Public Document Pack

SOUTH YORKSHIRE
SYMCA

MAYORAL COMBINED AUTHORITY

Wednesday, 6 March 2024

To: Members of the Overview and Scrutiny Committee and Appropriate Officers

NOTICE OF MEETING

You are hereby summoned to a meeting of the South Yorkshire Mayoral Combined Authority to be held at **South Yorkshire MCA, 11 Broad Street West, Sheffield, S1 2BQ**, on: **Thursday, 14 March 2024** at **2.00 pm** for the purpose of transacting the business set out in the agenda.

Martin Swales

Martin Swales
Chief Executive and Head of Paid Service

Webcasting Notice

This meeting will be streamed live or subsequent broadcast via the Mayoral Combined Authority's website.

You should be aware that the Mayoral Combined Authority is a Data Controller under the Data Protection Act 2018. Data collected during this webcast will be retained in accordance with the Mayoral Combined Authority's published policy.

By entering the meeting room, you are consenting to be filmed and to the possible use of those images and sound recordings for webcasting and/or training purposes.

Member Distribution

Councillor Tim Huggan (Chair)	Sheffield City Council
Councillor Joshua Bacon	Rotherham MBC
Councillor Jeff Ennis OBE	Barnsley MBC
Councillor Douglas Johnson	Sheffield City Council
Councillor Jake Kearsley	City of Doncaster Council
Councillor Jane Kidd	City of Doncaster Council
Councillor Hannah Kitching	Barnsley MBC
Councillor Zahira Naz	Sheffield City Council
Councillor Sioned-Mair Richards	Sheffield City Council
Councillor Ken Wyatt	Rotherham MBC

Overview and Scrutiny Committee

Thursday, 14 March 2024 at 2.00 pm

Venue: South Yorkshire MCA, 11 Broad Street West, Sheffield, S1 2BQ

SOUTH YORKSHIRE
SYMCA
MAYORAL COMBINED AUTHORITY

Agenda

Agenda Ref No	Subject	Lead	Page
1.	Welcome and Apologies	Chair	
2.	Urgent Items/Announcements	Chair	
3.	Items to be Considered in the Absence of Public and Press	Chair	
4.	Declarations of Interest by any Members	Chair	
5.	Reports from and Questions by Members	Chair	
6.	Questions from Members of the Public to the MCA	Chair	
7.	Minutes of the Previous Meeting Held on 14th December and Action Log	Chair	5 - 20
8.	Mayoral Scrutiny	Mayor Oliver Coppard	21 - 22
9.	Review of latest Forward Plan of Key Decisions	Chair	23 - 36
10.	Review of Committee Work Programme	Chair	37 - 40
11.	Update on South Yorkshire Airport City	Gareth Sutton	Verbal
12.	Bus Franchising Update	Pat Beijer	Verbal
13.	£2 Bus Fare Impact Evaluation	Tim Taylor	41 - 94
14.	Local Nature Recovery Strategy	Clare Monaghan, Laurie Heykoop	95 - 104
15.	Safe Place to Sleep Programme	Andy Gates	105 - 114
16.	Committee End of Year Report	Chair	115 - 126

Date of next meeting: Thursday, 25 July 2024 at 2.00 pm

At: South Yorkshire MCA, 11 Broad Street West, Sheffield, S1 2BQ

This page is intentionally left blank

OVERVIEW AND SCRUTINY COMMITTEE

MINUTES OF THE MEETING HELD ON:

THURSDAY, 14 DECEMBER 2023 AT 2.00 PM

SOUTH YORKSHIRE MCA, 11 BROAD STREET WEST, SHEFFIELD, S1 2BQ

Present:

Councillor Tim Huggan (Chair)	Sheffield City Council
Councillor Joshua Bacon	Rotherham MBC
Councillor Jeff Ennis OBE	Barnsley MBC
Councillor Hannah Kitching	Barnsley MBC
Councillor Sioned-Mair Richards	Sheffield City Council
Councillor Christine Gilligan Kubo (Reserve)	Sheffield City Council

In Attendance:

Clare Monaghan	Executive Director of Policy and Strategic Development	SYMCA Executive Team
Pat Beijer	Executive Director of Transport (Acting)	SYMCA Executive Team
Adam Bottomley Nicola Marshall	Senior Lawyer	SYMCA Executive Team
Fliss Miller	Director of Skills	SYMCA Executive Team
Ed Clancy		South Yorkshire Mayoral Combined Authority
Mayor Oliver Coppard		South Yorkshire Mayoral Combined Authority

Apologies:

Councillor Douglas Johnson	Sheffield City Council
Councillor Jake Kearsley	City of Doncaster Council
Councillor Jane Kidd	City of Doncaster Council
Councillor Zahira Naz	Sheffield City Council
Councillor Ken Wyatt	Rotherham MBC

103   **Welcome and Apologies**

The Chair welcomed members to the meeting, and apologies were noted as above.

The meeting was not quorate but members proceeded with an informal discussion.

104   Urgent Items/Announcements

None.

105   Items to be Considered in the Absence of Public and Press

None.

106   Declarations of Interest by any Members

None.

107   Reports from and Questions by Members

None.

108   Questions from Members of the Public

None.

109   Minutes of the Previous Meeting Held on 21 September

The Minutes of the meeting held on 21st September 2023 were agreed as a true and accurate record.

110   Matters Arising/ Review of Action Log

Updates to the Action Log were noted:
- The matter regarding the 10/10a bus route was now resolved,
- Timeline for tram development would be addressed in the substantive Tram Mobilisation item on the agenda,
- On the decision of whether to infill the Woodborne Road Tunnel it was noted that a follow up inspection had been requested from Sheffield City Council, and that it was expected a contractor would be appointed before the end of this financial year.

111   Review of latest Forward Plan of Key Decisions

A discussion was held on the proposed Safe Place to Sleep Programme. This a programme seeking to address the number of children in the region without their own bed to sleep in and would look to provide basic provisions to the most in need families. The Committee welcomed this initiative and noted examples in Scotland and Scandanavia of provisions made available for new born babies, as well as previous grants made by the South Yorkshire Fire Authority to Barnsley hospital.

A question was raised around the Transport Levy and it was noted that Local Authorities had agreed to a year-on-year increase to the fund, which would

receive formal approval as part of the MCA Budget process.

112   **Committee Work Plan**

ACTION: Scrutiny Officer - The Committee asked that the following items be added to the Workplan:
- The Mayor's Safe Place to Sleep programme,
- Local Nature Recovery Strategy.

A question was raised about the Local Nature Recovery Strategy. A response was given that the MCA was currently appointing members to an Advisory Board, and that the Strategy could be developed from February.

113   **Police and Crime Commissioner Powers**

An update was provided on the transfer of Police and Crime Commissioner (PCC) powers by the Executive Director for Policy & Strategic Development, noting that:
- The Order would be laid in Parliament the following week to affect the transfer of Police and Crime Commissioner powers to South Yorkshire's Mayor,
- It was expected that the Constituent Councils would provide their consent to the Order by the end of the week,
- A formal Programme Board had been established to manage the transfer of functions,
- Seven working groups had been established to deliver the transfer of day-to-day functions.

A question was asked on the possible appointment of a Deputy Mayor for Police and Crime, and what their role would be. A response was given that this is a decision which the elected Mayor would take after taking up Office, but that having a Deputy Mayor is not mandatory. The appointment of this role would also be subject to consultation with the Police and Crime Panel.

A question was raised around use of PCC funding and any possible changes to back-office functions. A response was given that PCC funding is ringfenced for that purpose. All PCC staff would be TUPE'd (Transfer of Undertakings Protection of Employment rights) to the MCA, and that there were no plans to change their staffing structures or functions.

114   **Skills Update**

An update was provided on the MCA's Skills agenda by the Director for Skills, noting that:
- The Combined Authority has an annual skills revenue budget of approximately £55 million,
- South Yorkshire has a post-industrial economy, with productivity challenges across sectors.

It was asked whether the MCA stipulates which industries skills funding is targeted at. A response was given that this is partially decided by providers but that the MCA negotiates delivery plans with providers and can procure for

specific provision as needed.

A question was asked regarding community education, and how to involve learners who are less driven to engage in adult learning. It was responded that that Local Authority partners are commissioned to deliver programmes, who – where appropriate - subcontract to community organisations who can distribute funding in the most appropriate way for each place.

It was asked how the amount of funding for skills in South Yorkshire compares with the national average. A response was given that there is a mix of devolved, delegated, funding which was bid for by the MCA and use of the MCA's gainshare allocation, but that South Yorkshire was mid-table in terms of funding per resident when compared with nationally with the devolved adult education budget.

It was noted that year-on-year underspend on skills provision was declining, and that the MCA is working to ensure that funds go as far as possible without any duplication of provision.

A question was asked about Multiply funding, and whether the late award of this had had an impact on Value for Money across the programme. A response was given that this is a 3-year programme but that in the first year there had been a significant underspend due to the late award. However, the programme was now in year 2 and spend forecasting had greatly improved.

It was added that the short-term nature of all skills programmes is a challenge for mobilising schemes, which the MCA continues to raise with Government. It was hoped that with the development of an MCA Skills Strategy there would be a clearer pipeline of schemes ready to deliver as funding is made available.

115 **Active Travel**

A verbal update was provided on Active Travel by Ed Clancy, Active Travel Commissioner, and the Active Travel Programme Director.

It was noted that:
- Increasing walking, wheeling and cycling in South Yorkshire is a priority for the MCA as it improves residents' health, reduces carbon emissions and creates nicer places for people to live,
- Co-production with communities was important to addressing barriers to active travel,
- There was good practice across the region with much delivery on track, and that a strong relationship had been built with Active Travel England,
- Improvement was needed in the development of a refreshed strategic plan and a pipeline of schemes.

An overview was given on the development of a new strategic plan which would form a part of the Local Transport Plan. It would focus on:
- Integrating types of journeys, such as walking and public transport,
- Improved infrastructure, and supporting residents to use new infrastructure,
- A piece of research which had been commissioned to create clear

shared plans for active travel with communities,

- Working with key partners to engage lesser heard communities in this work.

An overview was given of £160m of Active Travel schemes on the pipeline to date, and in particular the Bennetthorpe Active Travel Scheme was highlighted, which had seen a doubling of cyclists using the route.

ACTION: Active Travel Programme Director to circulate slides used to members.

A concern was raised about use of off-road bikes and quad bikes in communities, and it was asked how active travel plans could work to address these issues. A response was given that the MCA was keen to involve experts in the delivery of active travel ambitions, and that barriers to use of off-road routes need to be looked at to ensure appropriate use of all routes. It was noted that the growth of e-scooters presented a challenge, but that the MCA would need to be ready to foster responsible use in future.

It was added that there are many community groups in the region supporting young people and adults to engage in leisure walking, running and biking.

It was asked how much involvement the MCA engages with planning applications to promote cycling. A response was given that new powers had been given to Combined Authorities to allow greater collaboration and input into the planning process for things like this, and that the MCA was committed to doing so.

A question was raised around engagement from Local Authority partners; it was noted that engagement had been very positive, and that the strategic plan would acknowledge that different approaches would be needed across the region to create infrastructure which works for all.

A question was raised around integration of methods of travel such as cycling and the Tram. The Active Travel Commissioner responded that there are many examples of schemes which may not work in South Yorkshire and so careful consideration would be needed for the development of any new scheme.

116 **Tram Mobilisation**

An update on Tram Mobilisation was presented, noting that:
- Governance arrangements had been established for the operating organisation to be in place from the first day of operation,
- Oversight of risk would sit with the MCA Audit Standards and Risk Committee,
- The incumbent pension provider would remain in place, and the MCA was currently in the process of acquiring audit services for the operating company.
- A year-one Business Plan had been developed to mobilise systems and processes for new operations and to ensure regulatory and legal compliance,
- A significant asset renewal programme would also be undertaken within

this period and would be addressed within the business plan.

A question was raised around safety for road users around tram tracks, and the renewal of and maintenance of tracks. A response was given that the operating company would continue to be responsible for maintenance, and that this is divided between them and Highways England.

ACTION: Executive Director Public Transport to look into issue raised on road maintenance and concrete repairs on the tram tracks in the Hillsborough ward.

ACTION: Executive Director Public Transport to look up how much road surface the MCA is responsible for maintaining around tram tracks.

117   **Mayoral Scrutiny**

The Chair welcomed the Mayor to the meeting and invited him to update the Committee.

The Mayor noted some recent events and significant pieces of work which he had undertaken since the previous Committee meeting:
- Over 20 public bus meetings had been held,
- He had attended Labour and Conservative Party Conferences,
- He had attended COP28 as part of a City Region Mayors' delegation,
- He had visited St Louis to speak about the region's advanced manufacturing capabilities and to build greater links with South Yorkshire,
- The Minister of State for Transport had visited South Yorkshire following Network North announcements.

Cllr Ennis highlighted the North South divide in England, and disproportionate funding across northern regions, and asked about the Mayor's ambitions for greater devolution. The Mayor responded that the roll out of devolution had been piecemeal, but that he continues to lobby government for greater devolution in South Yorkshire, including for business rate retention and a 'single pot' settlement. He added that the Northern Mayors have lobbied together and continue to support each other on several issues such as ticket office closures.

Cllr Kitching asked what the next steps in in Bus Franchising would be. The Mayor responded that if agreed to by the MCA Board, the MCA's assessment of Franchising would be subject to an external audit which he hoped would happen early next year. This would be followed by a public consultation and a final decision on Franchising by the MCA Board.

ACTION: Scrutiny Officer to add Bus Franchising to the Committee Workplan.

Cllr Richards asked about the transfer of Police and Crime Commissioner powers, and how the role of Deputy Mayor might work. The Mayor noted that none of this process had been confirmed, and that this would be a decision taken by whoever is elected Mayor. He noted that in other regions an open recruitment process had been conducted for the role, but that the Mayor would

be ultimately responsible for any work as the Police and Crime Commissioner.

Cllr Bacon asked about the purpose of Mayor's public bus meetings. The Mayor responded that the deregulation of buses in the 1980s had negatively impacted the whole system and had instigated a decline in funding for places like South Yorkshire.

Cllr Bacon also challenged whether City Region Sustainable Transport Settlement (CRSTS) funding was being used equally across the region. The Mayor responded that the Government determines much of how CRSTS funding is spent.

The Mayor added that he is committed to making sure all communities in the region receive better transport links and infrastructure, and that the first round of CRSTS was distributed on a per capita basis, but that not enough funding had been allocated to be spent everywhere in South Yorkshire. He noted that he continues to lobby government to commit to greater transport funding for the region, including the release of funding previously allocated to a Doncaster Sheffield Airport rail link.

Referencing a recent media story, Cllr Huggan asked whether the Mayor intended to bid for the Commonwealth Games to take place in South Yorkshire. The Mayor responded that he would like to do this if Government was also willing to invest in it.

Cllr Huggan also asked whether there are any bus services paid for by the MCA which operators have been failing to run. The Mayor responded that he hoped this would not be the case, but that he would seek to find out any instances. **ACTION: Mayor Oliver Coppard** to find information on any tendered services not being delivered by operators.

Cllr Huggan also asked about future expansion of the Tram network. The Mayor noted that expansions of the tram for example, to Chesterfield or new park and rides, would be a long way in the future but that the MCA is working towards being in a better position to roll out more aspirational plans for the tram network.

Cllr Ennis expressed disappointment that not all MPs in the region were lobbying Government for greater funding for South Yorkshire and stated that he would be writing to MPs to call on them to support the Mayor to get a better deal for the region.

I, the undersigned, confirm that this is a true and accurate record of the meeting.

Signed   ....

Name   ....

Position   ....

Date   ....

This page is intentionally left blank

Overview and Scrutiny Committee

Action Log from 19 January 2023

SOUTH YORKSHIRE
SYMCA
MAYORAL
COMBINED
AUTHORITY

Open and Recently Completed Actions

Meeting Date	Minute No	Action	Action Owner	Update	Status
21/09/23	99 (i)	**Review of latest Forward Plan of Key Decisions** Executive Director of Transport to bring a report to the Committee for consideration once a decision was made on whether to infill or restore the tunnel under Woodbourne Road and Parkway Avenue.	Pat Beijer	Update was given at 14/12/23 meeting that: "it was noted that a follow up inspection had been requested from Sheffield City Council, and that it was expected a contractor would be appointed before the end of this financial year." Decision is now due to be taken in April 2024.	Ongoing
14/12/2023	116	**Tram Mobilisation** A question was raised around safety for road users around tram tracks, and the renewal of and maintenance of tracks. A response was given that the operating company would continue to be responsible for maintenance, and that this is divided between them and Highways England. **ACTION: Executive Director Public Transport** to look into issue raised on road	Pat Beijer	Pat Beijer to provide a verbal update to the 14 March meeting.	Ongoing

Meeting Date	Minute No	Action	Action Owner	Update	Status
		maintenance and concrete repairs on the tram tracks in the Hillsborough ward.			
Informal Committee briefing 06/02	N/A	**Community Transport** 1. Look in to undertaking consultation with users of community transport, extend to those who do not use it to understand why. Understanding perceptions that this is only a service for the elderly and disabled. 2. Looking in to why demand is low for CT and how it can be addressed 3. It would be useful to see any passenger surveys available to gauge feedback from users of the services, whether through SYMCA, the operators or voluntary sector groups. 4. Look in to compiling 1 pager of information on CT for circulation by Councillors 5. Circulate information on hire of CT Minibuses 6. prepare and share a marketing/comms plan with the CT operators as part of their business planning activity	Tim Taylor	1. We have requested that some form of user (and non-user) engagement be included in the Community Transport Business Plan for 2024/25 (first draft of which was shared with SYMCA on 05 February). This is still in development and is hoped to be approved by SYMCA in March 2024. 2. Linked to the point above, and also requested to be included in the Community Transport Business Plan, we have requested a more detailed marketing and communications plan for 2024/25 to demonstrate how CT operators plan to engage with potential passengers and increase patronage. 3. We will be happy to share outputs of the user engagement outlined in point 1 when available	Ongoing

Meeting Date	Minute No	Action	Action Owner	Update	Status
				(subject to approval to do so by the CT operators). 4. A one page summary should be an output of the marketing and communications plan. 5. I will look to gather private hire details and share with OSC members when available. 6. As described in point 2 above, we have asked that a marketing and communications plan be included in the draft CT Business Plan for MCA to approve.	

Recently Completed Actions

Meeting Date	Minute No	Action	Action Owner	Update	Status
14/12/2023	112	**Committee Work plan** **ACTION: Scrutiny Officer -** The Committee asked that the following items be added to the Workplan: • The Mayor's Safe Place to Sleep programme, • Local Nature Recovery Strategy.	Sarah Pugh		Completed.

Meeting Date	Minute No	Action	Action Owner	Update	Status
	115	**Active Travel** **ACTION: Active Travel Programme Director** to circulate slides used to members.	Nicola Marshall		Completed.
	116	**Tram Mobilisation** **ACTION: Executive Director Public Transport** to look up how much road surface the MCA is responsible for maintaining around tram tracks.	Pat Beijer	Executive Director of Transport Pat Beijer has passed on the following: "Supertram Maintenance Area" means the Highway covered by the 18-inch rule (as the same is defined in section 28 of the Tramways Act 1870) together with the areas hatched red on the Supertram Maintenance GIS layer. The road maintenance area for tram is defined as 18" either side of the rail embedded within the road, and the bit in between the rails.	Completed.
	117	**Mayoral Scrutiny** **ACTION: Scrutiny Officer** to add Bus Franchising to the Committee Workplan.	Sarah Pugh		Completed.
14/12/2023	117	**Mayoral Scrutiny**	Mayor Oliver Coppard	Update provided to the committee via email on 25/01.	Completed.

Meeting Date	Minute No	Action	Action Owner	Update	Status
		Cllr Huggan also asked whether there are any bus services paid for by the MCA which operators have been failing to run. The Mayor responded that he hoped this would not be the case, but that he would seek to find out any instances. **ACTION: Mayor Oliver Coppard** to find information on any tendered services not being delivered by operators.		Appended to March Committee papers.	
19/01/23	57	**South Yorkshire Renewal Fund** **ACTION:** The Corporate Director Policy to attend a future meeting to discuss how success will be measured using the Outcomes Framework and key metrics.	Felix Kumi-Ampofo	Monitoring of corporate metrics is a key theme addressed in the newly published Scrutiny Protocol, and actions around this ambition have been committed to in the Chair's Annual Report. to be addressed in end of year committee report, due at March Committee meeting.	Completed.
19/01/23	57	**South Yorkshire Renewal Fund** **ACTION:** The Executive Director of Finance & Investment to provide the Committee with regular updates on the South Yorkshire Renewal Fund and the projects coming forward	Gareth Sutton	As part of delivery of Committee recommendations and the Scrutiny Protocol, committee induction will include updates on South Yorkshire Renewal Fund, and regular updates on corporate metrics.	Completed.

This page is intentionally left blank

Matters Arising: Update on Tendered Services

On the action regarding non-running of tendered services, we have done some analysis of the last four periods by operator as to the percentage of services we pay for that they did not operate.

As you will see, there are no major issues with any operators except for TM Travel, who have been experiencing significant operational issues since the latter part of last year. Our current target is 1.0%.

Operator	%	%	%	%
	Period 7	Period 8	Period 9	Period 10
TM Travel	20.6%	14.6%	11.9%	11.5%
First	1.3%	1.6%	1.8%	0.9%
Arriva	0.5%	0.2%	0.8%	1.6%
Stagecoach	0.8%	1.0%	1.0%	0.6%
East Midlands	0.4%	0.0%	0.3%	0.8%
Cawthornes	0.0%	0.0%	0.0%	0.0%
Coopers	0.0%	0.0%	0.0%	0.0%
Goodfellows	0.0%	0.0%	0.0%	0.0%
Globe	0.0%	0.0%	0.0%	0.0%
Heatons	0.0%	0.0%	0.0%	0.0%
Keats	0.0%	0.0%	0.0%	0.0%
LL Travel	0.0%	0.0%	0.0%	0.0%
South Pennine	0.0%	0.0%	0.0%	0.0%
Wilfreda	0.0%	0.0%	0.0%	0.0%
Total	3.5%	2.6%	2.5%	2.2%
Excluding TM Travel	0.7%	0.8%	0.9%	0.6%

We have been well aware of the issues with TM Travel and started to apply the next tier of contractual penalties to them from Period 8 onwards (over and above the ordinary deductions for lost mileage). Their issues are improving slowly and the MCA met with their Managing Director and management team on Monday this week to review their rectification plans. This may see some more immediate improvement where the can subcontract some services to another operator (which we support) but beyond that we are expecting them to work towards fixing their operational issues (and to reinstate dropped Saturday services) no later than the 07 April service change date.

This page is intentionally left blank

Mayoral Scrutiny: SYMCA Overview and Scrutiny Committee (14th March 2024)

The Overview and Scrutiny Committee Chair has asked that we provide a short summary of the Mayor's focus since December 2023:

- **Transfer of control of Supertram:** In January, a business plan was for approved for the SYMCA-owned South Yorkshire Future Trams Ltd, which will operate Supertram from 22nd March 2024. The Mayor and Combined Authority have been working hard to ensure a smooth transition.

- **Reopening Doncaster Sheffield Airport:** The Mayor and the February MCA Board agreed to an Outline Business Case to reopen Doncaster Sheffield Airport, as part of a wider South Yorkshire Airport City development including the Gateway East site. At the same time, the Mayor has been engaging with the Department for Transport to secure additional funding to support DSA.

- **Bus franchising assessment process:** The Mayor has been working alongside officers and other MCA Board members to assess options for how we operate our bus system. We have provided notice of a key decision for our 12th March MCA Board to review the bus franchising assessment.

- **Bus funding and changes:** The Mayor launched his joint campaign for fair funding with the Sheffield Star. Information from last autumn's campaign of public bus meetings has been used to negotiate route and timetable changes with operators, to take effect from April 2024.

- **Active travel:** The Mayor launched his "Year of Active Travel", including weekly Park Runs across South Yorkshire and regular visits to schools across the region to encourage walking, running and cycling. He met with Active Travel England Commissioner Chris Boardman and ATE officials to discuss plans to improve active travel across the region.

- **Economic growth:** In February the MCA Board approved the design proposals of our Investment Zone, which are now with DHLUC for sign-off. We also signed Memoranda of Understanding with Aviva Capital Partners and South Yorkshire Pension Fund, as well as a Strategic Place Partnership with Homes England. In our March MCA Board, the MCA will consider a Plan for Growth and a Skills Strategy.

- **Transfer of Police and Crime Commission Functions:** From late December to late January, the Home Office ran a consultation on the transfer of the OPCC into the office of the Mayor. An order was subsequently laid in parliament in early February to enable the transfer. Parliament has until late March. If it is approved, there will be a South Yorkshire Mayoral election on 2 May with the pre-election period commencing 26 March.

- **Further devolution:** The Mayor, alongside other leaders on the MCA Board, wrote to the Levelling Up Secretary formally requesting "level 4" devolution, which would enable additional partnerships (like the Homes England Strategic Place Partnership) and spending flexibilities in regeneration and transport.

- **Governance changes:** A Mayor's Economic Advisory Council was appointed in January made up of national and international leaders who will help shape the strategic economic vision in South Yorkshire. The Mayor hosted the first meeting of MEAC with visits to Barnsley, Goldthorpe and the AWRC.

This page is intentionally left blank

SOUTH YORKSHIRE
SY MCA
MAYORAL COMBINED AUTHORITY

Overview and Scrutiny Committee

Tuesday, 14 March 2023

Forward Plan of Key Decisions

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Governance
Is this a Key Decision?	No
Has it been included on the Forward Plan of Key Decisions?	Not a Key Decision

Director Approving Submission of the Report:
Steve Davenport, Director of Legal and Governance

Report Author(s):
Sarah Pugh, Democratic Services Officer
Sarah.pugh@southyorkshire-ca.gov.uk

Summary

The forward plan has been prepared in accordance with The Combined Authorities (Overview and Scrutiny Committees Access to Information and Audit Committees) Order 2017 ('the Order') and will be published at least 28 days before the key decision is to be made.

The 2017 Order defines a key decision as a decision, which in the view of the Combined Authority's Overview and Scrutiny Committee is likely:

(i) To result in the Combined Authority or the Mayor incurring revenue expenditure or savings in excess of £0.25M or capital expenditure or savings in excess of £1m, having regard to the Combined Authority's budget for the service or function to which the decision relates; or

(ii) To be significant in terms of its effects on persons living or working in an area comprising two or more wards or electoral divisions in the area of the Combined Authority.

Recommendation(s)

That the Overview & Scrutiny Committee:
1. Note the attached latest Forward Plan of SYMCA Key Decisions,
2. Recommend any areas for further scrutiny.

List of Appendices Included:

A Latest Forward Plan of Key Decisions

Forward plan of Key Decisions to be made:
Forward Plan of Key Decisions (1 January 2024 - 31 December 2024)

Date Published: 01 March 2024

Decision to be made:	What is the decision?	Planned Decision Date	Decision maker's name (or name of the board) & title:	Lead Officer name and contact details	Documentation for consideration & other relevant documents	Prohibitions Restrictions Exemptions
UK Shared Prosperity Fund Applications 2024/25	Approval of award(s) UK Shared Prosperity Fund to deliver schemes for 2024/25, up to the following amounts: **Communities and Place** Rotherham Metropolitan Borough Council: £1,261,281 Barnsley Metropolitan Borough Council: £1,297,624 Sheffield City Council: £2,773,124 City of Doncaster Council: £1,595,567 **Local Business Support** Rotherham Metropolitan Borough Council: £1,801,840 Barnsley Metropolitan Borough Council: £1,853,760 Sheffield City Council: £3,961,630 City of Doncaster Council: £2,279,395 **People and Skills** Rotherham Metropolitan Borough Council: £1,483,010 Barnsley Metropolitan Borough Council: £1,483,010 Sheffield City Council: £3,169,308 City of Doncaster Council: £1,823,518	4/03/24	Section 73 Officer	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@ southyorksh ire- ca.gov.uk	Delegated Approval Reports and Records of Officer Decision Forms.	Not exempt

Award of Sheffield City centre connect service	Award of contract to operate the city centre connect service(s).	6/03/24	Executive Director of Transport	Pat Beijer Executive Director of Transport (Acting) pat.beijer@southyorkshire-ca.gov.uk	Delegated Authority Report and record of Officer Decision Form	Part exempt Information relating to the financial or business affairs of any particular person (including the authority holding that information)
South Yorkshire Plan for Growth	Approval to adopt a Plan for Growth.	12/03/24	Mayoral Combined Authority Board	Joseph Quinn Director of Growth & Sector Development joseph.quinn@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt
Skills Strategy for South Yorkshire	Approval to adopt draft Skills Strategy.	12/03/24	Mayoral Combined Authority Board	Fliss Miller Director of Skills fliss.miller@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt

AEB allocation for procured provision	Approval to allocate £10.00m of AEB funding for procured provision, with contract award decisions to be delegated to the Corporate Director for Growth, Business and Skills delivery of AEB in 2024/25 academic year.	12/03/24	Mayoral Combined Authority Board	Fliss Miller Director of Skills fliss.miller@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt
Free Courses for Jobs allocation for procured provision	Approval to allocate £2.20m of Free Courses for Jobs funding for procured provision, with contract award decisions to be delegated to the Corporate Director for Growth, Business and Skills delivery of AEB in 2024/25 academic year.	12/03/24	Mayoral Combined Authority Board	Fliss Miller Director of Skills fliss.miller@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt
South Yorkshire Bus Reform	Consider the outcome of the assessment of the proposed franchising scheme and next steps.	12/03/24	Mayoral Combined Authority Board	Pat Beijer Executive Director of Transport (Acting) pat.beijer@southyorkshire-ca.gov.uk	MCA Board Report.	Part exempt Information relating to the financial or business affairs of any particular person (including the authority holding that information)

Brownfield Housing Fund - Laurel Works	In Principle approval at Outline Business Case of up to £4.34m to support the development of 268 build to rent homes in Sheffield.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Papers.	Not exempt
Active Travel Fund 4 (BJC) - North Bridge Connector	Approval of £1.44 million grant funding to deliver Active Travel North Bridge Connector Scheme.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report	Not exempt
Transforming Cities Fund (FBC) Southwest Corridors Phase 1	Approval of £3.3 million grant to deliver bus priority improvements on Southwest Corridor.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt

Safe Place to Sleep Programme	Commit £2m for a pilot programme of work centred around the Safe Space to Sleep proposition be developed with four test areas in South Yorkshire. These pilot areas will be established to better understand how different ways of working with communities can build better health and education outcomes for young people – whilst also reducing costs to the public sector through early prevention methods.	12/03/24	Mayoral Combined Authority Board	Andy Gates Assistant Director - External Affairs andrew.gates@southyorkshire-ca.gov.uk	MCA Board Paper	Not exempt
Gainshare - Harmony Works	In Principle approval at Outline Business Case of up to £2m grant to support capital works on a city centre building to be redeveloped as a music hub.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt
Gainshare - Castlegate	In Principle approval at Outline Business Case of up to £5m grant funding to support the redevelopment of the Castle Market site as event and public space.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt

Brownfield Housing Fund - The Hive	In Principle approval at Outline Business Case of up to £1.6m to support the delivery of a 100 unit co-living/co-working scheme in Sheffield.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt
Brownfield Housing Fund - Waverley 4C (OBC)	In principle approval at Outlined Business Case of up to £2.017m grant to unlock the delivery of 87 homes at the Waverley site in Rotherham.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt
Brownfield Housing Fund - Waverley 4D (OBC)	In principle approval at Outlined Business Case of up to £2.96m grant to unlock the delivery of 117 homes at the Waverley site in Rotherham.	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA BOard Report	Not exempt
Gainshare - Rotherham Childrens Capital of Culture (BJC)	Approval of £0.959m grant funding to support the delivery of a year long programme of events and activities celebrating young people and their creativity	12/03/24	Mayoral Combined Authority Board	Sue Sykes Assistant Director - Funding, Monitoring and Reporting sue.sykes@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt

Annual Budget & Treasury Management Strategy	Approval of the Annual Mayoral Combined Authority Board Budget for 2024/25, and to consider the Treasury Management Strategy.	12/03/24	Mayoral Combined Authority Board	Gareth Sutton Executive Director of Resources & Investment Gareth.Sutton@southyorkshire-ca.gov.uk	MCA Board Report.	Not exempt

| UK Shared Prosperity Fund Applications 2023/24 | Approval of award(s) UK Shared Prosperity Fund to deliver schemes for 2023/24, up to the following amounts:

Communities and Place
Rotherham Metropolitan Borough Council: £631,840
Barnsley Metropolitan Borough Council: £650,047
Sheffield City Council: £1,389,200
City of Doncaster Council: £799,301

Local Business Support
Rotherham Metropolitan Borough Council: £795,173
Barnsley Metropolitan Borough Council: £818,086
Sheffield City Council: £1,748,313
City of Doncaster Council: £1,005,924

People and Skills
Rotherham Metropolitan Borough Council: £292,280
Barnsley Metropolitan Borough Council: £300,702
Sheffield City Council: £642,623
City of Doncaster Council: £369,745 | 13/03/24 | Section 73 Officer | Sue Sykes Assistant Director - Funding, Monitoring and Reporting

sue.sykes@southyorkshire-ca.gov.uk | Decision paper. | Not exempt |

Approval to appoint a contractor to a Supertram Track Improvement Framework contract and call-off the first year's work package of rail replacement	Approval is sought to enter into a framework contract which provides access to a contractor to undertake various works relating to the track on the Supertram system. The framework will last for a minimum of four years. Approval is also sought to commission the first call off to cover planned renewal works in the first year of the framework which has an estimated value of £7.5 - £8.0M.	27/03/24	Executive Director of Transport	Pat Beijer Executive Director of Transport (Acting) pat.beijer@southyorkshire-ca.gov.uk	Public Transport Team approvals paper and Record of Officer Decision	Not exempt
Microsoft Enterprise Agreement	The award of contract for the provision of the Microsoft Enterprise Agreement for a term of three years commencing 1 April 2024 at a total three-year cost of up to £1,323,738.	30/03/24	Section 73 Officer	Nick Brailsford Head of Digital Transformation nick.brailsford@southyorkshire-ca.gov.uk	Delegated Approval Report and Record of Officer Decision Form	Not exempt

Contract award to infill the disused former railway tunnel under Woodbourn Rd Parkway Avenue Sheffield	SYMCA requires the services of a suitably qualified and experienced Company to undertake the design and repair works of the tunnel under Woodbourn Road and Parkway Avenue, Sheffield to prolong the life of the structure. Estimated value of contract £900k.	10/04/24	Executive Director of Transport	Pat Beijer Executive Director of Transport (Acting) pat.beijer@southyorkshire-ca.gov.uk	Public Transport Team (PTT) Approval Paper	Not exempt
City Region Sustainable Transport Settlement (SBC) A628 Bus and Active Travel Priority Corridor - Shafton to Barnsley Town Centre	Approval to progress to Outline Business case and release of £1.11 million development grant to develop an outline business case for the A628 Shatfon to Barnsley Town Centre Scheme	tbc	tbc	tbc	Delegated Approvals Paper and Record of Officer Decision	Not exempt

City Region Sustainable Transport Settlement (SBC) - Shaw Lane Bus Lane & East Doncaster AT and Passenger Transport Connectivity	Approval to progress to Outline Business case and release of £2,240,000 development grant to develop a combined outline business case for the the Shaw Lane Bus Lane & East Doncaster AT and Passenger Transport Connectivity schemes.	tbc	tbc	tbc	Delegated Approvals Paper & record of Officer Decision Form	Not exempt

SOUTH YORKSHIRE
SY MCA
MAYORAL
COMBINED
AUTHORITY

Overview and Scrutiny Committee

Thursday, 14 March 2024

Overview & Scrutiny Committee Work Plan 2023/24

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Governance
Is this a Key Decision?	No
Has it been included on the Forward Plan of Key Decisions?	Not a Key Decision

Director Approving Submission of the Report:
Steve Davenport, Director of Legal and Governance

Report Author(s):
Sarah Pugh, Democratic Services Officer
Sarah.pugh@southyorkshire-ca.gov.uk

Summary

The MCA has been supporting the Overview and Scrutiny Committee to develop a robust and effective programme of work for the year.

A workshop was delivered with Committee members on 24th July 2023, which produced the attached draft Committee Work Programme (i.e. long-term agenda) for 2023/24.

This work programme focuses on the most significant upcoming change programmes at the MCA, and the areas of work which are high priorities for the Committee and South Yorkshire's Communities. It also remains flexible enough to accommodate any urgent, short-term issues that might arise during the year.

In addition to items for consideration at Committee meetings, the Committee also requested:
- That the Mayor to attend all meetings of the committee in person,

- That the Chair have an introduction meeting with the Mayor before the September Committee meeting,
- That where possible, the relevant portfolio holder attend Committee meetings in support of agenda items,
- Informal briefings in advance of significant items on upcoming agendas, such as on plans for tram ownership, Police and Crime Commissioner powers, and Bus Franchising,
- Informal briefings on some separate, lower-priority issues outside the cycle of Committee meetings.

The Overview & Scrutiny Committee is independent of the MCA Executive and the Scrutiny Officer will liaise with the Committee Chair and MCA Executive senior management to agree how best the Committee's requests to scrutinise the work of the MCA can be accommodated.

Recommendation(s)

That the Overview & Scrutiny Committee:
1. Note the attached Committee Work Plan for the remainder of 2023/24

List of Appendices Included:

A. Committee Work Plan 2023/24

March Board Meeting – Thursday 14th March 2024	
What?	**How?**
Update on South Yorkshire Airport City – Gareth Sutton	• Concise verbal update given presence on the Feb MCA agenda
£2 Bus Fare Impact Evaluation – Tim Taylor	• Any outcomes shared informally with Committee via online briefings and via collaborative documents • Board Paper in December incorporating Committee feedback
Bus Franchising Update – Pat Beijer	• Regular concise update
Local Nature Recovery Strategy – Laurie Heykoop	• Introduction to the topic
The Mayor's Safe Place to Sleep programme	• Introduction to the topic
Committee End of Year Report	• Report summarising Scrutiny Protocol requirements and recommended options for implementation • Preceded by an informal officer briefing via Teams • To include analysis and implementation of Scrutiny Protocol
Mayoral Scrutiny	• 5 Minute verbal update from Mayor • Followed by Committee questioning

This page is intentionally left blank

SOUTH YORKSHIRE
SYMCA
MAYORAL COMBINED AUTHORITY

Overview and Scrutiny Committee

Thursday, 14 March 2024

Summary of impact of £2 Fare Cap

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Monitoring/Assurance
Is this a Key Decision?	No
Has it been included on the Forward Plan of Key Decisions?	No

Director Approving Submission of the Report:
Pat Beijer, Interim Executive Director of Public Transport.

Report Author(s):
Tim Taylor, Director of Public Transport Operations.
Suzanne Hutchinson, Head of Commercial Development

tim.taylor@southyorkshire-ca.gov.uk
suzanne.hutchinson@SouthYorkshire-CA.gov.uk

Executive Summary

The South Yorkshire Mayoral Combined Authority implemented a fare cap initiative in 2022 which provided benefit to those who are regular users of the bus and tram network. This fares initiative looked to significantly discount and simplify the single fares paid by passengers, and in turn both encouraging patronage growth and to assist with affordability during a cost-of-living crisis.

This paper sets out the latest research and findings of this initiative, and the relative success it has had in achieving its aims. It also provides recommendations on next steps.

What does this mean for businesses, people and places in South Yorkshire?

An effective bus and tram network is essential for the region to allow residents to access employment, education, healthcare and other services. It is central to support our communities,

economic plans and our regional growth ambitions.

SYMCA has choices on the use of discretionary concessions for specific customer groups access to discounted travel on the public transport network, thereby allowing them to also access employment, education, healthcare and other services which might not otherwise be affordable.

Recommendations

That the OSC members:

1. Recognise the benefits of the local and national £2 bus fare cap and the locally funded £2.80 tram fare cap.
2. Support the need for further market research into the fare cap on bus and tram in Autumn 2024.
3. Endorse the need to agree an exit strategy for the national £2 bus fare cap when it ends on 31 December 2024, and the tram fare cap which is due to end on 30 November 2024.

1. Background

1.3 As part of wider policy choice discussions about supporting public transport, SYMCA took the decision in September 2022 to introduce a fare cap on bus and tram, starting from 1 November 2022. This capped all adult single fares across bus and tram at no more than £2.

1.4 The bus fare cap was funded by SYMCA for two months through to 1 January 2023, at which point DfT assumed responsibility as part of a national fare cap scheme which was originally only intended to run to the end of March 2023 but was further extended until 31 December 2024.

1.5 Because there is no national fare cap scheme for light rail, SYMCA initially took the decision to fund the regional tram fare cap at £2 from 1 November 2022 until 31 March 2023. However, this was further extended to November 2024 to better align with the extension to the national bus fare cap scheme.

Policy Changes

1.6 As a result of wider budget pressures and the need to protect vital socially necessary bus services, the difficult decision was taken by SYMCA on 31 July 2023 to increase the tram fare cap from £2 to £2.80 (on the assumption that the national bus fare cap would rise to £2.50 from 1 November 2023 but subsequently held at £2), as well as increase the under-18 child notified fare from 80p to £1. Both of these fare changes came into effect on 01 November 2023.

A summary of the key milestones associated with the changes can be seen below.

1.7

Date	Activity / decision	
	Bus	Tram
01 November 2022	SYMCA launches local bus £2 fare cap to run until 31 December 2023	SYMCA launches tram £2 fare cap to run until 31 March

	(when the national bus fare cap started).	2023 (to align with national bus fare cap).
01 January 2023	National bus fare cap launched to run until 31 March 2023.	
17 February 2023	DfT announces an extension to the national bus £2 fare cap to 30 June 2023.	
30 March 2023		SYMCA Transport and Environment Board agreed to extend the tram £2 fare cap to align with national bus fare cap until 30 June 2023.
17 May 2023	DfT announces further extension of £2 fare cap to 31 October 2023 when a £2.50 bus fare cap will be introduced until 30 November 2024.	
31 July 2023		SYMCA Board agree to continue the tram fare cap to align with the national bus fare cap extension and to increase the fare cap on tram to £2.80 from 01 November 2023 until 30 November 2024 in line with DfT's proposal to increase the bus fare cap to £2.50.
04 October 2023	At the Conservative party conference, announcement that the increase to £2.50 will not happen and the £2 bus fare cap will be retained from 01 November 2023 and that the scheme will run until 31 December 2024.	
01 November 2023		Tram fare cap increases to £2.80, whilst bus fare cap remains at £2.

2.   Key Issues

2.1   Given that SYMCA has committed around £0.9m to support the locally funded bus fare cap and to date almost £2.2m on the tram fare cap, it is important to evaluate and understand the benefits and outcomes these schemes have generated.

| 2.3 | Market research was commissioned in summer 2023 to evaluate passenger awareness and response to the £2 fare cap on bus and tram and field work took place between 09 September and 26 September 2023 inclusive. |

£2 Fare Cap Key Findings

| 2.7 | Whilst SYMCA funded the bus fare cap from 1 November 2022 to 31 December 2022, a total of 1.9m trips were made on bus at a cost of £884,000.

From 1 January 2023, the cost of reimbursement and hence tracking of bus trip volumes has passed to DfT. We therefore do not have access to the fare cap data for South Yorkshire operators beyond this date.

On tram, we have to date seen a total of 5.13m fare cap trips on the network, saving pass holders around £3.7m in direct costs. In total, SYMCA have so far paid fare cap reimbursement to Supertram of almost £2.2m.

The tram fare cap, initially set at £2 increased to £2.80 on 1 November 2023, which has significantly decreased the number of trips subject to a cap, as the existing £2.40 short-distance single fare is now below the new capped rate. Only the long-distance single fare is now capped from £3.20 to £2.80. |

2.8

Tram Fare Cap Trips
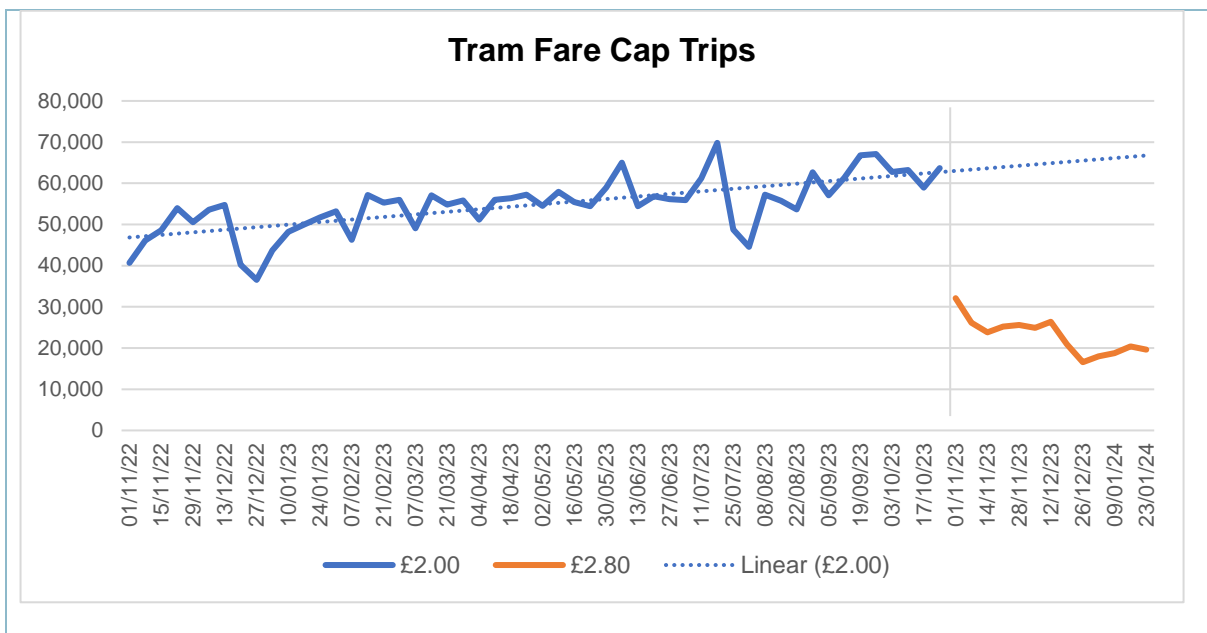
| 2.9 | Awareness of the fare cap still needs to improve. Overall, 42% are fully aware of the £2 single fare cap on buses, 6% somewhat aware and 52% are not at all aware. 59% of bus users are fully aware and 6% somewhat aware, compared with 28% of non-bus users that are fully aware and 5% somewhat aware.

Eligible bus users that now opt for the £2 single journey fare are saving on average between 10p and 58p per journey, while eligible tram users are saving between 45p and £1.13 per journey.

Across both bus and tram users, 15 out of 28 respondents said that they now make journeys by bus or tram that they previously made with other forms of transport and as a result of the £2 fare cap they have saved money (this |

represents about 2.5% of respondents). The savings made since the introduction of the fare range from £8 to £500 per person, with an average of £115 per person.

There is a net increase in bus use amongst those that mostly opt for the £2 single fare cap for their journeys by bus (net increase of 4% amongst eligible bus users compared to an overall net decrease in bus use of 5%).

Whist the majority of eligible bus and tram users are opting for the £2 single journey capped ticket for most of their journeys, there are opportunities to increase awareness of the ticket, which may increase use.

2.10 There is emerging evidence of the £2 single journey capped ticket having a positive impact on the amount spent on bus and tram journeys, and therefore the cost of living for those that use these services.

Overall, respondents are more likely to say they are now more satisfied with bus services as a result of the fare cap, than are less satisfied – 18% are at least slightly more satisfied compared with 1% slightly less satisfied.

There is some evidence of minor behaviour change in the form of more journeys, new users and modal shift amongst bus and tram users eligible and using the £2 single journey capped ticket.

The £2 single fare capped ticket is having a positive impact on quality of life, access to services and the perceptions of bus services, especially amongst bus and tram users.

Underlying this, certain groups are likely to benefit more than others as they are more likely to be bus and tram users – for example, women, disabled residents, residents from lower social grades, unemployed residents, residents without access to a car, and non-White British residents.

3.   Options Considered and Recommended Proposal

3.1   Option 1

3.2 Undertake a final piece of market research in Autumn 2024 to further validate the benefits identified thus far from the fare cap on both bus and tram in South Yorkshire. This can then be benchmarked against national evaluation expected to be conducted by DfT, assumed to be taking place in early 2025.

3.4 Commence a piece of work from April 2024 to agree as a minimum across South Yorkshire a controlled exit strategy from the £2 fare cap assuming it ends at the end of December 2024. This should be done through the bus Enhanced Partnership, chaired by the South Yorkshire Mayor.

3.5 Undertake further marketing and promotional work to raise the awareness of the £2 fare cap as over half (52%) of people unaware of the fare cap being in place.

3.7   Option 1 Risks and Mitigations

| 3.9 | As the £2 bus fare cap is a government-led initiative, we no longer have direct access to uptake and utilisation data. We will work with DfT and Transport Focus to understand what level of data we can ascertain at a regional and local level. |

3.10 **Option 2**

| 3.11 | Do nothing, undertake no further evaluation of the national or regional schemes. |

3.12 **Option 2 Risks and Mitigations**

| | If we do nothing, we will have limited understanding of the full impact of the two schemes and we will accept the findings and outcomes laid out in this paper and the results of the survey data carried out to date as the only information available to assess their success. |

3.13 **Recommended Option**

| | Option 1. |

4. Consultation on Proposal

| 4.1 | Not applicable. |

5. Timetable and Accountability for Implementing this Decision

| 5.1 | In April 2024, SYMCA plan to begin preparing an exit strategy for the end of the £2 fare cap on bus in readiness for the end of December 2024 (the timing of which is set by Government). In addition to this, a decision on the approach for the tram fare cap (planned to end at the end of November 2024) is also required, noting that the day-to-day operation of the service will be undertaken by South Yorkshire Future Trams Limited, a subsidiary of SYMCA by this time.

In Autumn 2024 SYMCA also plan to carry out further market research to provide another means of benchmarking the benefits of the bus and tram fare cap and to allow this to be compared to any national evaluation undertaken on the bus fare cap. |

6. Financial and Procurement Implications and Advice

| 6.1 | Should the recommended approach be support, some further promotion of £2 fare cap will be required in 2024/25. The costs of this will be incorporated in to the 2024/25 revenue budget and follow the usual procurement processes required. |

7. Legal Implications and Advice

| 7.1 | Not applicable. The tram £2 fare cap concession is not operated under the concessionary travel scheme. |

8. Human Resources Implications and Advice

| 8.1 | Not applicable. |

9.   Equality and Diversity Implications and Advice

9.1   Not applicable.

10.   Climate Change Implications and Advice

10.1   Not applicable.

11.   Information and Communication Technology Implications and Advice

11.1   Not applicable.

12.   Communications and Marketing Implications and Advice

12.1   It is recommended that SYMCA support the further promotion of £2 and £2.80 fare cap through marketing and communication campaign activity. The Bus Enhanced Partnership is considering using a proportion of its available marketing budget to promote the £2 fare cap, though at the time of writing this has yet to be confirmed.

List of Appendices Included

A   **SYMCA £2 Fare Travel Survey October 2023.**

SYMCA 2 Fare Travel
Survey - Report FINAl

This page is intentionally left blank

SYMCA: £2 Fare Travel Survey

Report: October 2023

SOUTH YORKSHIRE
SYMCA
MAYORAL COMBINED AUTHORITY

P

Research
Evaluation
Community Engagement
Strategy Development

www.publicperspectives.co.uk

Contents

SYMCA: £2 Fare Travel Survey

Executive Summary

Introduction and background to the research

1. South Yorkshire Mayoral Combined Authority (SYMCA) introduced a £2 capped fare for single trips on buses and trams in South Yorkshire in November 2022. In January 2023 a national £2 bus fare cap initiative was launched and SYMCA continued to support the same offer on trams.

2. SYMCA commissioned research to understand the public's view of the £2 fare cap and its impact on their travel behaviours and cost of living.

3. The research was conducted via a representative telephone survey of 611 residents living in South Yorkshire. The survey took place between 9th September to the 26th September 2023 inclusive.

Key findings

Awareness

4. Overall, 42% are fully aware of the £2 single fare cap on buses, 6% somewhat aware and 52% are not at all aware. 59% of bus users are fully aware and 6% somewhat aware, compared with 28% of non-bus users that are fully aware and 5% somewhat aware.

5. Overall, 28% are fully aware of the £2 single fare cap on trams, with 3% somewhat aware and 69% are not at all aware. Residents in Sheffield are naturally more aware, given the location of the tram (40% fully aware and 4% somewhat aware). 52% of tram users are fully aware and 3% somewhat aware, compared with 20% of non-tram users that are fully aware and 3% somewhat aware.

6. Promotional materials, word-of-mouth from family and friends, information from bus drivers and tram conductors, social media and local news are the main sources of awareness of the £2 fare cap initiative.

Use

7. 55% of bus users, eligible for the £2 single fare cap i.e. do not have access to a free travel pass, mostly use the single journey fare capped at £2. 16% still purchase a standard single fare, 8% a return fare, while the remaining bus users purchase weekly, monthly, flexi or season tickets.

8. Of those that do not opt for the single journey fare capped at £2, 23% said they are not fully aware of the fare and 10% said they were not made aware of the option at the point of purchase – these respondents represent a group that could be supported to utilise the capped fare. This group represents about 4% of all respondents and approximately 15% of all bus users eligible for the capped fare. This suggests increasing awareness of the fare cap could grow use to around two-thirds of all bus users.

9. 54% of tram users (eligible for the £2 single fare cap) mostly use the single journey fare capped at £2. 15% still purchase a standard single fare, 13% a return fare, while the

remaining tram users purchase weekly, flexi or season tickets, or have not travelled on the tram since the introduction of the fare.

10. Of those that do not opt for the single journey fare capped at £2, 35% said they are not fully aware of the fare and 22% said they were not made aware of the option at the point of purchase – these respondents represent a group that could be supported to utilise the capped fare. This group represents about 4% of all respondents and approximately 25% of all tram users eligible for the capped fare. This suggests increasing awareness of the fare cap could grow use to some three-quarters of all tram users.

Savings

11. Eligible bus users that now opt for the £2 single journey fare are saving on average between 10p and 58p per journey, while eligible tram users are saving between 45p and £1.13 per journey.

12. Across both bus and tram users, there are 15 out of 28 respondents that said they now make journeys by bus or tram that they previously made with other forms of transport and as a result of the £2 fare cap they have saved money (this represents about 2.5% of respondents). The savings made since the introduction of the fare range from £8 to £500 per person, with an average of £115 per person.

Change in behaviour

13. There is a net increase in bus use amongst those that mostly opt for the £2 single fare cap for their journeys by bus (net increase of 4 percentage points amongst eligible bus users compared to an overall net decrease in bus use of -5 percentage points) and this likely translates into net increased bus journeys. Likewise, there are a small number of new bus users and there has also been a shift away from other modes of transport to the bus amongst a small number of respondents that now use the £2 fare cap.

14. Whilst there is a net decrease in tram usage, this decrease is less amongst those that mostly opt for the single journey fare cap (net decrease of -4 percentage points amongst eligible tram users compared to an overall net decrease in tram use of -14 percentage points). Likewise, there are a small number of new tram users and shift away from other modes of transport to the tram amongst respondents that now use the £2 fare cap.

Impact on quality of life, access to services and satisfaction with services

15. Across all indicators, there is a net positive impact of the fare cap on bus and/or tram users, including on frequency of travel, access to education, employment opportunities, access to leisure and recreation, and cost of living. For example, on average, across all the indicators, there is a net positive impact amongst bus and/or tram users of +15%.

16. Overall, respondents are more likely to say they are now more satisfied with bus services as a result of the fare cap, than are less satisfied – 18% are at least slightly more satisfied compared with 1% slightly less satisfied.

17. Bus users are more satisfied – 32% are at least slightly more satisfied with bus services compared with 2% that are less satisfied. This increases to 47% that are at least slightly more satisfied amongst those bus users eligible for the fare cap (and 1% slightly less satisfied).

Summary and concluding points for consideration

18. Whist the majority of eligible bus and tram users are opting for the £2 single journey capped ticket for most of their journeys, there are opportunities to increase awareness of the ticket, which may increase use.

19. There is emerging evidence of the £2 single journey capped ticket having a positive impact on the amount spent on bus and tram journeys, and therefore the cost of living for those that use these services.

20. There is some evidence of minor behaviour change in the form of more journeys, new users and modal shift amongst bus and tram users eligible and using the £2 single journey capped ticket.

21. The £2 single fare capped ticket is having a positive impact on quality of life, access to services and the perceptions of bus services, especially amongst bus and tram users.

22. Underlying this, certain groups are likely to benefit more than others as they are more likely to be bus and tram users – for example, women, disabled residents, residents from lower social grades, unemployed residents, residents without access to a car, and non-White British residents.

23. Whilst the scheme has been in place since November 2022, there may be benefit in subsequent waves of surveying to assess its sustained and potentially growing impact. This is especially relevant where there are opportunities to increase awareness and use, and similarly where behaviour change can be a slower and more gradual process.

SYMCA: £2 Fare Travel Survey

Main Report

Section 1: Introduction

Introduction and background to the research

1.1.　South Yorkshire Mayoral Combined Authority (SYMCA) introduced a £2 capped fare for single trips on buses and trams in South Yorkshire in November 2022. In January 2023 a national £2 bus fare cap initiative was launched and SYMCA continued to support the same offer on trams.

1.2.　SYMCA commissioned research to understand the public's view of the £2 fare cap and its impact on their travel behaviours and cost of living.

Aims of the research

1.3.　The survey covers the following key issues:

- Levels of bus and tram use, purpose of travel, and barriers to travelling by bus and tram.
- Awareness and use of the £2 bus and tram fare.
- Impact of the £2 fare on travel behaviour, and its economic impact.
- Overall perceptions of the £2 fare initiative and its implications for local bus and tram services.

Approach to the research

1.4.　The research was conducted via a representative telephone survey of 611 residents living in South Yorkshire. The survey took place between 9th September to the 26th September 2023 inclusive.

1.5.　A questionnaire was developed in conjunction with SYMCA to capture information to answer the aims and objectives of the research (see appendix). The questionnaire drew on questions developed by the national evaluation of the fare cap. The questionnaire was tested with a small number of the target audience prior to its full implementation to ensure it worked effectively in practice.

1.6.　Quotas were set based on the latest population data available to help ensure that the survey sample was demographically representative of the local population. Quotas were set by location (local authority area), gender, age and employment status.

1.7.　Interviews were conducted at different times of the day and different days of the week, including evenings and weekends, to ensure a good mix of respondents.

1.8.　With 611 respondents, the survey provides for robust data. At this number of respondents, the sample error or accuracy of the survey results is +/- 4% at a 95% confidence level.[1] This means that we can be 95% confident that the "real" result for any given question would be within 4 percentage points of those stated within the survey findings. This provides for robust data when analysed at a headline level and when different questions are cross-referenced against each other. It also allows for reliable comparison over time.

---

[1] Sampling error exists because even when surveying as robustly as has been the case with this survey, only a proportion of the population has been interviewed. Sampling error, therefore, is the measure of accuracy between the survey results and those that would have been obtained if all residents in the area had been surveyed i.e. a census conducted.

1.9. The following table shows the demographic profile of respondents to the survey:

Demographic	Percentage of interviews achieved	Percentage of population
Gender		
Male	49%	49%
Female	51%	51%
Age		
16-17	2%	3%
18-24	11%	11%
25-34	17%	17%
35-44	16%	15%
45-54	15%	16%
55-64	17%	16%
65-74	11%	12%
75+	11%	11%
Local Authority area		
Barnsley	18%	18%
Doncaster	21%	22%
Rotherham	20%	19%
Sheffield City	41%	41%

Note: All quotas were achieved within 1-2 percentage points of their target and the results 're-weighted' to be fully in line with the latest local population demographics (these were derived from the ONS mid-year population estimates 2022).

Reporting

1.10. The main report summarises the key findings from the research. Each relevant question has been analysed against a set of key demographic and conceptual variables to identify any relevant patterns, trends, similarities or differences by different types of respondents. Commentary is only provided where significant or meaningful findings are identified. The variables include:

- Gender
- Age
- Ethnicity
- Disability
- Employment/Education status
- Socio-economic status
- Type of area – urban v rural
- Local Authority area (most questions, where feasible, are presented by District to provide local comparison, however, please be aware of some small sample sizes that mean differences between Districts may not always be statistically significant)
- Vehicle access/use
- Levels of bus/tram use
- Awareness and/or use of £2 fare cap

1.11. The report is divided into the following sections:

- Section 2: Travel behaviour
- Section 3: The £2 fare cap – awareness, use and impact

Section 2: Travel behaviour

Introduction

2.1. This section provides context and presents findings about travel behaviour, including:
- Transport modes
- Journey purpose
- Levels of bus and tram use
- Reasons for travelling by bus and/or tram
- Barriers to travelling by bus and/or tram

Transport modes

Almost two-thirds travel by car or van most frequently in a typical week, followed by a quarter travelling by bus and 1-in-50 by tram

2.2. 61% of residents most frequently travel by car or van as a driver in a typical week (and 3% as a passenger).

2.3. 25% travel by bus most frequently and 2% by tram.

2.4. Bus use is highest amongst residents aged 35-54 (30% use a bus as their main form of transport), residents aged 75+ (39% use a bus), women (28%), residents living in inner city areas (33%), residents that do not have access to a car etc (69%), residents living with a disability (31%), non-White British residents (31%), unemployed residents (45%) and residents in lower social grades C2DE (38%). These residents also tend to use the tram more, although the percentage point differences are much less, due to the relatively low usage levels.

**Figure 2.1: Most frequently used method of transport in a typical week**
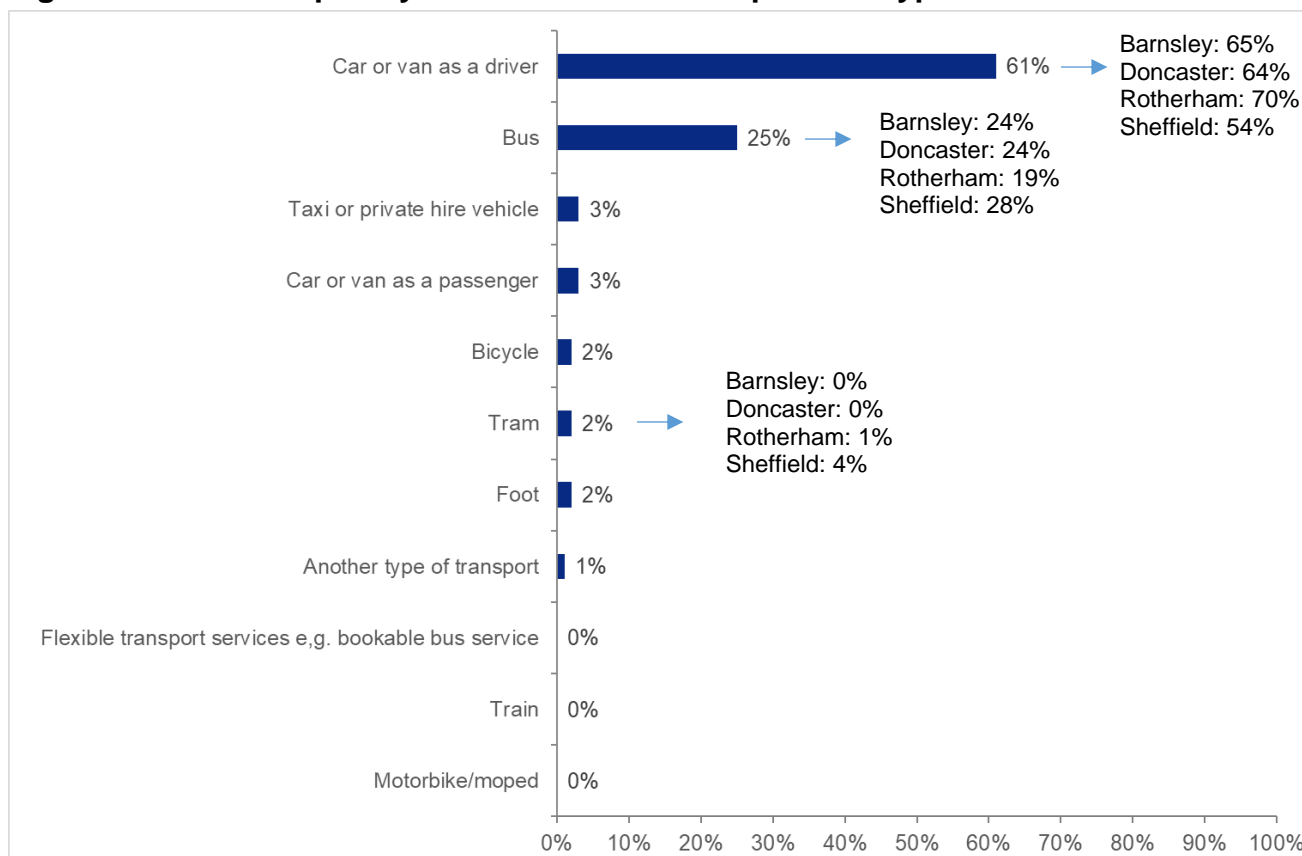
Number of respondents: 610. Question: Thinking about the journeys you undertake in a typical week, which type of transport do you use most often?

Journey purpose

Most residents travel to and from a place of work, with car/van drivers more likely to do so than bus or tram users

2.5. 53% of respondents mainly travel to and from work (and this is higher amongst working age residents – 67%), with 28% travelling mainly to go shopping.

2.6. 65% that mainly travel by car/van as a driver go to and from work and 22% go shopping.

2.7. 36% that mainly travel by bus go to and from work and 37% go shopping.

2.8. Of the small number (12 respondents) that mainly travel by tram, 47% travel to and from work and 45% go shopping.

Figure 2.2: Main reason for travelling by transport mode
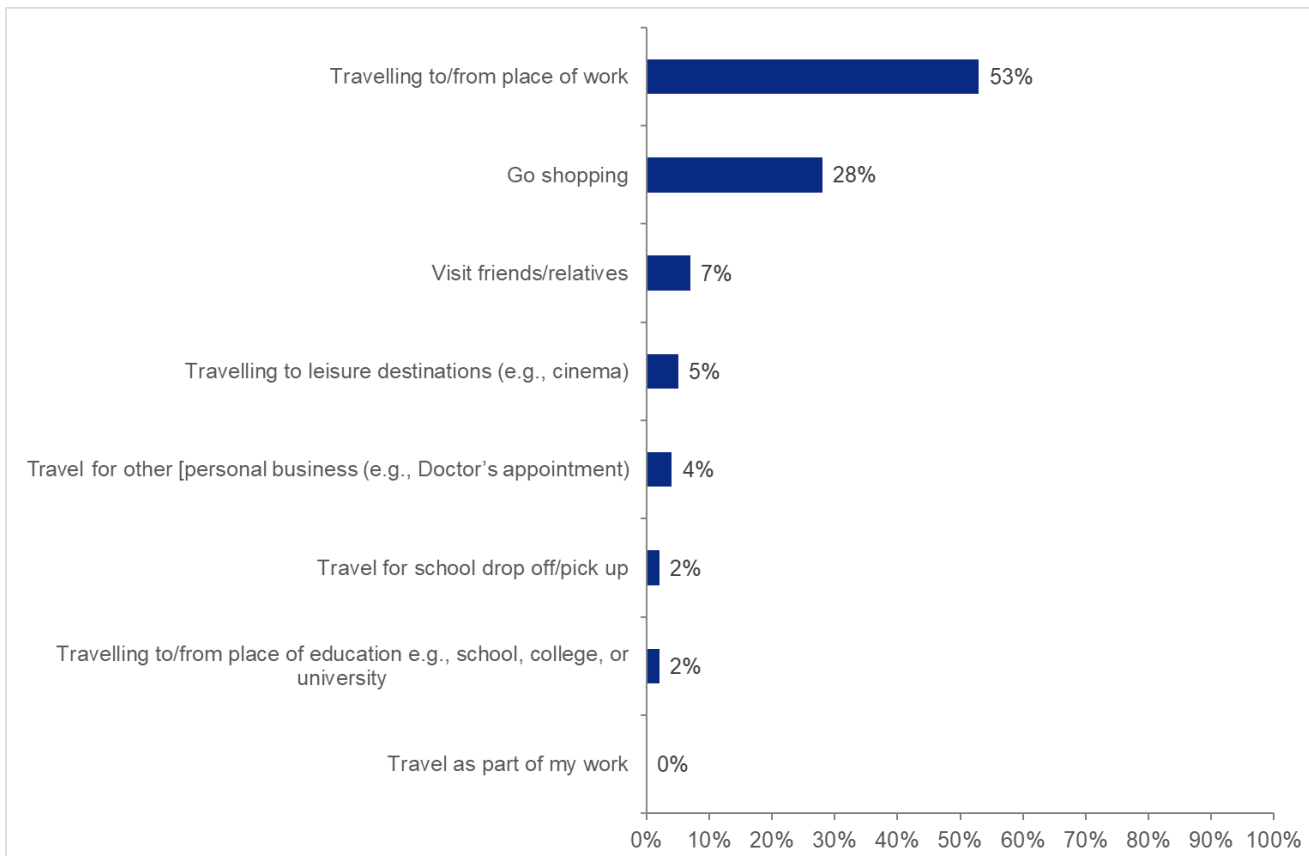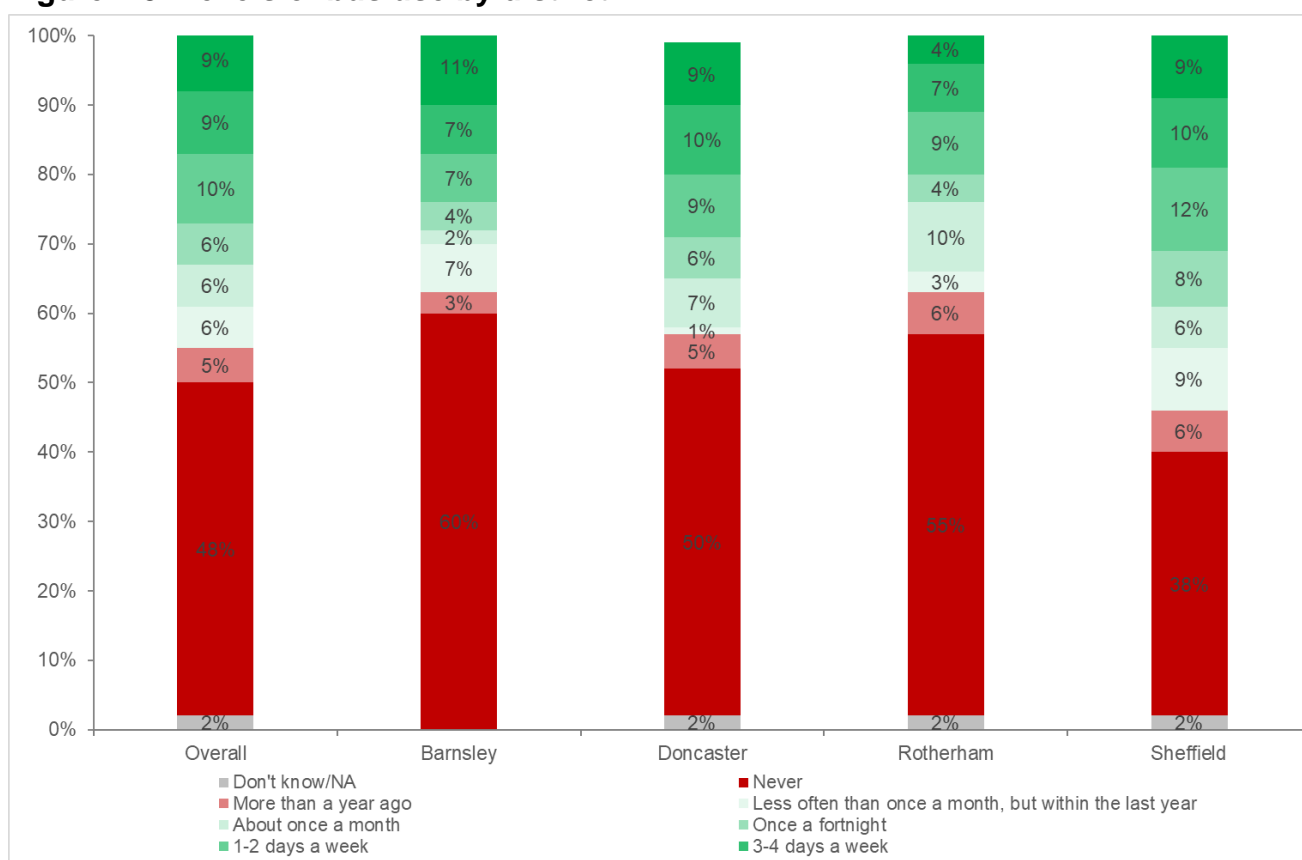

Number of respondents: 605.

Question: What is the main purpose for your journeys? If you travel by for more than one purpose, please think about the journey you undertake most often.

Levels of bus and tram use

Just under a half can be defined as bus users, with variation by district and key demographics

2.9. Overall, 46% of respondents are bus users to lesser or greater degrees (defined by using a bus at least once a year).

2.10. There is variation by district – Barnsley (38% bus users), Doncaster (42%), Rotherham (37%), and Sheffield (54%).

2.11. The patterns identified with bus use earlier in this report generally hold for this question, with the higher rates of bus use amongst residents aged 35-54 (51% bus users), residents aged 65+ (59%), residents that do not have access to a car etc (82%), residents living with a disability (54%), non-White British residents (58%), unemployed residents (55%) and residents in lower social grades C2DE (57%).

Figure 2.3: Levels of bus use by district

Number of respondents: 609.

Question: How often do you travel by each of the following forms of transport?

A quarter can be defined as tram users, with variation by district and some key demographics

2.12.   Overall, 25% of respondents are tram users to lesser or greater degrees (defined by using a tram at least once a year). 79% of tram users are also bus users.

2.13.   There is variation by district (as is expected given that the tram operates in Sheffield) – Barnsley (10% tram users), Doncaster (13%), Rotherham (21%), and Sheffield (41%).

2.14.   There are higher rates of tram use amongst residents aged 35-59 (29% tram users), residents aged 75+ (36%), residents living in urban areas (31%) and residents that do not have access to a car etc (37%).

Figure 2.4: Levels of tram use by district
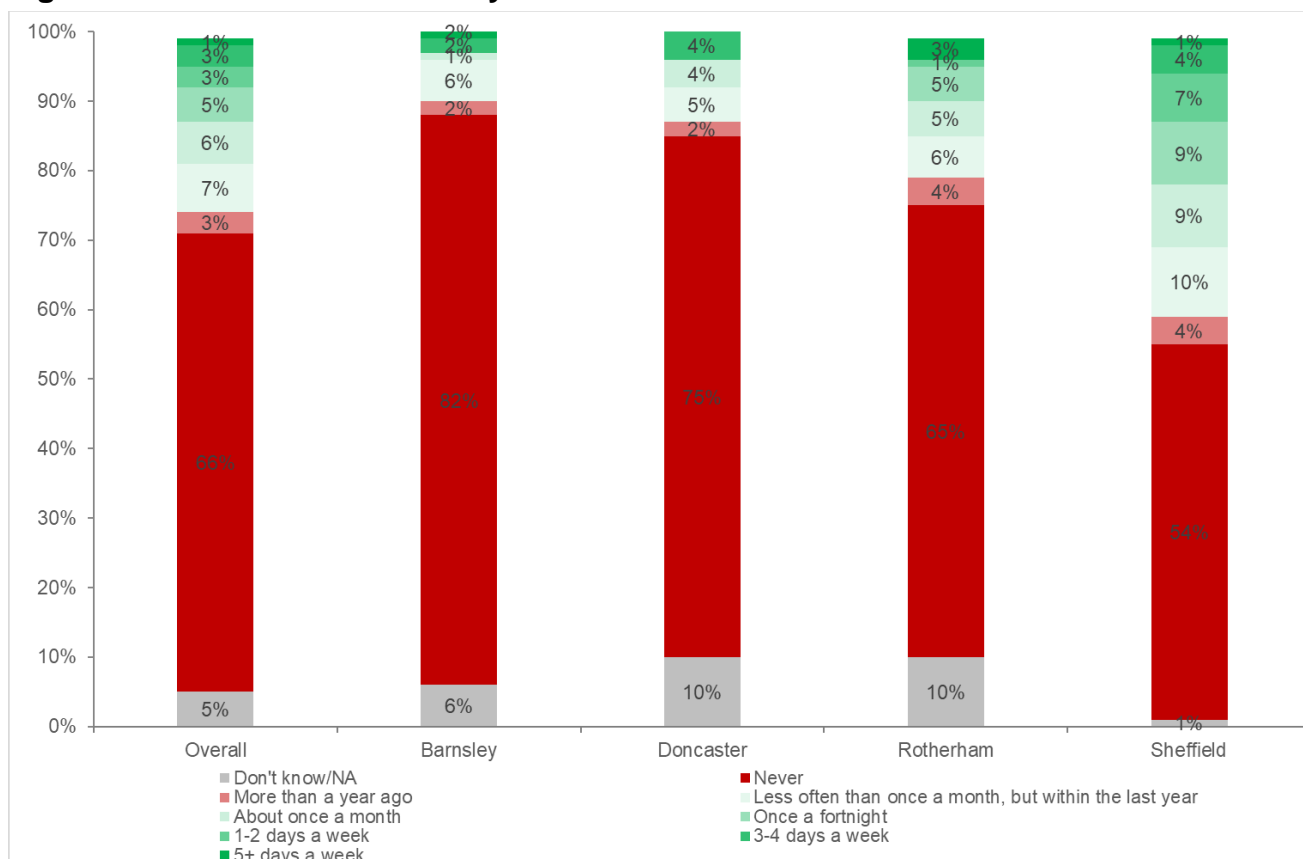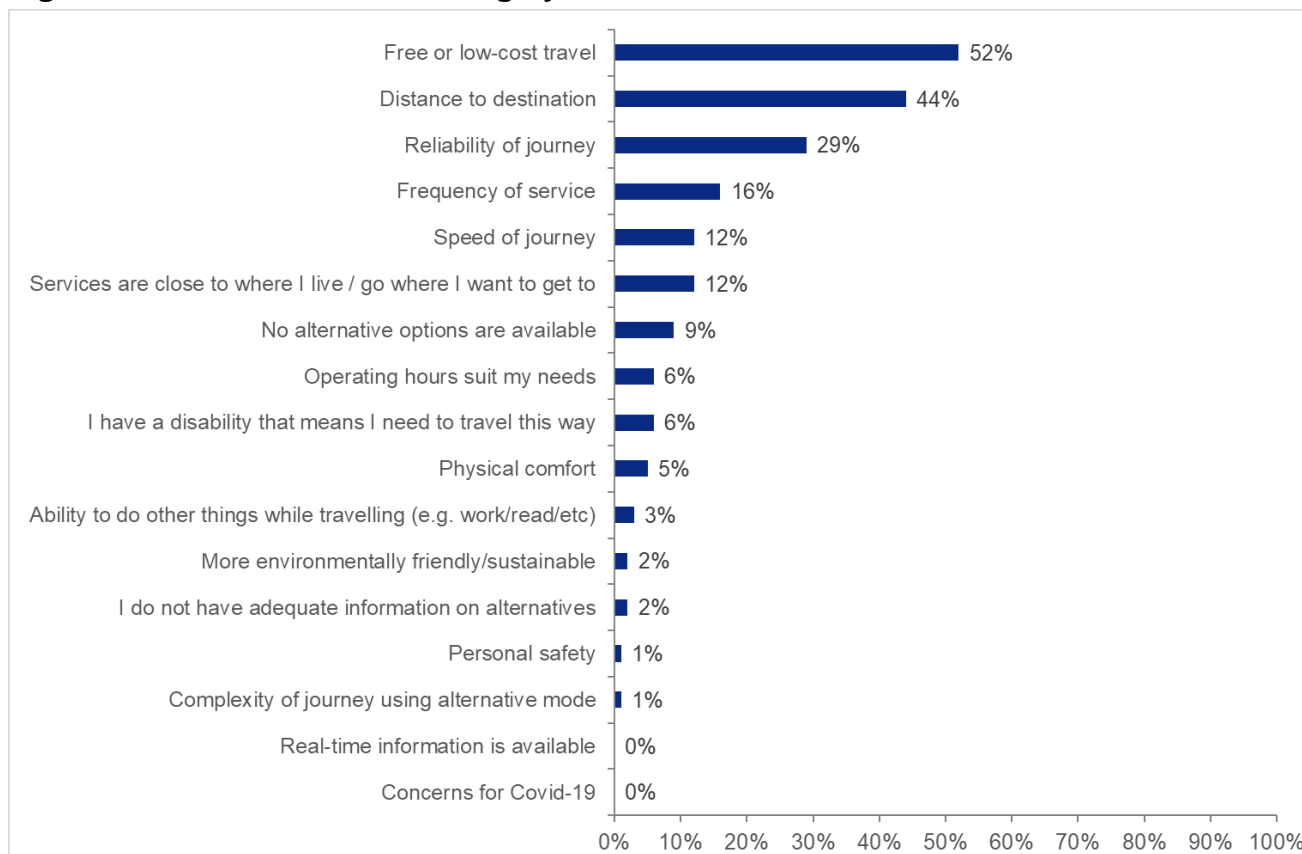

Number of respondents: 593.

Question: How often do you travel by each of the following forms of transport?

Reasons for travelling by bus and/or tram

The main reasons for travelling by bus are free or low-cost travel, distance to get to destination of choice and reliability of the journey

2.15. 52% of bus users said they travel by bus because it is either free or low cost, particularly bus users aged 75+ (cited by 64%) and residents in lower social grades (cited by 62%).

2.16. 44% said they travel by bus because of the distance to their destination (defined as ease of travel and/or closeness of stops to home and destination), 29% due to reliability, 16% due to frequency of service, 12% due to speed of journey and 12% because services are close to where they want to go.

Figure 2.5: Reasons for travelling by bus
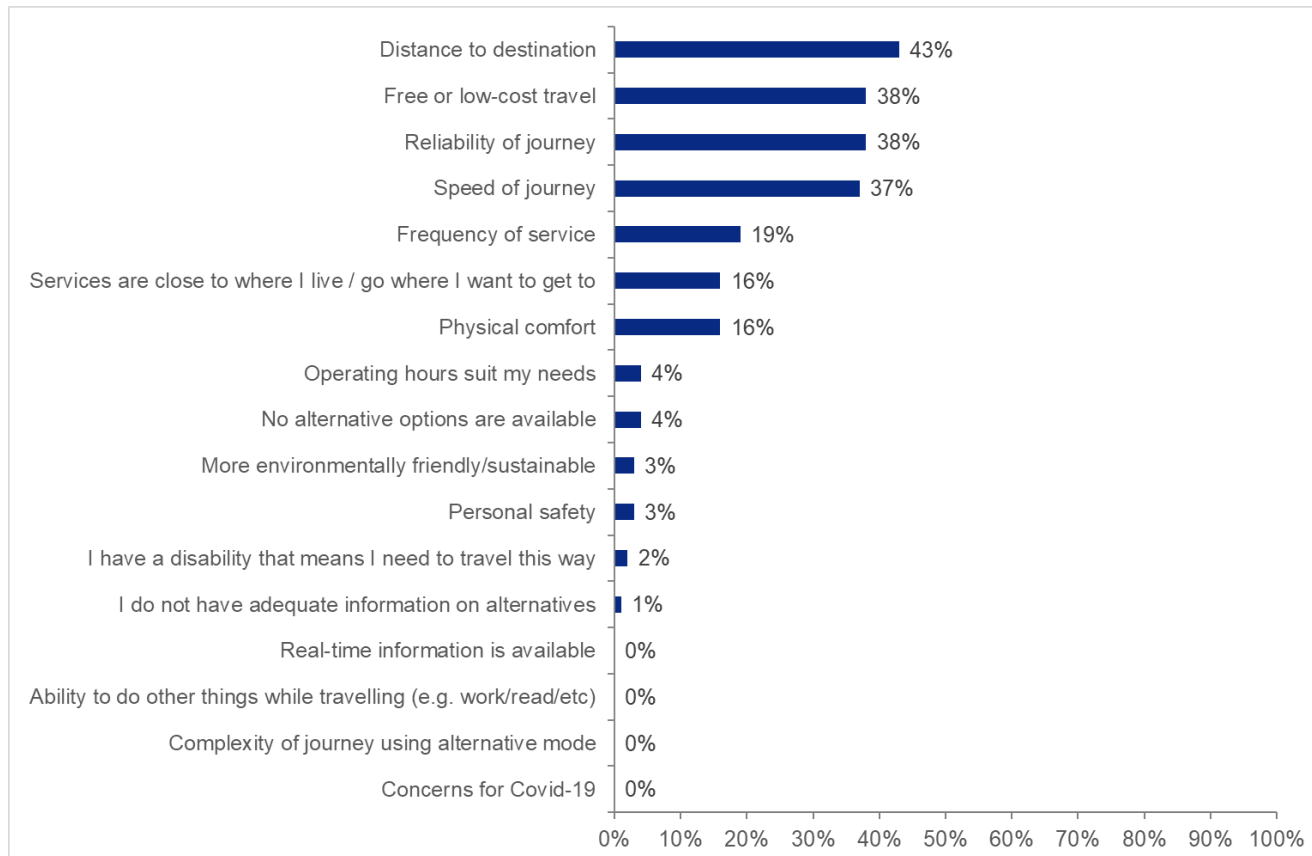

Number of respondents: 257.

Question: What are your top three reasons for travelling by bus, rather than another type of transport? (Only asked to bus users).

The main reasons for travelling by tram are distance to destination, free or low-cost travel, reliability and speed

2.17. The main reasons mentioned for using the tram are distance to destination (cited by 43%), free or low-cost travel (38%), reliability of journey (38%) and speed of journey (37%).

2.18. 18% cited frequency of service, 16% that services are close to them and 16% mentioned physical comfort.

Figure 2.6: Reasons for travelling by tram

Number of respondents: 132.

Question: What are your top three reasons for travelling by tram, rather than another type of transport? (Only asked to tram users).

Barriers to travelling by bus and/or tram

The main barriers to travelling by bus are preferring to drive, reliability, frequency and bus services not going where needed, as well as lack of interest

2.19.   The main barriers to travelling by bus are preferring to drive (cited by 17%), reliability of services and the journey (16%), frequency of services (15%), and services not going where needed (12%).

2.20.   In addition. 15% said they already use the buses as much as they want (all bus users) and 14% said they are just not interested in travelling by bus (all non-bus users).

2.21.   Only 5% cited cost/too expensive.

Figure 2.7: Barriers to travelling by bus
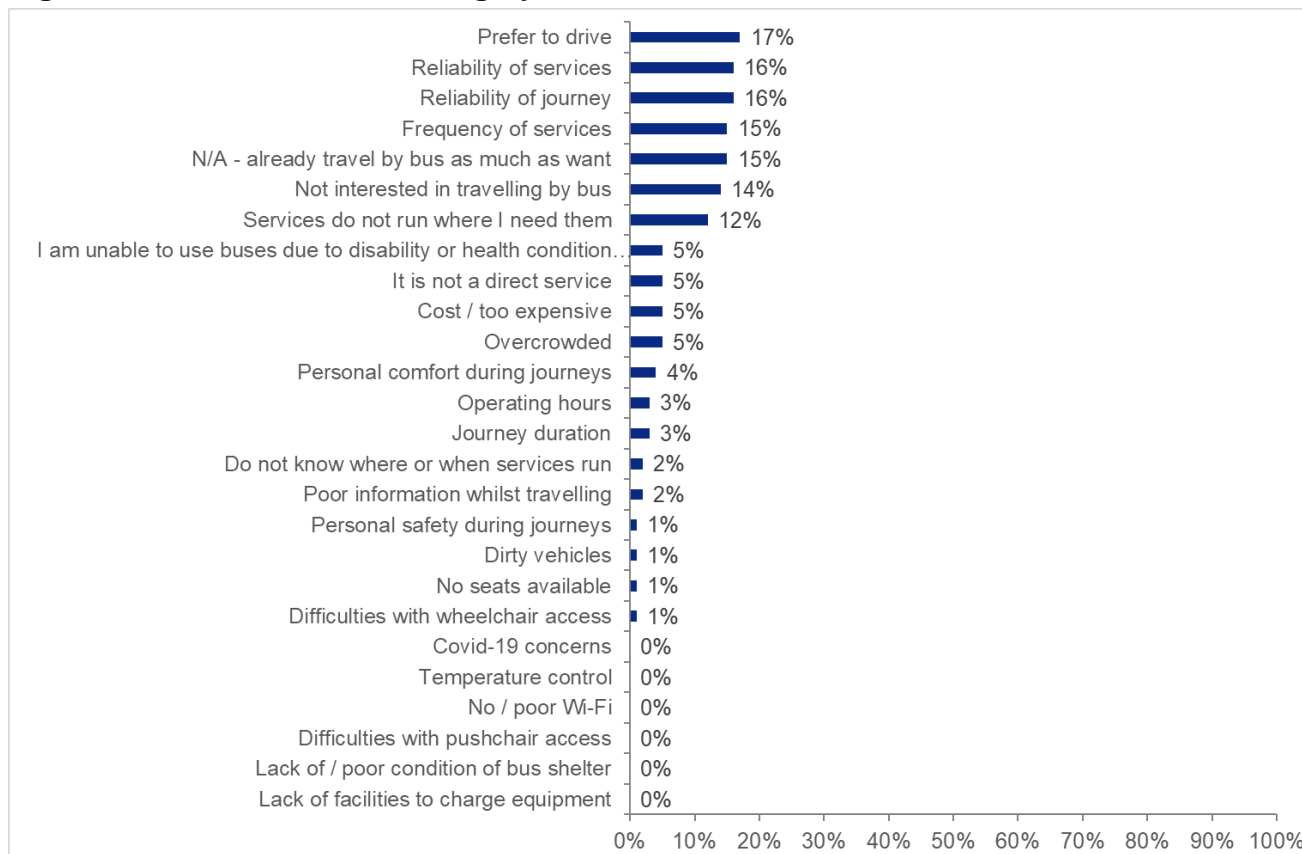
Number of respondents: 611.

Question: What if anything stops you from using the bus at all or as much as you may like? (Respondents could select more than one answer)

The main barriers to travelling by tram are there not being a tram nearby, services not going where needed and preferring to drive, as well as lack of interest

2.22. The main barriers to travelling by tram are there not being a tram nearby (mainly applicable to those living outside of Sheffield) (cited by 24%), services not running where needed (16%) and preferring to drive (9%).

2.23. 19% said they already use the tram as much as they want (all tram users) and 14% said they are just not interested in travelling by bus (all non-tram users).

2.24. Only 2% cited cost/too expensive.

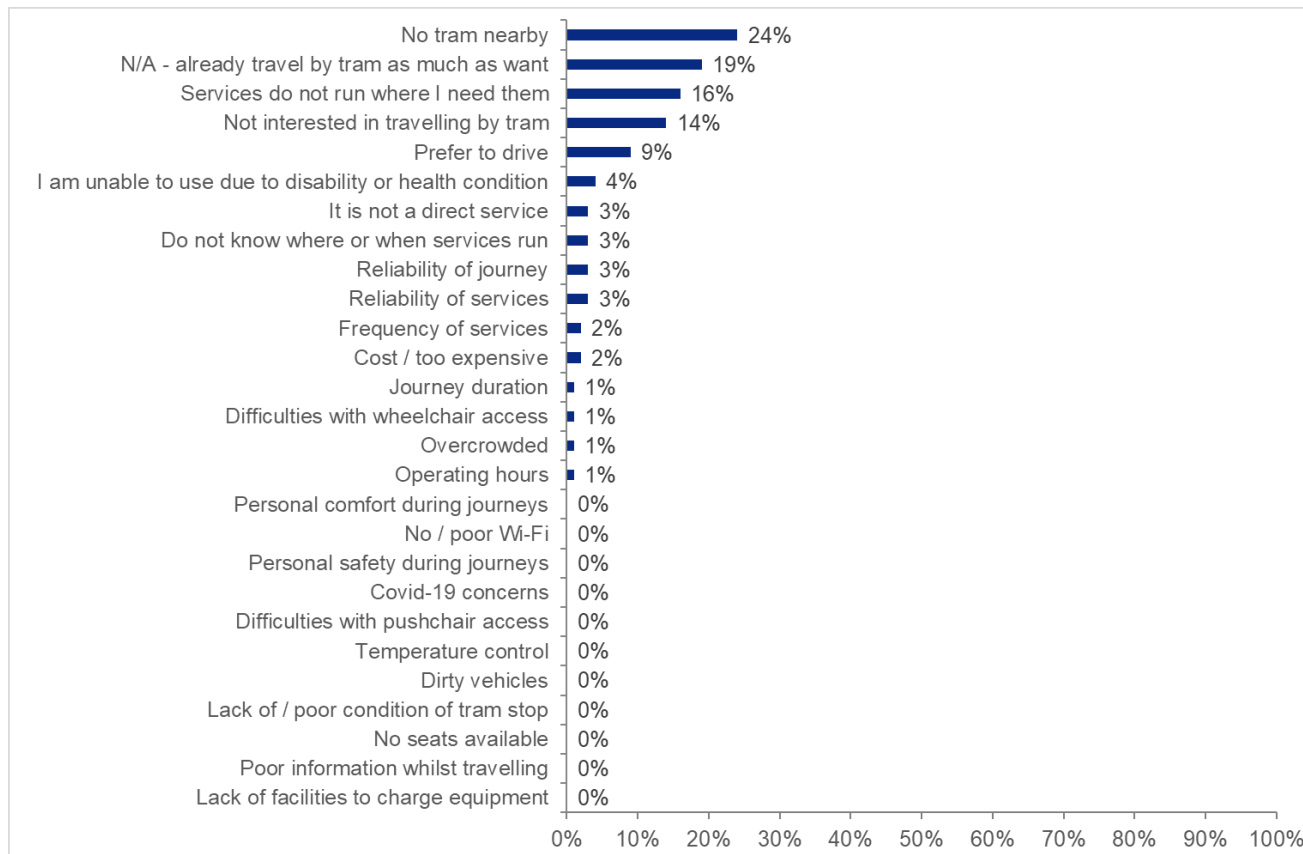**Figure 2.8: Barriers to travelling by tram**

Number of respondents: 611.

Question: What if anything stops you from using the tram at all or as much as you may like? (Respondents could select more than one answer)

Section 3: The £2 fare cap – awareness, use and impact

Introduction

3.1. This section covers awareness, use and impact of the £2 fare cap, including:

- Levels of awareness of the fare cap
- Levels of use of the fare cap
- Savings associated with the fare cap
- Change in behaviour associated with the fare cap
- Impact on quality of life and access to services associated with the fare cap
- Overall view of the fare cap

Awareness of the £2 fare cap

Over two-fifths are fully aware of the £2 single fare cap on buses, especially bus users

3.2. Overall, 42% are fully aware of the £2 single fare cap on buses, 6% somewhat aware and 52% are not at all aware. 59% of bus users are fully aware and 6% somewhat aware, compared with 28% of non-bus users that are fully aware and 5% somewhat aware.

Figure 3.1: Awareness of £2 fare cap on buses by district
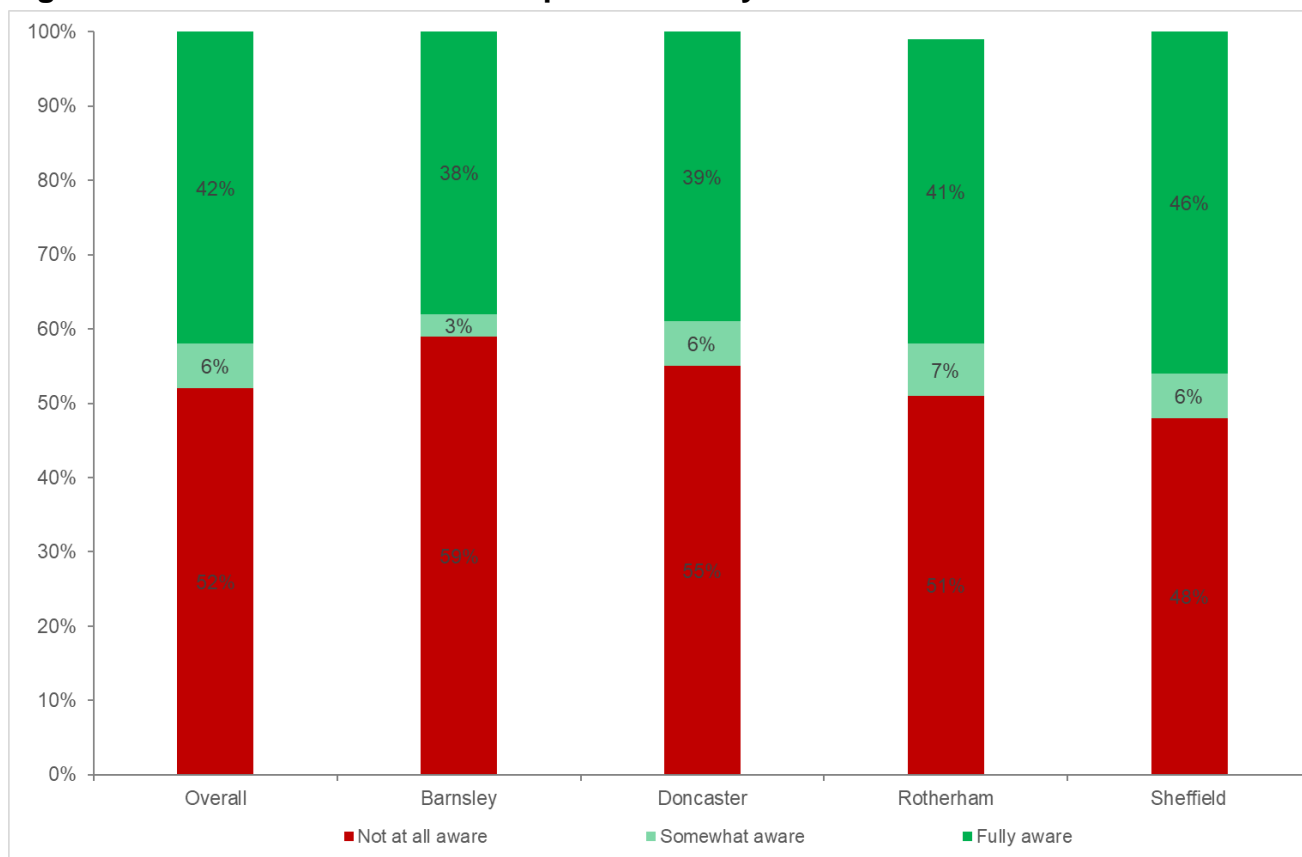
Number of respondents: 610.

Question: Are you aware of the bus ticket initiative in place since 1st November that caps the price you pay for a single bus or tram and journey to a maximum of £2?

Promotional materials, word-of-mouth, from bus drivers, social media and local news are the main sources of awareness of the £2 bus fare cap initiative

3.3.   The main source of awareness of the £2 bus fare cap is promotional posters and leaflets (23%), followed by word-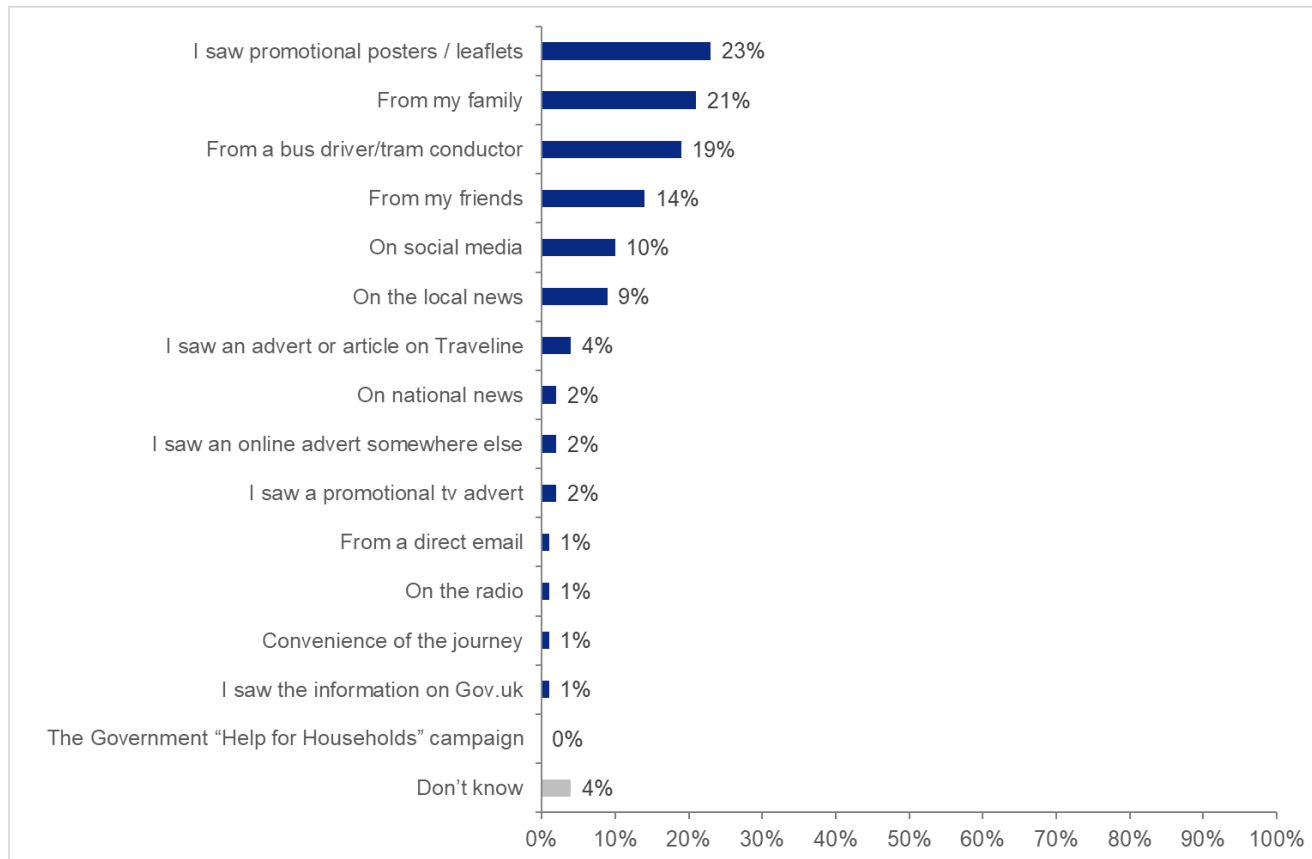of-mouth from family (21%) and friends (14%), in-situ from the bus driver (19%), as well as from social media (10%) and local news (9%).

Figure 3.2: Source of awareness of £2 bus fare cap

Source	%
I saw promotional posters / leaflets	23%
From my family	21%
From a bus driver/tram conductor	19%
From my friends	14%
On social media	10%
On the local news	9%
I saw an advert or article on Traveline	4%
On national news	2%
I saw an online advert somewhere else	2%
I saw a promotional tv advert	2%
From a direct email	1%
On the radio	1%
Convenience of the journey	1%
I saw the information on Gov.uk	1%
The Government "Help for Households" campaign	0%
Don't know	4%

Number of respondents: 284.

Question: How did you find out about the £2 fare cap initiative for a single bus journey? (Only asked to those aware of the £2 bus fare cap) (Respondents could select more than one answer)

Over a quarter are fully aware of the £2 single fare cap on trams, especially tram users

3.4.   Overall, 28% are fully aware of the £2 single fare cap on trams, with 3% somewhat aware and 69% are not at all aware. Residents in Sheffield are naturally more aware, given the location of the tram (40% fully aware and 4% somewhat aware).

3.5.   52% of tram users are fully aware and 3% somewhat aware, compared with 20% of non-tram users that are fully aware and 3% somewhat aware.

Figure 3.3: Awareness of £2 fare cap on trams by district
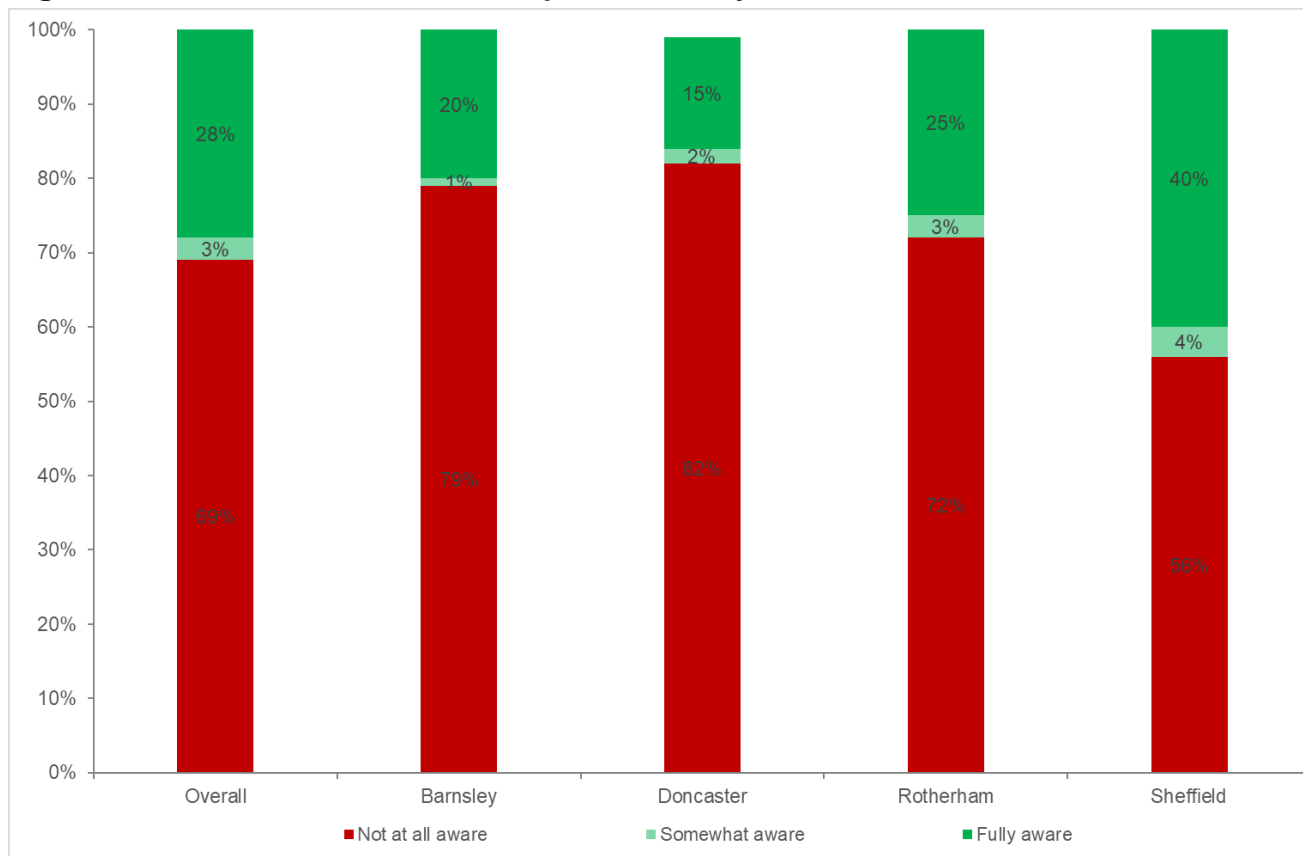
Number of respondents: 610.

Question: Are you aware of the tram ticket initiative in place since 1st November that caps the price you pay for a single bus or tram journey to a maximum of £2?

Word-of-mouth from family and friends, promotional materials, from tram conductors, social media and local news are the main sources of awareness of the £2 tram fare cap initiative

3.6.   The main sources of awareness of the £2 tram fare cap are similar to those for the bus fare, albeit in a slightly different order – 24% are aware from their family, 20% from promotional posters and leaflets, 20% from the tram conductor, 14% from friends, 14% from social media and 10% from local news.

**Figure 3.4: Source of awareness of £2 tram fare cap**
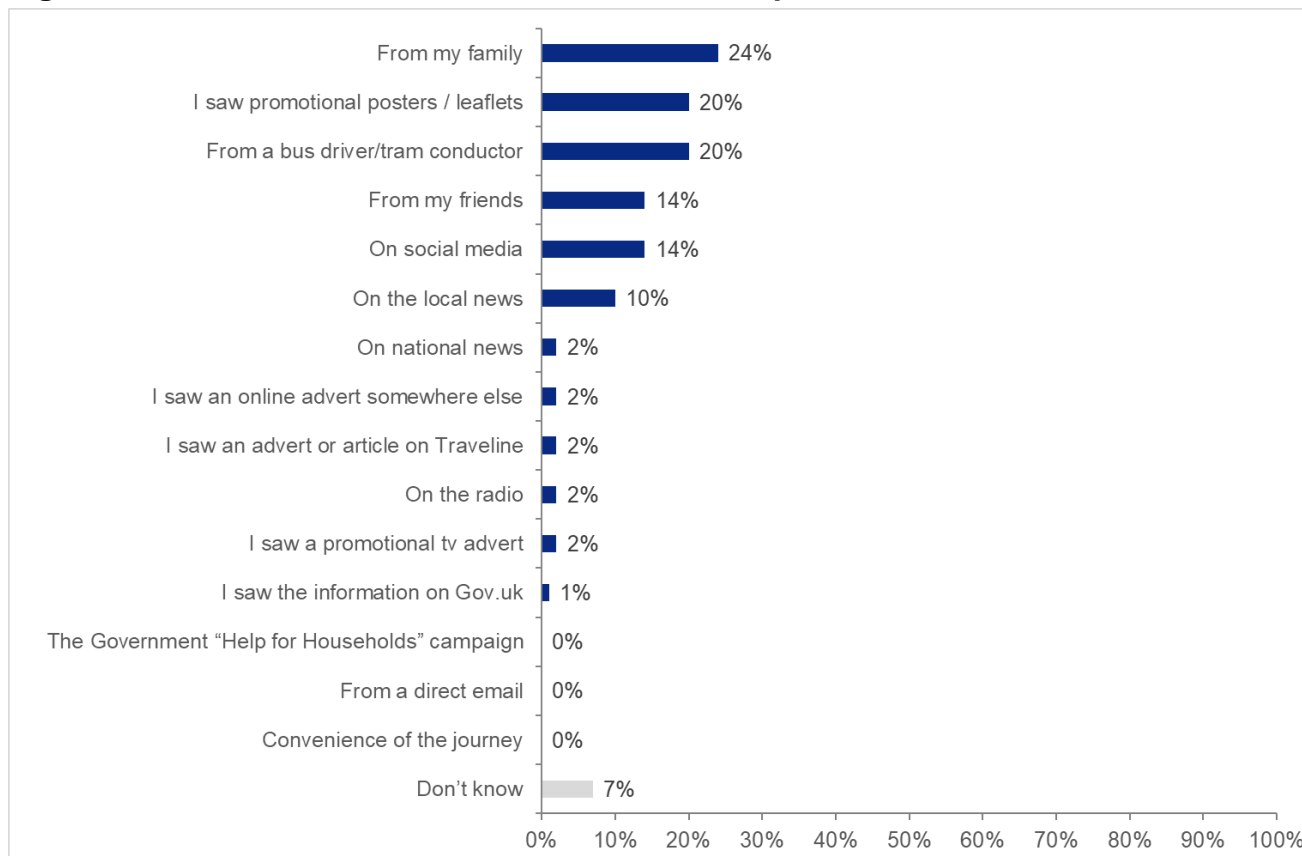
Number of respondents: 166.

Question: How did you find out about the £2 fare cap initiative for a single tram journey? (Only asked to those aware of the £2 tram fare cap) (Respondents could select more than one answer)

Use of the £2 fare cap

Over half of eligible bus users tend to opt for a £2 single journey capped fare, with potential to grow this number to about two-thirds of all eligible bus users through increased awareness alone
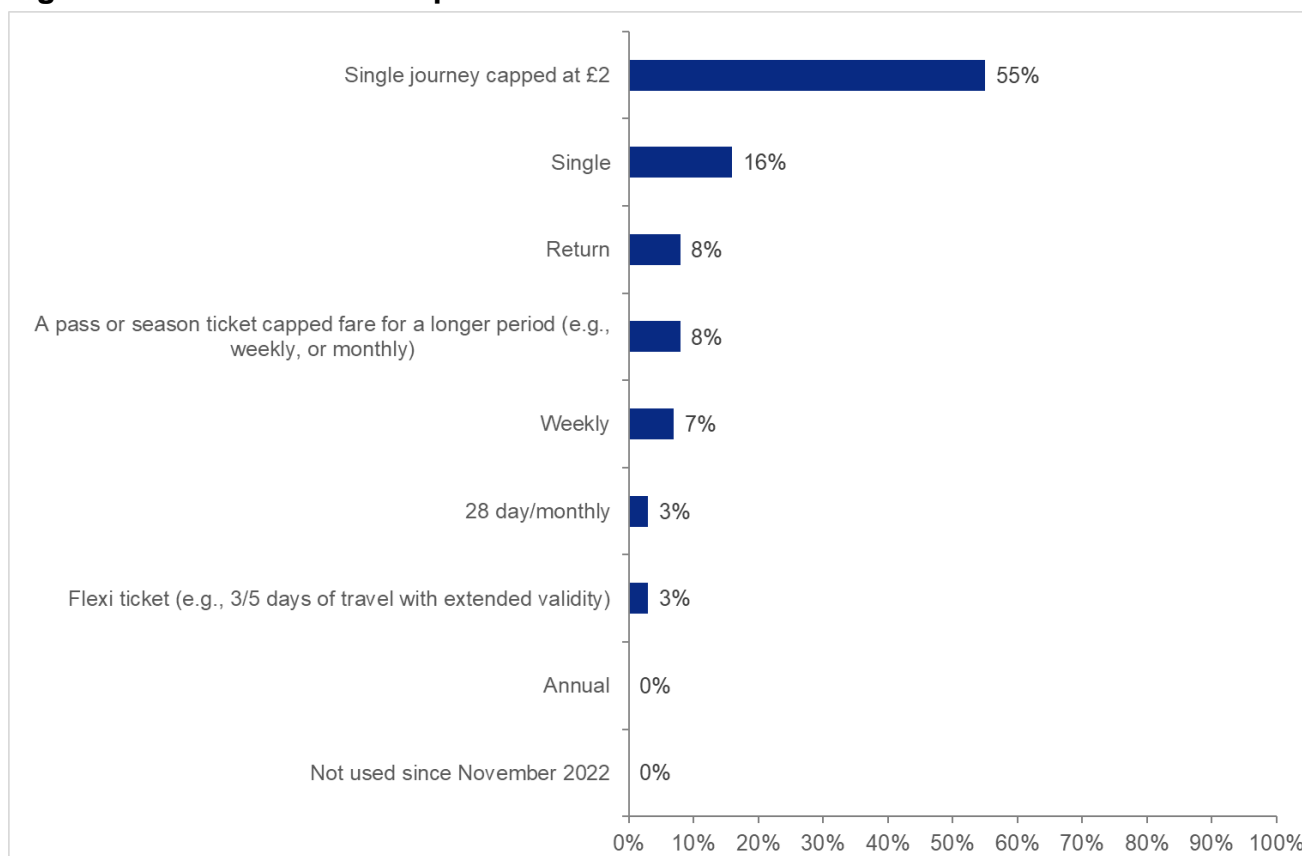
3.7.   55% of bus users, eligible for the £2 single fare cap[2], mostly use the single journey fare capped at £2.[3] 16% still purchase a standard single fare, 8% a return fare, while the remaining bus users purchase weekly, monthly, flexi or season tickets.

3.8.   Of those that do not opt for the single journey fare capped at £2, 23% said they are not fully aware of the fare and 10% said they were not made aware of the option at the point of purchase – these respondents represent a group that could be supported to utilise the capped fare. This group represents about 4% of all respondents and approximately 15% of all bus users eligible for the capped fare. This suggests increasing awareness of the fare cap could grow use to around two-thirds of all bus users.

3.9.   In addition, 21% said the fare works out more expensive than their usual ticket, 13% said it is still too expensive and 8% said the saving is minor, while 13% said it is easier to purchase their usual ticket and 5% have an existing season ticket – this group are less likely to utilise the capped fare on buses.

Figure 3.5: Use of £2 fare cap on buses

Number of respondents: 184.

Question: Since November 2022, what type of ticket have you used most often when travelling by bus? (Only asked to bus users eligible for a £2 single fare)

---

[2] Eligible in that they are not in receipt of a free travel pass (c32% of bus or tram users), who do not benefit from the fare cap.

[3] There may be some users that occasionally use the single journey fare cap, even if most of the time they use an alternative fare. Therefore, this is a minimum estimate of using the fare cap (this point applies to both bus and tram users).

Over half of eligible tram users tend to opt for a £2 single journey capped fare, with potential to grow this number to about three-quarters of all eligible tram users through increased awareness alone

3.10. 54% of tram users (eligible for the £2 single fare cap) mostly use the single journey fare capped at £2. 15% still purchase a standard single fare, 13% a return fare, while the remaining tram users purchase weekly, flexi or season tickets, or have not travelled on the tram since the introduction of the fare.

3.11. Of those that do not opt for the single journey fare capped at £2, 35% said they are not fully aware of the fare and 22% said they were not made aware of the option at the point of purchase – these respondents represent a group that could be supported to utilise the capped fare. This group represents about 4% of all respondents and approximately 25% of all tram users eligible for the capped fare. This suggests increasing awareness of the fare cap could grow use to some three-quarters of all tram users.

3.12. In addition, 8% said the fare works out more expensive than their usual ticket and 8% said the saving is minor, while 12% said it is easier to purchase their usual ticket – this group are less likely to utilise the capped fare on trams.

Figure 3.6: Use of £2 fare cap on trams
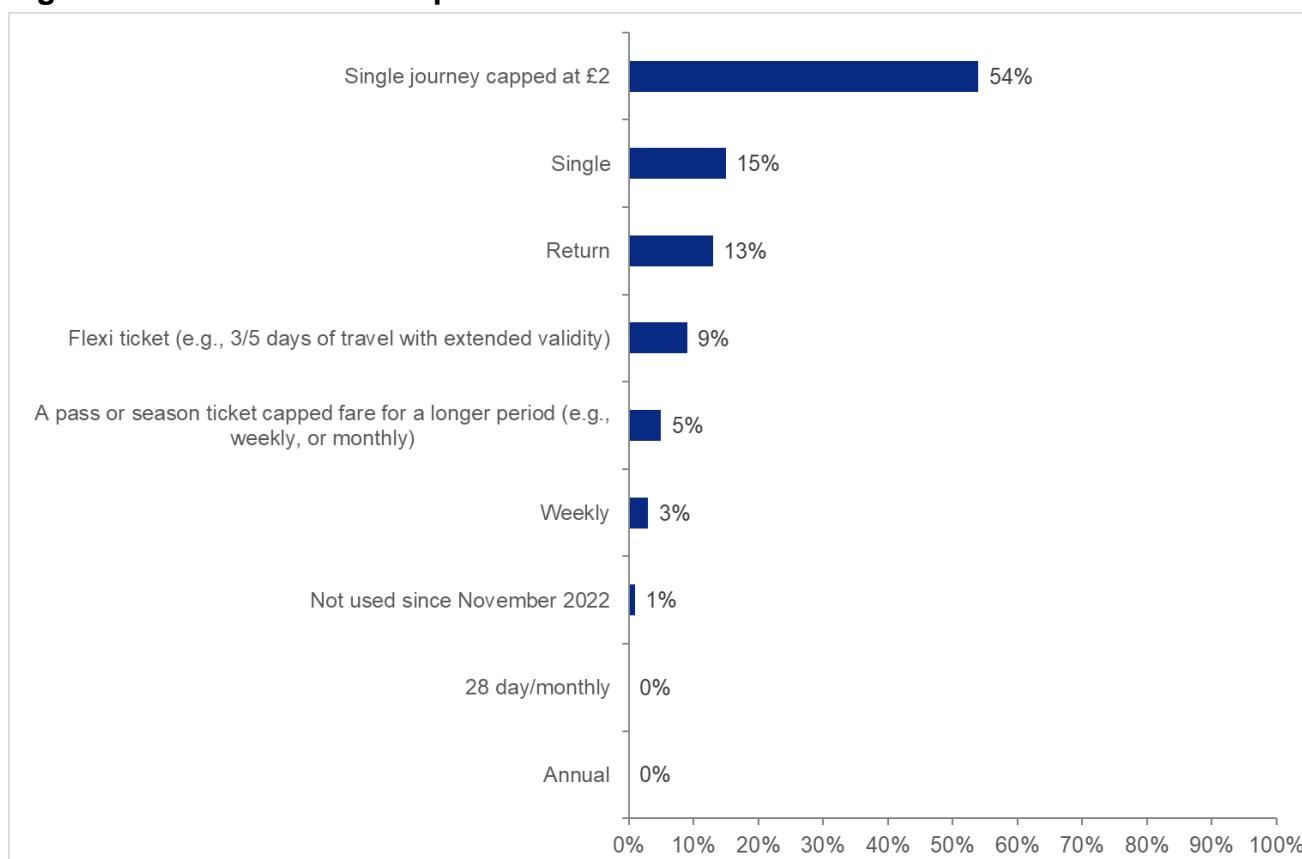
Number of respondents: 102.

Question: Since November 2022, what type of ticket have you used most often when travelling by tram? (Only asked to tram users eligible for a £2 single fare)

Savings using the fare cap

Eligible bus users that now opt for the £2 single journey fare are saving on average between 10p and 58p per journey, while eligible tram users are saving between 45p and £1.13 per journey

Bus users

3.13.   41% of eligible bus users that now mostly opt for the £2 single journey fare cap previously mainly travelled using a single fare with a range cost of £2 to £4 and an average cost of £2.58.

3.14.   22% of eligible bus users that now mostly opt for the £2 single journey fare cap previously mainly travelled using a return fare with a range cost of £2 to £5 and an average cost of £4.20 per return journey (or approximately £2.10 per single journey).

3.15.   A further 37% of eligible bus users that now mostly opt for the £2 single journey fare cap previously mainly travelled using flexi, weekly, monthly or season tickets (it is difficult to calculate the potential saving from such tickets as it is not clear how many journeys were made during the period of using these tickets).

Tram users

3.16.   51% of eligible tram users that now mostly opt for the £2 single journey fare cap previously mainly travelled using a single fare with a range cost of £2 to £4 and an average cost of £3.13.

3.17.   27% of eligible tram users that now mostly opt for the £2 single journey fare cap previously mainly travelled using a return fare with a range cost of £3 to £6 and an average cost of £4.90 per return journey (or approximately £2.45 per single journey).

3.18.   A further 17% of eligible tram users that now mostly opt for the £2 single journey fare cap previously mainly travelled using flexi, weekly, monthly or a season ticket (it is difficult to calculate the potential saving from such tickets as it is not clear how many journeys were made during the period of using these tickets).

3.19.   In addition, 3 respondents that now mostly use the £2 single journey fare cap previously did not use the tram.

**Across both bus and tram users, there are 15 out of 28 respondents that said they now make journeys by bus or tram that they previously made with other forms of transport and as a result of the £2 fare cap they have saved money (this represents about 2.5% of respondents). The savings made since the introduction of the fare range from £8 to £500 per person, with an average of £115 per person.**

Change in behaviour

There is a net increase in bus use amongst those that mostly opt for the £2 single fare cap for their journeys by bus and this likely translates into net increased bus journeys, while there has also been a shift away from other modes of transport to the bus amongst a small number of respondents that use the £2 fare cap

3.20.   There has been a net decrease of minus 5% in bus usage since November 2022 amongst bus users, with 18% stating bus use has increased and 23% stating it has decreased. This changes amongst those eligible bus users, especially those that have adopted the £2 fare cap for single journeys, with a net increase in bus use of +4% (25% increase and a 21% decrease).

Figure 3.7: Change in behaviour - buses
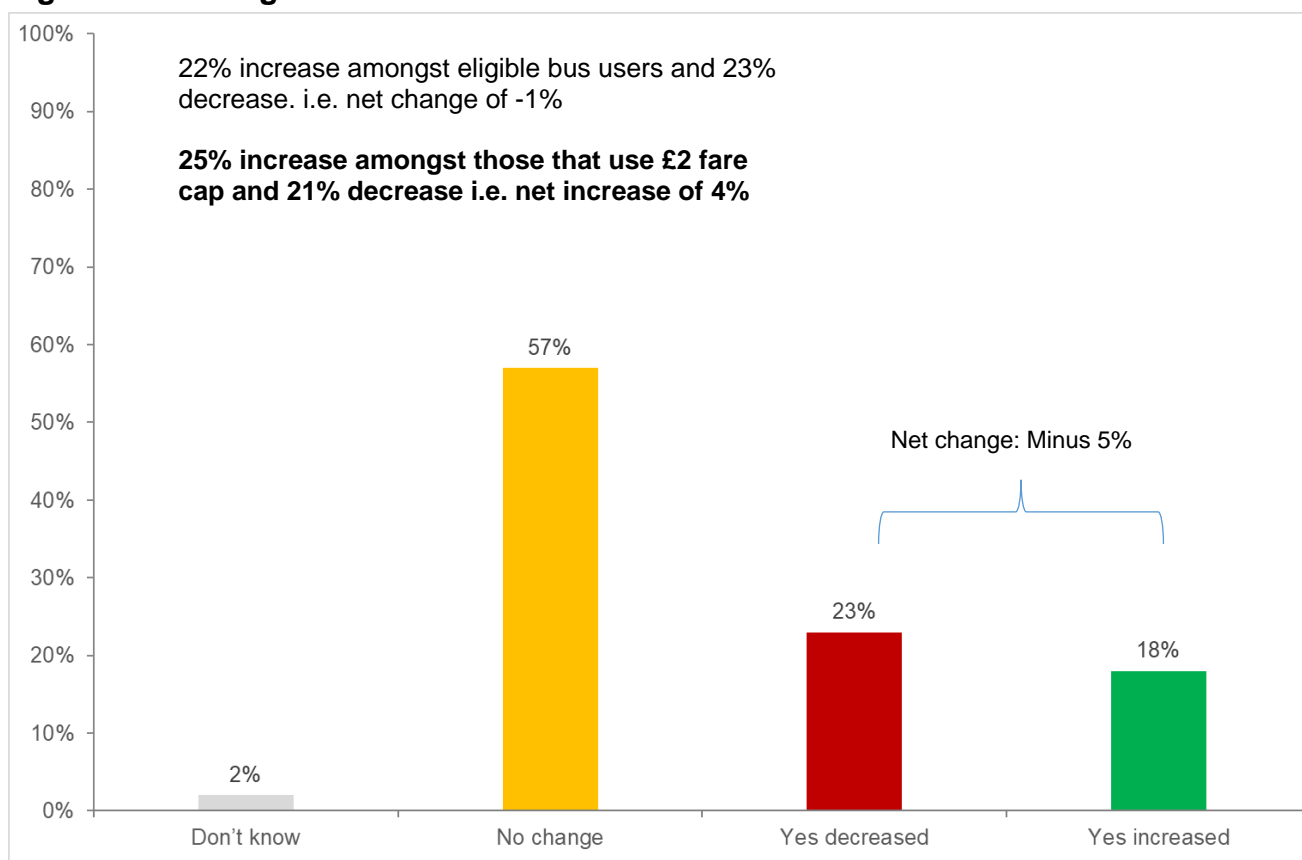
Number of respondents: 274.

Question: Since November 2022, has your level of bus travel changed? (Only asked to bus users)

3.21.   Of the bus users that have increased the number of journeys, there have been approximately 251 additional journeys per week at an average of 5.02 journeys per person per week (this does not take into account those that have decreased their bus use or not changed their behaviour and therefore does not represent the overall number of increased journeys – this comment applies to similar data in this survey).

3.22.   Of the eligible bus users that now mostly use the £2 fare cap and have increased the number of journeys, there are approximately 142 additional journeys per week at an average of 5.26 journeys per person per week. Equally, of these bus users that now mostly use the £2 fare cap and have increased their bus use, previously 5 were not bus users (c1% of respondents), 2 used the bus less often than once a month and 6 about once a month – all of which now use the bus at least once a fortnight.

3.23. Of those that have increased bus journeys, 13 of 50 said that these are new journeys they have been able to make due to the bus fare cap (this represents about 2% of respondents), 21 of 50 said these are journeys they would have made using a different type of transport had the £2 fare cap not been offered (representing about 3% of respondents) and 7 of 50 said some were journeys they wouldn't have made at all and some were journeys they would have made using a different type of transport (representing about 1% of respondents). The remainder did not know.

3.24. Of the 28 that said they would have made the journey using a different form of transport if the £2 fare cap was not available, 9 said they would have used a car/van as a driver, 1 as a passenger, 3 by taxi, 2 by tram and 13 would have used another form of transport (i.e. they are unsure what transport they would have used, but it would not have been by bus).

The main reasons for not increasing bus use are either that they would not benefit from the fare cap or that they do not want to travel more by bus, while service issues are also mentioned, along with lack of awareness of the fare cap

3.25.   22% said they have a free bus pass (and therefore do not benefit from the £2 bus fare cap) and 14% said they would not make any savings as a result of the bus cap. 11% said they use the bus as much as needed and similarly 10% said they prefer to make journeys in another way. These groups are unlikely/less likely to be encouraged to use the bus more as a result of the bus fare cap.

3.26.   8% cited a lack of awareness of the bus fare cap, which means an increase in awareness may increase bus use.

3.27.   Service issues were mentioned by a small but notable minority of respondents as reasons – 9% said the bus service does not go where they want and 7% said the bus service has been worse.

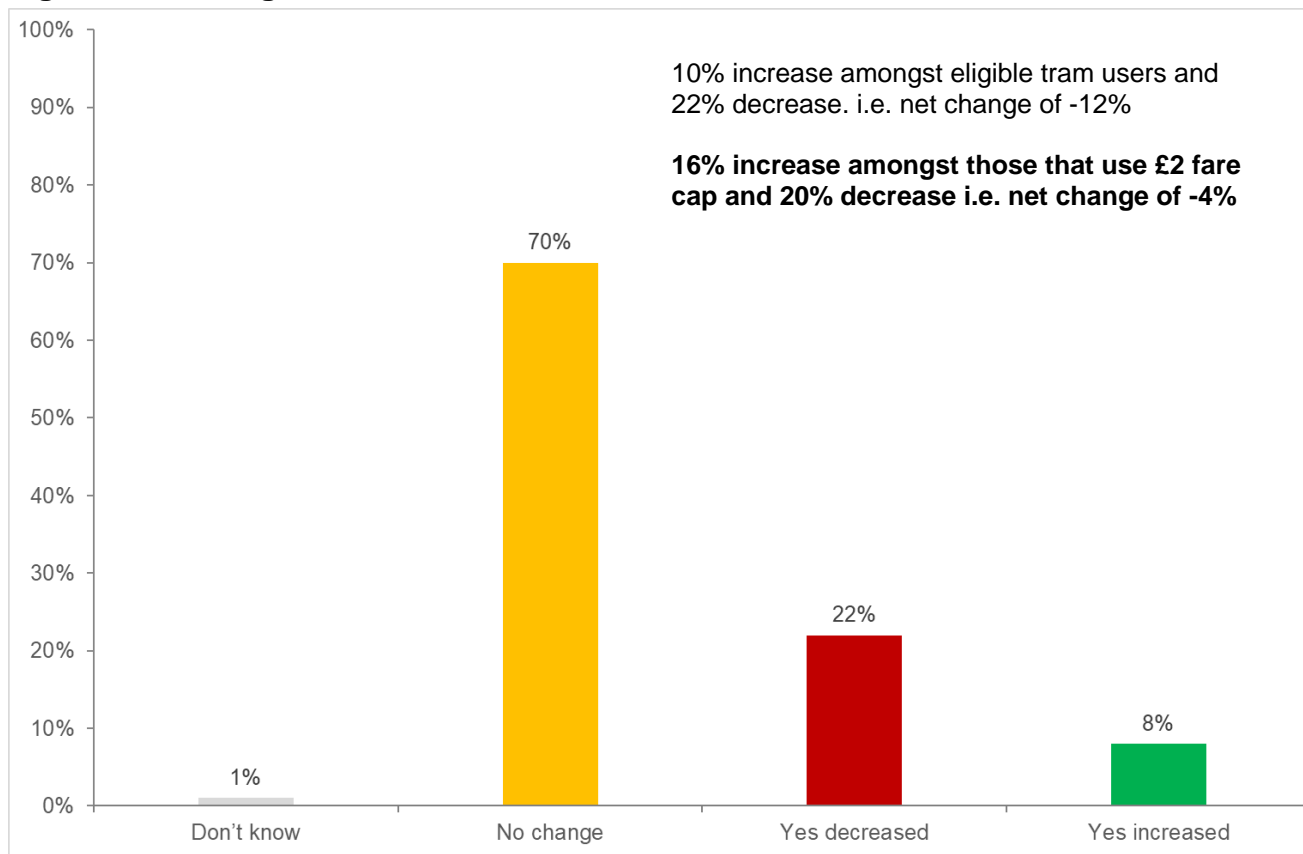**Figure 3.8: Reasons for not increasing bus use**
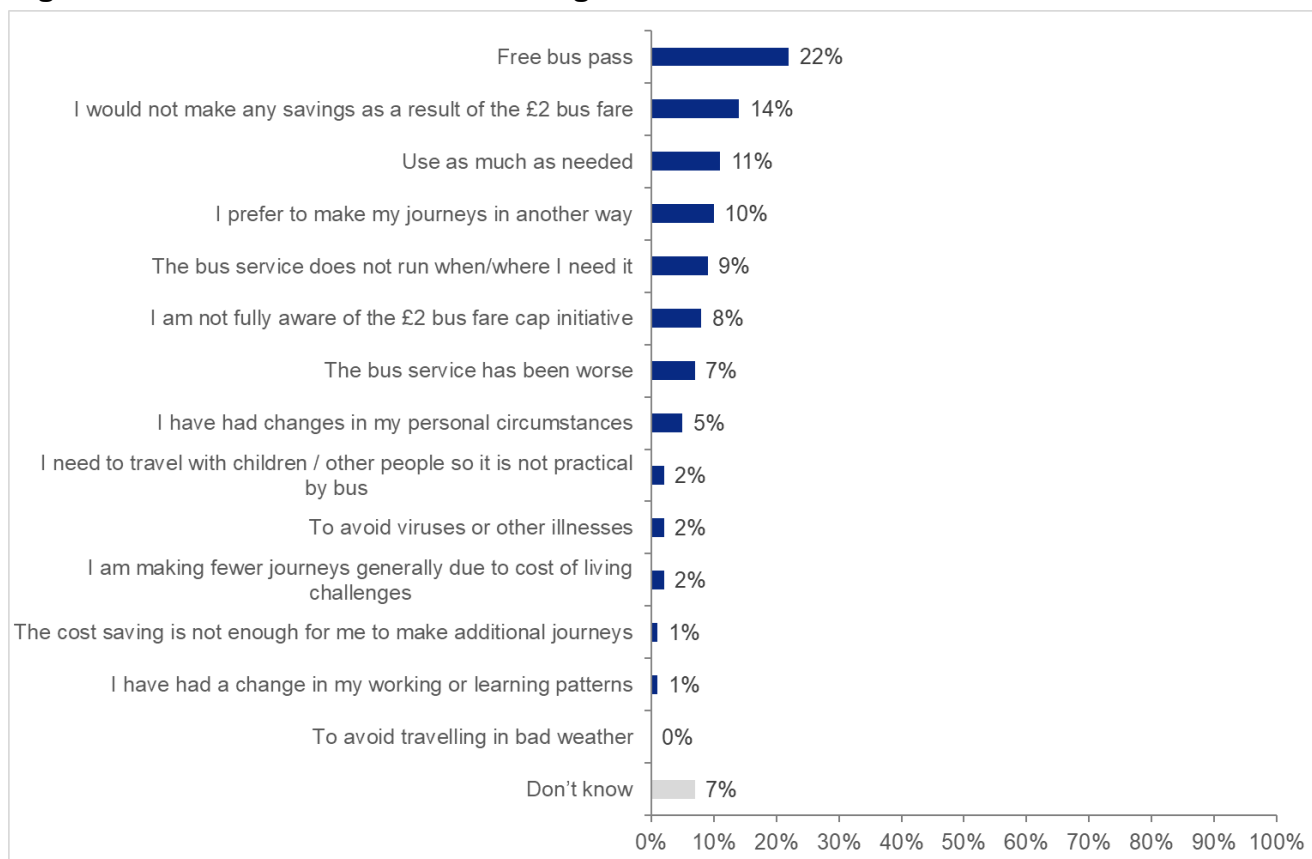
Number of respondents: 221.

Question: Why have you not undertaken more journeys by bus since the £2 fare cap for a single journey was introduced on 1st November 2022? (Only asked to bus users that have not increased bus use) (Respondents could select more than one answer)

Whilst there is a net decrease in tram usage, this decrease is less amongst those that mostly opt for the single journey fare cap

3.28. There has been a net decrease of minus 14% in tram usage since November 2022 amongst tram users, with 8% stating tram use has increased and 22% stating it has decreased. This gap reduces amongst those eligible tram users, especially those that have adopted the £2 fare cap for single journeys, with a net change in tram use of -4% (16% increase and a 20% decrease).

Figure 3.9: Change in behaviour - trams

10% increase amongst eligible tram users and 22% decrease. i.e. net change of -12%

16% increase amongst those that use £2 fare cap and 20% decrease i.e. net change of -4%

Number of respondents: 143.

Question: Since November 2022, has your level of tram travel changed? (Only asked to tram users)

3.29. Of the tram users that have increased the number of journeys, there have been approximately 16 additional journeys per week at an average of 1.5 journeys per person per week (this does not take into account those that have decreased their tram use or not changed their behaviour and therefore does not represent the overall number of increased journeys – this comment applies to similar data in this survey).

3.30. Of the eligible tram users that now mostly use the £2 fare cap and have increased the number of journeys, there are approximately 16 additional journeys per week at an average of 1.8 journeys per person per week. Equally, of these tram users that now mostly use the £2 fare cap and have increased their tram use, previously 2 were not tram users, 3 used the tram less often than once a month, 2 about once a month and 2 3-4 times a week – now 4 use the tram weekly, one fortnightly and 4 monthly.

3.31. Of those that have increased tram journeys, 5 of 11 said that these are new journeys they have been able to make due to the tram fare cap (this represents about 1% of respondents), 2 of 11 said these are journeys they would have made using a different type of transport had the £2 fare cap not been offered – representing 0.33% of respondents (the remainder did not know).

3.32. The two that said they would have made the journey using a different form of transport if the £2 fare cap was not available said they would have used a car/van as a driver.

The main reasons for not increasing tram use are either that they would not benefit from the fare cap or that they do not want to travel more by tram, while service issues are also mentioned, along with lack of awareness of the fare cap

3.33. 21% said they have a free travel pass (and therefore do not benefit from the £2 fare cap) and 11% said they would not make any savings as a result of the fare cap. 11% said they use the tram as much as needed and similarly 9% said they prefer to make journeys in another way. These groups are unlikely/less likely to be encouraged to use the tram more as a result of the fare cap.

3.34. 17% cited a lack of awareness of the fare cap, which means an increase in awareness may increase tram use.

3.35. Service issues were mentioned by a small but notable minority of respondents as reasons – 11% said the service does not go where they want and 3% said the service has been worse.

Figure 3.10: Reasons for not increasing tram use
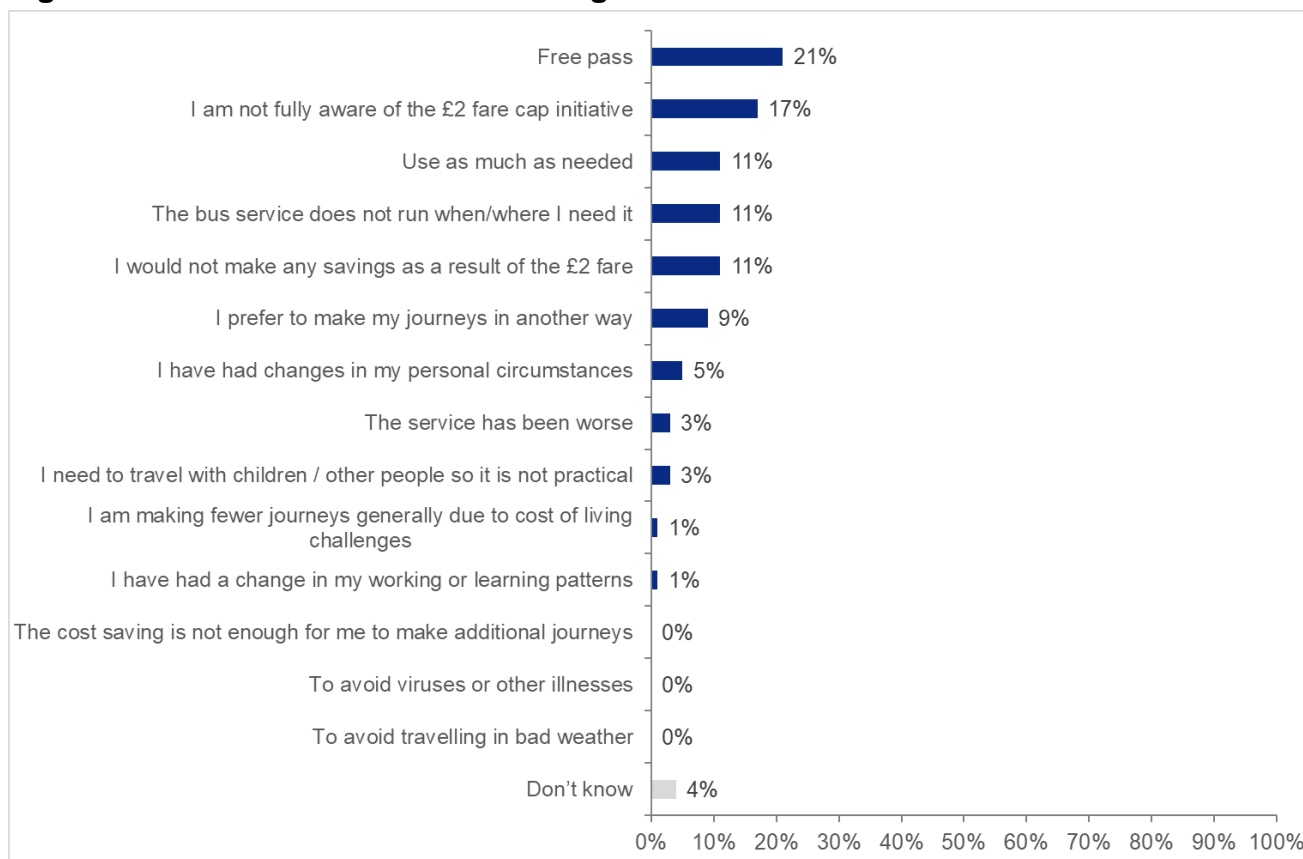
Number of respondents: 128.

Question: Why have you not undertaken more journeys by tram since the £2 fare cap for a single journey was introduced on 1st November 2022? (Only asked to tram users that have not increased tram use) (Respondents could select more than one answer)

Impact on quality of life and access to services

The fare cap has had a perceived net positive impact on bus and/or tram users across all indicators

3.36. Across all indicators, there is a net positive impact of the fare cap on bus and/or tram users, including on frequency of travel, access to education, employment opportunities, access to leisure and recreation, and cost of living. For example, on average, across all the indicators, there is a net positive impact amongst bus and/or tram users of +15%.

3.37. Unemployed respondents (that are bus users) are even more positive about finding a job, with a net positive impact of +17%, compared to a net positive impact of +7% amongst those in employment (that are bus users). Similarly, unemployed respondents (that are bus users) are also more positive about access to education with a net positive impact of +14%, compared to net positive impact of +9% amongst those in employment that are bus users.

Figure 3.11: Impact on quality of life and access to services of the fare cap
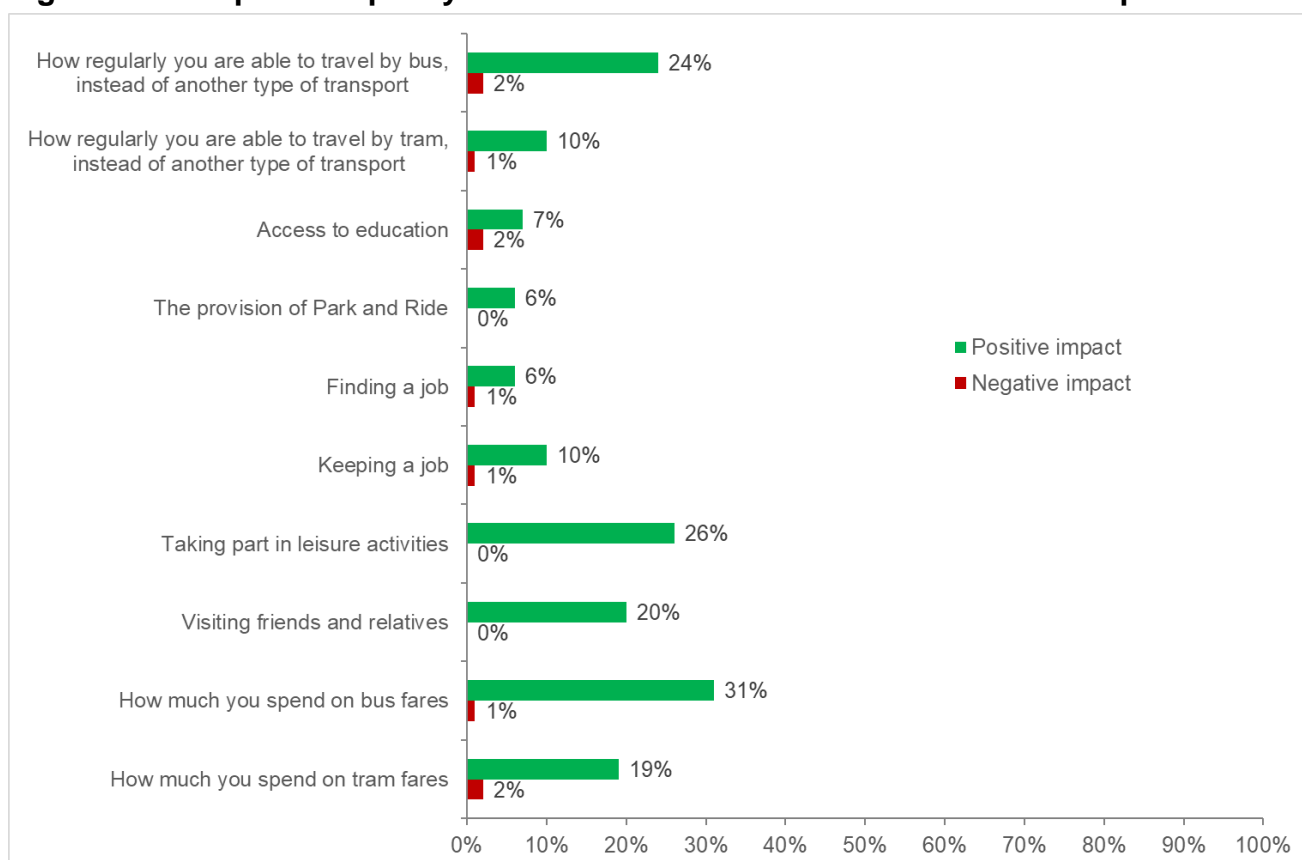
Number of respondents: 308 (asked to all respondents, but results only show those that are bus and/or tram users).

Question: To what extent, if at all, does a £2 fare cap for single bus or tram journey have an impact on the following?

Overall perceptions of the fare cap

The bus fare cap has increased satisfaction with bus services, especially amongst bus users and those eligible for the fare cap

3.38. Overall, respondents are more likely to say they are now more satisfied with bus services as a result of the fare cap, than are less satisfied – 18% are at least slightly more satisfied compared with 1% slightly less satisfied.

3.39. Bus users are more satisfied – 32% are at least slightly more satisfied with bus services compared with 2% that are less satisfied. This increases to 47% that are at least slightly more satisfied amongst those bus users eligible for the fare cap (and 1% slightly less satisfied).

3.40. Women (22% more satisfied and 2% less satisfied) are also more satisfied than men (14% more satisfied and 1% less satisfied). Likewise, those without access to a car etc (33% more satisfied and 1% less satisfied) are more satisfied than those with access (12% more satisfied and 2% less satisfied).

Figure 3.12: Satisfaction with the fare cap by district
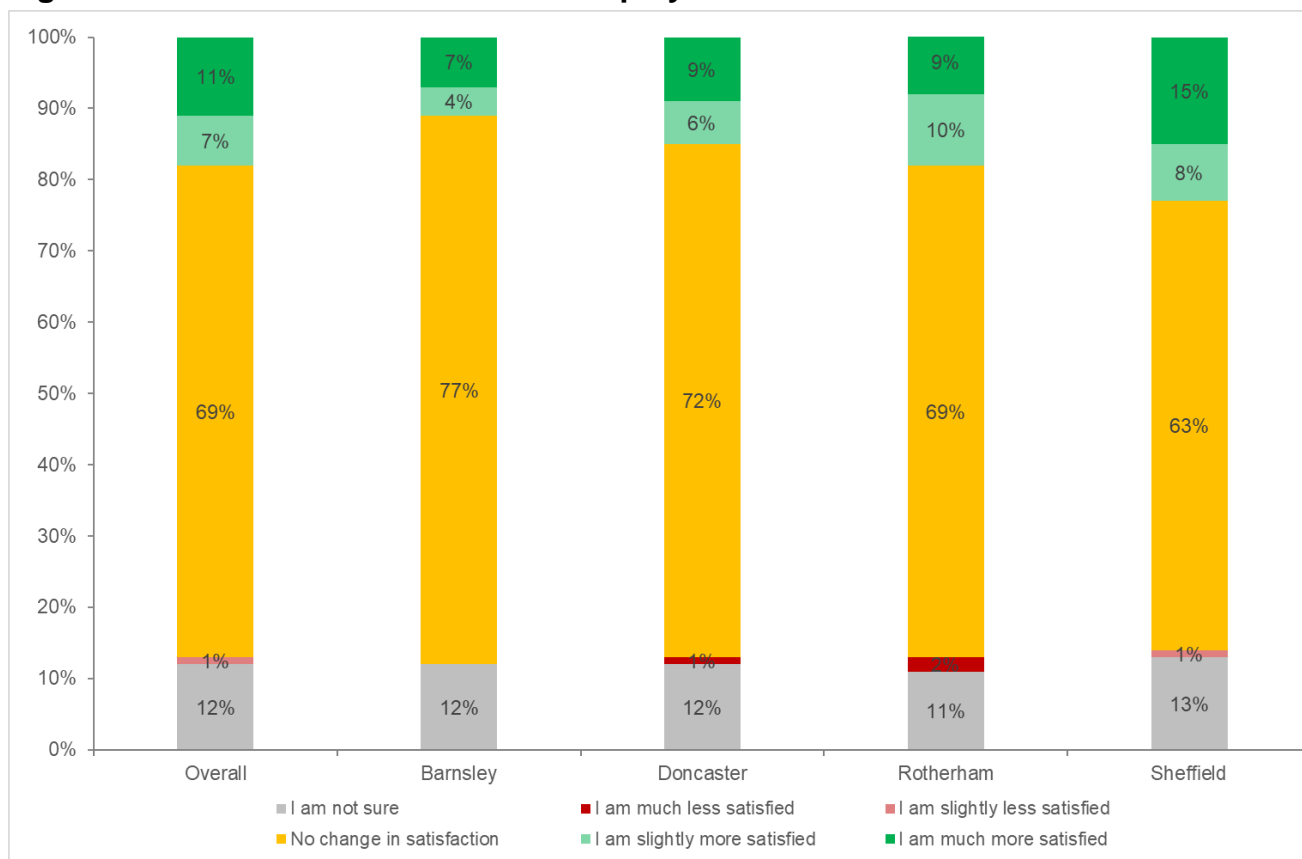
Number of respondents: 607.

Question: To what extent, if at all, has the £2 fare cap for single bus journeys changed your views on travelling by bus?

Appendix: Questionnaire

South Yorkshire £2 Single Fare Survey Bus and Tram: Questionnaire

Section 1: Initial demographic questions

Q1. Which South Yorkshire district do you live in? Note to interviewer: If required, read out response options to prompt the respondent and Select one answer only.
- ❑ Barnsley
- ❑ Doncaster
- ❑ Rotherham
- ❑ Sheffield

Q2. How old are you? Note to interviewer: If required, read out response options to prompt the respondent and Select one answer only.
- ❑ 16-17
- ❑ 18-24
- ❑ 25-34
- ❑ 35-44
- ❑ 45-54
- ❑ 55-59
- ❑ 60-64
- ❑ 65-74
- ❑ 75+

Q3. With which gender do you identify? Note to interviewer: Ask unprompted, clarify if required and select one answer only.
- ❑ Male
- ❑ Female

Q4. What is your current employment status? Note to interviewer: Ask unprompted, clarify if required and select one answer only - Please tick the main one only, i.e. the one which they spend most time doing
- ❑ Employee in full time job (30 hours+)
- ❑ Employee in part time job (under 16-30 hours)
- ❑ Employee in part time job (less than 16 hours)
- ❑ Self-employed, full, or part time
- ❑ Unpaid work, including regular voluntary work/work experience
- ❑ On a training/apprenticeship programme
- ❑ Full time education at school/college/ university
- ❑ Unemployed and available for work
- ❑ Unemployed and not available for work due to temporary sickness
- ❑ Permanently sick/disabled
- ❑ Wholly retired from work
- ❑ Looking after the home
- ❑ Doing something else

Q5. Which of the following best describes the area you live in? Note to interviewer: Read out response options and select one answer only.
- ❑ Inner city area
- ❑ Suburban city area
- ❑ Town
- ❑ Village
- ❑ Rural
- ❑ Prefer not to say

Section 2: Travel behaviour

Q6. Thinking about the journeys you undertake in a <u>typical week</u>, which type of transport do you use <u>most often</u>? Note to interviewer: Ask unprompted and select one answer only.
- ❑ Car or van as a driver
- ❑ Car or van as a passenger
- ❑ Bus
- ❑ Train
- ❑ Tram
- ❑ Foot
- ❑ Bicycle
- ❑ Motorbike/moped
- ❑ Taxi or private hire vehicle
- ❑ Flexible transport services e,g. bookable bus service
- ❑ Another type of transport

If 'another type of transport', please specify:

_____

Q7. What is the main purpose for your journeys? If you travel by for more than one purpose, please think about the journey you undertake most often. Note to interviewer: Ask unprompted and select one answer only.
- ❑ Travelling to/from place of work
- ❑ Travelling to/from place of education e.g., school, college, or university
- ❑ Travel for school drop off/pick up
- ❑ Go shopping
- ❑ Visit friends/relatives
- ❑ Travelling to leisure destinations (e.g., cinema)
- ❑ Travel as part of my work
- ❑ Travel for other [personal business (e.g., Doctor's appointment)

If 'any other purpose', please specify:

_____

Q8. How often do you travel by <u>each</u> of the following forms of transport? Note to interviewer: Read out response options and select one answer for each row.

	5+ days a week	3-4 days a week	1-2 days a week	Once a fortnight	About once a month	Less often than once a month, but within the last year	More than a year ago	Never	Don't know/NA
Bus	❑	❑	❑	❑	❑	❑	❑	❑	❑
Tram	❑	❑	❑	❑	❑	❑	❑	❑	❑

Q9.a <u>Ask to bus users that travel at least once a year (this is automated):</u> **What are your <u>top three</u> <u>reasons</u> for travelling by bus, rather than another type of transport?** Note to interviewer: Ask unprompted and select up to three responses.
- ❑ Speed of journey
- ❑ Reliability of journey
- ❑ Distance to destination
- ❑ Free or low-cost
- ❑ Physical comfort
- ❑ Personal safety
- ❑ I have a disability that means I need to travel this way
- ❑ Concerns for Covid-19
- ❑ Complexity of journey using alternative mode (e.g., number of connections)
- ❑ No alternative options are available
- ❑ I do not have adequate information on the other types of transport available for this journey
- ❑ Operating hours suit my needs
- ❑ Ability to do other things while travelling (e.g., work/read/etc)
- ❑ Frequency of service
- ❑ Services are close to where I live / go where I want to get to
- ❑ Real-time information is available
- ❑ More environmentally friendly/sustainable
- ❑ Any other reason

If 'any other reason', please specify:
_____

Q9.b <u>Ask to tram users that travel at least once a year (this is automated):</u> **What are your <u>top three</u> <u>reasons</u> for travelling by tram, rather than another type of transport?** Note to interviewer: Ask unprompted and select up to three responses.

- ❑ Speed of journey
- ❑ Reliability of journey
- ❑ Distance to destination
- ❑ Free or low-cost
- ❑ Physical comfort
- ❑ Personal safety
- ❑ I have a disability that means I need to travel this way
- ❑ Concerns for Covid-19
- ❑ Complexity of journey using alternative mode (e.g., number of connections)
- ❑ No alternative options are available
- ❑ I do not have adequate information on the other types of transport available for this journey
- ❑ Operating hours suit my needs
- ❑ Ability to do other things while travelling (e.g., work/read/etc)
- ❑ Frequency of service
- ❑ Services are close to where I live / go where I want to get to
- ❑ Real-time information is available
- ❑ More environmentally friendly/sustainable
- ❑ Any other reason

If 'any other reason', please specify:

_____

Q9.c <u>Ask to all:</u> **What if anything stops you from using the bus at all or as much as you may like?** Note to interviewer: Ask unprompted and select all relevant answers.

- ❑ Cost / too expensive
- ❑ Reliability of journey
- ❑ Do not know where or when services run
- ❑ Poor information whilst travelling
- ❑ Reliability of services
- ❑ Frequency of services
- ❑ Services do not run where I need them
- ❑ Operating hours
- ❑ It is not a direct service
- ❑ Journey duration
- ❑ Overcrowded
- ❑ No seats available
- ❑ Personal comfort during journeys
- ❑ Personal safety during journeys
- ❑ Lack of / poor condition of bus shelter
- ❑ Dirty vehicles
- ❑ No / poor Wi-Fi
- ❑ Temperature control
- ❑ I am unable to use buses due to disability or health condition
- ❑ Lack of facilities to charge equipment
- ❑ Difficulties with wheelchair access
- ❑ Difficulties with pushchair access
- ❑ Covid-19 concerns
- ❑ Prefer to drive
- ❑ Other

If 'Other', please specify:

_____

Q9.d <u>Ask to all:</u> **What if anything stops you from using the tram at all or as much as you may like?** Note to interviewer: Ask unprompted and select all relevant answers.

- ❑ Cost / too expensive
- ❑ Reliability of journey
- ❑ Do not know where or when services run
- ❑ Poor information whilst travelling
- ❑ Reliability of services
- ❑ Frequency of services
- ❑ Services do not run where I need them
- ❑ Operating hours
- ❑ It is not a direct service
- ❑ Journey duration
- ❑ Overcrowded
- ❑ No seats available
- ❑ Personal comfort during journeys
- ❑ Personal safety during journeys
- ❑ Lack of / poor condition of tram stop
- ❑ Dirty vehicles
- ❑ No / poor Wi-Fi
- ❑ Temperature control
- ❑ I am unable to use buses due to disability or health condition
- ❑ Lack of facilitaties to charge equipment
- ❑ Difficulties with wheelchair access
- ❑ Difficulties with pushchair access
- ❑ Covid-19 concerns
- ❑ Prefer to drive
- ❑ No tram nearby
- ❑ Other

If 'Other', please specify:

_____

Section 3: £2 fare cap

Q10. **Are you aware of the <u>bus</u> ticket initiative in place since 1st November that caps the price**
a **you pay for a single bus or tram journey to a maximum of £2?** Note to interviewer: Read out response options and select one answer for each form of transport.

- ❑ Not at all aware
- ❑ Somewhat aware
- ❑ Fully aware

Q10. **Are you aware of the <u>tram</u> ticket initiative in place since 1st November that caps the price**
b **you pay for a single bus or tram journey to a maximum of £2?** Note to interviewer: Read out response options and select one answer for each form of transport.

- ❑ Not at all aware
- ❑ Somewhat aware
- ❑ Fully aware

Q11. <u>Ask to bus users that are aware (this is automated):</u> **How did you find out about the £2 fare**
a **cap initiative for a single bus journey?** Note to interviewer: Ask unprompted and select all
relevant responses.

- ❏ I saw promotional posters / leaflets
- ❏ I saw a promotional tv advert
- ❏ I saw the information on Gov.uk
- ❏ Convenience of the journey
- ❏ I saw an advert or article on Traveline
- ❏ I saw an online advert somewhere else
- ❏ From my friends
- ❏ From my family
- ❏ On the local news
- ❏ On national news
- ❏ From a bus driver/tram conductor
- ❏ From a direct email
- ❏ On social media
- ❏ On the radio
- ❏ The Government "Help for Households" campaign
- ❏ Other
- ❏ Don't know

If 'Other', please specify:

_____

Q11. <u>Ask to tram users that are aware (this is automated):</u> **How did you find out about the £2 fare**
b **cap initiative for a single tram journey?** Note to interviewer: Ask unprompted and select all
relevant responses.

- ❏ I saw promotional posters / leaflets
- ❏ I saw a promotional tv advert
- ❏ I saw the information on Gov.uk
- ❏ Convenience of the journey
- ❏ I saw an advert or article on Traveline
- ❏ I saw an online advert somewhere else
- ❏ From my friends
- ❏ From my family
- ❏ On the local news
- ❏ On national news
- ❏ From a bus driver/tram conductor
- ❏ From a direct email
- ❏ On social media
- ❏ On the radio
- ❏ The Government "Help for Households" campaign
- ❏ Other
- ❏ Don't know

If 'Other', please specify:

_____

Q12. <u>Ask to bus and tram users (this is automated):</u> **Thinking of tickets you use to travel, what type of passenger are you?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Adult fare payer (route Q13)
- ❑ Concessionary traveller with a 16-18 student pass (Zoom pass for bus and tram) (route Q13)
- ❑ Concessionary traveller with an 18-21 student pass (Zoom Beyond for bus and train) (route Q13)
- ❑ Travel for free with a ENCTS elderly pass (state pensioner) (route Q15)
- ❑ Travel for free with a ENCTS disabled pass (based on meeting disability criteria) (route Q15)
- ❑ Travel for free with a complimentary pass (route Q15)
- ❑ Other (route Q13)

If 'Other', please specify:

_____

Q13. <u>Ask to bus users based on Q12 response (this is automated):</u> **Since November 2022, what**
a **type of ticket have you <u>used most often</u> when travelling by bus?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Single
- ❑ Single journey capped at £2
- ❑ Return
- ❑ Flexi ticket (e.g., 3/5 days of travel with extended validity)
- ❑ A pass or season ticket capped fare for a longer period (e.g., weekly, or monthly)
- ❑ Weekly
- ❑ 28 day/monthly
- ❑ Annual
- ❑ Not used since November 2022

Q13. <u>Ask to tram users based on Q12 response (this is automated):</u> **Since November 2022, what**
b **type of ticket have you <u>used most often</u> when travelling by tram?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Single
- ❑ Single journey capped at £2
- ❑ Return
- ❑ Flexi ticket (e.g., 3/5 days of travel with extended validity)
- ❑ A pass or season ticket capped fare for a longer period (e.g., weekly, or monthly)
- ❑ Weekly
- ❑ 28 day/monthly
- ❑ Annual
- ❑ Not used since November 2022

Q14. Ask to bus users that have not used the fare cap (this is automated): **Why have you not paid**
a **for £2 fare cap for a single bus journey for most of your journeys?** Note to interviewer: Ask
unprompted and select all relevant answers.
- ❑ I have not travelled by bus/tram since the 1st of November 2022, but did travel by bus/tram occasionally before this date
- ❑ I have only used bus/tram services that do not offer the £2 fare cap initiative
- ❑ I never travel by bus/tram
- ❑ I am not fully aware of the £2 fare cap initiative
- ❑ I was not made aware of the £2 fare cap at point of purchase and so I bought a different type of ticket
- ❑ I have an existing season ticket
- ❑ The £2 bus fare cap is more expensive than my usual ticket
- ❑ The cost saving from the £2 fare cap is minor
- ❑ The £2 bus fare cap is still too expensive
- ❑ It is easier to purchase my usual bus ticket
- ❑ I have used my free travel pass for bus journeys since 1st November 2022
- ❑ The length of the scheme (1st Nov – 31st June) means it is not worth my while
- ❑ Other

If 'Other', please specify:

_____

Q14. Ask to tram users that have not used the fare cap (this is automated): **Why have you not paid**
b **for £2 fare cap for a single tram journey for most of your journeys?** Note to interviewer: Ask
unprompted and select all relevant answers.
- ❑ I have not travelled by bus/tram since the 1st of November 2022, but did travel by bus/tram occasionally before this date
- ❑ I have only used bus/tram services that do not offer the £2 fare cap initiative
- ❑ I never travel by bus/tram
- ❑ I am not fully aware of the £2 fare cap initiative
- ❑ I was not made aware of the £2 fare cap at point of purchase and so I bought a different type of ticket
- ❑ I have an existing season ticket
- ❑ The £2 bus fare cap is more expensive than my usual ticket
- ❑ The cost saving from the £2 fare cap is minor
- ❑ The £2 bus fare cap is still too expensive
- ❑ It is easier to purchase my usual bus ticket
- ❑ I have used my free travel pass for bus journeys since 1st November 2022
- ❑ The length of the scheme (1st Nov – 31st June) means it is not worth my while
- ❑ Other

If 'Other', please specify:

_____

Q15. a Ask to bus users (this is automated): **Before November 2022 what type of ticket did you use most often when travelling by bus?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Single
- ❑ Return
- ❑ Flexi ticket (e.g., 3/5 days of travel with extended validity)
- ❑ A pass or season ticket capped fare for a longer period (e.g., weekly, or monthly)
- ❑ Weekly
- ❑ 28 day/monthly
- ❑ Annual
- ❑ Not used before November 2022

Q15. a1 **Approximately, what was the cost of this bus ticket?** (Write in numerical format)

_____

Q15. b Ask to tram users (this is automated): **Before November 2022 what type of ticket did you use most often when travelling by tram?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Single
- ❑ Return
- ❑ Flexi ticket (e.g., 3/5 days of travel with extended validity)
- ❑ A pass or season ticket capped fare for a longer period (e.g., weekly, or monthly)
- ❑ Weekly
- ❑ 28 day/monthly
- ❑ Annual
- ❑ Not used before November 2022

Q15. b1 **Approximately, what was the cost of this tram ticket?** (Write in numerical format)

_____

Q16. a Ask to bus users (this is automated): **Since November 2022, has your level of bus travel changed?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Yes increased
- ❑ Yes decreased
- ❑ No
- ❑ Don't know

Q16. b Ask to tram users (this is automated): **Since November 2022, has your level of tram travel changed?** Note to interviewer: Prompt and clarify as required, and select one answer only.
- ❑ Yes increased
- ❑ Yes decreased
- ❑ No
- ❑ Don't know

Q17. a Ask to bus users that have increased or decreased their bus travel (this is automated): **How often did you travel by bus before November 2022?** Note to interviewer: Read out response options and select one answer only.

- ❑ 5+ days a week
- ❑ 3-4 days a week
- ❑ 1-2 days a week
- ❑ Once a fortnight
- ❑ About once a month
- ❑ Less often than once a month but within the last year
- ❑ More than a year ago
- ❑ Never
- ❑ Don't know/NA

Q17. a1 **You said you undertake more journeys by bus since November 2022, compared to before. Approximately, how many more bus journeys do you make each week?** (Write in numerical format) (if undertake more bus journeys, but less than once a week - just state 0).

_____

Q17. a2 Ask to bus users that have increased their bus travel (this is automated): **Thinking about the additional bus journeys you undertake since the launch of the £2 fare cap for a single journey (in November 2022); are these…?** Note to interviewer: Read out response options and select one answer only.

- ❑ Journeys **I wouldn't have made** at all had the £2 fare cap not been offered
- ❑ Journeys **I would have made** using a different type of transport had the £2 fare cap not been offered
- ❑ **Some** were journeys I wouldn't have made at all and **some** were journeys I would have made using a different type of transport
- ❑ Don't know

Q17. a3 Ask to bus users that have made new bus journeys instead of using alternative forms of transport (this is automated): **If the £2 fare cap for bus travel had not been offered, what type of transport would you most likely have used for these journeys?** Note to interviewer: Ask unprompted and select one answer only.

- ❑ Car or van, as a driver
- ❑ Car or van, as a passenger
- ❑ Train
- ❑ Bicycle
- ❑ Motorbike / moped
- ❑ Taxi or private hire vehicle
- ❑ Tram
- ❑ Bus
- ❑ Scooter/E-Scooter
- ❑ Dial-a-ride bus services
- ❑ Another type of transport

Q17. b <u>Ask to tram users that have increased or decreased their tram travel (this is automated):</u> **How often did you travel by tram <u>before November 2022</u>?** Note to interviewer: Read out response options and select one answer only.
- ❑ 5+ days a week
- ❑ 3-4 days a week
- ❑ 1-2 days a week
- ❑ Once a fortnight
- ❑ About once a month
- ❑ Less often than once a month but within the last year
- ❑ More than a year ago
- ❑ Never
- ❑ Don't know/NA

Q17. b1 **You said you undertake <u>more journeys by tram since November 2022, compared to before</u>. Approximately, how many more tram journeys do you make each week?** (Write in numerical format) (if undertake more tram journeys, but less than once a week - just state 0).

_____

Q17. b2 <u>Ask to tram users that have increased their tram travel (this is automated):</u> **Thinking about the additional tram journeys you undertake since the launch of the £2 fare cap for a single journey (in November 2022); are these…?** Note to interviewer: Read out response options and select one answer only.
- ❑ Journeys **I wouldn't have made** at all had the £2 fare cap not been offered
- ❑ Journeys **I would have made** using a different type of transport had the £2 fare cap not been offered
- ❑ **Some** were journeys I wouldn't have made at all and **some** were journeys I would have made using a different type of transport
- ❑ Don't know

Q17. b3 <u>Ask to tram users that have made new tram journeys (this is automated):</u> **If the £2 fare cap for tram travel had not been offered, what type of transport would you most likely have used for these journeys?** Note to interviewer: Ask unprompted and select one answer only.
- ❑ Car or van, as a driver
- ❑ Car or van, as a passenger
- ❑ Train
- ❑ Bicycle
- ❑ Motorbike / moped
- ❑ Taxi or private hire vehicle
- ❑ Tram
- ❑ Bus
- ❑ Scooter/E-Scooter
- ❑ Dial-a-ride bus services
- ❑ Another type of transport

Q18. **You said you now make journeys by bus or tram that you previously made with other**
a **forms of transport. As a result of the £2 fare cap, what financial impact, if any, has changing to bus or tram had on you?** Note to interviewer: Prompt and clarify if required, and select one answer only.
- ❑ I have saved money on my travel costs
- ❑ I have not saved money on my travel costs
- ❑ I am not sure if I have saved money on my travel costs

Q18. **If you have saved money, please can you tell us approximately how much you have**
a1 **saved overall from the fare cap? If you are unsure, please provide your best guess.** Write in numerical value. If don't know, leave blank.

_____

Q19. Ask to bus users that have not increased journeys (this is automated): **Why have you not**
a **undertaken more journeys by bus since the £2 fare cap for a single journey was introduced on 1st November 2022?** Note to interviewer: Ask unprompted and select all relevant answers.
- ❑ I am not fully aware of the £2 bus fare cap initiative
- ❑ I have had a change in my working or learning patterns
- ❑ I have had changes in my personal circumstances
- ❑ I am making fewer journeys generally due to cost of living challenges
- ❑ To avoid travelling in bad weather
- ❑ To avoid viruses or other illnesses
- ❑ The bus service has been worse
- ❑ The bus service does not run when/where I need it
- ❑ The cost saving is not enough for me to make additional journeys
- ❑ I would not make any savings as a result of the £2 bus fare
- ❑ I prefer to make my journeys in another way
- ❑ I need to travel with children / other people so it is not practical by bus
- ❑ Use as much as needed
- ❑ Free bus pass
- ❑ Other
- ❑ Don't know

If 'Other', please specify:
_____

Q19. Ask to tram users that have not increased journeys (this is automated): **Why have you not**
b **undertaken more journeys by tram since the £2 fare cap for a single journey was**
introduced on 1st November 2022? Note to interviewer: Ask unprompted and select all relevant answers.

- ❑   I am not fully aware of the £2 fare cap initiative
- ❑   I have had a change in my working or learning patterns
- ❑   I have had changes in my personal circumstances
- ❑   I am making fewer journeys generally due to cost of living challenges
- ❑   To avoid travelling in bad weather
- ❑   To avoid viruses or other illnesses
- ❑   The service has been worse
- ❑   The service does not run when/where I need it
- ❑   The cost saving is not enough for me to make additional journeys
- ❑   I would not make any savings as a result of the £2 fare
- ❑   I prefer to make my journeys in another way
- ❑   I need to travel with children / other people so it is not practical
- ❑   Use as much as needed
- ❑   Free pass
- ❑   Other
- ❑   Don't know

If 'Other', please specify:

_____

Q20. Ask to all: **To what extent, if at all, does a £2 fare cap for single bus or tram journey have an impact on the following?** Note to interviewer: Read out each row and select one answer only for each.

	Very negative impact	Negative impact	No impact	Positive impact	Very positive impact	Don't know/NA
How regularly you are able to travel by bus, instead of another type of transport	❑	❑	❑	❑	❑	❑
How regularly you are able to travel by tram, instead of another type of transport	❑	❑	❑	❑	❑	❑
Access to education	❑	❑	❑	❑	❑	❑
The provision of Park and Ride	❑	❑	❑	❑	❑	❑
Finding a job	❑	❑	❑	❑	❑	❑
Keeping a job	❑	❑	❑	❑	❑	❑
Taking part in leisure activities	❑	❑	❑	❑	❑	❑
Visiting friends and relatives	❑	❑	❑	❑	❑	❑
How much you spend on bus fares	❑	❑	❑	❑	❑	❑
How much you spend on tram fares	❑	❑	❑	❑	❑	❑

Q21. To what extent, if at all, has the £2 fare cap for single bus journeys changed your views on travelling by bus? Note to interviewer: Read out response options and select one answer only.
- ❑ I am much less satisfied
- ❑ I am slightly less satisfied
- ❑ No change in satisfaction
- ❑ I am slightly more satisfied
- ❑ I am much more satisfied
- ❑ I am not sure

Section 4: About you

Note to interviewer: Remind respondent that these questions are asked so we can understand the opinions of different residents. Stress anonymity and confidentiality.

Q22. Do you have access to a car, van, motorbike or moped, as a driver? Note to interviewer: Select all relevant answers.
- ❑ Yes, car or van
- ❑ Yes, motorbike or moped
- ❑ No none of these

Q23. Are your day-to-day activities limited because of a long-term health problem, impairment, or disability? Note to interviewer: Probe, clarify as required and select one answer only.
- ❑ Yes – limited a lot
- ❑ Yes – limited a little
- ❑ No
- ❑ Prefer not to say

Q24. How would you describe your ethnic background? Note to interviewer: Ask unprompted and select one answer only.
- ❑ White British
- ❑ White Central or Eastern European
- ❑ White other
- ❑ Asian / Asian British
- ❑ Black / African / Caribbean / Black British
- ❑ Mixed / multiple ethnic group
- ❑ Other ethnic group

Q25. How would you describe the occupation (or if retired the former occupation) of the chief income earner in your household? Note to interviewer: Ask unprompted and select one answer only.
- ❑ Higher managerial / professional / administrative
- ❑ Intermediate managerial / professional / administrative
- ❑ Supervisory or clerical / junior managerial / professional / administrator
- ❑ Skilled manual worker
- ❑ Semi-skilled or unskilled manual worker
- ❑ Student
- ❑ Retired and living on state pension only
- ❑ Unemployed for over 6 months or not working due to long term sickness

Research
Evaluation
Community Engagement
Strategy Development

public
perspectives

This page is intentionally left blank

SOUTH YORKSHIRE
SYMCA
MAYORAL COMBINED AUTHORITY

Overview and Scrutiny Committee

Thursday, 14 March 2024

Local Nature Recovery Strategy

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Monitoring/Assurance
Is this a Key Decision?	No
Has it been included on the Forward Plan of Key Decisions?	Not a Key Decision

Director Approving Submission of the Report:
Clare Monaghan, Executive Director Policy & Strategic Development

Report Author(s):
Clare Monaghan, Executive Director Policy & Strategic Development,
Laurie Heykoop, Senior Sustainability Manager

Summary

As the 'Responsible Authority', the Mayor of South Yorkshire Mayoral Combined Authority is required by law to lead, prepare, publish, review, and republish a Local Nature Recovery Strategy (LNRS) and to have regard to statutory guidance in the process. Officers have prepared a governance structure to ensure the prepared strategy takes into account the needs of South Yorkshire as a region, the views and challenges faced across our region, and creates a strategy that is deliverable.

Recommendation(s)

That the Committee note the attached update on the Local Nature Recovery Strategy.

List of Appendices Included:

A   Local Nature Recovery Strategy Slides

This page is intentionally left blank

Local Nature Recovery Strategy
Overview & Scrutiny Committee

March 14th 2024

Laurie Heykoop
laurie.heykoop@southyorkshire-ca.gov.uk

SOUTH YORKSHIRE
SYMCA
MAYORAL
COMBINED
AUTHORITY

What is a Local Nature Recovery Strategy?

❑ Brought into legislation under the Environment Act 2021

❑ In Defra's words, they will...

..."identify locations to create or improve habitat most likely to provide the greatest benefit for nature and the wider environment"

... "help communities map out the action needed in their area to restore nature, working closely with local stakeholders, from farmers to school children"

❑ South Yorkshire is one of 48 strategy areas in England. Each one will:

✓ agree priorities for nature's recovery
✓ map the most valuable existing areas for nature
✓ establish shared proposals for what action they should take to recover nature and where

❑ Delivery mechanisms: Biodiversity Net Gain, direct funding streams, utilities, landowners (all sectors)

Overarching governance

Formal approval

MCA Board
Sign-off at key milestones

Oversight and management

Advisory Panel
Provide challenge, perspectives & ideas

Project Team
Project management & oversight

Steering Group
Strategy development decisions

Working Groups

Evidence

Engagement
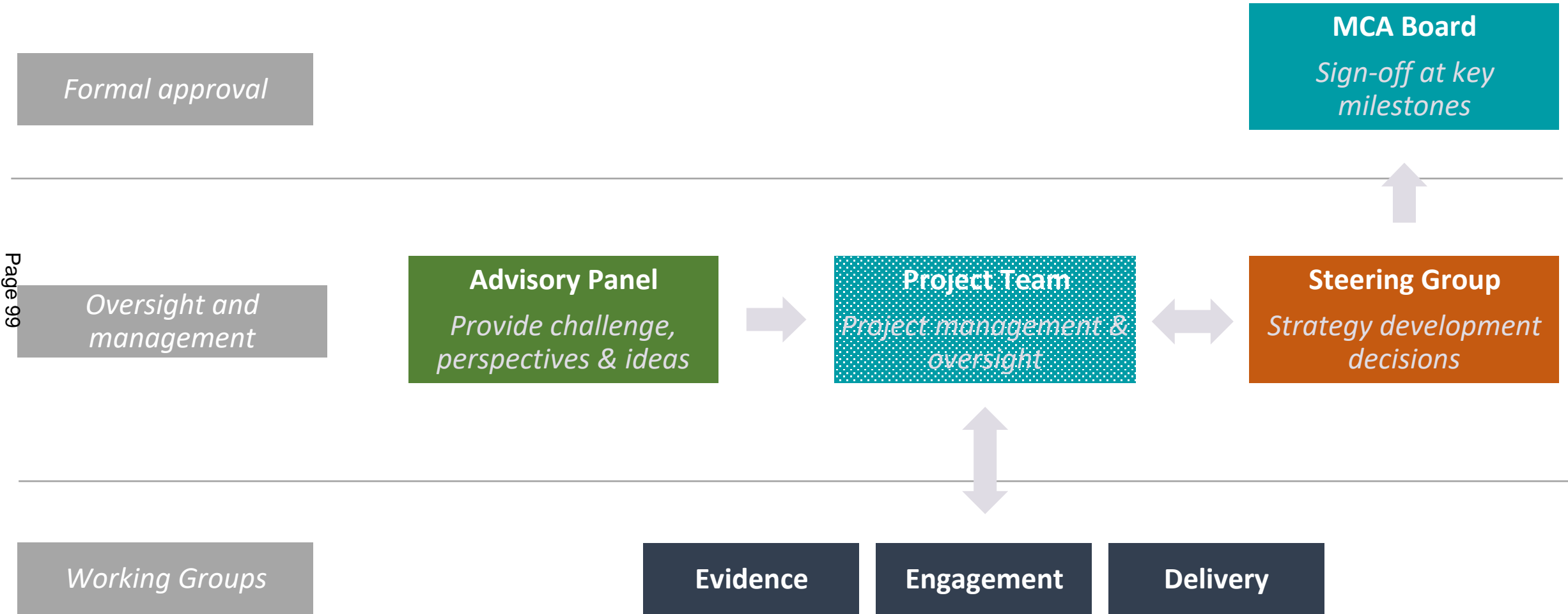
Delivery

Budget and spend

❑ Section 31 Grant provided by Defra across two financial years

❑ Purpose of funding is for expenditure preparing strategy <u>only</u> i.e. not for projects or delivery

Page 100

Spend: £128,261 (orange)

Budget: £128,698 (2023/24) £112,302 (2024/25)

Legend: ■ 2023/24 ■ 2024/25

Axis: £0, £50,000, £100,000, £150,000, £200,000, £250,000, £300,000
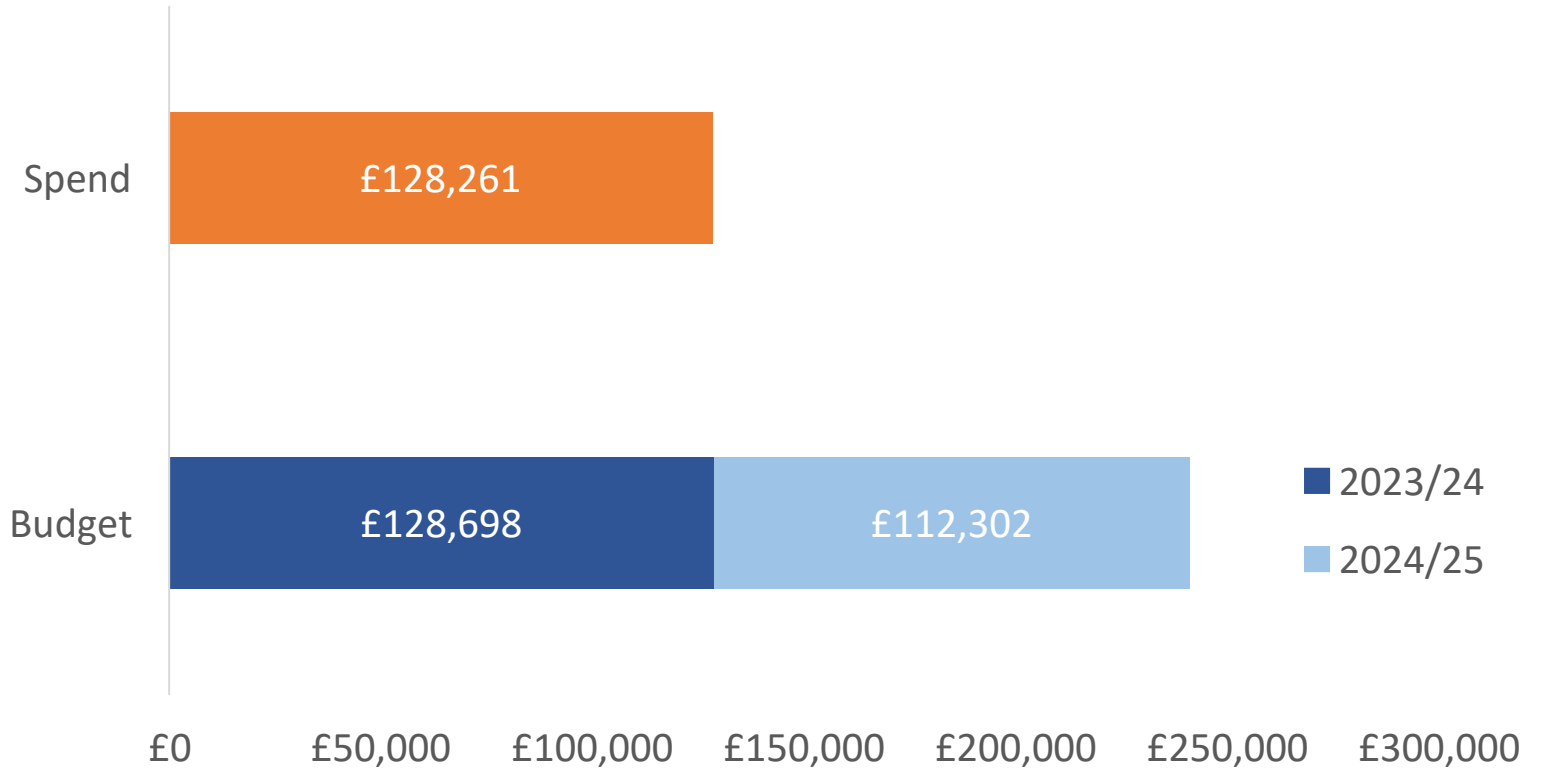
Project management

❑ Approvals process allows for full cabinet sign off for post- but not pre-consultation

❑ The timeline is consistent with a March '25 publication – not a requirement but expectation from Defra

❑ MCA Board will sign off ahead of consultation and publication
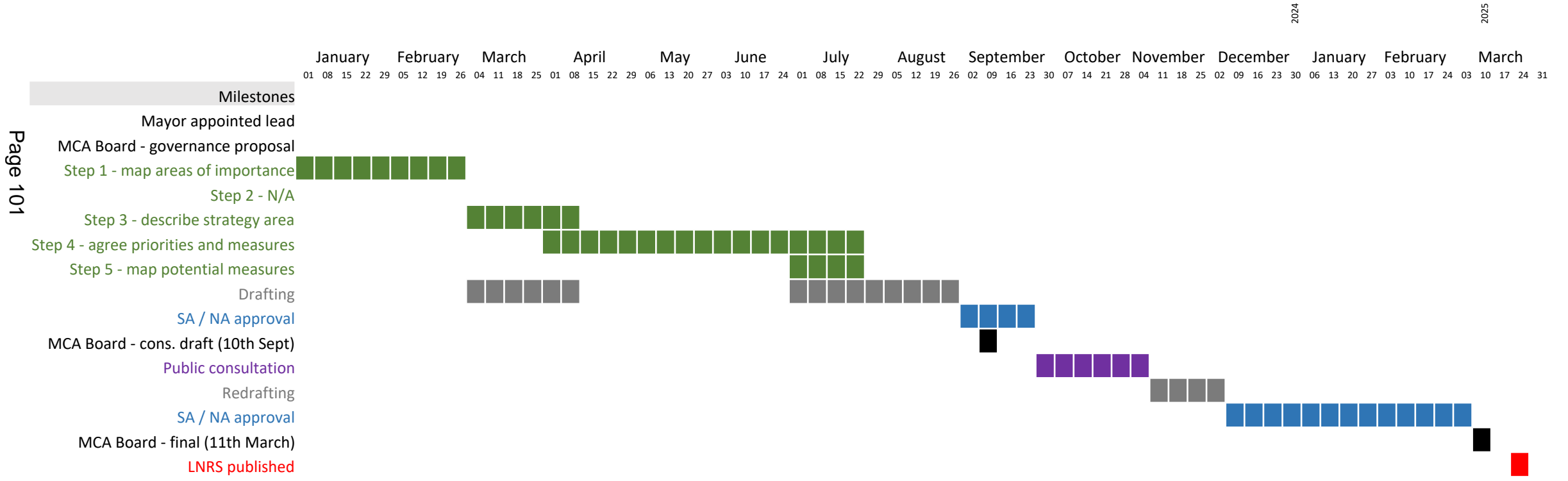
Working Groups		Evidence	Engagement	Delivery

Update

❑ Mapping 'areas of particular importance' through submissions (SYMCA hosting portal)

❑ Commissioning additional capacity and expertise (March-July):

    ❑ Undertaking call for evidence – looking beyond national/official datasets

    ❑ Ecological expert advisory role – ongoing advice, curating engagement materials

    ❑ Drafting descriptive sections of Strategy – drawing evidence together for a regional nature narrative

    ❑ Place-based community engagement events – targeted to hear from wide variety of people and places

    ❑ Facilitated workshop series – place-based in-depth discussions on nature priorities

    ❑ Public survey – wide reach across the region

❑ Exploring delivery mechanisms – private funding models, community/household role, voluntary/conservation sector, discrete funding opportunities, interaction with planning system

Anticipated process

Start

Step 1: Map **areas that are of particular importance** for biodiversity including national conservation sites, local nature reserves, local wildlife sites and irreplaceable habitats

Step 2: Map **areas where action for nature recovery has been taken** when LNRSs are reviewed and republished

Step 3: Describe the **strategy area** and its biodiversity and **opportunities for recovery**

Step 5: Map **areas that could become of particular importance**

Step 4: Agree LNRS **priorities** and identify potential measures

Local habitat map

Statement of biodiversity priorities

Local nature recovery strategy

South Yorkshire Mayoral Combined Authority
11 Broad Street West
Sheffield
United Kingdom
S1 2BQ

SOUTH YORKSHIRE
SYMCA
MAYORAL
COMBINED
AUTHORITY

Overview and Scrutiny Committee

Thursday, 14 March 2024

Local Nature Recovery Strategy

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Monitoring/Assurance
Is this a Key Decision?	No
Has it been included on the Forward Plan of Key Decisions?	Not a Key Decision

Director Approving Submission of the Report:
Clare Monaghan, Executive Director Policy & Strategic Development

Report Author(s):
Andy Gates, Assistant Director External Affairs
andrew.gates@southyorkshire-ca.gov.uk

Summary

The MCA Board has approved an investment of £2.2m to deliver a four-year Safe Space to Sleep Programme (SSTSP) in South Yorkshire for children aged 0-5.

A safe space to sleep is one of the foundational elements of early childhood. By supporting families to access, where needed, a safe bed, crib, cot or moses basket we can make a huge difference to education, health and social outcomes later in life as well as reduce the real-life cost of living pressures facing many families in South Yorkshire right now.

Recommendation(s)

That the Committee note the attached update on the Safe Place to Sleep programme.

List of Appendices Included:

A   Safe Place to Sleep Slides

This page is intentionally left blank

Tackling inequalities in Early Childhood

A Safe Space to Sleep Programme for South Yorkshire

Using Problem Driven Iterative Adaption tools to tackle problems in a complex, multi-agency and dynamic system.

SOUTH YORKSHIRE
SYMCA
MAYORAL COMBINED AUTHORITY

Using collaboration techniques to explore new ways of tackling CYP health inequalities

Why did we choose health inequalities and early years?

1. A complex system – with a statutory obligation to collaborate.

2. A new partnership emerging (ICP) and a mandate for change.

3. A particularly acute issue in South Yorkshire.

4. A commitment from partners for change and action.

A team of 8 established with representation from **public health, service commissioners, the Integrated Care Board, the NHS, the voluntary and community sector, academia and the Mayoral Combined Authority.**

Problem Driven Iterative Adaption: a tool for getting things done in complex environments....

Never start with a solution! At the outset the project team didn't know where we were heading.

Problem definition (a very detailed fishbone): Testing that with partners to destruction.

Developed a Public Value Proposition: what are we tackling and why are we doing it.

Conducted a Change Space Analysis: testing where we can actually make a difference

Identify Entry Points: Agreeing where to actually start (not always where you think!)

Testing our progress: we've been testing our public value proposition and entry points w. stakeholders

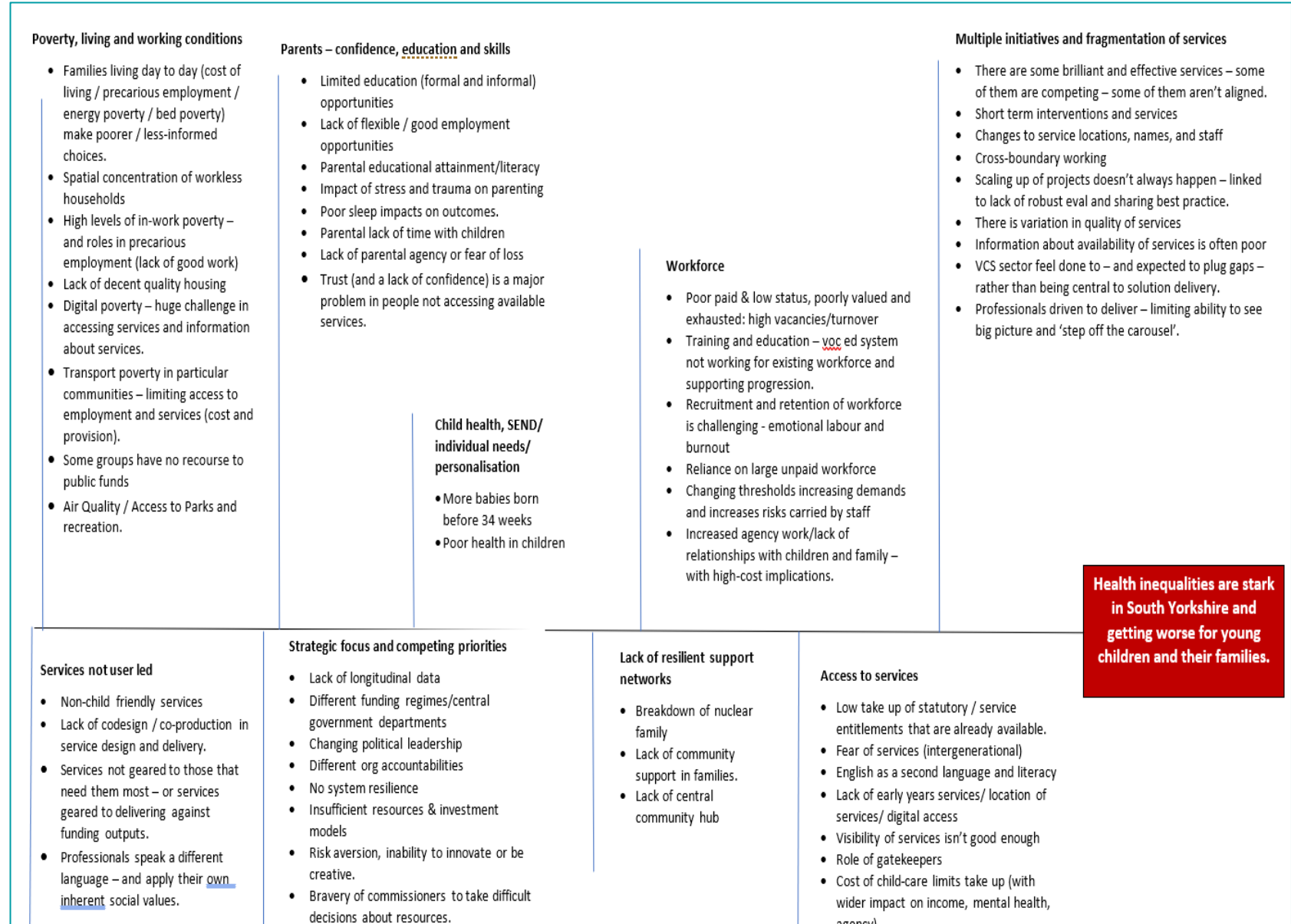**Power of Small Wins –** recognise the power of small wins by capturing regular progress updates…

Securing commitment to deliver a UK first 'Safe Space to Sleep Programme' in South Yorkshire.

Our problem fishbone

A tool for exploring the problem identified; and making sure we hear a range of voices

- A complex problem – with lots causes.

- Some system issues, some workforce, some societal.

- We've tested this with hundreds of stakeholders – including at the South Yorkshire Health Inequalities Summit.

- It gave us plenty of potential entry points. Many aren't new to professionals working in this space.

- But knowing your problem helps you work out where we could start.

Poverty, living and working conditions

- Families living day to day (cost of living / precarious employment / energy poverty / bed poverty) make poorer / less-informed choices.
- Spatial concentration of workless households
- High levels of in-work poverty – and roles in precarious employment (lack of good work)
- Lack of decent quality housing
- Digital poverty – huge challenge in accessing services and information about services.
- Transport poverty in particular communities – limiting access to employment and services (cost and provision).
- Some groups have no recourse to public funds
- Air Quality / Access to Parks and recreation.

Parents – confidence, education and skills

- Limited education (formal and informal) opportunities
- Lack of flexible / good employment opportunities
- Parental educational attainment/literacy
- Impact of stress and trauma on parenting
- Poor sleep impacts on outcomes.
- Parental lack of time with children
- Lack of parental agency or fear of loss
- Trust (and a lack of confidence) is a major problem in people not accessing available services.

Child health, SEND/ individual needs/ personalisation

- More babies born before 34 weeks
- Poor health in children

Workforce

- Poor paid & low status, poorly valued and exhausted: high vacancies/turnover
- Training and education – voc ed system not working for existing workforce and supporting progression.
- Recruitment and retention of workforce is challenging - emotional labour and burnout
- Reliance on large unpaid workforce
- Changing thresholds increasing demands and increases risks carried by staff
- Increased agency work/lack of relationships with children and family – with high-cost implications.

Multiple initiatives and fragmentation of services

- There are some brilliant and effective services – some of them are competing – some of them aren't aligned.
- Short term interventions and services
- Changes to service locations, names, and staff
- Cross-boundary working
- Scaling up of projects doesn't always happen – linked to lack of robust eval and sharing best practice.
- There is variation in quality of services
- Information about availability of services is often poor
- VCS sector feel done to – and expected to plug gaps – rather than being central to solution delivery.
- Professionals driven to deliver – limiting ability to see big picture and 'step off the carousel'.

Services not user led

- Non-child friendly services
- Lack of codesign / co-production in service design and delivery.
- Services not geared to those that need them most – or services geared to delivering against funding outputs.
- Professionals speak a different language – and apply their own inherent social values.

Strategic focus and competing priorities

- Lack of longitudinal data
- Different funding regimes/central government departments
- Changing political leadership
- Different org accountabilities
- No system resilience
- Insufficient resources & investment models
- Risk aversion, inability to innovate or be creative.
- Bravery of commissioners to take difficult decisions about resources.

Lack of resilient support networks

- Breakdown of nuclear family
- Lack of community support in families.
- Lack of central community hub

Access to services

- Low take up of statutory / service entitlements that are already available.
- Fear of services (intergenerational)
- English as a second language and literacy
- Lack of early years services/ location of services/ digital access
- Visibility of services isn't good enough
- Role of gatekeepers
- Cost of child-care limits take up (with wider impact on income, mental health, agency)

Health inequalities are stark in South Yorkshire and getting worse for young children and their families.

Our value proposition

The first 5 years of a child's life determine their next 50

"We will tackle the fact that too many of our children are locked out of a successful future and are dying too soon, and we will do this because we want our children to have a good start in life, so they live healthier and happier lives."
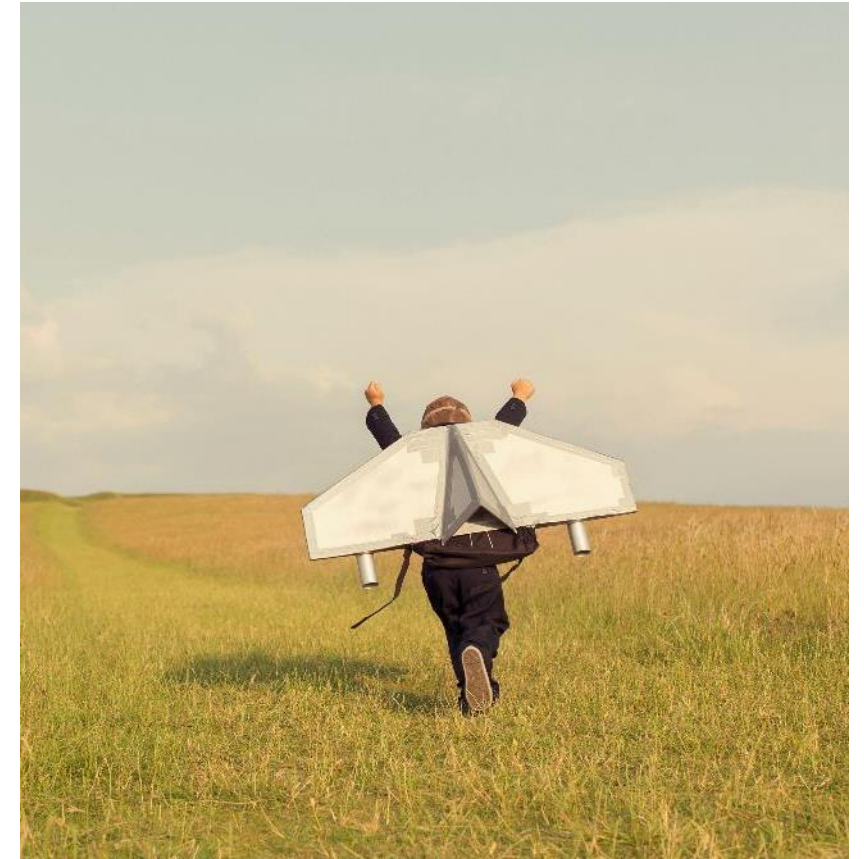
The entry points we chose

1. When problems are so large you have to pick some ways in.

2. These routes in need to help you move things on; they need to be generative in nature.

3. They need to be achievable – tested through the 'change space analysis' process.

Entry Point	Activities to make progress	Why
Exploring the diverse / fragmented / complex services:	Understanding refining, testing and mapping the systems of support available in a community we work in.	To gain a deeper understanding of families experience and engage with all those who are involved. Ability to do something about it. Acceptance both that this is an issue and that it can make a substantive impact on outcomes.
Narrowing our target group through data	Agreeing a definition and focus for data enquiry: working hypothesis is that we want to narrow our focus and build richness in our understanding of families at risk of, or currently experiencing poor health outcomes.	Do-able. Can help create support for our effort. By narrowing we make the project real.
Trusted networks	Research / identify best practice, find positive deviants, and deepen our understanding by: - National literature review – role of trusted networks - Identify partners and stakeholders who can help shape policy.	1. Key theme running through stakeholder engagement on fishbone. 2. Helps nudge 'acceptance' of the 3A's – and helps us iterate. 3. Enables us to use existing resources more effectively.
Safe Space to Sleep	1. Providing knowledge, training, & access on the importance of safer sleeping to service providers and parents 2. Provision of appropriate bed, mattresses & bedding 3. Evaluate the impact with users and service provider.	1. This is an entry point that allows us to create a conversation about the wider problem and demonstrate progress – with a large change space. 2. Providing a bed is a potential first contact point with a vulnerable family. 3. Brokers trust between provider & family

All leading to a signature MCA commitment

MCA Board have approved funding of £2.2m to:

1) **Make a difference in the here and now:** Tackling unmet and growing demand for cots, cot beds / toddler beds and moses baskets for children aged 0-5 right across South Yorkshire through the commissioning of specialist voluntary community providers

2) **Test and learn:** Delivering 4 test and learn pilots that are scalable across SY built on a detailed evidence base of what works at a community level. Pilots will take place in Goldthorpe, (Barnsley) Mexborough (Doncaster), Swinton (Rotherham), Gleadless (Sheffield) and will include:

   i) The provision of beds, cots and bedding

   ii) Liaising with housing services and connecting families to access other services

   iii) Utilising new methods of trusted intermediaries in communities – with a focus on testing whether trust and supporting families can improve SStS (and health outcomes)

   iv) Data sharing protocols and activity that deepen the understanding of the issue locally – connecting services better and building a no wrong door approach.

3) **Evaluation programme:** to build an investment case for shifting mainstream resources into prevention, social and community infrastructure capital.

What would success look like?

Inequity of outcomes in early childhood are preventable.

Our success will be measured with equity of outcomes in South Yorkshire.

Every child will have a safe space to sleep, families will be supported by trusted networks and every child will be ready for life (and therefore school).

Measures we can use: Scorecard of indicators, including using metrics we capture already such as reduced infant mortality, reduced teenage suicide, a child's 2.5 years of age developmental report, obesity levels, dental health, gross and fine motor skills, social capabilities (e.g. toileting) by age of 5.

The **long-term prize** is a narrowing of the gap in health inequalities, improvements in overall life expectancy and healthy life expectancy.

Trusted responsive services can achieve huge change

Stacey, a single carer, arrived at nursery with her two-year-old child and two-year-old grandchild exhausted and desperate for support. She had financial difficulties, was worried about her son's speech and language and had nowhere for her granddaughter to sleep. Nursery staff made an immediate referral to Baby Basics for a bed and sorted out her benefit entitlement. After two months of nursery, she had built trust with staff, started to attend a parent's breakfast club and had even volunteered to become the cook and do her food hygiene training. Stacey's children had started to speak, play and trust adults.

SOUTH YORKSHIRE
SY MCA
MAYORAL COMBINED AUTHORITY

Overview and Scrutiny Committee

Tuesday, 14 March 2023

Draft Overview & Scrutiny Committee Chair's Annual Report

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Governance
Is this a Key Decision?	No
Has it been included on the Forward Plan of Key Decisions?	Not a Key Decision

Director Approving Submission of the Report:
Steve Davenport, Director of Legal and Governance

Report Author(s):
Sarah Pugh, Democratic Services Officer
Sarah.pugh@southyorkshire-ca.gov.uk

Summary

This Annual Report sets out the Overview & Scrutiny Committee membership for 2023/24 and provides detail on attendance and quoracy levels as well as an overview of the work of the Committee. An online survey was conducted in February 2024, to undertake an assessment of Committee effectiveness, and its results are summarised within the report.

The Scrutiny Protocol, published in November 2023, also sets out non-statutory guidance for how the overview and scrutiny and audit committees hold Authorities with devolved powers and their mayor or directly elected leader to account.

This report aims to demonstrate how the Committee has fulfilled its terms of reference and provided a scrutiny function during the year, and also sets out an improvement plan for 2024/25, with the aim of improving Committee effectiveness, and working towards implementation of the Scrutiny Protocol.

Recommendation(s)

That the Overview & Scrutiny Committee:
1. Consider the draft report and provide any extra feedback for inclusion in the final version,
2. Note that following the March 2024 Committee meeting, statistics and recommendations in the report will be updated in time for submission of the Chair's report to the MCA Board AGM.
3. Recommend a finalised/completed report to the MCA Board.

List of Appendices Included:

A Draft Overview & Scrutiny Committee Chair's Annual Report

Draft SYMCA Overview and Scrutiny Committee Chair's Annual Report

2023/24

Contents

Foreword from the Chair of the Overview and Scrutiny Committee

1. **Introduction**

2. **Membership**

3. **Summary of Work Undertaken and Highlights**

4. **Performance and Engagement Information**

5. **Self-Evaluation of Committee Effectiveness**

6. **Effectiveness Improvement Plan**

Foreword from the Chair of the Overview and Scrutiny Committee

I am pleased to present the report of the Overview and Scrutiny Committee ('The Committee') for the municipal year 2023/24. The report covers the period from 1 April 2023 to 31 March 2024 and is the first annual report prepared by the Committee since its establishment.

South Yorkshire Mayoral Combined Authority (MCA) continues to undergo significant change since its inception. It has taken on a broader set of statutory responsibilities and powers, seen the election of the new Mayor in May 2022 with an ambitious Manifesto for South Yorkshire, and the completion of governance review in 2023.

The past year has been no less challenging for the MCA Overview & Scrutiny Committee, with an almost complete turnover in membership of the Committee in 2023/24, and the publishing of the Scrutiny Protocol by Government, setting out ambitious standards for the function of Scrutiny in Authorities with devolved powers.

Combined Authorities are more strategic organisations, and so delivering highly focussed scrutiny is more of a challenge than at Local Authority level, and, as a new Committee on the path to establishing its ways of working, we weren't able to achieve a suite of significant outputs in the year 2023/24 alone.

Nonetheless, this Committee has played its part in building towards a culture of robust and effective scrutiny in South Yorkshire. Our work programme in 2023/24 focussed on the most significant upcoming change programmes and high-priority areas if work for the MCA and South Yorkshire's Communities. It also remained flexible enough to accommodate short-term issues as they arose during the year.

Our Committee has developed its relationships with the MCA Executive Team, the Mayor, and subject-experts at the MCA through regular briefings and touch points, and therefore kept abreast of the most critical MCA business.

With the tram transfer programme, the bus franchising proposals and the transfer of police and crime commissioner functions to the Mayor, 2024/25 will continue to be a year of significant growth and ambition in South Yorkshire;

With the implementation of the Scrutiny Protocol dovetailing with these projects, I know the Overview & Scrutiny Committee will play its part in making a tangible difference to the work of the MCA, and driving real change for the residents of South Yorkshire.

Cllr Tim Huggan, Chair of the Overview and Scrutiny Committee

1. Introduction

This report is produced in accordance with best practice guidance[1] and demonstrates the MCA's commitment to operating the highest standards of scrutiny and governance. It demonstrates how the Overview & Scrutiny Committee has successfully fulfilled its terms of reference and acted as a 'critical friend' challenge to the Mayor, the MCA, its committees, and Officers.

The Committee plays a key role in scrutinising the decisions of the Mayor and the MCA, and to make recommendations for improvement and/or change. The Committee investigates matters of strategic importance to residents and businesses within South Yorkshire and to reports recommendations as appropriate to the Mayor and the MCA.

Minutes of the Committee's meetings are available on the MCA's website[2].

2. Membership and Nomination of a Chair

Following the agreement of the MCA Board on 5th June 2023 the Committee composition was agreed as follows.

As required by 'The Combined Authorities (Overview and Scrutiny Committees, Access to Information and Audit Committees) Order 2017'[3] the membership of the Committee, so far as reasonably practical, reflects the balance of political parties of the constituent councils.

Appointments are made annually at the first quorate meeting of the Committee after the MCA's AGM. Cllr Tim Huggan was elected Chair at the meeting held 22nd June 2023.[4]

During the year the membership comprised the following:

Councillor	Party	Authority represented	Formal meetings attended*
Cllr Jeff Ennis	Labour	Barnsley MBC	3
Cllr Hannah Kitching	Liberal Democrat	Barnsley MBC	3
Cllr Jake Kearsley from 6 October 2023 (Cllr Barry Johnson was appointed in June, and stepped down on 6 October 2023)	Labour	Doncaster Council	0 (0)
Cllr Jane Kidd	Labour	Doncaster Council	0
Cllr Joshua Bacon	Conservative	Rotherham MBC	2
Cllr Ken Wyatt	Labour	Rotherham MBC	2
Cllr Tim Huggan (Chair)	Liberal Democrat	Sheffield CC	3

---

[1] https://www.gov.uk/government/publications/overview-and-scrutiny-statutory-guidance-for-councils-and-combined-authorities
[2] https://governance.southyorkshire-ca.gov.uk/ieListMeetings.aspx?CommitteeId=138
[3] The Combined Authorities (Overview and Scrutiny Committees, Access to Information and Audit Committees) Order 2017
[4] https://governance.southyorkshire-ca.gov.uk/ieListDocuments.aspx?CId=138&MId=1652&Ver=4

Cllr Sioned-Mair Richards	Labour	Sheffield CC	3
Cllr Douglas Johnson	Green	Sheffield CC	2
Cllr Zahir Naz	Labour	Sheffield CC	1

Table 1 Overview and Scrutiny membership

*at the time of writing, 3 out of 4 formal Committee meetings for 2023/34 have taken place.

To support quoracy requirements, the Committee has in place a 'reserve' member arrangement for elected members. Reserve members are as follows:

Reserves	Party	Authority represented	Formal Meetings attended as substitute
Cllr John Clark	Labour	Barnsley MBC	0
Cllr Steve Hunt	Liberal Democrat	Barnsley MBC	0
Cllr Ian Pearson	Labour	Doncaster Council	0
Vacant	Labour	Doncaster Council	N/A
Cllr Lee Hunter	Conservative	Rotherham MBC	0
Cllr Maggi Clark	Labour	Rotherham MBC	0
Cllr Joe Otten	Liberal Democrat	Sheffield CC	0
Cllr Laura McClean	Labour	Sheffield CC	0
Cllr Christine Gilligan Kubo	Green	Sheffield CC	1
Councillor David Barker	Labour	Sheffield CC	0

Table 1 Overview and Scrutiny Committee reserve membership

3. Summary of Work Undertaken and Highlights of the year

The Committee agreed a work plan at its meeting in July 2023 and included the following:
1. Bus Franchising
2. Tram Ownership
3. Skills & Community Education
4. Active Travel
5. Police and Crime Commissioner Powers
6. £2 Bus Fares and Concessions
7. Local Nature Recovery Strategy
8. Safe Place to Sleep Programme
9. Health Inequalities
10. Community Transport

At an informal workshop on 30th January 2024, the Committee considered suggestions for a 2024/24, which included:

1. Police and Crime Commissioner powers
2. Level 4 Devolution
3. Scrutiny of Mayoral Initiatives such as Tree Planting and Safe Place to Sleep
4. Bus Franchising & Community Transport
5. Active Travel
6. Tram Ownership
7. Skills provision

Some key outcomes and benefits of the work of the committee during the period have included:

1 – Work Programming

The MCA has supported the Committee this year to develop and deliver an effective work programme; The committee developed a proposed workplan at a collaborative workshop in July, which was circulated with the MCA Executive and the MCA Board. The committee has subsequently considered and amended its workplan at each formal committee meeting, ensuring that it remains robust and responsive to the changing work of the MCA.

The Committee showed a particular interest in the implementation of £2 single bus fares across the region. Alongside this, the committee requested more insights into the impacts of changing fare concessions. Updates on this topic were provided by officers to the Committee at their June[5] and September[6], and an informal committee briefing on the topic was delivered in November. A final report with full analysis and recommendations is expected at the 14 March Committee meeting.[7]

2 – Member Induction and Briefings

Significant developments were made to the member induction offer in year. A welcome and induction session provided members with an induction to the institution, its powers, roles, and responsibilities at the beginning the municipal year. A mid-year follow up session with the Executive team was delivered in December 2023. A mid-year review workshop was delivered with members in January 2023, which provided an opportunity to review the delivery of their workplan in 2023/24 and begin to shape upcoming workplans.

Further, a series of informal knowledge briefings has been delivered in year, with 10 briefings delivered by MCA Officers across a range of topics. In particular, the committee have had the opportunity for 3 informal briefings on the Bus Franchising assessment process, as well as created time for briefings on ad-hoc topics such as health inequalities and community transport outside of the formal committee meeting cycle.

Invites to these briefings have been extended to ASRC Members to boost links between Committee workplans.

This stronger approach to member training, delivered through an ongoing programming of events and activities, has support the engagement of members with the MCA and developed a culture of collegiate and efficient working, ultimately contributing to the smooth delivery of MCA business.

3 – Mayoral Scrutiny

The Mayor has been in attendance at every committee meeting in 2023/24 to present updates and to take questions on the full breadth of the MCA's work and his manifesto. Committee Members have valued the Mayor's engagement, and Mayoral Scrutiny is often an item which uses a significant portion of committee meeting time.

Mayoral Scrutiny is a key facet of Scrutiny at Combined Authorities, and the Mayor's attendance at all committee meetings brings South Yorkshire in line with other Combined Authority practices. Mayoral engagement with Scrutiny is a regular feature of governance at Greater Manchester Combined Authority, and the Mayors of West Midlands and West Yorkshire Combined Authorities attend regular dedicated Question Time meetings.

---

[5] https://governance.southyorkshire-ca.gov.uk/ieListDocuments.aspx?CId=138&MId=1652&Ver=4
[6] https://governance.southyorkshire-ca.gov.uk/ieListDocuments.aspx?CId=138&MId=1653&Ver=4
[7] https://governance.southyorkshire-ca.gov.uk/ieListDocuments.aspx?CId=138&MId=1655&Ver=4

The Mayor and Committee Chair had an introductory meeting in August 2023, and the Chair has subsequently had quarterly meetings with the Chief Executive to remain abreast of the most critical MCA Business*.*

4. Performance and Engagement Information

Quorum and attendance

Four meetings were held between June 2023 and December 2023. All but the meeting on 14th December 2023 were quorate.

Report publication

For the meetings held between June and December 2023 a total of 9 substantive reports were considered by the Committee. No reports were published late.

Public Engagement

The Overview & Scrutiny Committee is a statutory meeting, is required to be held in public and receive and answer public questions.

No members of the public attended any of the Overview & Scrutiny Committee meetings during the year or submitted any questions.

Through Mid Cycle Briefings, questions to the MCA Board have this year begun being reported to the Overview & Scrutiny Committee.

Meetings of the Overview & Scrutiny Committee are webcast live and made available on the MCA's website for six months, after which, they are archived and available on request. At time of writing, live and archived views of Overview & Scrutiny Committee meetings that have taken place in 2023/24 total 255, and for the meetings held between June and December 2023 the Committees webpages received 287 visits.

5. Self-Evaluation of Committee Effectiveness

The newly published Scrutiny Protocol[8] recommends that Scrutiny Committees undertake an assessment of their own effectiveness annually. An online survey to facilitate this was conducted, closing on 20th February. Based on the substantive membership of the Committee the survey received an 80% response rate.

An informal workshop was also delivered with the Committee on 30th January 2024 where member feedback on Committee Effectiveness was collected.

The survey focussed on 3 key areas:

- The skills and knowledge of the Committee.
- Relationships between members, members and MCA officers and members and the MCA Board and Mayor.
- Administration and operational requirements of the Committee.

---

[8] https://www.gov.uk/government/publications/scrutiny-protocol-for-english-institutions-with-devolved-powers/scrutiny-protocol#:~:text=The%20Protocol%20provides%20guidance%20for,1.11.

Overall, members were somewhat satisfied that the Committee was effective in these areas. However, members expressed that the scale of work required in the scrutiny function is a significant burden requiring much resource from members alongside their other responsibilities.

The key findings were as follows:

Skills and Knowledge

Members strongly expressed that specific training on key scrutiny skills, such as effective and impartial questioning techniques and making effective recommendations, and techniques to encourage members to focus on the "bigger picture" would be beneficial. There were references made in survey to "point scoring" in councillors questioning currently.

Members were very satisfied with knowledge briefings delivered this year, and welcomed the contribution of greater technical expertise on topics such as bus franchising, the skills agenda or tram operations, to support their understanding of the core knowledge of the core business of the organisation.

Members expressed willingness to be more informed across the breadth of the MCAs portfolio areas, but economic growth, net zero and environment and travel and transport were highlighted in particular as topics where greater expertise would be beneficial.

Relationships and Communication

Responses indicated that overall members felt their relationships with MCA Executive Officers were effective, though it was noted that meeting agendas tend to be "officer-led" as opposed to member-led.

Responses indicated that the infrequency of meetings makes it difficult for members to form strong working relationships, though responses also stressed the importance of all committee members attending meetings and contributing to the work of the committee.

Survey responses welcomed the Committee's relationship with the Mayor as positive, but noted that this is a developing relationship and regular engagement will continue to be beneficial. Members felt that the relationship between the Committee and the MCA Board was somewhat ineffective.

Administration and Operational Requirements

Members were asked about the Committee's effectiveness in work programming, and responses indicated that overall members agreed that "effective and robust work planning" had been undertaken in year.

Greater use of Task and Finish exercises has been requested, but members have expressed again that their limited resource restricts the scope and scale of work which can be undertaken.

Members expressed that a Vice-Chair of the Committee should be appointed going forward to support management of Committee meetings.

Finally, the Committee has noted the lack of public awareness of the scrutiny function in the region, and highlighted communications around decision-making and their role in holding the Mayor to account, as an area for development.

6. Scrutiny Protocol 2023

The Levelling Up White Paper set out a mission that by 2030, every part of England that wants a devolution deal will have one. The English Devolution Accountability Framework was published in March 2023, and sets out how areas with devolution deals will be scrutinised and held to account through local scrutiny, by the public and by Government.

The Scrutiny Protocol ('The Protocol'), published in November 2023, sets out non-statutory guidance for how the overview and scrutiny and audit committees hold Authorities with devolved powers and their mayor or directly elected leader to account.

Improvements to committee effectiveness made during 2023/24 have been outlined in this report, and the Protocol sets a number of 'key principles' which Authorities should aspire to deliver, these are:
1. Pool of Members
2. Politically Balanced Membership
3. Geographically Balanced Membership
4. Appointment of Chair
5. Sustained Appointments made on Interest and Skills
6. Well-resourced Training
7. Inviting Technical Expertise
8. Remuneration and Status
9. Holding the Mayor or Directly Elected Leader and the Institution to Account
10. Participation in Pre-policy and Pre-decision scrutiny
11. Provision to Call-in
12. Regular Performance Monitoring
13. Robust Work Planning
14. Focussed Task and Finish Exercises
15. Strong Relationships with Stakeholders
16. Regular Self Evaluation and Reflection
17. Access to data Research and Analysis
18. Strong Relationship With Audit Committees

These themes were also used to shape the questions in the 2023/24 Committee Survey. Therefore, the themes of the Protocol and feedback from the Committee through their workshop and responses to the committee survey have formed the basis of the following improvement plan.

7. Scrutiny Effectiveness Improvement Plan

	Area	Recommended actions
1.	**Skills and Knowledge**	- Continuation of programme of subject specific knowledge briefings, - Deliver training on essential scrutiny skills such as questioning techniques, - Facilitate sustained appointment of members through nominations documentation; inclusion of role specification and term length in nominations documentation. - Election of a Committee Vice-Chair, - Continue to build on introductory material and briefings and produce a toolkit to boost members knowledge and skills,

		• Increate Committee access to access to data, research and analysis of the organisation's performance. • Greater use of technical expertise to enhance scrutiny of decisions and provide training to Committee members.
2.	**Relationships and Communication**	• Develop links between Scrutiny and Audit committees and Chairs through regular catch ups and alignment of Committee workplans, • Continue to deliver the current model of Mayoral Scrutiny at meetings, • Continue to deliver regular contact between members, the Chair and Senior MCA Officers, • Enhance visibility of the Scrutiny and the MCA's Committees and decision-making, • Alignment with Local Authority Scrutiny Committee workplans and developing adequate report-back mechanisms.
3.	**Administrative and Operational Arrangements**	• Submit an annual report to the MCA Board and to set out Committee workplans and a formal mechanism to escalate any recommendations to the MCA Board, • Implement an additional committee meeting per year, aligned to the MCA meeting cycle, • Continue to develop and enhance Committee work planning mechanisms, • Make greater use of Scrutiny tools available to members such as Task and Finish Groups, • Continue to deliver committee surveying and self-reflection mechanisms, • Encourage more effective use of apologies and substitute members to ensure quoracy at all meetings.

Table 3 Scrutiny Effectiveness Improvement Plan