
MAXIMISING THE VALUE OF BUSES FOR GREATER MANCHESTER

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STAGECOACH: CONNECTING MANCHESTER

- **Network:** 200+ local bus services covering every district of Greater Manchester
- **Fleet:** 797 vehicles operating 29 million network miles a year
- **Jobs:** Major employer providing direct jobs for 2,350 people + supporting many others in supply chain
- **Customers:** Around 111m passenger journeys a year, taking millions of car trips off the road and improving local air quality



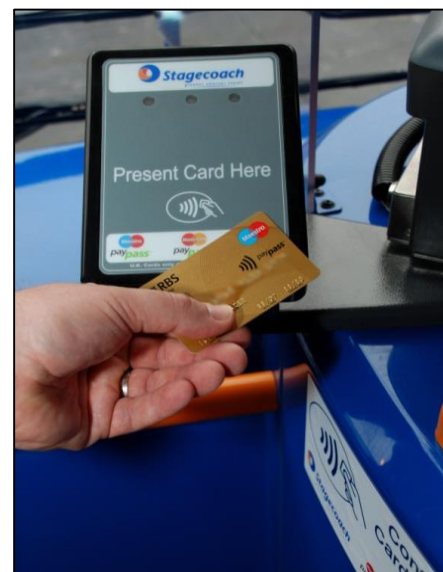
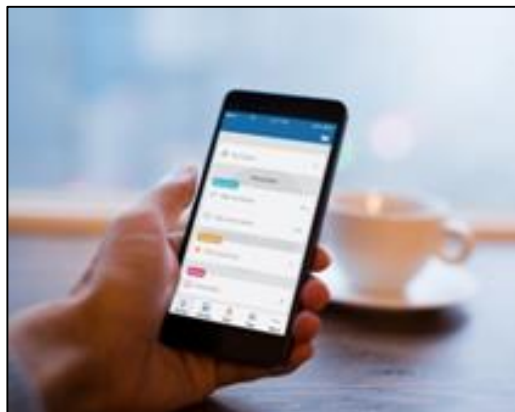
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- **Journey reliability:** despite congestion, 9 in 10 buses start their journey within 5 minutes of their scheduled time
- **Value:** Lowest fares of any major bus operator in UK; weekly unlimited bus travel for £2 a day; further discounted fares for young people, students, jobseekers. 75% customer satisfaction in latest Transport Focus survey, 2nd in UK and up 4% on previous year
- **Quality:** 91% customer satisfaction in latest Transport Focus survey, up 9% on previous year
- **Community:** £46,000 raised for local charities in last 18 months.



MAKING DOOR-TO-DOOR JOURNEYS EASIER AND BETTER

- **Stagecoach mobile app:** M-ticketing, journey planning, bus stop location, live bus tracking
- **Ticketing:** Smart, multi-operator and multimodal tickets for travel across Greater Manchester. Apple and Android pay and easy contactless card payment with faster boarding. 30% of on bus revenue is now contactless
- **Investment:** £116m investment by Stagecoach in greener, fully accessible buses since 2010



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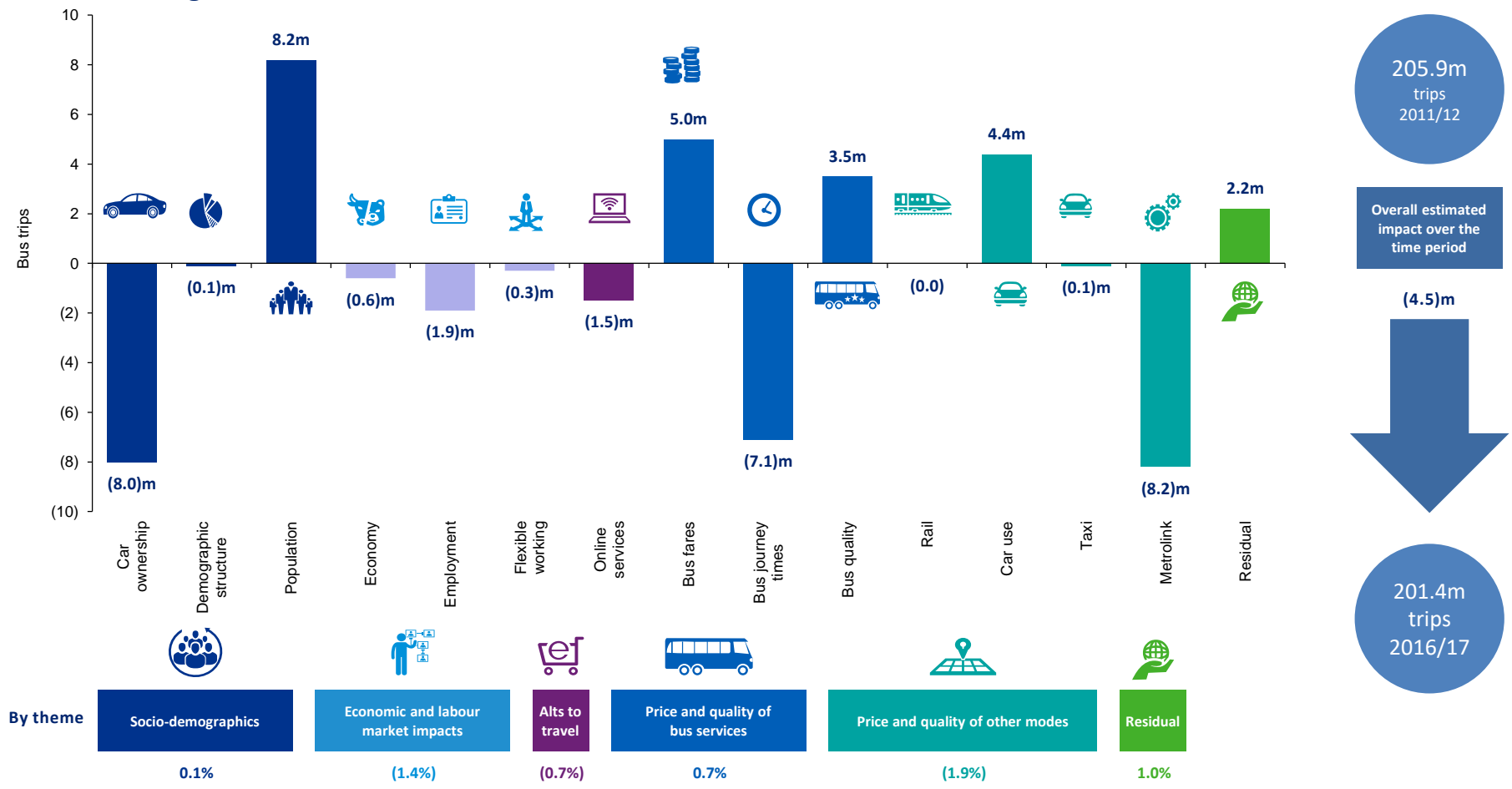
- **Air quality and the Environment:** 144 electric hybrid buses, the largest fleet outside of London and 144 Euro V1 buses making our fleet one of greenest bus fleets of any city in UK. 100% of our waste is recycled
- **Connectivity:** WiFi on many services to help customers stay connected on the move
- **Integration:** Services integrated with Metrolink, National Rail network and Manchester Airport



DRIVERS OF BUS DEMAND IN GREATER MANCHESTER

Historical trends 2011/12 to 2016/2017

Drivers of change



KEY CHALLENGES + SOLUTIONS TO DELIVER BETTER BUSES - 1

■ Road congestion

- average traffic speeds have fallen below 10mph in Manchester, with bus journey times into the regional centre increasing by 10% per decade
- Congestion adds £7-8m to the annual bill of running Stagecoach services in Greater Manchester, pushing up the cost of travel for customers, impacting reliability and damaging public confidence in buses

■ Solutions

- Targeted bus priority measures to improve reliability and punctuality, including more bus lanes and park and ride
- Allocation of road space according to ability of modes to move large numbers of people in most environmentally efficient way
- Stagecoach invested £3m in UK's first privately-funded 455-space bus park and ride facility in Hazel Grove, Stockport
- Measures to restrict cheap parking and incentivise public transport use for peak journeys

KEY CHALLENGES + SOLUTIONS TO DELIVER BETTER BUSES - 2

■ Declining public investment in buses

- Bus Service Operators Grant cut by 20% in 2012-13, and has not increased since
- Central government funding for local authorities has been decreased significantly, resulting in reduced support for bus services
- £500m committed to cycling scheme in Manchester, £87m for new trams, £1m for bus
- In Greater Manchester, public investment in buses was cut by 7% between 2016-17 and 2017-18 at the same time there has been a huge increase in Metrolink funding/expansion

■ Solutions

- A better financial deal for buses at national and regional level to match the importance of buses to the economy and local communities
- Closer working between bus operators, transport authorities + other public sector functions to maximise the value of scarce funding to secure non-commercial socially-necessary services
- every £1 spent on local bus infrastructure can generate up to £7 of benefits for local businesses, communities and the environment (Greener Journeys)

KEY CHALLENGES + SOLUTIONS TO DELIVER BETTER BUSES - 3

■ Health of local high streets

- The health of local high streets and the sustainability of local bus networks are inextricably linked
- Nearly 30% of personal spending in cities is by bus passengers - more than any other mode of transport - making buses central to the region's economic future.
- Concern about plans to remove buses from Piccadilly Gardens, which would damage the bus network, make journeys more complex for customers, impact city centre businesses and encourage greater car use/congestion

■ Solutions

- Deliver better access to city centres for buses and other sustainable modes, but restrict car use.
- Ensure out-of-town retail planning policies do not damage city centre retailers
- More equitable central government taxation policies to ensure local retailers are not disadvantaged compared with online retailers

PARTNERSHIP WORKING KEY TO SECURING FUTURE FOR BUSES

- **Objective:** secure a more sustainable bus network, ensure further improvements for customers and best value for taxpayer investment in buses
- **Shared responsibility:** delivering high quality, affordable and sustainable bus services is collective responsibility of transport providers, political leaders, local authorities and central government
- **Strong and constructive partnership working:** best route to meeting customer expectations + delivering vision of Mayor and Combined Authority
- **Partnership working with Transport for Greater Manchester:**
 - ✓ quality standards
 - ✓ simplified & capped ticketing
 - ✓ stable network
 - ✓ customer information
 - ✓ punctual and reliable services
 - ✓ Air quality

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THANK YOU

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