

**Report to:** Transport Committee

**Date:** 19 September 2023

**Subject:** **Passenger Experience Update Report**

**Director:** Dave Haskins, Director Passenger Experience and Assets (Interim)

**Author:** Dave Haskins, Director Passenger Experience and Assets (Interim)

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 1. Purpose of this Report

1.1 To provide an update on the public transport network in West Yorkshire, including an update on the Combined Authority's passenger facing activity.

1.2 The report contains an overview of the following:

- Bus and Rail network passenger trends
- Bus and Rail network service changes – recent and proposed
- Rail ticket office closure consultation exercise
- Bus and Rail network performance/reliability
- Rail network enhancements
- Passenger satisfaction and attitudes

## 2. Information

### Bus Network

2.1 Data from First and Transdev shows that weekday bus patronage at the start of this year's school summer holidays was at approximately 66% compared to the pre-pandemic baseline week (March 2020), shown in **Appendix 1**. This is similar to the overall level at the start of the 2022 school summer holidays.

- 2.2 In late July 2023, use of adult tickets was 76% of baseline (March 2020) levels compared with 71% at the same point in 2022. In contrast, use of senior passes was 67% of baseline in late July 2023, compared to 67% in 2022. Ticket machine data shows that bus use peaked at 87% overall and 84% for adult tickets in May 2023. The observed fall in bus use since then appears to be largely seasonal, noting that transport to education sites reduces through June and July.
- 2.3 Service reliability continues to be impacted by traffic congestion and reduced availability of bus drivers and engineers; however bus operators are advising that staff shortages are easing.

### Rail Network

- 2.4 Northern reports rail patronage at approximately 83% compared to pre-pandemic levels, with higher levels when services are stable. Leisure travel continues to lead the recovery, with some weekends regularly proving busier than pre-pandemic and events during the summer have seen an increased demand. Mondays have seen the weakest recovery. Commuter levels are remaining reasonably stable now at approximately 60% overall recovery, based on ticket types (though many commuters are using advance purchase tickets). In response, Northern are targeting several marketing initiatives for commuters.
- 2.5 TransPennine Express (TPE) reports demand at around 75% of pre-pandemic levels, which is the same level as reported to the previous meeting of Transport Committee.
- 2.6 LNER indicates demand is currently at 85% of pre-pandemic levels. This does represent a decline from the previous report to this meeting which could reflect both the summer holiday period and the impact of the ongoing strikes – which are affecting all operators serving our region. The Leeds to London services represents the most popular flow. Leisure demand is close to 100% compared to pre-pandemic levels, whereas business travel is slower to recover.
- 2.7 CrossCountry demand is about 70% of pre-pandemic levels with the leisure market also prevalent; Fridays, Saturdays and Sundays being the busiest days.
- 2.8 Average weekday footfall at Leeds rail station stood at 63% of pre-pandemic levels in July due to a rail strike day and overtime ban throughout the week starting 17 July. The following week saw rail station footfall increase to 74% of pre-pandemic levels. Weekend levels stand at 61% of baseline levels around the same time, but this low figure is due to rail strikes.
- 2.9 Strikes continue to impact demand significantly during the week of the strike but recovering in the week following.

## 2.10 Summary of Network Changes

### Bus Network

- 2.11 Bus services had been sustained throughout the pandemic by a combination of Government and local government funding. In June 2023 the Government withdrew the Bus Recovery Grant (BRG) funding, which has reduced the overall amount of support for bus services in the region. This is partially offset by BSIP+ funding that is expected to come directly to the Authority over the next two financial years. BSIP+ funding is focussed on protection and reinstatement of the bus network. There is still an overall reduction in funding, meaning operators continue to review and adapt their networks in line with new passenger demands.
- 2.12 The Combined Authority have already stepped into retain several services / journeys however are unable to retain everything given our budget position. Whilst the bus network has reduced over the last decade in West Yorkshire to 79% of previous levels, as a result of the collaboration that has taken place with bus operators, the size of the network has not reduced by as much as the majority of other major conurbations (South Yorkshire 73%, Merseyside 70% and Greater Manchester 68%)
- 2.13 From 3 September service enhancements were introduced to the Keighley network and Aireline service (between Shipley and Leeds) as part of the enhanced bus services scheme. In Wakefield new services for the City Fields development are being planned which will create new links to Wakefield, Eastmoor and Pinderfields Hospital.
- 2.14 Bus service punctuality and reliability continues to be impacted by congestion. Operators are constantly reviewing timetables and have brought in several punctuality improvements from the start of September.
- 2.15 A full summary of all the latest bus service changes can be found at [public-transport-changes-23-july-2023-14102.pdf \(wymetro.com\)](#) (from 23 July) and [public-transport-changes-2-sept-2023-14203.pdf \(wymetro.com\)](#) (from 3 September).

### Rail Network

#### *Rail ticket office closure consultation*

- 2.16 Train operators are proposing changes to the way they sell tickets and provide customer service at rail stations that are currently staffed. A consultation was launched on 5 July 2023 via the national Transport Focus body, to seek views from both passengers and stakeholders, which, if adopted, will see a large-scale reduction in the number of ticket offices open, and of the hours during which any station staff are available. Stakeholders were concerned about the length of time, which was provided for the consultation, which was considered completely inadequate. This resulted in an extension to the deadline to 1

September 2023, though this still represents a short timescale for a consultation with such far-reaching implications.

- 2.17 Transport Focus now has the task of collating all stakeholder/public responses. On 6 October final responses will be submitted to the Train Operating Companies (TOCs) by Transport Focus. Between the consultation closing and 6 October, Transport Focus will be engaging with TOCs to see if they can secure improvements to their proposals based on reviews. If not, they may have grounds to object to the proposals in those final responses. In addition, Transport for the North are also submitting a separate response, based on inputs from members, which will go directly to the Secretary of State alongside, but separate from, the responses from Transport Focus.
- 2.18 District partners were made aware of the consultation and information supplied to the Combined Authority, to ensure they had the opportunity to put forward their own representations via Transport for the North to ensure that any specific local considerations are included. District Partners have also been able to provide consultation responses direct to Transport Focus.
- 2.19 The initial information provided as part of the consultation was grossly inadequate across almost every area, including details of what future arrangements are proposed (hours / days, staffing numbers), what physical works are intended to enable the proposed changes, what transitional arrangements would be put in place, supporting data in terms of station usage and ticket sales and proposals for products currently only available from staffed stations. It was also felt that there was little or no evidence of proper and adequate consideration of the social and equalities impacts of all the proposals, potentially having grave impacts on those with protected characteristics and other groups within our communities who are already disadvantaged. Although more information has been provided in this regard, some areas remain only in draft form, making it difficult to comment on, and the information remains far from satisfactory.
- 2.20 The changes for West Yorkshire are significant. Only three of nineteen West Yorkshire stations are proposed to retain a ticket office (with TPE stating that they anticipate Huddersfield will close in the future, reducing this to two). Staff would still be available at stations where there was an existing ticket office, but for West Yorkshire stations the proposal sees a 59% reduction in staffing hours FTE (full-time equivalent) Monday-Saturday, and a 66% reduction on a Sunday. Six of 19 stations currently with a ticket office will no longer have any staff on Sundays. We are concerned that despite this initial redeployment of staff this may in practice lead to the station being de-staffed in the future, without further consultation, to cut costs, as it is only ticket offices that enjoy protection under the industry-wide agreements.
- 2.21 While the Combined Authority is aware that the ways in which rail travellers purchase tickets have changed and there is a case for altering the ways in which staff presence is provided at stations, these proposals are considered to be inappropriate and potentially deeply damaging. The stations with ticket offices planned for closure in West Yorkshire have a combined usage of more

than 12 million; in the North, around one ticket in six is still purchased at a ticket office. Station staff are essential to ensure our railways are accessible, safe and inclusive for everyone. They offer advice, guidance – and sometimes, simply a friendly face to people who may already be socially excluded and/or unused to public transport. Actual and perceived fears for personal safety on and around the railway are also likely to increase.

- 2.22 The consultation also seems to exclude vital themes of fares, ticketing, and retail reform, as well as consideration of the future role of stations – areas in which TfN is progressing vital work, work whose outcomes would be prejudiced if these proposals were implemented. The Combined Authority considers it essential that this work on fares and ticketing, and on “stations as a place”, should be completed *before* widespread proposals are made to change ticket office provision.
- 2.23 The consultation response is included in **Appendix 2**.
- 2.24 Regional Mayors, including Mayor Brabin, have initiated a pre-action legal process as they believe that the consultations are legally inadequate, and the process is being carried out in breach of the requirements of Section 29 of the Railways Act 2005.

### Northern

- 2.25 The next major timetable change on the rail network is on Sunday 10 December. On Northern, while few major changes are planned, and talk early this year about the threat of substantial services cuts has not been borne out, the operator remains under cost pressure from Government and certain cutbacks are proposed which cause the Combined Authority concern. This has resulted in a joint letter having been sent by the Mayor and Transport Committee chair to Northern. The principal concerns highlighted are:
- The withdrawal of a PM-peak additional train (the 17:53 departure) from Huddersfield to Penistone, Barnsley and Sheffield
  - Shorter trains on the Leeds – Doncaster line (three cars vice four)
  - Shorter trains on some trains on the Leeds / Bradford FS / Ilkley / Skipton network

### Trans Pennine Express (TPE)

- 2.26 51 additional Sunday services were introduced on TPE<sup>1</sup> on 11 June, 12 of these being between Manchester Piccadilly and Huddersfield. This was an initial trial period for eight weeks, to be reviewed in August, although TPE have indicated that they propose to continue the services at least until the next timetable change, as it is considered to have been successful.

---

<sup>1</sup> The new operating company is called TransPennine Trains, TPT, but the name TransPennine Express is still used for the services, and for simplicity “TPE” is used in this paper.

2.27 TPE is proposing significant changes to services from the December timetable change, in effect to operate a temporary, reduced “emergency timetable” as part of their recovery plan to deal with the unacceptable performance levels that the operator has seen recently. The principle behind this is that while the ‘headline’ service frequencies would be reduced on several routes, the measure would eliminate, or nearly eliminate, on-the-day cancellations and night-before pre-cancellations (“p-coding”), by essentially only promising what TPE is confident it could delivery on the day.

2.28 It is understood that the reduced timetable would operate for up to a year, but that a phased increase of services may allow some to be reinstated sooner as the resource and training situation improves. At the time of writing, while the plans have been leaked into the public domain, their formal status is not clear in terms of whether the proposal has been approved by Rail North Partnership, nor are full details of the timetables, nor of what conditions are to be applied. The main details known so far of the proposal include:

- Withdrawing the Newcastle – Manchester train that runs in most hours, leaving the hourly Newcastle – Liverpool service.
- Retaining the hourly Teesside – Manchester Airport train
- Scarborough would only be served (hourly) by a shuttle from York, without the trains that run through from Manchester at present every other hour.
- Hull would still be linked to Manchester – but that train would also form the hourly stopping service from Leeds to Huddersfield via Dewsbury
- The hourly Manchester – Huddersfield stopping train would continue.
- It is understood that the planned new Manchester – Huddersfield – Wakefield – Castleford – York service would still go ahead, but the frequency and times are to be confirmed.

2.29 The temporary TPE timetable, by requiring less crew, should increase reliability and see performance improve and confidence return – which in turn should see an uplift in demand levels, which have lagged behind Northern and other operators. However, there are significant concerns that the reduced timetable will not provide enough train capacity to cope with peak demand, especially on the York – Leeds – Huddersfield corridor. This concern is heightened by a plan to remove a significant part of TPE’s train fleet, the “Nova 3” (Mark 5 + class 68) trains, entirely from the operator, apparently without any replacements introduced. The loss of 66 carriages from the TPE operation is a matter of serious concern. In particular, as TPE demand recovers and services are restored in 2024, a substantial capacity gap would be expected. It is not clear whether the loss of these trains, which represent around 18% of the TPE fleet, is intended to be temporary or permanent – but in practice once train crews’ competencies lapse (usually after six months not driving a given type), reintroducing the fleet would be significantly more complex and add expense. If this withdrawal proposal is confirmed, it is suggested that the Combined Authority should make clear its serious concern

and, if no proposals to maintain the fleet size and allow growth and recovery are put forward, object.

### Cross Country

- 2.30 CrossCountry have no major changes to service provision in December apart from a few minor retimings. However, they do propose to remove their HST trains from service and replace them with Voyagers in October, as part of a government-mandated cost-cutting exercise. While CrossCountry have indicated that the busiest trains will be eight or nine car pairs of Voyager units, there is a concern that, with the Leeds–Sheffield route in particular always being heavily loaded, some busy trains will be only four or five cars, which will result in overcrowding and potentially increase dwell time at stations, which could increase delays. CrossCountry have agreed to monitor demand.

### LNER

- 2.31 LNER have been seeking the go-ahead to introduce additional Leeds – London King’s Cross trains on Sunday, when for much of the day the service is currently only hourly rather than half-hourly. The December timetable change sees the start of improvements to this by way of filling an important gap – further improvement is expected next June. In addition, several existing trains on a Sunday will be lengthened – though this means that in two cases, stops at Horsforth have to be removed.

## **Passenger Network Performance**

### Bus Network

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

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

- 2.33 The bus industry target is for 99.5% of registered bus service mileage to be operated (reliability) and 95% of buses to run no more than 1 minute early or 5 minutes late (punctuality). The above results show performance significantly less than the target over the full period. The results are currently aggregated over all operators at all times of the week and the passenger experience at busier times may be worse than this in some places.

- 2.34 Transport Committee members have asked for a more detailed analysis of these results by area. There are a number of data issues to resolve to enable this and it is hoped to offer greater detail in this regard later in 2023.

### Rail Network

- 2.35 Rail strikes which have continued to affect the rail network in West Yorkshire in recent months. At the time of writing no further strike dates have been set, although the RMT and ASLEF unions are expected to announce further dates.
- 2.36 Since the last update to Transport Committee, punctuality has seen a slight decline for Northern and TPE, and for cancellations Northern have increased slightly while TPEs have decreased. Time to 3 (Percentage trains calling at station stops within 3 minutes of the planned time) for the most recent four-week period 4 (July) sits at 81.5% for Northern and 69.47% for TPE.
- 2.37 Cancellations saw Northern at 4.41% (4.73% in the East region) and TPE at 5.06%. These figures exclude cancellations announced by the evening before ('P-coded'), which TPE continues to make extensive use of. More detail of those is detailed below.
- 2.38 On TPE, for the most recent period 4 (July), 11.9% (849) of services were cancelled (approximately 7.2% were P-coded and 4.7% were same day cancellations). On Saturdays in the same period 10.5% of services were cancelled (approximately 4.8% were P-coded and 5.7% were same day cancellations). Since the previous report to Transport Committee there has been a reduction in total cancellations (including P-coding) from 17% to 11.9%. This is a percentage change of -5.1%. The improving trajectory is welcome, but cancellations are being significantly impacted by ASLEF Action Short of a Strike days, where overtime is banned.
- 2.39 A revised recovery plan is being worked through by the new leadership team at TPE, full details of which are awaited, but are understood to include the temporary reduced timetable described in paragraph 2.28 above, but also a reduction in the TPE train fleet. It will be important to maintain pressure and secure accountability for the successful delivery of this, to ensure that any temporary measures fully protect the interests of passengers, and to ensure that no measures (such as fleet reduction) are introduced that will hamper the recovery and future growth of TPE.
- 2.40 Shortly after TPE was taken over by OLR a rest day working agreement was agreed and implemented on the 24 June 2023, which TPE suggest is the best way to accelerate their recovery plan. Since rest day working has been reinstated, performance has improved but, on days when an overtime ban is in operation as part of the Action Short of a Strike implemented by ASLEF, as part of the national dispute, performance significantly worsens again. In addition, during the summer TPE's resource position has been adversely affected by drivers taking holiday leave.



- 2.41 Northern are also struggling with their traincrew resource, which is directly impacting their cancellations and service delivery. There are a variety of reasons for this: sickness, increase in train diagrams (movements) at depots due to blockades, and people leaving the business. Coupled with strikes and actions short of strikes in the ongoing national disputes, the situation has been challenging. Northern are also focussing heavily on route learning and driver efficiency, which will help with cover in the long run, but it also takes people out of delivering the on-the-day service.
- 2.42 Network Rail is currently working with schools and carrying out a national campaign to reduce trespass on the railway, including a focus on level crossing misuse. Vegetation management is also a focus, especially on the Leeds to Wakefield Westgate line at present, not only reducing leaf-fall issues in autumn but improving drivers' sight-lines for signals.
- 2.43 During the recent Morley blockade which formed part of the TransPennine Route Upgrade (TRU) works, Northern took steps to provide strengthening (i.e., longer trains) to help with high passenger loadings. One of the main areas of concern which was picked up from passenger surveys following the blockade was relating to replacement buses including adequate signage on the front of the bus and to locate them on the station, varied quality of provision, cleanliness, and information provision about whether buses are running to time. These were discussed at the most recent Rail Forum Meeting, and it was agreed more performance data was needed in this regard and has been fed back to the TRU team as part of an ongoing lessons learned exercise.

### **Rail Network Enhancements**

- 2.44 In August railway bridge upgrades in the Huddersfield area took place over several weekends. These upgrades will allow the number of railway lines to increase, by strengthening the bridge structures to support more weight. Over weekends in September and October engineers will replace approximately 650m amount of railway tracks. The essential upgrades will not only enable trains to travel at higher speeds in the future, but also significantly improve the overall reliability of services along the Transpennine route as the number of railway tracks will increase from two to four. Forthcoming TRU line closures are listed online here: <https://thetrupgrade.co.uk/upcomingclosures/> .
- 2.45 Also, as part of the TransPennine Route upgrade programme, Network Rail have proposed a number of changes between Leeds and Micklefield. Works include replacing five level crossings with safer alternatives; raising, reconstructing, or removing a number of bridges to enable electrification; and installing some small-scale infrastructure. Network Rail are also proposing a number of temporary work compounds to facilitate the delivery of these improvements.

- 2.46 A Transport and Works Act Order (TWAO) is required to deliver these elements of the Transpennine Route Upgrade. On 17 July 2023 Network Rail submitted its Transport and Works Act Order application to the Secretary of State for the Leeds to Micklefield scheme.
- 2.47 The Combined Authority is supportive of the TRU programme. It is one of the biggest rail investments in our region – creating more jobs, and a faster and more frequent rail network – helping us to create a better-connected, brighter and stronger region for all. TRU is also one of key priority programmes identified in the emerging West Yorkshire Rail Strategy.
- 2.48 The Combined Authority have submitted a positive response to the Secretary of State on 27 August. We have highlighted several areas where there might be a potential impact on the bus network, and we are seeking further information on mitigation measures, timings, timescales and details on specific closures. We also highlighted that rural areas could be disproportionately affected through road closures therefore it is important that Network Rail could provide us with the details so that Combined Authority could assess and mitigate the impact on our communities. Should there be cost implications for the Combined Authority / bus operators to run the diversional services, we are seeking the TRU programme to cover the cost to prevent areas being cut off from the public transport network.
- 2.49 We are also asking Network Rail to work closely with the Combined Authority and Leeds City Council to ensure that adequate mitigation measures can be in place with a robust communication strategy so that the timing and impact of any disruption can be mitigated and communicated to commuters well in advance.
- 2.50 Leeds City Council have also submitted a response to the TWAO consultation. Whilst they are fully committed to and supportive of the proposed programme, there are a number of areas where further collaboration is required to agree the detail of the scheme, particularly during the construction phases and to understand the extent and timeframe for each construction phase. We are seeking Network Rail to work closely with Leeds City Council to resolve those issues and provide the required details.

## **Passenger Satisfaction and Attitudes**

### **West Yorkshire Public Perceptions of Transport Survey**

- 2.51 The Annual West Yorkshire Public Perceptions of Transport Survey provides a long-running measure of views and attitudes towards transport and infrastructure in the region. Many of the questions have remained constant over the years, whilst some have evolved to address the priorities of the time. The latest survey uses a mixed methods approach (predominantly via telephone with a smaller sample from an online panel) of 1,800 West Yorkshire residents aged over 16 which is statistically representative of the population.

2.52 A number of questions in the survey form key indicators for the 2040 Transport Strategy and the State of the Region indicator suite, as well as indicators for the City Region Sustainable Transport Settlement (CRSTS) and the Bus Service Improvement Plan (BSIP) such as satisfaction with local bus services and affordability of public transport. In addition, the results also provide context to support the development of our bus strategy and the bus information strategy. The survey also contains questions relating to perceptions of safety on public transport in response to the Mayor's pledge on the safety of women and girls.

2.53 The key headlines from the survey include:

- **Satisfaction with the affordability of public transport has increased** (from an average score of 5.6 to 6.2 out of 10), whilst simultaneously satisfaction with the affordability of motoring has fallen.
- **Satisfaction levels with local bus services have declined to the lowest levels since the survey began** (with an average score of 5.9 out of 10 this year).
- **The importance of local bus services remains strong**; with an average score of 7.8 out of 10. **Women, residents aged over 65, ethnic minorities, residents living in the most deprived neighbourhoods, residents in full time education and regular bus users** (defined as those who use the bus at least once a week) all reported higher score for the importance of bus than their counterparts.
- **Satisfaction levels with local train services have also declined** (with an average score of 5.8 out of 10).
- **The share of people who use the bus regularly** (at least weekly) remains lower than pre pandemic levels; concessionary pass holders reported a 12% point decline in regular bus use.
- Self-reported **use of taxis has declined across all ages** relatively to pre-pandemic.
- **Confidence purchasing the best value bus ticket has increased**; 69% of people (excluding those who have a bus pass) reported being confident purchasing the best value bus ticket. This rises to 85% for regular bus users (use the bus at least weekly).
- **Satisfaction with the ease of purchasing a bus ticket increased to the highest levels since this question was introduced** (with an average score of 8.4 out of 10 in the latest survey).
- When asked about awareness of travel information sources, **bus RTI displays, operator websites, the Metro website and timetable leaflets all increased**, whilst awareness of MetroLine and Metro Messenger decreased.
- **Confidence in personal safety when travelling on public transport has fallen since last year**. There are clear gender differences in safety perceptions on public transport with females seeing a larger confidence decline than males. Confidence decreased at night more than during the day. Those aged 65+, people who use the bus infrequently and people

who are disabled have low confidence in personal safety on bus in the dark.

### Transport Focus Surveys

- 2.54 Throughout the pandemic, Transport Focus conducted nationally representative research around travel use. The latest iteration of this research surveys 2,000 people nationally representative of the population of Great Britain every other weekend, who are screened to create separate survey reports for bus and rail use. These explore the journey purpose and satisfaction of those who used buses outside London or made a rail journey excluding London Underground in the last seven days, with weightings applied to the varying base numbers to make the results nationally representative. Reports are now published monthly.
- 2.55 The latest insights from surveys published 11 August 2023 were:
- 83% of bus passengers were satisfied with their journey overall, compared to 84% in the previous report.
  - 85% of rail passengers were satisfied with their journey overall, compared to 84% in the previous report.
  - For both bus and rail, satisfaction broadly increases with age, with a dip in the 35-54 cohort for bus.
  - Compared to rail passengers, bus passengers reported higher levels of satisfaction with value for money (73% for bus vs 56% for rail) and crowding (87% for bus vs 71% for rail). Rail reported higher levels of satisfaction with journey time (85% for rail vs 81% on bus), punctuality (78% for rail vs 71% for bus) and frequency of service (70% for rail vs 65% for bus).
- 2.56 Transport Focus published research in July 2023 to explore why older and disabled free bus pass holders appear not to be going back to bus use following the pandemic. Based on an online survey, headline findings show:
- Of the 68% of concessionary pass users who reduced bus use during the pandemic, 33% have continued using the bus less than before the pandemic or reduced it further.
  - Of those using the bus less frequently during the pandemic, 69% made fewer journeys for days out or leisure trips.
  - 41% of those who reduced bus use in the pandemic, and then did not increase over the last year, say that this is because they are still making few or fewer trips for leisure reasons.
  - 32% and 31% respectively say their bus use has not increased in the last year due to service reduction or reliability decline.
  - Among those whose bus use increased over the last year, after falling in frequency during the pandemic, 41% say this is because they are making more shopping trips. 7% say that this is due to using the £2 flat

fare scheme in England (outside of London) to make journeys before 9.30am.

2.57 Transport Focus undertook research in March 2022 and again in March 2023 to understand how the pandemic, cost of living crisis, bus service changes and other contemporary factors have influenced bus use. Headline findings show:

- Despite recent improvements, overall bus patronage has been lost through the pandemic.
- Preference towards car use will be hard to overcome.
- Network and reliability improvements are clear needs.
- Capped fare schemes provide value for money and encourage use.
- Promoting bus services could encourage lapsed and non-users to return.

#### Department for Transport Research

2.58 DfT published an updated research report to explore how national travel patterns have changed following the pandemic. Headline findings are:

- The proportion travelling by public transport has fallen: 48% travelled by bus and 43% by train in November 2022 compared with 63% by bus and 63% by train in the pre-pandemic period.
- The proportions walking (68%) and cycling (26%) in November 2022 remained slightly below the levels reported for the pre-pandemic period (79% and 31%).
- However, the proportions who travelled by car as driver (71%) and by car as a passenger (77%) in November 2022 were similar to those in the three months before the pandemic (71% and 80%).
- A similar proportion of employed people travelled to a place of work at least once a week in November 2022 (78%) as immediately before the pandemic (January-March 2020) (82%). However, the frequency of travelling to work had fallen: 32% of employed people travelled to a place of work five days a week or more often in November 2022 compared with 47% immediately before the pandemic.
- Follow up interviews found participants had settled into new working patterns with little motivation to increase how frequently they travelled to workplaces due to increased flexibility, reduced commuting time and costs, and improved work-life balance.
- When respondents in November 2022 were asked what would encourage them to use public transport more, financial incentives were most commonly mentioned, with more frequent and punctual services.
- In response to the cost-of-living crisis, people's most reported way of saving money on transport was walking more: this was reported by 57% of people. Additionally, just under half (46%) said they had reduced the number of journeys they were making.

2.59 DfT commissioned research to explore what factors would increase bus usage at a national level through strategies and policies designed to drive behaviour change. Headline findings are:

- Bus usage is low due to car dominance.
- Buses underperform on key metrics including reliability and punctuality.
- Buses appeal most to existing users with particular demographic characteristics in age, ethnicity and location.

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

3.1 An important element of the Transport Recovery Plan agreed in 2020 is to try to embed increased levels of active travel and the opportunity to restore and grow public transport use to maintain improved air quality and achieve decarbonisation ambitions.

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

4.1 Sustaining an effective, stable and affordable public transport network is crucial in ensuring the post pandemic economic recovery is inclusive particularly to communities with limited access to private transport.

### **5. Equality and Diversity Implications**

5.1 Ensuring an effective, stable, and affordable public transport network is important for equality and diversity.

### **6. Financial Implications**

6.1 There are no financial implications directly arising from this report.

### **7. Legal Implications**

7.1 There are no legal implications directly arising from this report.

### **8. Staffing Implications**

8.1 There are no staffing implications directly arising from this report.

### **9. External Consultees**

9.1 No external consultations have been undertaken.

### **10. Recommendations**

10.1 That the Committee notes the updates provided in this report.

## **11. Background Documents**

11.1 None

## **12. Appendices**

**Appendix 1** – Insights on transport network use

**Appendix 2** – Rail ticket office consultation response