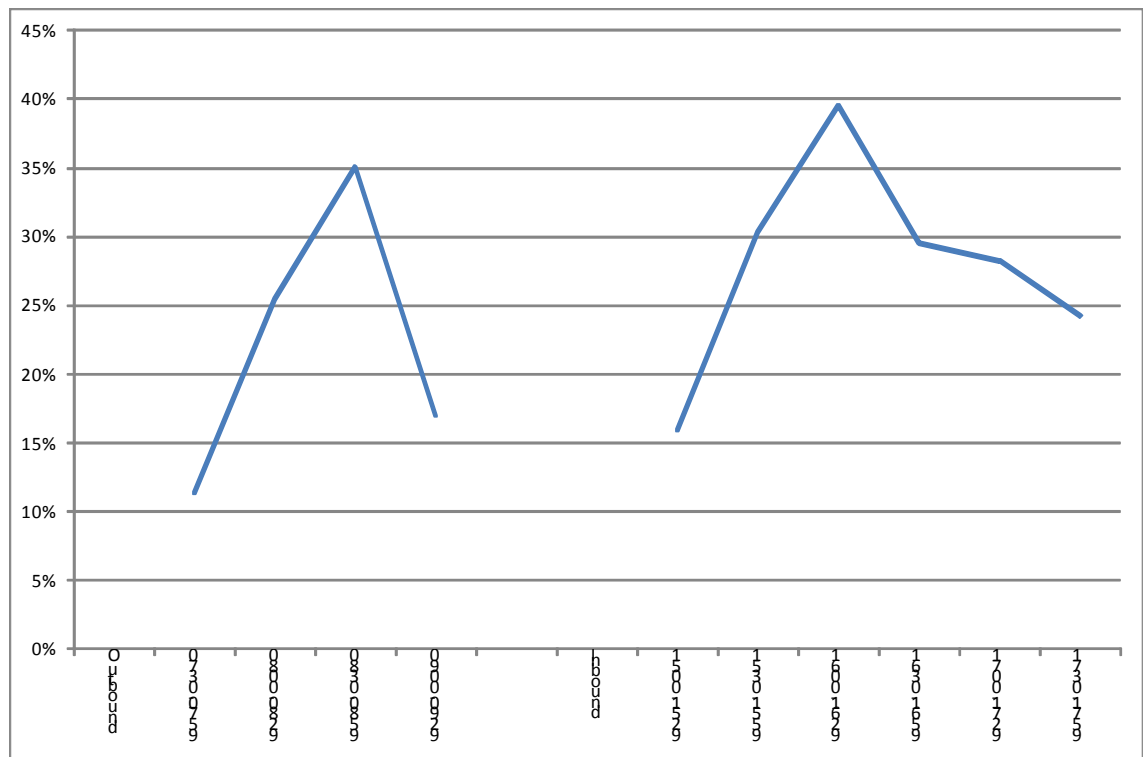
5.10 Survey data on bus occupancy (Figure 5.1) suggests that the number of passengers travelling on Heslington Road does not exceed 40% of available capacity, so could be accommodated on, a 10 minute service (i.e. half of present levels<sup>33</sup>). If this were done it would be possible to reduce the number of vehicles employed on the corridor from 12 to 6, implying an operating cost saving of approximately £720,000 pa<sup>34</sup>. Removing this level of service from the corridor would also reduce the number of bus movements through the city centre by 12 movements per hour (approximately 6% of the current total). Although service levels on the Heslington Road corridor would obviously fall, they would still be the same as the 10 minute services on many other corridors in the city (e.g. Acomb Road, all the park and ride routes), so users would continue to enjoy a reasonably frequent service.

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<sup>33</sup> Since the surveys for this exercise were undertaken, First has increased service levels further on the corridor, with service 4's frequency increasing from every 10 minutes to every 7.5 minutes (October 2012).

<sup>34</sup> Assuming a cost per vehicle year of £120,000 (3000 operated hours @ £40/hour).

**Figure 5.1: Bus Occupancy (%age of seats filled) on Heslington Road**



5.11 It is assessed that none of the corridors in the city has such a frequent service that type 2 overbussing<sup>35</sup> appears to be taking place.

*Test 2: Multi-operator ticket (park and ride corridors)*

5.12 Test 2 considered the effect of introducing an affordable multi-operator ticket on services across the city, but with no changes to service patterns or frequencies. Tests of the costs and benefits of this ticket were made using a spreadsheet model which represented the time and fare costs for users of the services on four of the park and ride corridors in the city (with a worked example as Appendix A of this report). In the test it was assumed:

- A multi-operator ticket would be priced at £3.10 for one day's travel, approximately half way between the park and ride return ticket price (£2.40 as at March 2012) and the current First DayRider price (£3.70).;
- It would allow travel on any bus service in York, including those going across the boundary into North Yorkshire (e.g. Coastliner), but would only be valid within the CYC boundary;

<sup>35</sup> For example, no corridor has a single operator service frequency greater than one bus every 8 minutes (Designer Outlet park and ride). For stage services, no service operates more frequently than every 10 minutes.



- Park and ride services would be remodelled to give them the same characteristics as stage services operating on the same corridor (i.e. they would stop at all stops on the corridor, incurring a journey time penalty for doing so). However, the frequency of park and ride services would be unchanged. They would also wait to pick up passengers at the park and ride site as they do now; and
- Stage services which currently go past the park and ride site would be rerouted to call at the site and pick up/ set down passengers there (incurring a two minute penalty for doing so).

5.13 As such, users would benefit from the multi-operator ticket because:

- It allowed them to travel on any service – so reducing wait times because more services on a corridor were available to any given passenger;
- The ticket price was reduced for stage service users, because it was assumed the multi-operator ticket would be priced at a point midway between the current stage and park and ride tickets (effectively functioning as a mechanism to cross-subsidise stage services from park and ride revenue – although this, of course, increases costs to park and ride users, and would require a back office function to be established to apportion revenue between the different operators).

## Result

5.14 Table 5.1 shows the results of the test.

**Table 5.1: Benefits of an affordable inter-operator ticket and limited service integration on park and ride corridors.**

Corridor	Existing service (buses per hour in each direction)		Proposed integrated stage and park and ride service	Change in users costs <sup>36</sup> (k)	Corridor patronage gain
	Stage	P&R	Merged service		
Tad. Rd	8	6	14	-£464	+5%
Shipton Rd	3	6	9	-£198	+5%
Fulford Rd	5	8	13	-£180	+4%
Hull Rd	5	6	11	-£71	-2%
			<b>TOTAL</b>	<b>-£772</b>	

5.15 It can be seen that passengers on three of the four corridors see a substantial benefit, particularly on Tadcaster Road where users of the stage service see their effective frequency more than doubled. On the Grimston Bar service there is a small disbenefit from:

- Users of the park and ride service (who make up the largest proportion of travelers on the corridor) having a slightly longer journey time (to accommodate additional stops) and slightly higher fare; and
- Users of the services past the park and ride site having a slightly longer journey time as the service diverts into the site (getting a 2 minute penalty).

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<sup>36</sup> This is expressed in terms of generalised cost which is a measure of both the time and money costs of making a journey. Time costs are assessed at £5.93 per hour which is a DfT recommended value of non-working time (this value represents the 2002 value so that assessments can be made on a common basis with other values (also at 2002 prices) such as carbon reduction, decongestion etc within the DfT's webtag guidance).

- 5.16 The cost of introducing the ticket is assumed to be neutral, but a more detailed study would be required to determine the precise value for the ticket in accordance with the Competition Commission's guidance on multi-operator tickets. The test also does not consider the benefits of introducing a multi-operator ticket on corridors off the park and ride network which are served by more than one operator – for example Acomb Road (VeoliaTransdev and First) and Boroughbridge Road (First, Eddie Brown and Harrogate Coach Travel), where there would also be user benefits. It also does not consider benefits to interchanging passengers.
- 5.17 There are also a range of benefits which have not been assessed using the spreadsheet model prepared for this study – principally because they are second or third order effects (i.e. changes delivered indirectly as a result of the changes to service patterns) and cannot be assessed effectively using a limited scope spreadsheet model (although it might be possible to assess them using network models or economic models). These costs and benefits are:
- 5.18 Benefits:
- Improved perception of service quality for current stage service users on corridors where quality of current stage services is worse than quality of park and ride services;
  - Passengers using the service as a park and ride would enjoy a greater choice of destinations in the city centre, as stage services reach a number of locations not currently on the park and ride routes (e.g. Grimston Bar would gain a service to the rail station using the EYMS routes);
  - Park and ride passengers will also be able to travel cross-city (e.g. from Askham Bar to employment at Monks Cross (e.g. using service 13/13A))<sup>37</sup>.
- 5.19 Costs:
- Perceived reduction in service quality amongst current park and ride service users on corridors where quality of current stage services is worse than quality of park and ride services;
  - Carbon emissions, additional congestion and accidents from new car trips into York by users transferring from park and ride because of reduction in park and ride service quality/ increase in costs;
  - Costs of renegotiating current contracts with First which assume exclusive access to the park and ride sites (although this could be mitigated by waiting until the operating contracts is due for renewal in 2014, although with the option of a three year extension).

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<sup>37</sup> Changes to the network being considered by First may sever this link from October 2012.

5.20 **Conclusion:** There would therefore appear to be substantial benefits from reducing the price point of the multi-operator ticket and integrating park and ride and stage services so that they both offer the same stopping pattern, although this would involve significant cost in renegotiating the existing exclusivity agreement with First). However, making the change could be expected to lead to a patronage increase of 4-5% on 3 of the 4 park and ride corridors where there are parallel stage carriage bus services. On the Grimston Bar corridor, however, there would be an overall cost and patronage may fall by 2%.

*Test 3: Integration of park and ride and stage services (reducing service to current effective frequencies)*

- 5.21 Test 3 considered if it was possible to save operating costs on the corridors by:
- Applying the rules used in test 2; but also
  - Reducing services levels on the park and ride corridor so that the service level on the corridor was the same as that enjoyed by the holder of a ticket valid on the most frequent bus routes currently (for example, on Fulford Road, the park and ride service was reduced so that passengers had the same service frequency as now, but with Arriva services allowing access to the park and ride site instead of the dedicated service, so requiring fewer buses overall).
- 5.22 To maintain the argument flow in this paper the methodology and assumptions for the test are not described in detail, but a worked example of the test is described in Appendix C of this report.

*Result*

5.23 The test was run for all of the corridors with an existing park and ride service and parallel stage services. As such, the Monks Cross service was excluded as it is a unique service on much of its route. The test also did not consider the A59 Boroughbridge Road corridor, where a park and ride service is to be introduced. Table 5.2 shows the result of the model.

**Table 5.2: Modelled Results**

Corridor	Existing service (buses per hour in each direction)		Proposed integrated stage and park and ride service		Change in service operating cost <sup>38</sup> (£k)	Change in users costs (£k)	Change in vehicle movements across city centre <sup>39</sup>
	Stage	P&R	Stage	P&R			
Tad. Rd	8	6	8	0	-450	+198	-12
Shipton Rd	3	6	3	3	-270	+9	-6
Fulford Rd	5	8	5	3	-360	-31	-6
Hull Rd	5	6	5	1	-360	+267	-10
				<b>TOTAL</b>	<b>-1,440</b>	<b>+443</b>	<b>-34</b>

5.24 As can be seen, the model results for the test appear to demonstrate that it would be possible to make significant savings in both operating costs and the number of vehicle movements across the centre of York by integrating park and ride services into the stage network. This would also give other benefits of:

- Air quality improvements in York City Centre (fewer buses travelling through the city centre);
- Reduced carbon emissions from buses; and
- Improved stand availability in the city centre (fewer buses calling there).

5.25 However, it can also be seen that costs for service users increase on three of the four corridors because:

- Users who board buses outward of the park and ride site (e.g. at Copmanthorpe) for travel into the city centre suffer a 2 minute penalty as the bus is diverted off the main route to serve the site (something it does not currently do);

<sup>38</sup> Assumes buses operate 3,000 hours per year at £40/hour, discounted back to 2002 values.

<sup>39</sup> Buses per hour

- Park and ride users have to wait at the shelter at the terminal, rather than on the bus, and, as such, their waiting time incurs a penalty<sup>40</sup>, and they also incur penalties because journey times increase (their buses make intermediate stops which they do not currently make) and fares increase (it is assumed that a common ticket would be priced mid-way between the current stage and park and ride ticket);
- Benefits to users of stage services are generally not great enough to offset these costs.

5.26 Therefore, it can be seen that, whilst it is feasible to fully integrate stage and park and ride services, and there are some operating cost savings from doing so, it would lead to an overall increase in passengers' costs for travel for three of the four sites (and only a marginal benefit at the other site).

5.27 **Conclusion:** In general, test 3 paints an attractive picture only in terms of its scope for reducing operating costs and vehicle movements through the city centre. Although it demonstrates that it would be possible to make substantial operating cost savings by integrating park and ride and stage services, this would clearly be at a significant cost to service users on the corridor, particularly of the park and ride services. Given park and ride's position as a central component of York's transport strategy, and the high value of the decongestion benefits which it delivers, this would seem to be contrary to CYC's objectives for transport.

#### *Test 4: Home to School Services*

- 5.28 A list of home to school was obtained from Education Services. This is attached in Appendix C.
- 5.29 A comparison of the routes for home to school services with existing stage-carriage routes revealed that there was little overlap with most home to school services following orbital/ rural routes quite different to those provided by the stage network.
- 5.30 Therefore it is concluded that there is no scope for delivering operating cost savings through improving integration of home to school and stagecarriage services above what is currently achieved.

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<sup>40</sup> Typically wait time on vehicles is assessed as having the same value as "in vehicle time" i.e. time spent travelling because the traveler is warm, inside the bus and confident that the service is operating. Wait time at stands is typically weighted by 2.

### *Conclusions on Integration*

- 5.31 The consideration of integration benefits made above suggests that substantial passenger benefits could be unlocked in York through delivering a reasonably priced multi-operator ticket in the city. This would involve some cross-subsidy between the current park and ride service and stage services and the ticket would need to be sold at a lower price point than the £5.00 (£4.50 initial price) multi-operator ticket which is currently available in York.
- 5.32 It is recommended that CYC consider what an ideal price point is for a multi-operator ticket and discuss options with local bus companies going forwards. If local operators agree to the implementation of such a ticket then CYC will need to consider whether it is appropriate to implement the ticket through qualifying agreements between the companies.
- 5.33 The option which involved greater integration between park and ride and stage services does not appear to be particularly attractive, and there appear to be no potential benefits from greater integration of home to school and stage services.
- 5.34 The option testing here is not exhaustive and it is recommended that further tests take place to determine whether there is a more optimal service pattern than that specified in Test 2 – for example involving running park and ride services between different sites though the city centre. Other forms of service complementing conventional stage carriage services might also be considered as well as the coverage of the current network of services. This could be within the context of a general review of the York bus network taking account of future developments.

## 6 The York Quality Bus Partnership

### *Introduction*

6.1 This section of the report summarises a governance review of the existing York QBP by the TAS Partnership. Recommendations as to how the partnership can be developed have been formulated by JRTP as part of the Bus Improvement Study.

6.2 The TAS Partnership Limited (TAS) was commissioned by City of York Council (CYC) to review the development of the Quality Bus Partnership (QBP) scheme in York.

6.3 The objectives of TAS's review were as follows:

- To review the terms of reference of the current York QBP against 'good practice' from similar partnership schemes in the UK;
- Assess whether the current QBP membership supports its structure and responsibilities, or would prefer a change of focus or format;
- Capture and summarise the individual concerns, if any, of members and other stakeholders involved in the York QBP;
- Ascertain the level of aspiration amongst partnership members to increase bus patronage in York and to determine the extent to which QBP members believe that the partnership has collective responsibility for development and growth within the local bus market;
- Identify perceived barriers to the effective delivery of partnership schemes and projects; and
- Take into account current consensus regarding the role of partnerships given the range of alternative options (i.e. voluntary and formal approaches).

6.4 Subsequent to this, JRTP has considered how the QBP can be developed to deliver operators' and CYC's aspiration to increase bus patronage. This has included a consideration of how York could use Statutory Quality Bus Partnerships (SQBPs) (under which operators (if they agree to do so) can be statutorily required to provide services of a particular quality in order to use a piece of new infrastructure (such as some of the measures to be provided under the BBAF project) and Qualifying Agreements (QAs) (under which operators could co-ordinate ticketing products, timetables or investment plans (with CYC acting as honest broker)). TAS's report was an input into these considerations.

### *TAS Approach*

6.5 TAS's review consisted of three primary tasks:

- 1: A consideration of 'Good Practice' within bus partnerships and an assessment of the current York scheme against the good practice criteria;
- 2: A consultation of York QBP members, including senior managers from UK bus operators; and



- 3: Comparison of the York scheme with other UK QBPs in areas with similar bus operating characteristics.

6.6 Throughout the progress of each task, stakeholders from the council, the bus operators and other QBP members were actively and positively engaged in the review process.

### *QBP Good Practice and Assessment of York Scheme*

6.7 This involved an objective assessment of all aspects of the current York QBP scheme against three broad criteria identified by TAS in previous 'good practice' assessments of quality bus partnerships, provided alongside this report as a companion report<sup>41</sup>.

6.8 The three broad criteria against which the YQBP was evaluated include:

- Planning and initiation;
- Implementation and delivery; and
- Monitoring and development.

### *Initial Findings*

6.9 TAS's initial findings suggest that:

- The current York partnership originates from 2001 with a subsequent relaunch in 2007. The objectives of the partnership are captured in the terms of reference documentation:  
*"...to encourage greater use of public transport in and around York to reduce problems caused by traffic congestion, to improve the environment and to meet the social need for transport".*
- The Terms of Reference (ToR) and Heads of Terms (HoT) documents provide a reasonable outline of the partnership, its purpose and its stated objectives, but there is a mix of different objectives and overlap between the two documents. There is therefore a need to update both documents, and ensure that the revised documents express the ambitions of the partners;
- Supplementary documents include minutes of partnership meetings and the Annual Action Plan, but the last copy of the Annual Plan appears to originate from 2008/09. There is a need to update this document, particularly to reflect CYC's changing political priorities and the availability of significant project funding through BBAF and i-travel York;
- The partnership consists of a series of separately signed agreements between individual operators and CYC, which also need to be updated to reflect current operating conditions;
- The partnership is well-represented from both the local authority and bus and coach operators, although membership could be extended to other parties with transport interests (including NHS, community transport, rail and taxi/PHV representatives for example);
- The outputs from the partnership are less well supported and defined. Whilst the partnership refers to the need for quantitative analysis, there is no supporting evidence for:

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<sup>41</sup> Available on request.

- Performance and goal-setting, for example the use of Key Performance Indicators to establish projects and monitor progress;
  - Revenue and/or capital expenditure for projects or the partnership (other than reference to members' budget resources and complementary projects e.g. the Local Sustainable Transport Fund); and
  - Risk assessment or other partnership management tools, for example cost-benefit analysis of partnership projects.
- 6.10 TAS noted that the initial focus for the partnership has been clearly to address reliability concerns and those of traffic congestion. However there is no direct evidence from any of the partnership forums or sub-groups that environmental and social needs are being actively addressed and as such TAS recommend these should be pursued in the next phase of partnership development.

### *Partnership Members Survey*

- 6.11 This involved an informal survey of YQBP members regarding five common elements regarding the current York QBP:
- Performance;
  - Organisation;
  - Importance;
  - Future; and
  - Patronage Growth
- 6.12 A SWOT Analysis of the current and potential options for the partnership was distilled from members' feedback.

**Table 6.1: Current Strengths, Weaknesses, Opportunities and Threats: York QBP**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>■ Partnership agreement and administration (including Terms of Reference and Heads of Terms)</li> <li>■ All partners see inherent value in bringing public transport stakeholders together as well as QBP business being worthwhile</li> <li>■ The partnership is seen as pivotal amongst members for driving patronage growth. Operators are keen for growth.</li> <li>■ Forum encourages dialogue between partners without any Competition Law considerations</li> <li>■ Partners represented by senior management from local authorities and operators</li> <li>■ Partnership has already made significant achievements in ticketing</li> <li>■ Partnership working assisted in recent Better Bus Areas (BBA) bid success and will bolster collective efforts of partners</li> <li>■ The Performance Sub-Group is seen as particularly effective</li> </ul>	<ul style="list-style-type: none"> <li>■ Lack of resources and defined objectives that are seen as barriers to effective implementation of projects and schemes</li> <li>■ Many outcomes from projects and schemes cannot be quantified and thus there is no indicator of intervention success or failure</li> <li>■ Varying opinion regarding patronage growth which dilutes focus e.g. Park &amp; Ride vs. local bus vs. inter-urban service investment</li> <li>■ The administration of meetings requires more focus – minutes and agendas are often late, no updates to annual action plan</li> <li>■ No perceived local bus management from major operators to focus on local issues</li> <li>■ Whilst the partnership membership is diverse, there is no presence from large employers, including NHS and University</li> <li>■ Decision-making hindered by large group (consensus) and requirement by senior managers to refer to Executive Board</li> <li>■ No local highways authority presence to discuss concerns over reliability (although do attend Performance sub group)</li> <li>■ Some briefing papers ill prepared before presentation to the QBP</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>■ Undertake research to establish baseline of public transport use and customer views against which to measure implementation of interventions</li> <li>■ Establish a clear, strategic programme for the partnership with set objectives and targets to increase effectiveness</li> <li>■ Creation of a small, senior management group (Executive) to speed up decision-making processes</li> <li>■ Involvement of Highways department as required to assist with tackling reliability concerns</li> <li>■ Introduction of quality standards for aspects of service delivery (some operators are working towards this) inc. publicity</li> <li>■ Use of BBA success to improve accountability of the partnership and to improve reporting on project delivery</li> <li>■ Encourage smaller operator working through changing times of meetings and review of service procurement (e.g. Park and Ride)</li> <li>■ QBP could take lead in initiatives to develop understanding of local market dynamics (e.g. through commissioning research)</li> </ul>	<ul style="list-style-type: none"> <li>■ Threat of a Quality Contract Scheme (QCS) seen by some members as unhelpful and holding back medium-/long-term decision making</li> <li>■ Expansion of current membership to incorporate other representatives could dilute and hinder decision-making</li> <li>■ The partnership meeting agenda is often focused on local authority priorities and contains the potential for bias</li> <li>■ York is not perceived to be a growing market for the major operators – whilst there is growth aspiration, no evidence of method or understanding of local market dynamics</li> <li>■ BBA fund success must create a difference for passengers' bus services within York otherwise it will be a perceived 'failure'</li> <li>■ No co-ordinated plan to capture operator aspirations and plans, yet little interest in growing the inter-urban market</li> <li>■ No mechanism to force any partner to up their game if there is a serious and on-going quality problem</li> </ul>

- 6.13 As can be seen, the York QBP has a number of inherent strengths including membership base and willingness to develop the 'bus product' for York. However, the current partnership appeared to lack a strategic focus and clarity of purpose.

### *Findings*

- 6.14 Whilst York is not universally viewed as a growing market, most operators see inherent value in the potential of York and accordingly aspire to growth within that market.
- 6.15 A number of reasons for the stagnation of patronage growth in the City were put forward, among them the acceptance by First Group that moving senior management away from York could have contributed to decline. A number of suggestions were made to achieve passenger growth and modal shift and it was a commonly held view that YQBP should lead the way in achieving growth implying that none of the operators see a role for themselves as a champion of growth in bus patronage across York, which is perhaps a reflection of the fact that, unlike in Nottingham, Cambridge or Brighton there is no longer a single operator with a commanding presence in the York urban bus market. Operators do appear, of course, to see a role for themselves in promoting their own services, which could be an important contributor to patronage growth. Overall, there was a view that it is important that a strong and good image is created for public transport in the City to improve public perception of bus travel, with the implication that this could be a task for the QBP if no-one else was willing to do it.
- 6.16 TAS's findings suggest that, at the moment, YQBP serves a useful function in bringing together operators, Council officers and bus users to develop ideas to improve the quality of bus services but it lacks focus and clarity of purpose. There is a clear willingness of all members of YQBP to work together to deliver success in raising the profile and quality of public transport with consequent increase in passenger numbers.

### *UK Case Studies*

- 6.17 This task involved undertaking a succinct survey highlighting the characteristics, membership and reported (or notable) outcomes from six other bus partnerships, in areas which shared a similar bus operating environment to that of York.
- 6.18 TAS's findings from the case studies were as follows:
- Most of the Quality Bus Partnership schemes have been in place for over five years;
  - The schemes all involve partnerships between the local authorities in the area in which the scheme operates (including Shire and District councils where appropriate) and the principal UK bus operating groups, notably Arriva, First, Go-Ahead and Stagecoach. In most cases there is a clear dominant local operator;
  - Most partnerships consist of local authority and bus operator representatives as core constituents. Other than perhaps the Slough

scheme, only York has a cross-sectional membership including community and user group representatives;

- All schemes involve formal, signed agreements with Council and operator partners;
- Where schemes have ended or are due for imminent expiry, there are discussions in place amongst partners to extend the schemes;
- Most of the schemes focus on the following stated objectives:
  - Increased bus use and bus patronage over the period of the scheme;
  - The principle of achieving modal shift from car to bus (specifically in high-profile areas such as Brighton, Cambridge and Oxford); and
  - Increased social inclusion and accessibility to high quality bus services – this has tended to involve investment in low floor, low emission vehicles (more recently funded through the DfT Green Bus Fund) and investment in at-stop infrastructure (reference to Kickstart, now Better Bus Area funding, to provide some capital support for such schemes).

### *Refining the Partnership*

6.19 Subsequent to the presentation of their report on the York QBP, TAS have published a research paper on bus partnership<sup>42</sup>. Without further research, the paper is largely inconclusive about the socio-demographic ingredients for really successful bus partnership, noting that areas with similar geography see differing outcomes in developing their bus networks. However, it is able to make some tentative suggestions which are worthwhile to repeat here.

- 6.20 The report suggests that there are essentially three types of partnership:
- Those which are a mechanism for enacting a transport policy or business tool to grow patronage;
  - Those which act as an umbrella relationship between partners (a process framework for consultation); and
  - Those which seek to develop a particularly product or manage an investment (e.g. an upgraded route).

Taking these definitions, it would seem reasonable to suggest that the role of the York QBP at its first inception in 2001 was the first of these – to grow patronage. More recently its set up has born most resemblance to the second category – as an umbrella organisation for stakeholders involved with buses in York. In future, CYC’s renewed emphasis on patronage growth and political commitment to a single, integrated “York” bus service (from the customers’ point of view) suggests a move back to the first category – as a business tool to grow patronage, and the BBAF project suggests that the QBP now has a role in the third category – to develop a product, which in this case is delivery of the BBAF project.

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<sup>42</sup> Making Buses Better, TAS Policy Exchange 2012.

- 6.21 TAS's report suggests that low cost upgrades made through a QBP might induce patronage growth of around 5%, whilst comprehensive route upgrades might achieve 20% growth, one third of which could be expected to come from trips which previously took place by car. Whilst it identifies a number of partnerships which have done well at growing patronage, it does not identify any partnerships which have, on their inception, reversed a prior trend of declining patronage, although this is not to say that such QBPs do not exist. However, it is clear that many partnerships have acted to formalise existing constructive and successful joint working between authorities and operators, rather than starting from first principles.
- 6.22 The report also sets out that partnership failure is not uncommon, and outlines five potential sources of failure:
- "Intractable" failures, where the partners fail to reach agreement on the objectives of the scheme, or a partner realises they are unable to deliver an aspect of the partnership;
  - "Failures of trust" – where a local authority perceives a bus operator to have undermined the partnership (e.g. through a service change) or a bus operator perceives that a local authority has not delivered its commitments (e.g. a priority scheme);
  - "External" failures – e.g. a competing low cost service is registered on a QBP corridor, or there is a change of political control of an authority leading to a bus priority measure being removed;
  - "Communications failures" – e.g. partners unsure of each other's objectives, constraints and timescales for action; and
  - "inactivity" – one party moves to invest on a slower timescale than the other partner.
- 6.23 The report concludes that the evidence shows "operator strategies have greater immediate influence on success" with "long term improvements... achieved by local authority initiatives" and "Both sides working together in a co-ordinated fashion through the QBP delivers benefits to passengers and communities that are greater than the sum of the parts".
- 6.24 The report then suggests that the organisational components of a potentially successful QBP policy are:
- A zero tolerance approach for **illegal parking** on bus routes;
  - **Active parking policy** to help promote modal switch to bus;
  - bus boarders not laybys – **infrastructure to deliver accessibility** and reliability;
  - improved **queue management** to improve reliability;
  - Good **control of streetworks**;
  - Maintenance and **enhancement of information**;
  - **Smart ticketing** to reduce boarding and waiting times;
  - **Attractive and frequent networks** which adapt to changing market conditions and provide services at times people want to use them;
  - **Active service management** to deliver reliability and high customer satisfaction; and

- **Active policies to promote the bus** and make the case to communities and politicians alike.

6.25 Table 6.2 (overleaf) considers TAS's recommended policies for a successful QBP against the prevailing situation in York. Where judgements have been made these are based on either information collected by TAS in their consultation with members of the QBP, or from the Bus Improvement Study's data collection summarised in Sections 3 and 4 of this report.



**Table 6.2: Assessment of policies and situation on York.**

<b>Policy</b>	<b>Controlled by:</b>	<b>York QBP now</b>	<b>York QBP post BBAF project</b>	<b>Notes</b>
Illegal parking problems	CYC	Mostly good, but problems with (legally) loading vehicles	Good	No problems noted in TAS's consultation (although CYC's perception is that there can be problems with this). Employment of bus wardens through BBAF will lead to an improvement in enforcing against illegal parking. ANPR cameras will also help enforce bus only streets.
Active parking policy	CYC	Mixed	Better	York has relatively high parking charges, set to bring about modal shift.
(stop) Infrastructure for reliability	CYC	Some poor quality infrastructure, some bus on bus congestion at some stops.	Good	York's infrastructure has been identified as poor in the past. BBAF contains funds of c. £2m to improve passenger infrastructure in York
Queue management	CYC	Poor	Better	Bus reliability in York poor but BBAF includes funds for two stretches of bus lanes and new sections of bus only street. NI shows an improving trend.
Control of streetworks	CYC	Has improved recently	Good	Recent improvements in procedures. No issue raised during TAS's consultation.

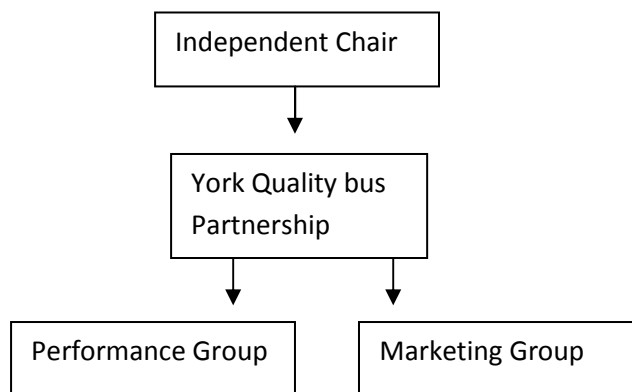
<b>Policy</b>	<b>Controlled by:</b>	<b>York QBP now</b>	<b>York QBP post BBAF project</b>	<b>Notes</b>
Enhancements to information	Operators	Poor	Good	CYC taking provision in-house. Performance of RTI system varies between operators but is being addressed.
Smart ticketing	Operators	Park and ride only (not to ITSO)	Good	Will be available on all services through operator investment and BBAF grant, although there are issues around price.
Attractive/frequent network	Operators	Varies by operator	Not known, not in BBAF control	Performance varies by operators (see S4). Operators do not appear to have clear plans for remedying deficiencies have been identified by this study.
Active service management	Operators	Varies by operator	Not known, not in BBAF control	Performance varies by operator. Some operators in York appear to have more effective and robust systems than others. FirstGroup appear to have recently reduced inspectors in York.
Promotion policies	Operators	Varies by operator	Not known	Transdev have a variety of special offers/ promotions, but promotional work by other groups varies, with some making few York-focussed promotions. Transdev also have York focussed Business Development staff whilst FirstGroup have a regional structure (which in York replaced locally based staff). BBAF has a significant budget for promoting bus services in York. This offers a solution for the next two years, but is clearly not a long term solution for CYC.



- 6.26 Therefore, TAS's characteristics can be categorised into three groups:
- Good characteristics currently exhibited by York, where no (or relatively minor) improvement action is required. These are:
    - Active parking policy
    - Control of streetworks (assuming that information collected by TAS is representative of opinion)
  - Characteristics which are currently poor, but where BBAF (or other initiatives) has a clear action plan which will lead to improvement. These are:
    - Illegal parking problems
    - Infrastructure
    - Queue management
    - Enhancement of information
    - Smart ticketing (delivery if not pricing)
  - Characteristics which are currently poor, as evidenced by this study, where no party has currently identified a clear rectification strategy. These are:
    - The underlying attractiveness and frequency of the network – the on bus surveys undertaken as part of this study shows that customer perceptions vary markedly between operators with some notably poor performers;
    - Active service management – whilst some operators actively manage their services there is little evidence that all do this and one operator has recently reduced resources for this in York;
    - Promotion – whilst some operators in York are good at this, there is very little evidence of pro-active marketing activity by a number of the city's operators.

### *Implementation and Structures*

- 6.27 Use of a partnership based structure to remedy the shortcomings identified above implies significant change to the existing Partnership, the structure of which is shown in Figure 6.1 (over):

**Figure 6.1: Existing QBP Structure**

- 6.28 As such, there is clearly a need to devise structures to:
- Deliver the improvements which the BBAF project seeks to provide;
  - Remedy underlying problems with the attractiveness of some operators' networks in York;
  - Improve promotion of bus services in York; and
  - Ingrain a better culture of active service management at some operators so that reliability can be improved (benefiting also from the infrastructure improvements delivered through the BBAF project).
- 6.29 TAS recommend the establishment of "Task and Finish" groups to tackle clearly defined tasks (for example, "developing a marketing campaign for buses in York") and this report concurs that this is probably the most effective way to achieve better marketing and promotion of services in the city (under the QBP). It is recommended that such a group is established to devise a city-wide promotional campaign, which can be funded from the £600,000 marketing budget within BBAF. Other task and finish groups could be formed to direct, for example:
- infrastructure investment (e.g. stops/ shelters and interchange points) funded by BBAF/ LTP;
  - York's smart ticketing scheme;
  - Bus priority schemes delivered through BBAF/ LTP.

- 6.30 TAS also recommend that the independent chair of the QBP is retained but that membership of the main group is widened to include large local employers, other public transport modes such as train and taxi operators and passenger representative groups (e.g. formal representation from Bus Users UK). This report agrees with the recommendation, but assesses that widening membership of the QBP will make it harder, not easier, for the group to make decisions, because more stakeholders will be involved in the decision making process. It is therefore recommended that the “main” QBP moves from a primarily decision making role to a consultative role. In cases where a collective decision by operators is required (e.g. about ticketing), this could be made through “in private” operator-CYC only meetings, before or after the main QBP. The Independent Chair would chair both groups.
- 6.31 TAS recommend that an “Executive Group” is formed of the large operators in York (First, Arriva and Transdev) as a strategic decision-making body of the QBP. This report rejects that recommendation because:
- Such a group would exclude the smaller operators in York, some of whom have a long standing experience and knowledge of the York market and scored excellent customer satisfaction ratings during this study’s on-bus surveys. They should be given maximum commercial freedom to develop;
  - Competition restrictions could limit the action of such a group;
  - The requirement to improve service quality is not uniform across bus operators in York. To deliver CYC’s aspirations the Executive Group would have to focus on the deficiencies of a subset of companies in front of their commercial competitors. This is neither practical or desirable.
- 6.32 Consequently, it is concluded that addressing the deficiencies in the “attractiveness of service” category is best achieved through a series of bilateral meetings between senior CYC staff and staff at the bus operators. The frequency and focus of these should be defined through CYC-operator agreed “Action Plans”. The willingness of operators to sign up to the plans should be seen as an indication of the operators’ commitment to York as a market and is likely to feed directly into any downstream decision to apply for QCS status in the city. CYC recognise that the direction of travel is not entirely one way – there are many things which the operators wish CYC to improve – but CYC are keen to sign up to address these to play their part in promoting bus services in York.
- 6.33 The move to a more prescriptive approach to bus service provision in York implies a greater dedication of resource at CYC to making the system work. As such, it is recommended that CYC employ a member of staff (or incorporate the tasks into the job descriptions of existing members of staff so that responsibilities are clearly defined) to run the partnership and take ownership of all administrative tasks, co-ordinate the task and finish groups (and their budgets) and formulate operator actions plans – and monitor progress against any relevant targets. This study also accepts a number of other TAS recommendations as to how the group should operate, specifically:
- It should continue to meet 4 times per year;

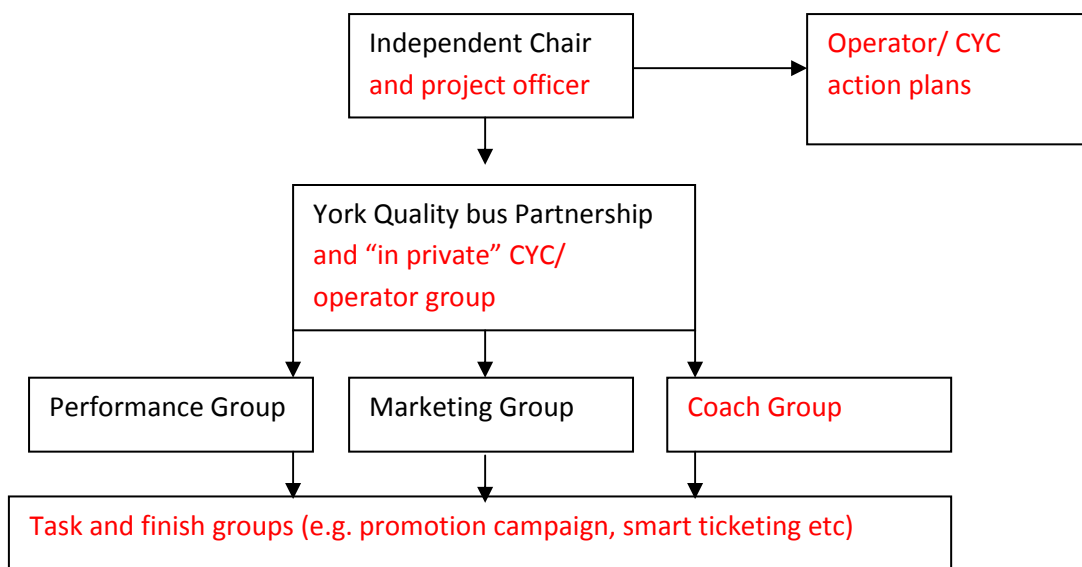
- Key performance indicators (e.g. reliability, patronage, passenger satisfaction) should be prepared and presented to the QBP;
- There should be greater involvement of the Highways department of CYC in the QBP;
- There should be a York protocol for the number of service changes each year; and
- A methodology for customer satisfaction surveys should be agreed, comparable with the national indicators used by Passenger Focus.

6.34 This report also suggests that the QBP should also develop:

- A “Customer Charter” including protocols for handling customer complaints and a compensation policy;
- Driver training standards, including awareness of cyclists (using the budget within the BBAF project to fund delivery); and
- A coach group – to take account of the interests of coaches operating in the city.

6.35 A new structure would need to be developed to deliver these changes, which is shown in figure 6.2 below. Other sub-groups (e.g. ticketing or real time information) could be added as required.

**Figure 6.2: Proposed QBP Structure (new elements in red)**



*Funding*

6.36 Funding for the new QBP Project Officer and, post BBAF, the projects taken forward by the task and finish groups, would need to be agreed between operators and CYC. However, it is anticipated that operators will provide substantial funding if they wish to support the partnership on an ongoing basis. This would include maintenance of jointly provided timetables and other infrastructure provided through the partnership.

### *Voluntary or Statutory?*

- 6.37 TAS recommend that the York QBP remains voluntary. However, this recommendation is made outside the consideration of CYC's aspiration to achieve a step change in bus patronage in the city. Although some operators expressed a regret in TAS's research in York that their actions may have contributed to patronage decline, particularly FirstGroup through their move away from a York based Board to a regional (UK North) management structure, there is limited evidence that any operator in the city plans to radically change the quality of the service it provides to address the concerns of customers expressed during the on-bus surveys undertaken for this project. Whilst this is acceptable for those operators whose quality of service is perceived to be high, it is out of step with CYC's aspirations for the operators whose quality is assessed to be poor (see Section 4).
- 6.38 TAS observe that the existing York QBP exhibits the "foundations of a successful QBP", but given the quality shortcomings of some operators on the network it would appear that there is a need for a robust framework to drive improvements in York as they simply do not seem to be happening, across all operators, via the current voluntary partnership, which has been in existence for 11 years. Additionally, there is a need to protect the substantial BBAF investment from potentially being undermined by a poor quality operator entering the market, or a decline in operating standards in one or more of the existing York companies.
- 6.39 Consequently, this report recommends that, if CYC wishes to continue with a partnership approach in York, it needs to give very serious consideration to use Statutory Quality Partnerships and Qualifying Agreements in York to:
- Improve the age profiles and emissions characteristics of some companies' bus fleets (to improve image and emission levels – could also be tackled through the York Low Emissions Zone);
  - Protect investments made under BBAF;
  - Develop attractive multi-operator ticket products and/ or joint tickets in any quality corridors in the city;
  - Secure ongoing funding for marketing campaigns, QBP staffing and monitoring costs;
  - Co-ordinate timetables on the potentially overbussed route between the city centre and University;
  - Agree a fixed number of service changes each year;
  - Deliver a customer charter for bus passengers in York, including driver training standards in the city;
  - Reach agreements on target service levels (e.g. extent of day time service across the day, relation of evening/ weekend frequencies to daytime frequencies) with operators;
  - Control of stops in York city centre (especially congested areas such as the Station and St Leonard's Place; and
  - Improve integration of less frequent services for effective cross city journeys – especially outside core Monday to Saturday daytime hours.





### *Overall Conclusion on Partnership*

- 6.40 Overall, it is concluded that it is possible to deliver effective change to address poor quality on some bus services in York via a development of the existing partnership, but that this would require very substantial change, and greater resources devoted, to the existing QBP. At this point, the change can be seeded by funds from BBAF (e.g. for promotion), but there is nonetheless a requirement for substantial ongoing funding about which the partners in the QBP would have to agree.
- 6.41 A partnership based solution does, of course, have the benefit that it can be enacted with immediate effect (or with a consultation period for a statutory scheme), as opposed to an 18-24 month hiatus (and possibly longer) for a Quality Contract Scheme. This advantage means that enacting change via the partnership tessellates with the timescale for BBAF – and hopefully benefits from the two could be realised simultaneously.
- 6.42 There is, however, a clear case for putting York’s partnership on a more formal footing to both protect investment made under BBAF and bring forward investment from operators to release some of CYC’s priorities (for example, improving air quality in York city centre by improving the emissions standard of the bus fleet). There is, therefore, a good case for seeking to enact one or a number of statutory bus partnerships in York to assist in delivering CYC’s aspirations for the bus network.

6.43

## 7 Study Conclusions

### *Introduction*

7.1 This section of the report distills the data presented in sections 2-6 of the report into a series of conclusions. Chapter Eight of the report then sets out a series of recommendations for developing the bus network in York to meet CYC's aspirations for patronage growth bringing secondary benefits of mode shift, a higher amenity environment and lower emissions in the city centre.

7.2 As section 1 notes, the study is set around making judgements on the basis of a series of hypotheses which are considered in the light of the data collection and technical exercises reported in sections 2-6.

7.3 The outcome of the process is reported here, in the table below.

**Table 7.1: Study Hypotheses**

Hypothesis	Can it be supported?	Evidence
There are absolute problems with York's bus network	Partly	The benchmarking section (Chapter 3) shows patronage growth in York is flat despite the city bearing many of the characteristics of cities where patronage is increasing. The local supply market can be seen to be exceptionally fragmented with a principal operator with a relatively small market share and a large proportion of the bus market provided by eight other, smaller, operators, all of whom compete with the principal operator to some extent. This fragmentation means that many bus journeys in the city require travel on two operators – either for cross city journeys, journeys from adjacent rural areas to an out of centre York destination (e.g. the University), travel on the corridors served by more than one operator or on services where different operators provide daytime and evening services. As such, the fragmented market imposes additional travel costs on many passengers and can be difficult to use as a single, integrated service without passengers purchasing an All York ticket at a price above all operators operator-specific tickets. Local authority net expenditure on services is low, particularly when the contribution from park and ride is netted out. Non-user and user perceptions (Section 4) focus on views that on many services fares are high, and evening/ Sunday services are poor. Although reliability of services and bus speeds in York are perceived as big problems by operators and CYC, they do not emerge as areas of significant dissatisfaction amongst members of the public – their main impact is increasing the resources required to maintain published timetables. Section 4 also shows that

		<p>there is substantial variance in the perceived performance of operators in the city, with some judged to offer a consistently better service than others. However, the bus user surveys also appear to show that operating buses in the York urban area is not an absolute barrier to high passenger satisfaction, because some operators in York score high satisfaction ratings (for example, on the park and ride service). Section 4 also shows that many bus users in York are likely to have cars available, and it is inferred that these users are likely to be more sensitive to service fares, reliability and service quality than users who are not car available, and are therefore more of a captive market.</p> <p>We therefore judge that, whilst there are (bar fragmentation) few absolute problems with the bus network in York, it is not performing as well as the 3 best bus networks in other towns and cities of a similar size (see section 3 and text below), and that some operators in the city perform well – demonstrating that it is possible to operate satisfactorily in the city. It therefore appears to be the case that:</p> <ul style="list-style-type: none"> <li>▪ CYC has high aspirations to grow bus patronage and deliver an integrated service from the customers' point of view, in York, in line with best practice exemplars across the UK;</li> <li>▪ Some operators in the city are capable of providing high quality services, as evidenced by high user satisfaction scores; but</li> <li>▪ Some operators do not perform so well and a key role for the QBP is to find ways to improve the performance of these operators, because;</li> <li>▪ Many bus passengers in York currently have cars available (or can walk or cycle) and so are likely to change their travel behaviour away from the bus if they perceive it to be of poor quality or value.</li> <li>▪ Further integration issues should be considered, for example whether there is a greater role for Community Transport where or when there is low demand.</li> </ul>
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Hypothesis	Can it be supported?	Evidence
York's bus network is poor compared to other historic towns and cities	Partly	The benchmarking report (Section 3) shows that York's bus network's performance is in the middle of the benchmarking group, so is not poor in absolute terms. It is, however, somewhat below the best practice exemplars such as Cambridge, Oxford and Brighton (where comparisons are possible), with a particular issue with low service levels on the shoulders of the peaks. CYC's aspirations to grow patronage on the bus network (as expressed in the Council Plan and BBAF bid) require York to grow patronage in line with the best practice exemplars. The levels of satisfaction seen in the bus user surveys, particularly the inconsistent quality of different companies' operations in the city, suggests that a significant improvement is needed to deliver the levels of patronage growth the Council wish to see. It is therefore judged that, whilst York's bus network shows performance levels which are in-line with the average, this is not good enough to achieve CYC's policy aspirations, which requires across the board delivery in line with best practice.
Some corridors in York are overbussed	Only one definitive case.	There is evidence (Section 5) that the corridor between the city centre and the University is overbussed.
There are opportunities to improve the viability of the bus network through better co-ordination of stage and park and ride services	Yes	Section 5 suggests that an integrated ticket at an affordable price point would deliver substantial benefit on corridors with both stage and park and ride services. A test where park and ride services were rationalised, and stage services used to access park and ride sites suggested that this would lead to an overall increase in (time and money) costs for bus users in the city and is not recommended for further evaluation. These tests were not exhaustive, and an optimal service pattern needs to be identified through a more general network review. This should include other integration opportunities, for example, can express and local service patterns be justified in some corridors, is there a case for linking some park and ride services and whether there are roles for other types of service such as community transport or taxibuses. Of necessity, this work would also need to consider ticketing products which would deliver better integration.

Hypothesis	Can it be supported?	Evidence
The viability of the bus network is likely to decline in the medium term	No	<p>The Better Buses Area Fund is forecast to increase bus patronage in York by 18%. However, the operators' own plans to grow patronage (Section 6) are not clear and there is considerable scope for the operators to work in partnership with CYC to help deliver this level of growth. The fluid nature of bus patronage in York (because many users can use cars or bikes as an alternative to using the bus) means that some operators need to improve the attractiveness of their services to gain new users. This is particularly true of the operators whose satisfaction scores show that there is potential for improvement – and it is likely that making their services more attractive would be an effective way of increasing patronage and revenue as has been seen in many other historic towns and cities. As such, key potential threats to growing the bus market in York are:</p> <ul style="list-style-type: none"> <li>▪ Failure to tackle identified shortcomings with the services now;</li> <li>▪ Market entry by a poor quality operator on one or more corridors in the city;</li> <li>▪ Fares increases above the level of inflation; and</li> <li>▪ Reductions in commercial or supported mileage in the city.</li> </ul>

Hypothesis	Can it be supported?	Evidence
<p>It is not possible to deliver key political commitments on the bus network in York through the current partnership with operators</p>	<p>Yes (the current partnership would need significant development to deliver CYC's aspirations)</p>	<p>The work by the TAS Partnership (Section 6) shows that the existing York Quality Bus Partnership (QBP) has been effective in delivering operational improvements and enhancements to the network such as the multi-operator ticket (although pricing of the ticket is an issue). The relationship between the operators and authority is also good and reported to be better than in many other local authority areas. However, operators in the QBP report a lack of clear objectives from the authority and, conversely, CYC feel that the group exhibit little strategic focus. TAS has suggested that the current QBP has more members than QBPs in similar towns and cities, partly because of the number of operators in York, and partly because of inclusion of non-operators in the group (for example, representatives of groups with restricted mobility). TAS suggest that the current QBP continues, with a relaunch and restatement of its objectives, and that an additional "Executive" group is formed of the operators in York who carry most passengers, so that investment strategies can be co-ordinated between the operators and Council to deliver the Council's patronage growth aspiration.</p> <p>However, through sections 3 to 5 of this report, it would appear that there are significant differences in the quality of bus operation by different operators in York. The fragmented nature of the bus market in York means that no operator is taking the lead in promoting bus services across York (rather than individual operators' services) as they do in locations such as Nottingham or Brighton or, closer to home, as EYMS do in their main Hull market. In the absence of an operator undertaking this activity it must fall to the QBP. This implies a level of intervention (by CYC) and commitment (by operators) which is way beyond the current arrangement. It also implies an approach to the QBP which is quite different to the way it has operated to date. This level of QBP led intervention in a fragmented market covering a whole city (as opposed to a corridor) would be unprecedented because the best practice examples cited by TAS are fundamentally bilateral partnerships between an authority and an operator who is dominant in their local area. Consequently, even with intensive development there is a risk that the partnership may still not deliver the changes CYC wish to see. However, this report recommends that the partnership approach is used in York during delivery of BBAF because BBAF is advanced on the basis of partnership – but that a QCS should be used if it not possible to develop the partnership in line with CYC's aspirations, or if it is not otherwise possible to remove persistently poorly performing operators from the local market. In developing the partnership, this report suggests a programme of formal bilateral operator-CYC</p>

		meetings instead of the Executive Group.
Hypothesis	Can it be supported?	Evidence
A quality contract scheme (QCS) is the only practicable way for CYC to achieve its desired outcomes for the bus network.	Perhaps	<p>A QCS could overcome many of the structural problems with the bus network in York, particularly the fragmentation of the supply market, inconsistent performance standards of operators in the city and the inability so far of the QBP to deliver a multi-operator ticket at what CYC consider to be an appropriate long term price point, helping to overcome some of the views about high bus fares set out in Section 4 (and would appear to offer significant welfare benefits (Section 5)). Addressing these problems would help to unlock patronage growth in York. Also, unlike most local authorities, York has demonstrable experience of operating franchised services through the city’s park and ride operation, which section 4 of this report demonstrates is perceived to be higher quality and operate at lower fares than all but one of the commercially provided services in the city. Consequently, some of the cited risks of operating a franchised network<sup>43</sup> would not apply in York. As such, a QCS could well be an appropriate way to deliver improved bus services in York.</p> <p>However, the city’s recent successful BBAF bid changes matters significantly. BBAF is a presumed to be delivered through a partnership approach, and whilst a QCS could bring benefits to York, beginning the process of applying for a QCS would almost certainly undermine many of the potential benefits of BBAF if it led to problematic relationships<sup>44</sup> with bus operators over the period during which BBAF will be delivered.</p> <p>Consequently, there is merit in use of a twin track approach in York – the partnership should be challenged to improve York’s bus services in the short term towards meeting CYC’s aspirations. If it is successful at achieving this, then the case for a QCS would be weak. However, CYC should continue to develop its plans for a QCS for enactment if the QBP is not successful in delivering the changes CYC wishes to see.</p>

<sup>43</sup> E.g. as cited by the Competition Commission who suggest that a lack of local authority experience in awarding/operating franchised bus networks is a key risk for authorities considering a move to a franchised system.

<sup>44</sup> Work by Steer Davies Gleave for PTEG (2004) suggests that any authority applying for a quality contract runs a high risk of provoking a hostile reaction from local bus operators who may deregister services or cease to invest in their fleets as a response.



## 8 Recommendations

- 8.1 This section of the report makes recommendations about how to develop the bus network in York. The recommendations have been informed by the policy framework (section 2) data collection (sections 3 and 4) and work on integration (section 5) and the partnership (section 6), as well as the conclusions of the hypothesis analysis (section 7).
- 8.2 First of all, it is concluded that there is a clear case for greater intervention in the bus market than CYC presently makes – to ensure consistency of quality between different bus operators and to drive patronage growth. Indeed such intervention is already in progress as demonstrated by the work done by the Council and several partners in successfully bidding to the Department for Transport for the substantial bus component in the Intelligent Travel York project funded from the Local Sustainable Travel Fund and the Get on Board York project funded from the Better Bus Areas Fund (BBAF). Both of these projects rest on joint working with commercial partners and the wider community.
- 8.3 At this stage it is recommended that further intervention in the bus market by CYC is conducted through re-focusing and strengthening the Quality Bus Partnership, with an alternative Quality Contract Scheme (QCS) kept under review in case the partnership is not effective at delivering the aspirations CYC wish to see.
- 8.4 However, the need for greater intervention in the York bus market does imply a more prescriptive approach to bus service regulation, whatever regulatory approach is taken. As an alternative to a QCS based solution, there is a need to place the QBP on a more formal footing. Ways to achieve this include use of Statutory Quality Partnerships and Qualifying Agreements. Potential interventions using these instruments are set out in Section 6 of this report.
- 8.5 The actions which CYC need to consider in taking forward development of the bus network to meet their aspirations are outlined in Table 8.1 below.

**Table 8.1: Actions to improve bus services in York**

Action	Rationale
<p>A. Formulate a clear policy statement about bus services in York and the Council's expectations of bus operators in delivering those policies, and targets (e.g. for patronage growth) and a trajectory to reach the targets.</p>	<p>There are inconsistent patronage targets for bus services in York in the key policy documents relating to developing bus services in the city and the operators claim they do not have a clear picture of what CYC wish to achieve. CYC need to provide a clear "Bus Strategy" for incorporation in the LTP setting out their targets for the network as a whole and what their expectations of operators are. This needs to consider areas such as vehicles, ticketing, pricing and service integration, vehicle accessibility and wheelchair/ pushchair space, network standards, reliability, passenger information, vehicle emissions standards and customer service as a route to the wider outcomes expressed in the city's LTP. The document should also include a statement of the LTA's matching action (e.g. bus priorities, traffic management etc). The patronage and on-bus survey results should form a baseline against which the progress of operators can be monitored, with bus user surveys repeated on an annual basis to assess performance.</p>
<p>B. The policy statement should be developed in consultation with bus operators.</p>	<p>In developing the "Bus Strategy" CYC needs to work with operators through a reformed QBP (see following recommendation) to develop bilateral CYC:operator "Action Plans" to improve on any shortcomings highlighted by the bus users' surveys undertaken as part of this study, and other actions to grow patronage.</p>
<p>C. Reform and strengthen the existing Quality Bus Partnership in the city.</p>	<p>The QBP should be reformed in York to recognise the greater investment which will be needed to make bus services in York meet best practice standards. This requires a number of actions:</p> <ul style="list-style-type: none"> <li>▪ Revision of the documentation and objectives for the QBP so that they match CYC's policy aspirations;</li> <li>▪ Formulation of agreements with individual operators.</li> </ul> <p>It is assessed that the general structure is fit for purpose (subject to the revisions set out in Figure 6.2). Given the volume of work which the QBP will need to take forward it will need additional support to that which it currently receives. It is therefore proposed that a new post is created at CYC to manage the QBP. The precise responsibilities of this post and where it fits into current structures needs to be considered by CYC. The post may initially be financed by CYC, but it is anticipated that it should ultimately be financed by the operators through QBP. The post would:</p> <ul style="list-style-type: none"> <li>▪ Drive the organisation of the QBP (including budgets for task and finish groups);</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Undertake policy and planning work (e.g. developing the “Bus Strategy”, input into development sites and planning documents);</li> <li>▪ Lead QBP initiatives promoting the bus network (e.g. similar to EYMS’s “Big Bus” day);</li> <li>▪ Manage agreements and action plans with operators; and</li> <li>▪ Manage QBP projects (e.g. the proposed network review).</li> </ul>
<p>D. Effectively deliver the currently envisaged local transport authority interventions such as BBAF, the multi-operator ticket, AccessYork and Intelligent Travel York.</p>	<p>To demonstrate purposefulness in developing the bus network, CYC needs to ensure the public transport elements of its own projects are delivered on time and to a high quality. It must ensure key staff are available to give projects their full attention, having sufficient time in their schedules to progress strategic projects as well as day-to-day operational concerns.</p> <p>It is essential that operators are involved in delivering BBAF, for example, through the QBP receiving reports from the project manager or their involvement in a “Project Board”, and assessment against previously agreed targets and trajectories (e.g. for patronage growth and customer satisfaction).</p>
<p>E. Consider whether CYC should provide more revenue support for marginal bus services in York</p>	<p>Once income from the park and ride network is taken into account, CYC’s net service support is amongst the lowest in the UK. CYC should consider whether development of the network could be assisted by greater expenditure on supported services, particularly extending the daytime service into the shoulders of the peaks (for example, ensuring buses run at the same frequency between 7AM and 6:30PM, rather than declining from 5PM as now on many services).</p> <p>It is recommended that this is progressed through a general “network review” of York’s network, against its social and commercial objectives, and CYC’s more general aspiration to effectively service non-central trip generators (e.g. employment and retail at Monks Cross). This should also consider integration between park and ride and stage services, as outlined in test 2 of Section 5 of this study. Other options for integration, for example with home to school services and Community Transport or taxi operations in areas or at times of low demand should also be considered.</p>
<p>F. Continue to use integrated transport, traffic and parking management to ensure that the priorities in CYCs</p>	<p>A number of the BBAF proposals demonstrate needs for action in terms of improving road layouts, car-park pricing relative to ensure the costs of bus and car use are competitive, and efficiently managing parking and loading, alongside new bus priorities and better enforcement of banned traffic movements. Consistent</p>

<p>movement strategies are achieved. Consider opportunities for a bus station in York</p>	<p>application of an integrated transport, traffic and parking management strategy will do much to improve waiting/ interchange environments in York city centre.</p> <p>However the TalkAbout survey and some of TAS's discussions with bus operators highlights that there is substantial support for having a bus station. CYC should consider locational options for a bus station, including sites currently being redeveloped and/ or which the Council would be able to release for development. These should include the site adjacent to the Rail Station which would be released by the removal of Queen Street bridge and relocation of some (or all) rail station long stay parking.</p> <p>CYC should also consider wider integration of land use and transport planning, so that locational decisions (e.g. for retail and employment) are made to build demand for public transport by concentrating development in locations where public transport is already strong, and avoiding dispersal of activity.</p>
<p>G. CYC should monitor progress on the bus network and undertake preparatory work so that it can apply for a QCS if bus services in the city continue to be patchy and inconsistent or if it does not deliver matching improvements in patronage and service quality (by operator action).</p>	<p>It is clear that, if the reformed QBP and BBAF initiative fails to achieve the Council's aspirations, a QCS in York offers the potential to deliver real and lasting benefits in the city, despite potential implementation costs and risks (although some of these can be mitigated by following the recommendations in this report). This is because the small network size in York, lively market for tenders and the city's experience in delivering franchised bus services through the park and ride contract mitigates some of the key risks of a QCS in York. It is proposed that operators should be challenged to deliver the benefits which could be achieved through a QCS through partnership with the city over the duration of the BBAF (as set out above). However, a QCS should remain a live option for implementation post BBAF if CYC is not satisfied with progress against clearly stated objectives. To this end the city needs to develop a clear supporting policy framework (see first recommendation (above)) so that the need for any necessary remedial action can be clearly justified.</p>
<p>H. Follow developments in the wider Leeds city region with regards to bus service performance and management.</p>	<p>In improving bus services in York there is much CYC could learn from WYITA's parallel work developing a quality partnership alternatives to QCS. CYC should consider the work taken forward by ABoWY and its suitability as a basis for developing services in York. The direction of traffic is not one-way, and WYITA may be pleased to discuss CYC's experience of franchised services through the city's park and ride service, noting that the operators' experience in York and elsewhere is already available to ABoWY. Consequently it is recommended that CYC officers explore opportunities for joint work with WYITA into developing bus services through partnership, or indeed through a</p>

	quality contract if the partnership approach is not successful. This can be facilitated through joint working on other initiatives, for example, the West Yorkshire Transport Fund and Leeds City Region planning work.
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**Appendices:**

**Appendix A: a full breakdown of the TalkAbout questionnaire for York residents;**

**Appendix B: copies of the forms used to collect data from bus users;**

**Appendix C: worked examples of service integration;**

**Appendix D: Cabinet Member Decision Session report, January 2012.**

**CONTROL SHEET**

Project name/ number	York Bus Improvement Study (Project 007)
Originator	Julian Ridge
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