

# DRD: the effectiveness of public transport in Northern Ireland







Northern Ireland Audit Office

# DRD: the effectiveness of public transport in Northern Ireland

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K J Donnelly

Northern Ireland Audit Office

Comptroller and Auditor General

21 April 2015

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# Abbreviations

<b>BMA</b>	Belfast Metropolitan Area
<b>BMTP</b>	Belfast Metropolitan Transport Plan
<b>DoE</b>	Department of the Environment
<b>DRD</b>	Department for Regional Development
<b>DTTS</b>	Department of Transport, Tourism and Sport (Ireland)
<b>DVA</b>	Driver and Vehicle Agency
<b>GHG</b>	Greenhouse Gases
<b>ITSG</b>	Integrated Transport Stakeholder Group
<b>NITHC</b>	Northern Ireland Transport Holding Company
<b>NIR</b>	Northern Ireland Railways
<b>NTA</b>	National Transport Authority (Ireland)
<b>PfG</b>	Programme for Government
<b>PNR</b>	Private non-residential
<b>PSV</b>	Public Service Vehicle
<b>PTE</b>	Passenger Transport Executive
<b>QBCs</b>	Quality Bus Corridors
<b>RDS</b>	Regional Development Strategy (2001)
<b>RSTNTP</b>	Regional Strategic Transport Network Transport Plan
<b>RTS</b>	Regional Transportation Strategy (2002)
<b>RTSSG</b>	Regional Transportation Strategy Steering Group
<b>SRTP</b>	Sub-regional Transport Plan

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# Glossary of Terms

## **Belfast City Centre Cordon**

A series of routes that form a cordon around Belfast City Centre. These include Donegall Quay, Queens Bridge, Queen Elizabeth Bridge, Divis Street, Peters Hill, Clifton Street, North Queen Street, York Street, Nelson Street, Corporation Street, Albertbridge Road, Ormeau Road, University Road, Lisburn Road, Donegall Road and Grosvenor Road.

## **Greenhouse Gases**

Atmospheric gases that contribute to the greenhouse effect by absorbing infrared radiation produced by solar warming of the Earth's surface. They include carbon dioxide, methane, nitrous oxide, and water vapour. Elevated levels of greenhouse gases especially of carbon dioxide and methane are directly related to the burning of fossil fuels.

## **Modal Shift**

The movement of passengers from one mode of transport to another (e.g. from cars to public transport).

## **Private non-residential car parking spaces**

Parking provided by business developments.

## **Passenger Transport Executives**

Local government bodies in Great Britain which are responsible for public transport within large urban areas.

## **Quality Bus Corridors**

Initiatives that give dedicated road space, by bus lanes, and traffic signal priority to buses in order to reduce journey times and improve service consistency. They may be supported by Park & Ride facilities. The aim is to encourage people to change from cars to buses and thus reduce traffic congestion.

## **Translink**

A brand name for the three operating companies that comprise the Northern Ireland Transport Holding Company (NITHC) – Ulsterbus, Metro and Northern Ireland Railways (NIR).

# Executive Summary



## Executive Summary

1. Public transport has an essential role in the economy and community of Northern Ireland. An effective public transport system can improve the:
  - local economy by bringing workers and jobs together;
  - environment by promoting a more sustainable form of transport than the car, which can reduce pollution levels and traffic congestion; and
  - mobility of older people, rural dwellers and those with disabilities.
2. This study examines the effectiveness of public transport in Northern Ireland by assessing performance against the public transport initiatives and targets outlined in the Regional Transportation Strategy (RTS) (2002) over the period 2002 - 2014. It also assesses public transport by benchmarking Northern Ireland with other countries – England, Scotland, Wales and the Republic of Ireland - and by benchmarking public transport in Belfast to other comparable United Kingdom and European cities. Our benchmarking work compared Northern Ireland's public transport performance, funding and structure.

regulated by the Department for Regional Development (DRD), has been mixed. The significant investment prompted by the RTS has transformed rail travel with passenger journeys doubling. In contrast, total bus passenger journeys (Metro and Ulsterbus combined) between 2002-03 and 2013-14 increased by 1.5 per cent (or 1 million journeys). Within this, Metro passenger journeys are up by almost a third, but Ulsterbus has suffered a 12 per cent decrease in passenger journeys. Overall passenger journeys have increased by 11 per cent but the proportion of fare paying passengers is declining. Allied to this, there has not been a modal shift of passengers from cars to public transport. Statistics show commuters are less likely to use public transport to get to and from work than a decade ago, and morning peak hour bus speeds on Belfast's arterial routes are getting slower.
3. The vast majority of targets set under RTS have been achieved. Despite this, in our view, in terms of outcomes, the performance of public transport in Northern Ireland since 2002, delivered by Translink and controlled and
4. The Belfast Rapid Transit System, with three routes connecting East Belfast, West Belfast and Titanic Quarter via the city centre, was planned for implementation in March 2012. This project has suffered delays and is now planned to be operational in March 2017.
5. It is fair to say that the public transport infrastructure in Northern Ireland has been vastly improved in the first decade of this century, with new fleets of trains and buses, but equally fair to say that this has not led to significant increase in the use of public transport. Northern Ireland travellers are still wedded to the car.

### The performance of public transport

## Benchmarking the performance of public transport

6. Previous benchmarking studies of the efficiency and effectiveness of Metro and Ulsterbus, carried out on behalf of the DRD, found that the companies performed relatively well in terms of operating cost per bus and staff per bus, but lay at the lower end of the range on turnover per employee, wage cost per employee and the operating staff to management ratio. The NIAO and the DRD's own benchmarking showed Northern Ireland Railways (NIR) to be relatively efficient. The Department told us that it has already taken steps to ensure that Translink examines and addresses some of the poorer performing indicators.
7. NIAO benchmarking work found that the level of service on the bus networks in Northern Ireland is comparable to Scotland and Wales but much less than England. Levels of service on the Ulsterbus network are higher than comparable regions in Great Britain but Metro service levels are less than comparable city regions in Great Britain. The Department told us that, in relation to Belfast, certain Ulsterbus routes need to be taken into account, as they also serve the population of the Belfast City region, particularly in transporting school pupils.
8. Bus fares in Belfast are relatively competitive with other British cities and passengers on Metro and Ulsterbus enjoy relatively high levels of comfort. Metro customers were, however, less satisfied than customers in other

parts of Great Britain. Rail fares are generally cheaper than in other parts of the United Kingdom but rail journeys remain relatively slow, although customer satisfaction ratings compared very favourably to other customer satisfaction ratings of local rail companies in Great Britain.

## The funding of public transport

9. Despite the increased levels of investment in public transport in the past decade, the DRD has made little progress in shifting the balance of funding from roads towards public transport. The proportionate indicative split for budgetary planning purposes in the RTS between roads and public transport over the period 2002-2012 was 62:35. The actual outturn was 70:28. More recently, the Department's 2013-14 Budget showed an intended split between roads and public transport of 85:15<sup>1</sup>. However, the actual outturn was mitigated by a reduction in roads expenditure of £89 million (due to delays with the A5 scheme) leaving the ratio at 77:23.
10. The Department has told us that the allocation of funding here largely reflects the maintenance needs of the local road network and a local rail network which is much smaller than other United Kingdom regions, together with the need for significant investment in the strategic road network to build regional connectivity and address the legacy of under investment over previous decades. However, in our view, if the mix of

1 DRD Business Plan 2013-14: Annex D

## Executive Summary

public transport and roads funding is to encourage modal shift, the necessary costs incurred on road maintenance should not jeopardise or delay the delivery of its initiatives on modal shift. Therefore, the Department must be much bolder in setting out the practical steps required to achieve this strategic outcome.

### The structure of public transport

11. Northern Ireland public transport is heavily regulated. DRD, through its Governance, Policy and Resources Group, regulates, sponsors and controls the Northern Ireland Transport Holding Company (NITHC), a public corporation which has three subsidiary transport companies – Ulsterbus, Metro and NIR – which operate under the brand Translink.
12. In 2002, the DRD set out plans to reform public transport in Northern Ireland by creating an Agency, independent from the DRD, to regulate, sponsor and control the NITHC. However, this Agency was never created and instead, a separate Division of the DRD was created in April 2013 – Transport NI. This consisted of the former Executive Agency – Roads Service – and the public transport facing branches of the DRD. The staff and resources allocated to roads in this new Division greatly outnumbered the staff and resources allocated to public transport. In April 2014, the public transport facing branches were transferred to the DRD's Governance, Policy and Resources Group.

13. We found that there is a paucity of professional public transport skills available within the DRD. In our view, the lack of adequately skilled transport planning professionals limits the Department's ability to guide and drive best practice in public transport services and to act as an informed customer capable of effectively holding NITHC/Translink to account. It is important, also, that the Department benchmarks its structure and performance against other public transport functions in order to test if its model is optimal in terms of size, shape and required skills sets.

### Challenges for the future

14. While patronage of rail and Metro bus services has improved in recent years, in general, public transport has failed to gain significant ground against car usage. The Department told us that transport investment reflects largely the maintenance needs of the Northern Ireland road network and the fact that the rail network is less extensive than elsewhere in the United Kingdom. A renewed focus on public transport, supported by a re-balancing of funding priorities will be essential, therefore, if the DRD is to respond successfully to the challenge of setting and achieving modal shift targets in an environment where car travel is convenient and popular and investment in roads has continued to expand faster than that for public transport. This need for re-balancing is brought into sharp focus by the challenging budget cuts in 2014-15 and subsequent years.



15. In our view, such a change in emphasis and approach also underlines the importance of ensuring that the structural model adopted for the governance, planning and management of public transport is the one most likely to produce a sustainable public transport system that is an attractive alternative to the car and can help reduce greenhouse gases and traffic congestion. In other words, institutional arrangements which can get the most people using the best public transport at the best value for money. The DRD's new policy in this area – Ensuring a Sustainable Transport Future: A New Approach to Regional Transportation (March 2012) – will become operational in April 2015, and will need to deal with these challenges. The Department told us that a key aim of the 'New Approach' is to support strong sustainable growth for the benefit of all parts of Northern Ireland. In doing so, the objective-led approach recognises the need both to invest in the strategic road network to enhance regional connectivity whilst prioritising public transport investment to promote more sustainable utilisation of that network.
16. Unlike the National Transport Authority in the Republic of Ireland and Transport Scotland, the Department has decided, after consideration, not to establish an independent statutory agency to manage public transport. Given the decision to retain the planning and management of public transport within the DRD, it is important that steps are taken to ensure that these arrangements provide effective capacity and capability for public transport governance, planning and management and can increase passenger numbers consistently in a cost effective manner.
17. The DRD has established a framework of indicators for aspects of public transport performance but there is more to do. In particular, there is a need to ensure that the framework includes a wider range of performance outcome measures. Outcome indicators are particularly informative, since they measure performance directly against specified objectives. Currently the objectives established for public transport in the various strategy documents are not being measured or managed as comprehensively as possible.
18. The existence of a wide array of car parking facilities in Belfast, along with the high levels of greenhouse gas emissions associated with high rates of car usage suggests the need for a reconsideration of planning around public transport and modal shift. Transport planning in the DRD needs to give public transport a much higher profile than at present and find some way of ensuring that in catering for car users, this complements, rather than competes with, policies to promote a modal shift in favour of public transport.
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Part One:  
Introduction



## Part One: Introduction

### Public transport in Northern Ireland is heavily regulated

- 1.1. Public transport in Northern Ireland is controlled and regulated by the Department for Regional Development (DRD). Its Public Transport Services Division (PTSD) is responsible for the discharge of statutory and other duties in respect of public transport. PTSD sponsors the Northern Ireland Transport Holding Company (NITHC) and provides financial and administrative support to help ensure the operational delivery of transport policy. This extends to the planning, delivery and governance of public transport.
- 1.2. NITHC is a public corporation established under the Transport Act (NI) 1967 to take over the rail and bus services of the (previous) Ulster Transport Authority. Translink is a brand name which was introduced in late 1996 to cover the integrated services of Ulsterbus, Citybus (now Metro) and NIR.
- 1.3. The NITHC Board is responsible to the DRD for the operation of Translink and to approve its strategic direction and ensure proper governance. Translink is managed by a single integrated Executive Team.
- 1.4. In contrast to the widespread privatisation and deregulation of public transport operations in the rest of the United Kingdom, public transport here remains state owned and wholly regulated and gives the operators a near monopoly on scheduled services.

The Department told us that its Public Transport Reform consultation in 2009-10 found widespread agreement that services should continue to be regulated.

### The 2002 Regional Transport Strategy planned for an integrated, efficient and affordable public transport system

- 1.5. The strategic direction for public transport in Northern Ireland was contained within the Regional Transportation Strategy (RTS) for Northern Ireland 2002-2012<sup>2</sup>. This provided an overarching strategy for transportation in general. However, it did not contain a separate strategy in relation to public transport.
- 1.6. The RTS, at that time, represented a framework for change in the quality of transport infrastructure and services towards the achievement of the longer term vision for transportation set out in the Regional Development Strategy (RDS) of 2001.
- 1.7. The RTS was developed within the wider United Kingdom policy context which emphasised the need for a more sustainable approach to transport, in order to counter the problems of pollution and congestion, and the need to improve public transport through greater investment.

1.8. While acknowledging that roads will remain the predominant feature of the transportation infrastructure, the RTS identified, as a key characteristic of the future Northern Ireland transportation system, the need for

***‘A modern and innovative public transport system that provides an alternative to the car, which is integrated, efficient and affordable and provides access to services and facilities for those with disabilities and those in rural areas’.***

1.9. The RTS specified a number of principal initiatives to be undertaken over the period up to 2012. Those relating to public transport included:

- an upgrade of the existing rail network and services;
- the provision of new, modern trains and increased capacity;
- the introduction of quality bus corridors on all main commuter routes in Belfast;
- the provision of new, modern, accessible buses;
- the commencement of a rapid transit system within the Belfast metropolitan area;
- new bus services throughout the day in towns across Northern Ireland;

- a programme of bus-based park and ride provision (parking spaces and associated bus services); and
- the introduction of demand responsive transport services in rural areas.

1.10. The implementation framework for the delivery of the RTS consisted of two main elements:

- an overarching steering group – the Regional Transport Strategy Steering Group (RTSSG), supported by an external stakeholder advisory group (the Integrated Transport Stakeholder Group (ITSG)); and
- the development of three subsidiary transport plans for the key geographic areas making up the regional transport network:
  - a Belfast Metropolitan Transport Plan (BMTP), covering the Belfast Metropolitan Area, including rapid transit;
  - a Regional Strategic Transport Network Transport Plan (RSTNTP), covering the key road and rail network such as major road schemes and inter-urban bus and rail service levels; and
  - a Sub-regional Transport Plan (SRTP), covering rural areas and those urban areas outside Belfast.

## Part One: Introduction

1.11. In March 2012, the DRD published a new transport strategy "*Ensuring a Sustainable Transport Future: A New Approach to Regional Transportation*". The 'New Approach' identifies high level aims and strategic objectives for transport to guide decisions on strategic transport interventions for 2015-16 onwards. From April 2012 to March 2015, DRD continued to implement the RTS and associated plans.

- **Part 5** benchmarks local public transport performance against that in Great Britain, the Republic of Ireland and Europe.

1.13. We were assisted in the preparation of this report by Austin Smyth, a transport economist with wide national and international experience in the fields of policy formulation and delivery and regulatory structures, supplying the NIAO with benchmarking information and strategic advice.

### Scope and structure of our review

1.12. In the absence of a separate public transport strategy, this report will assess the effectiveness of public transport in Northern Ireland by reviewing performance against the public transport initiatives and targets outlined in the RTS (July 2002) for the period 2002 – 2012 (subsequently extended to 2015):

- **Part 2** examines the DRD's investment priorities for transport;
  - **Part 3** describes the governance and management arrangements established for public transport and their effectiveness in serving the public interest;
  - **Part 4** examines how well the Department has measured the performance of public transport and delivered on its strategic objectives; and
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## Part Two: The funding of public transport



## Part Two: The funding of public transport

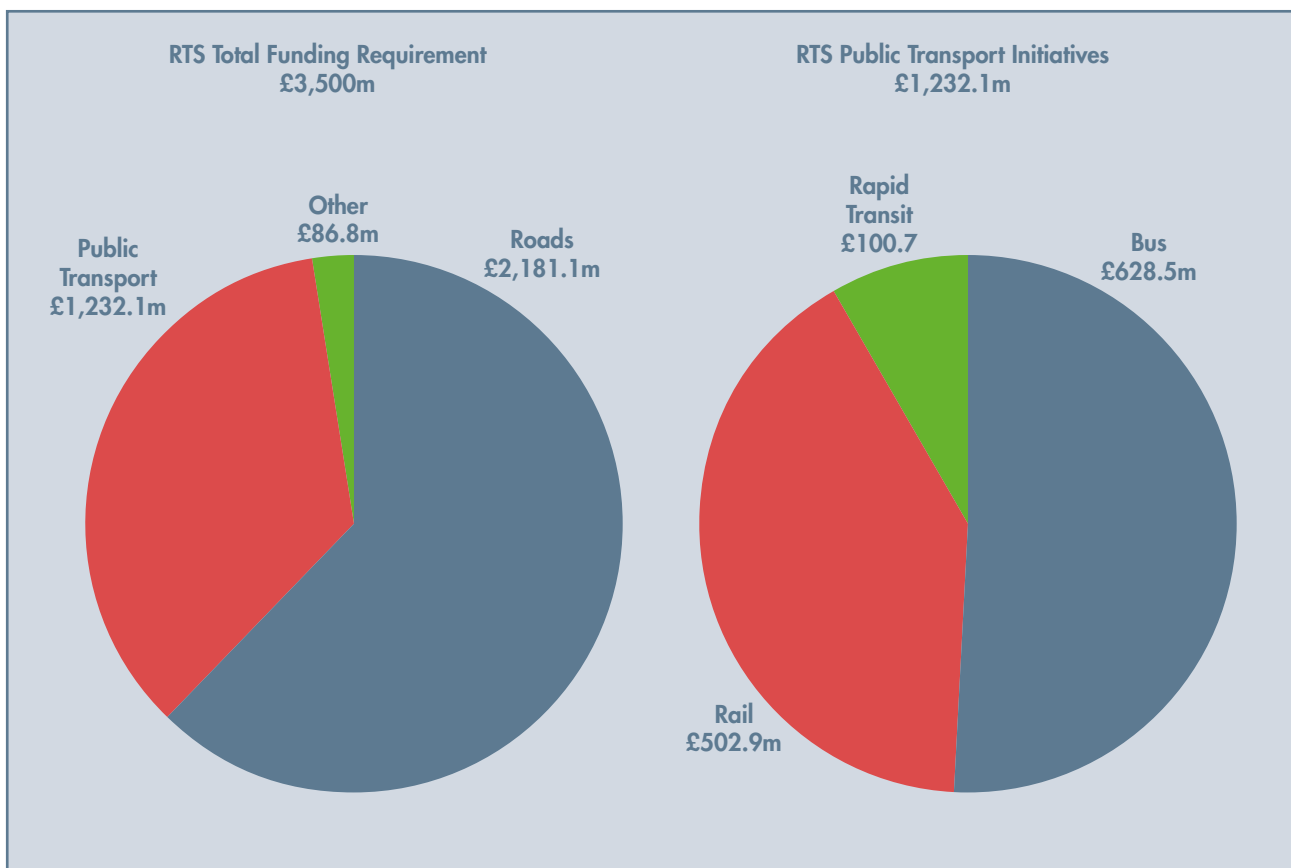
### The RTS planned to significantly increase public transport funding

2.1 The initiatives outlined in the RTS required an estimated £3,500 million (in 2002 - 03 prices) to implement and signalled an increase in the level of funding directed towards both roads and public transport. Public transport represented 35 per cent of the overall funding requirement (at £1,232 million), while roads made up 62 per cent (£2,181 million) – see **Figure 1**. The public transport investment was aimed at increasing the number of passenger journeys on public transport and

travellers deciding to switch from the use of their cars to taking buses and trains. Such a change in transport choice has become known as ‘modal shift’.

2.2 The majority of public transport funding under the RTS was for bus-related initiatives - £628.5 million. This included some £215.5 million in revenue support through fuel duty rebate and concessionary fares (£70 million and £145.5 million respectively). Rail-based initiatives totalled £502.9 million, which also included revenue support in the form of a public service obligation (£140 million) and concessionary fares (£18.5 million). The remainder was

**Figure 1: Overall and relative RTS funding (2002 to 2012)**



Source: RTS

for a rapid transit system in Belfast - £100.7 million. Further detail on the RTS's proposed funding is given at **Appendix 1**.

2.3 The increase in funding levels signalled in the RTS was reinforced through the Investment Strategy for Northern Ireland<sup>3</sup>, which was agreed by the Northern Ireland Executive and endorsed by the Northern Ireland Assembly in 2005. This identified capital investment in transport over the ten years to 2014-15 of over £2,500 million, signalling almost £560 million to public transport (22 per cent) (principally to the purchase of new buses and railway safety work). The Investment Strategy also identified around £2,000 million (78 per cent) towards road investment, supporting additional schemes over and above those included within the RTS. The later 2008-18 Investment Strategy also identified a similar focus towards roads<sup>4</sup>.

## Public transport spend between 2002-03 and 2011-12 fell short of that planned

2.4 The DRD's 2012 RTS monitoring report<sup>5</sup> indicates that actual expenditure over the 10 years to March 2012 exceeded planned expenditure by £392 million (calculated at 2002-03 prices). Within this, however, an additional £561 million was directed towards road-based schemes, in line with the Investment Strategy for Northern Ireland, while public transport received £124 million less than planned under RTS. As a result, this skewed the balance of funding away from public transport: instead of the 35:62 split intended under RTS (paragraph 2.1), the actual allocation between public transport and roads was 28:70. This is outlined in **Figure 2**.

**Figure 2: RTS - Planned/Actual Expenditure (2002-03 to 2011-12)**

	Planned Expenditure £m (2002-03 prices)	Planned Share of Funding %	Actual Expenditure £m (2002-03 prices)	Actual Share of Funding %
Roads	2,176.1	62.2	2,737.6	70.3
Public Transport	1,227.4 <sup>1</sup>	35.0	1,103.5	28.4
Walk/Cycle	86.5	2.5	50.2	1.3
All/Other <sup>1</sup>	10.0	0.3	0.6	0
<b>Total</b>	<b>3,500</b>	<b>100</b>	<b>3,891.9</b>	<b>100</b>

Source: RTS Monitoring Report (April 2007 – March 2012) amended to 2002 - 03 prices

Note: 1. All/Other costs incorporate research, monitoring and review which is applicable to all modes of transport. Therefore, the total costs above do not match those in **Figure 1**

3 Investment Strategy for Northern Ireland 2005-2015, Strategic Investment Board, 2005

4 The Investment Strategy for Northern Ireland 2008-18 indicated proposed investment in roads of £3,095 million and £725 million in public transport

5 Regional Transportation Strategy (RTS) for Northern Ireland: Monitoring Report 1 April 2007 to 31 March 2012, DRD, December 2012

## Part Two: The funding of public transport

2.5 **Figure 3** provides a summary of planned and actual public transport expenditure under RTS. It shows that:

- actual expenditure on rail initiatives was £92 million more than planned;
- actual expenditure on bus initiatives was almost £122 million less than planned, even though RTS favoured bus initiatives;
- only £3.8 million was spent on rapid transit;
- revenue support, particularly in relation to rail, significantly exceeded levels planned under RTS (around 50 per cent);
- expenditure in relation to the rail public service obligation exceeded the RTS estimate by £54 million;
- concessionary fare expenditure increased by around £50 million over original estimates (£27 million with regard to bus concessionary fares and £23 million in relation to rail concessionary fares); and
- an additional £13 million was also spent on bus fuel duty rebate.

The Department told us that some of the bus measures in the RTS were funded from roads budgets as part of major or minor improvement schemes, whilst others were achieved for less than the indicative estimates.



**Figure 3: RTS - Planned/Actual Public Transport Expenditure (2002-03 to 2011-12)**

	Planned Expenditure (at 2002-03 prices)		Actual Expenditure (at 2002-03 prices)	
	£m	£m	£m	£m
<b>Bus</b>		<b>625.8</b>		<b>506.4</b>
Main expenditure:				
Fuel Duty Rebate <sup>1</sup>	70.0		82.7	
Concessionary Fares <sup>2</sup>	145.5		172.1	
Bus Replacement	145.5		133.1	
<b>Rail</b>		<b>501.6</b>		<b>593.3</b>
Main expenditure:				
Public Service Obligation <sup>3</sup>	140.0		194.0 <sup>4</sup>	
Concessionary Fares <sup>2</sup>	18.5		42.1	
Railways Task Force <sup>5</sup>	129.0		133.0	
Replacement of Rolling Stock	11.4		92.0	
<b>Rapid Transit</b>		<b>100.0</b>		<b>3.8</b>
<b>Total Public Transport Expenditure</b>		<b>1,227.4</b>		<b>1,103.5</b>

Source: RTS Monitoring report (April 2007 – March 2012) amended to 2002 - 03 prices

Notes:

1. Fuel Duty, and as a consequence fuel duty rebate, has increased substantially since 2002
2. The concessionary fares scheme was expanded in 2008-09 to provide free transport on buses and trains within Northern Ireland for those aged between 60 and 65
3. The Public Service Obligation represents deficit funding to meet the shortfall between the revenue and operating costs of the provision of specified services which would otherwise not be provided
4. Enhanced timetabling and increased passengers since the introduction of new trains have required additional Public Service Obligation
5. The Railways Task Force review on the future of the railways in Northern Ireland (Sept 2000), together with an associated Strategic Safety Review (A D Little, March 2000), proposed the consolidation of the existing rail network and identified the need for significant investment in order to maintain that network

## Part Two: The funding of public transport

### Public transport remains relatively underfunded compared to Great Britain

2.6 **Figures 4 and 5** show that the extent of support for public transport and roads varies greatly across the United Kingdom. Despite the increase in public transport expenditure here over recent years, **Figure 4** shows that this investment has been much lower compared with other parts of the United Kingdom. **Figure 5** demonstrates that

until the recent dip in roads expenditure in 2011-12, the profile of expenditure on roads has increased significantly. The Department has told us that the balance of funding between roads and public transport here largely reflects the maintenance needs of the local road network and the fact that the rail network is less extensive than that of its United Kingdom counterparts, together with the need for significant investment in the strategic road network to build regional connectivity and address the legacy

**Figure 4: Public Transport Expenditure (per head) in Northern Ireland (2004-05 to 2012-13) compared to other United Kingdom regions**



Source: HM Treasury

of under investment over previous decades. The Department also takes the view that expenditure per kilometre of road length is a more appropriate measure of comparison because of the importance of maintenance expenditure. However, in our view, the analysis presented is appropriate and applies standard measures based on published HM Treasury data. The use of a supply side expenditure measure of road network is unlikely to encourage the intended re-balance towards public transport.

2.7 Whilst the RTS sought both to improve the existing highway network and to strengthen public transport provision, in practice there has not been a shift in the balance of funding away from road infrastructure in favour of public transport. In 2012-13, public transport represented around 28 per cent of overall transport expenditure against the 62:35 ratio identified in the RTS (see paragraph 2.1). Moreover, while the Department's 2013-14 Budget showed an

**Figure 5: Roads Expenditure (per head) in Northern Ireland (2004-05 to 2012-13) compared to other United Kingdom regions**



Source: HM Treasury

## Part Two: The funding of public transport

intended split between roads and public transport of 85:15<sup>6</sup>, this has been mitigated by a reduction in roads expenditure of £89 million (due to delays with the A5 scheme) leaving the ratio at 77:23.

2.8 The Department told us that Northern Ireland has twice as many road kilometres per head than the rest of the United Kingdom and that maintaining, developing and managing a 25,000 km road network valued at almost £30 billion requires adequate base funding. In 2013-14, some £198 million was necessary to maintain the network in serviceable condition (resurfacing, street lighting, winter maintenance etc.). When combined with ring-fenced capital spend on Strategic Road improvements that are an Executive priority, this represented 65 per cent of the roads budget. The Department also stated that previous comparisons with England, Scotland and Wales and the Republic of Ireland have shown that road maintenance expenditure in Northern Ireland is consistently, and usually significantly, lower than other areas for which comparable information is available<sup>7</sup>.

2.9 In our view, at recent and current levels, funding availability severely restricts the ability of the DRD to realise the policy aims set out in the RTS and its successor, the 'New Approach to Regional Transportation'. The DRD considers that the emerging Transport Delivery Plan for Budget 2016

(associated with the new strategy for 2015 onwards – see paragraph 1.11) will aim for a better balance in transport expenditure. The Department told us that the key aim of the 'New Approach' is to support strong sustainable growth for the benefit of all parts of Northern Ireland. In doing so, the objective-led approach recognises the need both to invest in the strategic road network to enhance regional connectivity whilst prioritising public transport investment to promote sustainable utilisation of that network. More recently, the Department's budget for 2015-16 highlights reductions in bus services. As bus services play a key part in the achievement of the Department's policy aspiration of a modal shift away from cars, such an outcome could undermine the credibility of the Department's strategy for public transport.

### Recommendation 1

**If public transport is to play a full role in contributing to the objectives established for it in the 'New Approach to Regional Transportation', there remains a continuing need for transport investment to be re-balanced to ensure that public transport becomes a more attractive alternative to private car travel. We have outlined how progress in bringing about modal shift has been limited to date. Reductions in the Department's budget for 2015-16, moreover, further threaten the credibility of its public transport strategy by impeding its ability to**

6 DRD Business Plan 2013-14: Annex D

7 Snaith, M.S. (2009): a Review of the Structural Maintenance Funding Requirements for the Roads Service

bring about the desired change as Translink is likely to face increasing difficulty in maintaining local bus services. Indeed, it is the Department's view that the limited investment in both rail and bus services in 2015-16 will make it difficult to maintain the rate of increase in passenger numbers experienced in recent years. In the face of these funding constraints, we recommend that, as a matter of urgency, the Department takes steps to develop sustainable solutions which focus on delivering most in terms of modal shift. It is also important that the Department takes steps to ensure that its vision for public transport continues to be supported in future budgets.

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# Part Three:

## Public transport structures in Northern Ireland





## Part Three:

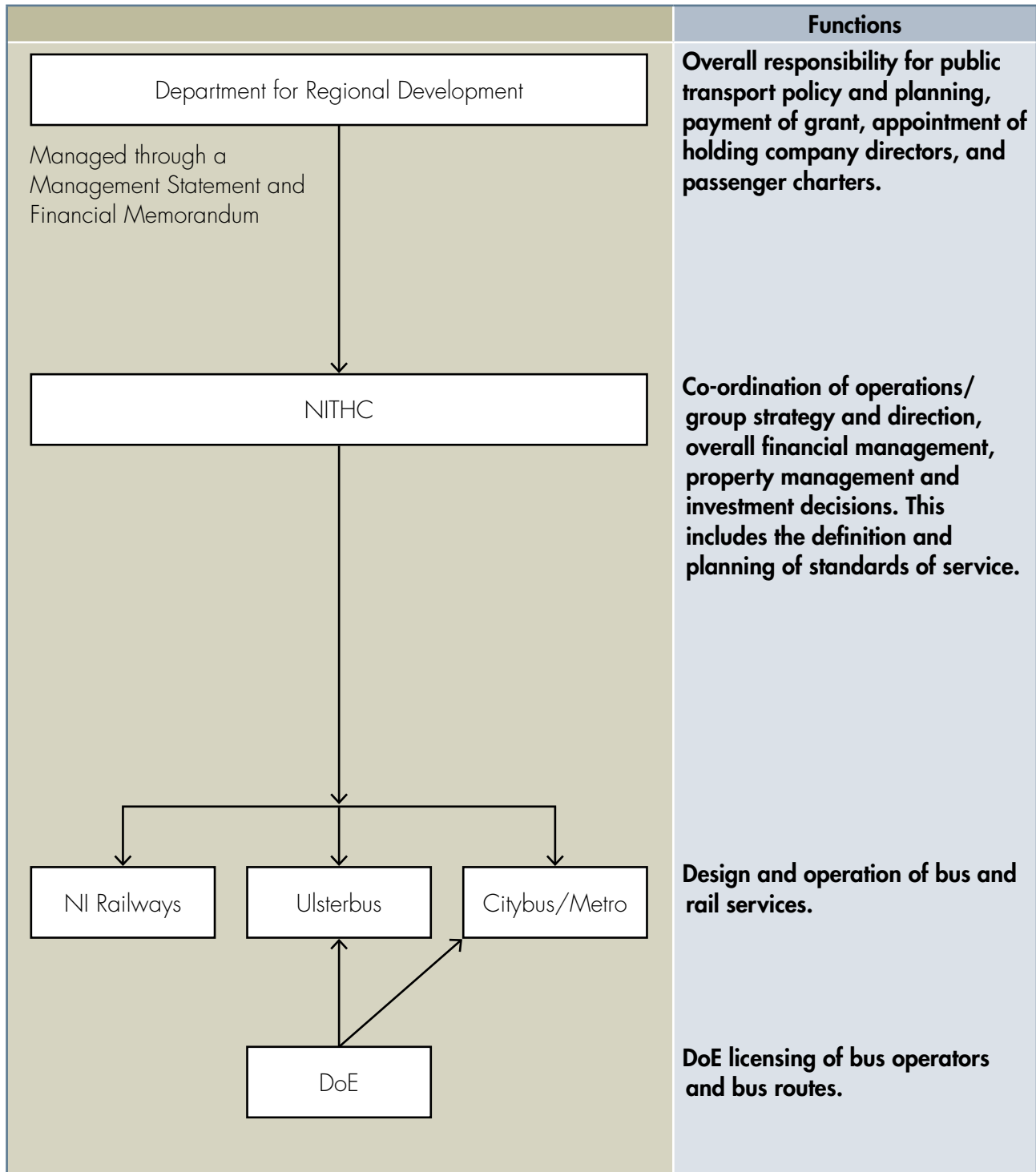
### Public transport structures in Northern Ireland

#### A new three-tier structure for public transport was proposed in 2009

- 3.1 At the time the RTS was published, in 2002, public transport structures in Northern Ireland were as illustrated at **Figure 6**. Broadly, the DRD had overall responsibility for public transport policy, planning and funding (through its Regional Planning and Transportation and Public Transport Performance Divisions), while delivery of the majority of public transport services was the responsibility of the NITHC and its subsidiaries. The Department of the Environment (DoE) also had a role in relation to public transport in licensing bus operators (regarding safety and operating standards) and bus routes, through its Driver and Vehicle Agency (DVA).
- 3.2 The relationship between the DRD and NITHC was governed through a Management Statement and Financial Memorandum, with oversight of the NITHC functions and performance, together with the provision of funding, carried out by the DRD's Public Transport Services Division. Within this structure, the Department placed heavy reliance on Translink to plan the public transport system, design the network and schedule and operate services.
- 3.3 Proposals for the revision of public transport structures were first outlined in a consultation paper, "A New Start for Public Transport in Northern Ireland" (September 2002). This 'new start', reflected not only the scale of additional investment identified in the RTS, but also building specialist skills to facilitate greater innovation and institutional/administrative reform. While retaining publicly provided and regulated public transport services, the establishment of an independent public transport regulatory body formed a key feature of the proposals. The creation of this 'arms length' body also reflected a desire to expose the public transport market to a degree of private sector involvement.
- 3.4 Consultation resulted in proposals for the development of a three-tier structure for public transport, as outlined in the Department's proposals for public transport reform in 2009<sup>8</sup>. This revised structure separates the policy and legislative functions of the Department, the authority-type functions of a 'Transport Agency' (those relating to the planning, funding and regulation), and the delivery functions of the public transport operator. In particular, the proposed 'Agency' was intended to provide an independent challenge function to the operator. In order to do so, it would require staff with appropriate public transport expertise.



**Figure 6: Delivery Structure for Public Transport in NI (at the time of the RTS)**



Source: DRD<sup>9</sup>

<sup>9</sup> This structure reflects a mix of information contained in DRD documents, mainly “A New Start for Public Transport in Northern Ireland: A Consultation Paper” (Sept 2002) and “Public Transport Reform Consultation: Detailed Policy Proposals” (Nov 2009)

## Part Three:

### Public transport structures in Northern Ireland

3.5 As a result of requirements under European Union regulations<sup>10</sup>, the new body would undertake new functions for the specification of service standards and the formalisation of contracts for the provision of regulated public transport services. Detail of the proposed three-tier structure is provided at **Appendix 2**.

#### The new approach was not adopted

3.6 When the DRD reorganised its internal structures in 2013, however, a separate agency was not implemented. Instead, the former Roads Service, which had been de-agentised<sup>11</sup> in April 2012 was merged with that element of the Department overseeing NITHC/Translink, to create a combined roads and public transport group - Transport NI. In broad terms, it was intended that Transport NI would carry out those public transport functions originally proposed for the 'Transport Agency'. In this regard, and subject to the introduction of further enabling legislation, the DRD intends to have a contract for the provision of public transport services with Translink in place in 2015, the length of which has still to be decided.

3.7 The revised public transport delivery framework put in place in 2013, therefore, differed in two main respects to that originally intended. Firstly, in terms of physical separation and degree of independence from the DRD – Transport NI is not a stand alone agency. Secondly, public transport authority functions were to be undertaken alongside other wider roads functions and responsibilities. Indeed, these public transport functions formed only a small part of Transport NI's overall responsibilities.

3.8 The DRD's justification for the implementation of the combined roads and public transport group within the Department, rather than the creation of a separate 'Transport Agency', was to:

- make the implementation of the RTS easier - setting responsibility in a single body and allowing for a more stream-lined and co-ordinated approach to transport planning issues (with Councils); and
- provide for effective governance and delivery of its public transport functions/services – affording greater flexibility in staff resources and budgets and allowing for a more effective delivery of overall priorities and objectives in the long run.

10 Regulation (EC) No 1370/2007 on public passenger transport services by rail and by road, European Union, 23 October 2007

11 The de-agentisation of Roads Service followed a wider trend in Northern Ireland to bring functions back into departments (for example the cases of the Planning Service returning within the DoE in April 2011 and Land and Property Services returning within the Department of Finance and Personnel in 2013)

This, however, was predicated on the development of a suitable mechanism to deal with the competing priorities of roads and public transport, to ensure against the dominance of the roads element.

3.9 The Northern Ireland Assembly's Committee for Regional Development, in its September 2013 report<sup>12</sup>, criticised the decision not to proceed with the *"agreed independent agency model"*. Specifically, the Committee stated its belief that the structures put in place significantly diluted the potential for a more co-ordinated, integrated and functional transport model and did not achieve the objectives identified during the consultation process.

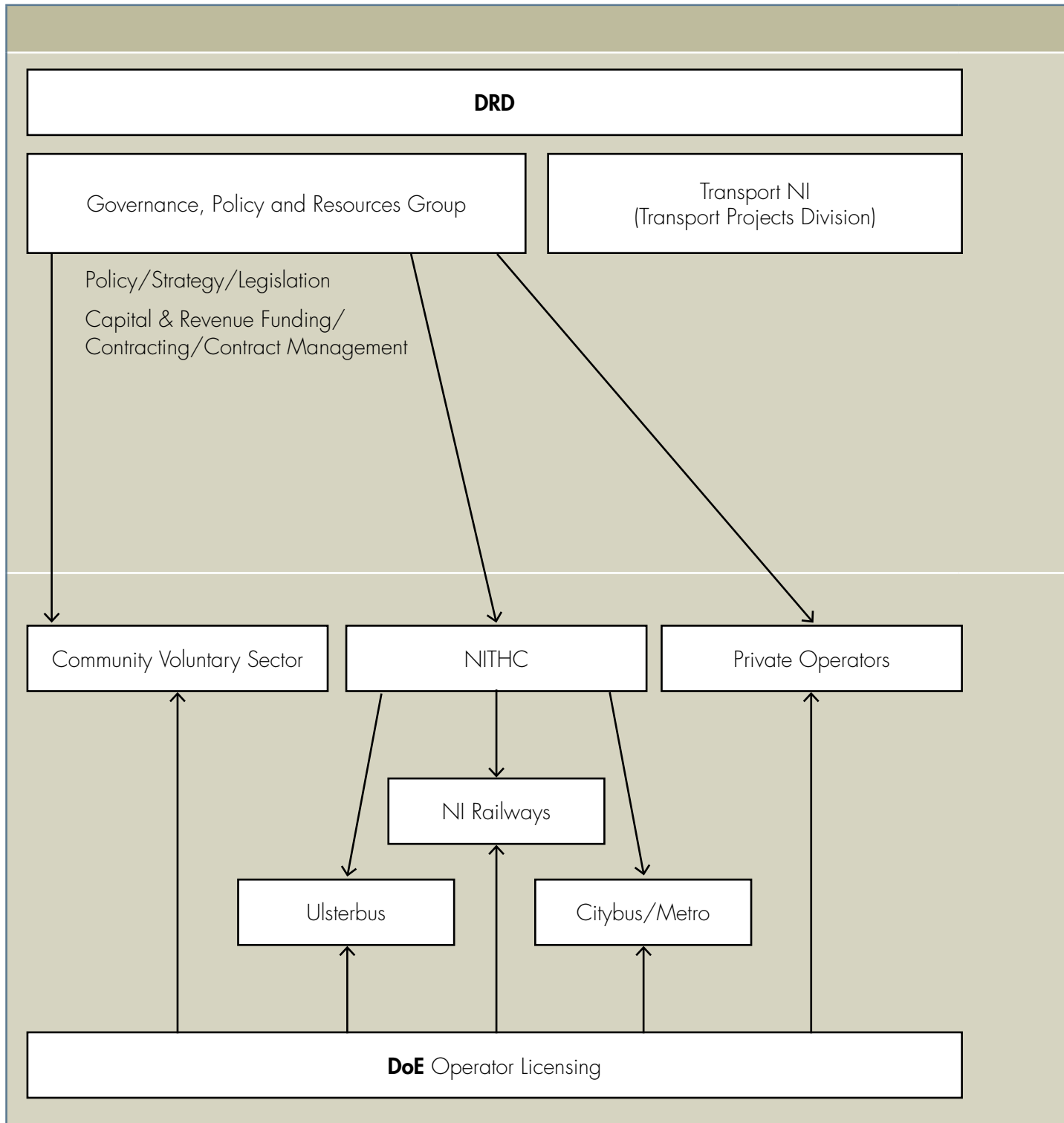
3.10 In April 2014, the DRD undertook a further reorganisation, transferring its public transport facing branches out of Transport NI and into its Governance, Policy and Resources Group, alongside its public transport strategy and policy functions. The only aspect of public transport remaining within Transport NI reflects those responsibilities undertaken through its Transport Projects Division, mainly the implementation of rapid transit and park and ride facilities. Current public transport structures are illustrated at **Figure 7**.

3.11 The Department told the NIAO that this most recent reorganisation was taken in light of prevailing budget restraint and in the interests of cost effectiveness in delivering the public transport reform programmes.

12 Northern Ireland Assembly Committee for Regional Development (Fifth Report of Session 2011-15, 18 September 2013), Report on the Inquiry into Comprehensive Transport Delivery Structures

## Part Three: Public transport structures in Northern Ireland

Figure 7: Current Public transport structures in Northern Ireland



Source: DRD

## Functions

### Governance, Policy and Resources Group

- Legislation and public transport policy
- Grant funding
- Strategic planning of public transport
- Manage public transport budget
- Commercial performance of NITHC/Translink
- Specify public transport service requirements
- Procure public transport services
- Award and manage contracts
- Control and report on performance of service delivery and transport plans
- Fund concessionary fares and fuel duty rebate schemes

- Specialist urban and rural transport schemes
- Regulate fare structures/levels
- Route regulation through commercial bus/service permits (when transferred from DoE)
- Operational policy and co-ordination of regional and local planning

### Transport NI

- Major transport projects
- Statutory consultee for land use planning
- Secure and manage developer contributions
- Belfast rapid transit
- Specify requirements for integrated ticketing

### NITHC

- Devise service/network plans and timetables
- Market/promote public transport
- Schedule and run bus and rail services, inc. contracted school transport
- Sell tickets/passes and handle reservations
- Manage/maintain trains, buses, track, signals and public rights of way
- Specify and procure fleet
- Manage and upgrade shared passenger facilities
- Provide customer information for all services

- Manage depots, engineering facilities and portfolio of operator-owned properties
- Manage and control health and safety
- Promote/market specific public transport services
- Deal with customers-information, complaints etc.
- Monitor contractual performance of public transport services inc. external suppliers
- Account for costs and revenues and report performance
- Operate byelaws, and fines and penalties

### DoE

- issue of operator/vehicle licences

## Part Three:

### Public transport structures in Northern Ireland

#### Northern Ireland's public transport structures differ from other parts of the United Kingdom and Ireland

3.12 In contrast to the widespread competition and deregulation of public transport operations within Great Britain, public transport in Northern Ireland remains fully regulated. Services are provided through a state owned operator with a virtual monopoly over operations. Arrangements in Northern Ireland are consistent with those elsewhere in Europe. In particular, they are similar to those existing in the Republic of Ireland.

3.13 For this reason, the NIAO researched, visited and held lengthy discussions with the National Transport Authority (NTA) in Ireland to identify and discuss its role in the regulation and control of public transport. Similarly, we also researched, visited and held discussions with Transport Scotland, as an example of a transport authority in Great Britain.

- regulation of public transport:
  - securing of public transport services through public service contracts (for rail and bus), together with performance monitoring
  - the licensing of bus passenger services/routes (where those services are not covered by a public service contract);
- passenger rights and fare regulation; and
- strategic planning of public transport.

3.15 The overall system is three-tiered, whereby the DTTS sets overall national policy for public transport, NTA implements it through its strategies, infrastructure investments and funding of services through contract, while the three state-owned operators (Dublin Bus, Bus Éireann and Irish Rail)<sup>13</sup> provide services.

#### National Transport Authority

3.14 The NTA is a statutory body, established under legislation in 2009, which operates under the aegis of the Department of Transport, Tourism and Sport (DTTS), although it is independent of the DTTS with its own Board structure and operates at 'arms length' from it. The NTA's main functions include:

- investment in public transport infrastructure;

#### Transport Scotland

3.16 Transport Scotland was created in 2006 as the national transport agency for Scotland. It is an agency of the Scottish Government and is accountable directly to Scottish Ministers, through its Chief Executive.

3.17 Since 2010, Transport Scotland has had sole responsibility for all national transport related issues across Scotland. It differs somewhat from the NTA in that

13 The NTA has plans to expose 10% of Dublin Bus and Bus Éireann routes to competition from 2016

its remit covers public transport, roads and other areas (such as aviation, ports, freight and canals). It devises and implements transport policy, and supports Scottish Government Ministers in prioritising future transport investment.

3.18 Transport Scotland's remit covers:

- developing and implementing transport policy (e.g. for bus and rail);
- the management of the Scotrail franchise;
- funding Network Rail's operations in Scotland;
- delivery of the National Concessionary Travel Scheme; and
- the management and maintenance of the trunk road network in Scotland, including the design and procurement of major road schemes.

3.19 The public transport system in Scotland reflects arrangements in place throughout Great Britain i.e. bus services are de-regulated and open to competition, with a franchise system operating in relation to rail services. Rail infrastructure is supported through Transport Scotland's funding of Network Rail (the body responsible for the maintenance and improvement of rail infrastructure). While the majority of bus services are financed by operators through fares, Transport

Scotland provides support through the National Concessionary Travel Scheme and a Bus Operators Grant<sup>14</sup>. Beyond this Local Authorities use their own funds to support locally necessary but non-viable services (i.e. those that would otherwise not be provided by private operators) through tendering for contracts.

3.20 In our view, the arrangements in both the Republic of Ireland and Scotland provide a level of independence, separation and operational freedom which does not exist in the Northern Ireland structure. Both organisations have Chief Executives who can 'champion' public transport needs and requirements to the relevant Government Departments. The Department told us that the equivalent post-holder in the DRD structure can similarly advocate and promote public transport in Northern Ireland.

### **DRD does not have the skills needed to effectively manage public transport in Northern Ireland**

3.21 Proposals for the creation of a public transport authority in Northern Ireland recognised the need for the body undertaking regulatory functions to be staffed by individuals with necessary skills and experience. In our view, such skills did not exist within the Department.

<sup>14</sup> The bus service operator's grant compensates operators in relation to the level of service provided (in terms of kilometres) and is payable at differing rates dependent on the type of vehicle or fuel used (i.e. applies environmental levers). It is deemed a benefit to passengers in reducing fares and, indirectly, allowing non-viable services to be provided

## Part Three:

### Public transport structures in Northern Ireland

3.22 Our discussions with NTA and Transport Scotland highlighted the need to build up the specialist skills necessary to undertake their public transport regulatory roles, in particular public transport planners, modellers, network designers, engineers and contracting/procurement professionals. While both organisations used consultants to supplement internal resources, they stressed the need for in-house expertise in all areas (at the least to be able to manage consultancy work).

3.23 As part of our work, and given the emphasis placed on professional expertise in public transport areas, we obtained details of the level of specialist qualifications/expertise among staff undertaking public transport roles in NTA and Transport Scotland. For comparison purposes we also obtained similar details from DRD. This is summarised at **Figure 8**.

3.24 While it is difficult to definitively compare and interpret data on the skill

**Figure 8: Level of specialist skilled staff in NTA, Transport Scotland and DRD**

Professional Area	Organisation		
	NTA	Transport Scotland	DRD
	FTEs	FTEs	FTEs
Network Operators	2	0	3 <sup>1</sup>
Road Engineers	13	87	138 <sup>2</sup>
Rail Engineers	2	5	0 <sup>3</sup>
Bus Engineers	1	0	2
Transport Planners	6	10	1
Land Use Planners	11	0	1
Economists	2	8	3
Legal	1	9	0 <sup>4</sup>
<b>Total Transport Specialists</b>	<b>38</b>	<b>119</b>	<b>148</b>

Source: NIAO

Notes: DRD provided some additional information in relation to its professional staff. This included:

- 1 The Network Operators figures is an amalgam of staff within the Public Transport Services Division and Transport Projects Division (none of whom have professional qualifications in transport related areas), making 3 Full Time Equivalents (Grade 5 @15% + 2 Grade 7s @20% + 4 Deputy Principals @20% + 1 Deputy Principal @ 100% + 4 Staff Officers @10%)
- 2 Roads Engineers (of whom 113 are Chartered Engineers and 25 are Graduate Engineers) work mostly on roads maintenance and on management and improvement of the roads network, which includes transportation schemes such as Park & Ride/Share, bus priority and active travel
- 3 Rail Engineers all employed directly by Translink
- 4 Legal support provided by the Departmental Solicitors Office



sets within each of these bodies due to the inherent differences in how each is structured and the range of functions they each serve, in absolute terms, at least, the data would strongly suggest that, unlike the roads sector, there is a shortage of specialist public transport skills within the Department. This is an issue also highlighted by the Assembly's Committee for Regional Development, in its 2013 report<sup>15</sup>.

- 3.25 The skills shortage must be addressed by the Department as it has the potential to leave the Department vulnerable in its ability to oversee NITHC/Translink. In addition, effective delivery of a re-balanced transport system requires skilled public transport planning professionals with the power to guide and drive best practice. We note that DRD has plans to supplement its skills base through the outsourcing of its transport planning and modelling activities under a managed framework arrangement. Contract notification, under European Union procurement arrangements, was issued in December 2013 and covered services in relation to transport modelling, transport policy and strategy formulation, transport scheme appraisal, local public transport planning and operation and transport data collection. The cost of these services is estimated at around £1.7 million over the three years of the contract, from 2014-15 onwards.

### **Recommendation 2**

**In our view, obtaining the necessary skills required to plan and deliver major public transport services poses real challenges for the effectiveness of the new structure established within the Department. Consultants can be used to provide these services, however, there is a risk that there will be insufficient residual knowledge within DRD to enable it to satisfactorily fulfil its responsibilities and to act as an informed customer capable of effectively holding NITHC/Translink to account. We recommend that DRD carries out on-going comparative research to benchmark the structure and performance of its Governance, Policy and Resources Group against other public transport functions in order to test if this model is optimal in terms of size, shape and required skills sets. These could include numbers / proportion of public transport staff with expertise and number of public transport staff per capita spend on public transport.**

<sup>15</sup> Northern Ireland Assembly Committee for Regional Development (Fifth Report of Session 2011-15, 18 September 2013), Report on the Inquiry into Comprehensive Transport Delivery Structures



# Part Four:

## Performance of public transport in Northern Ireland



## Part Four: Performance of public transport in Northern Ireland

### Public transport targets

4.1 In this part of the report we examine the performance of public transport by:

- identifying the targets set out in the RTS;
- highlighting targets for passenger journeys and assessing performance against them;
- identifying performance against other RTS targets;
- examining the impact of performance on modal shift; and
- exploring the impact of performance on the environment.

4.2 The RTS and the three subsidiary transport plans (see paragraph 1.10) identified key targets associated with planned investment in public transport (**Figure 9**). These targets broadly relate to passenger and service level increases, together with adherence to service standards and replacement of trains<sup>161718</sup>, and reflect a mixture of output and outcome measures.

4.3 While original RTS targets were to be achieved by 2012, transport plan targets aimed for achievement by 2015. However, RTS targets were not automatically extended to 2015.

4.4 A number of RTS targets were discontinued after 2012, including that related to the introduction of quality bus corridors. In particular, targets seeking increases in Citybus/Metro and rail patronage were also discontinued. DRD has, however, introduced wider targets relating to yearly overall Translink bus and rail passenger journeys for 2012-13, 2013-14 and 2014-15 (set to maintain levels at over 77 million, 80 million and 80.5 million respectively). Remaining RTS targets were rolled forward to 2015.

### Passenger journeys

4.5 As noted above at paragraph 4.2, the RTS set targets for increases in passengers on Metro and Northern Ireland Rail services. The Department did not set a target for Ulsterbus. In the absence of a target, we have assumed that passenger numbers were forecast to remain the same as 2000-01 levels. The Department told us that it does not consider this assumption to be appropriate. Ulsterbus passenger journeys were declining before 2002 and continued to do so throughout the RTS. By way of comparison, bus passenger journeys in Great Britain outside London fell by between 5.83 per cent between 2000-01 and 2011-12. While not specifically quantified, total passenger journeys expected under RTS by 31 March 2012 can be estimated at around 83 million (**Figure 10**).

16 Shaping our future: Regional Transportation Strategy 2002 - 2012 (July 2002) Part 7, figure 7.1

17 Belfast Metropolitan Transport Plan 2015 (November 2004), Part 11, Table 11.1

18 Regional Strategic Transport Network Transport Plan (March 2005), Part 6, Table 6.1

**Figure 9: Public Transport Targets in RTS and Associated Transport Plans**

RTS Targets	
Bus	Rail
<p><b>Citybus/Metro</b></p> <ul style="list-style-type: none"> <li>• Average vehicle age no more than 8 years (and no single bus older than 18 years)</li> <li>• 100% of buses accessible</li> <li>• Quality bus corridors on main (14) radial routes in Belfast</li> <li>• Patronage increase of 28% at mornings compared with 2001</li> <li>• Comply with Translink Passenger Charter (launched Dec 2001)*</li> </ul> <p><b>Ulsterbus</b></p> <ul style="list-style-type: none"> <li>• Average vehicle age no more than 8 years (and no single bus older than 18 years or Goldliner coach more than 12 years)</li> <li>• 100% of buses (and coaches) accessible</li> <li>• Comply with Translink Passenger Charter*</li> </ul>	<ul style="list-style-type: none"> <li>• Retain services north of Whitehead and north and north-west of Ballymena</li> <li>• All current trains to be replaced (with the exception of Enterprise services)</li> <li>• Patronage increase of 60% (excluding Enterprise services) compared to 2001</li> <li>• Comply with Translink Passenger Charter*</li> </ul>
Transport Plan Targets	
<ul style="list-style-type: none"> <li>• Morning peak bus speeds in the Belfast Metropolitan Area (BMA) road network on main radial routes to increase by 15% compared to 2001</li> <li>• Access to the public transport system - percentage of households in the BMA within 10 mins walk of a bus service to increase relative to 2001</li> <li>• Number of public transport trips made by bus, rail and rapid transit in the BMA, at morning peak, to increase (relative to 2001) by 28% for bus and 67% for rail</li> <li>• Car mode share of motorised journeys crossing the Belfast City Centre Cordon to reduce to 54% by 2015 (from 60% in 2001)</li> </ul>	

Source: *Regional Transport Strategy (RTS) Belfast Metropolitan Transport Plan, and Sub-regional Transport Plan*

Note: \* The Translink Passenger Charter identifies targets for reliability (services running as planned) and punctuality (services running on time)

## Part Four:

### Performance of public transport in Northern Ireland

**Figure 10: Expected Passenger Journeys per RTS**

	Passenger Journeys		
	2000-2001 (passenger journeys)	Increases identified in RTS	Expected Target (passenger journeys)
	million	Uplift (%)	million
<b>Metro</b>	20.3	33	27.0
<b>Ulsterbus</b>	46.8	–	46.8 <sup>1</sup>
<b>NI Rail</b>			
Cross-border	1.0	–	1.0
Domestic	4.9	60 <sup>2</sup>	7.8
<b>Total</b>	<b>5.9</b>		<b>8.8</b>
	<b>73.0</b>		<b>82.6</b>

Source: Regional Transport Strategy (RTS) and Northern Ireland Transport Holding Company (NITHC) Resource Position Reports

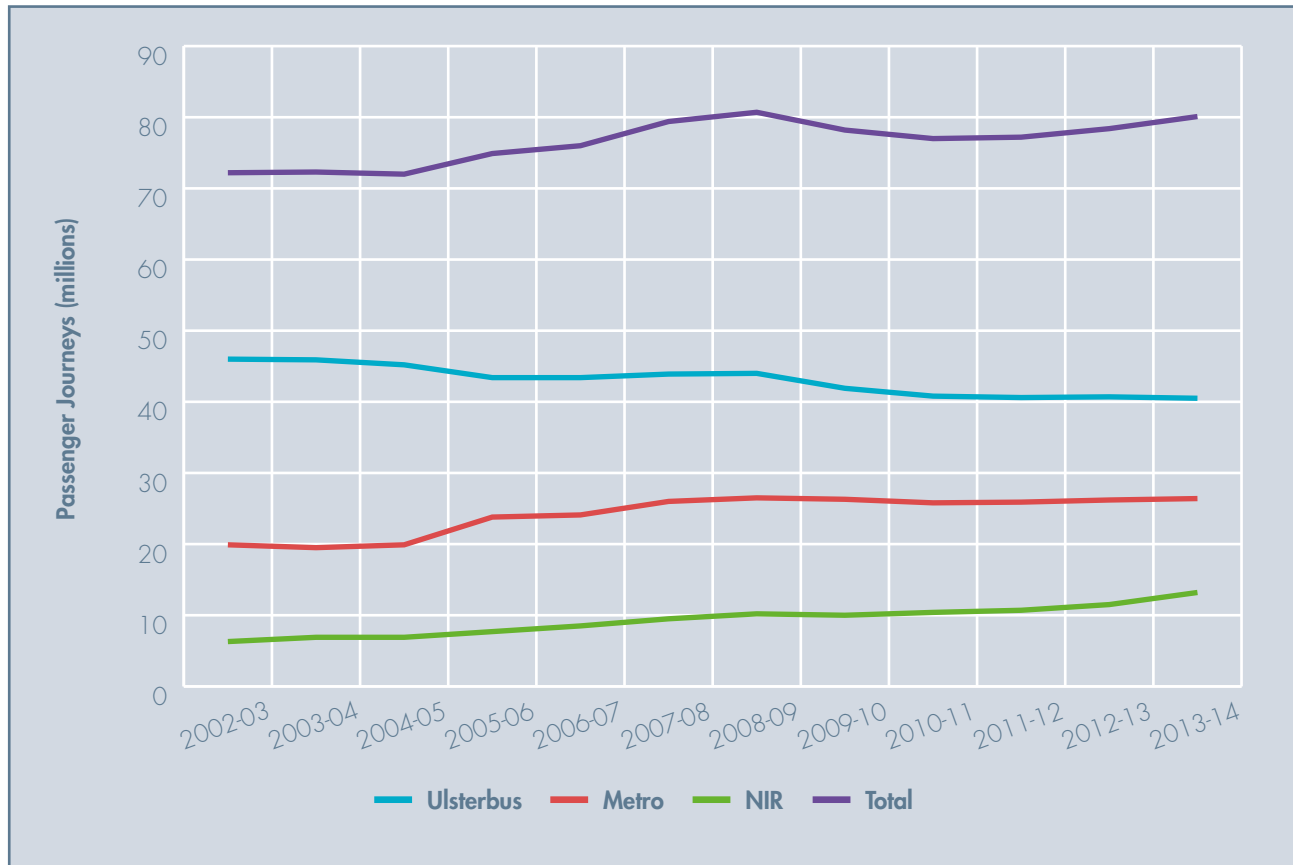
Notes:

1. In the absence of a target to increase Ulsterbus passenger journeys, it is assumed that these are intended to remain constant
2. The target for rail passenger increases excluded Enterprise cross-border services

4.6 **Figure 11** below shows the trend in passenger journeys over the period of the RTS and up to 31 March 2014. This identifies an upward trend in total passenger journeys. However, despite growth in total passenger journeys of 5.8 per cent to 2011-12, at 77.2 million, this fell short of RTS expectations (Figure 10 above) by some 5 million passenger journeys. Within this, overall bus patronage fell slightly, with a 6.2 million passenger decrease at Ulsterbus (to 40.6 million) balanced by an increase in Metro passengers of 5.6 million (to 25.9 million). Metro's increase, at 30 per cent, narrowly failed to achieve the 33 per cent uplift targeted under RTS. NI Railways passenger journeys, however, increased from 5.9 million to 10.7 million (or 81 per cent) over the period to 31 March 2012, exceeding RTS expectations, although

representing only around 14 per cent of total passenger journeys.

4.7 These trends in passenger journeys have continued after 2011-12 i.e. total levels increasing, with continued growth in rail passenger journeys and broadly constant bus passenger levels (within which falls at Ulsterbus are counteracted by increases at Metro). As a result, revised total passenger journey targets for 2012-13 and 2013-14, set in the DRD's Corporate Plans (see paragraph 4.4 above), have been achieved. In 2012-13 and 2013-14 there were 78.4 million and 80.1 million passenger journeys respectively. Overall, this represents an 11 per cent increase in passenger numbers between 2002-03 and 2013-14. More analysis of passenger journeys is provided at paragraph 4.9.

**Figure 11: Passenger Journeys by Public Transport (2002-03 to 2013-14)**

Source: Northern Ireland Transport Statistics

Note: In 2005, with the creation of Metro, a number of Ulsterbus routes were transferred to Metro. This has an impact on subsequent passenger figures.

4.8 The overall increase in passenger journeys to 31 March 2014 needs to be viewed in the context of population growth. The decade to 2011 witnessed the largest population growth since the 1960s. The 2011 Census revealed a population of 1.811 million – a 7.5 per

cent increase on 2001 (1.685 million). **Figure 12** shows that passenger journeys per head of population have remained virtually unchanged over 13 years, indicating that growth in passenger journeys over the period has simply kept pace with population growth.

**Figure 12: Passenger Journeys per Capita**

Year	Total Journeys (m)	Total Population (m)	Journeys per Capita
2001	73.0	1.68	43.45
2014	80.1	1.81*	44.25

Source: NIAO

Note: \* The 2011 Census figure used as a proxy



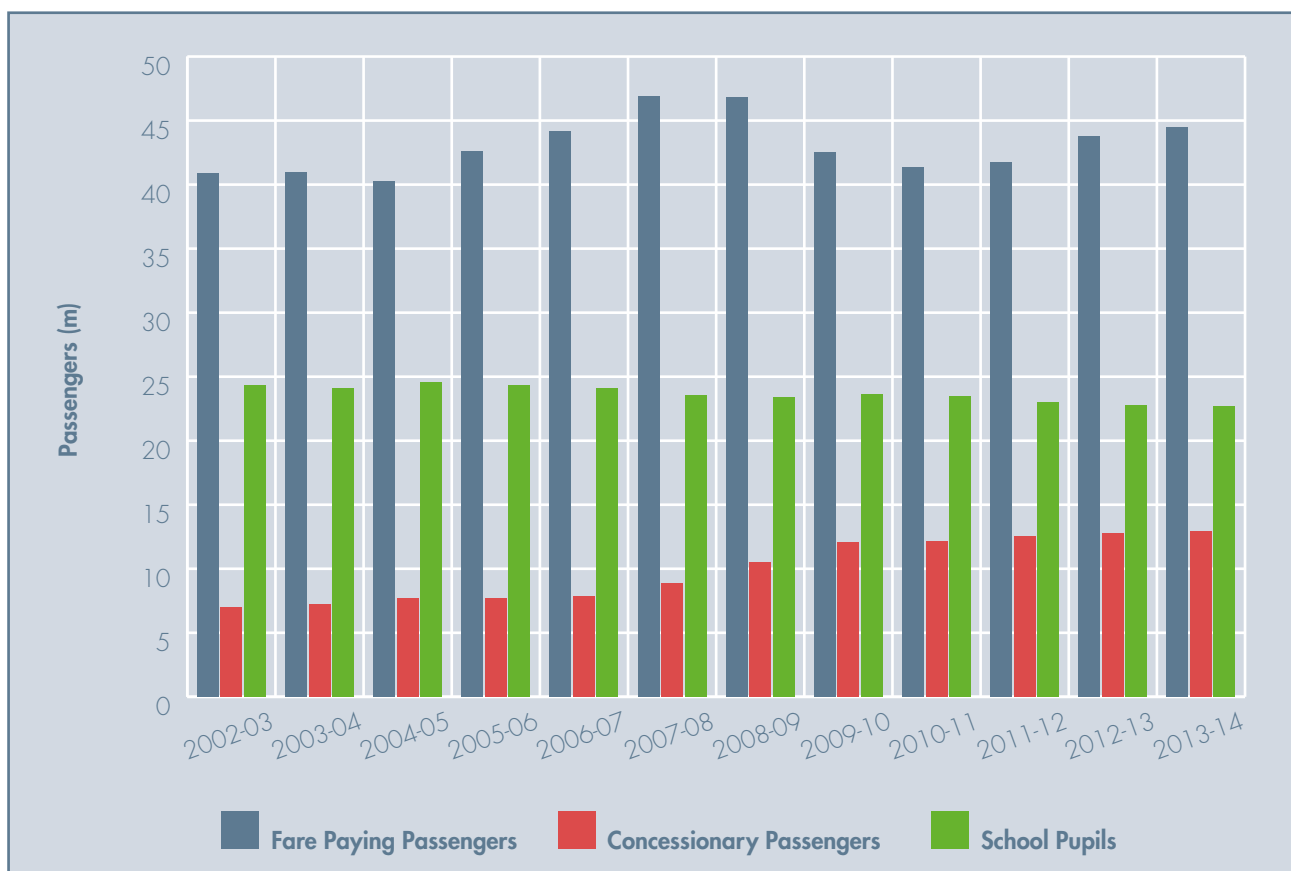
## Part Four: Performance of public transport in Northern Ireland

### Analysis by passenger type

4.9 While the longer term trend in public transport passenger numbers is upward, increasing by around 11 per cent (or 7.9 million) between 2002-03 and 2013-14, **Figure 13** below shows that, within the overall statistic, there have been fluctuations in the proportion of fare paying passengers. In particular, the proportion of passengers travelling on concessionary fares has increased, while school pupils have decreased.

4.10 Over the period 2002-03 to 2013-14, total fare paying passenger numbers have increased from 40.9 million to 44.5 million (an increase of 8.8 per cent). Fluctuations over time mean that the overall trend in the second half of this period (since 2007 - 08) has been downward – by around 5 percent (2.5 million) – although levels recovered somewhat in 2012-13 and 2013-14.

**Figure 13: Analysis of Passenger Type (2002-03 to 2013-14)**



Source: Northern Ireland Transport Holding Company (NITHC) Resource Position Reports 2007 - 2013

Note: The concessionary travel scheme was extended in 2008-09 to provide free travel for those aged between 60 and 65

4.11 Non-fare paying passenger numbers have increased from 31.4 million to 35.6 million (an increase of 13.4 per cent). This comprises an increase in concessionary fare passengers from 7.0 million to 13.0 million (86 per cent) and a fall in school transport numbers from 24.4 million to 22.7 million (7 per cent).

4.12 Looking at the three Translink companies separately:

- Metro has experienced an overall increase in passenger numbers between 2002-03 and 2013-14 (around 6.5 million or 33 per cent). A steep increase in passengers was experienced in 2005-06 (from 19.9 million in 2004-05 to 23.8 million), with the reorganisation of services in Belfast between Ulsterbus and Metro. Within its overall growth in passenger numbers, is an increase in fare paying passengers of some 4.5 million (30 per cent) and an increase in concessionary fares of 2.1 million (59 per cent). School pupils have remained broadly constant at 4.9 million. Since 2005-06, the majority of Metro's passenger growth has been through concessionary fares
- At Ulsterbus, there has been an overall fall of around 12 per cent (or 5.5 million) in passenger numbers over the period 2002-03 to 2013-14. A fall of some 4.9 million (25 per cent) in fare paying passengers has been mitigated by a significant increase in concessionary fare passengers (of 1.75 million or 49 per cent). The overall situation

has been accentuated by a fall in school passengers of around 2.4 million (or 11 per cent). In the case of Ulsterbus, school passengers represent approximately 50 per cent of all passengers

- In contrast, at NIR, overall passenger numbers have more than doubled in the period 2002 - 03 to 2013 - 14 (representing an additional 6.9 million passengers (or 110 per cent)). While this does include an increase in fare paying passengers of around 3.9 million (or by 62 per cent), around one third of the increase in passenger numbers since 2004-05<sup>19</sup> (1.7 million passengers) results from a significant growth in concessionary fare passengers.

4.13 While the numbers using public transport have increased over time, and particularly on the rail network, in recent years the majority of growth has resulted from concessionary fare passengers. In our view, the resourcing of concessionary fare passengers distorts the market somewhat and although public transport should indeed have a "public service" element, over-concentration on this aspect may hinder its ability to achieve the desired modal shift.

4.14 DRD told us that, in its view, the free travel scheme has helped to increase public transport usage by the 60+ age group, and that in preserving and enhancing the viability of the public transport network, the scheme has helped to attract new paying

19 Analysis of rail concessionary fare passengers was not available prior to 2004-05

## Part Four:

### Performance of public transport in Northern Ireland

passengers. In our view, while free travel has certainly helped to grow public transport patronage, the evidence from passenger journey data would suggest that the scheme's impact has been marginal. In particular, the overall level of fare paying passengers travelling by bus (both Metro and Ulsterbus), which constitutes the vast majority of public transport in Northern Ireland, has decreased over time.

#### Recommendation 3

**It is clear that increased effort must be directed towards getting more people on public transport if the policy direction set by the Department is to be satisfactorily achieved. DRD must ensure that it has the capability to understand public transport demand and the causes of failure to move more rapidly in this direction. Supported by a set of ambitious targets geared towards increasing public transport patronage, we recommend that the Department takes steps to research, develop and monitor behaviour change measures in order to successfully encourage people to switch to public transport.**

#### Performance against targets

4.15 The following paragraphs identify performance against the RTS and related transport plan targets, other than those relating to passenger numbers. Where, as noted earlier (see paragraph 4.4) the target was discontinued after 2012, performance has been measured at 2011-12. All other targets are measured as at 31 March 2014.

Full details are included at **Appendix 3**. Of the 23 targets set, 18 have been achieved, 4 are on target for achievement and 1 target will not be met.

#### Bus age and accessibility

4.16 All targets in this area were met with the exception of:

- Metro average bus age was 8.18 years against a target of 8 years. However, 54 new buses are to be delivered in 2014 - 15, reducing the average age of the fleet to 6.17 years.

#### Quality Bus Corridors (QBCs)

4.17 The target of 14 QBCs on the main radial routes in Belfast, by 2012, was met. At 31 March 2012, eight of the fourteen QBCs have been launched and six other routes are operating as QBCs although not officially launched. This target was discontinued after 2012.

#### Bus and train punctuality and reliability

4.18 All Translink's reliability targets have been met. However, as at 31 March 2014, punctuality targets have not been met - 88.5 per cent of Metro services and 94 per cent of Ulsterbus services arrived no more than 7 minutes late (against a target of 95 per cent).

- 4.19 Translink monitoring excludes cancellations and delays which are deemed outside its control. As indicated, buses are considered to arrive 'on time' even if they arrive up to 7 minutes late and rail services are considered 'on time' if they arrive up to 5 or 10 minutes late, depending on which line the service is operating. The DRD has indicated that this methodology follows industry guidance. Linked to this, current punctuality and reliability monitoring includes only a twice yearly survey over an eight week period and within this, with the exception of some Ulsterbus routes, monitoring only compares starting point departure time and arrival times at final destination with scheduled times. Translink has advised that immediate timing points are already included in the monitoring process for longer Ulsterbus journeys. Otherwise, intermediate stopping points on other journeys are not monitored.
- 4.20 Therefore, Translink's punctuality and reliability figures may not match passenger's experience in that late buses and trains are being deemed on time when this is clearly not the case in many instances. This is also borne out in our benchmarking work in this area (see paragraph 5.32) where Metro customers' satisfaction levels regarding punctuality ranked fifth when compared to 6 other bus operating companies in Great Britain.

#### **Recommendation 4**

**The robustness of Translink's measurement of punctuality and reliability targets should be improved. Translink should measure and report performance both inclusive and exclusive of delays outside its control and also measure and report timings on intermediate points on journeys rather than only starting and finishing points.**

#### **Specific NIR targets**

- 4.21 The target to retain services north of Whitehead and north-west of Ballymena was achieved. Similarly, the target to replace all Class 80 and Class 450 trains by 2012 was also achieved.

#### **Belfast Metropolitan Transport Plan (BMTP)**

- 4.22 One of the three plans linked to the RTS, the BMTP, had a number of public transport related targets. These covered bus speeds in Belfast, the implementation of a rapid transit system, the level of cars travelling into the City and access to public transport.

## Part Four:

### Performance of public transport in Northern Ireland

#### Morning peak bus speeds

4.23 Although there are now 14 QBCs operating on the main radial routes into Belfast, morning peak bus speeds have declined since 2001. It was planned that morning peak bus speeds on the Belfast Metropolitan Area main radial routes would increase by 15 per cent compared to 2001. In reality, bus speeds have decreased by 19 per cent<sup>20</sup>.

#### Rapid transit services

4.24 It was originally intended to introduce rapid transit services connecting East Belfast, West Belfast and Titanic Quarter via the city centre by 31 March 2012. This target has not been achieved. By 31 March 2013, the Outline Business Case was completed and approved. DRD told us that implementation was delayed due to the need to revisit the project approach as a result of a change in economic circumstances<sup>21</sup> and overarching policy (i.e. the revision of the RTS). It is now anticipated that rapid transit services will be operational by Autumn 2017.

#### Access to public transport

4.25 The BMTP set a target for access to public transport, seeking to increase the percentage of households in the Belfast Metropolitan Area within 10

minutes walk of a bus stop over levels in 2001. However, as no 2001 baseline had been produced, and because of Translink's inability to secure and maintain software upon which calculations were based, the target was abandoned after 2007.

#### Mode of transport share in Belfast

4.26 The BMTP forecast that the proportion of cars crossing a Belfast City Centre cordon would reduce slightly from 60 per cent in 2001 to 54 per cent in 2015. The 2013 Belfast cordon survey reported a figure of 50.2 per cent. The Department told us that an April 2014 Impact Study, following completion of the Belfast on the Move project showed that 47 per cent of people entering Belfast City Centre in the morning peak in October 2013 did so by private car, compared to 53 per cent in 2011.

4.27 It was also predicted that the proportion of public transport trips made by Metro in the morning peak would increase by 28 per cent compared to 2005. At 31 March 2014, this figure had increased by 32.9 per cent.

4.28 In addition, the number of public transport trips made by rail in the morning peak was expected to increase by 67 per cent compared to 2001. This target has been achieved – the increase at 31 March 2014 was 114.4 per cent.

20 This figures differs from that reported by DRD (see Appendix 3) as the average speed is calculated on a smaller number of routes (those used to calculate the 2001 baseline)

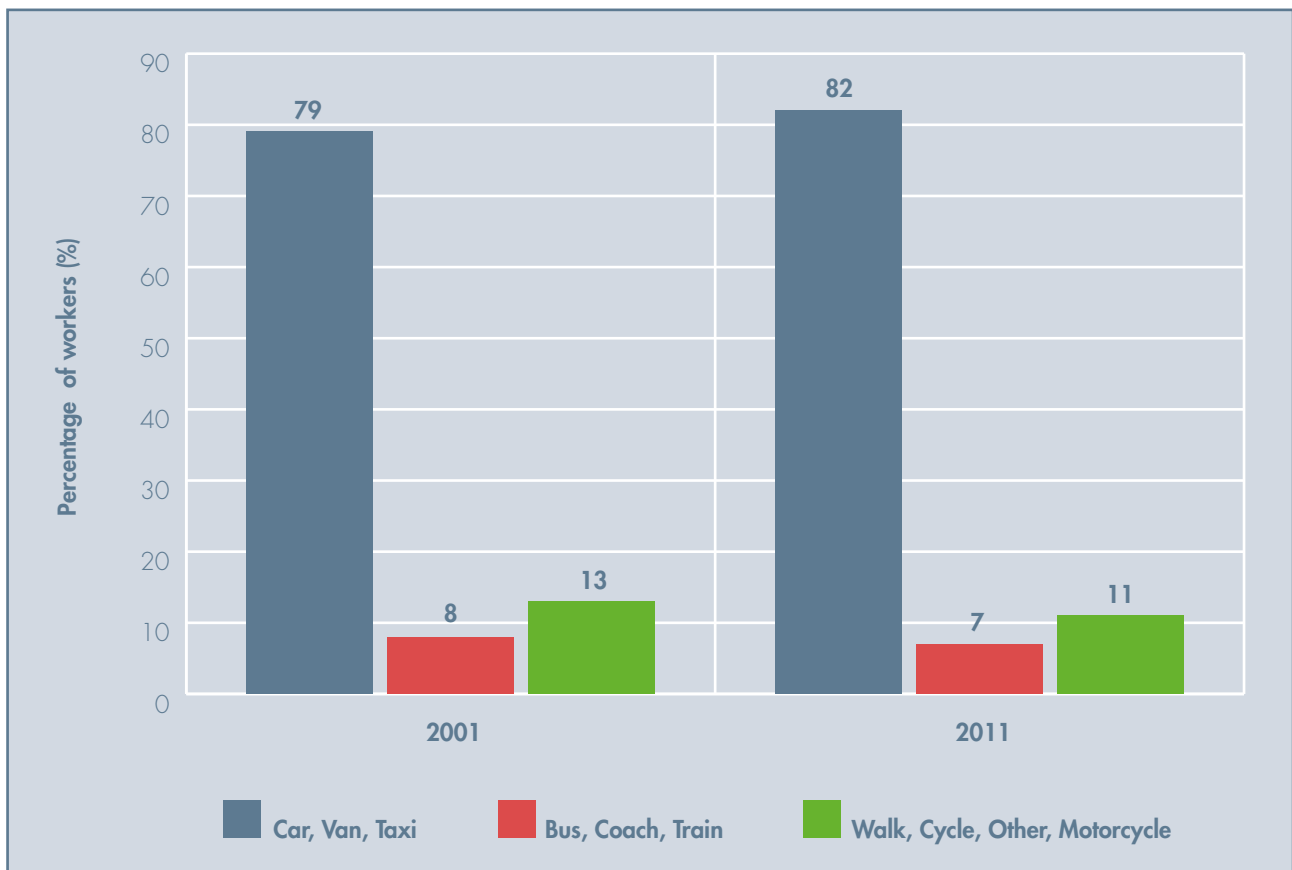
21 The RTS estimated the cost of Rapid Transit at £100m (at 2002 prices). The Department's strategic outline business case, in 2008, estimated costs at £147m (at 2007 prices). The latest estimate, in the 2012 Outline Business Case estimated costs at £98.5m (at 2012 prices)

## The impact of performance on modal shift

4.29 Despite RTS and the relative increase in investment, **Figure 14** demonstrates that public transport's share of work related trips decreased slightly during the first decade of the new millennium

– dropping from 8 per cent in 2001 to 7 per cent in 2011. This is in contrast to Great Britain where overall there has been a small move towards the use of public transport. **Figure 15** illustrates this point.

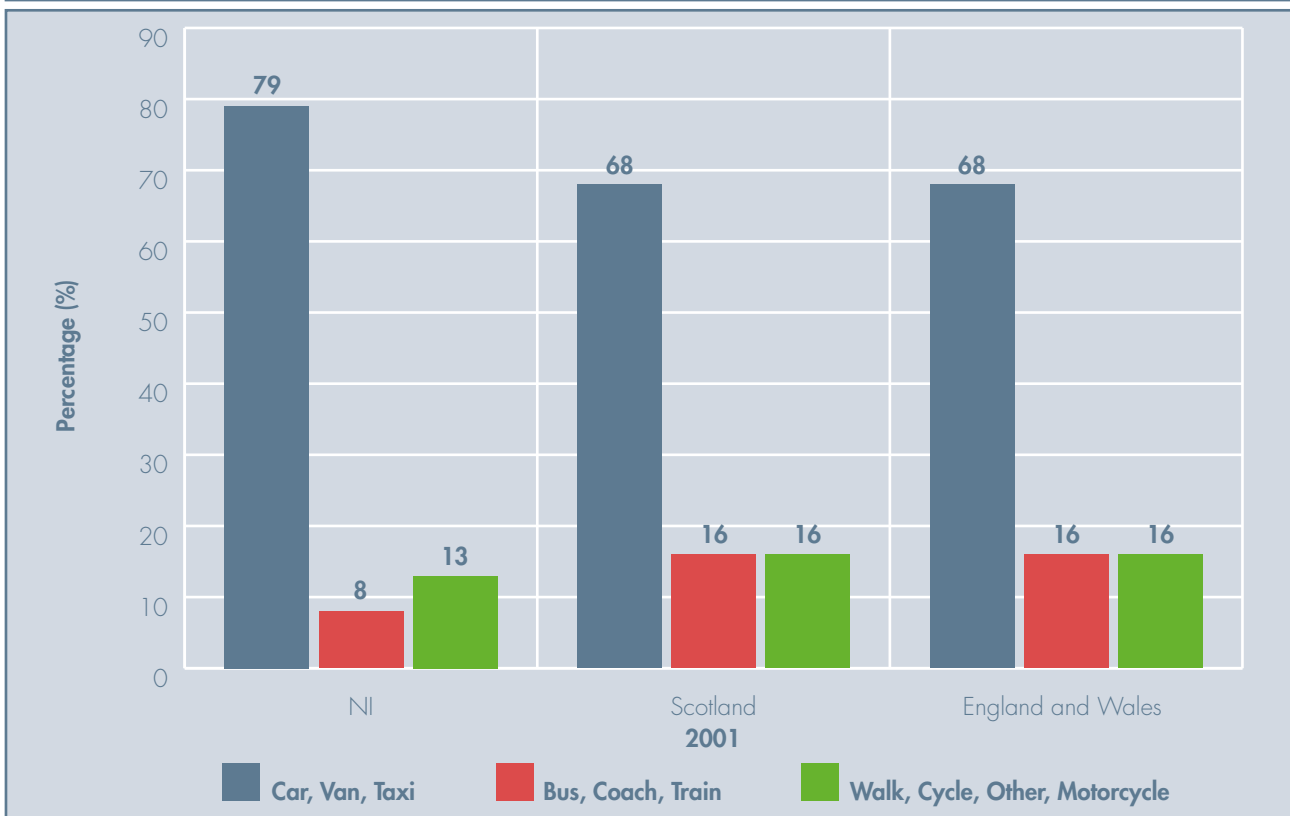
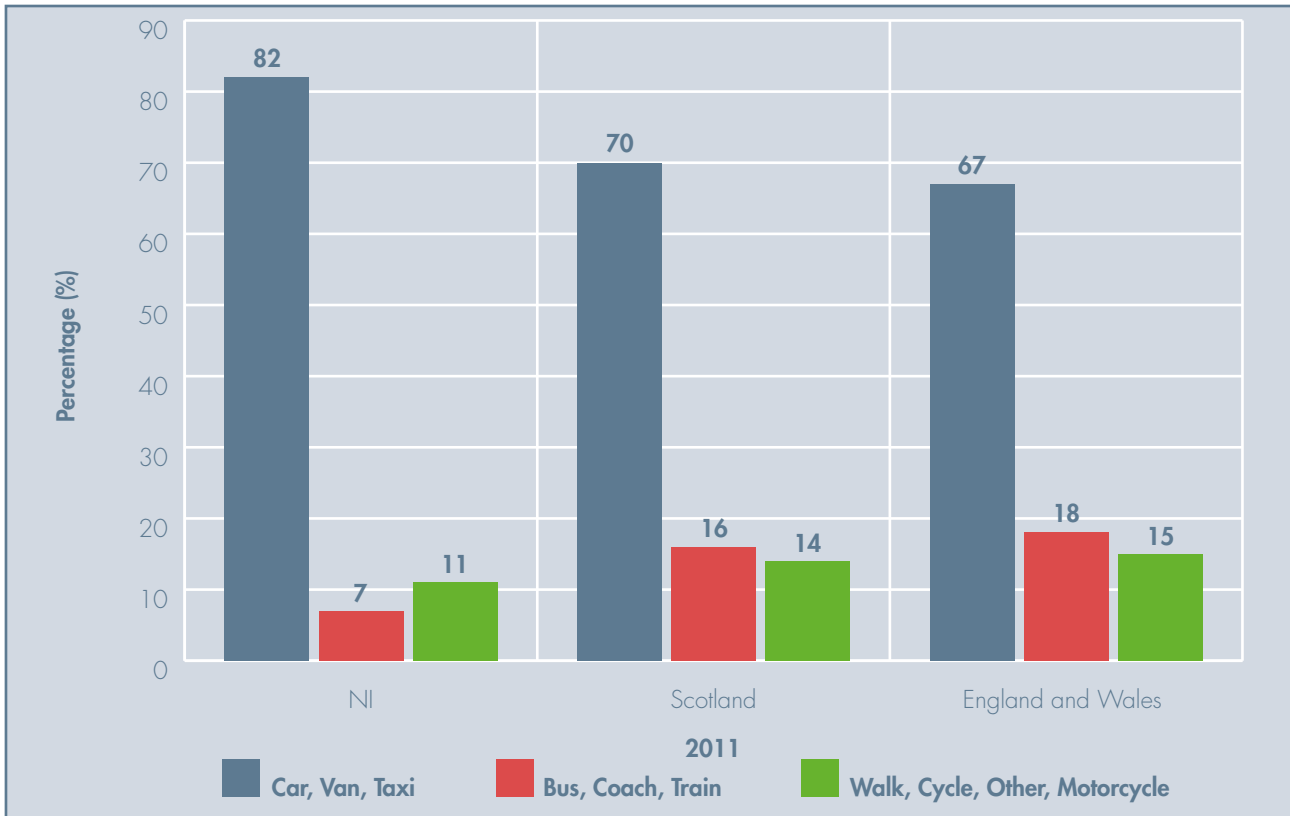
**Figure 14: Methods of Travel to work in Northern Ireland: 2011 compared to 2001**



Source: Northern Ireland Census 2001 and 2011

## Part Four: Performance of public transport in Northern Ireland

Figure 15: Methods of Travel to Work in Northern Ireland compared to Great Britain: 2011 compared to 2001



Source: Northern Ireland Census 2001 and 2011, Scotland Census 2001 and 2011 and Census for England and Wales 2001 and 2011



- 4.30 In the first decade of this century, Northern Ireland's car dominance has strengthened. In the rest of the United Kingdom, the experience of modal shift is mixed. In Scotland, similar to Northern Ireland, use of the car has increased, although without a drop in use of public transport. In England and Wales, however, there has been a small modal shift away from the car and towards public transport.
- 4.31 Increasing modal shift from cars, particularly from single-occupancy vehicles, towards public transport alternatives is a key theme running through transport policy here. However, in our view, attracting greater numbers of car users to public transport and maintaining acceptable levels of public transport passengers will require a much better understanding of demand in terms of the attitudes and behaviour of the potential passengers.

#### **Recommendation 5**

**More recognition needs to be given to modal shift and how to achieve it. We recommend that the Department sets consistent and coherent targets over a defined period for modal shift which state clearly what its priorities are in order to enable more rigorous and objective measurement of its progress in meeting them.**

#### **Recommendation 6**

**Comparing other jurisdictions performance on modal shift is a useful way of benchmarking Northern Ireland's results in this area.**

**Benchmarking can assist local policymakers to assess the experience of better performing peers and identify locally adaptable solutions that, over time, will bring local performance up to that of best performers.**

#### **The impact of car parking on modal shift**

- 4.32 The cost and availability of a parking space are important factors in determining whether an individual makes the decision to drive to a particular location, chooses an alternative mode of travel, or decides whether to own a car in the first place. As a result, control over the availability of parking spaces is a widely accepted and commonly applied approach to limiting the level of car trips to city and town centres.
- 4.33 The RTS recognised the need for policies in relation to the supply of car parking to complement other initiatives, such as park and ride schemes. The BMTP recognised the need to limit car parking and introduced proposals to reduce long-stay parking and to eliminate long-stay on-street parking. However, car parking surveys undertaken by the DRD over the period 2007 to 2013<sup>22</sup> identified an upward trend in the number of publicly available car parking spaces, both on and off-street (increasing from 12,010 spaces in 2007 to 13,708 in 2013). This increase reflects the opening

## Part Four:

### Performance of public transport in Northern Ireland

of major retail outlets e.g. Victoria Square and St Anne's Square developments.

4.34 DRD's Strategic Review of Park and Ride (2011) noted significant concerns about the impact of parking availability (particularly in Belfast) on the success of Park and Ride projects. It pointed out that the promotion of car parks had a direct and negative impact on public transport use. It also highlighted the lack of progress made against BMTP proposals for a reduction in long-stay car parking. It showed that no progress had been made in eliminating long-stay on-street parking, and that there was limited evidence of a reduction of off-street long stay spaces, contrary to the targeted reduction of 4,000 by 2015.

4.35 While the Department was unable to provide up to date specific detail as to the number of long and short-stay spaces in Belfast City Centre, extrapolation of duration of stay analysis contained in the 2013 Belfast Parking Survey suggests that there has been no major change to the position identified at 2010 (in the Strategic Review of Park and Ride). On-street long-stay parking has not been eliminated; indeed it appears to have increased. There is, however, some indication of a fall in the level of off-street long-stay parking, although this remains short of targeted levels.

4.36 Overall parking supply is made up of those spaces that are publicly available i.e. that can be used by the general public, together with private non-

residential spaces (PNR) – including that leased for private use or provided in conjunction with business premises. The Department estimates that the level of PNR parking in Belfast City Centre is in the region of 6,850 spaces. Given the 13,700 publicly available spaces identified at paragraph 4.33, this suggests that the overall parking supply in Belfast is around 20,500 spaces, and that PNR represents about one-third of this overall supply.

4.37 The provision of greater levels of car parking (whether publicly available or PNR) encourages car usage, discourages the use of public transport, impinges on the impact of park and ride schemes and increases traffic congestion at peak times.

#### Recommendation 7

**The extent of the availability of Belfast City Centre car parking spaces highlights the need to ensure that policy on parking is consistent with the aims of promoting sustainable public transport choices and reducing reliance on the car. In managing its parking stock, while it is important that the Department and the Belfast City Council reflect the economic and social conditions in Belfast, we recommend that they take steps to ensure that this is done within a workable framework that provides a level of consistency with public transport policy.**

## The impact of transport on the environment

- 4.38 The Climate Change Act (2008) sets a long term framework for the United Kingdom to reduce its Green House Gas (GHG) emissions. Although there are no clear targets set for Northern Ireland, the Programme for Government 2011- 2015 has set a target to continue to work towards a reduction in GHG emissions by at least 35 per cent on 1990 levels by 2025. All government departments bear a collective responsibility to achieve this target, none more so than DRD, given its role in the oversight of transport.
- 4.39 While expenditure on roads dominates DRD expenditure, car use will increase. As road traffic is one of the largest contributors to GHG emissions, levels will increase and Government reduction targets are less likely to be attained.

in our view, in terms of the objectives established for public transport, outcomes are not comprehensively and systematically measured or managed.

### Recommendation 8

**In order to ensure continuous improvement in the delivery of public transport services, we recommend that the DRD reviews its approach to performance measurement in order to establish targets, from baseline data, which are linked to tangible outcomes reflecting the objectives set in the 'New Approach to Regional Transportation'.**

## Conclusions on performance measurement

- 4.40 While the Department has performed well against many of the targets set in the RTS and its subsidiary transport plans, the current performance management framework does not provide a complete picture of whether objectives are being achieved. The performance measures in place are a mixture of output (e.g. train replacement, creation of quality bus corridors) and outcome measures (e.g. increases in bus speeds, increases in passenger journeys and bus accessibility levels). However,



Part Five:  
Benchmarking the performance of public transport



## Part Five: Benchmarking the performance of public transport

5.1 In this part of the report we outline benchmarking work in the area of public transport. It covers:

- reviewing benchmarking work carried out by others on aspects of efficiency; and
- our own benchmarking work on outcomes from public transport, including levels and quality of service, passenger satisfaction and ridership.

5.2 The process of benchmarking in relation to public transport is about comparing local performance on a number of measures in order to provide transport managers with useful insight about performance here relative to peers and about possible ways in which performance may be improved. Drawing and expanding on the measures of performance discussed at **Part 4**, we have benchmarked the efficiency of local public transport buses and trains with counterparts in England, Scotland, Wales, and the Republic of Ireland. In addition, we have also benchmarked local outcomes with a selection of European cities, comparable in size and nature to Belfast. For the Metro operation in the Belfast area, the choice of comparator areas within the United Kingdom was made to ensure maximum indicator coverage and consistency with DRD's Review of the Outline Business Case for Public Transport Reform (December 2010) and its report on Translink Benchmarking (November 2013). Similarly, for

Ulsterbus operation outside the Metro area, the choice of comparator areas within the United Kingdom was made to ensure maximum indicator coverage and consistency with the DRD's above noted report on Translink Benchmarking (November 2013).

### Previous benchmarking on bus service efficiency showed a mixed picture

5.3 In 2009, the Department commissioned consultants to prepare an Outline Business Case for Public Transport Reform. This was reviewed in 2010, following public consultation on Public Transport Reform, and a Final Report was provided in December 2010. The Final Report compared the performance of Metro and Ulsterbus with bus companies in the rest of the United Kingdom (and NIR with the rail operations in the Republic of Ireland) and contained tables showing the operating cost per bus passenger journey and the average cost per vehicle kilometre for both Metro and Ulsterbus. The results for Metro were compared to English PTE<sup>23</sup> areas (and to Scotland and Wales in the case of the average cost per vehicle kilometre) and those for Ulsterbus were compared to English non-PTE areas, Scotland and Wales in order to assess the relative performance of the Translink subsidiaries. It also benchmarked Metro to a number of specified operators in British cities similar in size to Belfast, across a number of key financial, staffing and

23 Passenger Transport Executives (PTEs) are local government bodies in Britain which are responsible for public transport within large urban areas

operational performance indicators. The same indicators were used to benchmark the performance of Ulsterbus with operators in non-metropolitan areas in England and Wales.

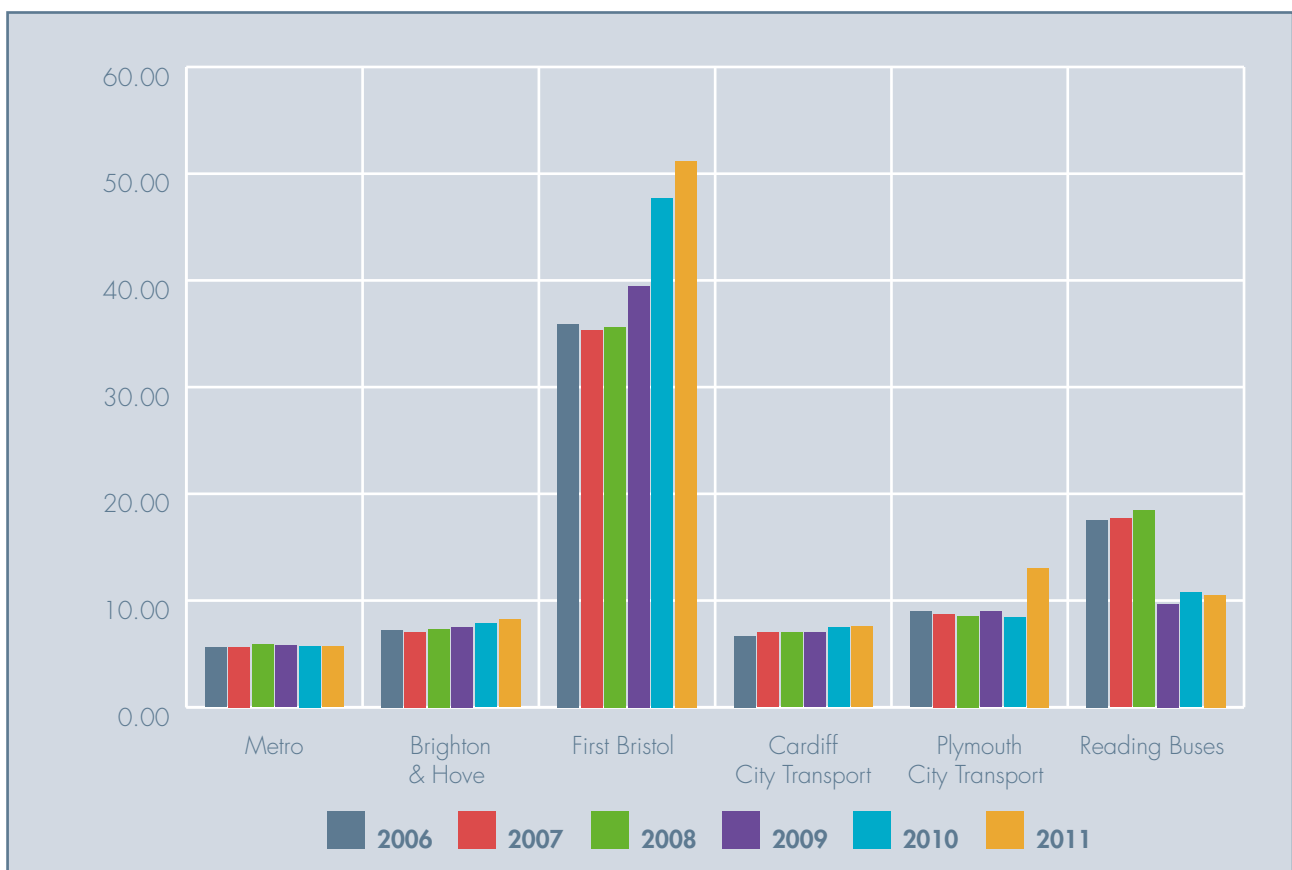
5.4 In 2013, the Department commissioned consultants to update some of this analysis. Previous benchmarking had primarily aimed at measuring the efficiency and effectiveness of Metro and Ulsterbus. This led to definition and estimation of additional performance indicators designed to measure operator effectiveness at a more strategic level. These were:

- operating cost per bus;

- staff per bus;
- turnover per employee;
- wage cost per employee; and
- operating staff to management ratio.

5.5 Examination of these comparators found that Metro and Ulsterbus performed relatively well in terms of operating cost per bus and staff per bus, but lay at the lower end of the range on turnover per employee, wage cost per employee and the operating staff to management staff ratio. The Department told us that it has already taken steps to ensure that Translink examines and addresses some of the poorer performing indicators.

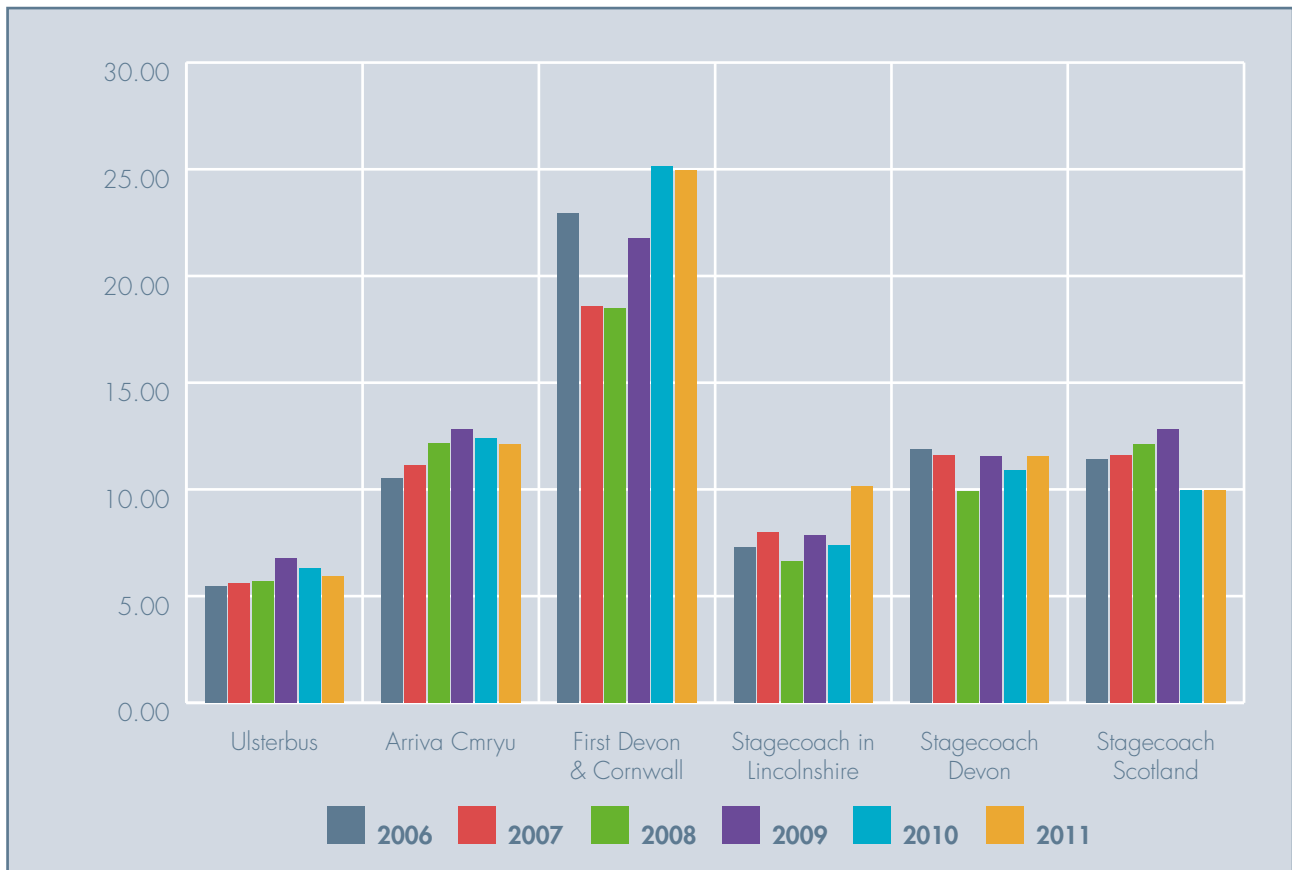
**Figure 16: Benchmarked Metro and Ulsterbus operating staff to management staff ratios**



Source: Translink Benchmarking (TAS Report 2013)



## Part Five: Benchmarking the performance of public transport



Source: Translink Benchmarking (TAS Report 2013)

5.6 Examining the information on operating staff to management staff ratios, **Figure 16** indicates that Metro and Ulsterbus have higher management overheads than other comparator public transport companies. However, in isolation, this data does not allow for an accurate assessment of companies' relative efficiency as we are not in a position to be able to quantify the outputs of each comparator's management/staff functions.

### Recommendation 9

**We recommend that Translink undertakes a more in-depth examination of comparative management/staff ratios which looks at the detail of the tasks performed elsewhere in order to compare the relative effectiveness and quality of the outputs delivered. On the basis of such an analysis it will be in a better position to draw reliable conclusions on whether and to what extent any change is required in their workforce balance.**

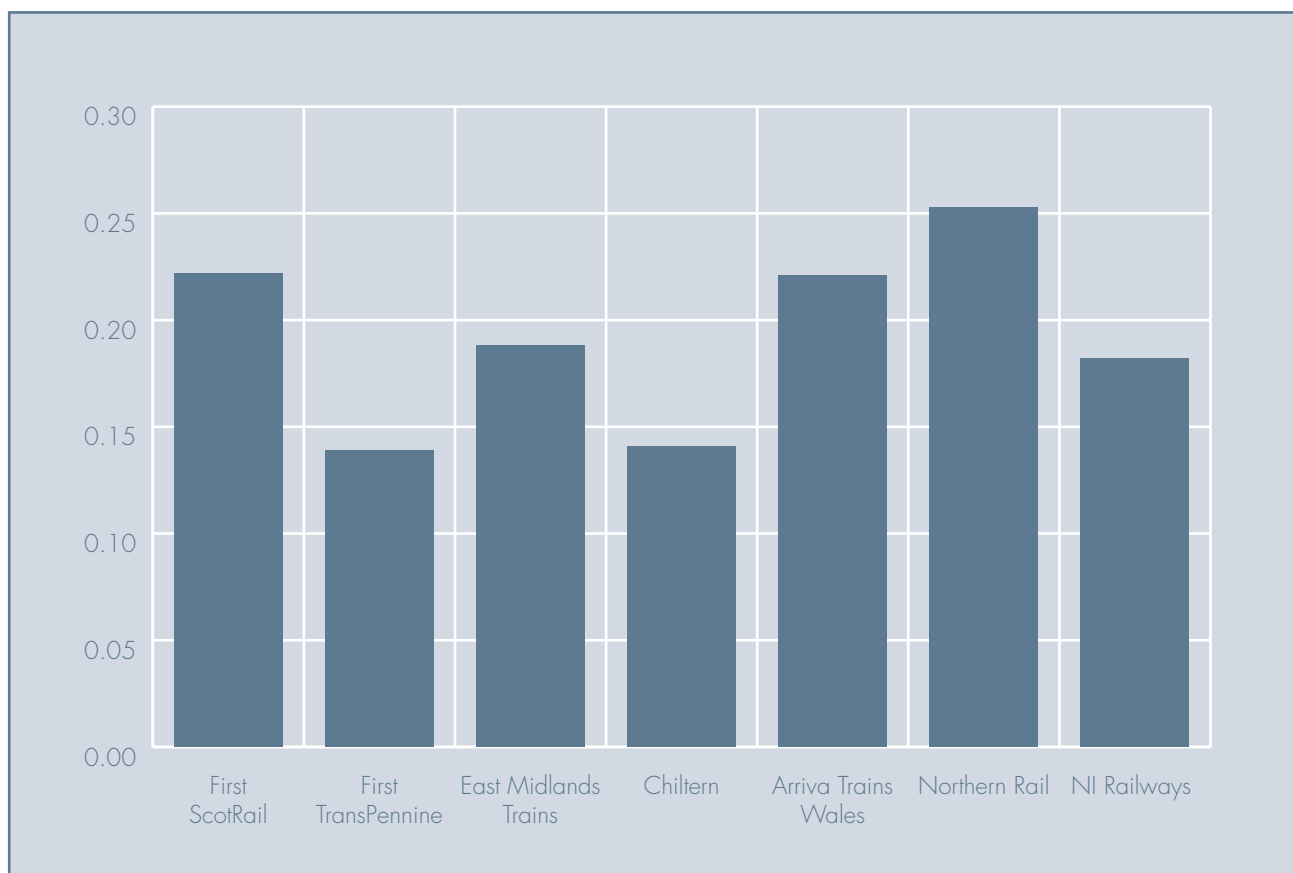
## Our benchmarking of trains showed NIR to be relatively efficient

5.7 The NIAO carried out benchmarking analysis to examine the efficiency of NIR compared to broadly similar train operating companies in Great Britain. This analysis was limited by availability of comparator information and the differing train companies operating models. However, we were able to select six comparator companies based on the characteristics of size, nature and geographic area covered.

5.8 The most up-to-date figures available to us were for 2011-12. We measured the operating cost of the selected train operating companies and compared these to both passenger kilometres travelled and timetabled train kilometres (see **Figures 17 and 18**).

5.9 Under both comparators, NIR is relatively efficient. It has the third lowest cost per passenger kilometre travelled and the second lowest cost per timetabled train kilometre.

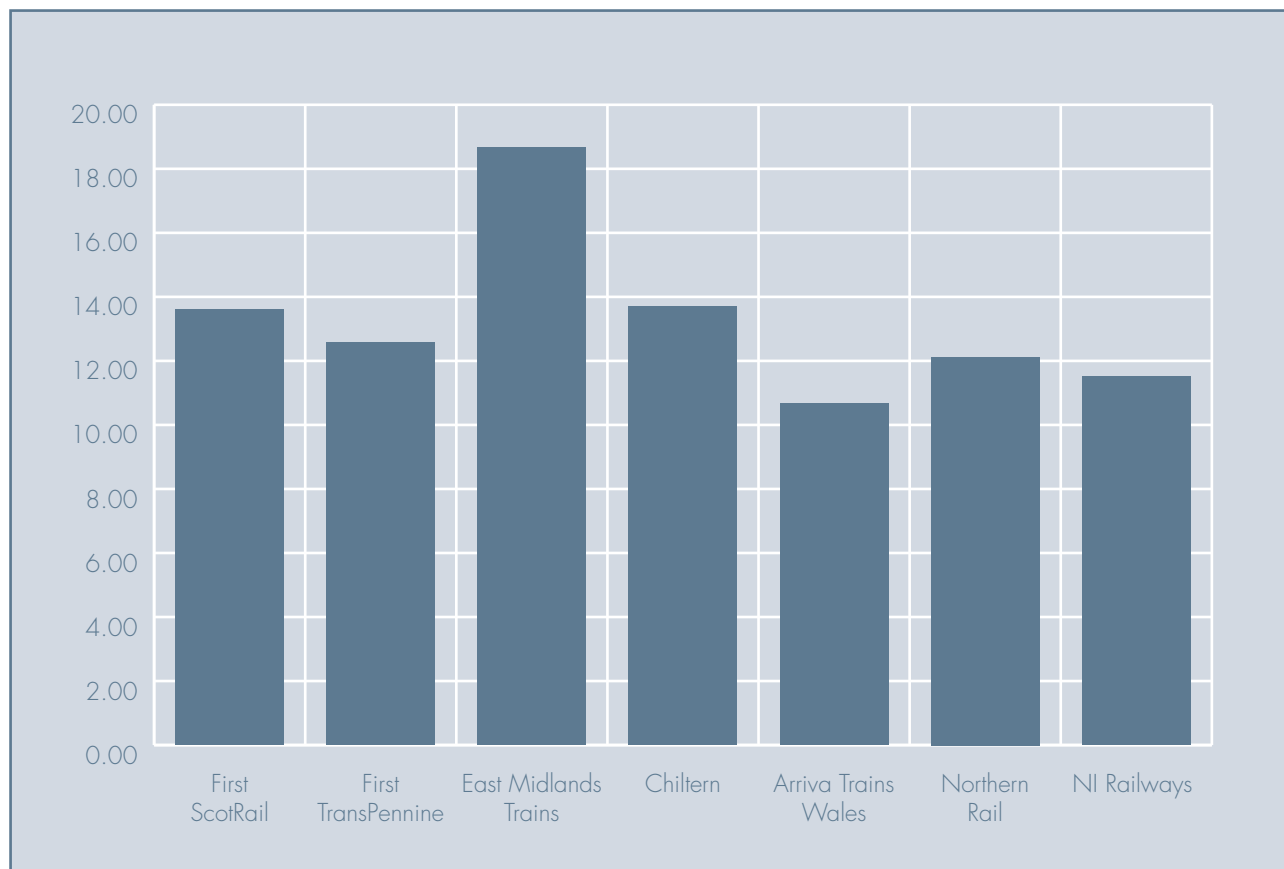
**Figure 17: NIR Operating Cost per passenger km (2011 - 12) £/km**



Source: TAS Rail Industry Monitor and Translink data

## Part Five: Benchmarking the performance of public transport

**Figure 18: NIR Operating Cost per timetabled train (2011 - 12) £/km**



Source: TAS Rail Industry Monitor and Translink data

### Most of our benchmarking work compared outcomes rather than outputs

5.10 The current targets for the DRD and Translink tend to focus on operational measures such as improving bus and train fleet size, age, accessibility, punctuality and reliability and on creating bus ways and rapid transit routes to facilitate public transport. However, in our view as a result of the high level government policy aim of modal shift from private car to public

transport, targets must be focused on outcomes and reflect the factors influencing system performance (**see Recommendation 8**). In our view there is a need to develop targets that reflect those issues that are important to users, including customer services, value for money and passenger information.

5.11 In early 2014, we undertook an extensive benchmarking exercise to develop a suite of additional indicators that focussed on outcomes. The benchmarking comprised two areas of focus:

- enhancing the coverage of performance indicators and review and expand, where practical, the range of comparators; and
- on outcomes, specifically those relating to level and quality of service, mode competitiveness and performance in terms of passengers and market.

5.12 The benchmarking work involved drawing data from a variety of sources: Jane's Urban Transport systems; the annual TAS Partnership Business Monitor; Traveline and Traveline Scotland; the National Transport Authority travel planning tools together with those of National Rail, Irish Rail, Bus Éireann, Dublin Bus, Translink and Great Britain based operators. In addition, road journey times by car have been drawn from a variety of car journey planning tools including that of the Automobile Association.

5.13 In the sections which follow we set out the findings for bus and rail separately. In the case of the former the findings are grouped as follows:

- level of service (vehicle kilometres) by per capita population, by region, population size and population density;
- quality of service by fares and level of comfort;
- passenger satisfaction by operator across a suite of level of service parameters; and

- passengers per capita population, region, population size and population density.

In this area, we were unable to access comparable data to benchmark the performance of Ulsterbus. Many of the bus companies in rural areas of Great Britain are privately owned and do not routinely provide information on many of the above areas.

5.14 In the case of rail, our findings are grouped as follows:

- benchmarked 'walk on' rail fares;
- rail competitiveness for short, medium and longer distance journeys compared to coach/bus and private car in relation to journey times, fares and service frequency;
- passenger satisfaction by operator across a suite of level of service parameters; and
- revenue yields realisable as a function of level of service (in particular, the relative and absolute speed of services).

### **Bus service levels here are comparable to Scotland and Wales but much less than England**

5.15 Vehicle kilometres offers a standardised measure of the level of service provided by individual operators or at an aggregate level by area. The published data indicates overall bus service levels per head of population in Northern

## Part Five: Benchmarking the performance of public transport

Ireland are lower than all other parts of the United Kingdom but markedly lower than Scotland (**Figure 19**). While this allows for population variations, it does not take into account variations in area size and population density. Service levels are likely to be directly related to population density. Overall Northern Ireland's bus service levels per hectare are similar to Scotland, markedly lower than England but on a par with Wales (**Figure 20**).

5.16 **Figure 19** illustrates the bus vehicle kilometres per head of population. Northern Ireland's bus vehicle kilometres per head of population is given a

base value of 100. It is evident that Northern Ireland has the lowest level of bus service provision - Scotland has the highest (194) followed by Wales (110) and England (109).

5.17 **Figure 20** illustrates the bus vehicle kilometres per hectare. Northern Ireland's bus vehicle kilometres per hectare is given a base value of 100. It is evident that England (323) has the significantly highest bus vehicle kilometres per hectare. There is a large drop then to Wales (118) followed by Northern Ireland and Scotland (95).

**Figure 19: Bus Vehicle Kilometres per Head of Population for Northern Ireland, England, Scotland and Wales**

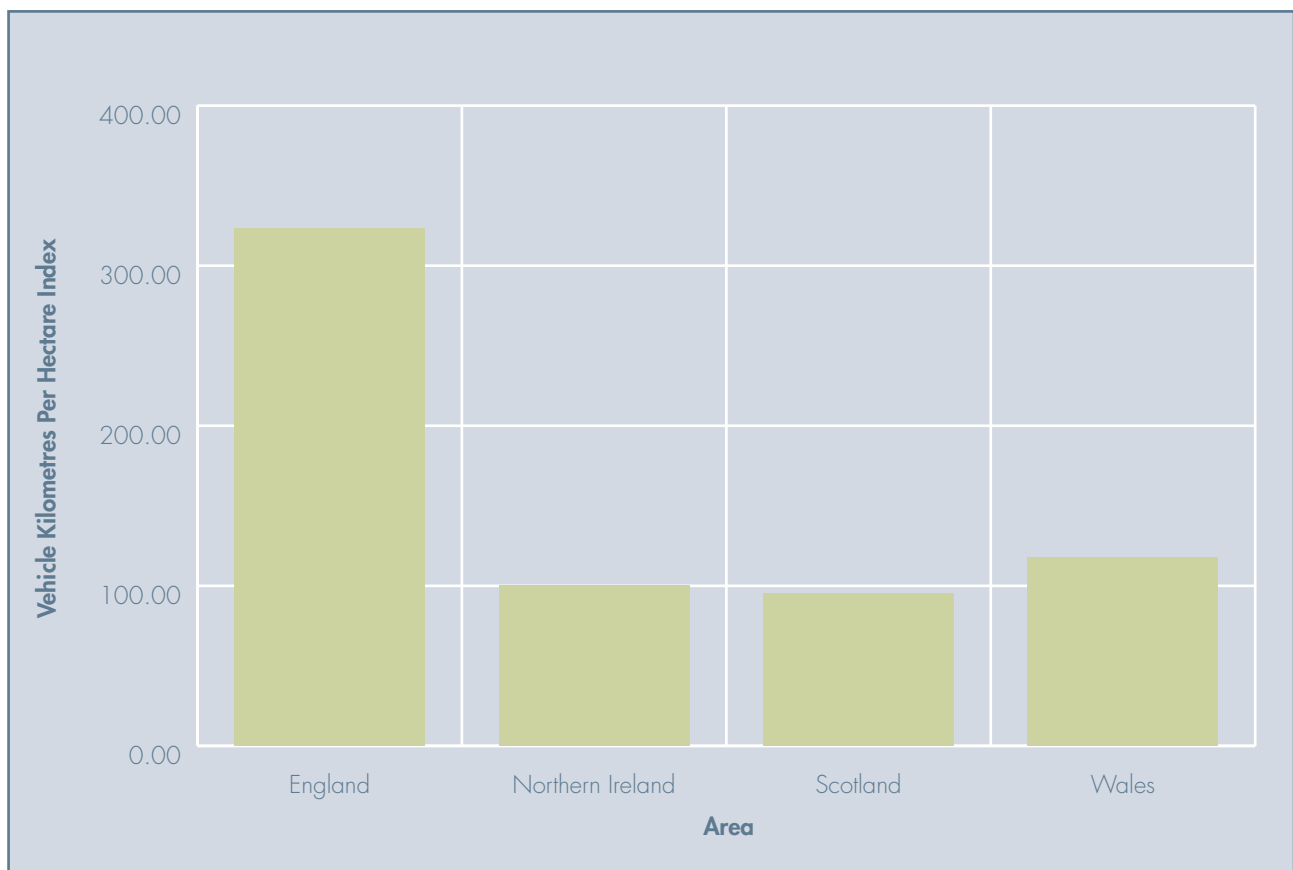


Source: FGS McClure Watters and TAS Partnership Ltd Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.85

5.18 When we consider Belfast separately, bus service levels per head of population are significantly lower than overall average service levels in city regions in Great Britain and London (**Figure 21 overleaf**). This is in line with Table 7.9 of DRD's Review of Outline Business Case for Public Transport Reform (December 2010). Moreover, Belfast's bus service levels per hectare are somewhat lower than overall figures for city regions in Great Britain and barely 20 per cent of that provided in London (**Figure 22 overleaf**). The DRD's Review of Outline Business Case for Public Transport

Reform (December 2010) considered Belfast and the remainder of Northern Ireland at a high level. To provide greater insight and a more robust evidence base on which to compare service level performance we collated additional data for the set of urban areas previously benchmarked by FGS McClure Watters/ TAS Partnership Ltd on behalf of the DRD and interrogated the information at a more detailed level for each urban area separately. The findings from this complementary additional investigation are reported below.

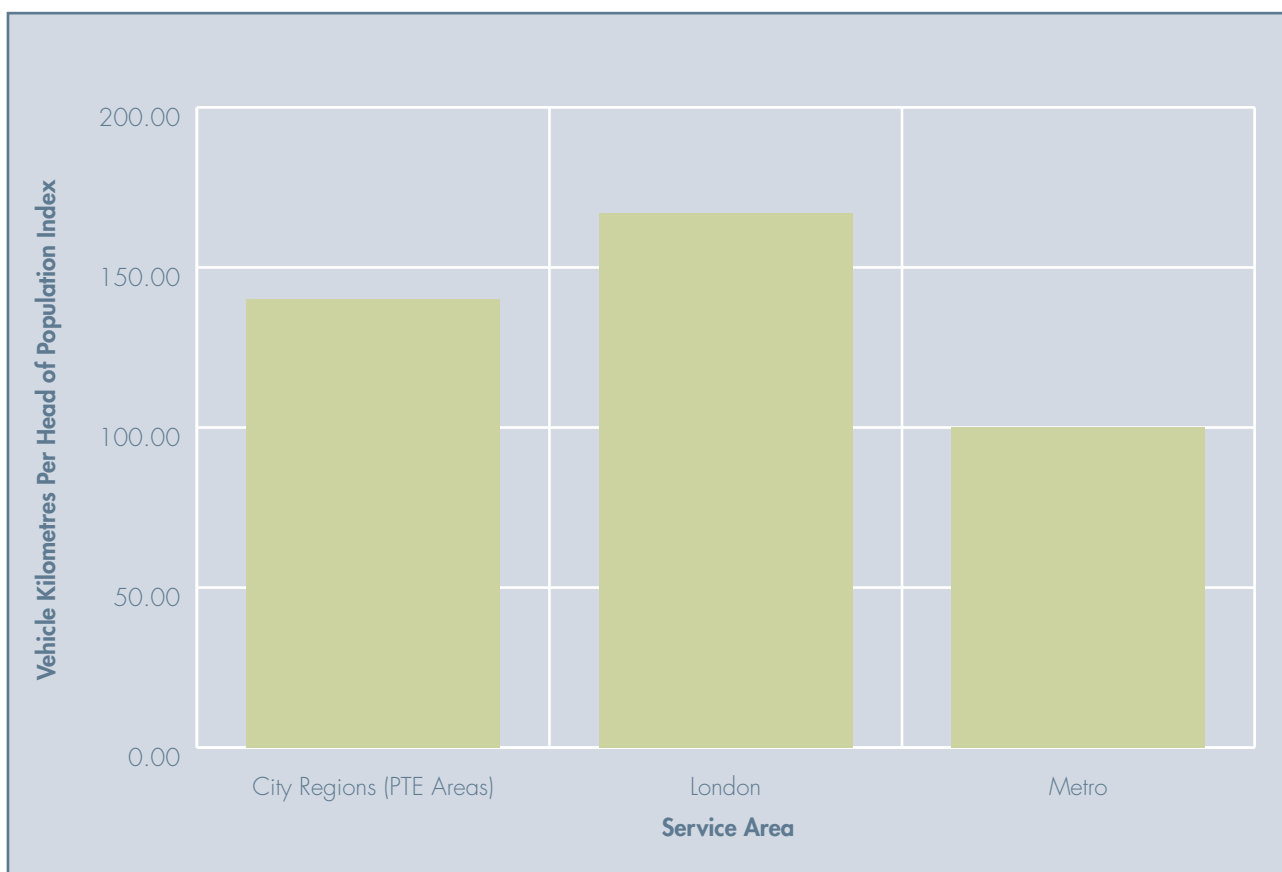
**Figure 20: Bus Vehicle Kilometres per Hectare for Northern Ireland, England, Scotland and Wales**



Source: FGS McClure Watters and TAS Partnership Ltd Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.84

## Part Five: Benchmarking the performance of public transport

**Figure 21: Vehicle Kilometres per Head of Population for Translink Metro (Belfast), City Regions (PTE Areas) and London**



Source: FGS McClure Watters and TAS Partnership Ltd Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.85

5.19 **Figure 21** uses an index scale with Translink Metro's vehicle kilometres per head of population given a base value of 100. It is evident from the figure that Metro has the lowest level of service with London 67 per cent higher and other City Regions (PTE Areas) 40 per cent higher.

### **Metro Bus service levels are less than comparable regions in Great Britain**

5.20 **Figure 22** uses an index scale with Translink Metro's vehicle kilometres per hectare given a base value of 100. Once again, Metro has the lowest level of service. London has vastly greater provision (471) followed by City Regions (PTE Areas) (130). The Department told



**Figure 22: Bus Vehicle Kilometres per Hectare for Translink Metro (Belfast), City Regions (PTE Areas) and London**



Source: FGS McClure Watters and TAS Partnership Ltd Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.84

us that, in relation to Belfast, certain Ulsterbus routes need to be taken into account, as they also serve the population of the Belfast City region, particularly in transporting school pupils.

5.21 Benchmarking against 6 other comparable United Kingdom cities shows that bus service levels per head are lower than most cities with similar populations (see

**Appendix 4**). It also demonstrates that bus service levels per sq km are lower than many cities with similar populations. Bus service levels in Belfast per sq km are typical of urban areas with relatively low population densities. Similarly bus service levels per head of population are typical of urban areas with relatively low population densities.

## Part Five: Benchmarking the performance of public transport

**Figure 23: Bus Vehicle Kilometres per Head of Population for Translink Ulsterbus and Rural Areas elsewhere (Non-PTE)**

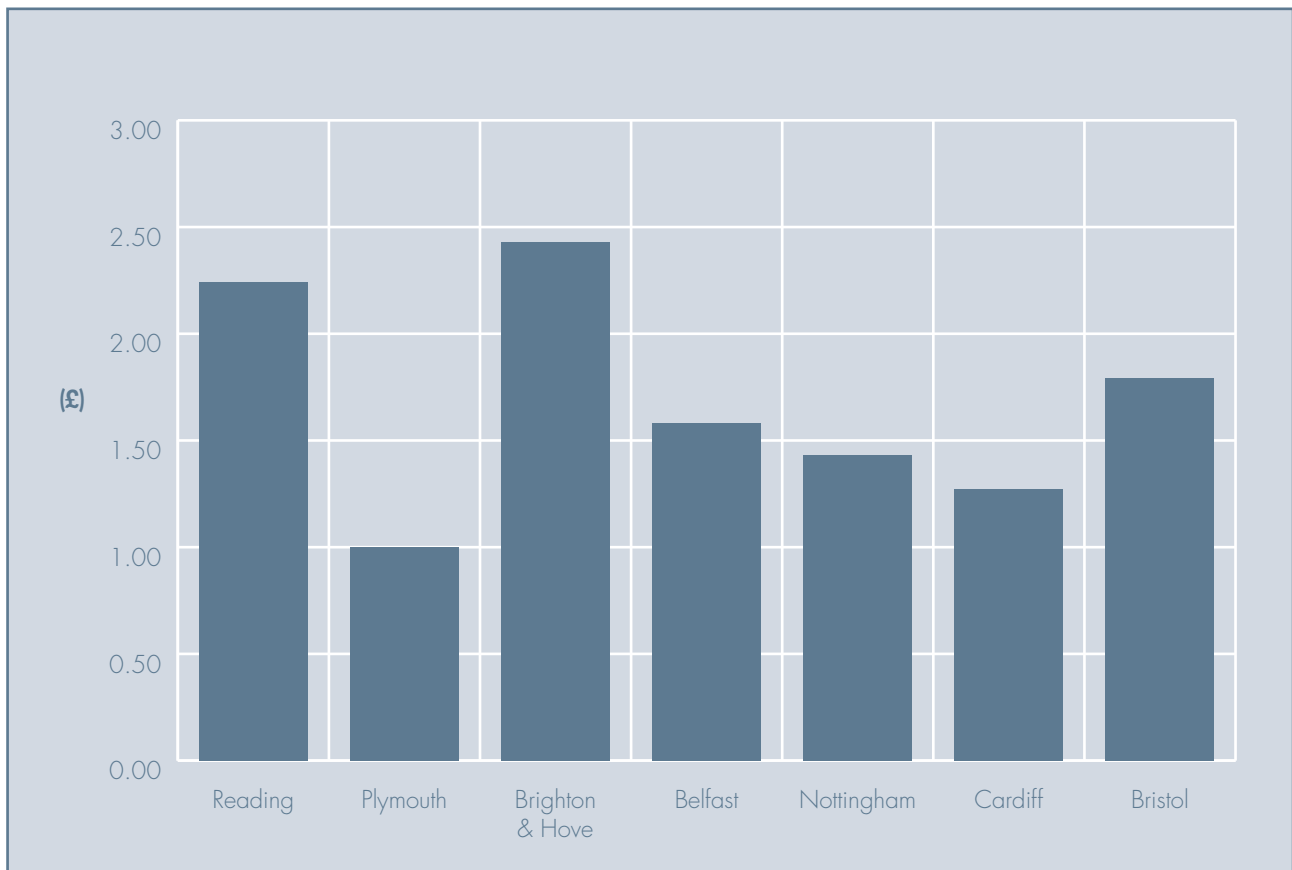


Source: FGS McClure Watters and TAS Partnership Ltd Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.85

### **Ulsterbus service levels are higher than comparable regions in Great Britain**

- 5.22 Overall, NI bus service levels outside Belfast are significantly higher than for areas in Great Britain excluding London and larger city regions (**Figure 23**).
- 5.23 Ulsterbus' vehicle kilometres per head of population are allocated a base

value of 100. It is evident that areas in Northern Ireland (outside Belfast) enjoy a significantly higher level of service per head of population than other Rural Areas (Non-PTE) (86). The DRD informed us that the inclusion of school services within the Ulsterbus vehicle kilometres, differences within Great Britain on the definition of Non-PTE Rural Areas and different arrangements for delivery of

**Figure 24: Average Cost per Passenger Journey in Belfast and 6 United Kingdom Urban Areas**

Source: 2011 Census: Usual resident population, local authorities in England and Wales, Office of National Statistics; NISRA 2011 Northern Ireland Census; Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010; Data from TAS Partnership Ltd

school services outside the mainstream bus network in Great Britain may have contributed to this difference.

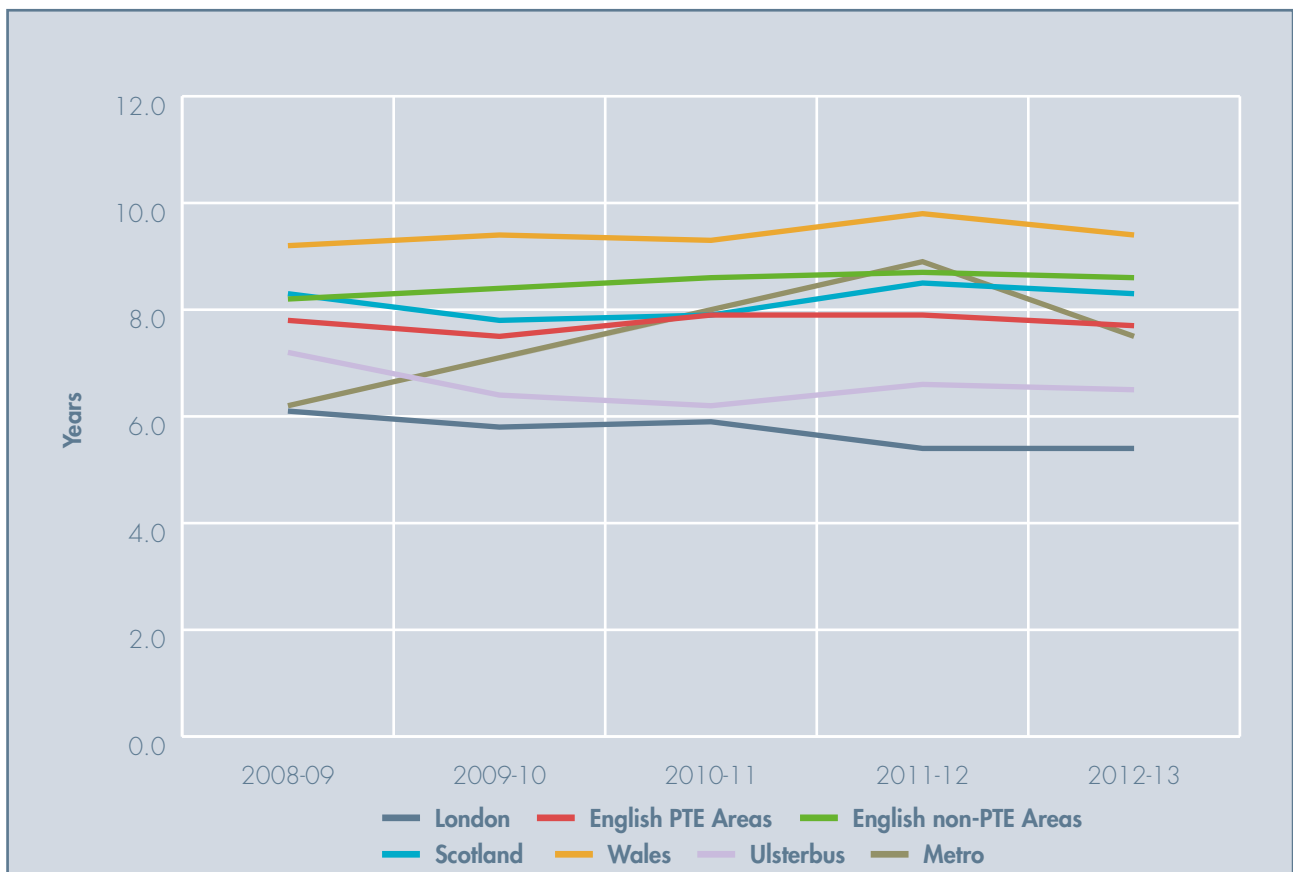
### **Bus Fares are relatively competitive with other cities in Great Britain**

5.24 **Figure 24** compares the average fare per bus journey for Belfast and six other

United Kingdom urban areas. Employing average cost per journey as a surrogate for a representative estimate of fares indicates the lowest average cost per journey is in Plymouth (£1.00) and the highest is in Brighton and Hove (£2.43). The average cost per passenger journey in Belfast is £1.58, the fourth highest of the seven areas and higher than for less prosperous benchmarked urban areas.

## Part Five: Benchmarking the performance of public transport

**Figure 25: Average Age of Bus Fleet for Metro, Ulsterbus and other United Kingdom Regions**



Source: NIAO

### Bus Passengers enjoy relatively high levels of comfort

5.25 Comfort in travelling reflects a combination of a variety of factors including aspects of vehicle design and seating availability. For this exercise two simple indicators of comfort were chosen as indicative of comfort, age of the fleet (**Figure 25**) and load factor (the average number of people on a bus) (**Figure 26**).

5.26 **Figure 25** shows that in 2008 - 09 Ulsterbus and Metro had the youngest average fleet age, with the exception of London. By 2012-13, this was still the case, despite a rise in Metro's average fleet age.

5.27 Turning to load factors, buses in Northern Ireland operate with lower load factors than any other area of

**Figure 26: Bus Passenger Journeys per Vehicle Kilometre for Translink Metro (Belfast), City Regions (PTE Areas) and London**



Source: FGS McClure Watters and TAS Partnership Ltd in Department for Regional Development, *Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.82*

the United Kingdom. For Belfast, bus services operate with marginally lower load factors than other city regions in the United Kingdom but markedly lower than in London as illustrated by **Figure 26**.

5.28 **Figure 26** illustrates the bus passenger journeys per vehicle kilometre for Metro, City Regions (PTE Areas) and London. The Figure uses an index scale with Translink Metro's passenger journeys

per vehicle kilometre given a base value of 100. Metro has the lowest bus passenger journeys per vehicle kilometre, slightly less than City Regions (PTE Areas) (106) and significantly less than London (206).

5.29 Together these indicators suggest Translink bus passengers enjoy relatively good levels of comfort.

## Part Five:

### Benchmarking the performance of public transport

#### Buses – Passenger satisfaction over a suite of level of service parameters

5.30 An important element of benchmarking public transport is how the consumer views the service on offer. Translink undertakes surveys of customer satisfaction as part of its monitoring programme in fulfilment of its commitment to its service monitoring programme. Similarly Passenger Focus coordinates/undertakes user satisfaction surveys periodically among bus users in Great Britain. As part of this review we have collated the findings of both sources of information for a number of benchmarked urban areas. Detailed findings are presented for a series of key quality of service parameters at **Appendix 5**. Below, this work is summarised in **Figure 27**. The graphs at Appendix 5 were created using the results of passenger satisfaction surveys undertaken for both Passenger Focus and Translink. The Passenger Focus surveys asked passengers to rank different aspects of the service using a 5 point scale (1. Very Dissatisfied, 2. Fairly Dissatisfied, 3. Neither, 4. Fairly Satisfied, 5. Very Satisfied). Translink's Independent Monitoring Update presents passenger satisfaction levels as a Customer Performance Index (CPI). Unfortunately there is no information on how the CPI is calculated. However, up until 2013 the Independent Monitoring Update also presented a breakdown of customer satisfaction levels (as a percentage) using a 5 point scale similar to that used by Passenger Focus (1. Very Bad, 2. Quite Bad, 3. Neither, 4. Quite Good, 5. Very Good). The satisfaction

levels presented at Appendix 5, and summarised below, are a combination of the percentage of customers "Fairly Satisfied" and "Very Satisfied" for Passenger Focus surveyed areas, and, the percentage of customers who assessed Translink as "Quite Good" and "Very Good".

5.31 We acknowledge that the results quoted are based on a sample of customers, so that for percentages quoted, a small difference in percentage values may not be a genuine difference. However, we are of the view, that it is beneficial to compare with other operators at a high level to review performance.

**Figure 27: Metro Bus Customer Satisfaction Levels ranked with 6 United Kingdom urban bus systems**

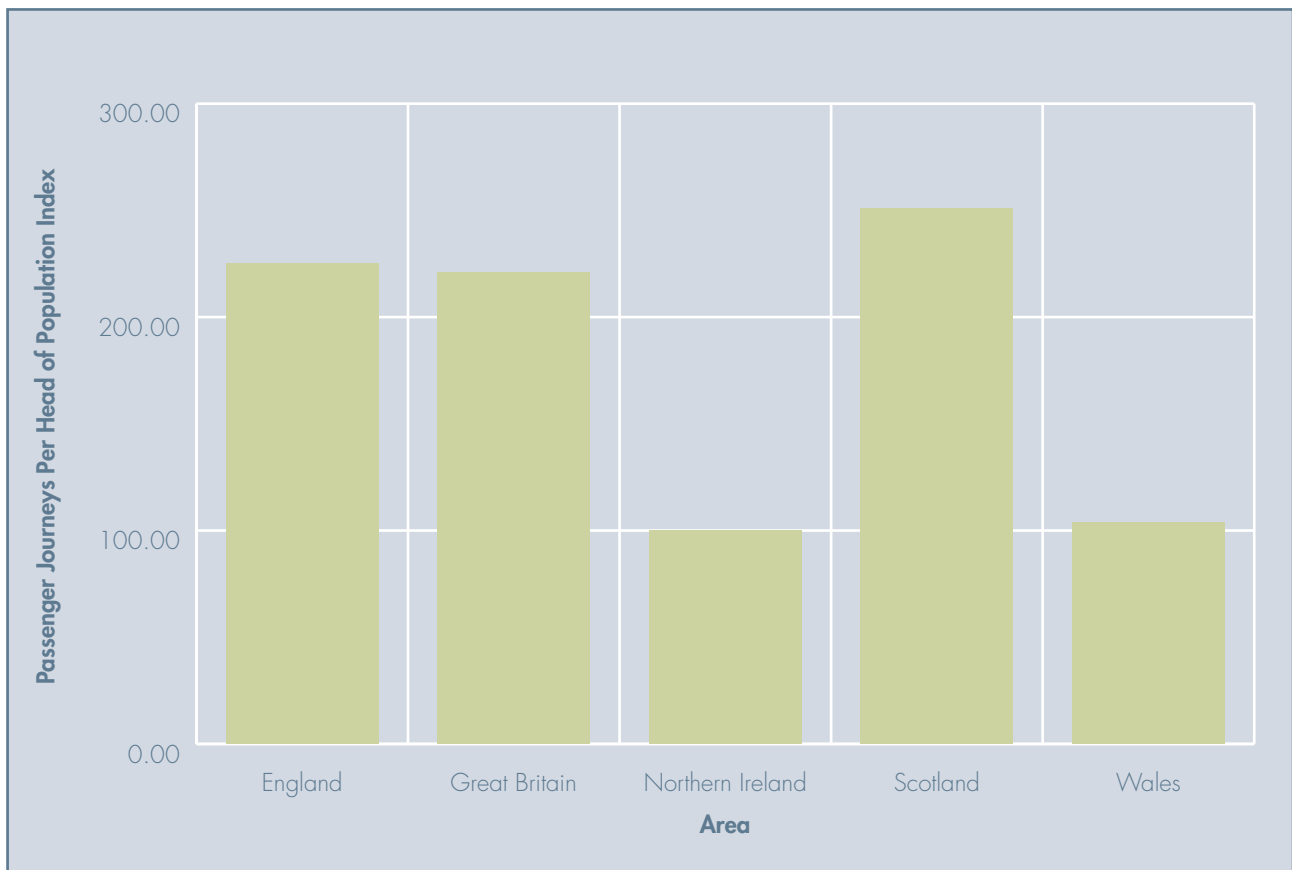
Quality of service parameter	Metro Ranking <sup>24</sup>
Punctuality	5 <sup>th</sup>
Cleanliness	7 <sup>th</sup>
Comfort	1 <sup>st</sup>
Seating availability	Joint 5 <sup>th</sup>
Information provision	5 <sup>th</sup>
Driver helpfulness	6 <sup>th</sup>
Value for money	4 <sup>th</sup>

Sources: Passenger Focus: Bus Passenger Satisfaction Survey Results (latest available figures for each Company at time of writing); Cardiff City Council; Translink Independent Monitoring Update 2nd Update Issue 2013

5.32 This comparison indicates that, in general terms, Metro customers were less satisfied than customers in other parts of Great Britain. Metro compared poorly in the areas of punctuality,

24 The 6 other bus companies were based in Brighton, Bristol, Cardiff, Nottingham, Plymouth and Reading

**Figure 28: Passenger Journeys per Head of Population at a coarse geographical scale: namely for Northern Ireland, England, Scotland, Wales and Great Britain**



Source: FGS McClure Watters and TAS Partnership Ltd in Department for Regional Development, *Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.81*

cleanliness, seating availability, information provision and driver helpfulness. They were average in terms of value for money, but had the highest satisfaction levels in terms of comfort (in line with our analysis at paragraphs 5.25 – 5.29).

#### **Recommendation 10**

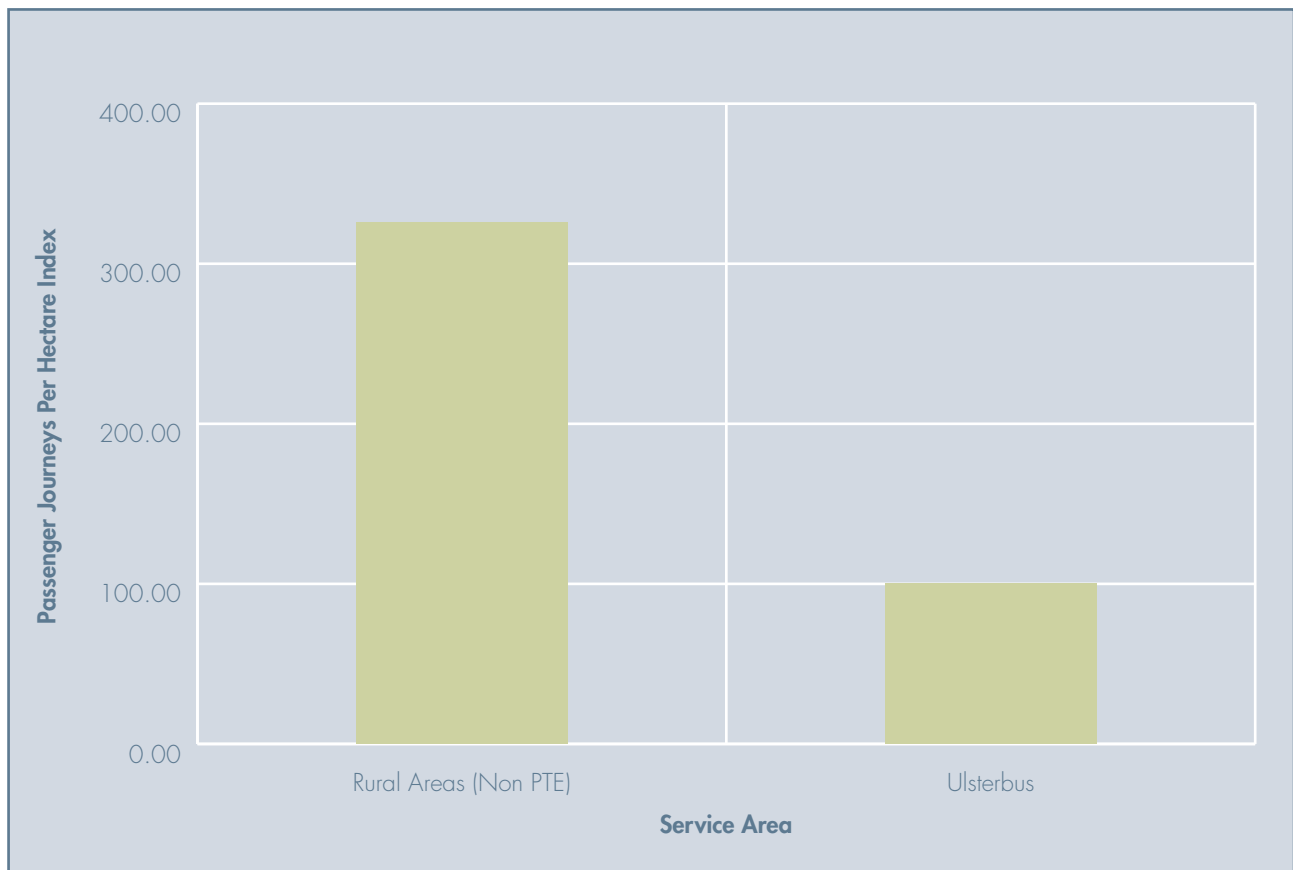
**Translink should regularly benchmark its customer satisfaction surveys with other bus operators to assess the relative strengths and weaknesses of its transport offer. Remedial action should be initiated where performance is relatively poor.**

#### **There are relatively few bus passengers compared to other parts of the United Kingdom**

5.33 **Figure 28** shows passenger journeys per head of population per country. The Figure uses an index scale with Northern Ireland's bus passenger journeys per head of population given a base value of 100. Northern Ireland has the lowest bus passenger journeys per head of population, closely followed by Wales (104). Scotland has the highest (251) followed by England (225). The overall index value for Great Britain is 221.

## Part Five: Benchmarking the performance of public transport

**Figure 29: Bus Passenger Journeys per Hectare for Translink Ulsterbus and Rural Areas (Non-PTE)**



Source: FGS McClure Watters and TAS Partnership Ltd in Department for Regional Development, *Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.79*

5.34 **Figure 29** illustrates the bus passenger journeys per hectare for Ulsterbus and Rural Areas (Non-PTE). The graph uses an index scale with Ulsterbus' passenger journeys per hectare given a base value of 100. Ridership in Northern Ireland is typically little more than a third of other similar areas in the United Kingdom.

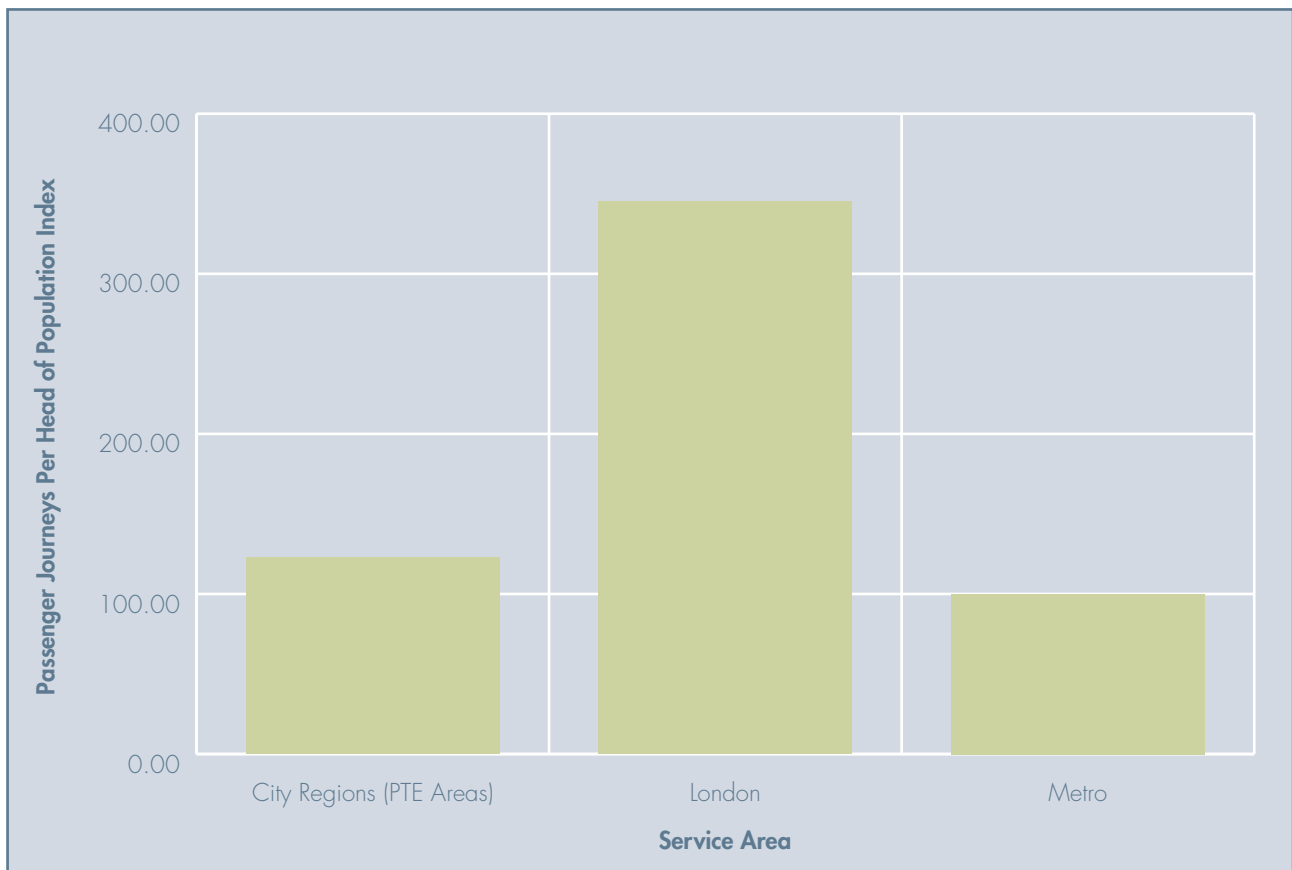
5.35 Turning to experience with urban areas **Figure 30** illustrates bus passenger journeys per head of population for Metro (Belfast), City Regions (PTE Areas)

and London. Once again this figure employs an index scale with Translink Metro's passenger journeys per head of population given a base value of 100. Metro has the lowest bus passenger journeys per head of population, slightly less than City Regions (PTE Areas) (123) and significantly less than London (345).

5.36 **Appendix 6** contains a number of charts which compare passenger journeys per head of population, per square kilometre



**Figure 30: Bus Passenger Journeys per Head of Population for Translink Metro (Belfast), City Regions (PTE Areas) and London**



Source: FGS McClure Watters and TAS Partnership Ltd in Department for Regional Development, *Review of Outline Business Case for Public Transport Reform, Final Report – December 2010 - Chapter 7 p.81*

and population density in Belfast with a number of similar United Kingdom and European cities. These show that bus passenger journeys are low by all these categories. The Department told us that, although bus passenger journeys per capita, between 2000 - 01 and 2013 -14, have decreased by 7.5 per cent in Northern Ireland, equivalent figures for Wales, Scotland and England (outside London) show decreases of 14.6 per cent, 11.1 per cent and 13.6 per cent respectively.

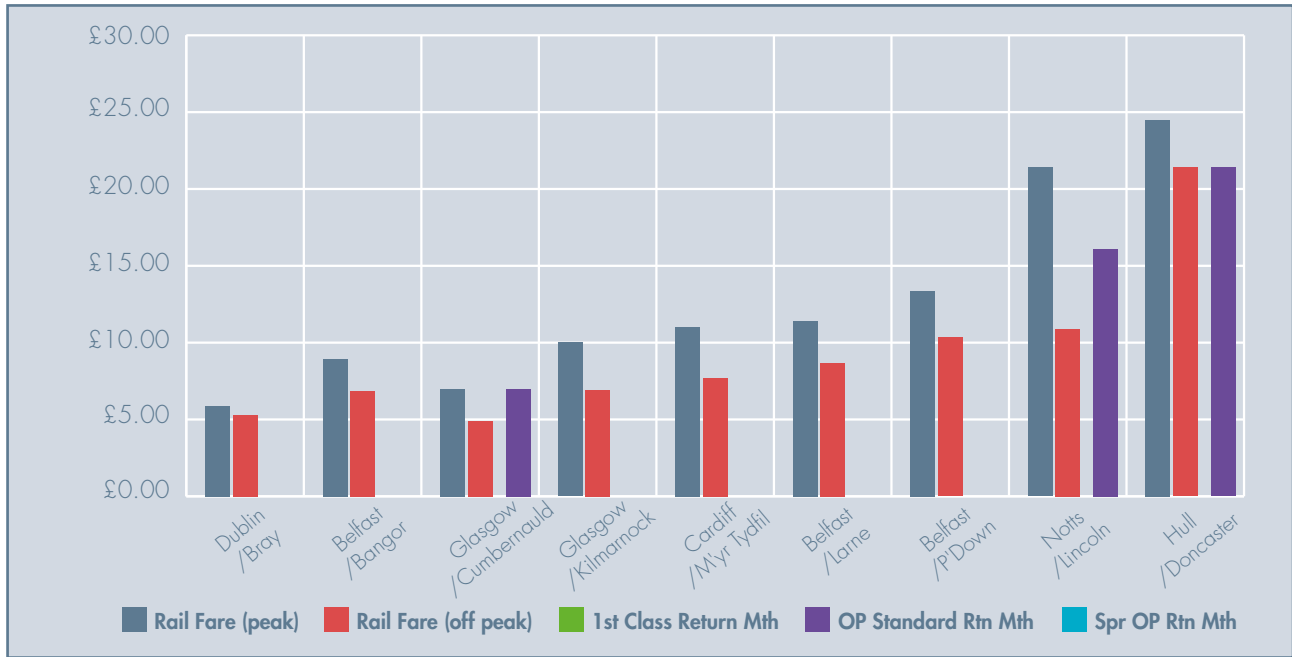
### **Rail Fares are generally cheaper than in other parts of the United Kingdom**

5.37 This section examines the 'walk on'<sup>25</sup> rail fares for NIR on a number of routes in comparison with journeys on selected Train Operating Company routes in Great Britain. To facilitate comparison, a sample of journeys has been chosen which are representative of different journey types i.e. 0-50 miles, 51-100 miles and above 100 miles.

25 'Walk on' rail fares are those fares payable on the day, rather than purchasing ticket in advance, over the web, or through some discounted scheme

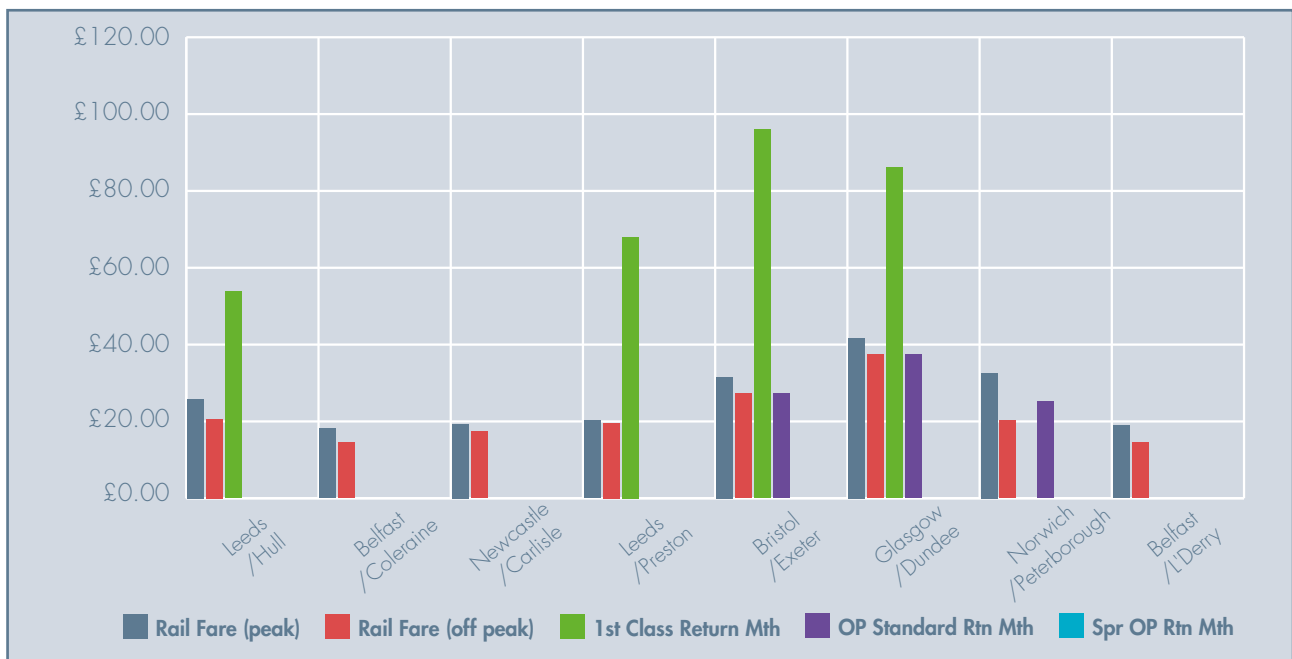
## Part Five: Benchmarking the performance of public transport

**Figure 31: Walk-On Rail Fares by Distance Band (0-50 miles)**

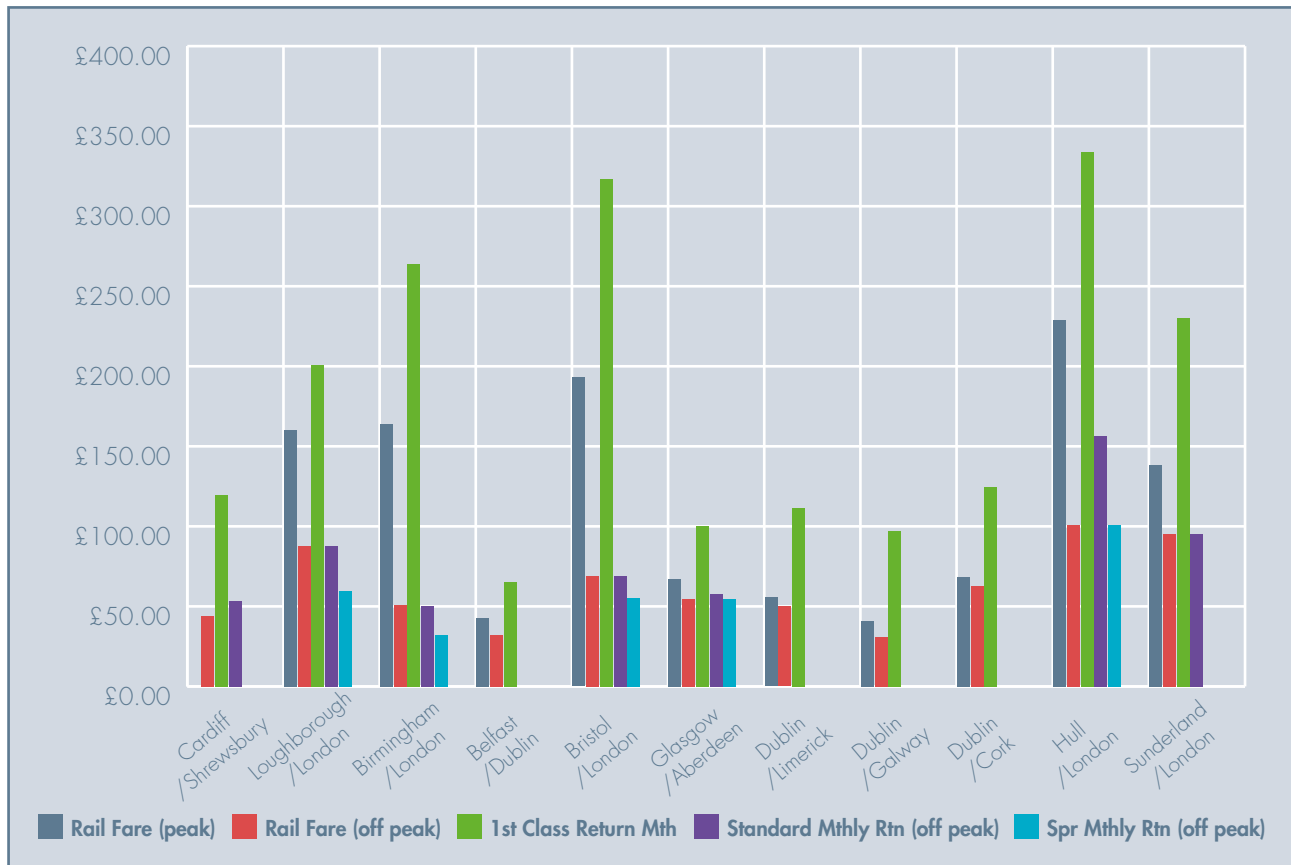


Source: National Rail, Translink, Irish Rail and Rail Operator Journey Planners in Great Britain

**Figure 32: Walk-On Rail Fares by Distance Band (51-100 miles)**



Source: National Rail, Translink, Irish Rail and Rail Operator Journey Planners in Great Britain

**Figure 33: Walk-On Rail Fares by Distance Band (>100 miles)**

Source: National Rail, Translink, Irish Rail and Rail Operator Journey Planners in Great Britain

- 5.38 The results tend to show that for shorter distance journeys rail fares in Northern Ireland are in line or slightly higher than local fares in Scotland and the Republic of Ireland but lower than elsewhere in Great Britain (**Figure 31**).
- 5.39 For all journeys above 50 miles, NIR fares are typically cheaper and in the case of longer distances, markedly lower than fares in the same distance band in Great Britain (**Figures 32 and 33**).

### Rail journeys remain relatively slow

- 5.40 Rail fares represent one element of level of service. In the absence of readily available information on market share by route, a combination of level of service indicators for short, medium and longer distance journeys on the NIR network was compared to journeys of similar length on Irish Rail and on services operated by selected Train Operating Companies in Great Britain. These indicators encompassed journey times

## Part Five: Benchmarking the performance of public transport

and frequencies, in addition to 'walk on' fares for rail bus/coach and car.

- 5.41 The findings are presented in a series of bar charts that show rail journey times against fares and frequency of service compared to fares for the sample of journeys in each of the distance bands (0-50 miles, 51-100 miles and above 100 miles). These findings are presented at **Appendix 7**.
- 5.42 The results illustrate that NIR is competitive with road journeys on selected routes for shorter commuting journeys into Belfast but less competitive for longer journeys. This is particularly true for Belfast - Londonderry and Belfast - Dublin where, in the case of the former, not only is the car more attractive, but also the coach, both in terms of journey time and service frequency. In the case of the Belfast - Londonderry journey, the routing of rail via Coleraine helps to explain the lack of competitiveness in time and frequency terms.
- 5.43 In the Belfast – Dublin journey, the recent improvements to the road network mean that only in the peak for centre to centre times does rail retain any degree of competitive advantage compared to the car. In the case of coach, there is no precedent on the island of Ireland or indeed in Great Britain for the level of competition from this mode of transport, both in frequency and journey time.
- 5.44 Typically for longer distance journeys, NIR offers lower speeds, markedly lower in some cases, than for most other

routes surveyed in Great Britain and the Dublin - Cork route, but similar to other routes on Irish Rail. In contrast to service speeds, 'walk on' fares are typically lower for longer distance journeys on NIR than elsewhere and in line or lower for short distance journeys as referred to above.

### **If rail journeys were faster, more fare revenue may be generated**

- 5.45 Comparing rail revenue yield to distances covered and speed competitiveness to the car reveals NIR fares being constrained by comparatively low journey speeds for medium (51-100 miles) and long distances (>100 miles). For shorter distances (under 50 miles) the pattern is more mixed. The analysis also indicates that revenue yield for NIR is significantly constrained by the lack of competitiveness in terms of absolute journey speed and particularly in relation to car and coach speed over longer distances. **Appendix 8** provides more detail on these findings.

#### **Recommendation 11**

**NIR revenues could be significantly enhanced if journey times were improved to increase competitiveness with the car and coach. The DRD, in conjunction with Translink, should investigate investment in backlog track maintenance and track renewal to improve line speeds. This would make rail travel more competitive, increase revenues and reduce the public funding requirement.**

## Rail – Passenger satisfaction over a suite of level of service parameters

5.46 As noted at paragraph 5.30, an important element of benchmarking public transport is how the consumer views the service on offer. Translink undertakes surveys of customer satisfaction as part of its monitoring programme in fulfilment of its commitment to its service monitoring programme. Similarly Passenger Focus coordinates/undertakes user satisfaction surveys periodically among rail users in Great Britain. As part of this review we have collated the findings of both sources of information for a number of benchmarked rail operators. Details of the methodology applied are given at paragraph 5.30. Detailed findings are presented for a series of key quality of service parameters at **Appendix 9**. Below, this work is summarised in **Figure 34**.

5.47 We acknowledge that the results quoted are based on a sample of customers, so that for percentages quoted, a small difference in percentage values may not be a genuine difference. However, we are of the view, that it is beneficial to compare with other operators at a high level to review performance.

**Figure 34: NIR Rail Customer Satisfaction Levels ranked with 8 other United Kingdom rail services**

Quality of service parameter	NIR Ranking <sup>26</sup>
Punctuality	2 <sup>nd</sup>
Cleanliness	2 <sup>nd</sup>
Comfort	1 <sup>st</sup>
Seating availability	3 <sup>rd</sup>
Information provision	1 <sup>st</sup>
Staff helpfulness	1 <sup>st</sup>
Value for money	2 <sup>nd</sup>

Sources: *Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 2nd Issue 2013*

5.48 This comparison indicates that, in general terms, NIR customers' satisfaction ratings compared very favourably to other customers' satisfaction ratings of their local rail companies. NIR was best for information provided, comfort and staff helpfulness. It was also ranked second best for value for money, cleanliness and punctuality. It was ranked as third best company for availability of seating.

### Recommendation 12

**Translink should analyse the relatively good customer satisfaction ratings achieved by NIR. Methods used to achieve such positive ratings should be disseminated to Ulsterbus and Metro.**

26 The 8 other rail companies were Arriva Wales, Chiltern, East Midlands, First Hull, First TransPennine, Grand Central, Northern Rail and ScotRail





## Appendix 1: Summary of RTS Funding Requirement (2002 to 2012) (paragraph 2.2)

Transport Mode/Initiative Detail	£m	£m	£m
<b>Rail</b>			
Public service obligation	140.0		
Concessionary fares	18.5		
Infrastructure maintenance	27.7		
Rolling stock maintenance	38.6		
Other NITHC costs	4.0		
Railways Task Force Consolidation	129.0		
Halt in/near Templepatrick	0.6		
Replacement of Castle Class rolling stock	11.4		
Retain existing rail network; provide new trains	85.8		
Enhance rail capacity	24.4		
Additional Enterprise services	5.0		
Access improvements at/to rail stations	9.4		
Promoting sustainable modes	0.9		
Refurbishment of rail stations	6.3	<b>501.6*</b>	
<b>Bus</b>			
Enhanced facilities for buses	5.3		
Fuel Duty Rebate	70.0		
Concessionary fares	145.5		
Other NITHC costs	16.0		
Bus replacement programme	145.5		
Public transport information	10.0		

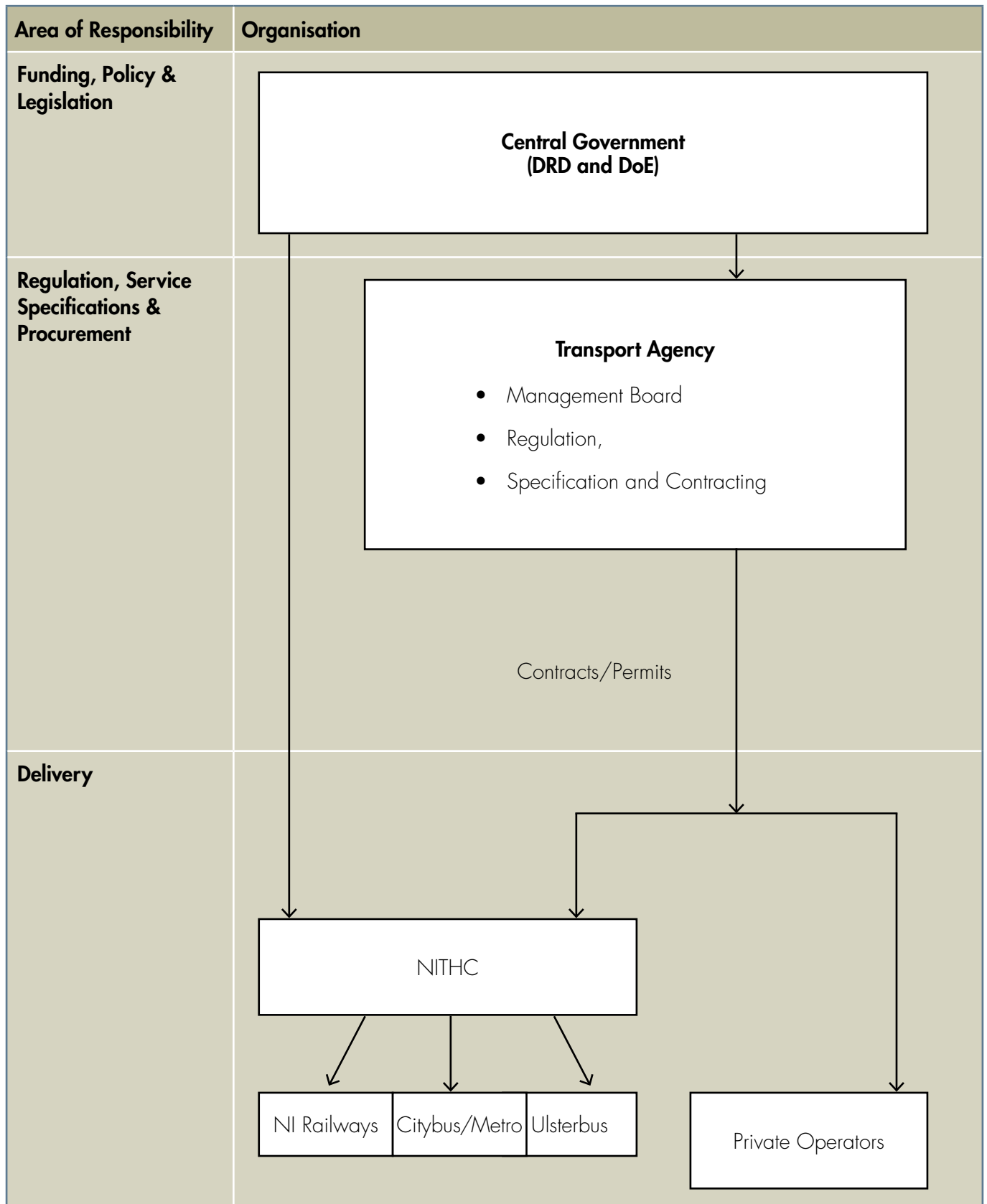


<b>Transport Mode/Initiative Detail (Cont'd)</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>
Quality Bus Corridors (phase 1)	43.3		
Quality Bus Corridors (phase 2)	20.0		
Bus based Park and Ride (phase 1)	22.7		
Bus based Park and Ride (phase 2)	12.0		
Transport Programme for People with Disabilities	12.0		
Promoting sustainable modes	1.3		
Refurbishment of Ulsterbus stations	9.1		
Bus stop and access facilities on Quality Bus Corridors	13.5		
Bus priority	1.6		
Goldline frequency increases	10.0		
Access improvements at Ulsterbus stations	3.4		
Additional bus services within towns	30.4		
Rural Transport Fund	18.0		
Demand responsive transport services	31.5		
New 'small' vehicle fixed route public transport services	4.7	<b>625.8*</b>	
<b>Rapid Transit</b>			
Commencement of Rapid Transit Network	100.0	<b>100.0*</b>	
<b>Public Transport</b>			<b>1,227.4*</b>
Highways			<b>2,176.1*</b>
Walk/Cycle			<b>86.5*</b>
All (Research, monitoring and review)			<b>10.0*</b>
<b>Total</b>			<b>3,500</b>

Source: RTS

\*Note: As research etc. relates to all modes, the total costs above do not match those in Figure 1

## Appendix 2: Proposed Three-tier Public Transport Delivery Structure (paragraph 3.5)



## Functions

- Funding
  - Legislation
  - Public transport policy
  - Strategic planning of public transport
  - Commercial performance of NITHC/Translink
  - Operator/vehicle licensing (DoE)
- 
- Operational policy and co-ordination of regional and local planning
  - Manage public transport budget
  - Specify public transport service requirements
  - Procure public transport services
  - Award and manage contracts
  - Control and report on performance of service delivery and transport plans
  - Carry out research
  - Fund concessionary fares and fuel duty rebate schemes
  - Community and rural transport
  - Award and regulate innovative service permits
  - Market/promote public transport
  - Regulate fare structures/levels
  - Specify requirements for integrated ticketing
  - Statutory consultee for land use planning
  - Secure and manage developer contributions
- 
- Devise service/network plans and timetables
  - Schedule and run bus and rail services, inc. contracted school transport
  - Sell tickets/passes and handle reservations
  - Manage/maintain trains, buses, track, signals and public rights of way
  - Specify and procure fleet
  - Manage and upgrade shared passenger facilities
  - Provide customer information for all services
  - Manage depots, engineering facilities and portfolio of operator-owned properties
  - Manage and control health and safety
  - Promote/market specific public transport services
  - Deal with customers-information, complaints etc.
  - Monitor contractual performance of public transport services inc. external suppliers
  - Account for costs and revenues and report performance
  - Operate byelaws, fines and penalties

## Appendix 3: The Performance of Public Transport in Northern Ireland (2002 to 2014) (paragraph 4.15)

### Performance v Regional Transport Strategy (RTS) public transport related targets

RTS Target	Position at 31 March 2014	Status
<b>Translink – Metro Buses</b>		
Average Metro vehicle age of no more than 8 years.	The average age of the Metro fleet was 8.18 years. 54 buses are due for delivery during 2014 - 15, which will reduce average age of fleet to 6.17 years.	<b>On Target for Achievement</b>
No Metro vehicle older than 18 years.	No Metro fleet buses are over the age of 18.	<b>Target achieved</b>
100% of Metro buses accessible – per Public Service Vehicles Accessibility Regulations (NI) 2003.	Metro fleet 100% accessibility compliant.	<b>Target achieved</b>
14 Quality Bus Corridors (QBCs) operating on main radial routes in Belfast, as specified in the Belfast Metropolitan Transport Plan.	<p>8 out of 14 routes launched as QBCs –</p> <ul style="list-style-type: none"> <li>• Saintfield Road;</li> <li>• Newtownards Road;</li> <li>• Falls Road;</li> <li>• M2 City Express;</li> <li>• Antrim Road;</li> <li>• Lisburn Road;</li> <li>• Shore Road; and</li> <li>• Shankill Road.</li> </ul> <p>The 6 remaining routes are operating as QBCs but have not been officially launched –</p> <ul style="list-style-type: none"> <li>• Holywood Road;</li> <li>• Castlereagh Road;</li> <li>• Cregagh Road;</li> <li>• Malone Road;</li> <li>• Springfield Road; and</li> <li>• Crumlin Road.</li> </ul> <p>Each of the unlaunched routes feature increased bus frequency and improved measures such as bus lanes and priority junctions. However, the incremental nature of these improvements over several years has made it unlikely that an official launch of the schemes will take place under the QBC banner.</p> <p>The Newtownards Road and West Belfast (Divis/Falls/Andersonstown Road) QBCs are due to be remodelled as Rapid Transit Routes by 2017, and mark the next stage of public transport improvements in Belfast.</p>	<b>Target achieved</b>

RTS Target	Position at 31 March 2014	Status
<p><b>Metro compliance with current Translink Passenger Charter</b></p> <p><b>Reliability – Metro</b></p> <ul style="list-style-type: none"> <li>• 99.2% of all buses will run as planned.</li> </ul>	<p>100% of Metro services ran as planned in 2013.</p>	<p><b>Target achieved</b></p>
<p><b>Punctuality – Metro</b></p> <ul style="list-style-type: none"> <li>• 95% of all buses will arrive no more than seven minutes late.</li> </ul>	<p>88.5% of Metro services arrived no more than 7 minutes late in 2013.</p> <p>Poor punctuality on services during Autumn 2013 was due to increased traffic congestion caused primarily by road works. Translink subsequently carried out adjustments to driver schedules to remedy this slippage.</p>	<p><b>On Target for Achievement</b></p>
<b>Translink - Ulsterbus</b>		
<p>Average Ulsterbus vehicle age of no more than 8 years.</p>	<p>Average age of the Ulsterbus fleet was 6.77 years.</p>	<p><b>Target achieved</b></p>
<p>No Ulsterbus older than 18 years.</p>	<p>No buses older than 18 years.</p>	<p><b>Target achieved</b></p>
<p>No Ulsterbus Goldline coach older than 12 years by 2012.</p>	<p>No Goldline coaches were over the age limit of 12 years.</p>	<p><b>Target achieved</b></p>
<p>100% of buses (including Goldline coaches) accessible – meeting the requirements of the Public Service Vehicle (PSV) Accessibility Regulations (NI) 2003, by 2012.</p>	<p>100% compliant.</p>	<p><b>Target achieved</b></p>
<p><b>Ulsterbus Compliance with current Translink Passenger Charter</b></p> <p><b>Reliability – Ulsterbus</b></p> <ul style="list-style-type: none"> <li>• 99.2% of all buses will run as planned.</li> </ul>	<p>100% of Ulsterbus services ran as planned in 2013.</p>	<p><b>Target achieved</b></p>

## Appendix 3: The Performance of Public Transport in Northern Ireland (2002 to 2014) (paragraph 4.15)

RTS Target	Position at 31 March 2014	Status
<p><b>Punctuality – Ulsterbus</b></p> <ul style="list-style-type: none"> <li>95% of all buses will arrive no more than seven minutes late.</li> </ul>	<p>94% of Ulsterbus services arrived no more than 7 minutes late in 2013.</p> <p>Poor punctuality on services during Autumn 2013 was due to increased traffic congestion caused primarily by road works. Translink subsequently carried out adjustments to driver schedules to remedy this slippage.</p>	<b>On Target for Achievement</b>
<p><b>Translink – Northern Ireland Railways (NIR)</b></p>		
<p>Retain services north of Whitehead and north and north-west of Ballymena – subject to successful results from the introduction of new trains and improved infrastructure on the rest of the network early in the period to 2012.</p>	<p>Phase 1 of the Coleraine to Derry upgrade was completed in March 2013.</p> <p>Other works carried out on the line, while Phase 1 was being completed, included safety improvement works, signal improvements at level crossings, culvert and bridge replacement works and refurbishment works at the Bann bridge.</p>	<b>Target achieved</b>
<p>All Class 80 and Class 450 trains replaced by new trains by 2012 – with the exception of Enterprise services.</p>	<p>23 new CAF Class 3000 train sets entered service between 2002 and 2004.</p> <p>A further 20 new CAF Class 4000 train sets entered service between 2010 and 2012.</p> <p>All 28 train sets of the obsolete Class 80 and Class 450 have been withdrawn from service by September 2012.</p> <p>The Class 3000 and 4000 trains are expected to remain in service until a proposed programme of line electrification comes on-line between 2025 and 2035.</p>	<b>Target achieved</b>
<p><b>Compliance with current Translink Passenger Charter</b></p> <p><b>Reliability – NIR</b></p> <p>99.2% of all trains (except Dublin) will run as planned.</p>	<p>100% of services ran as planned in 2013.</p>	<b>Target achieved</b>
<p><b>Reliability – NIR</b></p> <p>99.5% of trains on the Dublin line will run as planned.</p>	<p>99.9% of Dublin line services ran as planned in 2013.</p>	<b>Target achieved</b>

RTS Target	Position at 31 March 2014	Status
<p><b>Punctuality – NIR</b></p> <p>95% of trains on the Bangor line, Portadown line and Larne line will arrive no more than five minutes late.</p>	<p>98.5% of these services arrived no more than 5 minutes late.</p>	<p><b>Target achieved</b></p>
<p><b>Punctuality – NIR</b></p> <p>90% of trains on the Londonderry, Portrush and Dublin lines will arrive no more than 10 minutes late.</p>	<p>96% of these services arrived no more than 10 minutes late.</p>	<p><b>Target achieved</b></p>

## Appendix 3: The Performance of Public Transport in Northern Ireland (2002 – 2014) (paragraph 4.15)

### Performance v Belfast Metropolitan Transport Plan (BMTP) public transport related targets

BMTP Target	Position at 31 March 2014	Status
Morning peak bus speeds in the BMA's road network on main radial routes – 15% increase in bus speeds compared to 2001.	<p>Bus speeds in 2013 had reduced by 17% since 2001.</p> <p>An increase in passenger numbers has a direct impact on time spent loading and unloading at the kerbside, which affects overall bus speeds. A 32.9% increase in Metro passengers between 2005 and 2013 has contributed to a reduction in bus speeds.</p>	<b>Target unlikely to be achieved</b>
Car mode share of motorised journeys crossing a Belfast City Centre cordon – reduce to 54% by 2015 compared to 60% in 2001.	The 2013 Belfast Cordon survey reported 50.2% car mode share.	<b>Target achieved</b>
Monitor usage of public transport trips made by Metro bus service in the BMA – morning peak % change from 2005:  Bus + 28%.	Based on the introduction of Metro bus services in February 2005, there has been a 32.9% increase in Metro passenger numbers.	<b>Target achieved</b>
Number of public transport trips made by rail in the BMA – morning peak % change from 2001:  Rail + 67%  2001 - 02: 5,761,153 journeys  2014 - 15 target (+67%): >9,621,126 journeys.	<p>Measuring morning peak services on rail via ticketing system is not possible. Total passenger number increase is used as a proxy for peak hour passenger number increase.</p> <p>In 2013 -14 passenger journeys totalled 13,184,660 (12,354,660 local, 839,000 cross-border). Local journeys represent a 114.45% increase on the 2001 - 02 RTS base year.</p>	<b>Target achieved</b>



<b>BMTP Target</b>	<b>Position at 31 March 2014</b>	<b>Status</b>
Proposal to introduce Bus Rapid Transit (BRT) services to Belfast.	<p>Detailed design of BRT service ongoing. Public information events were held in East and West Belfast in 2013 and 2014. Planning approval granted for 520 space Park &amp; Ride facility in Dundonald, work on this to be completed by end of 2014. Translink bus services will service this Park &amp; Ride prior to BRT being operational in 2014.</p> <p>£20 million has been committed to buy 40 rapid transit vehicles for delivery in 2017.</p>	<b>Delayed but ongoing</b>

## Appendix 4: Bus Service Levels in Belfast Compared to Similar United Kingdom Cities (paragraph 5.21)

**Vehicle Kilometres per Head of Population and Population for Translink Metro Service (Belfast) and 6 other United Kingdom urban areas**

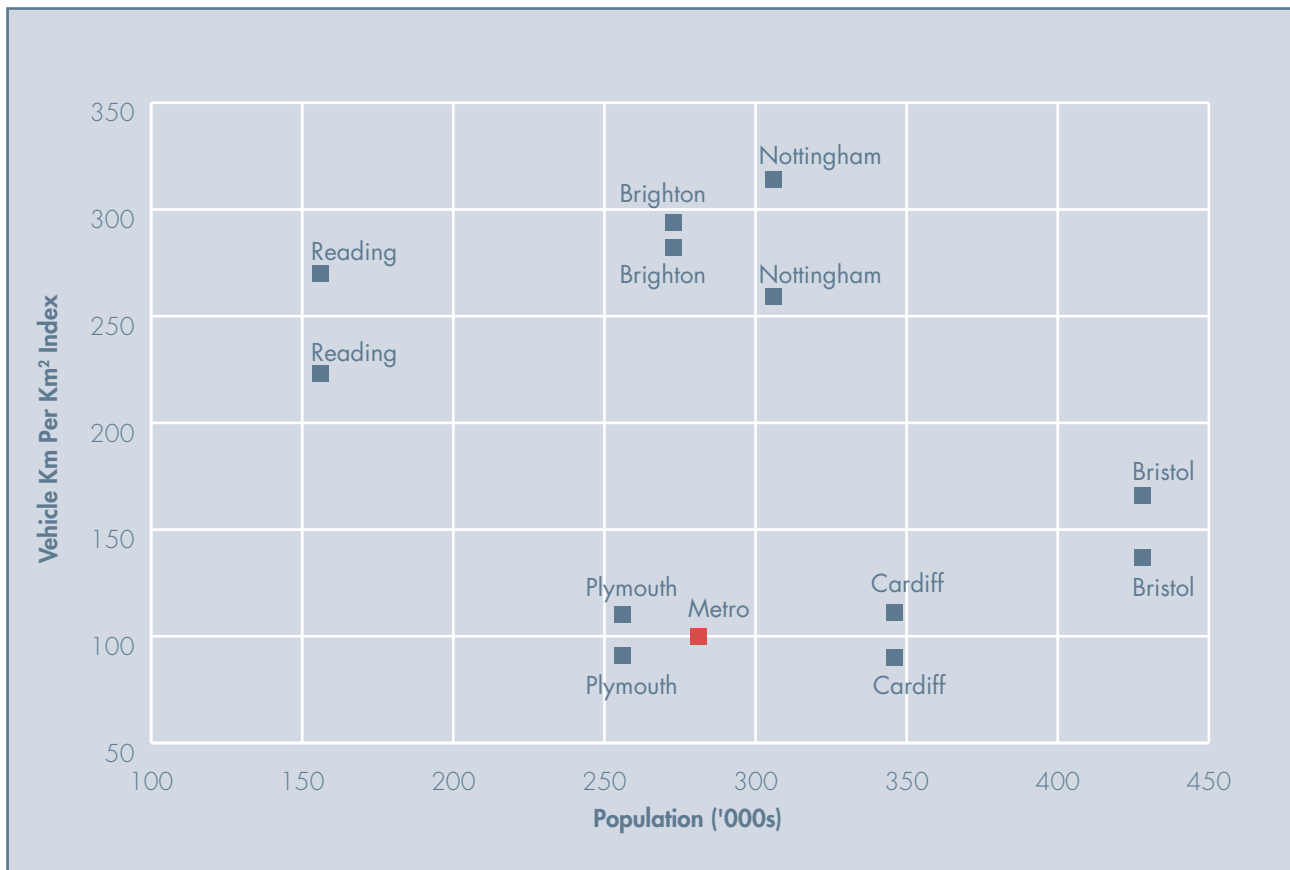


**Note:** In the absence of available published local data vehicle Km index values for each urban centre (excluding Metro) were derived from local company financial accounts and published Great Britain PTE and Non-PTE distance based costs (excluding London). This enables upper and lower boundaries to be placed on true vehicle Km estimates for each urban centre

Source: **Population Figures:** 2011 Census: Usual resident population, local authorities in England and Wales, Office of National Statistics; NISRA 2011 Northern Ireland Census; **Vehicle Km Figures:** TAS Partnership Ltd in Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010; Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 -13

This chart presents two vehicle kilometres per head of population values plotted for each of the 6 United Kingdom urban areas, one based on estimates derived from PTE area unit estimates and the other based on Non-PTE area unit estimates (see above). This enables upper and lower boundaries to be placed on true vehicle kilometres per head of population for each of the 6 urban areas. The figure uses an index scale with Translink Metro’s vehicle kilometres per head of population given a base value of 100.

### Vehicle Kilometres per Km<sup>2</sup> and Population for Translink Metro Service (Belfast) and 6 other United Kingdom urban areas



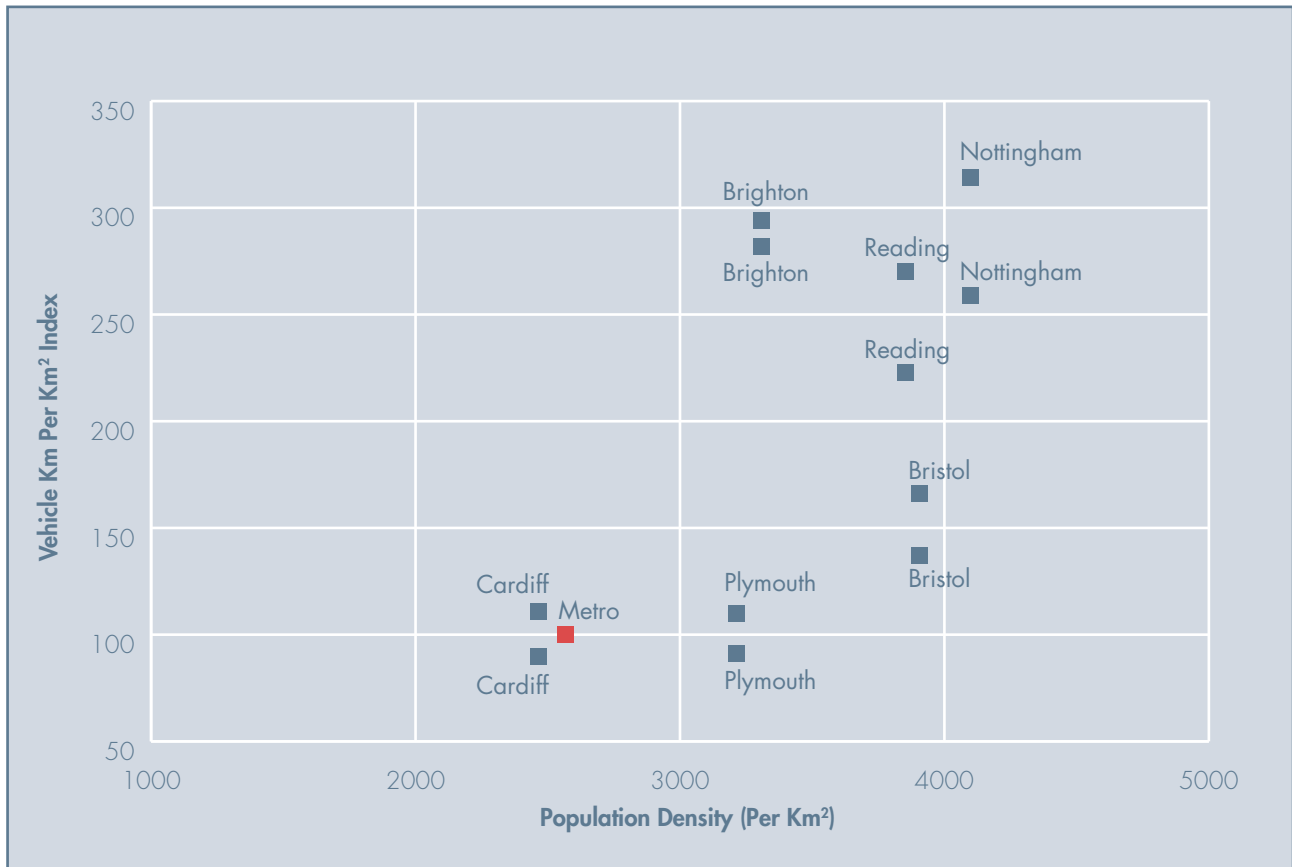
**Note:** In the absence of available published local data vehicle Km index values for each urban centre (excluding Metro) were derived from local company financial accounts and published Great Britain PTE and Non-PTE distance based costs (excluding London). This enables upper and lower boundaries to be placed on true vehicle Km estimates for each urban centre

Source: **Population Figures:** 2011 Census: Usual resident population, local authorities in England and Wales, Office of National Statistics; NISRA 2011 Northern Ireland Census; **Vehicle Km Figures:** TAS Partnership Ltd in Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010; Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13

Similar to the previous reasons highlighted, there are two vehicle kilometres per Km<sup>2</sup> values plotted for each of the 6 United Kingdom urban areas. The figure uses an index scale with Metro's vehicle kilometres per Km<sup>2</sup> given a base value of 100. The figure suggests Belfast performs poorly.

## Appendix 4: Bus Service Levels in Belfast Compared to Similar United Kingdom Cities (paragraph 5.21)

**Vehicle Kilometres per Km<sup>2</sup> and Population Density for Translink Metro Service (Belfast) and 6 other United Kingdom urban areas**



**Note:** In the absence of available published local data vehicle Km index values for each urban centre (excluding Metro) were derived from local company financial accounts and published Great Britain PTE and Non-PTE distance based costs (excluding London). This enables upper and lower boundaries to be placed on true vehicle Km estimates for each urban centre

Source: **Population Figures:** 2011 Census: Usual resident population, local authorities in England and Wales, Office of National Statistics; NISRA 2011 Northern Ireland Census; **Vehicle Km Figures:** TAS Partnership Ltd in Department for Regional Development, Review of Outline Business Case for Public Transport Reform, Final Report – December 2010; Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 -13

Similar to the reasons highlighted, there are two vehicle kilometres per Km<sup>2</sup> values plotted for each of the 6 United Kingdom urban areas. This figure plots the vehicle kilometres per Km<sup>2</sup> and population density for Translink Metro. The figure uses an index scale with Translink Metro given a base value of 100. The figure suggests Belfast performs poorly in absolute terms, but in line with lower density urban areas.

## Appendix 5: Bus - Quality of Service Levels Benchmarked (paragraph 5.30)

### Bus Customer Satisfaction Levels with Punctuality for Translink Metro Service and 6 other United Kingdom urban bus systems



Source: *Passenger Focus: Bus Passenger Survey Results*; *Cardiff City Council*; *Translink Independent Monitoring Update 2nd Issue 2013*

This illustrates the percentage of customers who are satisfied with the punctuality of the bus service in their area. Metro customers stated that 74% were satisfied with punctuality, towards the lower end of the peer group.

## Appendix 5: Bus - Quality of Service Levels Benchmarked (paragraph 5.30)

### Bus Customer Satisfaction Levels with Cleanliness for Translink Metro Service and 6 other United Kingdom urban bus systems



Source: *Passenger Focus: Bus Passenger Survey Results*; *Cardiff City Council*; *Translink Independent Monitoring Update 2nd Issue 2013*

This illustrates the percentage of customers who are satisfied with the cleanliness of the bus service in their area. Metro customers were the least satisfied (74%).

### Bus Customer Satisfaction Levels with Comfort for Translink Metro Service and 6 other United Kingdom urban bus systems



Source: *Passenger Focus: Bus Passenger Survey Results; Cardiff City Council; Translink Independent Monitoring Update 2nd Issue 2013*

This illustrates customers' satisfaction with the comfort of the bus service in their area. In line with fleet age and load factors, Metro customers stated that 89% were satisfied with comfort, the highest registered percentage.

## Appendix 5: Bus - Quality of Service Levels Benchmarked (paragraph 5.30)

**Bus Customer Satisfaction Levels with Seating Availability for Translink Metro Service and 6 other United Kingdom urban bus systems**



Source: *Passenger Focus: Bus Passenger Survey Results*; *Cardiff City Council*; *Translink Independent Monitoring Update 2nd Issue 2013*

This shows customer assessment of comfort levels for the peer group of urban areas. Surprisingly given the earlier load factor evidence, Metro had the second lowest satisfaction levels (87%).



### Bus Customer Satisfaction Levels with Information Provided for Translink Metro Service and 6 other United Kingdom urban bus systems



Source: *Passenger Focus: Bus Passenger Survey Results*; *Cardiff City Council*; *Translink Independent Monitoring Update 2nd Issue 2013*

This illustrates levels of satisfaction with the information provided for the bus service in their area. Metro customers stated that 82% were satisfied with information provided, towards the lower end of the peer group performance.

## Appendix 5: Bus - Quality of Service Levels Benchmarked (paragraph 5.30)

### Bus Customer Satisfaction Levels with Driver Helpfulness for Translink Metro Service and 6 other United Kingdom urban bus systems



Source: *Passenger Focus: Bus Passenger Survey Results*; *Cardiff City Council*; *Translink Independent Monitoring Update 2nd Issue 2013*

This illustrates the percentage of customers who are satisfied with the helpfulness of bus drivers in their area for Translink Metro Service and 6 other United Kingdom bus services. Among Metro customers, 78% were satisfied with helpfulness of the driver, the third lowest performance among the group assessed.

### Bus Customer Satisfaction Levels with Value for Money for Translink Metro Service and 6 other United Kingdom urban bus systems



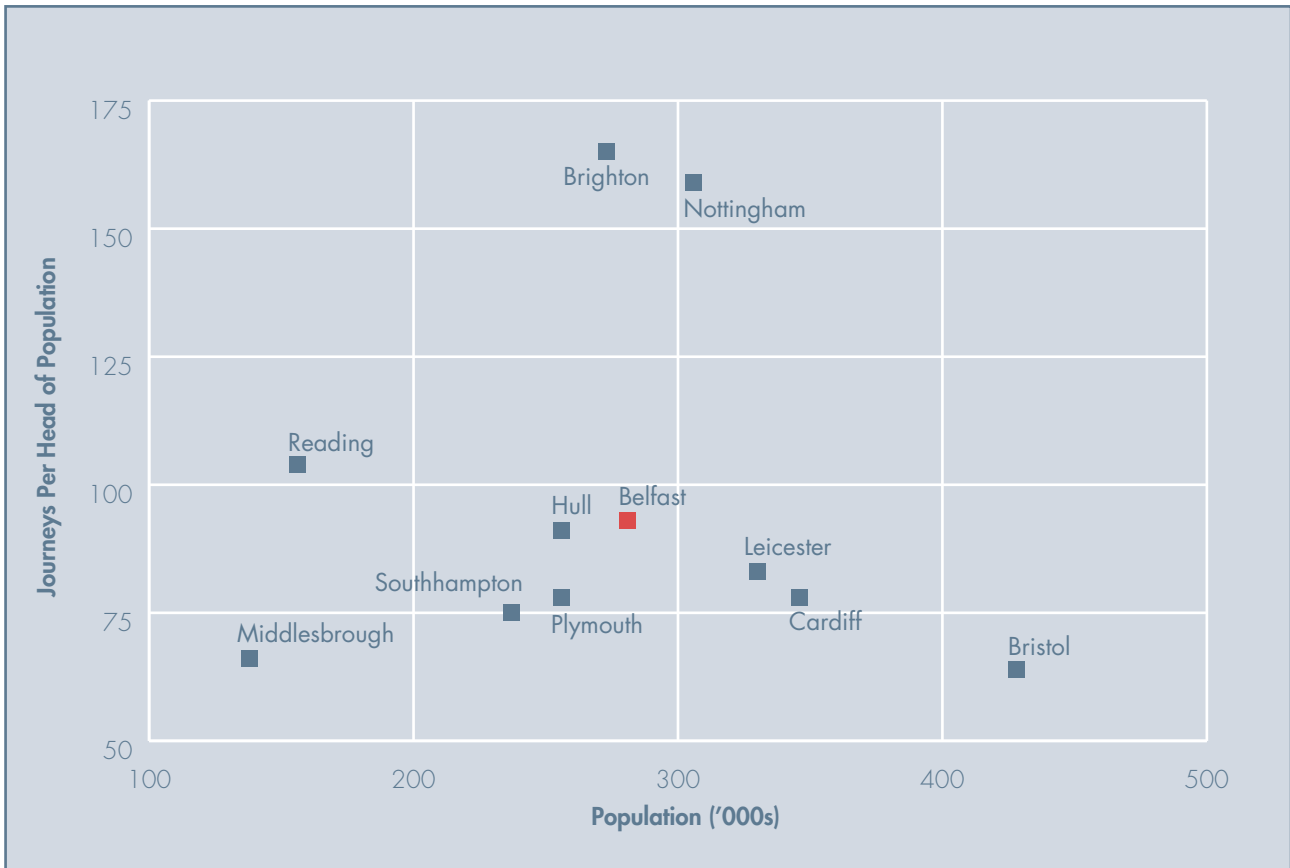
Sources: *Passenger Focus: Bus Passenger Survey Results*; *Cardiff City Council*; *Translink Independent Monitoring Update 2nd Issue 2013*

This illustrates the percentage of customers who are satisfied overall with the value for money offered by bus services in their area. Among Metro customers, 68% indicated they were satisfied with value for money of the service, a figure towards the middle of the performance scale.

## Appendix 6:

### Bus Passenger Journeys in Belfast Compared to Similar United Kingdom and European Cities (paragraph 5.36)

**Bus Passenger Journeys per Head of Population and Population for Belfast and 10 other United Kingdom Urban Areas**



Source: **Population Figures:** Office of National Statistics 2011 Census: Usual resident population, local authorities in England and Wales; NISRA 2011 Northern Ireland Census; **Journey Figures:** Department for Transport, Bus Statistics (<https://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics>); Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13

This chart plots the bus passenger journeys per head of population and population for Belfast and 10 other United Kingdom urban areas. The figure highlights that for a city of its population, bus ridership per head is low in comparison to best performers e.g. Nottingham and Brighton both of whose public transport systems are widely praised. However, it does perform better than many other United Kingdom urban centres of its size.

**Bus Passenger Journeys per Km<sup>2</sup> and Population for Belfast and 10 other United Kingdom Urban Areas**



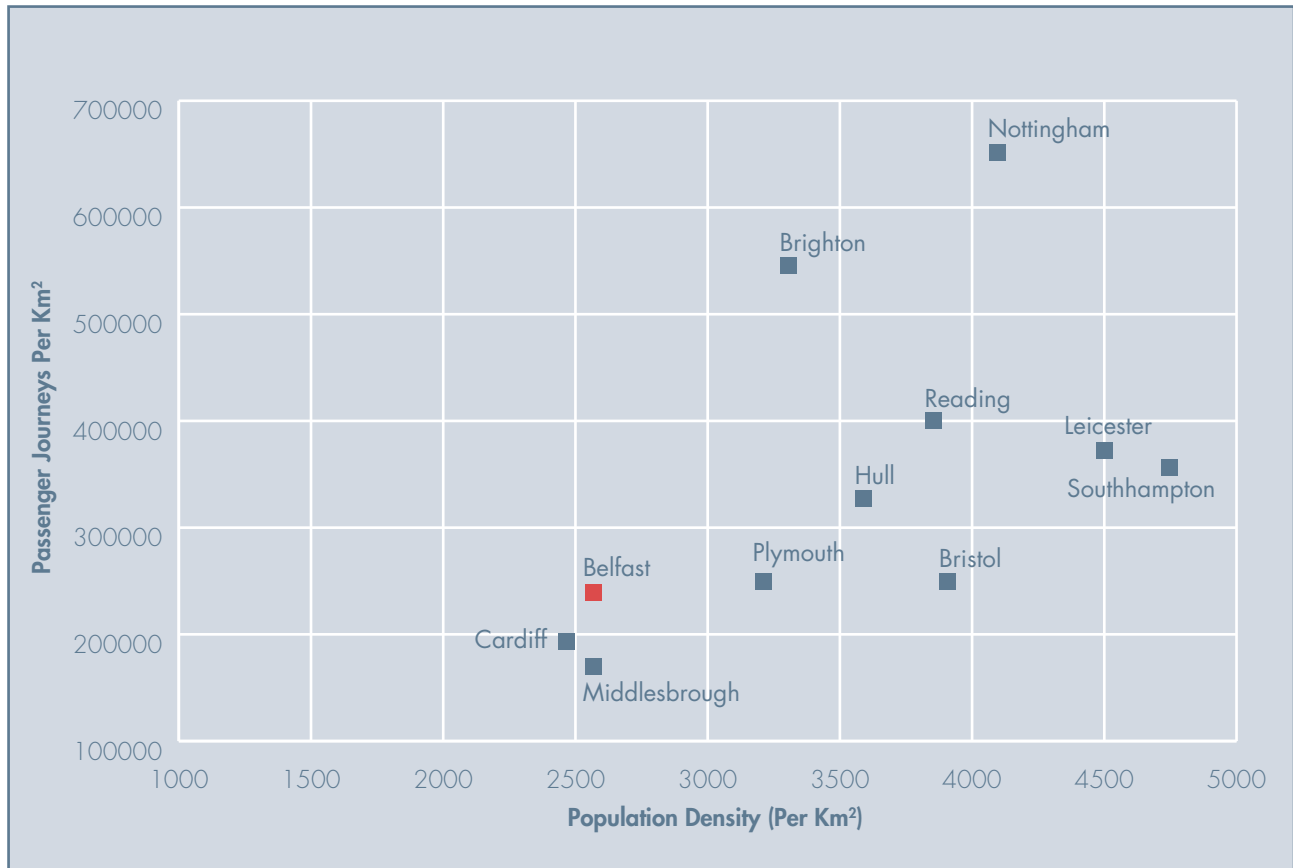
Source: **Population Figures:** Office of National Statistics 2011 Census: Usual resident population, local authorities in England and Wales; NISRA 2011 Northern Ireland Census; **Journey Figures:** Department for Transport, Bus Statistics (<https://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics>); Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13

This chart plots the bus passenger journeys per Km<sup>2</sup> and population for Belfast and 10 other United Kingdom urban areas. This seeks to take into account the spatial incidence of bus ridership and the total population of the relevant population centres. Here, Belfast performs poorly compared to its peers.

## Appendix 6:

### Bus Passenger Journeys in Belfast Compared to Similar United Kingdom and European Cities (paragraph 5.36)

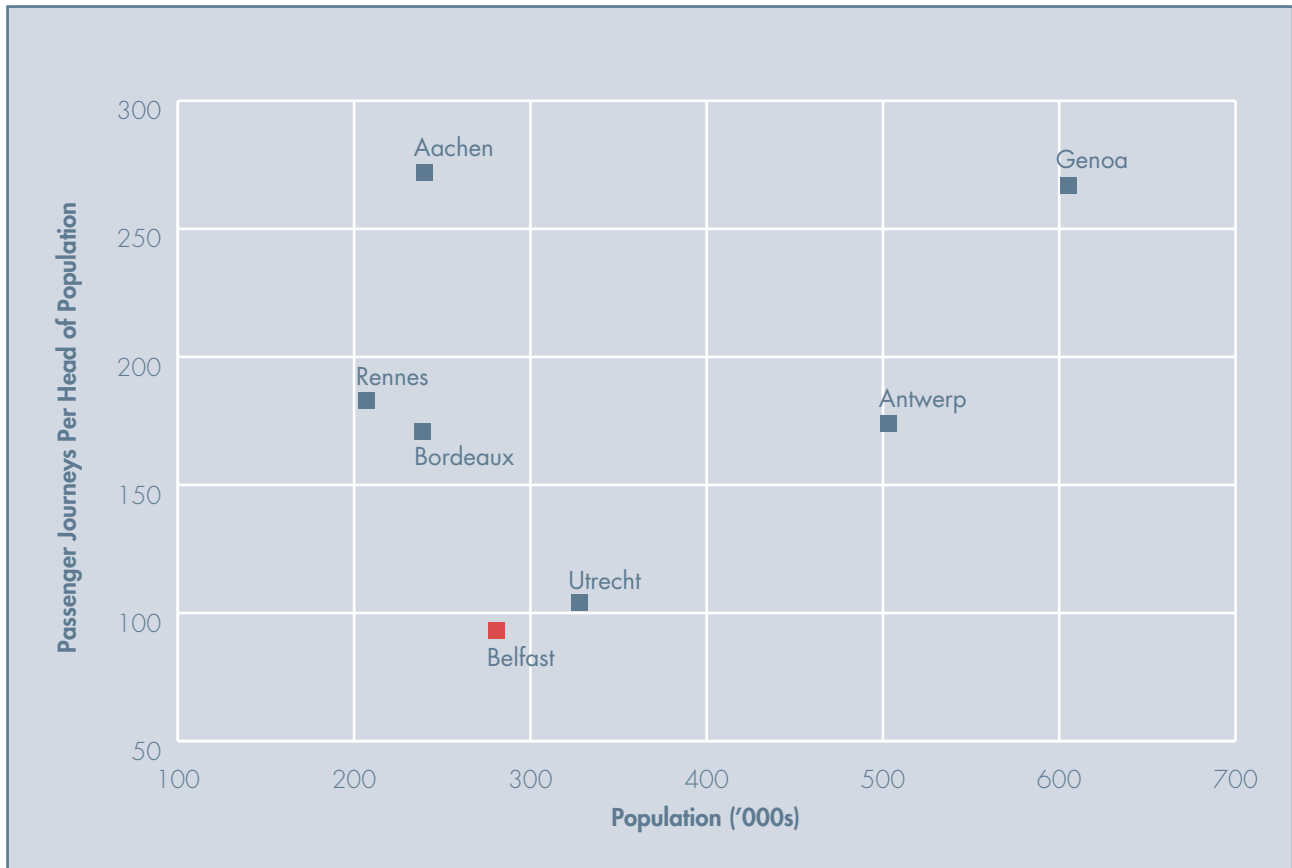
**Bus Passenger Journeys per Km<sup>2</sup> and Population Density for Belfast and 10 other United Kingdom Urban Areas**



Source: **Population Figures:** Office of National Statistics 2011 Census; Usual resident population, local authorities in England and Wales; NISRA 2011 Northern Ireland Census; **Journey Figures:** Department for Transport, Bus Statistics (<https://www.gov.uk/government/organisations/department-for-transport/series/bus-statistics>); Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13

This chart shows bus passenger journeys per Km<sup>2</sup> and population density for Belfast and 10 other United Kingdom urban areas. Population density is thought to be a key determinant of public transport use and market share. This does point to the key roles that population loss and with it low densities of population have had on bus ridership in Belfast.

### Bus Passenger Journeys per Head of Population and Population for Belfast and 6 European Urban Areas



Source: **Population Figures:** NISRA 2011 Northern Ireland Census; Statistics Belgium; Statistics Netherlands; Federal Statistics Office of Germany; French Land Register; **Journey Figures:** Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13; Jane's Urban Transport Systems 2012 - 13

This chart extends the analysis of bus passenger journeys per head of population and population for Belfast to 6 European urban areas of similar size. This figure clearly demonstrates the weak performance of Metro in securing market share – it has the lowest passenger journeys per head of population.

## Appendix 6:

### Bus Passenger Journeys in Belfast Compared to Similar United Kingdom and European Cities (paragraph 5.36)

**Bus Passenger Journeys per Km<sup>2</sup> and Population for Belfast and 6 European Urban Areas**



Source: **Population Figures:** NISRA 2011 Northern Ireland Census; Statistics Belgium; Statistics Netherlands; Federal Statistics Office of Germany; French Land Register; **Journey Figures:** Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13; Jane's Urban Transport Systems 2012 - 13

This chart plots the bus passenger journeys per Km<sup>2</sup> and urban centre population for Belfast and 6 European urban areas of similar size. Once again Belfast is the poorest performer.



### Bus Passenger Journeys per Km<sup>2</sup> and Population Density for Belfast and 6 European Urban Areas

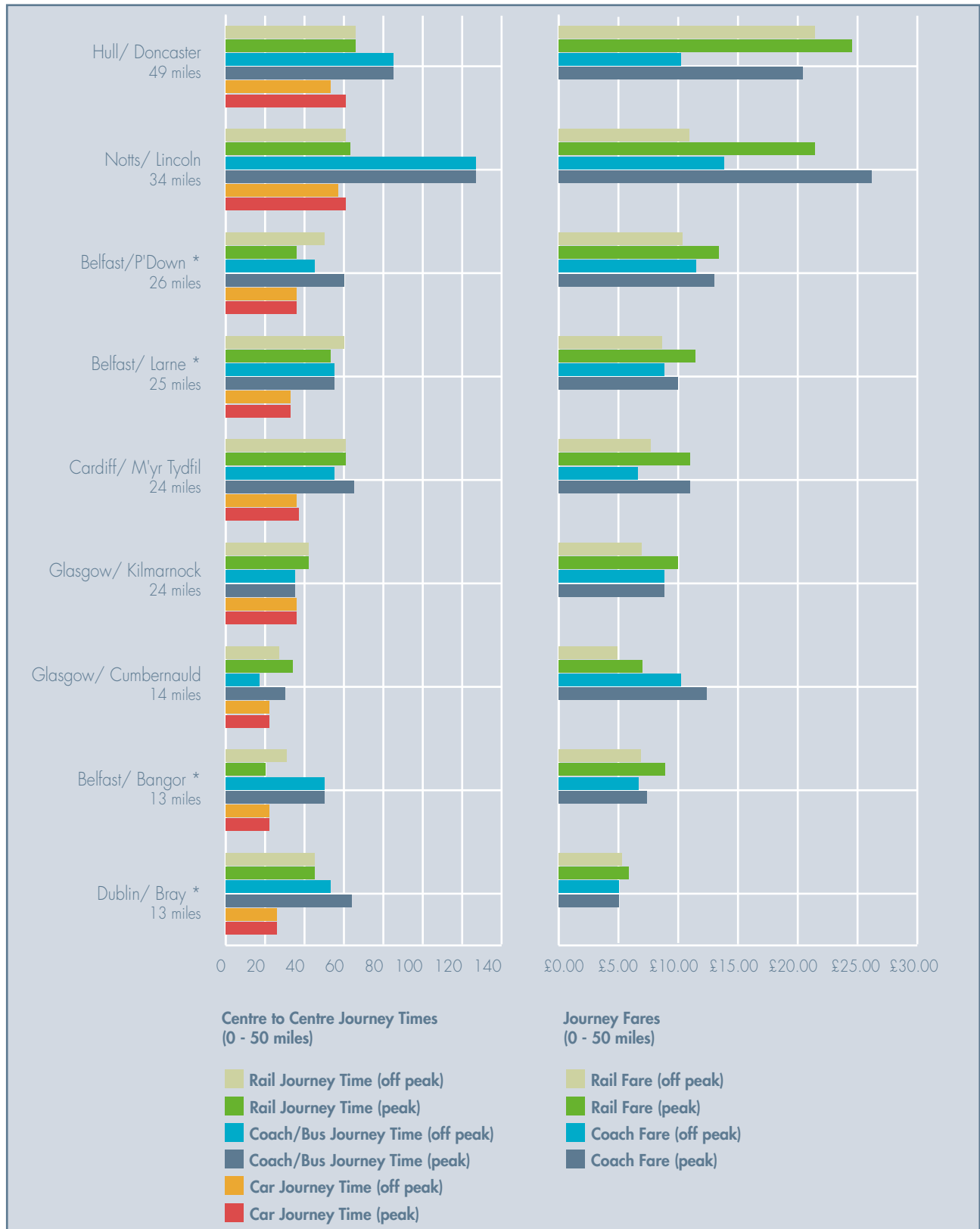


Source: **Population Figures:** NISRA 2011 Northern Ireland Census; Statistics Belgium; Statistics Netherlands; Federal Statistics Office of Germany; French Land Register; **Journey Figures:** Department for Regional Development (NI) Northern Ireland Transport Statistics 2012 - 13; Jane's Urban Transport Systems 2012 - 13

This chart extends the comparison with continental centres to consideration of population density. This plots the bus passenger journeys per Km<sup>2</sup> and population density for Belfast and 6 European urban areas of similar size. Here the interesting feature is that for continental cities, low population density does not appear to be a barrier to significantly higher levels of ridership as appears to be the barrier to Belfast development.

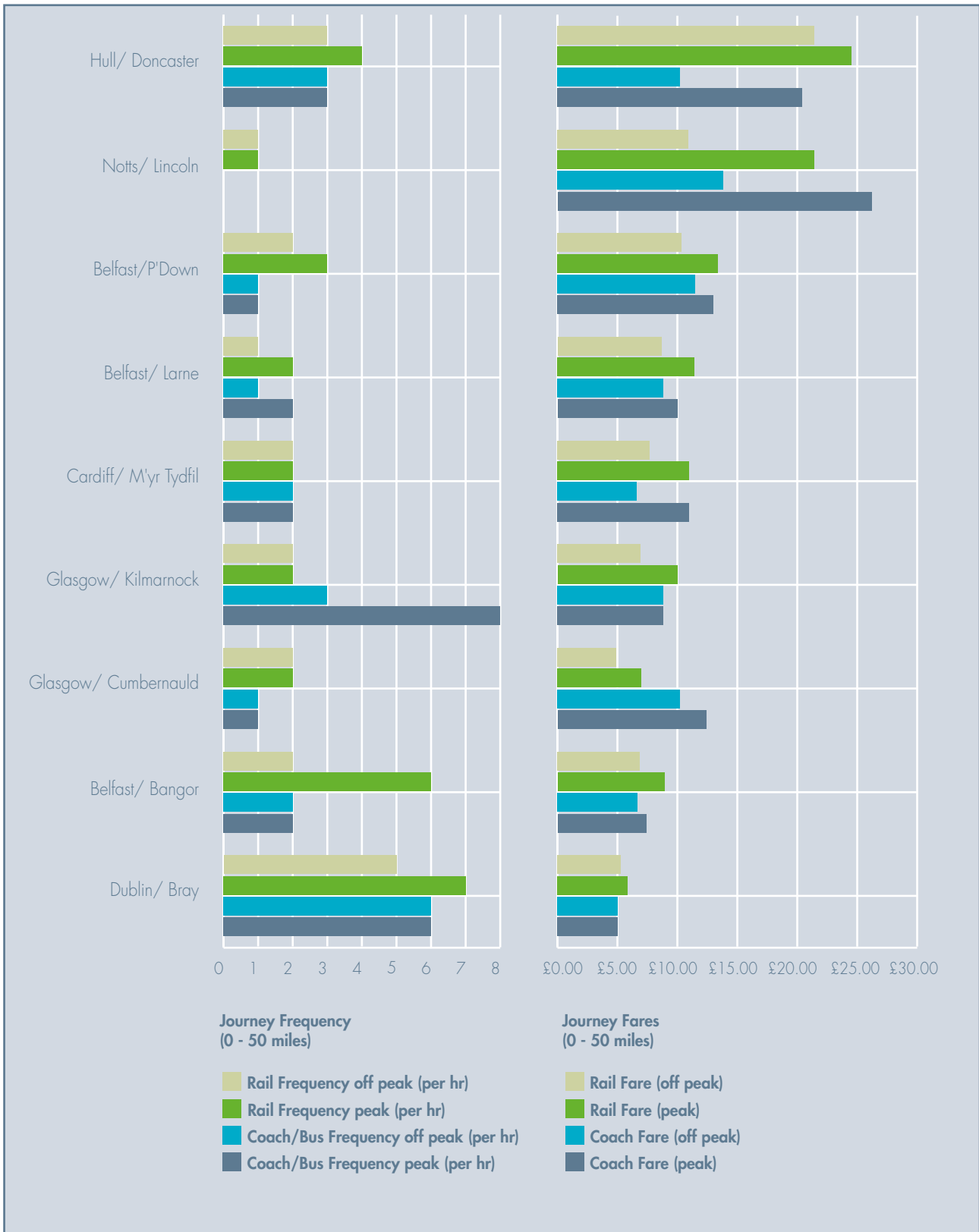
# Appendix 7: Rail – Competiveness versus Coach and Car (paragraph 5.41)

Figure (a) Transport Mode Competiveness (0 - 50 miles) Journey Times and Fares



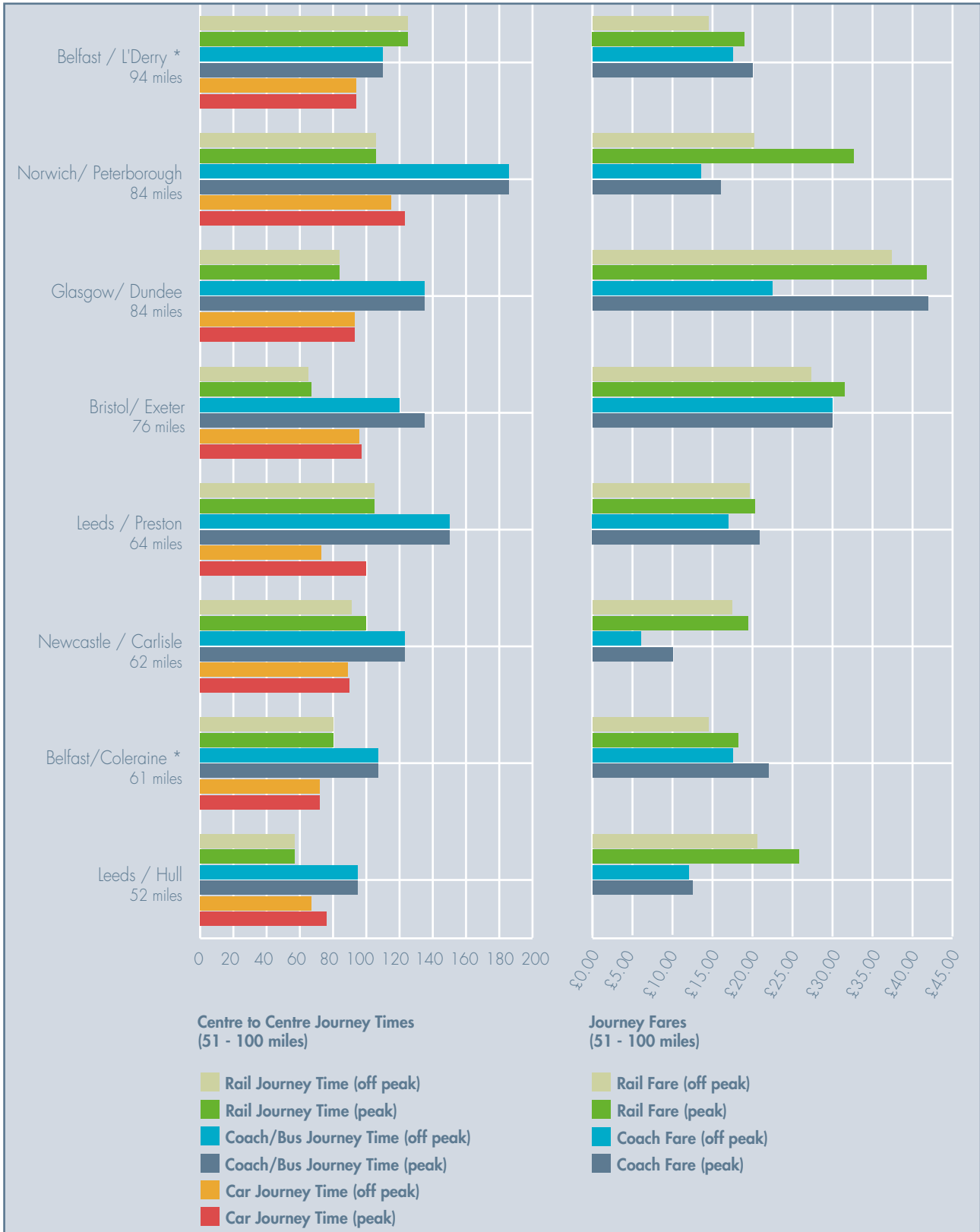
\*Note: at the time the above figures were compiled, we were unable to identify data to differentiate peak and off-peak car journey times

Figure (b) Transport Mode Competitiveness (0 - 50 miles) Journey Frequency and Fares



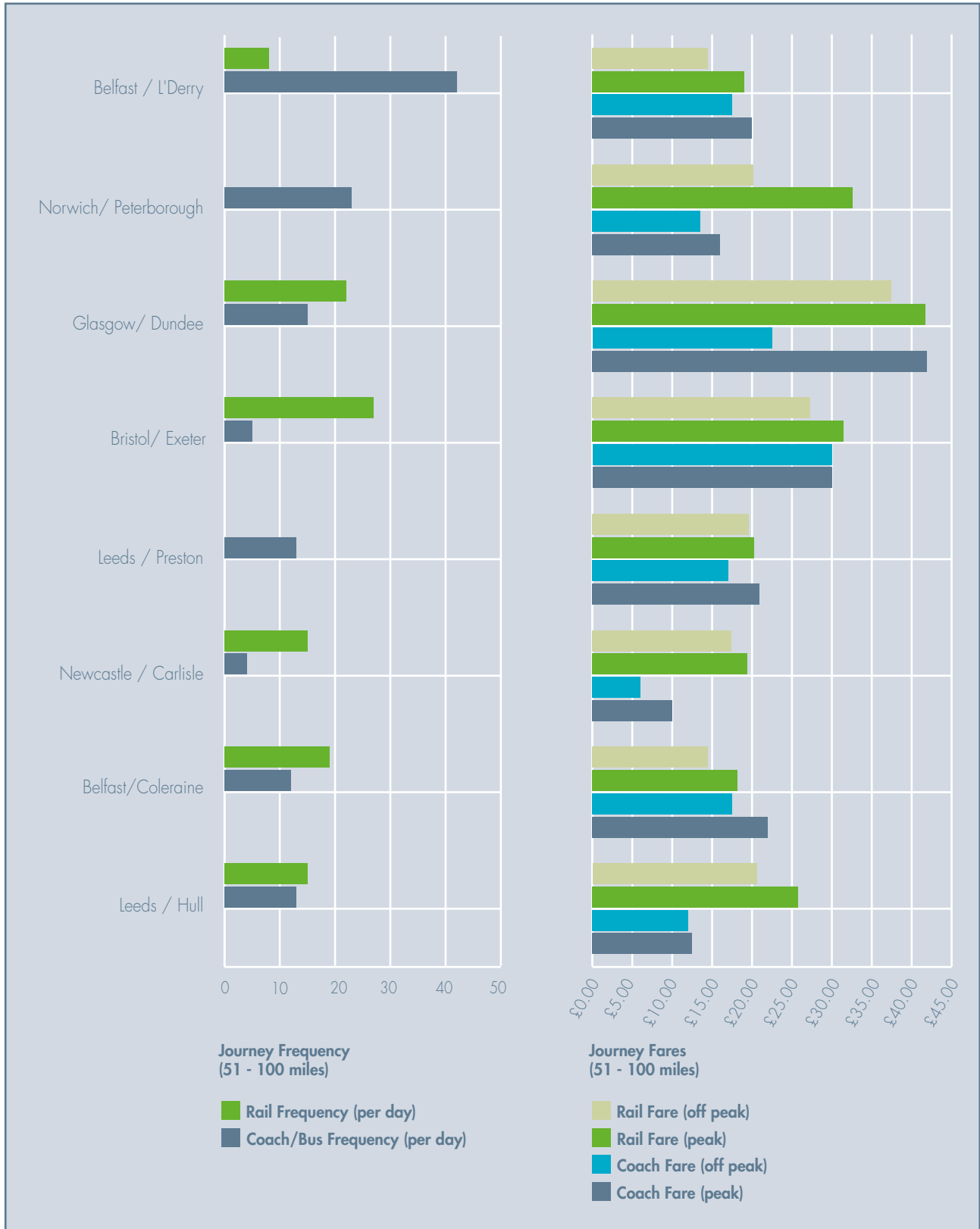
# Appendix 7: Rail – Competiveness versus Coach and Car (paragraph 5.41)

Figure (c) Transport Mode Competiveness (51-100 miles) Journey Times and Fares



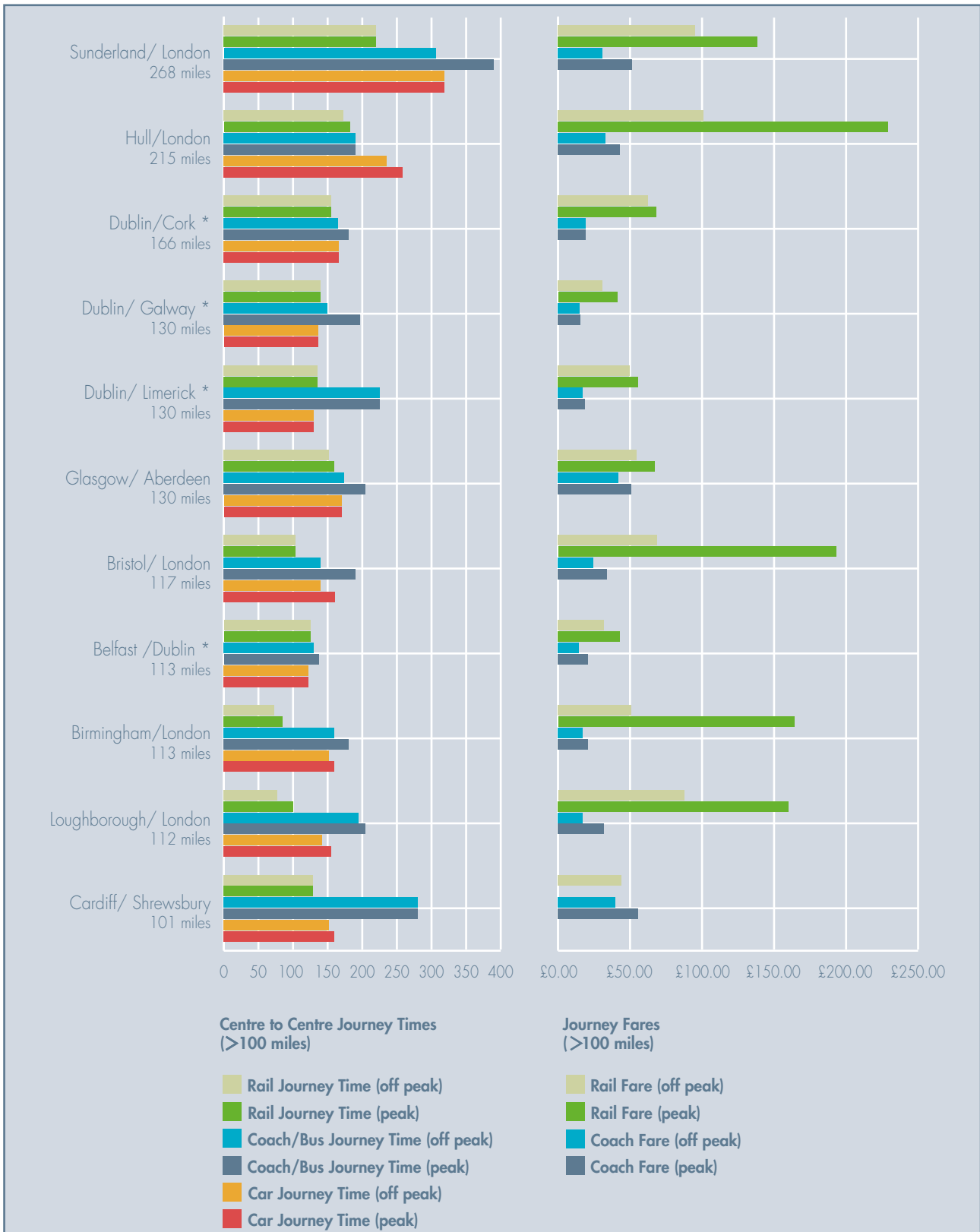
\*Note: at the time the above figures were compiled, we were unable to identify data to differentiate peak and off-peak car journey times

Figure (d) Transport Mode Competitiveness (51- 100 miles) Journey Frequency and Fares



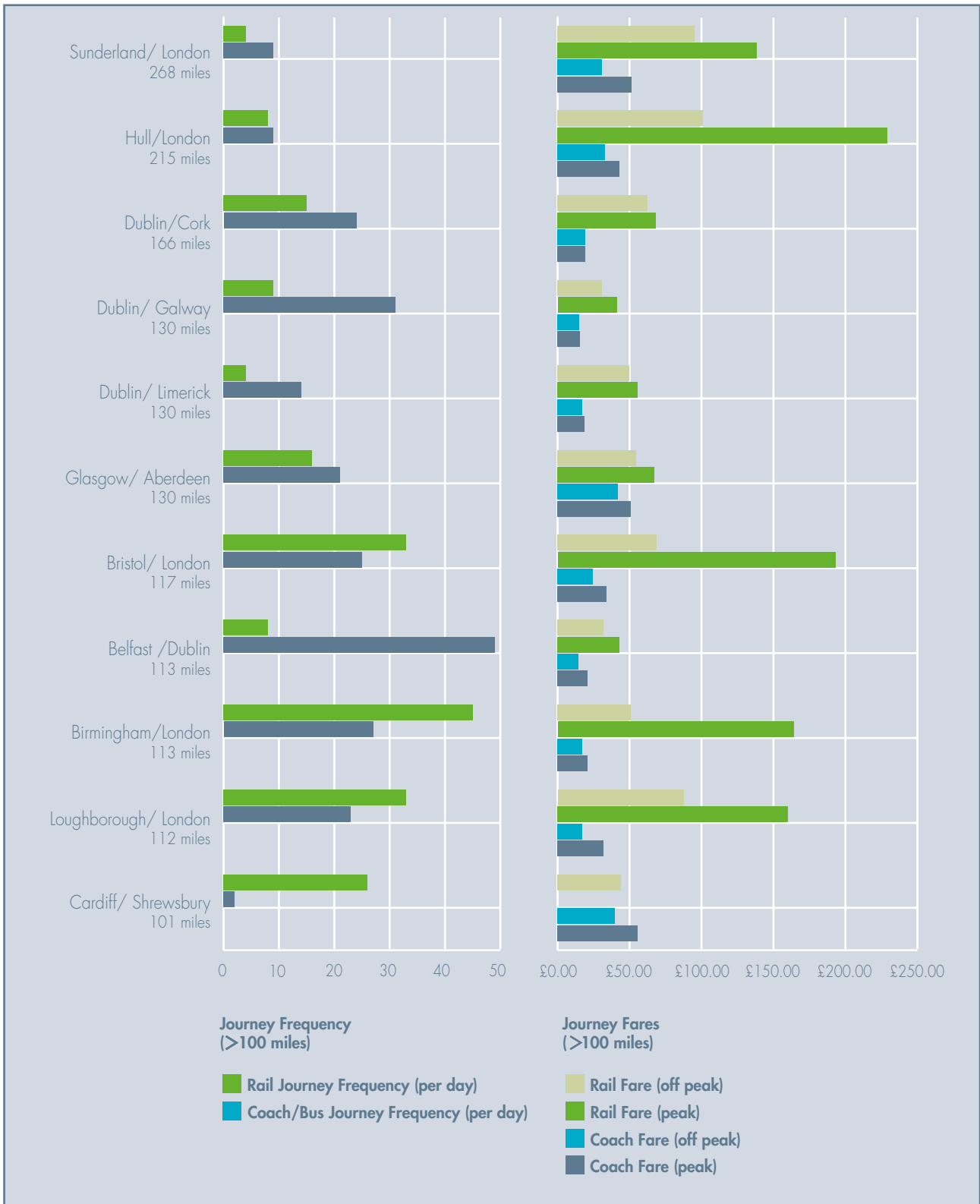
# Appendix 7: Rail – Competiveness versus Coach and Car (paragraph 5.41)

Figure (e) Transport Mode Competiveness (>100 miles) Journey Times and Fares



\*Note: at the time the above figures were compiled, we were unable to identify data to differentiate peak and off-peak car journey times

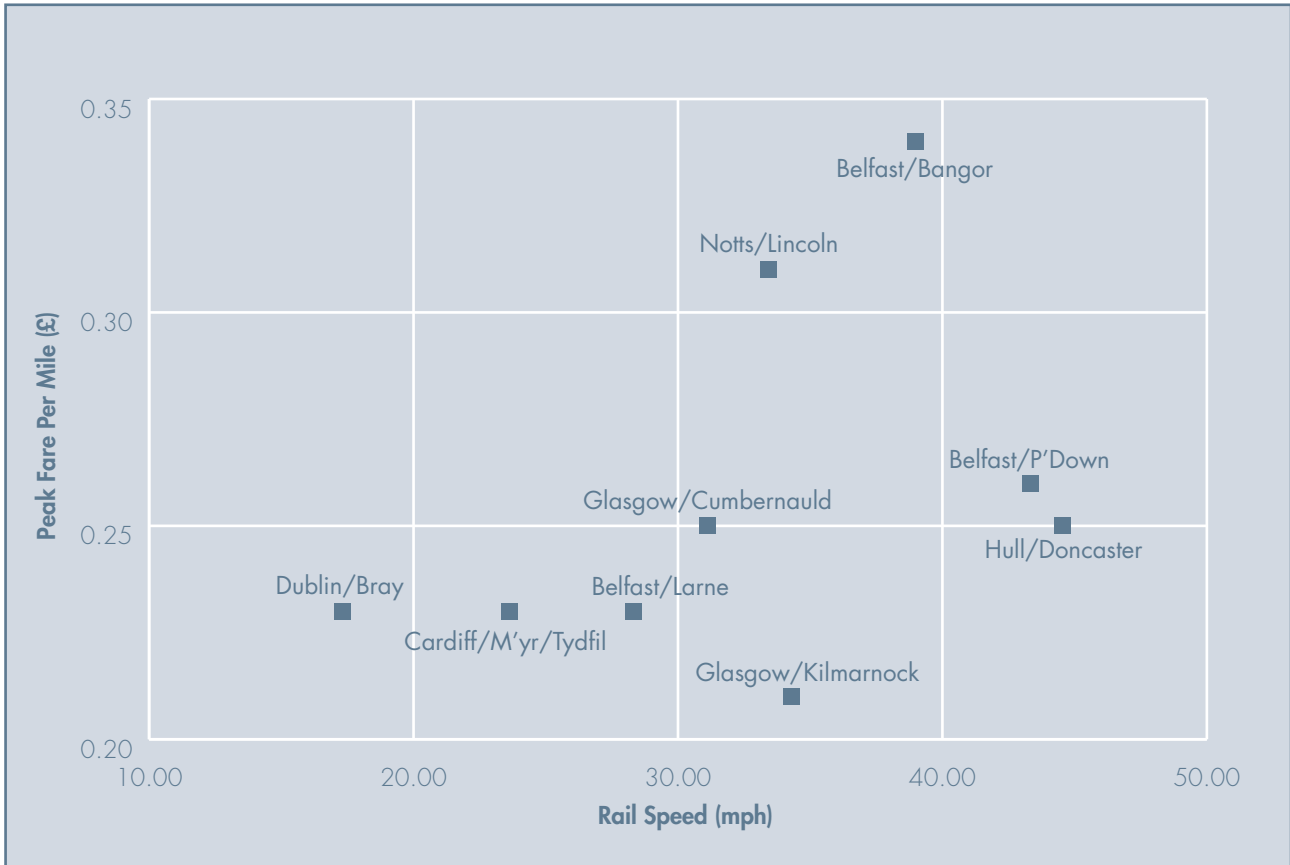
Figure (f) Transport Mode Competitiveness (>100 miles) Journey Frequency and Fares



Source for Figures (a - f): National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners/Telephone Call Confirmations, UK and Ireland Coach Operator Journey Planners/Telephone Call Confirmations and Highway/Route Planners

## Appendix 8: NIR Potential Revenue Yield (paragraph 5.45)

Revenue Yield as a Function of Rail Speed (Journeys under 50 miles)

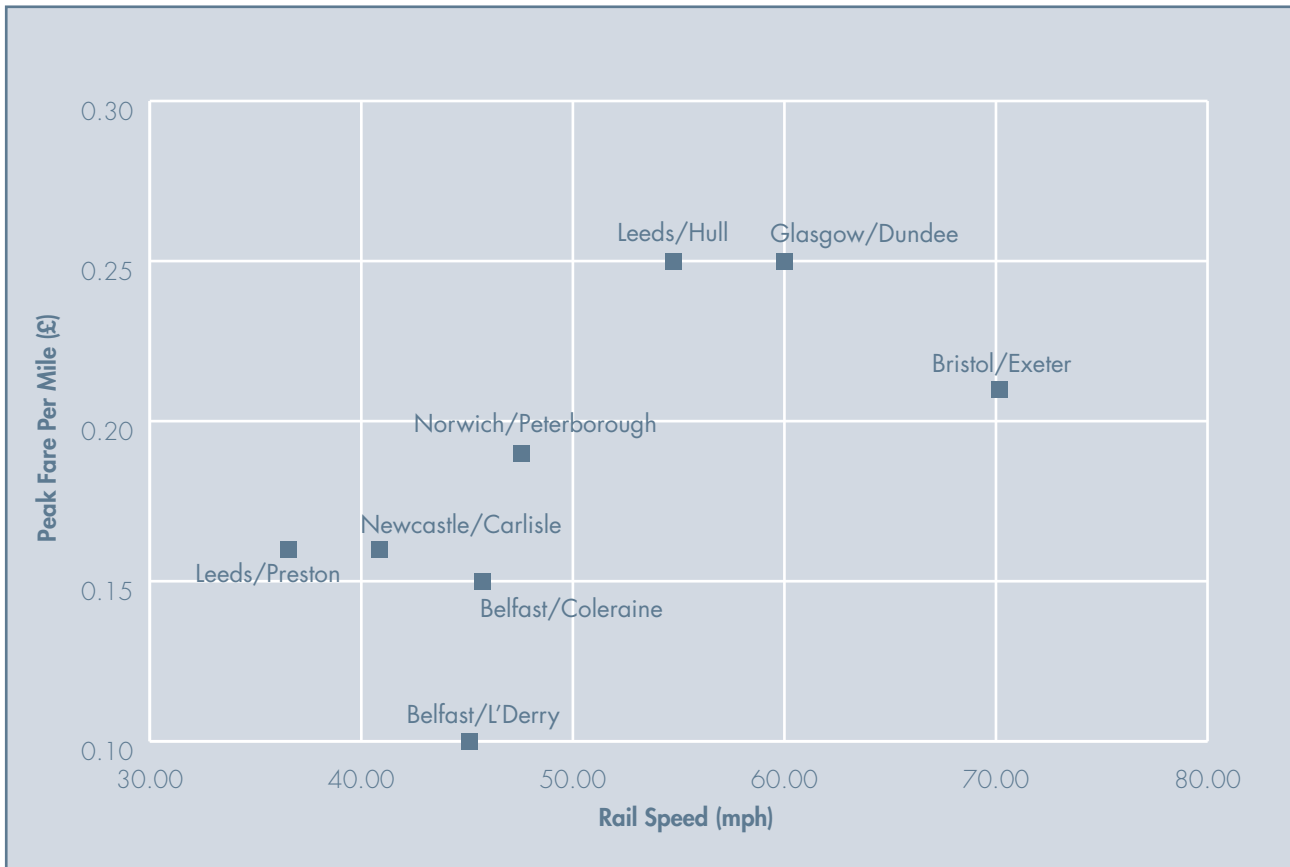


Source: National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners, Operator Timetables

This shows that the Belfast/Bangor revenue yield is the highest compared to all other journeys benchmarked.



## Revenue Yield as a Function of Rail Speed (Journeys between 51 and 100 miles)

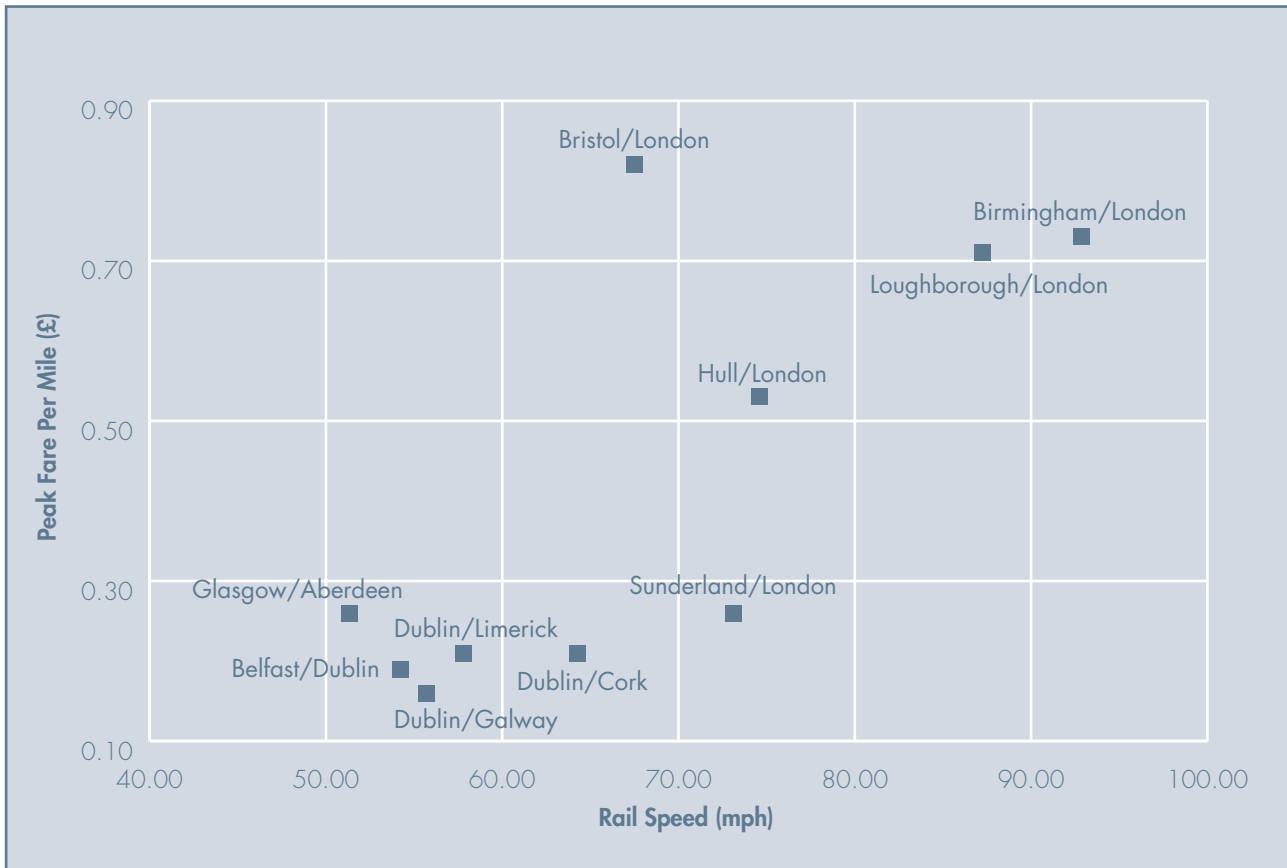


Source: National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners, Operator Timetables

This shows that the Belfast / Londonderry revenue yield is the worst compared to all other journeys benchmarked.

## Appendix 8: NIR Potential Revenue Yield (paragraph 5.45)

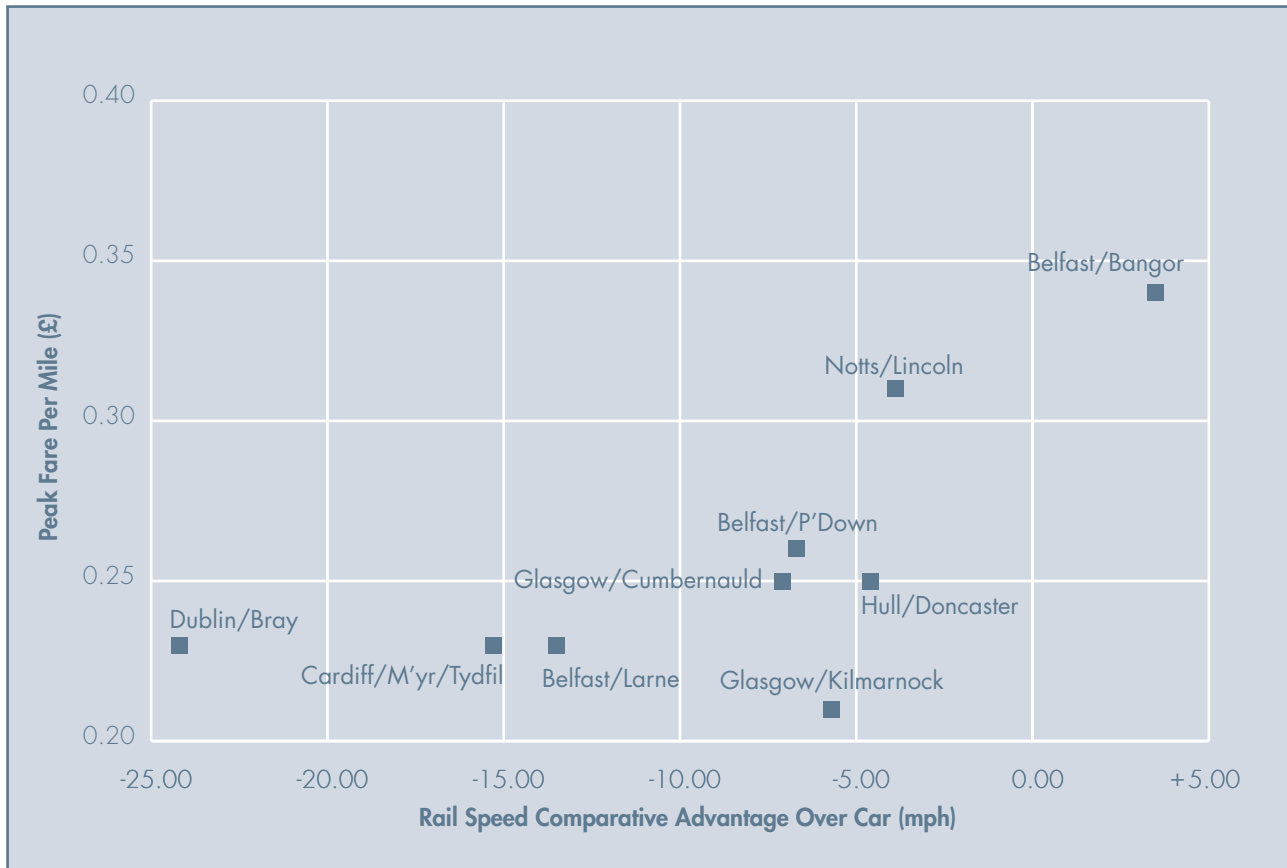
Revenue Yield as a Function of Rail Speed (Journeys over 100 miles)



Source: National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners, Operator Timetables

This shows that the Belfast / Dublin revenue yield is second worst in class in comparison to other benchmarked journeys.

### Revenue Yield as a Function of Rail Speed Comparative Advantage over Car (Journeys under 50 miles)

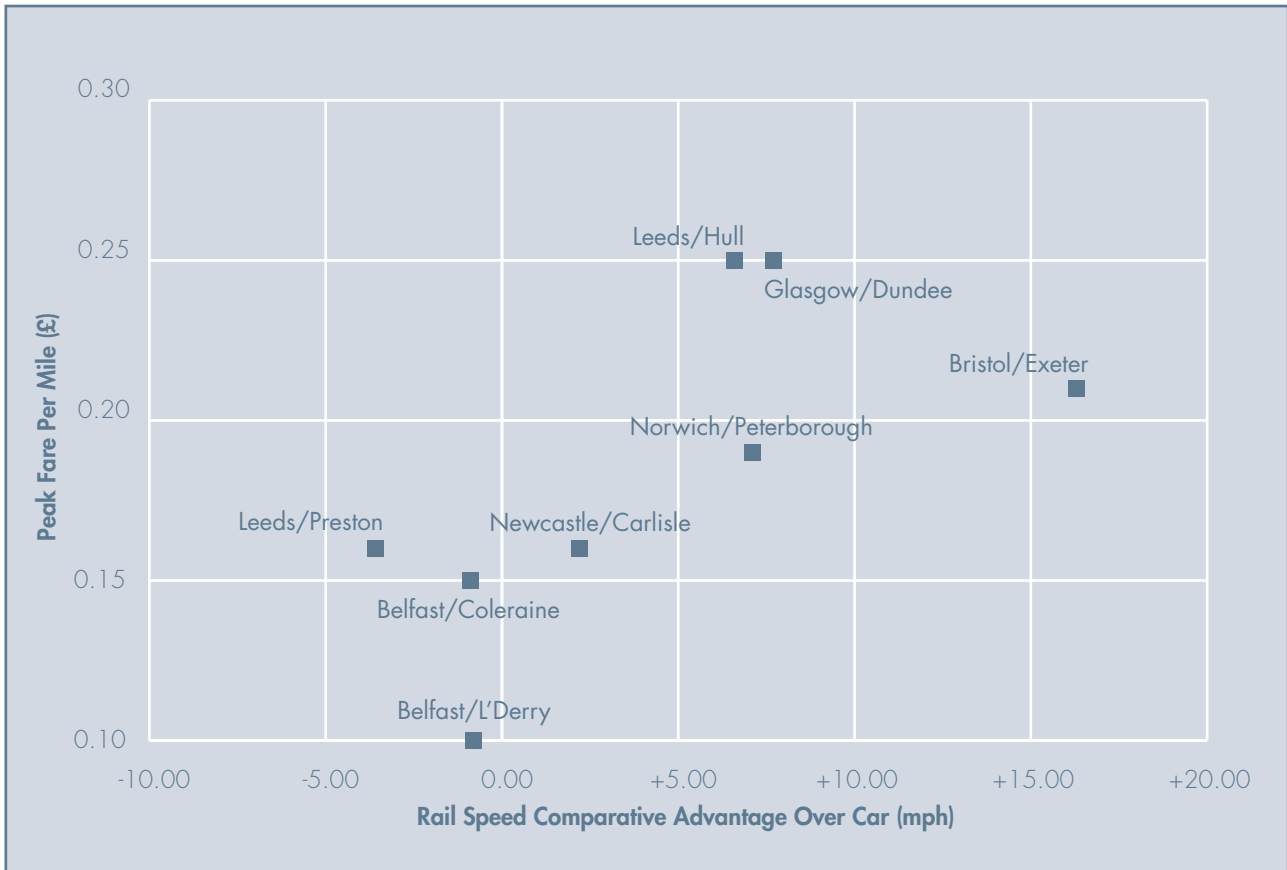


Source: National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners, Operator Timetables

This shows that the Belfast / Bangor revenue yield is the highest compared to all other journeys benchmarked.

## Appendix 8: NIR Potential Revenue Yield (paragraph 5.45)

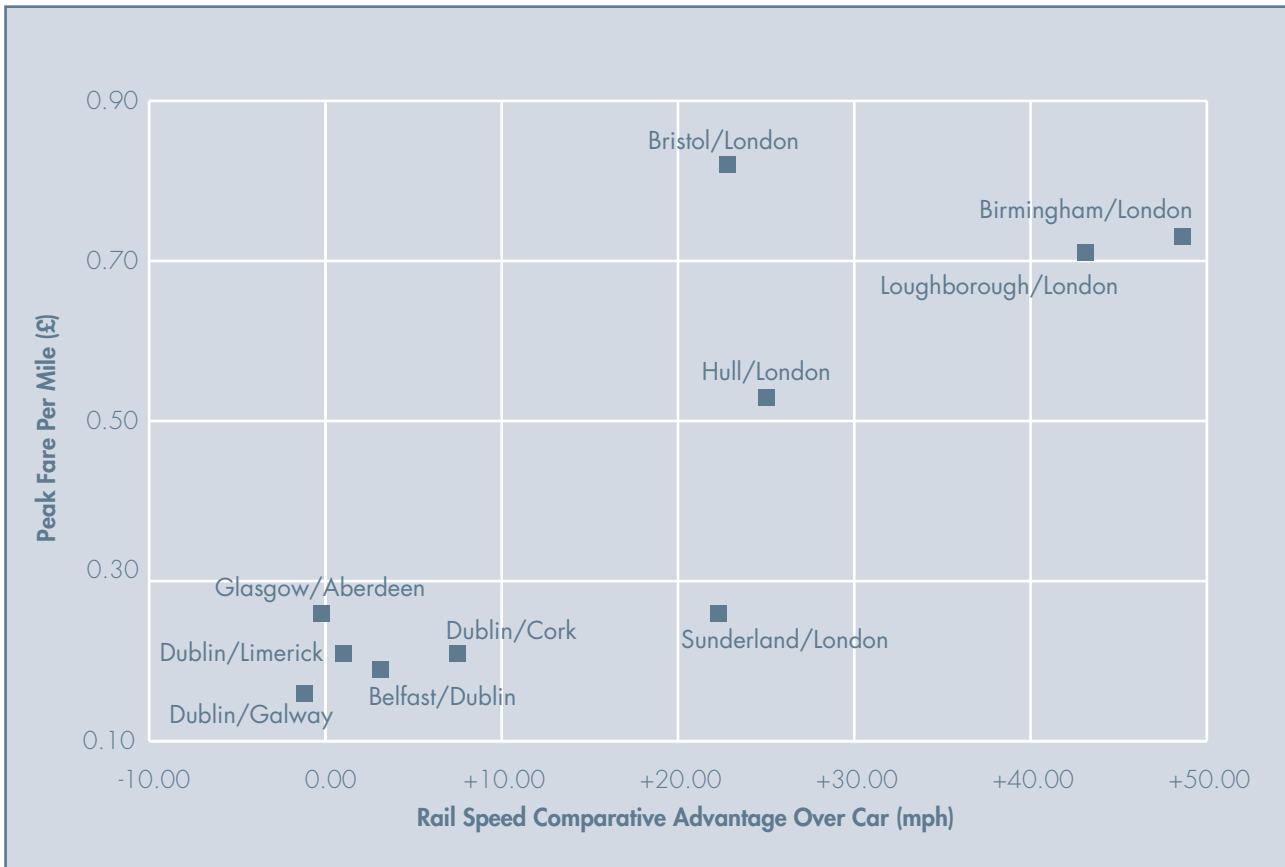
Revenue Yield as a Function of Rail Speed Comparative Advantage over Car (Journeys between 51 and 100 miles)



Source: National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners, Operator Timetables

This shows that the Belfast / Londonderry revenue yield is the worst compared to all other journeys benchmarked.

### Revenue Yield as a Function of Rail Speed Comparative Advantage over Car (Journeys over 100 miles)

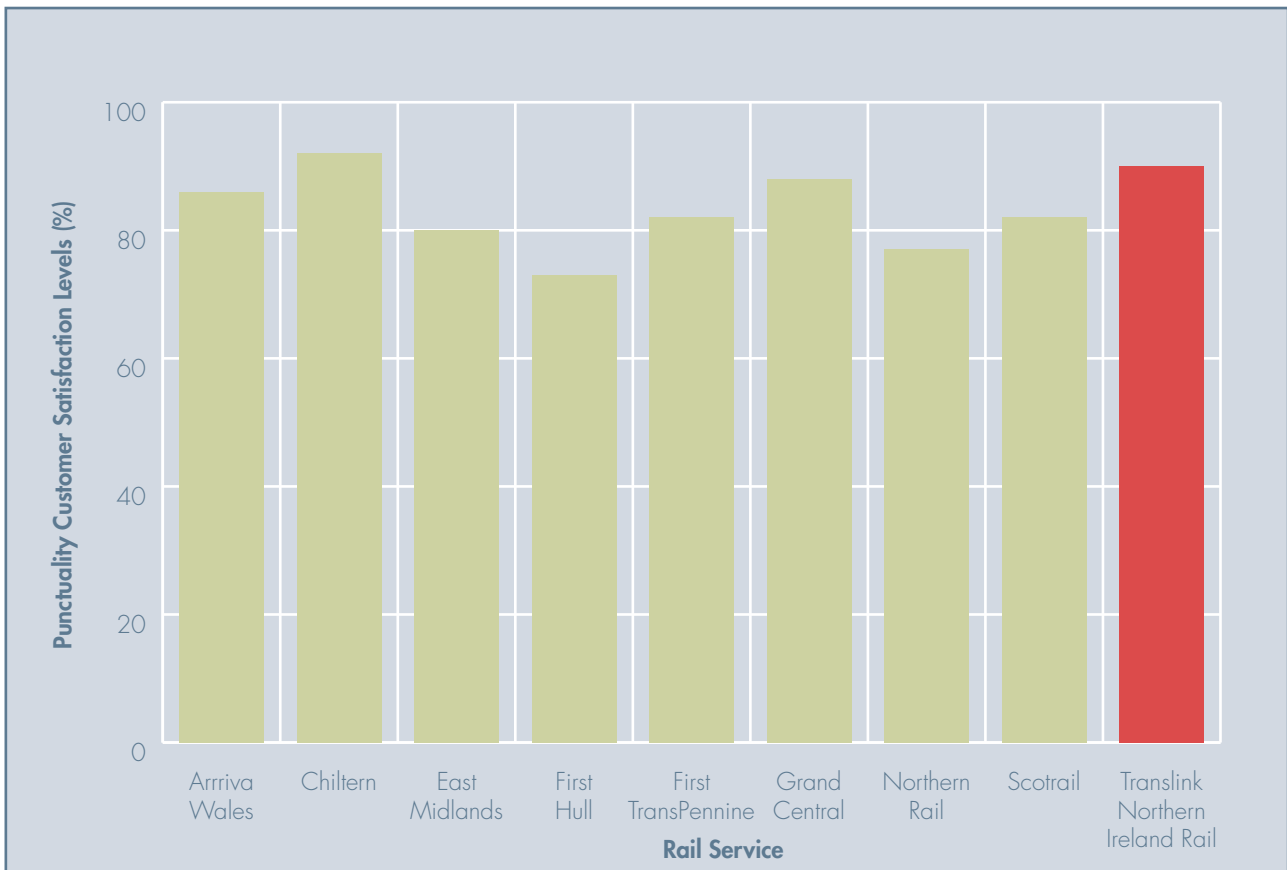


Source: National Rail, Translink, Irish Rail, GB Rail Operator Journey Planners, Operator Timetables

This shows that the Belfast / Dublin revenue yield is second worst in class in comparison to other benchmarked journeys.

## Appendix 9: Rail - Quality of Service Levels Benchmarked (paragraph 5.46)

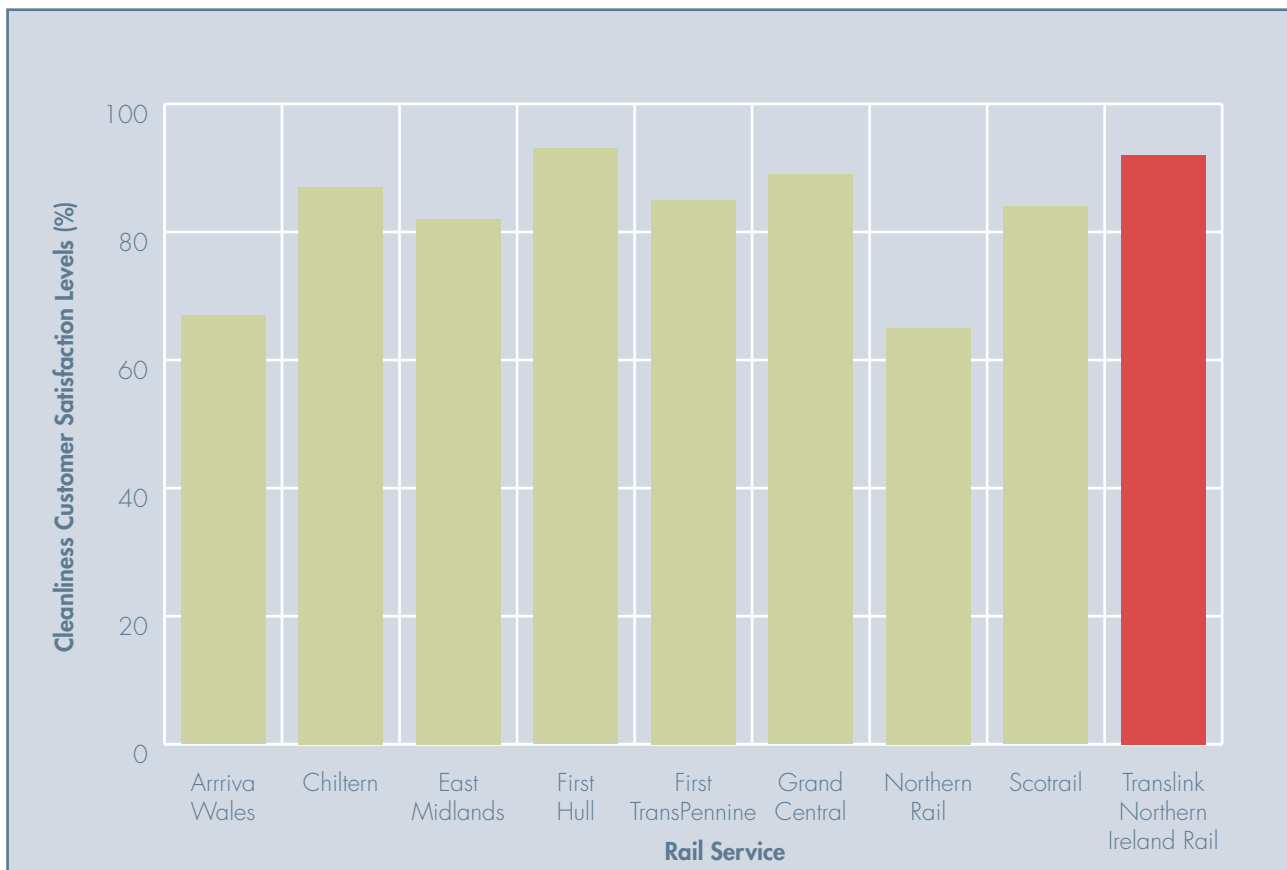
### Rail Customer Satisfaction Levels with Punctuality for Northern Ireland Rail and 8 other United Kingdom Rail Services



Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1st Update 2014

This illustrates the percentage of customers who are satisfied with the punctuality of the rail service in their area. Results are provided for Northern Ireland Rail and 8 other United Kingdom Rail Operators. The highest levels of satisfaction were recorded by passengers of Chiltern (92%) while the lowest were recorded by First Hull (73%) passengers. 90% of Northern Ireland Rail passengers were satisfied with the punctuality of the rail service, representing the second best performance.

### Rail Customer Satisfaction Levels with Cleanliness for Northern Ireland Rail and 8 other United Kingdom Rail Services

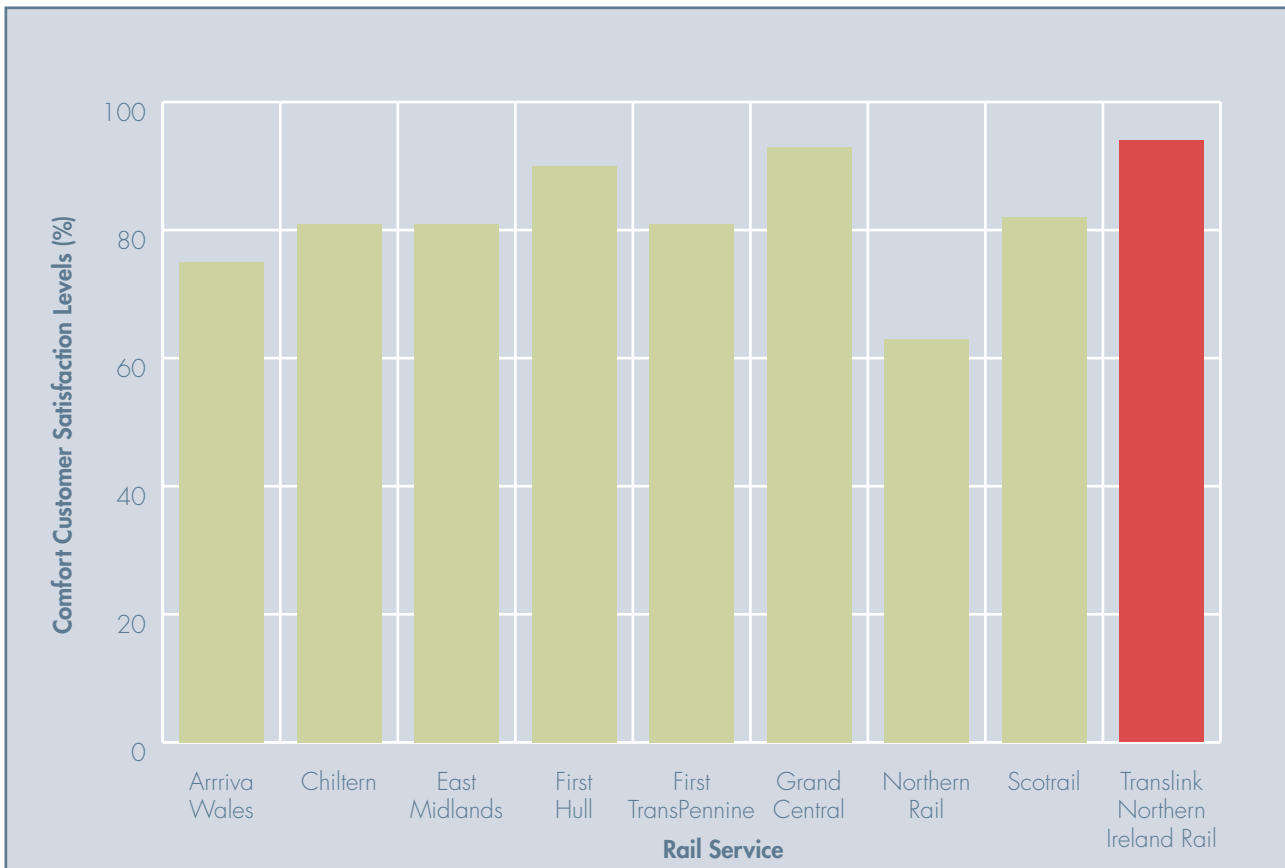


Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1st Update 2014

This shows the percentage of customers who are satisfied with the cleanliness of the rail service in their area. Results are given for Northern Ireland Rail and 8 other United Kingdom rail services. The highest levels of satisfaction were recorded by passengers of First Hull (93%) while the lowest were recorded by Northern Rail (65%) passengers. 92% of Northern Ireland Rail passengers were satisfied with the cleanliness of the rail service, the second highest percentage.

## Appendix 9: Rail - Quality of Service Levels Benchmarked (paragraph 5.46)

### Rail Customer Satisfaction Levels with Comfort for Northern Ireland Rail and 8 other United Kingdom Rail Services

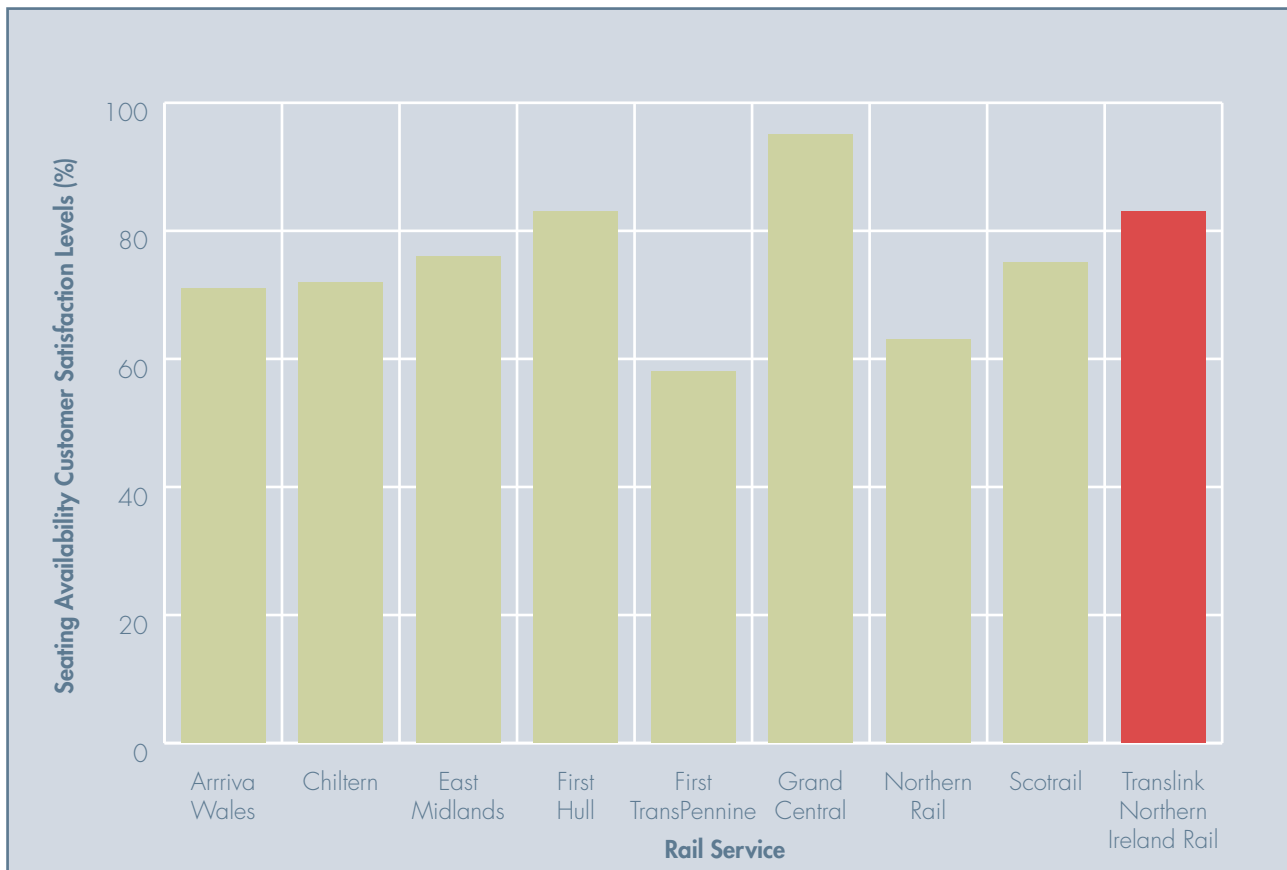


Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1<sup>st</sup> Update 2014

This indicates customer satisfaction with the comfort of the rail service in their area. Results are illustrated for Northern Ireland Rail and 8 other United Kingdom rail services. 94% of Northern Ireland Rail passengers were satisfied with the comfort of the rail service, the highest percentage. The second highest levels of satisfaction were recorded by passengers of Grand Central (93%) while the lowest were recorded by Northern Rail (63%) passengers.



### Rail Customer Satisfaction Levels with Seating Availability for Northern Ireland Rail and 8 other United Kingdom Rail Services

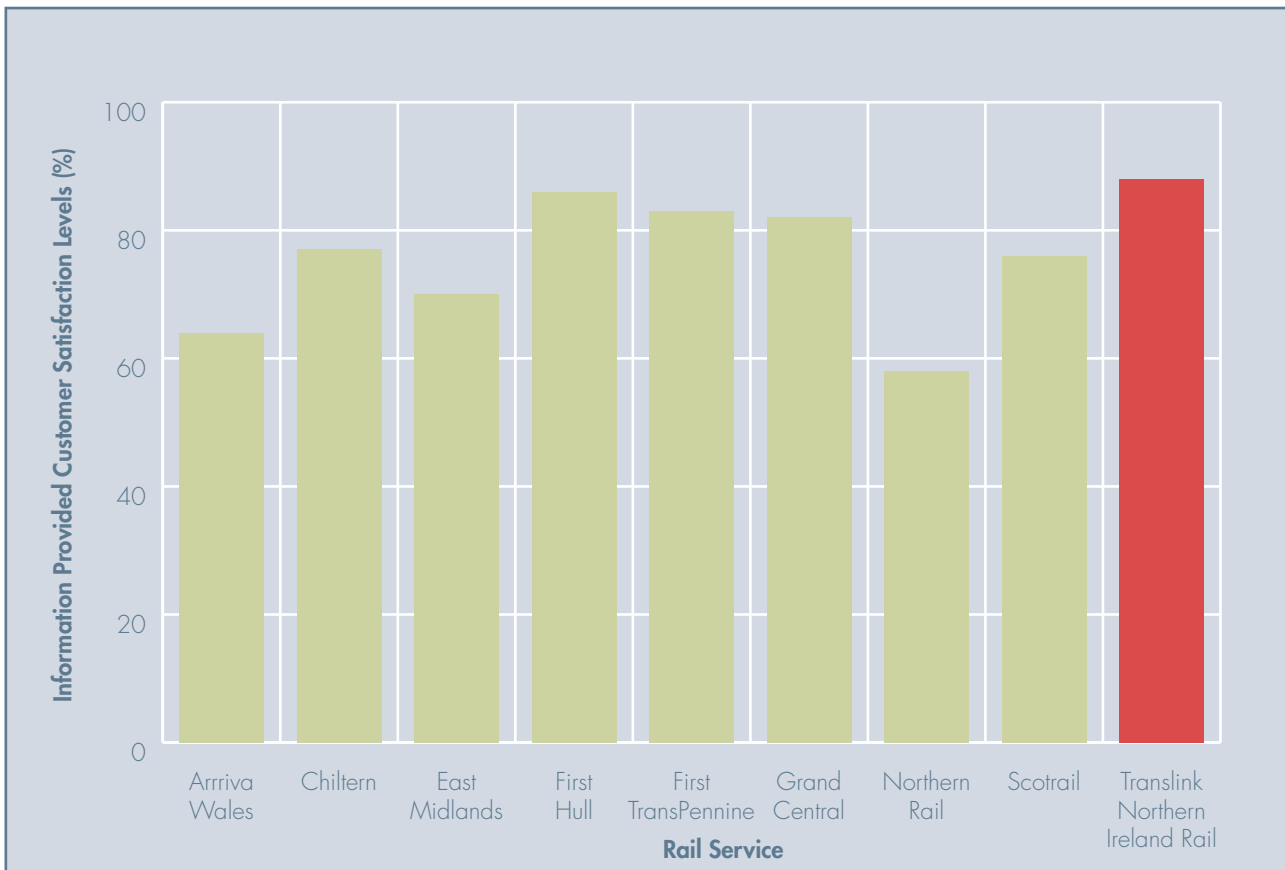


Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1st Update 2014

This illustrates the percentage of customers who are satisfied with seating availability and standing room on the rail service in their area. Results are illustrated for Northern Ireland Rail and 8 other United Kingdom rail services. The highest levels of satisfaction were recorded by passengers of Grand Central (95%) while the lowest were recorded by First TransPennine (58%) passengers. 83% of Northern Ireland Rail passengers were satisfied with the seating availability and standing room of the rail service, the third highest performance.

## Appendix 9: Rail - Quality of Service Levels Benchmarked (paragraph 5.46)

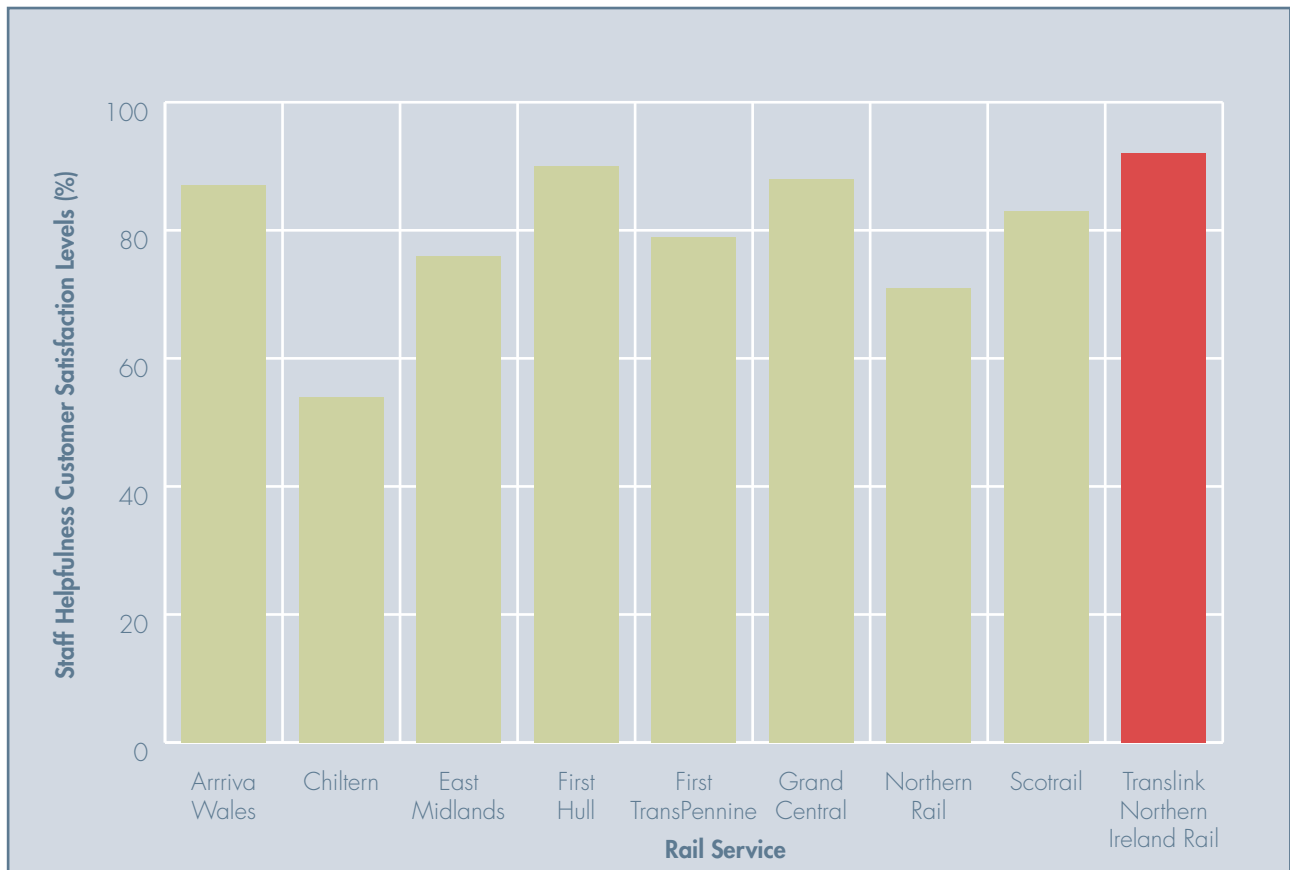
### Rail Customer Satisfaction Levels with Information Provided for Northern Ireland Rail and 8 other United Kingdom Rail Services



Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1st Update 2014

This illustrates customer satisfaction with the information provided on the rail service in their area. Results are illustrated for Northern Ireland Rail and 8 other United Kingdom rail services. 88% of Northern Ireland Rail passengers were satisfied with the information provided on the rail service, the best performance of any of the operators surveyed. The lowest levels of satisfaction were recorded by passengers of Northern Rail (58%).

### Rail Customer Satisfaction Levels with Staff Helpfulness for Northern Ireland Rail and 8 other United Kingdom Rail Services

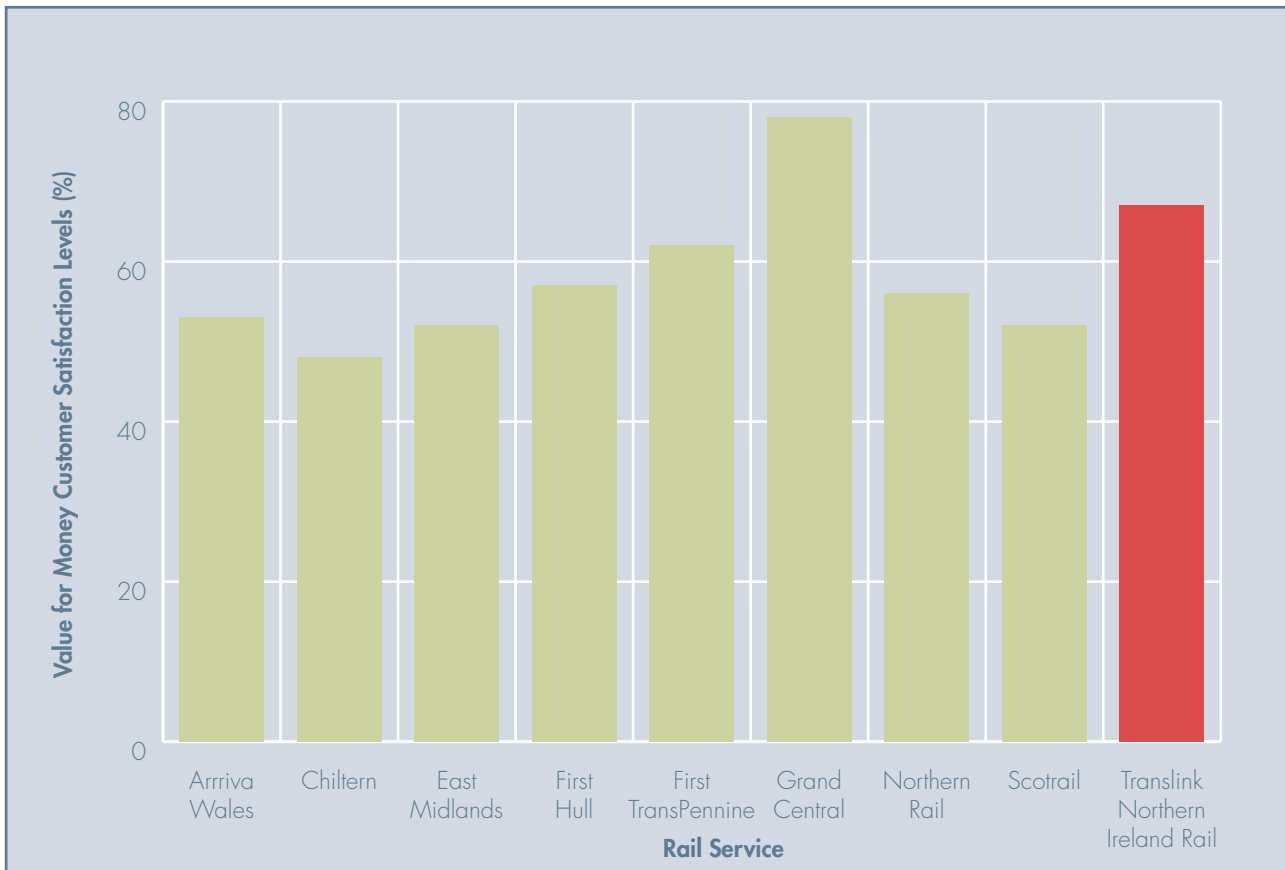


Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1st Update 2014

This illustrates the percentage of customers who are satisfied with the helpfulness of staff on the rail service in their area. Results are provided for Northern Ireland Rail and 8 other United Kingdom rail services. 92% of Northern Ireland Rail passengers were satisfied with the helpfulness of the staff, the highest percentage. The second highest levels of satisfaction were recorded by passengers of First Hull (90) while the lowest were recorded by Chiltern (54) passengers.

## Appendix 9: Rail - Quality of Service Levels Benchmarked (paragraph 5.46)

### Rail Customer Satisfaction Levels with Value for Money for Northern Ireland Rail and 8 other United Kingdom Rail Services



Source: Passenger Focus, National Rail Survey Autumn 2013 Main Report; Translink Independent Monitoring Update 1st Update 2014

This indicates the percentage of customers who are satisfied with the value for money offered by the rail service in their area. Results are given for Northern Ireland Rail and 8 other United Kingdom rail services. The highest levels of satisfaction were recorded by passengers of Grand Central (78%) while the lowest were recorded by Chiltern (48%) passengers. 67% of Northern Ireland Rail passengers were satisfied with the value for money of the service, the second highest percentage.

# NIAO Reports 2014-2015

Title	Date Published
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