



**The Essex County Council Bus Service Improvement Plan
- 6 month Report 2022**

Welcome to Essex County Council's Bus Service Improvement Plan – 6 month Report 2022.

Bus Service Improvement Plans are a key part of the strategy set by Bus Back Better, the Government's national bus strategy published in March 2021. They set out the local issues relating to the bus network and how local authorities will tackle them. You can find Essex County Council's Bus Service Improvement Plan (BSIP) here <https://www.essexhighways.org/getting-around/bus/bus-strategy>

This Bus Service Improvement Report covers the following areas:

- Background: Section 1.
- Measures Identified in the BSIP: Section 2.
- Journey Time (Reliability): Section 3.
- Passenger Recovery: Section 4.
- Passenger Satisfaction: Section 5.
- Development of Future Targets: Section 6.

Background

The key targets we have identified and proposed are to focus investment on the areas we believe will make the most difference to the Essex bus network. These targets will change as we develop and work on our partnership. In the immediate term the focus is on a recovery from the impacts of Covid.

Our priority is to return the bus network to pre-COVID-19 levels of service and patronage, reversing the significant long-term decline. At, at one point during the pandemic bus use fell by around 90% of pre pandemic levels, so this is no small task. To meet it we have to start by encouraging people who gave up using the bus to return to using it as part of their daily life We have therefore, focused our targets around what bus passengers have repeatedly said are the factors most important to them:

- Reliability
- Passenger Recovery
- Customer Service (Satisfaction)

This report highlights our progress on the key targets linked to these factors as set out in our Bus Service Improvement Plan in October 2021 and to test if our strategy is starting to make progress.

Measures identified in the BSIP

Target One: Journey Time (Reliability)

- Reliability is the measure of the bus network's ability to deliver services in line with its scheduled timetables and on time. It is impacted by journeys lost by factors within the operator's control (such as the availability of drivers and vehicles) and by external factors that operators do not control, but be able to plan for, such as congestion and roadworks. It can be measured by the proportion of 'scheduled journeys or mileage' lost and by the proportion of scheduled journeys arriving within the designated window for being 'on time' at stops along the route. due to factors such as traffic congestion. The Enhanced Partnership is intended to deliver improvements in journey time reliability by focusing on this target with Bus Operators and identifying measures to support its improvement. The Council's investment in service infrastructure and bus priority measures will also improve and facilitate the reduction of passenger inconvenience and lost mileage in relation to traffic congestion.
- The challenge we have faced in Essex is the increasing numbers of private vehicles on the road and worsening traffic congestion in comparison with pre-pandemic levels.

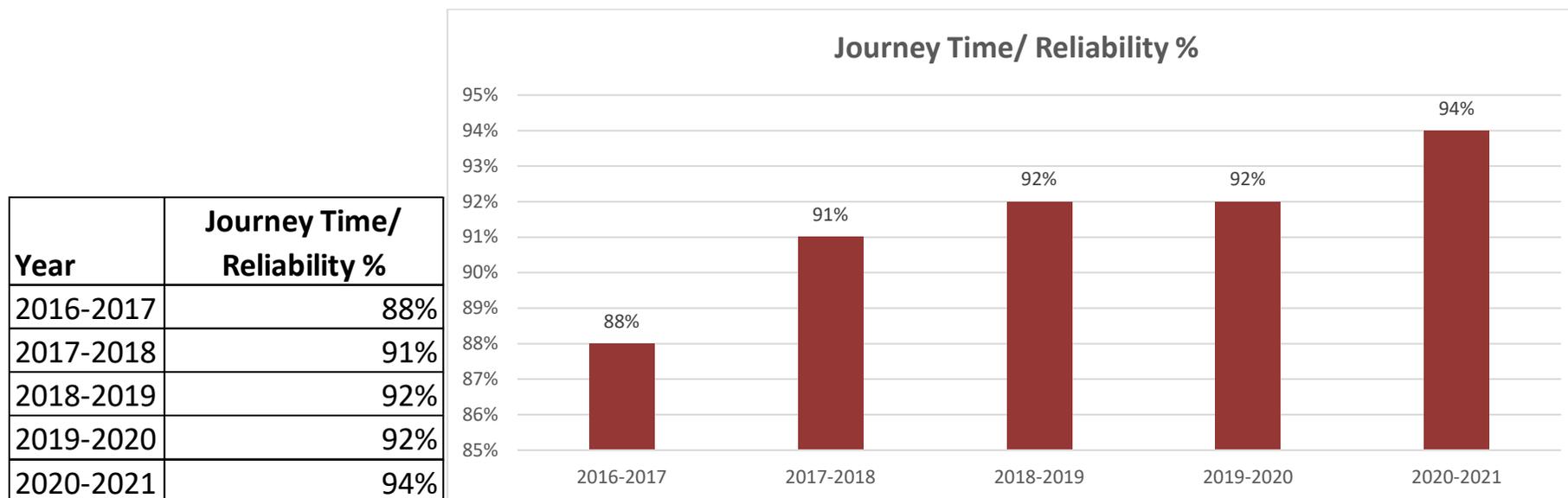
Our aim:

- For reliability to meet the target of 95% of services operating within the statutory window of 1 minute early, 5:59 minutes late- on time target punctuality.
- Our assessment is that our current performance is at 94% (2020-21) but this was during the significantly lower traffic levels of COVID-19. Pre-COVID-19 the baseline level was 92% (2018-20) and 88% (2016-17). This is the range we would expect it to return to initially without intervention.

How we are meeting these targets

The introduction and facilitation of real time information which uses technology to track individual buses is starting to tackle this issue and is a helpful aid in monitoring journey time and reliability. We reported that around 65% of bus services operating in Essex are real-time enabled, since then this figure has been maintained and this will develop with the compliance of Bus Open Data regulations (BODs) which will require more Bus Operators to become real time enabled. However, some operators have begun to use real time data to plan more realistically achievable timetables, rather than rely on broad estimates and this has met with some success.

We do not currently have granular reliability data measures for each of our large urban areas. BODs is still in development and not yet robust enough to report on reliability. As this develops, we are working with BODS to develop these measures, which will be included in future BSIPs as a key measure.



Essex County Council are working in collaboration with Essex Bus Operators to develop key strategies to improve reliability. Because of the lag in collecting data, we will always be reporting on historic performance. Overall, for this first report we are reporting average bus service reliability between 1st April 2021 to 30th September 2021 as 91.1%.

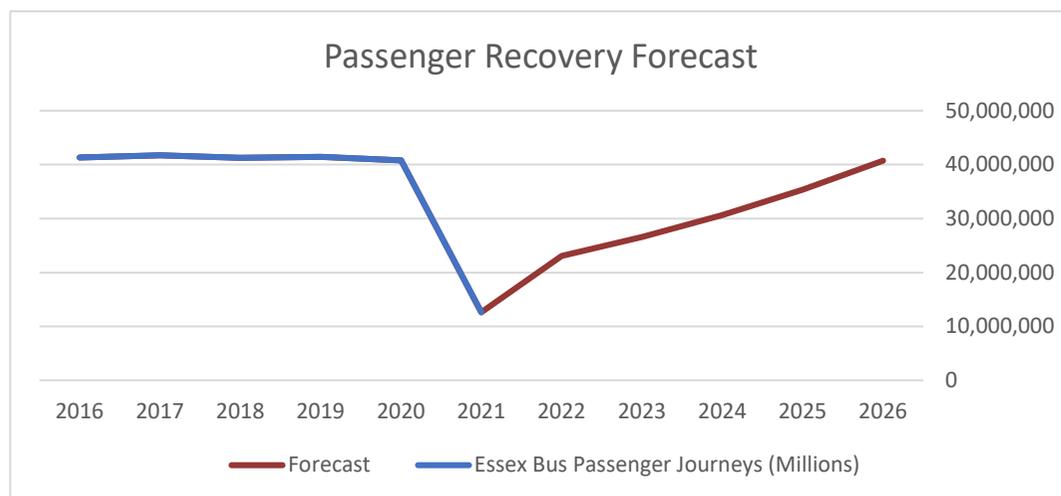
Target Two: Passenger Recovery

- During the Pandemic, the Essex Bus Network has been severely impacted. Passenger numbers declined by 69% for the 2019-20 year, creating a huge challenge for Essex bus operators to maintain services for a post COVID-19 recovery. Even by March 2022, passenger numbers reported by our largest operator had not returned to much above 70% of comparable pre pandemic levels and concessionary bus pass use was little above 50%
- Passenger numbers have varied considerably over the last two years, but so far are showing significant signs of improvement – although still some way away from pre-Covid levels. This has been attributable to less restrictive measures being imposed nationally and the continued provision of higher service levels by operators during the 2021-2022 period.
- We reported in 2020-2021 that we had 12.6 million journeys recorded. Passenger journeys have certainly not yet recovered to our pre-pandemic numbers of 40.7 million in 2019-2020.
- For this report, we have collected passenger numbers between 1st April 2021 to 30th September 2021. Currently during this period, we have seen over 11.5 million passenger journeys in Essex undertaken, a promising look to increase from last year's 12.6 million but not yet to pre-COVID levels.
- We will have a clearer understanding once we have our full year report and collection of figures from Operators to be illustrated in Autumn 2022 as part of the 2022 BSIP.
- We are still expecting the return to pre-COVID 19 levels of patronage to be arduous considering we are coming out of the pandemic and as working patterns are expected to change. We reported the mass homeworking shift has had a significant effect on the frequency of journeys to work being made. As working from home is no longer required, it will be interesting to see how changing travel patterns affect future years.

Our aim:

- For passenger numbers to see a return to pre-COVID-19 levels of patronage of 40.7 million journeys.

How we are meeting this target:



Financial Year	Essex Bus Passenger Journeys (Millions)	Forecast
2015	41,342,995	41,342,995
2016	41,731,831	41,731,831
2017	41,239,583	41,239,583
2018	41,420,643	41,420,643
2019	40,774,681	40,774,681
2020	12,621,495	12,621,495
2021		21,892,082
2022		23,042,624
2023		29,955,411
2024		35,946,493
2025		39,541,143
2026		40,727,377

- Although we are starting to see improvements, Essex Bus Operators do not expect a recovery in passenger numbers to reach much above 80% of pre COVID-19 numbers for some time. Operators are, in the short term, concerned with getting the numbers up to pre-covid levels.
- We are expecting a slow increase in recovery and have used a consistent increase for our forecast.
- Using the six-month passenger figures received April 2021 to Sept 2021, we have forecast an annual figure by doubling the return as the expectation is passengers have been using services at least as much during Sept to March 2022. Although these are Autumn and Winter months, there was an easing of National COVID-19 restrictions.
- Future year forecasts have been based on a straight-line percentage annual increase (+15%) in passenger numbers across Essex to return to pre-covid passenger levels in 2026.
- We intend to support this by developing a publicity/marketing campaign in co-operation with bus operators to encourage both paying and concessionary passengers to return to bus use using funding supplied by the DfT as part of its Covid recovery package.
- This will also be promoted by the development of the single point of call Essex information portal and the new operator branding include in our proposed Enhanced Partnership agreement between ECC and operators.

- We are also going to be looking at improvements to our Essex Saver and Sunday Saver tickets with the aim of making travel by bus across Essex more attractive.

Target Three: Passenger Satisfaction

In our BSIP, we used in our reporting the commissioned annual Transport Focus survey to assess customer satisfaction levels and how we compare to other areas. We have been commissioning this through Transport Focus since 2016.

Our aim:

- For customer satisfaction to maintain an 86% (2019) overall journey satisfaction rating over what we expect to be a volatile time for the network.
- Our current satisfaction rating should be re-assessed in Spring 2022, following the cancellation of intervening surveys due to COVID-19.

Key results

Satisfaction (%)	2016 all satisfied	2017 all satisfied	2018 all satisfied	2019 all satisfied	2019 very satisfied	2019 fairly satisfied	2019 neither /nor	2019 all dissatisfied	2019 base size
Overall journey satisfaction									
All passengers	86	85	80	86	46	40	8	5	795
Fare-paying passengers	78	79	72	82	37	44	11	7	307
Free pass holders	95	95	90	92	58	34	5	3	485
Aged 16 to 34	75	70	70	80	21	59	12	8	96
Aged 35 to 59	85	87	79	82	48	34	10	8	159
Passengers commuting	76	73	68	80	28	51	13	7	186
Passengers not commuting	94	95	89	90	57	33	5	4	580
Passengers saying they have a disability	89	87	78	87	44	43	8	5	258
Value for money									
All fare-paying passengers	46	51	44	53	23	30	17	29	290
Aged 16 to 34	31	41	37	47	23	24	22	31	86
Aged 35 to 59	63	60	54	58	22	36	15	27	133
Passengers commuting	43	43	41	50	19	32	20	30	166
Passengers not commuting	52	67	50	59	30	29	13	28	118
Punctuality and time waiting for bus									
Punctuality of the bus	70	68	61	65	38	27	12	23	700
The length of time waited	70	68	63	69	37	32	13	18	764
On-bus journey time									
Time the journey on the bus took	85	83	81	86	53	33	9	5	795

How we are meeting these targets:

- Although there seems to be a high level of satisfaction with the quality of bus services in Essex, there are areas where improvement is needed if the service is going to meet our targets above. A breakdown of the analysis produced on our behalf by from Transport Focus indicates that the crucial areas where improvement is needed is value for money and service reliability with a particular focus on the 16-34 age demographic.
- Due to the pandemic, our annual commissioned survey did not take place last year, but Transport Focus are expected to conduct a new report in Spring 2022 and ECC intends to participate, the outcomes to be reported in future BSIP reports.
- The district-based Network Reviews being carried out by our Network Review Team as part of our Enhanced Bus partnership with commercial bus operators will identify key bus corridors and congestion hotspots, developing recommendations for bus priority and related measures to help overcome the impact of the congestion on reliability.
- As noted above bus operators will also look to produce better timetables based on actual journey times.

- Improved electronic information based on real-time passenger information developed through BODS and available via the planned ECC one stop information portal will give both current and potential new passengers a better understanding of bus availability and any network issues.
- We will work with bus operators to look at ways for improving the value for money offered by bus services for the 18- to 34-year-old age group.

Future Targets

- As we undertake our network reviews, we also intend to establish the current baseline for the following within a District with a view to developing future targets:

Accessibility figure based on % of population with access to key services by public transport

- For many of our residents the issue is that they have no access to a bus service at all. Simply improving existing provision won't address this directly at all. We therefore want to understand how our areas fare in terms of accessibility and where we might focus support. We can then assess how the measures we put in can change accessibility.
- Our district-based network reviews, part of both the BSIP and EP commitments will include a workstream around accessibility by bus to key services and amenities, aimed at identifying areas where connectivity is poor and developing measure to improve them. We will develop targets around these identified areas based on journeys times to key public services by public transport.

Modal shift % (switch from car to bus)

- As post-Covid travel patterns bed down we want to understand how people's journey choices are changing and how we support more sustainable travel. For many longer journeys in Essex bus is the only real alternative to car. Understanding the new base position for our urban centres and the drivers for those choices will be key to understand how we shape services to offer an alternative to car.
- Developing targets for modal shift will be a longer-term process, we will need to combine measures to promote bus use including those information, accessibility, and attractiveness, with measures to manage the demand for car travel and measures to promote other sustainable transport modes, such as walking, bicycling and e-cycles. This will need to be combined with changes to our approach to planning for new developments and developer funding.