



Leicestershire County Council

Leicestershire
EP Management

BSIP Annual Review

October 2022



a company of Royal HaskoningDHV

Table of Contents

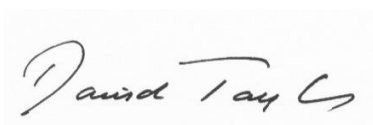
1. EP Chair’s Foreword	1
2. Introduction.....	2
3. Overview	2
4. Governance Arrangements	3
5. Current Bus Offer to Passengers	4
6. Measures.....	6
Measure S1 Timetabling and frequency	6
Measure S3 Consistent, high quality roadside infrastructure	7
Measure S5 Branding and marketing.....	8
Measure S6 DRT	8
Measure S7 Service quality standards	8
Other Measures	9
7. Targets	9
8. BSIP Review Plans	10

List of Tables

Table 7-1 BSIP Targets.....	9
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1. EP Chair's Foreword

- 1.1 Over the past year, although passengers have started to return to the bus, numbers are still far short of the pre-covid levels, when we in Leicestershire along with other rural authorities were facing declining bus usage. It was the possibility of government funding specifically directed to help reverse the ongoing decline in usage and support the recovery from the pandemic that was most welcome.
- 1.2 Rising operating costs, reduced demand for travel, and the uncertainty over continuing government support, has provided a challenging first year since the Leicestershire BSIP was first submitted. It was with extreme disappointment that we were then unsuccessful in receipt of funding through the BSIP process, which could have offset some of these challenges, and hopefully reverse the decline in bus usage.
- 1.3 It is with great credit, therefore, that even without this financial support, the Leicestershire Enhanced Partnership has been able to make steady progress in improving our customers journey experience. The Partnership has begun to deliver on the measures set out in year 1 of the BSIP initially with small steps, we have been able to standardise timetable changes, complete stops and shelters audit, develop a Customer Charter, implement a Digital Demand Responsive Transport service while we are in the process of setting up a Passenger Forum and reviewing the authority's supported bus network.
- 1.4 While we want to see change happen quickly, we realise that significant changes take time and can only be delivered with the financial support of the government. Going forward we are determined to ensure we deliver a more attractive and convenient service to reverse the decline in bus usage in Leicestershire.



David Taylor
Chair Leicestershire Enhanced Partnership

2. Introduction

- 2.1 The Leicestershire BSIP was published in October 2021 by Leicestershire County Council and its partners and sets out the context and vision for bus service delivery in the county. There is a commitment to review this BSIP on an annual basis; this document represents the first review of the BSIP and sets out any changes which have occurred during the last year, as well as any changes relating to the delivery of the BSIP and its targets.

3. Overview

- 3.1 Since October 2021, the impact of Covid and associated restrictions has continued to have an impact on bus provision within Leicestershire. One operator - Midland Classic – was acquired by Rotala Plc, parent company of Diamond Bus in August 2022. Although there is no dominant bus operator, Arriva retains the largest market share of commercial bus services within Leicestershire.
- 3.2 Increased operational costs pose challenges for bus operators, particularly the need to increase wages to attract or retain drivers who are attracted by higher wages paid by HGV companies, alongside increasing fuels costs. Some operators have curtailed the routes of certain commercial services in the wake of reduced passenger numbers and driver shortages. Others have removed services which were partially supported by the County Council as they are no longer considered viable.
- 3.3 Patronage on local bus services across the network remains at approximately 80% of pre-Covid levels. Patronage on Park & Ride services for the first half of financial year 2022/23 was just under a third (37%) of the figure for the same period in 2019/20, as a result of changing travel to work behaviour and the greater availability of city centre parking in Leicester. Concessionary patronage is around 62% of pre-pandemic levels; seemingly government Covid messaging that public transport is unsafe has had a lasting impact.

County Council support for local bus services

- 3.4 Throughout the Covid-19 pandemic, the County Council continued to provide support for local bus services by extending existing local bus service contracts. However, in line

with procurement regulations, these contracts were required to go through an open tender process with contracts being advertised via the Contracts Finder portal. The Council has also continued to provide support using Department for Transport (DfT) grant funding, including Covid Bus Services Support Grant (CBSSG), Bus Service Operators Grant (BSOG) and Local Transport Fund (LTF), to support both the commercial and supported bus network.

- 3.5 The Council recognised that the pandemic had had an impact on travel habits and the challenges of uncertain patronage levels faced by operators. For this reason, the local bus service contracts were tendered on a minimum cost basis only, with the Council taking the revenue risk. Contracts were tendered on a like-for-like basis, based on pre-Covid (February 2020) timetables to provide reassurance for the travelling public.
- 3.6 The contracts were awarded for a period of 24 months from 1st August 2022, with an option to extend for a further 12 months. During this time, all local bus service contracts will be reviewed as part of a countywide review of provision in the context of the Council's Passenger Transport Policy and Strategy - which was paused following the onset of the pandemic - and in relation to the post-Covid commercial network.
- 3.7 In spite of this challenging operational environment, the measures set out in the BSIP offer the opportunity for real change to improve the reliability of bus services and offer an attractive alternative to the car.

4. Governance Arrangements

- 4.1 Although Leicestershire did not receive any funding from DfT to deliver its BSIP measures, the County Council remains committed to working in partnership with operators and stakeholders to deliver improvements. Following submission of the BSIP in October 2021, an Enhanced Partnership Plan and Scheme have been developed which were subject to operator, stakeholder, and public consultation. Leicestershire County Council's Cabinet formally approved the Enhanced Partnership Plan and Scheme on 29th March 2022 and the Plan and Scheme were 'made' on 31st March 2022. The Plan and Scheme documents can be viewed [here](#).
- 4.2 The Leicestershire Enhanced Partnership (EP) was formed which is governed by two bodies:
 - Leicestershire EP Forum – an informal group, providing opportunities for discussing issues of all kinds affecting the Leicestershire bus network, consulting with, and building consensus across, the various stakeholders and making recommendations for consideration to the EP Board.

- Leicestershire EP Board – the key oversight body of the Leicestershire EP. The Board will make recommendations for consideration by the County Council on all matters relevant to the operation and continuing development of the EP including proposals for variations to existing EP Schemes and proposals for new EP Schemes.
- 4.3 An AGM was held on 12th May 2022 to which all EP Forum members were invited. This was followed by an EP Forum meeting on 22nd September 2022. The first EP Board meeting was held on 23rd June 2022 – the next Board meeting is scheduled for 10th November 2022. The EP Forum and Board will continue to drive forward improvements to bus services in Leicestershire. Working groups have been established as appropriate to take Schemes forward, including the roadside infrastructure standards development.
- 4.4 It was recognised that the delivery of the BSIP would be resource intensive from a County Council officer perspective. Throughout the process, transport consultants specialising in public transport have been engaged to assist in the development and delivery of the BSIP. Consultants, ITP, manage the Enhanced Partnership on behalf of the County Council and its partners. The Forum and Board meetings are chaired by an independent consultant. The County Council has received funding from DfT to manage the Enhanced Partnership and will be formulating EP officer roles using DfT funding to continue driving forward the aspirations of the BSIP, management of the EP and supporting local development plan passenger transport strategies across the county.

5. Current Bus Offer to Passengers

- 5.1 Passenger travel habits changed as a result of the pandemic and there is no solid evidence that a new 'normal' has been reached in terms of demand for travel in the county.
- 5.2 Patronage is still recovering from the impact of Covid, although it is unlikely to return naturally to pre-Covid levels. Concessionary usage is continuing to plateau and is currently at around 62% of pre-covid levels.

Service provision

- 5.3 As a result of network reviews being undertaken across the county, there have been significant changes to the commercial bus network. The number of registrations submitted in October 2022 was 350% higher than the number submitted in October

2021. Service registration changes have included reducing frequencies and curtailing routes. In many cases, these changes have enabled operators to continue to provide a commercial service in the face of driver shortages.

- 5.4 Over the last year, three predominantly commercial services which were in receipt of de minimis funding from the County Council have been cancelled by the operator as they were no longer considered to be viable. The County Council has considered the requests in the context of its Passenger Transport Policy and Strategy and stepped in with funding on two occasions to ensure that passengers were not left without access to essential facilities and services.
- 5.5 The Council has also been approached on three occasions with requests to support fully commercial services since October 2021. In each case, the Council has considered the request in the context of its Policy and Strategy and declined to provide support. As a consequence, one service was cancelled, the second had its frequency halved and the third had its route curtailed, thus reducing access to facilities and services for passengers.
- 5.6 In spite of the challenging financial climate, the County Council continues to support local bus services in the County. As highlighted, the Council has commenced its own review of the supported local bus network to ensure that all provision meets the requirements of the Passenger Transport Policy and Strategy and that the limited budget is focussed on providing appropriate and affordable solutions which reflects levels of demand.

Ticketing

- 5.7 In collaboration with Leicester City Council, 'Flexi' bus tickets offer unlimited travel on any bus service in the Greater Leicester 'Flexi' zone operated by the main five bus operators in the area. The Flexi zone extends from the city into parts of the county. A range of Flexi tickets is available for different age groups. For part-time commuters, a new '3 days in 7' ticket has been introduced which allows the holder to use the ticket on any three days in a given calendar week.
- 5.8 The Leicester EP digital best fare capping solution which was rolled out in April 2022 covers the Flexizone area which extends into Leicestershire. Users 'tap on' and 'tap off' using a bank card or phone app, with payment then made automatically at the end of the day on the basis of the cheapest fare available for the journeys undertaken across any operator. There is also a weekly 'cheapest fare' cap.

Marketing and promotion

- 5.9 The EP is having ongoing discussions regarding plans for a 'Think Bus' style marketing and promotional campaign to encourage passengers back to the bus. The EP is in contact with neighbouring Local Transport Authorities to learn from their experiences in promoting local bus services, as well as to ensure that opportunities for cross-boundary collaboration are explored and implemented as appropriate.

6. Measures

- 6.1 In spite of the lack of BSIP funding, the Leicestershire EP has made considerable progress in implementing a number of the measures detailed in the BSIP. These measures were all part of the 'Single System' objective of the BSIP – a high-quality integrated and efficient system, with:
- a clearer brand identity and a more holistic approach to marketing;
 - greater coordination between operators' timetables;
 - integration with other travel modes such as rail, cycling, walking and e-mobility; and
 - use of DRT to provide greater availability, particular in rural areas of the county.
- 6.2 Whilst these measures may be considered 'quick wins' owing to their low-cost nature, they require considerable ongoing commitment and compromise from operators in order to deliver them. The measures progressed to date are summarised below:

Measure S1 Timetabling and frequency

Standardising change dates

- 6.3 Under this Measure, all timetable changes were to take place at six set dates in the year to aid user comprehension, these dates to be coordinated with neighbouring authorities in the East Midlands to ensure compatibility.
- 6.4 Significant progress has been made in implementing this EP Scheme. Consultation with operators has demonstrated that some are bound by the school term dates of neighbouring authority areas where their services primarily operate more than the school terms of Leicestershire. As a result, some services will be 'Non-Qualifying Services' for the purposes of this Scheme and opt out, as they predominantly operate in neighbouring authorities whose school terms do not coincide with those in

Leicestershire and Leicester City. The final set of change dates is to be confirmed at the EP Board meeting on 10th November 2022.

Supported network review

- 6.5 Also, within Measure S1, a review was to be undertaken of the whole supported services network, in line with an updated version of our Passenger Transport Policy and Strategy that reflects the BSIP. This will look service-by-service and determine whether / how the network should be re-shaped. Changes will be made as required after appropriate assessments and local consultation. Existing supported services will be maintained whilst this review is being undertaken. This scheme will also provide post-Covid recovery funding support where needed for services that would otherwise be at risk while patronage re-grows to pre-Covid levels.
- 6.6 The review of supported services which commenced in September 2022 is scheduled to be completed around the time of the second annual BSIP report.

Measure S3 Consistent, high quality roadside infrastructure

Audit and standards development

- 6.7 This Measure involved an audit of all bus stops and shelters to be undertaken in Year 1, against a defined list of features that different types of stop should have. Accessibility and personal safety issues with bus stops were to be reviewed and measures identified to provide safe access for a wide range of users (including people with impaired mobility).
- 6.8 A working group was established, comprising three bus operators, County Council officers, the EP Chair, and the EP Manager, to define the types of features that should be present at different kinds of bus stop. This input informed the creation of an audit questionnaire which was utilised for the audit.
- 6.9 The audit took place in August 2022 on a sample corridor in the county. The results of the audit are feeding into the development of a set of roadside infrastructure standards. Operators are to be sent a draft version of the standards document in October for discussion at the EP Board meeting on 10th November 2022.
- 6.10 The audit methodology will be rolled out on a corridor-by-corridor basis going forward. Any proposed improvements that are identified as a result of the audit process will be prioritised for implementation should BSIP funding be made available.

Measure S5 Branding and marketing

EP brand development

- 6.11 This Measure involved using our experience in developing the 'Choose How You Move' brand, to develop a branding design and marketing plan in the first half of Year 1. The aim was to roll it out across all infrastructure in parallel with the upgrading of infrastructure in the second half of Year 1 and Years 2 and 3. The branding will be applied to roadside infrastructure and to publicity and information materials. It will not be applied to vehicles because of potential clashes with existing operator vehicle branding and difficulties this would cause with cross-boundary services.
- 6.12 Progress has been made in exploring adaptation of the 'Leicester Buses' branding adopted by the Leicester EP to make it County-specific. This approach will help to convey the message of a unified offer across the county-city boundary. Application of the branding will feature within the roadside infrastructure standards document, once the brand approach has been agreed by the EP.

Measure S6 DRT

Implementation of digital DRT

- 6.13 The BSIP indicated that in Year 1, Leicestershire's RMF-funded DRT service focussed on the Narborough – Leicester corridor will be operational. In parallel with the first year of RMF service operation, a feasibility study was to be undertaken to look at the potential viability of other locations where DRT could be used to expand the bus offer for poorly served communities.
- 6.14 The 'FoxConnect' DRT service became operational in July 2022 following a Contracts Finder procurement process. The performance of the service is being monitored on an ongoing basis against DfT and local objectives to assess its success. The PTPS review outlined above will include consideration of other areas of the county where digital DRT may offer a more suitable solution than big bus services.

Measure S7 Service quality standards

Customer charter

- 6.15 Under this Measure, a customer charter was to be developed in collaboration between all operators and representatives of the user community and will include remedies for

bus users in the event of failure to meet those standards. This will be in line with guidance published by Transport Focus on customer charters.

- 6.16 A draft Charter has been developed in consultation with bus operators. The final draft of the Charter is to be shared with bus operators in October 2022 with a view to being adopted in November 2022.

Other Measures

- 6.17 The EP has plans to rationalise the qualification ages for child / young persons discounted fare products (Measure A1: Affordability). Whilst it is recognised that such a measure is not necessarily cost neutral for all operators, there is a desire to explore options to arrive at a solution for the EP area.

7. Targets

- 7.1 Owing to the delay in announcement of BSIP funding and Leicestershire receiving no funding from DfT, many measures have not been implemented and are unlikely to be so without BSIP funding. This will have an effect on the targets, but because of fluctuating external circumstances such as COVID restrictions, restrictions with travelling overseas, and transitions in travel patterns, a new stable position has not been reached yet, and therefore it is not possible to understand to what extent this will impact on the targets.
- 7.2 The original BSIP targets are outlined in Table 7-1. These targets will be revisited as part of the wider review of the BSIP (see Section 8).

Table 7-1 BSIP Targets

Targets	2018/19	2019/20	Target for 2024/25	Description of how each will be measured
Journey time	Not available	Not available	5% reduction in average journey time within 2 years on routes subject to bus priority measures under Schemes R1-1 and/or R2-1	Average journey times and journey time variability will be established and monitored for all routes across the county. This will utilise data from GPS-based AVL systems that are fitted to most operators' buses.

Reliability (punctuality)	63.0% ¹	Not available	5% improvement over baseline measurement	Percentage of services departing between 1 minute early and 5 minutes late
Passenger numbers (annual passenger trips)	13.81m	12.73m ²	13.37m ³	Passenger trip numbers will be reported by operators quarterly (and summed to give an annual figure over four quarters) using the exact same methodology as used to report numbers to DfT (as used in Government's annual bus statistics Table BUS0109a). This will ensure values are comparable with past years.
Average passenger satisfaction (overall) ⁴	58.8%	58.0%	61.4%	Satisfaction (very or fairly satisfied) with local bus services (overall) will be measured through the annual National Highway and Transportation Survey (NHT). Infill surveys will be undertaken for 6-monthly reporting. NHT survey is with general public rather than just bus users, so includes non or prospective bus users as well – so gives significantly lower numbers than Transport Focus surveys with current bus users.

8. BSIP Review Plans

- 8.1 Following notification from DfT that Leicestershire had not been successful in securing BSIP funding, the County Council sought feedback from DfT. A follow-up meeting was held with DfT in September 2022 to discuss the feedback in more detail and how the BSIP might better meet DfT's objectives.
- 8.2 As a result of the meeting with DfT, the County Council intends to undertake a wider review of the BSIP through the Enhanced Partnership, which reprioritises the measures. The Council anticipates that this review will be completed in early 2023.

¹ From national bus statistic BUS 0902 (Non-frequent bus services on time)

² Adjusted from actuals to take March 2020 numbers affected by COVID-19 lockdown

³ Based on estimated baseline annual figure for 2021-22 of 12.73m passengers (which will be calculated at the end of the year as set out in Section 3). Targets will be adjusted in line with baseline figure at that point.

⁴ Based on NHT survey with sample of members of the public rather than just bus passengers.

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