GLOUCESTERSHIRE

BUS SERVICE IMPROVEMENT

PLAN (BSIP)

Update Report 2022

Purpose of this Report

The purpose of this report is to explain the progress made by Gloucestershire County Council in the implementation of our BSIP since publication in 2021. We are going to perform a full review of the BSIP for Autumn 2023, this report is to provide the Department for Transport with an interim update.

Introduction

Gloucestershire County Council (GCC) has made substantial progress in delivering the ambitions for bus services first outlined in our 2021 Bus Service Improvement Plan (BSIP). This report summarises the significant investment and improvements GCC has been able to secure and deliver in the year since BSIP publication. This has been achieved against a backdrop of significant challenges to the bus sector. In the absence of additional funding through the BSIP process GCC was able to find some money through a combination of local resources and successful external bids.

GCC ensured that despite significant service cuts from the private sector, accessibility in our rural areas is maintained through a combination of demand responsive services, supported timetabled services and by attracting new bus operators into the county. We are fully committed to a comprehensive transport network that works for all residents and supports economic growth in the county.

In our urban core, GCC is investing £2.6 million pounds in bus priority measures and has this year received planning permission for £20 million investment in our flagship interchange hub project.

Looking into the future, we have started the business case process for a Gloucestershire mass rapid transit scheme that will rapidly reduce journey times in our core urban network, and our Enhanced Partnership is nearing completion.

Gloucestershire's plan is for a decarbonised, innovative, and data-driven transport system that serves and is supported by all people and will level up the opportunities for education and work offered by such a comprehensive offer.

Current Challenges

Like other rural authorities, Gloucestershire has been particularly hard hit by the significant challenges currently facing the bus industry. While bus patronage in Gloucestershire has seen a recovery since the dramatic fall as a result of the Covid 19 restrictions, passenger levels in November 2022 are still only between 70-80% when compared to 2019. Some services have completely recovered and are even outperforming 2019, however some are still not back to the same level. This large drop in passenger numbers presents a significant funding gap for bus service providers on the commercial as well as GCC supported network.

GCC supported the bus network throughout the pandemic and beyond with continued payments under the concessionary fares scheme far above actual use. In April 2022 we secured an 8% inflationary increase to all eligible contracts to help operators with the rising cost of fuel and drivers. GCC also offered significant internal funding towards converting a bus depot to support electric buses as part of a bid to the DfT's ZEBRA fund, but we were not supported in this by our main bus operator.

The well documented national shortage of bus drivers has left Gloucestershire's largest bus operator, Stagecoach, unable to reliably operate their bus service network. This has particularly affected the commercial network which has seen bus service reliability deteriorate dramatically. Our estimates are that on average 25% of trips are not being operated at all, and a significant proportion of the remaining trips are delayed. Particularly severe issues are being reported in the Cheltenham and Stroud areas.

To provide reliable services, Stagecoach announced that they were looking to reduce the overall network provision and refocus driver resource on their core commercial urban network. This has had a very damaging impact on largely rural areas where operator profits are more marginal, but services in Cheltenham and market towns such as Cirencester are also affected. GCC made it clear to Stagecoach that it did not support these withdrawals due to the negative effect on rural areas, however, despite our best efforts the changes have happened. GCC has raised this issue with the Office of the Traffic Commissioner.

We know that rural areas are particularly vulnerable to bus service cuts and residents affected are at high risk of isolation. GCC is working hard to find solutions to soften the impacts of service cuts. Despite the difficult market conditions, we were able to award three replacement contracts and secured an additional four services therefore saving 350,000 trips made per year. We are particularly pleased that we were able to attract a new operator into the County, increasing overall operator diversity and competition. This has come at significant cost to our already stretched budget, and it shows our commitment to rural transport in that we allocated emergency funding.

In addition, our recently launched demand responsive service 'The Robin' will be able to compensate for some of the lost network. This service was made possible thanks to a grant from the DfT's Rural Mobility fund. With The Robin, we are providing a more comprehensive transport network in rural areas whilst also delivering greater value for money than traditional timetabled services.

As a result, the proportion of the bus service network that the council is funding is growing. At the same time, the cost of providing each service is also increasing due to inflation in the cost of delivering bus services, with driver salaries and the cost of fuel being the biggest inflationary pressures.

Taking the Initiative

Despite the national and local difficulties faced by the bus industry GCC is proactively mitigating the impacts of these challenges on its residents and maintaining the ambitions outlined in the BSIP. However, we risk limiting our ability to invest in the transport network with projects such as discounted tickets for young people, as we have to find funding to support lost commercial services and increased procurement costs.

In addition to replacing some of the recent route withdrawals and attracting new bus operator competition into the County, our recent successes in attracting and securing investment in bus infrastructure and services include the following projects, briefly summarised below.

Arle Court Interchange Hub

In the last year, GCC has received planning permission for improvements to Arle Court Transport Hub in Cheltenham via two separate planning applications, one for the highway enabling works and one for the transport hub and multi-storey car park[1]. The improvements will deliver expanded bus services, a multi-modal interchange, improved facilities on site (including EV charging) and better connections to the local walking and cycling network. This facility represents an investment of over £20m in a key local transport hub that will reduce congestion into Cheltenham town centre and provide a focal point for a much improved transport network in west Cheltenham.

Delivering Rural Mobility

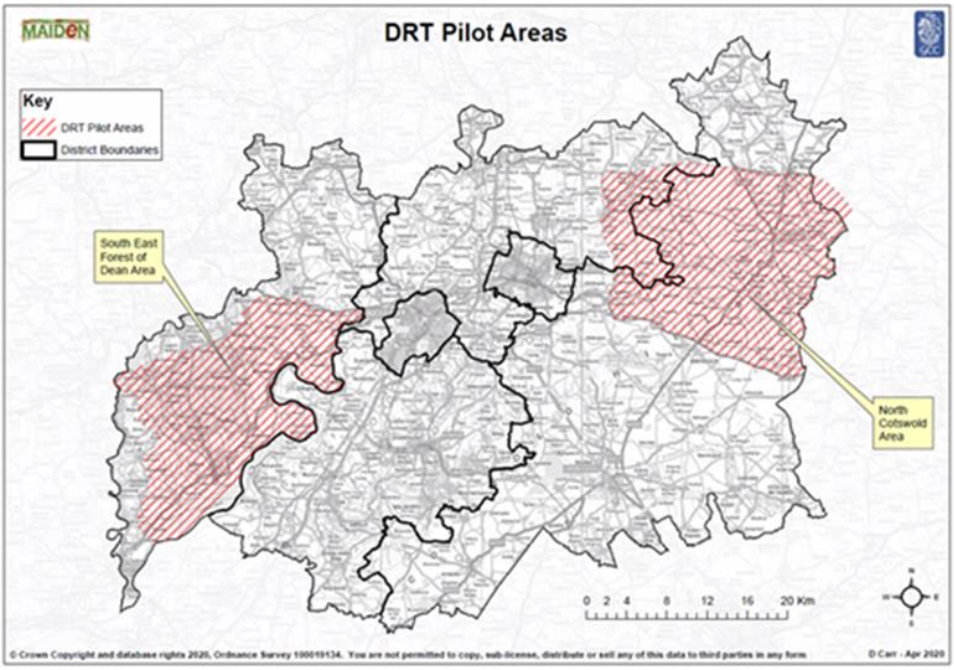
GCC has now launched a demand responsive transport service “The Robin” in the north Cotswolds and the south Forest of Dean, this has been possible by using a grant from the DfT’s Rural Mobility Fund. The Robin creates a flexible transport offer providing access to local service centres, education, employment opportunities and health providers. With the reduced revenue of bus services due to the lasting impact of the pandemic, the increased delivery cost of timetabled transport due to inflation, and the expected pressure on all local authority funding, innovative and flexible solutions to rural transport must be found to ensure rural areas remain connected to the wider county. A key component of this project is the back office booking and routing software provided by Padam. This presents an opportunity to make rural services as efficient as possible therefore cost-effective and provides a basis for expansion to the rest of the community transport dial-a-ride service.

GCC will continue to seek funding to expand this service across other areas of Gloucestershire, to deliver accessible public transport for all residents. It is important to note that this is to complement existing evening and Sunday service levels for the rural areas which is a key component of the Enhanced Partnership and BSIP in recognition that the demand responsive proposals must work together with improved scheduled services. Areas to be considered for future expansion include:

- North Forest of Dean
- South Cotswolds
- Tewkesbury District
- Stroud District

[1] Further information can be found at: www.gloucestershire.gov.uk/highways/major-projects-list/arle-court-transport-hub/

Figure 1 – Demand responsive transport pilot areas



Source: GCC

Planning for the Future

We have been able to allocate £2.6m of GCC money for investment in bus priority measures on corridors and pinch points selected for investment through data analysis and mapping, including the investment we have made in Podaris, a real-time collaborative transport planning tool. This will be a major step in the development of an expressbus network that will see investment in measures targeted at reliability and journey time improvements. This will link rural and inter-urban services into the core corridor of a mass rapid transit system in central Gloucestershire.

Since publishing the BSIP, GCC has successfully bid for £850,000 to develop the Business Case for a mass rapid transit scheme to Strategic Outline Case (SOC) stage, including an options appraisal report and stakeholder engagement.

We are also actively investigating proposals to electrify bus routes and offers of substantial funding to operators to encourage the take up of electric buses, specifically in at least one of our Air Quality Management Areas, where the benefits of zero emission buses would be maximised.

To integrate bus services with other (sustainable) modes of transport, we are developing an interchange strategy, which will provide locations and designs for interchange hubs across the county and identify locations for several smaller interchange hubs in rural areas. These will enable and enhance mode shift between bus, DRT, car, bike, EV, cycle, thus forming the basis of our hub and spoke model.

Gloucestershire's BSIP Targets

Bus Journey Times

Gloucestershire's BSIP sets a target to reduce journey times across the County by 10%. To achieve this, Gloucestershire has secured £2.6 million GCC funding to invest in bus priority measures. In addition, we have started work on an expressbus strategy, as outlined above.

Extended journey times are one of the major barriers to growth in the use of transport in Gloucestershire. We need to reduce them to encourage investment in services from operators, improve financial viability of those services, and to encourage car users to make the change to the bus.

Since the BSIP was published, GCC has undertaken additional analysis to establish the potential for bus journey time improvements for each of the five key bus corridors identified in the BSIP for early development and investment. This analysis looks at key services and their journey time saving potential. Whilst further analysis of actual sectional journey times is required, the case for investment in priority measures on these corridors is strong with significant potential to improve bus journey time by 10% to 15% and the overall attractiveness of bus services.

Bus Journey Reliability

Gloucestershire's BSIP sets a target to improve bus reliability by 5%. To achieve this, Gloucestershire will work with bus operators through the proposed bus board and forum, as set out in the Enhanced Partnership. It will build on the journey time improvement interventions outlined above and ensure that bus services are protected from the adverse impacts of congestion and high traffic levels wherever possible and feasible.

In cooperation with bus operators, GCC will build on the DfT bus service reliability data to analyse Bus Open Data Service (BODS) and real time passenger information data for those bus routes with the highest passenger numbers.

Passenger Numbers

In 2011, 5% of all journeys to work in Gloucestershire were undertaken by bus, compared to 76% by car. It is expected that 2021 census data on the modal share for Gloucestershire will be available shortly and it will be interesting to see if there has been a change to the modal split in the last 10 years.

Gloucestershire's BSIP aims to increase passenger number to 10% above the pre-COVID-19 levels by 2025. At the time of writing the BSIP, it was assumed that bus patronage was about 30% down due to COVID, meaning the target would represent a 40% (30% + 10%) increase from 2018/19 levels. DfT data on passenger journeys on local bus services has now been released for 2020/21 and it seems to indicate that the drop in passenger numbers due to Covid was even more pronounced than originally assumed.

Passenger Satisfaction

The BSIP aims to increase overall passenger satisfaction by 10% by 2025 using the same data, produced by Transport Focus. However, at present, Transport Focus is not available, and officers have analysed National Highways and Transport (NHT)[2] data on passenger satisfaction instead.

For public transport, the survey shows a reduction in public satisfaction for all public transport satisfaction indicators, except ‘provision of bus stops’ (PTQI08) which saw stable satisfaction levels. Of the twenty-seven indicators, seven performed less well than in last year's survey, but better than or equal to the NHT participating member average. Eight indicators were lower than in last year's survey, and slightly lower if compared to the NHT average, with ‘buses arriving on time’ performing particularly poorly compared to last year. A total of twelve public transport indicators were lower than in last year's survey, and considerably lower if compared to the NHT participating member average. This was especially the case with ‘local bus services (aspects),’ ‘public transport information,’ ‘frequency of bus services,’ and ‘the local bus service overall’.

[2] The NHT Network is a performance improvement organisation in the Highways and Transport Sector for members that share a common interest in measuring and comparing their performance. Their website can be found here: Home (nhtnetwork.co.uk)

Looking Forward

Enhanced Partnership

In 2021, GCC published its notice of intent to enter into an Enhanced Partnership (EP). The EP is a legal agreement committing the council and bus operators to delivering improvements to make services more attractive. These include infrastructure and passenger experience elements such as bus shelters, bus priority measures, ticketing, information, timetables, and fares.

The EP will be governed through a Gloucestershire Bus Board and Bus Forum with a view to improving bus services across Gloucestershire. To ensure the EP and Bus Board is putting bus passengers at the heart of its actions, GCC will propose a joint Passenger Charter, to be applied to the entire bus network as one of the first actions of the Bus Board.

Our Ask from Government

GCC has reported Stagecoach to the Traffic Commissioner because of its poor performance in delivering bus services in Gloucestershire. We now need Government support to hold Stagecoach to account and ensure that rural services especially do not suffer an irreparable decline. We also need support from Government to enable us to compel operators to provide reliable long-term data, including passenger numbers and revenue data from commercial services so that we can assess how well a service is doing.

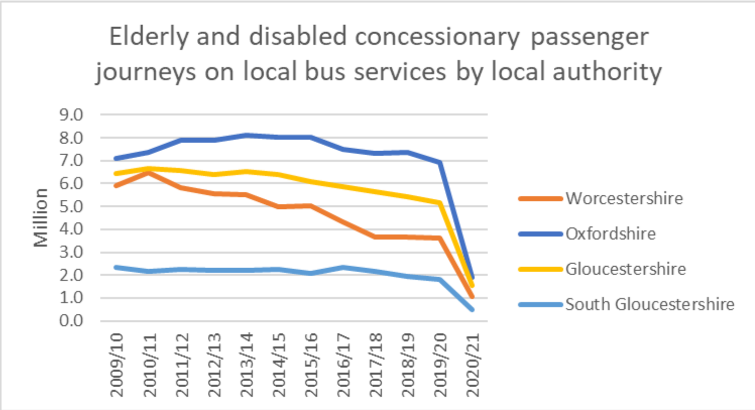
In addition, financial support will be required to invest in bus priority measures to improve journey time and reliability. However, most importantly we need support form Government to ensure public transport remains an option for citizens in rural areas.

Appendix A – BSIP guidance data requested

Type of data requested in BSIP guidance	Provided in BSIP or 2022 update?	Status/location	comment
Bus stop network density	yes	Included in 2022 BSIP update report – chapter 3.4	
Proportion of people within walking distance of a frequent service	yes	2019 data included in BSIP update – appendix D	
Bus patronage levels and trends	yes	DfT annual statistics	
Passenger numbers by route, time of day and ticket type	partially	Currently, the only data available refers to concessionary travel passes.	GCC to discuss with operators
Average fares per km	no	This data is currently not available	GCC to discuss with operators
Granular data on single operator fare volumes for single fares, flat fares such as youth or hopper fares, period passes (daily/weekly/monthly), flexible/carnet tickets, annual season tickets and concessionary passes – including the average price. Also, the use of any multi-operator or through ticketing and the split between cash and electronic payment including concessionary fares	no	This data is currently not available	GCC to discuss with operators
Mileage of bus lanes	yes	Lanes listed and described in BSIP. No 2022 update	
Buses' modal share and how it has changed in recent years; The current bus market share compared to other modes, particularly the private car. This should be split between urban and rural where possible. How the modal share has changed in recent years.	yes	2011 census data modal share is included in the BSIP. No 2022 update. 2021 census data is expected for December 2022.	Further analysis once 2021 census data is available.
data on average bus speeds and how they affect bus operation and use.	yes	Included in 2022 BSIP update report – further analysis can be made available on request.	Further analysis to be undertaken
Bus vehicle speed and congestion data by route and time of day – using GPS vehicle data from operators	no		Further analysis being undertaken for key corridors
Bus average journey times	partial	Some analysis of main corridors based on scheduled data in BSIP update report.	Further analysis in progress
Size and age of fleet	yes	The average age of the bus fleet is c. 9 years.	
information about the local operators and the LTA: is there one dominant operator or a mix of operators?	yes	Market share data is provided in figure 7 In Appendix B	
How many staff does the LTA have working on buses?	yes	There are 7.5 people at the LTA working on buses.	
How much funding does the LTA provide for supported services, other than school services?	yes	Listed in the BSIP. No 2022 update	
Bus service frequency (including days of operation)	yes	Included in BSIP	

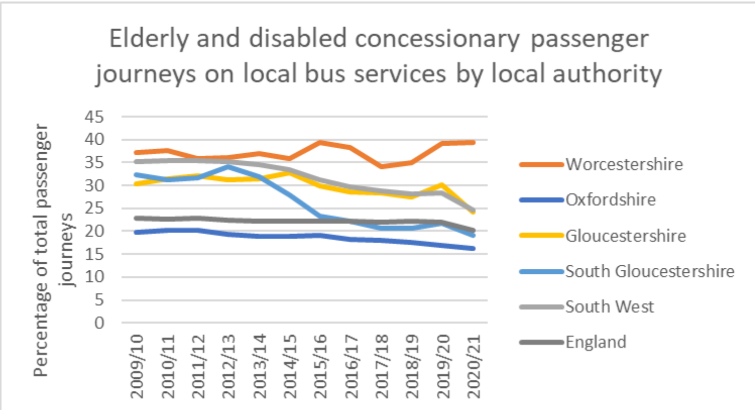
Appendix B – Additional data

Figure 3 - Elderly and disabled concessionary passenger journeys on local bus services (Million)



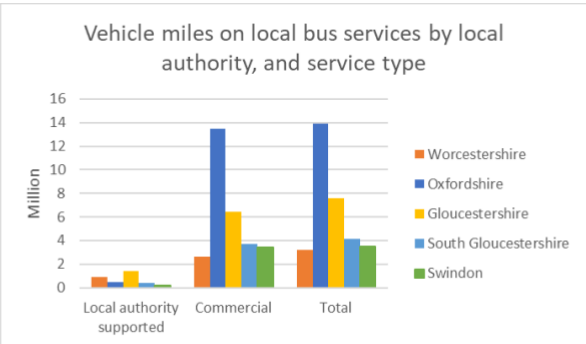
Source: DfT Statistical data set BUS 0113 Local bus passenger journeys (BUS01) - GOV.UK (www.gov.uk)

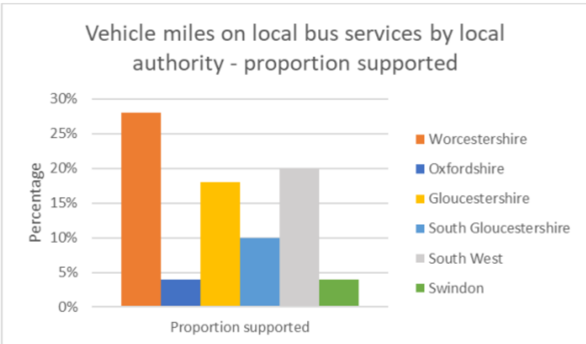
Figure 4 - Elderly and disabled concessionary passenger journeys on local bus services (Percentage of total passenger journeys)



Source: DfT Statistical data set BUS 0113 Local bus passenger journeys (BUS01) - GOV.UK (www.gov.uk)

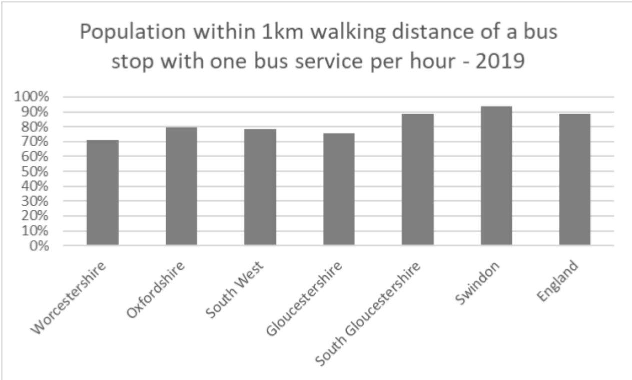
Figure 5 - Vehicle miles on local bus services by local authority, and service type





Source: DfT Statistical data set BUS 0208 Local bus vehicle distance travelled (BUS02) - GOV.UK (www.gov.uk)

Figure 6 - Population within 1km walking distance of a bus stop



Source: DfT Statistical data set BUS 1004 Bus service provision and other tables (BUS10) - GOV.UK (www.gov.uk)

Figure 7 - Operator market share of weekly bus vehicle trips by local authority: England, October 2015 / January 2016

LA Code	Local Authority	Estimated number of operators[2]	Main operator market share	Main operator name	Second operator market share	Second operator name	Third operator market share	Third operator name	Other operators market share
E12000009	**South West**	**117**	***31.1%***	**First**	***24.8%***	**Stagecoach**	***15.1%***	**Go Ahead Group**	**29.1%**
E10000013	Gloucestershire	45	*71.7%*	Stagecoach	*4.4%*	Bennetts	*4.1%*	Cotswold Green	19.7%
	England	**689**	**19.1%**	**Stagecoach**	**15.7%**	**Arriva**	**13.2%**	**Go Ahead Group**	**52.1%**
	England excluding London	**670**	**23.0%**	**Stagecoach**	**17.9%**	**First**	**15.3%**	**Arriva**	**43.8%**

1. A 'bus vehicle trip' is a single vehicle working from the origin to the terminus of a timetabled route. This measure therefore reflects service frequency variations between operators as the more frequent routes will generate a higher number of vehicle trips.
2. This counts all operators with Timetabled services as recorded by Traveline. This can include services provided by Community Transport operators and others not licensed as PSV-operators. Operating subsidiaries of a larger parent are considered as one operator, where they can be identified as such. A small number of operators were unlinked.
3. Figures for October 2015 and January 2016 are based on a combination of the quarterly snapshots of the Traveline National Data Set provided by Basemap.
Snapshots from both quarters were analysed and validated against DfT's annual PSV survey at the local authority level. The final data set used for analysis was based on the coherence of each snapshot at the local authority level to the annual PSV survey.
4. Each quarterly snapshot will vary in terms of routes registered, which may not represent actual change in service provision. Quarterly snapshots are particularly sensitive to the sudden closure of local bus operators.

Source: DfT Statistical data set BUS 1002 Bus service provision and other tables (BUS10) - GOV.UK (www.gov.uk)