Leicestershire County Council

National Bus Strategy

Bus Service Improvement Plan

Public Engagement

Survey Findings

August 2021

V1-0

itp

a company of **Royal HaskoningDHV**

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1. Introduction

1.1   This report has been prepared by Integrated Transport Planning Ltd (ITP) on behalf of Leicestershire County Council. It presents the main findings of a public engagement survey undertaken by Leicestershire County Council between June 15th and July 30th, 2021. The survey was undertaken primarily as an online survey. However, people were also offered the option of completing and returning a paper copy of the questionnaire. The survey was widely publicised through a marketing and communications campaign devised and run by Leicestershire County Council officers.

1.2   The main purpose of the survey was to find out what local people think would improve local bus services and what would make them use local buses more, to inform development of Leicestershire's Bus Service Improvement Plan (BSIP). This included engaging with people who already use buses and with those who currently don't (collectively termed 'individual respondents' in this report). The survey also invited opinions from representatives of public, private, and voluntary organisations who have an interest in making Leicestershire's bus services work better.

1.3   Within the survey questionnaire (see appendix A), questions were asked about 'local bus services'. As well as buses that operate on a regular timetable, this included 'demand responsive transport' (or DRT). Dedicated school bus services were excluded from the scope of the survey. The survey consisted primarily of 'closed' questions with the opportunity for respondents to express their more detailed thoughts freely, with response to an 'open' question.

2. Respondent Sample Characteristics

2.1 A total of 1,483 responses were received, with 1,428 online responses and 55 paper responses. A small number of representations from individuals were also received outside the main survey. This report contains only analysis of the 'closed' question responses; analysis of 'open' question responses and separate representations will be added later.

Role of Respondent

2.2 Table 2-1 provides a breakdown of respondents by the role in which they were responding. The great majority (~95%) of respondents were 'individual respondents' who were either residents of Leicestershire or visited Leicestershire (for example, for work or leisure). Parish, town, district, or county councillors represented 4% of respondents, with the remainder being representatives of other organisations.

Table 2-1: Numbers and proportions of respondent role

Role of Respondent	Number of respondents	% of all respondents (n=1483)
Leicestershire resident	1370	92.4%
Parish or town councillor	41	2.8%
Visitor to Leicestershire (e.g. for work or leisure)	31	2.1%
District councillor	12	0.8%
Other (please specify)	9	0.6%
Representative of a voluntary sector organisation, charity, or community group	8	0.5%
Representative of a public sector organisation	5	0.3%
Representative of a business or private sector organisation	4	0.3%
County councillor	3	0.2%

Respondents' District of Residence

2.3 Individual respondents (residents or Leicestershire visitors) were asked to provide their full postcode in order to determine their district of residence. 1,336 individual respondents answered this question. There were two responses from residents of Rutland, and 67 respondents from the city of Leicester. The split of responses from Leicestershire residents among the seven districts is shown in Figure 2-1. It is notable that residents of Melton, and Oadby and Wigston, were under-represented in the achieved sample. Results specific to those districts presented in this report therefore need to be viewed with caution because of the small sub-sample sizes.

Figure 2-1: Proportion of respondents per Leicestershire district
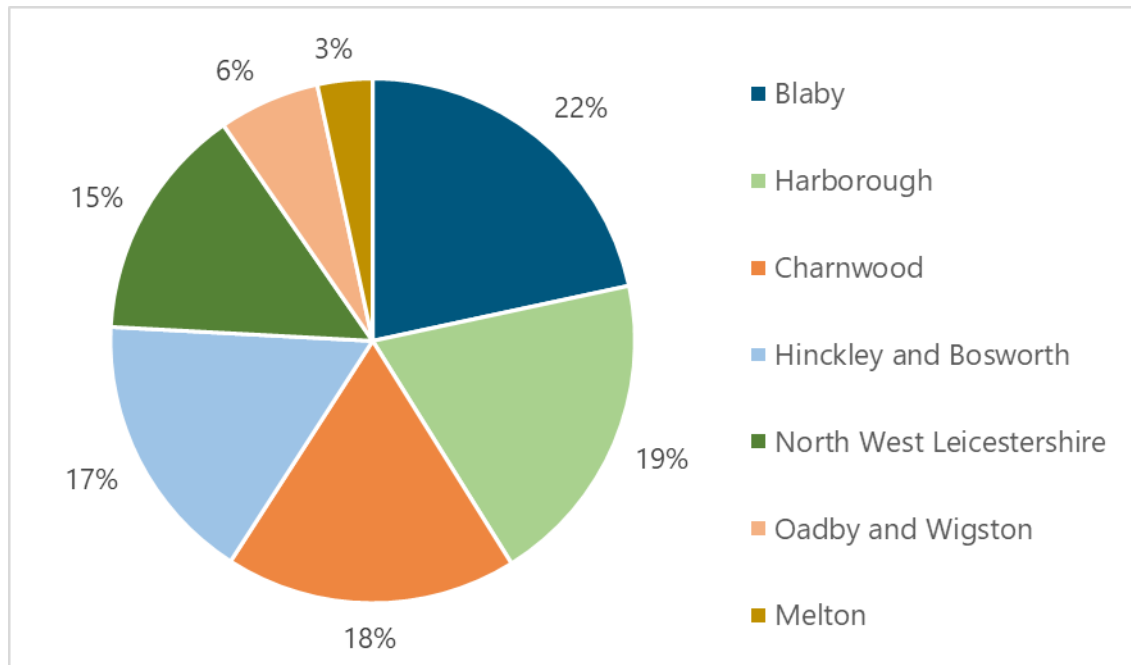
Age and Gender of Respondents

2.4 In terms of gender, the sample was skewed towards females (68%) rather than males (31%). 1% of respondents opted to self-describe. On age, the highest number of responses was received from the 65 – 74-year age group (23%), followed by 55–64-year-olds (19%) and 45–54-year-olds (17%). Only 5% of respondents were under 25 years of age. The breakdown across all age groups and male/female genders is shown in Figure 2-2.

Figure 2-2: Respondents by gender (male and female) and age

Age	Male	Female
85 or above	0.6%	1.1%
75-84	2.8%	7.3%
65-74	8.1%	15.6%
55-64	7.0%	12.2%
45-54	4.1%	12.7%
35-44	3.7%	10.0%
25-34	3.1%	6.0%
15-24	1.6%	3.7%
Under 15	0.1%	0.1%
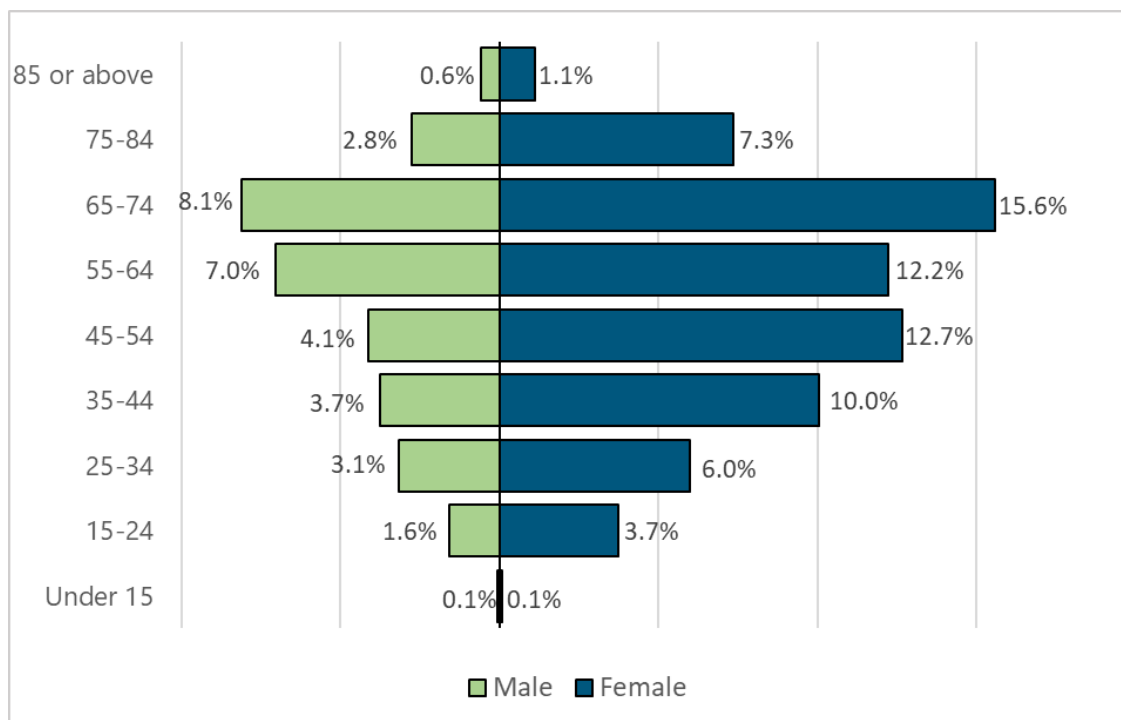
Ethnicity of Respondents

2.5   Individual respondents were asked about their ethnicity. Of the 1,352 people who responded to this question, 93% were White, followed by 3% Asian or Asian British (see Figure 2-3). For comparison, 2011 Census data for Leicestershire indicated that 92% of the population of Leicestershire identified as White.

Figure 2-3: Proportion of respondents per ethnicity

White 93%, Asian or Asian British 3%, Other ethnic group 2%, Mixed 1%, Black or Black British 1%
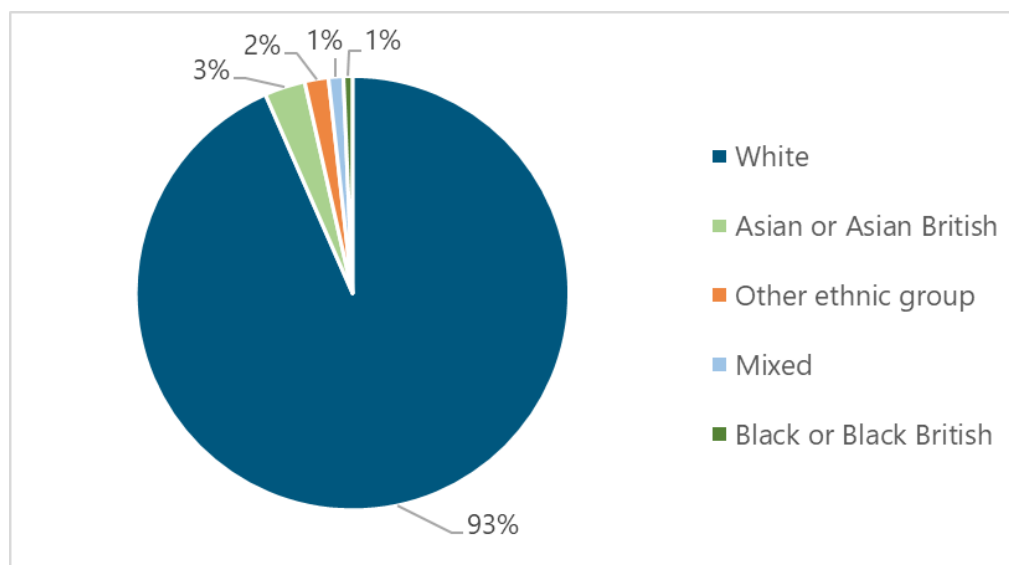
Concessionary passholder status

2.6 1385 respondents answered the survey question about concessionary passholder status. 64% of respondents were not concessionary passholders, while 36% held a concessionary pass.

3. Travel Habits of Individual Respondents

3.1   The survey posed questions about individual respondents' (Leicestershire residents and visitors) pre-pandemic bus usage, including frequency and purpose, and how they expected their frequency of use to change, if at all, following the COVID-19 pandemic.

Frequency of Bus Use

3.2   Individual respondents were asked about how often, if at all, they used a local bus service in Leicestershire, considering a typical week before the COVID-19 pandemic. A breakdown of responses is shown in Figure 3-1 **Error! Reference source not found.**, with only three respondents choosing not to answer. The data was consolidated into two main categories - 'regular bus users' (those who use bus once a month or more) and 'infrequent or non-bus users' (less than once per month or never). Of the 1,398 respondents that answered the question, 63% were regular bus users and 37% were infrequent/non-bus users.

Figure 3-1: Frequency of bus use prior to the COVID-19 pandemic
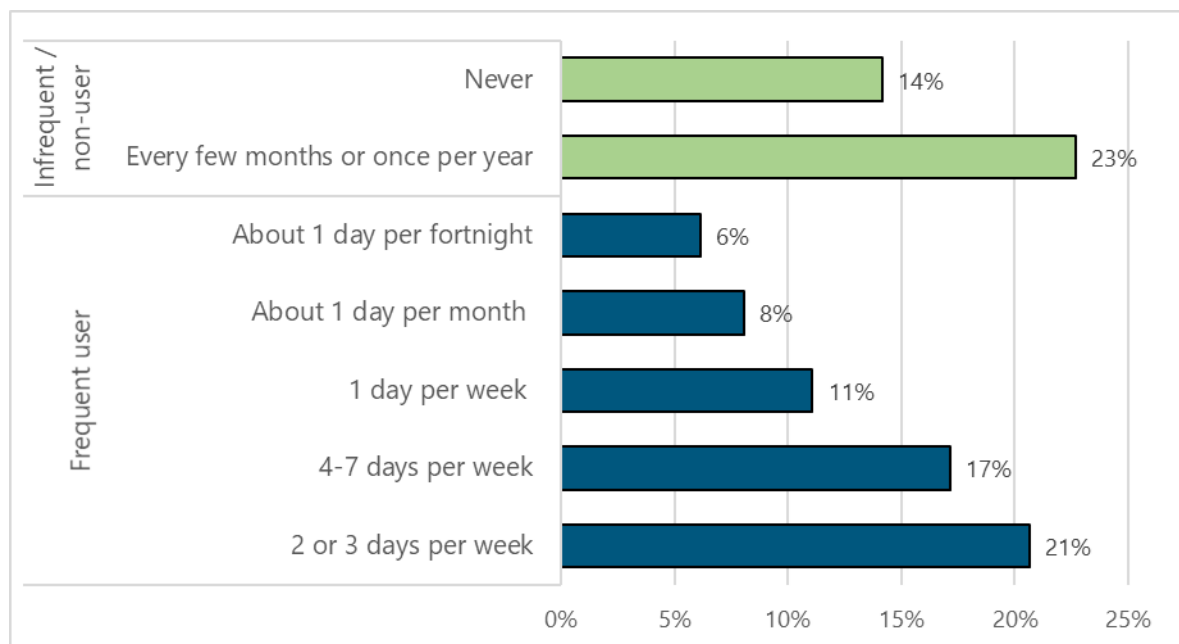
Trip Purpose When Travelling by Bus

3.3   In order to understand the reasons why people use local bus services in Leicestershire, individual respondents were asked to provide their most usual / frequent reasons for

travelling by bus in a typical week before the COVID-19 pandemic. Respondents were able to provide more than one trip purpose, as applicable.

3.4   Excluding respondents that reported they 'never' use local buses within Leicestershire, a total of 1,324 respondents indicated at least one trip purpose (see Figure 3-2). The majority of respondents used the bus for shopping (60%), closely followed by social reasons (58%). Just less than one in four respondents (23%) used the bus to travel to and from work.

Figure 3-2: Leicestershire local bus usage by trip purpose
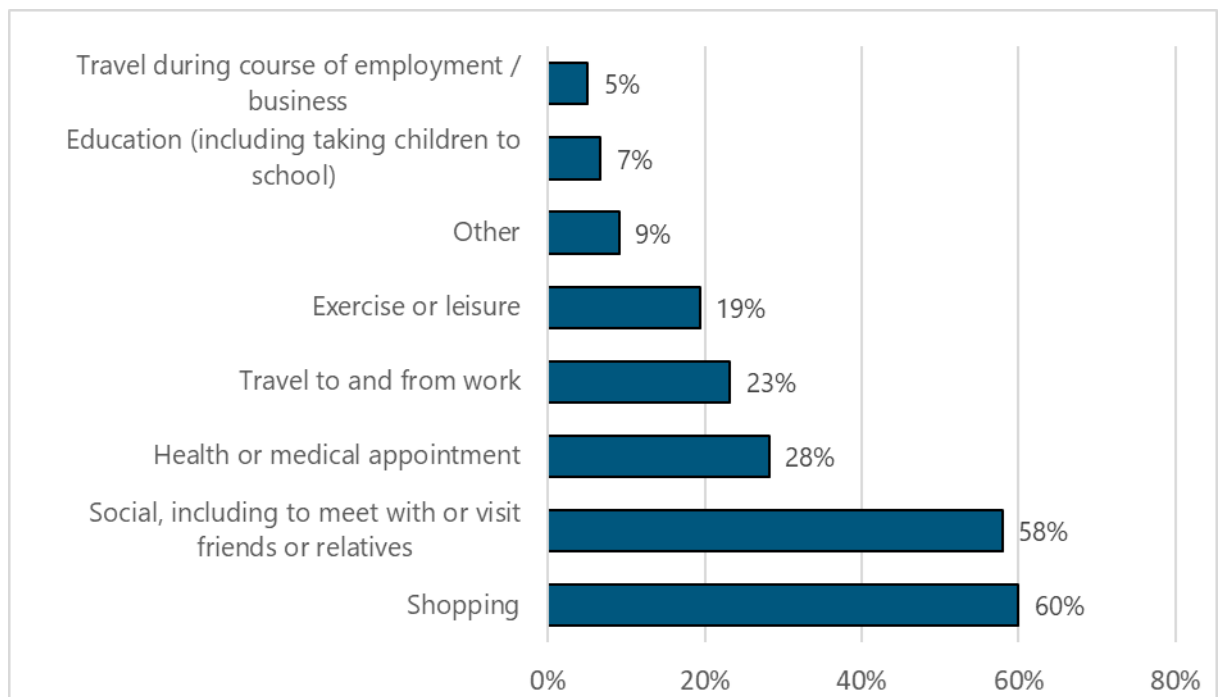
Expected Frequency of Bus Use Following COVID-19

3.5   Individual respondents were asked how they expected their use of local bus services to change, if at all, following the COVID-19 pandemic (compared to how they used to travel prior to the pandemic). A total of 1,394 provided a response, with over half (54%) expecting their bus usage to remain the same. Just over one in five people (22%) expected to increase their bus usage following the pandemic, while 12% expected their bus usage to decrease (see Figure 3-3). 12% of respondents to this question didn't know how their usage might change.

Figure 3-3: Expected bus usage following the COVID-19 Pandemic
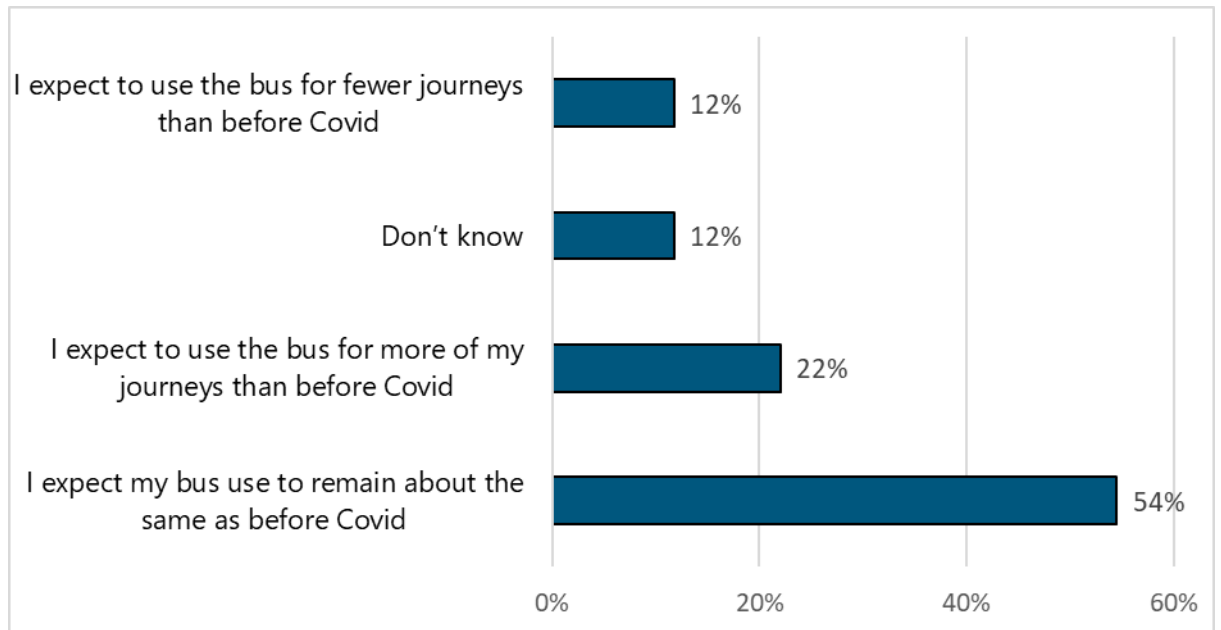
3.6 It is interesting to note that infrequent users were more unsure about their bus use post-Covid than those who regularly travelled by bus (22% compared to 6%), as shown in

3.7 Figure 3-4.

Figure 3-4: Expected change in bus use, comparing regular bus users to infrequent/non-bus users
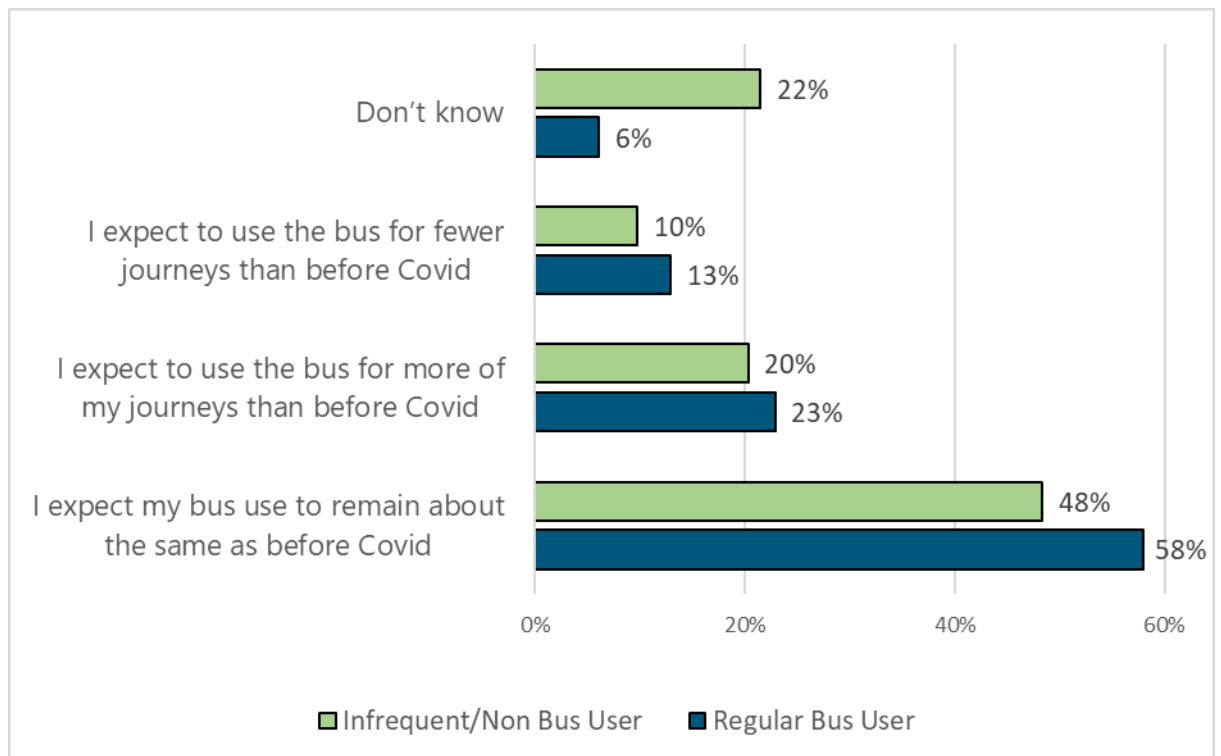
4. Measures to Increase Bus Usage

4.1   A key part of the survey from a BSIP perspective explored what measures would encourage people to use buses more. Individual survey respondents were asked to consider the extent to which 21 different measures would make them personally use local buses in Leicestershire more. Similarly, people responding from organisations were asked their views on which measures would make people whose views they represent use buses more. For each measure, respondents rated the extent to which it would increase their bus use, ranging from 'a great deal', to 'to some extent', to 'not very much' to 'not at all' and finally 'don't know'. The 21 measures were.

- Journey times on local bus services made quicker

- Delays on local bus services reduced to make journey times more reliable

- Local bus services near you operating more frequently

- Local buses near you operating later in the evening or earlier in the morning

- More Sunday bus services

- Local buses near you serving more destinations

- Better connections between bus services and with rail services

- On-demand bus services that could be booked at short notice with an app

- Services operated with more modern vehicles

- Services operated with electric or other zero emission vehicles

- Better availability of Wi-Fi onboard local buses

- Better interior cleanliness of the vehicle

- Better availability of seating

- Better customer service from bus drivers

- Better on-bus information such as 'next stop' displays or announcements

- Lower fares

- Simpler-to-understand fares

- Wider availability of multi-operator tickets (or e-tickets) that could be used on more than one operator's buses

- Contactless fare payment on buses

- Information on local bus services made easier to obtain and understand

- Better bus stops or shelters (e.g., real time information, lighting, seating, CCTV, raised kerbs)

Individual Respondents

4.2 Responses from Leicestershire residents and visitors (individual respondents) are considered within this section. It should be noted that not all respondents provided an answer to all of the 21 measures, so there are varying sample sizes across all measures.

Overall

4.3 Figure 4-1 shows the overall picture from all individual respondents, in terms of people who say that measures would increase their bus use 'a great deal' or 'to some extent'. Measures are presented in order of the percentage of respondents who responded 'a great deal'.

4.4 The top ten measures considered that responding residents and visitors' said would increase their bus use a great deal, were:

- More frequent service (63%)

- Easier access to bus service information (54%)

- More comprehensive service (local buses near you serving more destinations) (50%)

- Better bus stops or shelters (50%)

- Earlier and later services (49%)

- Lower fares (49%)

- Wider availability of multi-operator tickets (45%)

- More reliable journey times (44%)

- Contactless fare payment on buses (44%)

- Better bus service and rail service connections (37%)

4.5 The three measures that residents and visitors considered least likely to increase their bus use included:

- Better availability of Wi-Fi

- More modern vehicles

- Better customer service from bus drivers

Figure 4-1: Measures that would encourage Leicestershire residents and visitors to increase their bus use

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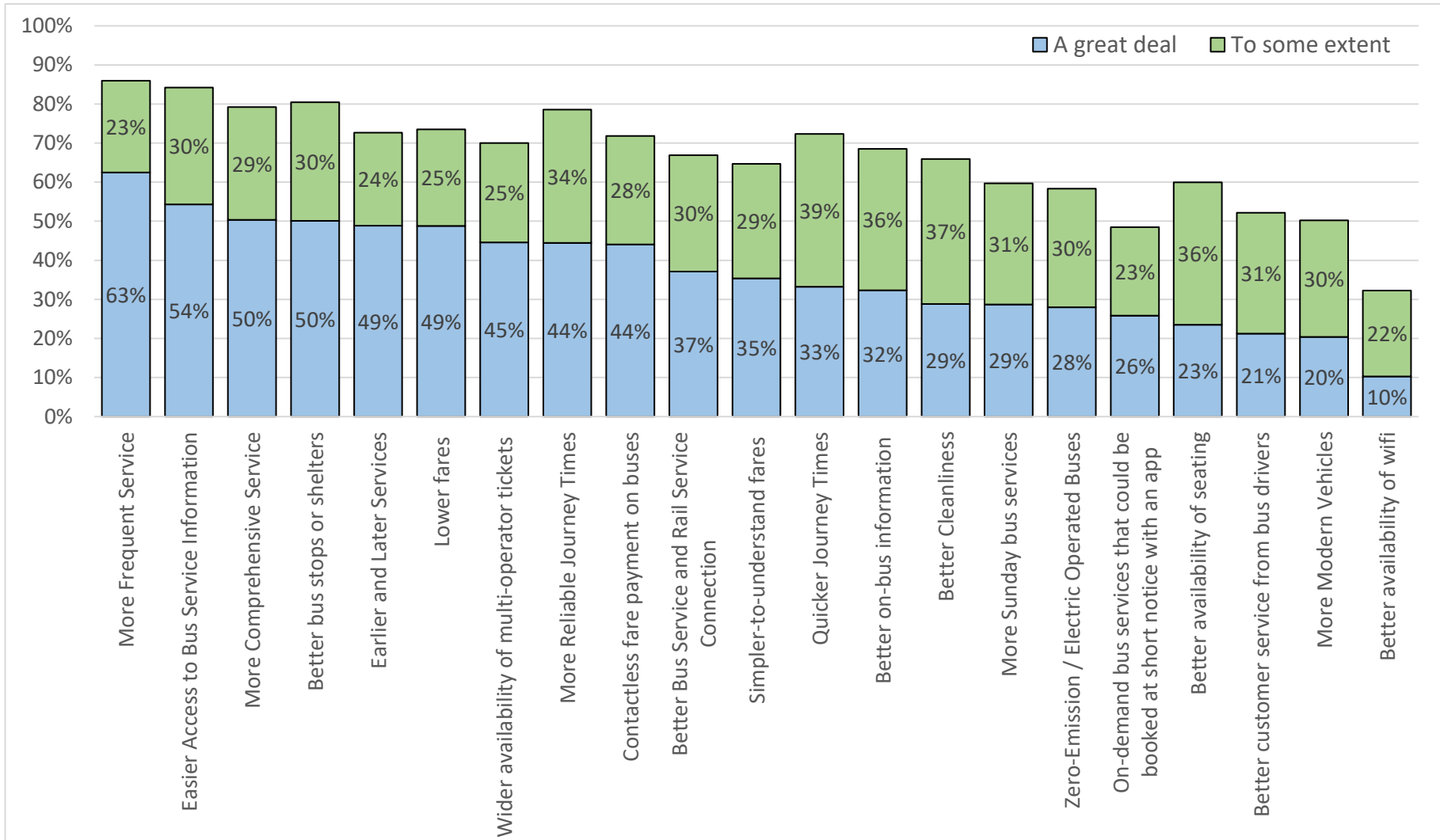
Regular bus users vs infrequent / non-bus users

4.6   Regular bus users (59%) and infrequent / non-bus users (59%) both considered that the measure most likely to increase their use of bus services in Leicestershire was a more frequent service (see Figure 4-2 and Figure 4-3). The top five measures that were considered most effective across both user groups are summarised in Table 4-1. There was agreement across the two groups on three of the top five measures which would increase their bus usage. As well as a more frequent service, easier access to bus service information and a more comprehensive service (serving more destinations) were also considered likely to increase their bus usage.

4.7   There were some notable differences in the perceived effect of a number of measures between regular bus user and infrequent / non bus user groups. The capability for contactless fare payment was considered more effective at encouraging increased bus use for infrequent / non-users than for regular users. Conversely, whilst 55% of regular bus users felt that improved bus stops or shelters would encourage increased bus use 'a great deal', only 42% of infrequent / non-users felt the same.

Table 4-1: Summary comparison of the 'Top 5' measures considered most effective by regular and infrequent / non-bus users

Ranking (based on *'a great deal'*)	Regular User	Infrequent / Non User
1	More Frequent Service	More Frequent Service
2	Better bus stops or shelters	Easier Access to Bus Service Information
3	Easier Access to Bus Service Information	Lower fares
4	More Comprehensive Service	Contactless fare payment on buses
5	Earlier and Later Services	More Comprehensive Service

Figure 4-2: Measures that would encourage regular bus users to increase their bus use
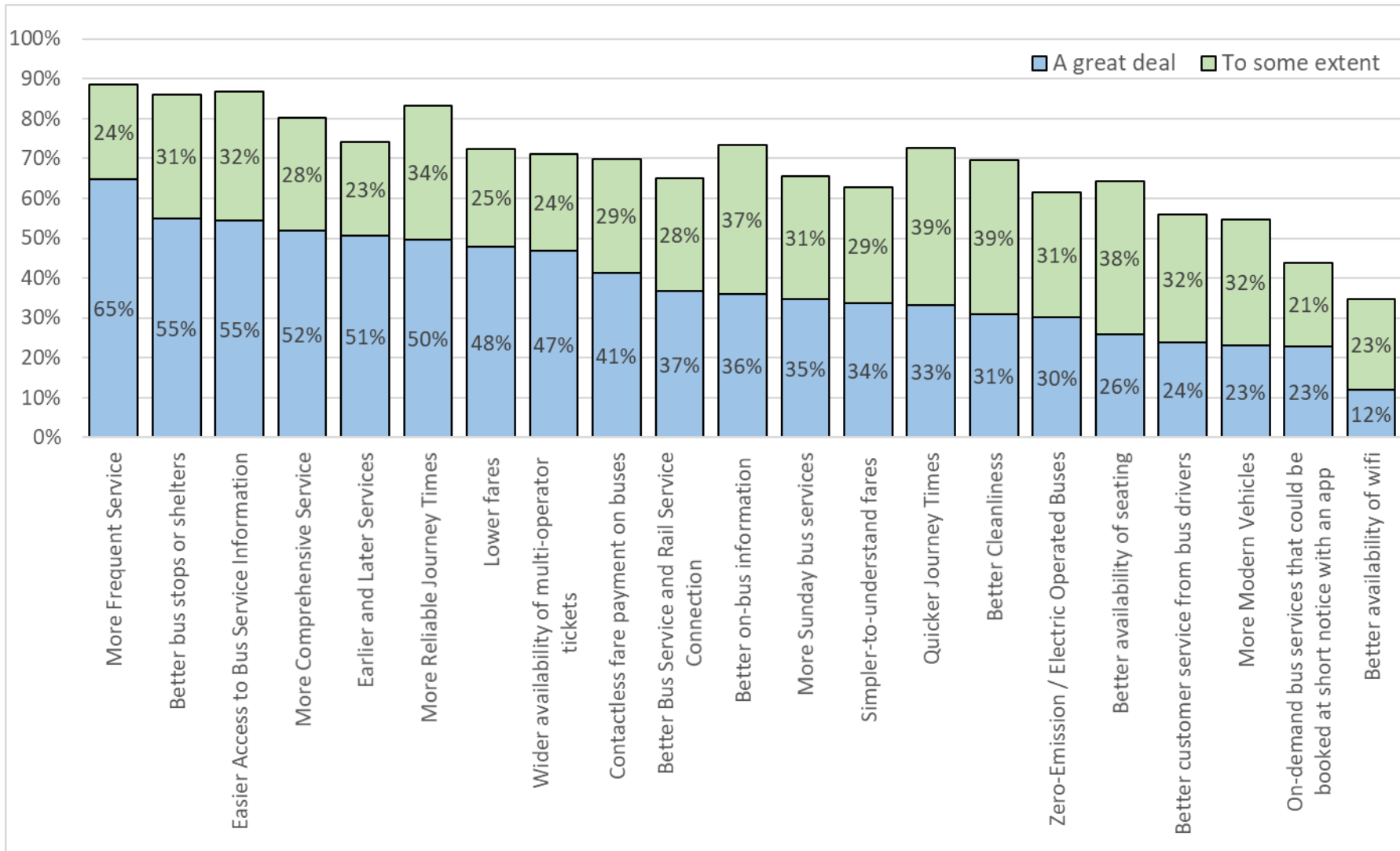
Figure 4-3: Measures that would encourage infrequent or non bus users to increase their bus use
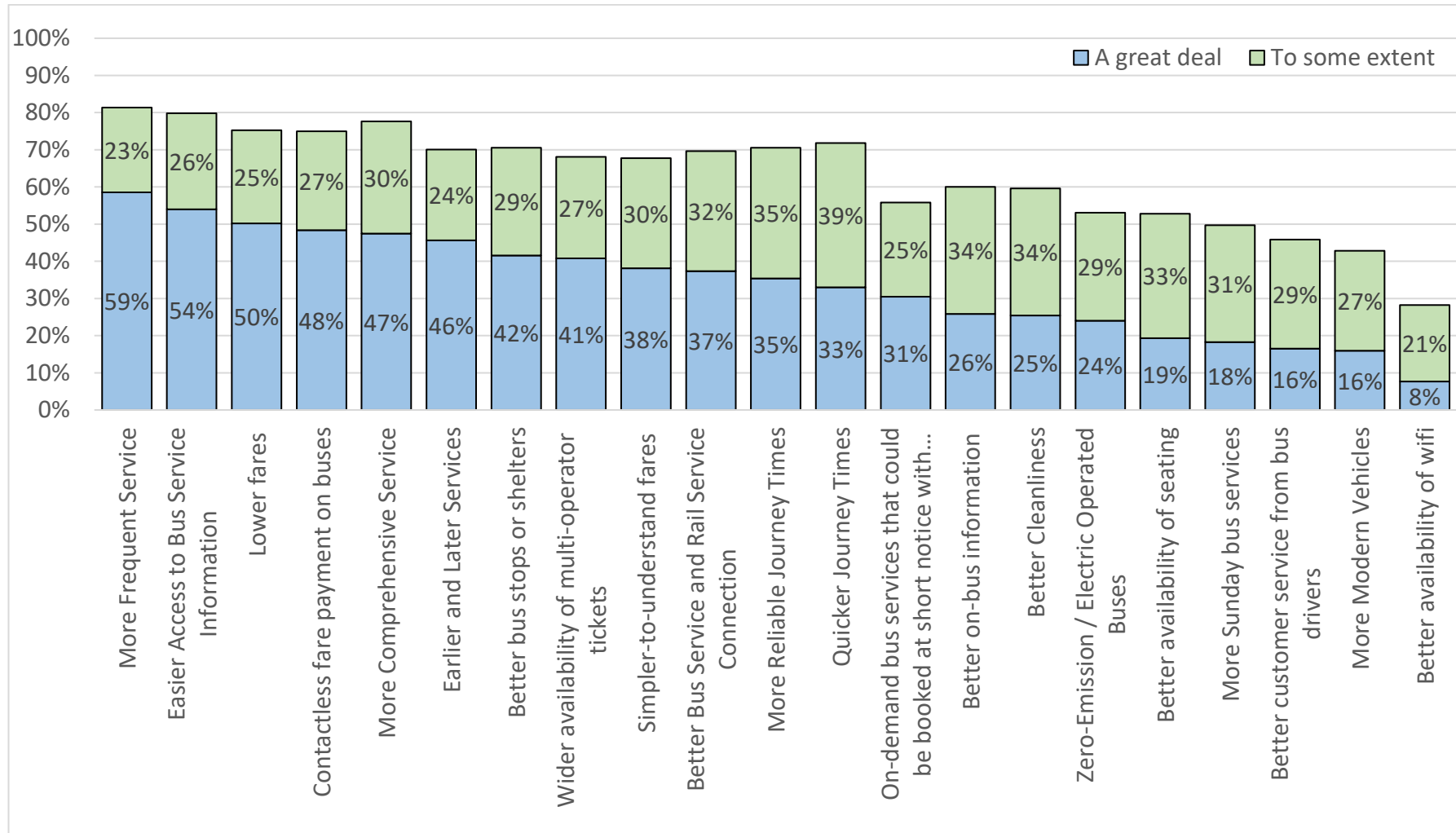
District of residence

4.8 A more frequent service was considered as being one of the most effective measures (where highest proportions of 'a great deal' was recorded) for five of the seven districts: Harborough (70%) Blaby (67%), Hinckley and Bosworth (67%), Melton (67%) and Charnwood (52%). For Charnwood residents, this was very closely followed by 'better bus stops or shelters' where 51% felt that this would encourage them personally to increase their bus use 'a great deal'.

4.9 Only 35% of North West Leicestershire residents perceived a more frequent bus service would increase their bus use 'a great deal' (although 37% considered it would do 'to some extent'). Respondents from North West Leicestershire generally showed a different set of priorities for measures to improve bus use. Respondents from this district considered 'more reliable journey times' to be a more effective measure for increasing bus use than increased frequency, with 62% of residents considering this would increase their bus use by a great deal. More modern vehicles and zero emission vehicles also appeared in the top five most favoured measures in that district.

4.10 The five measures that were considered most effective in increasing bus use by district are summarised in Table 4-2 with a detailed breakdown of responses by 'a great deal' and 'to some extent' reflected in Figure 4-4, Figure 4-5

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Legend: ■ A great deal ■ To some extent

Category	A great deal	To some extent
More Frequent Service	52%	29%
Better bus stops or shelters	51%	31%
Easier Access to Bus Service Information	48%	33%
Wider availability of multi-operator tickets	46%	28%
Lower fares	45%	30%
More Comprehensive Service	44%	34%
More Reliable Journey Times	44%	38%
Contactless fare payment on buses	42%	28%
Earlier and Later Services	39%	29%
Simpler-to-understand fares	32%	31%
Better Bus Service and Rail Service Connection	32%	34%
Better on-bus information	31%	36%
Zero-Emission / Electric Operated Buses	28%	28%
Quicker Journey Times	27%	46%
Better Cleanliness	24%	39%
More Sunday bus services	23%	38%
Better customer service from bus drivers	20%	32%
On-demand bus services that could be booked at short notice with an app	19%	24%
Better availability of seating	19%	43%
More Modern Vehicles	17%	33%
Better availability of wifi	8%	23%

, Figure 4-6, Figure 4-7, Figure 4-8, Figure 4-9, and Figure 4-10.

Table 4-2: Summary comparison of the 'Top 5' measures considered most effective per Leicestershire district

Ranking (based on *'a great deal'*)	Blaby	Charnwood	Harborough	Hinckley and Bosworth	North West Leicestershire	Oadby and Wigston	Melton
1	More Frequent Service	More Frequent Service	More Frequent Service	More Frequent Service	More Reliable Journey Times	Quicker Journey Times	More Frequent Service
2	Easier Access to Bus Service Information	Better bus stops or shelters	Earlier and Later Services	Easier Access to Bus Service Information	More Modern Vehicles	Simpler-to-understand fares	Earlier and Later Services
3	More Comprehensive Service	Easier Access to Bus Service Information	Easier Access to Bus Service Information	More Reliable Journey Times	More Comprehensive Service	Better on-bus information	More Comprehensive Service
4	Lower fares	Wider availability of multi-operator tickets	Better bus stops or shelters	Better bus stops or shelters	Better bus stops or shelters	More Comprehensive Service	More Reliable Journey Times
5	Better bus stops or shelters	Lower fares	Contactless fare payment on buses	Earlier and Later Services	Zero-Emission / Electric Operated Buses	More Modern Vehicles	Better Bus and Rail Connection

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Figure 4-4: Measures that would encourage residents of Blaby to increase their bus use
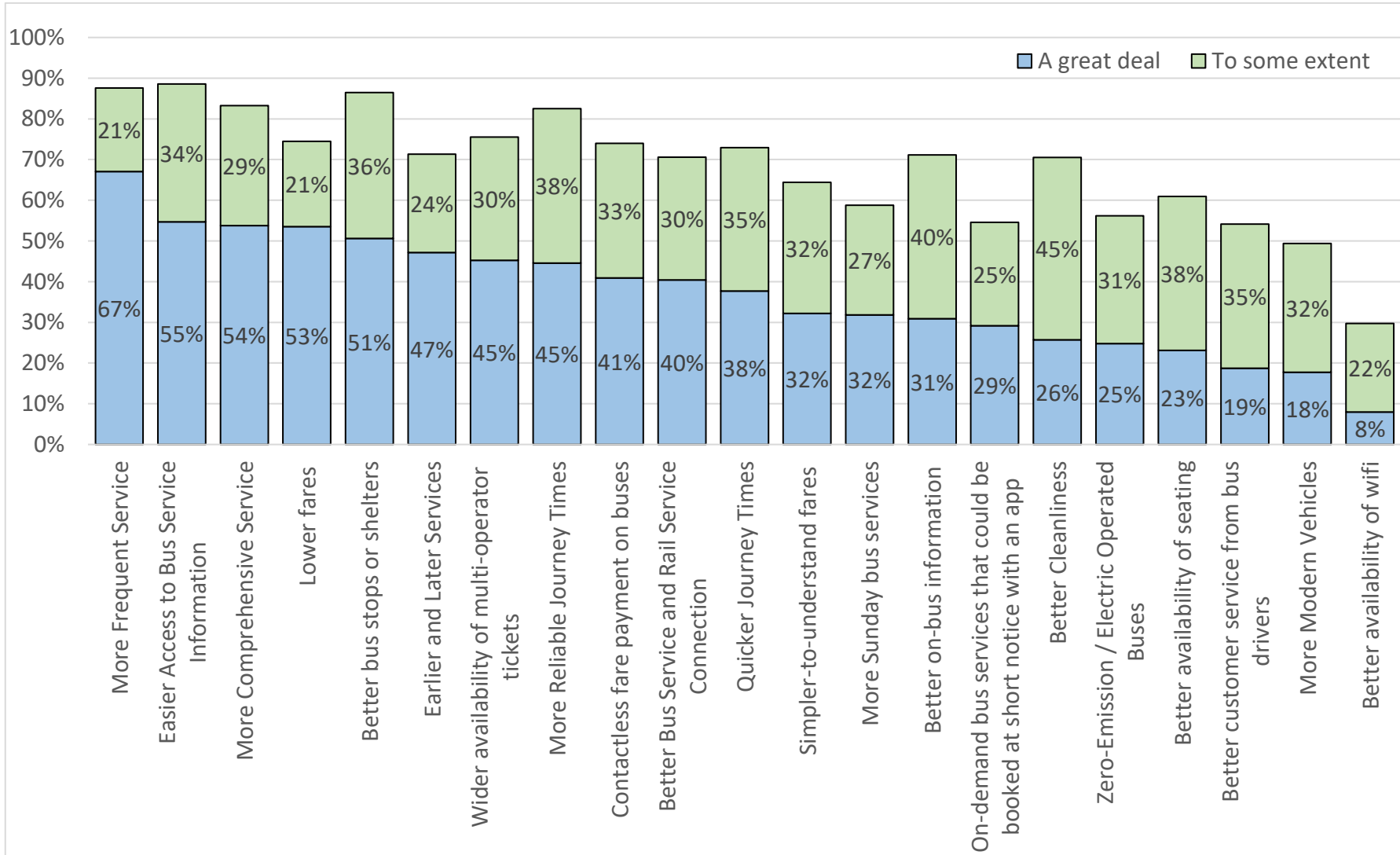
Figure 4-5: Measures that would encourage residents of Charnwood to increase their bus use

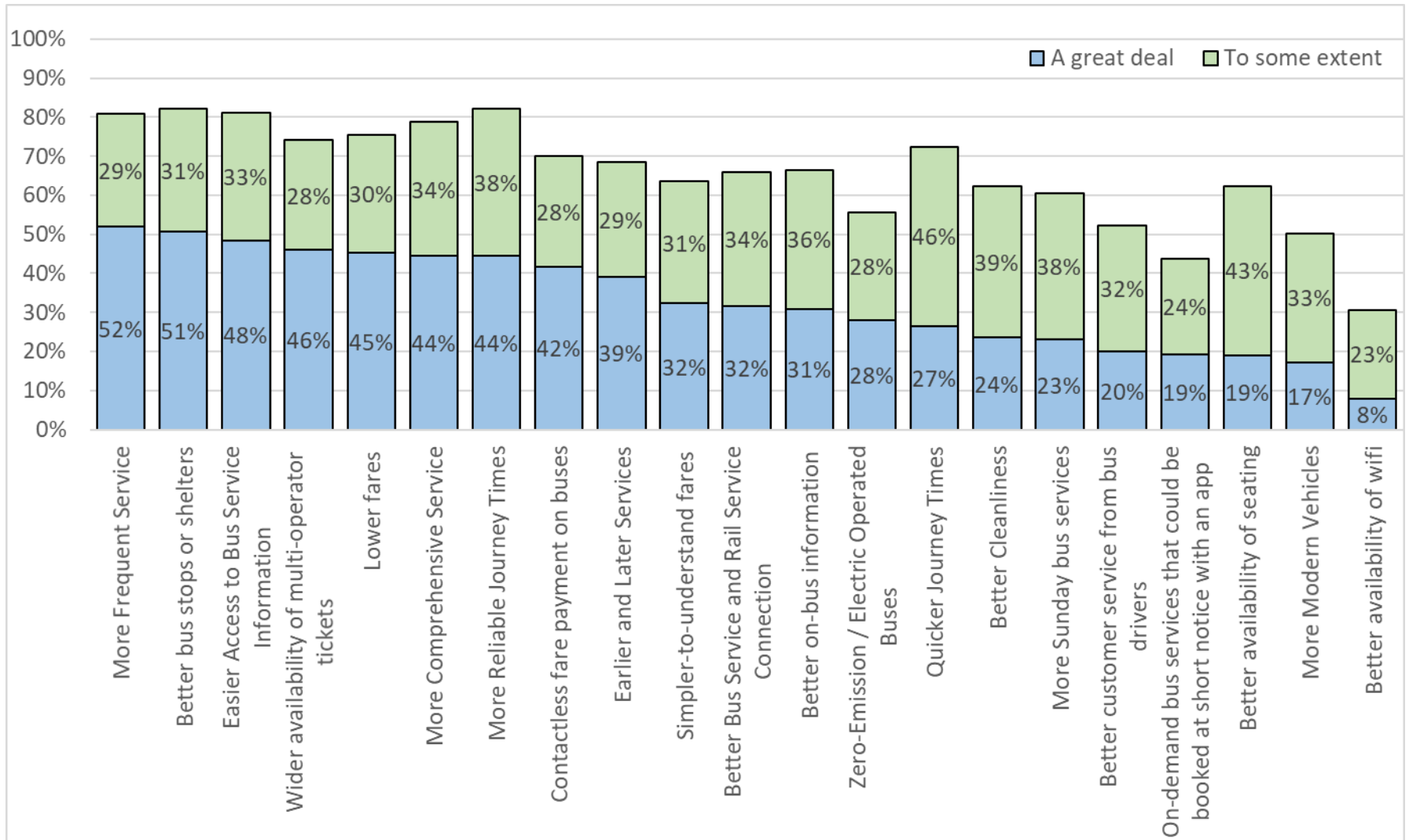Figure 4-6: Measures that would encourage residents of Harborough to increase their bus use

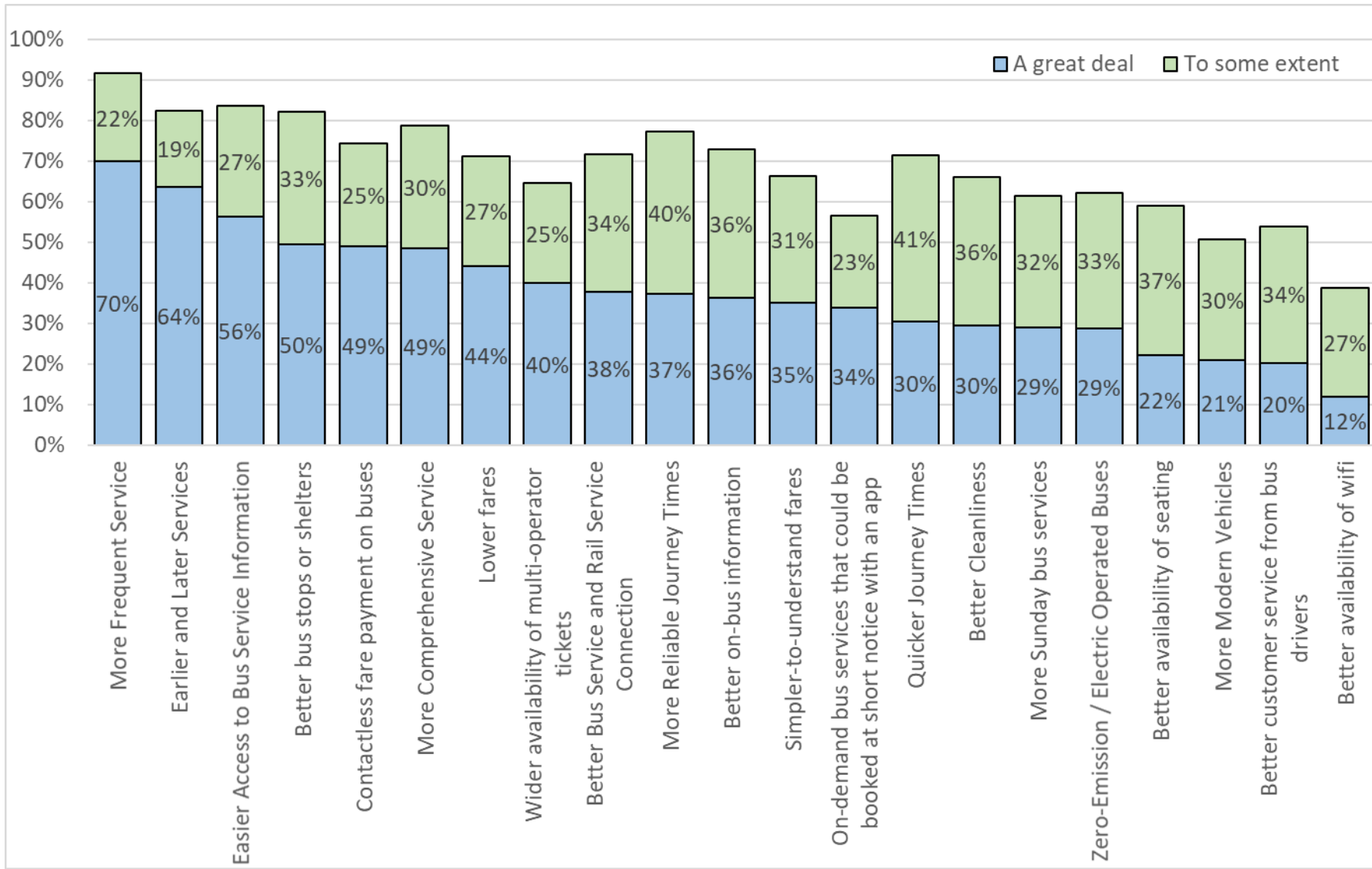Figure 4-7: Measures that would encourage residents of Hinckley and Bosworth to increase their bus use
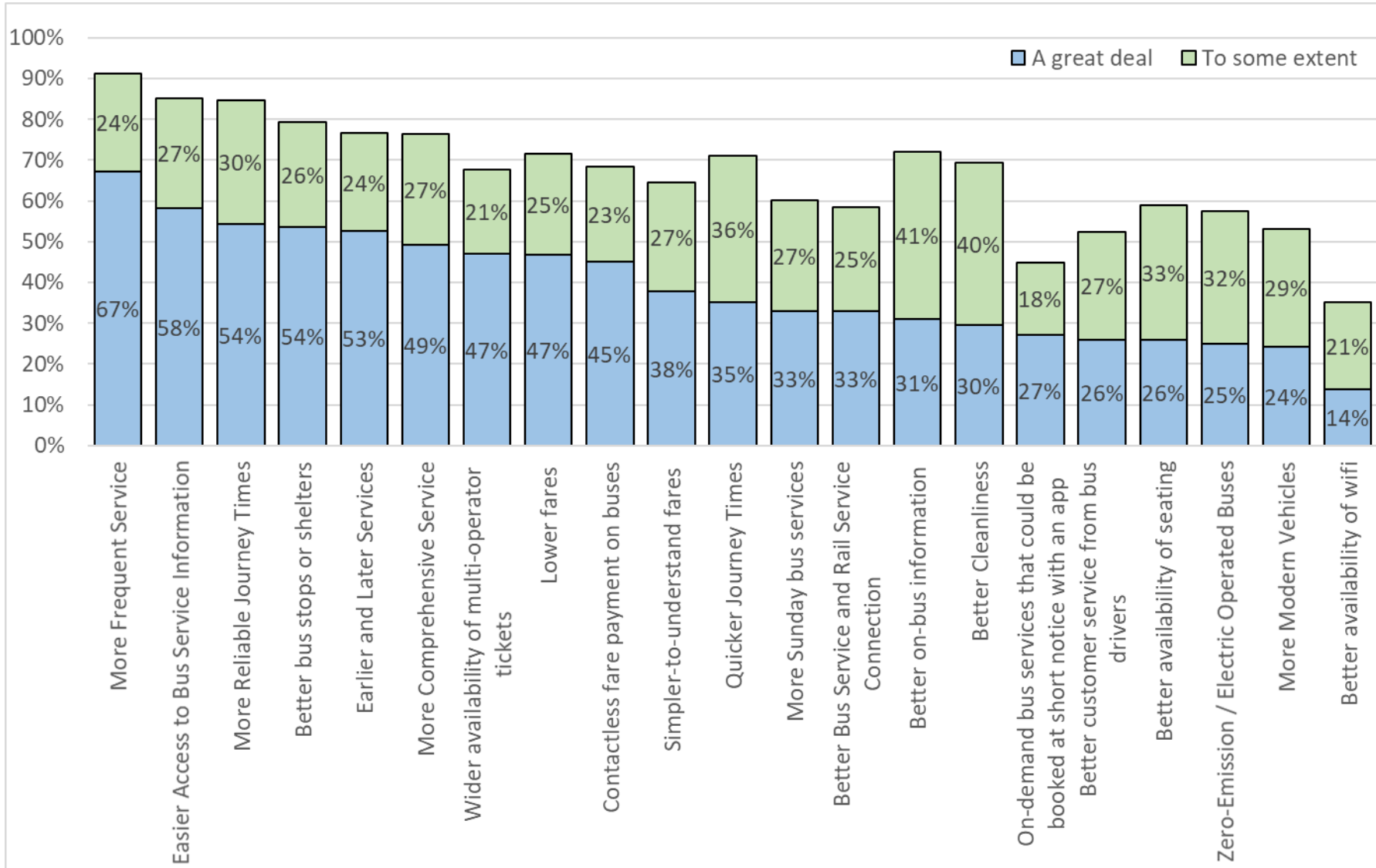
Figure 4-8: Measures that would encourage residents of North West Leicestershire to increase their bus use
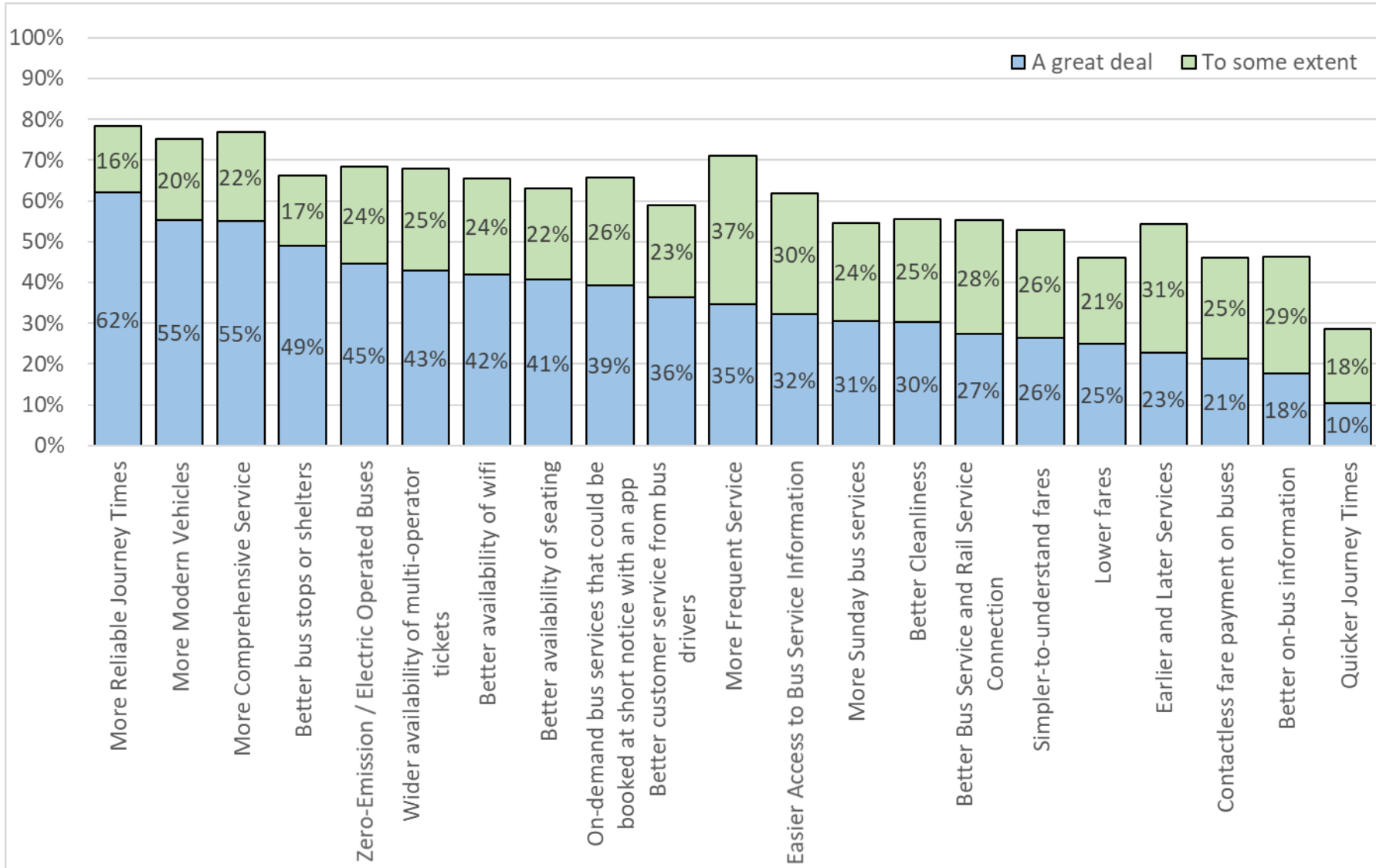
Figure 4-9: Measures that would encourage residents of Oadby and Wigston to increase their bus use
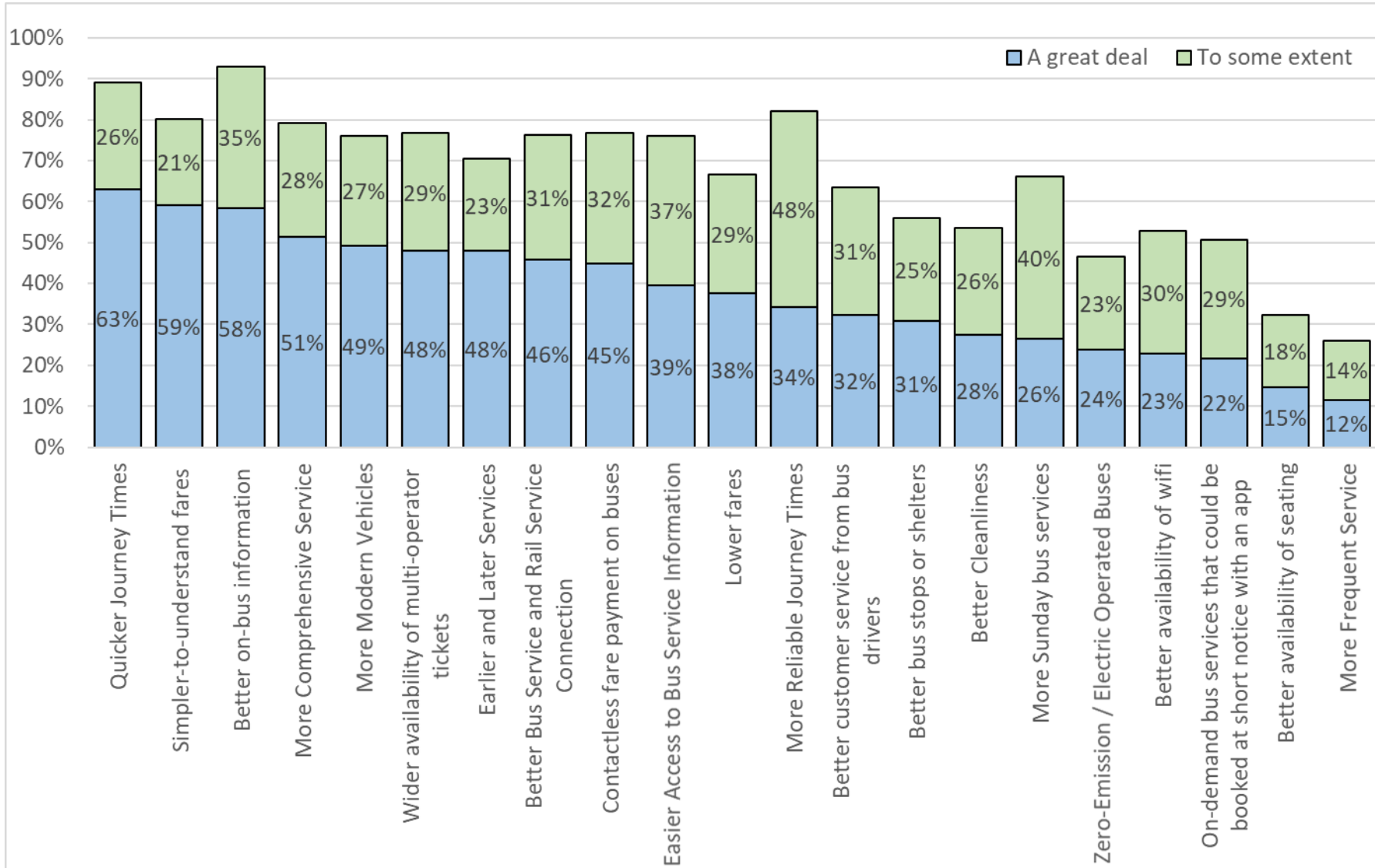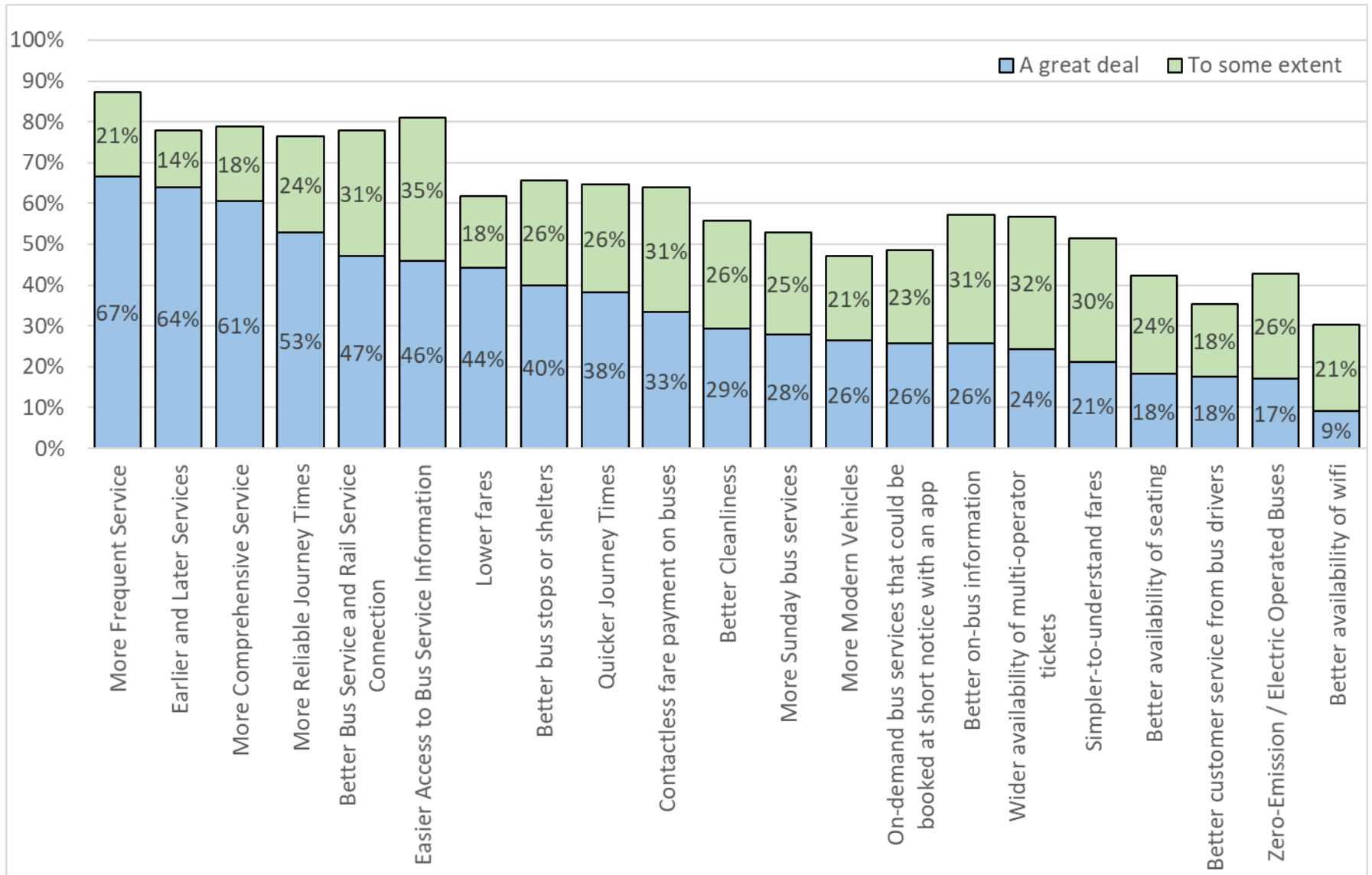
Figure 4-10: Measures that would encourage residents of Melton to increase their bus use

Age group

4.11 This section details the measures that were considered by respondents from different age groups to be the most effective in encouraging them to increase their bus usage within Leicestershire. For the purpose of this analysis, the age groups were combined as follows:

- Under 25

- 25 – 44

- 45 – 64

- 65+

4.12 Similar patterns are generally seen across all age groups with measures considered most effective (where higher proportions of respondents rate a measure by 'a great deal') relatively consistent. A comparative summary of the 'Top 5' measures considered most effective at increasing bus use per age group is shown in Table 4-3, with Figure 4-11, Figure 4-12, Figure 4-13 and Figure 4-14 providing a more detailed breakdown across all measures by 'a great deal' and 'to some extent'.

4.13 A significant proportion (72%) of under-25's perceived that their bus usage would increase by 'a great deal' with the implementation of lower fares. This measure was also considered effective by the 25-44 and 45-64 age groups but to a lesser extent (57% and 53% respectively). In comparison, only 34% of respondents over the age of 64 perceived lower fares would increase their bus use by 'a great deal', as the majority of this age group would be eligible for free travel for most of their journeys via the English National Concessionary Travel Scheme (ENCTS). Views on earlier and later bus services also differed between younger and older age groups, with a consensus between under-25s, 25-44s and 45-64s (over 55%) considering this measure would increase their bus usage by 'a great deal', compared to only 33% of those aged over 64.

4.14 Respondents within the older age groups (45-64s and over 65) placed more importance on having easier access to bus service information than those in the younger age groups (under 25 and 25-44). This measure was perceived as most effective by those over 65, with 60% considering this would increase their bus usage by 'a great deal'.

4.15 All four age groups were consistent in their views on the measures that may have little effect on increasing their bus usage, with the smallest proportions across all measures

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deeming that better availability of Wi-Fi would increase their bus usage by 'a great deal'.

Table 4-3: Summary comparison of the 'Top 5' measures considered most effective per age group

Ranking (based on *'a great deal'*)	Under 25	25-44	45-64	65+
1	Lower fares	More Frequent Service	More Frequent Service	Easier Access to Bus Service Information
2	More Frequent Service	Lower fares	Earlier and Later Services	Better bus stops or shelters
3	Earlier and Later Services	Earlier and Later Services	Easier Access to Bus Service Information	More Frequent Service
4	Wider availability of multi-operator tickets	Contactless fare payment on buses	Lower fares	More Comprehensive Service
5	Better bus stops or shelters	More Comprehensive Service	Wider availability of multi-operator tickets	More Reliable Journey Times

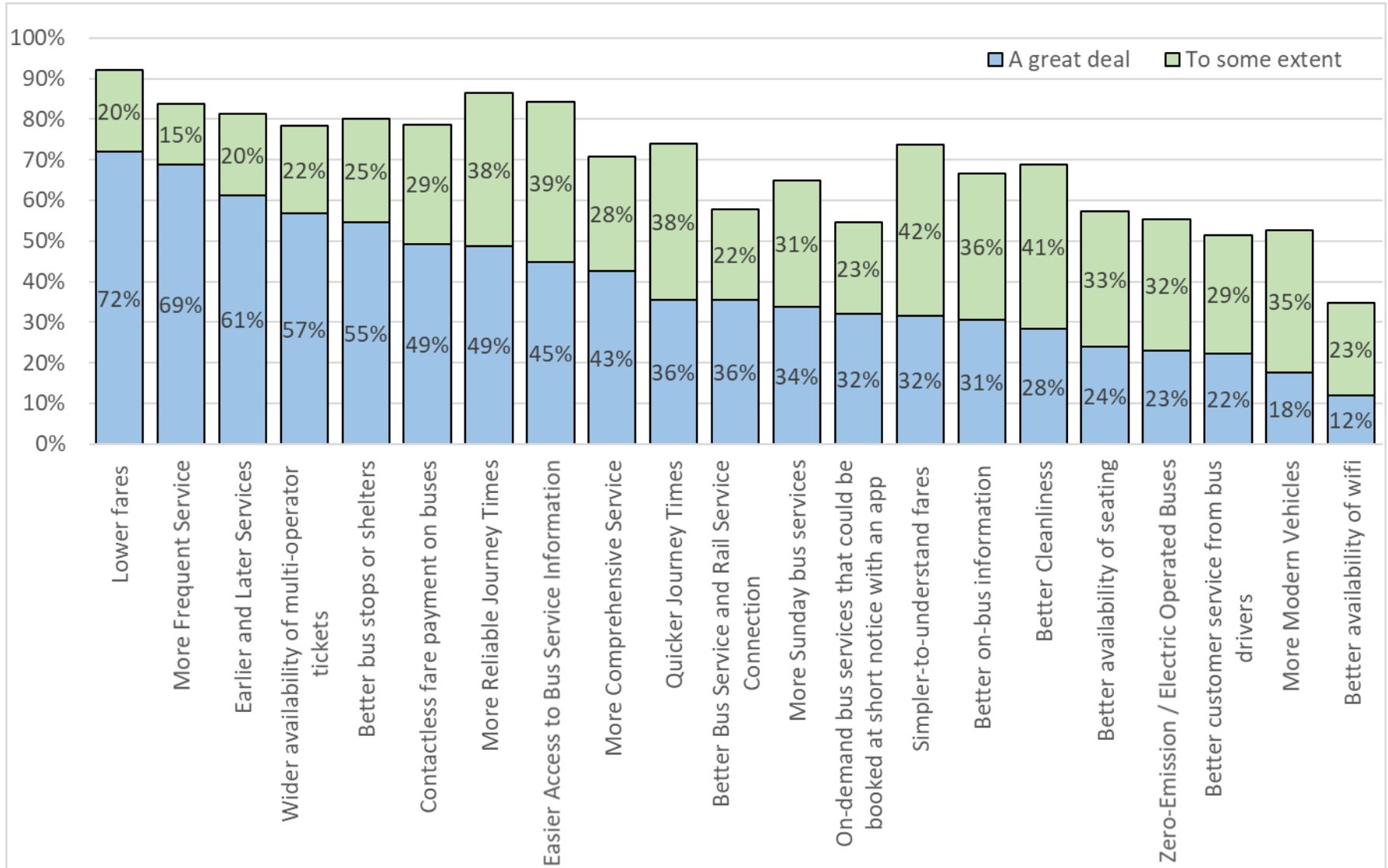## Figure 4-11: Measures that would encourage under-25's to increase their bus use

Figure 4-12: Measures that would encourage 25–44-year-olds to increase their bus use
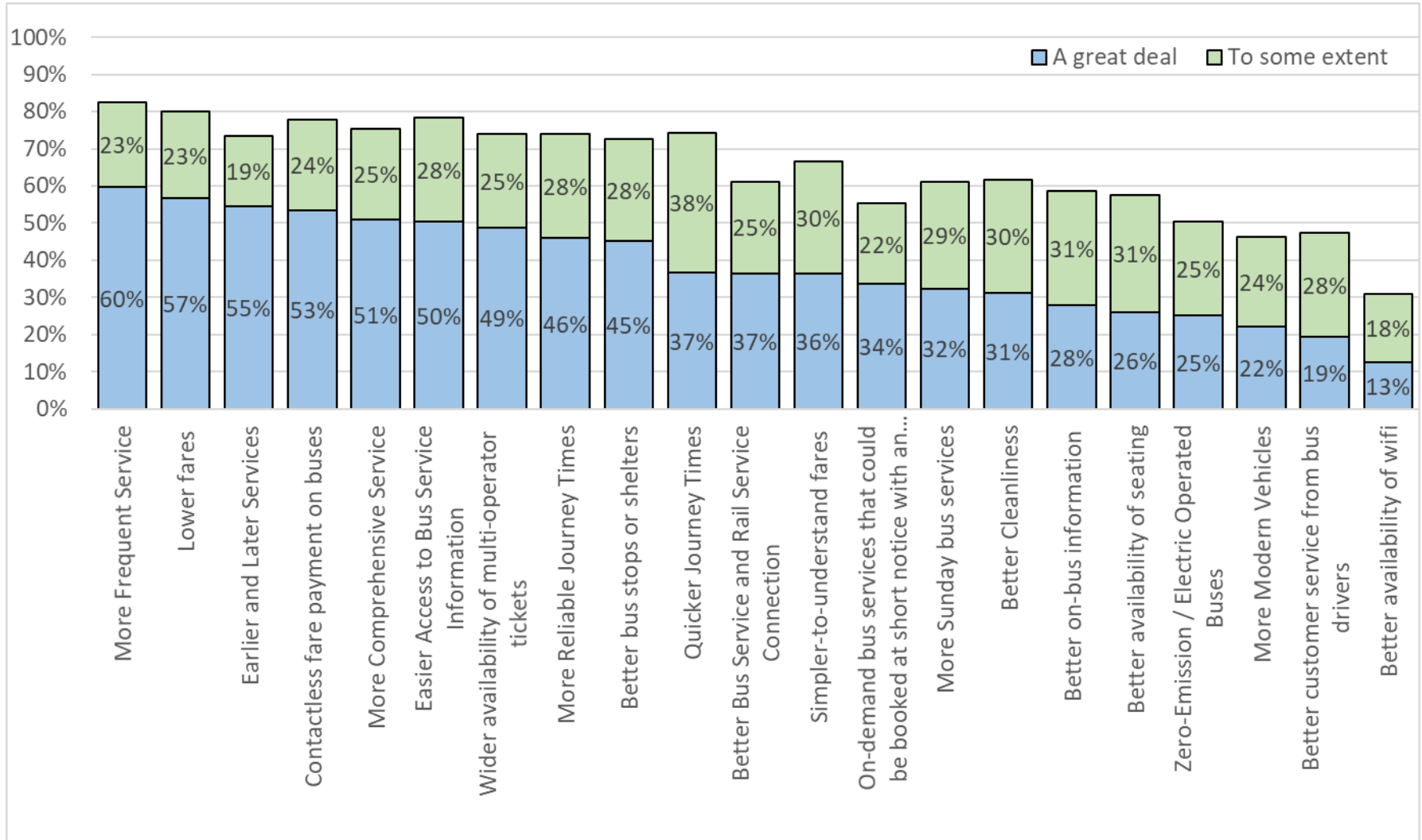
Figure 4-13: Measures that would encourage 45–64-year-olds to increase their bus use
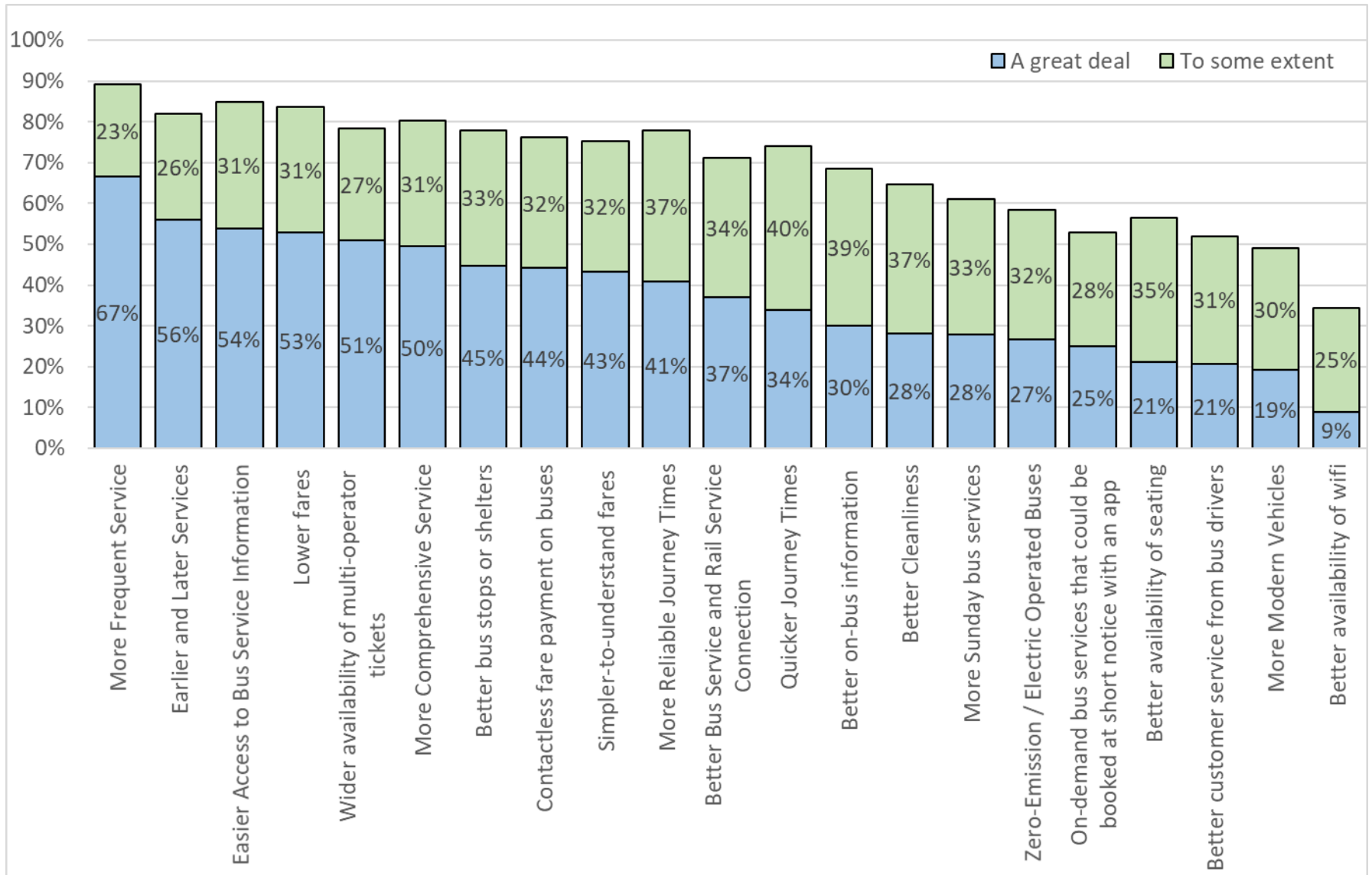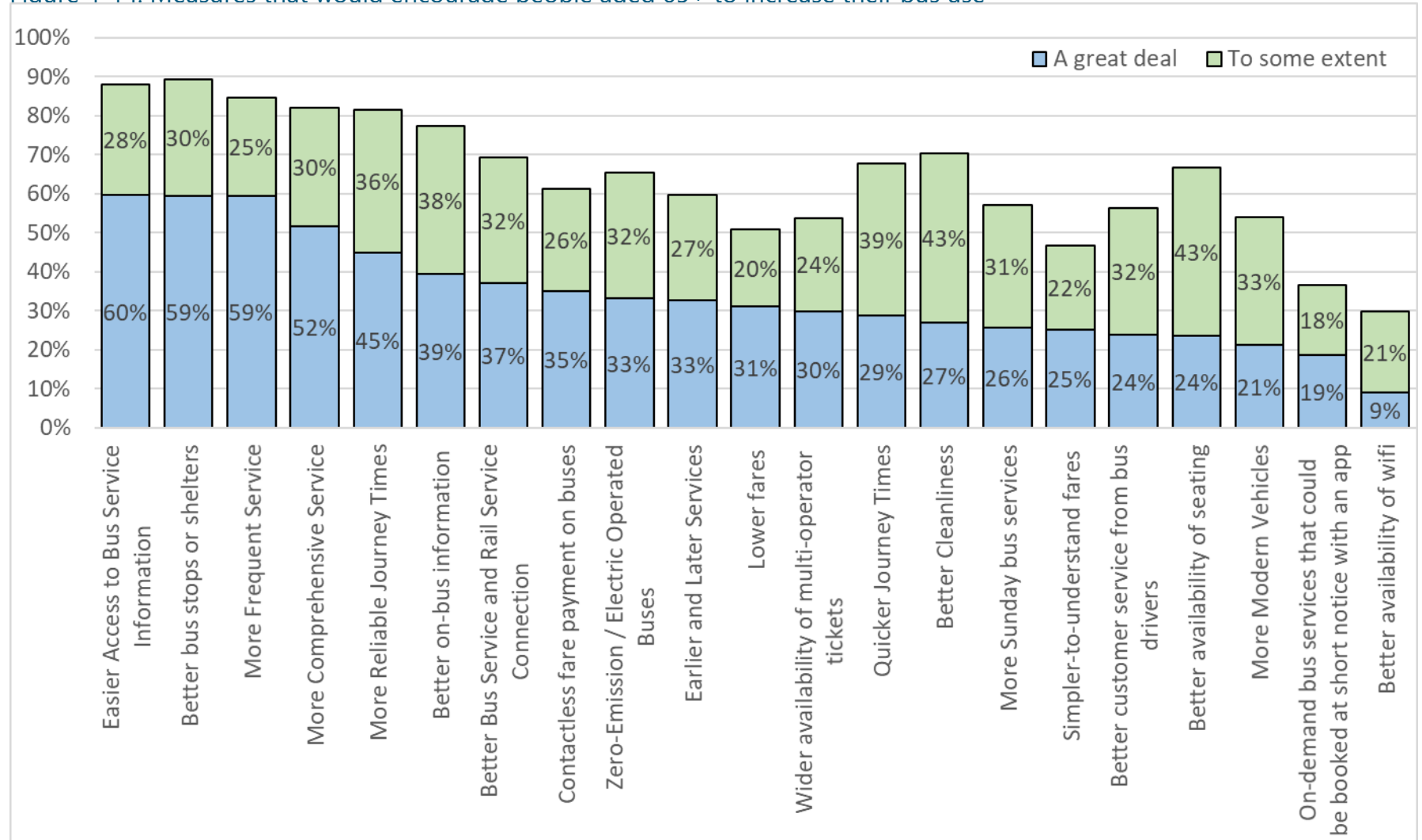
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Figure 4-14: Measures that would encourage people aged 65+ to increase their bus use

Gender

4.16   A more frequent bus service was perceived as the most effective measure at increasing bus usage for respondents across all genders. 56% of males, 66% of females and 71% of those that prefer to self-describe considered this would increase their bus usage 'a great deal'

4.17   There was agreement across the genders on three of the top five measures which would increase their bus use to a great extent. As well as a more frequent service, 'earlier and later services' and 'easier access to bus service information' were considered to be effective. Figure 4-15, Figure 4-16 and Figure 4-17Table 4-5 provide a more detailed breakdown across all measures by 'a great deal' and 'to some extent'.

Table 4-4: Summary comparison of the 'Top 5' measures considered most effective per gender

Ranking (based on *a great deal*)	Male	Female	Prefer to self-describe
1	More Frequent Service	More Frequent Service	More Frequent Service
2	Earlier and Later Services	Easier Access to Bus Service Information	Lower fares
3	More Comprehensive Service	More Comprehensive Service	Earlier and Later Services
4	Lower fares	Better bus stops or shelters	Easier Access to Bus Service Information
5	Easier Access to Bus Service Information	Earlier and Later Services	Better bus stops or shelters

Figure 4-15: Measures that would encourage males to increase their bus use
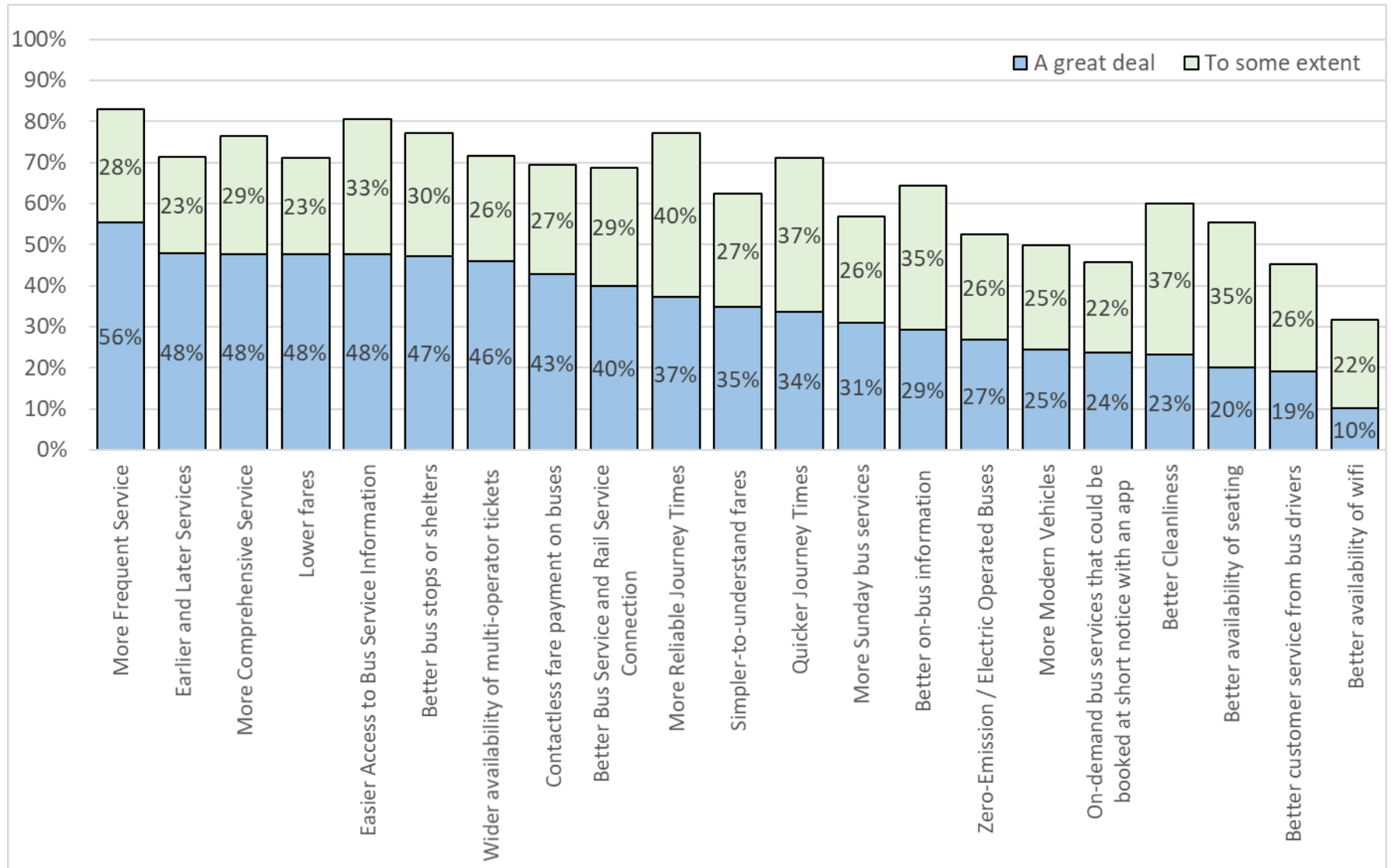
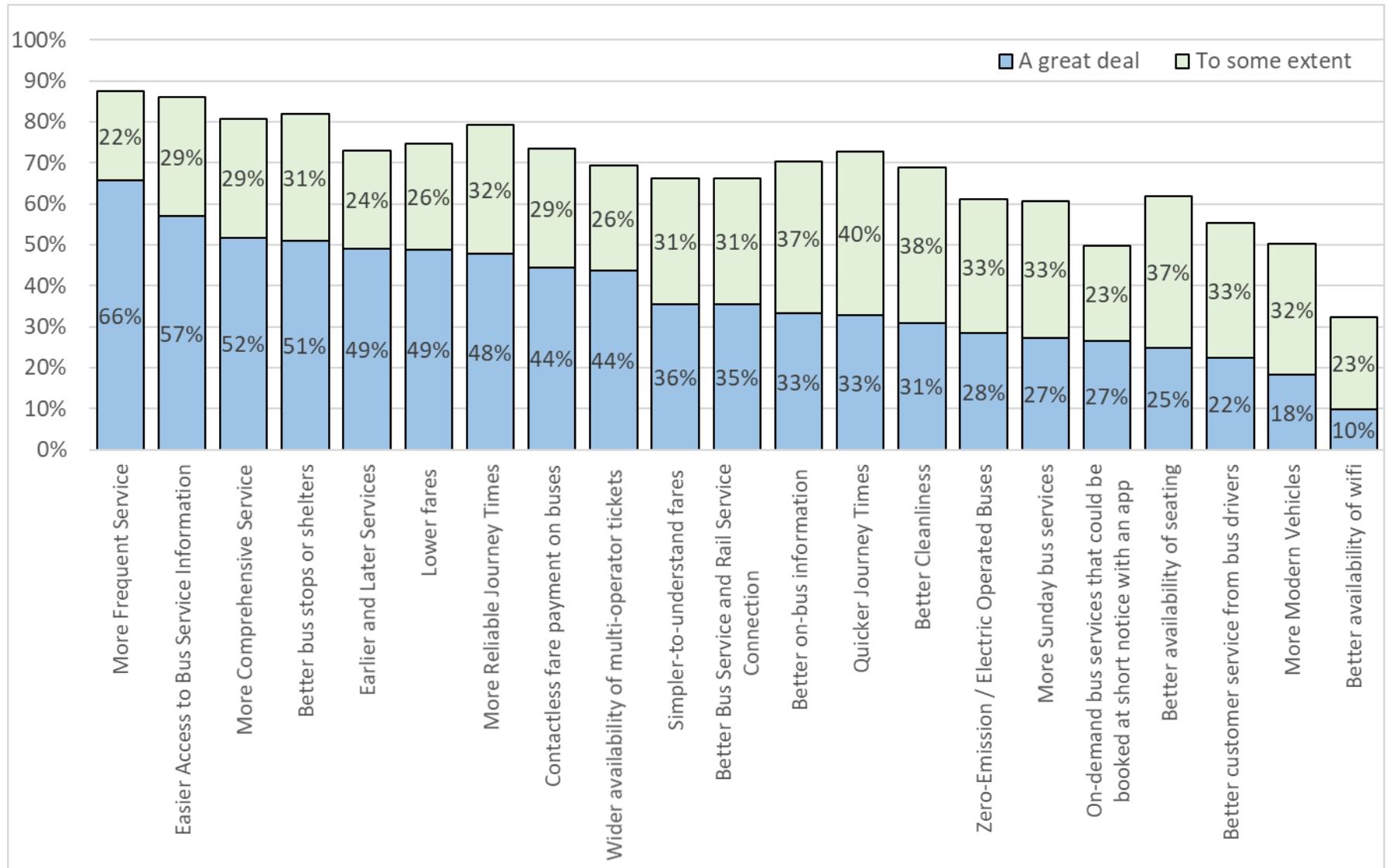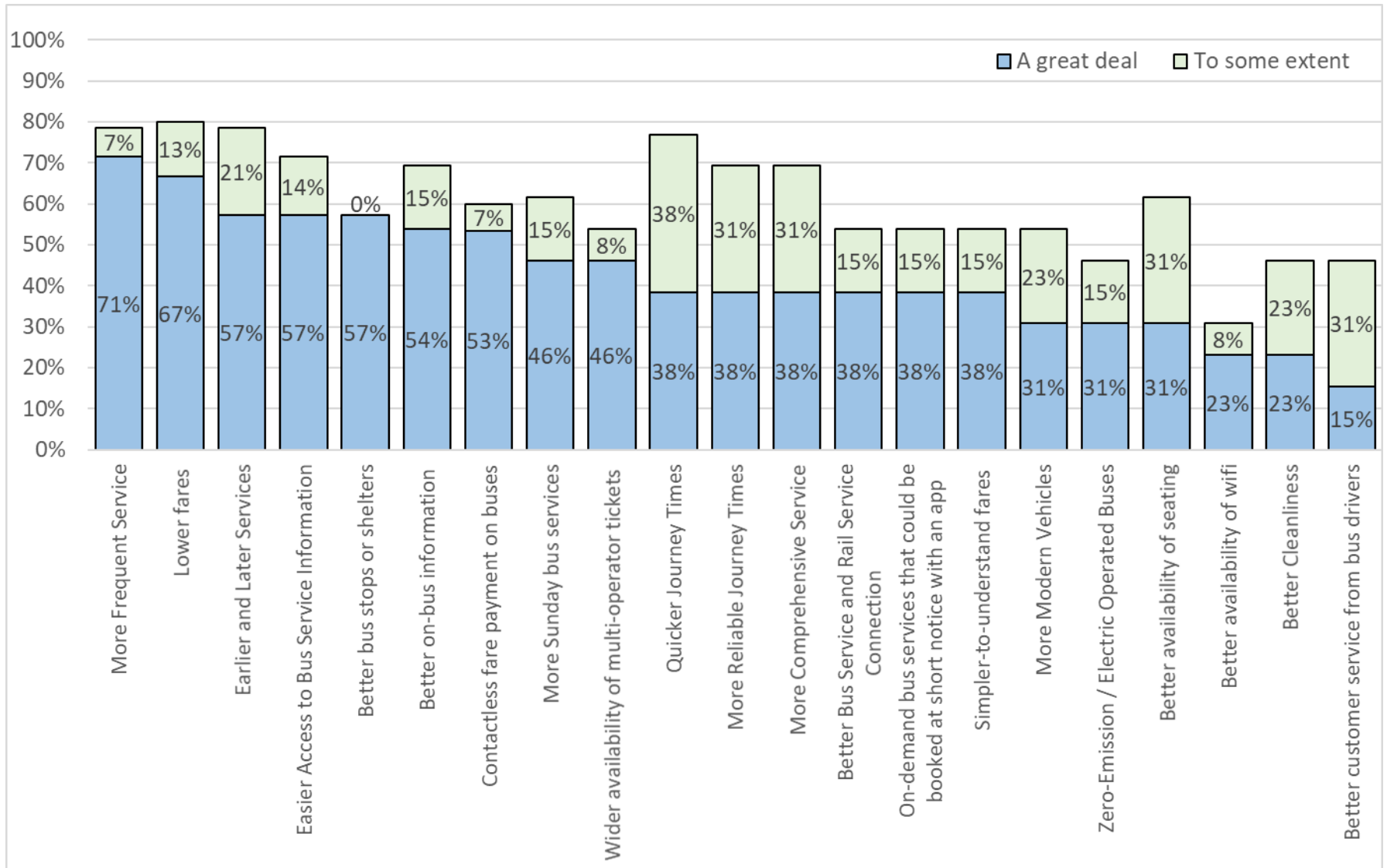Figure 4-16: Measures that would encourage females to increase their bus use

Figure 4-17: Measures that would encourage those that prefer to self-describe gender to increase their bus use

Concessionary passholding

4.18 57% of non-concessionary passholders considered lower fares would increase their bus usage 'a great deal'. Conversely (and unsurprisingly), only 29% of those that do hold a concessionary pass thought the same A comparison of the 'Top 5' measures considered most effective at increasing bus use of concessionary passholders and non-passholders is shown in Table 4-5, with a more detailed breakdown across all measures shown in Figure 4-18 and Figure 4-19. Passholders and non-passholders were in agreement on two of the top five measures most likely to encourage them to use buses more – 'a more frequent service' and 'easier access to bus service information'. Better bus stops and shelters was the key measure likely to increase bus use among passholders.

Table 4-5: Summary comparison of the 'Top 5' measures considered most effective between concessionary passholders and non-passholders

Rating (based on 'a great deal')	Concessionary passholder	Non-passholder
1	Better bus stops or shelters	More Frequent Service
2	Easier Access to Bus Service Information	Lower fares
3	More Frequent Service	Earlier and Later Services
4	More Comprehensive Service	Easier Access to Bus Service Information
5	More Reliable Journey Times	Wider availability of multi-operator tickets

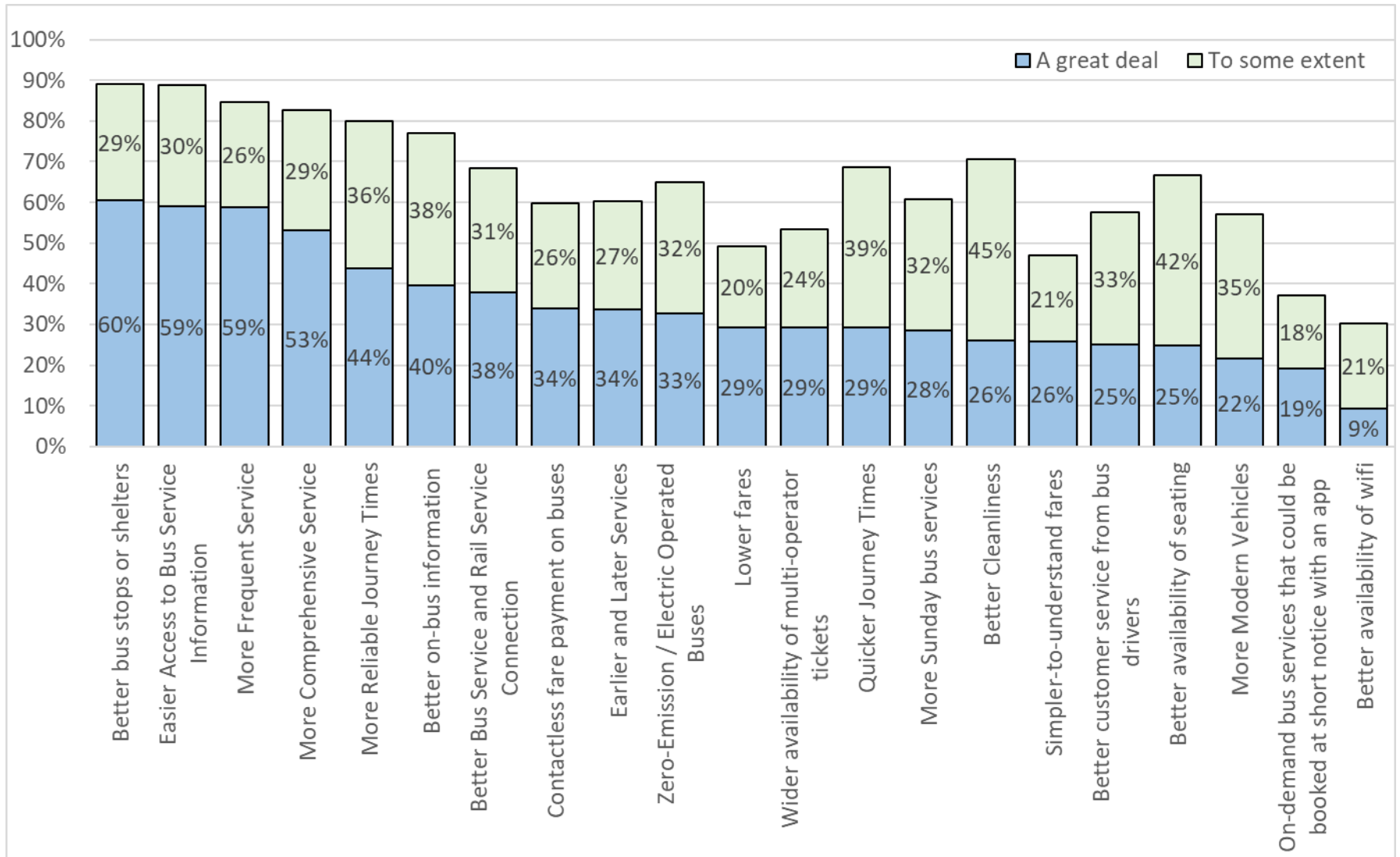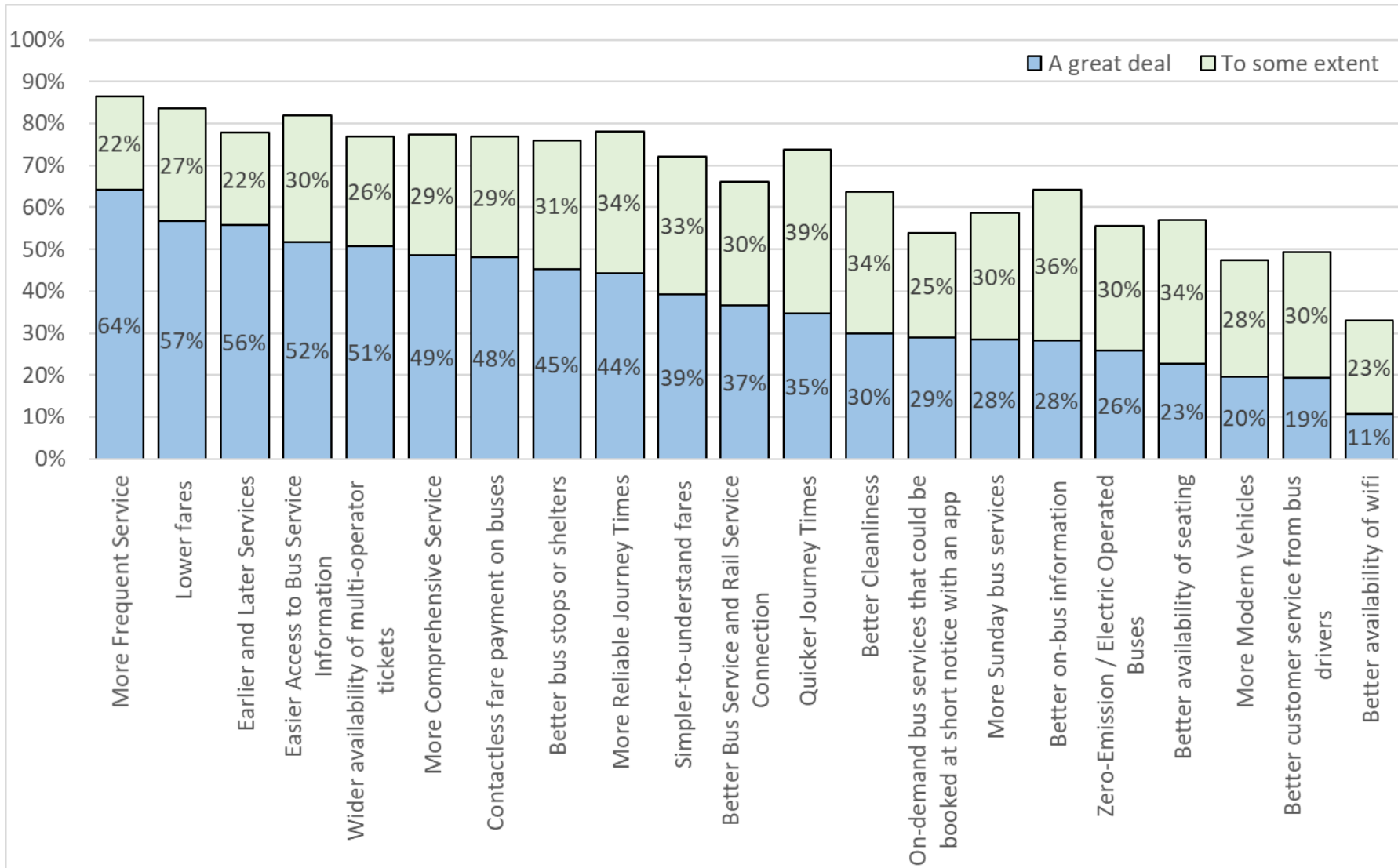Figure 4-18: Measures that would encourage concessionary passholders to increase their bus use

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Figure 4-19: Measures that would encourage non-passholders to increase their bus use

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Councillors and Organisation Representatives

4.19 This section explores the responses from those that responded to the survey in any other role, including district and local councillors and representatives of organisations, both in an official and non-official capacity. They account for 5% (82 responses) of the total number of responses received with 14 (17%) of these people providing a response on behalf of an organisation.

4.20 A more frequent service was perceived as the most effective measure that would encourage the people they represented to increase their bus use within Leicestershire. 68% (53) felt this measure would increase their bus usage by 'a great deal' with a further 23% (18) responding 'to some extent' (see Figure 4-20). This is consistent with the response received from residents and visitors, who also perceived a more frequent service as most effective in increasing their bus use.

4.21 Easier access to bus service information and earlier and later services were the measures that were also considered most likely to increase bus use among the people they represented.

4.22 Factors that councillors and representatives considered less effective in increasing bus use included:

- Better customer service from bus drivers
- Better Cleanliness
- On-demand bus services that could be booked at short notice with an app

Figure 4-20: Measures that would increase bus use as perceived by local councillors and organisation representatives
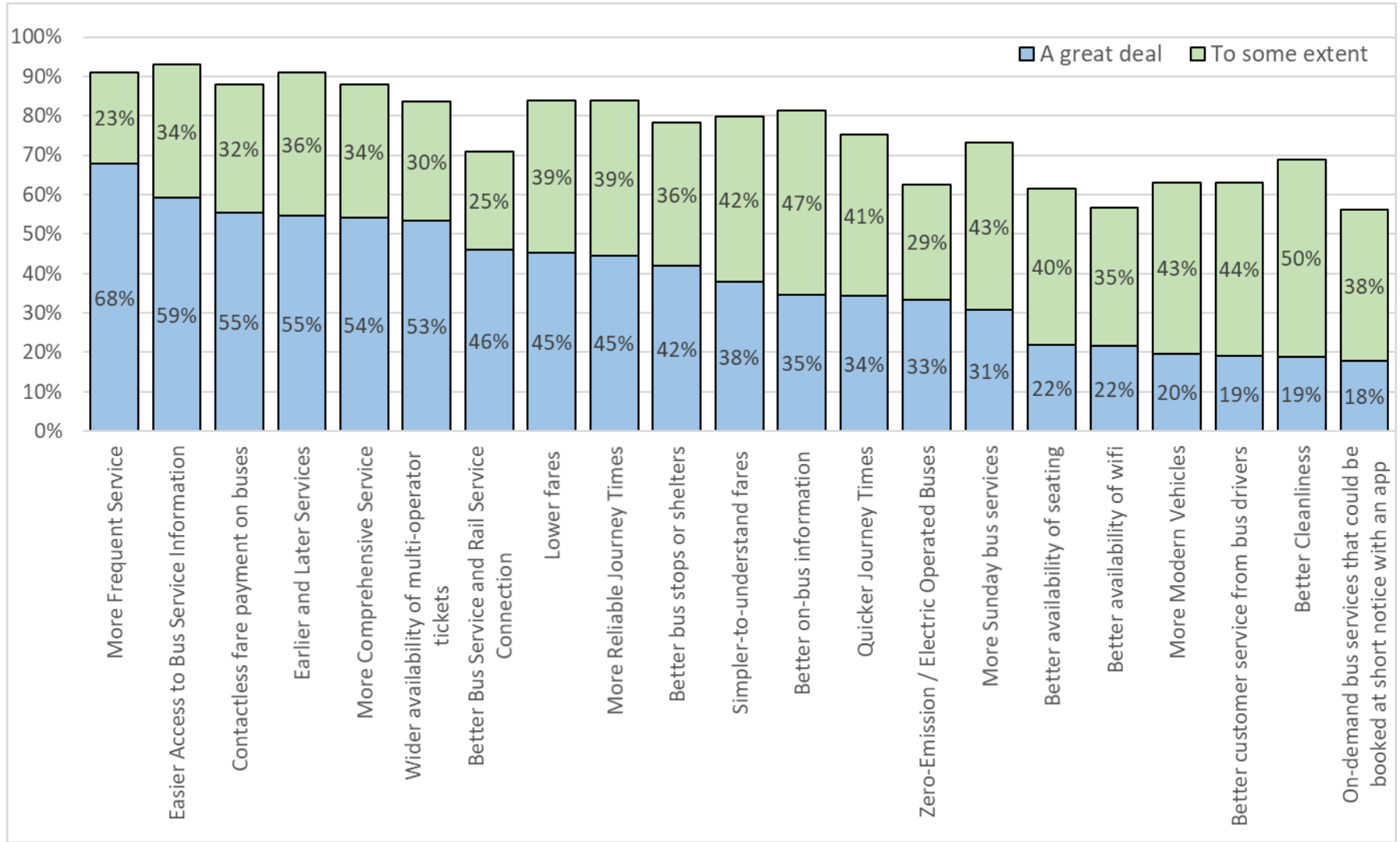
5. Summary and Conclusions

5.1 This report has set out the main findings of the Leicestershire CC BSIP Public Engagement Survey based on analysis of the 'closed' questions included in the questionnaire. A good overall sample size was achieved, although this was not fully representative of the general population, with certain groups being under-represented (e.g. males, younger people, and residents of Melton and Oadby & Wigston).

5.2 The survey questions on people's travel habits revealed that shopping and leisure were the most common trip purposes for bus use before the Covid pandemic. 54% of individual respondents expected their bus use to be the same after the pandemic as before. Encouragingly, a higher proportion of respondents expected to make more use of buses post-pandemic than they had before.

5.3 The survey responses from the overall sample of individuals (Leicestershire residents and visitors) showed the top 10 priorities shown in Table 5-1, as defined by number of responses indicating that they would make respondents likely to use buses 'a great deal' more. This table also highlights where those priorities differ between different respondent sub-groups, as highlighted within this report.

Table 5-1: Ranked priorities of individual respondents and different sub-groups

	Top 10 measures (all individual responses)	Regular bus users	Infrequent or non bus users	Blaby residents	Charnwood residents	Harborough residents	Hinckley & Bosworth residents	NW Leicestershire residents	Oadby & Wigston residents	Melton residents	People aged under 25	People aged 25-44	People aged 45-64	People aged 65+	Male	Female	Self-described gender	Concessionary passholders	Non passholders	Councillors & organisation representatives
1	More frequent service	1	1	1	1	1	1	11	21	1	2	1	1	3	1	1	1	3	1	1
2	Easier access to bus service information	3	2	2	3	3	2	12	10	6	8	6	3	1	5	2	4	2	4	2
3	More comprehensive (local buses serving more destinati	4	5	3	6	6	6	3	4	3	9	5	6	4	3	3	12	4	6	5
4	Better bus stops or shelters	2	7	5	2	4	4	4	14	8	5	9	7	2	6	4	5	1	8	10
5	Earlier and later services	5	6	6	9	2	5	18	7	2	3	3	2	10	2	5	3	9	3	4
6	Lower fares	7	3	4	5	7	8	17	11	7	1	2	4	11	4	6	2	11	2	8
7	Wider availability of multi-operator tickets	8	8	7	4	8	7	6	6	16	4	7	5	12	7	9	9	12	5	6
8	More reliable journey times	6	11	8	7	10	3	1	12	4	7	8	10	5	10	7	11	5	9	9
9	Contactless fare payment on buses	9	4	9	8	5	9	19	9	10	6	4	8	8	8	8	7	8	7	3
10	Better bus service and rail service connections	10	10	10	11	9	13	15	8	5	11	11	11	7	9	11	13	7	11	7

5.4   This information, alongside views and inputs from bus operators and council officers, forms invaluable input into shaping Leicestershire's Bus Service Improvement Plan (BSIP).

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