

## GMCA Overview and Scrutiny Committee

Date: Wednesday 26<sup>th</sup> July 2023  
Subject: Delivering the Bee Network: Fares and Products  
Report of: Andy Burnham, Mayor of Greater Manchester, Portfolio Lead for Transport and Eammon Boylan, Chief Executive Officer, GMCA & TfGM.

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### Purpose of Report

The report sets out the proposed introduction of fares and products that will be available to customers travelling from 24<sup>th</sup> September 2023.

### Recommendations:

The GMCA Overview and Scrutiny Committee is requested to:





1. Note and comment on the proposed range of fares and products that will be available to customers travelling from 24<sup>th</sup> September 2023;
2. Note that GMCA at its meeting on 30<sup>th</sup> June 2023, noted that the Multimodal Ticketing and Products detailed in the 'Delivering the Bee Network Multi Modal Fares and Products' report would be considered by the GMCA Overview and Scrutiny Committee at its meeting in July 2023;
3. Note that any recommendations or feedback will be presented to the GMCA on 28 July ahead of their approval of the proposed range of fares and products.

### Contact Officers

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## Equalities Impact, Carbon and Sustainability Assessment:

Impacts Questionnaire		
Impact Indicator	Result	Justification/Mitigation
Equality and Inclusion	G	
Health	G	
Resilience and Adaptation		
Housing		
Economy	G	
Mobility and Connectivity	G	
Carbon, Nature and Environment	G	
Consumption and Production		
Contribution to achieving the GM Carbon Neutral 2038 target		
<b>Further Assessment(s):</b>	Equalities Impact Assessment and Carbon Assessment	
 <b>Positive</b> impacts overall, whether long or short term.	 <b>Mix of positive and negative</b> impacts. Trade-offs to consider.	 <b>Mostly negative</b> , with at least one <b>positive</b> aspect. Trade-offs to consider.
		 <b>Negative</b> impacts overall.

The Bee Network is a critical enabler of Greater Manchester’s Net Zero ambitions; a truly integrated transport network across active travel and public transport that will provide excellent public transport and active travel choices for all, promoting sustainable travel behavioural change through integrated spatial, digital and transport planning; and supporting the electrification of vehicles and public transport fleets.

### Risk Management

The risks and opportunities resulting from the introduction of these products are set out in sections 2 and 3 of the report.

### Legal Considerations

The introduction of a *Bee AnyBus* and a *Bee AnyBus and Tram* Group ticket will be subject to approval by the Greater Manchester Travelcards Limited (GMTL) Board.

### Financial Consequences – Revenue

See Section 3.

### Financial Consequences – Capital

N/A

**Number of attachments to the report:** None

### **Comments/recommendations from Overview & Scrutiny Committee**

This report will be considered by the GM Overview and Scrutiny Committee on Wednesday 26th July 2023.

### **Background Papers**

GMCA Report - Towards the Bee Network - Network Review, Market Renewal and Bus Service Improvement Plan, 24th June 2022.

GMCA Report - Delivering the Bee Network: Bus Fares, Zero Emission Buses, Bus Depots and CRSTS, 29th July 2022.

GMCA Report – Delivering the Bee Network Multi Modal Fares and Products, 30<sup>th</sup> June 2023 (Refer to Appendix B)

### **Tracking/ Process**

Does this report relate to a major strategic decision, as set out in the GMCA Constitution?

No.

### **Exemption from call in**

Are there any aspects in this report which means it should be considered to be exempt from call in by the relevant Scrutiny Committee on the grounds of urgency?

No

### **Bee Network Committee**

This report will be considered by the Bee Network Committee on Thursday 27th July 2023.

# 1. Background

- 1.1. Greater Manchester's move to bus franchising provides the mechanism to deliver transformational change in bus service delivery. This all builds towards delivering the Bee Network, an integrated 'London-style', high patronage, low fare, transport system, which will transform the way people travel across the city region.
- 1.2. The continuation of maximum / capped bus fares and the introduction of a range of multimodal ticketing products were approved by GMCA at its meeting on Friday 30<sup>th</sup> June, subject to any recommendations made by the GMCA Overview and Scrutiny Committee.

# 2. Proposals

## Franchised Services

- 2.1. It is proposed to introduce a range of further ticketing products for customer groups, including students and those travelling across the GM boundary, who will be traveling on franchised bus services, from the commencement of Tranche 1 of bus franchising on 24<sup>th</sup> September 2023.

### ***Students***

- 2.2. Whilst there are some student products currently available, they are all priced differently, with many only available on operators' own services.
- 2.3. It is therefore proposed to introduce *Single Term* (e.g. Autumn Term) and *All Term Bee Bus* products for students from the commencement of Tranche 1 of bus franchising on 24<sup>th</sup> September 2023. The products will be valid for use on any franchised bus services with a valid Student ID. The proposed pricing of the Autumn term product is set out in Appendix A to this report. Pricing for future terms will be confirmed in due course.
- 2.4. The existing GMTL AnyBus, GM wide, student monthly product will continue to be available and it is assumed that operators will continue to offer their own student products on non-franchised services.

### ***Cross Boundary***

- 2.5. The draft Greater Manchester Bus Strategy, that is included as a separate item on the agenda for this meeting, emphasises the importance of maintaining cross boundary connectivity, as well as simplifying and standardising fares across Bee Network services.
- 2.6. To support customers traveling on franchised services outside of Greater Manchester and the Greater Manchester Travelcard (GMTL) boundaries where the *Bee AnyBus* tickets would not be valid, it is proposed to introduce 1 and 7 day Adult and Child *Bee Bus* products. These products would be priced at the same level as the *Bee AnyBus* tickets.
- 2.7. Cross boundary services that come into the Franchised Area from outside of Greater Manchester will require a Service Permit. The conditions of the Service Permit Scheme will ensure that customers who use these services wholly within GM will have access to the same ticketing products as they would have on any franchised service.

### ***Discounted Corridors***

- 2.8. From 24th September 2023, it is also proposed to introduce 7 day Adult and Child Salford Corridor discounted products which will only be valid on specific services/parts of specific franchised services where discounted fares are currently offered by operators. We will continue to promote the *Bee AnyBus* products to encourage customers to purchase products that give access to the wider GM network and therefore drive up patronage. As we move through transition, we will continue to review the current discount proposition on non-franchised services.
- 2.9. The plan however is to remove these anomalies by 2025, to ensure that there is a consistent proposition for all customers.

### ***Single Operator Products***

- 2.10. Building a simple, integrated ticketing offer will mean removing a number of remaining anomalies in the existing ticketing product set. This will include the removal of single operator products in franchised areas and replacing them with the standard products that currently exist as part of the capped scheme, i.e. single, day and weekly *Bee AnyBus* products.

- 2.11. Although this change may see a very small proportion of customers' journeys costing more than they do currently, these single operator products typically provide significantly less connectivity than comparable *Bee AnyBus* products; and for bus users currently travelling on multiple operators' networks and purchasing multiple tickets, the pricing of the *Bee AnyBus* products would provide an overall saving compared to the cost of their current journeys.
- 2.12. Whilst inflationary increases could occur on individual operator fares, this will, following the decision taken by GMCA in June 2023 to continue to hold maximum / capped bus fares at existing prices until at least September 2024, not impact on the single, day and weekly *Bee AnyBus* products which will make up the significant majority of bus fares. For the very small proportion of customers' journeys where differences do continue to exist, we will seek to ensure no one faces a detrimental financial impact, by recompensing users on a case-by-case basis.
- 2.13. Operators in non-franchised areas will continue to sell and accept their own products before the services are franchised. Those single operator products will not be valid on franchised services.
- 2.14. As the transition to franchising continues, we will work to review further opportunities to simplify and standardise fares and products.

### **GM Wide**

- 2.15. Bus & Tram multimodal ticketing products in the city region are currently owned by Greater Manchester Travelcards Limited (GMTL), a company co-owned by Greater Manchester's private bus, rail and tram operators and Transport for Greater Manchester (TfGM).

### ***Bee AnyBus and Bee AnyBus and Tram Group Travel***

- 2.16. In addition to the fares and products that will be available to customers travelling on franchised bus services from 24<sup>th</sup> September 2023, work is also underway with GMTL to introduce a *Bee AnyBus* Group Product (and, in time, to also launch a *Bee AnyBus and Tram* product) to support group / family travel across the network. Details of these products continues to be worked through with GMTL, with the intention that they will be introduced for 24<sup>th</sup> September 2023.

### ***Annual Travel***

- 2.17. In order to make travel affordable for all customers in the context of the cost of living crisis, work is also progressing to introduce arrangements whereby annual travel can be procured via an arrangement with a credit union, with the intention that this will also be introduced for 24<sup>th</sup> September 2023.

### ***Working with Employers***

- 2.18. As part of the Market Renewal programme, to increase patronage and revenues, work is progressing to develop a range of products to help incentivise employers and to enable them to promote them to staff. Further details will be provided to GMCA in due course.
- 2.19. A full list of products and pricing that will be available from 24<sup>th</sup> September, including those proposed in this report, is set out in Appendix A.

## **3. Affordability**

- 3.1. The products outlined in this report represent a very small proportion of existing bus travel. Marketing these new products effectively will provide significant potential to increase total journeys - and total revenues to support and invest in the bus network.

## Appendix A

<b>Fares &amp; Products – Subject of this Report</b>	
<b>On Franchised Services only</b>	
Term 1 Bee Bus (1st Sept to 31st Dec)	£140
Term 2 Bee Bus (1st Jan to 31st March)	To be confirmed
Term 3 Bee Bus (1st April to 30th June)	To be confirmed
All Terms Bee Bus (1st Sept to 30th Jun)	£300
1-day Bee Bus	£5 adult
	£2.50 child
7-day Bee Bus	£21 adult
	£10.50 child
7- day Bee Bus Salford	£15.60 adult
	£7.80 child
<b>On all GM Bus Services</b>	
1-day Bee AnyBus Group 1-day Bee AnyBus + Tram Group	To be confirmed

<b>Fares &amp; Products – Approved by GMCA in June 2023</b>	
<b>On all GM Bus Services</b>	
Single fare	£2 adult
	£1 child
1-day Bee AnyBus	£5 adult
	£2.50 child
7-day Bee AnyBus	£21 adult
	£17 Young Person/Student
	£10.50 child
28-day Bee AnyBus	£80 adult
	£58 Young Person/Student
	£40 child
1-day Bee AnyBus + Tram (Anytime) zonal variants	£6 – £9.50 adult
	£3 – £4.80 child
1-day Bee AnyBus + Tram (off- peak) zonal variants	£5.40 – £7.80 adult
	£2.70 – £3.90 child
7-day Bee AnyBus + Tram zonal variants	£24.80 – £41 adult
	£12.40 – £20.50 child
28-day Bee AnyBus + Tram zonal variants	£91.40 – £136 adult
	£45.70 – £68 child



## Appendix B

### Greater Manchester Combined Authority

Date: Friday 30th June 2023

Subject: Delivering the Bee Network: Multimodal Fares and Products

Report of: Andy Burnham, Mayor of Greater Manchester, Portfolio Lead for Transport and Eammon Boylan, Chief Executive Officer, GMCA & TfGM.

#### Purpose of Report

The report sets out a range of multimodal ticketing products to make it easier for passengers to switch between bus and Metrolink. Subject to approval, the products will be implemented across Greater Manchester from 24<sup>th</sup> September 2023 to coincide with the start of bus franchising.

## **1. Background**

- 1.1. Greater Manchester's move to bus franchising provides the mechanism to deliver transformational change in bus service delivery. This all builds towards delivering the Bee Network, an integrated 'London-style', high patronage, low fare, transport system, which will transform the way people travel across the city region.
- 1.2. In addition to the proposed continuation of the maximum / capped fares as set out in the separate report on the agenda for this meeting; and in order to support integrated bus and tram travel across Greater Manchester, it is proposed to introduce a range of Bus & Tram multimodal ticketing products for both adults and children from the commencement of Tranche 1 of bus franchising on 24th September 2024.

## **2. Proposals**

- 2.1. Bus & Tram multimodal ticketing products in the city region are currently owned by Greater Manchester Travelcards Limited (GMTL), a company co-owned by Greater Manchester's private bus, rail and tram operators and Transport for Greater Manchester (TfGM). At present, these products are only available as a combined AnyBus and (all zone only) tram ticket and are available for adults only.
- 2.2. From 24th September, it is proposed that they are to be available for different combinations of tram zonal travel (as well as the existing all zone option) and for different periods (one, seven and 28 day). Child equivalents will also be introduced at 50% of the adult price. TfGM and GMTL are also considering the option of introducing annual products, with financial assistance available from organisations such as Credit Unions, to ensure lower income households can also benefit from the value of such products.
- 2.3. These multimodal products will, during the transition to a fully franchised bus network, continue to be 'owned by', and the prices will continue to be set by, GMTL.
- 2.4. The prices will, however, be set at a discount compared to the price of buying separate bus and tram tickets. Appendix A includes the proposed prices for each of the products for full fare paying adults and the child fare equivalents.

- 2.5. Subject to agreement of the proposals (included within a separate report on the agenda for this meeting) to continue to price the maximum / capped bus fares at existing levels, bus only users travelling on any bus in Greater Manchester, including franchised and non-franchised services, will be able to continue to purchase single, one day and 7 day AnyBus tickets at the current maximum / capped prices. The 28 day product AnyBus will also continue to be available, this product is currently priced at £80; and as referenced above discussions will continue in relation to the introduction of annual products.
- 2.6. Expanding the Bus & Tram product set to include child tickets, as well as different combinations of tram zonal travel, offers new opportunities for integrated travel to existing customers that previously had to buy an all zone, adult ticket, which therefore offered relatively poor value for money. The expanded products seek to better align the product offering to the journeys that customers want to make, making integrated travel easier, and driving patronage in the process to deliver a 'London-style' high patronage, low fare, integrated transport system.

### **3. Affordability**

- 3.1. The available data indicates that there are currently very few multimodal journeys (less than 2% of total journeys) currently being made, and therefore, that there is a large, currently 'untapped' market for multimodal products.
- 3.2. An increase in multi modal journeys of 15% (that would still represent less than 3% of total journeys) would offset the impact of reducing the price of existing multi modal journeys.
- 3.3. Marketing these new products effectively will provide significant potential to increase multimodal, and total journeys - and total revenues - significantly beyond the offset position described in the paragraph above.
- 3.4. In addition to the AnyBus and multimodal (bus and tram) products that will be available across GM, work is underway to finalise the product offering for a range of other customer groups who will be traveling on franchised services, including students, families and those travelling across the GM boundary.
- 3.5. Holders of concessionary passes will be able to continue to use their existing passes on franchised and non-franchised services across GM as they do now.

- 3.6. As part of the further development of the Bee Network work will is underway to integrate rail (as part of the Greater Manchester Combined Authority Trailblazer deeper devolution deal) and cycle hire into a fully integrated ticketing offer.

## Appendix A – Proposed Multi Modal fares and Products

	1 -day anytime travelcard		1-day off peak travelcard		7-day anytime travelcard		28-day anytime travelcard	
	Adult	Child	Adult	Child	Adult	Child	Adult	Child
<b>AnyBus + Any one zone (1,2,3,4)</b>	£6.00	£3.00	£5.40	£2.70	£24.80	£12.40	£91.40	£45.70
<b>AnyBus + Two zones (1+2)</b>	£7.30	£3.70	£6.70	£3.40	£30.30	£15.20	£110.10	£55.10
<b>AnyBus + Two zones (2+3 or 3+4)</b>	£6.70	£3.40	£6.40	£3.20	£28.40	£14.20	£103.60	£51.80
<b>AnyBus + Three zones (1+2+3)</b>	£8.70	£4.40	£7.30	£3.70	£36.40	£18.20	£128.90	£64.50
<b>AnyBus + Three zones (2+3+4)</b>	£7.60	£3.80	£7.00	£3.50	£32.50	£16.30	£117.50	£58.80
<b>AnyBus + All Zones</b>	£9.50*	£4.80	£7.80*	£3.90	£41.00*	£20.50	£136.00*	£68.00

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